

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

September 2019

**Highlights**

**Infrastructure and transport decrease as the highest priority national issue**

- In the September 2019, 16% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, down from 19% in September 2018. In the September 2019, 9% of Australians nominated transport as one of the two highest priority issues in Australia today, slight down from 10% in September 2018.

**Public transport the highest priority for transport**

- In the September 2019, 34% of Australians said that the highest priority issue for transport in Australia is public transport improvements, down from 40% in September 2018. This is followed by road improvements and other issues which are both 24%.

**Transport not changed in local areas**

- In the September 2019, 54% of Australians said that transport in their local areas is the same now as one year ago, slightly down from 55% in the September 2018.

**Lower level of confidence about local transport in the short-term**

- In the September 2019, 17% of Australians said that transport in their local area will be better in one year's time, slightly down from 18% in the September 2018.

**Lower level of confidence about transport in Australia in the short-term**

- In the September 2019, 17% of Australians think that transport in Australia will be better in one year's time, slightly down from 19% in the September 2018.

**Australians less confident about transport in Australia in the longer-term**

- In the September 2019, 33% of Australians think that transport in Australia will be better in five years, down from 34% in the September 2018 and up from 30% in the March 2019.

**ITLS Index of Transport Confidence**

- Compared to the launch of TOPS in March 2010, in September 2019 Australians are less confident about transport in their local area (Confidence index: down from 100 to 87), and across Australia in one-year time (Confidence index: down from 100 to 75), and in five years (Confidence index: down from 100 to 81).

**Australians consider moving to regional centres if faster train takes less than 1 hour between the regional centre and their cities**

- About 40% of Australian respondents think about relocating to a regional area if there was a high-speed rail taking less than 1 hour traveling between the regional centre and their capital city. In comparison, the same proportion of Australian residents consider never move regardless of travel time of fast train to regional centres.

**Nearly seven in ten respondents are familiar with travel planning apps in smart phone while two in ten respondents almost do not know about these apps**

- 45% of Australian participants said they are familiar with smart-phone apps for planning their local travel with the range from 7 to 10 of the scale 0-10 whereas 21% of Australian said they are almost unfamiliar (0-1) with travel planning apps.

**About the Transport Opinion Survey**

The Transport Opinion Survey is a biannual survey (quarterly from 2011 backwards) 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. The survey methodology was changed to an online survey from the March 2014, using an online panel.

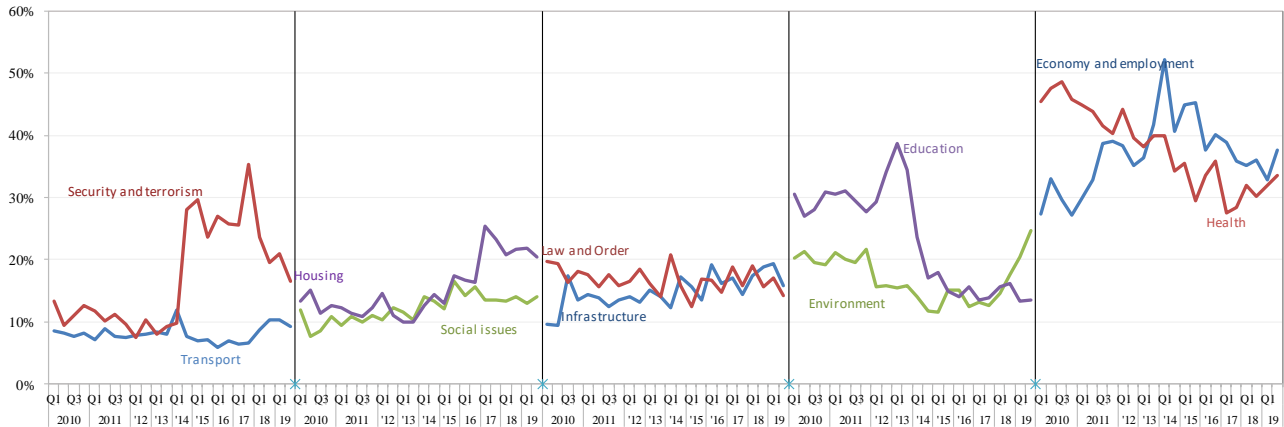
The September 2019 survey was conducted between 6 – 9 September 2019. This report is based on the data from 983 completed responses. Current issues in this September 2019 survey included asking Australian respondents if they think about moving to live in a regional centre given faster rail services were provided to halve travel time between capital cities and regional centres. In addition, they were asked about their familiarity level with smartphone apps for local travel planning.

## Transport as a national priority

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

- In September 2019, the economy and employment continued to show up as the highest priority issue in Australia, nominated by 38% of Australians, followed by health (34%). Australians were concerned and well informed about environment (25%) and housing (20%), which continued to be nominated among two top priority issues in Australia by many respondents in this September survey.
- 16% of Australians nominated infrastructure and 9% nominated transport as one of the two highest priority issues in Australia today.

