

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

Quarter 3, September 2016

**Highlights**

**Infrastructure slightly increases as the highest priority national issue**

- In the September 2016 quarter, 16% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, up from 14% in September 2015.

**Public transport the highest priority for transport**

- In the September 2016 quarter, 31% of Australians said that the highest priority issue for transport in Australia is public transport improvements, down from 37% in September 2015.

**Transport not changed in local areas**

- In the September 2016 quarter, 56% of Australians said that transport in their local areas is the same now as one year ago, slightly down from 61% in the September 2015 quarter.

**Regaining confidence about local transport in the short-term**

- In the September 2016 quarter, 11% of Australians said that transport in their local areas will be better in one year's time, up from 7% in the September 2015 quarter.

**Regaining confidence about transport in Australia in the short-term**

- In the September 2016 quarter, 14% of Australians think that transport in Australia will be better in one year's time, up from 9% in the September 2015 quarter.

**Australians regain confident about transport in Australia in the longer-term**

- In the September 2015 quarter, 28% of Australians think that transport in Australia will be better in five years, up from 22% 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 62), and across Australia in one year (Confidence index: down from 100 to 65), and five years (Confidence index: down from 100 to 78).

**Over 20% of Australians have used Uber-type services and over 40% of Australians would like to use these services in the future.**

- On average, about 23% of Australian residents have used Uber or Uber-type services, about 42% Australian indicated that they would to use it if the services become available to them, and another 35% said they would not use these services in the future.
- Among those who have used the Uber or Uber-type services, 7% indicate that they will replace some of their car travel and 4% will replace all their car travel with these new mobility services.
- About 20% of Australian residents are prepared to share their car with other people, either by driving for Uber or similar companies (10%) or by peer-to-peer car sharing, such as Car Next Door (4%), or by both (5%).

**About the Transport Opinion Survey**

The Transport Opinion Survey is a biannual survey of 1,000 adults aged 18 years and over across Australia which was 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.

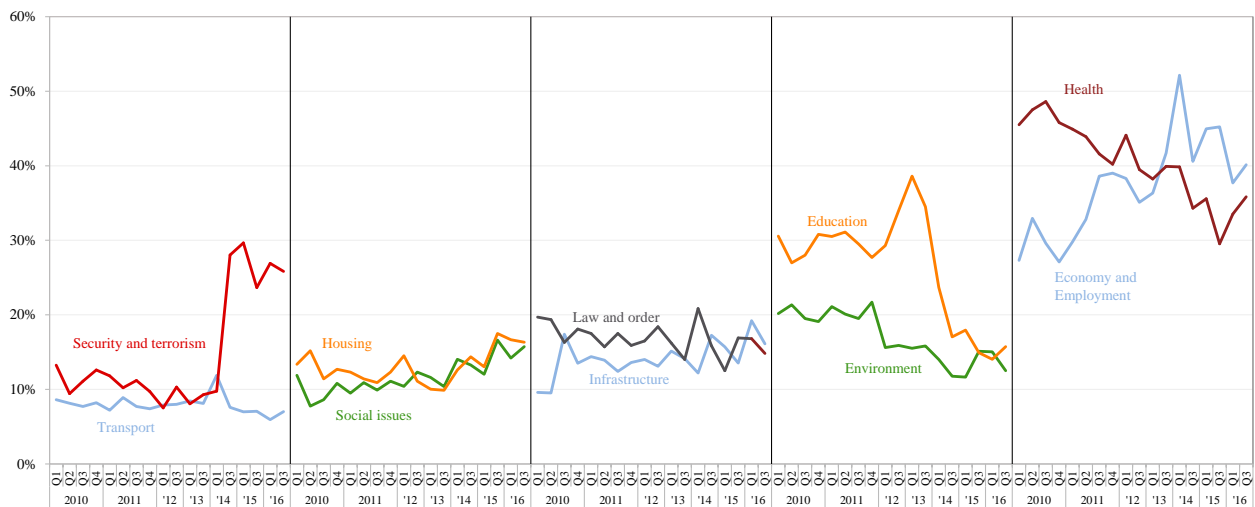
The Quarter 3, September 2016 survey was conducted between 1 and 7 September 2016. Current issues in this quarter included asking Australian residents' opinion about the Uber-type services and peer-to-peer car sharing services, such as Car Next Door.

### 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 2016, economy and employment continued to show up as the highest priority issue in Australia, nominated by 40% 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 (26%).
- 16% of Australians nominated infrastructure and 7% nominated transport as one of the two highest priority issues in Australia today.

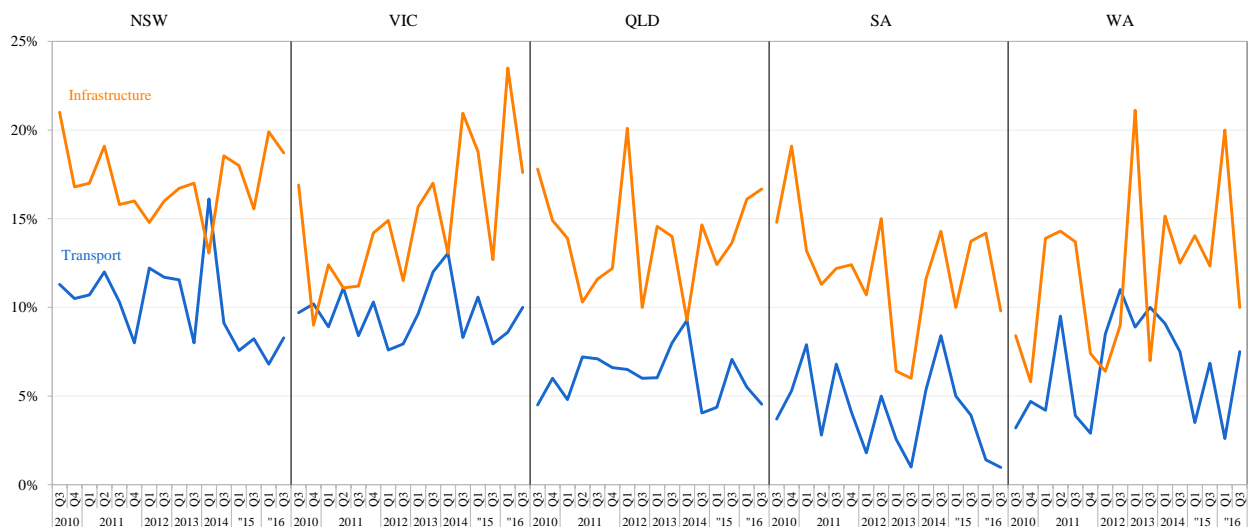
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2016 Q3



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 2016, 10% of Victoria residents nominated transport as a priority as compared to only 1% of South Australia residents.

