

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

Quarter 1, March 2017

**Highlights**

**Infrastructure remains the same while transport decreases as the highest priority national issue**

- In the March 2017 quarter, 17% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, down from 19% in March 2016. In the March 2017 quarter, 6% of Australians nominated transport as one of the two highest priority issues in Australia today, the same as in March 2016.

**Public transport the highest priority for transport**

- In the March 2017 quarter, 37% of Australians said that the highest priority issue for transport in Australia is public transport improvements, up from 32% in March 2016. This is followed by road improvements (23%) and other issues (23%).

**Transport not changed in local areas**

- In the March 2017 quarter, 57% of Australians said that transport in their local areas is the same now as one year ago, about the same as in the March 2016 quarter.

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

- In the March 2017 quarter, 11% of Australians said that transport in their local areas will be better in one year's time, slightly up from 8% in the March 2016 quarter.

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

- In the March 2017 quarter, 14% of Australians think that transport in Australia will be better in one year's time, up from 9% in the March 2016 quarter.

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

- In the March 2017 quarter, 26% of Australians think that transport in Australia will be better in five years, slightly up from 22% in the March 2016 quarter.

**ITLS Index of Transport Confidence**

- Compared to the launch of TOPS in March 2010, in March 2017 Australians are less confident about transport in their local area (Confidence index: down from 100 to 64), and across Australia in one year time (Confidence index: down from 100 to 66), and in five years (Confidence index: down from 100 to 71).

**54% of respondents think that major accidents happen less than once every 3 months**

- On average, around 54% of respondents think that major accidents happen on their regular travel routes less than once every three months.

**In almost four out of five cases, toll payers are car drivers themselves when using toll roads**

- Overall, 79% Australian residents reported that the car driver pays for the tolls when traveling by car.

**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 2017 survey was conducted between 2 and 13 March 2017. This is also the third wave of the longitudinal panel survey launched in March 2015. This report is based on the data from 1,478 completed responses, including 1035 repeated samples from the last Wave and 443 fresh samples. Current issues in this

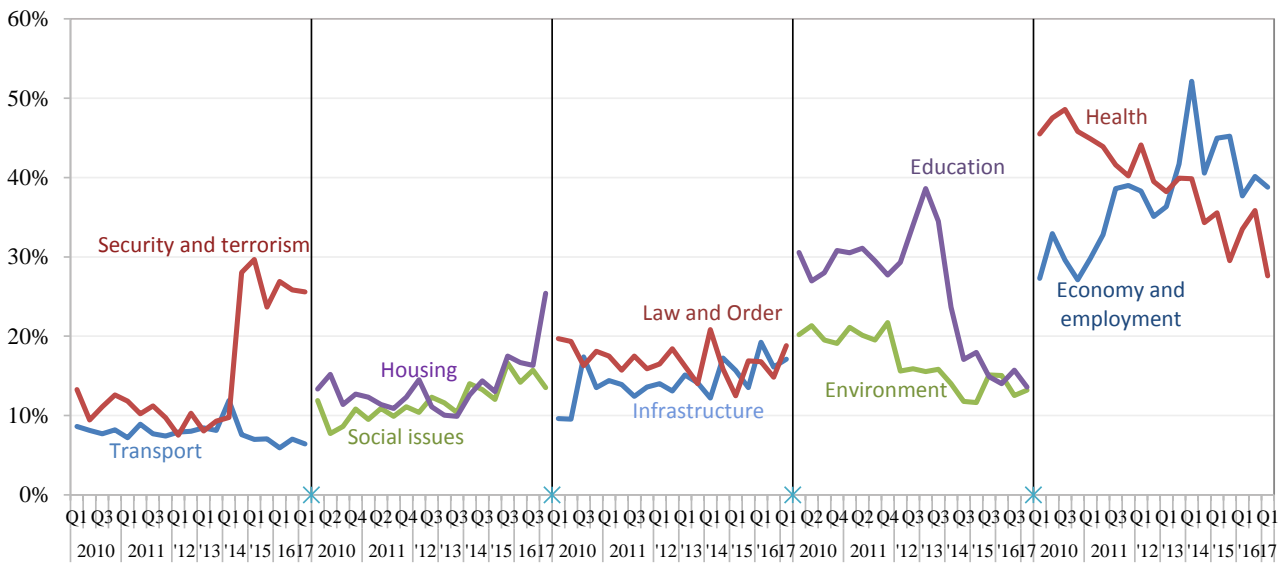
quarter included asking Australian residents on how often major accidents occur on their regular travel routes and which person in the car pays the toll when using toll roads.

**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 2017, the economy and employment continued to show up as the highest priority issue in Australia, nominated by 39% of Australians, followed by health (28%). There is a significant increasing concern about housing (25%) since March 2010. Australians are concerned and well informed about security and terrorism issues, which continued to be nominated as one of the top two priority issues in Australia by many respondents in this quarter (26%).
- 17% of Australians nominated infrastructure and 6% 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 - 2017 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 2017, 8% of NSW residents nominated transport as a priority as compared to 3% of South Australian residents.

