

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

Quarter 1, March 2018

Highlights

Infrastructure remains the same while transport increases as the highest priority national issue

- In the March 2018 quarter, 17% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, the same as in March 2017. In the March 2018 quarter, 9% of Australians nominated transport as one of the two highest priority issues in Australia today, slightly up from 6% in March 2017.

Public transport the highest priority for transport

- In the March 2018 quarter, 38% of Australians said that the highest priority issue for transport in Australia is public transport improvements, slightly up from 37% in March 2017. This is followed by road improvements (23%) and other issues (23%).

Transport not changed in local areas

- In the March 2018 quarter, 55% of Australians said that transport in their local areas is the same now as one year ago, slightly down from 57% in the March 2017 quarter.

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

- In the March 2018 quarter, 12% of Australians said that transport in their local area will be better in one year's time, slightly up from 11% in the March 2017 quarter.

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

- In the March 2018 quarter, 15% of Australians think that transport in Australia will be better in one year's time, slightly up from 14% in the March 2017 quarter.

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

- In the March 2018 quarter, 30% of Australians think that transport in Australia will be better in five years, up from 26% in the March 2017 quarter and slightly up from 28% in the September 2017.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in March 2018 Australians are less confident about transport in their local area (Confidence index: down from 100 to 63), and across Australia in one-year time (Confidence index: down from 100 to 68), and in five years (Confidence index: down from 100 to 74).

Australians preferred a regular taxi than Uber and fare is the most important reason for choosing among those services

- 39% of Australian respondents revealed they chose regular taxis over Uber or similar services (22%) while the remaining 39% of participants said that their preference depended on the circumstances. Over half of Australians (54%) said that fare is the most important factor for their decision, followed by service quality (27%) and vehicle quality (19%).

Three in five respondents would prefer one-way car share services over taxis or Uber services

- 59% of Australian participants have a greater preference for car share services instead of a taxi or Uber service for one-way trips.

About the Transport Opinion Survey

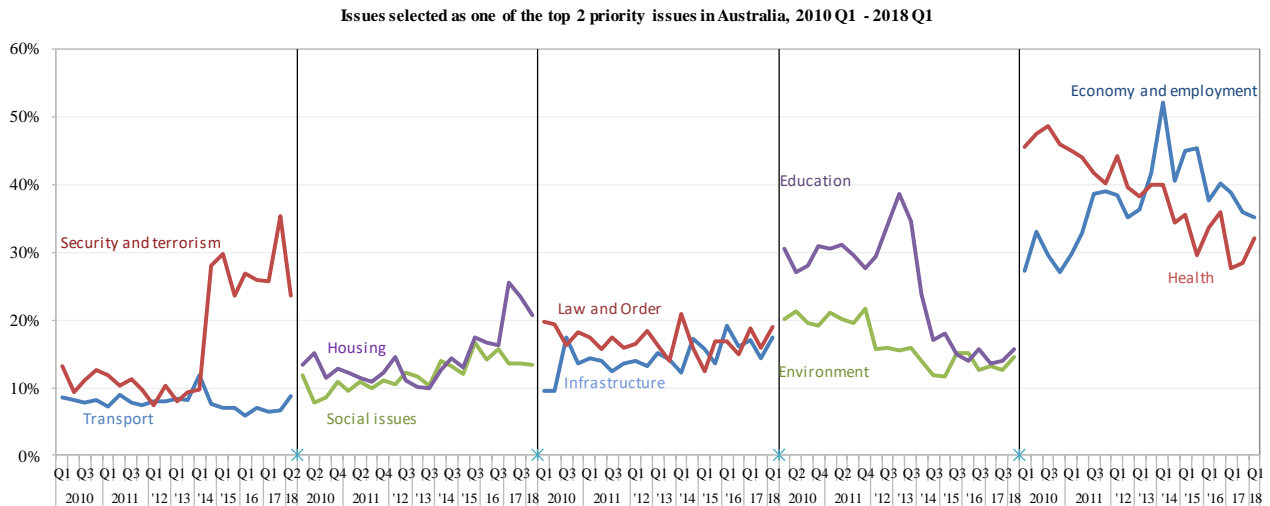
The Transport Opinion Survey is a biannual survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews were conducted by telephone by Taverner Research using trained 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 2018 survey was conducted between 26 February and 6 March 2018. This is the fourth wave of the longitudinal panel survey launched in March 2015. This report is based on the data from 1,641 completed responses, including 810 repeated samples from the last Wave and 831 fresh samples. Current issues in this quarter included asking Australian residents if they preferred to use a regular taxi or Uber when choosing such service and ranked fare, service quality and vehicle quality as reasons for selecting between those two services. The respondents were also asked on their preference for taking a car share service over taxis or Uber type services for one-way trips.

