

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

Quarter 3, September 2015

Highlights

Both infrastructure and transport slightly decrease as the highest priority national issue

- In the September 2015 quarter, 14% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, down from 17% in September 2014. In the September 2015 quarter, 7% of Australians nominated transport as one of the two highest priority issues in Australia today, down from 8% in September 2014.

Public transport the highest priority for transport

- In the September 2015 quarter, 37% of Australians said that the highest priority issue for transport in Australia is public transport improvements, up from 33% in September 2014. This is followed by road improvements (21%), slightly down from 22% in September 2014.

Transport not changed in local areas

- In the September 2015 quarter, 61% of Australians said that transport in their local areas is the same now as one year ago, slightly up from 58% in the September 2014 quarter.

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

- In the September 2015 quarter, only 7% of Australians said that transport in their local areas will be better in one year's time, down from 11% in the September 2014 quarter.

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

- In the September 2015 quarter, 9% of Australians think that transport in Australia will be better in one year's time, down from 14% in the September 2014 quarter.

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

- In the September 2015 quarter, 22% of Australians think that transport in Australia will be better in five years, down from 27% in the September 2014 quarter.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in September 2015 Australians are less confident about transport in their local areas (Confidence index: down from 100 to 44), and across Australia in one year (Confidence index: down from 100 to 46), and five years (Confidence index: down from 100 to 62).

Australians would spend at least the same amount of money on public transport improvements as on roads

- With an available \$100bn budget, Australians indicate that they would like to see government spend roughly the same amount of money on public transport (51%) as on roads (49%).
- With the same amount of money, three in five Australians would prefer to invest in a 30-km rail corridor than 300-kms of dedicated bus lanes.

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.

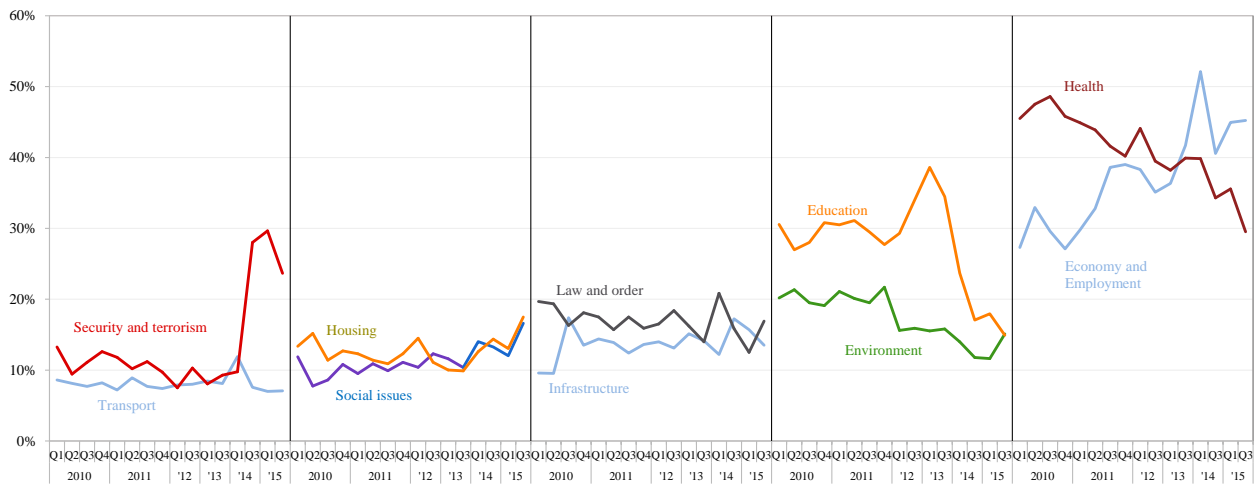
The Quarter 3, September 2015 survey was conducted between 9 and 14 September 2015. Current issues in this quarter included asking Australian residents on how would they spend \$100bn over next 5 years on transport improvements and their preferences for a 30-km rail corridor versus 300-km bus lanes.

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 2015, economy and employment continued to show up as the highest priority issue in Australia, nominated by 45% of Australians, followed by health (30%). Australians were 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 (24%).
- 17% of Australians nominated infrastructure and 7% nominated transport as one of the two highest priority issues in Australia today.

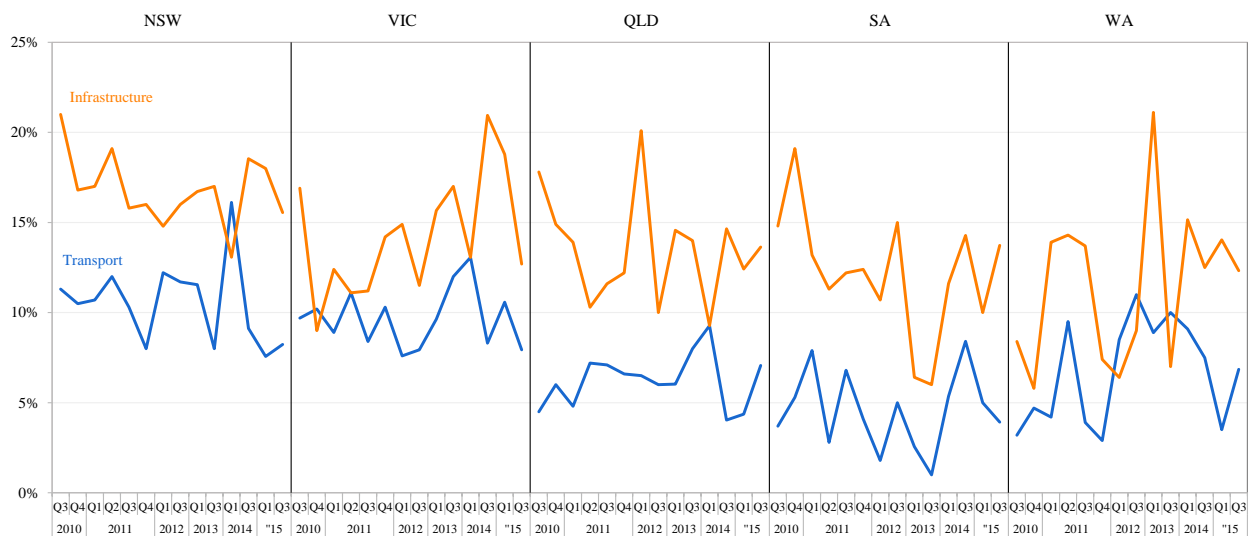
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2015 Q3



