

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

Quarter 1, March 2016

Highlights

Infrastructure increases while transport decreases as the highest priority national issue

- In the March 2016 quarter, 19% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, up from 16% in March 2015. In the September 2015 quarter, 6% of Australians nominated transport as one of the two highest priority issues in Australia today, slightly down from 7% in March 2015.

Public transport the highest priority for transport

- In the March 2016 quarter, 32% of Australians said that the highest priority issue for transport in Australia is public transport improvements, down from 36% in March 2015. This is followed by other issues (29%) and road improvements (21%).

Transport not changed in local areas

- In the March 2016 quarter, 56% of Australians said that transport in their local areas is the same now as one year ago, slightly down from 59% in the March 2015 quarter.

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

- In the March 2016 quarter, only 8% of Australians said that transport in their local areas will be better in one year's time, slightly down from 9% in the March 2015 quarter.

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

- In the March 2016 quarter, 9% of Australians think that transport in Australia will be better in one year's time, slightly down from 11% in the March 2015 quarter.

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

- In the March 2016 quarter, 22% of Australians think that transport in Australia will be better in five years, slightly down from 24% in the March 2015 quarter.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in March 2016 Australians are less confident about transport in their local areas (Confidence index: down from 100 to 47), and across Australia in one year (Confidence index: down from 100 to 46), and five years (Confidence index: down from 100 to 61).

The average commute tolerance for Australians is 37 minutes

- On average, Australian residents could tolerate about 37 minutes of commuting each way on a daily basis, and this time is relatively constant over different states.

One in four Australian trips experience traffic congestion caused by vehicle accidents

- Overall, Australia residents reported that they have experienced traffic congestion caused by vehicle accidents/breakdowns in about 25% of their daily trips.

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 2016 survey was conducted between 2 and 14 March 2015. This is the second wave of the longitudinal panel survey launched in March 2015. This report is based on the data from 1,483 completed

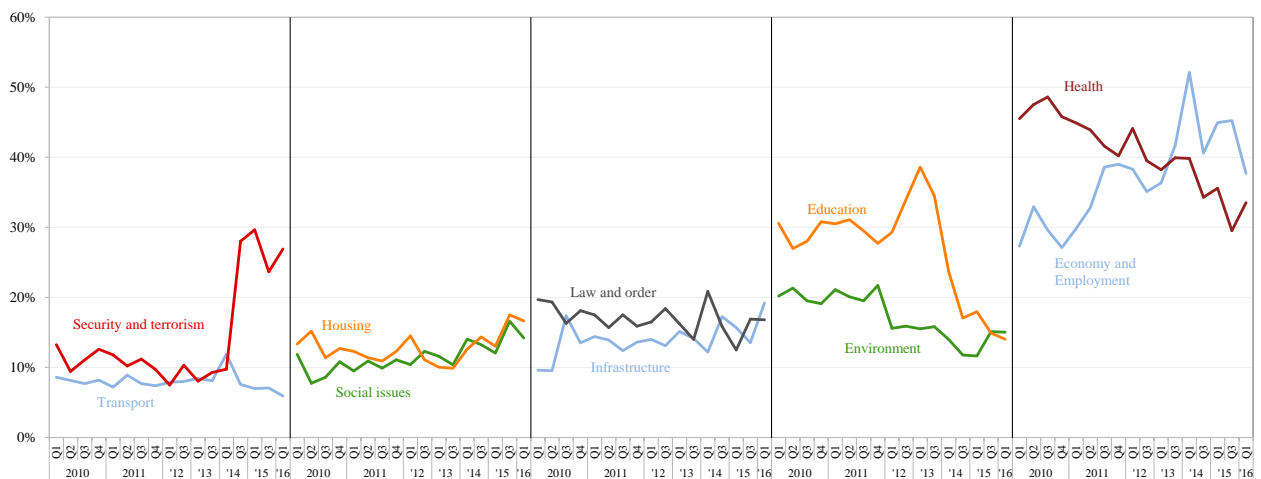
responses, including 966 repeated samples from the Wave 1 and 517 fresh samples. Current issues in this quarter included asking Australian residents on the tolerable amount of time to they would spend commuting each way on a daily basis and what percent of their trips experience traffic congestion that is caused by vehicle accidents/breakdowns.

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 2016, the economy and employment continued to show up as the highest priority issue in Australia, nominated by 38% of Australians, followed by health (34%). 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 (27%).
- 19% of Australians nominated infrastructure and 6% nominated transport as one of the two highest priority issues in Australia today.