**Transport and infrastructure as highest priority issues by state, 2010 Q3 - 2017 Q1**

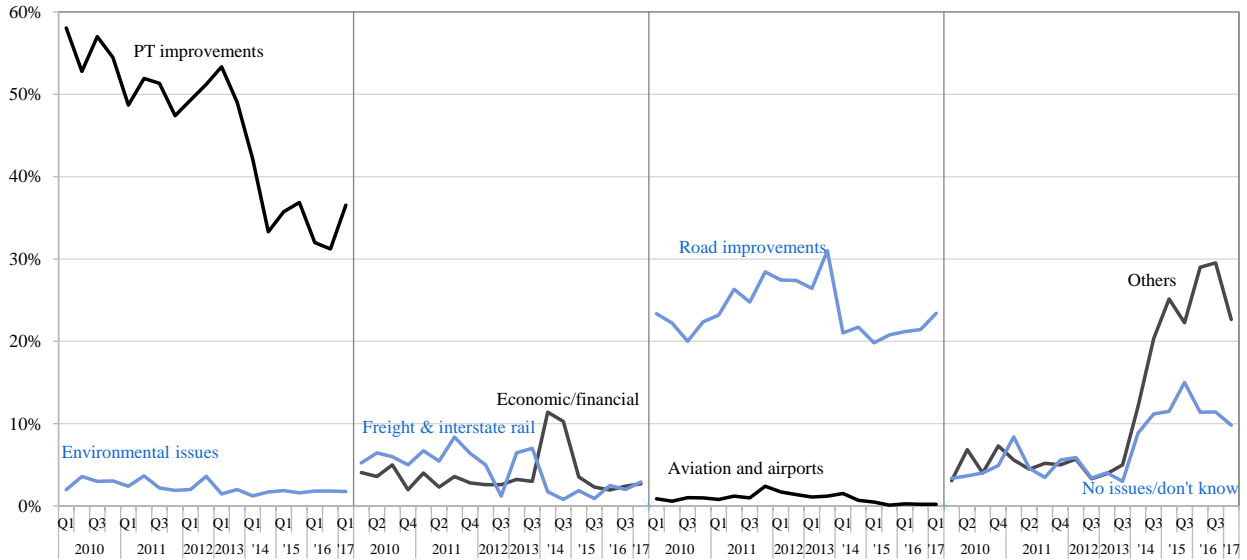


**1. Highest priority issue for transport**

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

- In the March 2017 quarter, 37% 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. 23% of Australians nominated each of road improvements and other issues as the second highest priority issues for transport in Australia.

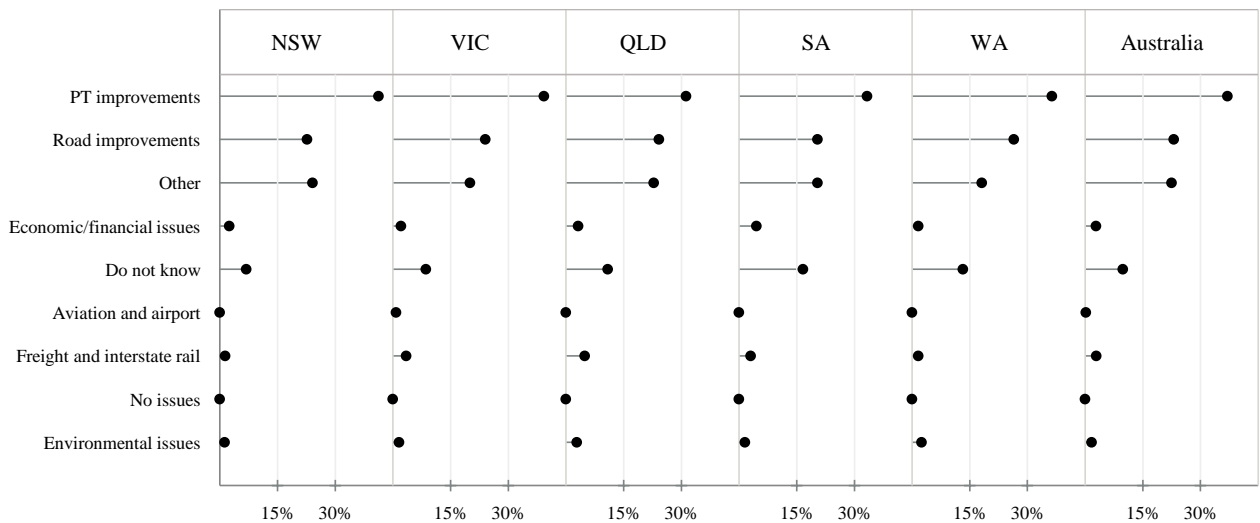
Highest priority transport issue in Australia, 2010 Q1 - 2017 Q1



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 2017 quarter, all states regarded public transport improvements as the highest priority issue in transport, followed by road improvements and other issues, such as security and terrorism and safety issues associated with the transport system.

