



THE UNIVERSITY OF
SYDNEY
—
Business School

Transport Opinion Survey (TOPS)

March 2021

Institute of Transport and Logistics Studies (ITLS)

Highlights

Note: This survey was conducted in March 2021. The multiple outbreaks of Covid-19 cases and snap lockdowns in different states in the last six months have shown a lagged negative impact on Australians' confidence to transport recovery, down from September 2020.

Infrastructure and transport slightly increased as the highest priority national issue

- In March 2021, 10% of Australians nominated infrastructure as one of Australia's two highest priority issues today, up from 9% in September 2020. In March 2021, 4% of Australians nominated transport as one of Australia's two highest priority issues today, identical to 4% in September 2020.

Public transport the highest priority for transport

- In March 2021, 29% of Australians said that the highest priority issue for transport in Australia is public transport improvements, down from 35% in September 2020. This is followed by other issues (21%) such as COVID-19 and road improvements (20%, up from 15% in September 2020). There are 4% more Australians who were not sure about the highest priority, up from 10% in September 2020.

Transport not changed in local areas

- In March 2021, 64% of Australians said that transport in their local areas is the same now as one year ago, up from 62% in September 2020.

A lower level of confidence about local transport in the short-term

- In March 2021, 15% of Australians said that transport in their local area would be better in one year's time, down from 18% in September 2020.

A lower level of confidence about transport in Australia in the short-term

- In March 2021, 17% of Australians think that transport in Australia will be better in one year's time, down from 20% in September 2020.

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

- In March 2021, 31% of Australians think that transport in Australia will be better in five years, down from 39% in September 2020.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in March 2021 Australians are less confident about transport in their local area (Confidence index: down from 100 to 90), and have less confidence across Australia in one-year time (Confidence index: down from 100 to 90), and in five years (Confidence index: down from 100 to 89).

Nearly 60% of Australians are not using public transport (PT)

- 21% of Australians said they would only consider PT once they and their family members get COVID-19 vaccines. 12% of Australians said they would not use PT again in a foreseeable future (1-2 years). Nearly 23% of Australians have never used PT.

The feeling of being safe in using public transport under COVID-19 varies by state

- Among all the states, Australians living in VIC and SA feel the least safe in using PT (5.8 and 6 out of 10). Australians living in WA feel the safest (6.9 out of 10). On average, Australians feel 6.2 out of 10 in terms of being safe in using PT under the current Covid-19 situation.

The return to using PT will be slow

- Overall, 24% of respondents have returned to using PT with 11% having never abandoned PT while 9% do not plan to use PT again in the next couple of years. An additional 13% will return to using PT once that are vaccinated. 36% of the sample have never used PT.

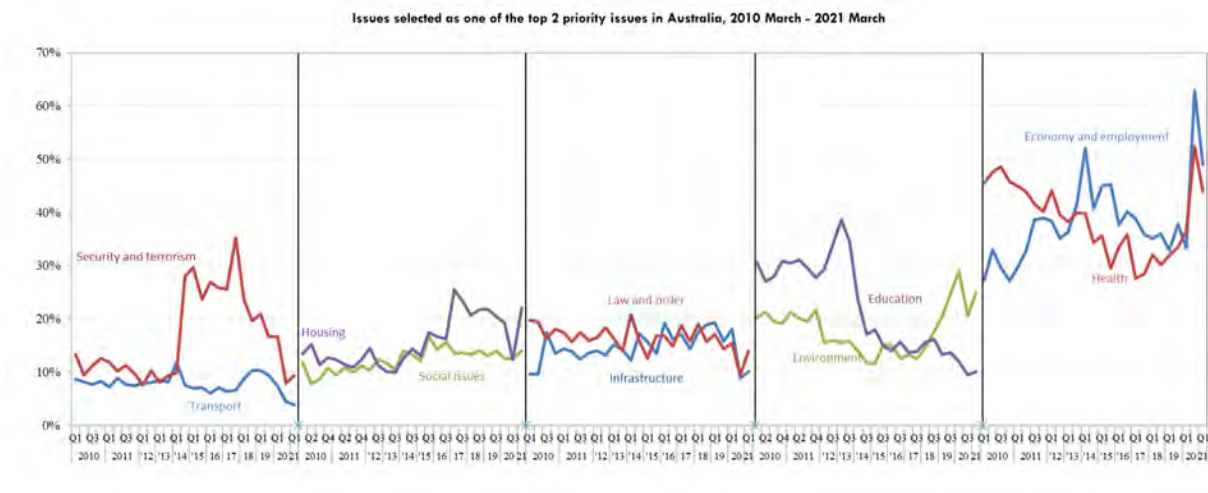
About the Transport Opinion Survey

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. The survey methodology was changed to an online survey from the March 2014, using an online panel. The March 2020 survey was conducted between 4 March and 14 March 2021. This report is based on the data from 1023 completed responses.