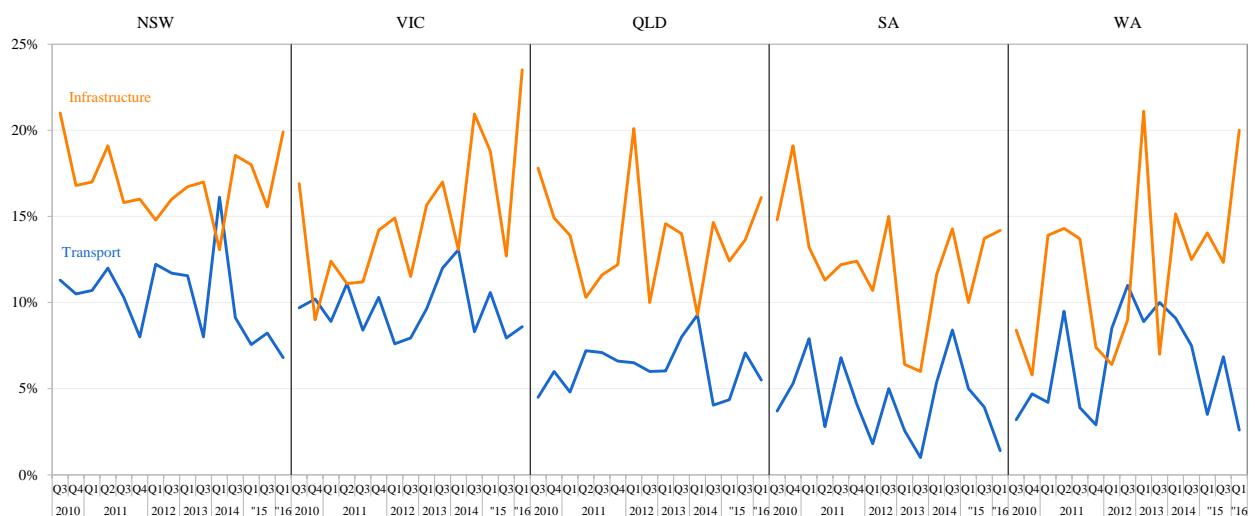
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2016 Q1



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 2016, 9% of Victoria residents nominated transport as a priority as compared to 1% of South Australian residents.

Transport and infrastructure as highest priority issues by state, 2010 Q3 - 2016 Q1



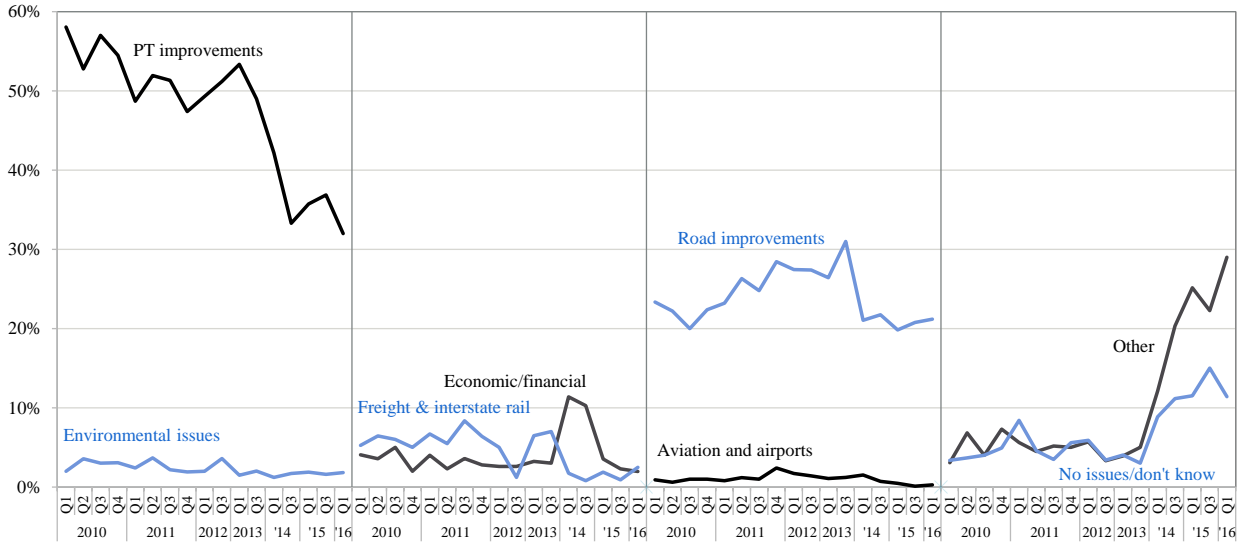
1. Highest priority issue for transport

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

- In the March 2016 quarter, 32% 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.

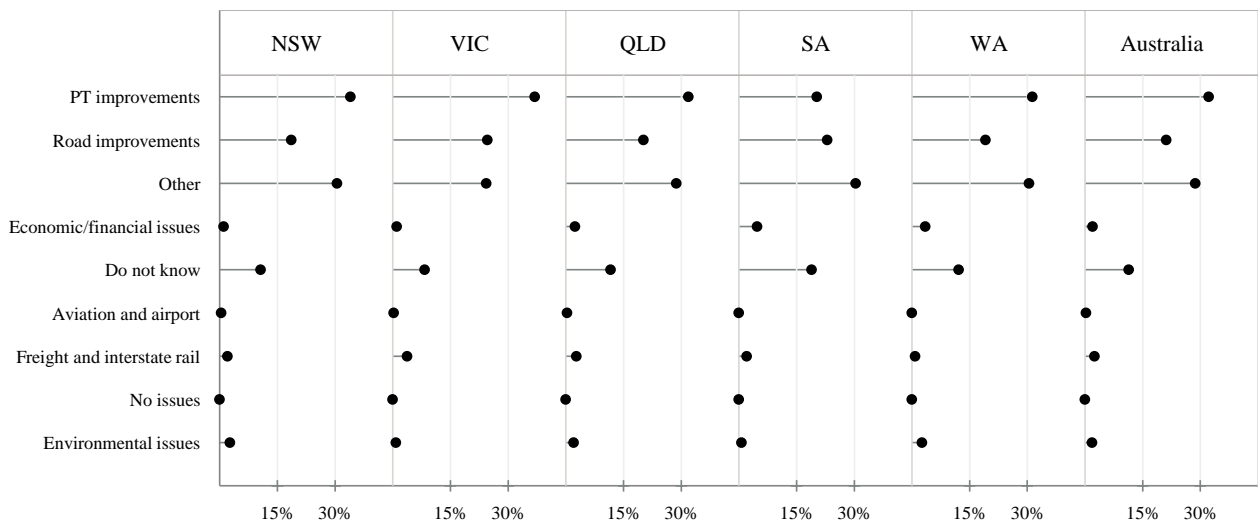
Highest priority transport issue in Australia, 2010 Q1 - 2016 Q1



