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Business School

Transport Opinion Survey (TOPS)

March 2020

Institute of Transport and Logistics Studies (ITLS)



Highlights

Note: This survey was undertaken in early late February and early March just before the major changes in working from home occurred

Infrastructure and transport decrease as the highest priority national issue

- In the March 2020, 18% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, slightly down from 19% in March 2019. In the March 2020, 7% of Australians nominated transport as one of the two highest priority issues in Australia today, down from 10% in March 2019.

Public transport the highest priority for transport

- In the March 2020, 33% of Australians said that the highest priority issue for transport in Australia is public transport improvements, slightly up from 31% in March 2019. This is followed by other issues (22%) and road improvements (22%).

Transport not changed in local areas

- In the March 2020, 55% of Australians said that transport in their local areas is the same now as one year ago, down from 59% in the March 2019.

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

- In the March 2020, 15% of Australians said that transport in their local area will be better in one year's time, slightly up from 14% in the March 2019.

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

- In the March 2020, 16% of Australians think that transport in Australia will be better in one year's time, slightly down from 17% in the March 2019.

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

- In the March 2020, 28% of Australians think that transport in Australia will be better in five years, slightly down from 30% in the March 2019.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in March 2020 Australians are less confident about transport in their local area (Confidence index: down from 100 to 77), and across Australia in one-year time (Confidence index: down from 100 to 72), and in five years (Confidence index: down from 100 to 75).

Australians are less keen on replacing public transport trips with car trips despite being offered a flat fare of 5\$ for any Uber/Taxi trip up 5km from their home to a public transport station

- 54% of Australians would not agree to replace private car trips with public transport trips despite being offered a flat fare of 5\$ for any Uber or Taxi trip up 5km from their home to a public transport station.

The most important feature for improving public transport

- Approximately 36% and 28% of Australian residents scored five for reliability and crowding are among the most important features which Australian residents want to improve, followed by fare level, travel time and frequency.

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.



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The March 2020 survey was conducted between 26 February and 4 March 2020. This is the sixth wave of the longitudinal panel survey launched in March 2015. This report is based on the data from 1498 completed responses, including 895 repeated samples from the last Wave and 603 fresh samples. Current issues in this quarter included asking Australian residents if they would use public transport instead of car on regular basis if they are offered a flat fare of \$5 for any Uber/Taxi trip up to 5km connecting their place to or from a public transport station. They also were asked to rank from one to five among the most important features for improving public transport, including travel time, frequency, fare level, crowding, and reliability.

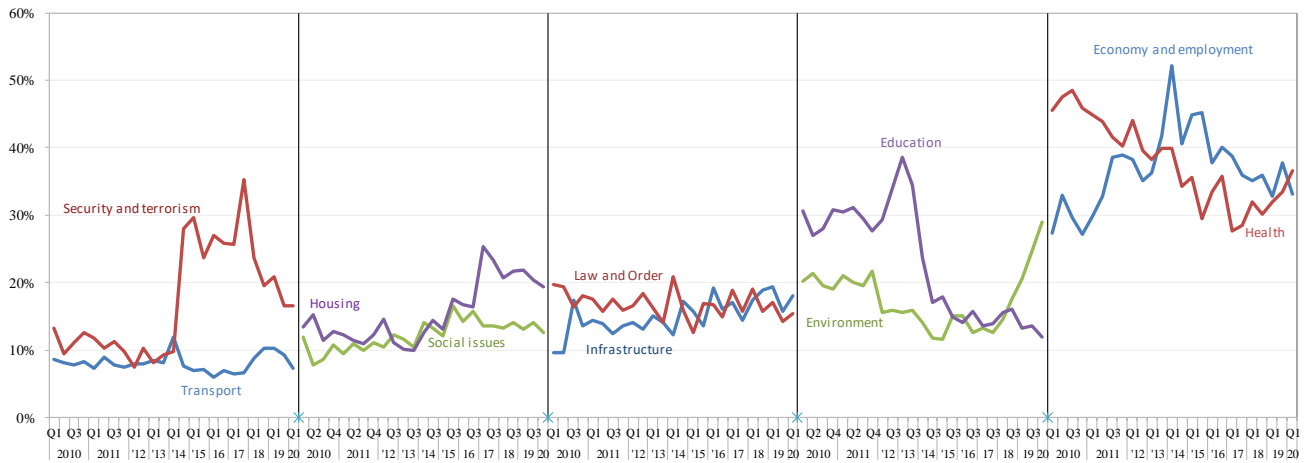


Transport as a national priority

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

- In March 2020, the health increased as the highest priority issue in Australia, nominated by 37% of Australians, followed by economy and employment (33%). Australians were concerned and well informed about environment (29%), followed by housing (19%), which continued to be nominated among two top priority issues in Australia by many respondents in this March 2020.
- 18% of Australians nominated infrastructure and 7% nominated transport as one of the two highest priority issues in Australia today.

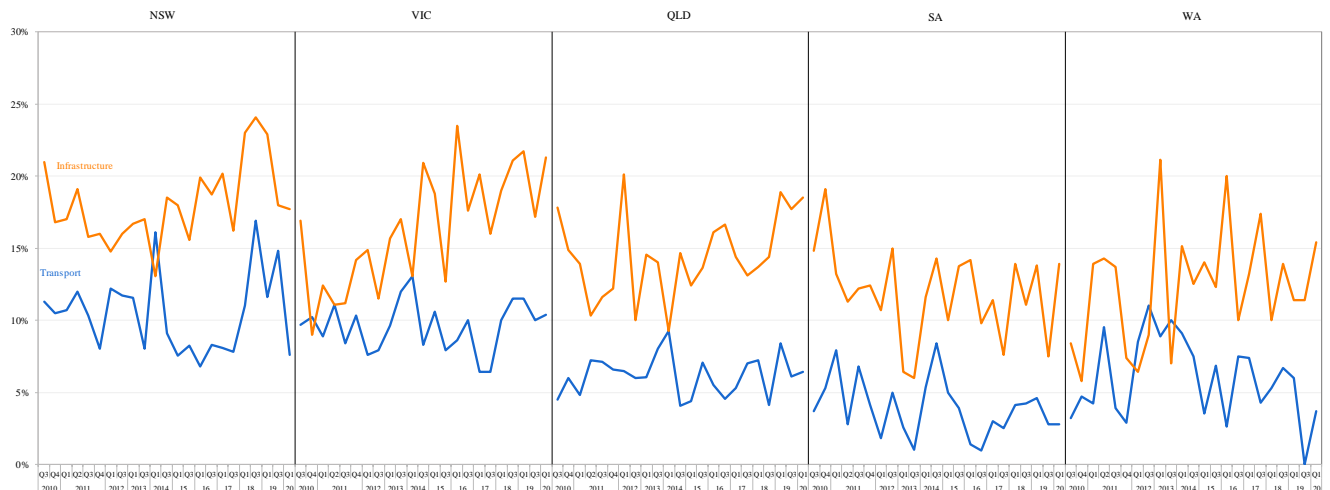
Issues selected as one of the top 2 priority issues in Australia, 2010 March - 2020 March