Transport as a national priority

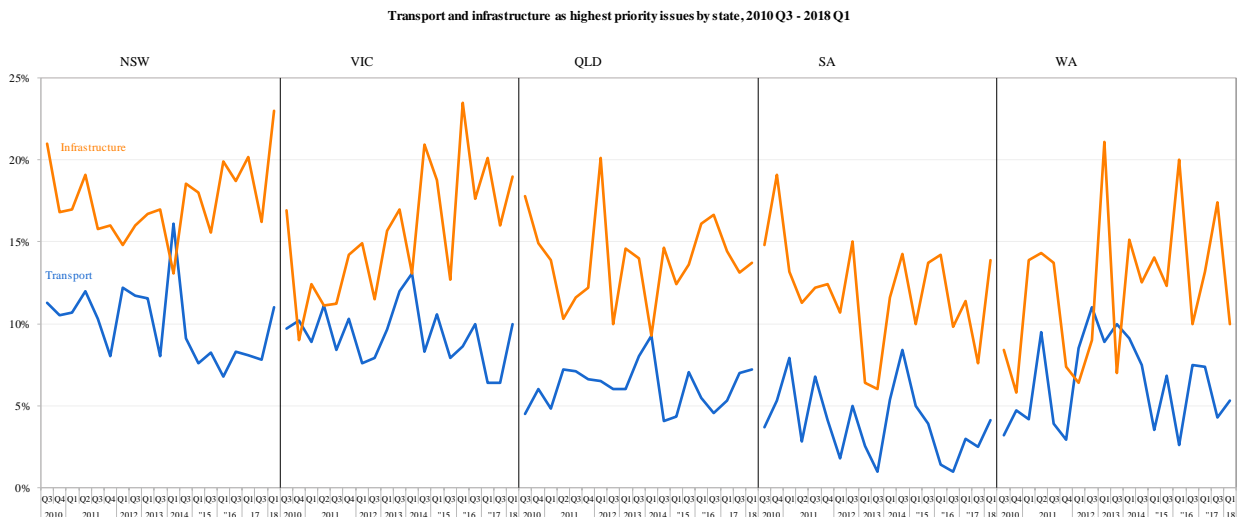
Which two of these issues do you think are the highest priority in Australia today?

- In the first quarter (Q1) of 2018, the economy and employment continued to show up as the highest priority issue in Australia, nominated by 35% of Australians, followed by health (32%). Australians were concerned and well informed about security and terrorism (24%) and housing (21%), which continued to be nominated among two top priority issues in Australia by many respondents in this quarter.
- 17% of Australians nominated infrastructure and 9% nominated transport as one of the two highest priority issues in Australia today.



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 2018, 11% of NSW residents nominated transport as a priority as compared to 4% of South Australian residents.

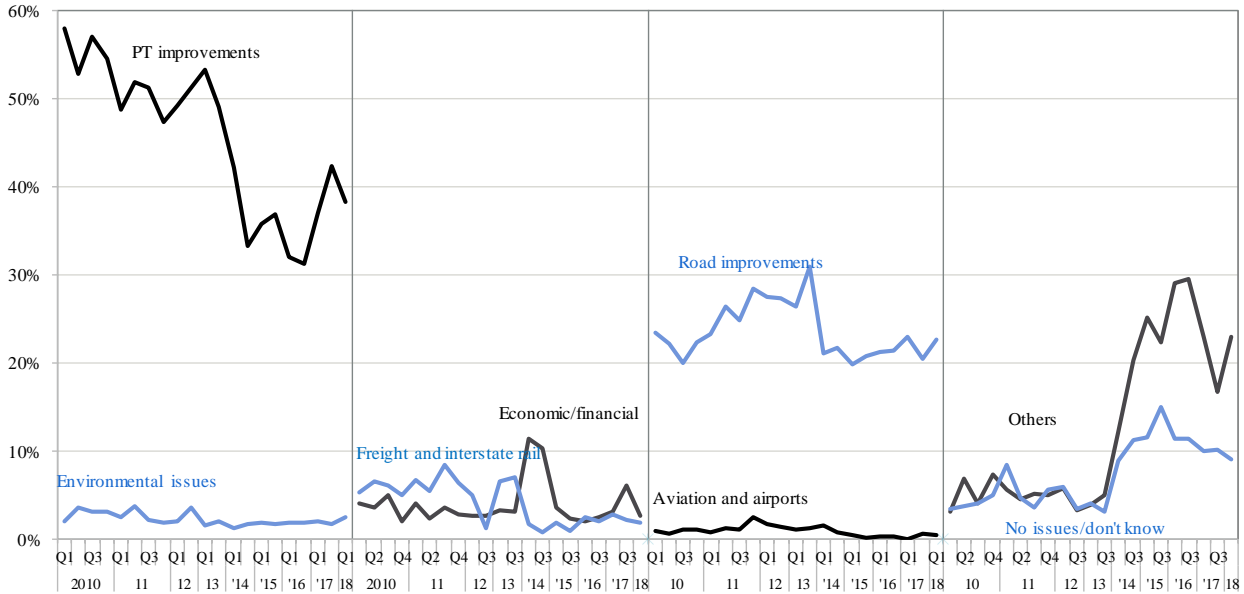


1. Highest priority issue for transport

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

- In the March 2018 quarter, 38% 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. 23% of Australians nominated each of road improvements and other issues as the second highest priority issues for transport in Australia.