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 2016 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, 2016 Q1



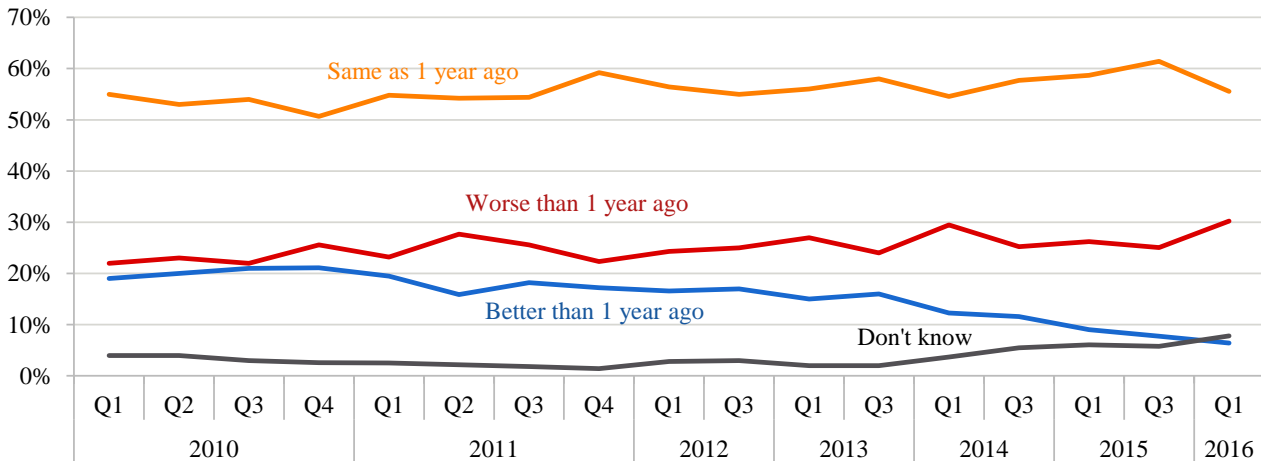
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2. Local transport does not change

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?

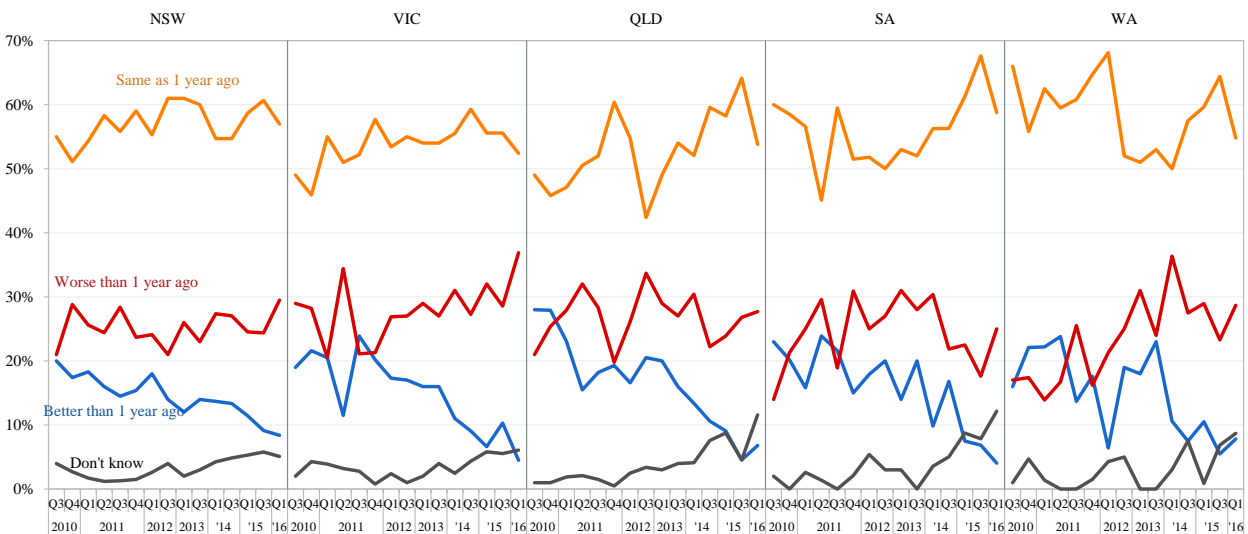
- In the first quarter of 2016, only 6% of Australians believed that transport in their local areas is better now than one year ago, while 56% of Australians said it is the same as one year ago and 30% of Australian said it is worse now than one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 Q1 - 2016 Q1



- 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 Queensland and Western Australia.

