



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

Quarter 3, September 2018

Highlights

Infrastructure and transport increase as the highest priority national issue

- In the September 2018 quarter, 19% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, up from 14% in September 2017. In the September 2018 quarter, 10% of Australians nominated transport as one of the two highest priority issues in Australia today, up from 7% in September 2017.

Public transport the highest priority for transport

- In the September 2018 quarter, 40% of Australians said that the highest priority issue for transport in Australia is public transport improvements, slightly down from 42% in September 2017. This is followed by other issues (22%) and road improvements (21%).

Transport not changed in local areas

- In the September 2018 quarter, 55% of Australians said that transport in their local areas is the same now as one year ago, slightly down from 58% in the September 2017 quarter.

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

- In the September 2018 quarter, 18% of Australians said that transport in their local area will be better in one year's time, slightly up from 16% in the September 2017 quarter.

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

- In the September 2018 quarter, 19% of Australians think that transport in Australia will be better in one year's time, slightly up from 16% in the September 2017 quarter.

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

- In the September 2018 quarter, 34% of Australians think that transport in Australia will be better in five years, up from 28% in the September 2017 quarter and up from 30% in the March 2018.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in September 2018 Australians are less confident about transport in their local area (Confidence index: down from 100 to 85), and across Australia in one-year time (Confidence index: down from 100 to 78), and in five years (Confidence index: down from 100 to 83).

Australians strongly support a new way of charging replacing the fuel tax to change the driving amount

- More than two-thirds of Australian respondents think that they would support the new kind of charge instead of the fuel exercise tax relating to how much people use cars.

Three in five respondents would be willing to be charged when driving in capital cities with the removal of registration charges

- 61% of Australian participants support the charge of 5 cents/km to drive in big Australian cities during peak hours on weekdays if the registration fee was abolished.

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 Taverne 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.



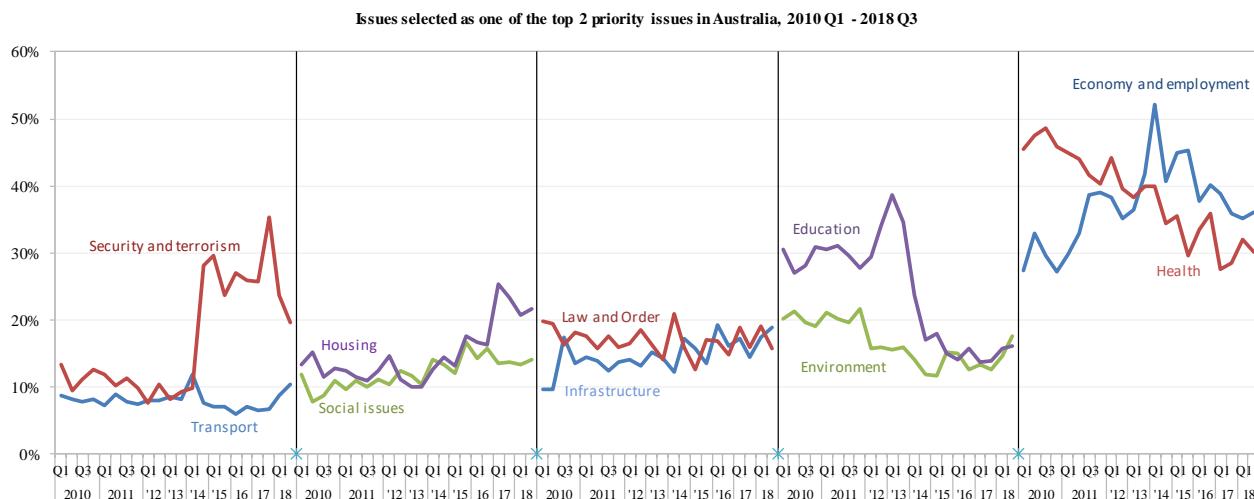
The Quarter 3, September 2018 survey was conducted between 30 August and 1 September 2018. This report is based on the data from 983 completed responses. Current issues in this quarter included asking Australian respondents if they would support a new way of charging directly related to the amount that people use roads instead of the fuel excise tax and if they would be willing to pay 5cents/km to drive in capital cities during the weekday peak time given the registration charges were removed.



Transport as a national priority

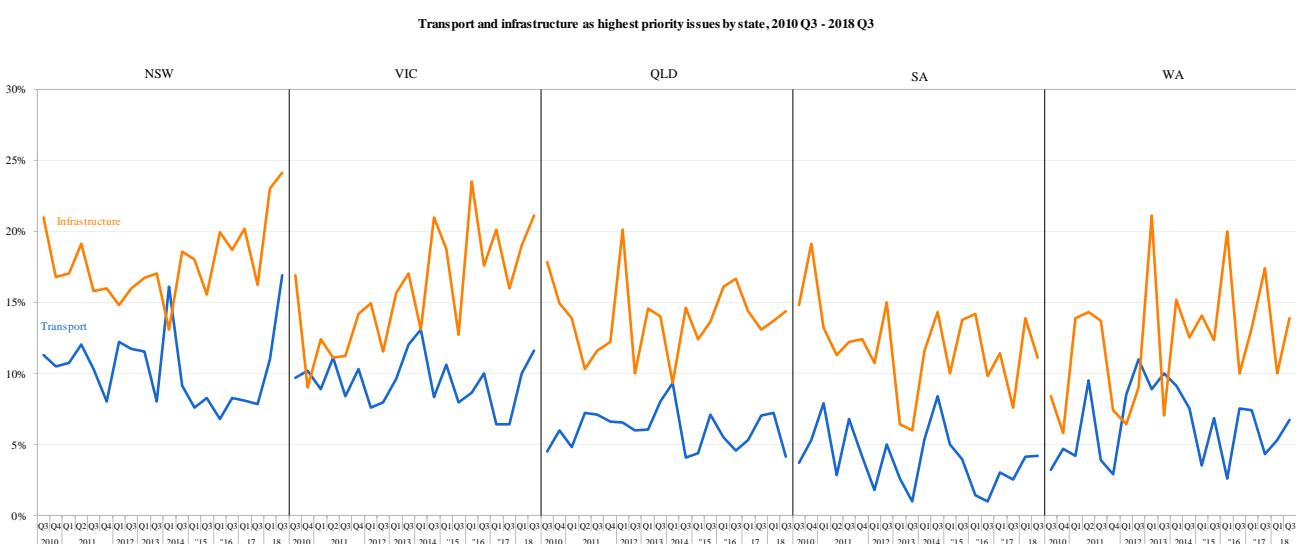
Which two of these issues do you think are the highest priority in Australia today?

