

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

Quarter 3, September 2014

Highlights

Infrastructure increases as the highest priority national issue

- In the September 2014 quarter, 17% of Australians nominated infrastructure and 8% nominated transport as one of the two highest priority issues in Australia today.

Public transport the highest priority for transport

- One in three Australians said that the highest priority issue for transport in Australia is public transport improvements, followed by road improvements (22%).

Transport not changed in local areas

- 58% of Australians said that transport in their local areas is the same now as one year ago, up from 55% in the March 2014 quarter (the last survey period).

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

- Only 11% of Australians said that transport in their local areas will be better in one year's time.

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

- 14% of Australians think that transport in Australia will be better in one year's time, down from 17% in the March 2014 quarter.

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

- Australians have lower confidence that transport in Australia will be better in five years than now, with only 27% now thinking that transport in Australia will be better in five years, down from 30% in the March 2014 quarter.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in September 2014 Australians are less confident about transport in their local areas (Confidence index: from 100 to 65), and across Australia in one year (Confidence index: from 100 to 68), and five years (Confidence index: from 100 to 72).

One third of Australians are able to work at home or telecommute

- One in three Australians indicated they are able to work at home or telecommute, with or without permission. In addition, two in five workers have home as their regular workplace.
- A majority (54%) of those who are able to work at home or telecommute also have flexible working hours.

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.

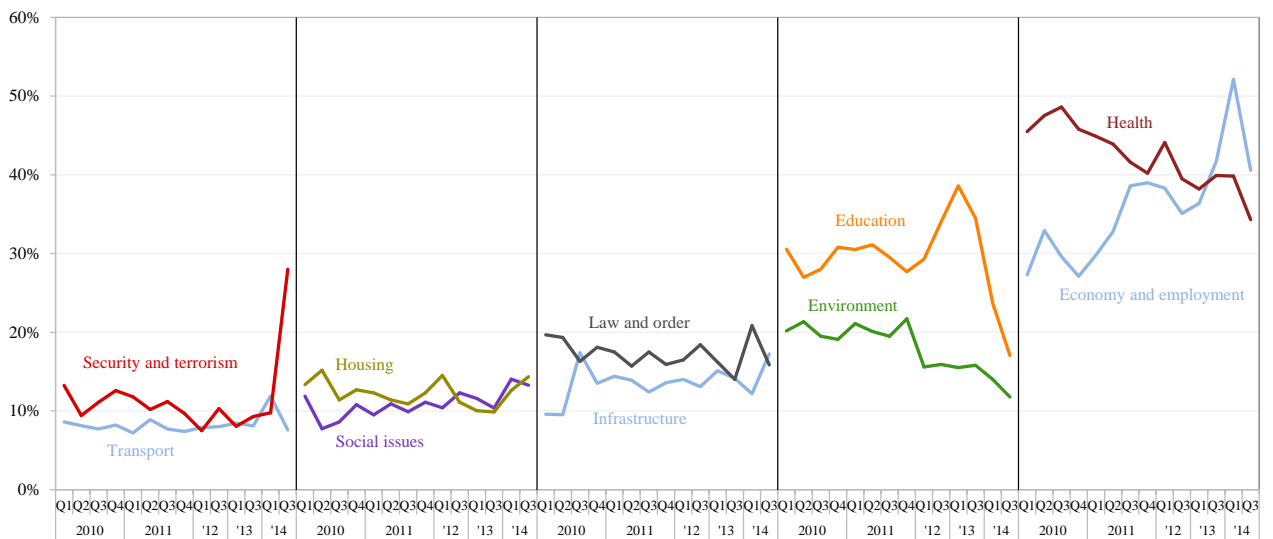
The Quarter 3, September 2014 survey was conducted over 16 – 19 September 2014. Current issues in this quarter included asking Australian residents whether they are able to work at home or telecommute if they want, and about the flexibility of the working hours for those who are currently able to work at home or telecommute.

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 2014, economy and employment continued to show up as the highest priority issue in Australia, nominated by 41% of Australians, followed by health (34%). Australians were concerned and well informed about security and terrorism issues, which was nominated as one of the top two priority issues in Australia by many more respondents in this quarter (28%) as compared to the previous occasion of survey (10%).
- 17% of Australians nominated infrastructure and 8% nominated transport as one of the two highest priority issues in Australia today.