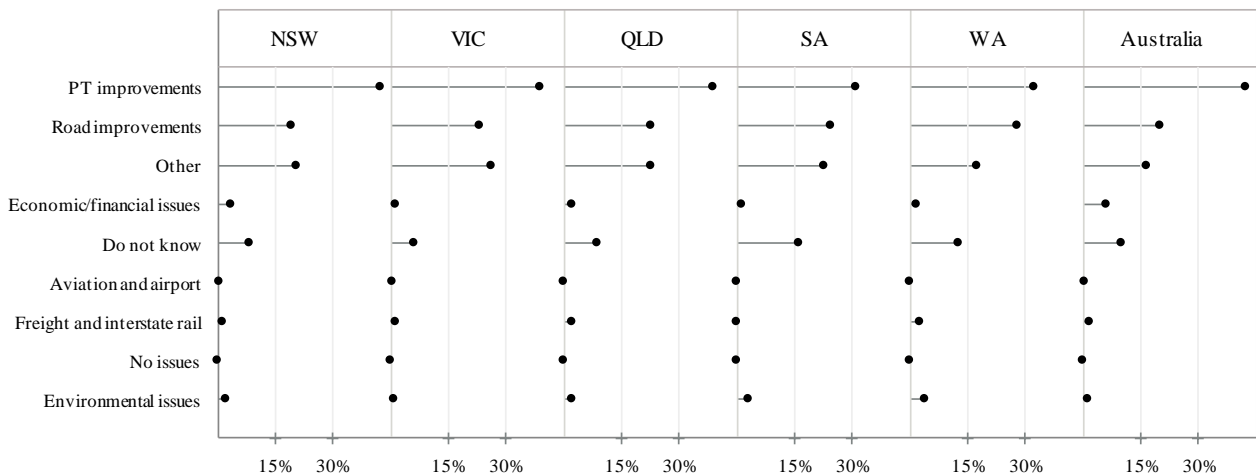
Highest priority transport issue in Australia, 2010 Q1 - 2018 Q1



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 2018 quarter, all states regarded public transport improvements as the highest priority issue in transport. The second highest priority is road improvements in South Australian and Western Australia while that is other issues, such as security and terrorism and safety issues associated with the transport system, in NSW, Victoria, and Queensland.

Highest priority transport issue by state, 2018 Q1



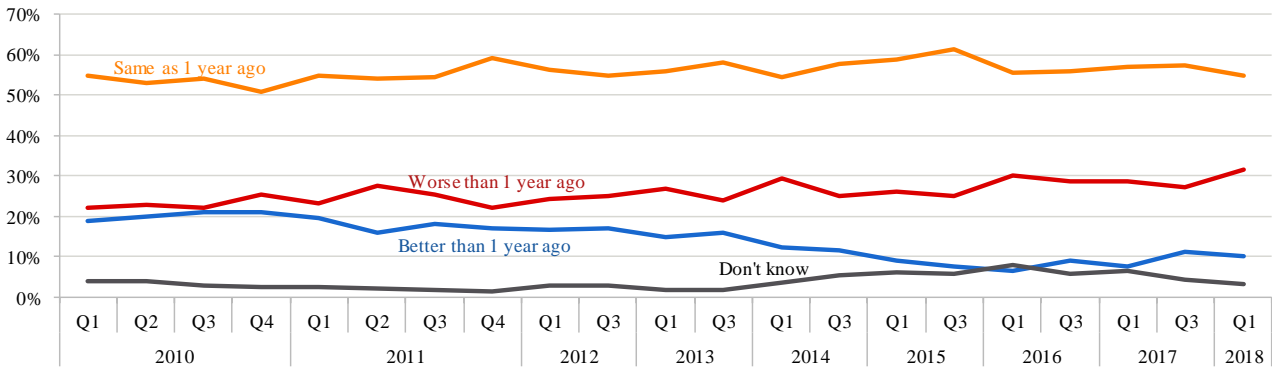
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2. Local transport does not change

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?

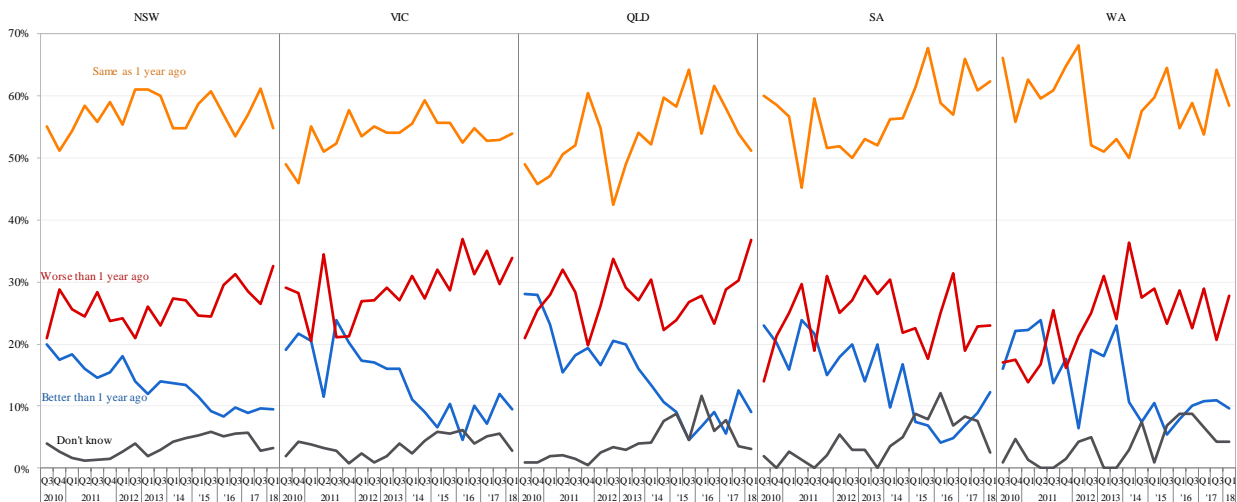
- In the first quarter of 2018, only 10% of Australians believed that transport in their local areas is better now than one year ago, while 55% of Australians said it is the same as one year ago, and 32% of Australian said it is worse now than one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 Q1 - 2018 Q1



- 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 the last quarter, there is an increase in all of states in the percentage of residents responding that transport in their local area is worse now than one year ago. In contrast, the proportion of residents thinking that transport becomes better in their local area decreases in most of states, except South Australia increasing for this category.