- In the third quarter (Q3) of 2018, the economy and employment continued to show up as the highest priority issue in Australia, nominated by 36% of Australians, followed by health (30%). Australians were concerned and well informed about housing (22%) and security and terrorism (20%), 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.



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 3 of 2018, 17% of New South Wales residents nominated transport as a priority as compared to 4% of Queensland and South Australian residents.



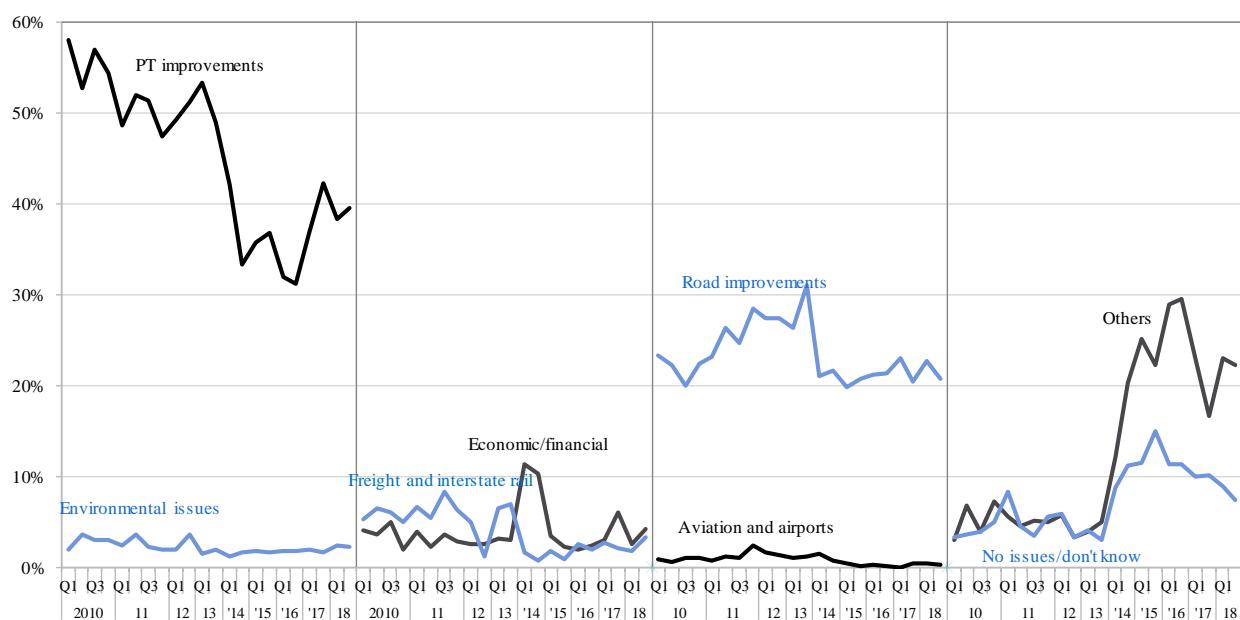


1. Highest priority issue for transport

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

- In the September 2018 quarter, 40% 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 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%).

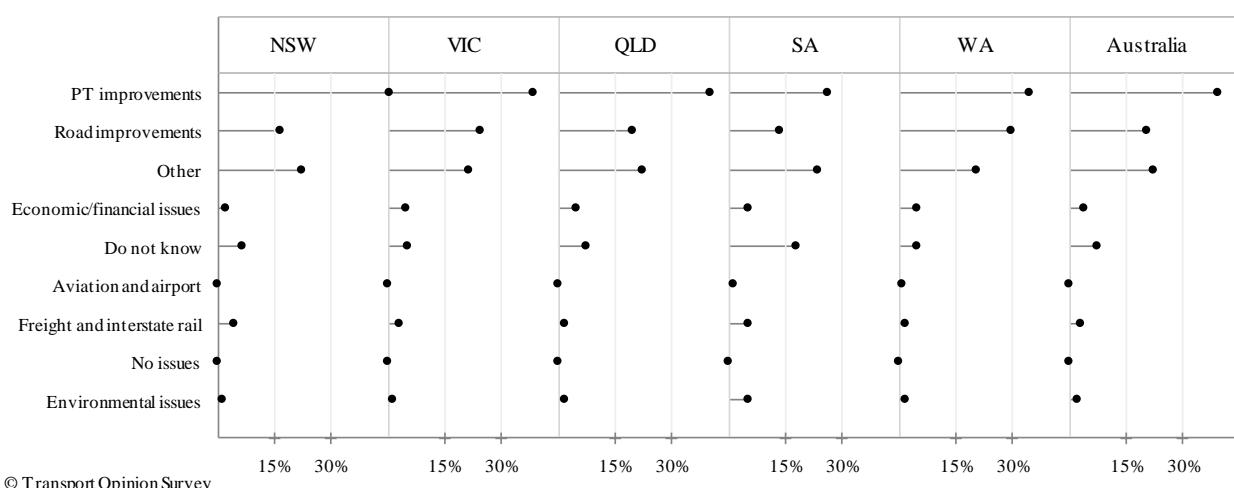
Highest priority transport issue in Australia, 2010 Q1 - 2018 Q3