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 March 2020, 10% of Victorian residents nominated transport as a priority as compared to 3% of South Australian residents. There is a significant decrease in percentage of NSW residents nominating transport as one of Australian priority compared to September 2019 (8% as opposed to 15%), whereas an increase in Western Australian respondents nominating this issue (4% as opposed to 0%). In the other states, the proportion of residents nominating transport as one of the Australian priorities remained the same as September 2019.

Transport and infrastructure as highest priority issues by state, 2010 March - 2020 March



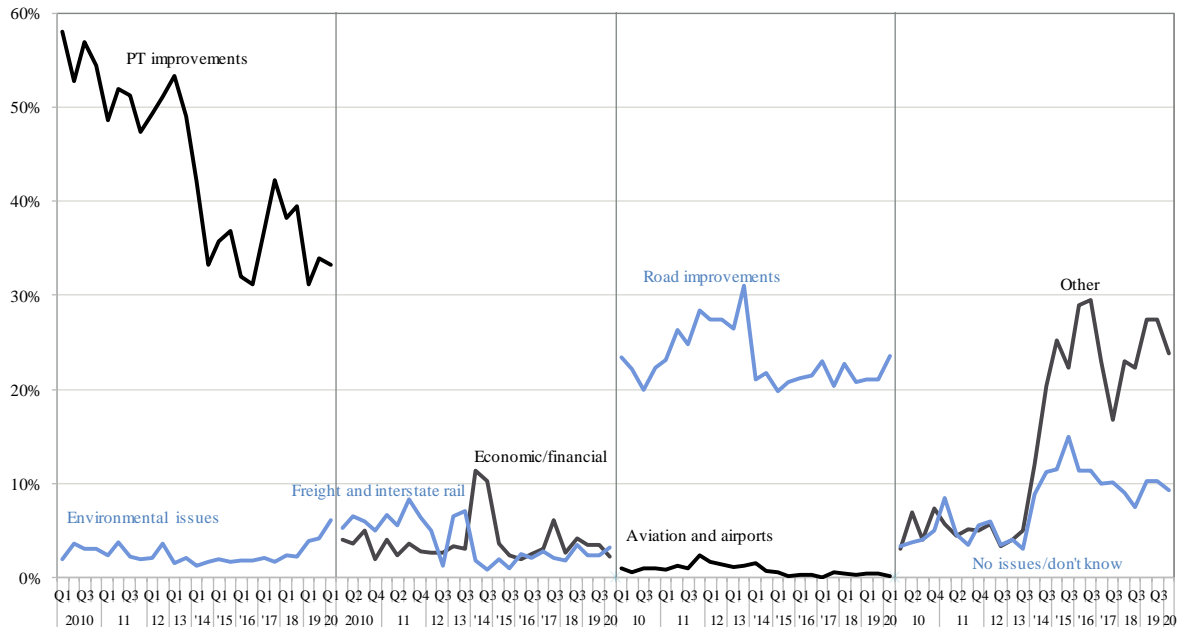


Highest priority issue for transport

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

- In the March 2020, 33% 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. 22% of Australians nominated each of 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.

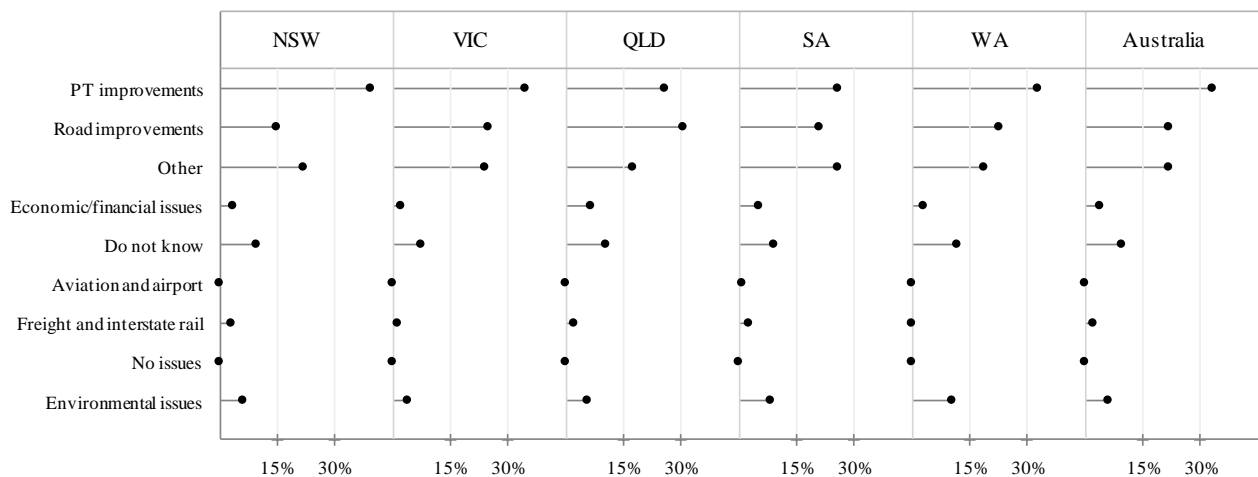
Highest priority transport issue in Australia, 2010 March - 2020 March



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 2020, most of states (except Queensland) regarded public transport improvements as the highest priority issue in transport. The percentage of New South Wales respondents regarding public transport improvements is the highest with 40%. Victorian and Western Australian respondents nominated road improvements as the second highest priority, followed by other issues, whereas New South Wales and South Australian residents nominated other issues as the second highest priority, followed by road improvements.