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 2015, 8% of New South Wales and Victoria residents nominated transport as a priority as compared to 4% of South Australian residents.

Transport and infrastructure as highest priority issues by state, 2010 Q3 - 2015 Q3

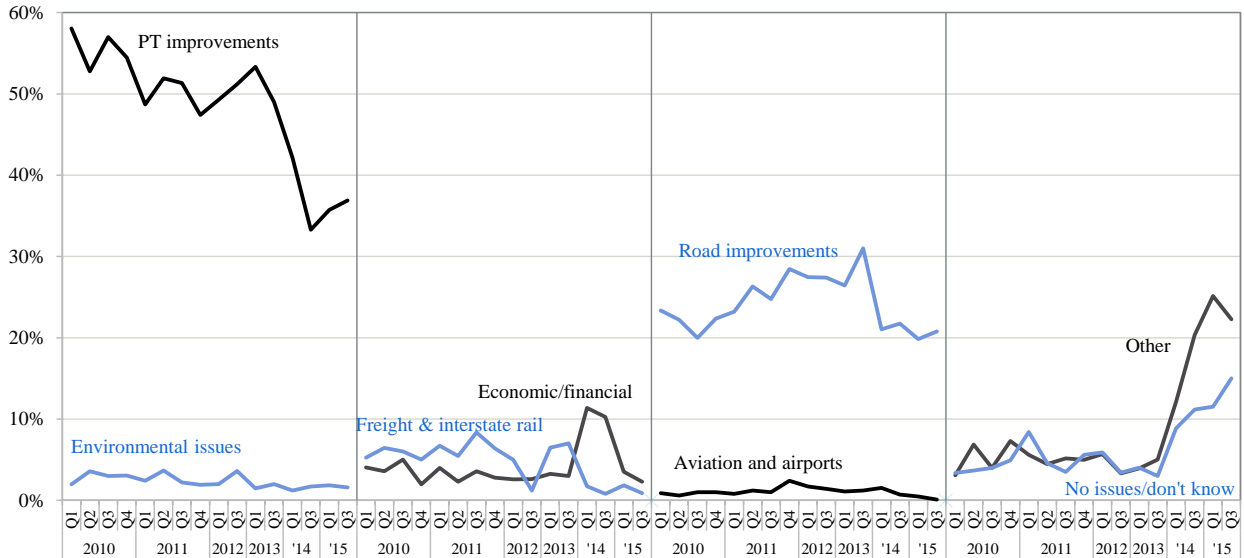


1. Highest priority issue for transport

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

- In the September 2015 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. Only one in five Australians nominated road improvements as the highest priority issue for transport in Australia.

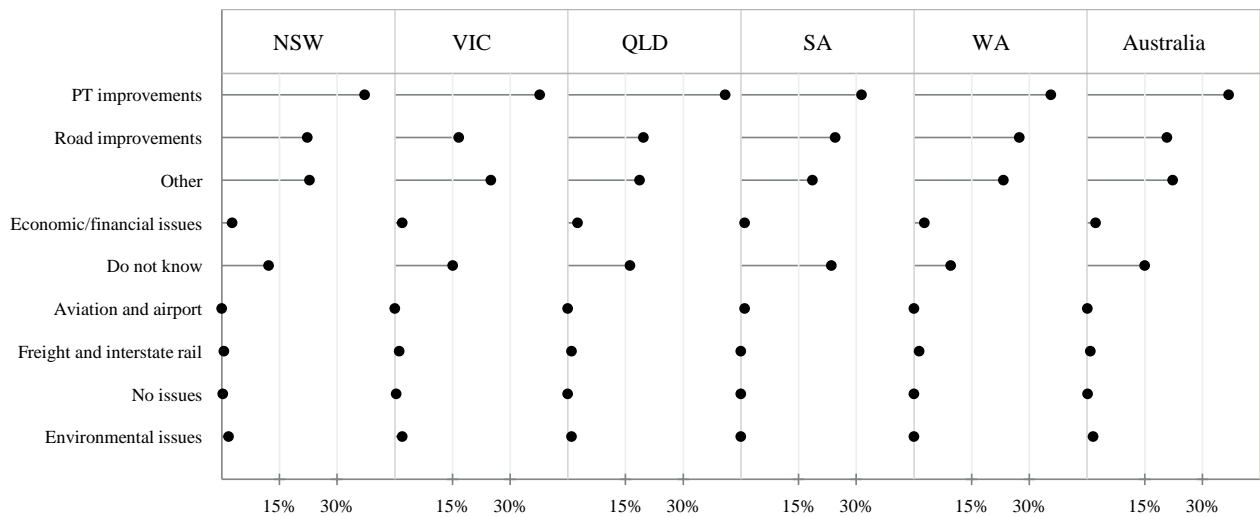
Highest priority transport issue in Australia, 2010 Q1 - 2015 Q3



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 2015 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 transport system.