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 September 2018 quarter, all states regarded public transport improvements as the highest priority issue in transport. The second highest priority is road improvements in Victoria and Western Australia while that is other issues in New South Wales, Queensland, and South Australia.

Highest priority transport issue by state, 2018 Q3



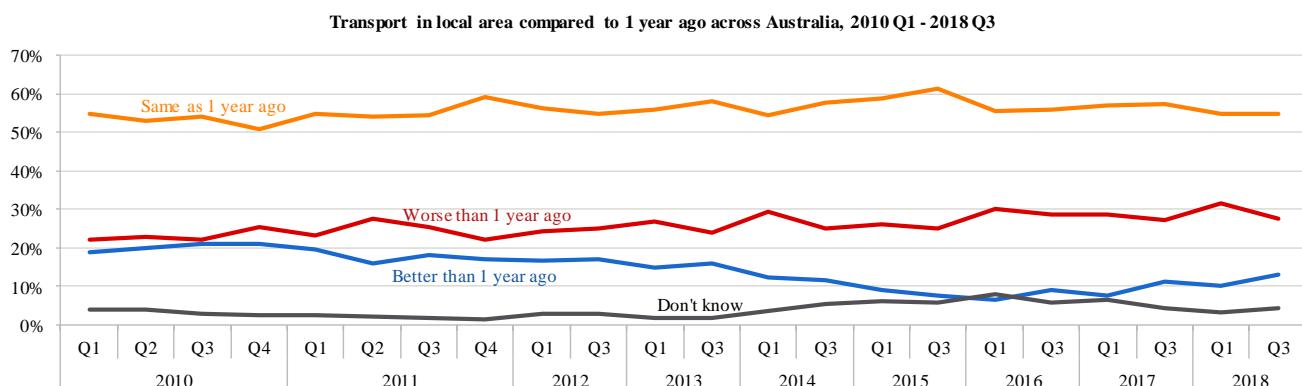
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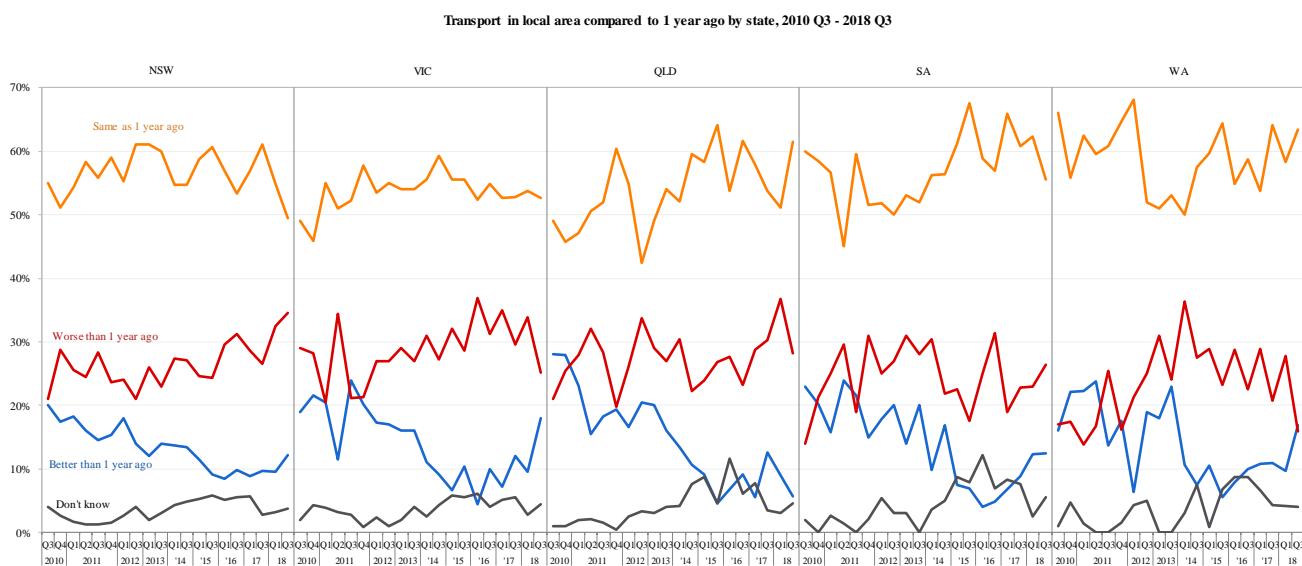
2. Local transport does not change

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 third quarter of 2018, only 13% 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 28% 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 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 Queensland. In contrast, the proportion of residents thinking that transport becomes worse in their local area decreases in three out of five states, except New South Wales and South Australia increasing for this category.