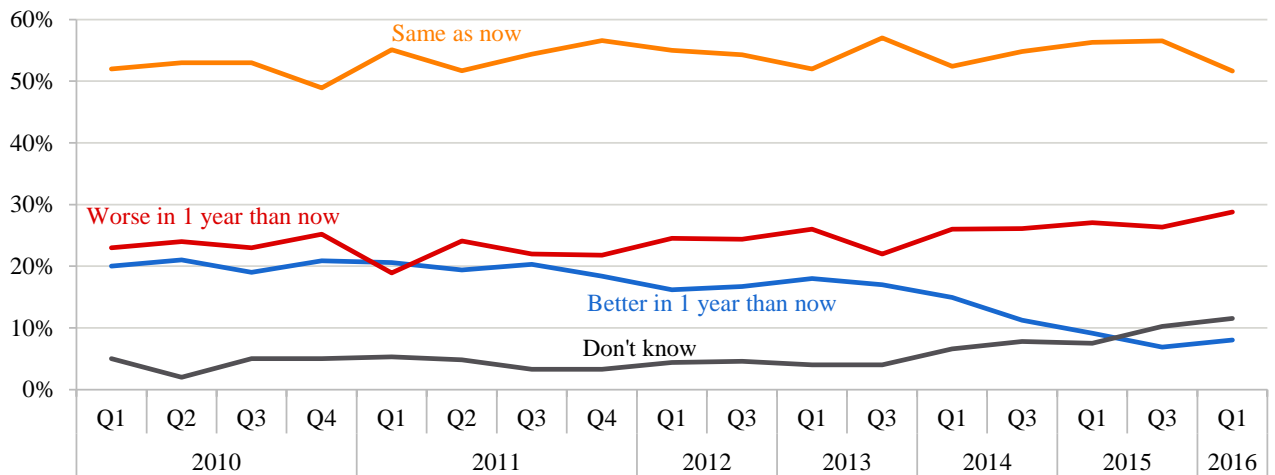
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2016 Q1



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?

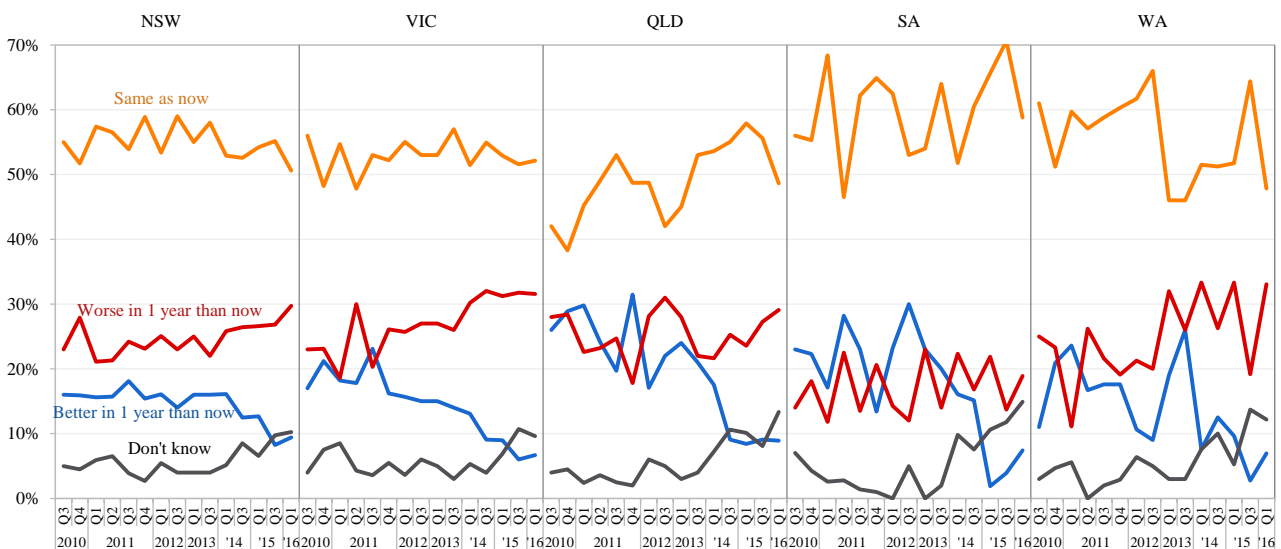
- In the March 2016 quarter, 52% of Australians said that transport in their local areas will be the same in one year's time. Only 8% said transport will be better, slightly down from one year ago at 9% in the first quarter of 2015.

Transport in local area in 1 year time across Australia, 2010 Q1 - 2016 Q1



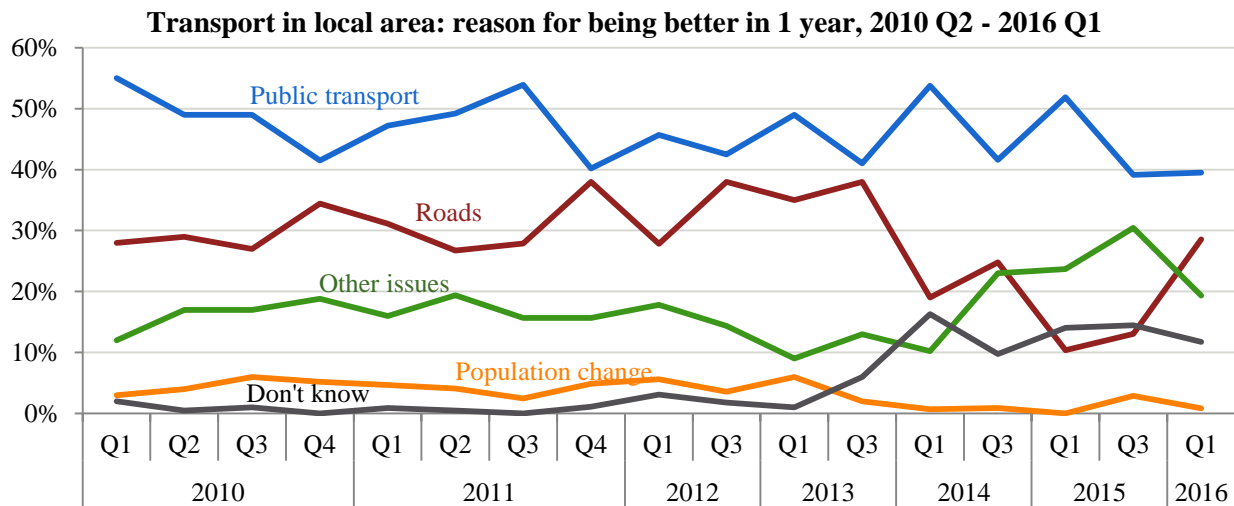
- 9% of New South Wales residents believed that transport in their local area will be better in one year's time; while 33% of Western Australia residents believed that transport in their local area will be worse in one year's time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 Q3 - 2016 Q1

