

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

Quarter 3, September 2017

**Highlights**

**Infrastructure remains the same while transport decreases as the highest priority national issue**

- In the September 2017 quarter, 14% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, down from 16% in September 2016. In the September 2017 quarter, 7% of Australians nominated transport as one of the two highest priority issues in Australia today, the same as in September 2016.

**Public transport the highest priority for transport**

- In the September 2017 quarter, 42% of Australians said that the highest priority issue for transport in Australia is public transport improvements, up from 31% in September 2016. This is followed by road improvements (20%) and other issues (17%).

**Transport not changed in local areas**

- In the September 2017 quarter, 58% of Australians said that transport in their local areas is the same now as one year ago, slightly up from 56% in the September 2016 quarter.

**High level of confidence about local transport in the short-term**

- In the September 2017 quarter, 16% of Australians said that transport in their local areas will be better in one year's time, up from 11% in the September 2016 quarter.

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

- In the September 2017 quarter, 16% of Australians think that transport in Australia will be better in one year's time, slightly up from 14% in the September 2016 quarter.

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

- In the September 2017 quarter, 28% of Australians think that transport in Australia will be better in five years, the same as the September 2016 quarter and slightly up from 26% in the March 2017.

**ITLS Index of Transport Confidence**

- Compared to the launch of TOPS in March 2010, in March 2017 Australians are less confident about transport in their local area (Confidence index: down from 100 to 80), and across Australia in one year time (Confidence index: down from 100 to 73), and in five years (Confidence index: down from 100 to 74).

**One in four Australians consider buying autonomous vehicles (AVs) for using or renting out when not using**

- Twenty six percent of respondents think that they will purchase AVs for their use but only seven percent of these AV adopters intend to lease out their vehicles when they are not in use. Conversely, about three in five Australians state they will continue using conventional cars when AVs go on sale.

**All of respondents believe that self-driving vehicles will affect their daily travel in different ways**

- Around two in four Australian residents consider using AVs to replace some public transport trips if the AVs are not very expensive.

**About the Transport Opinion Survey**

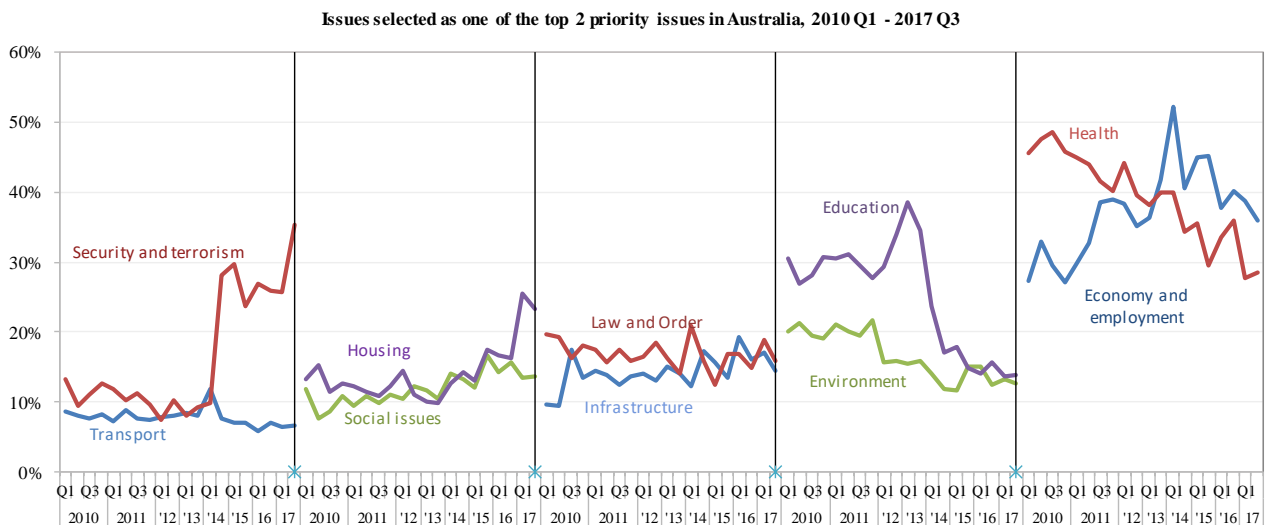
The Transport Opinion Survey is a biannual survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews were conducted by telephone by Taverner Research using trained 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 3, September 2017 survey was conducted between 7 and 8 September 2017. This report is based on the data from 999 completed responses. Current issues in this quarter included asking Australian respondents for their thoughts about future use of self-driving vehicles and impacts of self-driving vehicles in their daily travel.