Highest priority transport issue by state, 2015 Q3



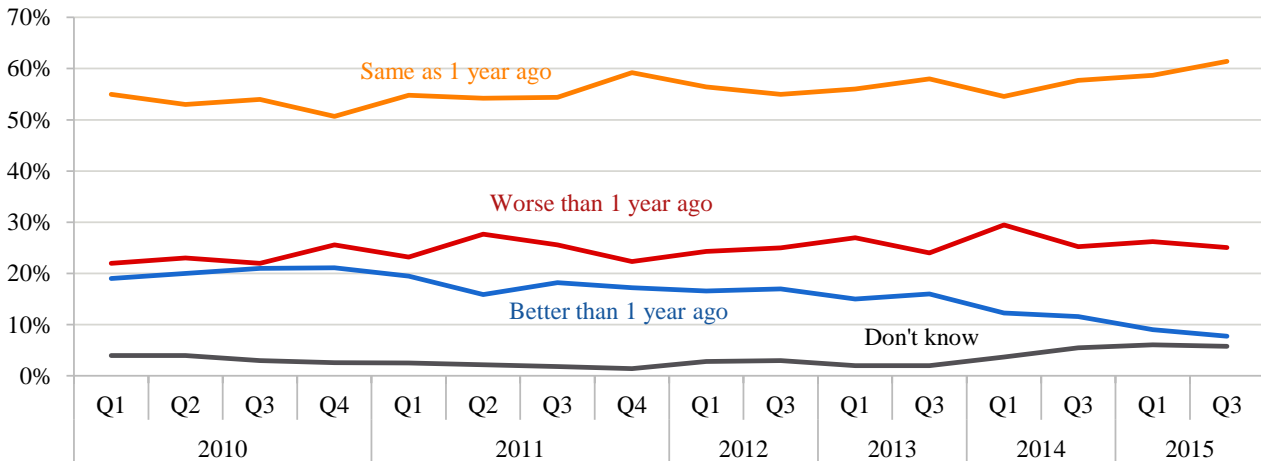
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2. Local transport does not change

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?

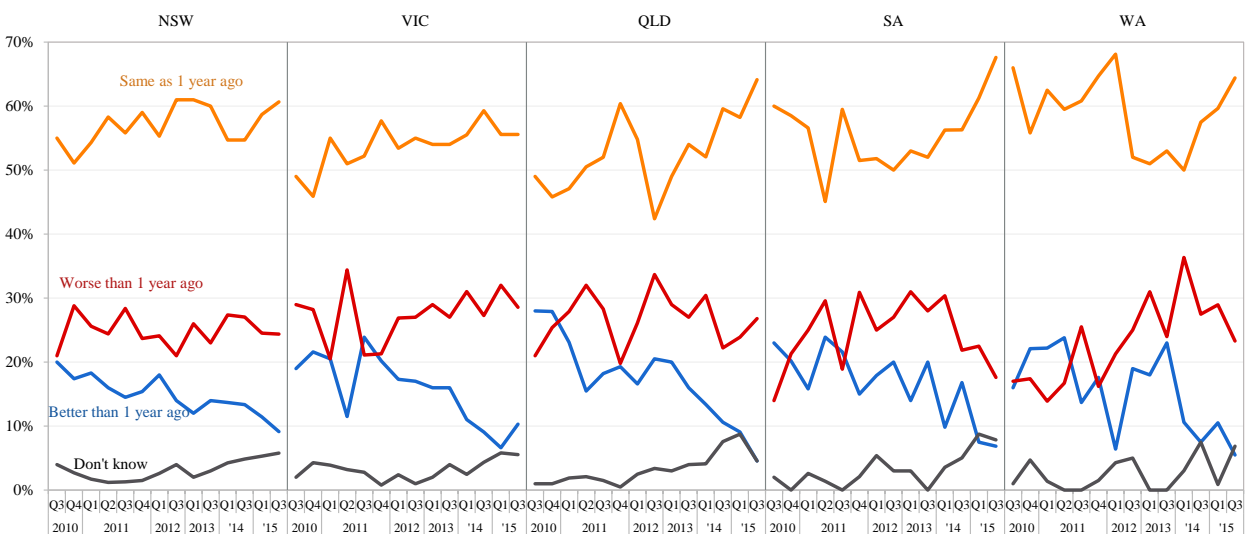
- In the third quarter of 2015, only 8% of Australians believed that transport in their local areas is better now than one year ago, while 61% of Australians said it is the same as one year ago and 25% of Australian said it is worse now than one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 Q1 - 2015 Q3



- The evaluation of transport in local area by respondents is relatively consistent across all states of Australia, where most of respondents believed it is the same as one year ago. However, there is a declining percentage of residents responding that transport in their local area is better now than one year ago except Victoria.