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

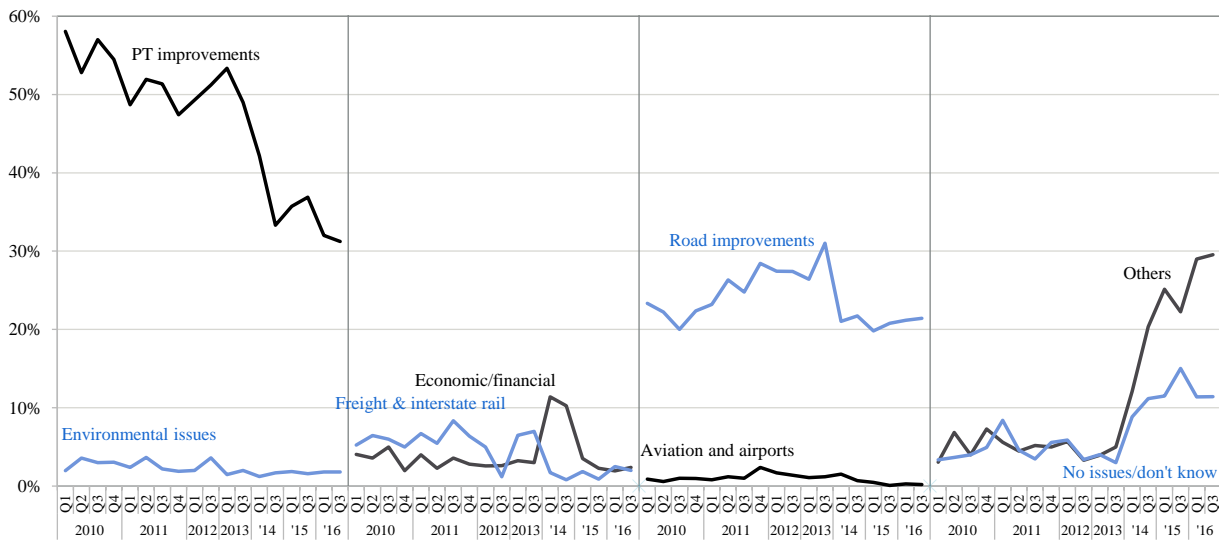


## 1. Highest priority issue for transport

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

- In the September 2016 quarter, 31% 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, although this is noticeably declining. About one in five Australians nominated road improvements as the highest priority issue for transport in Australia.

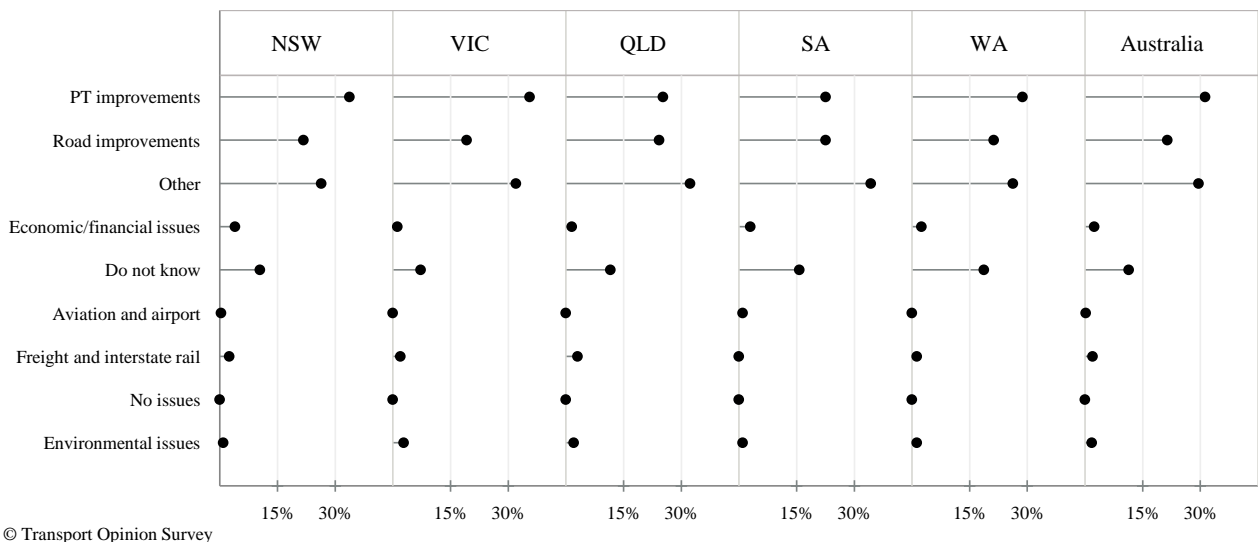
Highest priority transport issue in Australia, 2010 Q1 - 2016 Q3



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 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 Q3