Highest priority transport issue by state, 2020 March



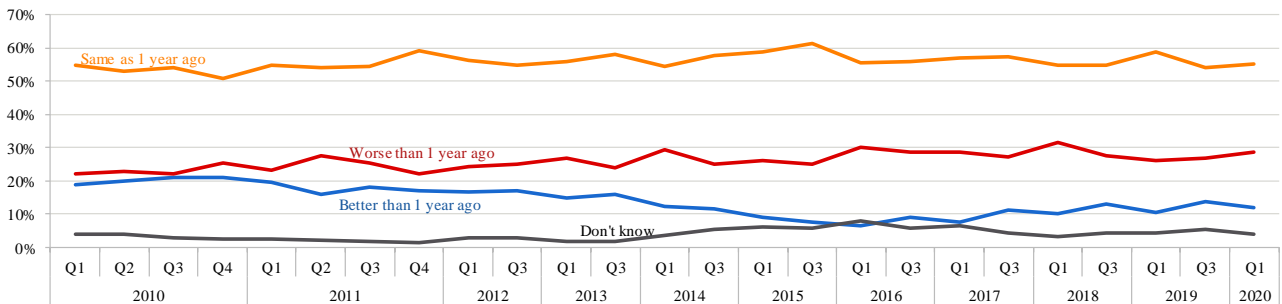


Local transport does not change

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?

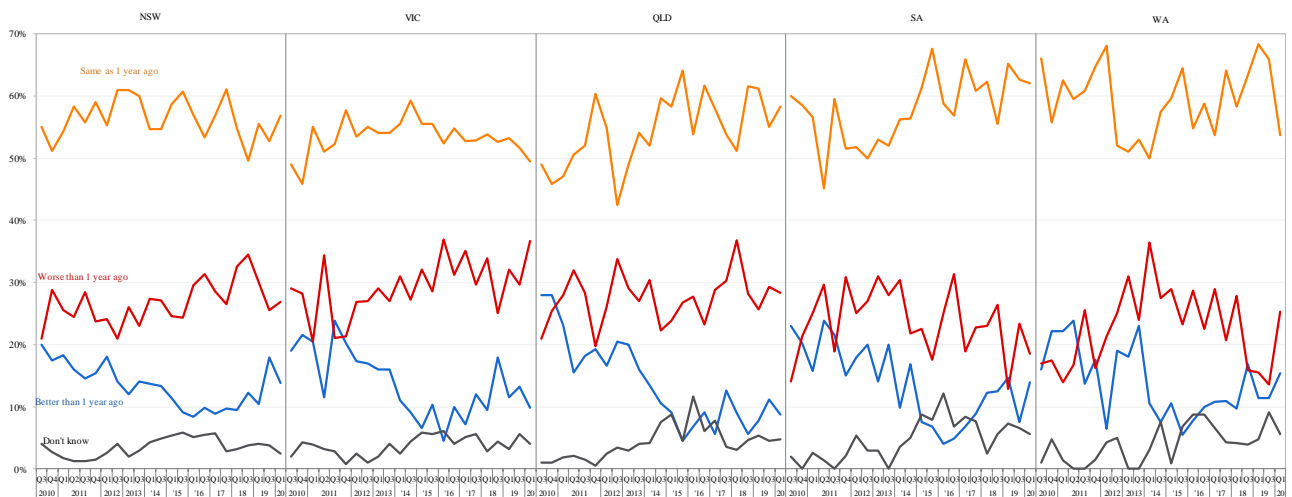
- In March 2020, only 12% of Australians believed that transport in their local areas is better now than one year ago, while 55% of Australians said it is the same as one year ago, and 29% of Australian said it is worse now than one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 March - 2020 March



- 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 a 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 South Australia and Western Australia increasing for this category. However, the proportion of residents thinking that transport becomes worse in their local area also increases in three out of five states, except Queensland and South Australia decreasing for this category.

