

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

Quarter 1, March 2014

Highlights

Transport increases as the highest priority national issue

- In the March 2014 quarter, 12% of Australians nominated transport and infrastructure as one of the two highest priority issues in Australia today.

Public transport the highest priority for transport

- 42% of Australians said that the highest priority issue for transport in Australia is public transport improvements, followed by road improvements (21%).

Transport gets worse in local areas

- 29% of Australians said that transport in their local area is worse now than one year ago, up from 24% in the September 2013 quarter (the last survey period).

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

- Only 15% 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

- 17% of Australians think that transport in Australia will be better in one year's time, down from 25% in the September 2013 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 30% now thinking that transport in Australia will be better in five years, down from 47% in the September 2013 quarter.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in March 2014 Australians are less confident about transport in their local areas (Confidence index: from 100 to 78), and across Australia in one year (Confidence index: from 100 to 73), and five years (Confidence index: from 100 to 79).

Australians support a new scheme for car registration and car use

- 60% of Australians support a new rego scheme which would charge less for vehicle registration *but* introduce a per km distance based road use charge, provided in total they would pay no more per annum to register and use their cars.
- If additional funding was raised by this scheme, residents across Australia prefer half of the additional revenue raised to be used to fund improved roads and about a quarter of the additional revenue to be used for improving rail services.

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 online survey from the March 2014 quarter, using the panel of SSI.

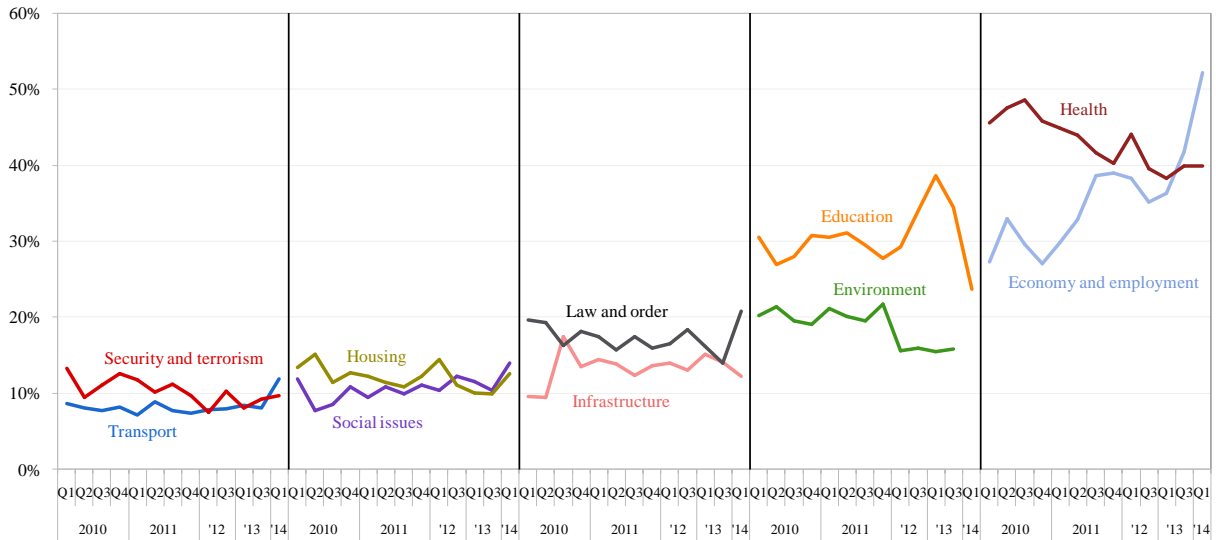
The Quarter 1, March 2014 survey was conducted over 13 – 18 February 2014. Current issues in this quarter included asking Australian residents whether they would support a new scheme of car registration and use, and their preferences for how any additional revenue raised should be allocated to improve transport services and non-transport initiatives.

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 2014, economy and employment continued to be selected as the highest priority issue in Australia, nominated by 52% of Australians, followed by health (40%) and education (24%).
- 12% of Australians nominated transport and infrastructure as one of the two highest priority issues in Australia today.