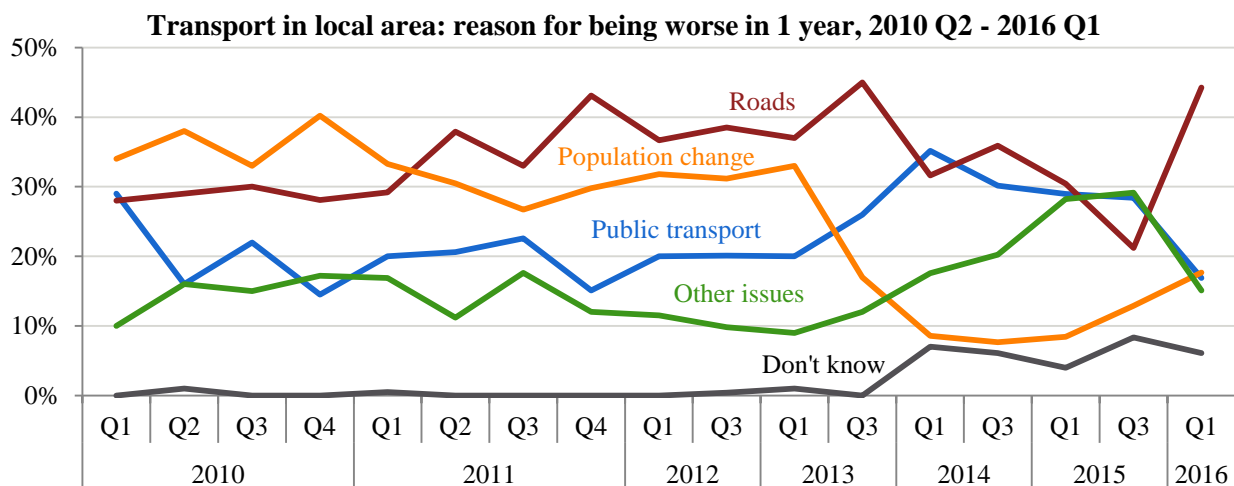


What were you thinking of most when answering that question [about transport in your local area in 1 year's time?

- 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 and roads, 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.



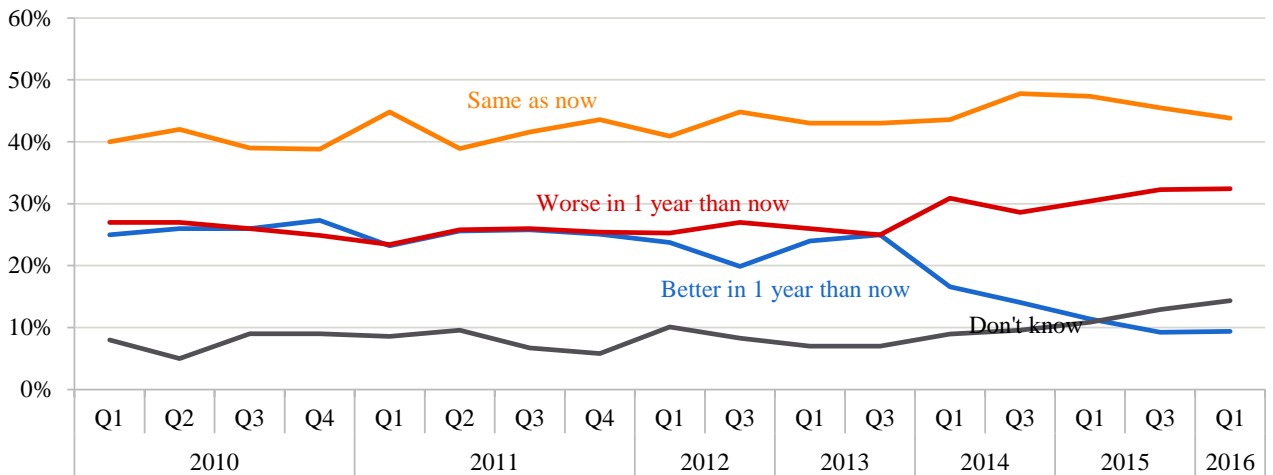
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

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?