Transport as a national priority

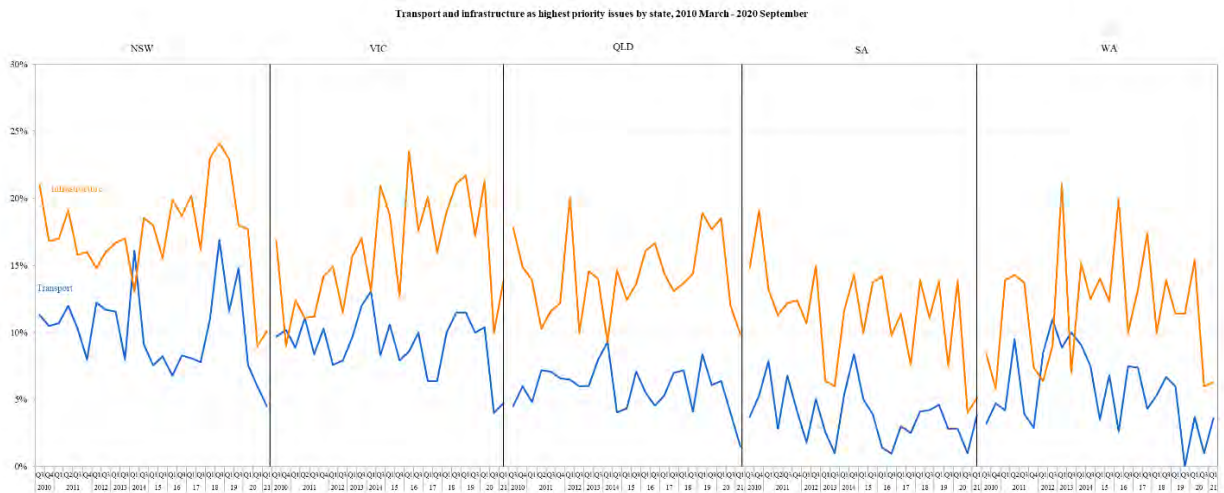
Which two of these issues do you think are the highest priority in Australia today?

- In March 2021, the priority that increased most from the September 2020 survey is housing, up from 12% to 22% nominated by Australians. The economy and employment remain the highest priority at 49% but is down from 63% in September 2020. Health is the second-highest priority at 44% but down from 52% in September 2020. Australians are increasingly more concerned about the environment at 25%, up from 21% in September 2020. Concerns on law and order and social issues have increased, from 9% to 14% and 12% to 14%. These significant changes suggest that the pandemic's impact has deepened and goes beyond influencing the economy and jobs and starts to show in other aspects of life such as housing, law and social issues.
- 10% of Australians nominated infrastructure, and 4% nominated transport as one of Australia's two highest priority issues today.



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 2021, 5% of New South Wales residents nominated transport as a priority as compared to 2% of Queensland residents. 14% of Victorians nominated infrastructure as one of priorities as compared to 5% of South Australian residents and 6% of Western Australian residents. There are slight increases in the percentage of residents of most states nominating infrastructure and transport as one of priority compared to September 2020.

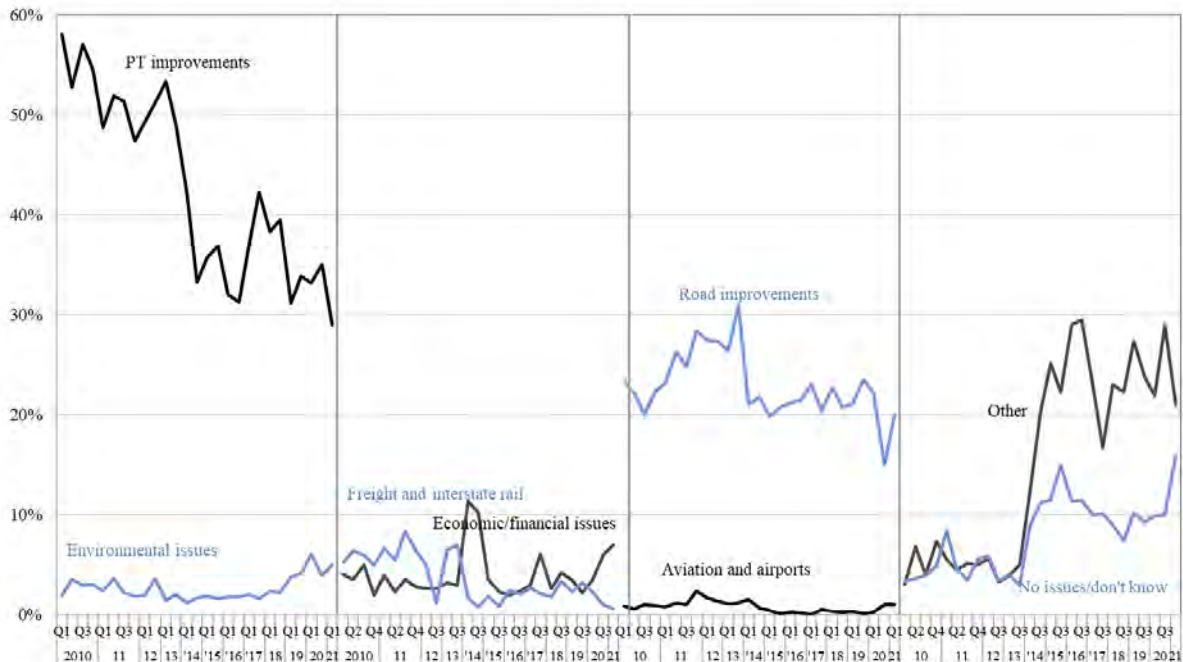


Highest priority issue for transport

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

- In March 2021, 29% of Australians said that the highest priority issue for transport in Australia is public transport improvements (down from 35% in September 2020). Public transport has been the highest priority transport issue since the beginning of this survey in 2010. 21% of Australians nominated other issues, such as security and terrorism and safety issues associated with the transport system, as the next highest priority issues for transport in Australia, followed by road improvements (20%, up from 15% in September 2020).

