

Public Transport Survey 2023

Research Results

March to April 2023





Background and Objectives

Initially introduced in 2022, the Public Transport Survey is intended to assist Public Policy with understanding travel behaviours and attitudes across Queensland. This is an annually tracking survey to gauge trends in public transport usage.

Advocating for better public transport services is a priority for Public Policy and obtaining useful data relating to attitudes and perceptions regarding public transport will help inform this advocacy.

Research Objectives:

- Understand the public transport attitudes and perceptions across Queensland
- Learn how travel patterns have changed across the public transport network
- Understand what type of initiatives are more likely to encourage people to use public transport
- Enable more specific and informed advocacy in relation to the public transport network
- Collect data from all public transport age cohorts and users (i.e. commuters, recreational, education, etc.)

Please note: findings from the origin-destination mapping section of this survey will be reported separately from this pack.



Approach & Participants

- Online Quantitative study, unbranded survey distributed via independent research panel, PureProfile. Tracking annually.
- Sample:
 - Total n=1,221.
 - Survey fieldwork dates: 24 March to 26 April 2023
- Sample coverage: Queensland population - representative of gender and age (16+). Coverage of towns that have any public transport infrastructure: Brisbane, Gold Coast, Moreton Bay, Sunshine Coast/Noosa, Redlands, Logan, Ipswich, Toowoomba, Cairns, Townsville.

Definitions:

- “Public Transport” is abbreviated to PT throughout this report.
- “Weekly User” stands for PT users at least once per week;
- “Monthly User” stands for PT user between ‘once a month’ and ‘multiple times a month’;
- “Irregular User” stands for PT user less than once per month.

Public Transport Survey 2023 - Key Findings (1 of 3)

OVERALL RESULTS

- ❖ **Overall Public Transport (PT) usage significantly increased since 2022, with Queenslanders further indicating that they are using PT more now than 12 months ago.** Brisbane and Gold Coast have the highest proportions of PT users; 4 out of 5 in these locales, typically use 2 or more PT types. PT usage was significantly lower in Toowoomba relative to the rest of QLD.
- ❖ **Weekly usage of PT appears to decrease with age, while monthly usage remains fairly consistent until retirement age.**
- ❖ **General improvement suggestions for PT in Queensland saw over 1 in 10 desire improved safety and security measures while 1 in 20 believe PT should be made free, and if not, cheaper to access.** Amongst non-users, having expanded network connections alongside more frequent, reliable service would be some of the top encouragements.
- ❖ **8% of PT Users have mobility and/or access requirements.** As such, priorities emergent amongst these users include Concessions, Accessibility Measures, Safety Measures, and Improved User Infrastructure.
- ❖ **Net familiarity with RACQ’s advocacy role is seen to have significantly increased since last year. Amongst Queenslanders there was a notable increase in desire for RACQ to advocate for PT initiatives** including things such as expanded PT and Road Infrastructure as well as more affordable fares.

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Public Transport Survey 2023 - Key Findings (2 of 3)

REGIONS SUMMARY

BRISBANE

- ❖ Brisbane residents continue to be significantly more likely to be Public Transport Users and to use PT on a weekly basis, compared with other locations in Queensland. Almost two-thirds of Brisbane residents use buses or trains.
- ❖ *More appealing fare structure & More frequent services* were selected by over half of Brisbane residents and were the top “most important” initiatives.

GOLD COAST

- ❖ Gold Coast residents exhibit above-average Public Transport Usage. Tram/light-rail usage in Gold Coast is significantly above the rest of the state, as is Shuttle Bus usage. Non-usage dropped slightly since 2022 with upticks both in weekly and irregular PT Usage.
- ❖ *More appealing fare structure & More frequent services* were selected by over half of Gold Coast residents and were the top “most important” initiatives.

MORETON BAY

- ❖ Moreton Bay residents exhibit slightly below-average Public Transport Usage. Train usage in Moreton Bay is significantly above the rest of the state, while Bus and Ferry usage is significantly lower. Non-usage dropped somewhat since 2022 with upticks in weekly, monthly and irregular PT Usage.
- ❖ *More appealing fare structure and More direct services* were selected by over half of Moreton Bay residents and were the top “most important” initiatives. *Better parking* was a ‘most important’ initiative relatively more for Moreton Bay residents compared to the QLD average. *More frequent service* was significantly less likely to be a ‘most important’ initiative.

SUNSHINE COAST & NOOSA

- ❖ Sunshine Coast residents exhibit slightly below-average Public Transport Usage compared with other locations in Queensland. Usage of most transport forms was lower in Sunshine Coast, significantly so for Ferry and Tram/Light Rail, except for Shared car and Shuttle bus usage which were slightly higher. Non-usage dropped somewhat since 2022 with a particular uptick in weekly PT Usage.
- ❖ *More appealing fare structure* was selected by 1 in 2 Sunshine Coast residents as well as the “most important” initiative, however *service frequency* and *security measures* follow closely. *Frequent hygiene* was significantly less likely to be a ‘most important’ initiative than the QLD average.

REDLANDS

- ❖ Redlands residents exhibit Public Transport Usage consistent with the state-wide average. Ferry usage is significantly higher here while Tram/light rail usage is somewhat lower. Non-usage dropped slightly since 2022 with a significant uptick in monthly PT Usage.
- ❖ *More frequent service* was most likely to be the ‘most important’ initiative to Redlands residents, while *fare structure* and *direct service* follow closely. *Ability to travel with bikes/scooters* was relatively more likely to be a ‘most important’ initiative while *frequent hygiene* was less likely.



Public Transport Survey 2023 - Key Findings (3 of 3)

REGIONS SUMMARY

LOGAN

- ❖ Logan residents exhibit slightly lower Public Transport Usage relative to the state-wide average. Usage of all forms of PT was lower in Logan, significantly so in terms of Shuttle bus use. Nevertheless, non-usage dropped somewhat since 2022.
- ❖ *More frequent service* was most likely to be the ‘most important’ initiative to Logan residents, while *security measures* follows closely. *Appealing fare structure* was significantly less likely to be a ‘most important’ initiative while *better parking* was more likely.

IPSWICH

- ❖ Ipswich residents exhibit Public Transport usage levels consistent with the state-wide average. Train and Shared car usage was slightly higher, while Bus usage was significantly lower. Similarly, Tram/light rail and Shuttle bus usage was lower here. Nevertheless, non-usage dropped somewhat since 2022.
- ❖ *Fare structure* was most likely to be the ‘most important’ initiative to Ipswich residents, while *service frequency* follows closely. *Frequent hygiene*, *better parking* and *multi-trip discounts* were relatively more likely to be a ‘most important’ initiative.

TOOWOOMBA

- ❖ Toowoomba residents exhibit Public Transport usage levels significantly lower than the state-wide average. Bus, Train, Ferry and Tram/light rail usage were significantly lower, while Shared car and Shuttle bus usage was consistent. Nevertheless, non-usage dropped somewhat since 2022.
- ❖ *Fare structure* and *frequent hygiene* were most likely to be the ‘most important’ initiatives to Toowoomba residents, while *direct services* follows closely. *Contactless payments* were significantly less likely to be cited, while feeling that ‘none of these’ are important was relatively higher.

CAIRNS

- ❖ Cairns residents exhibit Public Transport usage levels consistent with the state-wide average. Only Train and Ferry usage were significantly lower, while Shuttle bus usage was slightly higher. Non-usage saw a significant drop since 2022, however weekly usage also declined.
- ❖ *Service frequency* and *security measures* were most likely to be the ‘most important’ initiatives to Cairns residents. *Fare structure* were significantly less likely to be cited nor ranked higher, while feeling that ‘none of these’ are important was relatively higher.

TOWNSVILLE

- ❖ Townsville residents exhibit Public Transport usage levels slightly lower than the state-wide average. Ferry and e-Scooter usage was somewhat higher while Train usage was significantly lower. Non-usage dropped somewhat since 2022.
- ❖ *Frequent hygiene* was considered important amongst over half of Townsville residents, while significantly more than the QLD average considered *security measures* a ‘most important’ PT initiative.

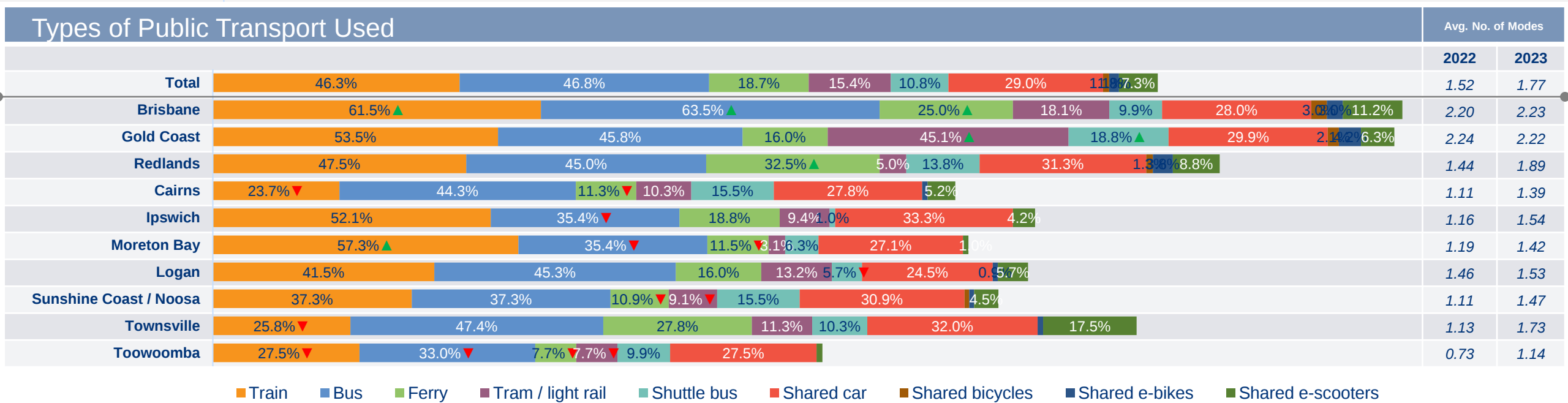
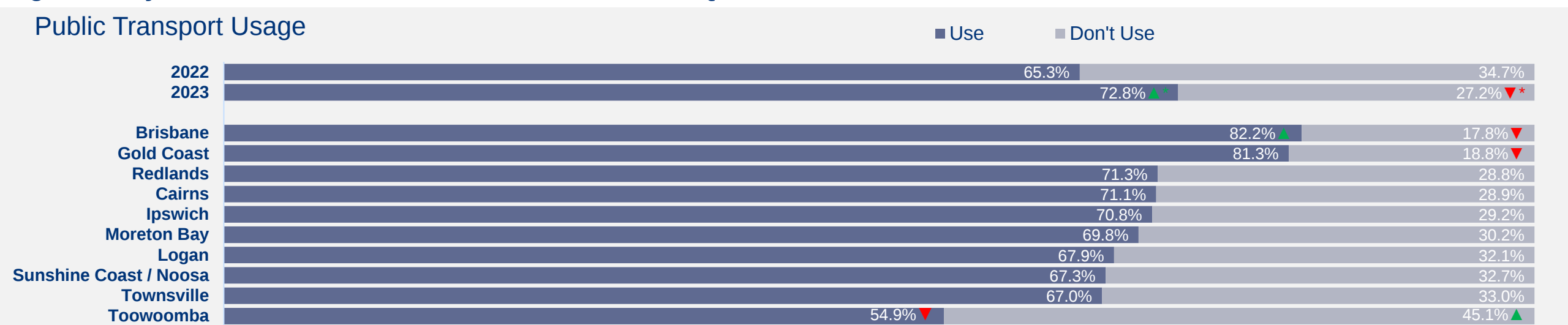




Overall Results

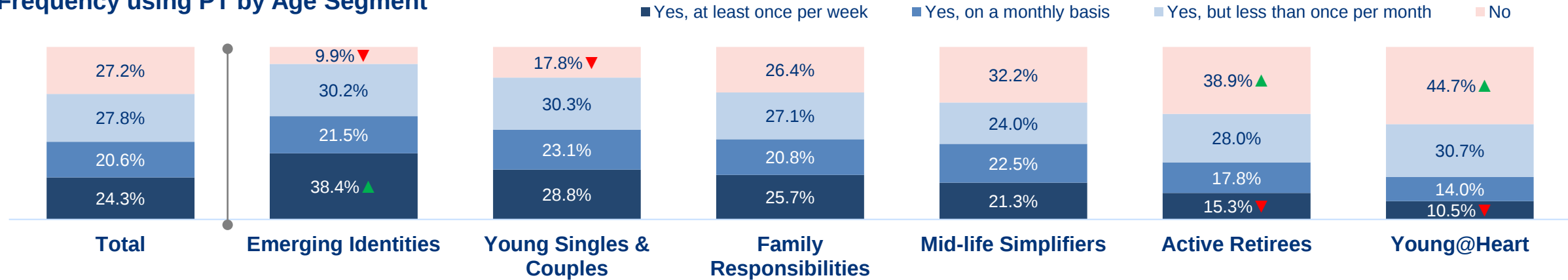
Overall PT usage significantly increased since 2022. Brisbane and Gold Coast have the highest proportions of Public Transport Users; 4 out of 5 in these locales, typically use 2 or more PT types. PT usage was significantly lower in Toowoomba relative to the rest of QLD.

Locations

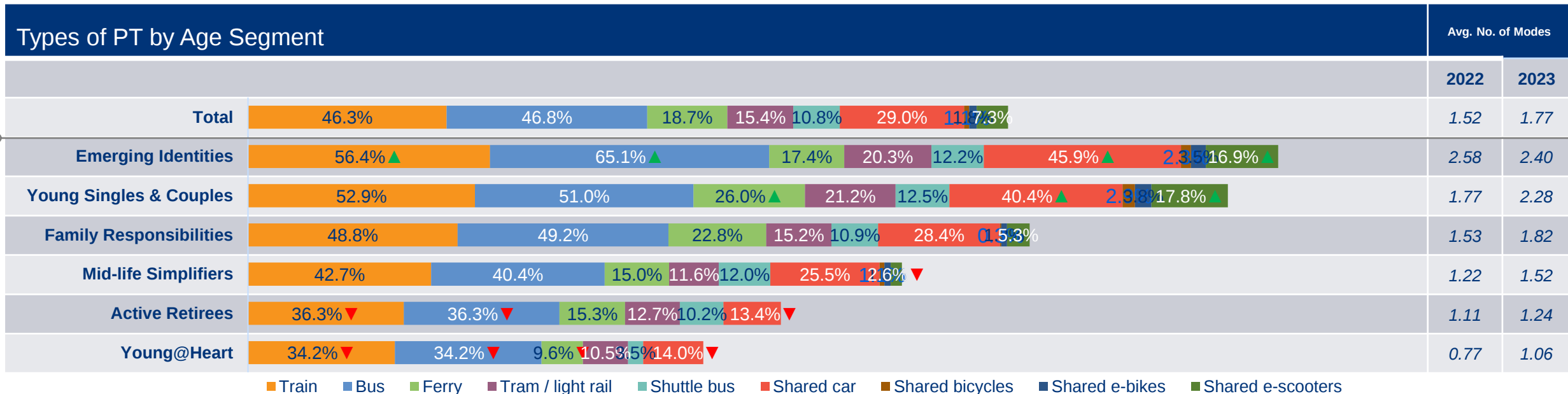


Weekly usage of PT decreases with age, while monthly usage remains fairly consistent until retirement age. Similarly, the average number of PT modes utilised decreases with age, with Emerging Identities using the most (2.40) compared with Young@Heart (1.06).

Frequency using PT by Age Segment

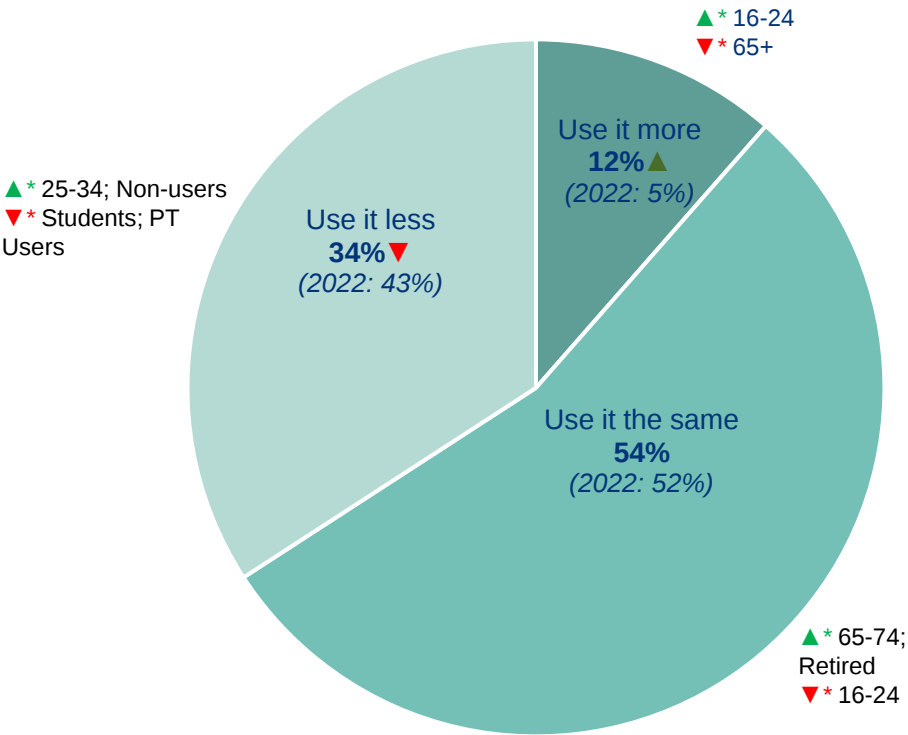


Types of PT by Age Segment

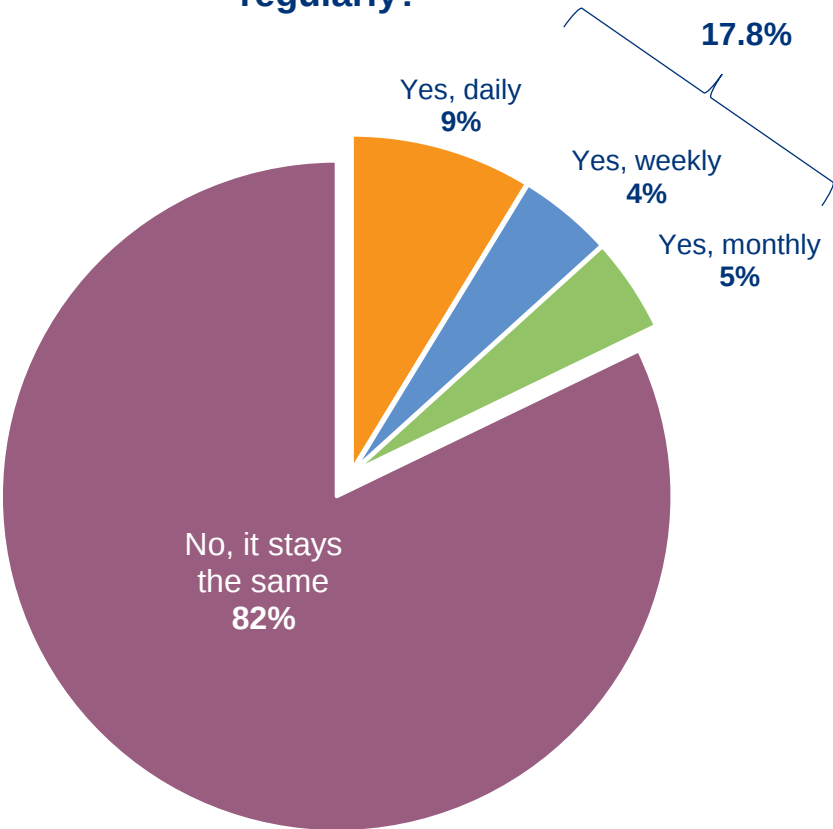


Overall, respondents indicated that they are using Public Transport more now than 12 months ago (12%, versus 5% in the year prior). Though over 80% of those employed or studying have a static place of work/study, 9% report it changing on a daily basis.

Would you say your use of public transport has changed in the past 12 months?



Does your place of work or study change regularly?*



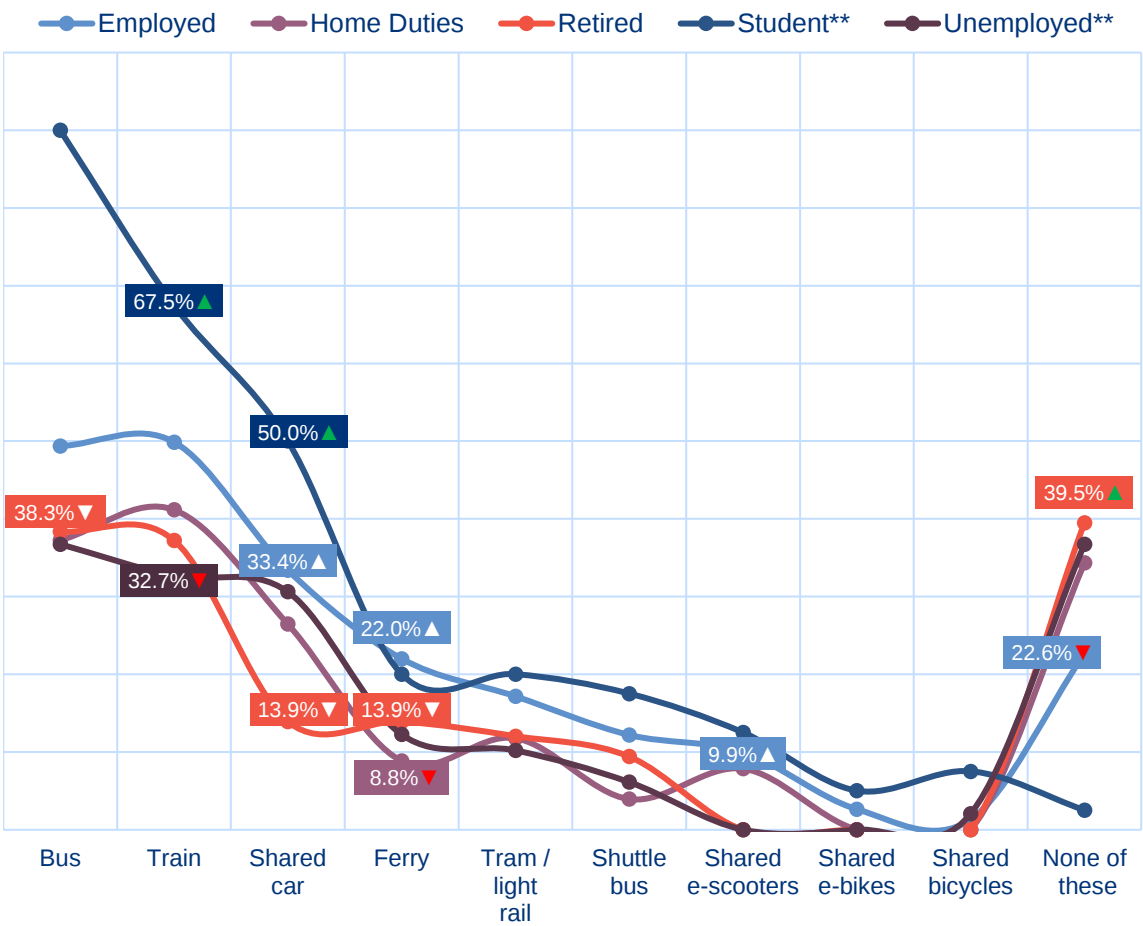
Source: Public Transport Survey 2023. Total n=1221 (2022 n=1295). Employed n=764; Home Duties n=102; Retired n=266; Student n=40; Unemployed n=49
Questions: Q2: Would you say your use of public transport has changed in the past 12 months?; *PT3_2: Does your place of work or study change regularly? S6. Which of these best describes your work status?
Note: *Introduced in 2023. ¹CAUTION: Small Base Size <50

▲ ▼ Significant difference at 95% confidence level, latest vs previous year.
*▲ *▼ Significant difference at 95% confidence level, group vs current year.

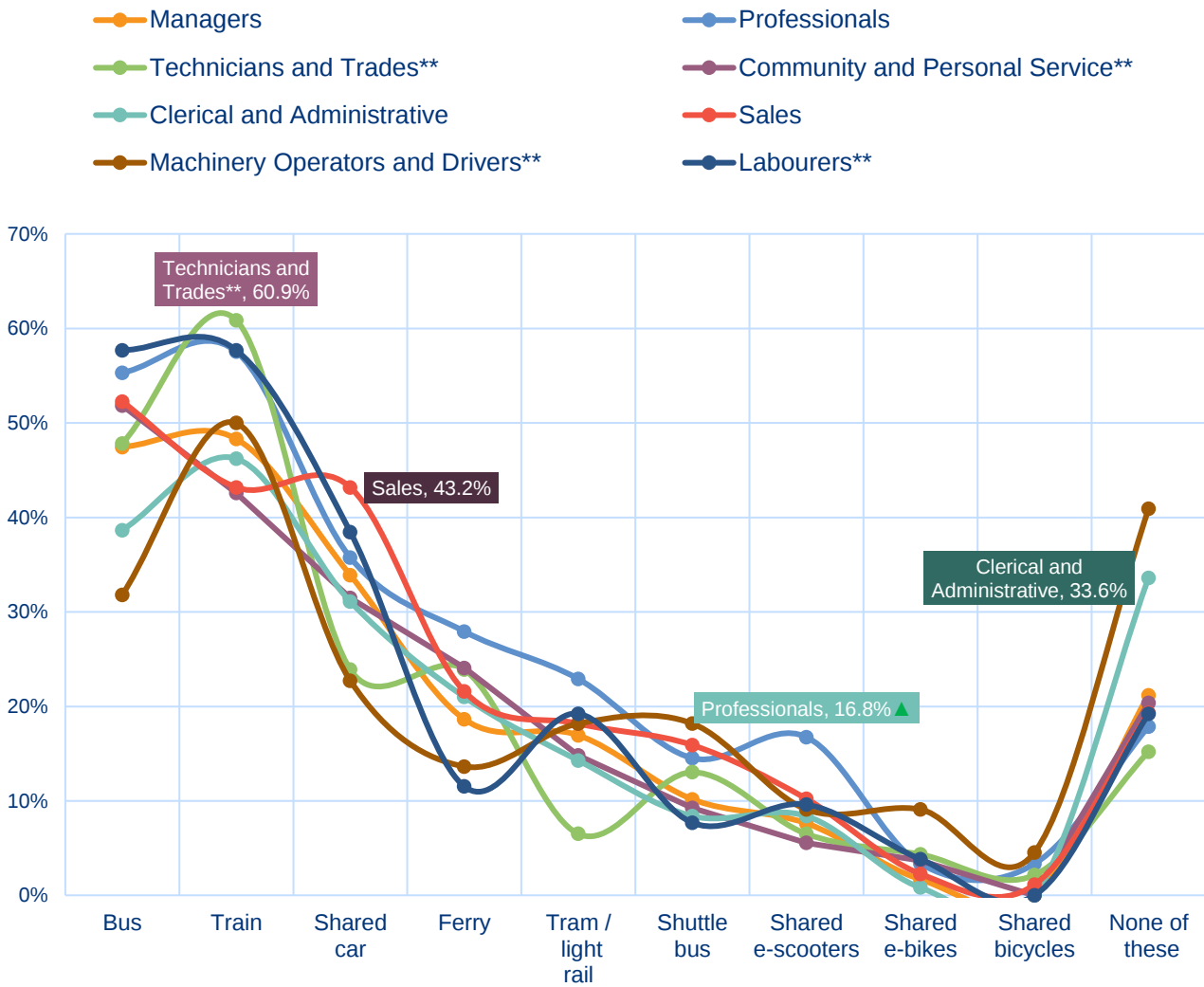
Students exhibited the highest rates of PT usage across the Work Statuses, significantly higher for Train and Shared Car transport. Employed Queenslanders exhibited significantly higher usage of Shared cars, Ferries and e-Scooters, while Retirees were significantly more likely to be Non-users.

Work Status

Types of Transport used - by Work Status



Types of Transport used - by Profession²



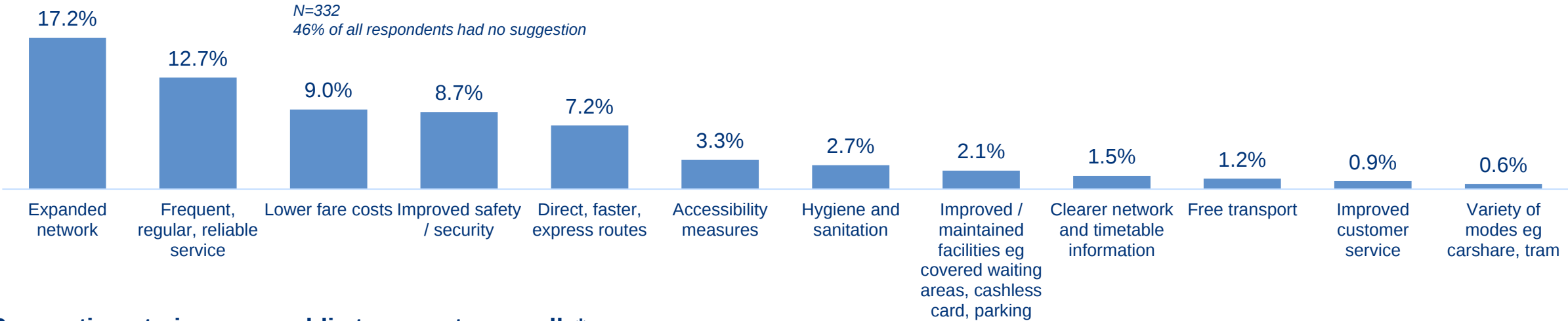
Source: Public Transport Survey 2023. Total n=1221 (2022 n=1295). Employed n=764; Home Duties n=102; Retired n=266; Student n=40; Unemployed n=49. (²Amongst those employed: Managers n=93; Professionals n=147; Technicians and Trades Workers n=39; Community and Personal Service Worker n=43; Clerical and Administrative Workers n=79; Sales Workers n=71; Machinery Operators and Drivers n=13; Labourers n=42; Other n=64.)
Questions: Q1: Please indicate if you have used any of these forms of public transport in the last 12 months; S6. Which of these best describes your work status? D1_2 Which of these classifications best describes your profession?

** CAUTION: Small Base Size <50

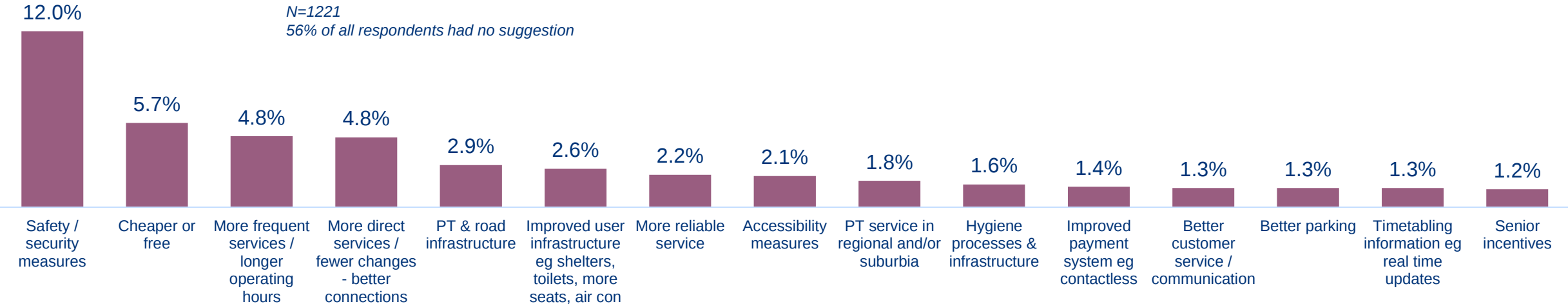
▲ ▼ Significant difference at 95% confidence level, group vs Total.

Expanded network connections alongside more frequent, reliable service were the top encouragements for Non-users. General improvement suggestions saw over 10% mention improved safety and security measures while 1 in 20 believe PT should be made if not free then cheaper to access.

What would encourage Non-users to use public transport?



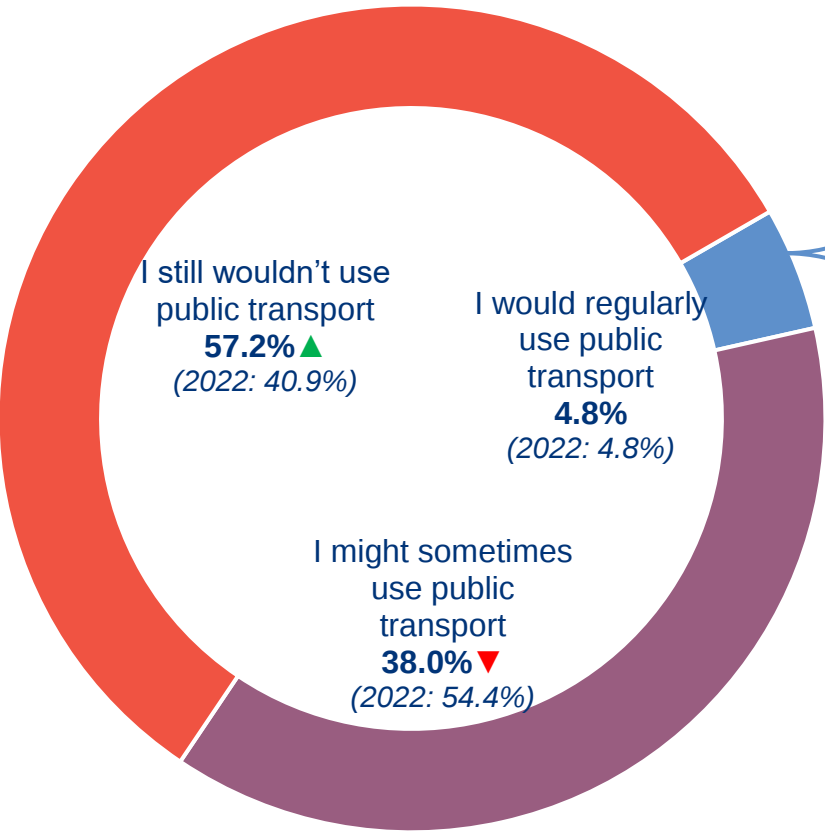
Suggestions to improve public transport generally*



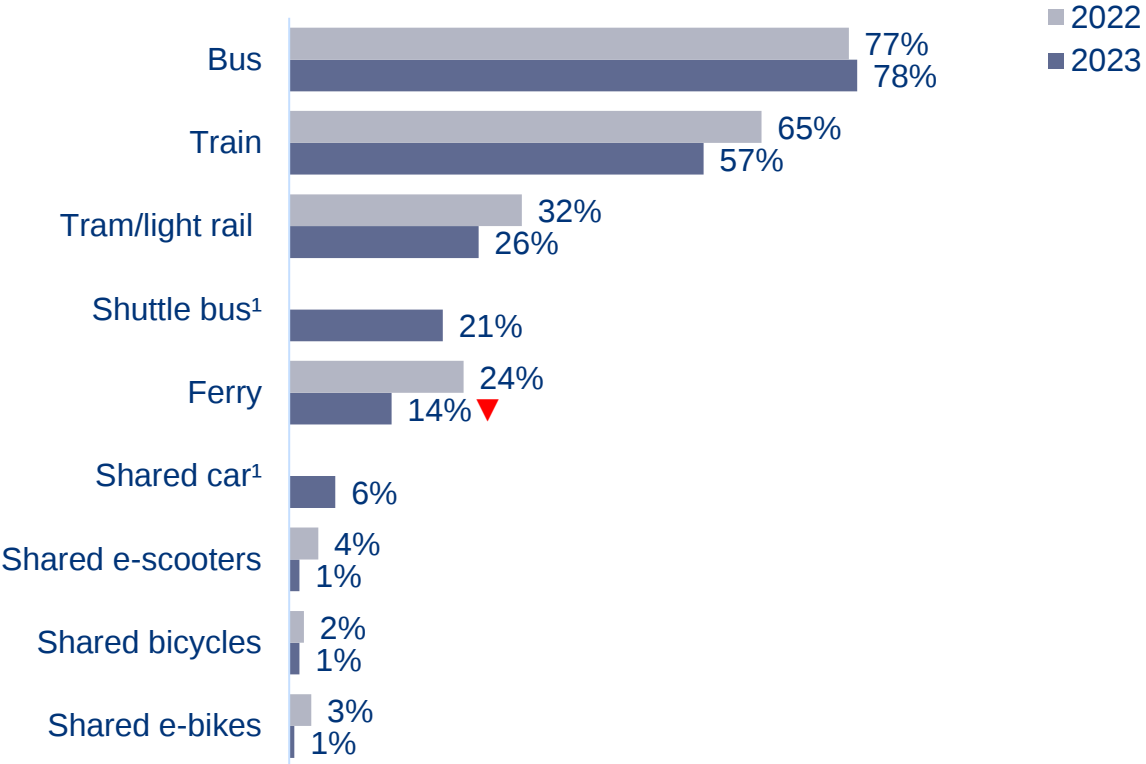
Source: Public Transport Survey 2023. Total n=1221.
Questions: NU6. Do you have any suggestions about improvements to public transport that would increase your likelihood of using it? PI6. Are there any other problems you would like us to be aware of or do you have any suggestions that would improve public transport generally?
Note: *Topics with fewer than 1% of mentions have not been presented here.

Only 2 in 5 of those who do NOT use Public Transport indicate that they might should their concerns be addressed; significantly lower than in 2022. Bus remains the mostly likely-to-be-considered option among the suggested modes of transport.

Amongst those who don't use PT, relative impact of having their concerns with PT on their likelihood to use PT

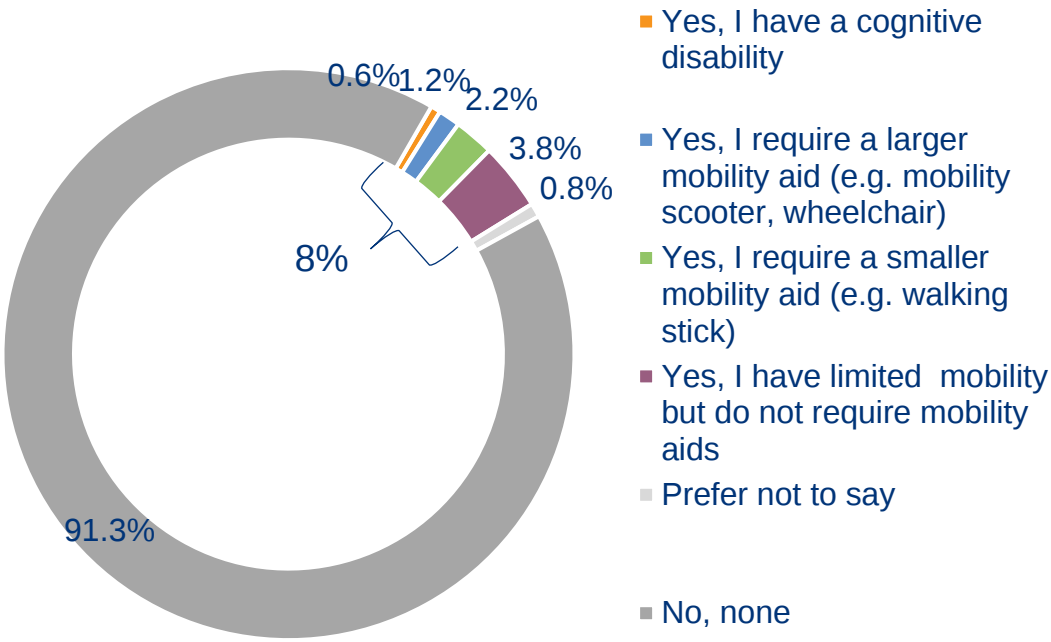


Among those who would consider public transport, which of the following modes?*

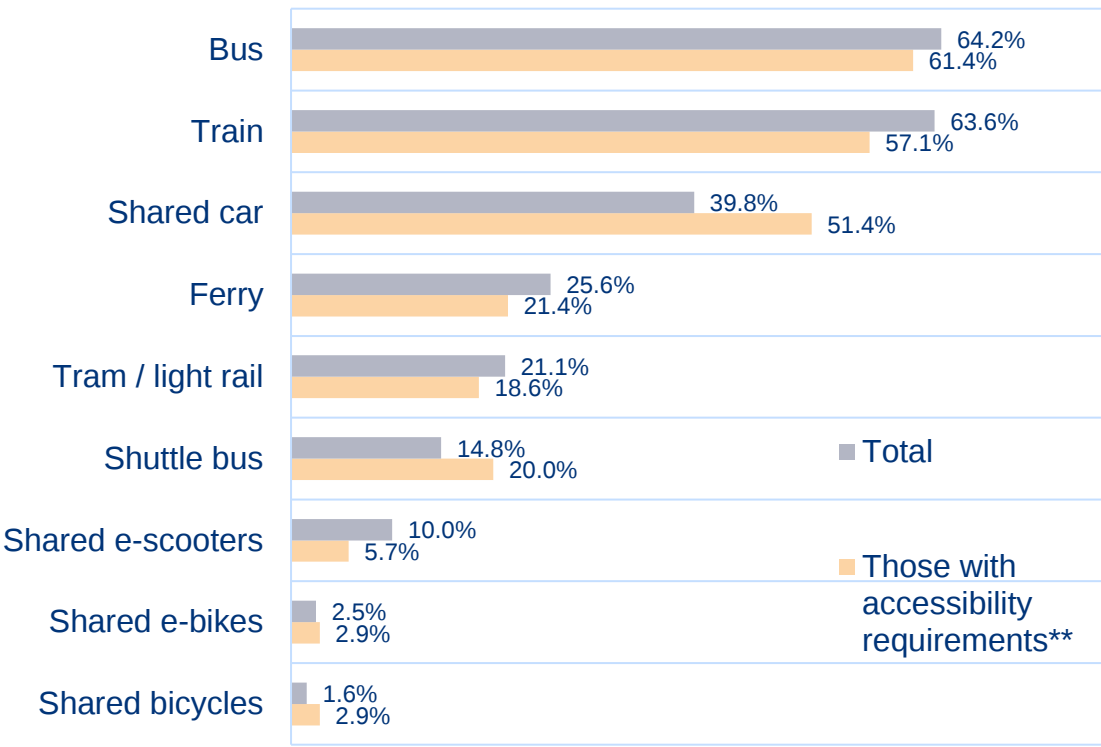


Consistent with last year’s results, 8% of PT Users have accessibility requirements. As such, initiatives and priorities for these users include Concessions, Accessibility Measures, Safety Measures, and Improved User Infrastructure (see next slide).

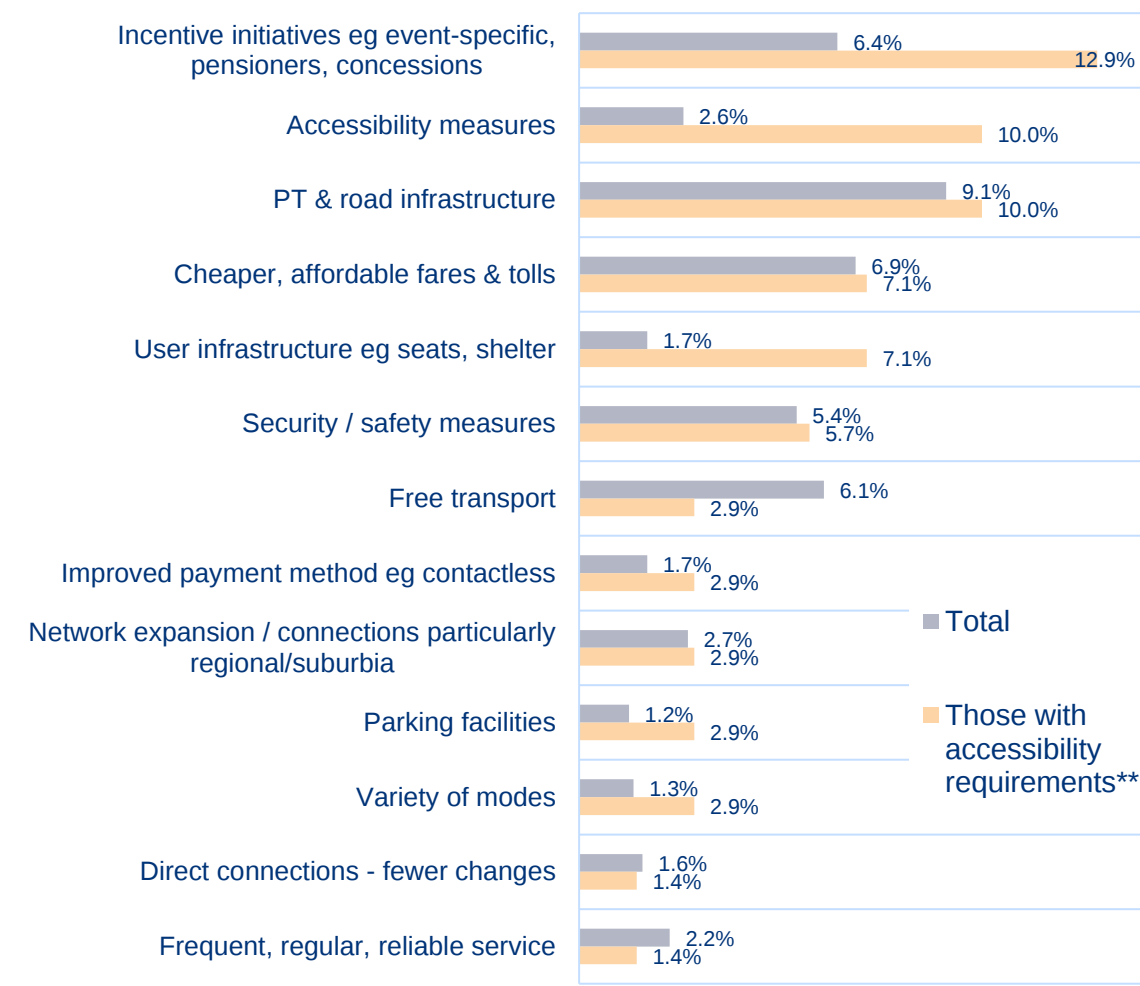
Accessibility requirements when using public transport?