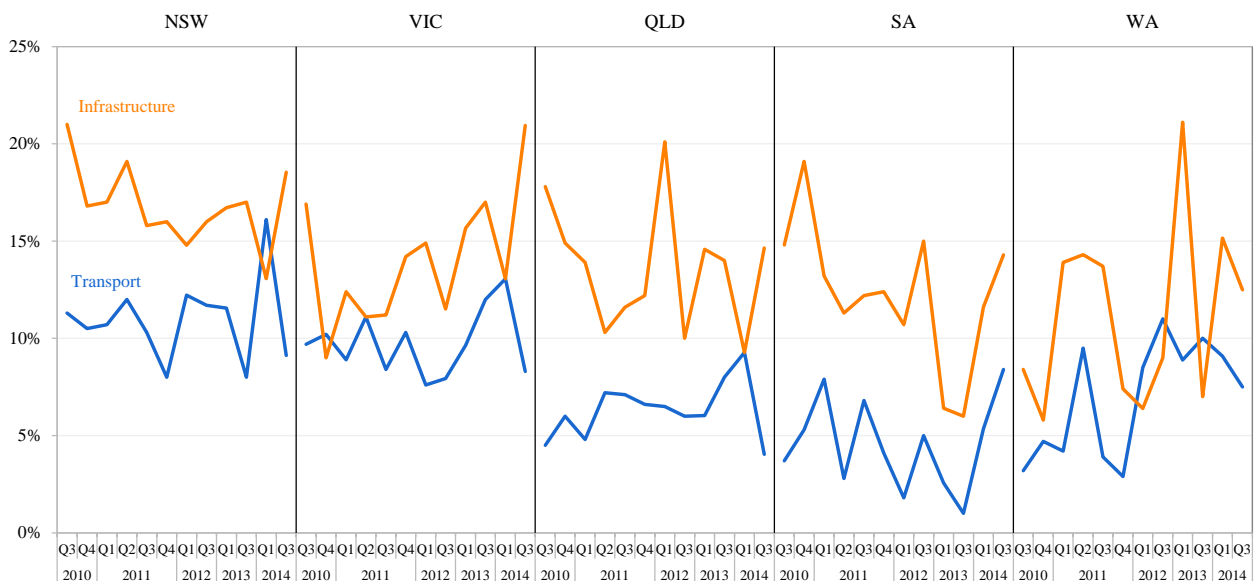
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2014 Q3



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 Quarter 3 of 2014, 9% of New South Wales residents nominated transport as a priority as compared to 4% of Queensland residents.

Transport and infrastructure as highest priority issues by state, 2010 Q3 - 2014 Q3

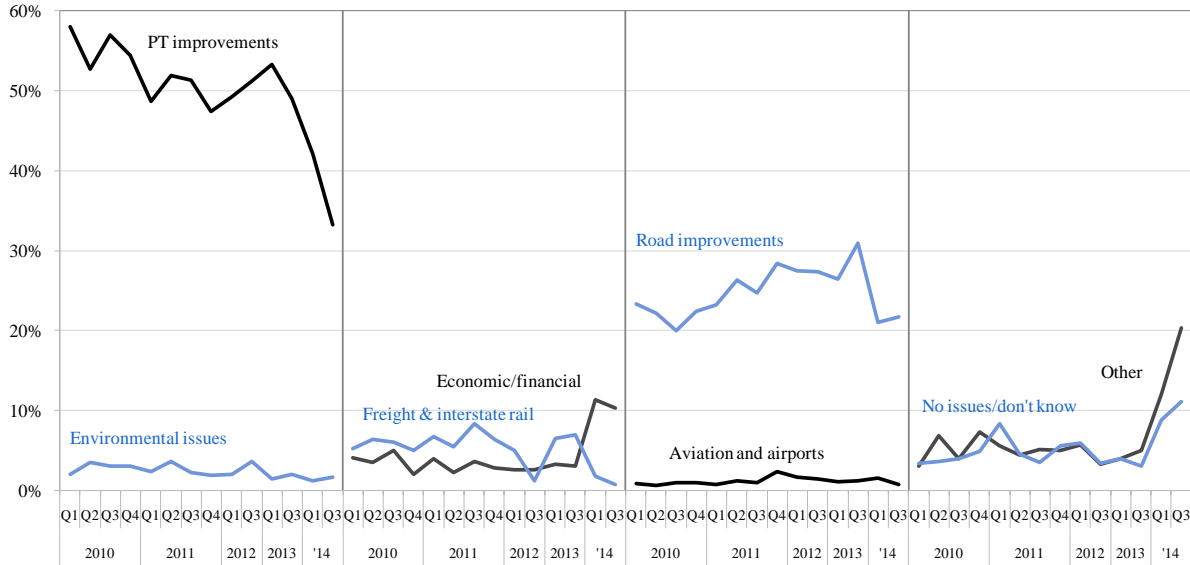


1. Highest priority issue for transport

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

- In the September 2014 quarter, 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. Only one in five Australians nominated road improvements as the highest priority issue for transport in Australia.

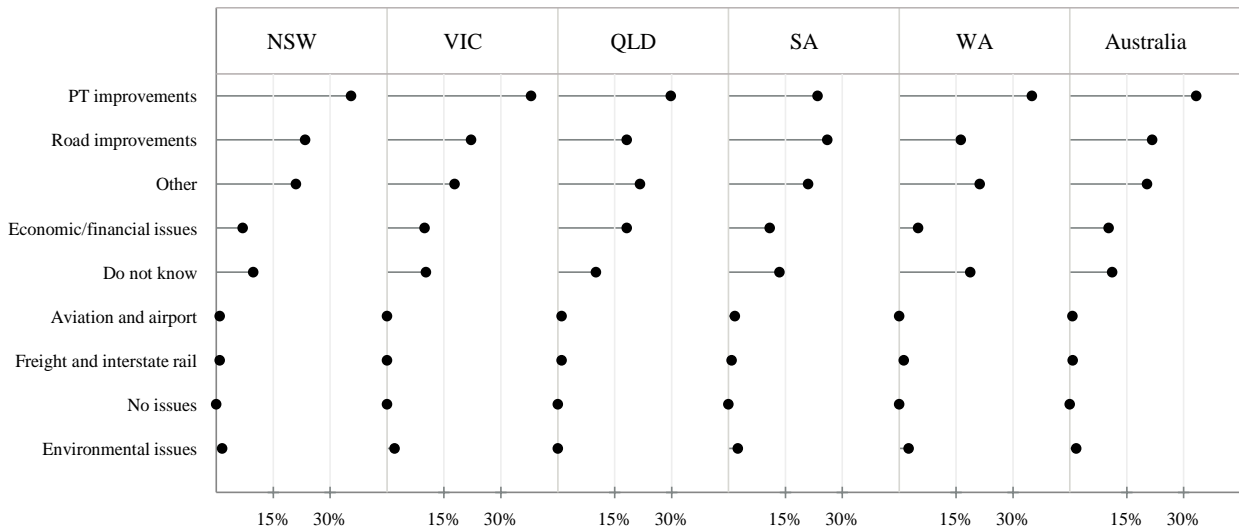
Highest priority transport issue in Australia, 2010 Q1 - 2014 Q3