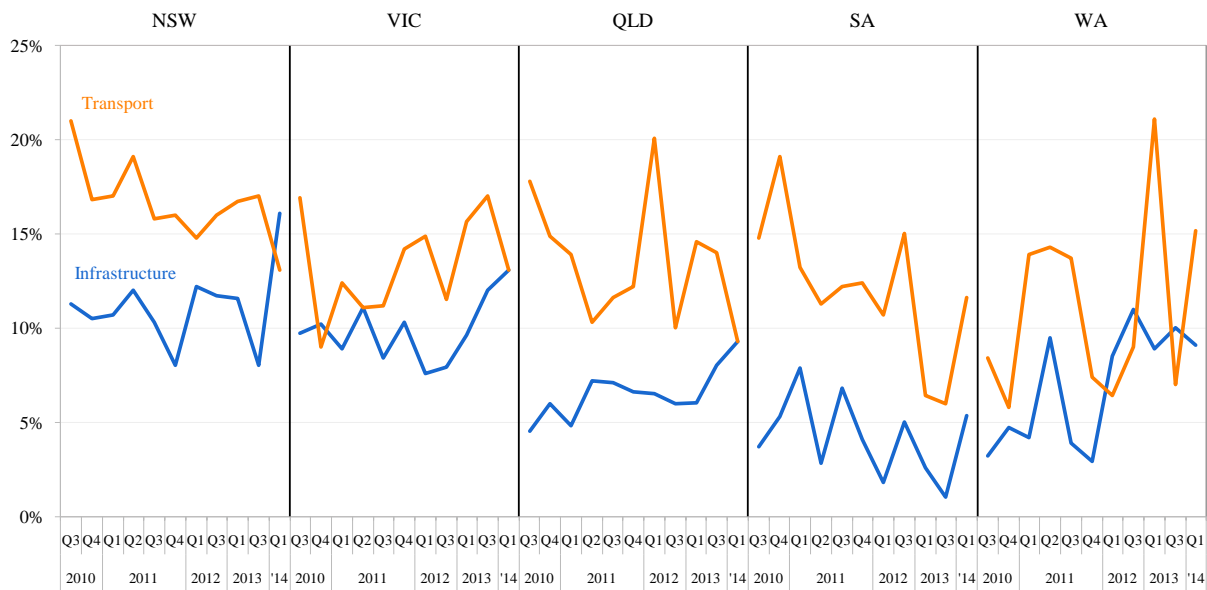
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2014 Q1



Note: percentages add up to 200% in each quarter as each respondent was asked to nominate two highest priority issues.

- In Quarter 1 of 2014, transport was most important in Western Australia (at 15%) amongst all states.

Transport and infrastructure as highest priority issues by state, 2010 Q3 - 2014 Q1

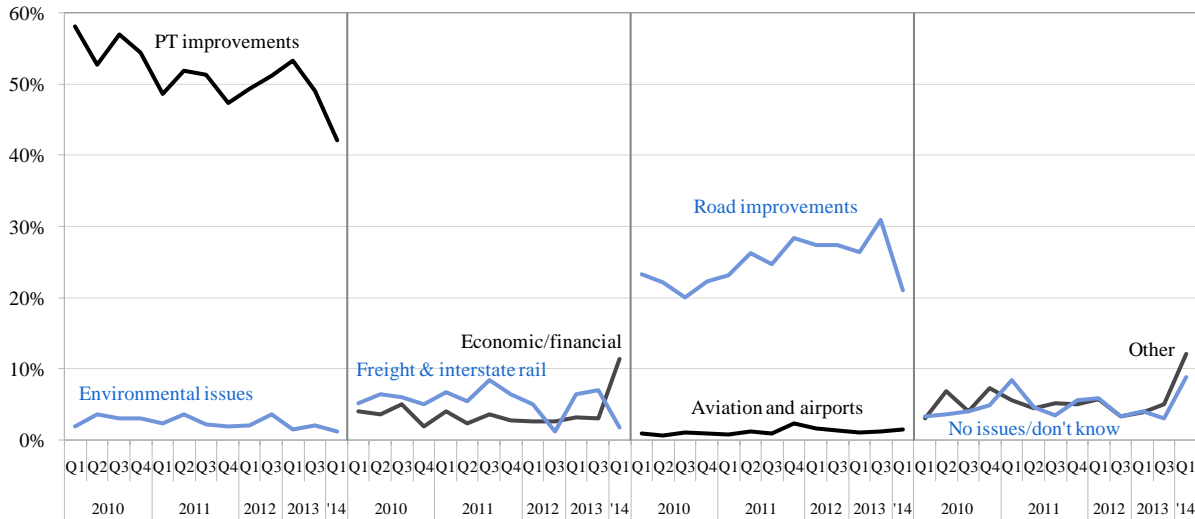


1. Highest priority issue for transport

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

- In the March 2014 quarter, 42% 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. One in five Australians nominated road improvements as the highest priority issue for transport in Australia.