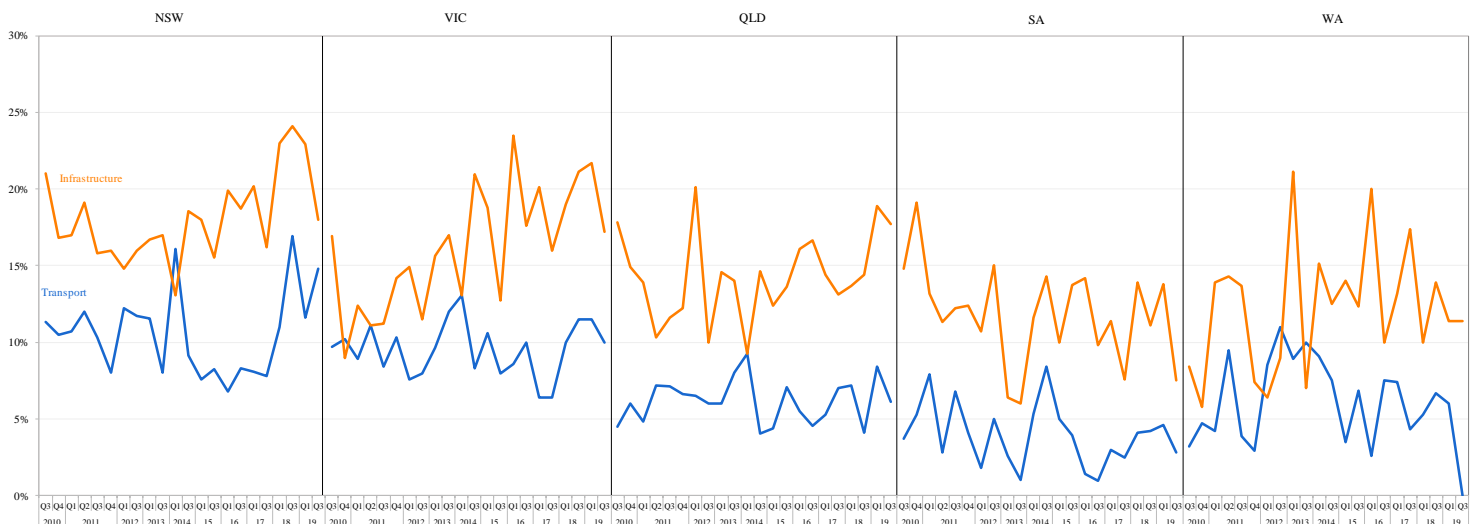
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2019 Q3



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 3 of 2019, 15% of New South Wales residents nominated transport as a priority as compared to almost none of Western Australian residents nominated this category.

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

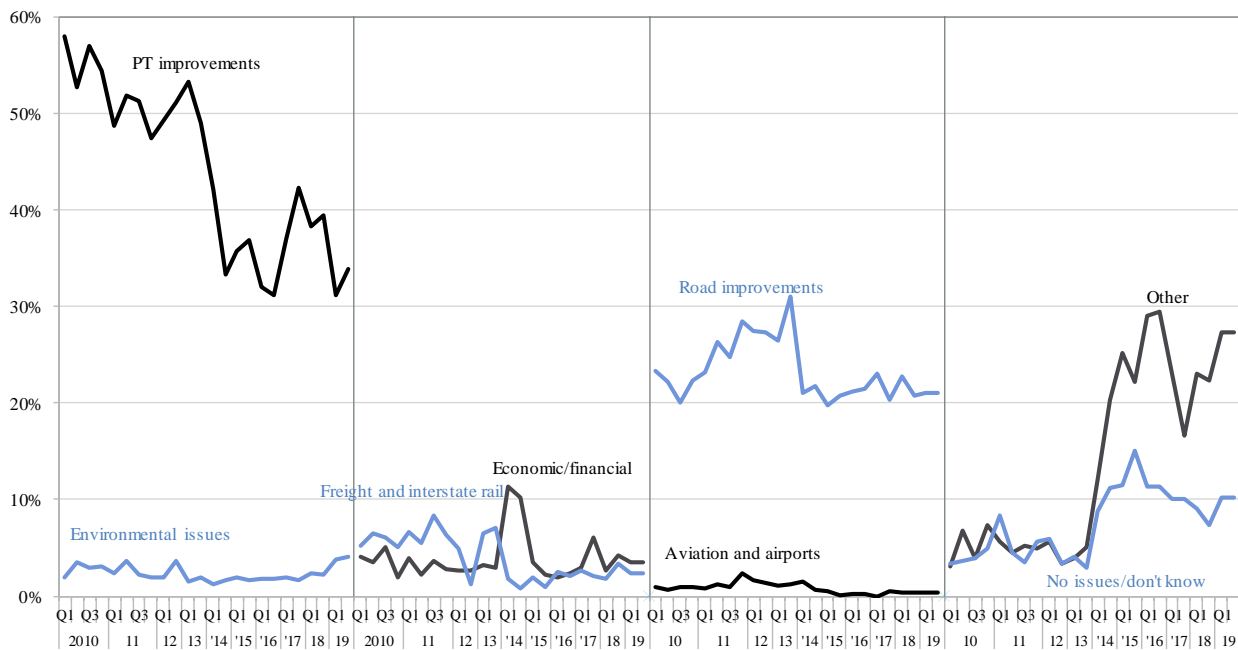


### 1. Highest priority issue for transport

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

- In the September 2019, 34% 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. 24% of Australians nominated road improvements and 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.

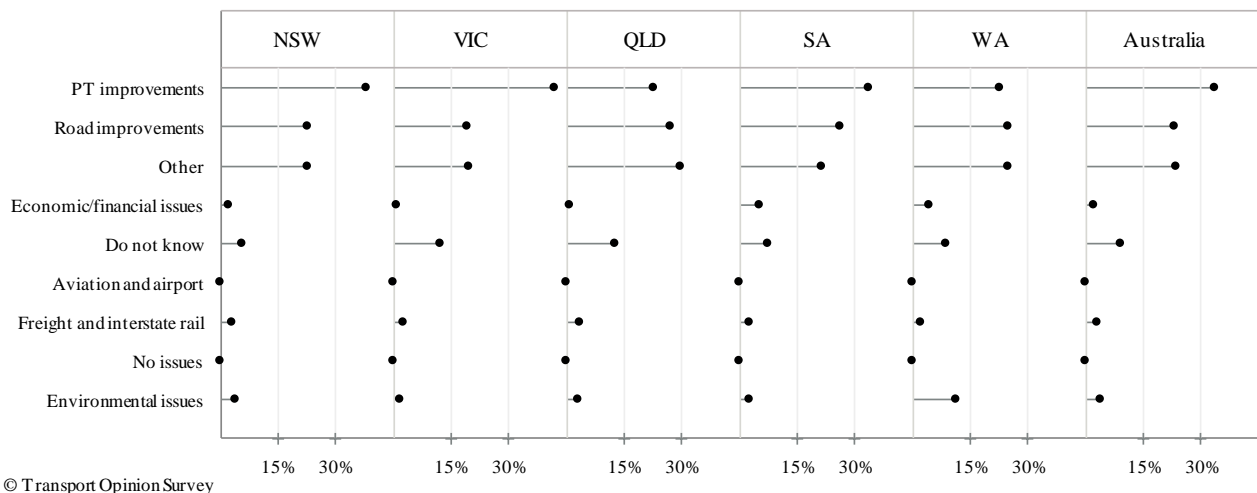
Highest priority transport issue in Australia, 2010 Q1 - 2019 Q3



Note: percentages add up to 100% in each survey. "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 September 2019, New South Wales, Victoria and South Australia regarded public transport improvements as the highest priority issue in transport whereas Queensland and Western Australia considered other issues such as population growth, funding and environment as the top priority issue in transport. The second highest priority is road improvements in all states.