Highest priority transport issue by state, 2017 Q1



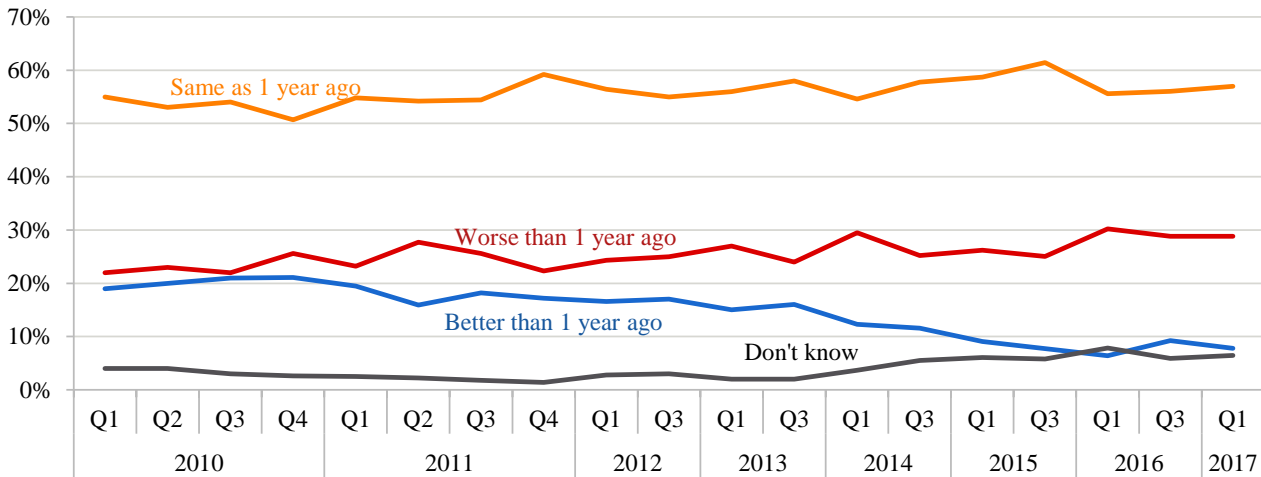
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## 2. Local transport does not change

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?

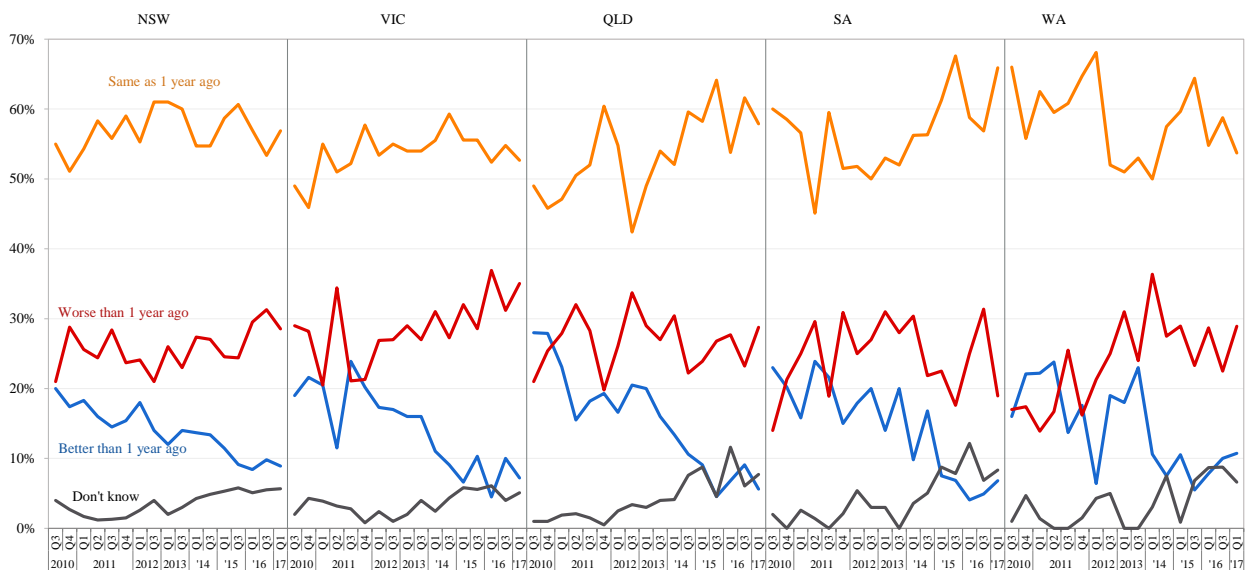
- In the first quarter of 2017, only 8% of Australians believed that transport in their local areas is better now than one year ago, while 57% of Australians said it is the same as one year ago, and 29% of Australian said it is worse now than one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 Q1 - 2017 Q1



- The evaluation of transport in their local area by respondents varies across states of Australia, where respondents from the capital states (NSW, VIC, and Queensland) did not believe transport in their local area is better than that a year ago, while the non-capital states' residents considered that local transport had improved compared to the previous year. However, there is a declining percentage of residents responding that transport in their local area is the same as one year ago (with the exception of NSW and South Australia).

