

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

Quarter 1, March 2015

Highlights

Infrastructure increases while transport decreases as the highest priority national issue

- In the March 2015 quarter, 16% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, up from 12% in the March 2014. In the March 2015 quarter, 7% of Australians nominated transport as one of the two highest priority issues in Australia today, down from 12% in the March 2014.

Public transport the highest priority for transport

- In the March 2015 quarter, 36% of Australians said that the highest priority issue for transport in Australia is public transport improvements, down from 42% in the March 2014. This is followed by road improvements (20%), also slightly down from 21% in the March 2014.

Transport not changed in local areas

- In the March 2015 quarter, 59% of Australians said that transport in their local areas is the same now as one year ago, slightly up from 55% in the March 2014 quarter.

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

- In the March 2015 quarter, only 9% of Australians said that transport in their local areas will be better in one year's time, down from 15% in the March 2014 quarter.

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

- In the March 2015 quarter, 11% 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

- In the March 2015 quarter, 24% of Australians think 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 March 2015 Australians are less confident about transport in their local areas (Confidence index: down from 100 to 54), and across Australia in one year (Confidence index: down from 100 to 56), and five years (Confidence index: down from 100 to 65).

One thirds of Australians are “interested but concerned” about cycling to work or school

- 33% of Australians are interested, but have concerns, about riding a bike to go to/from work or school.
- Aggressive driving behaviour and heavy traffic are the top two barriers to using a bicycle as a mode for the commute.

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. Starting from this quarter, TOPS is launched a longitudinal panel survey, which will repeat in March each year.

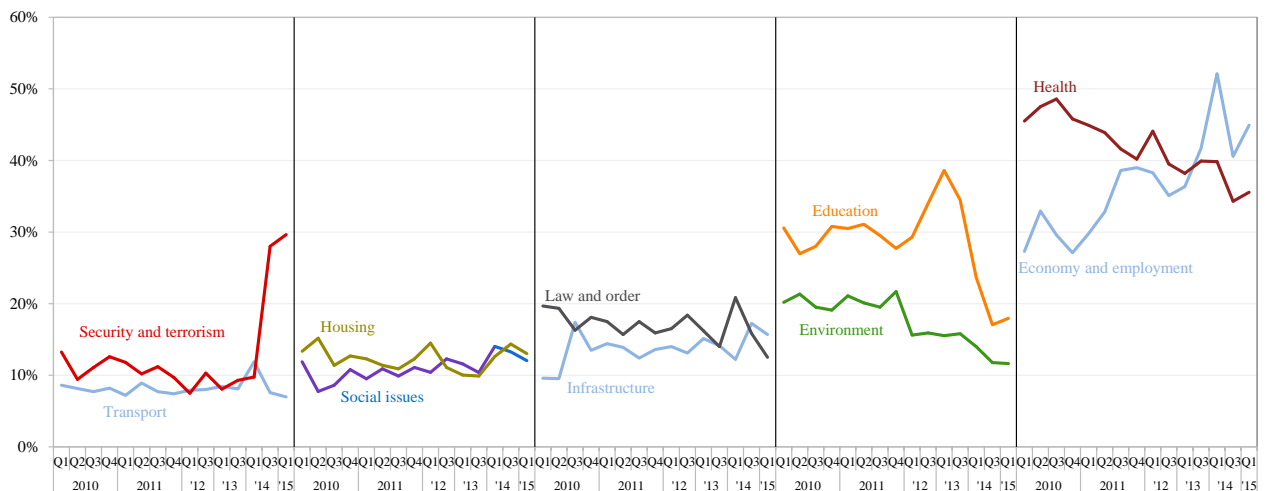
The Quarter 1, September 2015 survey was conducted between 4 and 9 March 2015. As the starting point of the longitudinal survey, 1,500 respondents were targeted. Current issues in this quarter included asking Australian residents' willingness to bicycle to/from work or school, and identifying the barriers preventing the use of the bicycle as a mode for the commute.

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 2015, economy and employment continued to show up as the highest priority issue in Australia, nominated by 45% of Australians, followed by health (36%). 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 (30%).
- 16% of Australians nominated infrastructure and 7% nominated transport as one of the two highest priority issues in Australia today.

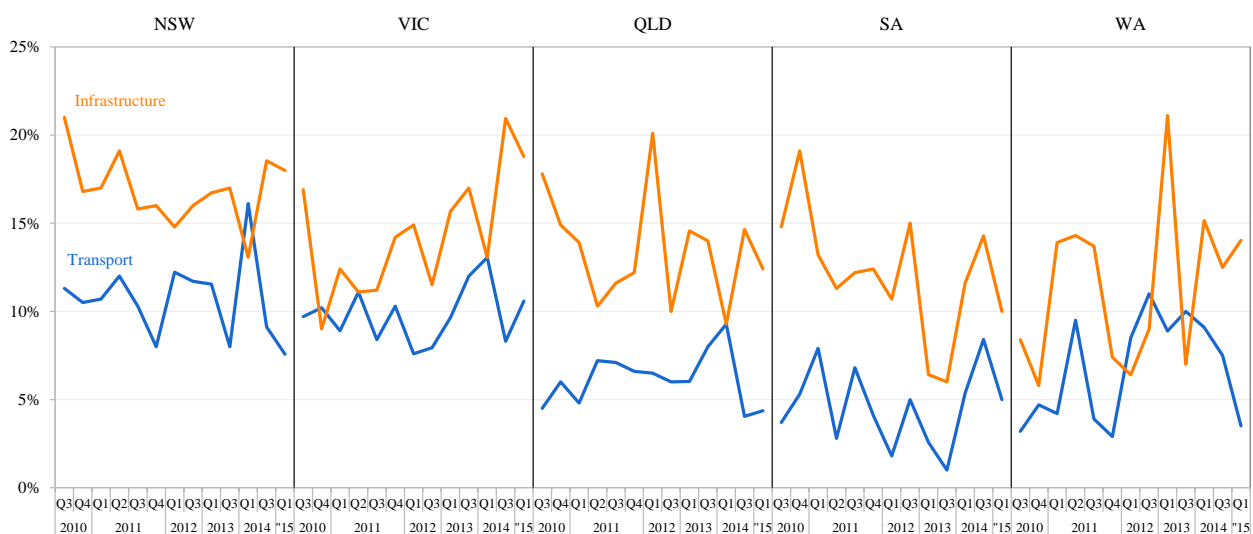
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2015 Q1