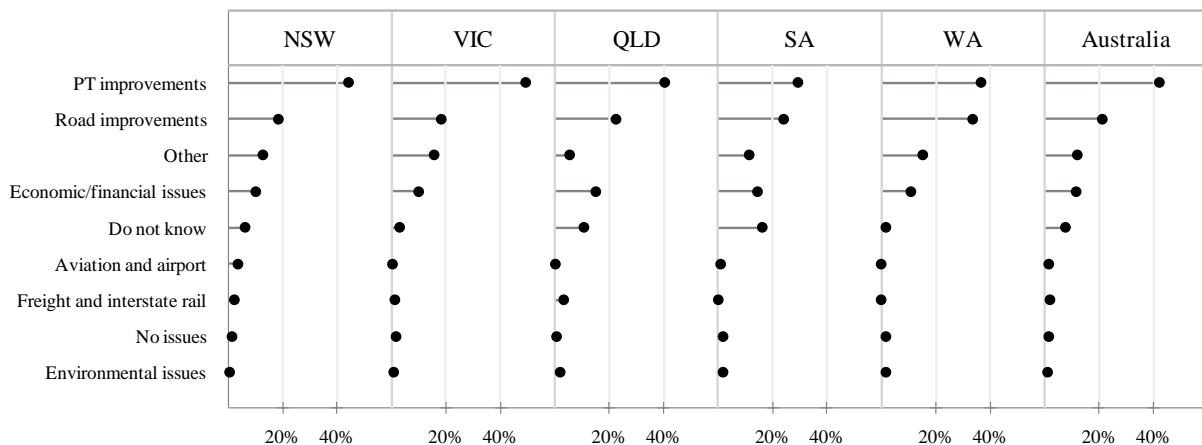
Highest priority transport issue in Australia, 2010 Q1 - 2014 Q1



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, and rebuilding transport after disasters.

- In the March 2014 quarter, all states in Australia regard public transport improvements as the highest priority issue in transport, followed by road improvements.

Highest priority transport issue by state, 2014 Q1



© Transport Opinion Survey

2. Confidence about transport improving in local area

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?

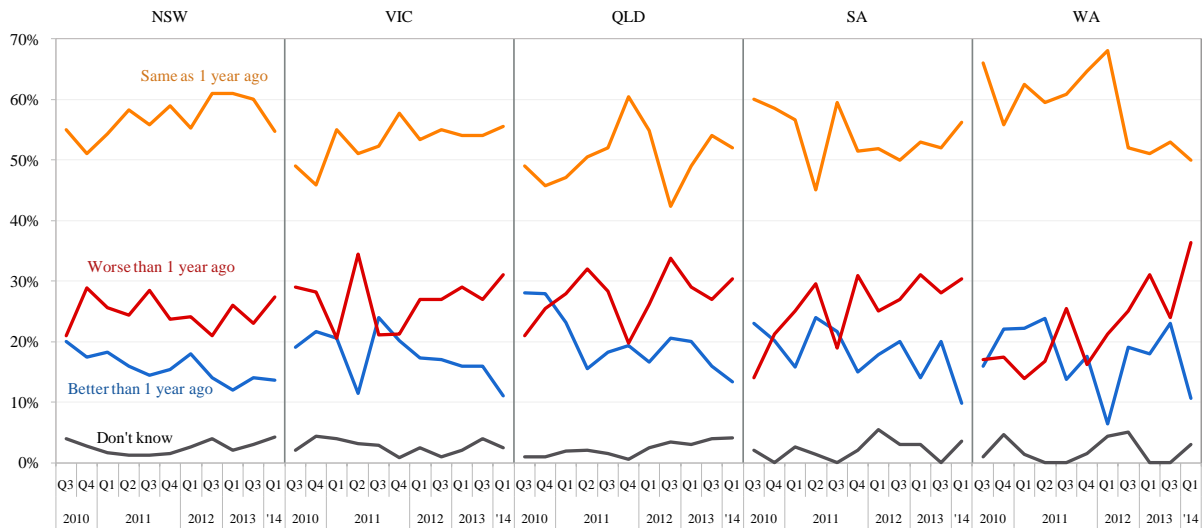
- In the first quarter of 2014, 30% of Australians said that transport in their local areas is worse now than one year ago.

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



- In the March 2014 quarter, 14% of NSW residents said that transport in their local areas is better now than one year ago, slightly higher than other states (9% – 13%). The percentage of residents responding that transport in their local area is worse now than one year ago is higher across all states.