Transport in local area compared to 1 year ago by state, 2010 March - 2020 March

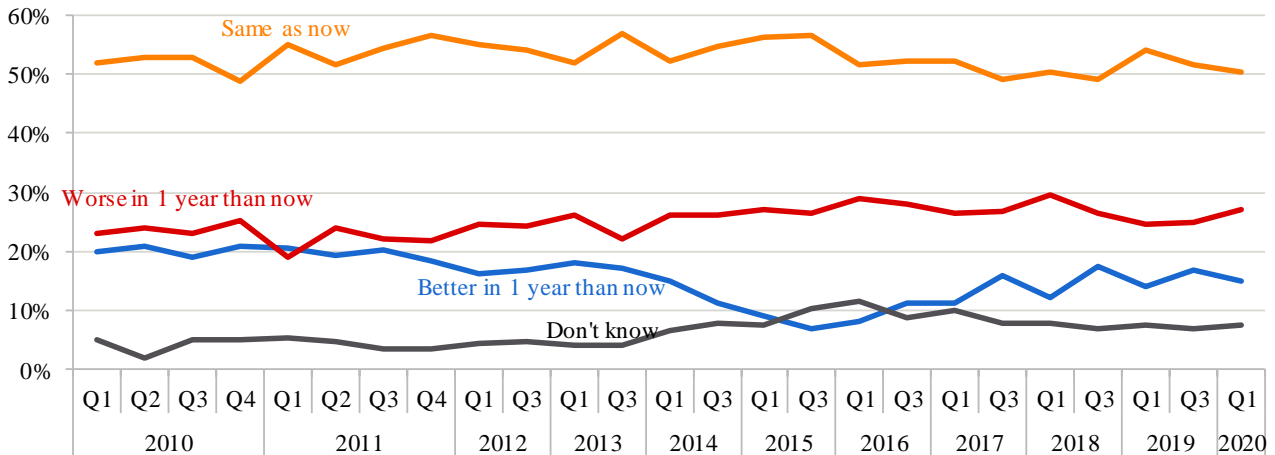




Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

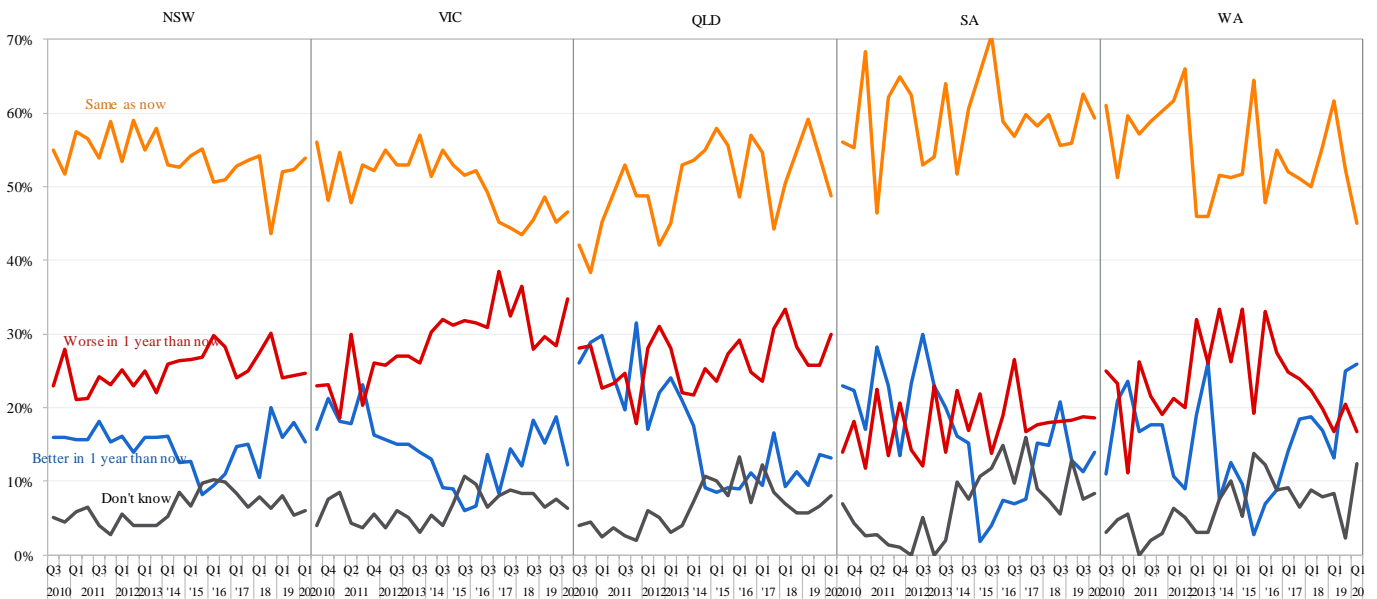
- In the March 2020, 50% of Australians said that transport in their local area will be the same in one year's time. 15% said transport will be better, slightly up from 14% in the March 2019 while 27% said transport will be worse, up from 24% in the March 2019.

Transport in local area in 1 year time across Australia, 2010 March - 2020 March



- 26% of Western Australian residents believed that transport in their local area will be better in one year's time; while 35% 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.

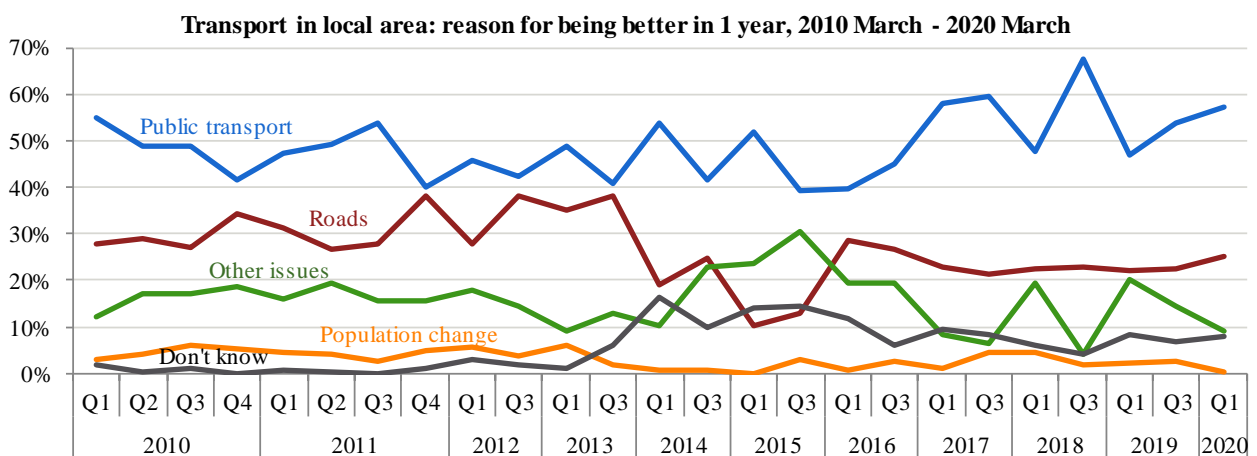
Transport in local area in 1 year time by state, 2010 March - 2020 March



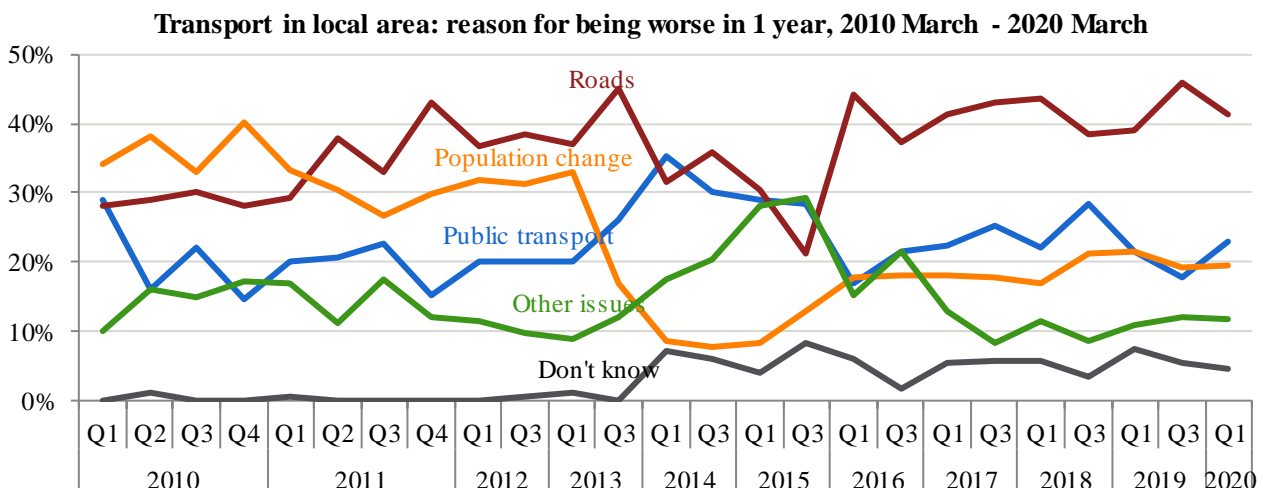


What were you thinking of most when answering that question [about transport in your local area in 1 years time?]