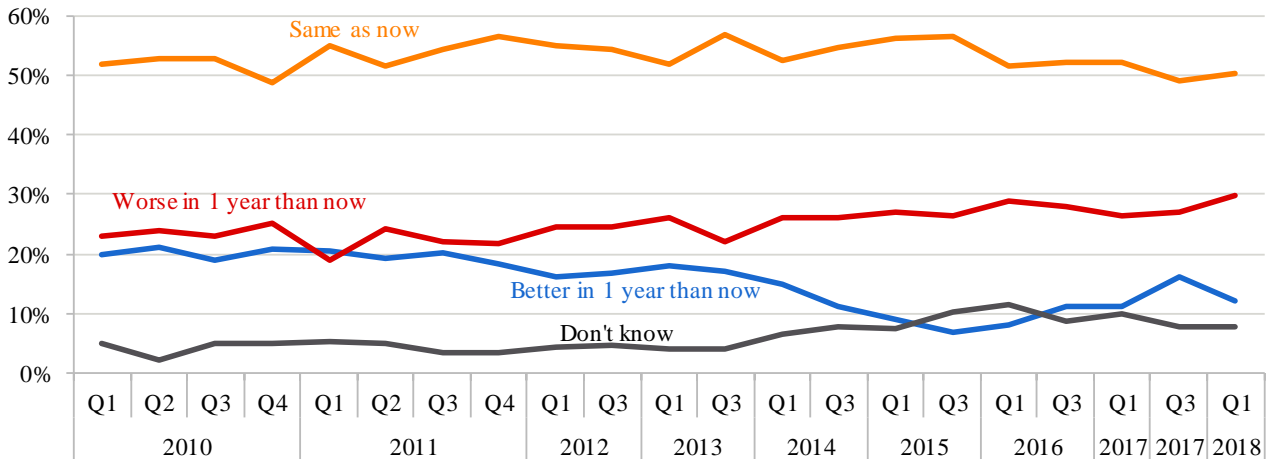
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2018 Q1



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?

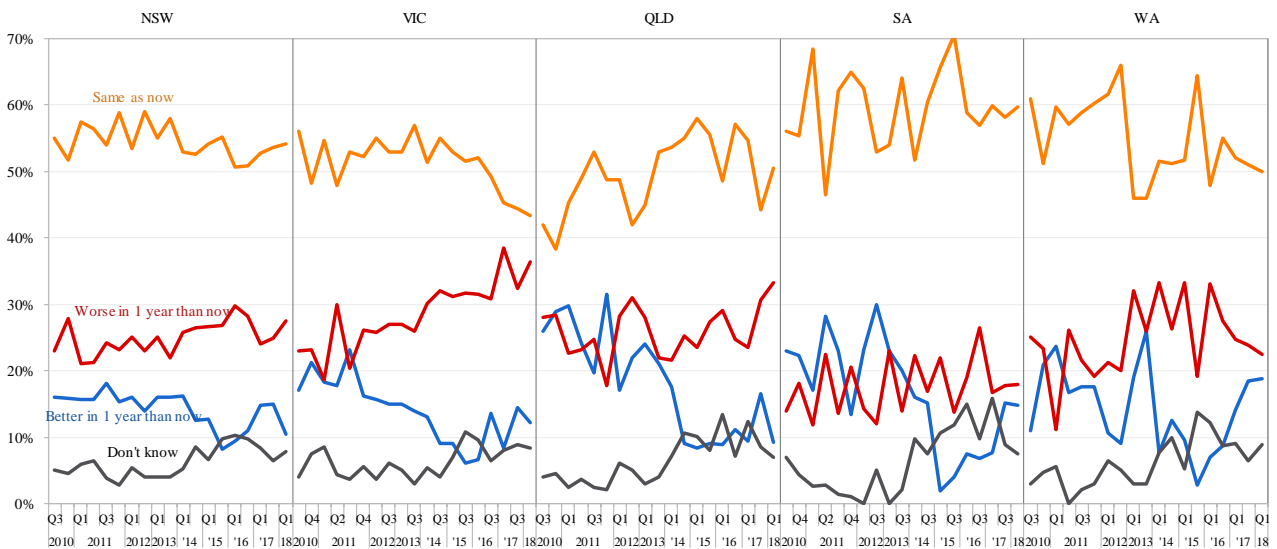
- In the March 2018 quarter, 50% of Australians said that transport in their local area will be the same in one year's time. Only 12% said transport will be better, slightly up from 11% in the March 2017 while 30% said transport will be worse, up from 26% in the first quarter of 2017.