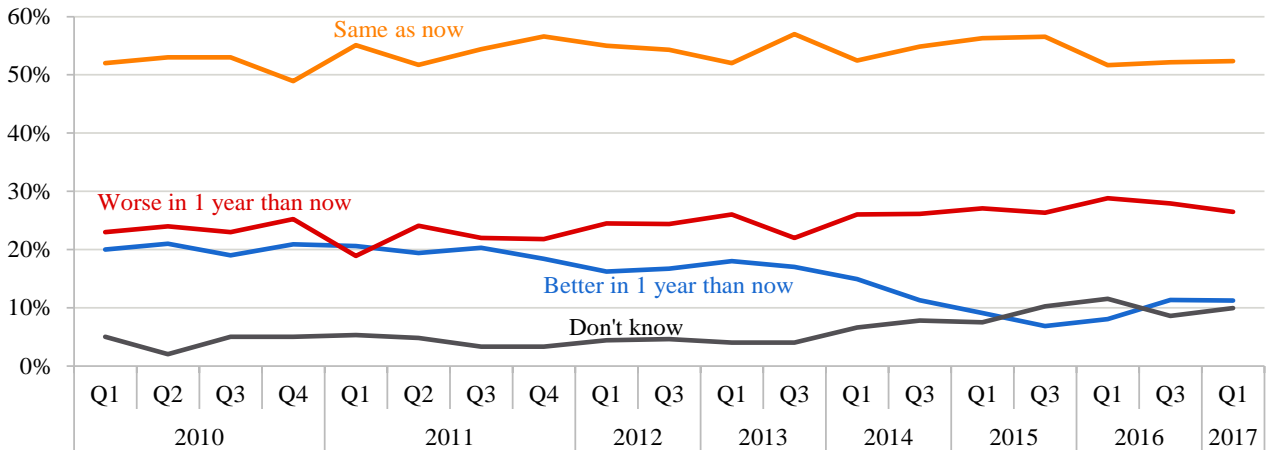
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2017 Q1



*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?*

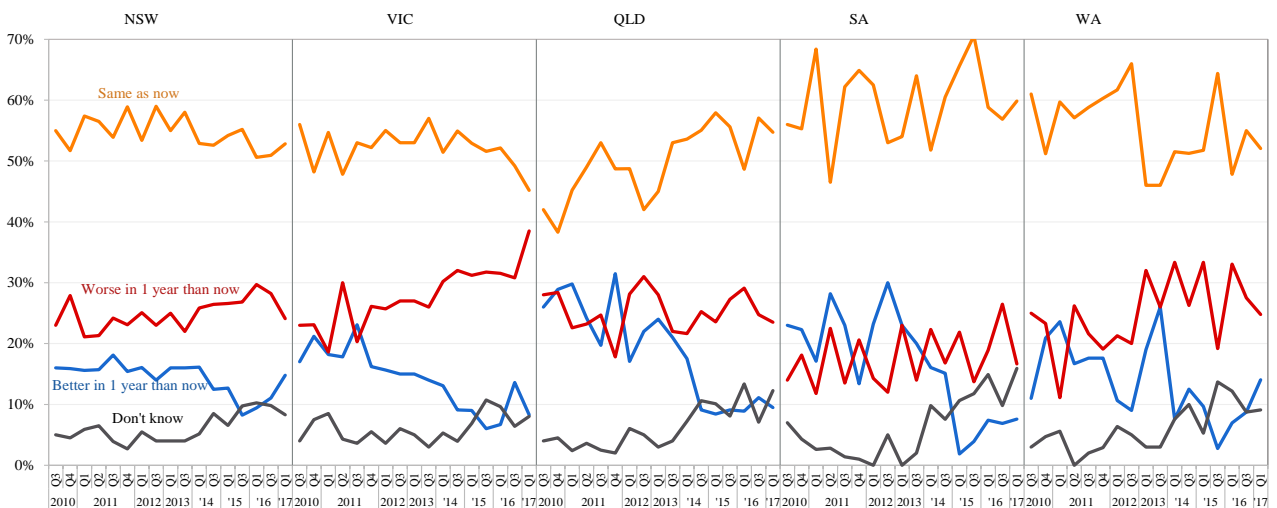
- In the March 2017 quarter, 52% of Australians said that transport in their local area will be the same in one year's time. 11% said transport will be better, slightly up from one year ago at 8% in the first quarter of 2016.

**Transport in local area in 1 year time across Australia, 2010 Q1 - 2017 Q1**



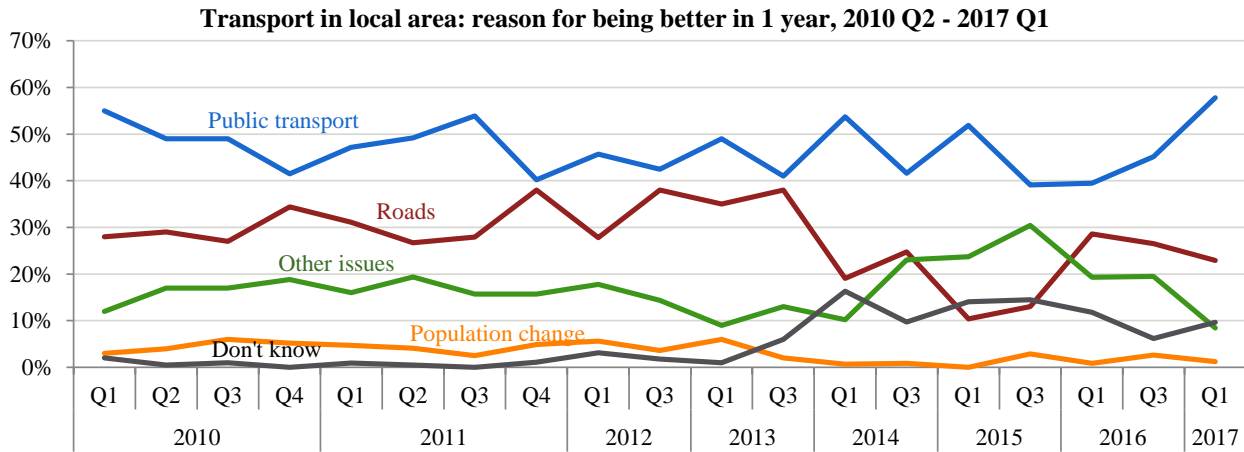
- 15% of New South Wales residents believed that transport in their local area will be better in one year's time; while 39% of Victoria residents believed that transport in their local area will be worse in one year's time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