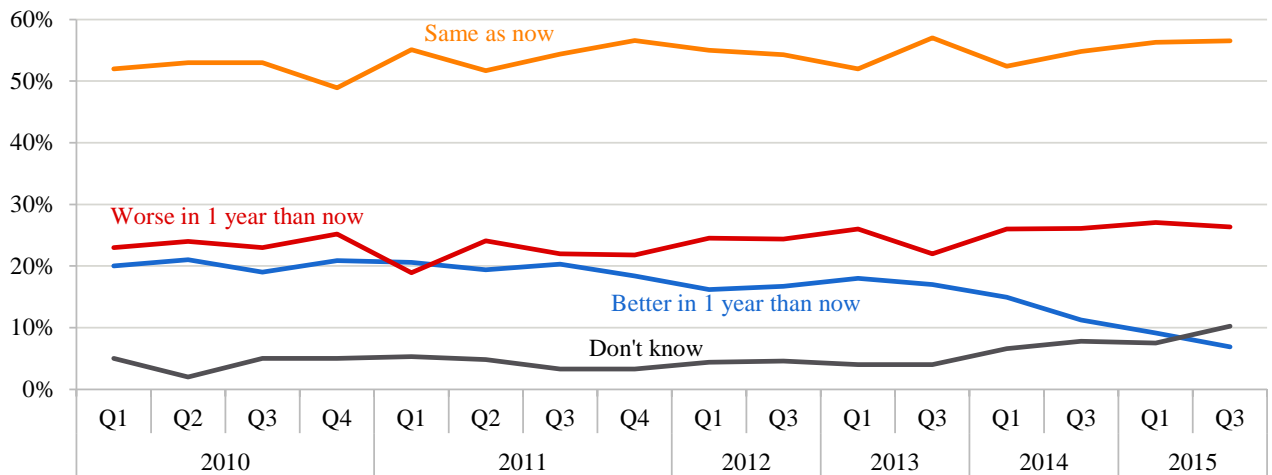
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2015Q3



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?

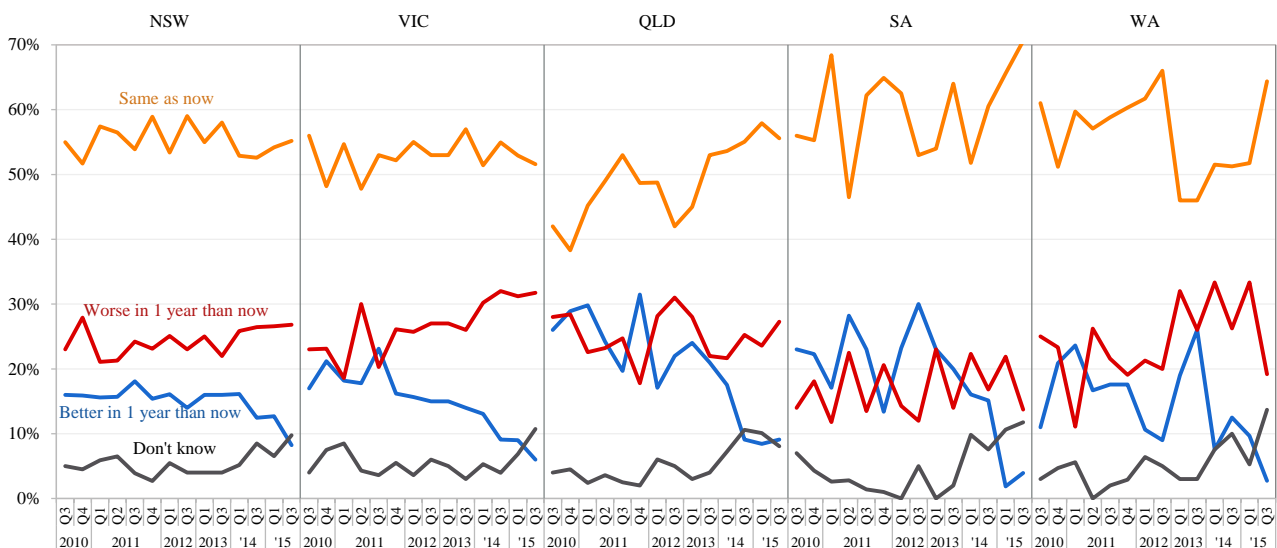
- In the September 2015 quarter, 57% of Australians said that transport in their local areas will be the same in one year's time. Only 7% said transport will be better, slightly down from one year ago at 11% in the third quarter of 2014.