Transport in local area in 1 year time across Australia, 2010 Q1 - 2018 Q1



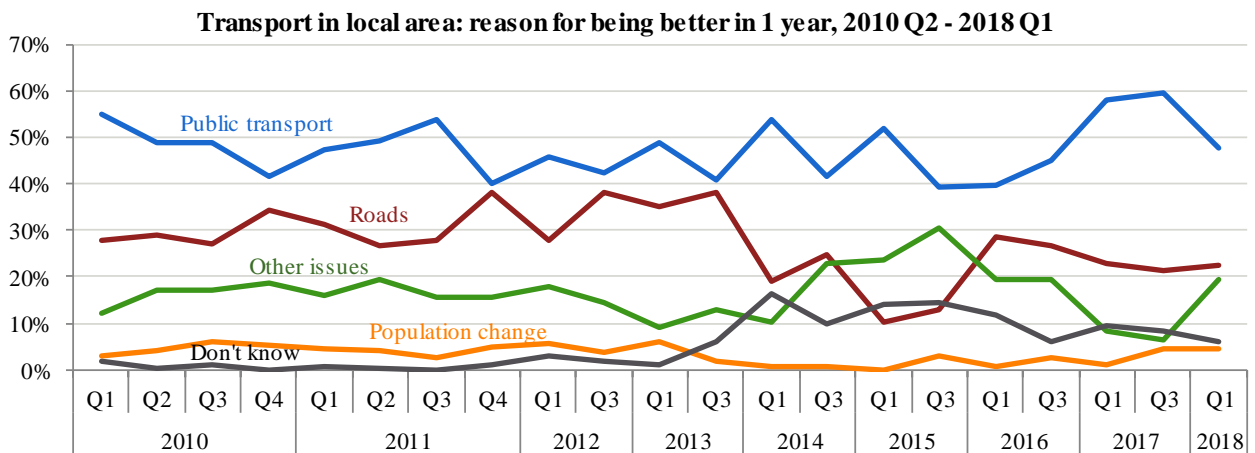
- 19% of Western Australian residents believed that transport in their local area will be better in one year's time; while 36% of Victoria residents believed that transport in their local area will be worse in one year's time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 Q3 - 2018 Q1

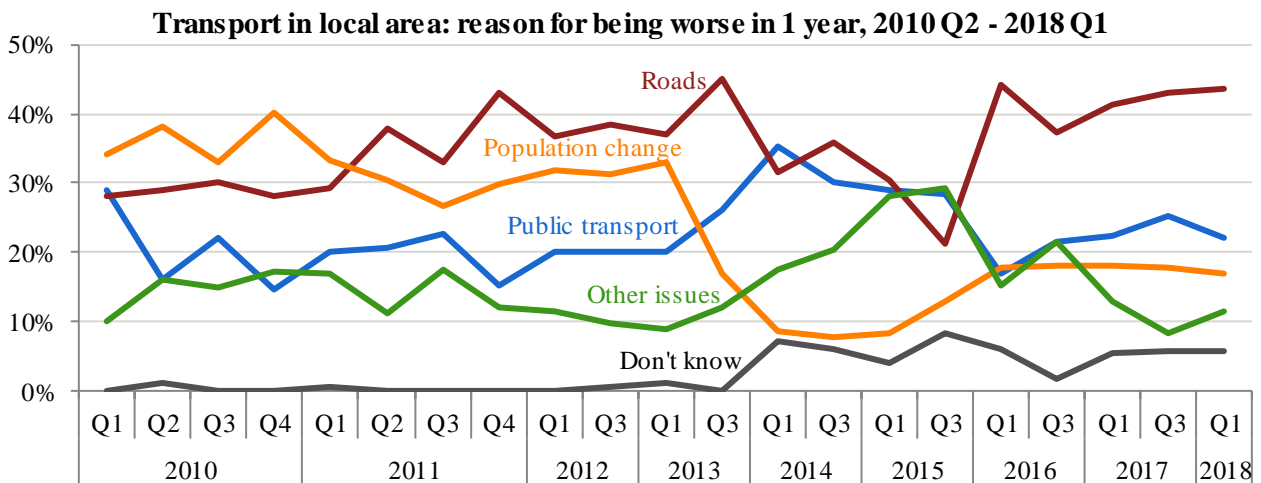


What were you thinking of most when answering that question [about transport in your local area in 1 year's time?]

- 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. Public transport decreased while roads slightly increased as compared to last year. In addition to public transport and roads, population change slightly grew as one of the main reasons for residents to believe that their local transport will be better in one year. The other issues, including economic and financial issues, government role in transport, and environmental issues, increased 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.



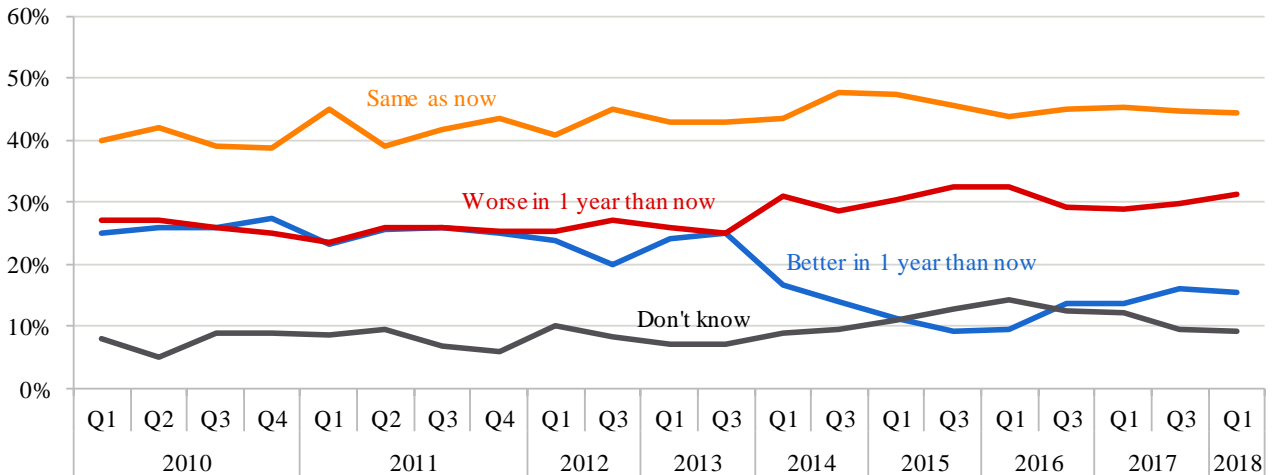
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

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?