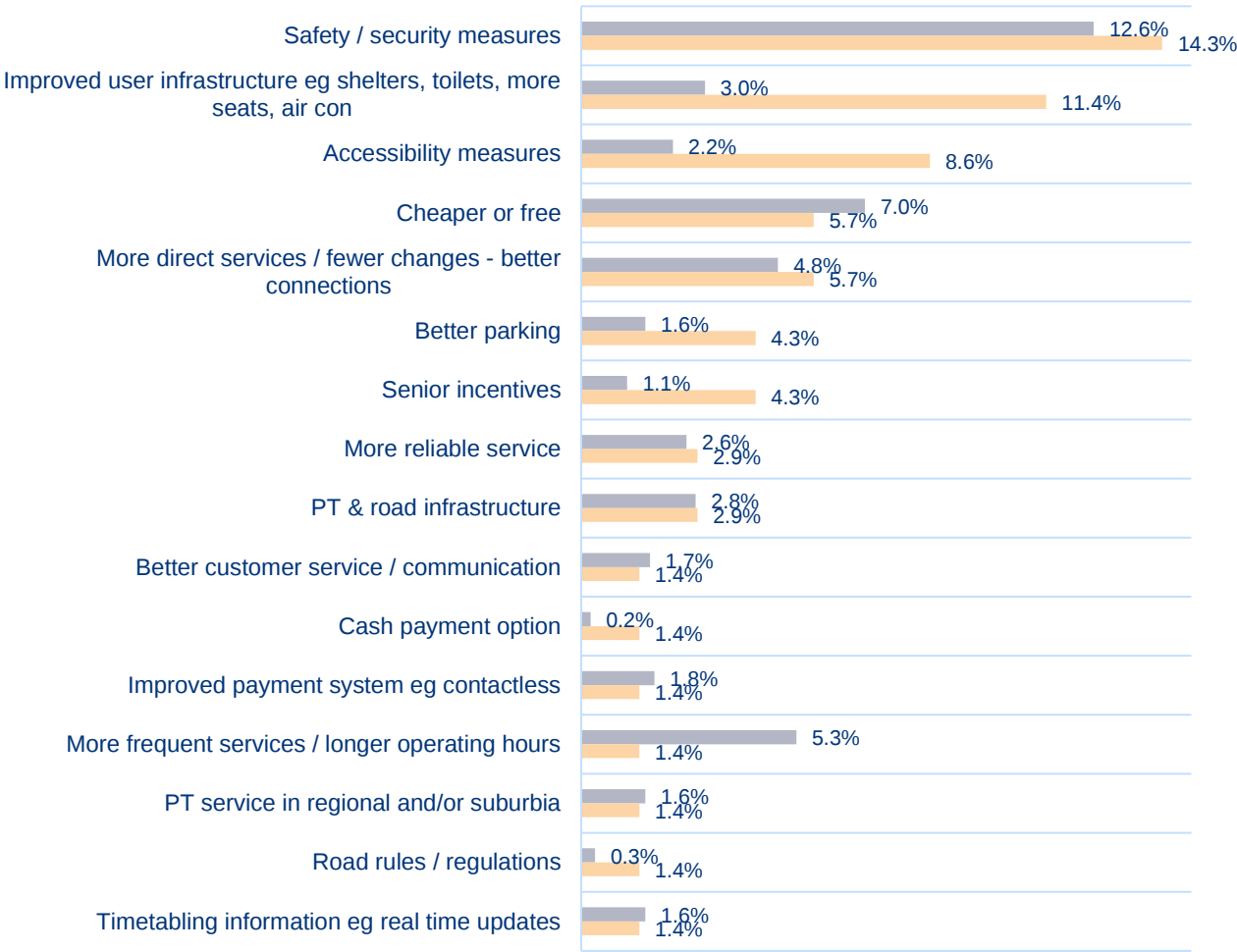
Types of Public Transport used



PT Initiatives RACQ Should Advocate for

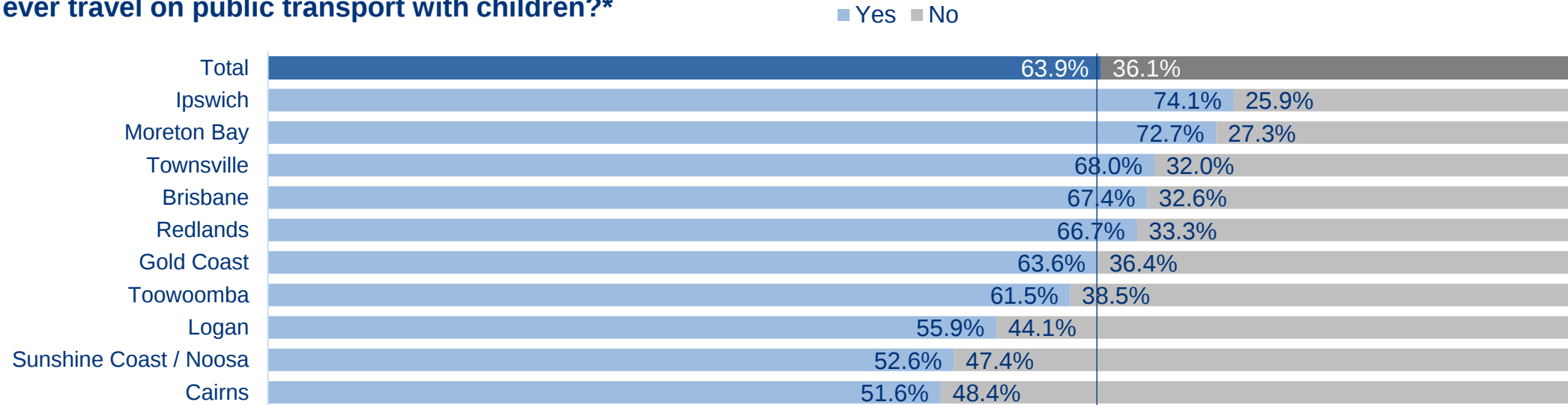


Suggestions to improve public transport generally

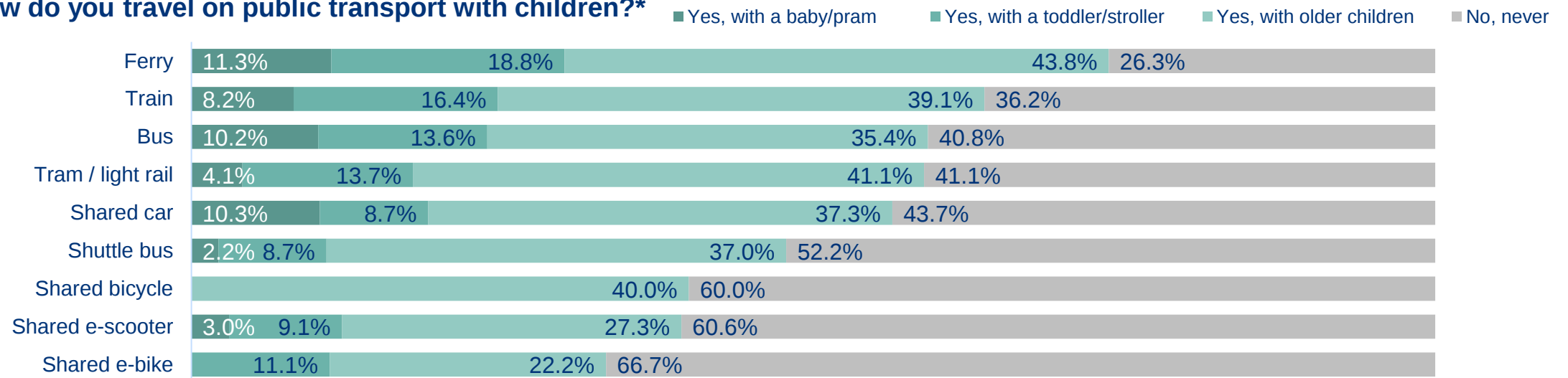


Amongst respondents with children at home, Ipswich and Moreton Bay were the locations with the highest rates of travelling with children. Travelling with children is common on ferries regardless of the child's age, however travelling with babies and/or toddlers on PT is less typical than with older children.

Do you ever travel on public transport with children?*

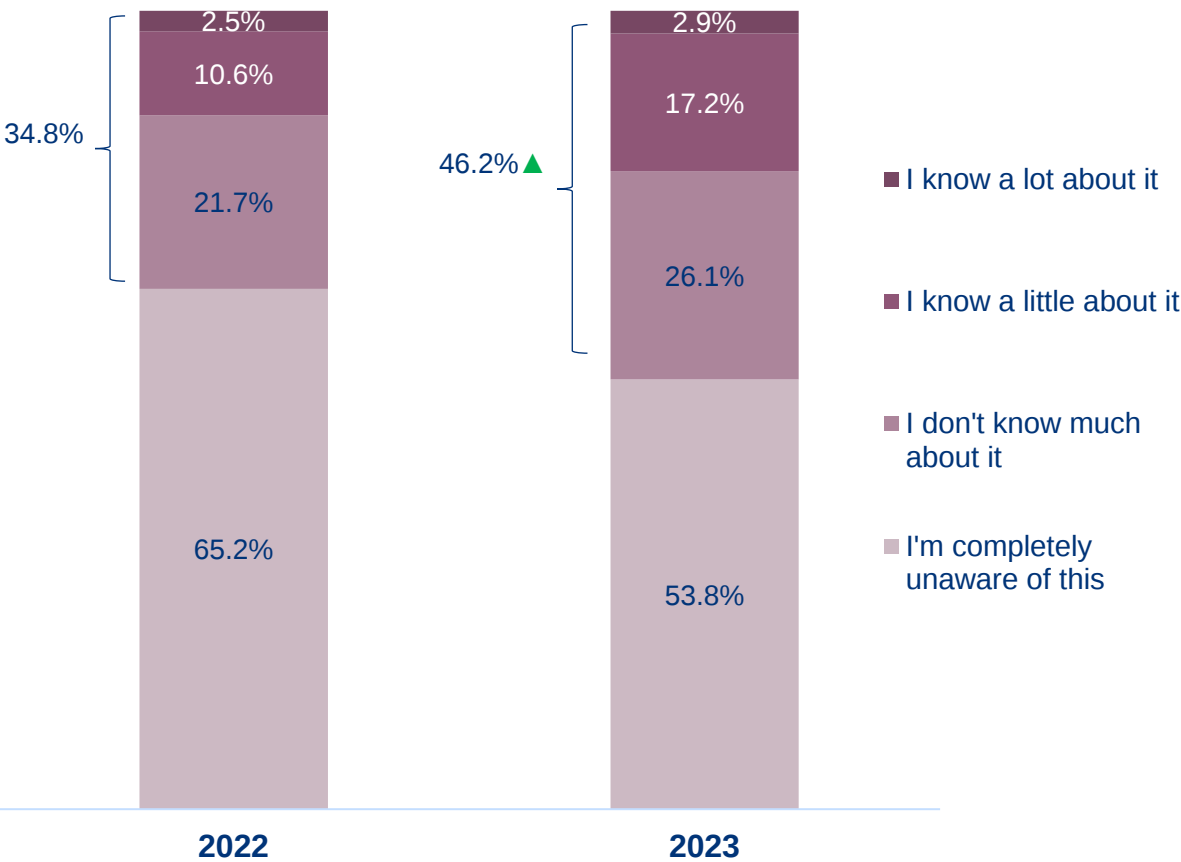


When and how do you travel on public transport with children?*

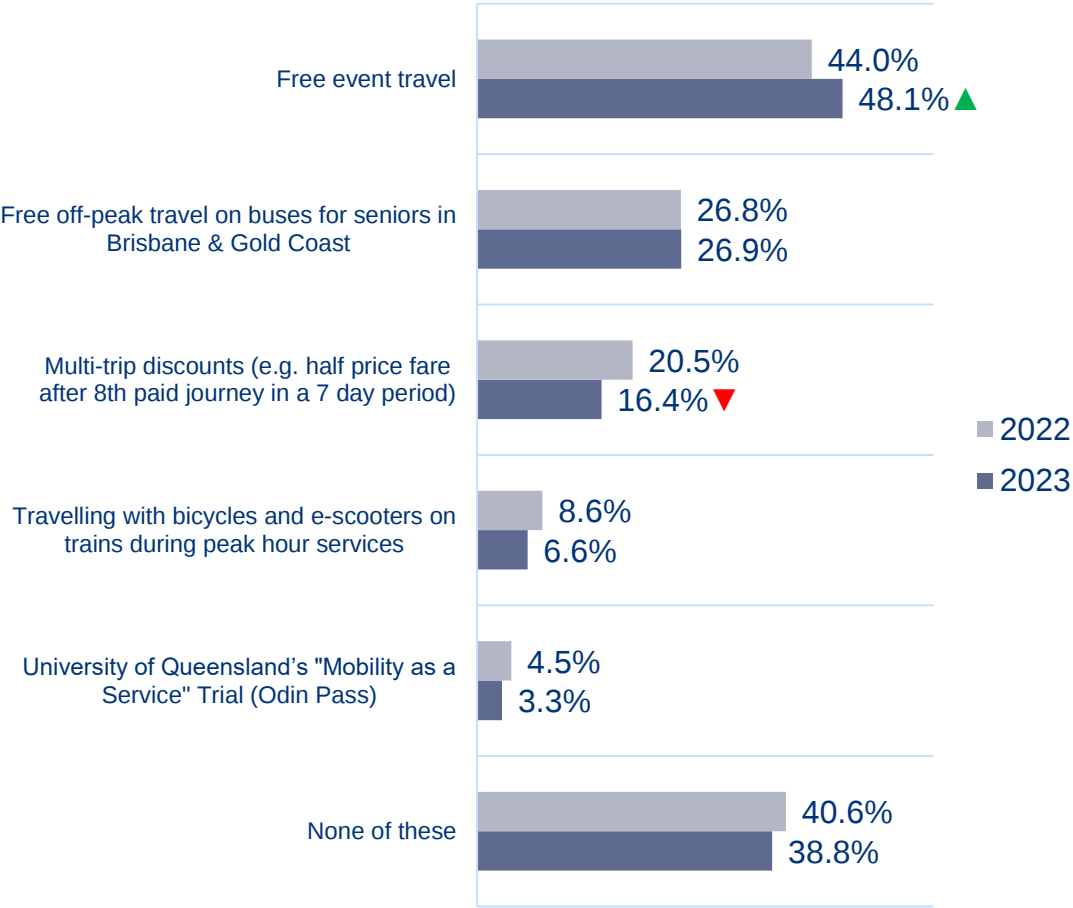


Net familiarity with RACQ’s advocacy role is seen to have significantly increased since last year. Awareness of free event travel also increased while awareness of multi-trip discount decreased significantly.

Familiarity with RACQ’s Advocacy Role



Awareness of Transport Initiatives



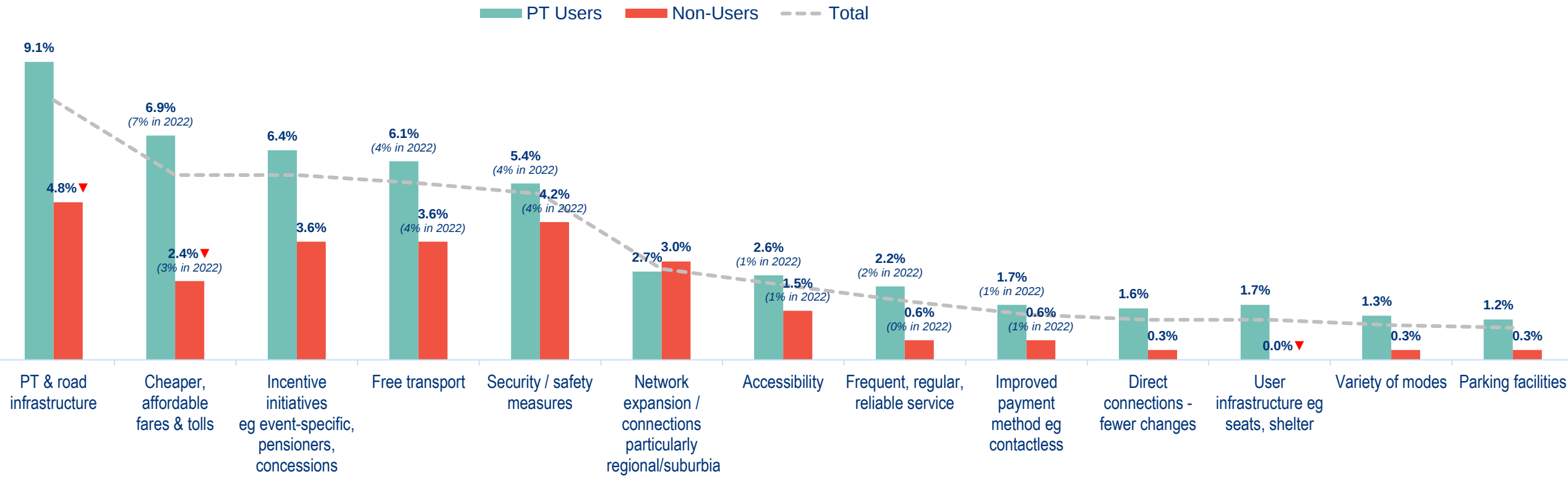
Source: Public Transport Survey 2023. Total n=1221 (2022 n=1295). PT User n=889, Non-User n=332.
Questions: PI3. How familiar are you with RACQ’s transport advocacy role? PI4. Have you heard of any of the following initiatives?

▲ ▼ Significant difference at 95% confidence level, latest vs previous year.

There was a notable increase in call for RACQ to advocate for Public Transport Initiatives with fewer respondents having no suggestions at all. Expanded PT and Road Infrastructure as well as more affordable fares emerged as top initiatives spontaneously mentioned by PT Users.

PT Initiatives RACQ Should Advocate for

N=1221
55% of all respondents had no suggestion (69% in 2022), 15% were unsure (3% in 2022)

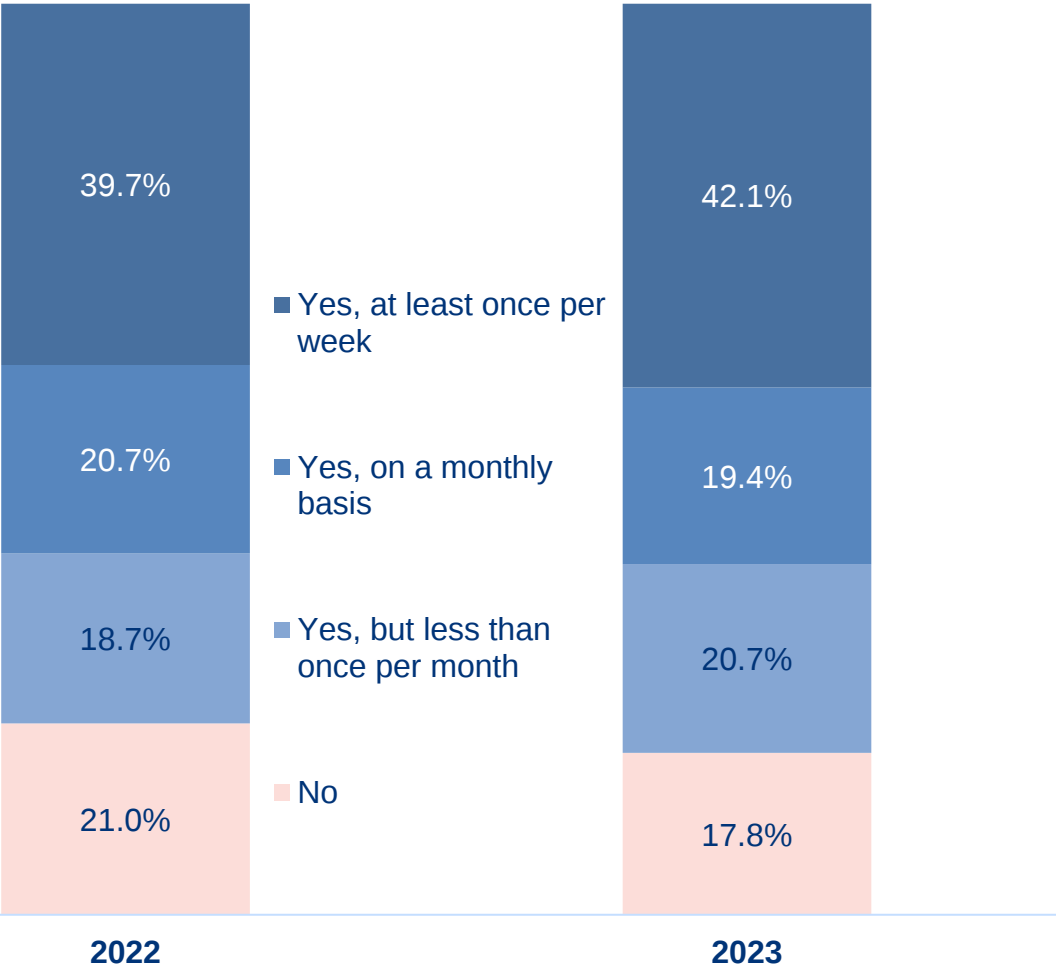


Brisbane

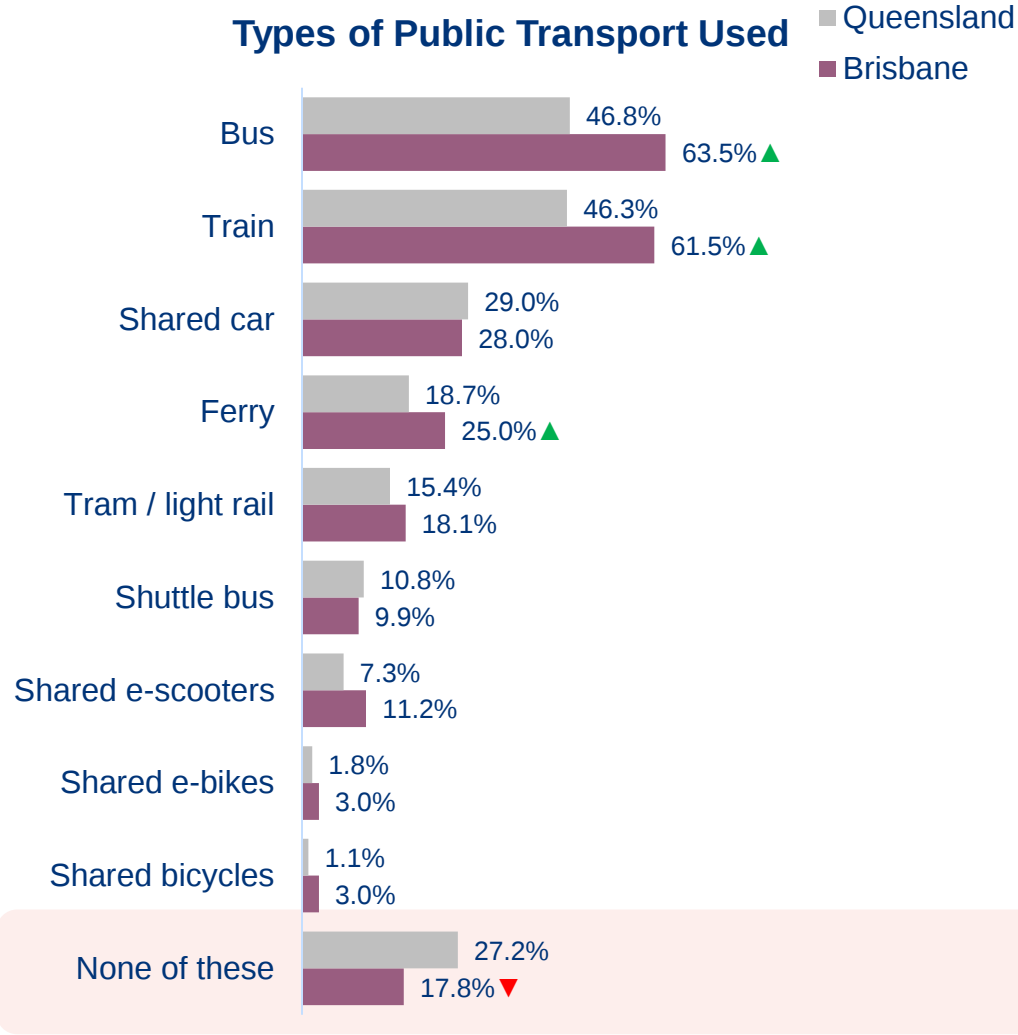
Public Transport User Profile

Brisbane residents continue to be significantly more likely to be Public Transport Users and to use PT on a weekly basis, compared with other locations in Queensland. Almost two thirds of Brisbane residents use buses or trains.

Do Brisbane Residents Use Public Transport?



Types of Public Transport Used

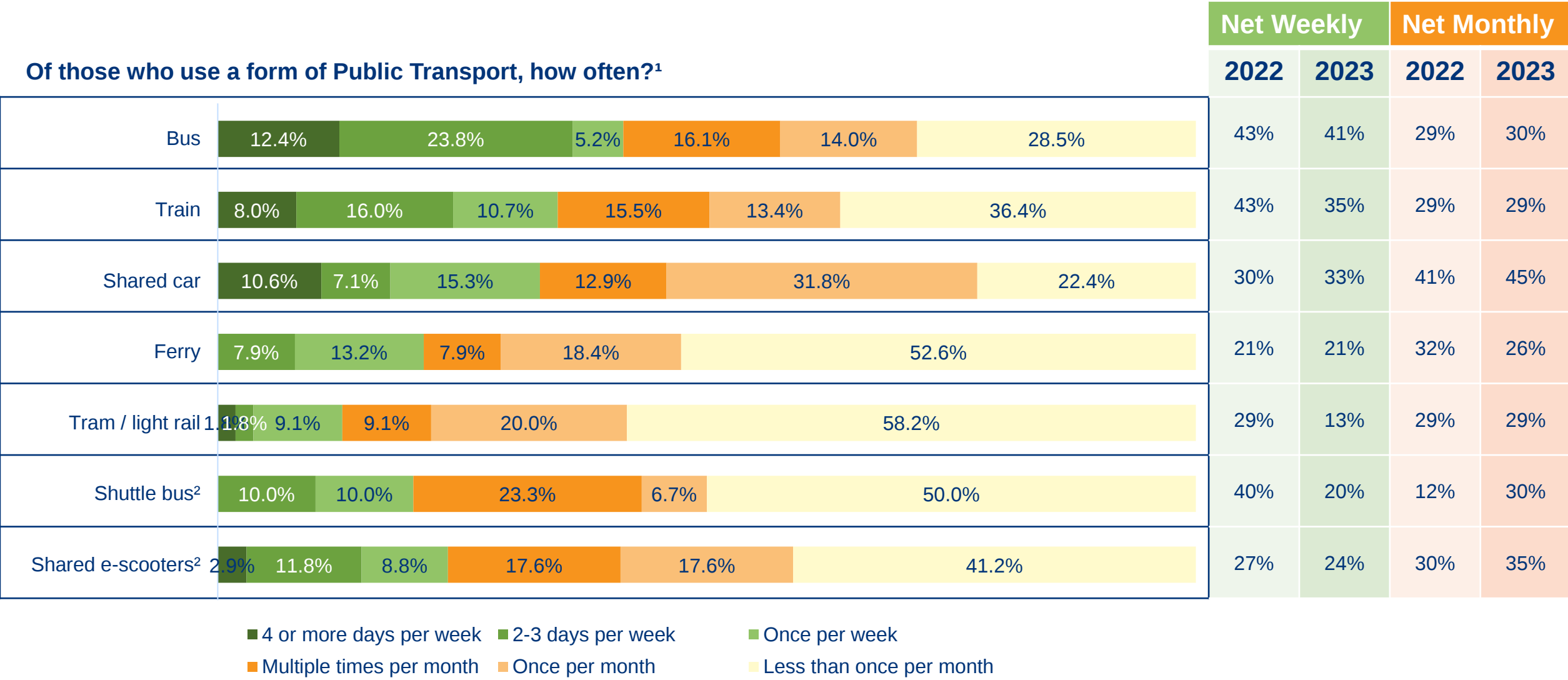


Source: Public Transport Survey 2023. Total n=1221. Brisbane residents n=304 (2022 Brisbane residents n=300)
Questions: Q1. Please indicate if you have used any of these forms of public transport at any time in the past 12 months. PT1. Please indicate how often you use these public transport options...

▲ ▼ Significant difference at 95% confidence level, Bne vs QLD.

In Brisbane, Bus and Train have the highest proportions of weekly users while Shared Cars are more typically used on a monthly basis. Over a half of Tram/light rail users in Brisbane use it less than once a month.

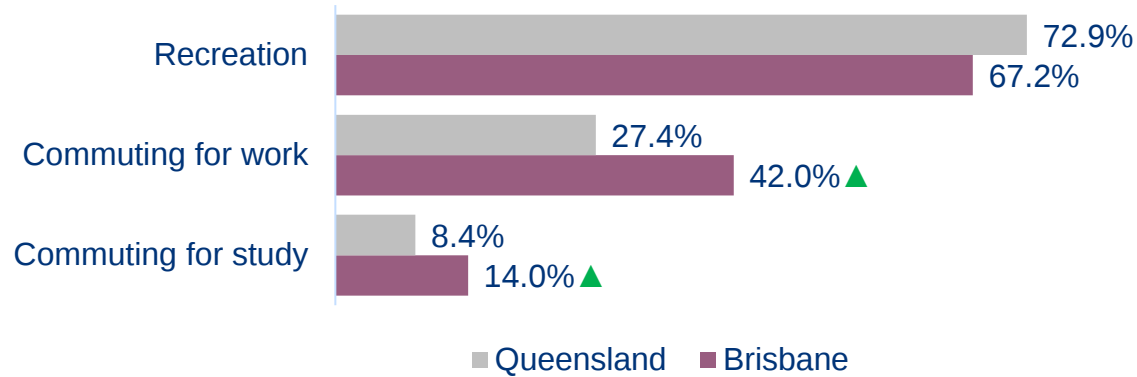
Brisbane



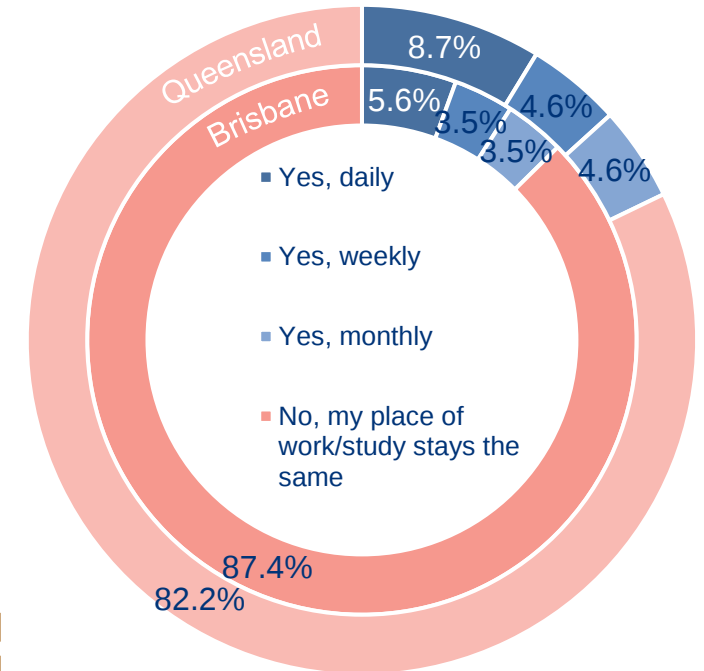
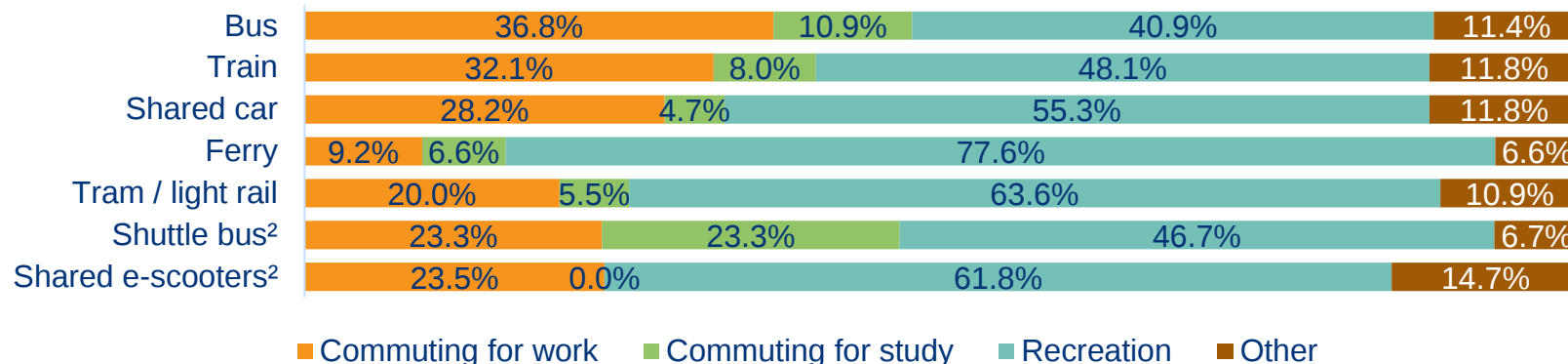
Of all the locations in Queensland surveyed, Brisbane had the highest proportion of PT Users who primarily use it for *commuting for work* as well as *commuting for study*. Bus and Train had the highest proportions of primary usage for *commuting for work*, while Ferries were primarily used for *Recreation* amongst 3 in 4 users. Likelihood of Places of Work/Study to Change amongst Brisbane residents was lower than Queensland overall.

Does Place of Work/Study Change regularly?*

Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹



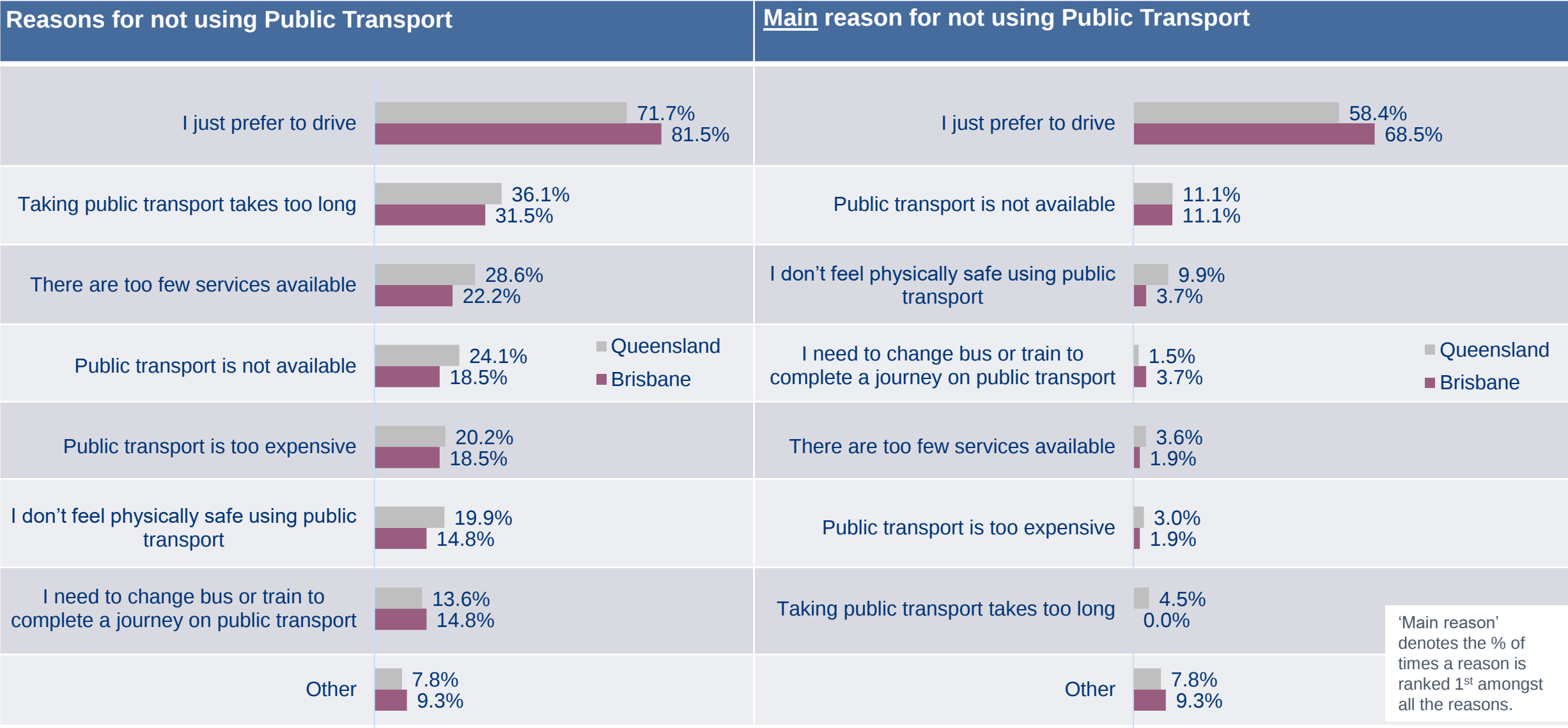
Source: Public Transport Survey 2023. Total n=1221. Brisbane PT users n=250 (Bus n=193; Train n=187, Shared car n=85; Ferry n=76; Tram/Light Rail n=55, Shuttle bus n=30, e-scooters n=34, e-bikes n=9, Bicycles n=9).

Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?

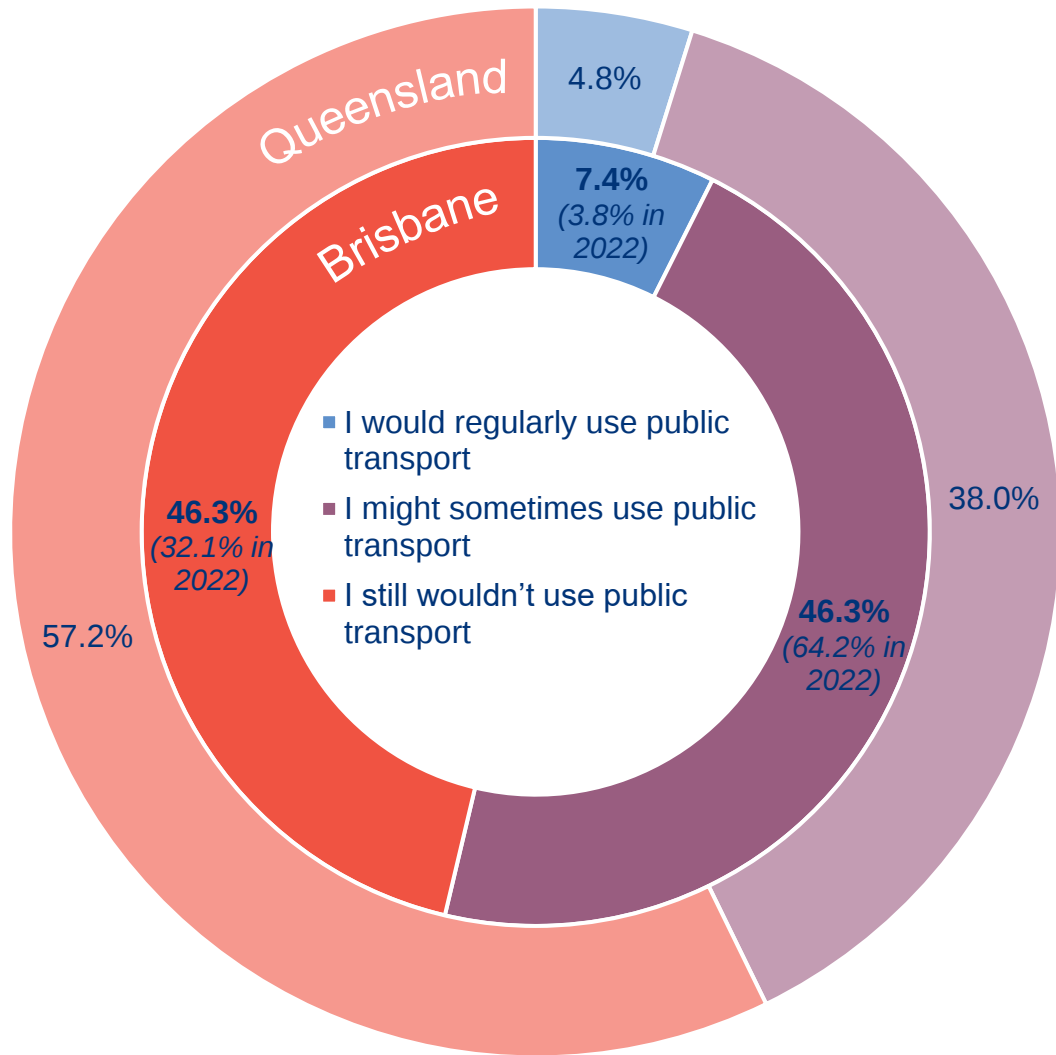
Note: *Asked of all residents who work or study; ¹Forms of transport with <10 responses are not presented here ²CAUTION: Small base size <50.

▲ ▼ Significant difference at 95% confidence level, Bne vs QLD.

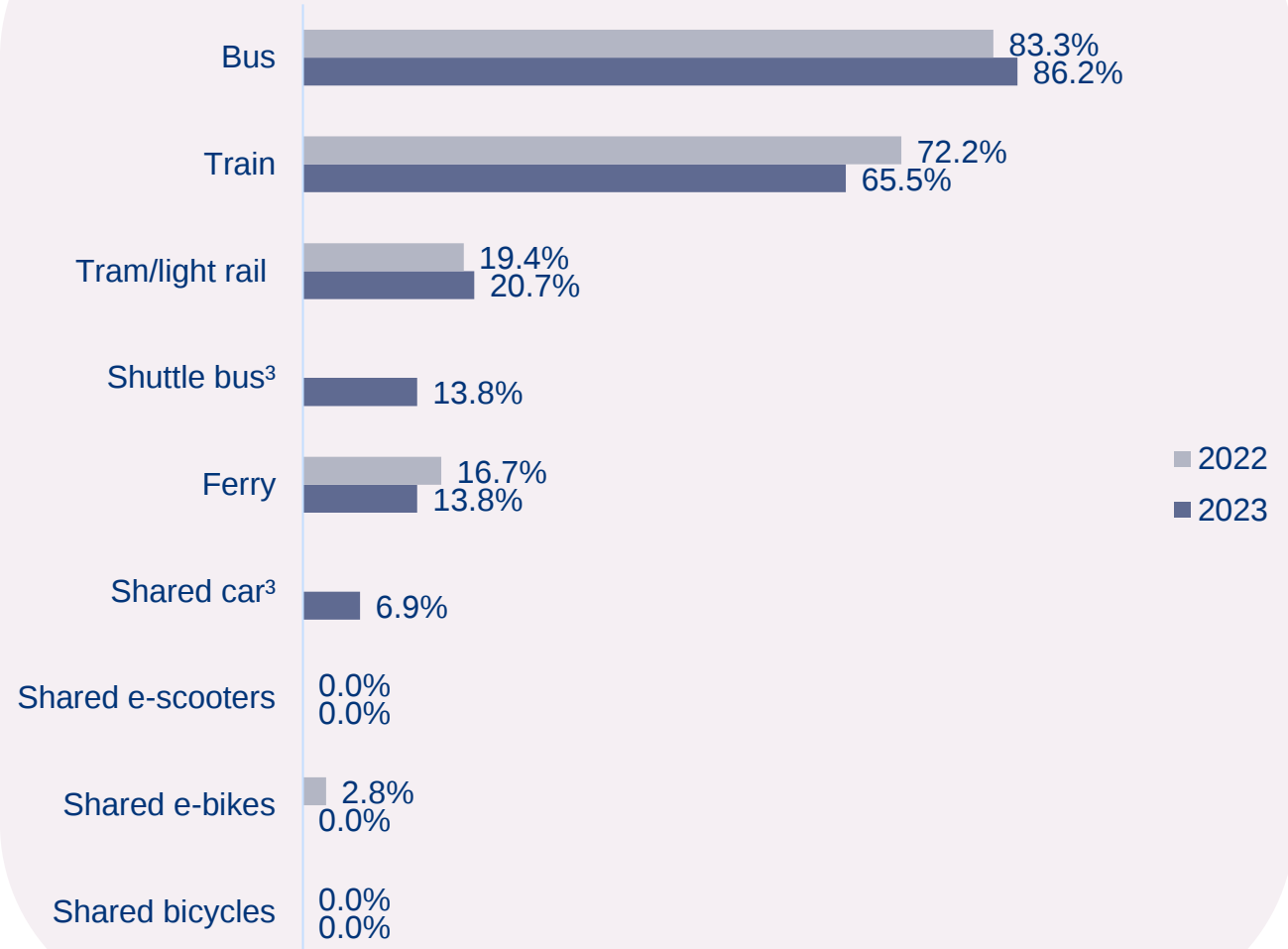
Preference to drive is both a common and main reason for Brisbane residents to not using Public Transport. Though cited among fewer than 1 in 5, amongst the remaining reasons for non-usage, *unavailability of Public Transport* emerged as the 2nd highest main reason.



Over half of Non-users in Brisbane would at least sometimes use Public Transport should their concerns be addressed, notably higher than the Queensland average.



Amongst those who would use public transport, modes that would be considered¹²



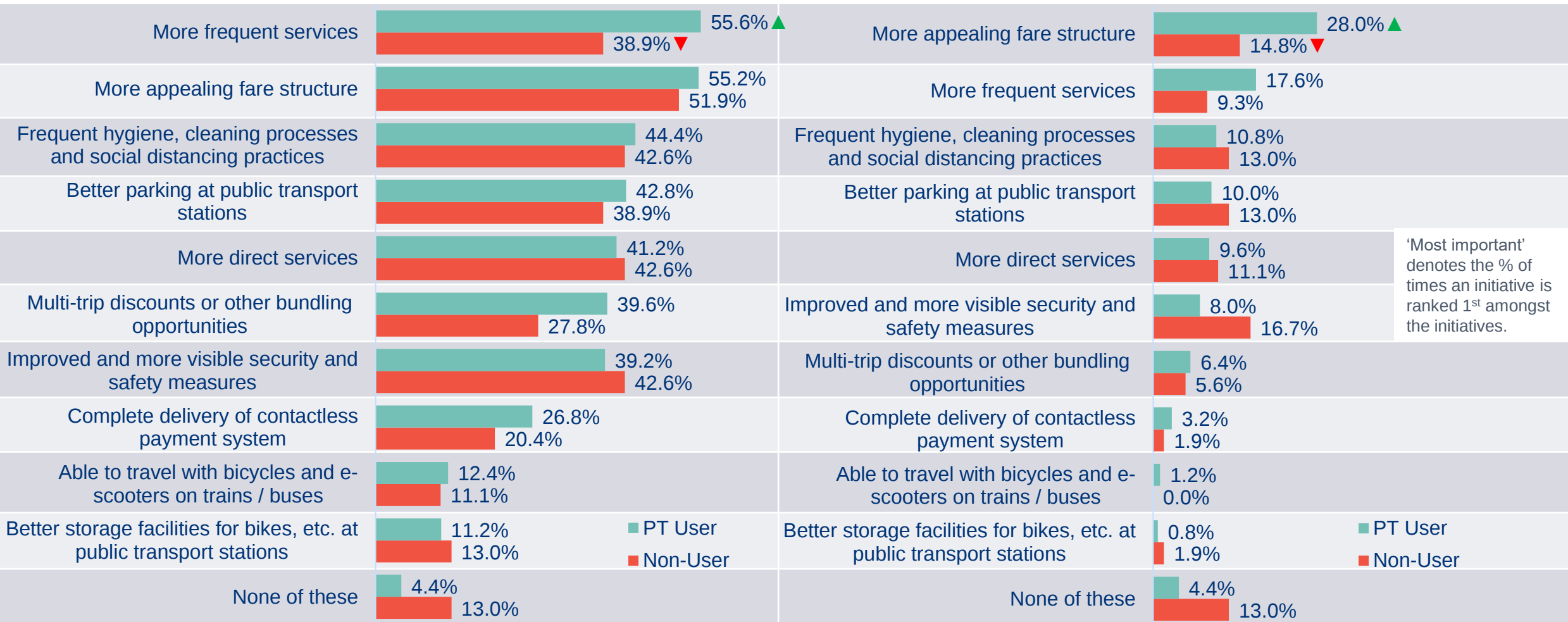
More appealing fare structure & More frequent services were selected by over half of Brisbane residents and were the top “most important” initiatives. Indeed, *fare structure* was significantly more often a “most important” reason for Brisbane residents as compared to Queensland overall. *Security and safety measures* were significantly less likely to be a “most important” reason for Brisbane residents.