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 2014 quarter, all states except South Australia regarded public transport improvements as the highest priority issue in transport, followed by road improvements and other issues, such as security and terrorism associated with transport system.

Highest priority transport issue by state, 2014 Q3



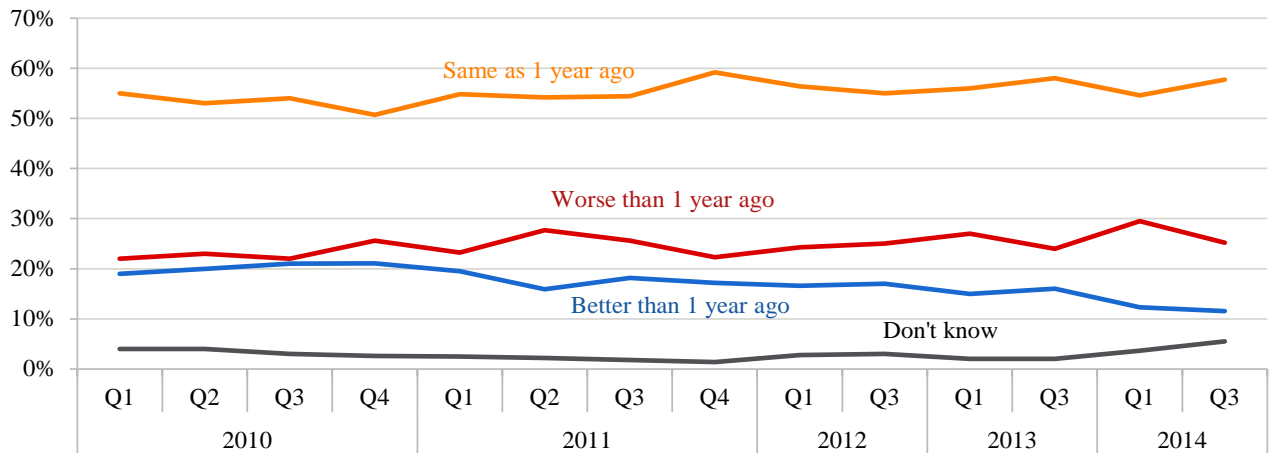
© Transport Opinion Survey

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?

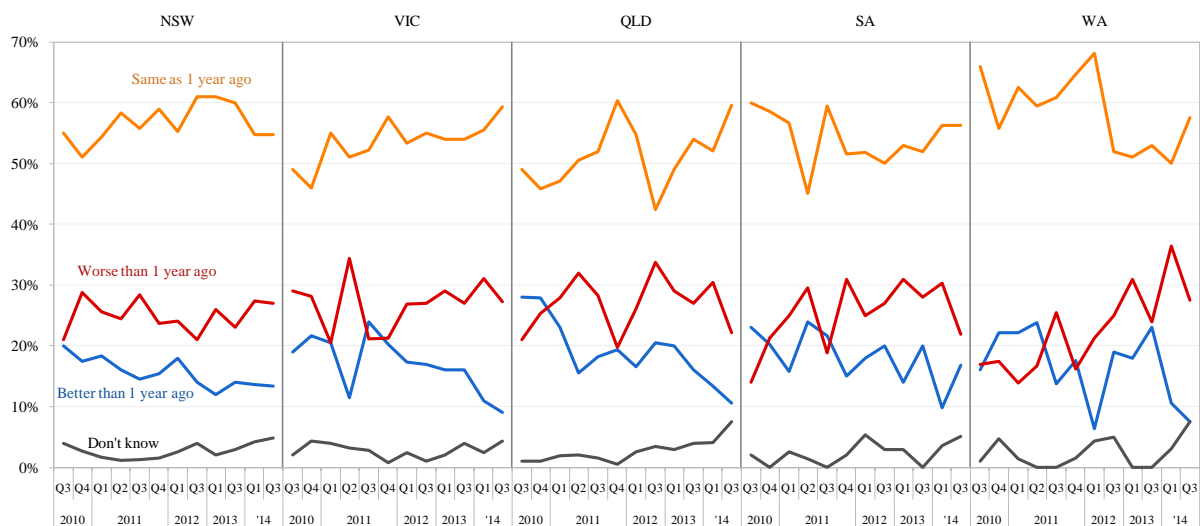
- In the third quarter of 2014, only 12% of Australians believed that transport in their local areas is better now than one year ago, while 58% of Australians said it is the same as one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 Q1 - 2014 Q3



- The evaluation of public transport by respondents is consistent across all states of Australia but with an increasing percentage of people saying that transport in their local areas has not changed from one year ago. However, there is a declining percentage of residents responding that transport in their local area is worse or better now than one year ago.