Highest priority transport issue in Australia, 2010 March - 2021 March

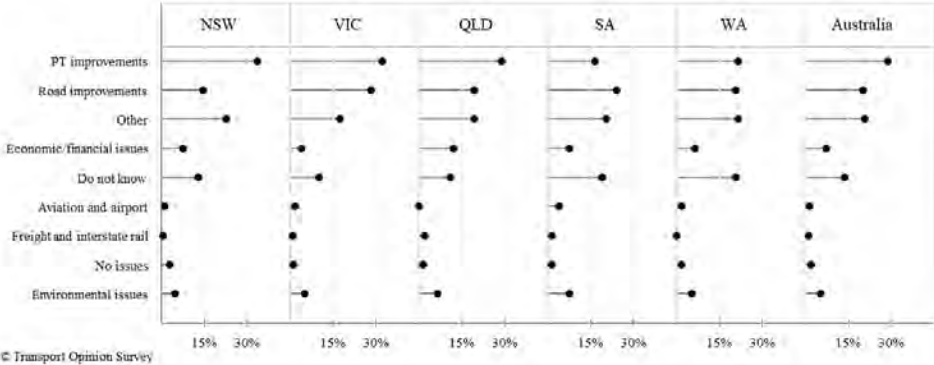


Note: percentages add up to 100% in each quarter. "Other" includes responses about transport in general, responses about both public transport and roads, issues not included in other categories such as terrorism, and rebuilding transport after disasters.

- In March 2021, most of states (except South Australia) regarded public transport improvements as the highest priority issue in transport, followed by other issues and road improvements. The percentage of New South Wales respondents regarding public transport improvements is the highest with 34%, followed by

Victorian respondents at 29%. South Australian respondents nominated road improvements as the highest priority with 24%. Road improvements increased across states as the priority.

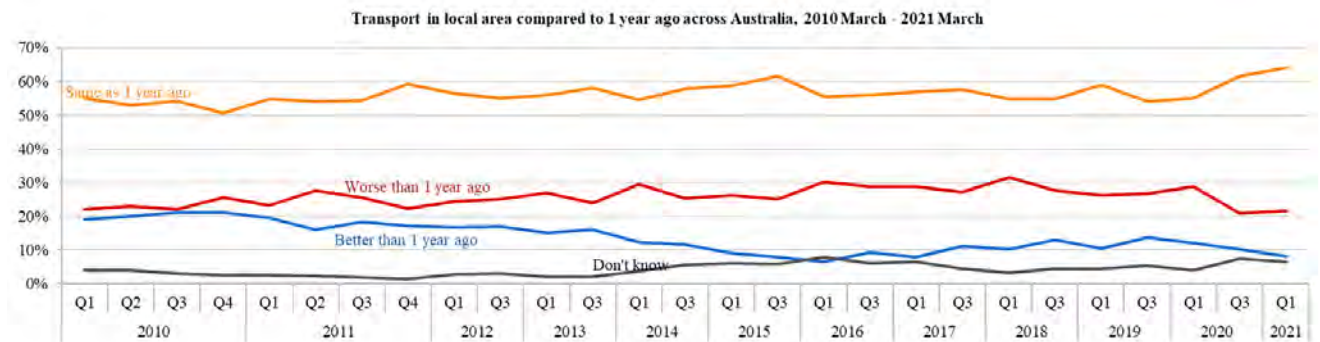
Highest priority transport issue by state, 2021 March



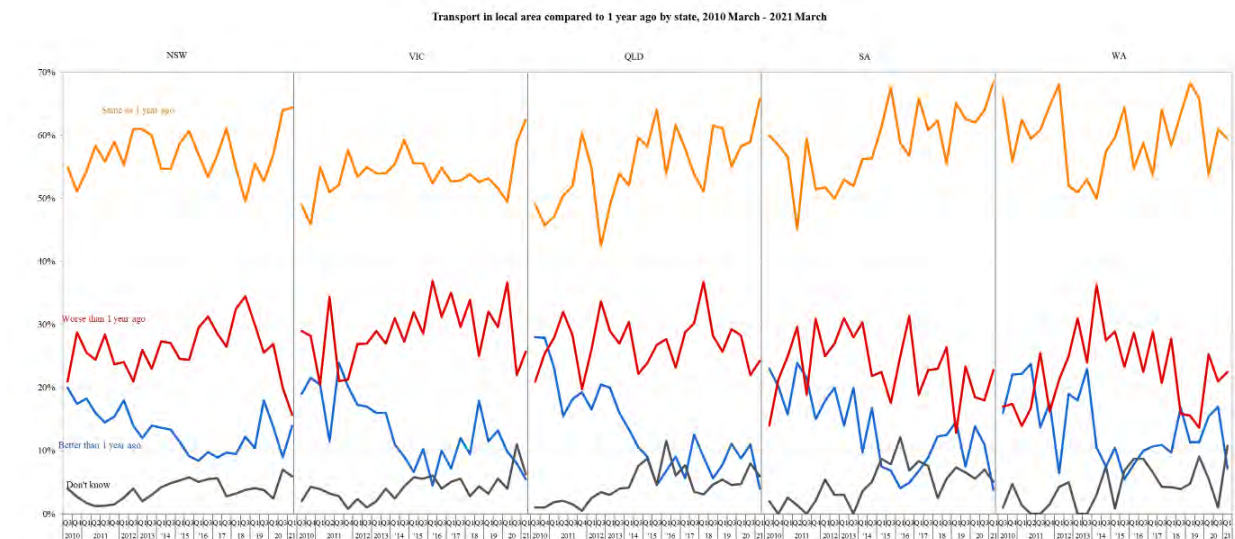
Local transport is slightly worse and people's confidence is declining except in NSW

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 2021, only 8% of Australians believed that transport in their local area is better now than one year ago (down from 10%), while 64% of Australians said it is the same as one year ago (up from 62%), and 22% of Australian said it is worse now than one year ago (up from 21%). These numbers are close to the results in September 2020.