## Transport as a national priority

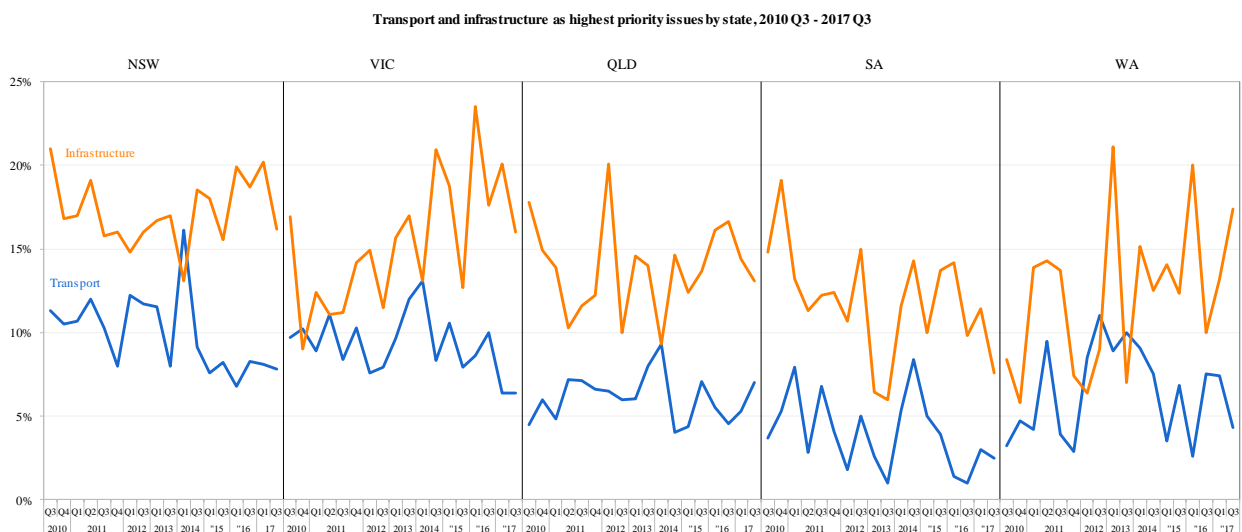
Which two of these issues do you think are the highest priority in Australia today?

- In the third quarter (Q3) of 2017, the economy and employment continued to show up as the highest priority issue in Australia, nominated by 36% of Australians, followed by security and terrorism (35%). Since March 2010, there is a significant increasing concern about housing (23%) and significant decreasing concerns about health (28%) and education (14%). Australians are well concerned and well informed about social issues, which continued to be nominated as one of the top two priority issues in Australia by many respondents in this quarter.
- 14% of Australians nominated infrastructure and 7% 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 3 of 2017, 8% of NSW residents nominated transport as a priority as compared to 3% of South Australian residents.

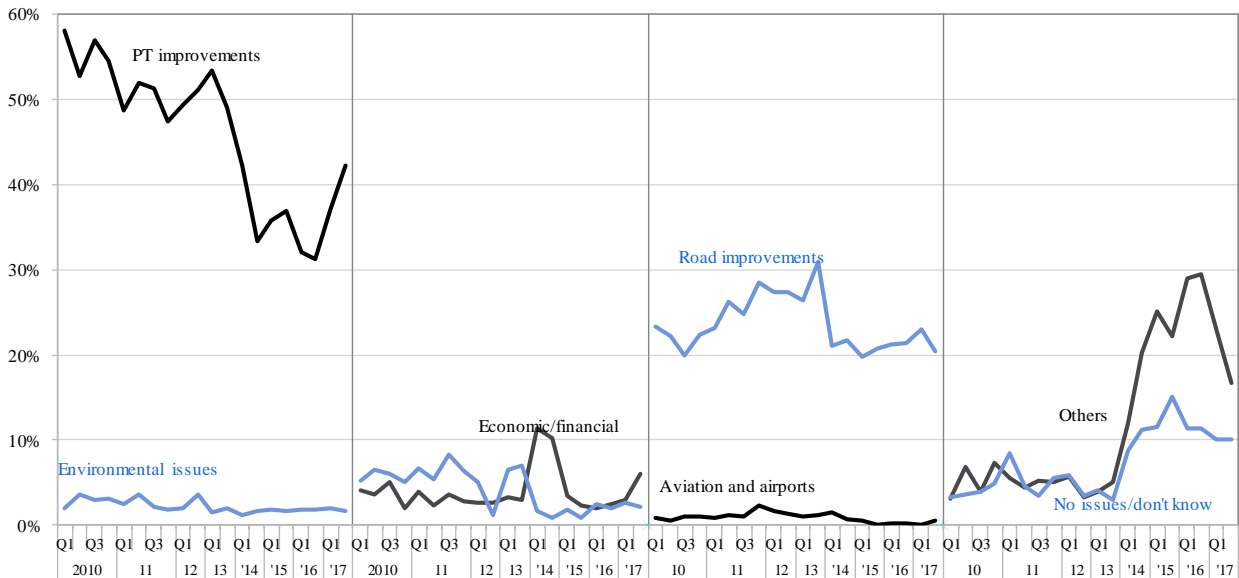


### 1. Highest priority issue for transport

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

- In the September 2017 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 in 2010. 20% of Australians nominated road improvements as the second highest priority issues for transport in Australia, followed by other issues (17%).