Highest priority transport issue by state, 2019 Q3

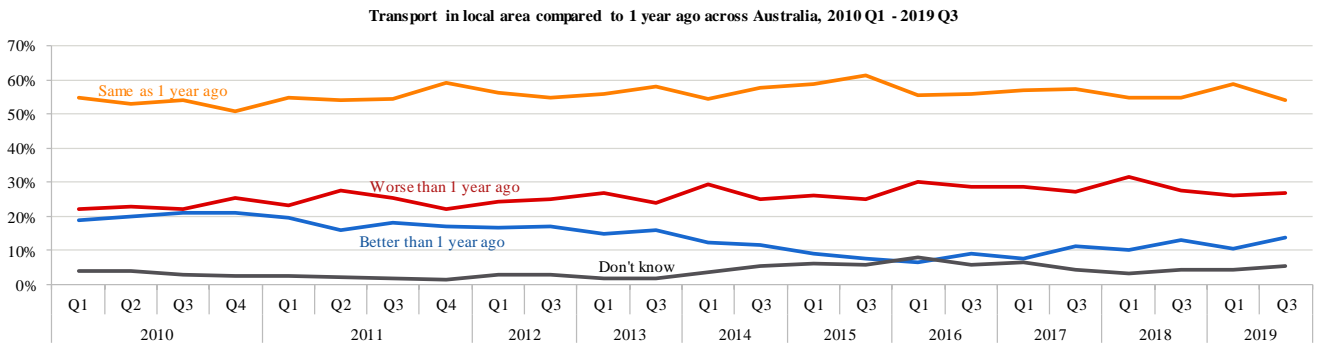


© Transport Opinion Survey

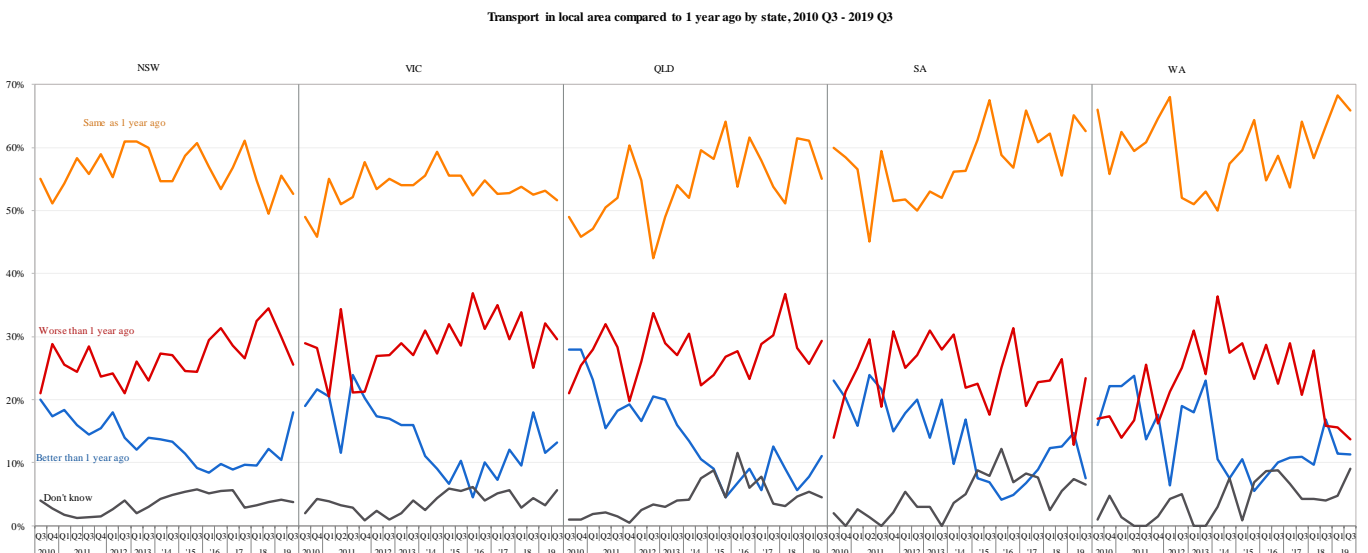
## 2. Local transport does not change

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 third of 2019, only 14% of Australians believed that transport in their local areas is better now than one year ago, while 54% of Australians said it is the same as one year ago, and 27% of Australian said it is worse now than one year ago.



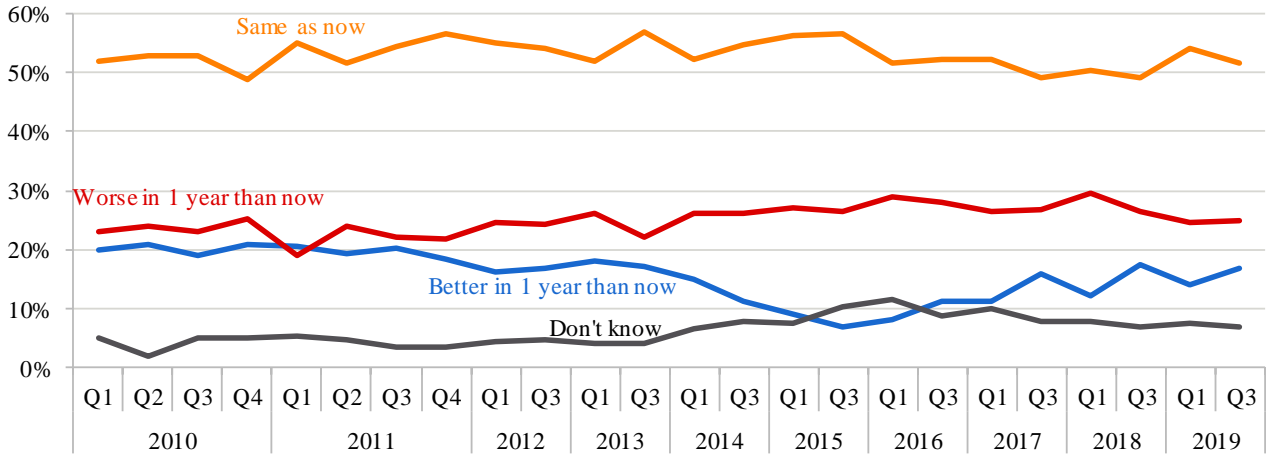
- The evaluation of transport in the local area by respondents is relatively consistent across all states of Australia, with most respondents identifying it as the same as one year ago. Compared with the March 2019, there is an increase in most of states in the percentage of residents responding that transport in their local area is better now than one year ago, except South Australia and Western Australia stayed the same in this category. In contrast, the proportion of residents thinking that transport becomes worse in their local area decreases in three out of five states, except Queensland and South Australia 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?*