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 2015, 9% of Victorian residents nominated transport as a priority as compared to 4% of West Australian residents.

Transport and infrastructure as highest priority issues by state, 2010 Q3 - 2015 Q1



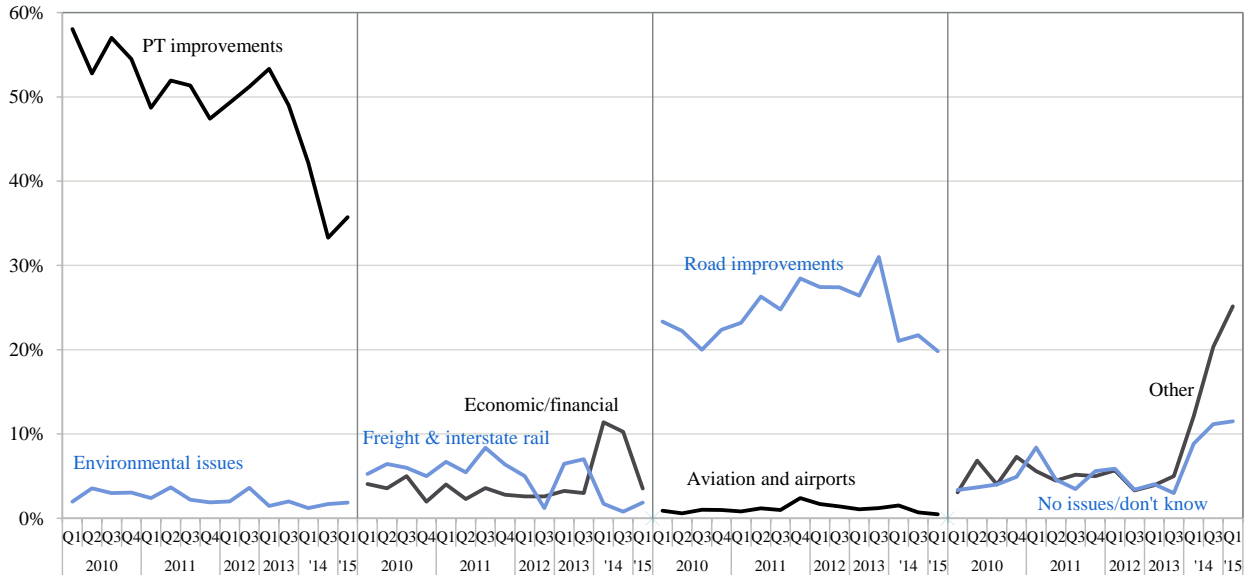
1. Highest priority issue for transport

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

- In the March 2015 quarter, 36% 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.

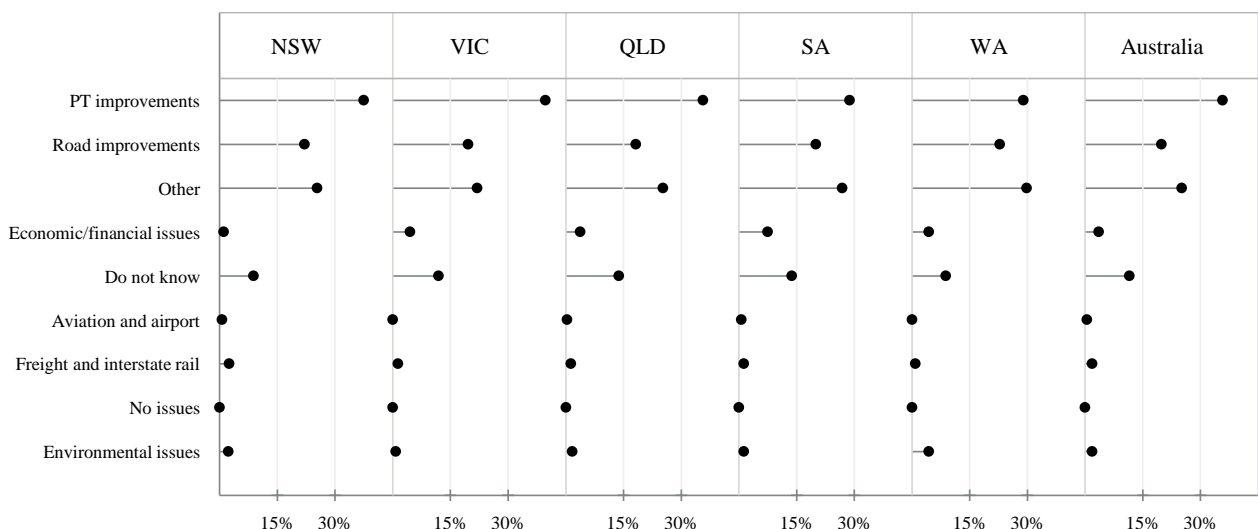
Highest priority transport issue in Australia, 2010 Q1 - 2015 Q1