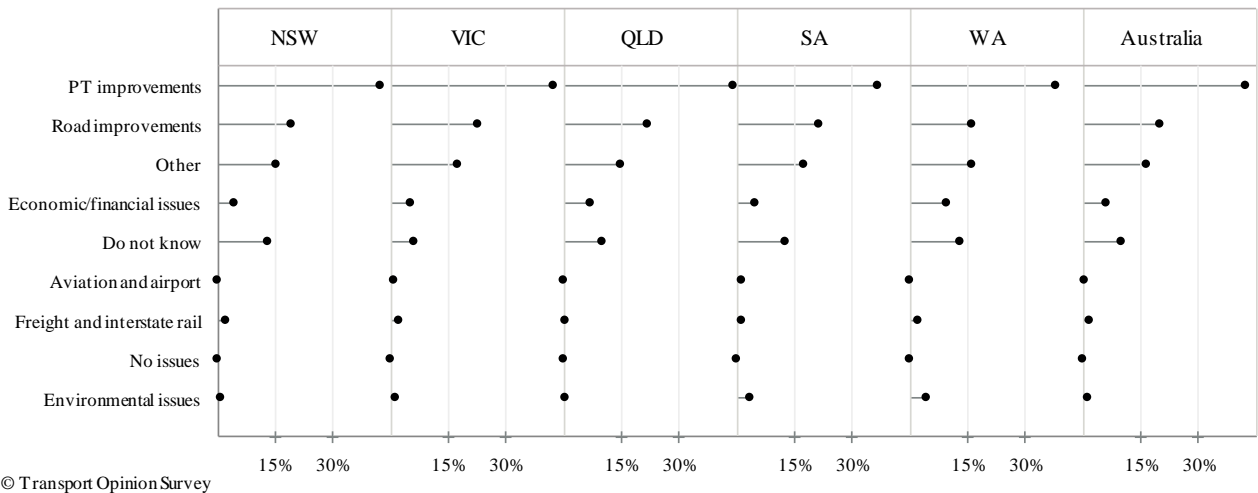
**Highest priority transport issue in Australia, 2010 Q1 - 2017 Q3**



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 2017 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 the transport system.

**Highest priority transport issue by state, 2017 Q3**



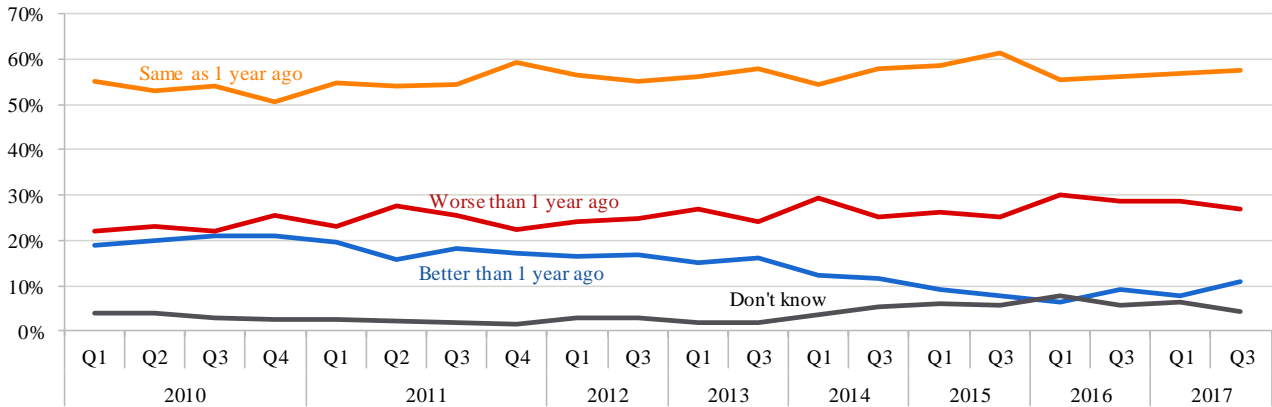
© Transport Opinion Survey

## 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?*

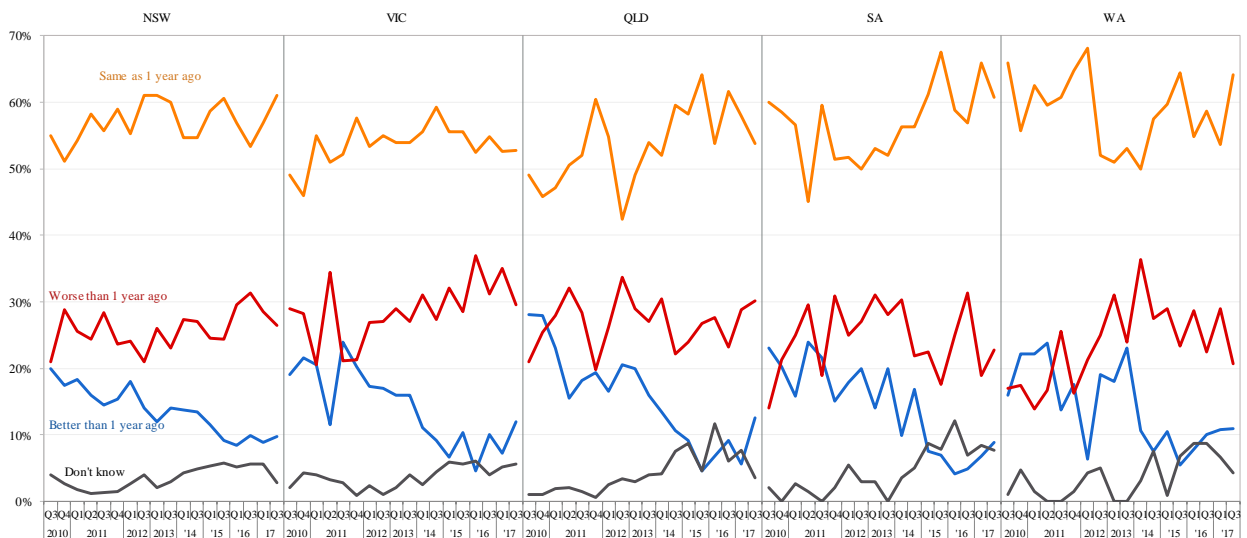
- In the third quarter of 2017, only 11% of Australians believed that transport in their local areas is better now than one year ago, while 58% of Australians said it is the same as one year ago, and 27% of Australian said it is worse now than one year ago.