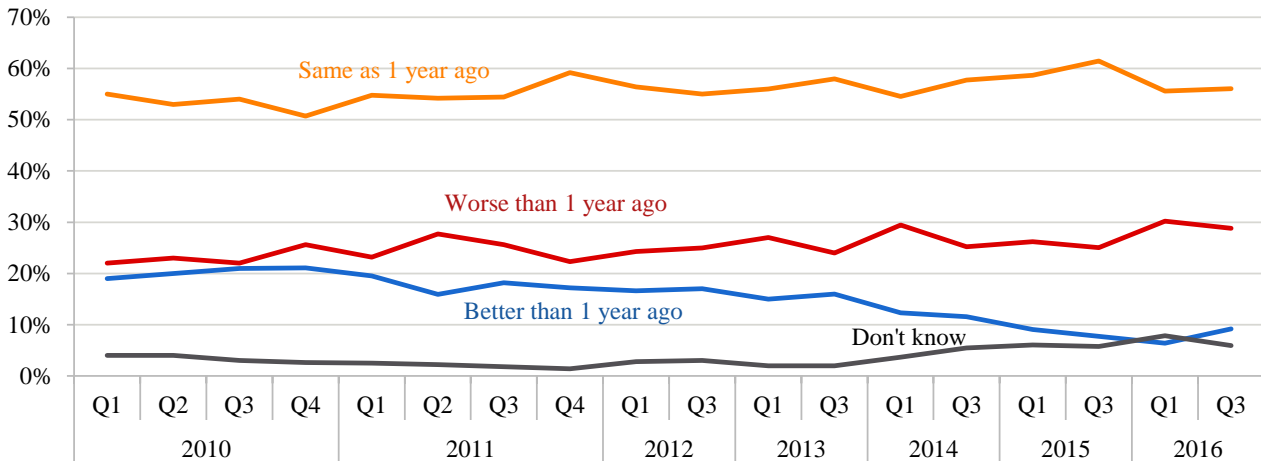
© Transport Opinion Survey

## 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?

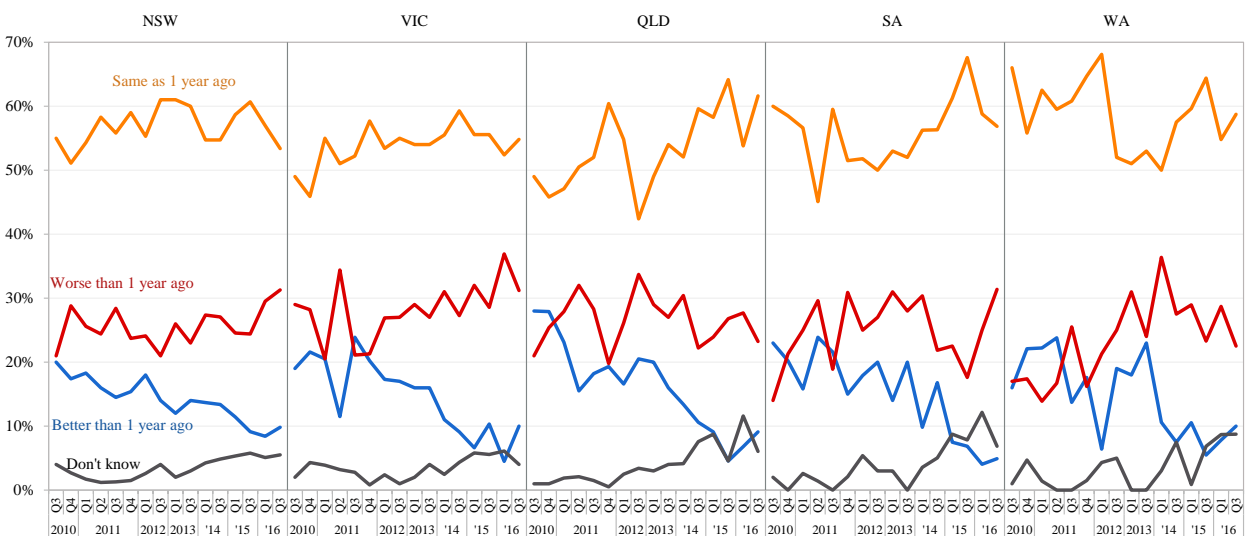
- In the third quarter of 2016, about 9% of Australians believed that transport in their local areas is better now than one year ago, while 56% of Australians said it is the same as one year ago and 29% of Australian said it is worse now than one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 Q1 - 2016 Q3



- The evaluation of transport in the local area by respondents is relatively consistent across all states of Australia, with most respondents identifying it as the same as one year ago. Compared with one year ago, there is a slight increase in the percentage of residents responding that transport in their local area is better now than one year ago with the exception of South Australia.

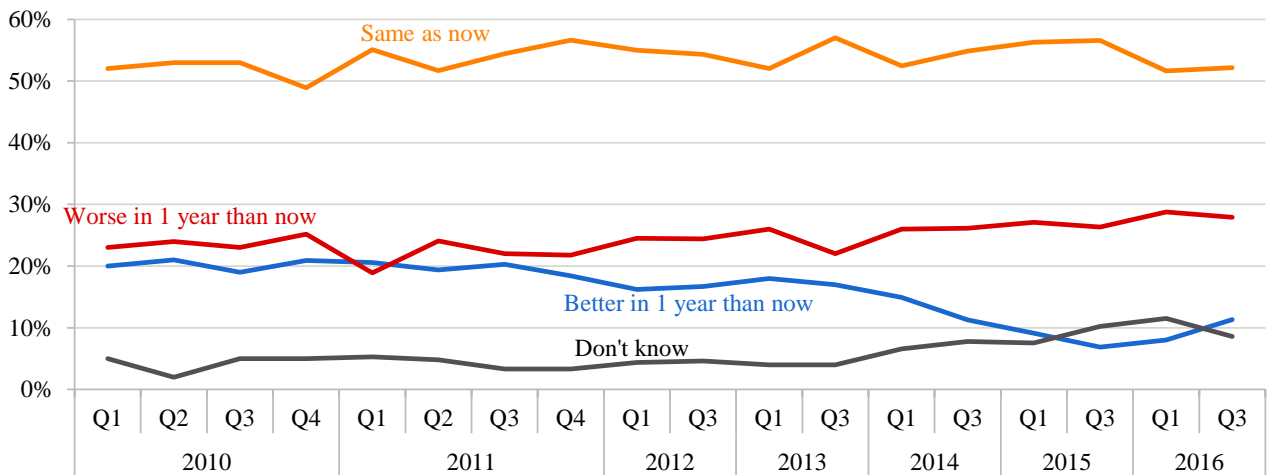
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2016Q3