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 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 Q1



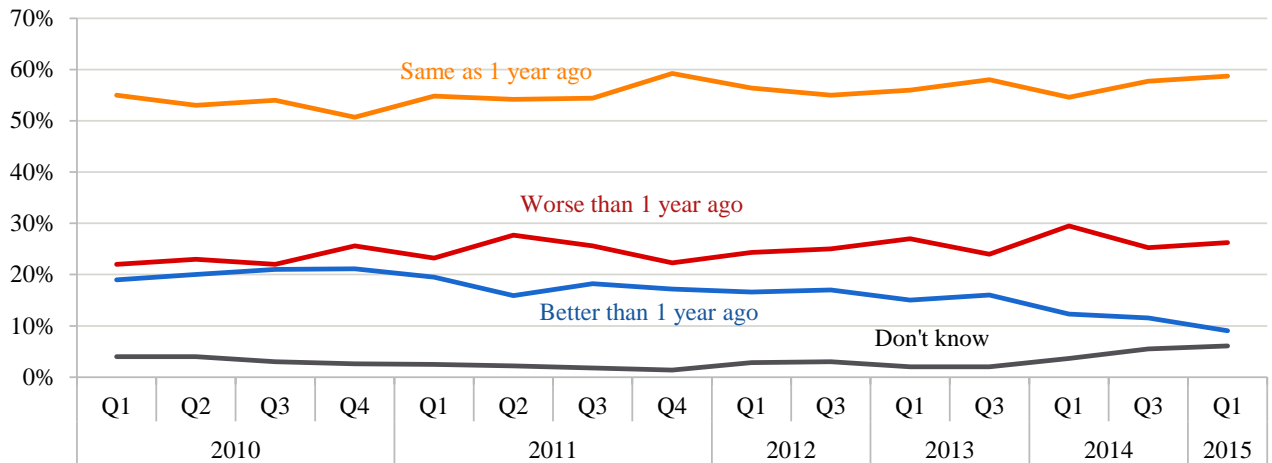
© Transport Opinion Survey

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?

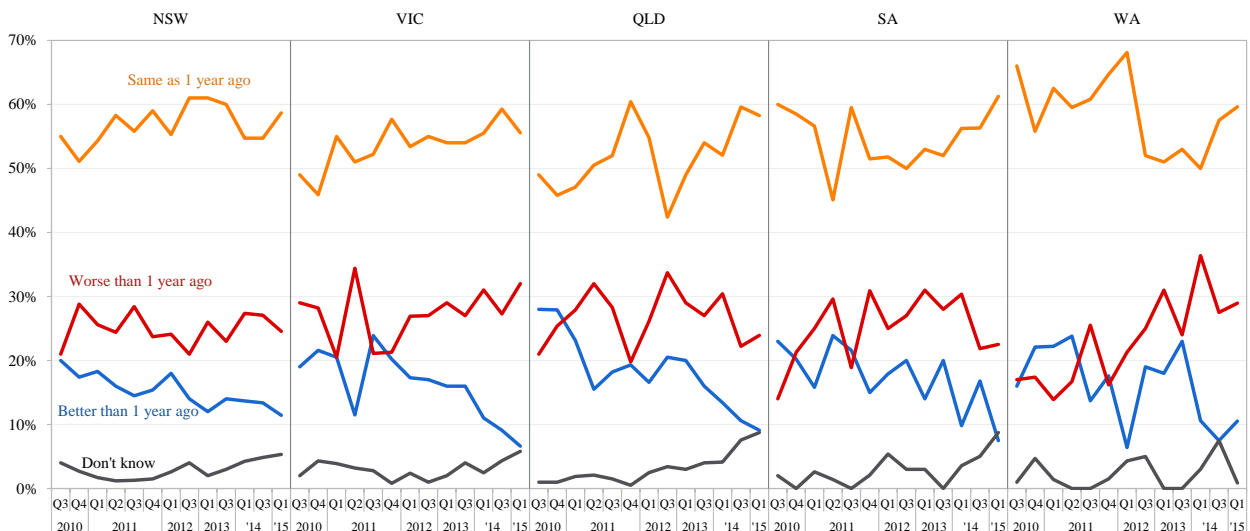
- In the first quarter of 2015, only 9% of Australians believed that transport in their local areas is better now than one year ago, while 59% of Australians said it is the same as one year ago and 26% of Australian said it is worse now than one year ago.