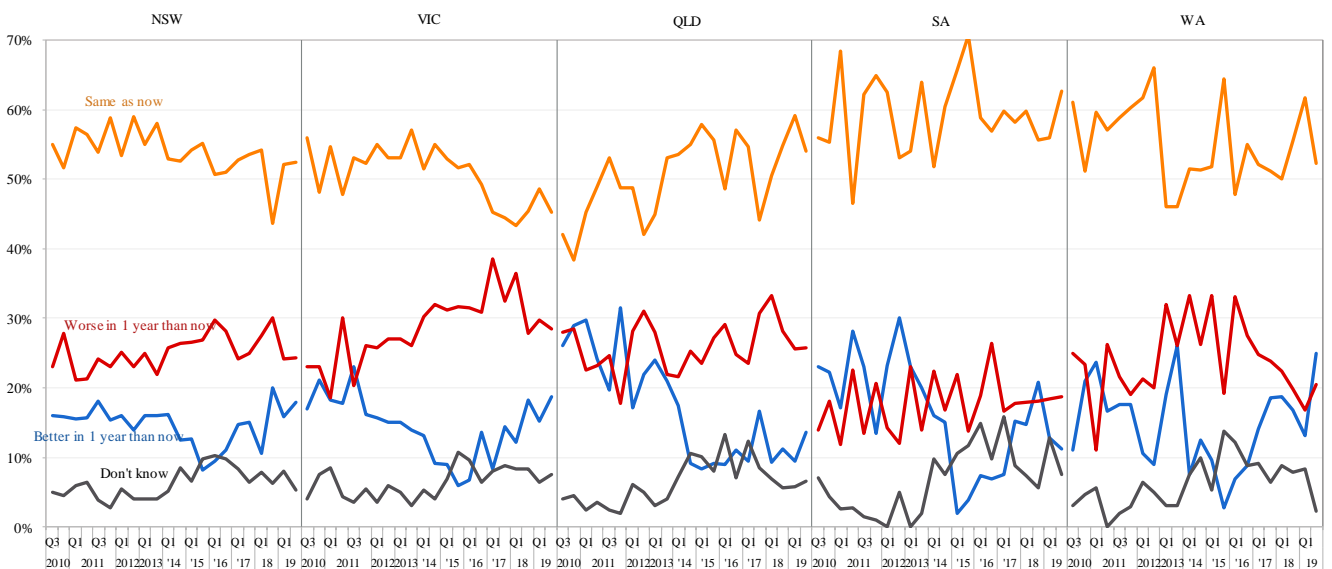
- In the September 2019, 52% of Australians said that transport in their local area will be the same in one year's time. 17% said transport will be better, slightly down from 18% in the September 2018 while 25% said transport will be worse, slightly down from 27% in the third of 2018.

**Transport in local area in 1 year time across Australia, 2010 Q1 - 2019 Q3**



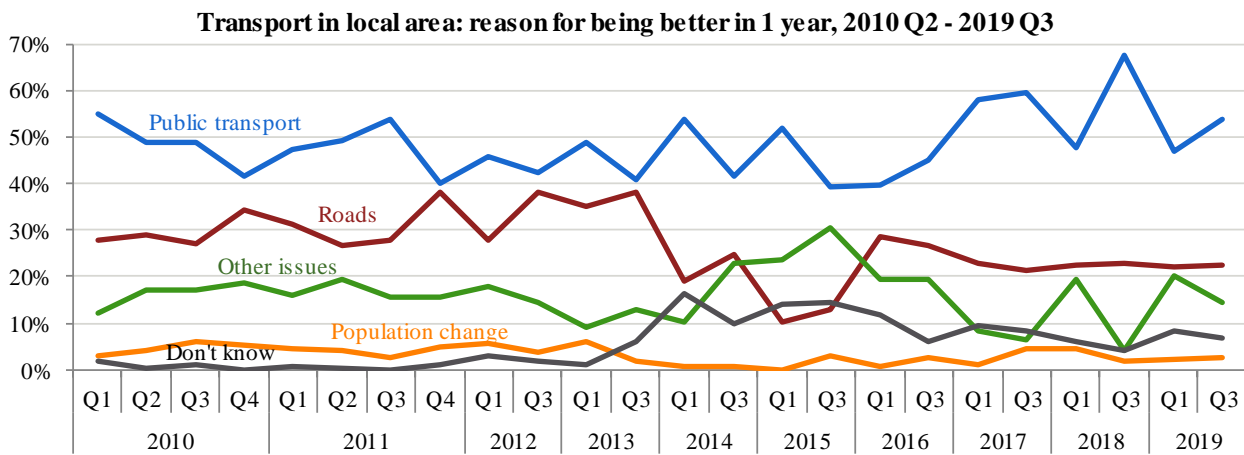
- 25% of Western Australian residents believed that transport in their local area will be better in one year's time; while 28% of Victorian residents believed that transport in their local area will be worse in one year's time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