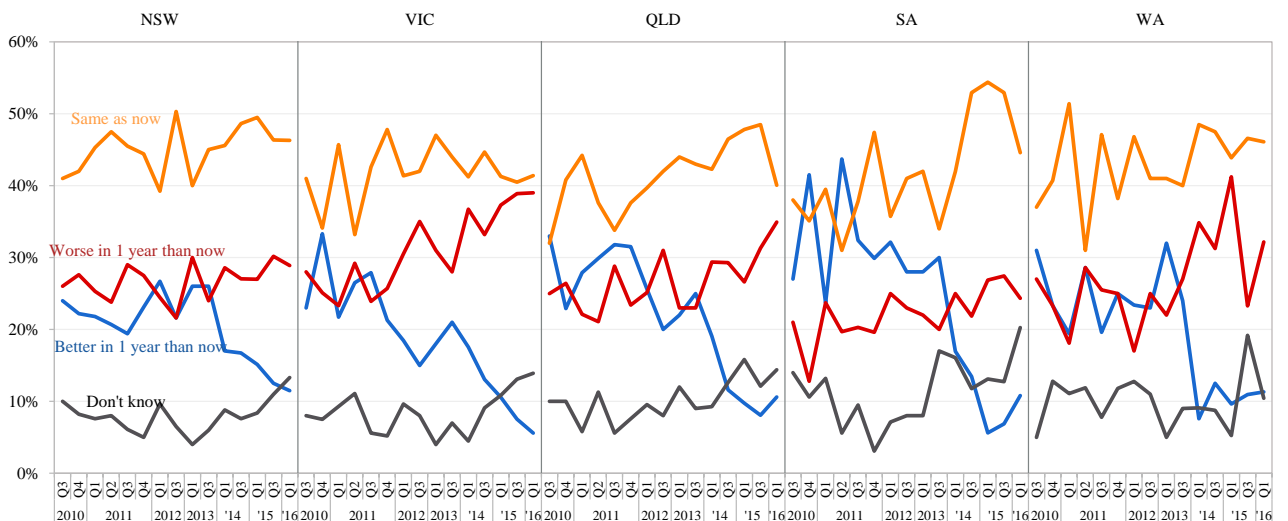
- In the March 2016 quarter, 44% of Australians said that transport in Australia in one year will be the same as now with only 9% of Australians saying that transport in Australia will be better in one year's time, slightly down from 11% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2016 Q1



- In the March 2016 quarter, nearly 40% of Victorian residents said that transport in Australia will be worse in one year, and only around 6% 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 12% of its residents believing that transport in Australia will be better in one year's time.

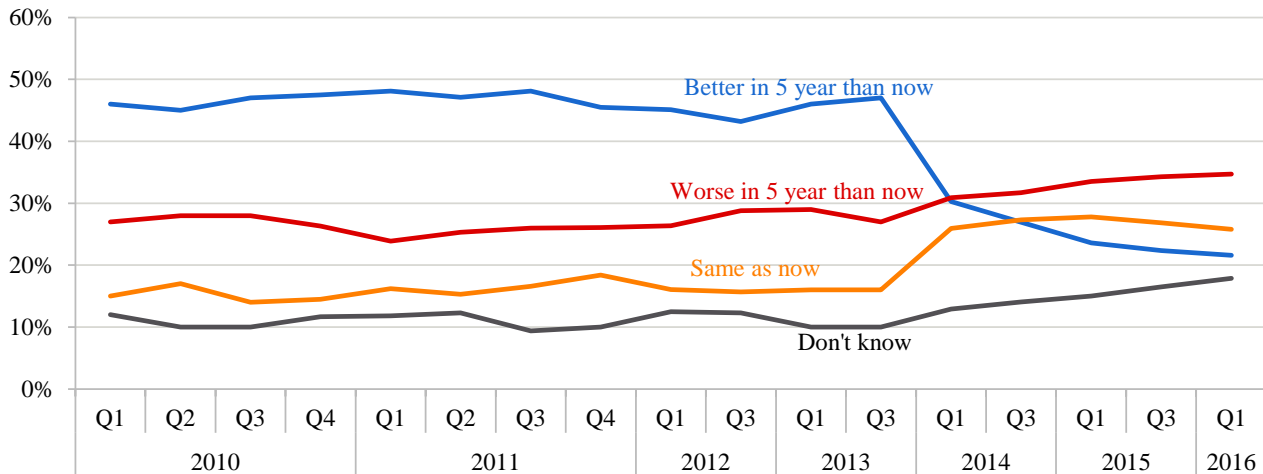
Transport in Australia in 1 year time by state, 2010 Q3 - 2016 Q1



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?

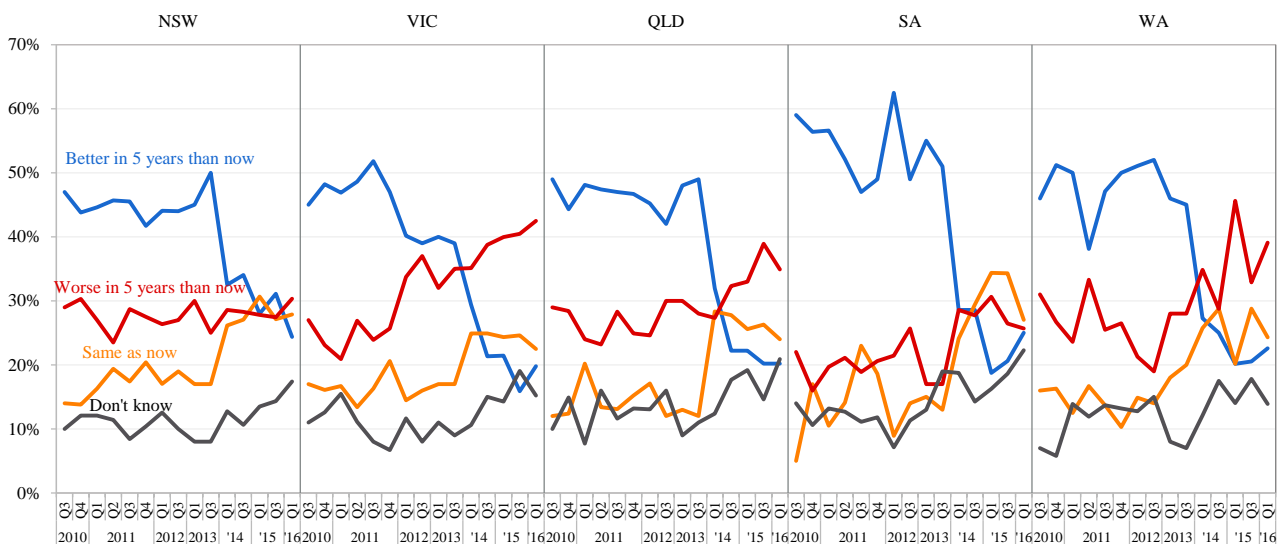
- Australians are losing confidence that transport will be better in five years than it is now. In the March 2016 quarter, less than one in four Australian residents believe transport in Australia will be better in five years. This has been continuously declining from 47% in the September 2013 quarter. 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 - 2016 Q1