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

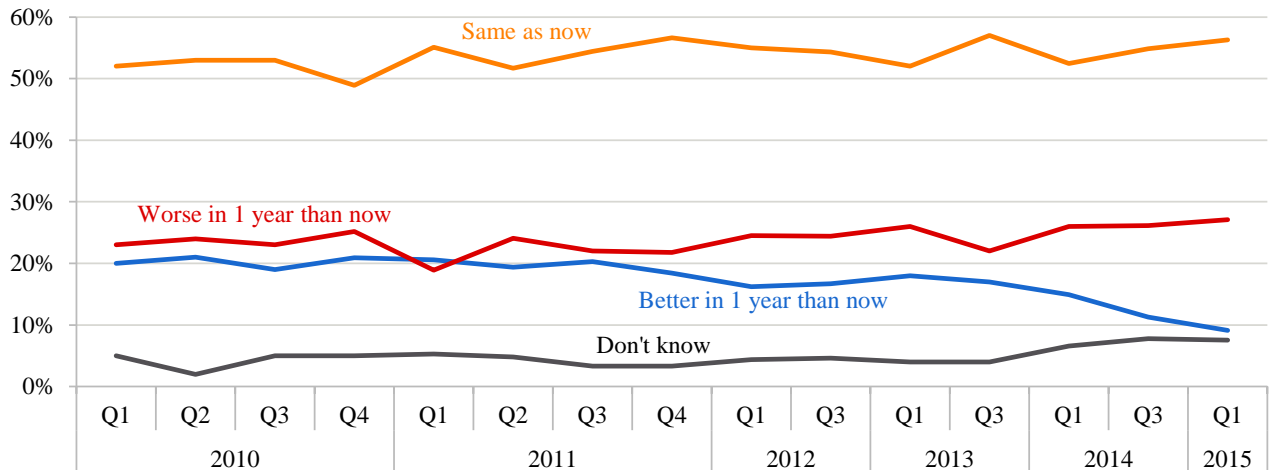
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2015Q1



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?

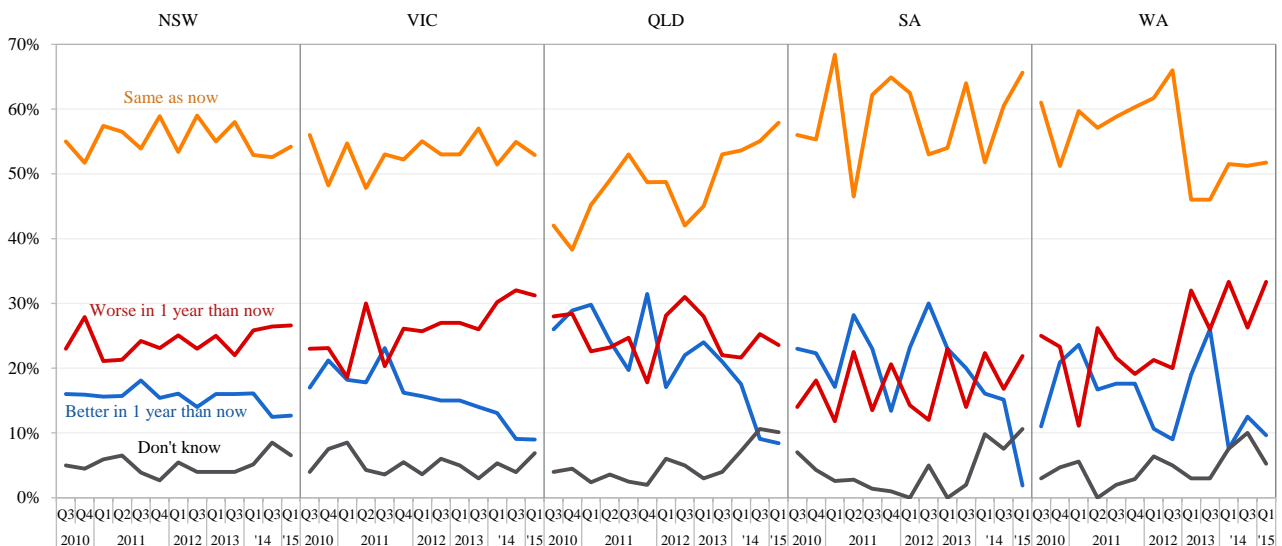
- In the March 2015 quarter, 56% of Australians said that transport in their local areas will be the same in one year's time. Only 9% said transport will be better, slightly down from one year ago at 15% in the first quarter of 2014.

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



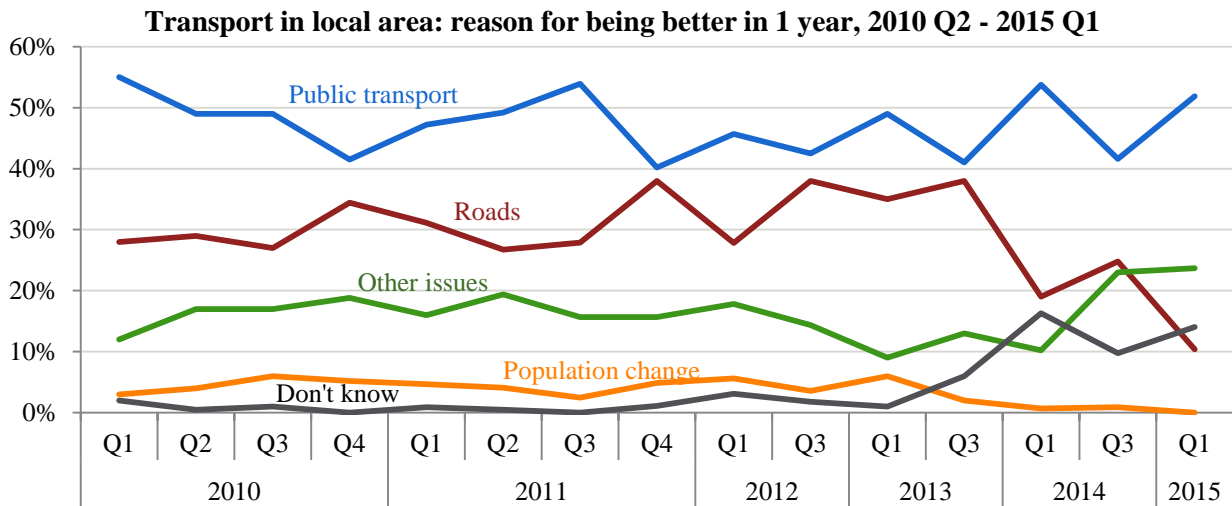
- 13% of New South Wales residents believed that transport in their local area will be better in one year's time; while only 2% of South Australia residents believed the same will happen to their local transport. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 Q3 - 2015 Q1