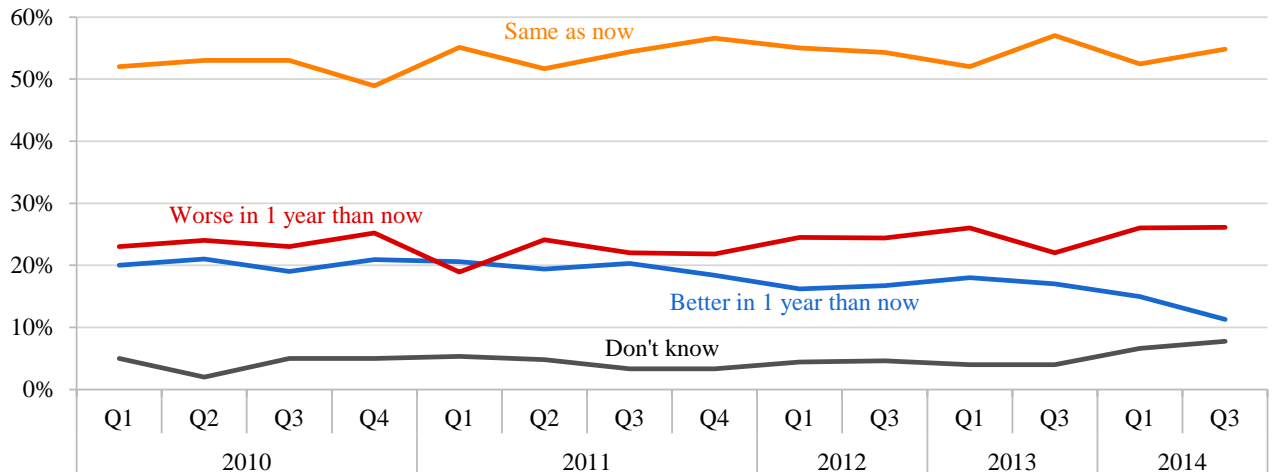
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2014 Q3



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?

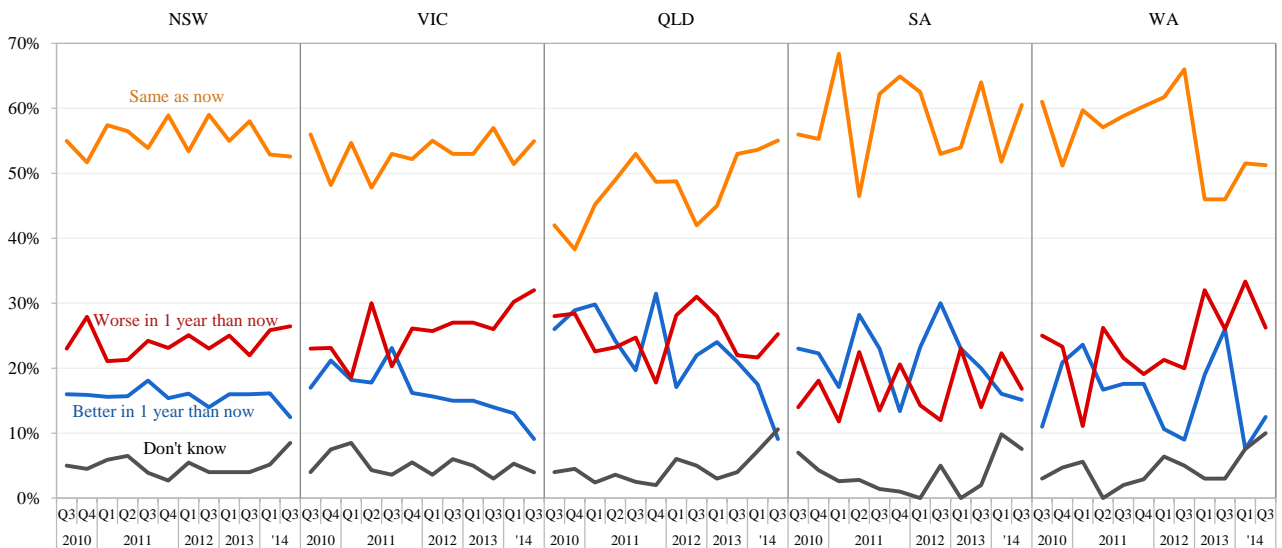
- In the September 2014 quarter, 55% of Australians said that transport in their local areas will be the same in one year's time. Only 11% said transport will be better, slightly down from one year ago at 17% in the third quarter of 2013.