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

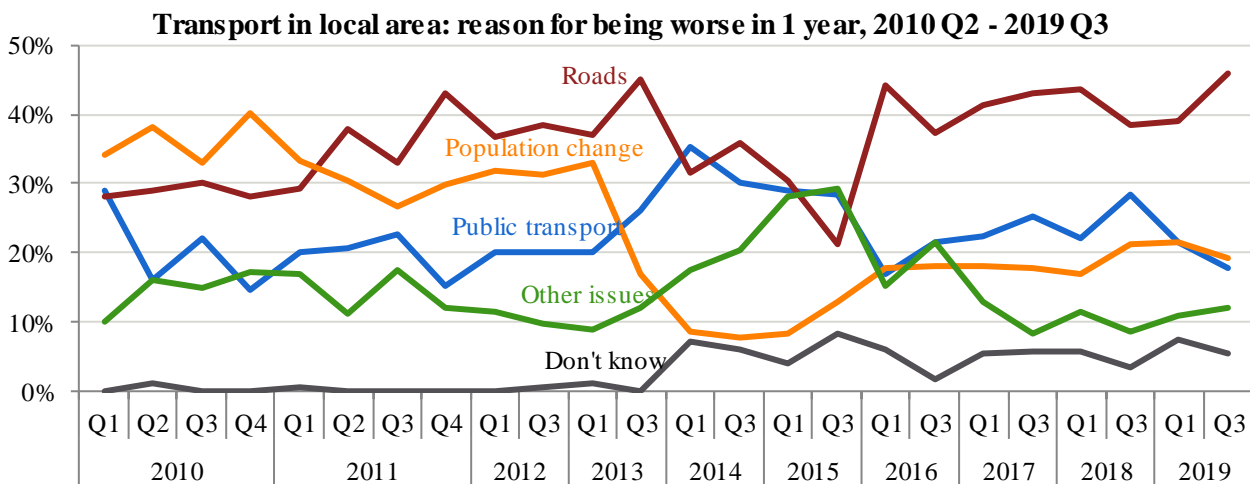


What were you thinking of most when answering that question [about transport in your local area in 1 year's time?]

- 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. Both public transport and roads increased as the main reasons for transport being better or worse, as compared to last year. In addition to public transport and roads, population change slightly grew as one of the main reasons for residents to believe that their local transport will be better in one year while it declined 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, decreased as main reasons for local transport being better whereas it increased as those for local transport becoming 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.



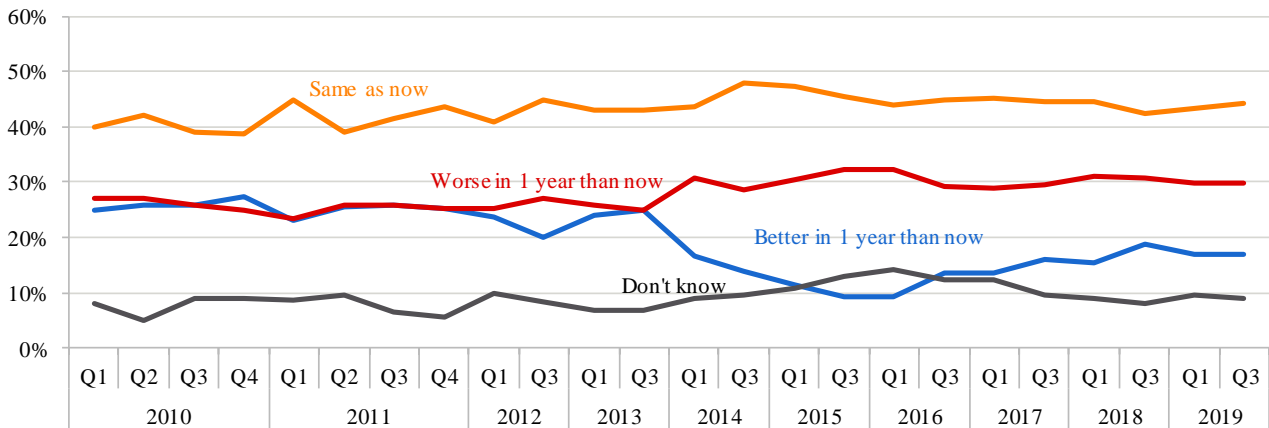
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

### 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?*

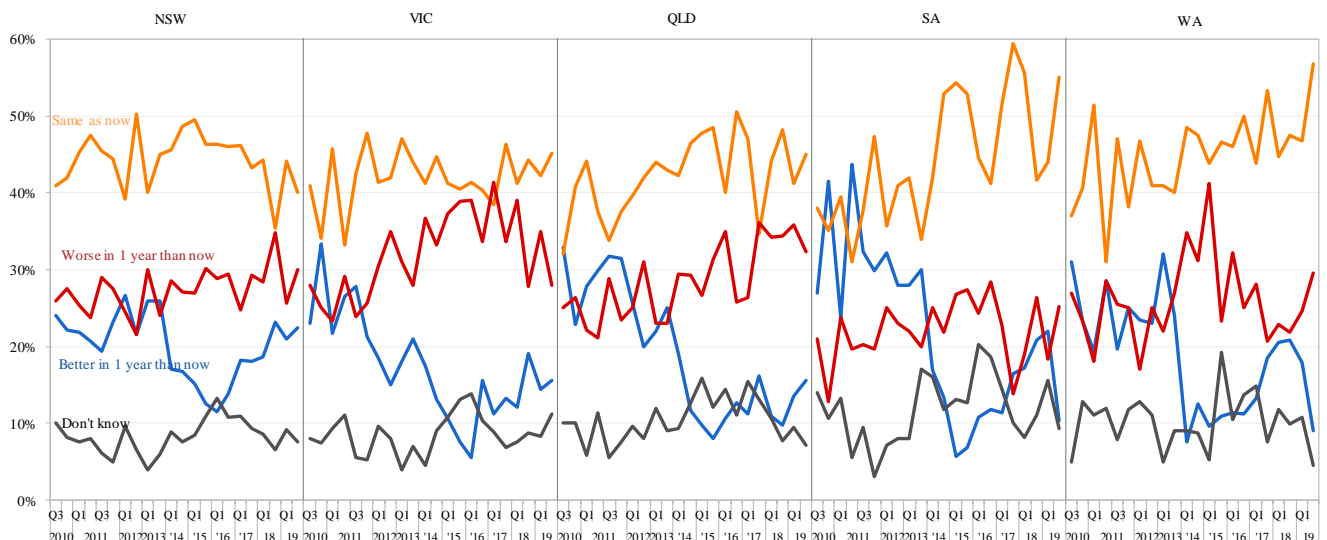
- In the September 2019, 44% of Australians said that transport in Australia in one year will be the same as now, with 17% of Australians saying that transport in Australia will be better in one year's time, slightly down from 19% in the same last year.