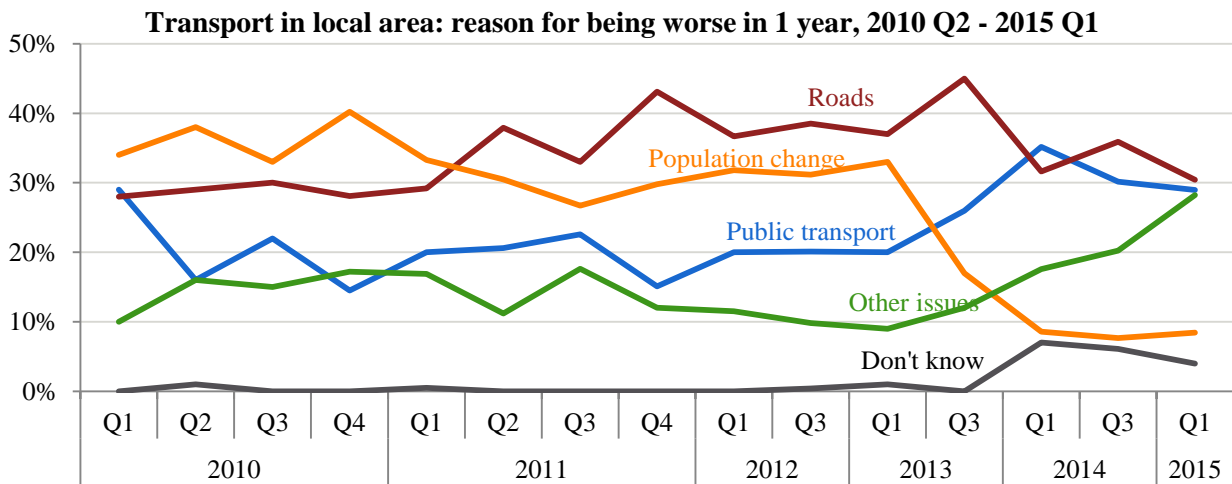


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- Public transport services are the main reasons for residents to believe that their local transport will be better (top figure), 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 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.



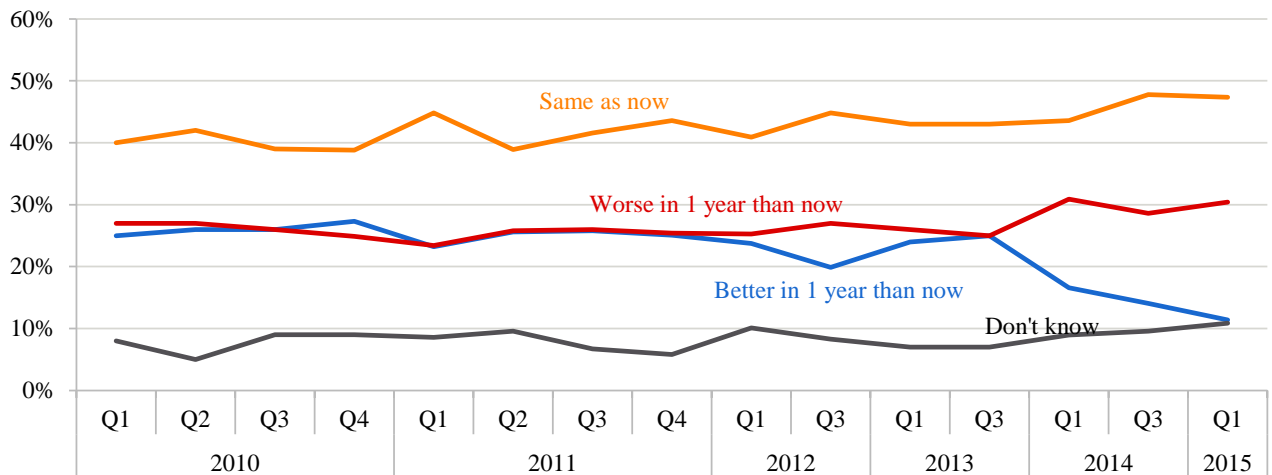
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

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?