PT Initiatives Important to Brisbane Residents			PT Initiatives <u>Most</u> Important* to Brisbane Residents		
More appealing fare structure	52.7% 54.6%		More appealing fare structure	20.3% 25.7%▲	
More frequent services	50.3% 52.6%		More frequent services	15.5% 16.1%	
More direct services	45.0% 41.4%		More direct services	11.4% 9.9%	
Frequent hygiene, cleaning processes and social distancing practices	43.0% 44.1%		Frequent hygiene, cleaning processes and social distancing practices	9.2% 11.2%	
Better parking at public transport stations	41.7% 42.1%		Better parking at public transport stations	8.8% 10.5%	'Most important' denotes the % of times an initiative is ranked 1 st amongst the initiatives.
Improved and more visible security and safety measures	40.2% 39.8%		Improved and more visible security and safety measures	14.1% 9.5%▼	
Multi-trip discounts or other bundling opportunities	32.2% 37.5%		Multi-trip discounts or other bundling opportunities	4.5% 6.3%	
Complete delivery of contactless payment system	24.4% 25.7%		Complete delivery of contactless payment system	3.4% 3.0%	
Able to travel with bicycles and e-scooters on trains / buses	9.9% 12.2%		Able to travel with bicycles and e-scooters on trains / buses	1.4% 1.0%	
Better storage facilities for bikes, etc. at public transport stations	9.7% 11.5%	Queensland Brisbane	Better storage facilities for bikes, etc. at public transport stations	0.7% 1.0%	Queensland Brisbane
None of these	10.7% 5.9%▼		None of these	10.7% 5.9%▼	

Fare structure is of greater importance to PT Users in Brisbane, being significantly more likely to be a “most important” initiative for them. Hygiene, parking and security were the issues of relatively greater importance to non-users.

PT Initiatives Important to Brisbane Users vs Non

PT Initiatives Most Important to Brisbane Users vs Non



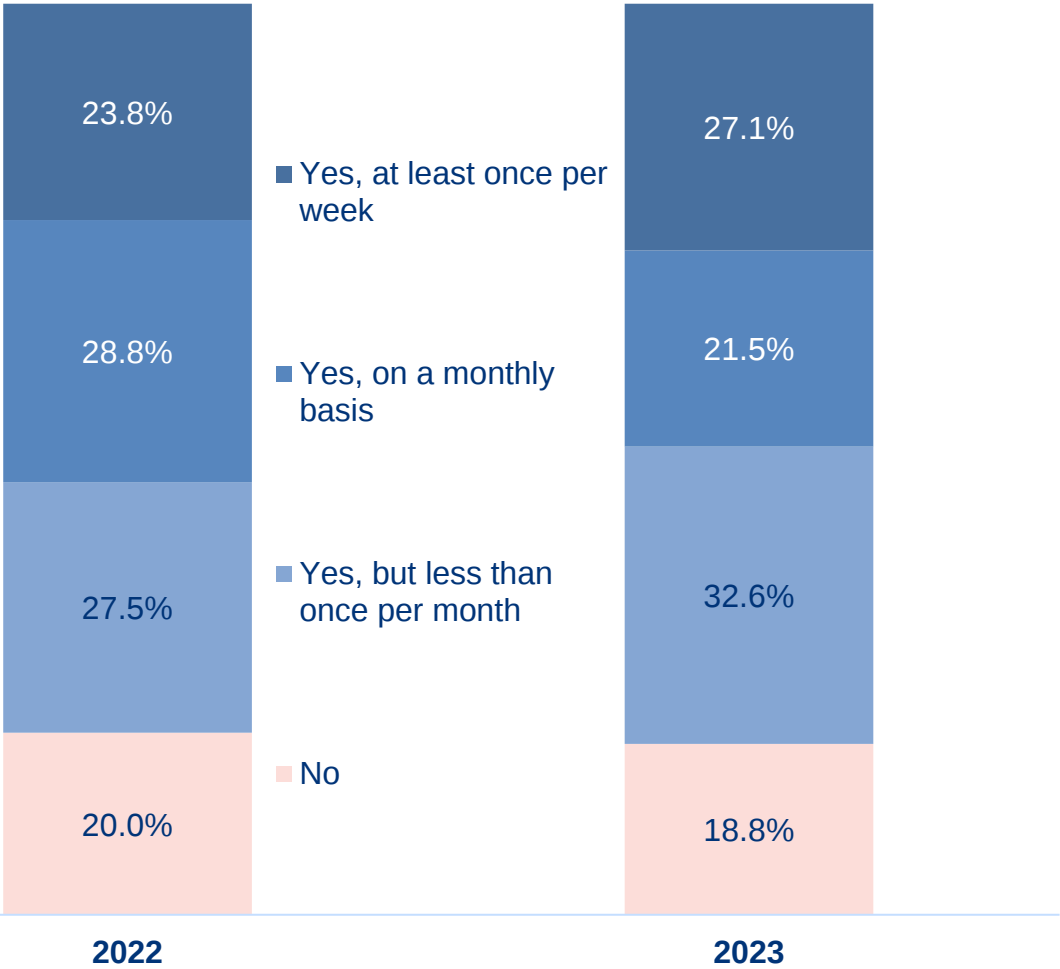
Source: Public Transport Survey 2023. Total n=1221. Brisbane residents m=304 (PT Users n=250, Non-users n=54)

25 Questions: P11. Please select which of these public transport initiatives are important to you? P12. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).

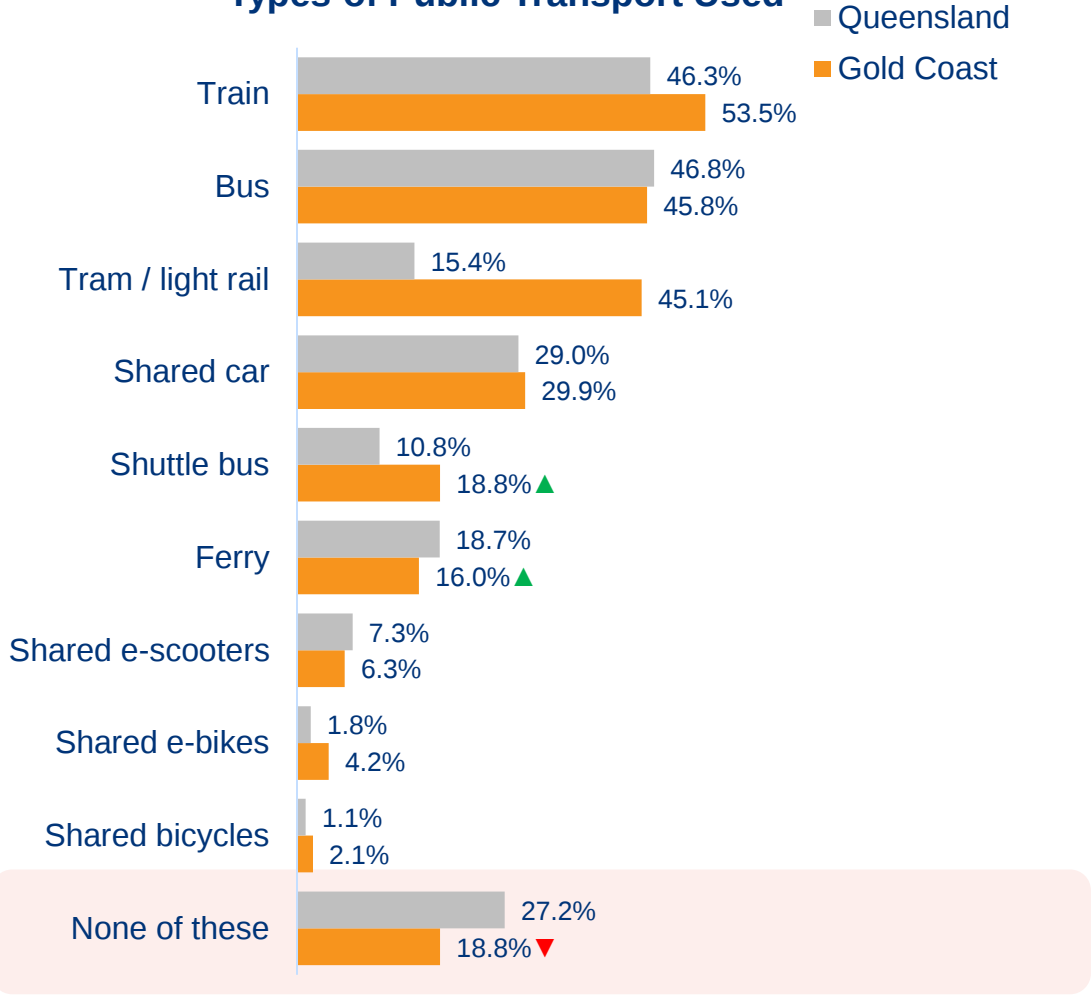
Gold Coast Public Transport User Profile

Gold Coast residents exhibit above average Public Transport Usage compared with other locations in Queensland. Tram/light-rail usage in Gold Coast is significantly above the rest of the state, as is Shuttle Bus usage. Non-usage dropped slightly since 2022 with upticks both in weekly and irregular PT Usage.

Do Gold Coast Residents Use Public Transport?



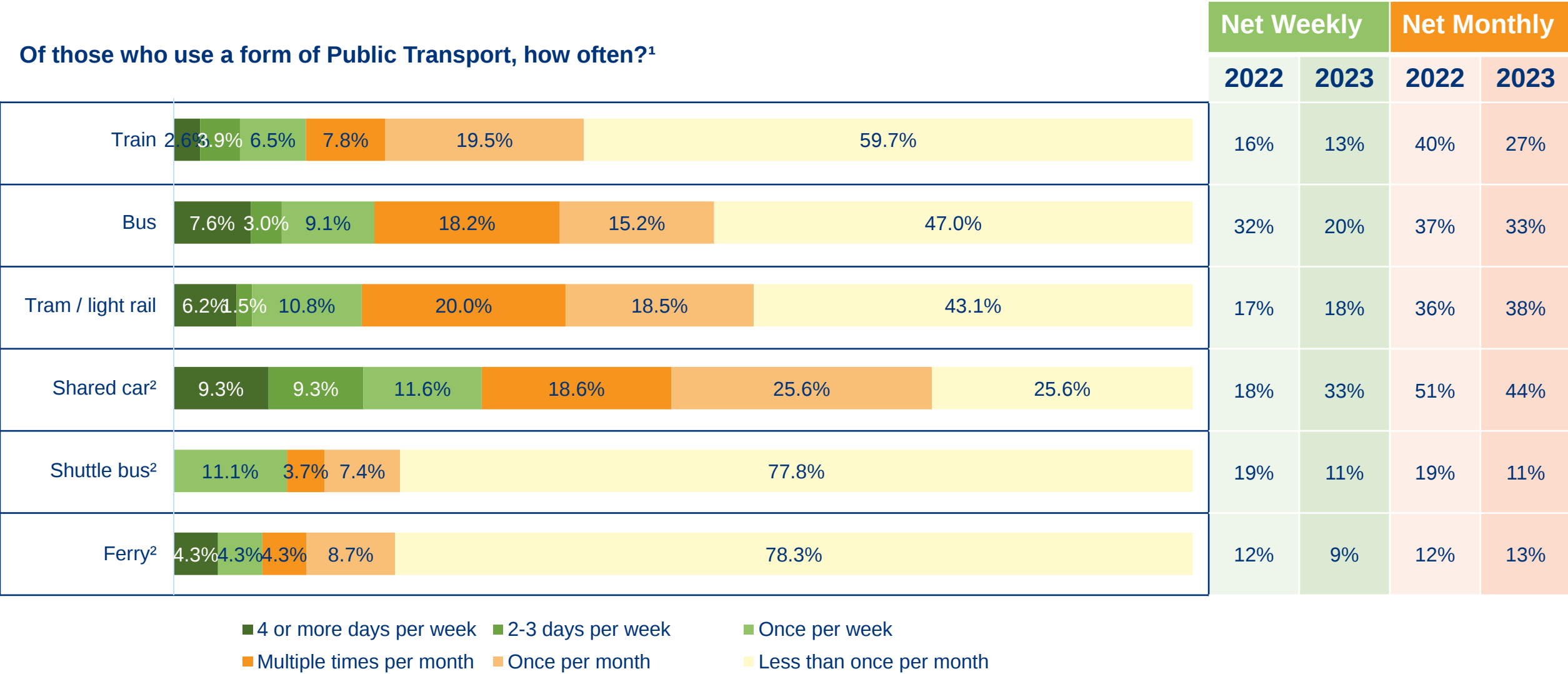
Types of Public Transport Used



In Gold Coast, Shared Car² and Bus have the highest proportions of weekly users. Less than 1 in 5 Tram/Light Rail Users use it on a weekly basis.

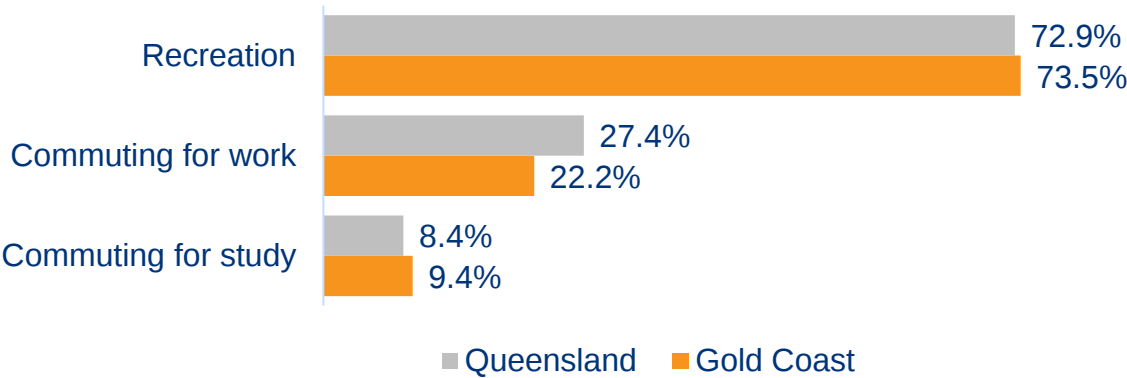
Gold Coast

Of those who use a form of Public Transport, how often?¹

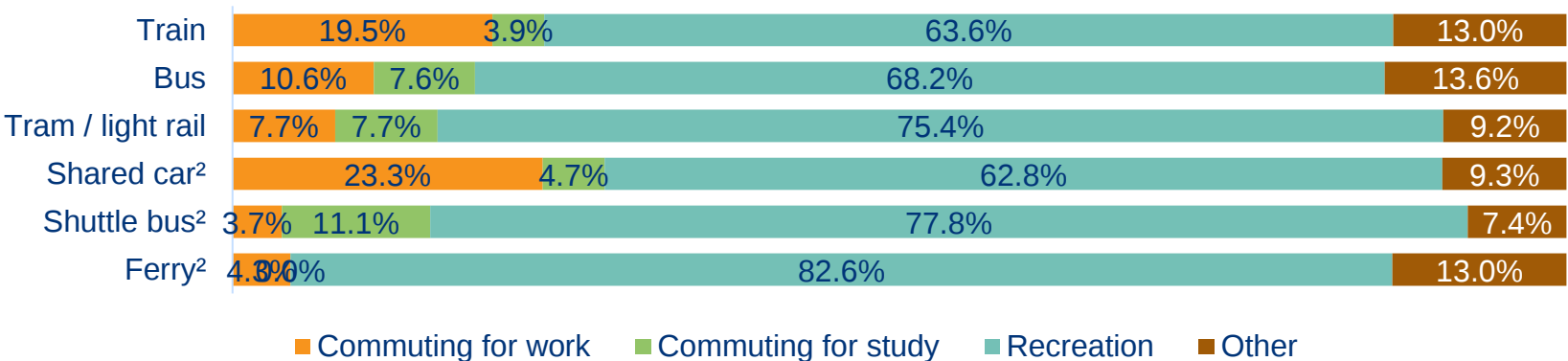


Purposes for using PT in Gold Coast are largely on par with the rest of Queensland, with slightly lower usage to *commute for work*, and slightly higher to *commute for study*. Shared car² and Train had the highest proportions of primary usage for *commuting for work*. Likelihood of Places of Work/Study to Change amongst Gold Coast residents was higher than Queensland overall.

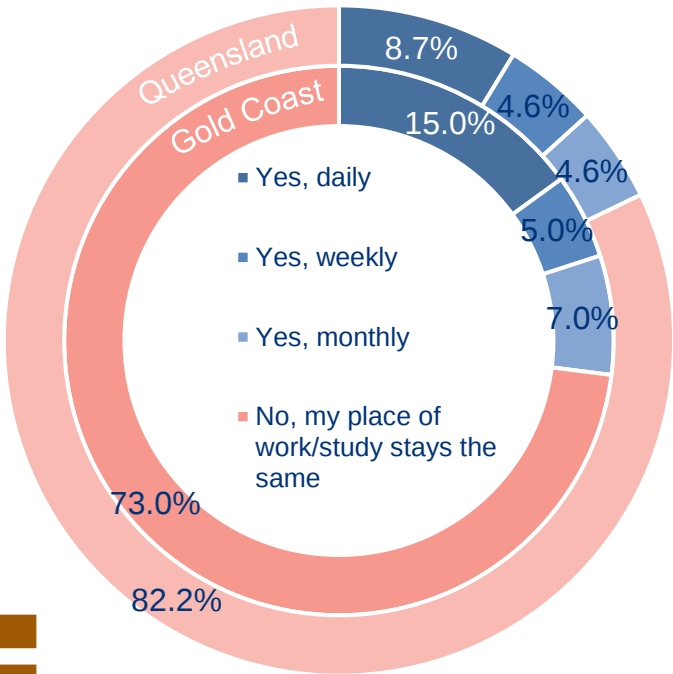
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹

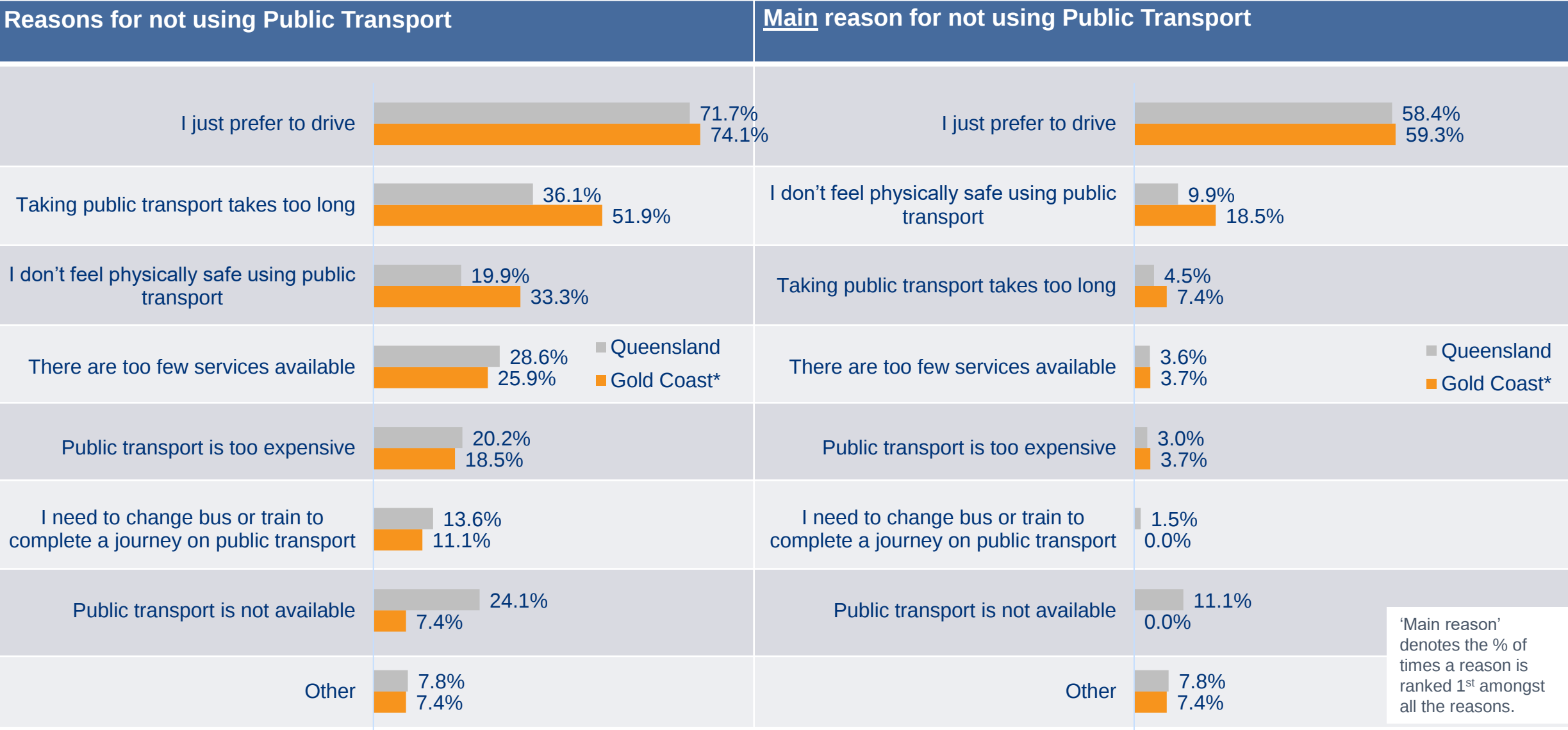


Place of Work/Study Change?*

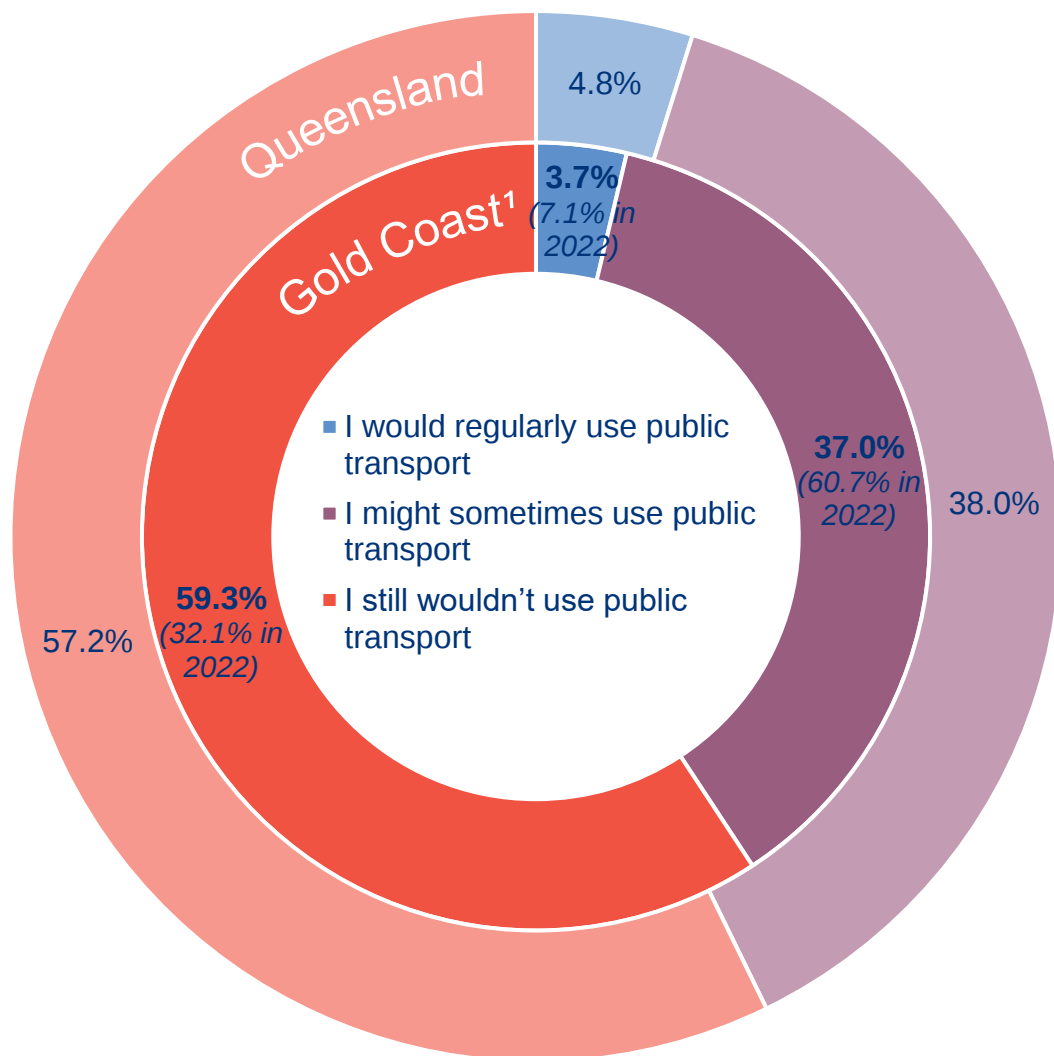


Source: Public Transport Survey 2023. Total n=1221. Gold Coast residents n=144; Gold Coast PT users n=117 (Bus n=66; Train n=77, Shared car n=43; Ferry n=23; Tram/Light Rail n=65, Shuttle bus n=27, e-scooters n=9, e-bikes n=6, Bicycles n=3).
Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?
Note: ¹Asked of all residents who work or study; ²Forms of transport with <10 responses are not presented here; ³CAUTION: Small base size <50.

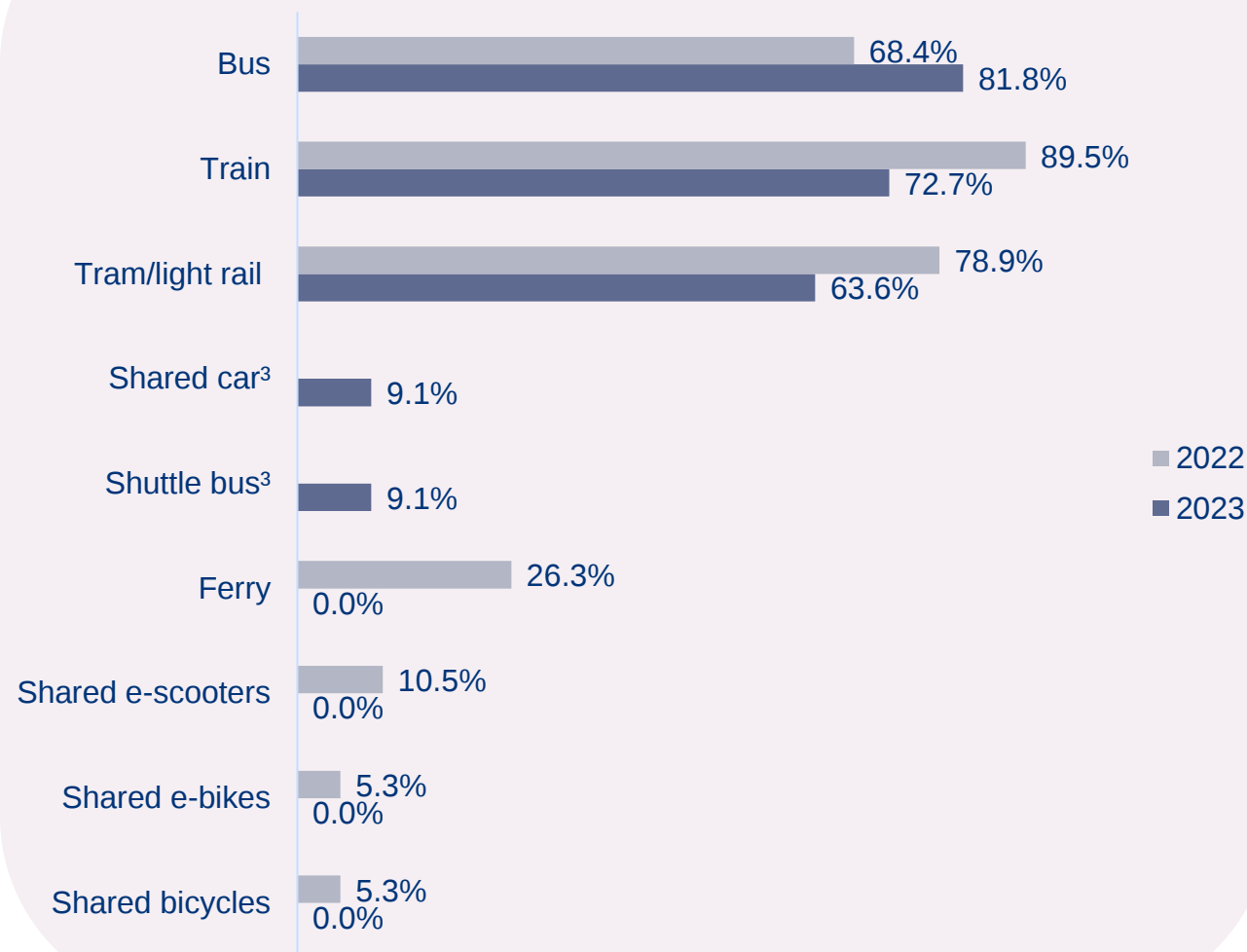
Preference to drive is both the most common and main reason for Gold Coast residents to not use Public Transport. Though cited among fewer than 1 in 5, amongst the remaining reasons for non-usage *physical safety of Public Transport* emerged as the 2nd highest main reason.



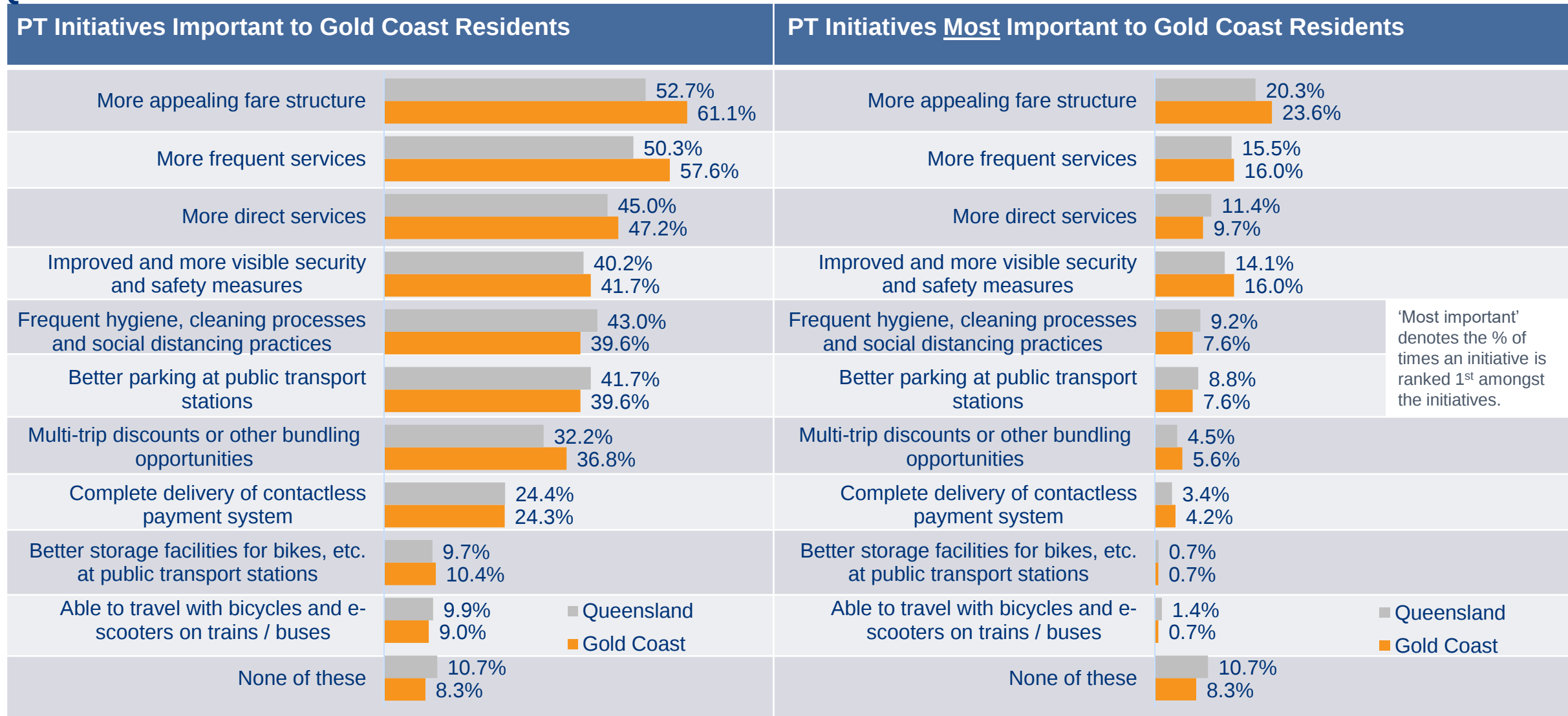
Over half of Non-users in Gold Coast would still not use Public Transport should their concerns be addressed, notably higher than the Queensland average. Those who still wouldn't use PT rose since last year, however this is likely linked to smaller base sizes.



Amongst those who would use public transport, modes that would be considered¹²



More appealing fare structure & More frequent services were selected by over half of Gold Coast residents and were the top “most important” initiatives. Security and safety measures were more important to Gold Coast residents than Frequent hygiene as compared with the rest of QLD.

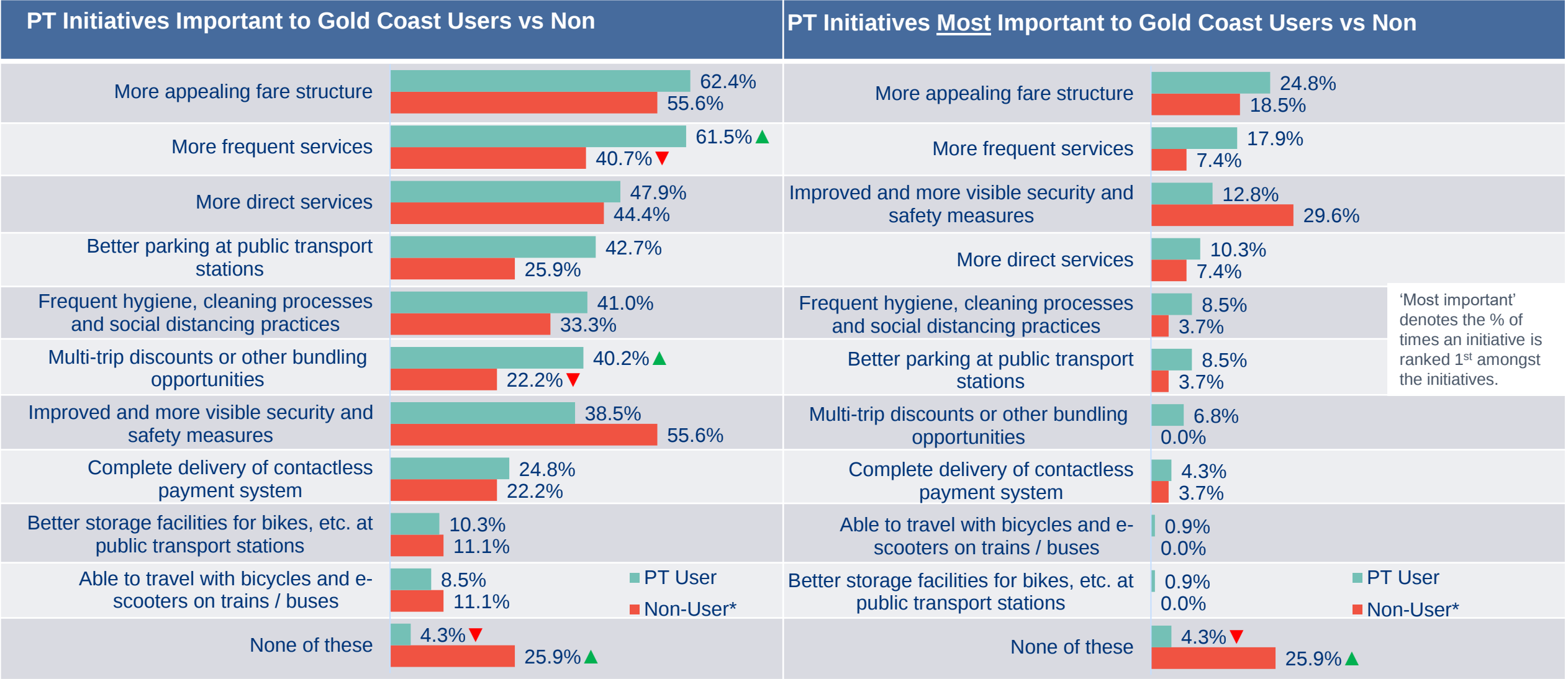


Source: Public Transport Survey 2023. Total n=1221. Gold Coast residents n=144.

32 Questions: P11. Please select which of these public transport initiatives are important to you? P12. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).

▲ ▼ Significant difference at 95% confidence level, GC vs QLD.

Fare structure and service frequency are of greater importance to PT Users in Gold Coast. Security and safety measures were the issues of greater importance to non-users.

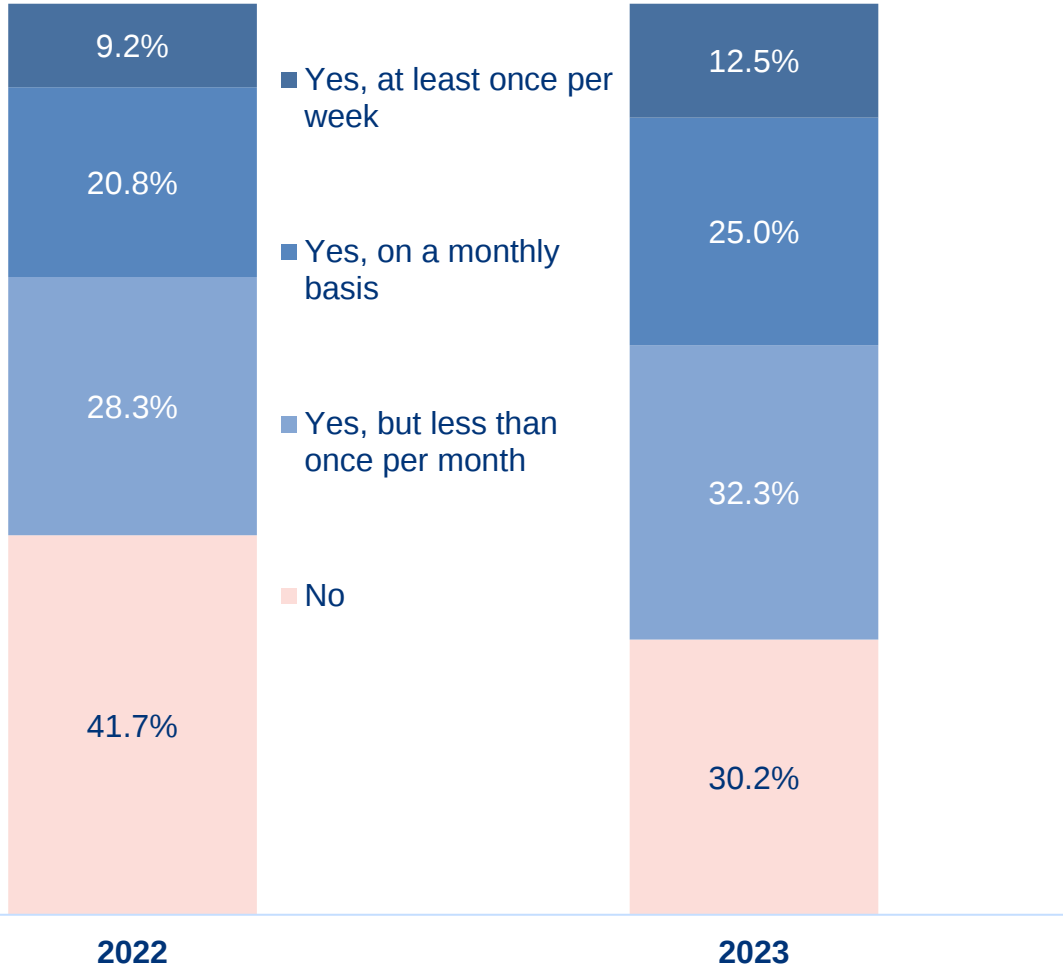


Moreton Bay

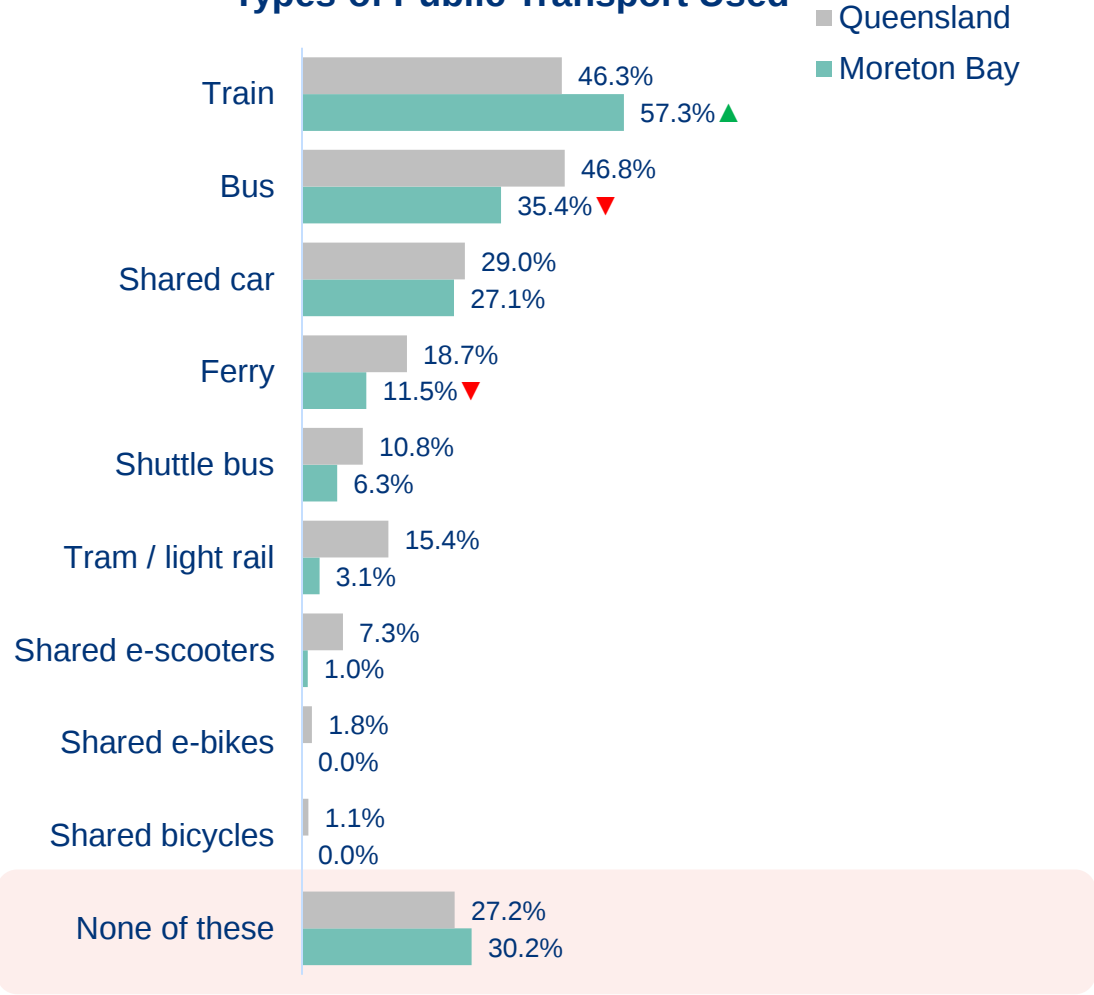
Public Transport User Profile

Moreton Bay residents exhibit slightly below average Public Transport Usage compared with other locations in Queensland. Train usage in Moreton Bay is significantly above the rest of the state, while Bus and Ferry usage is significantly lower. Non-usage dropped somewhat since 2022 with upticks in weekly, monthly and irregular PT Usage.

Do Moreton Bay Residents Use Public Transport?



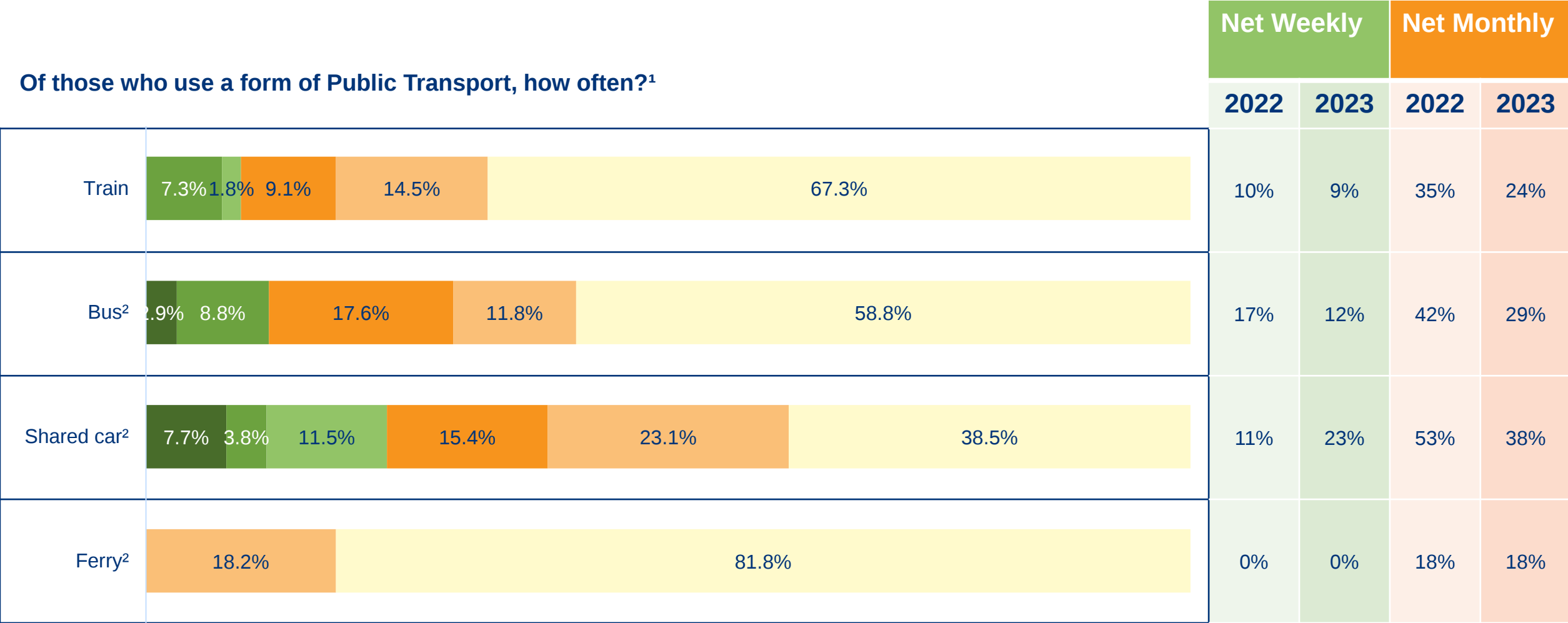
Types of Public Transport Used



In Moreton Bay, 2 in 3 Train Users only use it less than once per month, while Shared Car² users had the lowest proportion of irregular users.