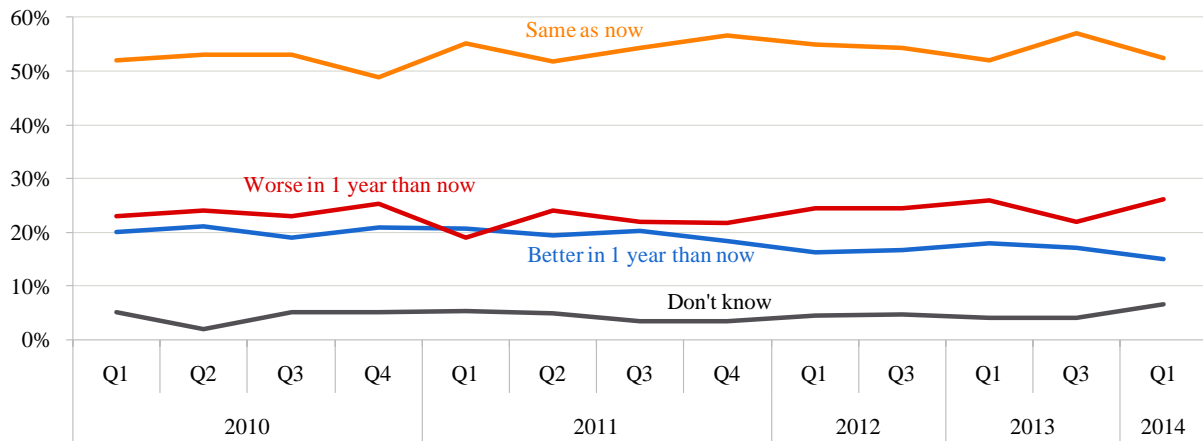
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2014 Q1



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?

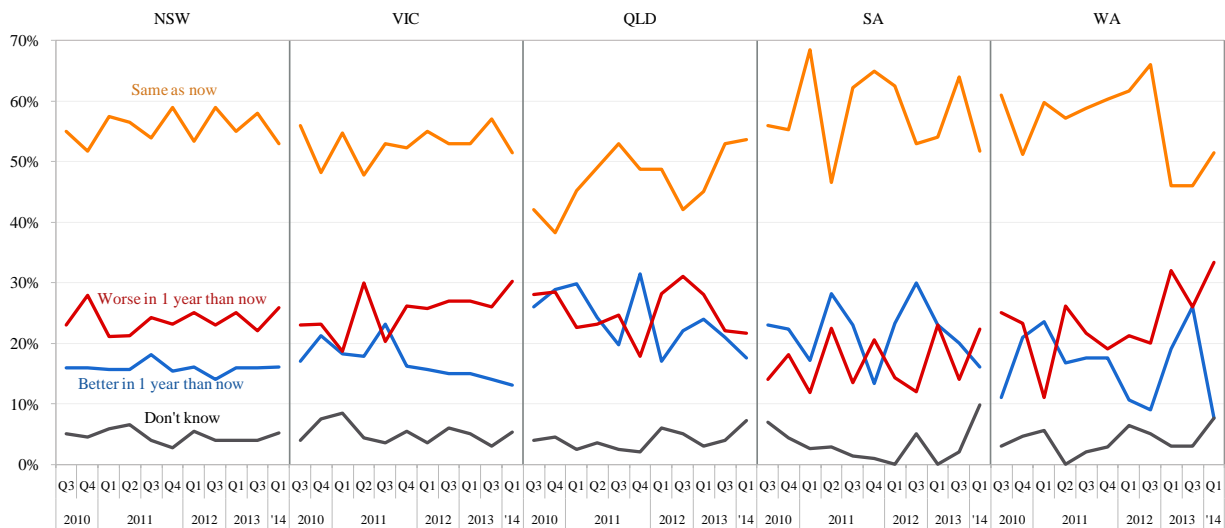
- In the March 2014 quarter, 52% of Australians said that transport in their local areas will be the same in one year's time. Only 15% said transport will be better, slightly down from 17% in the third quarter of 2013.