Transport in local area in 1 year time across Australia, 2010 Q1 - 2015 Q3



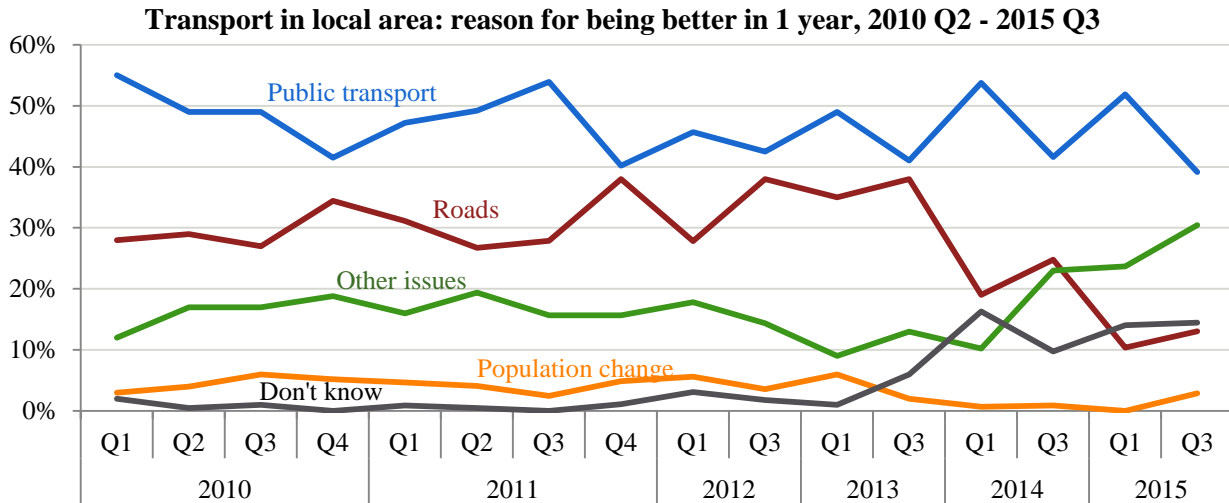
- 9% of Queensland residents believed that transport in their local area will be better in one year's time; while only 3% of Western Australia residents believed the same will happen to their local transport. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 Q3 - 2015 Q3

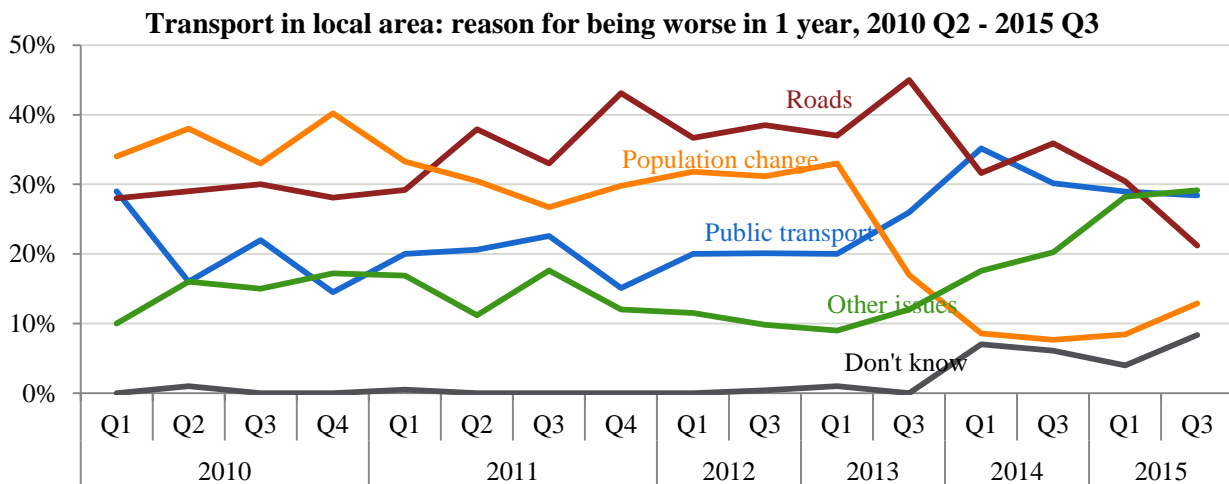


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- Public transport services are the main reasons for residents to believe that their local transport will be better (top figure) or worse (bottom figure) in one year. In addition to public transport and roads, the other issues, including economic and financial issues, government role in transport, and environmental issues, continued to climb up as main reasons for residents to believe that their local transport will be better or 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.



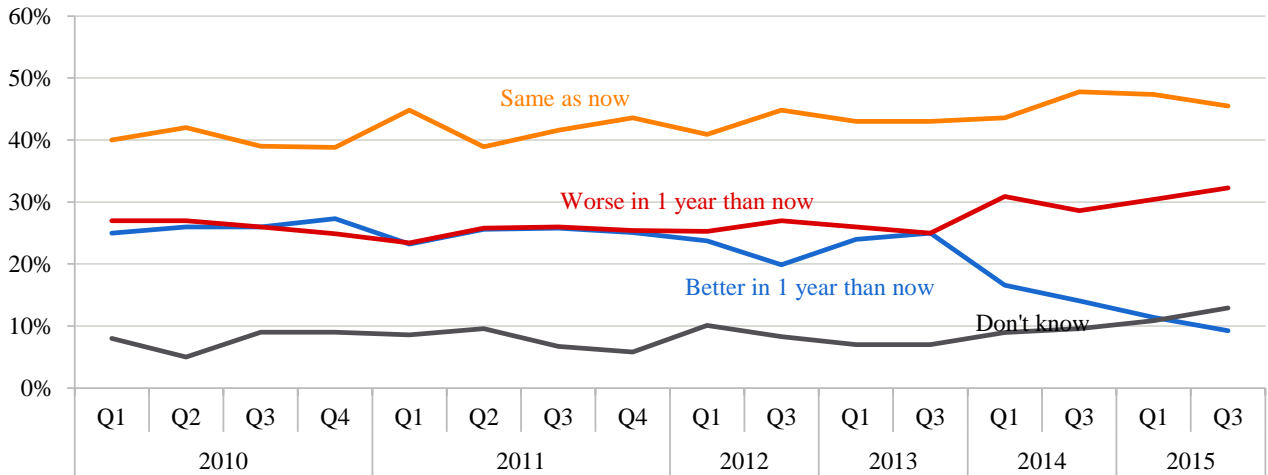
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

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?