Moreton Bay

Of those who use a form of Public Transport, how often?¹



- 4 or more days per week

■ 2-3 days per week

■ Once per week

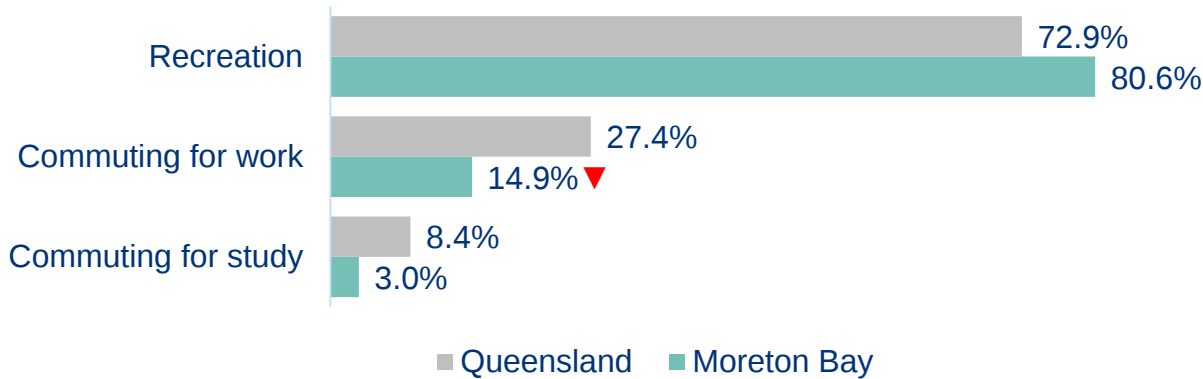
■ Multiple times per month

■ Once per month

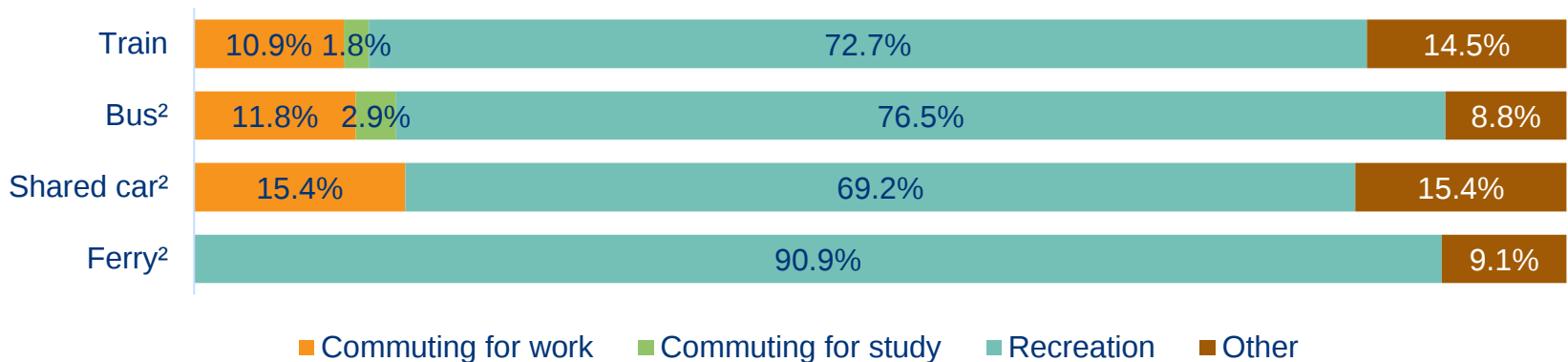
■ Less than once per month

Purposes for using PT in Moreton Bay reflect higher usage for *recreation*, and lower usage for *work* and *study* compared with other locations tested in Queensland. Likelihood of Places of Work/Study to Change amongst Moreton Bay residents was higher than Queensland overall, particularly on a daily basis.

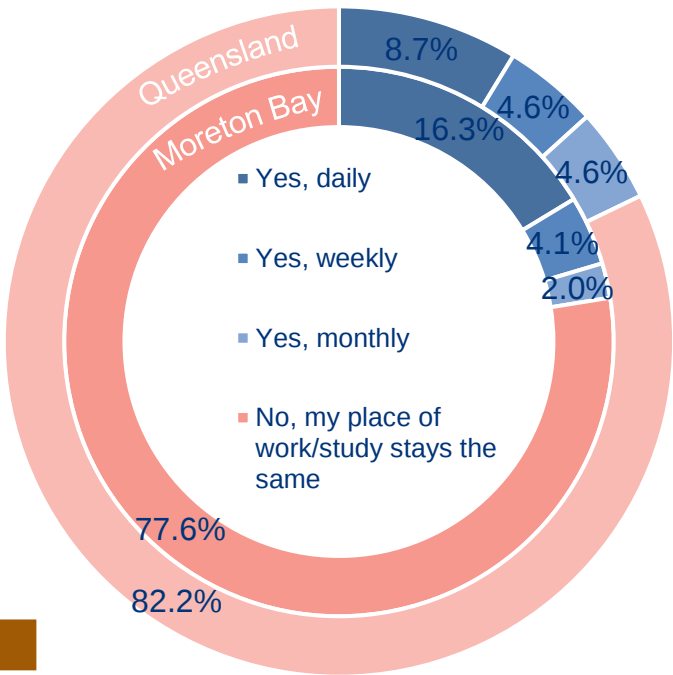
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹



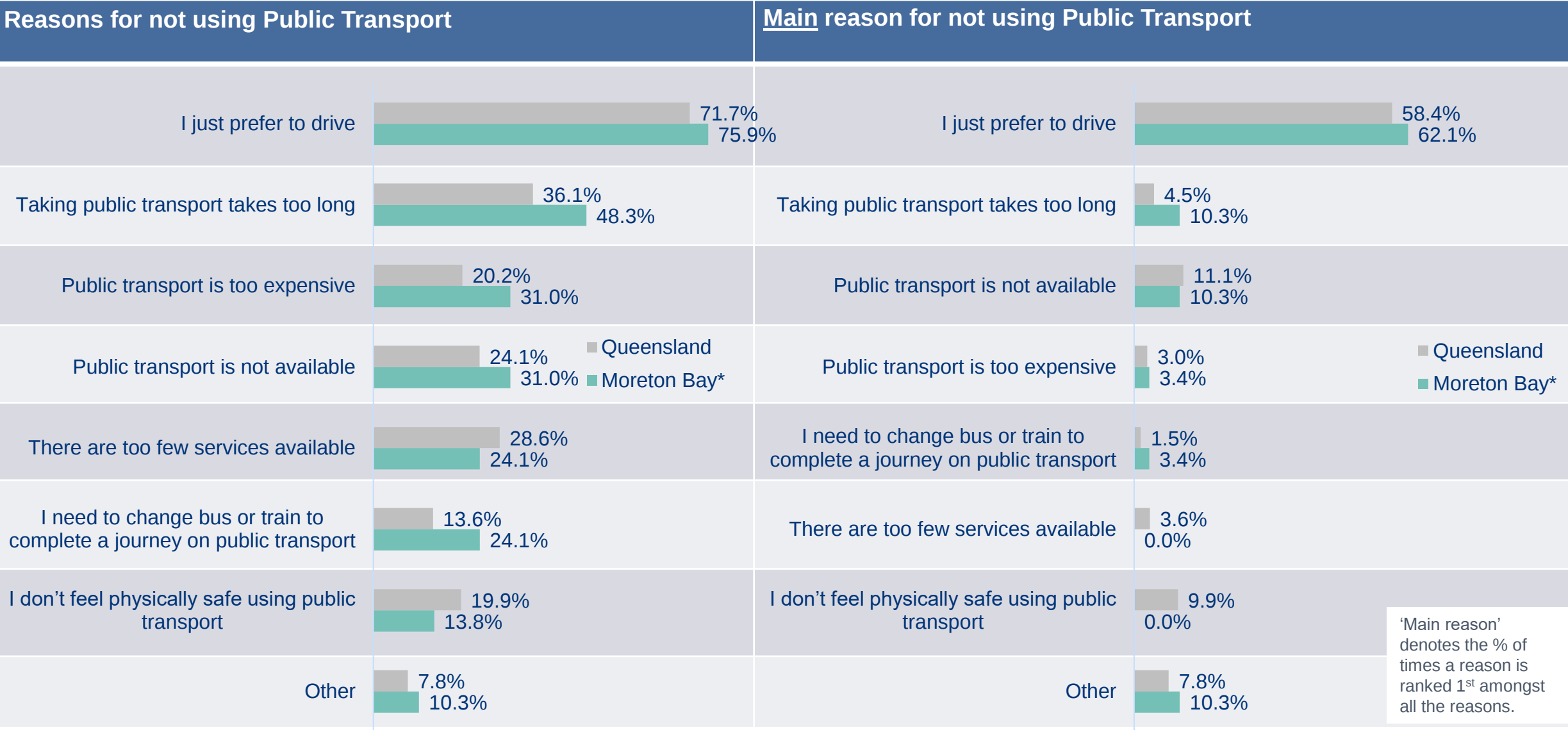
Place of Work/Study Change?^{*2}



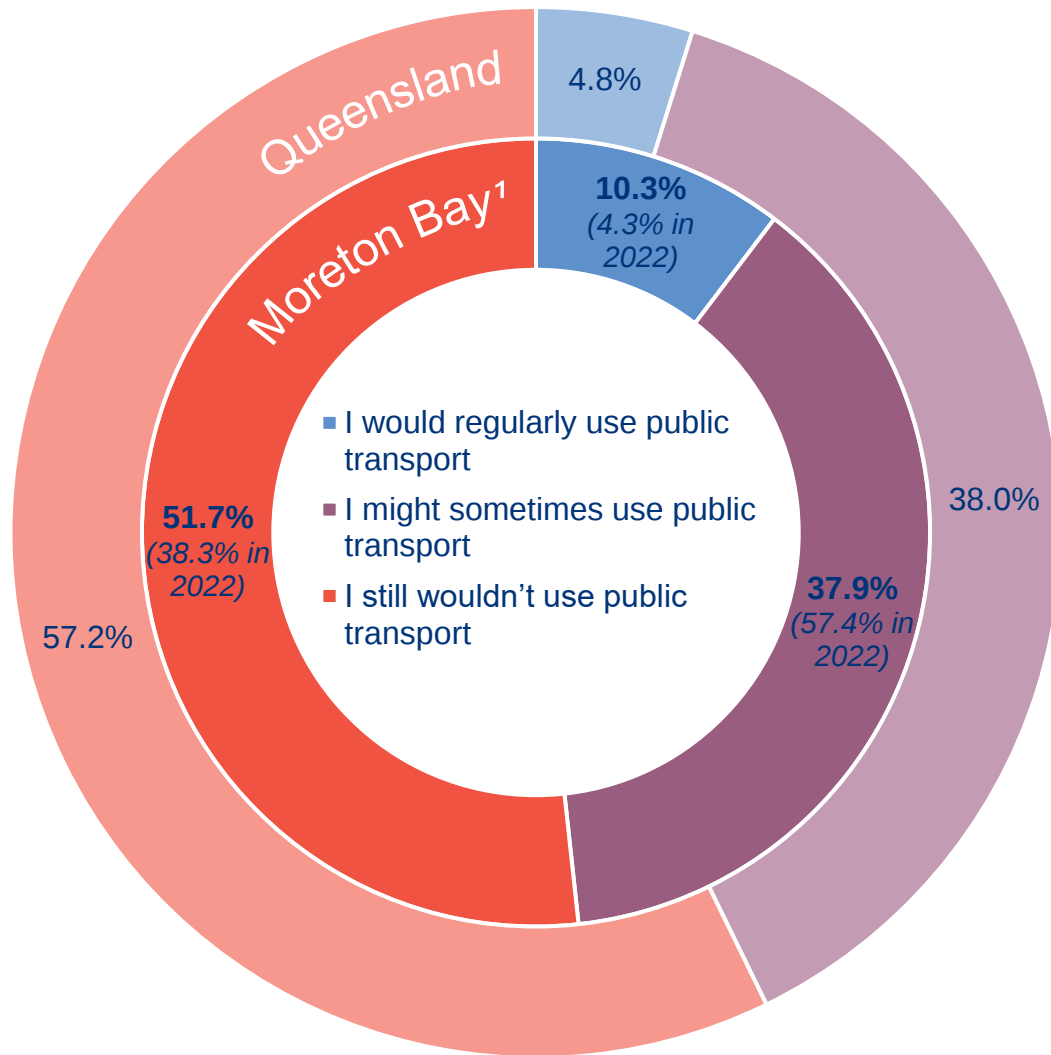
Source: Public Transport Survey 2023. Total n=1221. Moreton Bay PT users n=67 (Bus n=34; Train n=55; Shared car n=26; Ferry n=11; Tram/Light Rail n=3; Shuttle bus n=6; e-scooters n=1; e-bikes n=0; Bicycles n=0).
 Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?
 Note: ^{*}Asked of all residents who work or study; ¹Forms of transport with <10 responses are not presented here; ²CAUTION: Small base size <50.

▲ ▼ Significant difference at 95% confidence level, MB vs QLD.

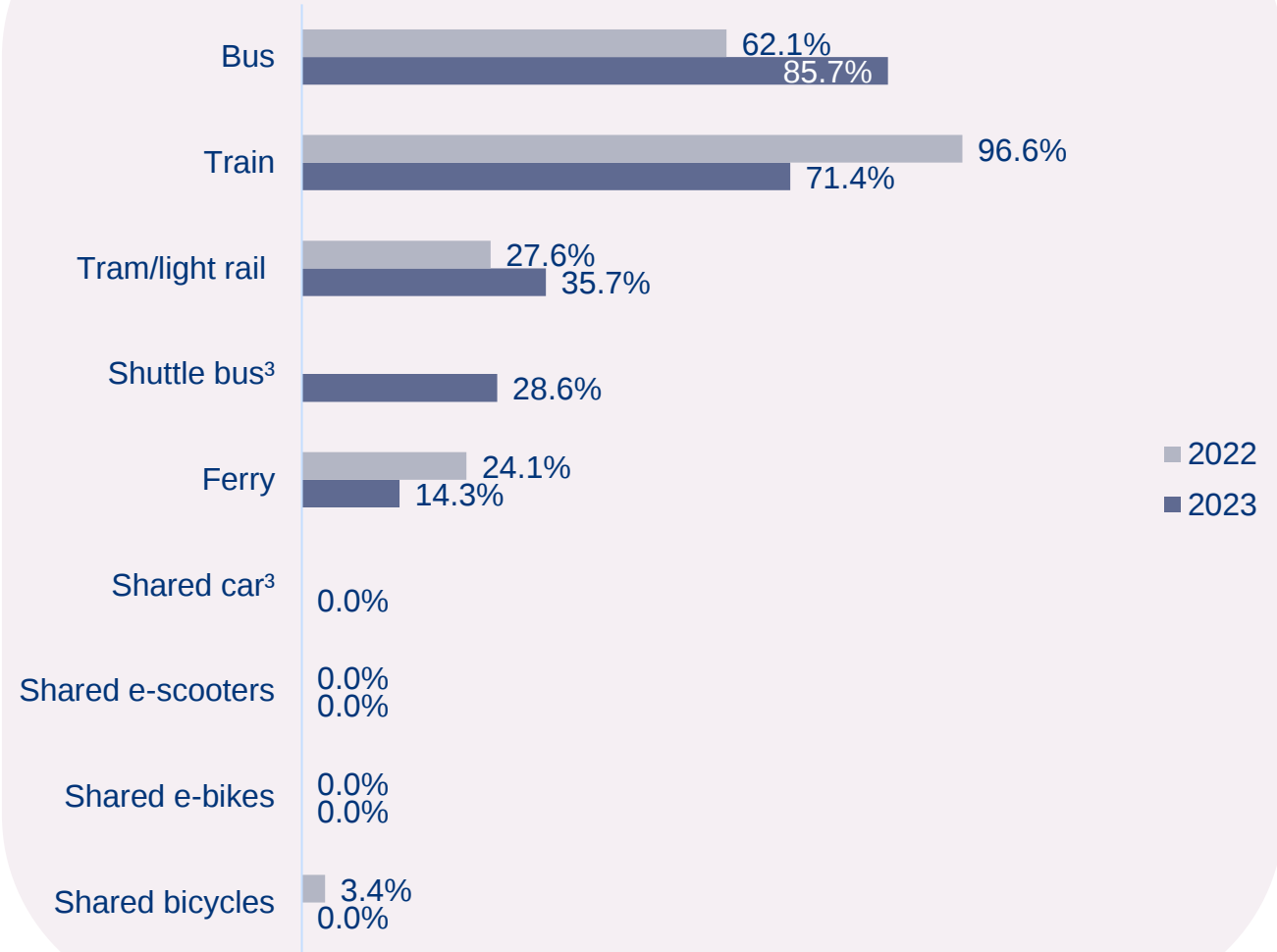
Preference to drive is both the most common and main reason for Moreton Bay residents to not use Public Transport. Almost 1 in 2 Non-users noted that PT takes too long, this being a main reason for 1 in 5.



Non-users in Moreton Bay were more likely to conditionally use Public Transport should their concerns be addressed; indeed, 10%¹ would become regular users. Those who still wouldn't use PT rose since last year, however this is likely linked to smaller base sizes.



Amongst those who would use public transport, modes that would be considered¹²

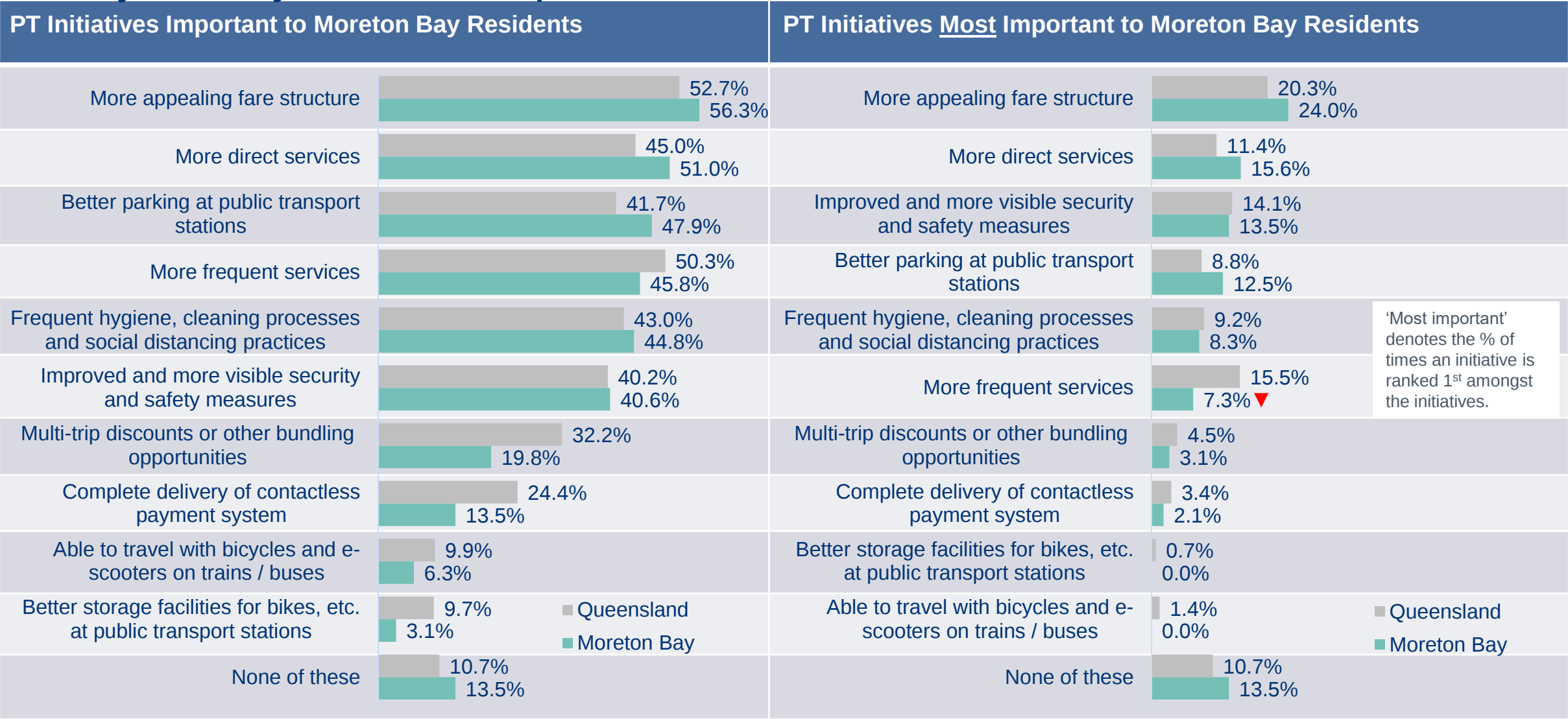


Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Moreton Bay non-users n=29, ²Those would use PT n=14) (2022 Moreton Bay non-users n=47, ²Those would use PT n=29)

Questions: NU4. If your concerns with public transport were improved, how likely would you be to use public transport? NU4. If you used any public transport, which of the following modes would you consider?

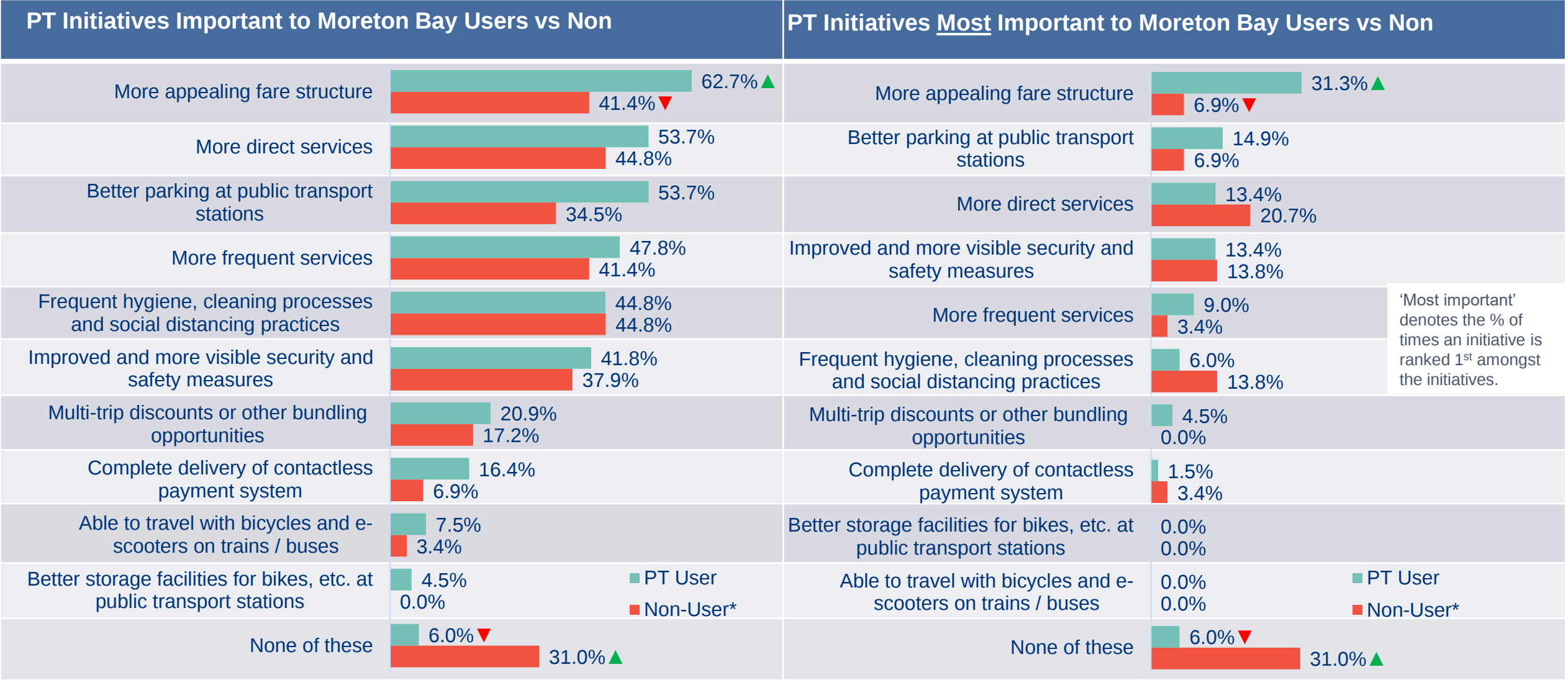
Note: ¹CAUTION: Small Base Size <50; ³2022 Shuttle bus and Shared car categories were combined and have not been presented above.

More appealing fare structure and More direct services were selected by over half of Moreton Bay residents and were the top “most important” initiatives. *Better parking* was a ‘most important’ initiative relatively more for Moreton Bay residents. *More frequent service* was significantly less likely to be a ‘most important’ initiative.



Source: Public Transport Survey 2023. Total n=1221. Moreton Bay residents n=96.
 Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).

Fare structure, service frequency and Better parking are of greater importance to PT Users in Moreton Bay. Direct service and security measures were the issues of greater importance to non-users.

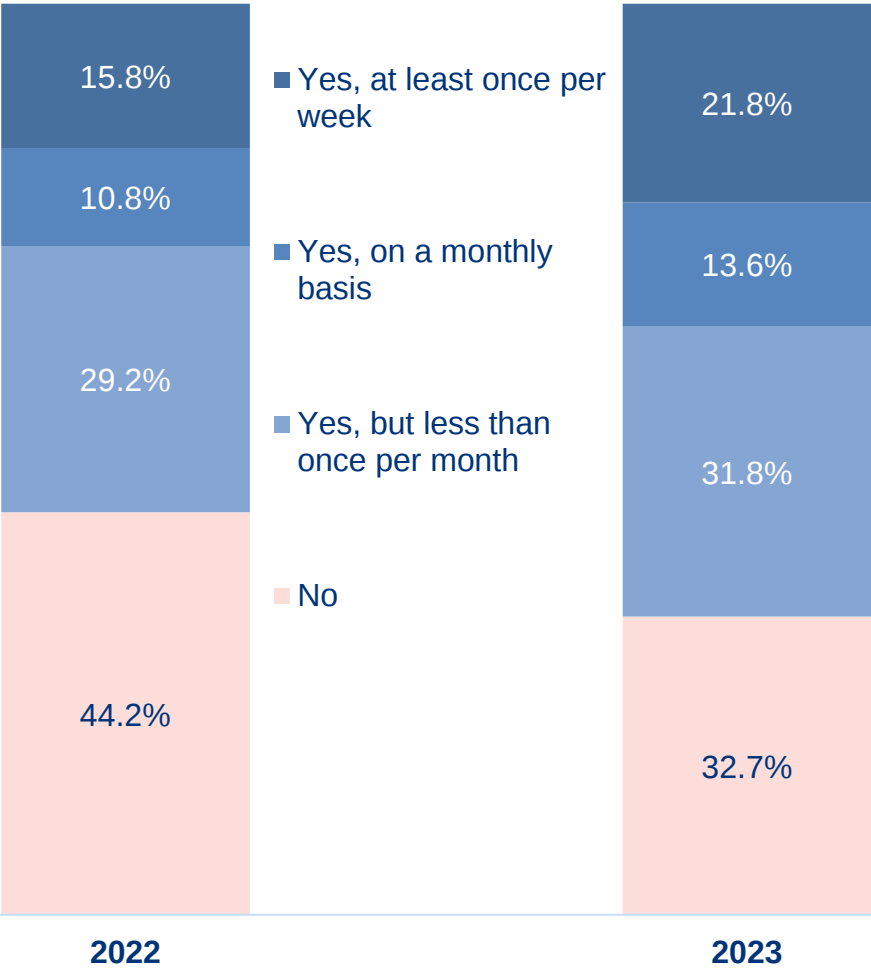


'Most important' denotes the % of times an initiative is ranked 1st amongst the initiatives.

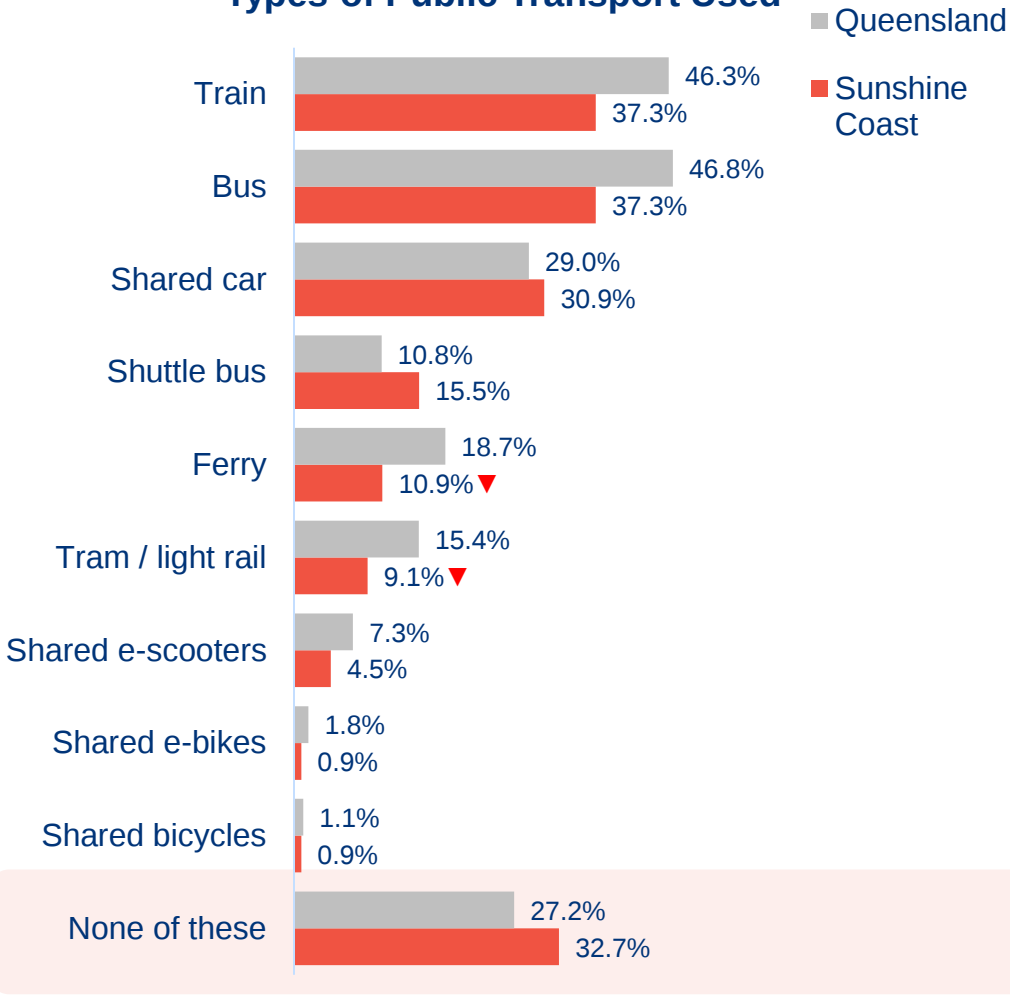
Sunshine Coast / Noosa Public Transport User Profile

Sunshine Coast residents exhibit slightly below-average Public Transport Usage compared with other locations in Queensland. Usage of most transport forms was lower in Sunshine Coast, significantly so for Ferry and Tram/Light Rail, except for Shared car and Shuttle bus usage which were slightly higher. Non-usage dropped somewhat since 2022 with a particular uptick in weekly PT Usage.

Do Sunshine Coast Residents Use Public Transport?



Types of Public Transport Used



Source: Public Transport Survey 2023. Total n=1221. Sunshine Coast residents n=110 (2022 Sunshine Coast residents n=120)
 Questions: Q1. Please indicate if you have used any of these forms of public transport at any time in the past 12 months. PT1. Please indicate how often you use these public transport options...

▲ ▼ Significant difference at 95% confidence level, SC vs QLD.

Though Bus and Train have the highest number of users among Sunshine Coast residents, only a third of their respective users travel on them on a weekly/monthly basis. Conversely, weekly to monthly usage represents almost 2 thirds of Shared Car Usage here.

Of those who use a form of Public Transport, how often?¹

Of those who use a form of Public Transport, how often? ¹							Net Weekly		Net Monthly	
							2022	2023	2022	2023
Train ²	4.9%	4.9%	7.3%	4.9%	9.8%	68.3%	20%	17%	23%	15%
Bus ²	4.9%	4.9%	2.4%	9.8%	12.2%	65.9%	33%	12%	21%	22%
Shared car ²	11.8%	5.9%	14.7%	23.5%	8.8%	35.3%	13%	32%	33%	32%
Shuttle bus ²	5.9%	11.8%	5.9%	76.5%			20%	18%	10%	6%
Ferry ²	16.7%	8.3%	16.7%	58.3%			8%	17%	39%	25%
Tram / light rail ²	40.0%	10.0%	50.0%				29%	0%	0%	50%

- 4 or more days per week

■ 2-3 days per week

■ Once per week

■ Multiple times per month

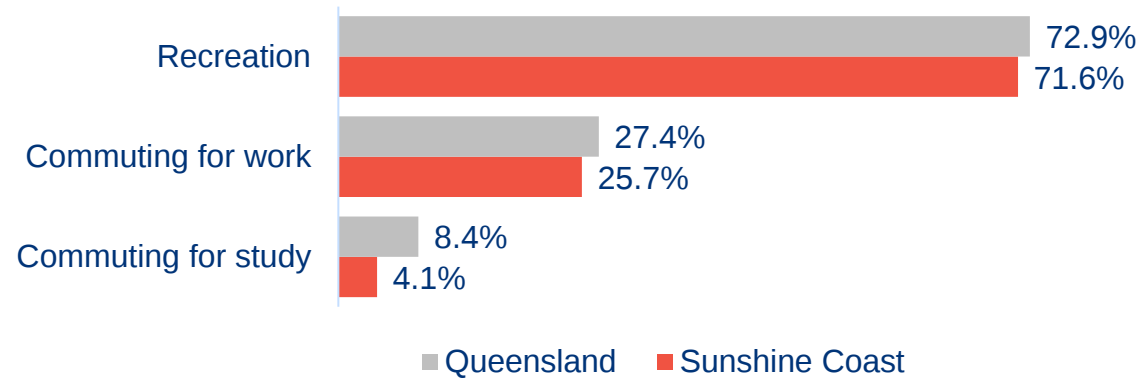
■ Once per month

■ Less than once per month

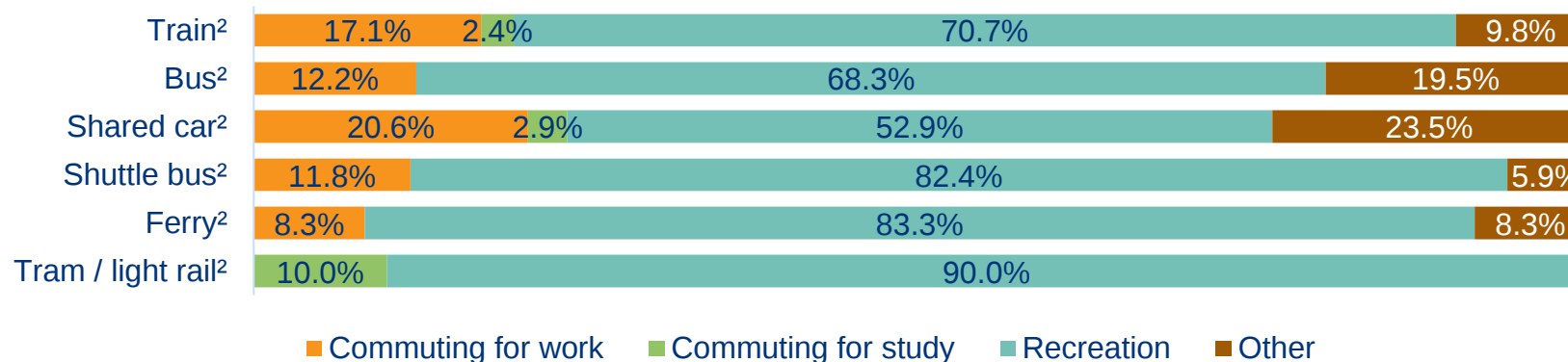
Source: Public Transport Survey 2023. Total n=1221. Sunshine Coast PT users n=74 (Bus n=41; Train n=41; Shared car n=34; Ferry n=12; Tram/Light Rail n=10; Shuttle bus n=17; e-scooters n=5; e-bikes n=1; Bicycles n=1)
Questions: PT1. Please indicate how often you use these public transport options...
Note: ¹Forms of transport with <10 responses are not presented here ²CAUTION: Small base size <50.

Purposes for using PT in Sunshine Coast are largely on par with the rest of Queensland, though slightly lower usage to *commute for study*. Likelihood of Places of Work/Study to Change amongst Sunshine Coast residents was higher than Queensland overall, particularly on weekly and monthly bases.

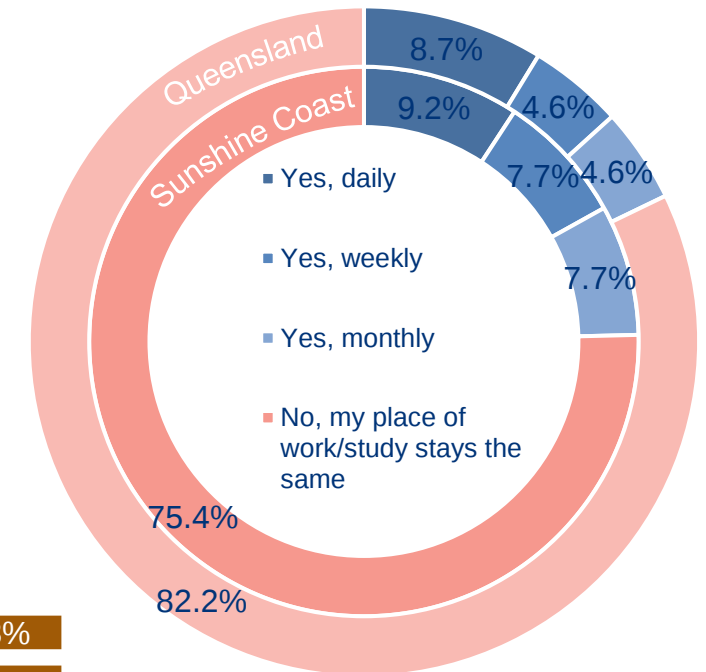
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹



Place of Work/Study Change?*



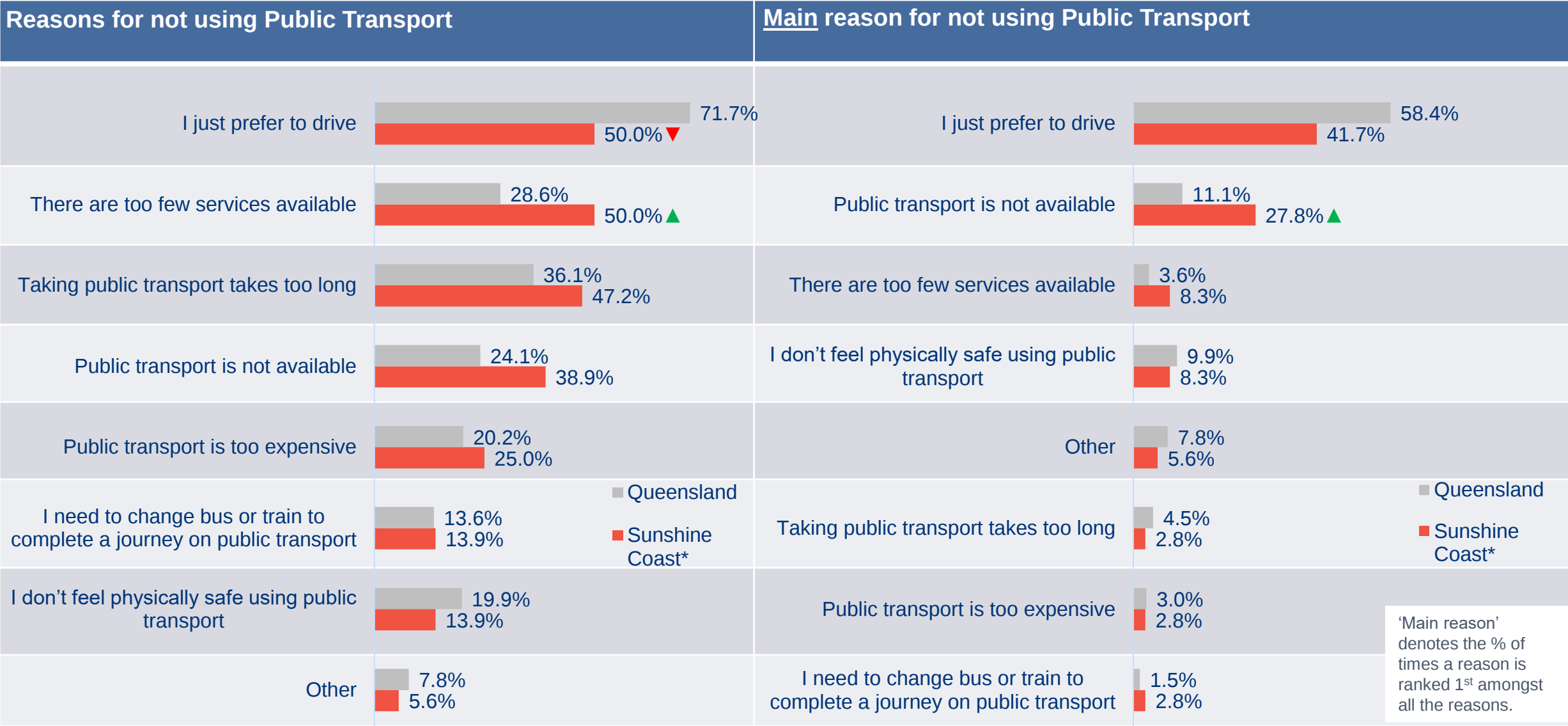
Source: Public Transport Survey 2023. Total n=1221. Sunshine Coast PT users n=74 (Bus n=41; Train n=41; Shared car n=34; Ferry n=12; Tram/Light Rail n=10; Shuttle bus n=17; e-scooters n=5; e-bikes n=1; Bicycles n=1)

Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?

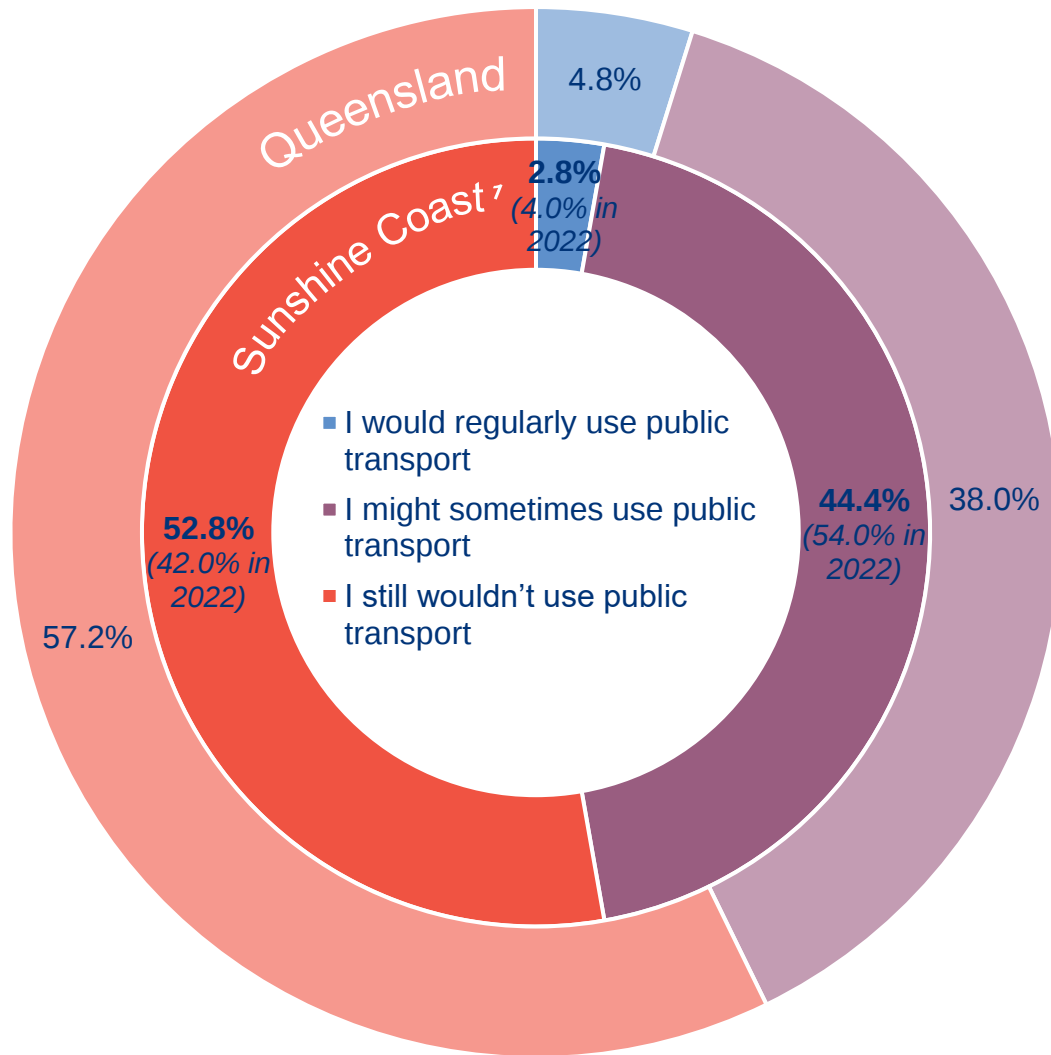
Note: *Asked of all residents who work or study; ¹Forms of transport with <10 responses are not presented here; ²CAUTION: Small base size <50.

▲ ▼ Significant difference at 95% confidence level, SC vs QLD.

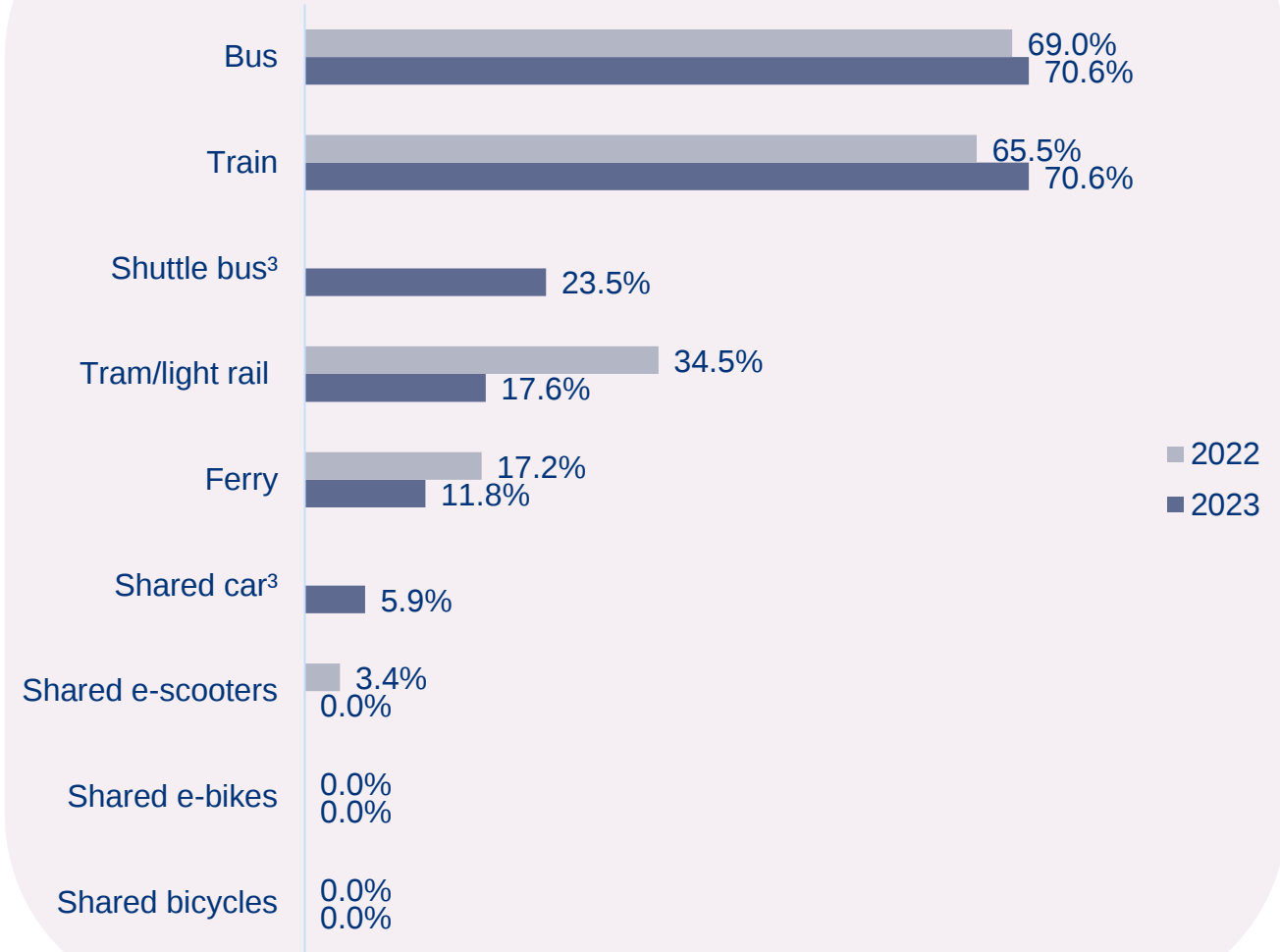
While *Preference to drive* is one of the most common and the top main reason for Sunshine Coast residents to not use Public Transport, this was considerably lower than the rest of QLD. Indeed, *too few services* and the *unavailability of PT* were significantly more typical and main reasons for non-usage.