Transport in local area compared to 1 year ago across Australia, 2010 Q1 - 2017 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 the last quarter, there is a slight increase in most of states in the percentage of residents responding that transport in their local area is better now than one year ago, except Western Australia remaining the same for this category.

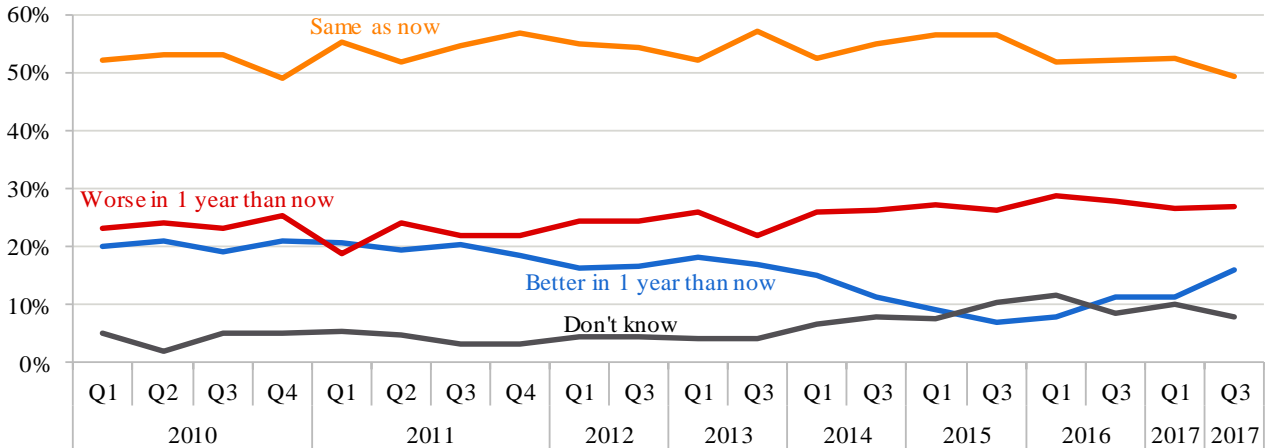
Transport in local area compared to 1 year ago by state, 2010 Q3 - 2017 Q3



*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?*

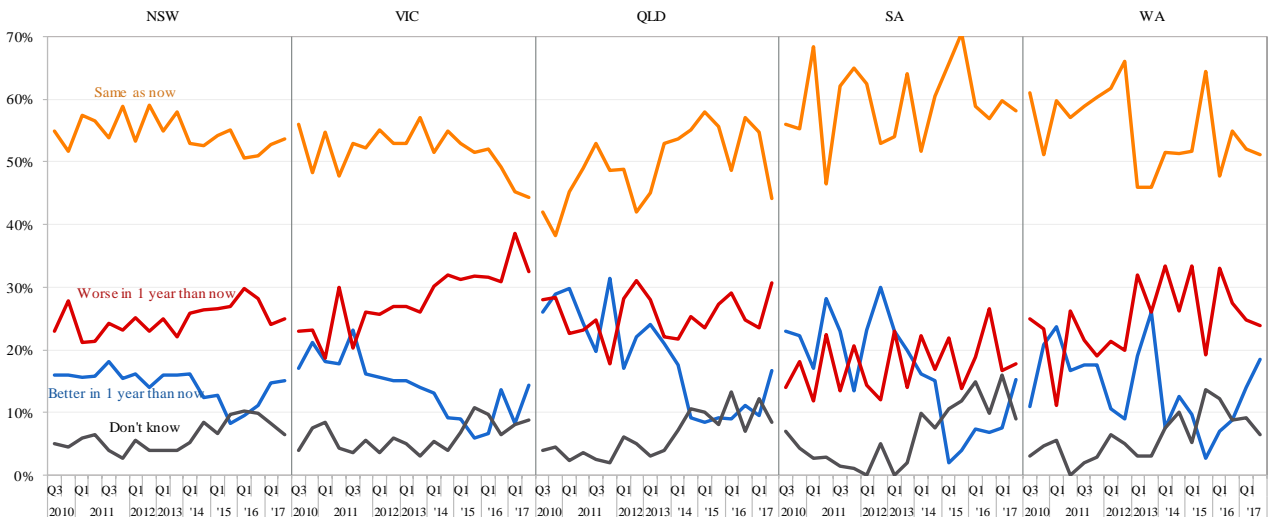
- In the September 2017 quarter, 49% of Australians said that transport in their local area will be the same in one year's time. 16% said transport will be better, slightly up from one year ago at 11% in the third quarter of 2016.