*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?*

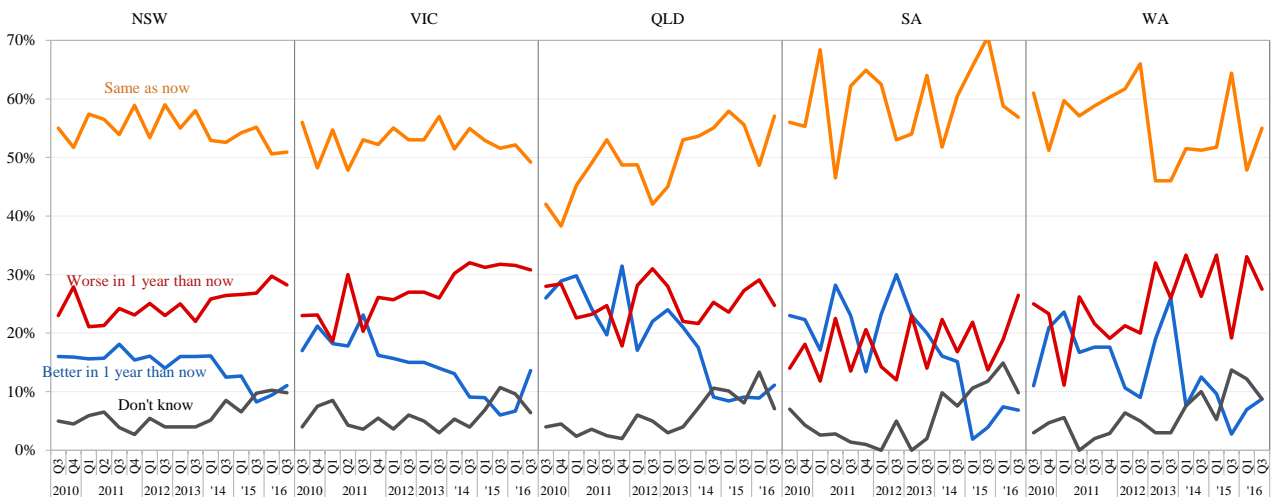
- In the September 2016 quarter, 52% of Australians said that transport in their local area will be the same in one year's time. About 11% said transport will be better, slightly up from one year ago at 7% in the third quarter of 2015.

**Transport in local area in 1 year time across Australia, 2010 Q1 - 2016 Q3**



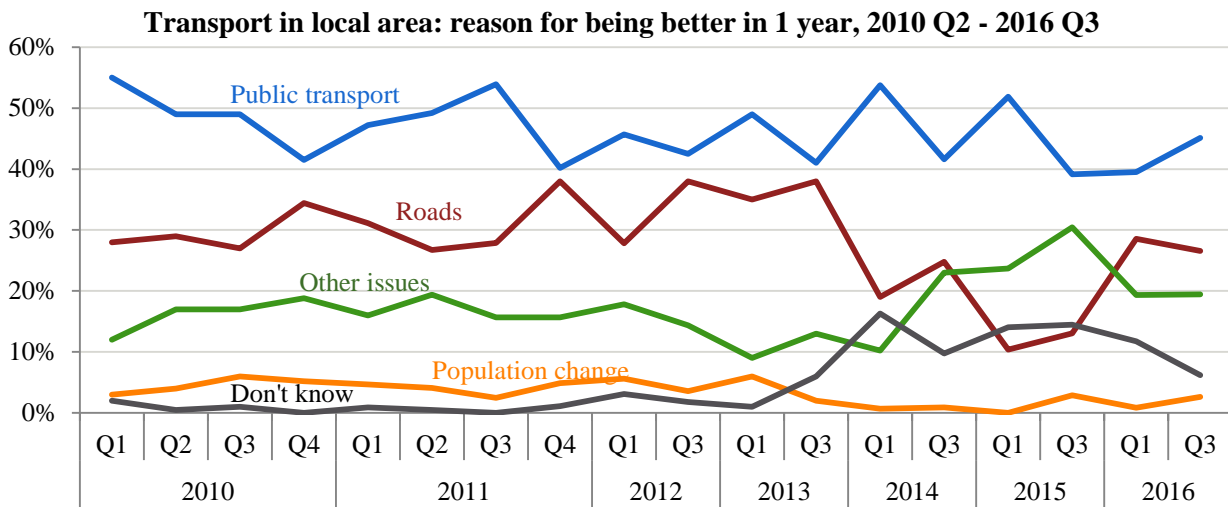
- 14% of Victoria residents believed that transport in their local area will be better in one year's time; while only 7% of South Australia residents believed the same will happen to their local transport. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