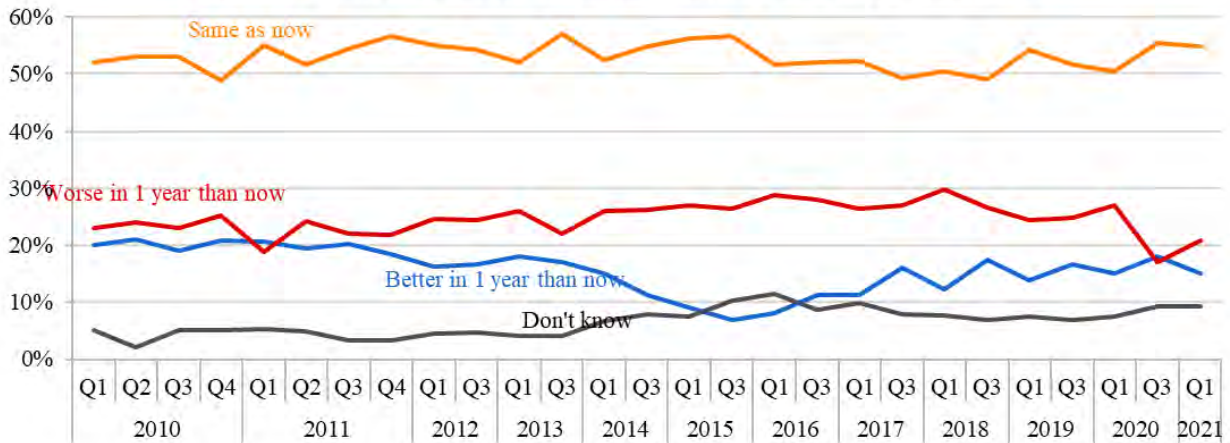
- The evaluation of transport in the local area by respondents is not consistent in all states of Australia. In NSW, respondents were more optimistic with 7% more people identifying it as better or same as one year ago. In other states, the percentage of respondents responding that transport in their local area is worse than one year ago has increased, most significantly in SA (23%, up from 18%), followed by VIC (26%, up from 22%). The proportion of residents thinking that transport becomes better in their local area has greatly decreased in most states except NSW, with WA recorded the biggest drop from 17% in September 2020 to 7% in March 2021, followed by QLD and SA, with a drop from 11% to 4%.



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?

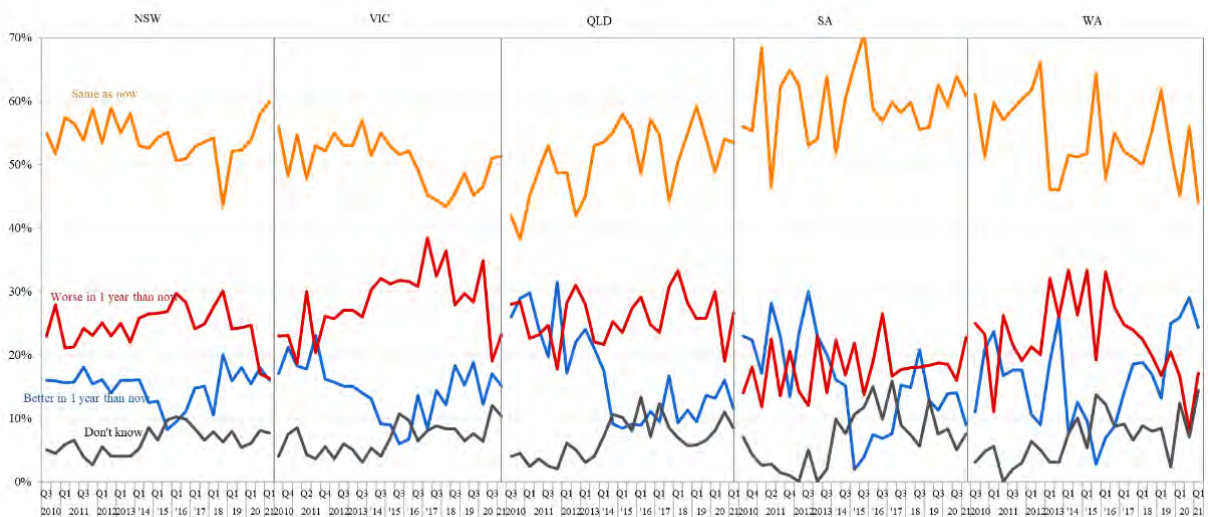
- In March 2021, 55% of Australians said that transport in their local area will be the same in one year's time. 15% said transport will be better, down from 18% in September 2020 while 21% said transport will be worse, up from 17% in September 2020.