Transport in local area in 1 year time across Australia, 2010 Q1 - 2014 Q3



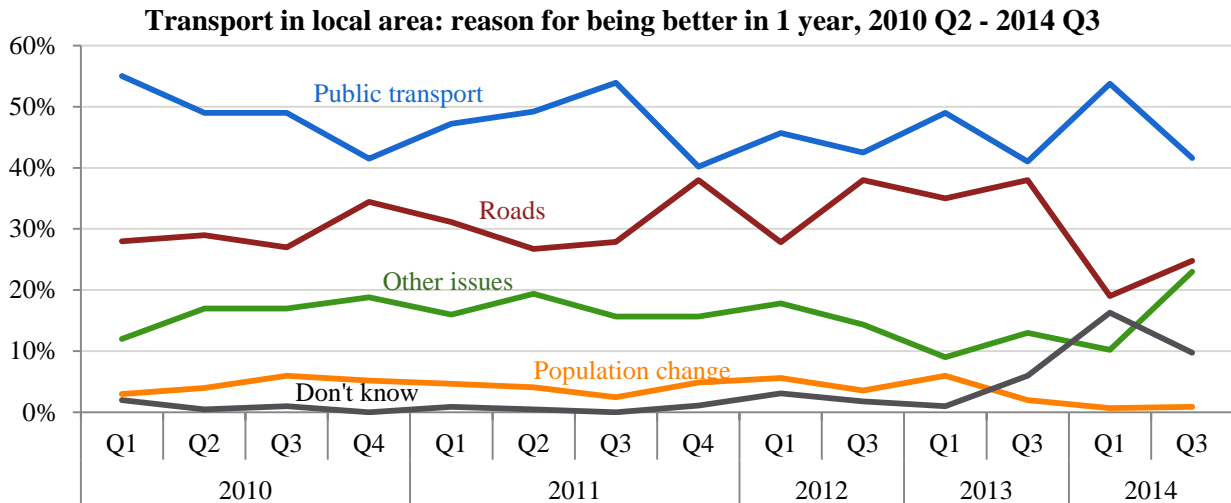
- 15% of South Australia residents believed that transport in their local area will be better in one year's time; while only 9% of Victoria and Queensland residents believed the same will happen to their local transport. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 Q3 - 2014 Q3

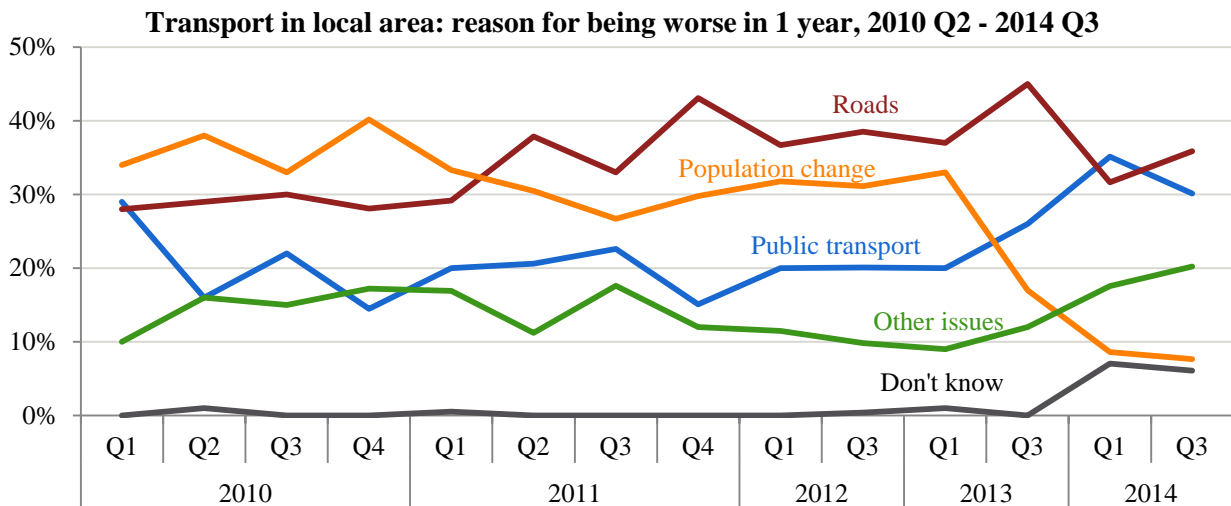


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- Public transport services and roads are the main reasons for residents to believe that their local transport will be better (top figure) or worse (bottom figure) in one year. However, public transport services are more likely to be the reason for believing better transport (42% due to public transport vs. 25% due to roads) while roads are more likely the reason for saying worse in one year's time.



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.



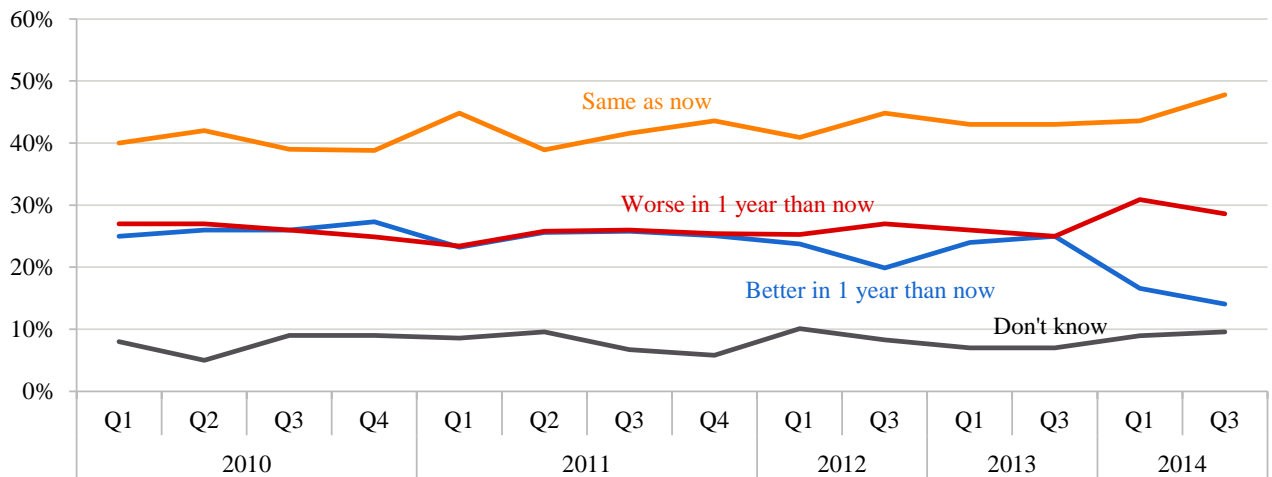
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