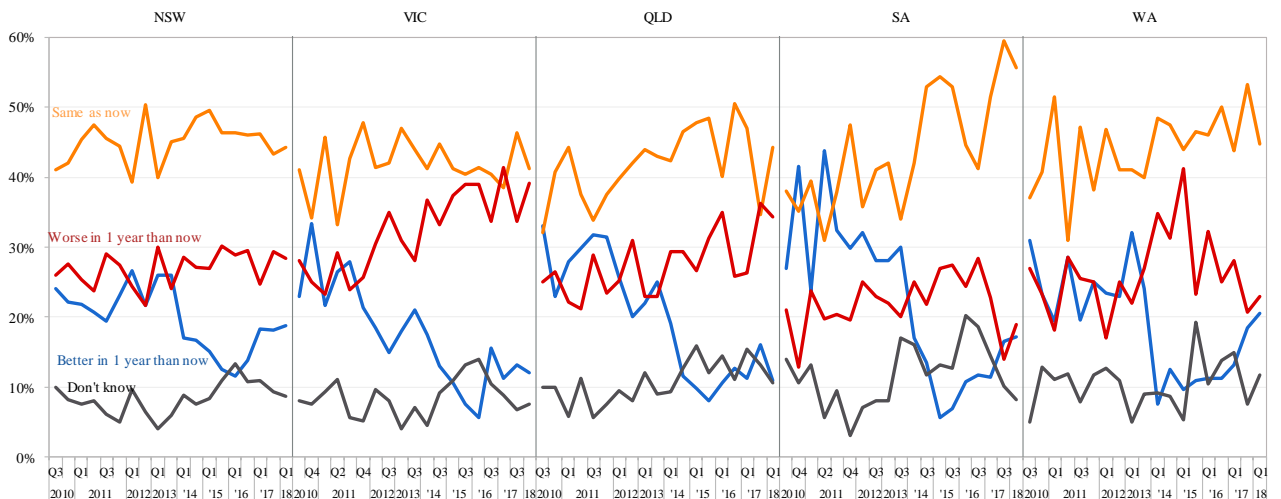
- In the March 2018 quarter, 45% of Australians said that transport in Australia in one year will be the same as now, with only 15% of Australians saying that transport in Australia will be better in one year's time, slightly up from 14% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2018 Q1



- In the March 2018 quarter, about 39% of Victorian residents said that transport in Australia will be worse in one year, and only around 12% said that it will be better. Western Australian and New South Wales residents are relatively more confident about transport in Australia in one year's time, as compared to other states, with 21% and 19% of their residents believing that transport in Australia will be better in one year's time.

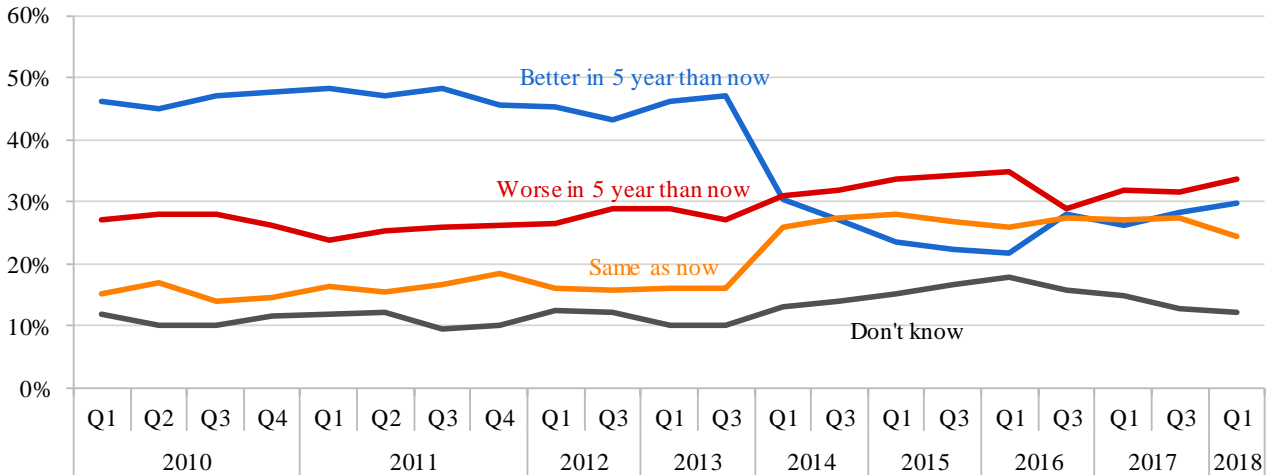
Transport in Australia in 1 year time by state, 2010 Q3 - 2018 Q1



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?