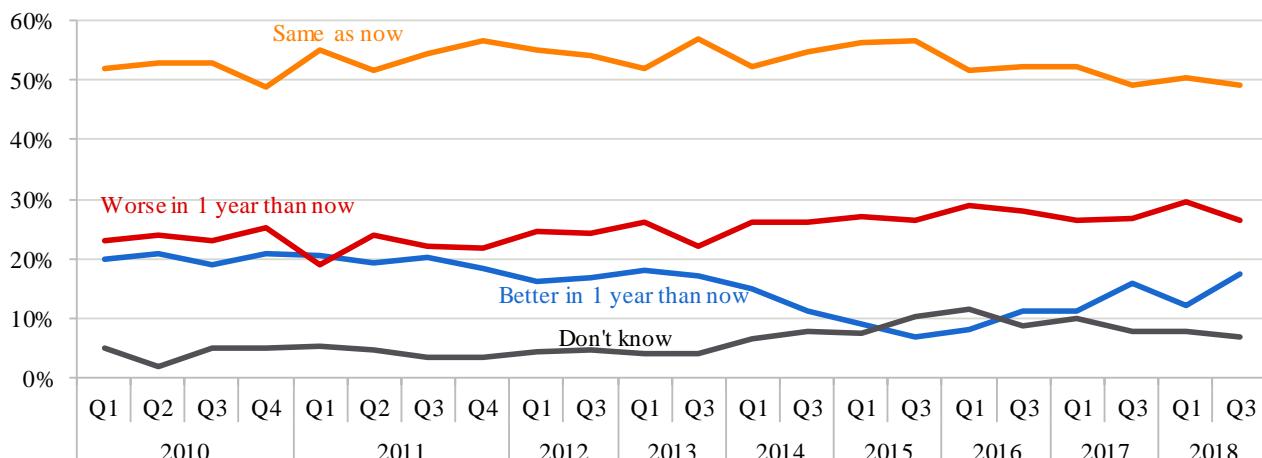




Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

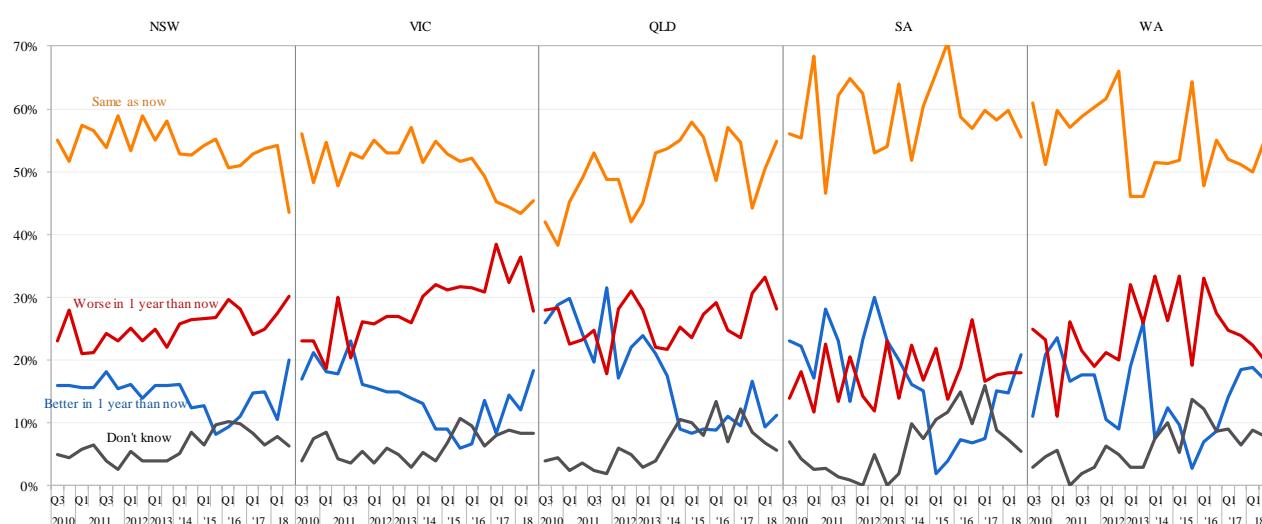
- In the September 2018 quarter, 49% of Australians said that transport in their local area will be the same in one year's time. 18% said transport will be better, slightly up from 16% in the September 2017 while 27% said transport will be worse, the same as the third quarter of 2018.

Transport in local area in 1 year time across Australia, 2010 Q1 - 2018 Q3



- 21% of South Australian residents believed that transport in their local area will be better in one year's time; while 30% of New South Wales 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.