- In the March 2016 quarter, about 25% 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 43% respondents said that transport in Australia will be worse in five years' time.

Transport in Australia in 5 years by state, 2010 Q3 - 2016 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.

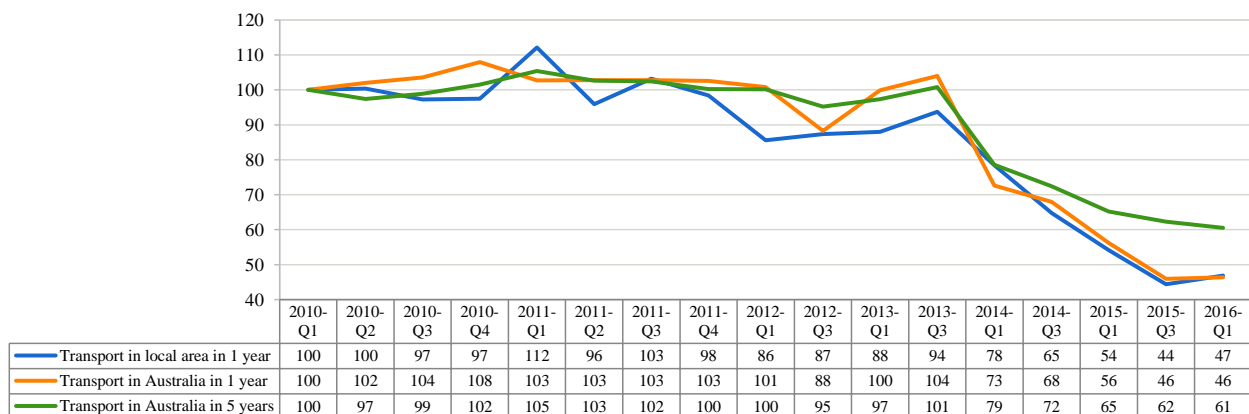
A TOPS Index value of more than 100 means that Australians’ confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2016 quarter as compared to the March 2015 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 2016 (Confidence index: from 100 to 47), 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 61). There has been a very strong decline in confidence since September 2013.