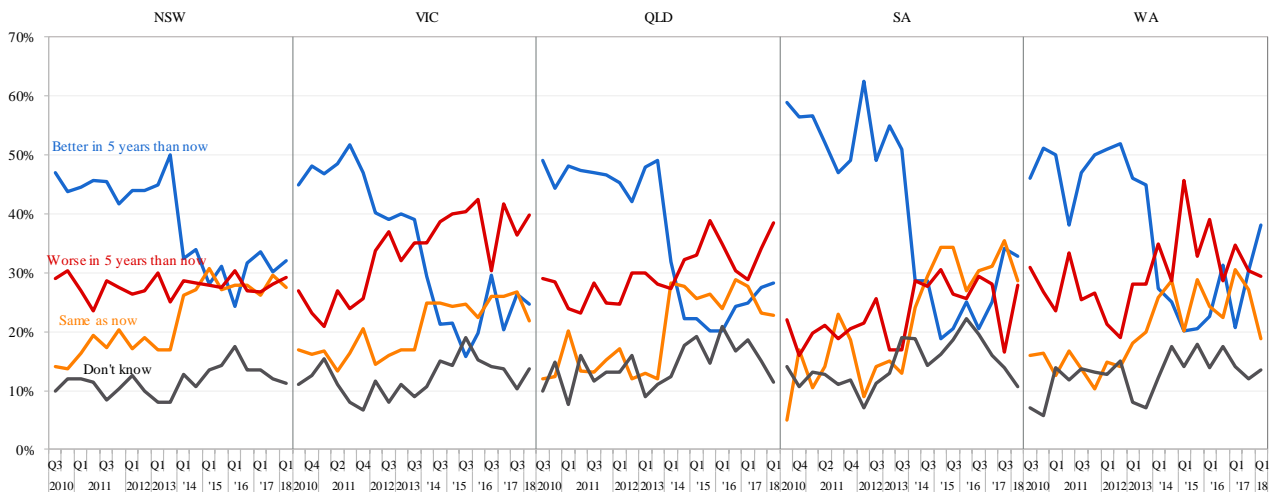
- Australians are slightly gaining confidence that transport will be better in five years than it is now. In the March 2018 quarter, 30% of Australian residents believe transport in Australia will be better in five years, up from 26% in the March 2017 quarter. More people believe that transport in Australia will get worse in five years' time compared to the March 2017.

Transport in Australia in 5 years, 2010 Q1 - 2018 Q1



- In the March 2018 quarter, 38% of Western Australian, 33% of South Australian and 32% of New South Wales residents think that transport in Australia will be better in five years time compared to now, more confident than people living in the 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 - 2018 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.

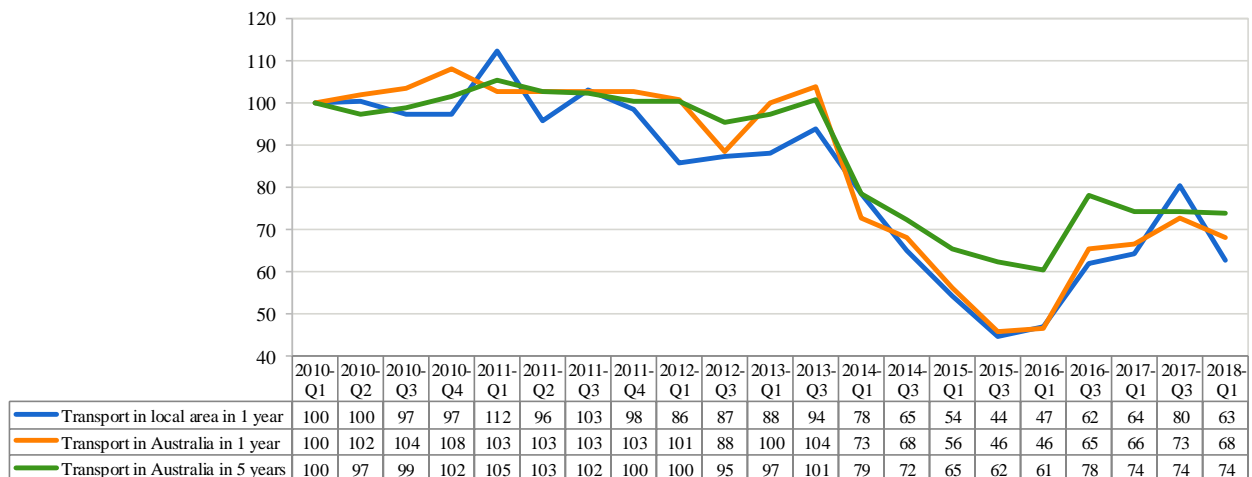
A TOPS Index value of more than 100 means that Australians’ confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2018 quarter as compared to the March 2017 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 remained at same level of confidence 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 2018 (Confidence index: from 100 to 63), less confident about transport in Australia in the next year (Confidence index: from 100 to 68), and less confident about transport in Australia in five years time (Confidence index: from 100 to 74). There has been a very strong decline in confidence since September 2013; however, all three indices have significantly recovered compared to the year 2015.

ITLS TOPS Index of Transport Confidence

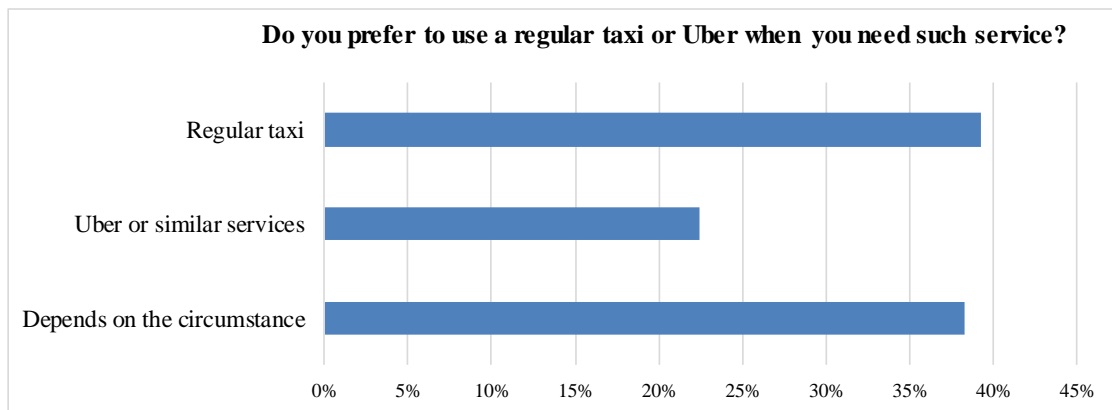


5. **Supplementary questions on choosing a Regular Taxi or Uber when necessary, the reasons for choosing among these two services, and if they prefer carshare over the former two services**

In the March 2018 quarter, three new questions were asked to understand public opinion on their preferences between a regular taxi and Uber and ranking the reasons for choosing a certain service in term of fare, service quality and vehicle quality. The respondents were also asked about their preference for taking a car share service over taxis or Uber type services for one-way trips.