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

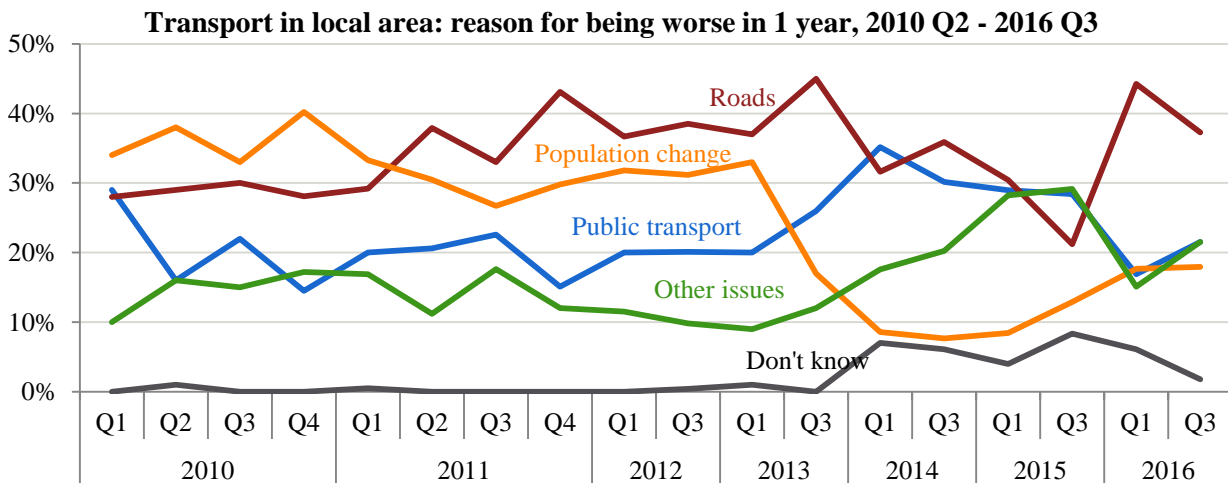


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- Public transport services are the main reasons for residents to believe that their local transport will be better (top figure) 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 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. Further, the population change, continued to increase as one of the 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.



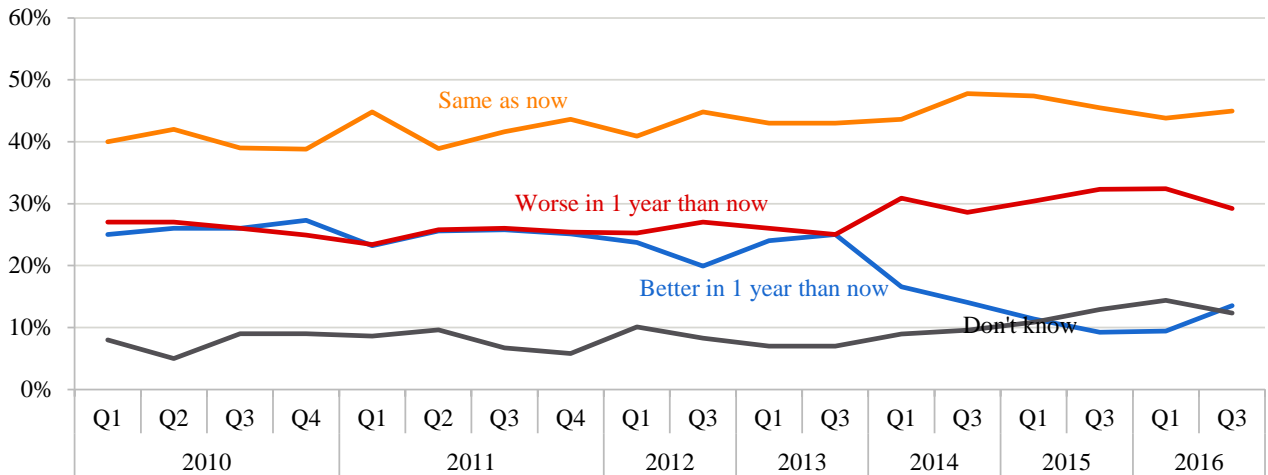
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

### 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?

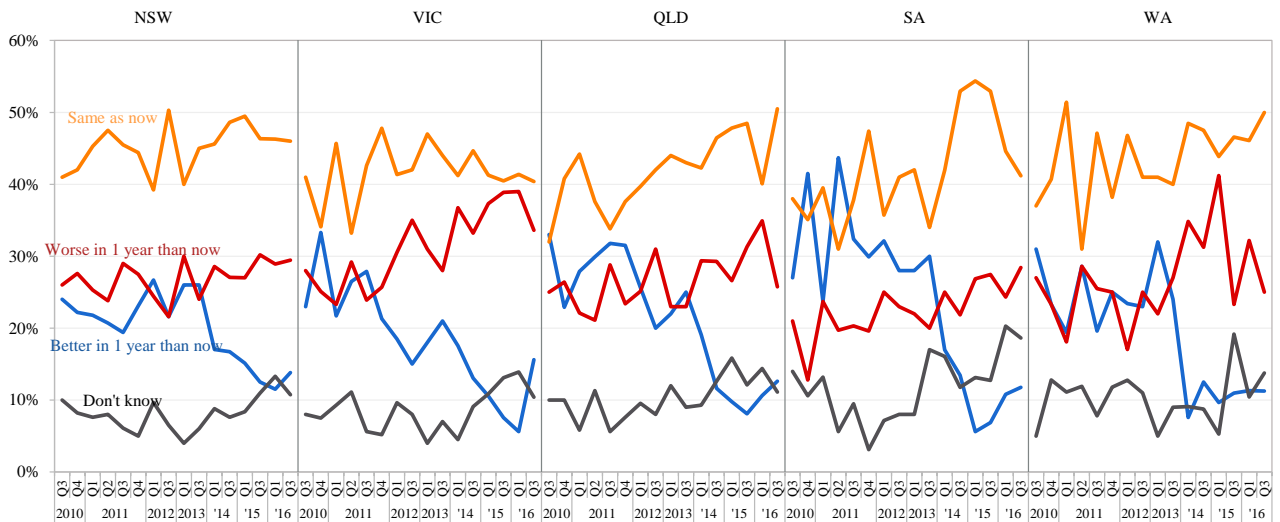
- In the September 2016 quarter, 45% of Australians said that transport in Australia in one year will be the same as now with 14% of Australians saying that transport in Australia will be better in one year's time, slightly up from 9% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2016 Q3



- Victoria residents are relatively more confident about transport in Australia in one year's time, as compared to other states, with 16% of its residents believing that transport in Australia will be better in one year's time.