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



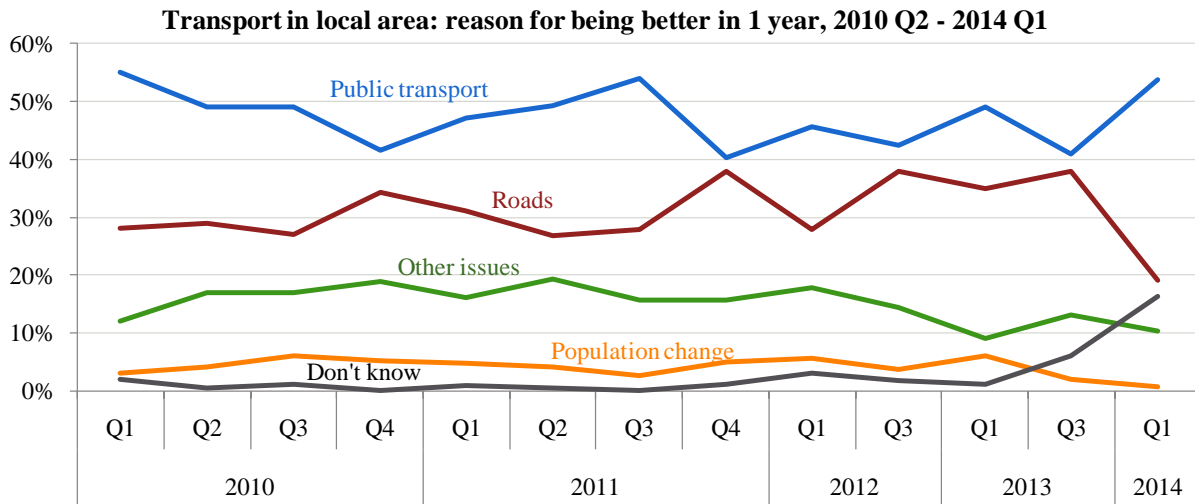
- 18% of Queensland residents believed that transport in their local area will be better in one year; while only 8% of Western Australia residents believed that transport in their local area will be better in one year time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 Q3 - 2014 Q1



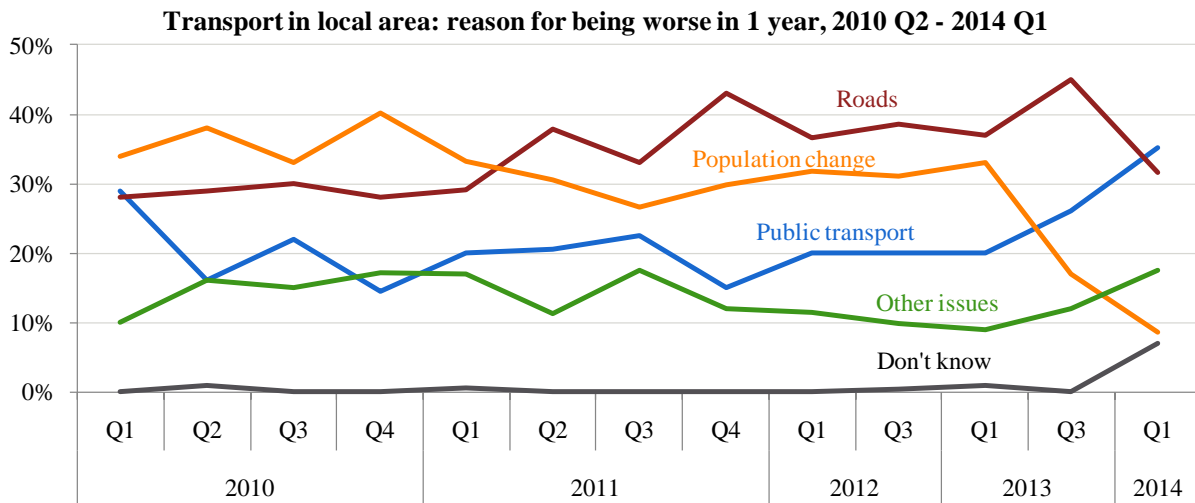
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the March 2014 quarter, those who believed transport in their local areas will be **better** in one year were thinking about both public transport (54%) and roads (19%) as two major reasons.



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.

- In the March 2014 quarter, those who said that transport in their local area will be **worse** in one year were thinking most about public transport (35%), followed by roads (32%).