Transport in Australia in 1 year, 2010 Q1 - 2019 Q3



- In the September 2019, about 32% of Queensland residents said that transport in Australia will be worse in one year, and around 16% said that it will be better. Western Australian residents are relatively less confident about transport in Australia in one year's time, as compared to other states, with 9% of their residents believing that transport in Australia will be better in one year's time and 30% of the residents thinking that Australian transport will be worse in one year's time. New South Wales residents are the most confident about Australian transport in one year with 22%.

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

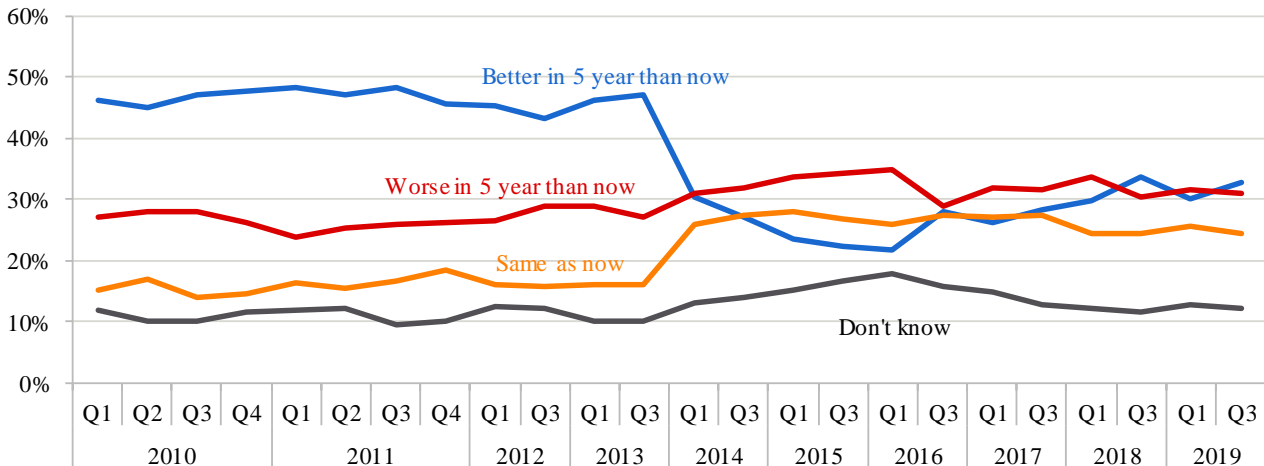




*Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?*

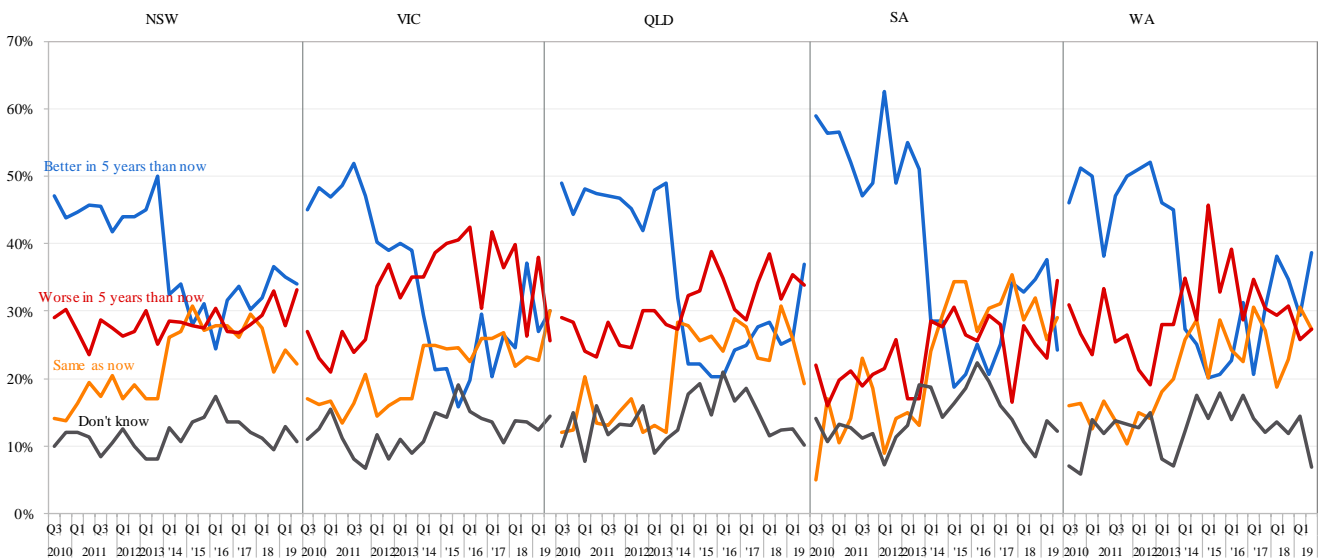
- Australians are slightly losing confidence that transport will be better in five years than it is now. In the September 2019, 33% of Australian residents believed transport in Australia will be better in five years, slight down from 34% in the September 2018. Also, slightly more people believed that transport in Australia will get worse in five years' time compared to the September 2018.

**Transport in Australia in 5 years, 2010 Q1 - 2019 Q3**



- In the September 2019, 39% of Western Australian and 37% of Queensland 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 South Australia are least confident, where 24% 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 Q3**



#### 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 1, March 2010. In each survey (quarterly from 2011 backwards, biannually from 2012 onwards), 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.