**Transport in local area in 1 year time across Australia, 2010 Q1 - 2017 Q3**



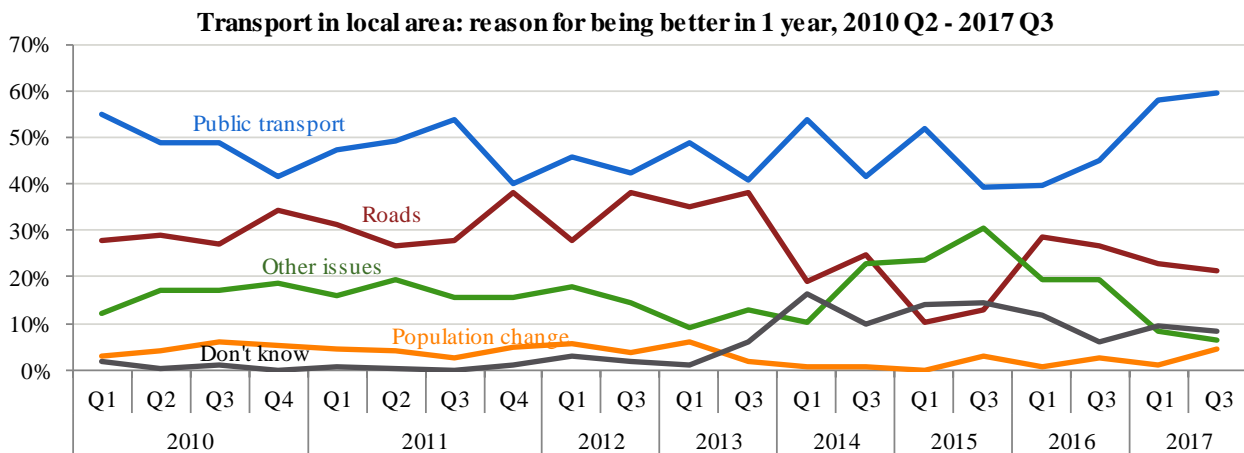
- 19% of Western Australian residents believed that transport in their local area will be better in one year's time; while 32% of Victoria residents believed that transport in their local area will be worse in one year's time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

**Transport in local area in 1 year time by state, 2010 Q3 - 2017 Q3**

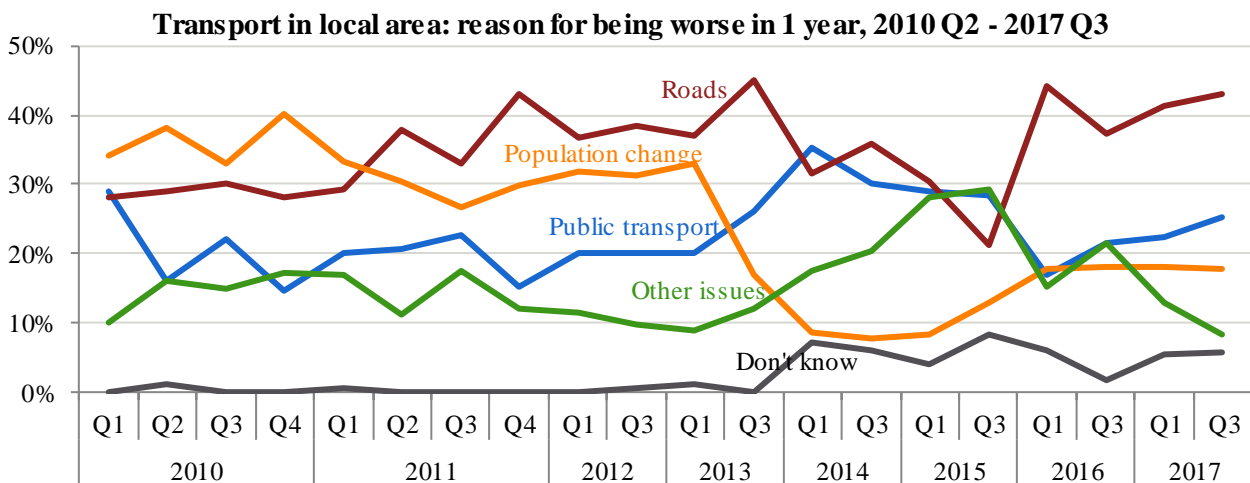


What were you thinking of most when answering that question [about transport in your local area in 1 year's time?]

- 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, both of these reasons increased as compared to last year. In addition to public transport, 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, continued to decline 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.