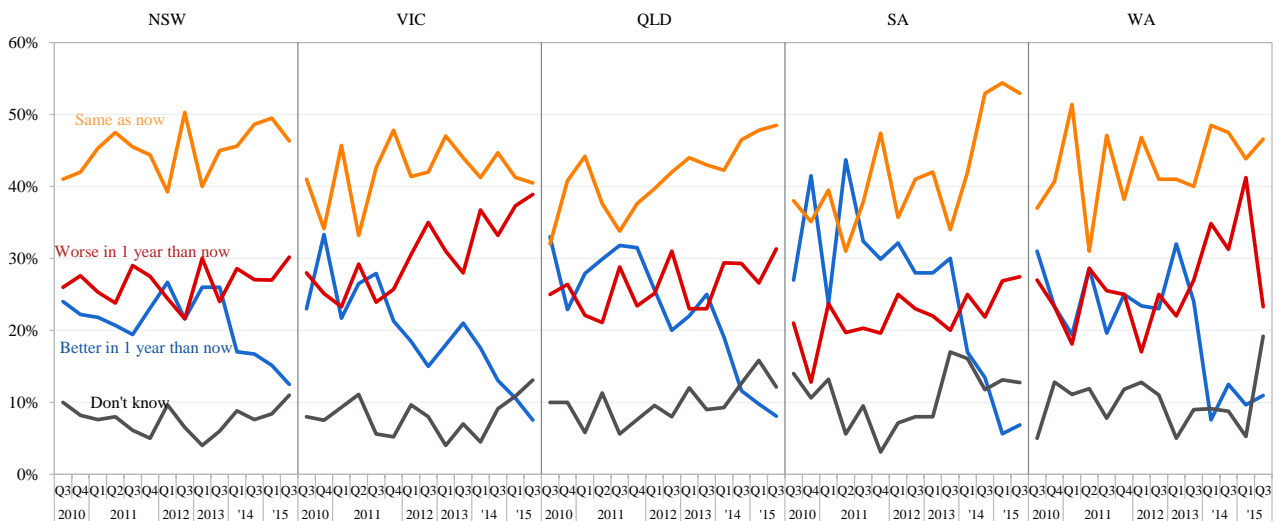
- In the September 2015 quarter, 46% of Australians said that transport in Australia in one year will be the same as now with only 9% of Australians saying that transport in Australia will be better in one year's time, slightly down from 14% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2015 Q3



- In the September 2015 quarter, nearly 40% of Victoria residents said that transport in Australia will be worse in one year, and only around 8% 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 13% of its residents believing that transport in Australia will be better in one year's time.

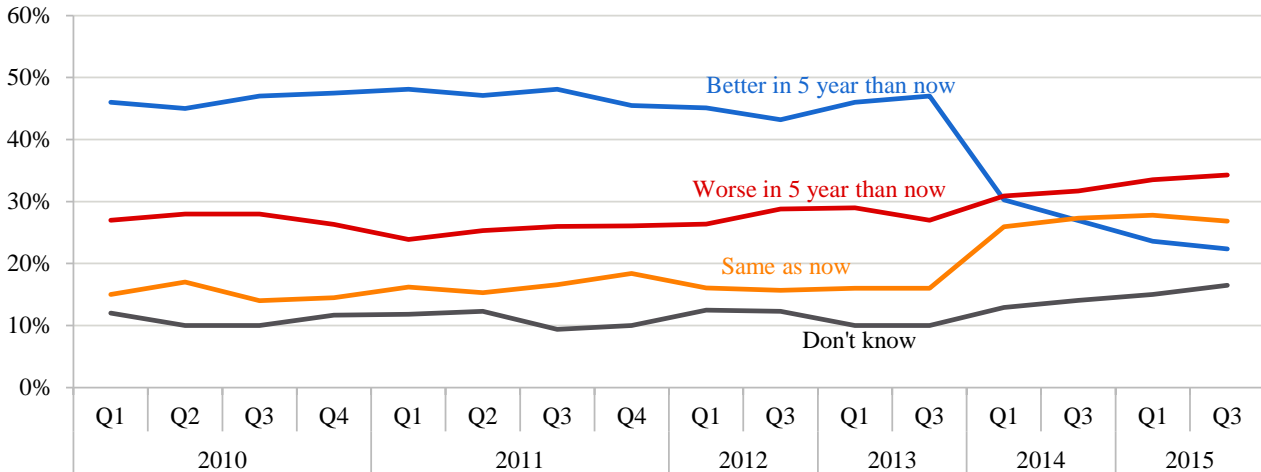
Transport in Australia in 1 year time by state, 2010 Q3 - 2015 Q3



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?