Transport in local area in 1 year time across Australia, 2010 March - 2021 March



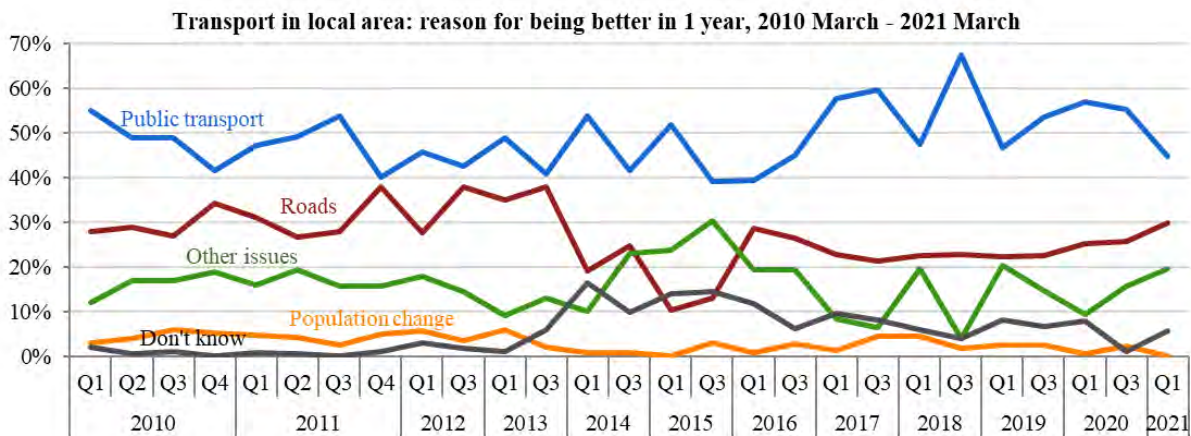
- In almost all states, Australians have responded with either slightly less or less confidence to transport in their local area in one year's time. With the biggest drop of confidence recorded in WA (17% chose "worse in one year's time", up from 8% in September 2020), followed by QLD (27% chose "worse in one year's time", up from 19%) and SA (23% chose "worse in one year's time", up from 16%). Australians living in NSW and VIC remain relatively unchanged in their views compared to September 2020, with more choosing "same in one year's time".

Transport in local area in 1 year time by state, 2010 March - 2021 March

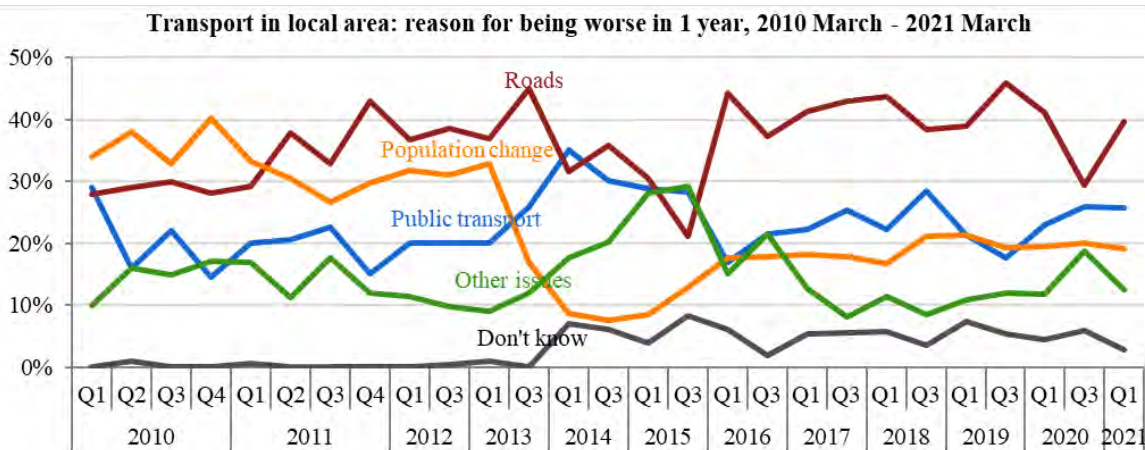


What were you thinking of most when answering that question [about transport in your local area in 1 years time?

- 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 decreased as the main reason for Australians to believe the transport becomes better in their local while roads significantly increased 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 increased compared to September 2020 and remain as the third main reasons for residents to believe that their local transport will be better in one year while population change is not the reason to believe that their local transport will be better in one year but is the main reason to believe that it will be worse. The other issues, including economic and financial issues, government role in transport, and environmental issues, increased as the third reasons for local transport being better.



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.