**Transport in local area in 1 year time by state, 2010 Q3 - 2017 Q1**

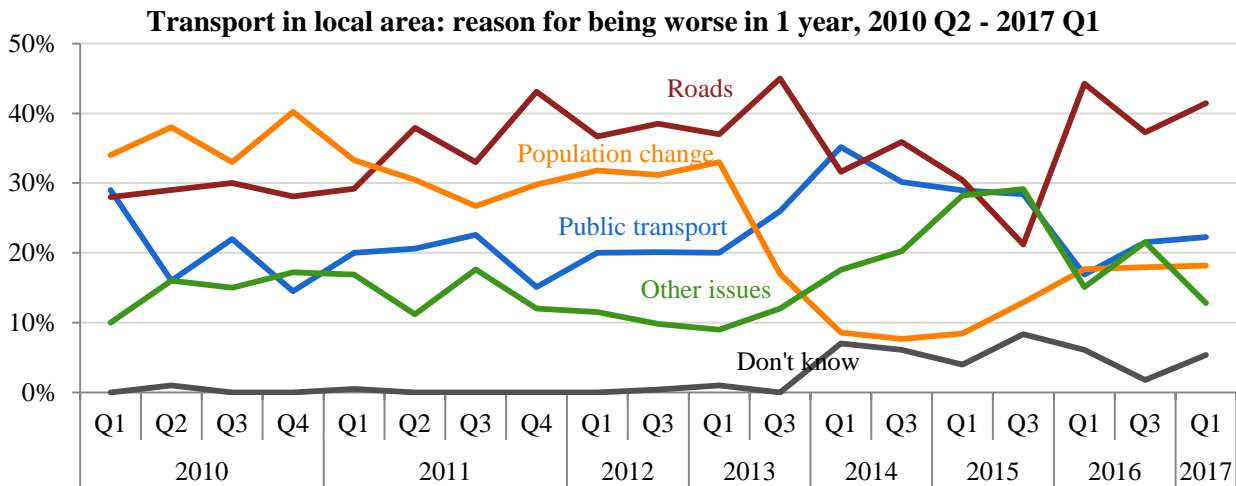


What were you thinking of most when answering that question [about transport in your local area in 1 year's time?

- 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. In addition to public transport, roads and the population change continued to increase as main reasons for residents to believe that their local transport will be worse in one year.



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.



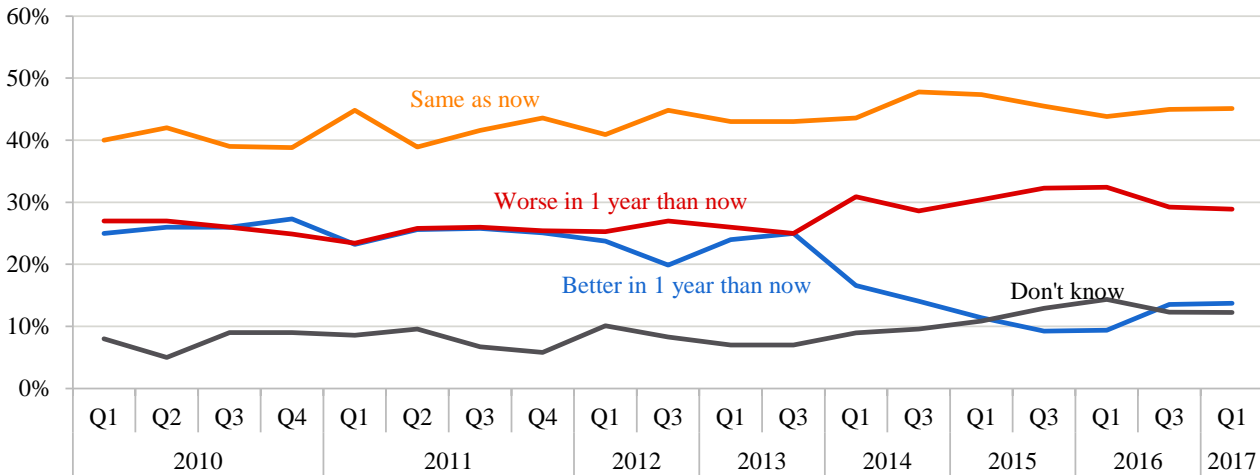
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