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?

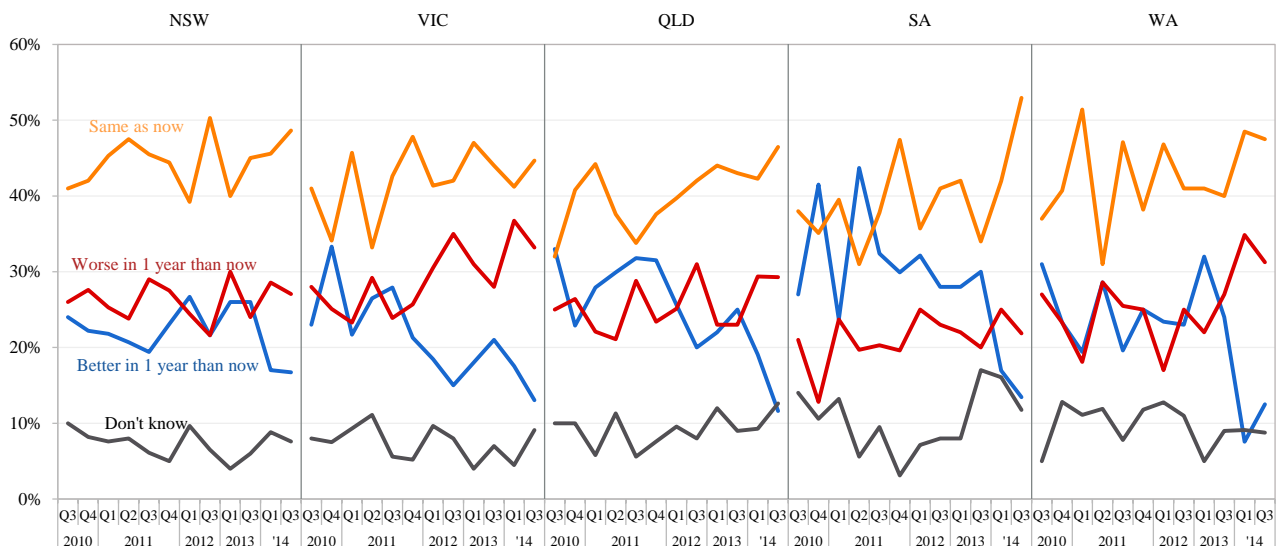
- In the September 2014 quarter, 48% of Australians said that transport in Australia in one year will be the same as now with only 14% of Australians saying that transport in Australia will be better in one year's time, slightly declining from 25% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2014 Q3



- In the September 2014 quarter, more than one third of Victoria residents said that transport in Australia will be worse in one year, and around 13% 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 17% of its residents believing that transport in Australia will be better in one year's time.

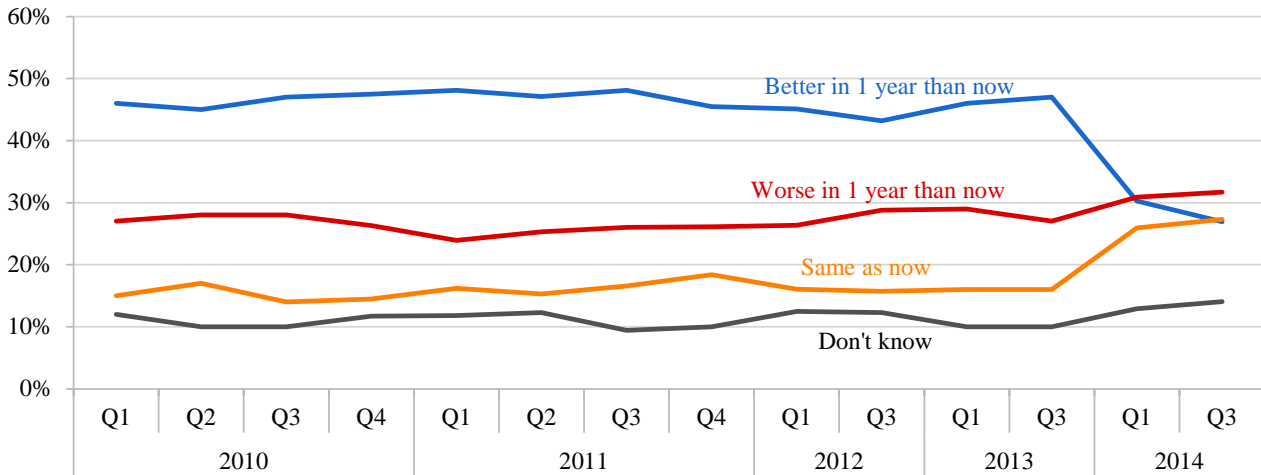
Transport in Australia in 1 year time by state, 2010 Q3 - 2014 Q3



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?