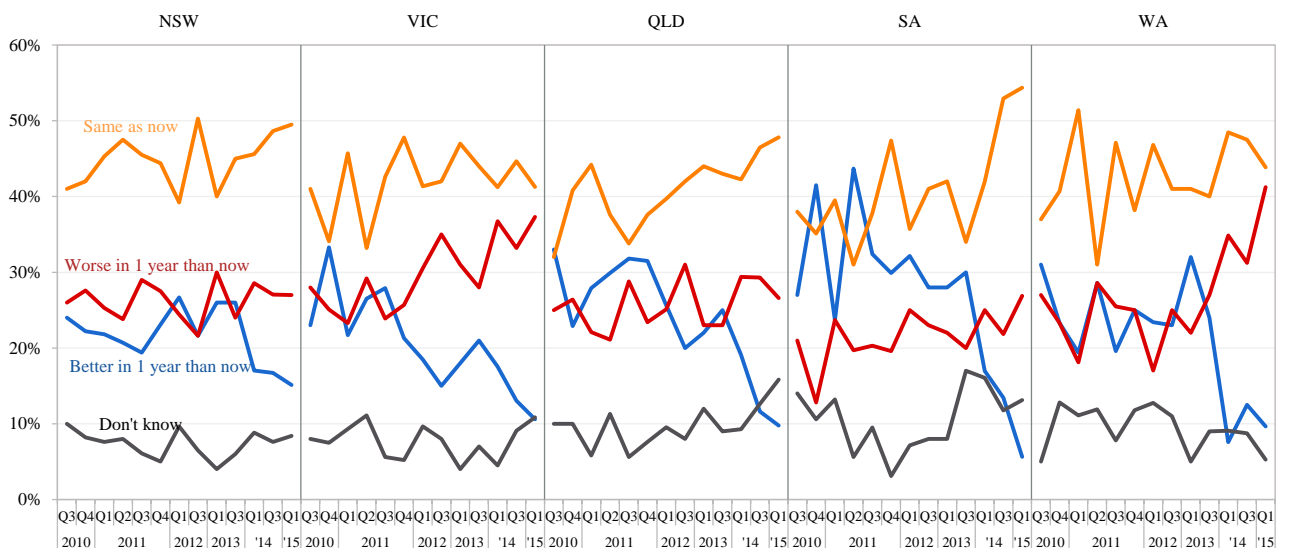
- In the March 2015 quarter, 47% of Australians said that transport in Australia in one year will be the same as now with only 11% of Australians saying that transport in Australia will be better in one year's time, slightly down from 17% in the same quarter last year.

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



- In the March 2015 quarter, more than one third of West Australia and Victoria residents said that transport in Australia will be worse in one year, and only around 10% 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 15% of its residents believing that transport in Australia will be better in one year's time.

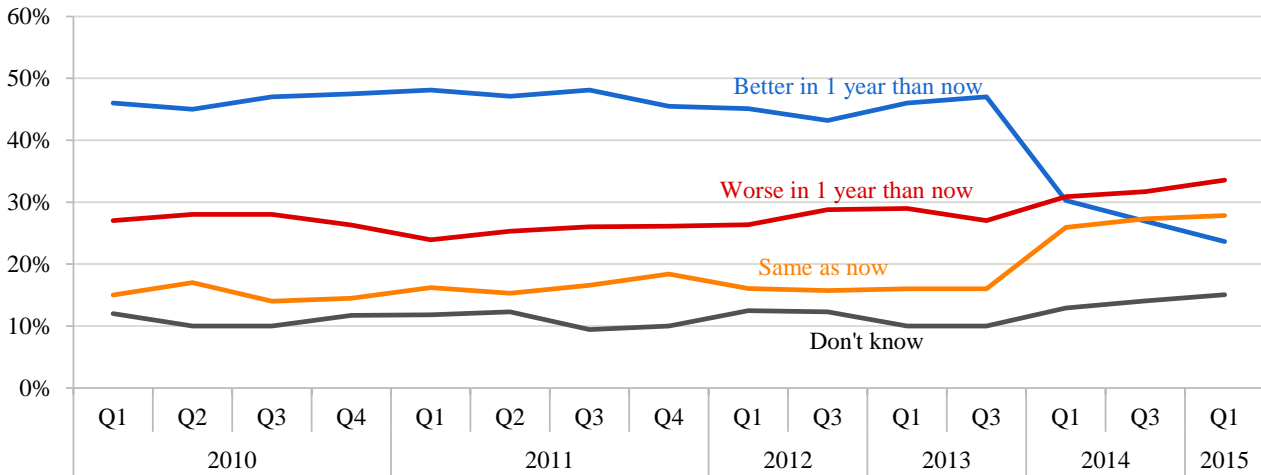
Transport in Australia in 1 year time by state, 2010 Q3 - 2015 Q1



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?