Non-users in Sunshine Coast were more likely than average to conditionally use Public Transport should their concerns be addressed. Those who still wouldn't use PT rose since last year, however this is likely linked to smaller base sizes.



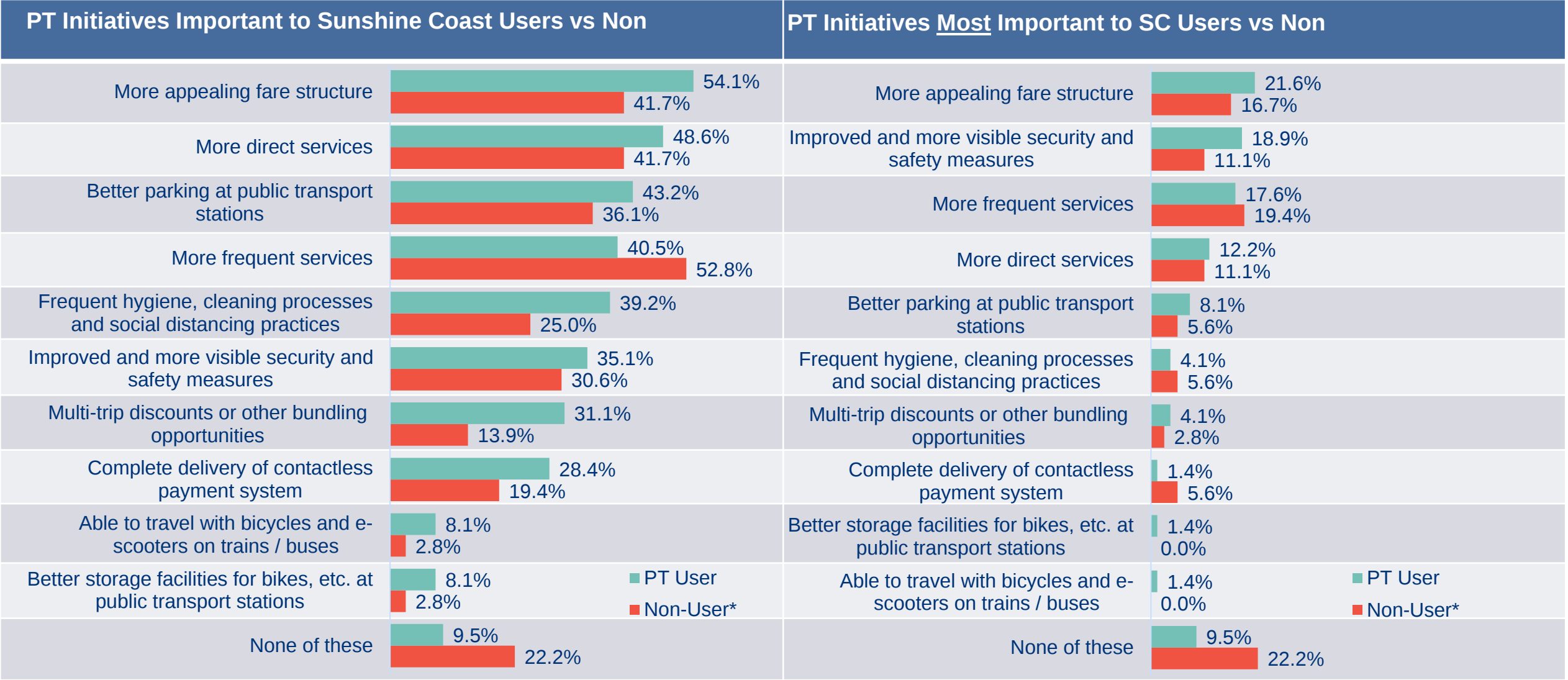
Amongst those who would use public transport, modes that would be considered¹²



More appealing fare structure was selected by 1 in 2 Sunshine Coast residents as well as the “most important” initiative, however *service frequency* and *security measures* follow closely. *Frequent hygiene* was significantly less likely to be a ‘most important’ initiative than the QLD average.

PT Initiatives Important to Sunshine Coast Residents			PT Initiatives <u>Most</u> Important to Sunshine Coast Residents		
More appealing fare structure	52.7% 50.0%		More appealing fare structure	20.3% 20.0%	
More direct services	45.0% 46.4%		More frequent services	15.5% 18.2%	
More frequent services	50.3% 44.5%		Improved and more visible security and safety measures	14.1% 16.4%	
Better parking at public transport stations	41.7% 40.9%		More direct services	11.4% 11.8%	‘Most important’ denotes the % of times an initiative is ranked 1 st amongst the initiatives.
Frequent hygiene, cleaning processes and social distancing...	43.0% 34.5%		Better parking at public transport stations	8.8% 7.3%	
Improved and more visible security and safety measures	40.2% 33.6%		Frequent hygiene, cleaning processes and social distancing...	9.2% 4.5%▼	
Multi-trip discounts or other bundling opportunities	32.2% 25.5%		Multi-trip discounts or other bundling opportunities	4.5% 3.6%	
Complete delivery of contactless payment system	24.4% 25.5%		Complete delivery of contactless payment system	3.4% 2.7%	
Able to travel with bicycles and e-scooters on trains / buses	9.9% 6.4%		Better storage facilities for bikes, etc. at public transport stations	0.7% 0.9%	
Better storage facilities for bikes, etc. at public transport stations	9.7% 6.4%	Queensland Sunshine Coast	Able to travel with bicycles and e-scooters on trains / buses	1.4% 0.9%	Queensland Sunshine Coast
None of these	10.7% 13.6%		None of these	10.7% 13.6%	

Fare structure, security measures and direct services are of greater importance to PT Users in Sunshine Coast. Service frequency was of greater importance to non-users.

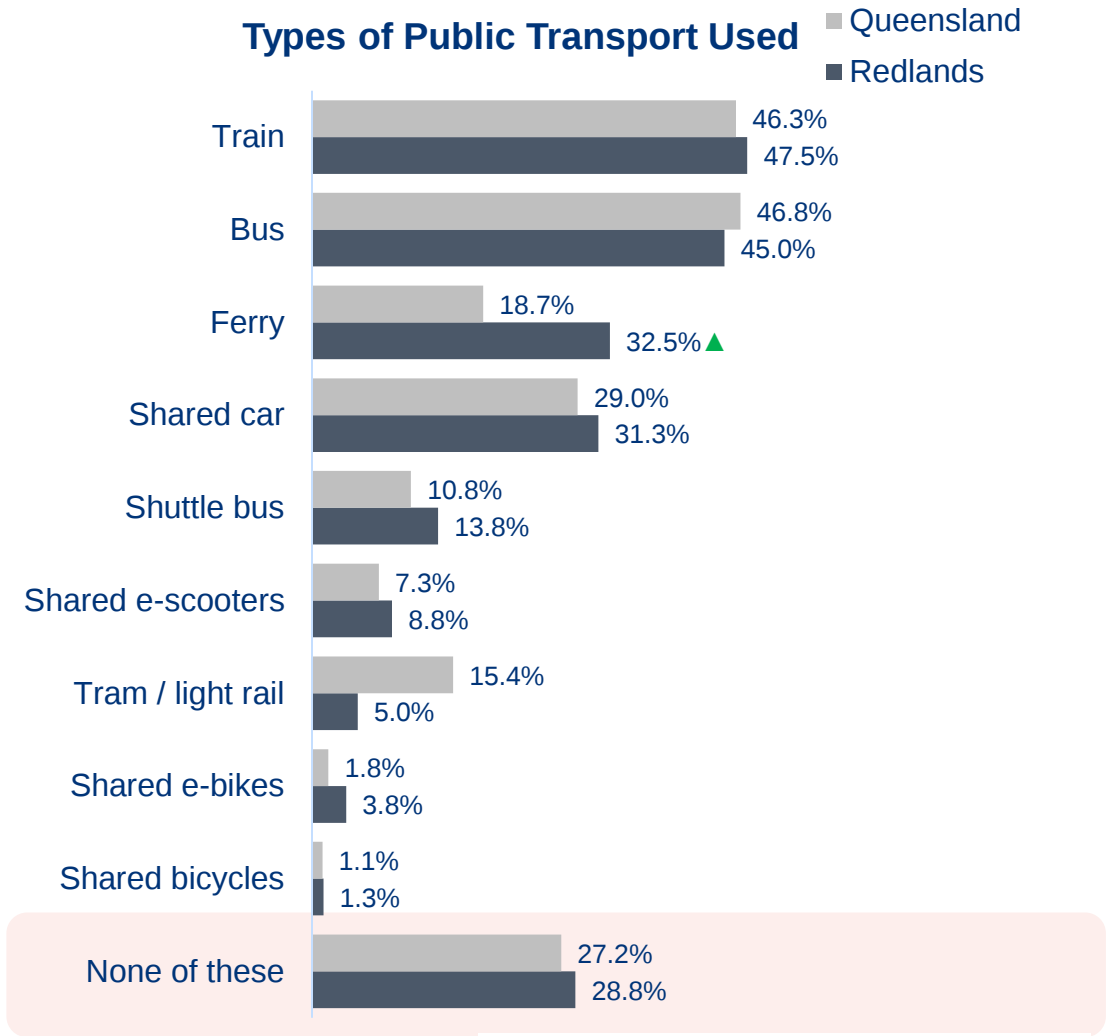
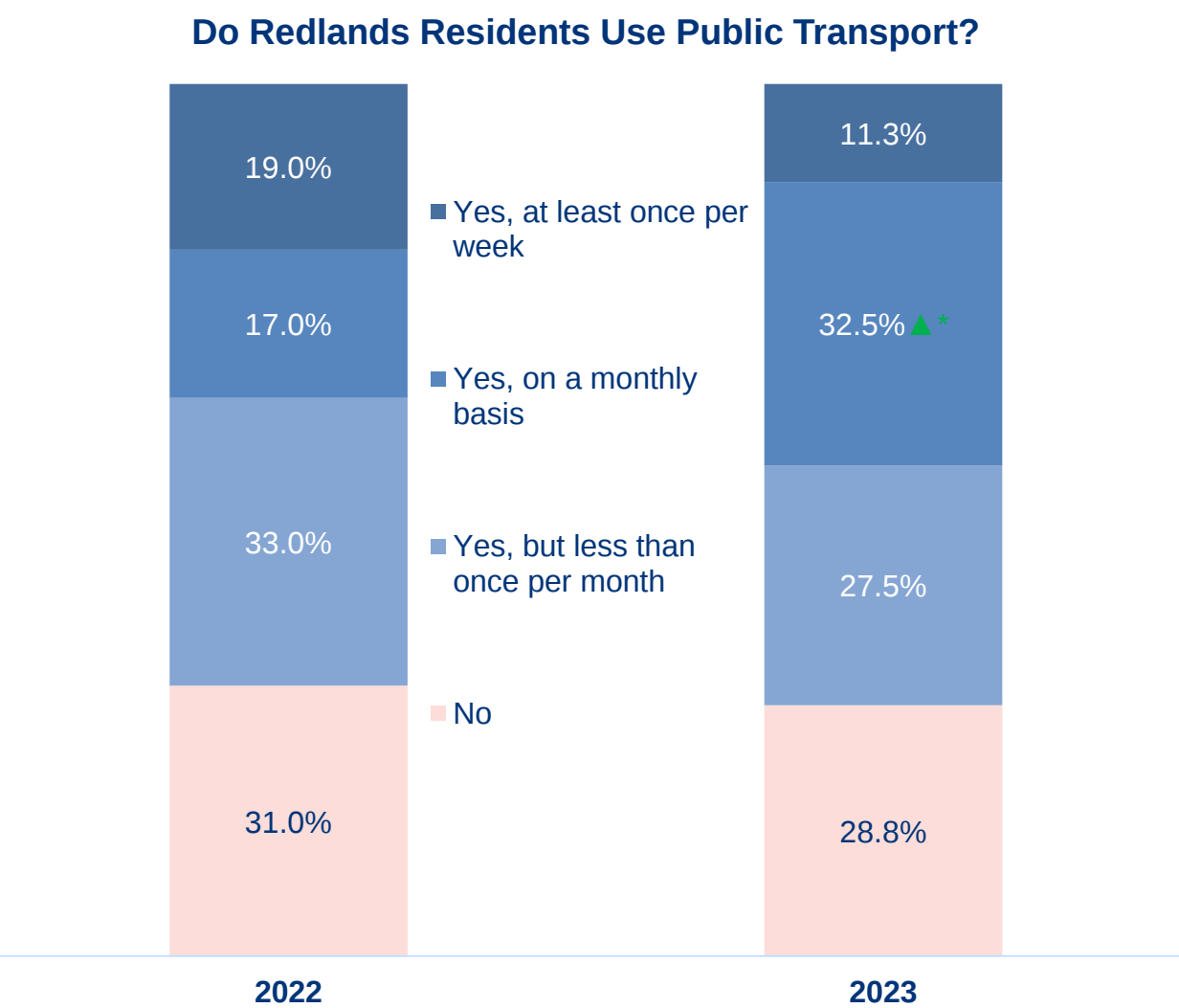


Source: Public Transport Survey 2023. Total n=1221. Sunshine Coast residents m=110 (PT Users n=74, Non-users n=36)
Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).
Note: *CAUTION: Small Base Size <50

Redlands

Public Transport User Profile

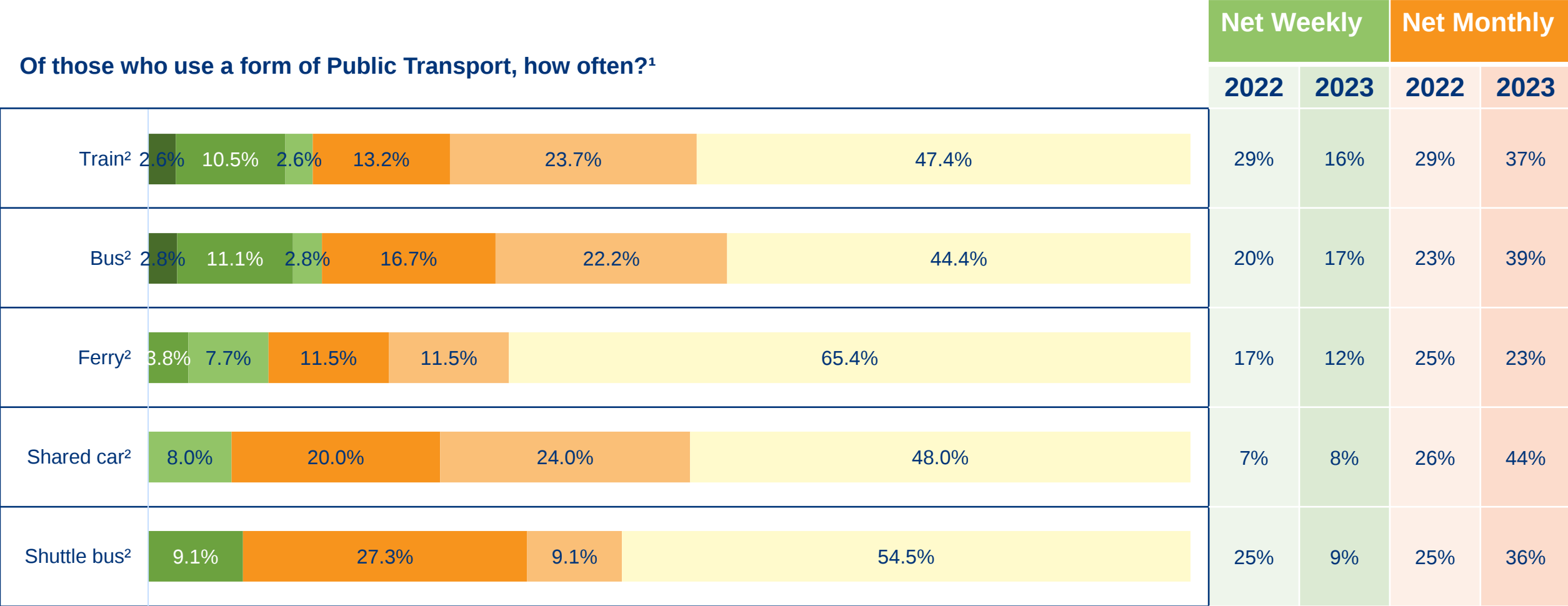
Redlands residents exhibit Public Transport Usage consistent with the state-wide average. Ferry usage is significantly higher here while Tram/light rail usage is somewhat lower. Non-usage dropped slightly since 2022 with a significant uptick in monthly PT Usage.



▲ ▼ Significant difference at 95% confidence level, Redlands vs QLD
*▲ ▼ Significant difference at 95% confidence level, latest vs previous year..

In Redlands, over half of respective Train and Bus users travel on these at least monthly, whereas 2 in 3 Ferry users travel on it irregularly.

Of those who use a form of Public Transport, how often?¹

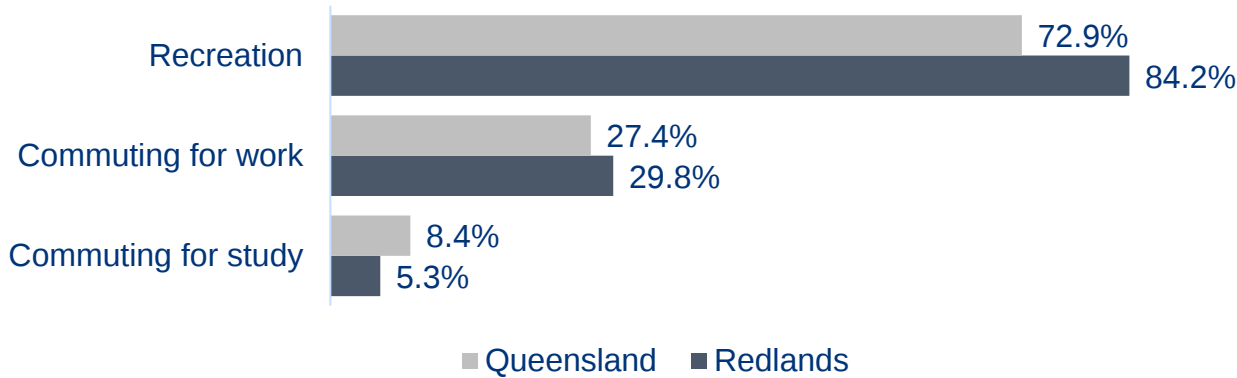


■ 4 or more days per week ■ 2-3 days per week ■ Once per week
■ Multiple times per month ■ Once per month ■ Less than once per month

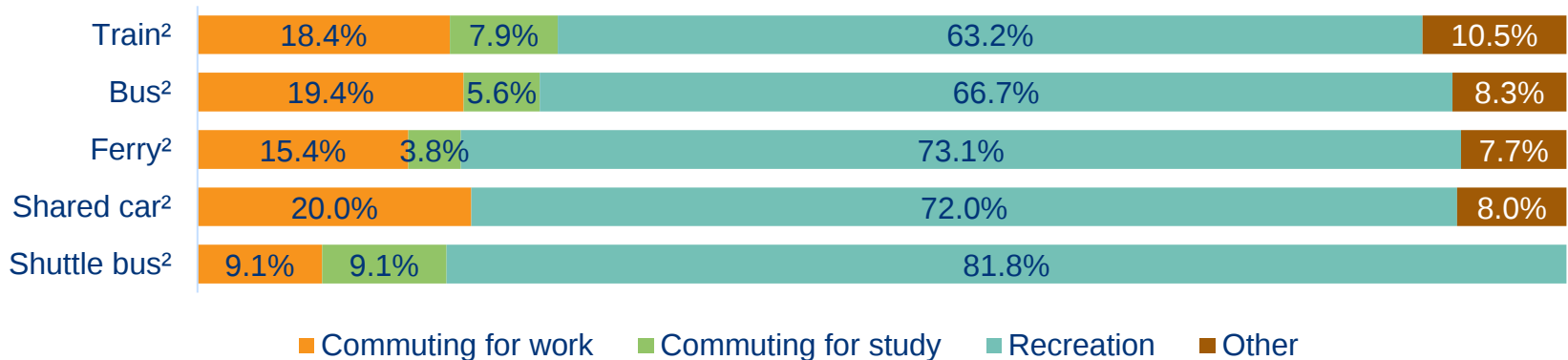
Source: Public Transport Survey 2023. Total n=1221. Redlands PT users n=57 (Bus n=36; Train n=38, Shared car n=25; Ferry n=26; Tram/Light Rail n=4, Shuttle bus n=11, e-scooters n=7, e-bikes n=3, Bicycles n=1)
Questions: PT1. Please indicate how often you use these public transport options...
Note: ¹Forms of transport with <10 responses are not presented here ²CAUTION: Small base size <50.

Purposes for using PT in Redlands reflect higher usage for *recreation* and *commuting for work*, and lower usage for *commuting for study* compared with other locations tested in Queensland. Likelihood of Places of Work/Study to Change amongst Redlands residents was higher than Queensland overall.

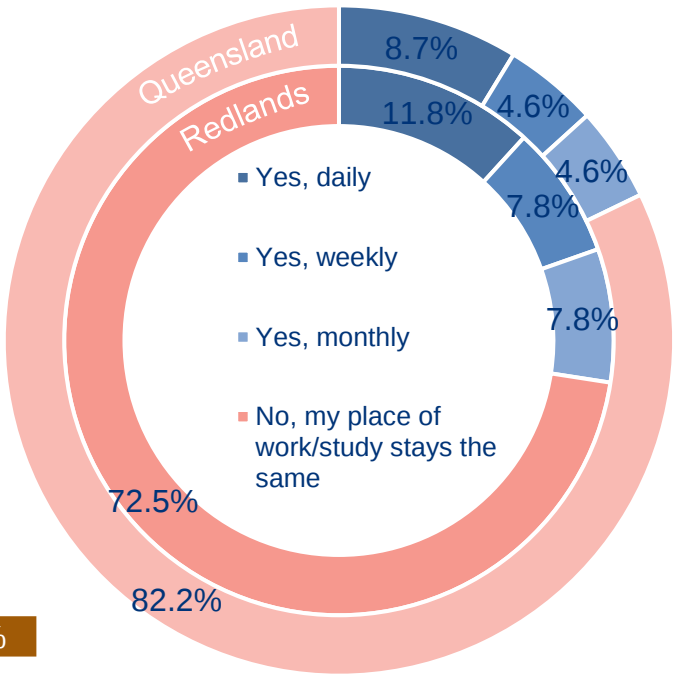
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹

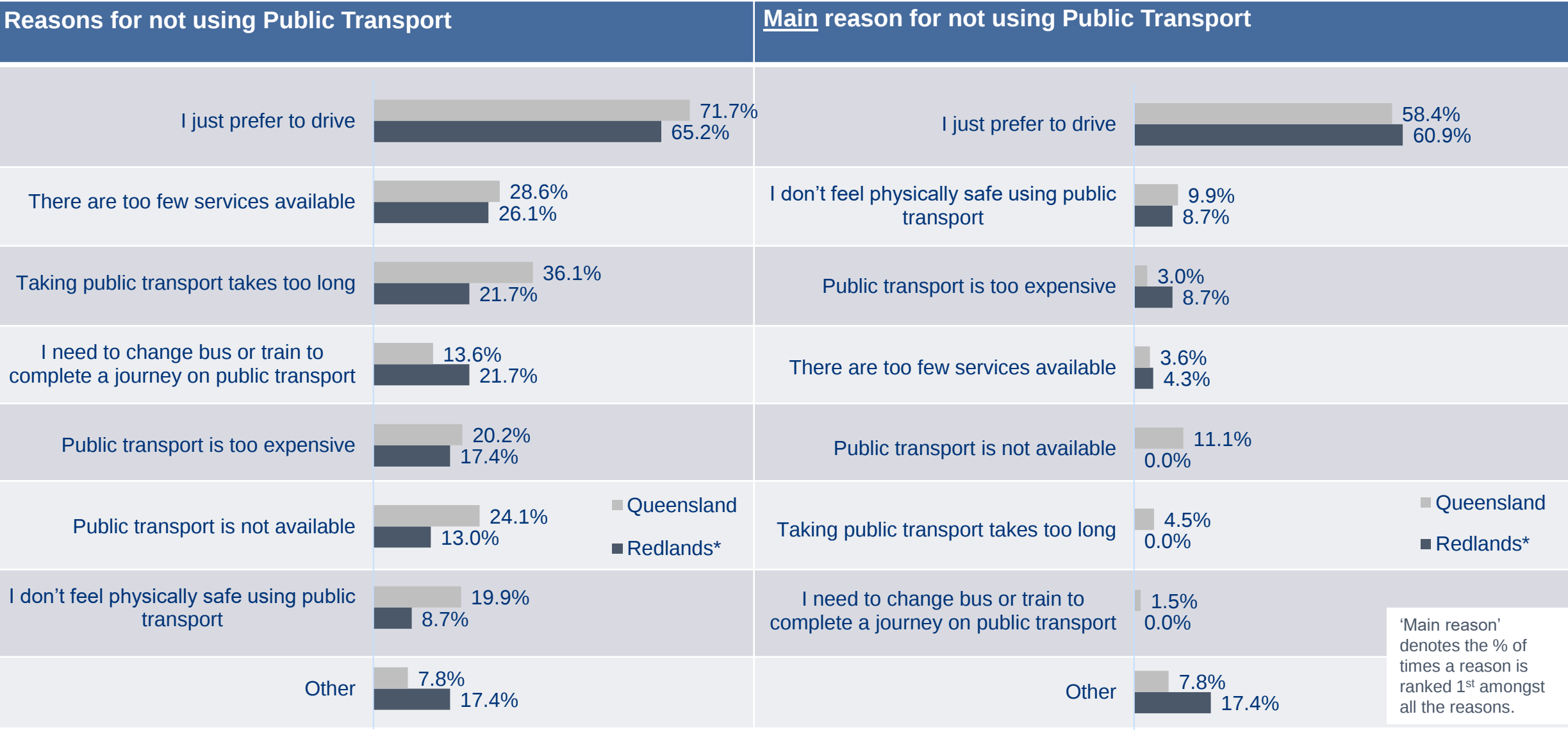


Place of Work/Study Change?*

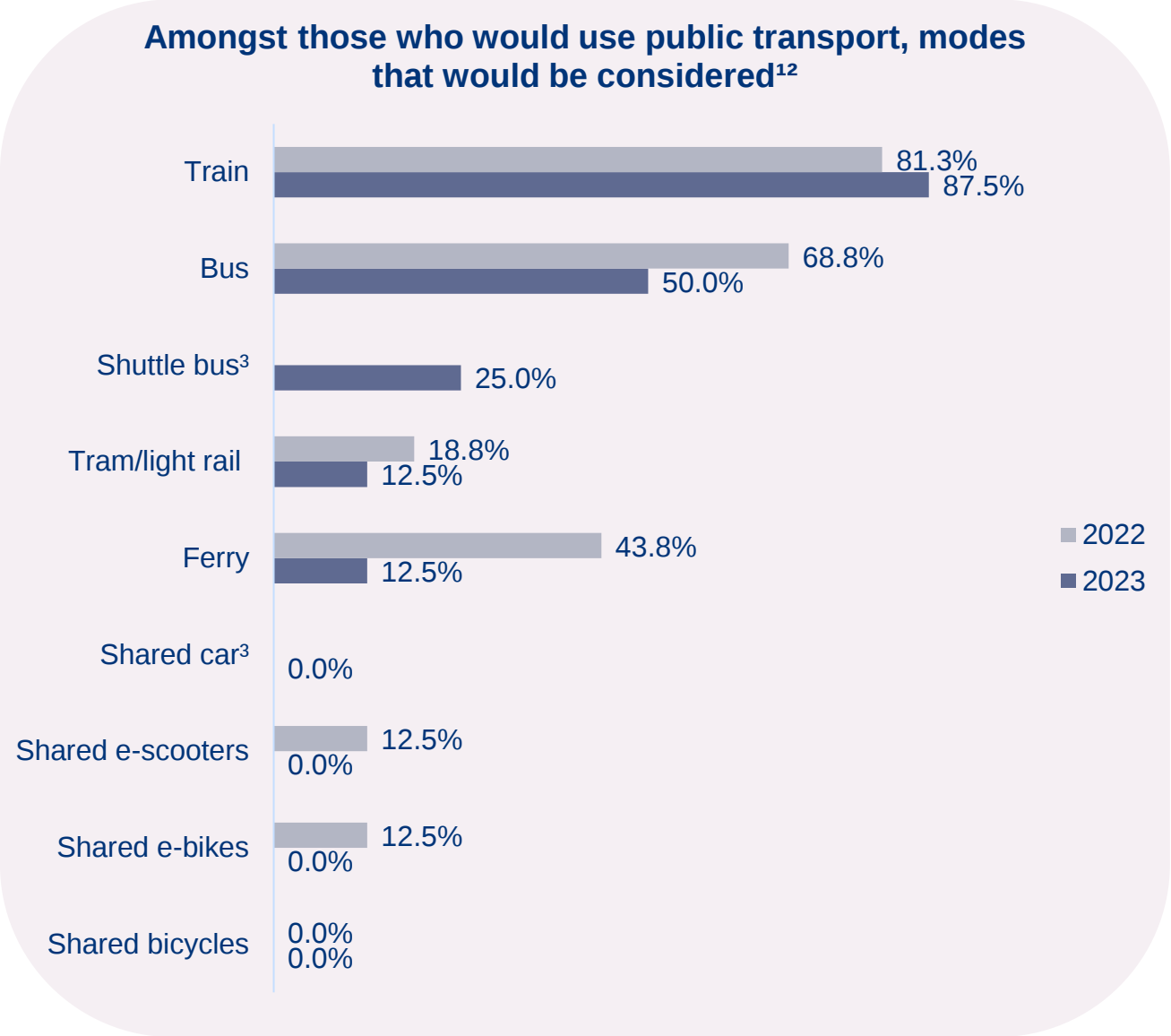
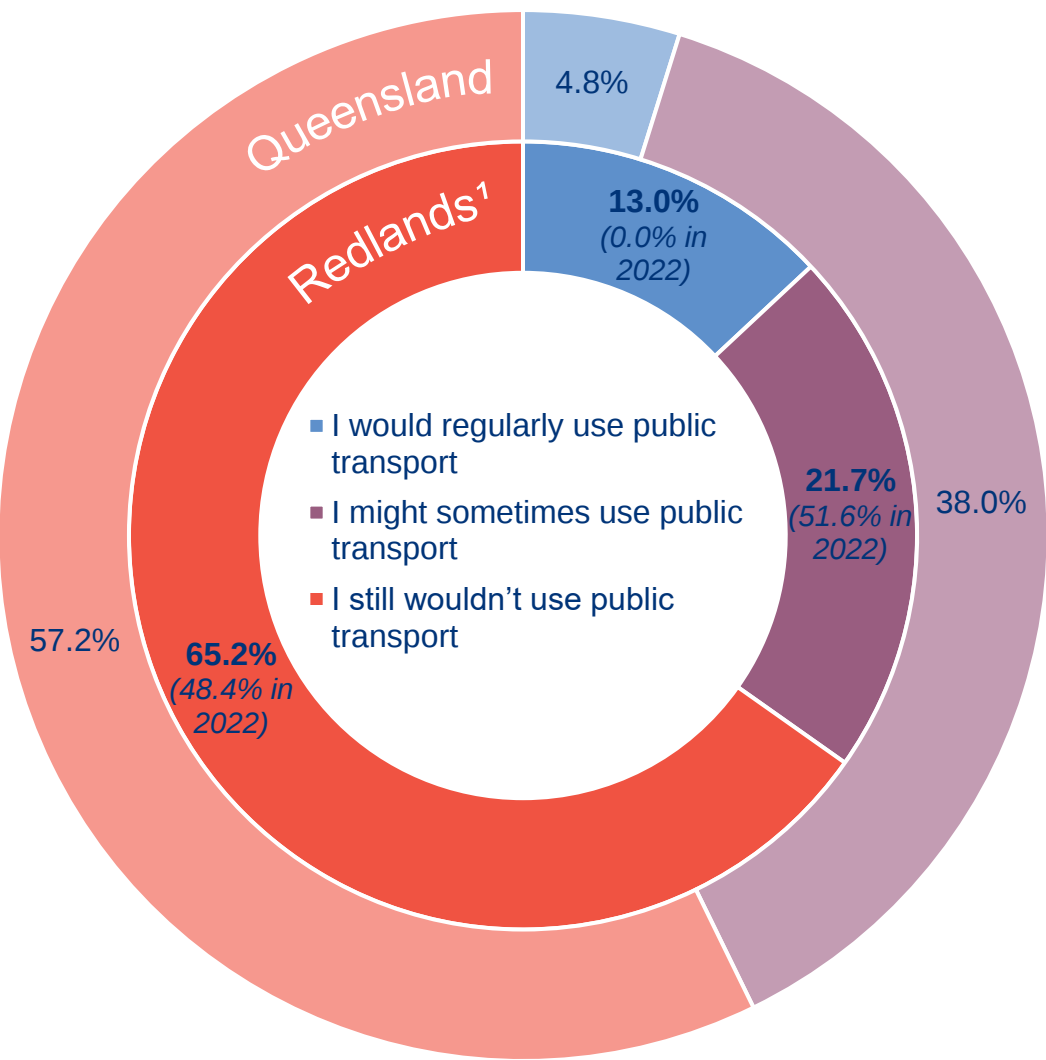


Source: Public Transport Survey 2023. Total n=1221. Redlands PT users n=57 (Bus n=36; Train n=38; Shared car n=25; Ferry n=26; Tram/Light Rail n=4; Shuttle bus n=11; e-scooters n=7; e-bikes n=3; Bicycles n=1)
 Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?
 Note: ¹Asked of all residents who work or study; ²Forms of transport with <10 responses are not presented here; ³CAUTION: Small base size <50.

Preference to drive is the most common and the top main reason for Redlands residents to not use Public Transport. Amongst the main reasons for non-usage were *physical safety* and *too expensive*, while anecdotally respondents mentioned no need to use, impracticality for work, and the ability to walk where they need to go.

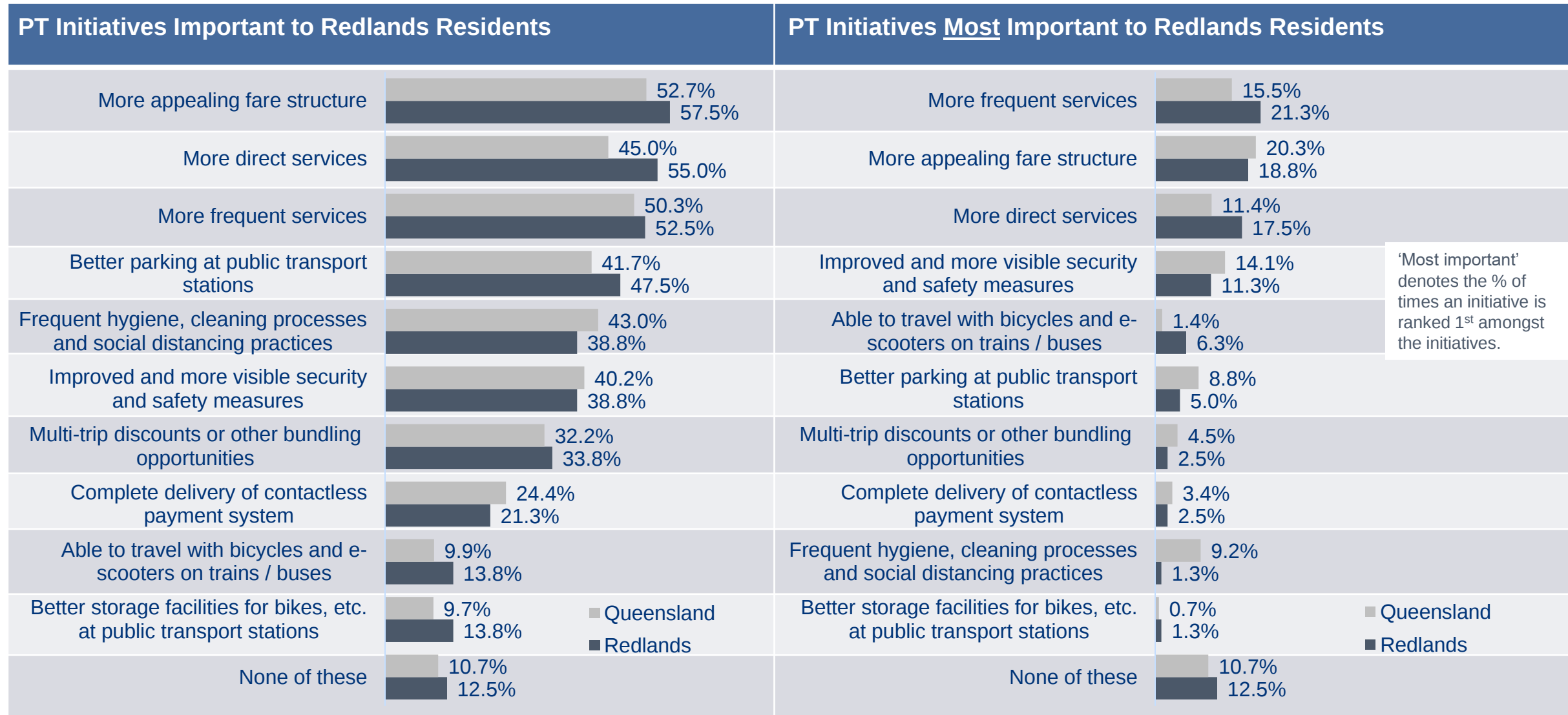


Non-users in Redlands were less likely than average to conditionally use Public Transport should their concerns be addressed. Those who *would regularly* use as well as still *wouldn't* use PT rose since last year, however these are likely linked to smaller base sizes.



Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Redlands non-users n=23, ²Those would use PT n=8) (2022 Redlands non-users n=31, ²Those would use PT n=16)
 Questions: NU4. If your concerns with public transport were improved, how likely would you be to use public transport? NU4. If you used any public transport, which of the following modes would you consider?
 Note: ¹CAUTION: Small Base Size <50; ³2022 Shuttle bus and Shared car categories were combined and have not been presented above.

More frequent service was most likely to be the ‘most important’ initiative to Redlands residents, while fare structure and direct service follow closely. Ability to travel with bikes/scooters was relatively more likely to be a ‘most important’ initiative while frequent hygiene was less likely.



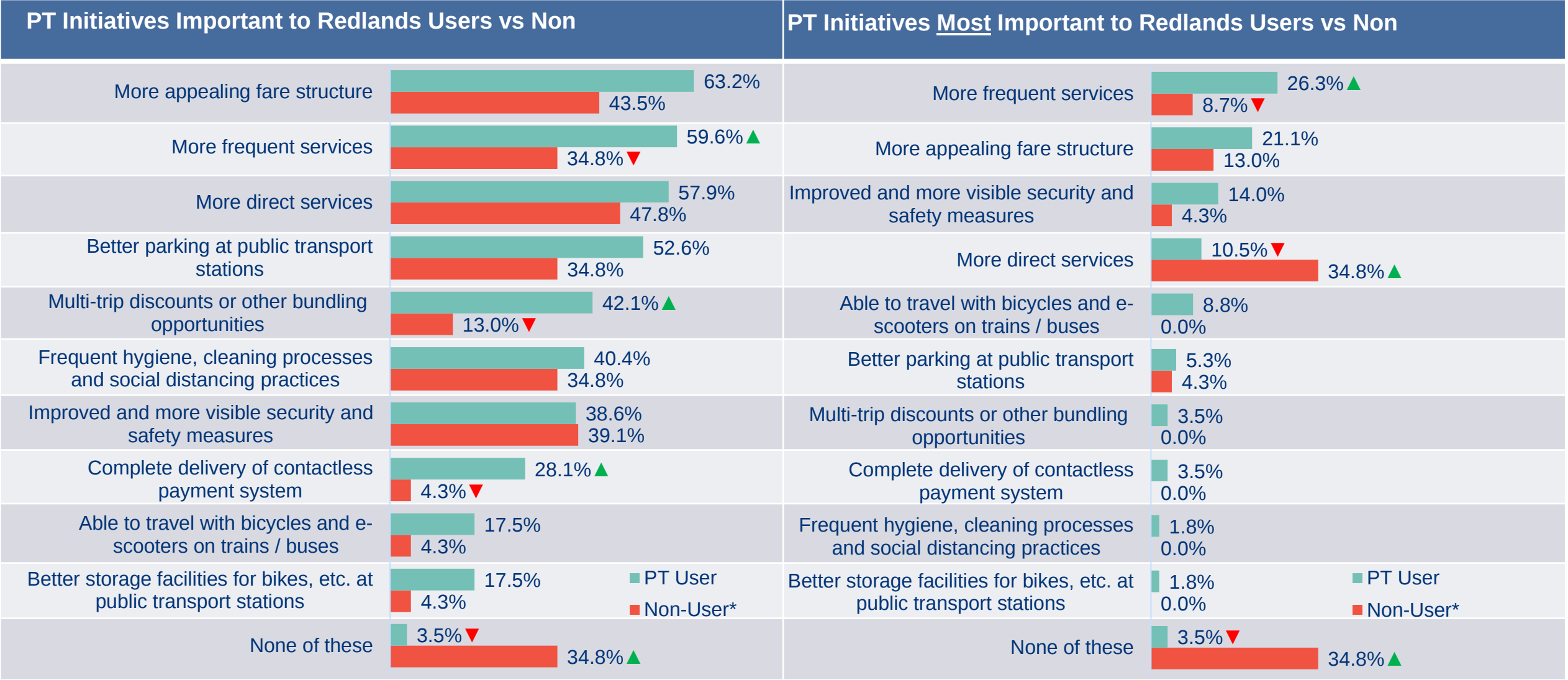
‘Most important’ denotes the % of times an initiative is ranked 1st amongst the initiatives.

Source: Public Transport Survey 2023. Total n=1221. Redlands residents n=80.

56 Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).

▲ ▼ Significant difference at 95% confidence level, Redlands vs QLD.

Service frequency, fare structure and ability to travel with bikes/scooters are of greater importance to PT Users in Redlands. Direct services were of greater importance to non-users.



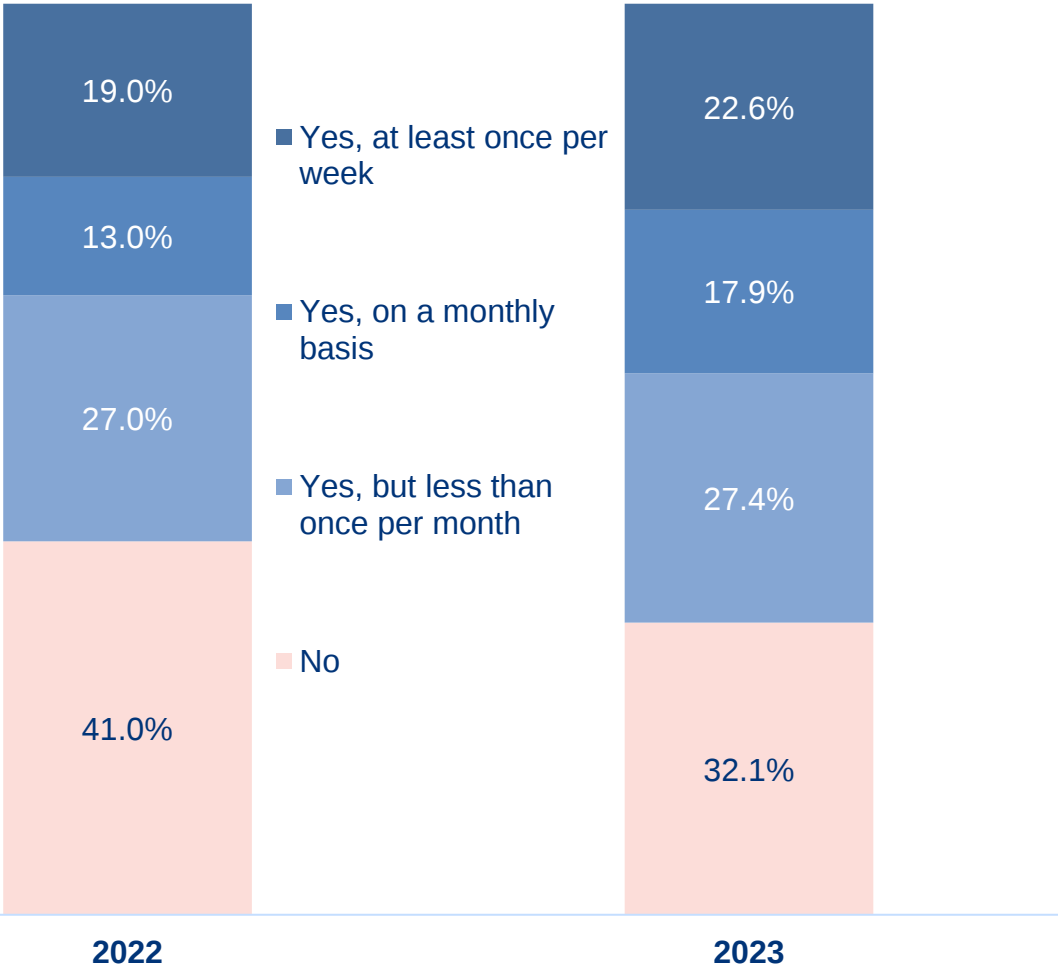


Logan

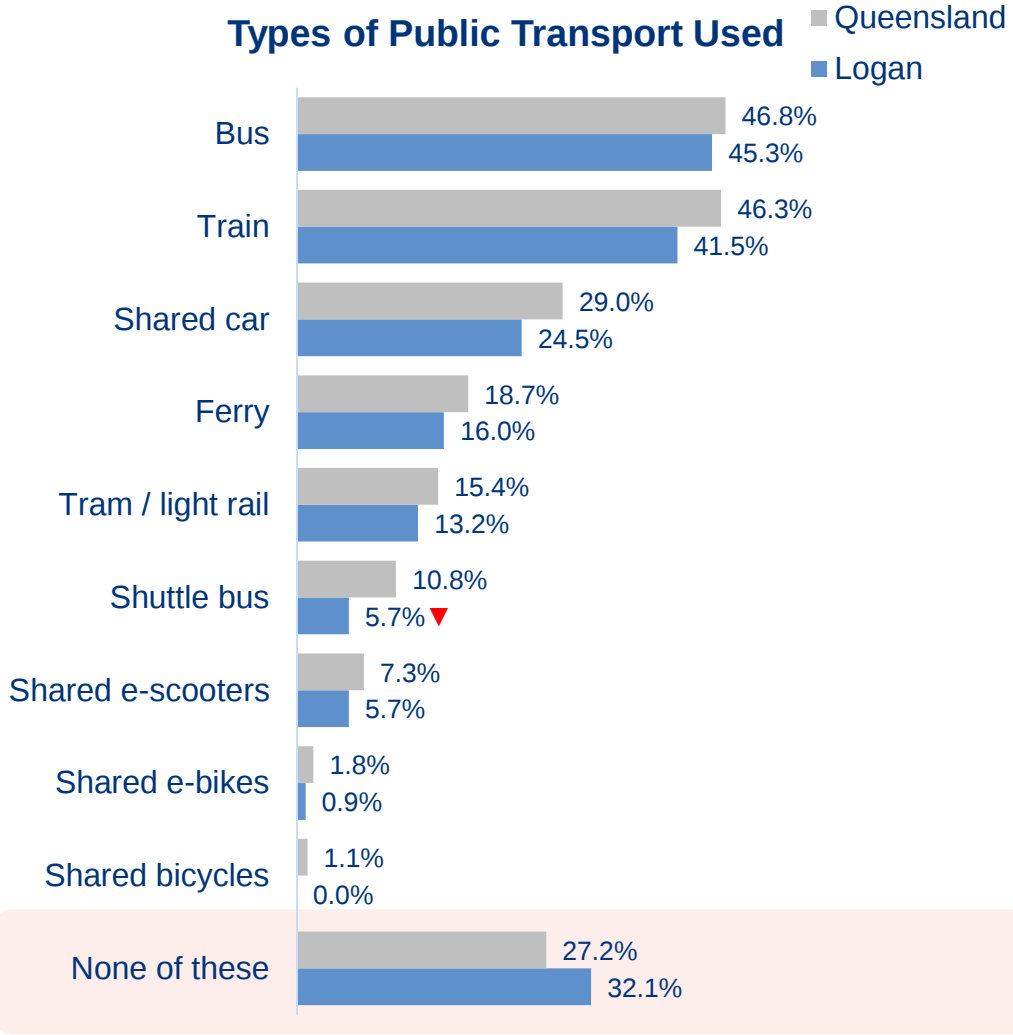
Public Transport User Profile

Logan residents exhibit slightly lower Public Transport Usage relative to the state-wide average. Usage of all forms of PT was lower in Logan, significantly so in terms of Shuttle bus use. Nevertheless, non-usage dropped somewhat since 2022.