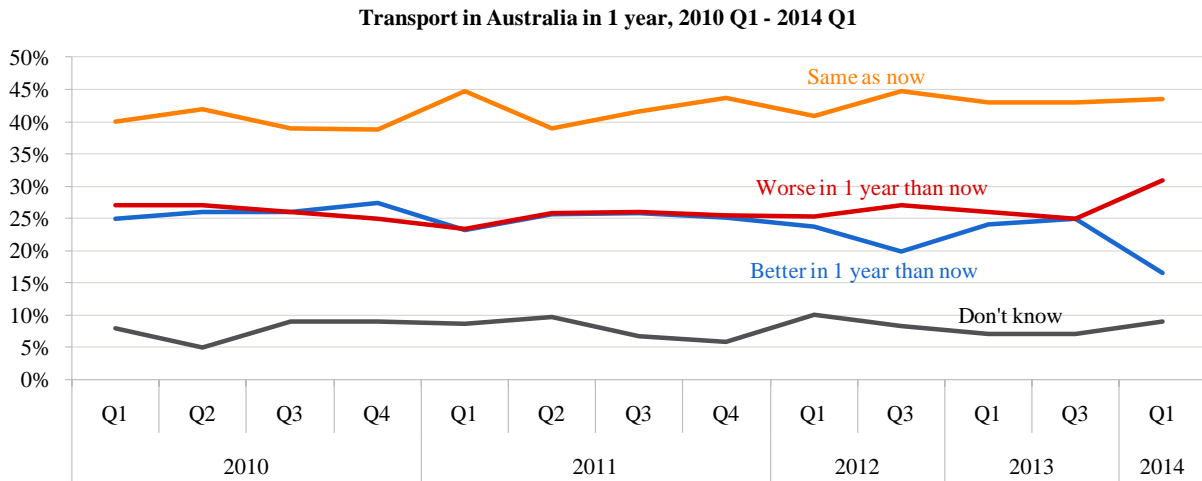


Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

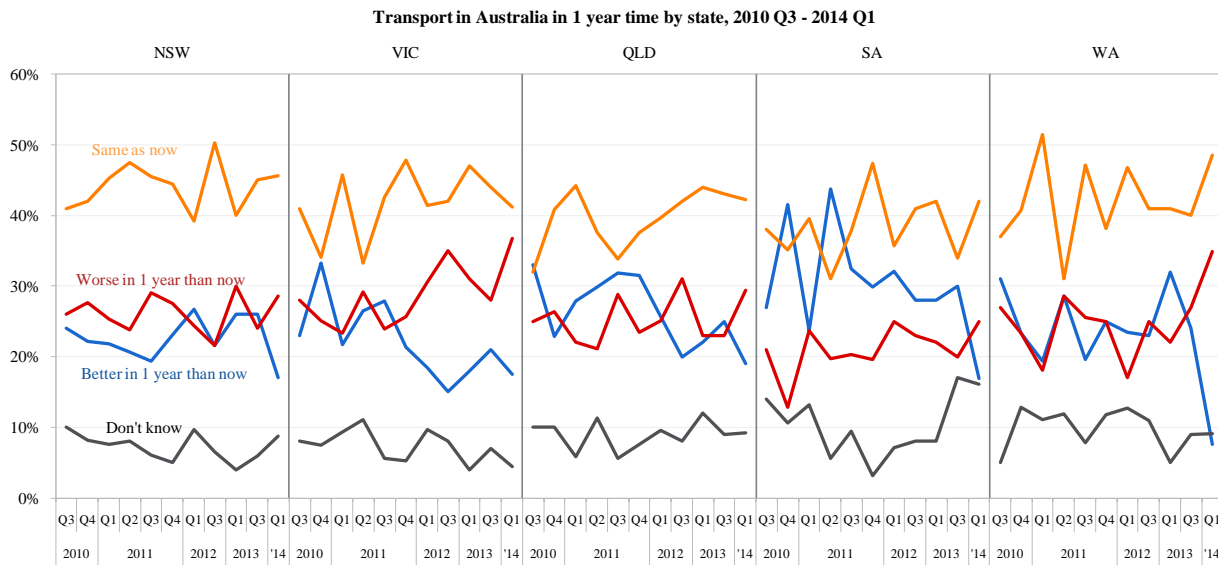
3. Confidence about transport improving in Australia

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 2013 quarter, 44% of Australians said that transport in Australia in one year will be the same as now with only 17% of Australians saying that transport in Australia will be better in one year's time.



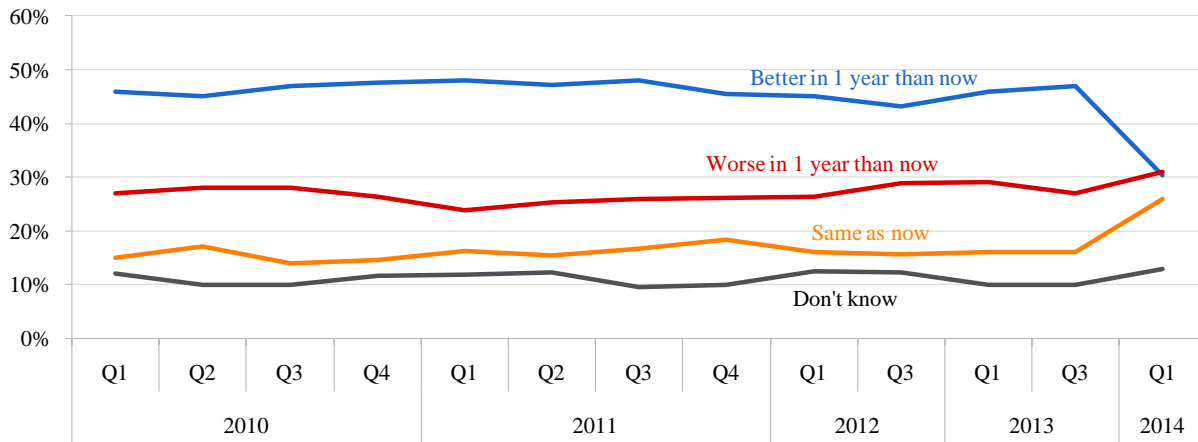
- In the March 2014 quarter, more than one in three Western Australia residents said that transport in Australia will be worse in one year, and less than 10% said that it will be better. Queensland residents are most confident about transport in Australia in one year.