- 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 increased as the main reason for Australians to believe the transport becomes better in their local while roads decreased as the remarkable reason to think their local transport gets worse, as compared to last year. In addition to public transport and roads, other issues substantially decreased as the third main reasons for residents to believe that their local transport will be better in one year while population change remains the same as the third main reason to believe that their local transport will be worse in one year as compared to September 2019. The other issues, including economic and financial issues, government role in transport, and environmental issues, increased as the fourth reasons for local transport being 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.



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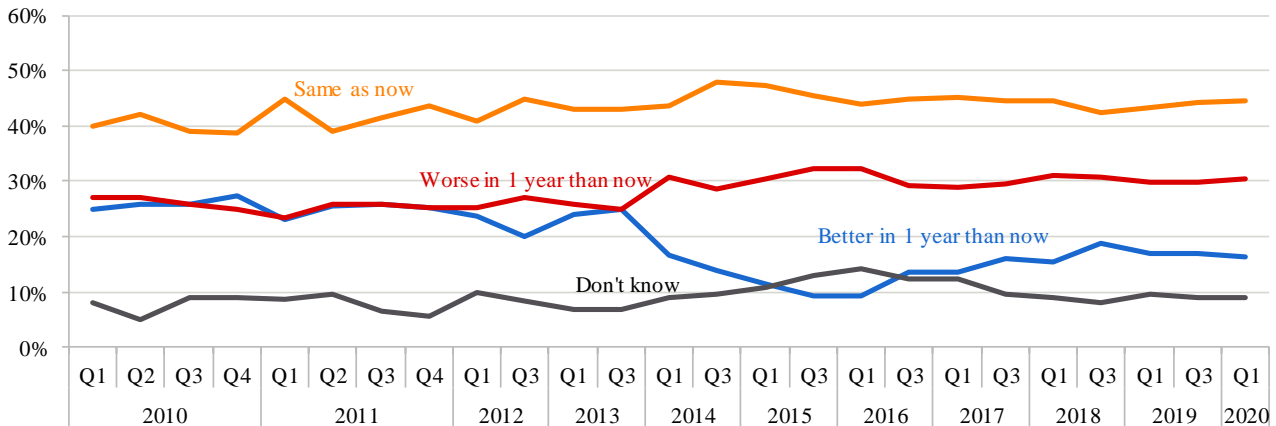


Confidence about transport is growing in Australia

Do you think that in 1 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?

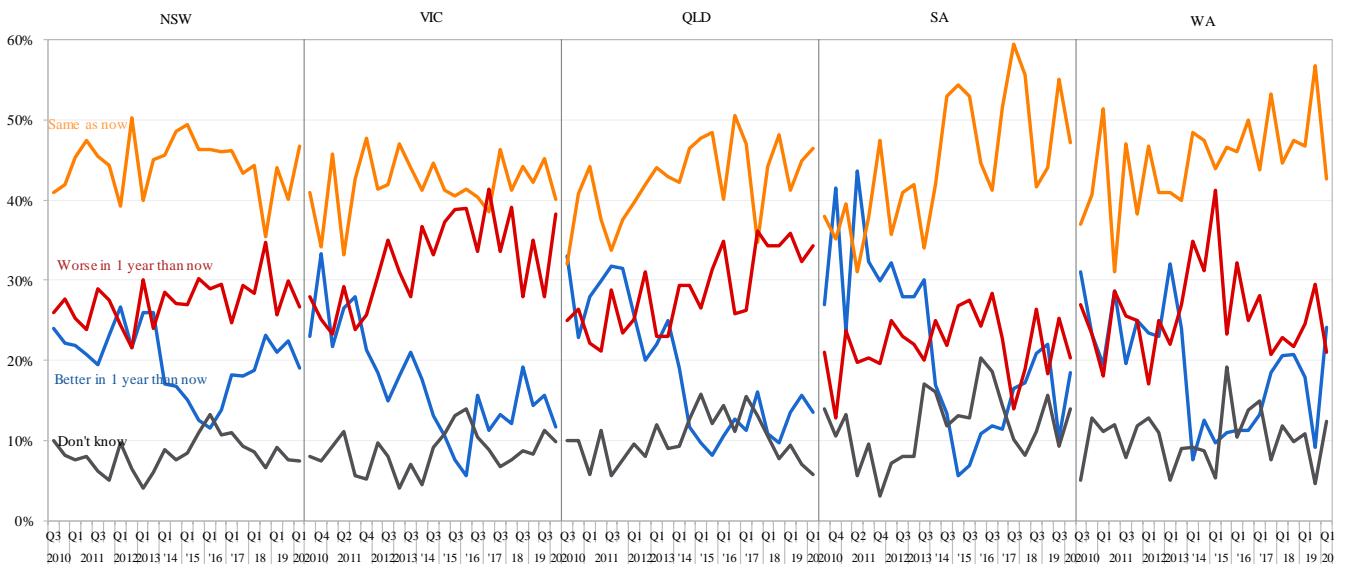
- In the March 2020, 45% of Australians said that transport in Australia in one year will be the same as now, with 16% of Australians saying that transport in Australia will be better in one year's time, slightly down from 17% in March 2019.

Transport in Australia in 1 year, 2010 March 2020 March



- In the March 2020, about 38% of Victorian residents and 34% of Queensland residents said that transport in Australia will be worse in one year, and 12% and 13% of these two states respectively said that it will be better. Western Australian residents are relatively more confident about transport in Australia in one year's time, as compared to other states, with 24% of their residents believing that transport in Australia will be better in one year's time and 21% 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 March - 2020 March