ITLS TOPS Index of Transport Confidence

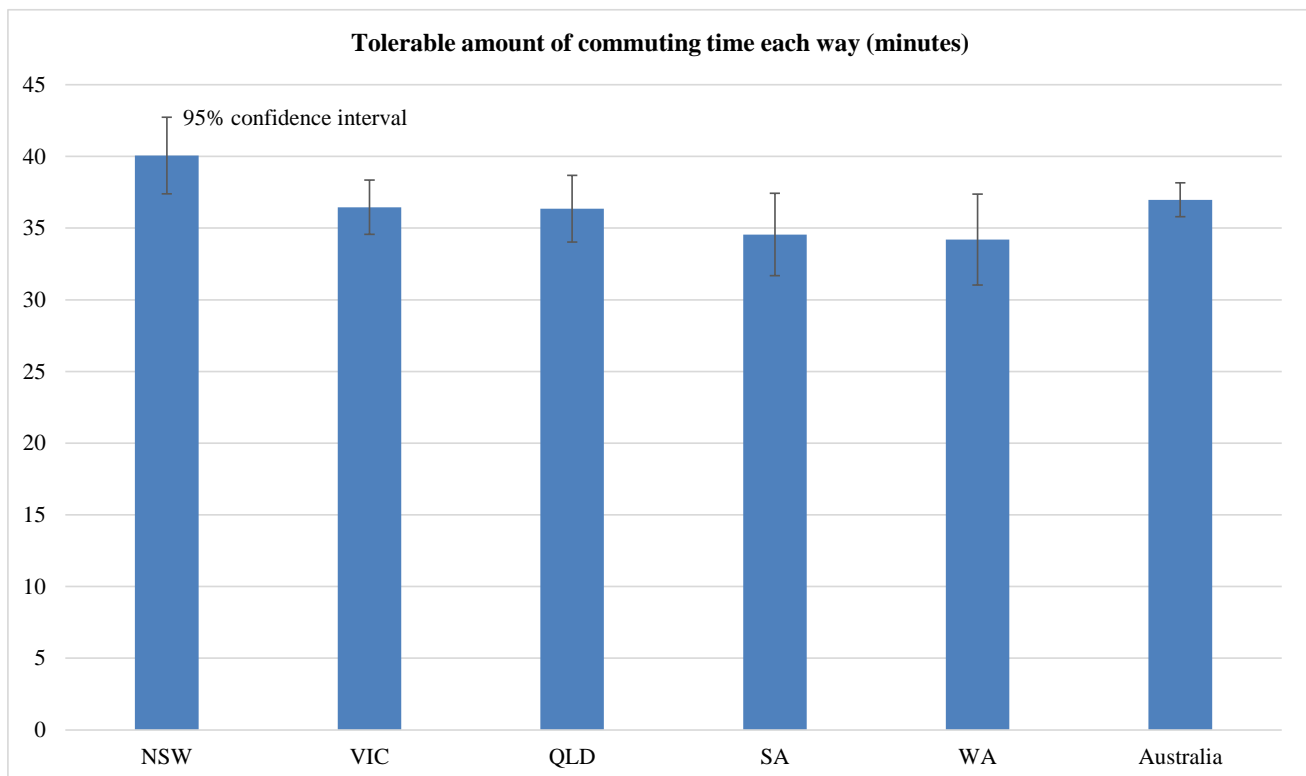


5. The average commute tolerance for Australians is 37 minutes

In the March 2016 quarter, two new questions were asked to understand public opinion on tolerable commuting times and public experience of traffic congestion caused by vehicle accidents/breakdowns.

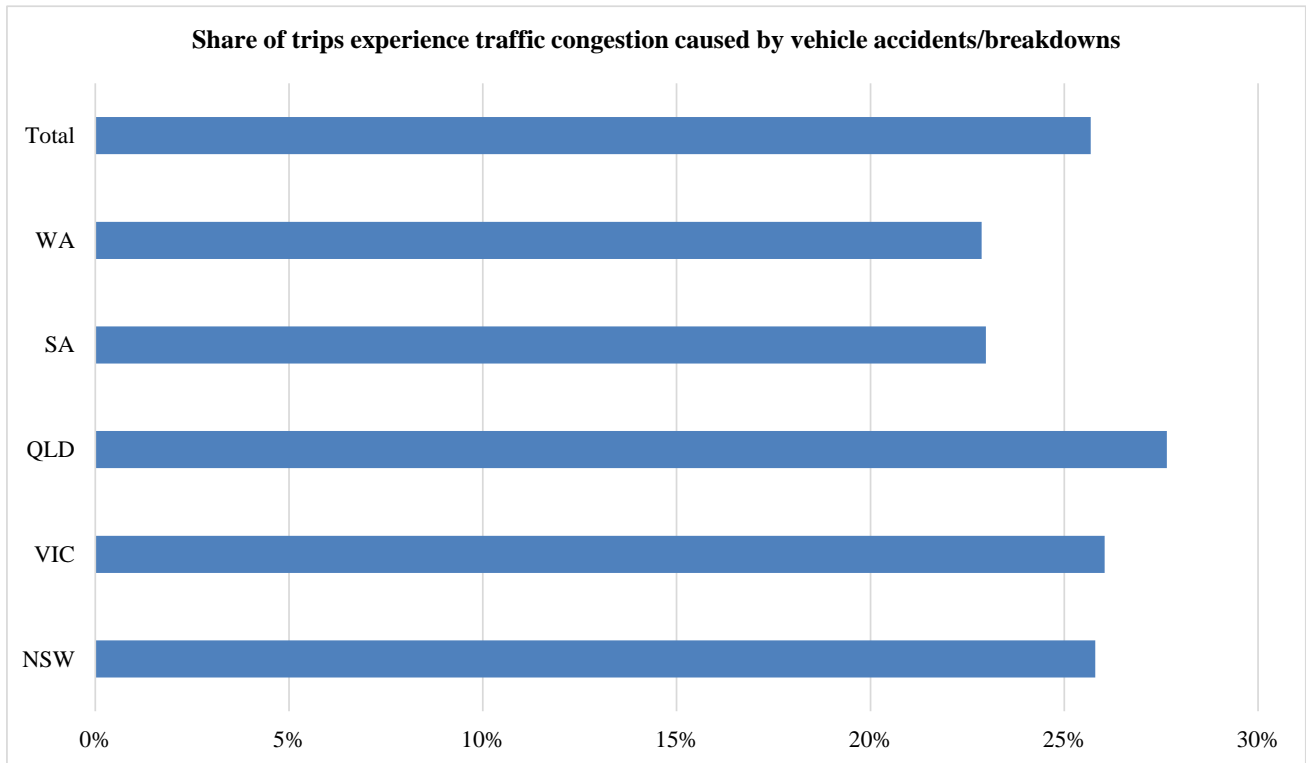
What in your view is a tolerable amount of time to spend commuting each way on a daily basis?

- On average, Australian residents are prepared for about 37 minutes of commuting each way on a daily basis.
- This commuting time is relatively constant for commuters living in different states, with Western Australia residents having the least tolerance of commuting time (34 minutes) and New South Wales residents having the most tolerance of commuting time (40 minutes).



What percent of your trips experience traffic congestion that is caused by vehicle accidents/breakdowns?

- Overall, Australia residents experienced traffic congestion that is caused by vehicle accidents/breakdowns in about 25% of their daily trips.
- Compared to other states, Queensland residents experienced a slightly higher percentage of traffic congestion caused by vehicle accidents/breakdowns (28%) in their daily trips, while Western Australia residents experienced a slightly lower percentage of traffic congestion caused by vehicle accidents/breakdowns (23%) in their daily trips.



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

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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