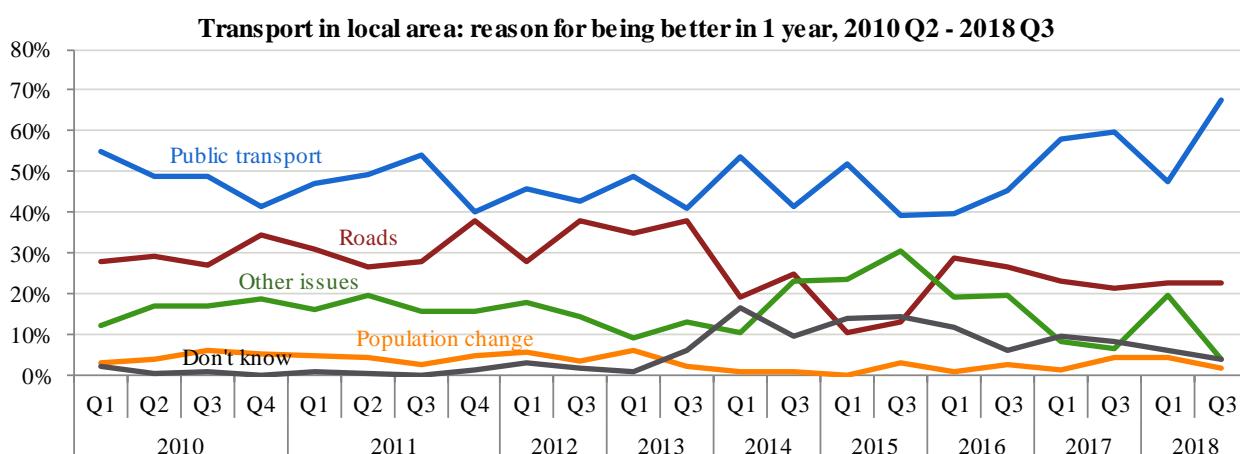
Transport in local area in 1 year time by state, 2010 Q3 - 2018 Q3



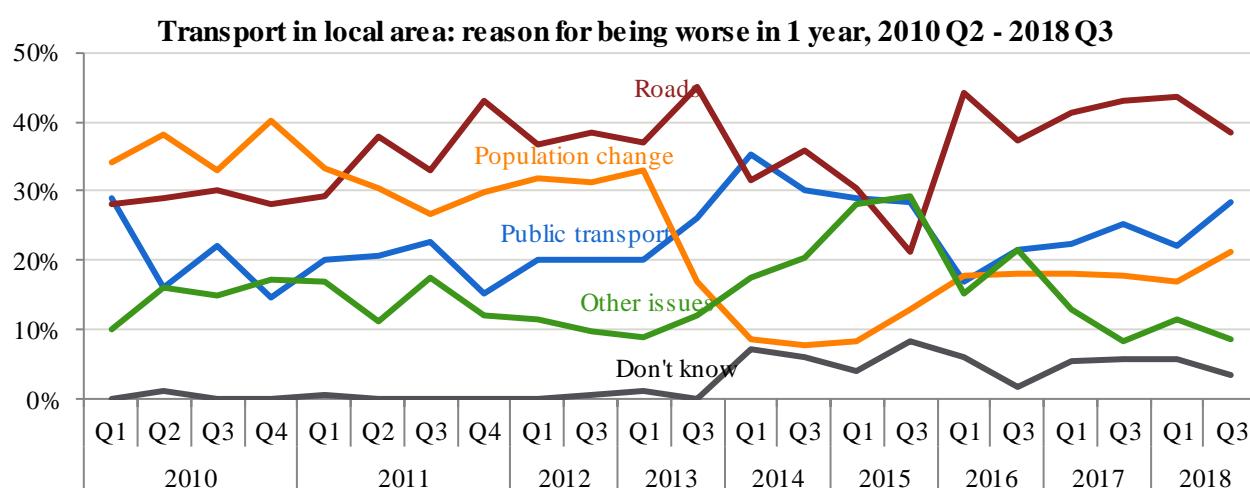


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- 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. Public transport increased while roads slightly decreased as compared to last year. In addition to public transport and roads, population change slightly declined 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, decreased 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.



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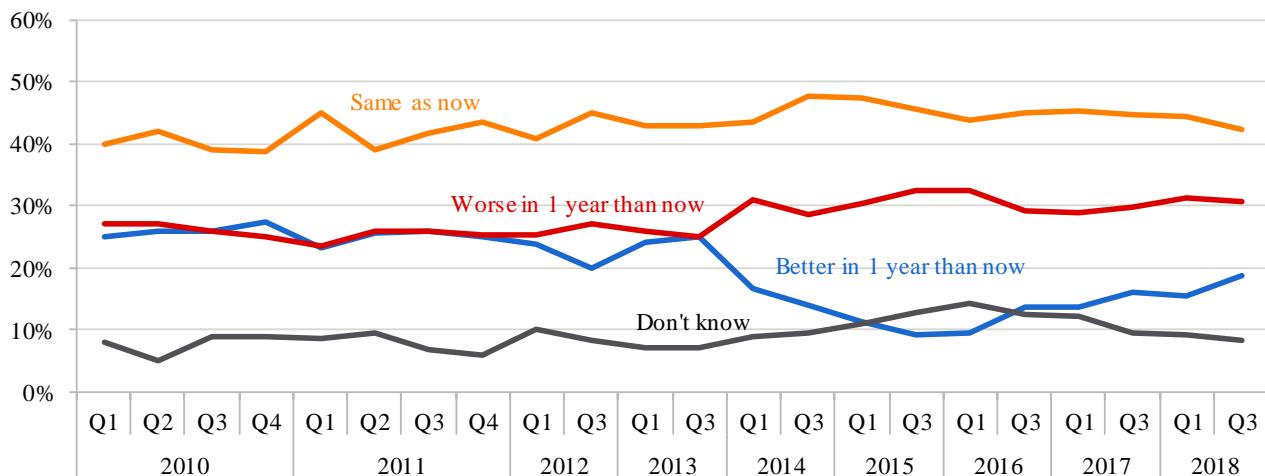


3. Confidence about transport is growing in Australia

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?