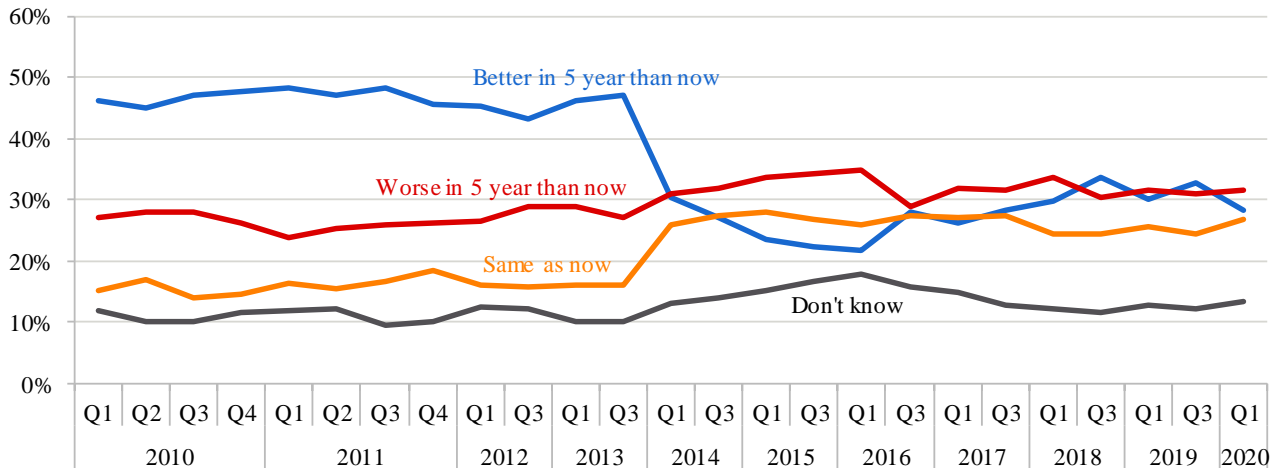




Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

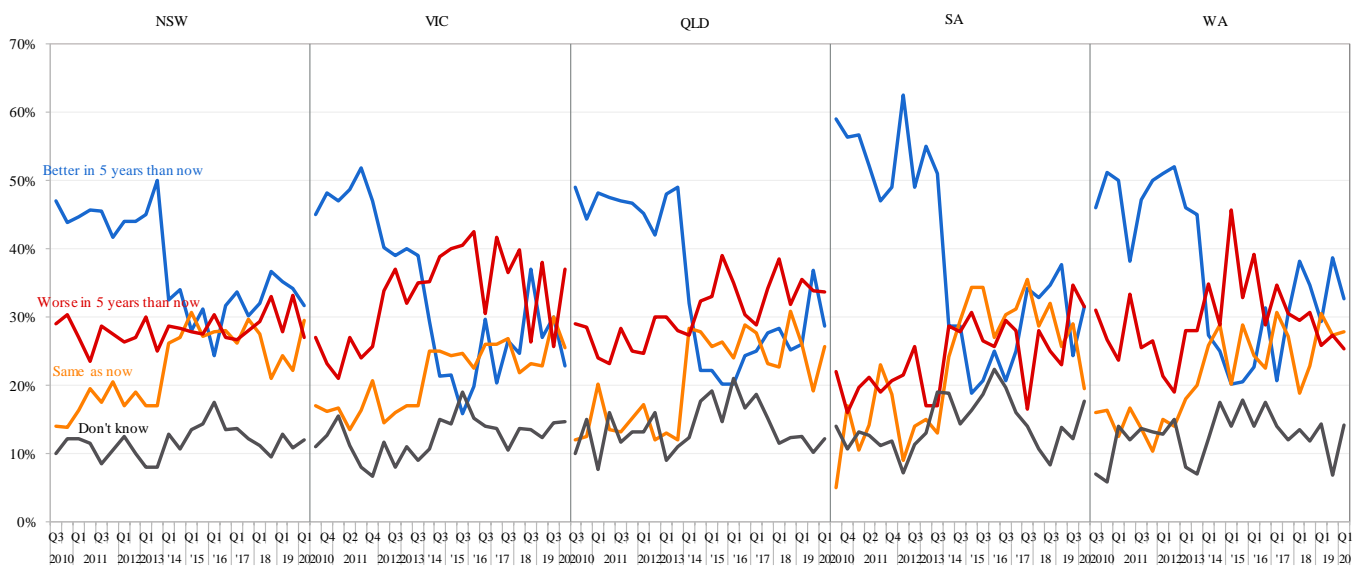
- Australians are slightly losing confidence that transport will be better in five years than it is now. In the March 2020, 28% of Australian residents believed transport in Australia will be better in five years, slightly down from 30% in March 2019. People believing that transport in Australia getting worse in five years' time remained the same compared to the March 2019.

Transport in Australia in 5 years, 2010 March - 2020 March



- In the March 2020, 33% of Western Australian residents believed that that transport in Australia will be better in five years time compared to now and 25% of their residents thought that Australian transport will be worse in five years' time, which is more confident than people living in the other states. In contrast, people living in Victoria are least confident, where 23% respondents said that transport in Australia will be better and 37% of their residents thought that Australian transport will be worse in five years' time.

Transport in Australia in 5 years by state, 2010 March - 2020 March





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.

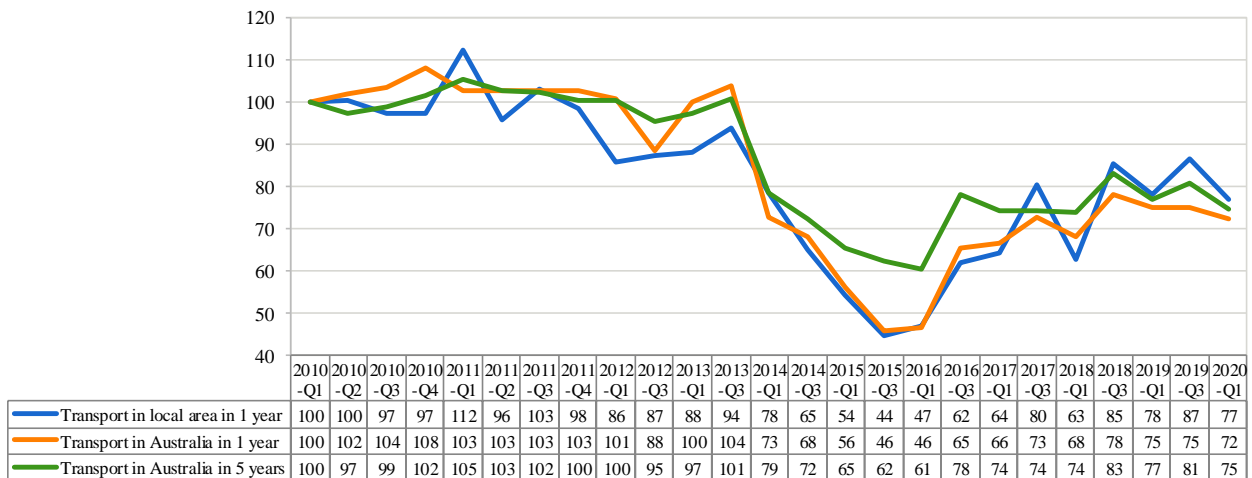
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2020 quarter as compared to the March 2019:

- Australians have become less 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 lost 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 2020 (Confidence index: from 100 to 77), less confident about transport in Australia in the next year (Confidence index: from 100 to 72), and less confident about transport in Australia in five years time (Confidence index: from 100 to 75). 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



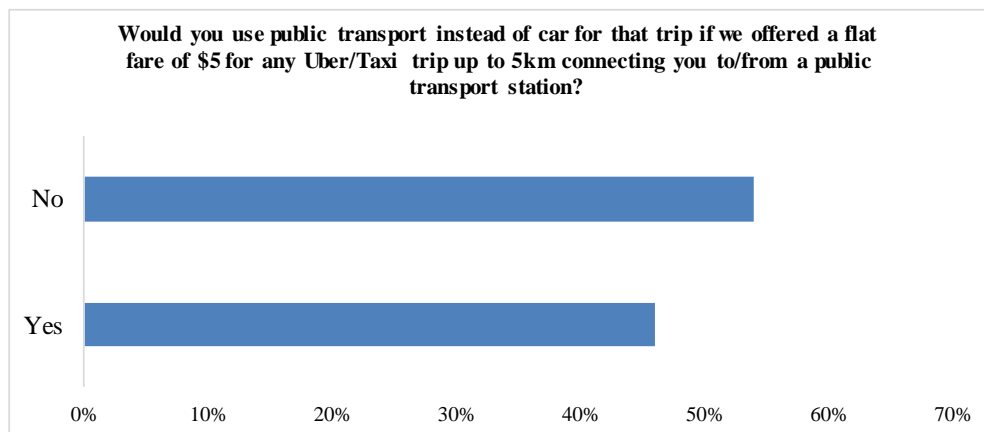


Supplementary questions on the willingness to replace car trips by public transport trips if being offered any 5\$ flat-fare Uber/Taxi for the trips up to 5kms from/to public transport stations and ranking the most important feature to improve public transport including travel time, frequency, fare level, crowding, and reliability.

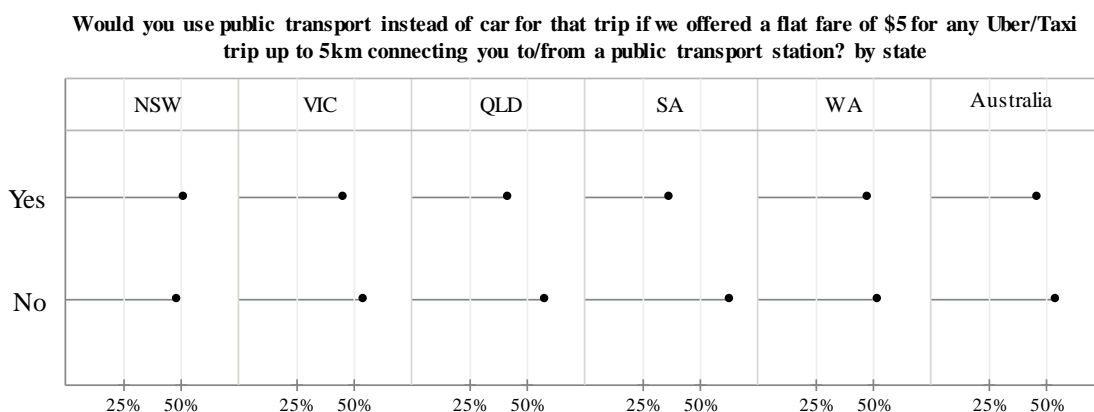
In the March 2020, two new questions were asked if Australian respondents would substitute public transport with car trips if they just paid a flat-fare 5\$ for any Uber/Taxi trip up to 5kms to take them from/to their places to/from public transport stations. They also were asked to rank each of the significant reasons to make public transport better among travel time, frequency, fare level, crowding, and reliability.

Thinking about a car trip that you do regularly, if we offered a flat fare of \$5 for any Uber/Taxi trip up to 5km you take to connect you to or from a public transport station, would you use public transport instead of car for that trip?

On average, 46% of Australian respondents supported the idea to use public transport instead of a private car if they can use Uber or Taxi to travel from/to public transport stations to/from their places and just need to pay flat fare 5\$ for such trips up to 5kms. The proportion of people not supporting this package is slightly higher.