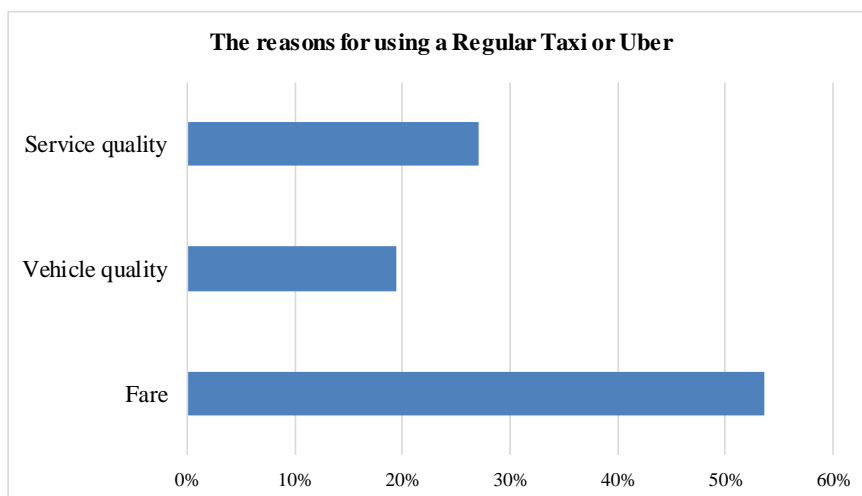
Do you prefer to use a regular taxi or Uber when you need such service?

- On average, 39% of respondents said that they preferred a Regular Taxi while only 22% of Australians revealed they chose Uber or similar services (22%) when requiring car-based taxi like services. There are approximately 39% of respondents making a decision depending on the circumstances.



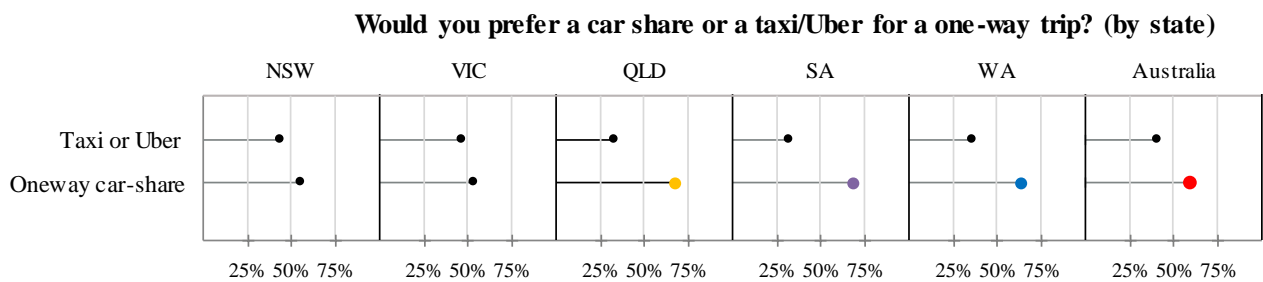
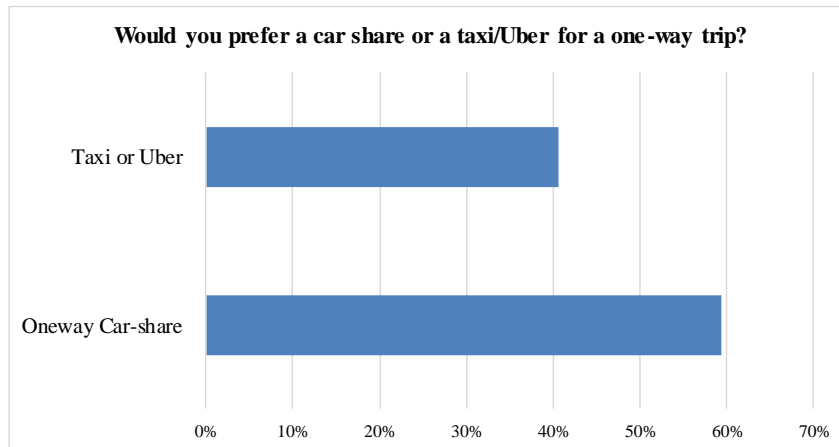
Please rank from 1 to 3 (where 1 is most important) the reasons (for using a regular taxi or Uber) in terms of fare, service quality, vehicle quality.

- Overall, the Fare stands out as the most important reason (54%) for choosing Regular Taxi or Uber, followed by service quality (27%) and vehicle quality (19%).



If you could take a car share for a one-way trip (so driving yourself instead of a taxi/Uber), would you prefer this?

- When asked about the possibility of using a car-share scheme instead of a taxi or Uber service for one-way trips, **59%** of Australians surveyed have a greater preference for car share services (top figure).
- The strongest support for one-way car share services over a taxi or an Uber is from South Australia (68%), followed by Queensland (67%) and Western Australia (64%) (bottom figure).



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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
- March 2017: 2-13 March 2017
- September 2017: 7-8 September 2017
- March 2018: 26 February - 6 March 2018

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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