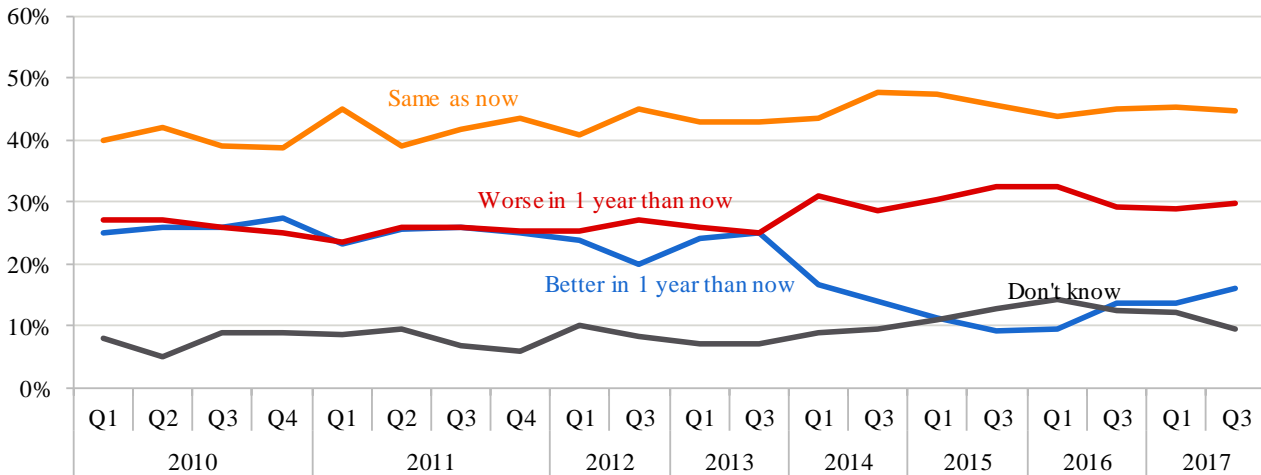
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

### 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?*

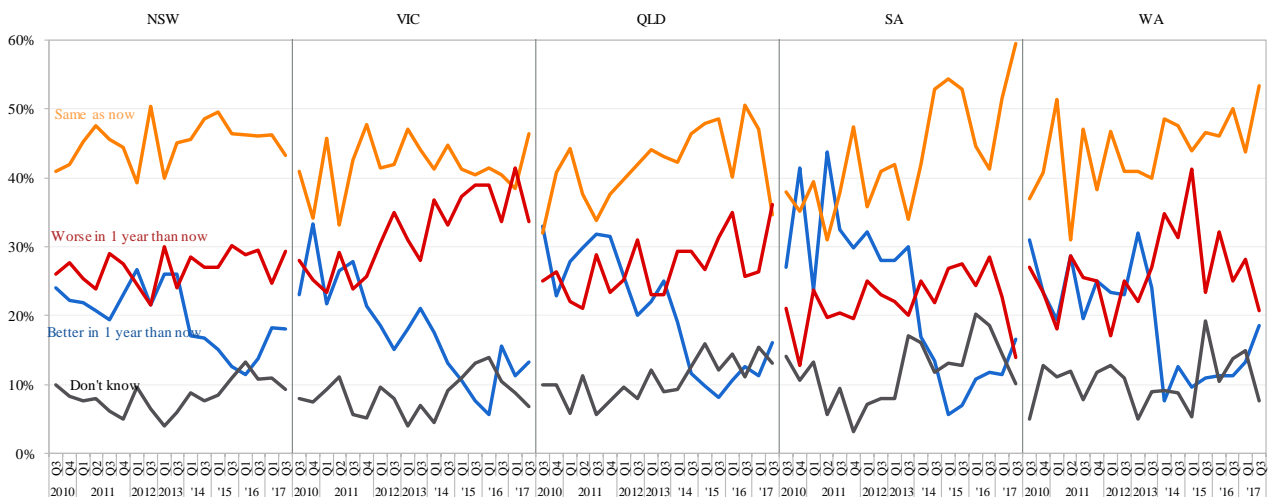
- In the September 2017 quarter, 45% of Australians said that transport in Australia in one year will be the same as now, with only 16% of Australians saying that transport in Australia will be better in one year's time, slightly up from 14% in the same quarter last year.

**Transport in Australia in 1 year, 2010 Q1 - 2017 Q3**



- In the September 2017 quarter, about 34% of Victorian residents said that transport in Australia will be worse in one year, and only around 13% 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 19% and 18% 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 - 2017 Q3**