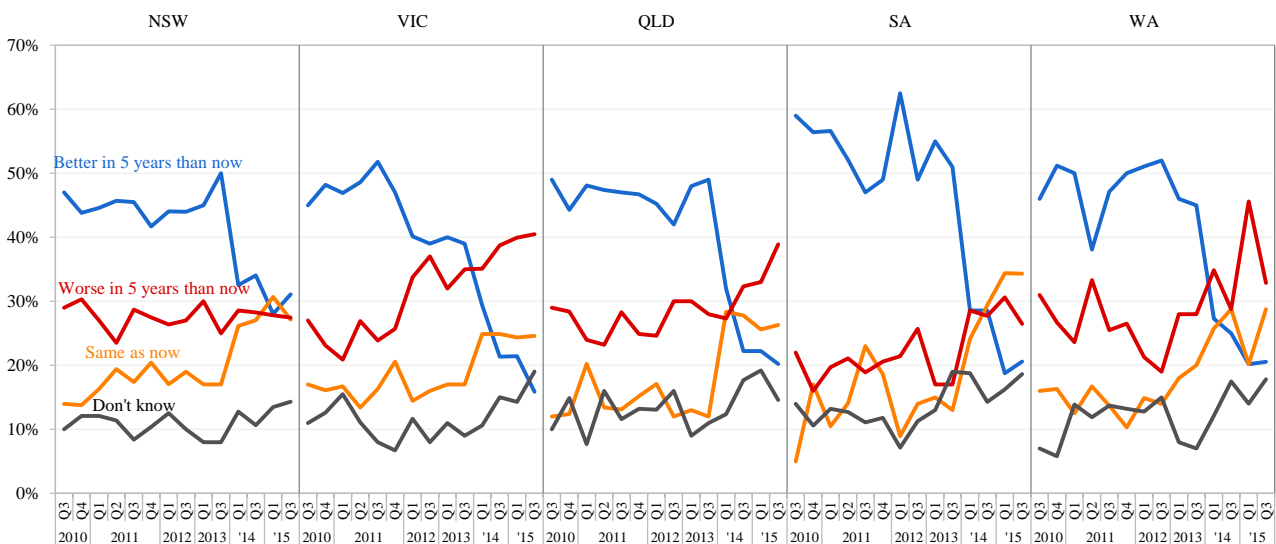
- Australians are losing confidence that transport will be better in five years than it is now. In the September 2015 quarter, less than one in four Australian residents believe transport in Australia will be better in five years. This has been continuously declining from 47% in the September 2013 quarter. 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 - 2015 Q3



- In the September 2015 quarter, about 31% New South Wales residents think that transport in Australia will be better in five years than now, much more confident than people living in other states. In contrast, people living in Victoria are least confident, where 40% respondents said that transport in Australia will be worse in five years' time.

Transport in Australia in 5 years by state, 2010 Q3 - 2015 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.

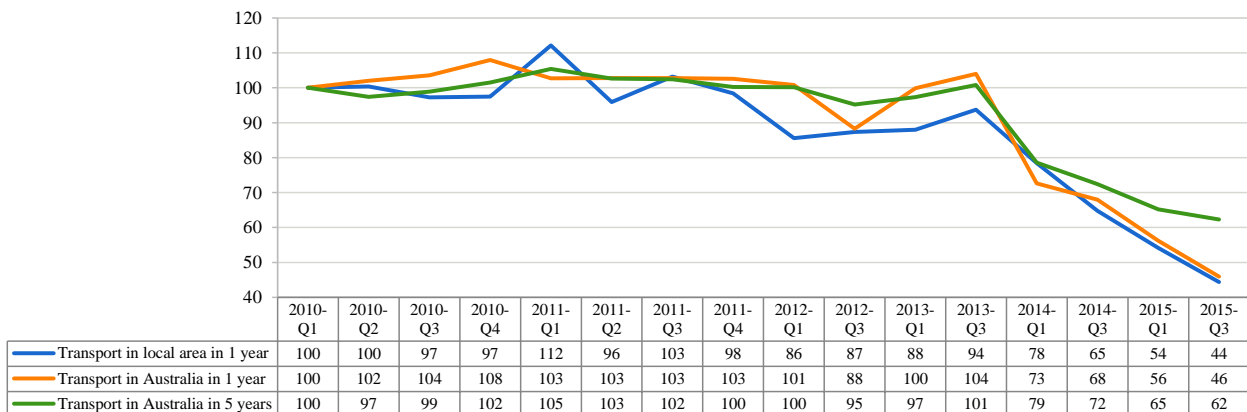
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2015 quarter as compared to the September 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 September 2015 (Confidence index: from 100 to 44), less confident about transport in Australia in one year (Confidence index: from 100 to 46), and less confident about transport in Australia in five years (Confidence index: from 100 to 62). There has been a very strong decline in confidence since September 2013. These findings are based on the period in September just prior to a change in Federal Government leadership.

ITLS TOPS Index of Transport Confidence



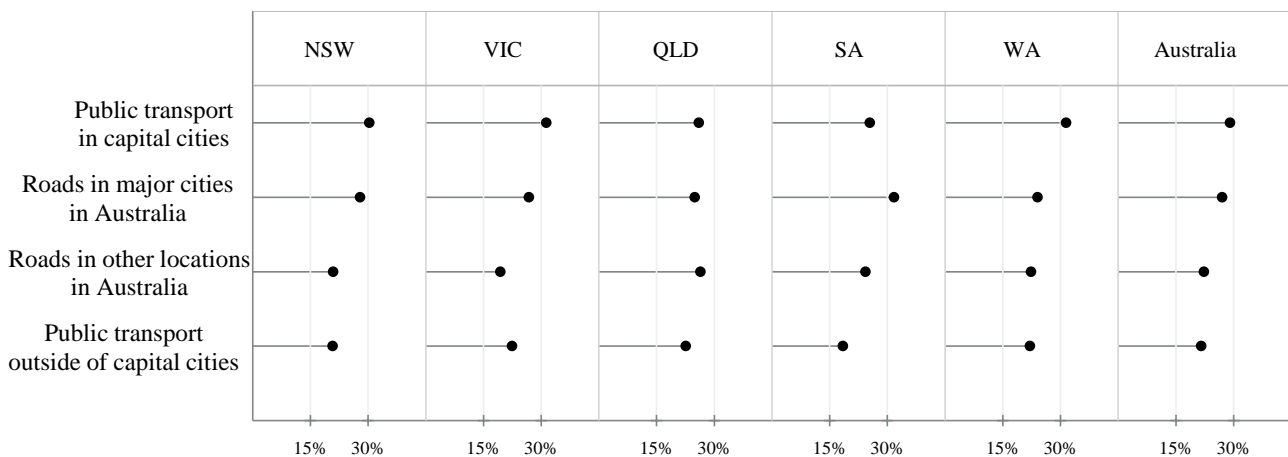
5. Australians would spend at least the same amount of money on public transport improvements as on roads

In the September 2015 quarter, two new questions were asked to understand public opinion on transport improvement spending and public preferences for bus and rail investment in Australia.