Do Logan Residents Use Public Transport?



Types of Public Transport Used

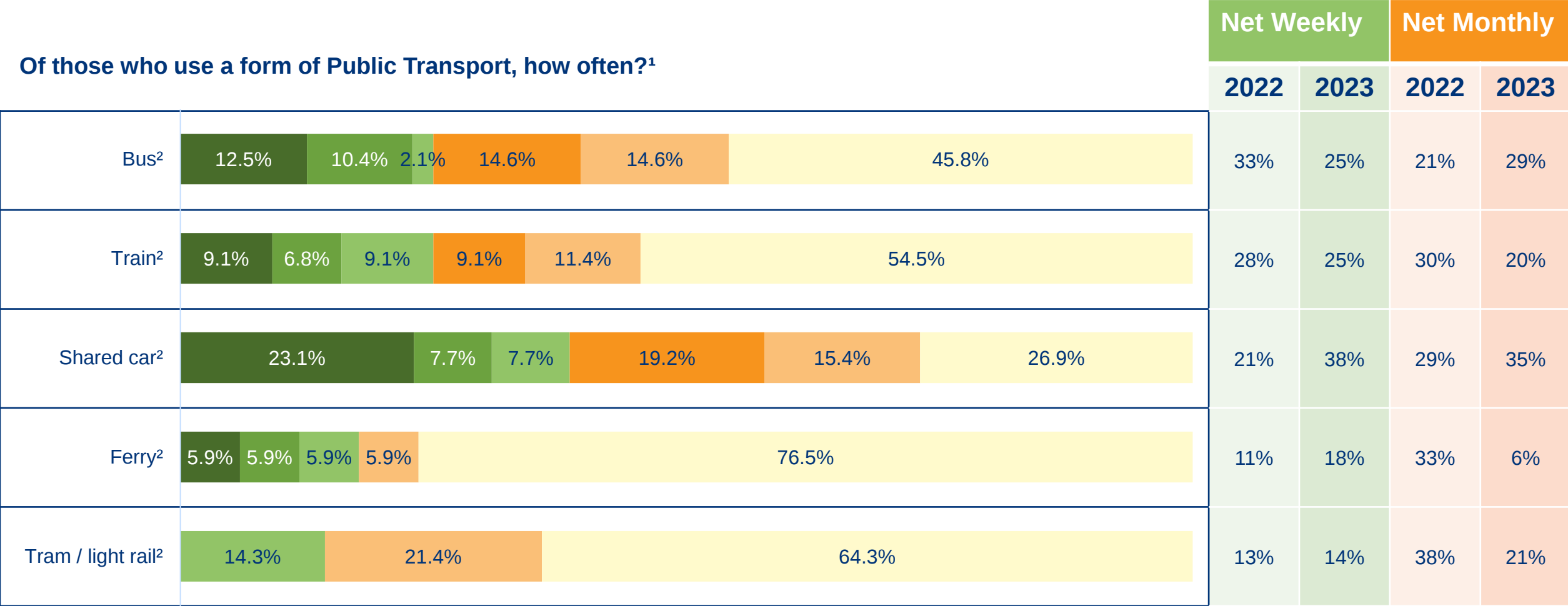


Source: Public Transport Survey 2023. Total n=1221. Logan residents n=106 (2022 Logan residents n=100)
 Questions: Q1. Please indicate if you have used any of these forms of public transport at any time in the past 12 months. PT1. Please indicate how often you use these public transport options...

▲ ▼ Significant difference at 95% confidence level, Logan vs QLD

In Logan, over half of Bus users travelled on it at least monthly, while over a third of Shared car users travelled with it at least weekly.

Of those who use a form of Public Transport, how often?¹



- 4 or more days per week

■ 2-3 days per week

■ Once per week

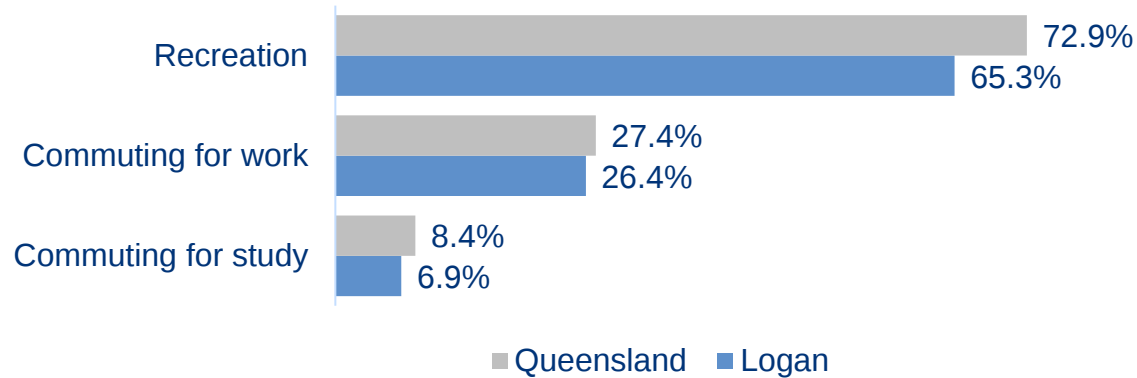
■ Multiple times per month

■ Once per month

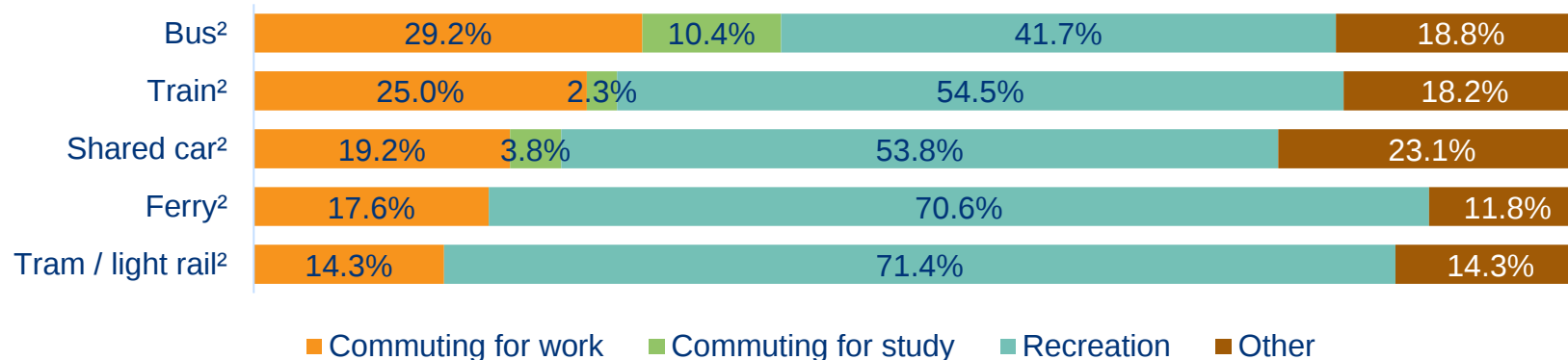
■ Less than once per month

Purposes for using PT in Logan are largely on par with the rest of Queensland, though slightly lower usage for *recreation*. Likelihood of Places of Work/Study to Change, particularly on a daily basis, amongst Logan residents was higher than Queensland overall.

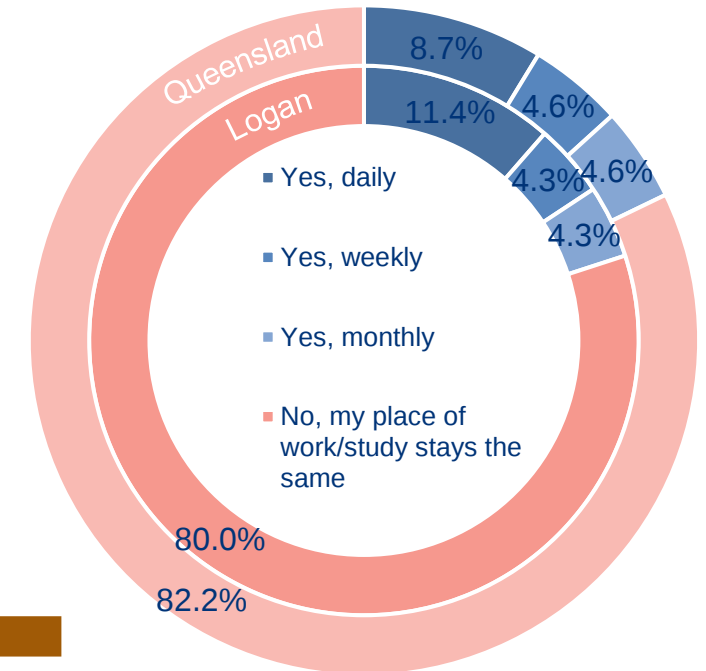
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹



Place of Work/Study Change?*



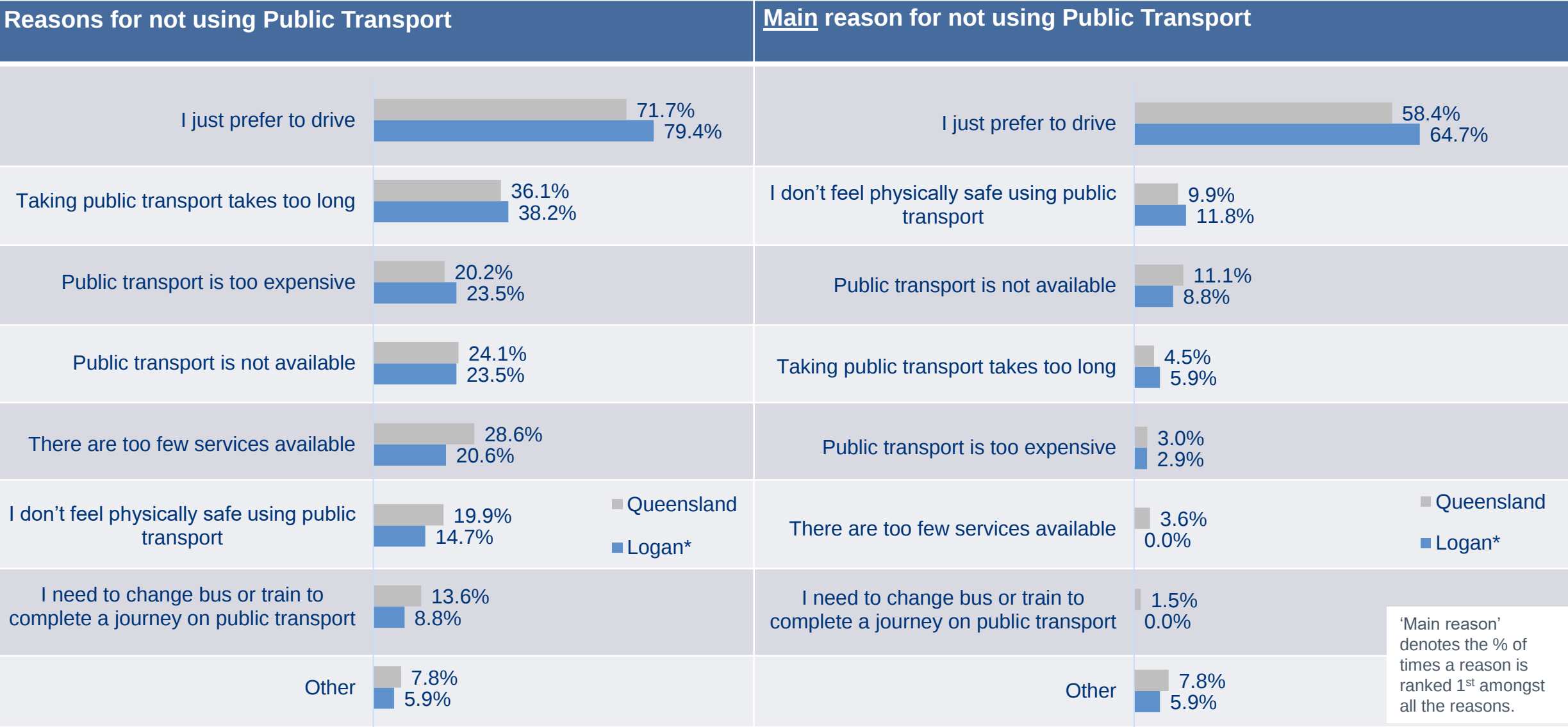
Source: Public Transport Survey 2023. Total n=1221. Logan PT users n=72 (Bus n=48; Train n=44; Shared car n=26; Ferry n=17; Tram/Light Rail n=14; Shuttle bus n=6; e-scooters n=6; e-bikes n=1; Bicycles n=0)

Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?

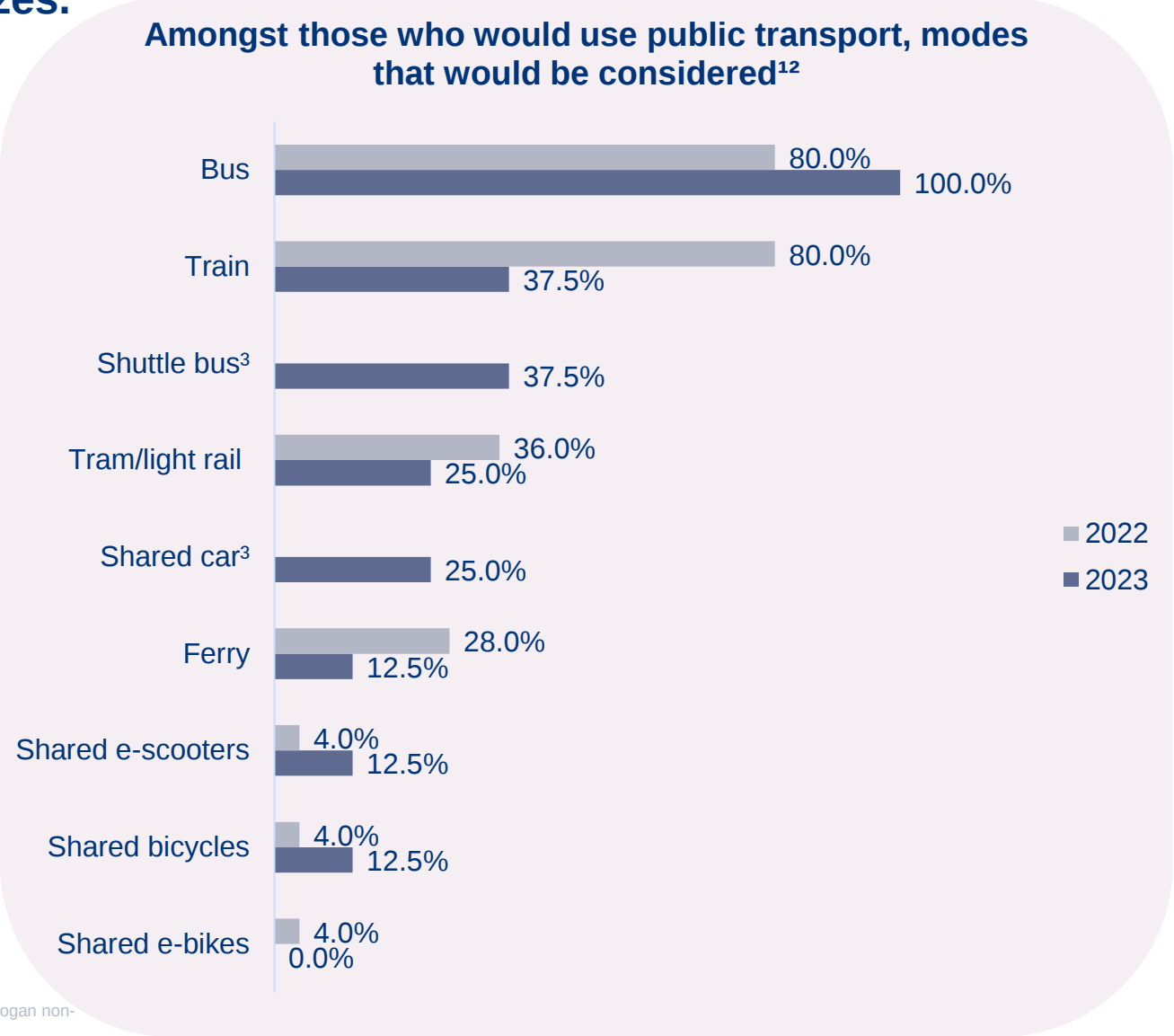
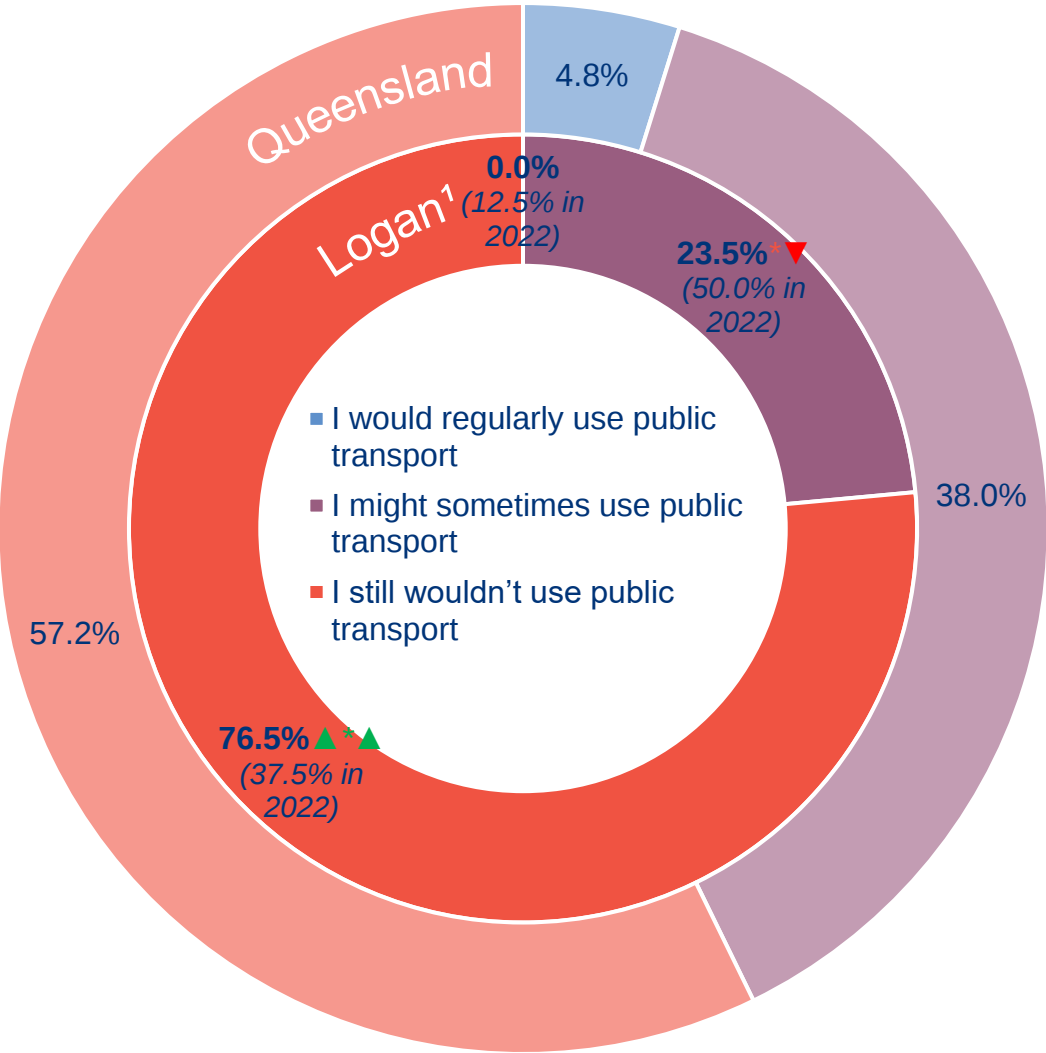
Note: *Asked of all residents who work or study; ¹Forms of transport with <10 responses are not presented here; ²CAUTION: Small base size <50.

▲ ▼ Significant difference at 95% confidence level, Logan vs QLD.

Preference to drive is the most common and the top main reason for Logan residents to not use Public Transport, slightly above the Queensland averages. Amongst relatively more prevalent ‘main reasons’ for non-usage in Logan were *physical safety* and *taking too long*.

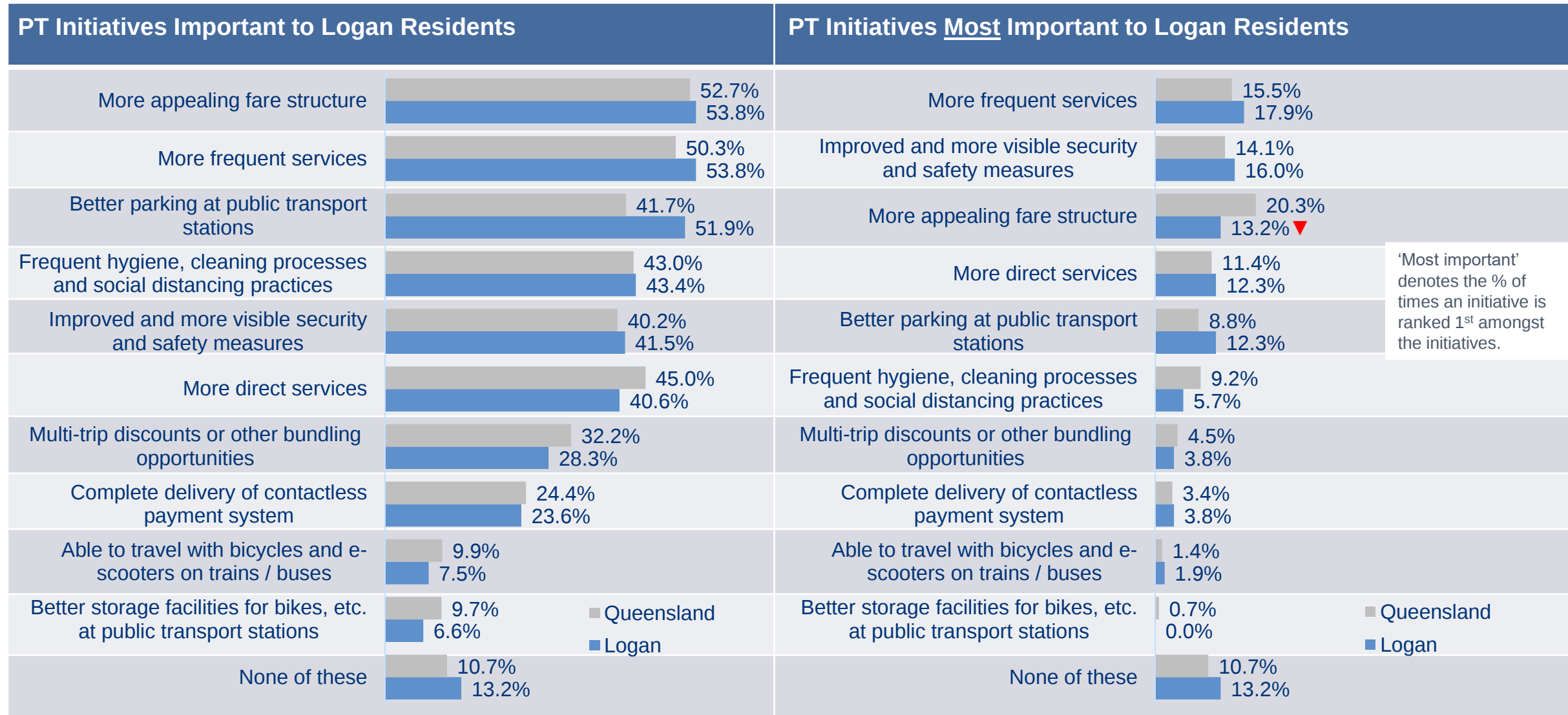


Non-users in Logan were significantly less likely than average to conditionally use Public Transport should their concerns be addressed; indeed no Logan non-users in this sample indicated they would become regular users. Those who *might* use PT fell significantly since last year, however this may be linked to smaller base sizes.



Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Logan non-users n=34, ²Those would use PT n=8) (2022 Logan non-users n=40, ²Those would use PT n=25)
 Questions: NU4. If your concerns with public transport were improved, how likely would you be to use public transport? NU4. If you used any public transport, which of the following modes would you consider?
 Note: ¹CAUTION: Small Base Size <50; ³2022 Shuttle bus and Shared car categories were combined and have not been presented above.

More frequent service was most likely to be the ‘most important’ initiative to Logan residents, while security measures follows closely. Appealing fare structure was significantly less likely to be a ‘most important’ initiative while better parking was more likely.

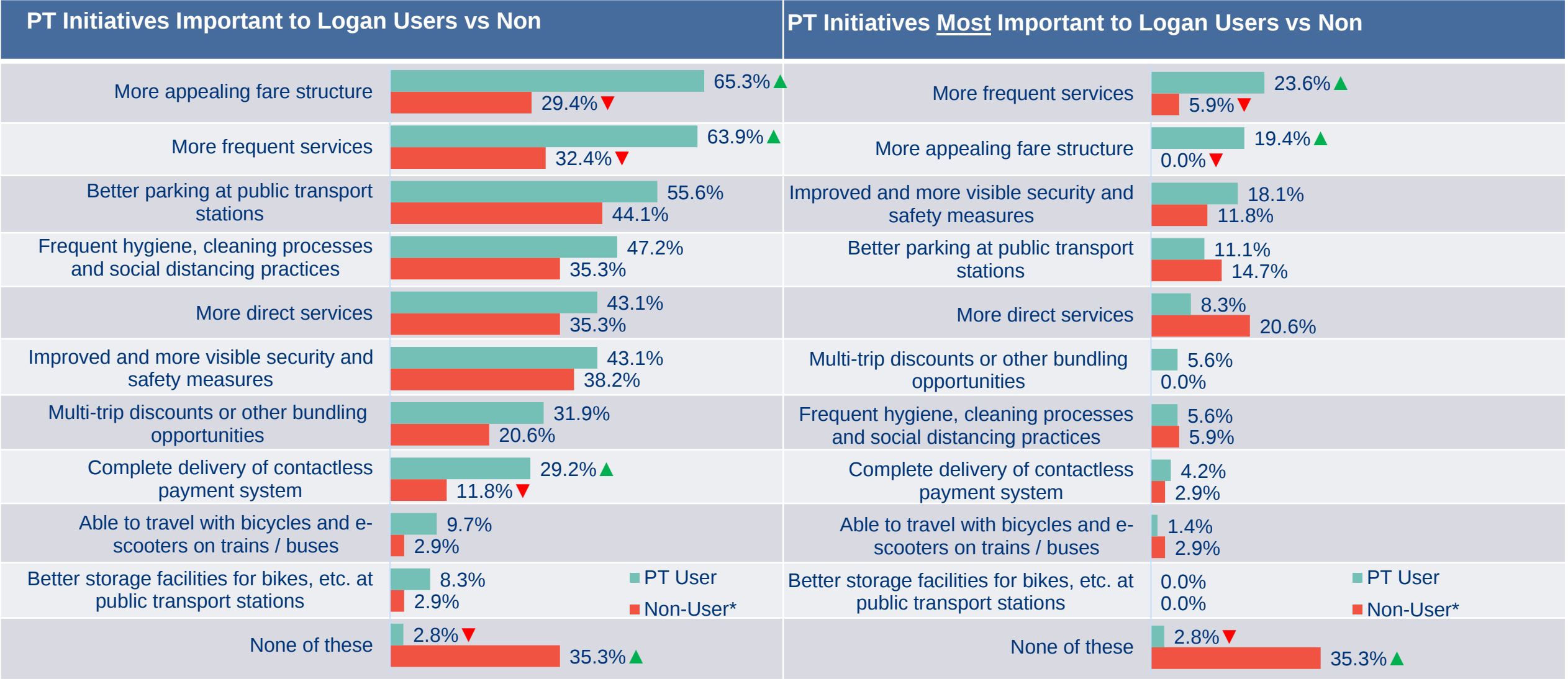


Source: Public Transport Survey 2023. Total n=1221. Logan residents n=106.

64 Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).

▲ ▼ Significant difference at 95% confidence level, Logan vs QLD.

Service frequency, fare structure and security measures were of greater importance to PT Users in Logan. Direct services were of greater importance to non-users.

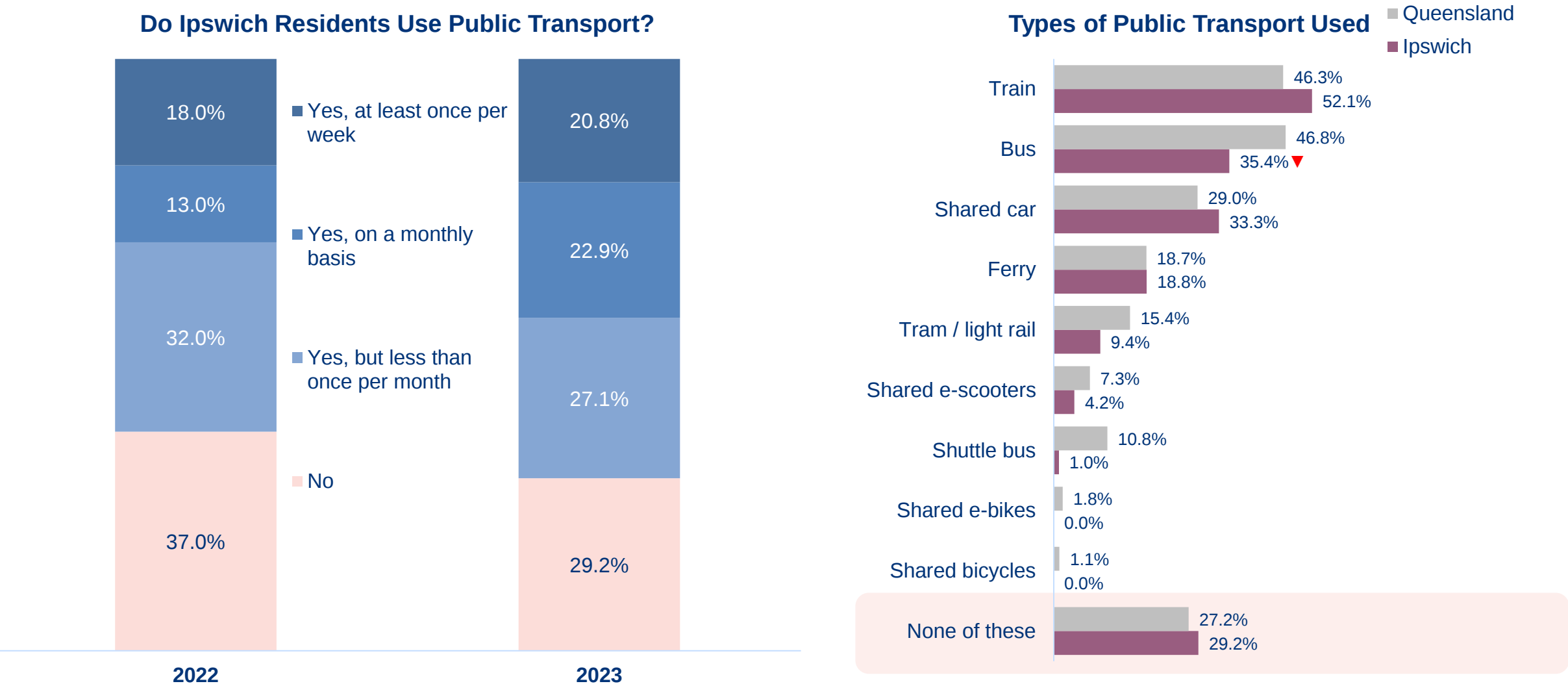


Source: Public Transport Survey 2023. Total n=1221. Logan residents m=106 (PT Users n=72, Non-users n=34)
Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).
Note: *CAUTION: Small Base Size <50

Ipswich

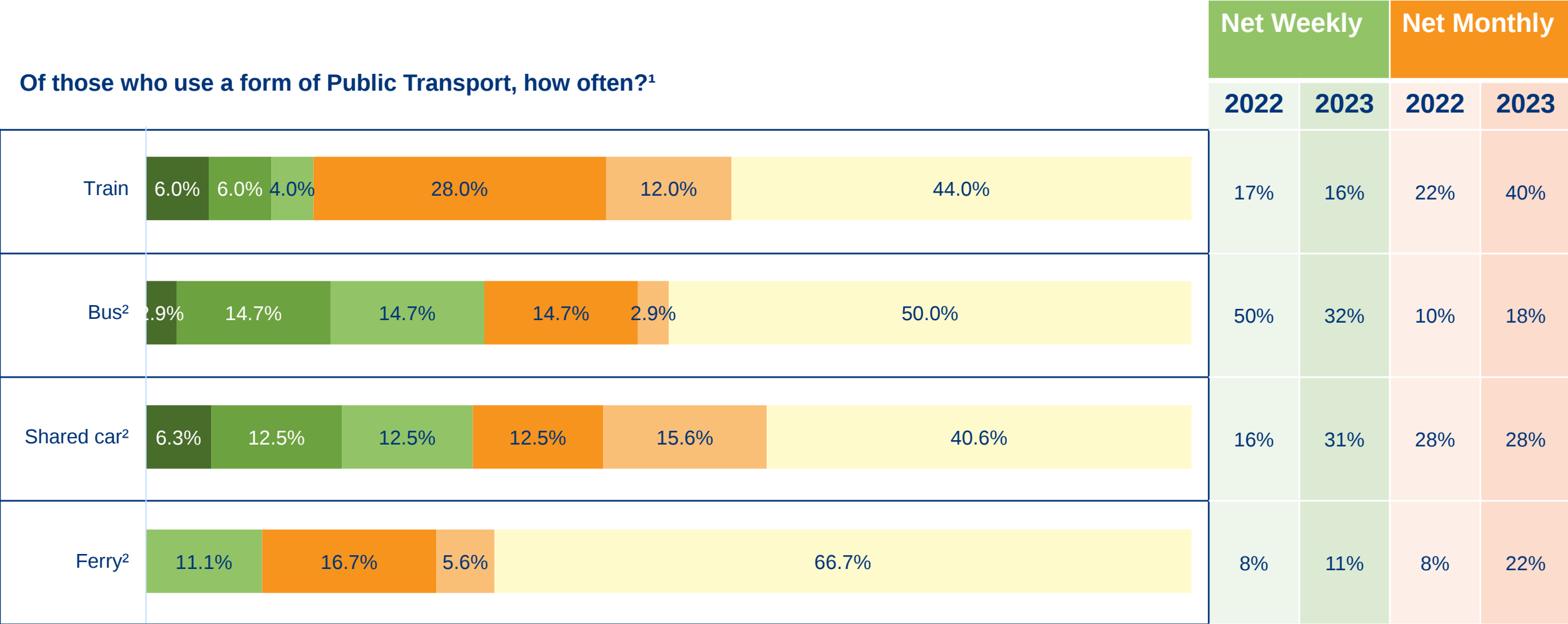
Public Transport User Profile

Ipswich residents exhibit Public Transport usage levels consistent with the state-wide average. Train and Shared car usage was slightly higher, while Bus usage was significantly lower. Similarly, Tram/light rail and Shuttle bus usage was lower here. Nevertheless, non-usage dropped somewhat since 2022.



In Ipswich, 1 in 3 Bus users travelled on it at least weekly, while 40% of Train users use it on a monthly basis.

Of those who use a form of Public Transport, how often?¹



- 4 or more days per week

■ 2-3 days per week

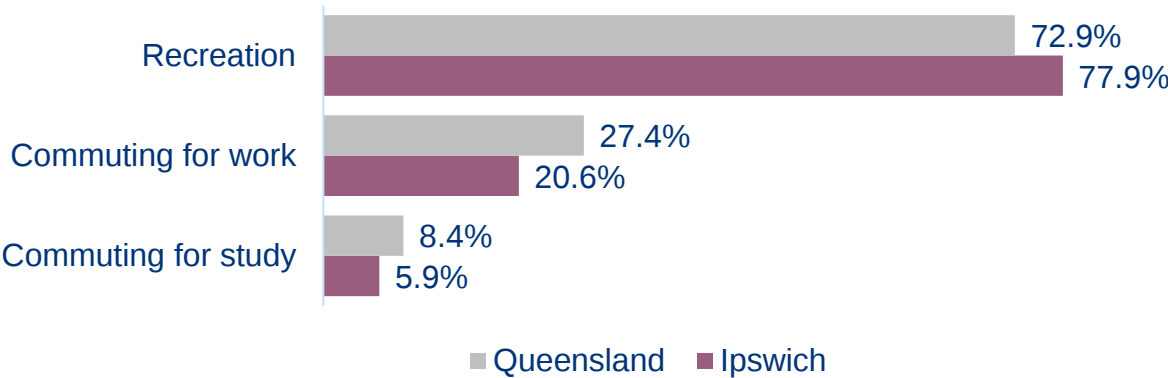
■ Once per week
- Multiple times per month

■ Once per month

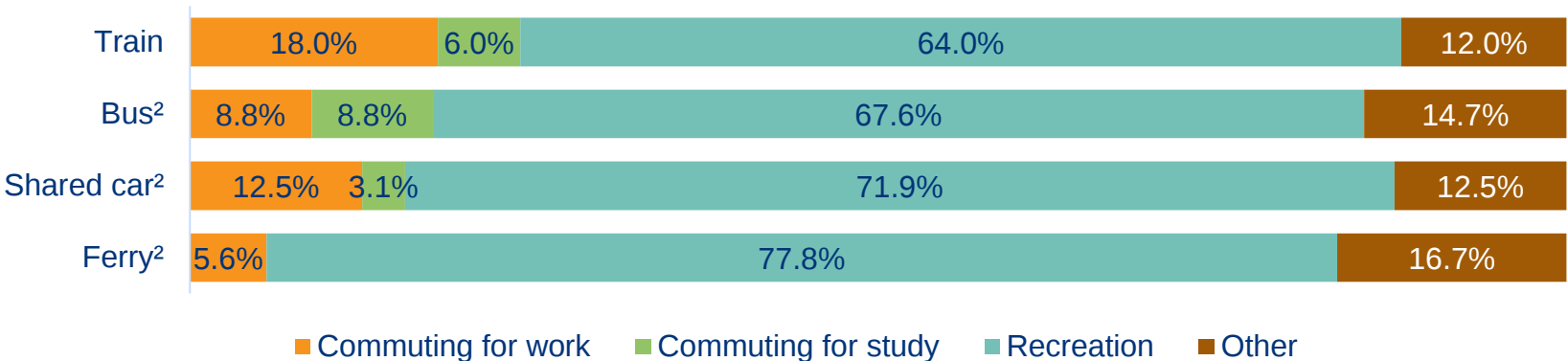
■ Less than once per month

Purposes for using PT in Ipswich are largely on par with the rest of Queensland, though slightly higher usage for *recreation* and lower usage for *commuting for work*. Likelihood of Places of Work/Study to Change amongst Ipswich residents was somewhat lower than Queensland overall.