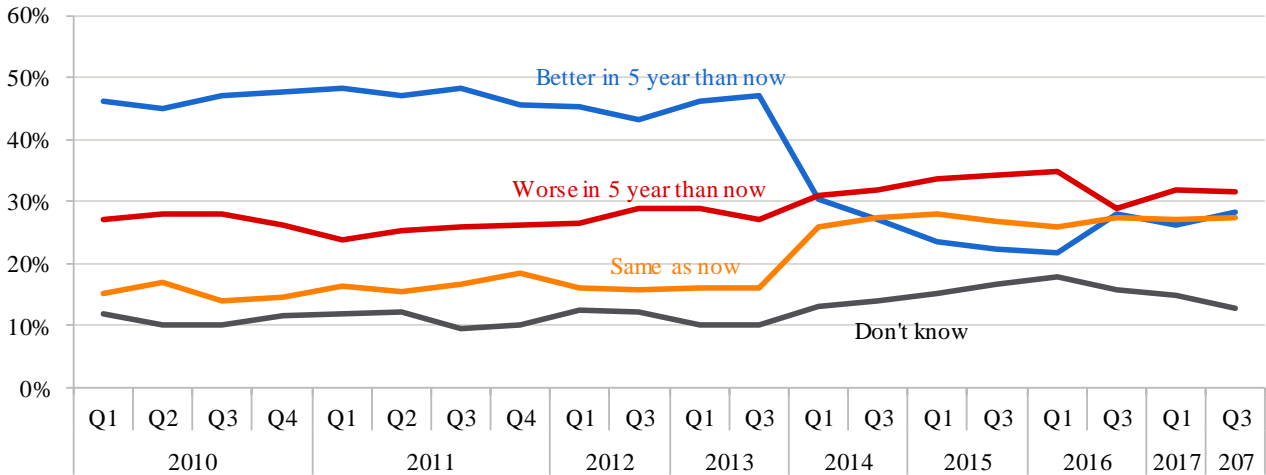




Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

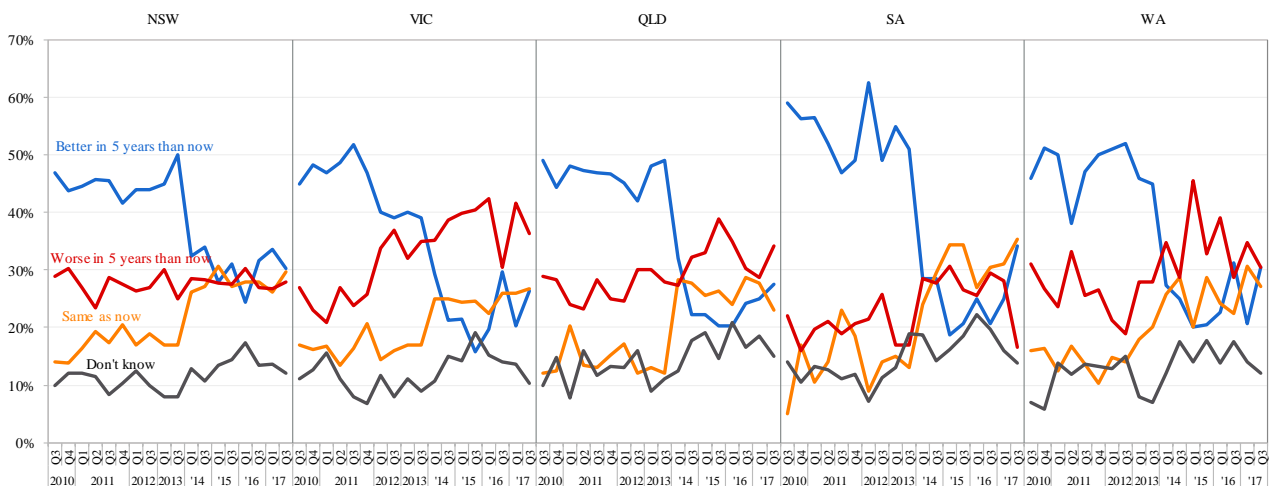
- Australians are losing confidence that transport will be better in five years than it is now. In the September 2017 quarter, 28% of Australian residents believe transport in Australia will be better in five years. This number has remained the same as the September 2016 quarter. More people believe that transport in Australia will get worse in five years' time compared to the September 2016.

Transport in Australia in 5 years, 2010 Q1 - 2017 Q3



- In the September 2017 quarter, 34% of South Australian, 30% of each of New South Wales and Western Australian residents think that transport in Australia will be better in five years time compared to now, a little more confident than people living in other states. In contrast, people living in Victoria are least confident, where 36% respondents said that transport in Australia will be worse in five years' time.

Transport in Australia in 5 years by state, 2010 Q3 - 2017 Q3



#### 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.

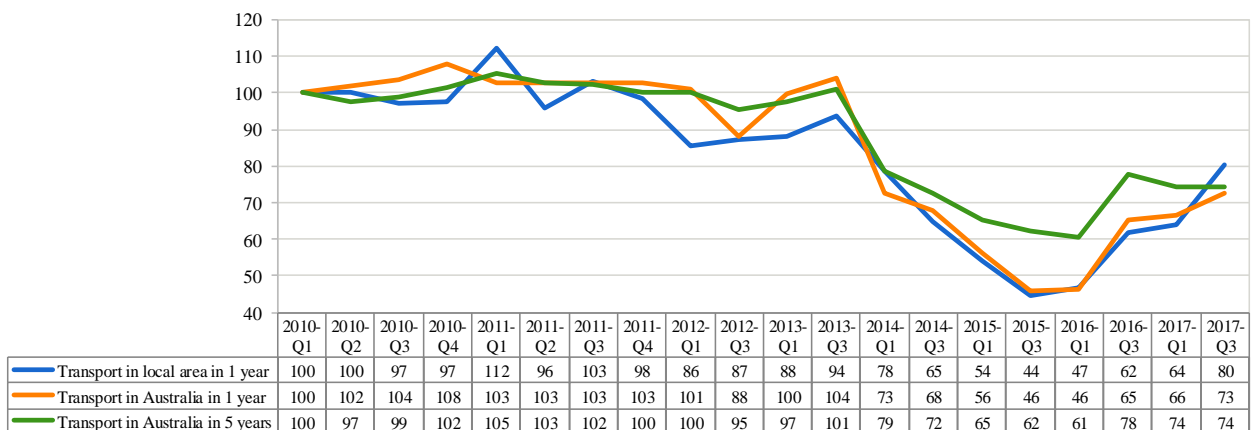
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2017 quarter as compared to the September 2016 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 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 September 2017 (Confidence index: from 100 to 80), less confident about transport in Australia in the next year (Confidence index: from 100 to 73), 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