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?

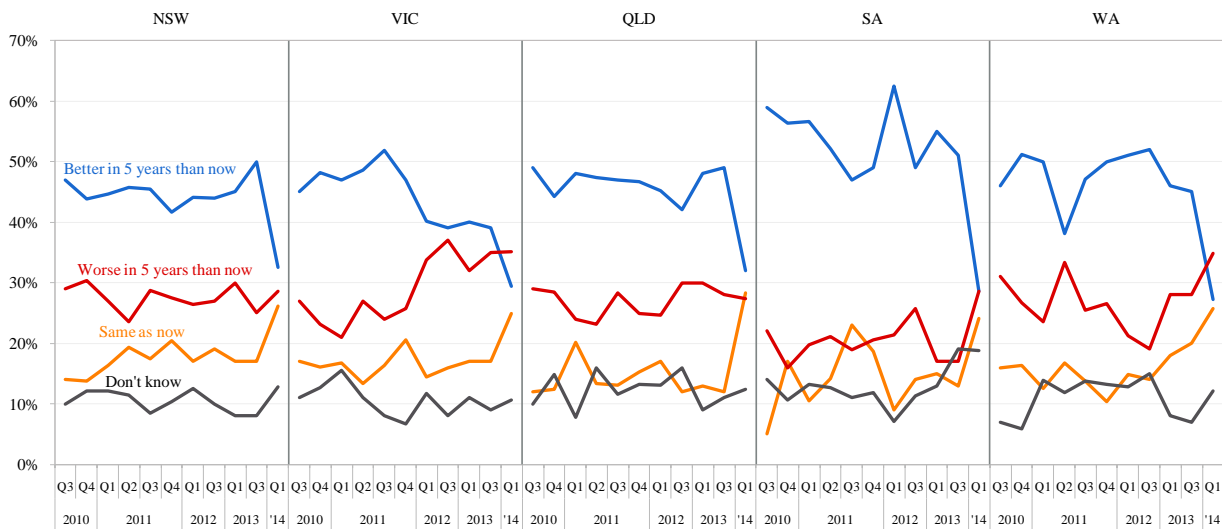
- Australians lost their confidence that transport will be better in five years than it is now. In the March 2014 quarter, only 30% of Australian residents believe transport in Australia will be better in five years, reducing from 47% in the September 2013 quarter. In contrast, the percentage of residents who believes that transport in Australia will stay the same in five years increases to 26% in the first quarter of 2014.

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



- In the March 2014 quarter, one in three Queensland and NSW 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 and Western Australia are least confident, where 35% said that transport in Australia will be worse. In all states this is lower than the September 2013 quarter.

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



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 for quarter 1, March 2010. 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.

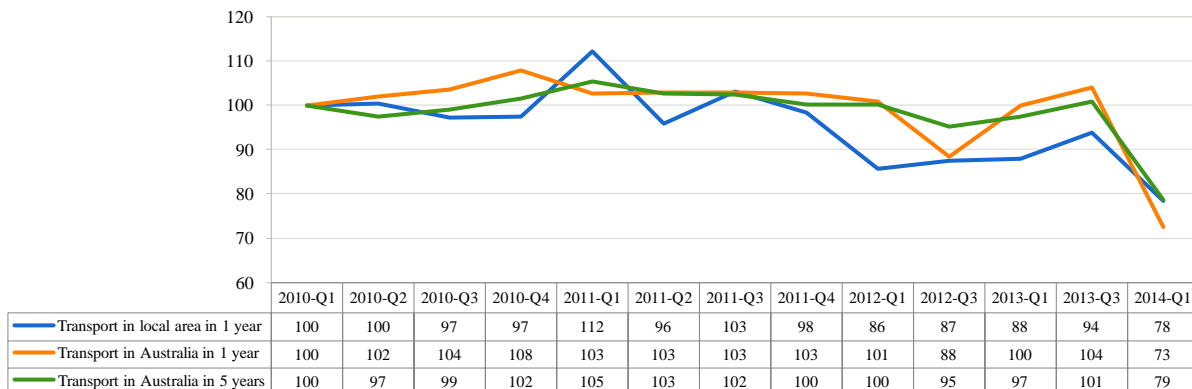
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger than in March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2014 quarter compared to the September 2013 quarter:

- Australians became less confident about transport in their local area in one year's time
- Australians became less confident about transport in Australia in one year's time
- Australians became 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 78), less confident about transport in Australia in one year (Confidence index: from 100 to 73), and less confident about transport in Australia in five years (Confidence index: from 100 to 79).