### 3. Confidence about transport is declining 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?

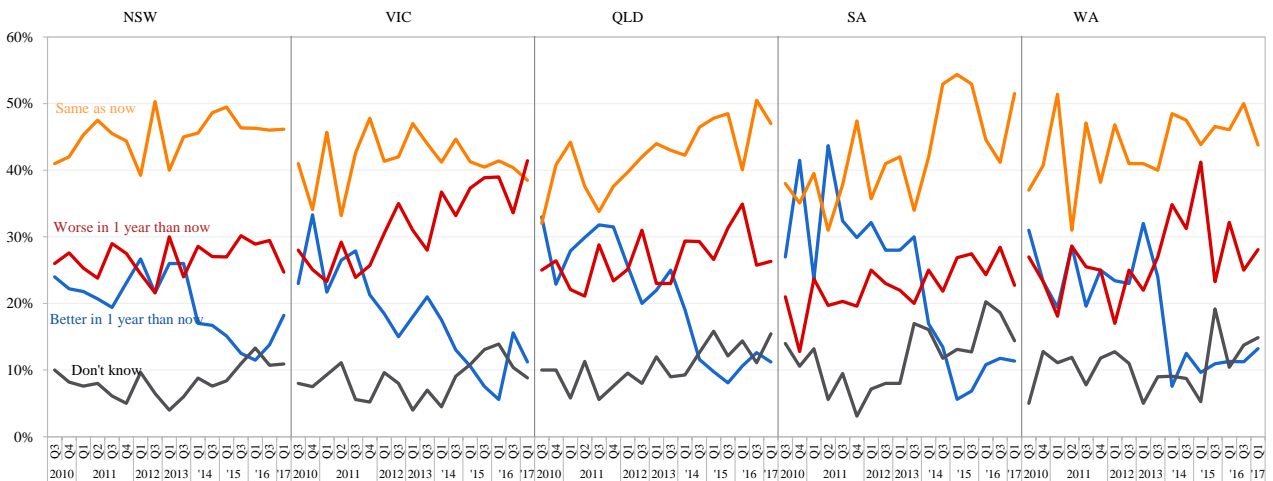
- In the March 2017 quarter, 45% of Australians said that transport in Australia in one year will be the same as now, with only 14% of Australians saying that transport in Australia will be better in one year's time, slightly up from 9% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2017 Q1



- In the March 2017 quarter, about 41% of Victorian residents said that transport in Australia will be worse in one year, and only around 11% said that it will be better. New South Wales residents are relatively more confident about transport in Australia in one year's time, as compared to other states, with 18% of its residents believing that transport in Australia will be better in one year's time.