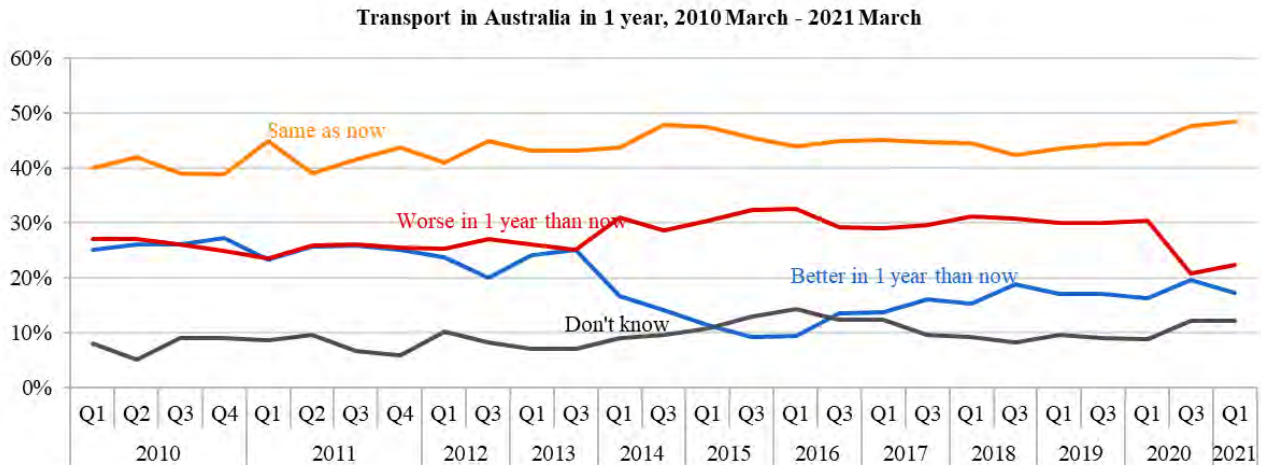


Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

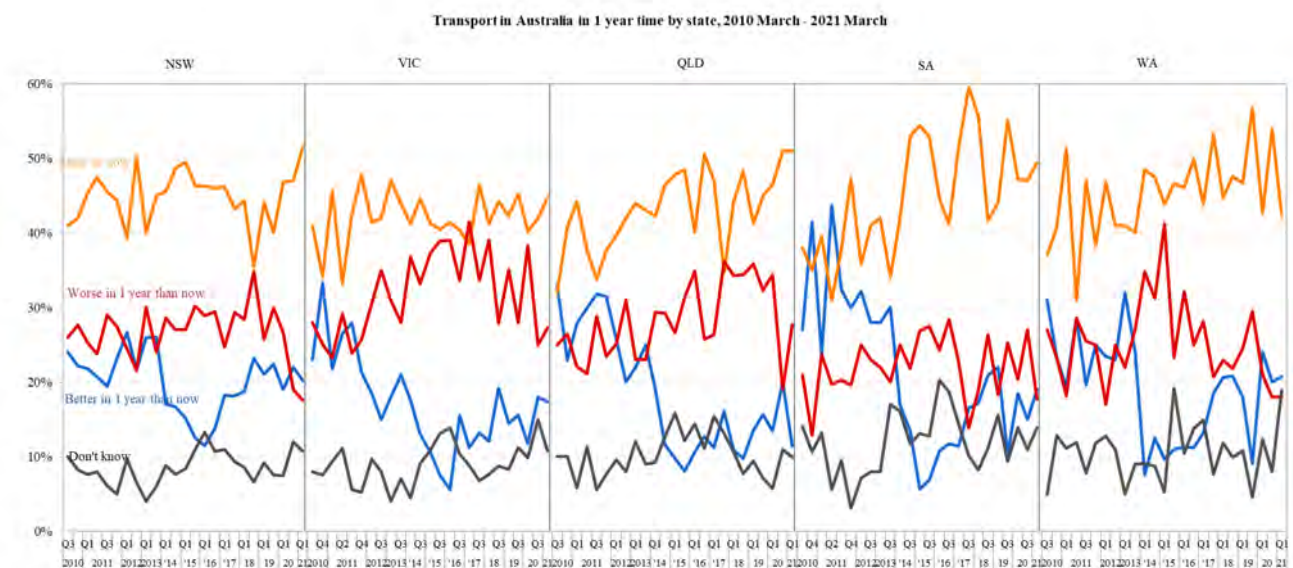
Confidence about transport in Australia is slightly worse in the short-term but is much worse in the long-term

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 March 2021, 48% 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, down from 20% in September 2020.



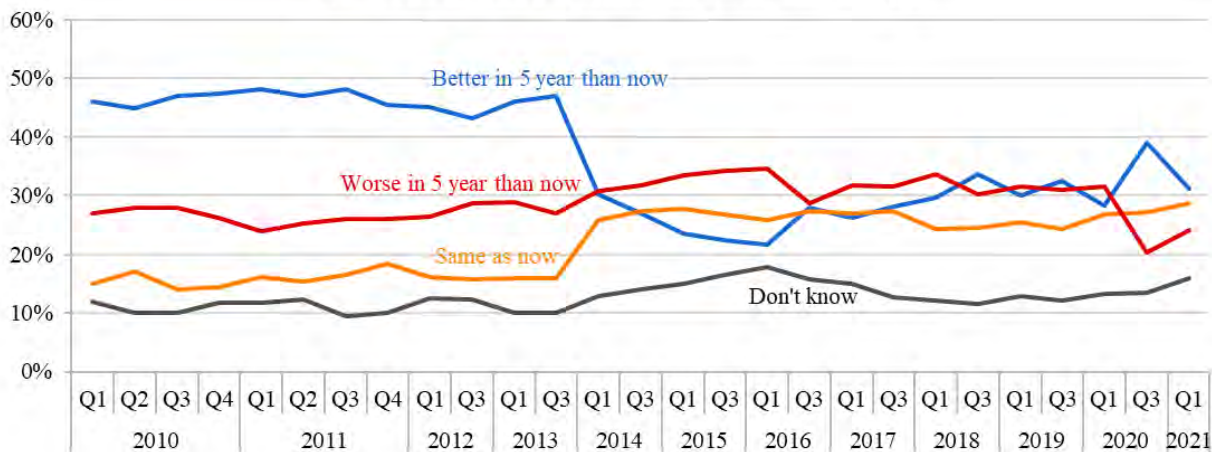
- In March 2021, about 28% of QLD residents said that transport in Australia will be worse in one year, up from 19% in September 2021. In NSW and VIC, this percentage remains close to that in September 2020. SA residents are much more confident about transport in Australia in one year's time, as compared to other states, with 19% of their residents believing that transport in Australia will be better in one year's time (up from 15% in September 2020) and 18% of the residents thinking that Australian transport will be worse in one year's time (down from 27% in September 2020).



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?