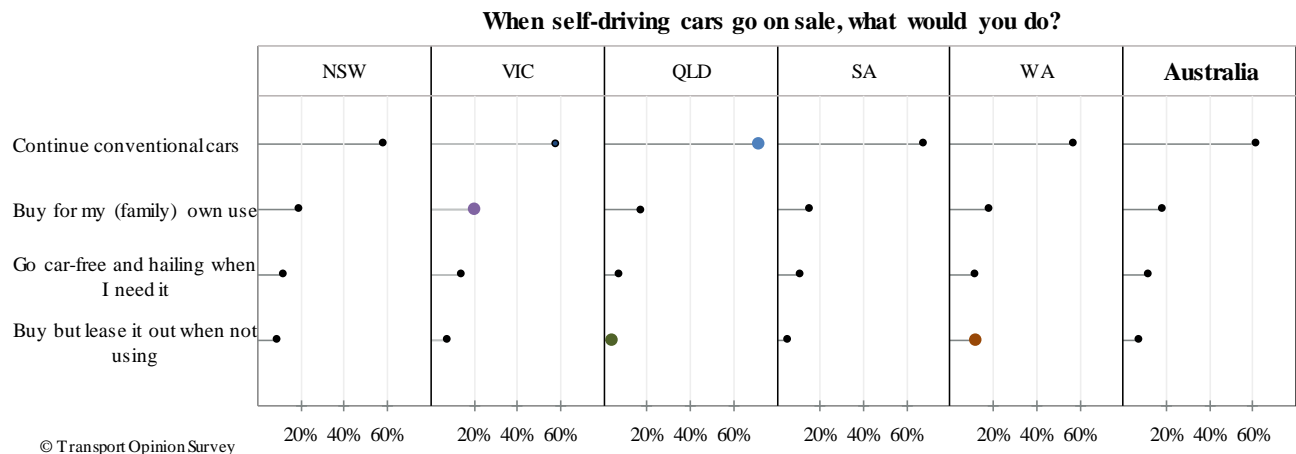


## 5. Supplementary questions on future use of self-driving vehicles and their impacts in daily travel

In the September 2017 quarter, two new questions were asked to understand public opinion on their thoughts about self-driving future sales and effects of self-driving vehicles or autonomous vehicles (AVs) in their daily travel.

*Trials of self-driving vehicles have taken place on Australian roads. When self-driving cars go on sale, what would you do?*

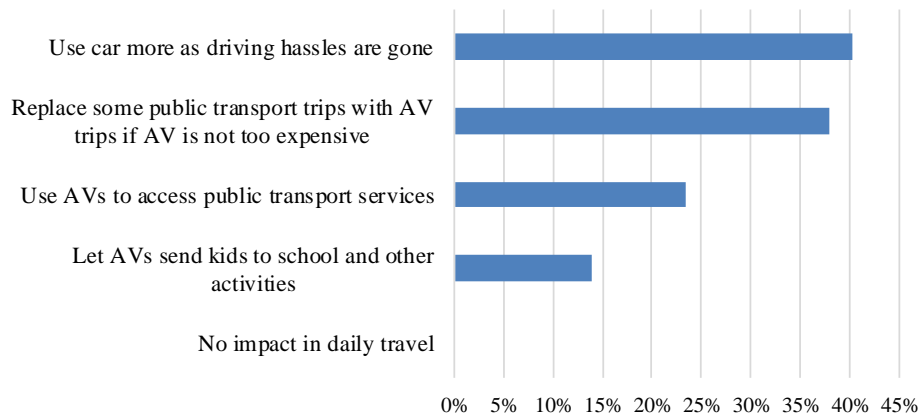
- On average, 62% of respondents think that they will continue to use or buy conventional cars while only 26% of Australians guess they would consider buying self-driving vehicles for their or family use (19%) or leasing out when the AVs are not in use (8%). There are 12% of respondents thinking going car-free and hailing when necessary.
- Queensland accounts for the highest percentage of residents thinking that they keep using conventional cars with about 71% and the lowest proportion of residents considering not using cars and hailing when necessary (7.5%). Meanwhile, Western Australian respondents make up the greatest proportion for purchasing VAs but renting it out when it is not in use (12%), whereas Victorians make up the highest percentage for buying self-driving cars for personal/family utility (20%).



*How do you think self-driving cars will impact your (family) daily travel?*

- Overall, all Australian residents believe that the autonomous cars have impacts in their (family) daily travel in different ways.
- Two in five Australians feel they will use cars more as driving will become less hassles with AVs. 38% of Australian residents consider replacing some public transport trips with AV trips if the AVs are not very costly, followed by using AVs to access public transport. Fewer residents respond that they let AVs drive kids to schools and other activities.

**How do you think self-driving cars will impact your (family) daily travel?**



## 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

## 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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