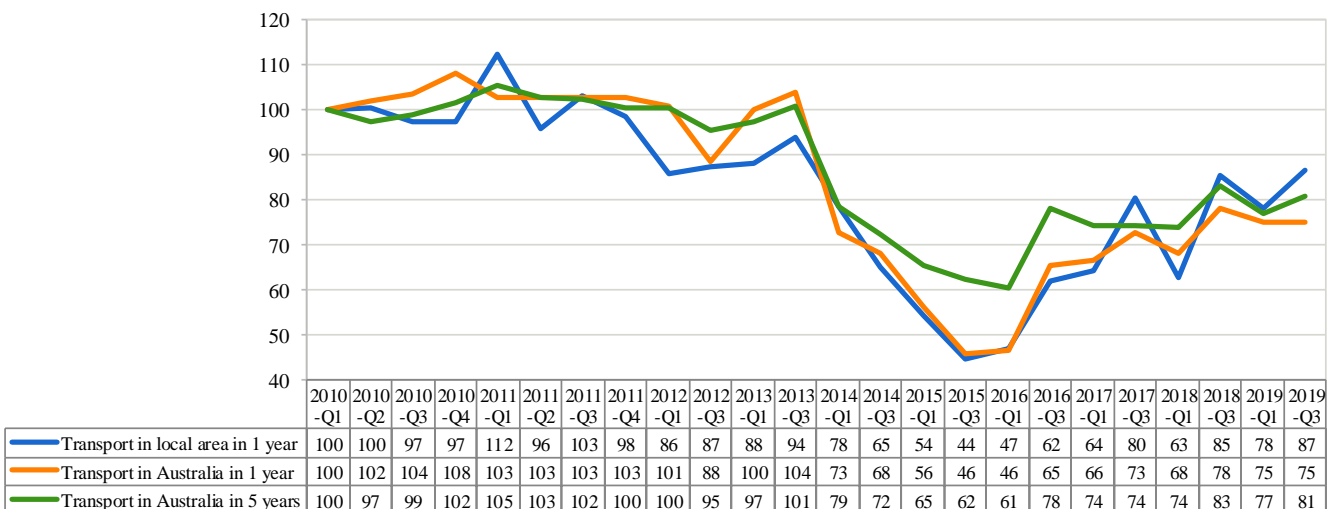
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

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

- Australians have become more confident about transport in their local area in one year's time.
- Australians have become less 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 September 2018 (Confidence index: from 100 to 87), 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 81). 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

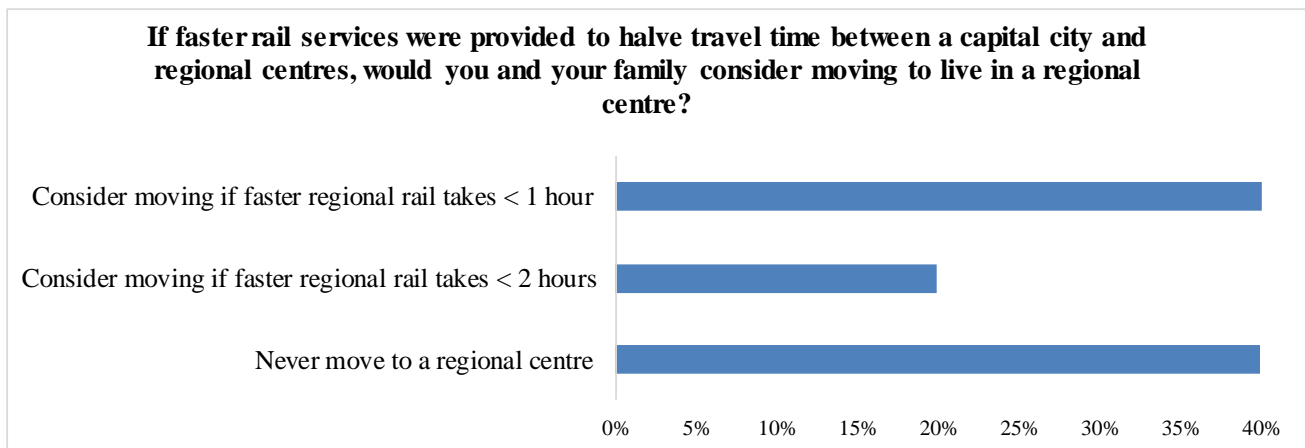


5. **Supplementary questions on asking Australian respondents if they think about moving to live in a regional centre given faster rail services were provided to halve travel time between capital cities and regional centres. They were also asked about their familiarity level with smart-phone apps for local travel planning.**

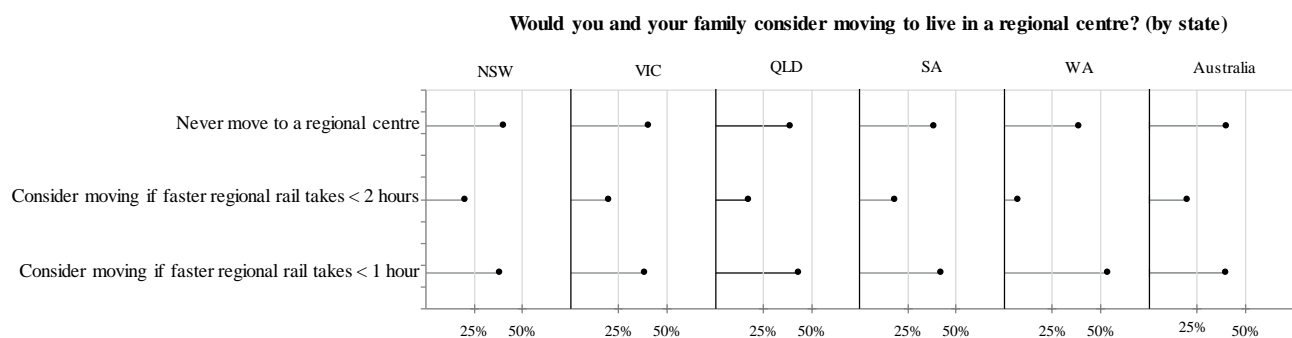
In the September 2019, two new questions were asked to understand public opinion on their thoughts about Australian respondents if they consider moving to live in a regional centre if there are faster rail services were provided with half travel time between a capital city and regional centres. In addition, they were asked about their familiarity level with using smart-phone apps for travel planning.