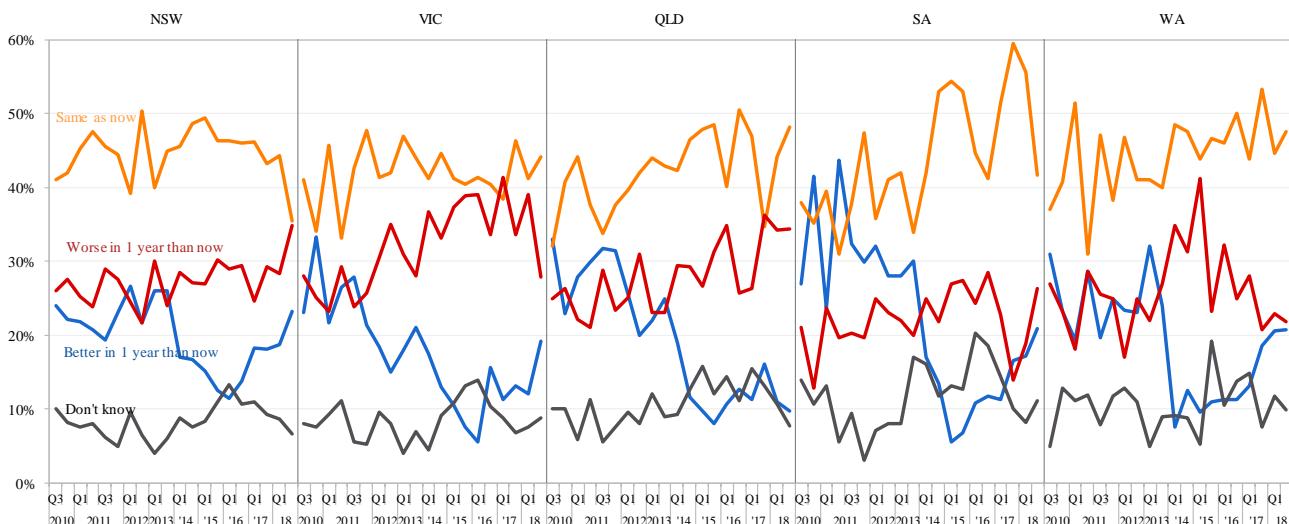
- In the September 2018 quarter, 42% of Australians said that transport in Australia in one year will be the same as now, with 19% of Australians saying that transport in Australia will be better in one year's time, slightly up from 16% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2018 Q3



- In the September 2018 quarter, about 35% of New South Wales residents said that transport in Australia will be worse in one year, and around 23% said that it will be better. Queensland residents are relatively less confident about transport in Australia in one year's time, as compared to other states, with 10% of their residents believing that transport in Australia will be better in one year's time and 34% 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 - 2018 Q3