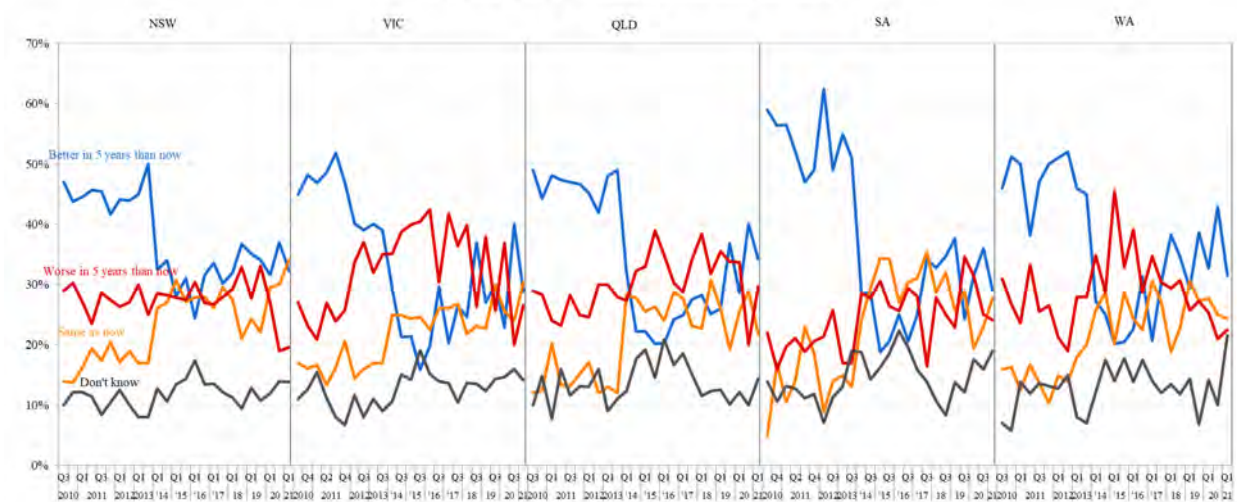
- Australians are significantly less confident that transport will be better in five years than it is now. In March 2021, 31% of Australian residents believed transport in Australia will be better in five years, down from 39% in September 2020. People believing that transport in Australia will be getting worse in five years' time, increasing to 24% compared to 20% in September 2020.

Transport in Australia in 5 years, 2010 March - 2021 March



- In March 2021, the proportions of Australian residents in VIC and QLD believing that transport in Australia will be worse in five-years time increased to 27% (up from 20%) and 30% (up from 20%) compared to September 2020. NSW residents believing that transport will be better also decreased from 37% to 32%. WA residents believing that transport will be better also decreased significantly from 43% in September 2020 to 32% in March 2021. Australians across all states are losing long-term confidence about transport.

Transport in Australia in 5 years by state, 2010 March - 2021 March



Change in confidence over time – TOPS Index

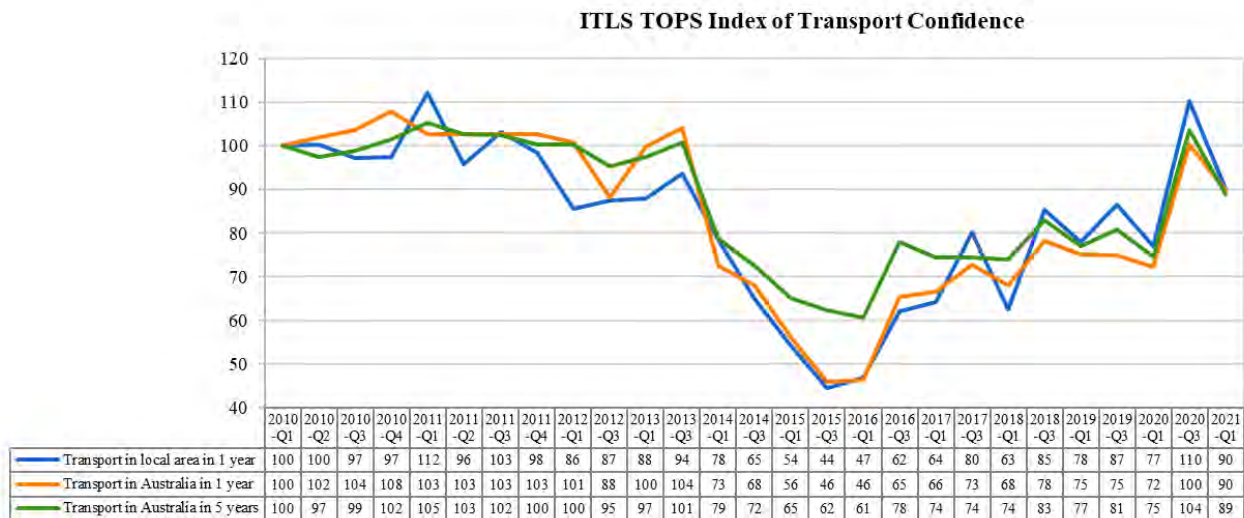
Responses from the first Transport Opinion Survey about transport becoming better or worse are used to set an index of 100 in quarter 1, March 2010. In each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia 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 2021 quarter as compared to the September 2020:

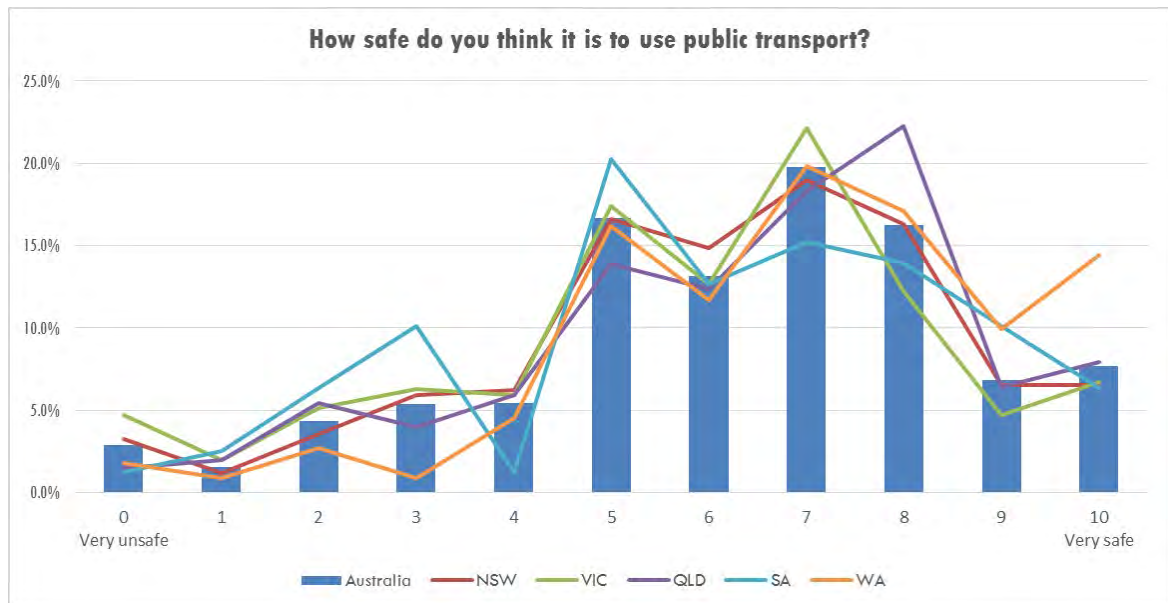
- Australians have become remarkably less confident about improvements in transport in their local area in one year's time.
- Australians have become much less confident about improvements in transport in Australia in one year's time.
- Australians have much less confident about improvements in transport in Australia in five years' time.

Compared to the launch of TOPS in March 2010, Australians are less confident about improvements in transport in their local area in March 2021 (Confidence index: from 100 to 90) and in the next year (Confidence index: from 100 to 90), and less confident about improvements in transport in Australia in five-years time (Confidence index: from 100 to 89). There has been a very strong decline in confidence since September 2020 but still much better than the start of the pandemic in March 2020, showing a legged negative impact of multiple outbreaks of COVID-19 cases and snap lockdowns in different states in the past six months.



Supplementary questions in March 2021

- Among all the states, Australians living in VIC and SA feel the least safe in using PT (5.8 and 6 out of 10). Australians living in WA feel the safest (6.9 out of 10). On average, Australians feel 6.2 out of 10 in terms of being safe in using PT under the current Covid-19 situation.

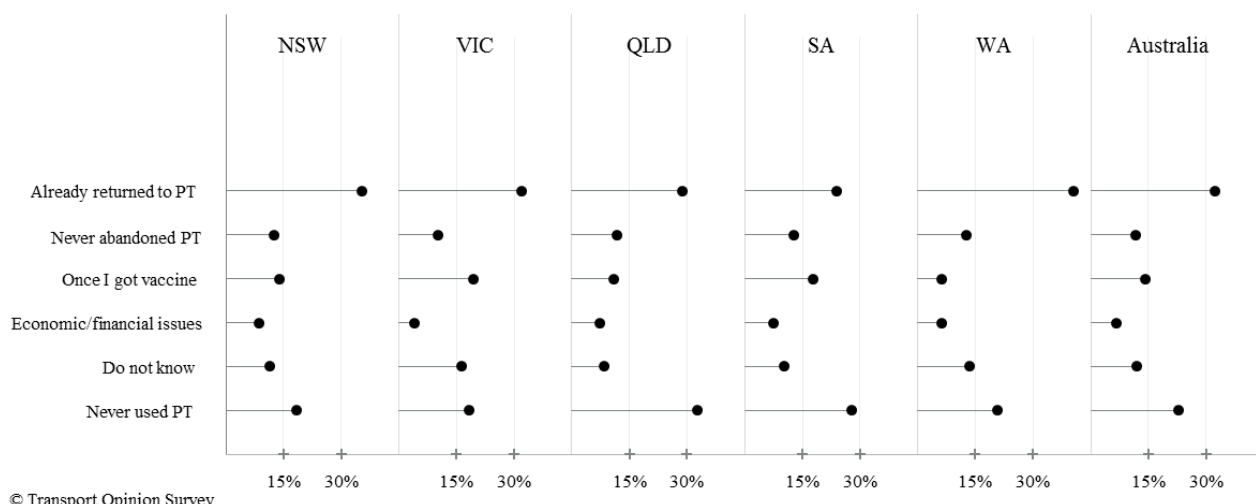


	Australia	NSW	VIC	QLD	SA	WA	Other
Mean	6.17	6.11	5.81	6.36	6.00	6.87	6.42
Std.Error	0.07	0.13	0.16	0.16	0.27	0.21	0.32

- Overall, 24% of respondents have returned to using PT with 11% having never abandoned PT while 9% do not plan to use PT again in the next couple of years. An additional 13% will return to using PT once that are vaccinated. 36% of the sample have never used PT.

As Australia rebounds back, when would you use public transport again?

When would people use public transport after Covid-19? - 2021 March



	Total	NSW	VIC	QLD	SA	WA	Other
I have already returned to public transport	32.4%	35.3%	32.0%	28.7%	24.1%	40.5%	24.4%
I have never abandoned public transport	11.8%	12.5%	10.3%	11.9%	12.7%	12.6%	11.1%
Once I got COVID-vaccine	14.1%	13.9%	19.4%	10.9%	17.7%	6.3%	13.3%
Once all of my household members got COVID-vaccines	6.8%	8.6%	4.0%	7.4%	7.6%	6.3%	6.7%
I will not use public transport again in a foreseeable future (1-2 years)	12.0%	11.3%	16.2%	8.4%	10.1%	13.5%	8.9%
I have never used public transport, irrespective of COVID-19	22.9%	18.4%	18.2%	32.7%	27.8%	20.7%	35.6%

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
- September 2020: 31 August – 3 September 2020
- March 2021: 4 March – 14 March 2021

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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