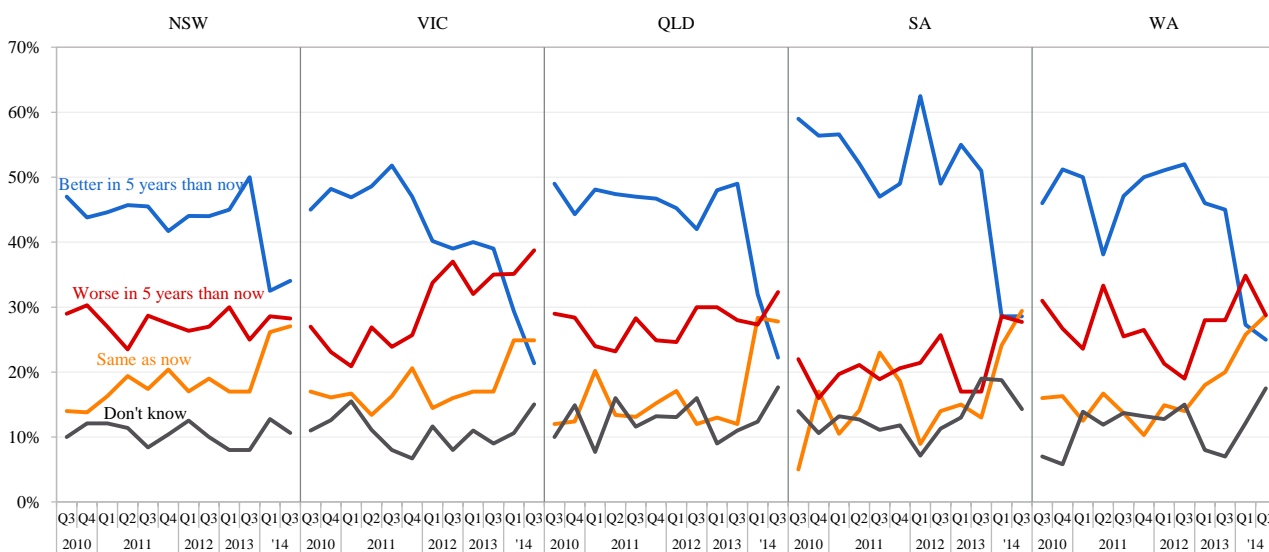
- Australians are losing confidence that transport will be better in five years than it is now. In the September 2014 quarter, less than one in three Australian residents believe transport in Australia will be better in five years. This has been continuously declining from 47% in the September 2013 quarter. In contrast, more people believe that transport in Australia will stay the same or get worse in five years' time.

Transport in Australia in 5 years, 2010 Q1 - 2014 Q3



- In the September 2014 quarter, about one third of New South Wales and South Australia residents think that transport in Australia will be better in five years than now, a little more confident than people living in other states. In contrast, people living in Victoria are least confident, where 39% respondents said that transport in Australia will be worse in five years' time.

Transport in Australia in 5 years by state, 2010 Q3 - 2014 Q3



4. Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey about transport getting better or worse were 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.

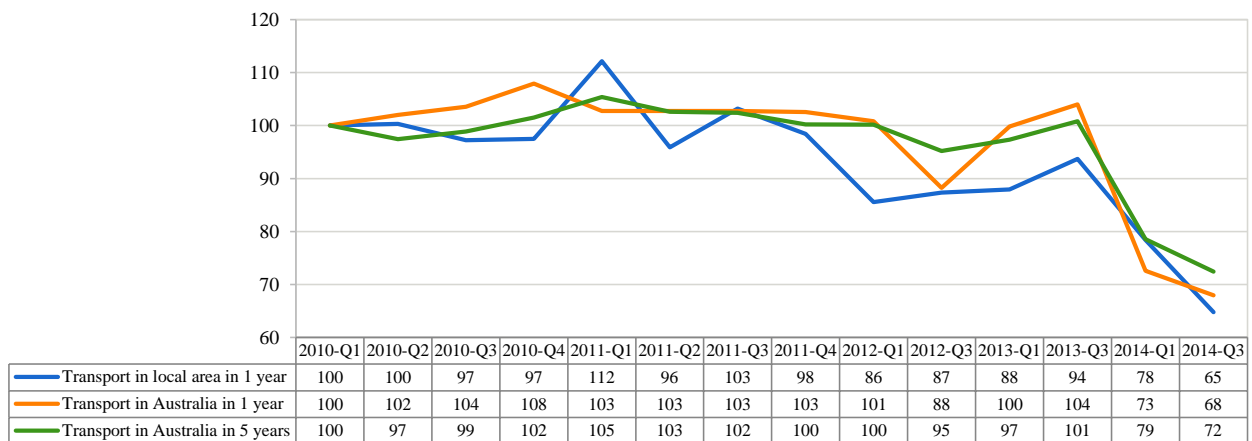
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2014 quarter as compared to the March 2014 quarter:

- 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 become less 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 2014 (Confidence index: from 100 to 65), less confident about transport in Australia in one year (Confidence index: from 100 to 68), and less confident about transport in Australia in five years (Confidence index: from 100 to 72).