Transport in Australia in 1 year time by state, 2010 Q3 - 2017 Q1

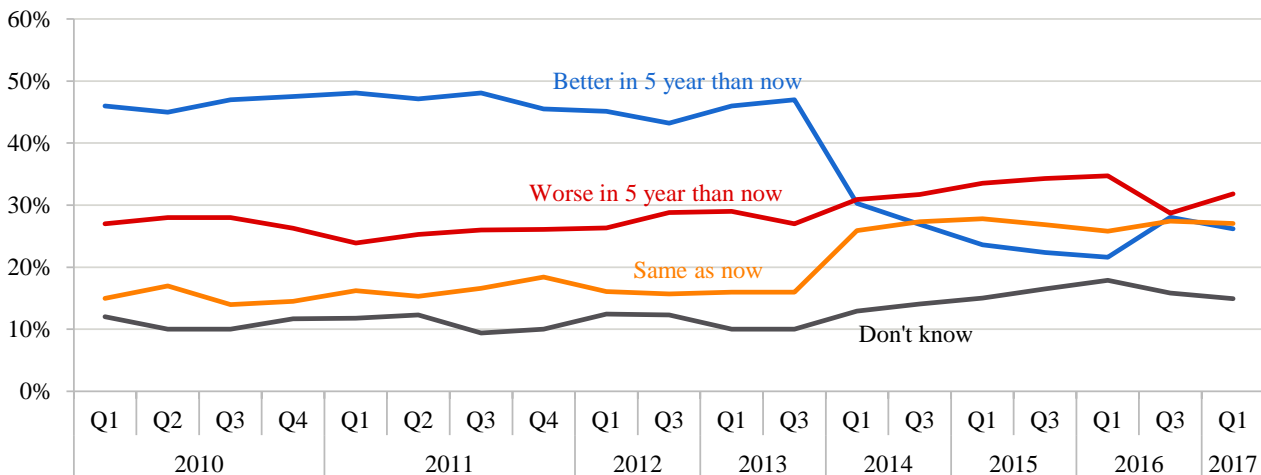




*Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?*

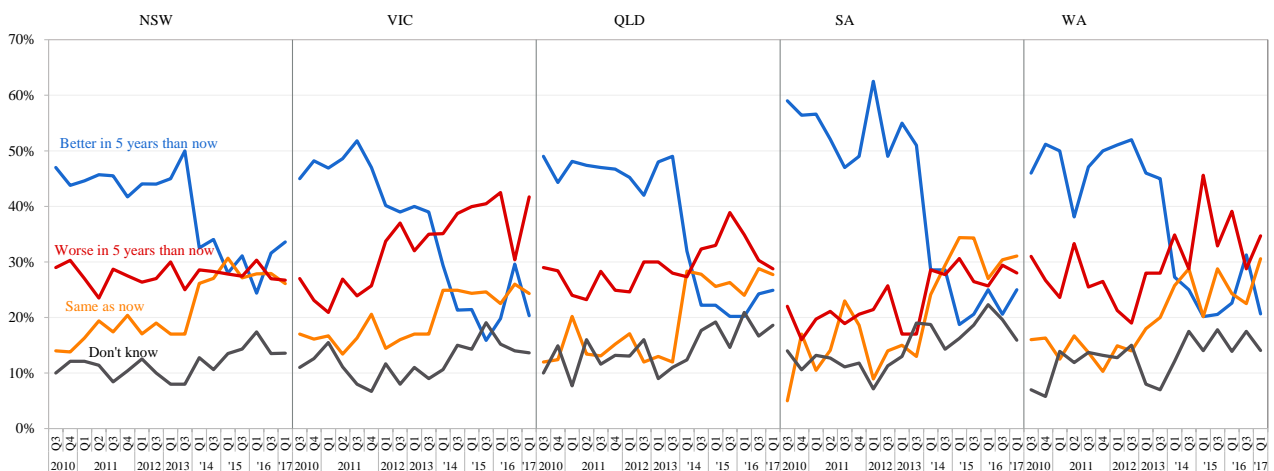
- Australians are losing confidence that transport will be better in five years than it is now. In the March 2017 quarter, 26% of Australian residents believe transport in Australia will be better in five years. This number has increased compared to 22% in March 2016 despite being slightly lower than the 28% in the September 2016 quarter. In contrast, more people believe that transport in Australia will get worse or stay the same in five years' time.

**Transport in Australia in 5 years, 2010 Q1 - 2017 Q1**



- In the March 2017 quarter, 34% of New South Wales, 25% of Queensland, and 25% of South Australia residents think that transport in Australia will be better in five years time compared to now, a little more confident than people living in other states. In contrast, people living in Victoria are least confident, where 42% respondents said that transport in Australia will be worse in five years' time.

**Transport in Australia in 5 years by state, 2010 Q3 - 2017 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.

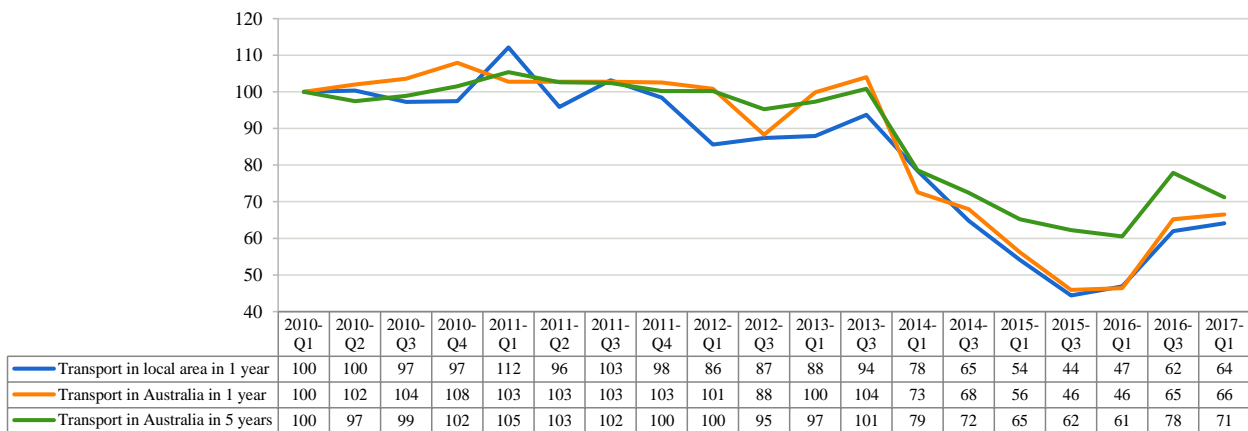
A TOPS Index value of more than 100 means that Australians’ confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2017 quarter as compared to the March 2016 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 become more confident 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 2017 (Confidence index: from 100 to 64), less confident about transport in Australia in the next year (Confidence index: from 100 to 66), and less confident about transport in Australia in five years time (Confidence index: from 100 to 71). There has been a very strong decline in confidence since September 2013 and a slightly decline in confidence as compared to September 2016; however, all three indices stay improved as compared to March 2016.