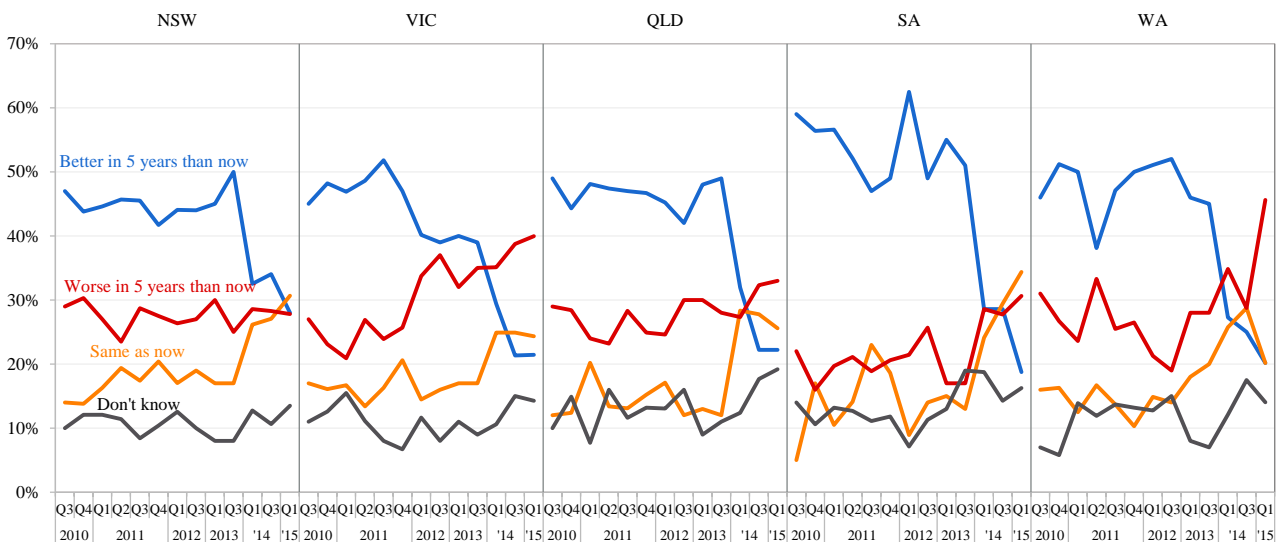
- Australians are losing confidence that transport will be better in five years than it is now. In the March 2015 quarter, only one in five Australian residents believe transport in Australia will be better in five years. This has been continuously declining from 47% in the September 2013 quarter. In 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 Q1



- In the March 2015 quarter, about 28% New South Wales 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 West Australia are least confident, where 46% respondents said that transport in Australia will be worse in five years' time.

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

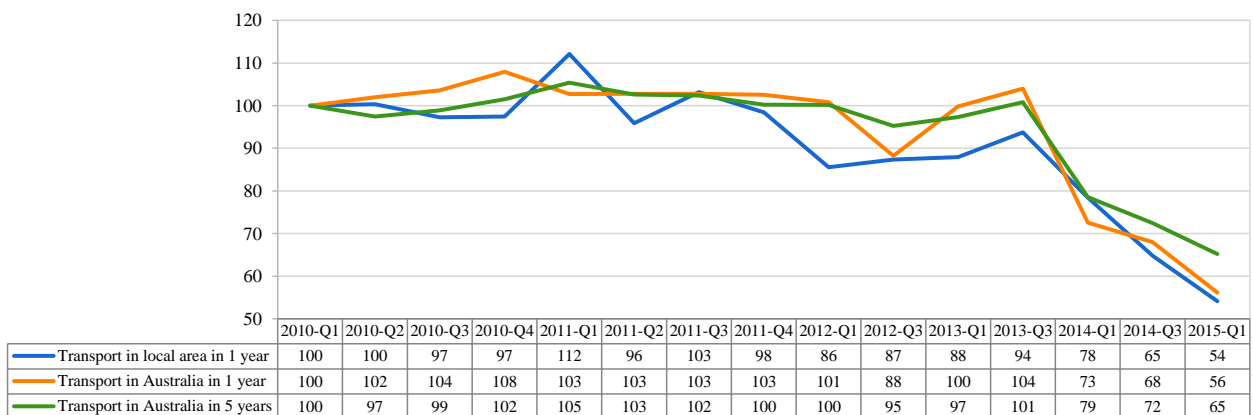
A TOPS Index value of more than 100 means that Australians’ confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 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 March 2015 (Confidence index: from 100 to 54), less confident about transport in Australia in one year (Confidence index: from 100 to 56), and less confident about transport in Australia in five years (Confidence index: from 100 to 65). There has been a very strong decline in confidence since September 2013.