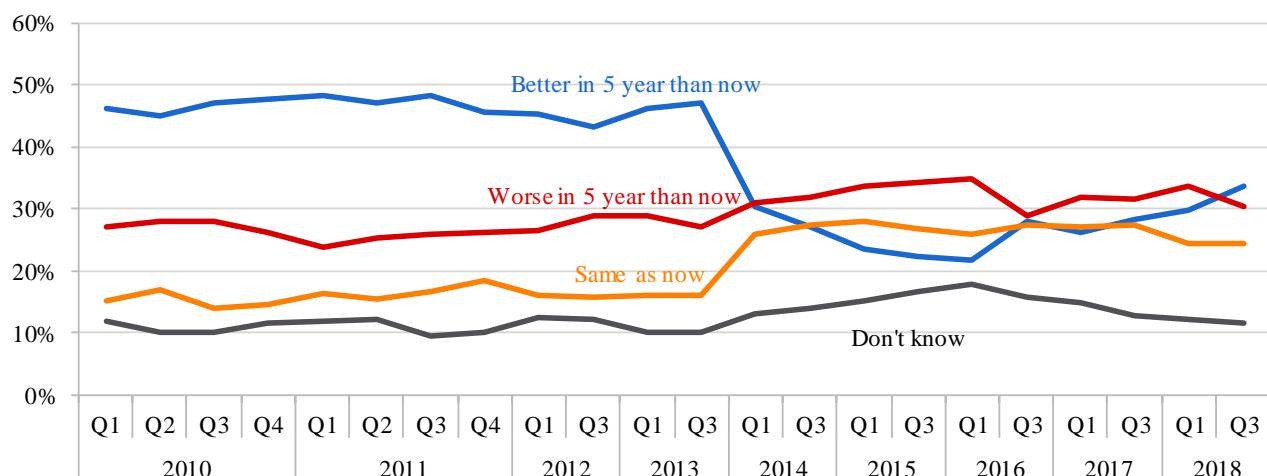




Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

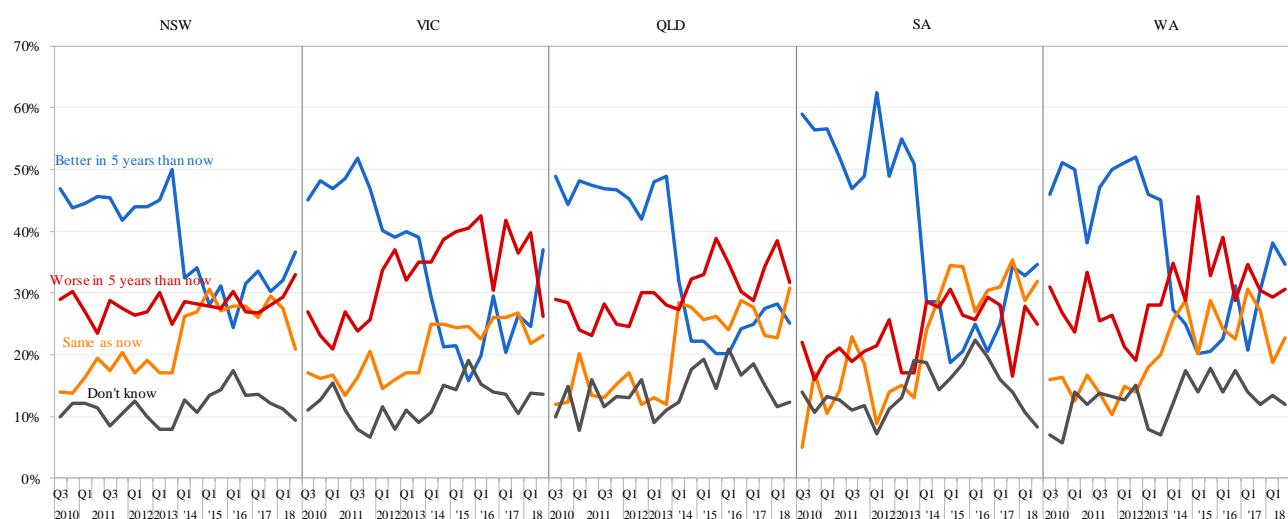
- Australians are slightly gaining confidence that transport will be better in five years than it is now. In the September 2018 quarter, 34% of Australian residents believed transport in Australia will be better in five years, up from 28% in the September 2017 quarter. Also, less people believed that transport in Australia will get worse in five years' time compared to the September 2017.

Transport in Australia in 5 years, 2010 Q1 - 2018 Q3



- In the September 2018 quarter, 37% of New South Wales and Victorian 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 25% respondents said that transport in Australia will be better and 32% of their residents thought that Australian transport will be worse in five years' time.

Transport in Australia in 5 years by state, 2010 Q3 - 2018 Q3





4. Change in confidence over time – TOPS Index

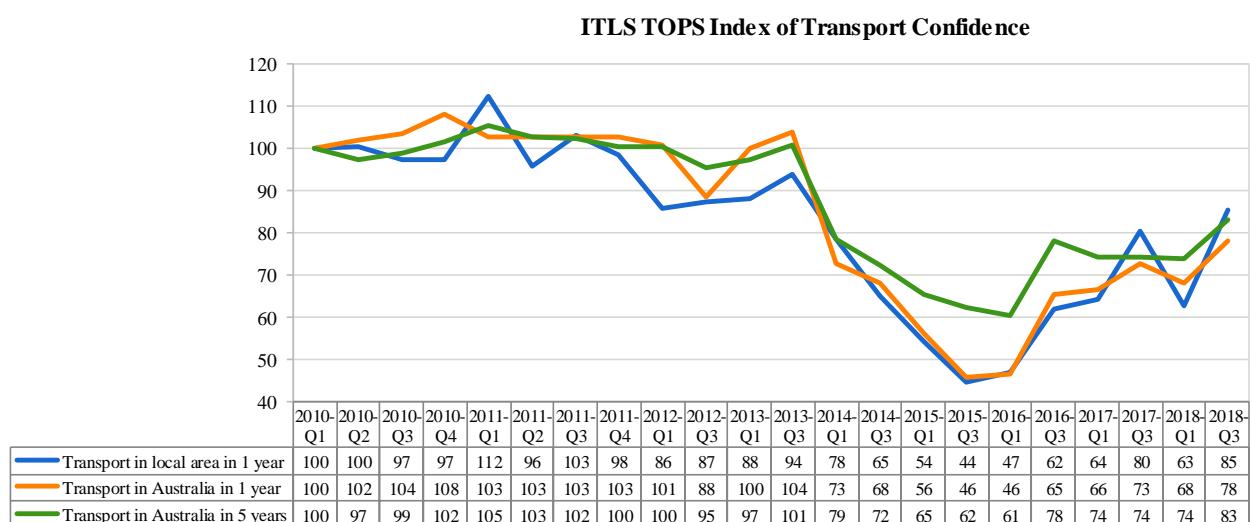
Responses from the first Transport Opinion Survey about transport getting better or worse are used to set an index of 100 in quarter 1, March 2010. In each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia 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 September 2018 quarter as compared to the September 2017 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 September 2018 (Confidence index: from 100 to 85), less confident about transport in Australia in the next year (Confidence index: from 100 to 78), and less confident about transport in Australia in five years time (Confidence index: from 100 to 83). There has been a very strong decline in confidence since September 2013; however, all three indices have significantly recovered compared to the year 2015.