**ITLS TOPS Index of Transport Confidence**



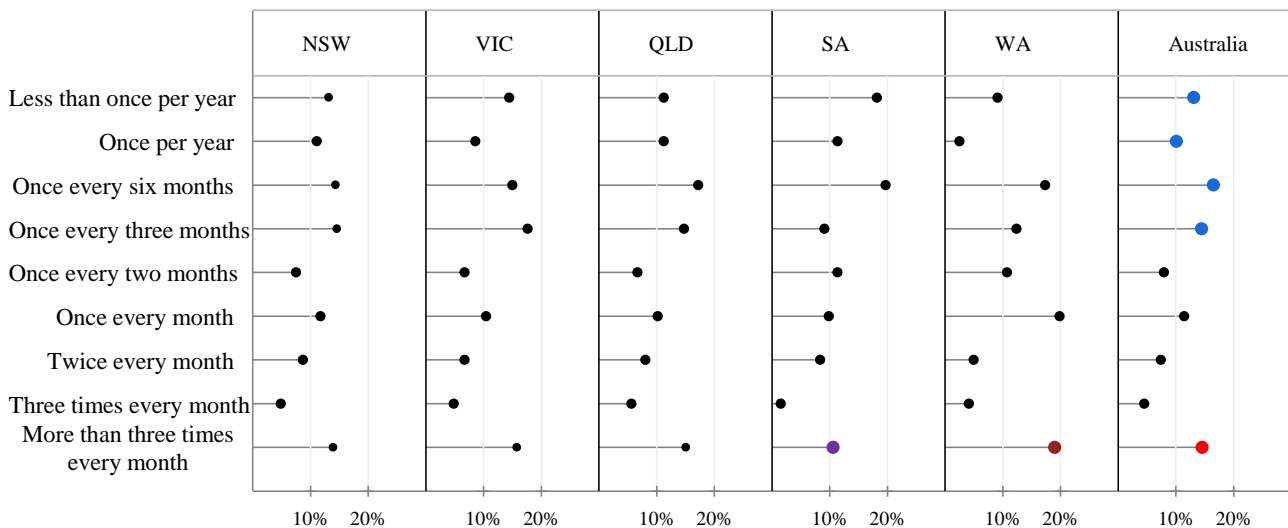
## 5. Supplementary questions on accidents and toll payment

In the March 2017 quarter, two new questions were asked to understand public opinion on the frequency of major-accident occurrence and who is the toll payer in a car when using on tolled routes.

*How often do you think major accidents occur on the route you usually use?*

- On average, 54% of respondents think that major accidents happen on their regular travel routes less than once every three months. However, there are 15% of residents guessing that the occurrence of accidents is more than three times every month.
- The percentages of respondents identifying major accidents occurring more than three times every month varies across Australian states. Up to 19% of respondents from West Australia feel that major accidents occur more than three times every month on their regular routes while only 11% of respondents from South Australia think that accidents happen with this frequency each month.

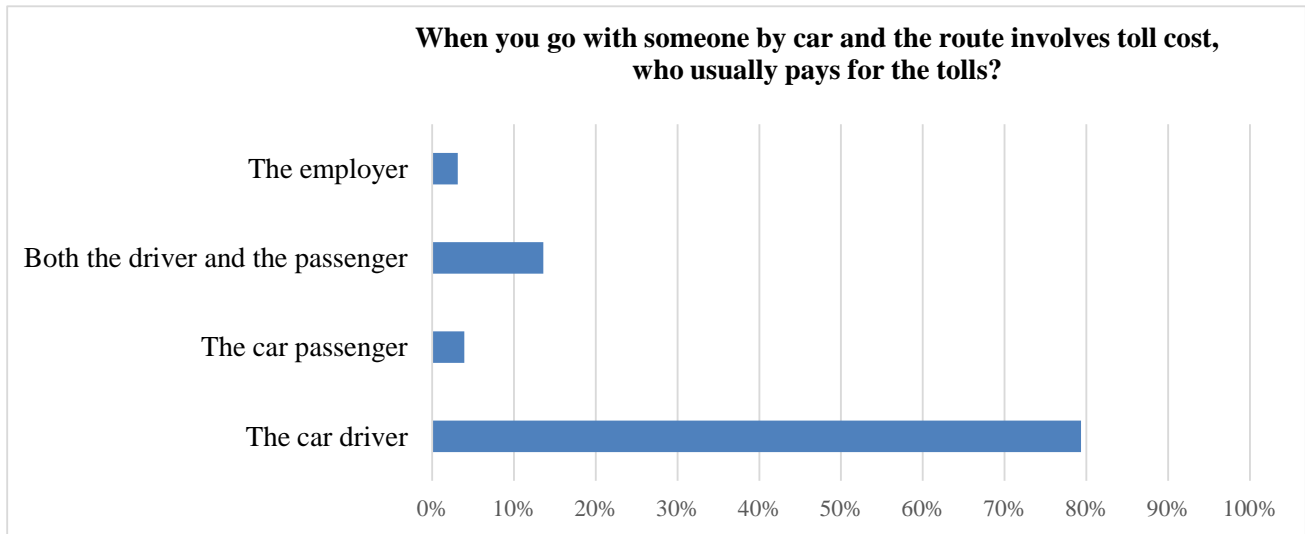
**How often do you think major accidents occur on the route you usually use?**



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*When you go with someone by car AND the route involves a toll cost, who usually pays for the tolls?*

- Overall, 79% of Australian residents reported that the car driver pays for the tolls when traveling by car, while only 14% of respondents share the toll cost between the driver and passengers. There are very few residents responding that the passenger or employer covers the full toll cost.
- Who pays the toll is relatively consistent across Australian states with nearly four out of five cases identifying that car driver pays the toll.



## 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

## 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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