*If faster rail services were provided to halve travel time between a capital city and regional centres, would you and your family consider moving to live in a regional centre?*

Approximately 34% of Australian participants said they already in a regional centre. Among the Australian respondents living in capital cities, 40% of them considered relocating to regional centres if there are high-speed train services supplied with less than 1 hour traveling between the regional areas and their capital city while only half of this group with about 20% thought about moving if the travel time increases twice (2 hours). Meanwhile, there is also approximately 40% of Australian respondents thinking they would never move regardless of travel time to regional centres from their capital cities.



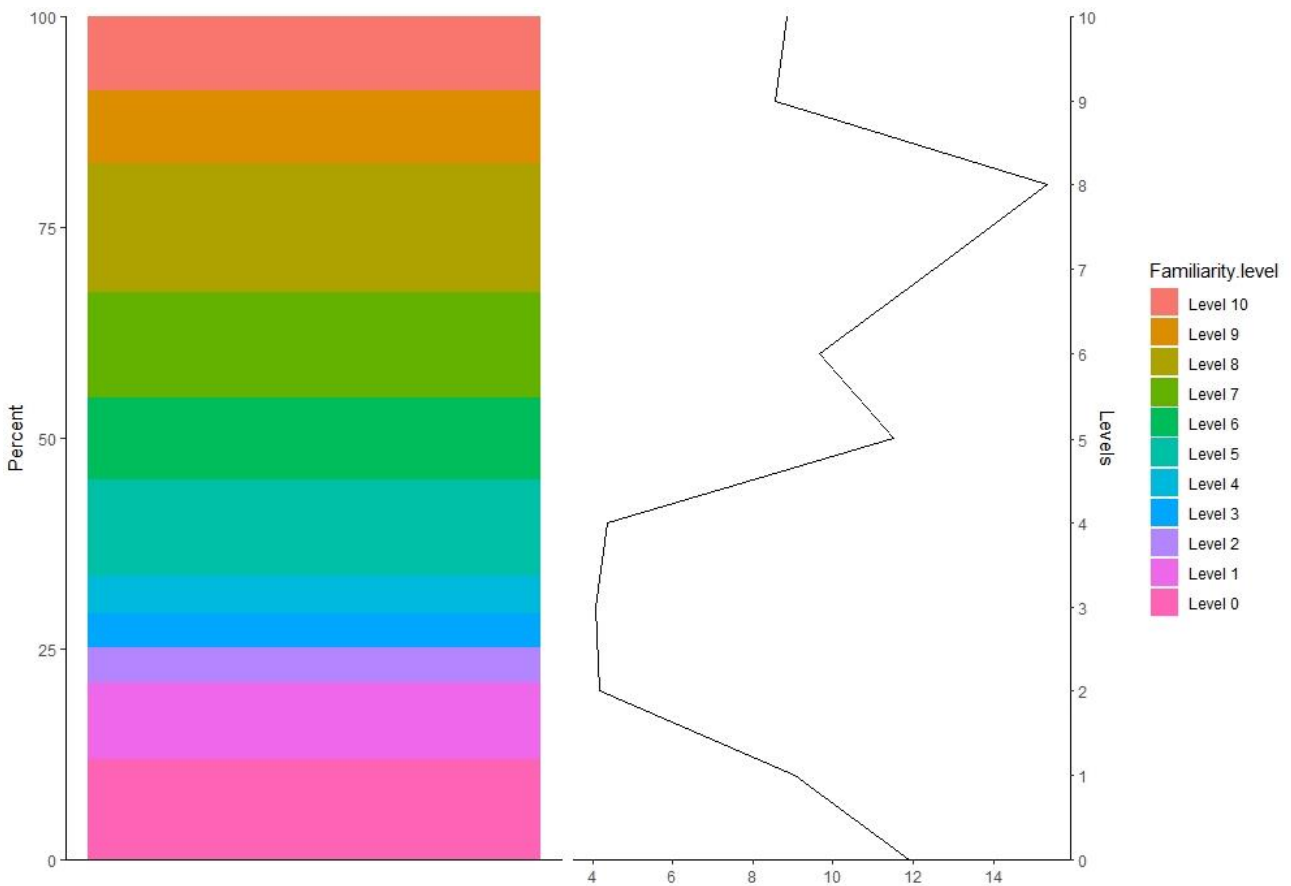
New South Wales and Victorian respondents were the most likely to move to regional areas given 2-hour faster train services provided with approximately 20% and 21%, respectively) while Western Australian participants were least likely to relocate with only 7.7%. When the travel time is reduced half, this figure is almost doubled across most of states, except for Western Australian. About nearly 40% of metropolitan respondents said that they would never move to a regional centre as a result of rails become faster, and this statistic is very similar across Australian states, except for Western Australia where most respondents (75 percent) already live in a regional centre.



*On a scale from 0 to 10, how familiar are you with smart-phone apps that plan your local travel?*

- When asked about the familiarity level of smart-phone apps for planning local travel, 45% of Australian respondents claimed that they are familiar with these apps at level 7 and above (left graph).
- Around 20% of respondents has an average level of familiarity with smartphone travel apps (score 5 and 6).
- About 21 % of respondents said that they almost do not know how to use travel-planning apps in their smart phones.
- There are small proportions of Australian respondents thinking they know little about the travel-planning apps with approximately 4% for each group of participants responding each level within 2-4.

**How familiar are you with smart-phone apps that plan your local travel?  
(0: not at all, 10: extremely familiar)**



## Timing of TOPS

The fieldwork 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
- September 2019: 6-9 September 2019

## More information

Visit the TOPS website for the reports, media coverage and to register to receive TOPS updates by email twice a year.

<https://sydney.edu.au/business/our-research/institute-of-transport-and-logistics-studies/transport-opinion-survey.html>

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.

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

Email [business.itlsinfo@sydney.edu.au](mailto:business.itlsinfo@sydney.edu.au)