If you were asked to spend \$100bn over the next 5 years on transport improvements, what percent would you spend on roads and public transport?

- On average, Australian residents would like to spend roughly the same amount of money on public transport (51%) as on roads (49%), with a slightly higher percentage of spending on transport improvements in major cities and capital cities.
- The public opinion on how to spend \$100bn over the next 5 years on transport improvements varies across all states. South Australia residents would like to spend slightly more on roads (57%) than public transport (43%), while Western Australia and Victoria residents would like to spend slightly more on public transport (54%) than roads (46%). For Queensland and New South Wales residents, they would like to equally split the budget for public transport and road improvements in Australia.

Where you would spend \$100bn over the next 5 years on transport improvement

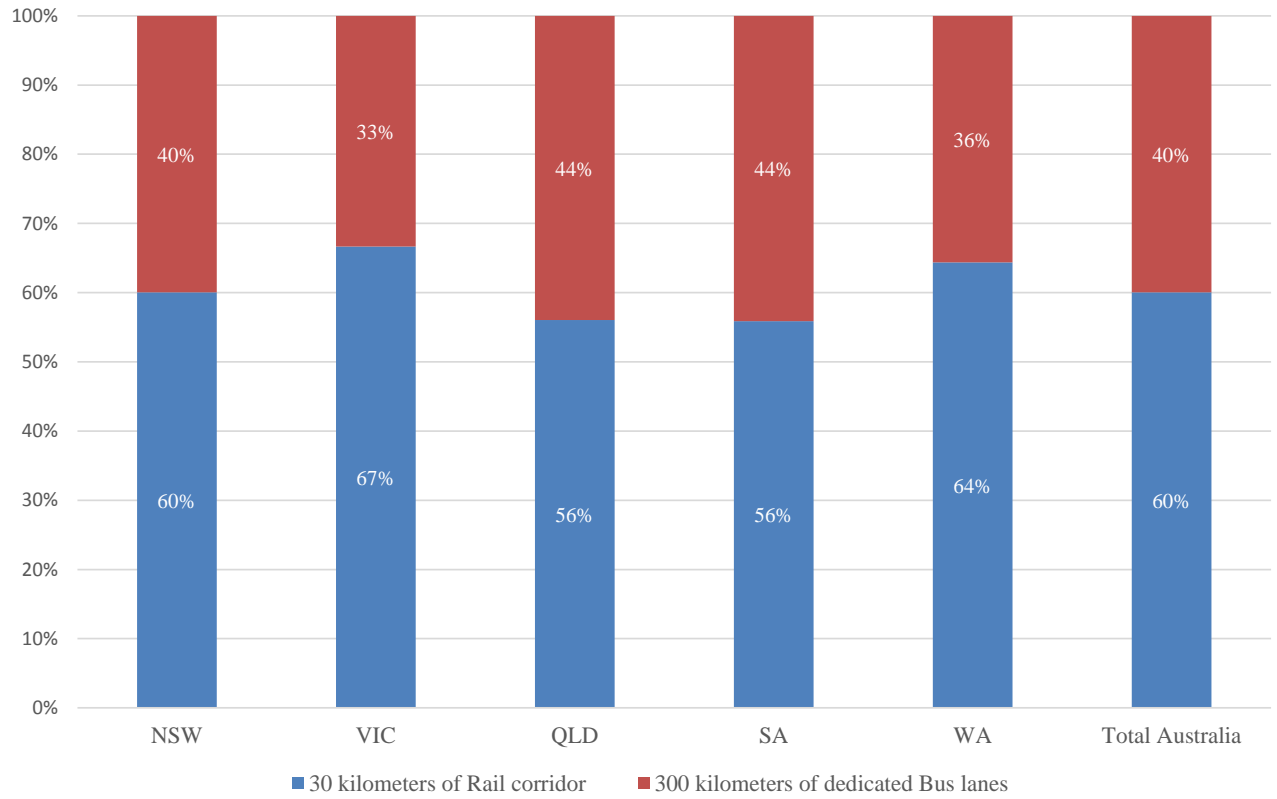


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If you could choose between spending the same amount of money on either 30 kms of one new rail corridor or 300 kms of dedicated bus lanes spread around a capital city, which would you choose?

- Overall, with the same budget, three in five Australia residents would prefer to invest in 30 kms of rail corridor than 300 kms of dedicated bus lanes.
- The preference for rail and bus slightly varies across states. Compared to other states, Victoria has a higher percentage of its residents (67%) voting for investing in a new rail corridor. Queensland and South Australia are the two states with a relatively higher percentage of the population (44%) supporting dedicated bus lanes.

Preferences for 300-km bus lanes versus 30-km rail corridor



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

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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