ITLS TOPS Index of Transport Confidence

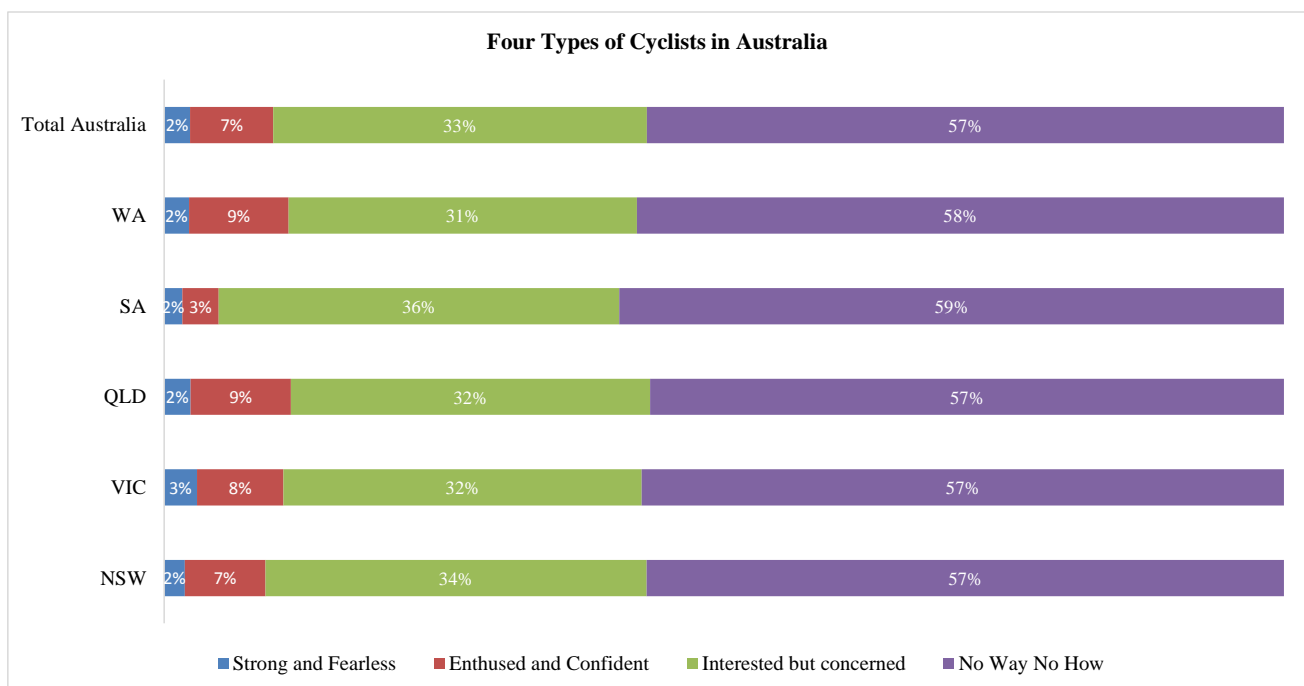


5. One thirds of Australians are “interested but concerned” to cycle to work or school

In the March 2015 quarter, two new questions were asked to identify the latent demand for bicycling as a mode to work or school and to identify the major barriers to bicycling in Australia.

Which of the following best describes how you feel about bicycling to/from work or school?

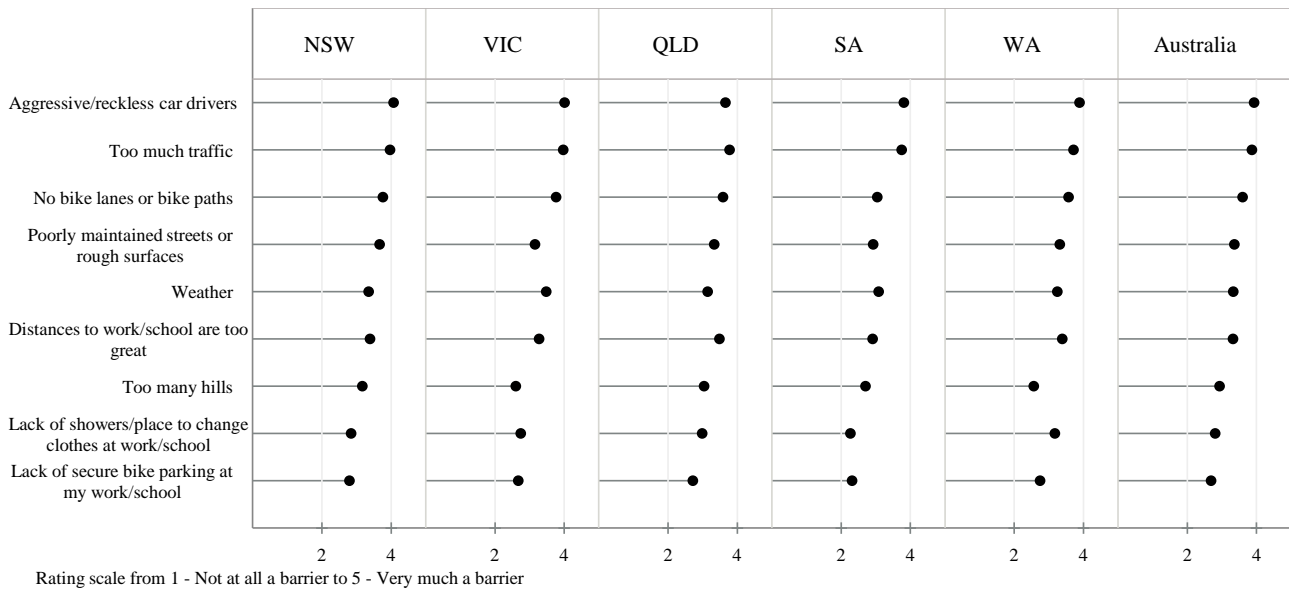
- Overall, about 2% of Australians are strong and fearless while they ride a bike to go to/from work or school, about 7% are enthusiastic and confident while they ride a bike to go to/from work or school, about 33% are interested, but have concerns, so they never or rarely ride a bike to go to/from work or school, and about 57% are not interested in any way and would not ride a bike to go to/from work or school.
- The structure of the four types of cyclists is quite similar across all states, with a slightly higher percentage (36%) of “interested but concerned” population in South Australia.



To what extent is each of these issues a barrier that prevents you from bicycling to/from work or school?

- Aggressive driving behaviour and heavy traffic are the top two barriers to bicycling to/from work or school for those who are interested but concerned. Lack of bicycling infrastructure, such as bike lanes and paths, is another important barrier to bicycling to/from work or school. In addition, poorly maintained streets or rough surfaces and long distances from home to work/school were also nominated as top barriers to bicycling by respondents from all states in Australia.
- Other important barriers to bicycling in Australia include the weather, too many hills, lack of showers/place to change clothes at work/school, and lack of secure bike parking at the workplace/school.

Top Barriers to Cycling in Australia



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

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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