ITLS TOPS Index of Transport Confidence

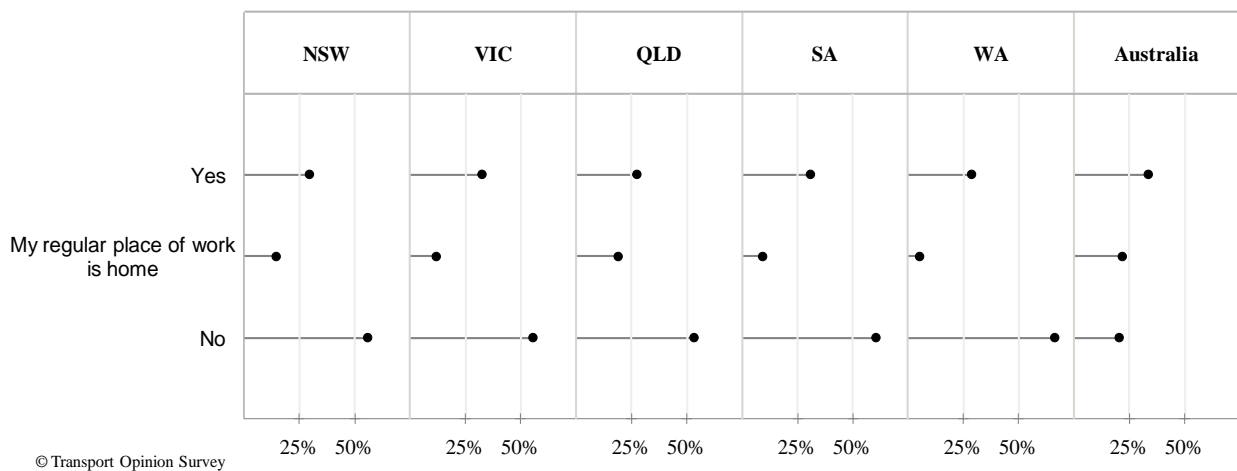


5. More than one thirds of Australians are able to work at home or telecommute

In the September 2014 quarter, two new questions were asked to seek the level of flexibility that Australian workers have in terms of their work patterns (time and location).

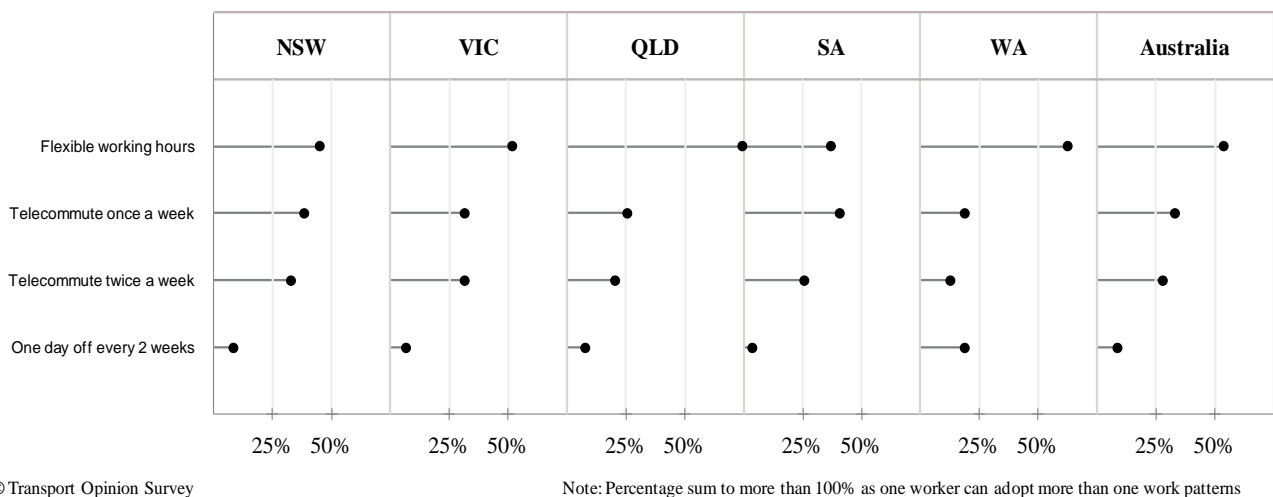
- Overall, about one in three Australian workers is able to work at home or telecommute if they want to (with or without permission from their employers). In addition, two in five workers have home as their regular workplace.
- The proportion of workers who can work at home or telecommute is quite similar across all states, ranging from 29% in Western Australia to 32% in Victoria.

Are you able to work at home or telecommuting if you want to?



- More than one in two workers who are able to work at home or telecommuting also have flexible working hours where they can choose start and finish times to avoid traffic congestion. However, this varies substantially across states with three in four workers in Queensland having flexible working hours as compared to just over one in three workers in South Australia.
- Up to one in four workers can work at home or telecommute at least two days per week but only one in ten workers can have one day off work per fortnight.

Work patterns of workers who are able to work at home or telecommuting



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

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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