ITLS TOPS Index of Transport Confidence

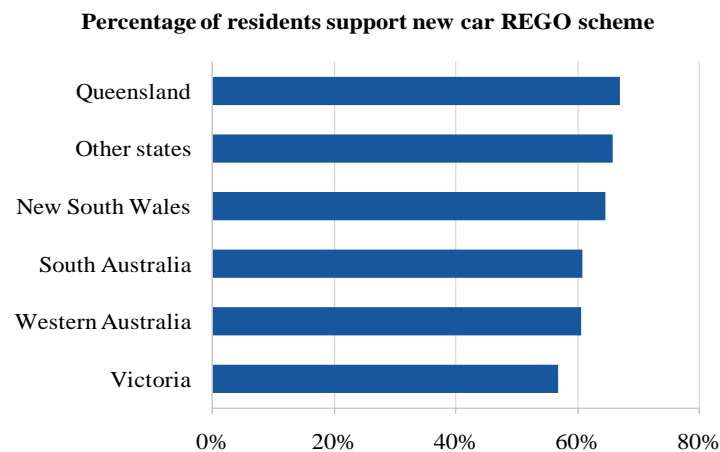


5. Australians support a new scheme for car registration and car use

In the March 2014 quarter, two new questions were asked about Australian residents support for a new scheme of car usage charges and their preferences for how funding raised by increased rego fees should be allocated to improve transport in Australia.

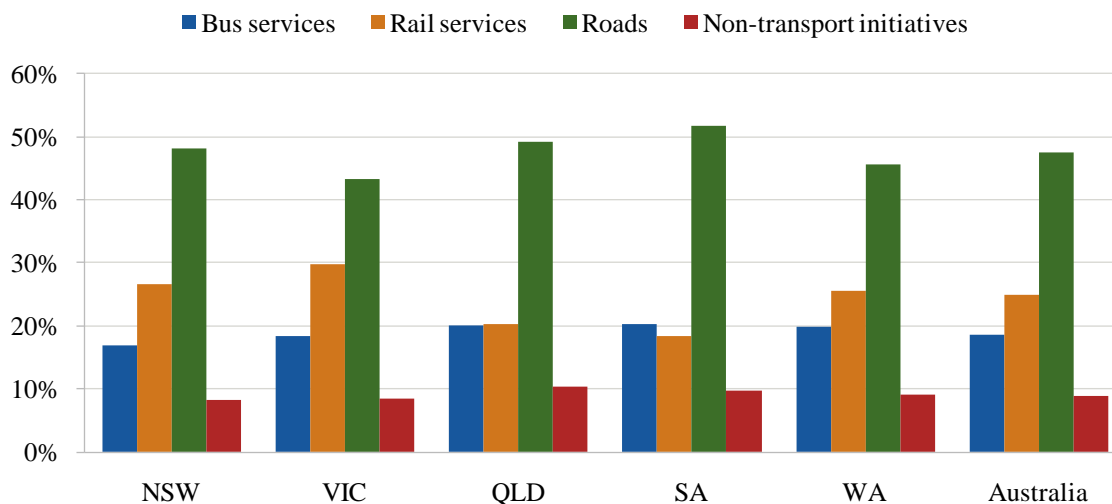
If the government were to reduce your annual vehicle registration charges and introduce a cents per kilometre distance based road use charge so that you paid no more per annum to register and use your car, would you support this initiative?

- Overall, about 60% of Australians supported a new rego scheme which would charge less for vehicle registration *but* introduce a per km distance based road use charge, provided in total they would pay no more per annum to register and use their cars..
- A rego scheme such as proposed finds support in all states across Australia with the difference across states being relatively small.



If the government were to increase your annual car registration charges, what percentage of the additional revenue raised should go to improve bus services, rail services, road and non-transport initiatives (total to add up to 100%).

- Overall, residents across Australia preferred about half of the additional revenue raised to be funded to improve roads, and about a quarter of the additional revenue to be used for improving rail services.
- Victoria residents preferred 30% of the additional revenue raised to fund rail services, which is the highest amongst all states.



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

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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