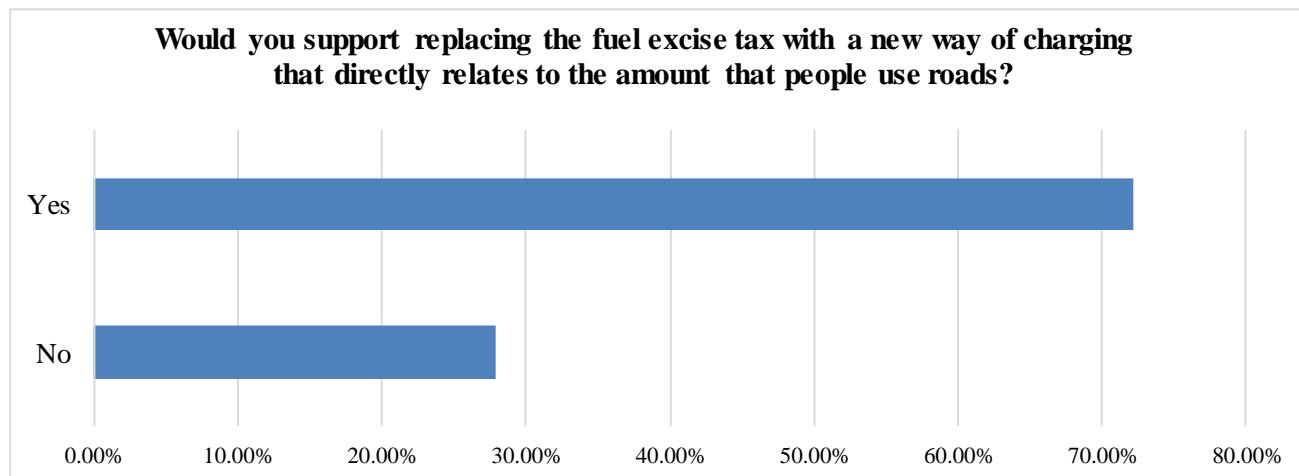


5. **Supplementary questions on supporting a planned policy changing the way of charging related to the amount of driving instead of the fuel tax, and the charge of 5 cents/km when driving in big cities in peak hours on weekdays with the removal of the registration fee.**

In the September 2018 quarter, two new questions were asked to understand public opinion on their thoughts about replacing the fuel exercise tax with a new charge without increasing the total charge paid by all drivers) that may change how much people use cars. In addition, Australians were asked if they would be willing to pay 5 cents per vehicle km of driving in capital cities without being charged the registration fee.

Would you support replacing the fuel excise tax with a new way of charging (without increasing the total charge paid by all drivers) that directly relates to the amount that people use roads?

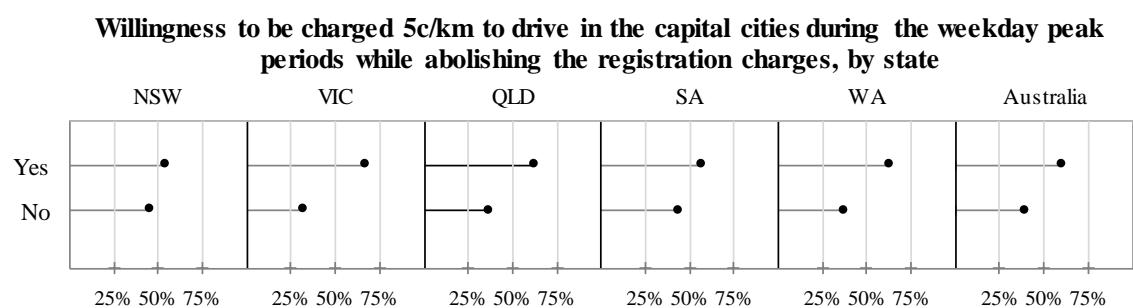
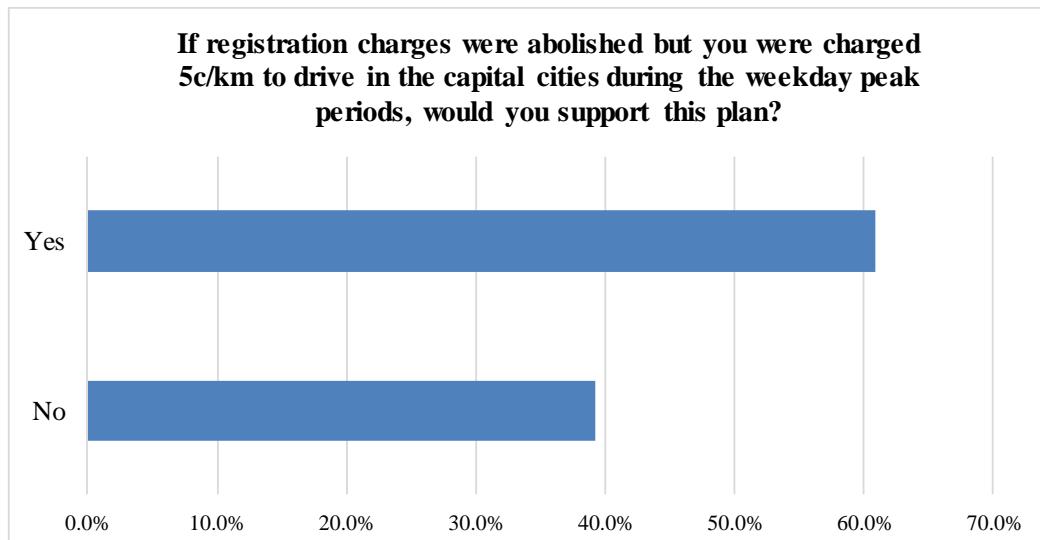
On average, 72% of Australian respondents said that they would support the charge related to the driving amount instead of the fuel exercise tax while not increasing the total driving cost.





If registration charges were abolished but you were charged 5c/km to drive in the capital cities during the weekday peak periods, would you support this plan?

- When asked about the plan for charging every vehicle km driving in capital cities with 5 cents in peak hours while abolishing the registration fee, approximately 61% of Australian respondents voted for this (top figure).
- The strongest support for 5 cent-per-km charge is from Victoria (68%), followed by Western Australia and Queensland (63%) while the least support for this plan is from South Australia (43%) (bottom figure).



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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

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.

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

Email business.itlsinfo@sydney.edu.au