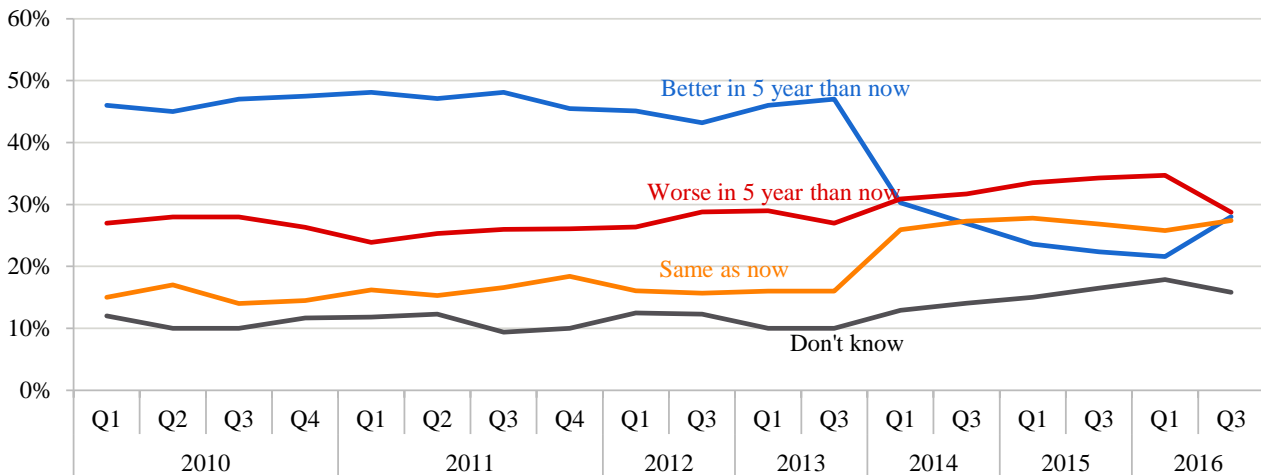
Transport in Australia in 1 year time by state, 2010 Q3 - 2016 Q3



*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?*

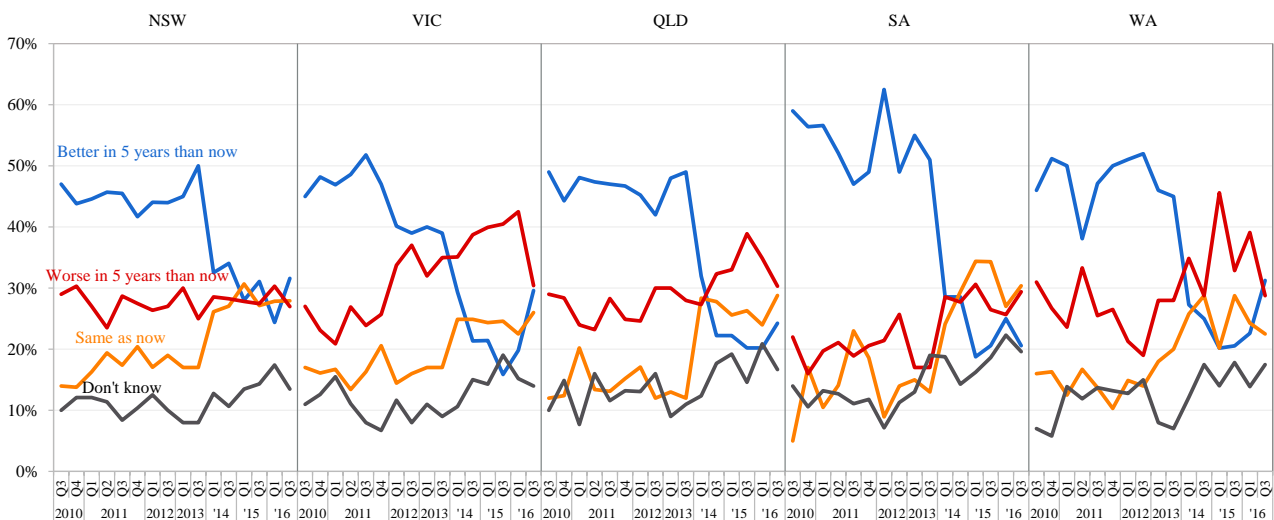
- Australians are gaining confidence (after a 3 year period of declining confidence) that transport will be better in five years than it is now. In the September 2016 quarter, 28% of Australian residents believe transport in Australia will be better in five years. For the first time, this number increases within three years after a continuous decline from March 2014 quarter. In contrast, less people believe that transport in Australia will get worse in five years' time.

**Transport in Australia in 5 years, 2010 Q1 - 2016 Q3**



- In the September 2016 quarter, about 32% of New South Wales residents think that transport in Australia will be better in five years than now, being much more confident than people living in other states. In contrast, people living in South Australia are least confident, where only 21% respondents said that transport in Australia will be better in five years' time.

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

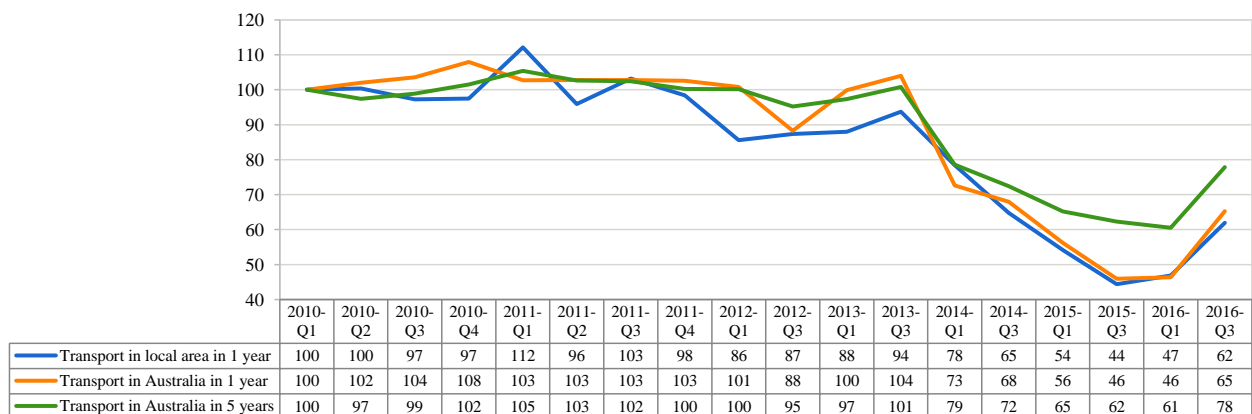
A TOPS Index value of more than 100 means that Australians’ confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2016 quarter as compared to the September 2015 quarter:

- Australians have become more confident about transport in their local area in one year’s time.
- Australians have become more confident about transport in Australia in one year’s time.
- Australians have become more 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 2016 (Confidence index: from 100 to 62), less confident about transport in Australia in one year (Confidence index: from 100 to 65), and less confident about transport in Australia in five years (Confidence index: from 100 to 78). There has been a very strong decline in confidence since September 2013; however, all three indices improve significantly in September 2016.

**ITLS TOPS Index of Transport Confidence**

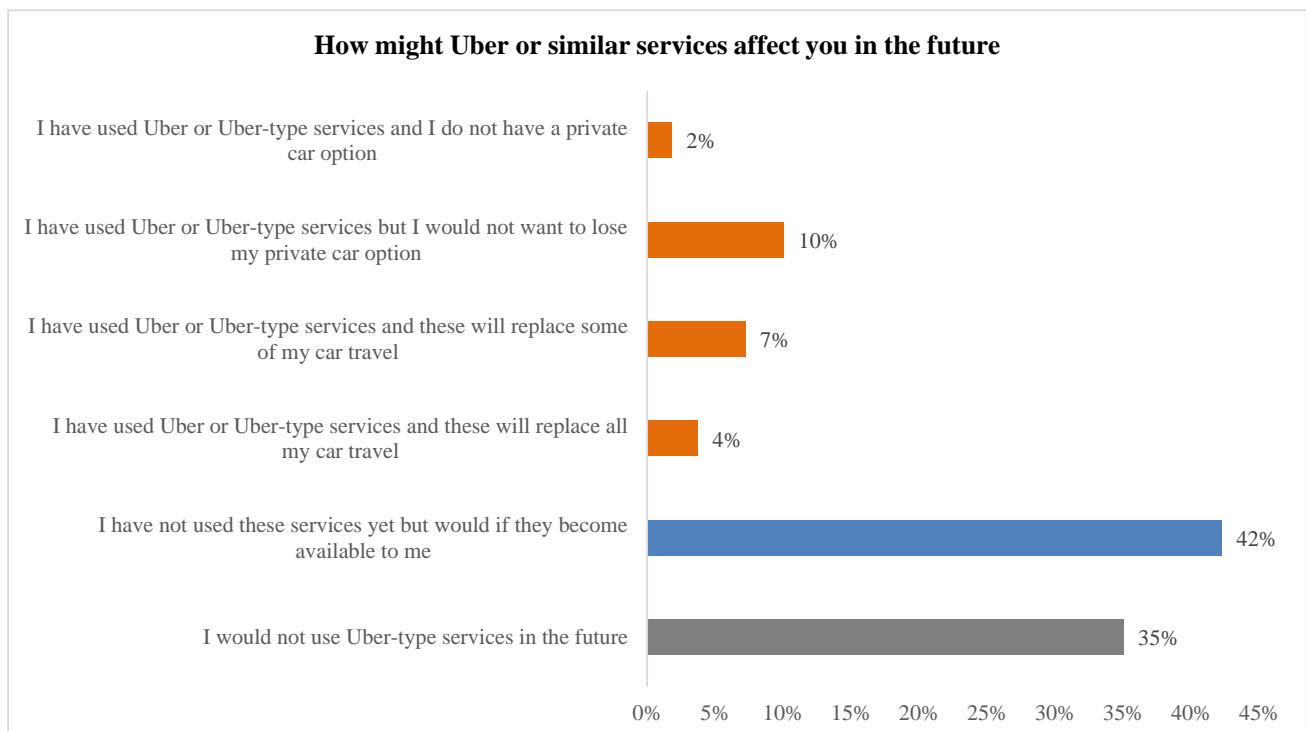


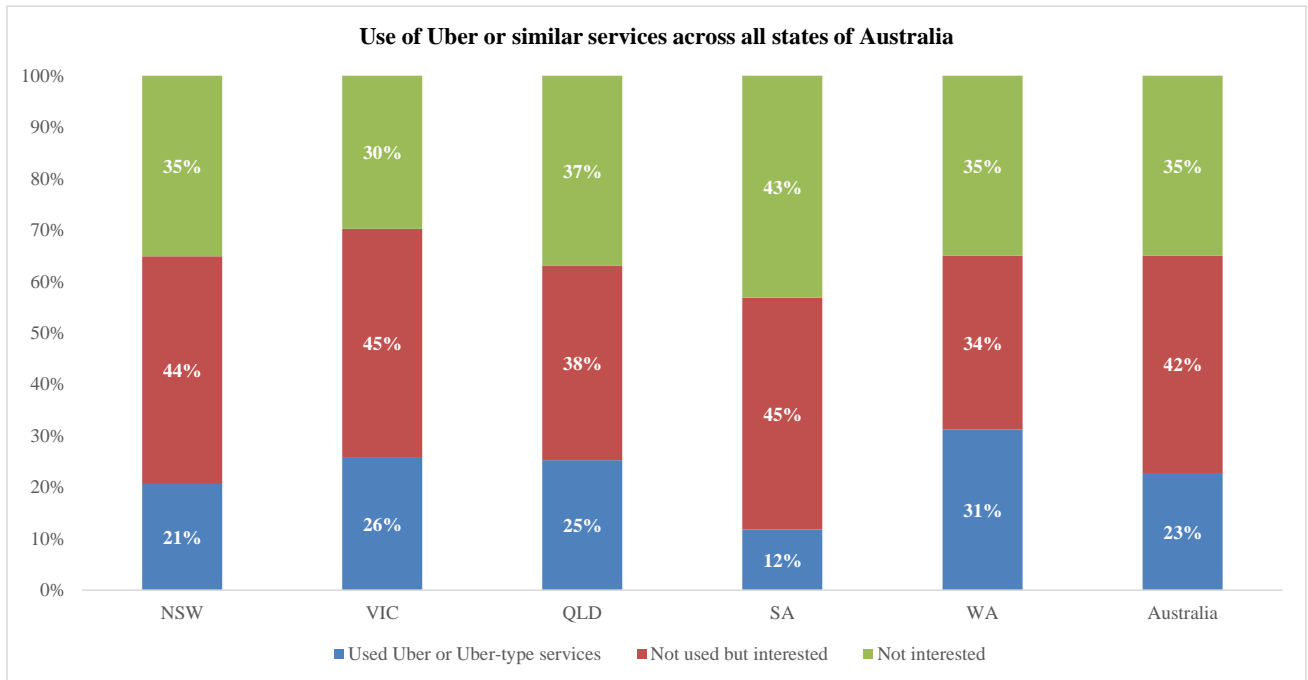
**5. Over 20% of Australians have used Uber-type services and over 40% of Australians would like to use these services in the future.**

In the September 2016 quarter, two new questions were asked to understand public opinion on Uber-type services and peer-to-peer car sharing services, such as Car Next Door, in Australia.

*Uber services, where car owners drive their own cars like taxis, and other similar services are creating a lot of interest. How might these services affect you in the future?*

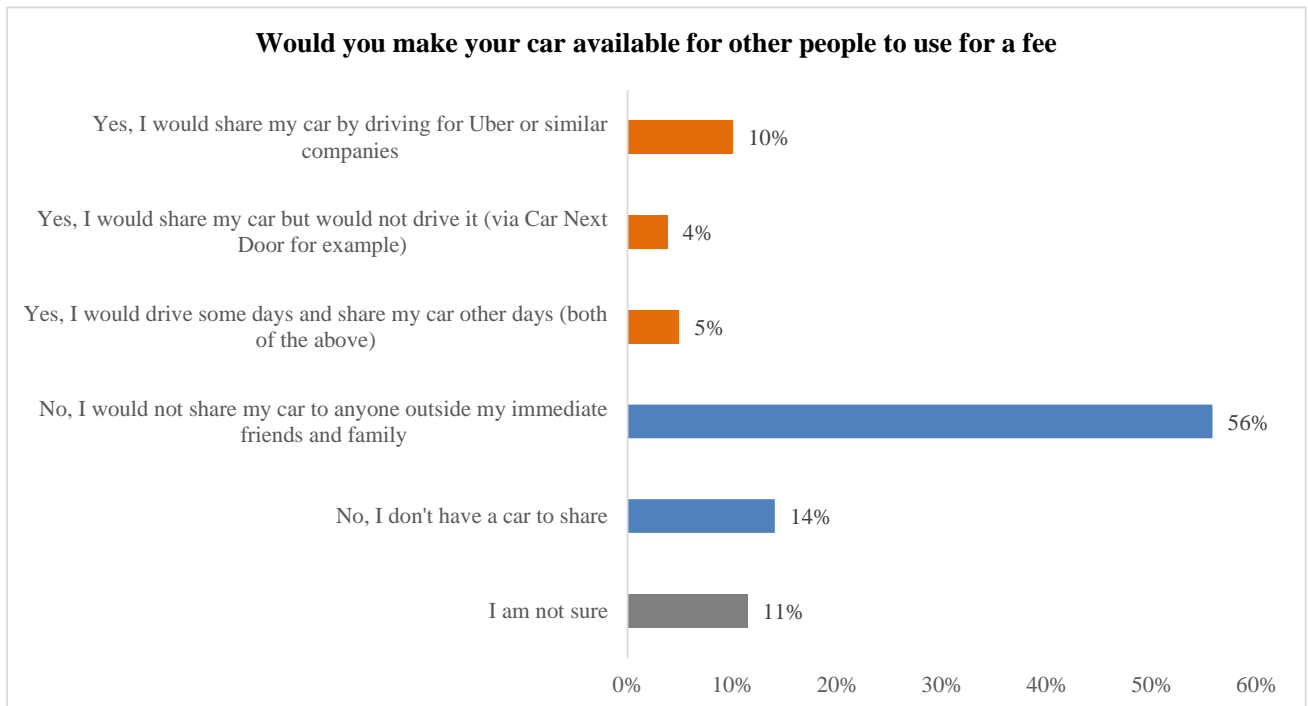
- On average, about 23% of Australian residents have used Uber or Uber-type services, about 42% indicated that they would use if the services become available to them, and another 35% said they would not use these services in the future.
- Among those who have used the Uber or Uber-type services, only 2% do not have a private car option, 10% would not want to lose their private car option, while 7% will consider replacing some of their car travel and 4% will replace all their car travel.
- Use of Uber or similar services show different patterns across all states of Australia. 31% of Western Australia residents have used Uber or similar services as compared to only 12% of South Australia residents. Over one third of residents across all states have not used the services, but are interested to use them in the future.





*In the future, would you be prepared to make your car available for other people to use for a fee (yet to be determined)?*

- Overall, about 20% of Australian residents would share their car with other people either by driving for Uber or similar companies (10%) or by peer-to-peer car sharing, such as Car Next Door (4%), or by both (5%). However, 56% of Australia residents would not like to share their car with anyone outside their immediate friends and family. In addition, there are 14% of Australia residents who do not have a car to share.



## 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
- September 2016: 1-7 September 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>

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