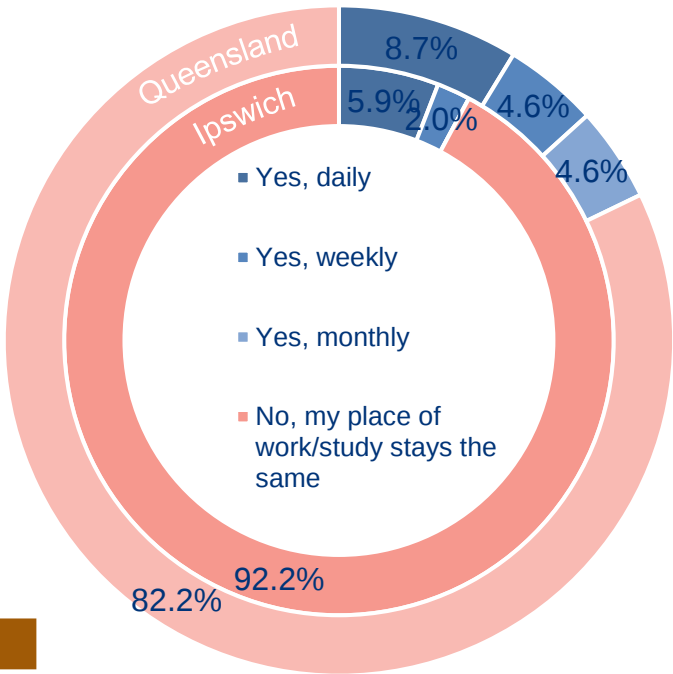
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹

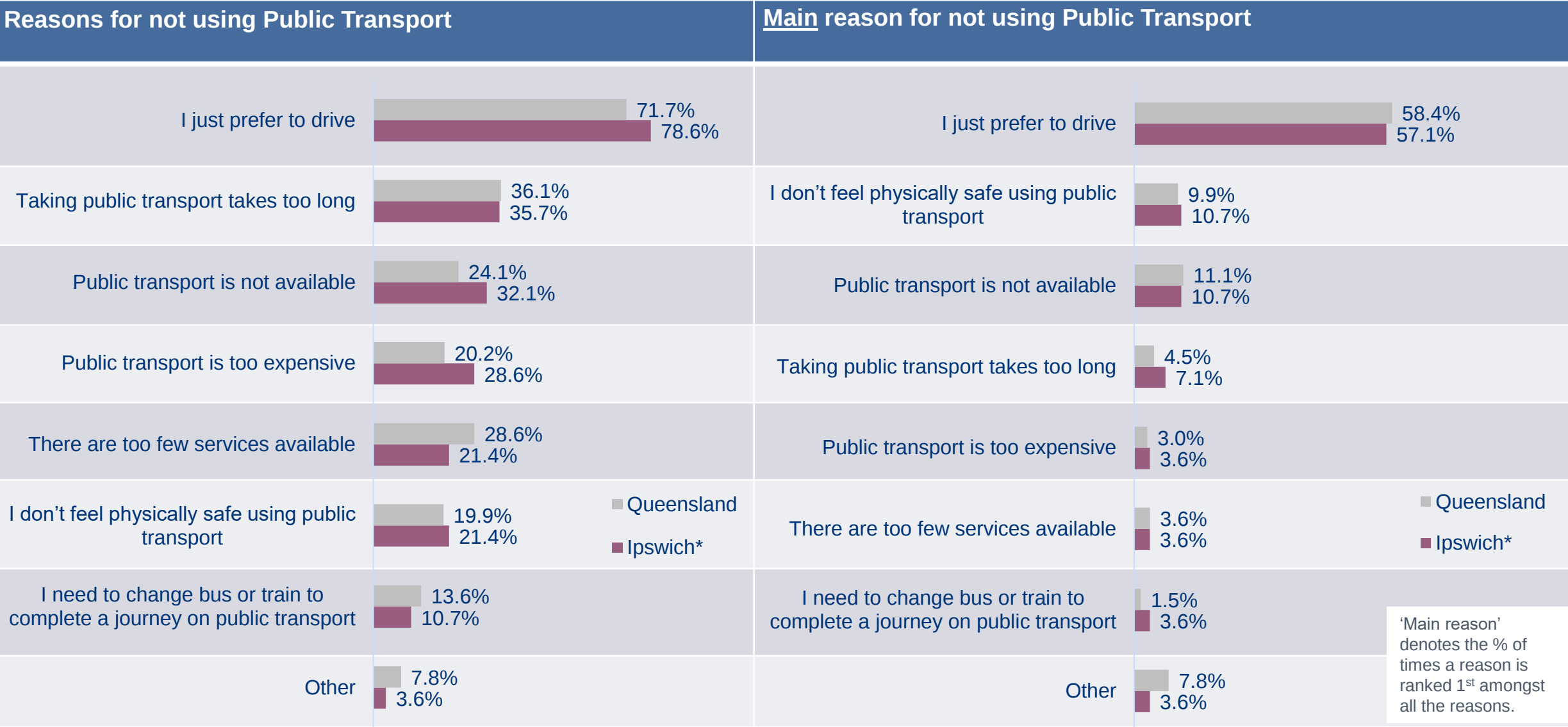


Place of Work/Study Change?*

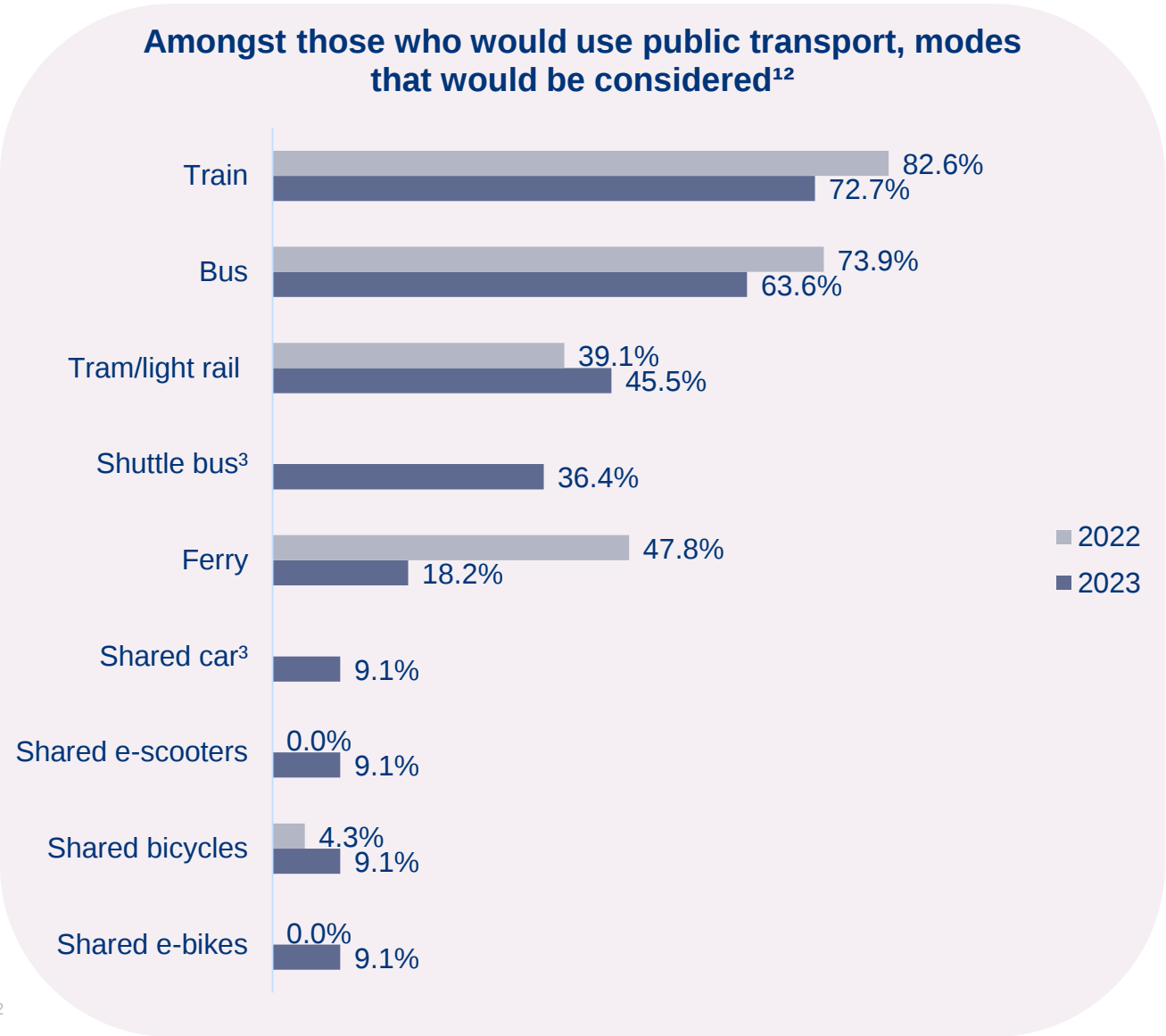
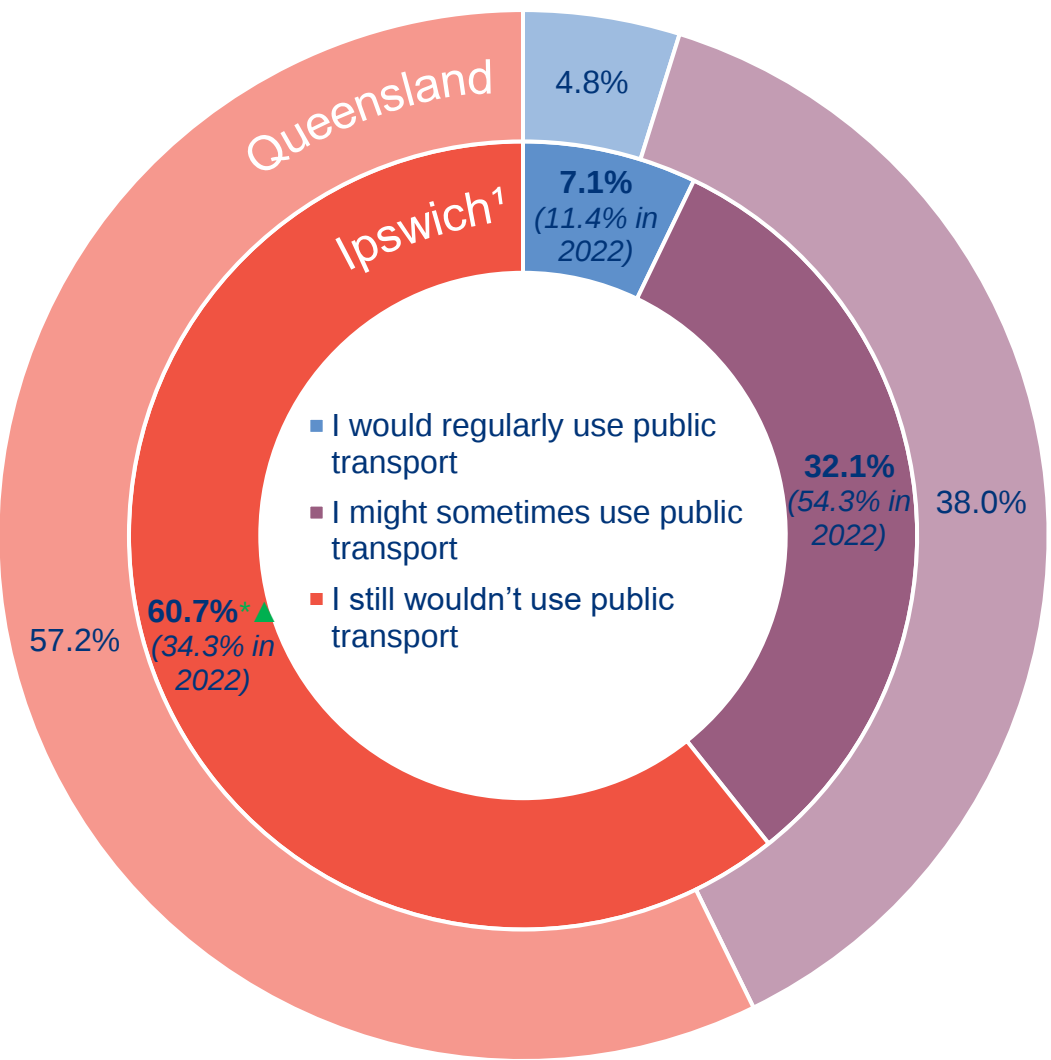


Source: Public Transport Survey 2023. Total n=1221. Ipswich PT users n=68 (Bus n=34; Train n=50; Shared car n=32; Ferry n=18; Tram/Light Rail n=9; Shuttle bus n=1; e-scooters n=4; e-bikes n=0; Bicycles n=0)
Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?
Note: *Asked of all residents who work or study; ¹Forms of transport with <10 responses are not presented here; ²CAUTION: Small base size <50.

Preference to drive is the most common and the top main reason for Ipswich residents to not use Public Transport; while more commonly cited, it is relatively less likely to be a ‘main reason’.
Amongst relatively more prevalent ‘main reasons’ for non-usage in Ipswich were *physical safety* and *taking too long*.

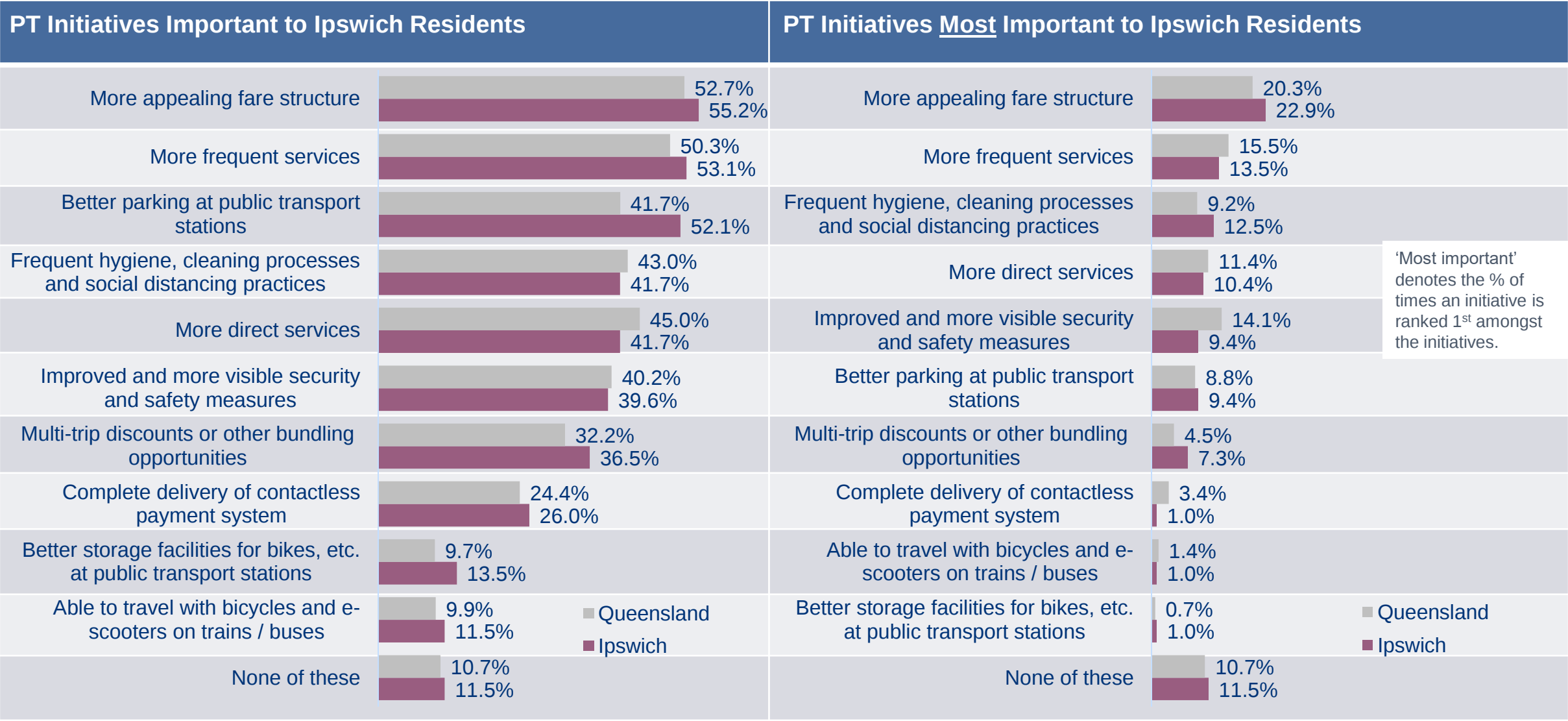


Non-users in Ipswich were slightly less likely than average to conditionally use Public Transport should their concerns be addressed. Those who *still wouldn't* use PT rose significantly since last year, however this is likely linked to smaller base sizes.

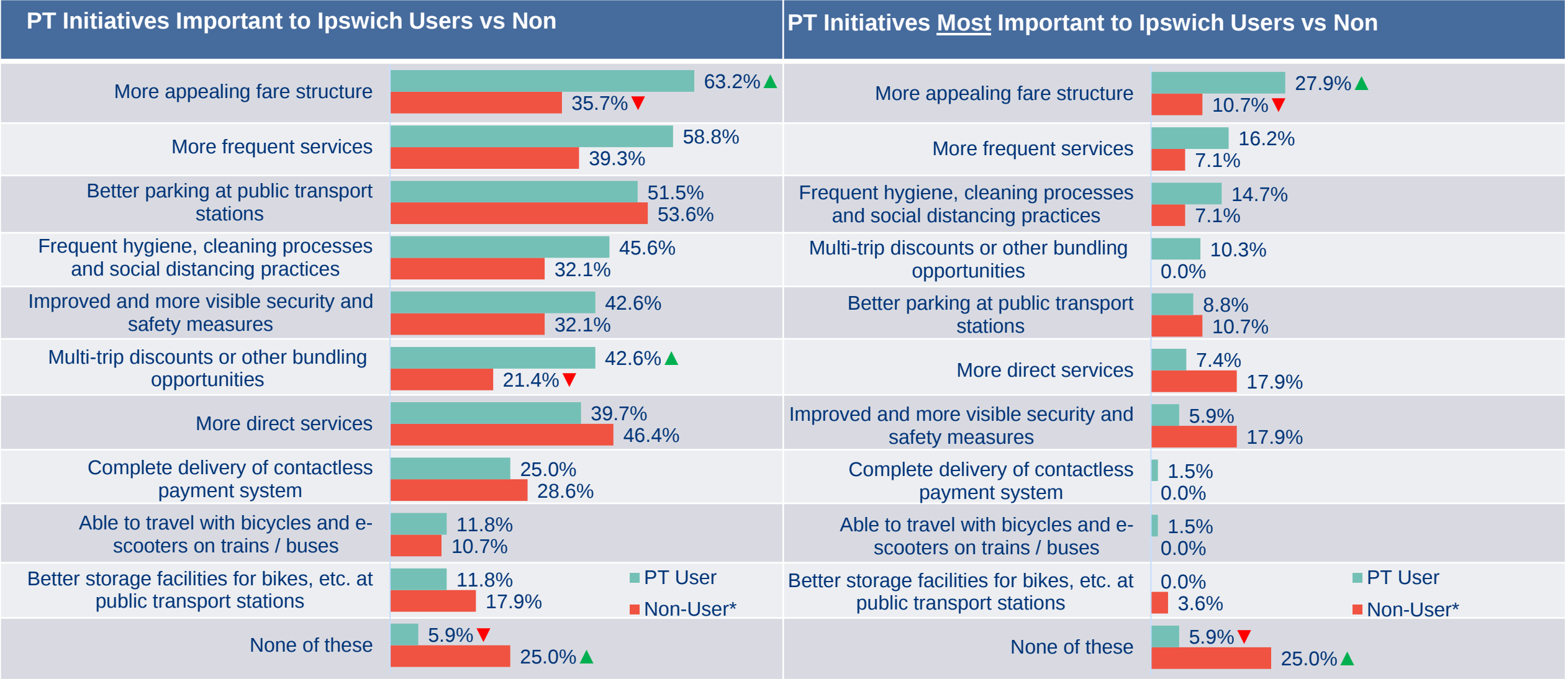


Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Ipswich non-users n=28, ²Those would use PT n=11) (2022 Ipswich non-users n=35, ²Those would use PT n=23)
Questions: NU4. If your concerns with public transport were improved, how likely would you be to use public transport? NU4. If you used any public transport, which of the following modes would you consider?
Note: ¹CAUTION: Small Base Size <50; ³2022 Shuttle bus and Shared car categories were combined and have not been presented above.

Fare structure was most likely to be the ‘most important’ initiative to Ipswich residents, while service frequency follows closely. Frequent hygiene, better parking and multi-trip discounts were relatively more likely to be a ‘most important’ initiative.



Fare structure, service frequency and frequent hygiene were of greater importance to PT Users in Ipswich. Direct services and security measures were of greater importance to non-users.



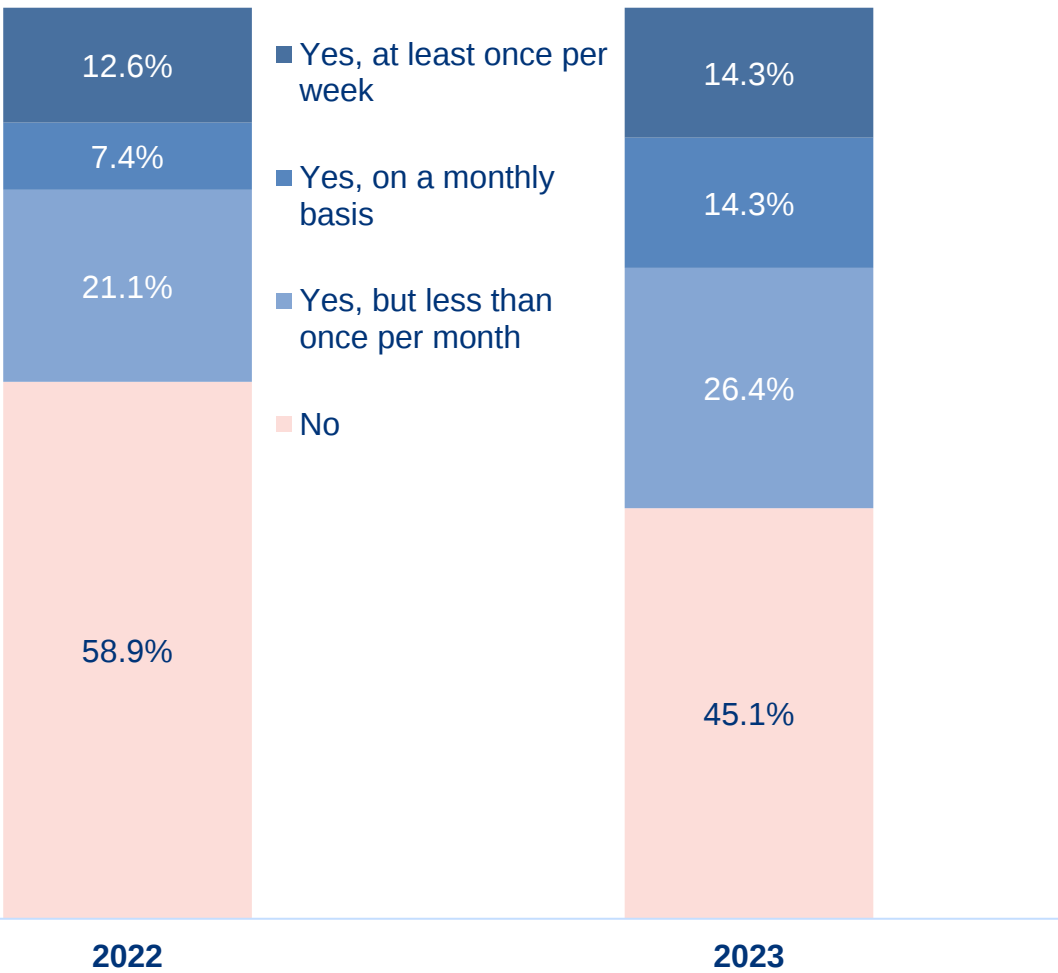
Source: Public Transport Survey 2023. Total n=1221. Ipswich residents m=96 (PT Users n=68, Non-users n=28)
Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).
Note: *CAUTION: Small Base Size <50

Toowoomba

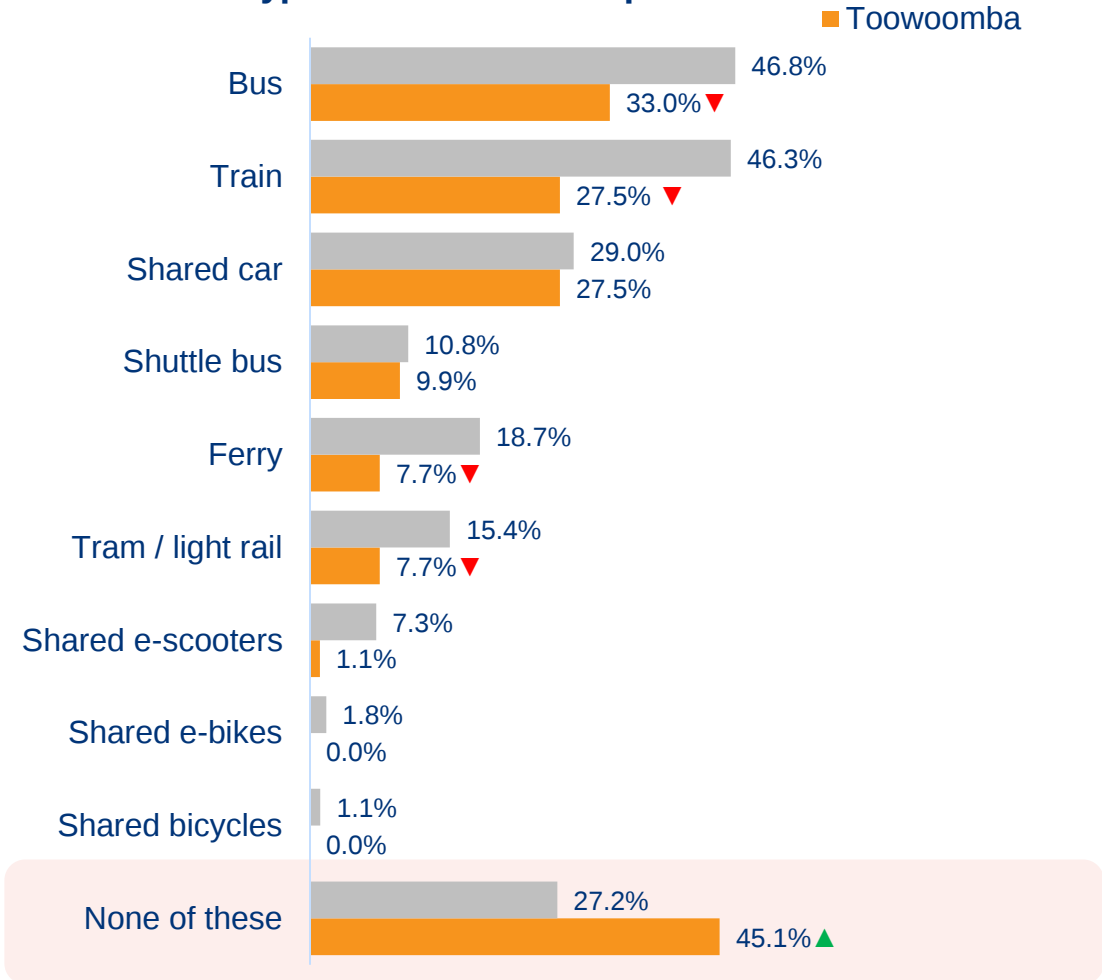
Public Transport User Profile

Toowoomba residents exhibit Public Transport usage levels significantly lower than the state-wide average. Bus, Train, Ferry and Tram/light rail usage were significantly lower, while Shared car and Shuttle bus usage was consistent. Nevertheless, non-usage dropped somewhat since 2022.

Do Toowoomba Residents Use Public Transport?

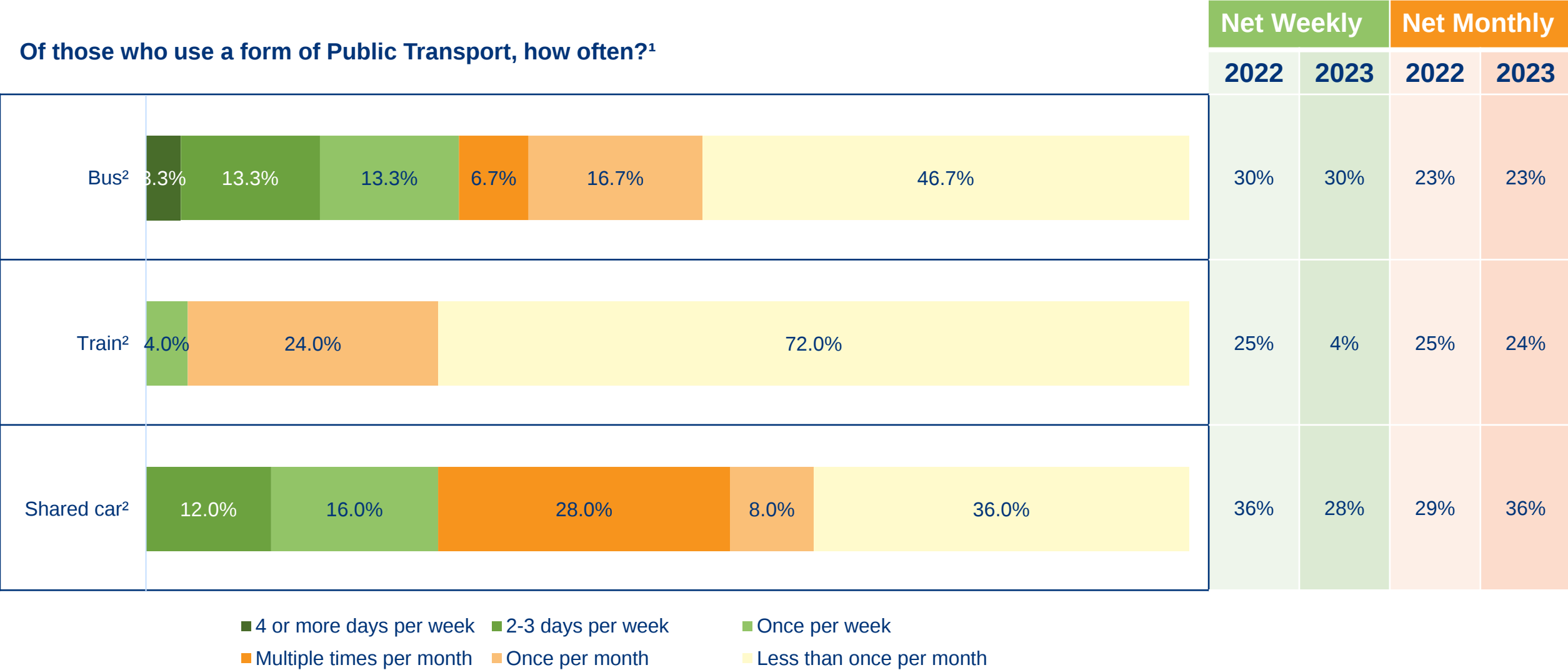


Types of Public Transport Used



In Toowoomba, 1 in 3 Bus users travelled on it at least weekly, while a quarter of Train users use it on a monthly basis.

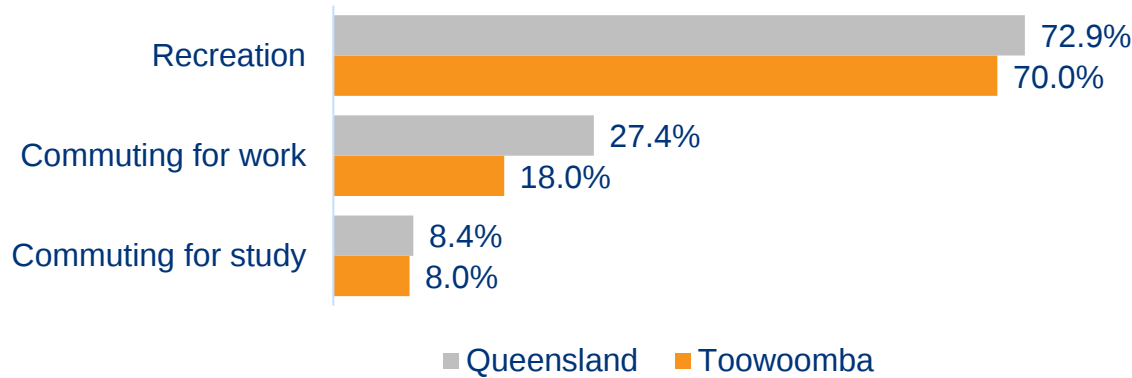
Of those who use a form of Public Transport, how often?¹



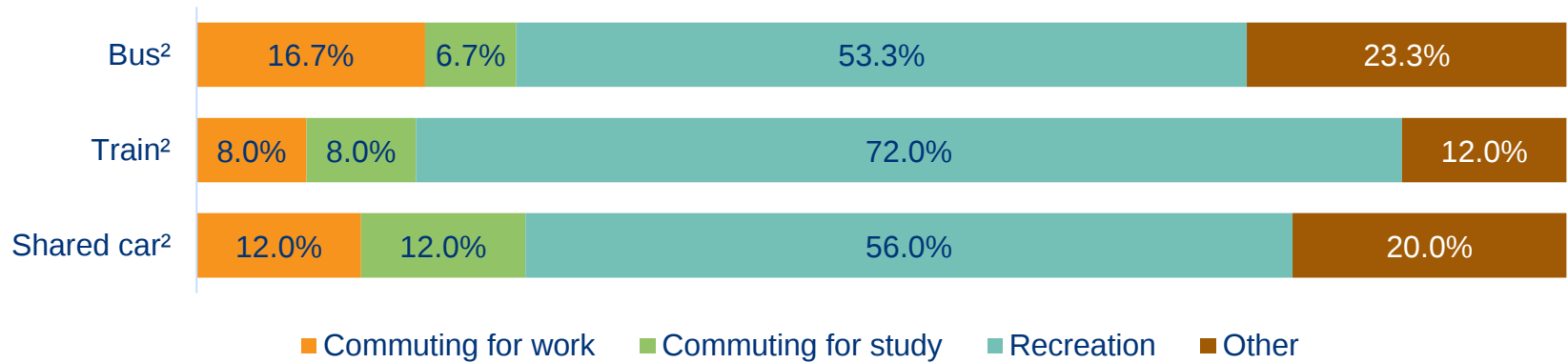
Source: Public Transport Survey 2023. Total n=1221. Toowoomba PT users n=50 (Bus n=30; Train n=25, Shared car n=25; Ferry n=7; Tram/Light Rail n=7, Shuttle bus n=9, e-scooters n=1, e-bikes n=0, Bicycles n=0)
Questions: PT1. Please indicate how often you use these public transport options...
Note: ¹Forms of transport with <10 responses are not presented here ²CAUTION: Small base size <50.

Purposes for using PT in Toowoomba are largely on par with the rest of Queensland, though somewhat lower usage for *commuting for work*. Likelihood of Places of Work/Study to Change amongst Toowoomba residents was on par with Queensland overall.

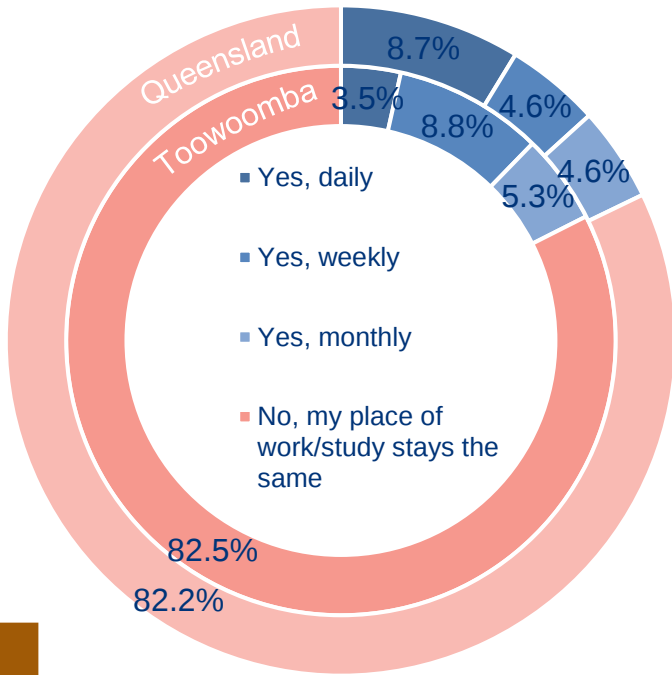
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹



Place of Work/Study Change?*



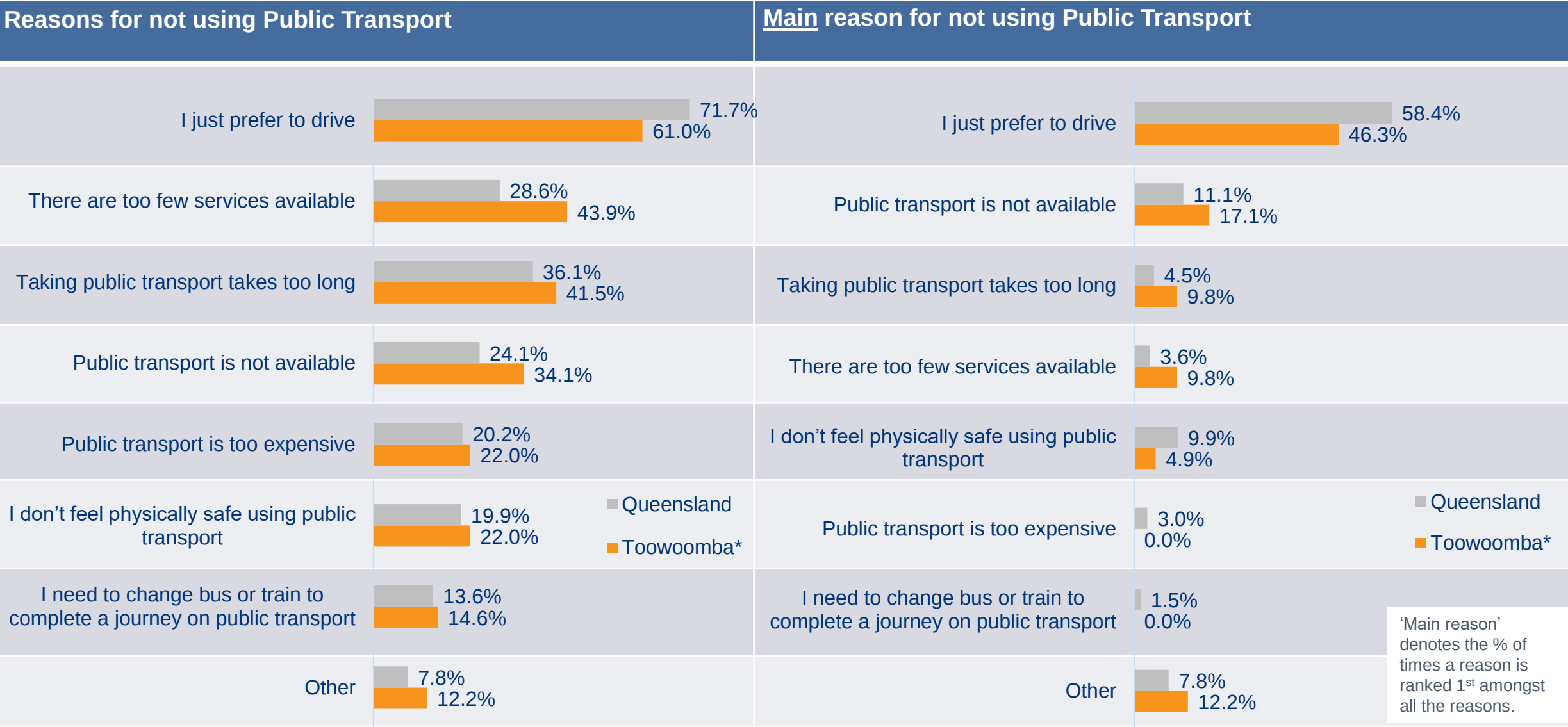
Source: Public Transport Survey 2023. Total n=1221. Toowoomba PT users n=50 (Bus n=30; Train n=25; Shared car n=25; Ferry n=7; Tram/Light Rail n=7; Shuttle bus n=9; e-scooters n=1; e-bikes n=0; Bicycles n=0)

Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?

Note: ¹Asked of all residents who work or study; ²Forms of transport with <10 responses are not presented here; ³CAUTION: Small base size <50.

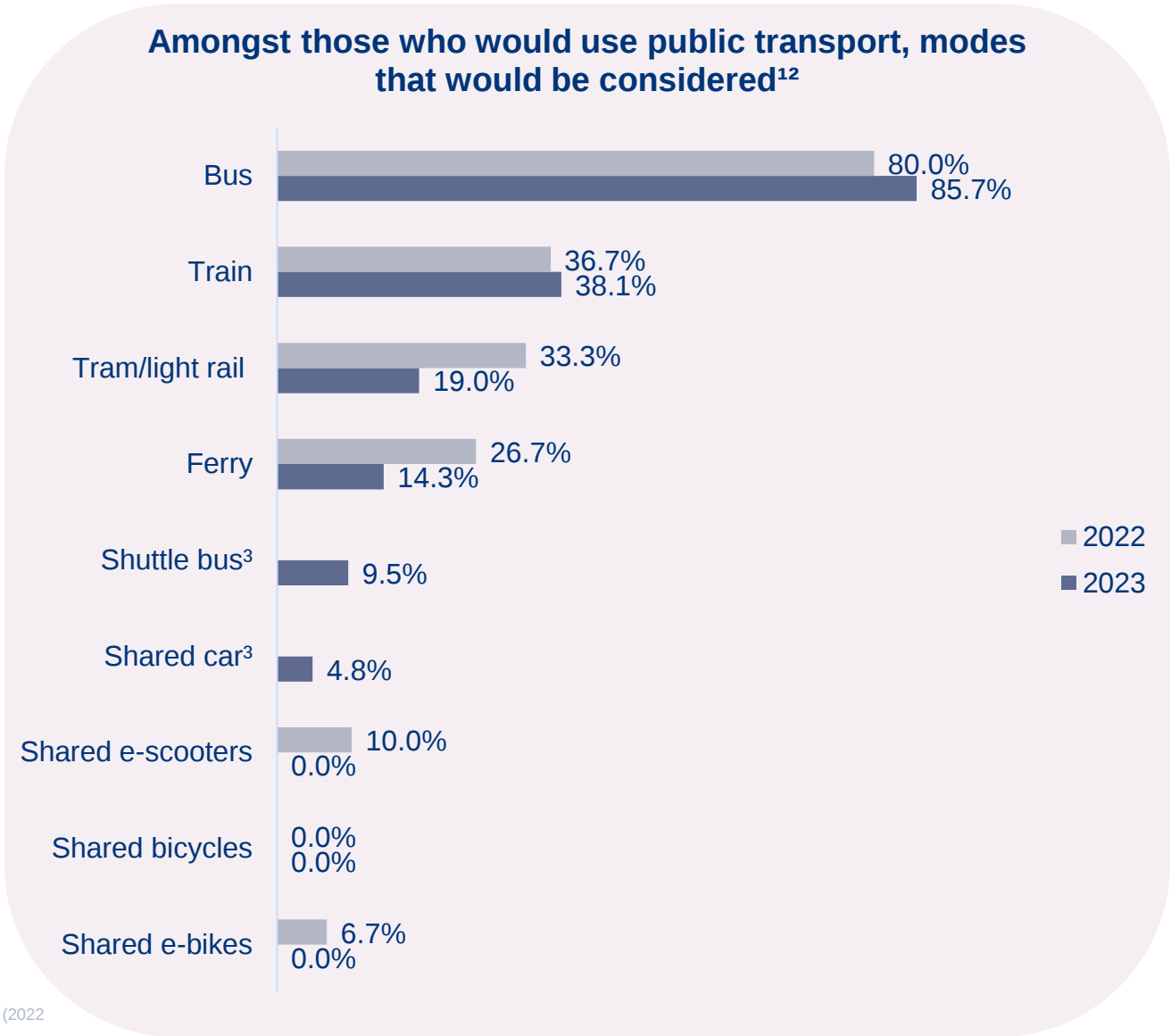
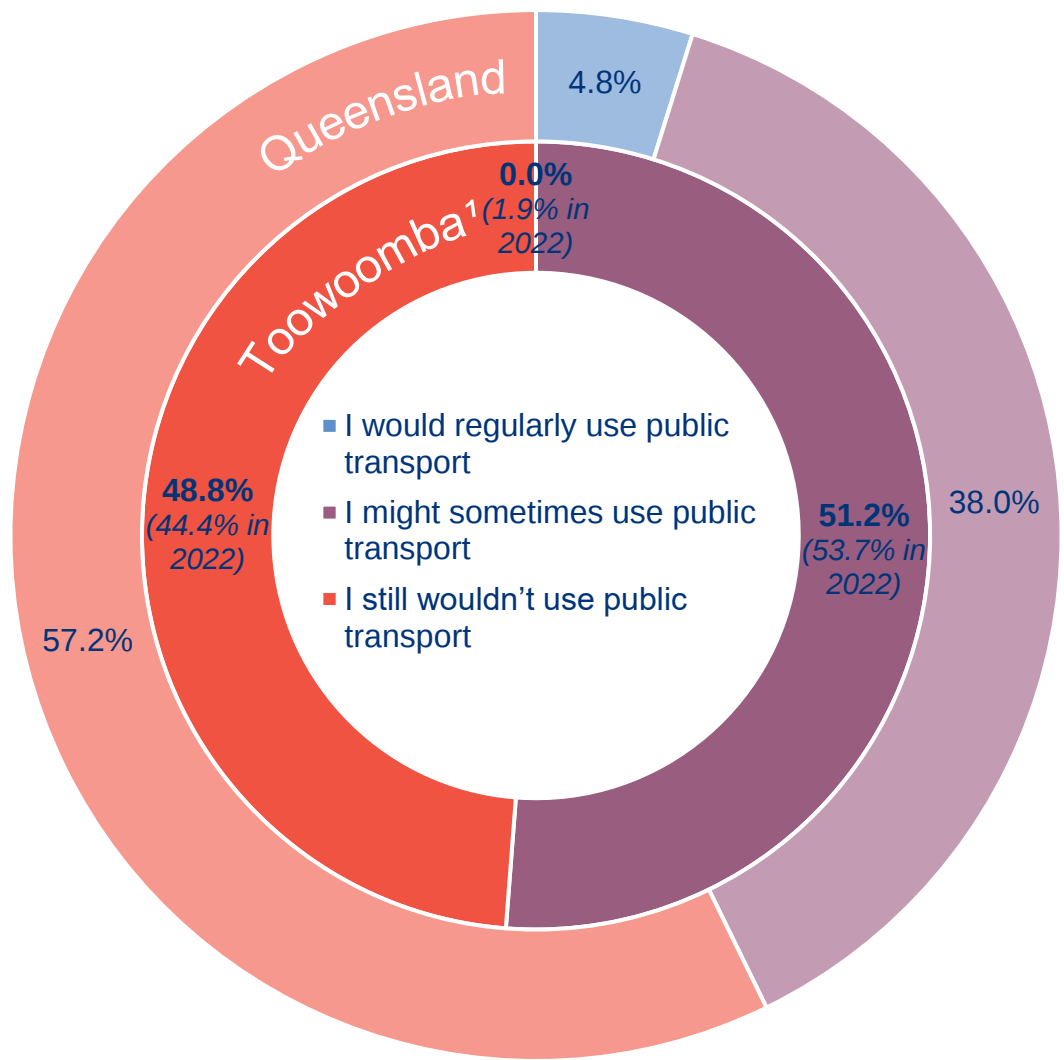
▲ ▼ Significant difference at 95% confidence level, Toowoomba vs QLD.

Preference to drive is the most common and the top main reason for Toowoomba residents to not use Public Transport; while more commonly cited, it is relatively less likely to be a ‘main reason’. Notably, *too few services, unavailability of PT, and takes too long* were cited both more commonly and as main reasons for non-usage in Toowoomba.



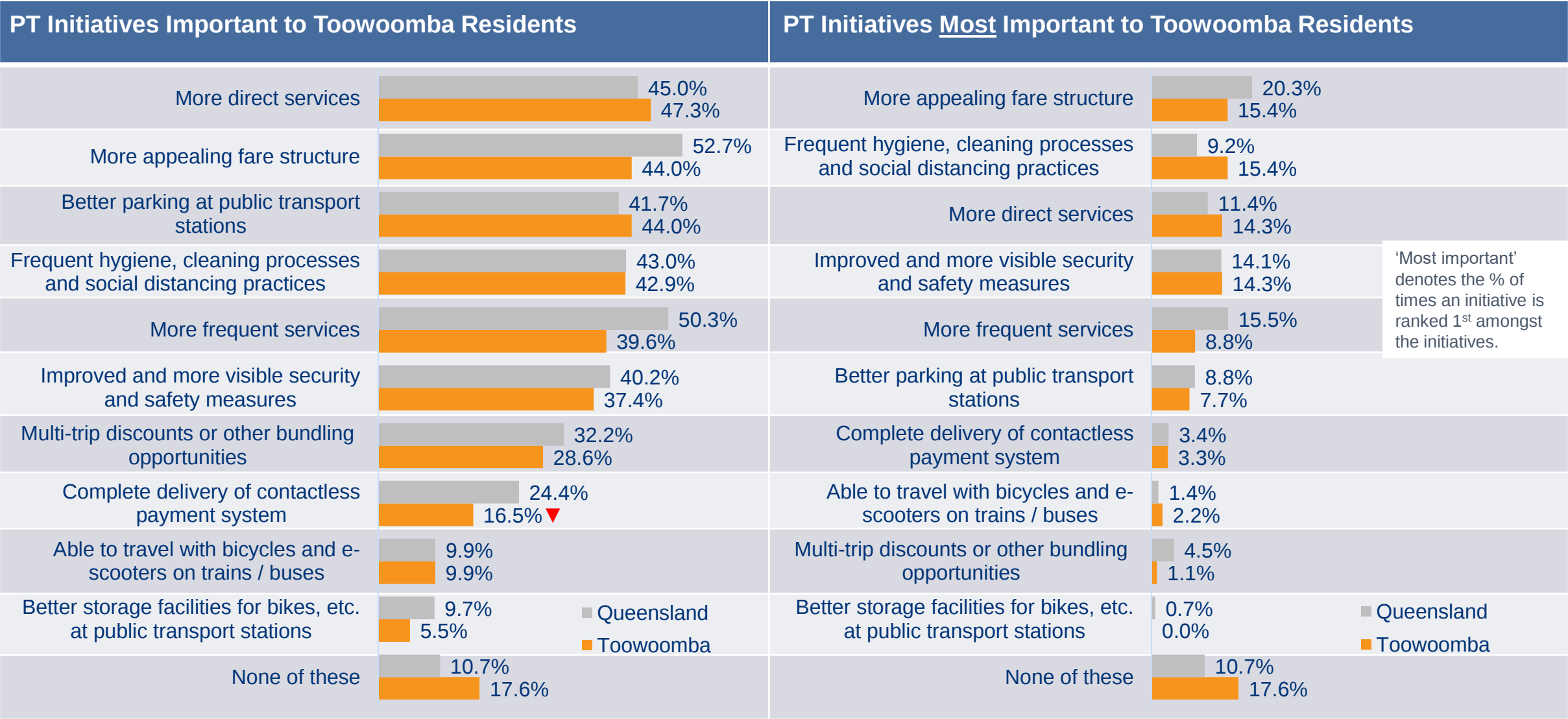
Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Toowoomba non-users n=41)
Questions: NU2_1. Please select which of these options describe why you do not use public transport. NU2_2 Please rank the reasons you have selected, from most important (top) to least important (bottom).
Note: *CAUTION: Small Base Size <50.

Toowoomba non-users were approximately equally split between *still wouldn't* and *might use* should their concerns be addressed. Sentiment among non-users remains consistent with last year's results.