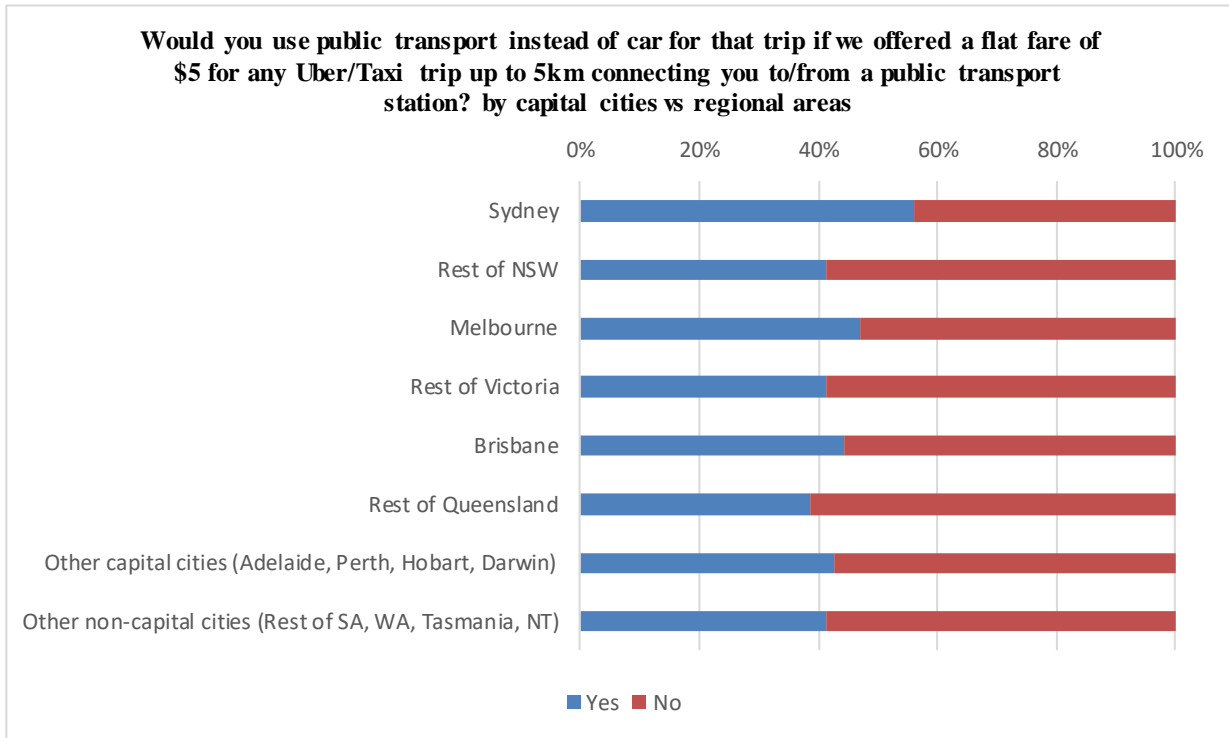


- NSW respondents are the most open to replace car trips with public transport trips if they just need to pay \$5 for all Uber/Taxi trips to/from a public transport station from/to their home (up to 5kms), with 51.2% of residents considering this plan.
- South Australia and other states (ACT, Tasmania, North Territory) are less agreeable to this package with 37% and 36% of their respondents considering this.





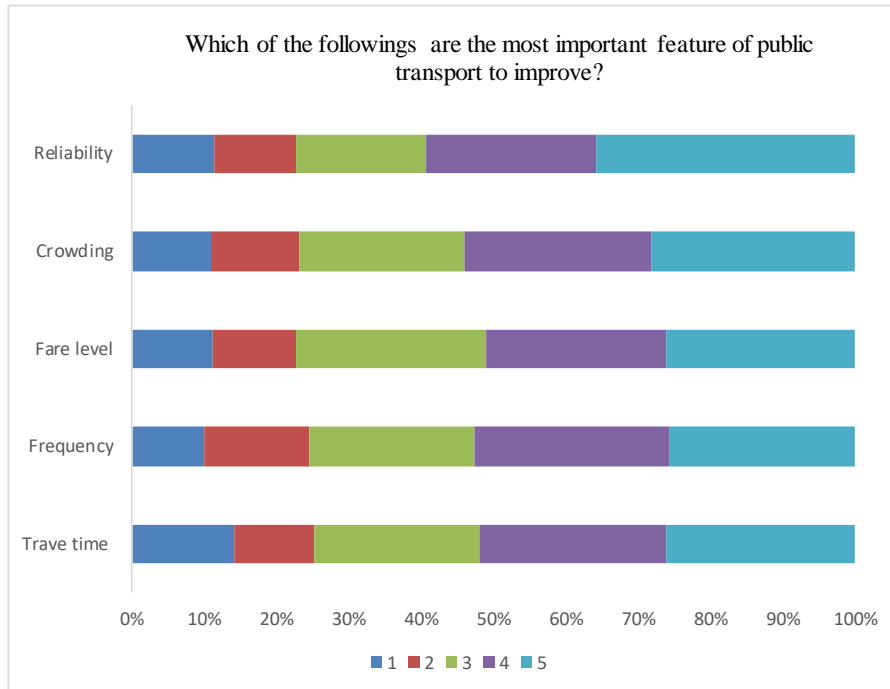
- Residents in capital cities such as Sydney, Melbourne and Brisbane are likely to support to replace public transport trips with private car trips if they are given an offer to pay a flat fare \$5 to travel from their place to a public transport hub with access and egress trips up to 5kms.
- Sydney sides are the most interested in this package with approximately 56% saying yes to this, whereas regional Queenslanders (rest of Queensland) are least likely to support this plan, with around only 39% supporting the proposal.





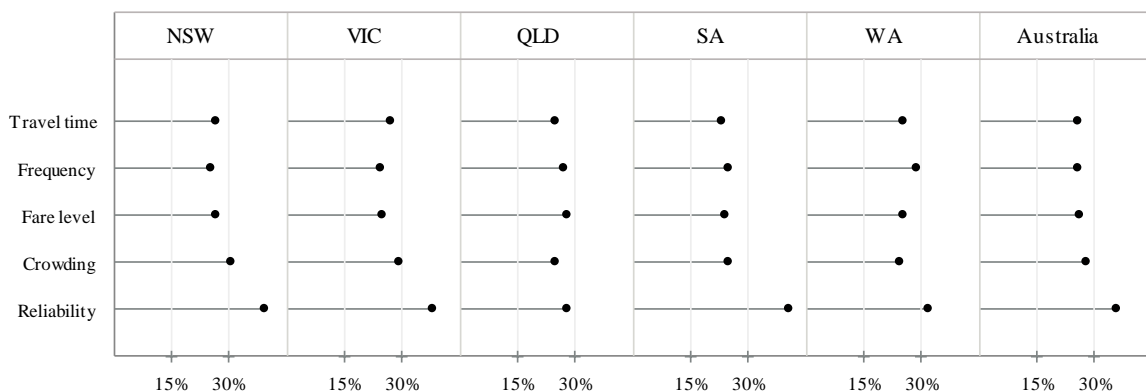
Which of the followings are the most important feature of public transport to improve, including travel time, frequency, fare level, crowding, and reliability? Please rank 1 to 5 only those that matter to you? (1: least important, 5: most important)

When asked about what the most important feature is in term of improving public transport, reliability has the highest percentage of Australian residents ranking it as the most important feature (score five) with approximately 36%, followed by crowding with about 28% for this category. Fare level, frequency and travel time are almost equally scored five as the most import reasons to improve public transport, with about 26%.



- Reliability is ranked as the most significant feature to improve in public transport in all states.
- Queenslanders considered fare level and reliability the most critical features with around 27% and 28%, respectively.
- Western Australian residents thought frequency of public transport services as the second most important factor to improve after reliability.
- Number of South Australian respondents voting for reliability outweigh those voting for the other four factors

Proportion of respondents scoring highest for each feature to improve public tranport by state





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
- March 2020: 26 February – 4 March 2020

More information

Visit the TOPS website for quarterly 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.

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