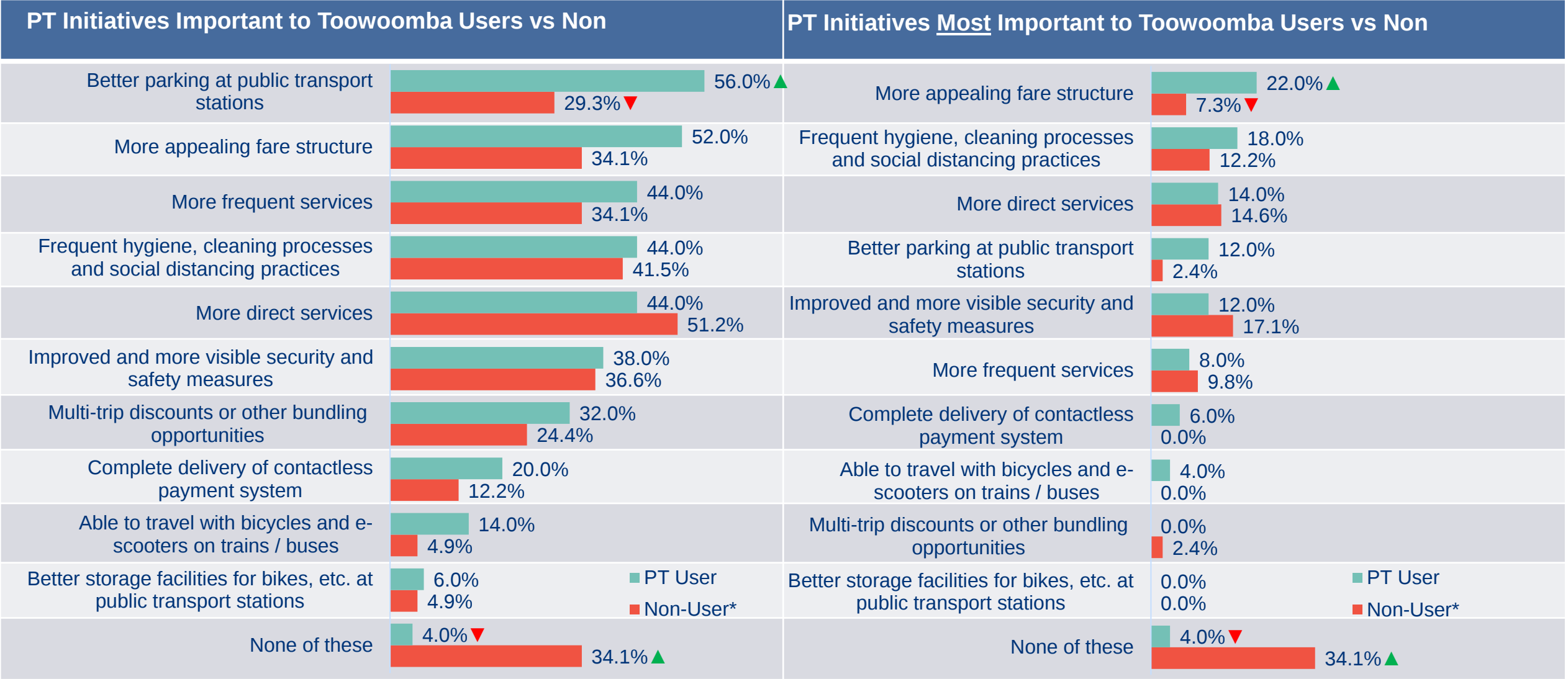


Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Toowoomba non-users n=41, ²Those would use PT n=21) (2022 Toowoomba non-users n=54, ²Those would use PT n=30)
Questions: NU4. If your concerns with public transport were improved, how likely would you be to use public transport? NU4. If you used any public transport, which of the following modes would you consider?
Note: ¹CAUTION: Small Base Size <50; ²2022 Shuttle bus and Shared car categories were combined and have not been presented above.

Fare structure and frequent hygiene were most likely to be the ‘most important’ initiatives to Toowoomba residents, while *direct services* follows closely. *Contactless payments* were significantly less likely to be cited, while feeling that ‘none of these’ are important was relatively higher.



Fare structure, Frequent hygiene and Better parking were of greater importance to PT Users in Toowoomba. Security measures, Direct service and Service frequency were of greater importance to non-users.

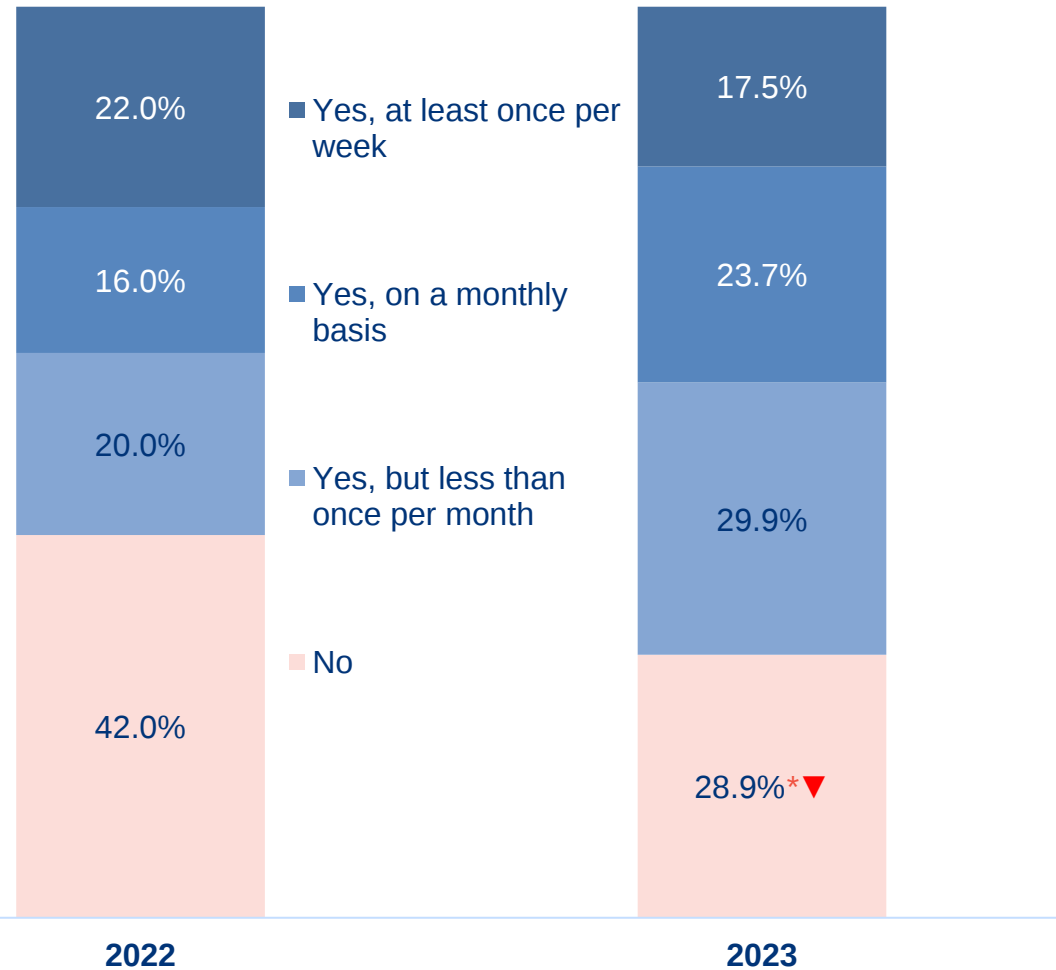


Cairns

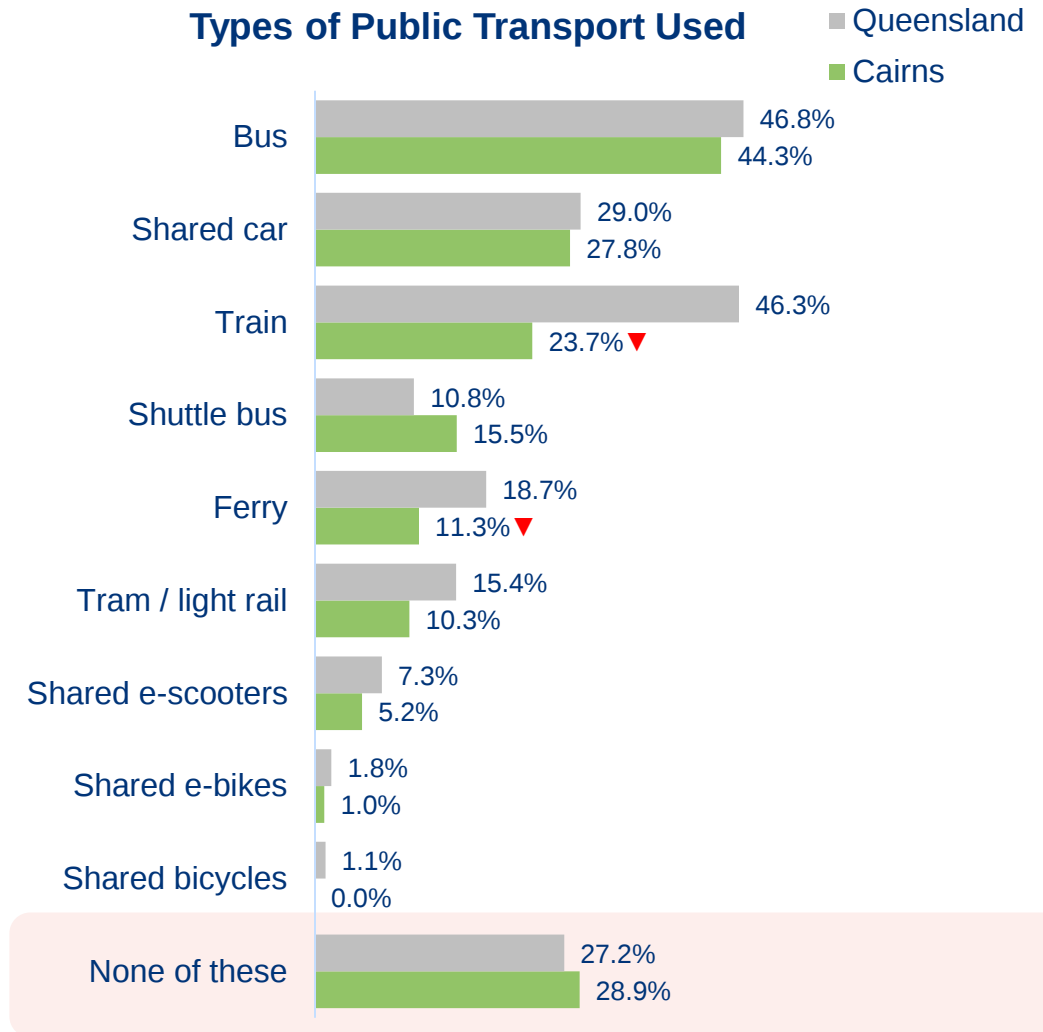
Public Transport User Profile

Cairns residents exhibit Public Transport usage levels consistent with the state-wide average. Only Train and Ferry usage were significantly lower, while Shuttle bus usage was slightly higher. Non-usage saw a significant drop since 2022, however weekly usage also declined.

Do Cairns Residents Use Public Transport?

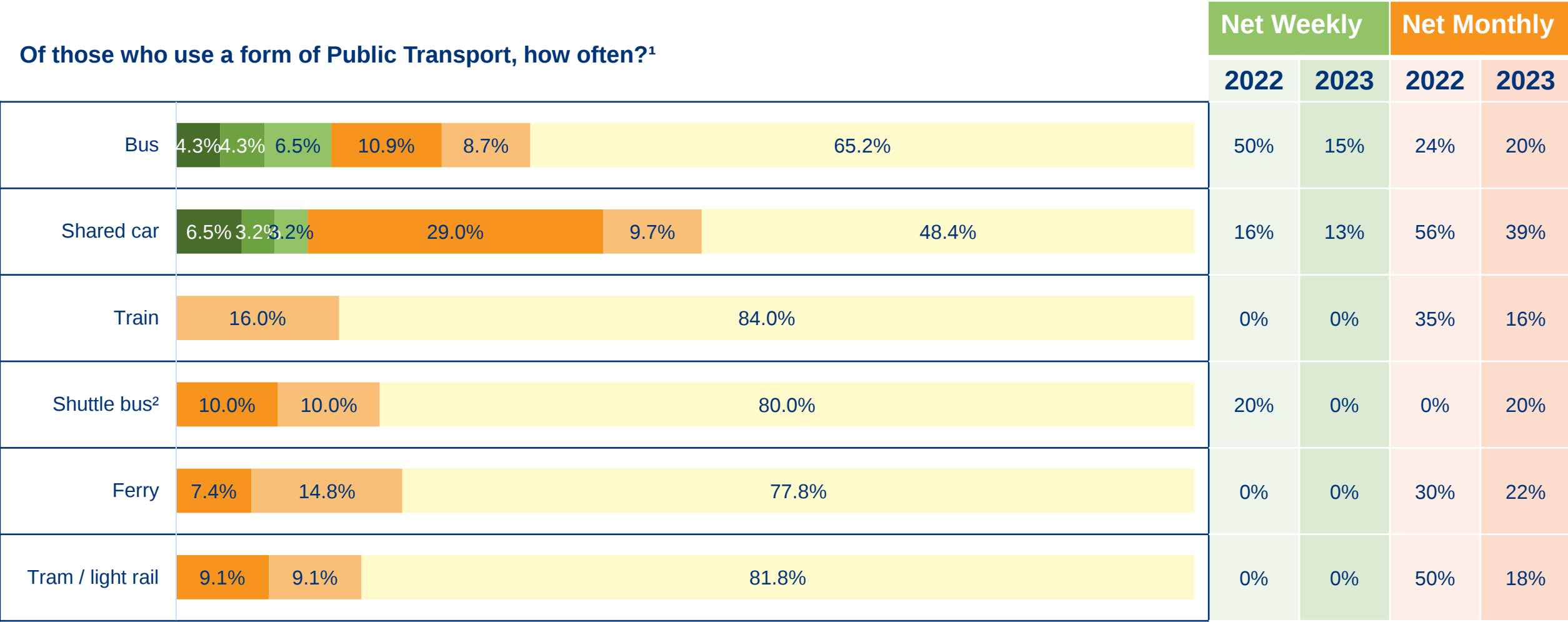


Types of Public Transport Used



In Cairns, 2 in 3 Bus users travel on it less than once per month. Less than half of Shared car users use it on a monthly basis.

Of those who use a form of Public Transport, how often?¹



- 4 or more days per week

■ 2-3 days per week

■ Once per week

■ Multiple times per month

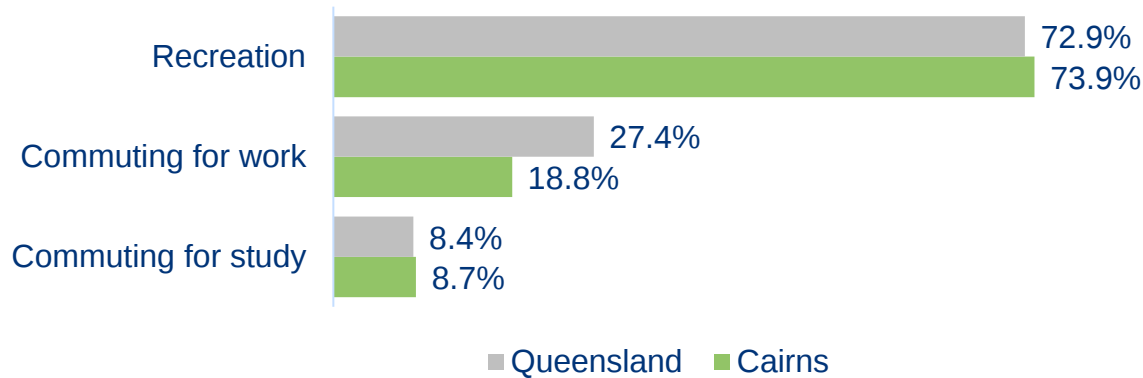
■ Once per month

■ Less than once per month

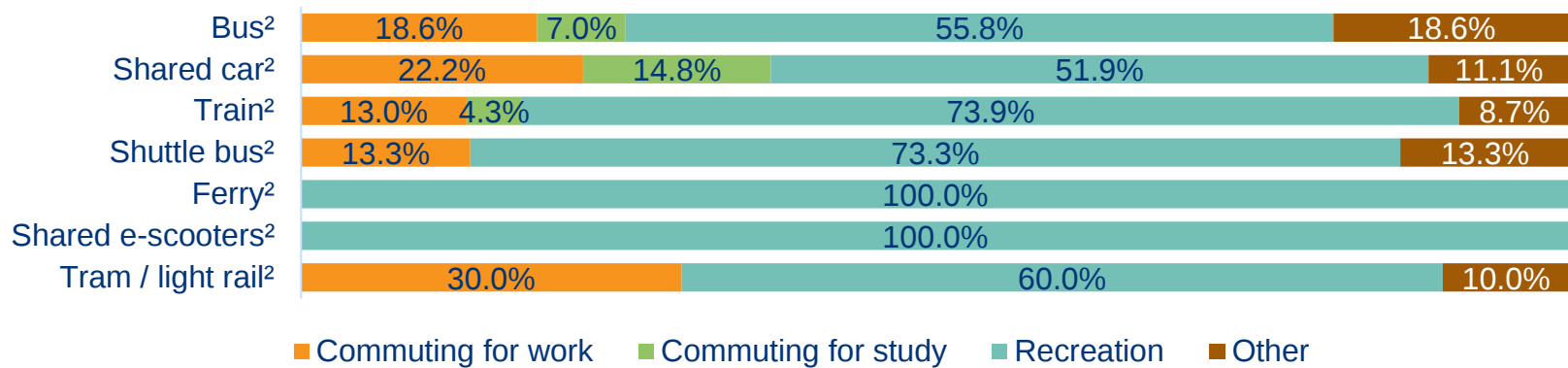
Source: Public Transport Survey 2023. Total n=1221. Cairns PT users n=69 (Bus n=43; Train n=23, Shared car n=.27; Ferry n=11; Tram/Light Rail n=10, Shuttle bus n=15, e-scooters n=5, e-bikes n=1, Bicycles n=0).
Questions: PT1. Please indicate how often you use these public transport options...
Note: ¹Forms of transport with <10 responses are not presented here ²CAUTION: Small base size <50.

Purposes for using PT in Cairns are largely on par with the rest of Queensland, though somewhat lower usage for *commuting for work*. Likelihood of Places of Work/Study to Change amongst Cairns residents was on par with Queensland overall.

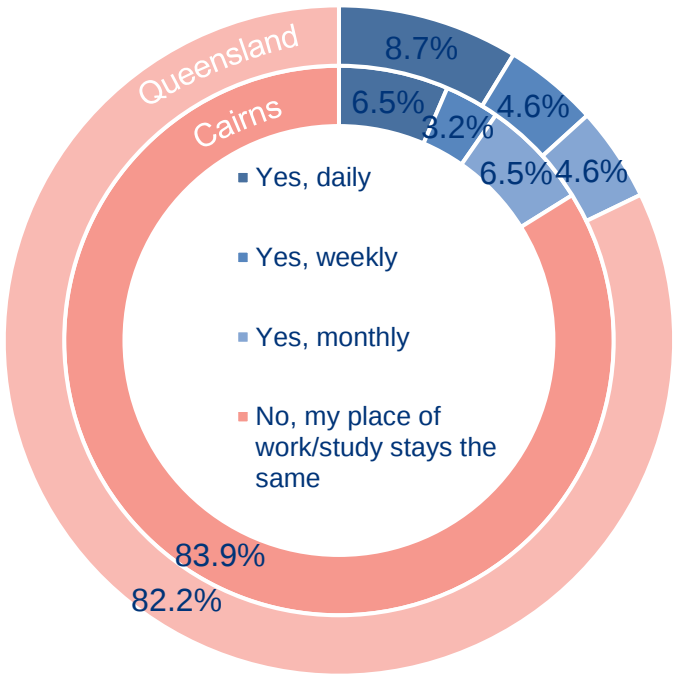
Main Purpose for Using Public Transport



Main Purpose for Using Public Transport By Method¹

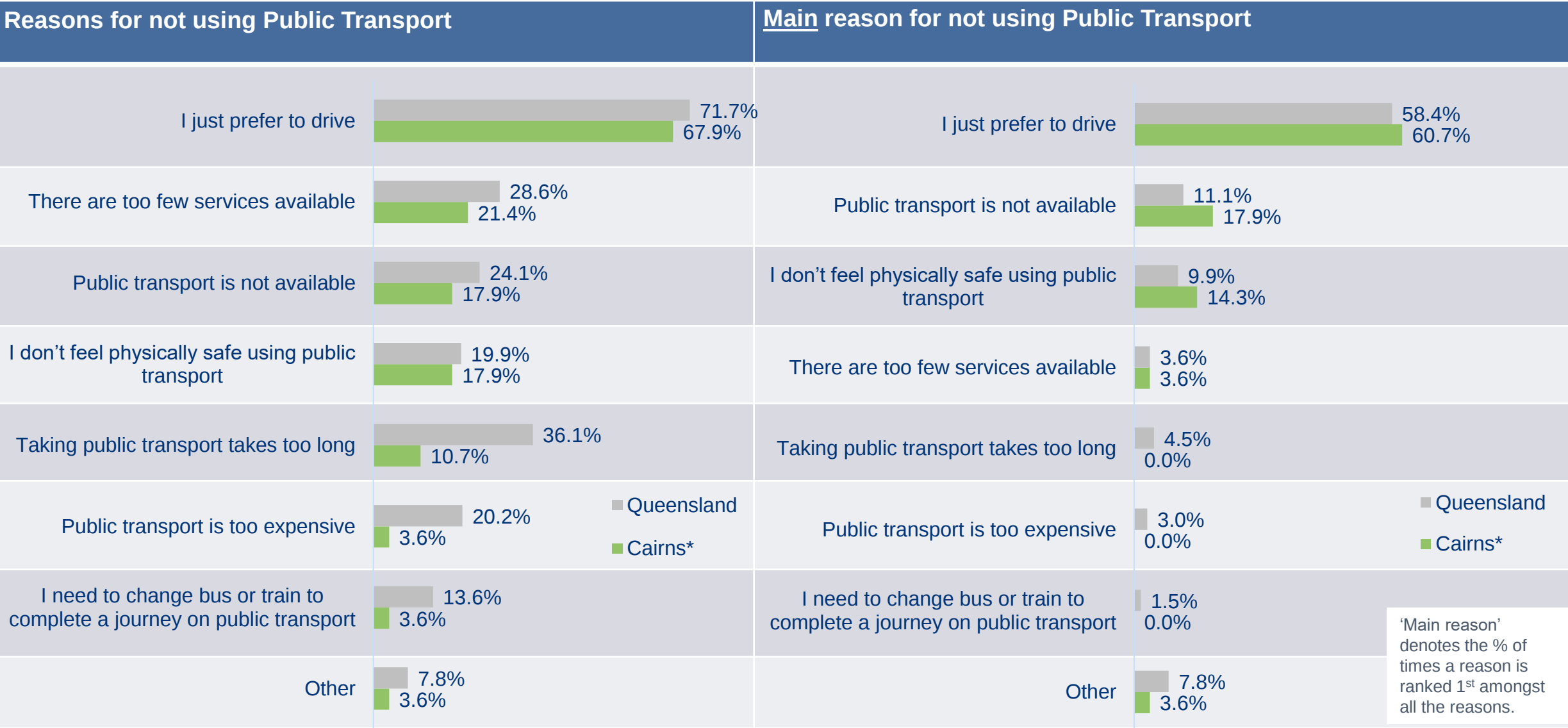


Place of Work/Study Change?*

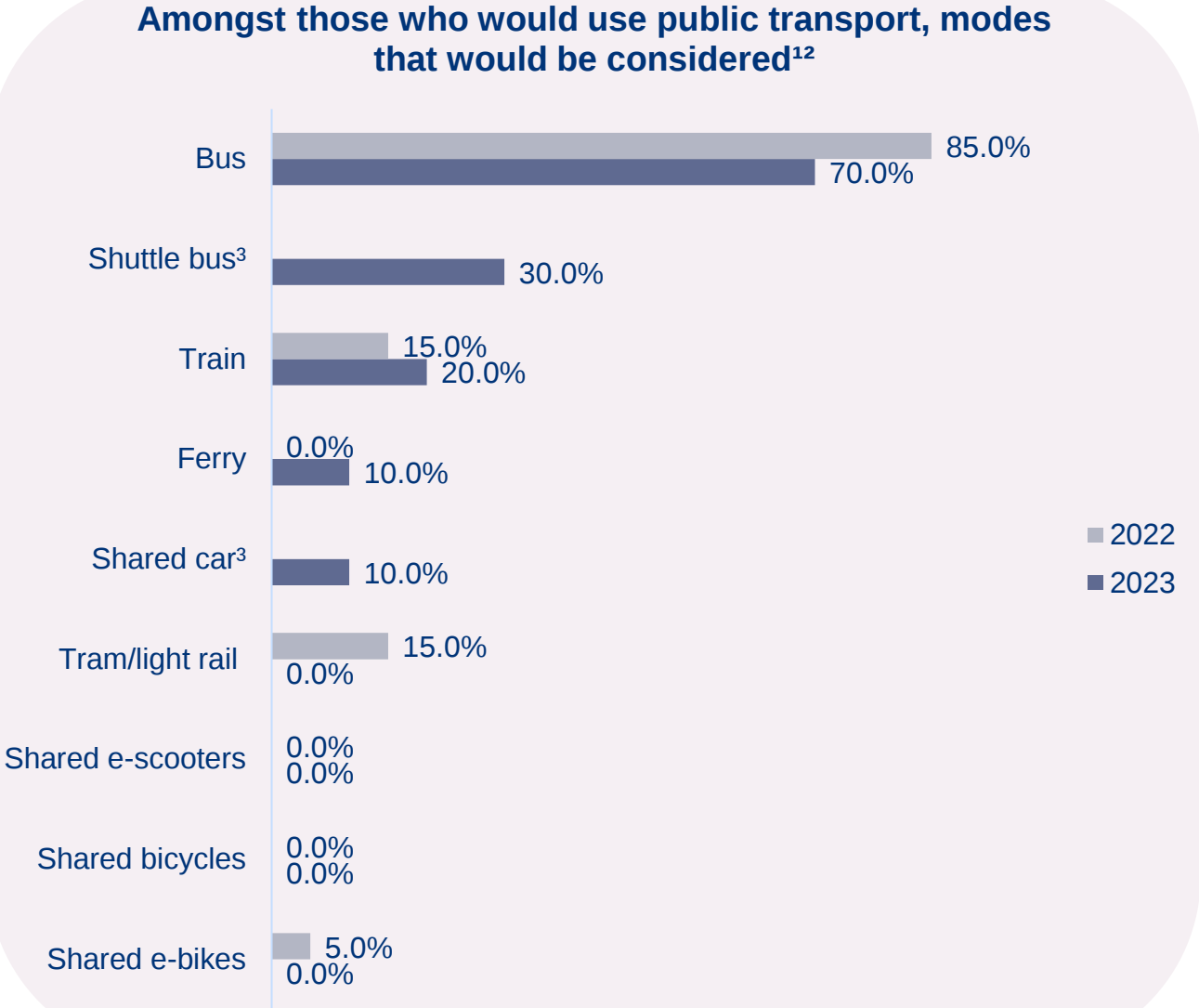
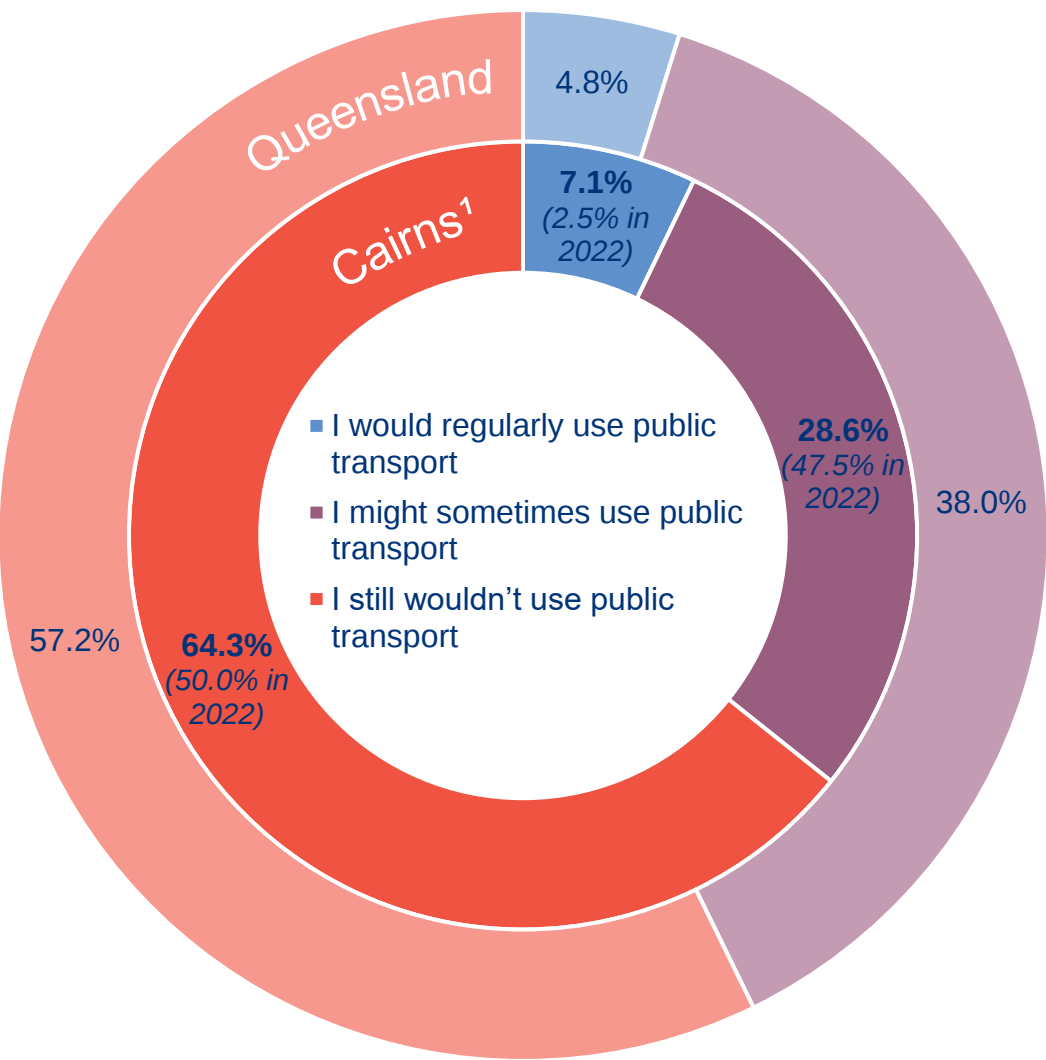


Source: Public Transport Survey 2023. Total n=1221. Cairns PT users n=69 (Bus n=43; Train n=23, Shared car n=.27; Ferry n=11; Tram/Light Rail n=10, Shuttle bus n=15, e-scooters n=5, e-bikes n=1, Bicycles n=0).
 Questions: PT2. What is your main purpose for using public transport? PT3_2 Does your place of work or study change regularly? NU3_2 Does your place of work or study change regularly?
 Note: ^{*}Asked of all residents who work or study; ¹Forms of transport with <10 responses are not presented here; ²CAUTION: Small base size <50.

Preference to drive is the most common and the top main reason for Cairns residents to not use Public Transport. Notably, *unavailability of PT* and *physical safety* were ranked higher as ‘main reasons’ for non-usage.



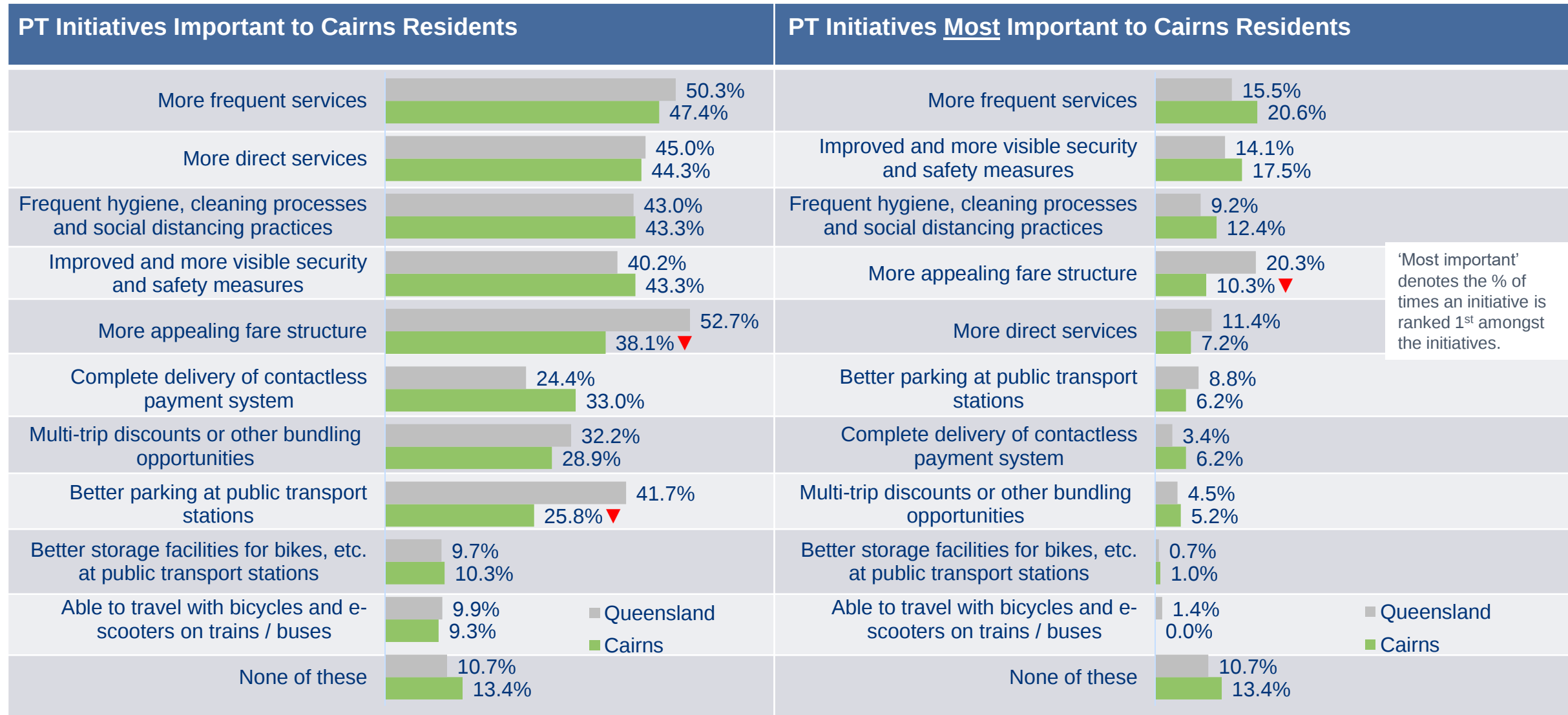
Cairns non-users cited higher than averaged that they *still wouldn't* use PT should their concerns be addressed. Those who *still wouldn't* use PT rose since last year, however this is likely linked to smaller base sizes.



Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Cairns non-users n=28, ²Those would use PT n=10) (2022 Cairns non-users n=40, ²Those would use PT n=20)
 Questions: NU4. If your concerns with public transport were improved, how likely would you be to use public transport? NU4. If you used any public transport, which of the following modes would you consider?
 Note: ¹CAUTION: Small Base Size <50; ³2022 Shuttle bus and Shared car categories were combined and have not been presented above.

▲ ▼ Significant difference at 95% confidence level, Cairns vs QLD.
 ▲* ▼* Significant difference at 95% confidence level, latest vs previous year.

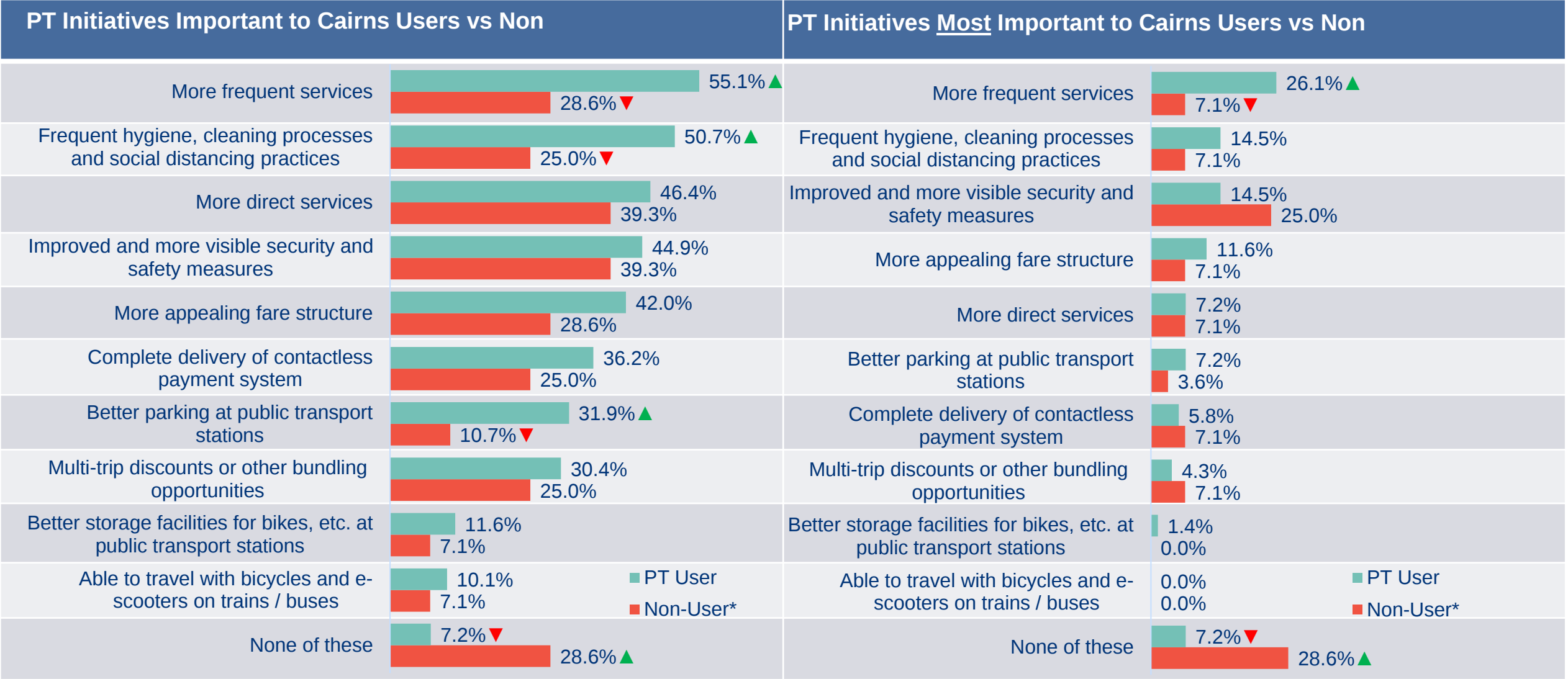
Service frequency and security measures were most likely to be the ‘most important’ initiatives to Cairns residents. Fare structure were significantly less likely to be cited nor ranked higher, while feeling that ‘none of these’ are important was relatively higher.



Source: Public Transport Survey 2023. Total n=1221. Cairns residents n=97.

88 Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).

Frequent service and Frequent hygiene were of greater importance to PT Users in Toowoomba. Security measures were of greater importance to non-users.

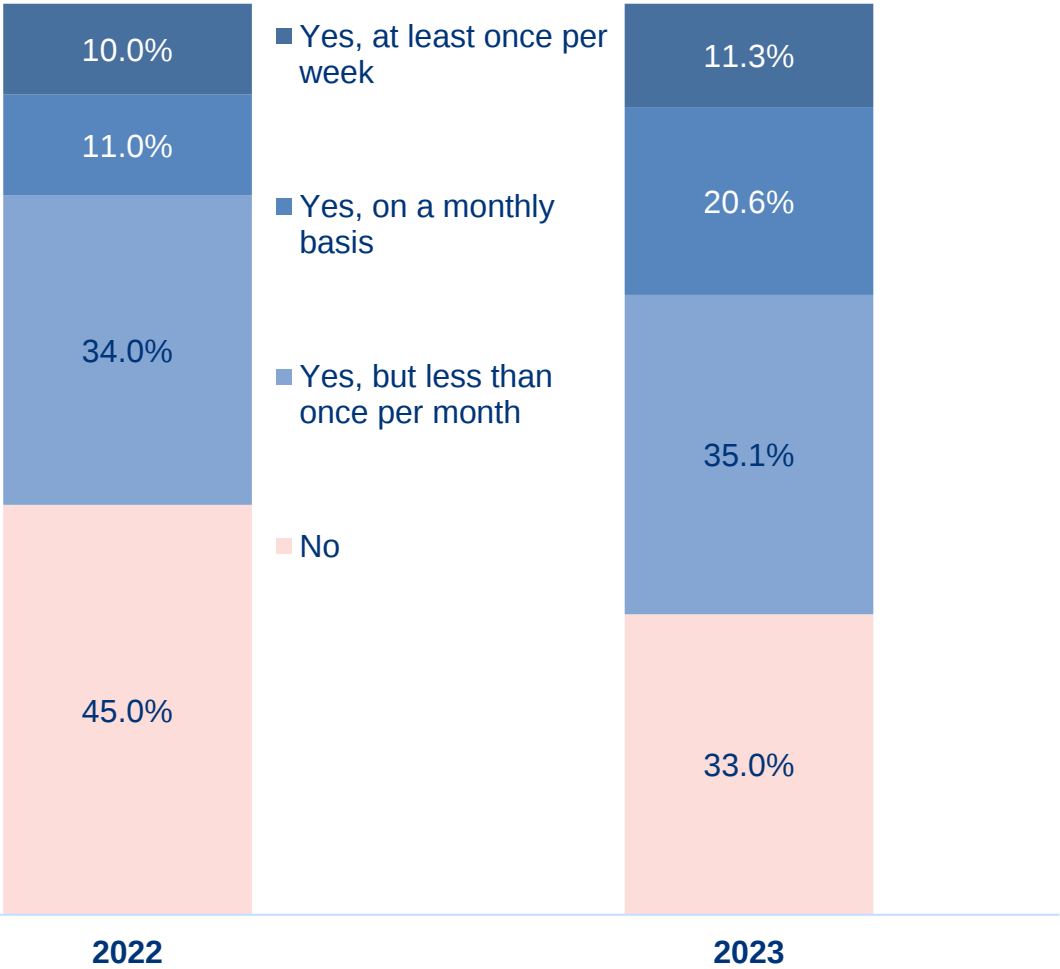


Townsville

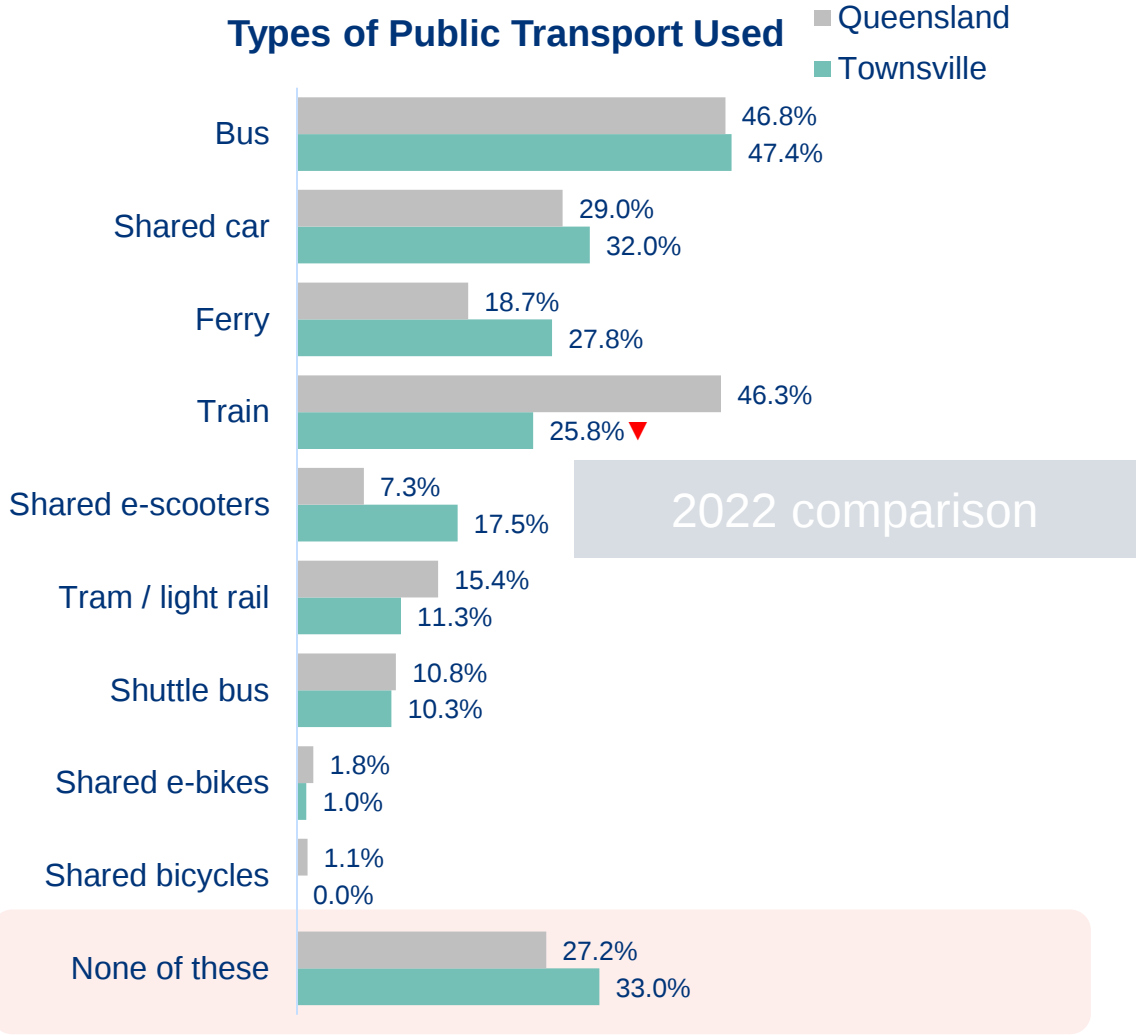
Public Transport User Profile

Townsville residents exhibit Public Transport usage levels slightly lower than the state-wide average. Ferry and e-Scooter usage was somewhat higher while Train usage was significantly lower. Non-usage dropped somewhat since 2022.

Do Townsville Residents Use Public Transport?



Types of Public Transport Used



Source: Public Transport Survey 2023. Total n=1221. Townsville residents n=97 (2022 Townsville residents n=100)
Questions: Q1. Please indicate if you have used any of these forms of public transport at any time in the past 12 months. PT1. Please indicate how often you use these public transport options...

▲ ▼ Significant difference at 95% confidence level, Townsville vs QLD.

In Townsville, weekly Public Transport usage was only among 1 in 6 users.

Of those who use a form of Public Transport, how often?¹

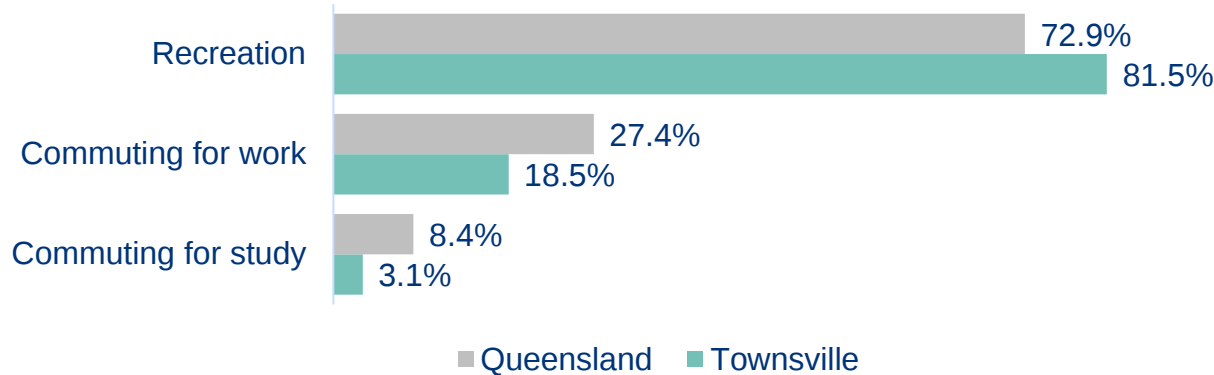
Of those who use a form of Public Transport, how often? ¹							Net Weekly		Net Monthly	
							2022	2023	2022	2023
Bus ²	4.3% 4.3% 6.5% 10.9% 8.7% 65.2%						22%	15%	22%	20%
Shared car ²	6.5% 3.2% 3.2% 29.0% 9.7% 48.4%						25%	13%	25%	39%
Ferry ²	7.4% 14.8% 77.8%						3%	0%	24%	22%
Train ²	16.0% 84.0%						14%	0%	7%	16%
Shared e-scooters ²	23.5% 11.8% 64.7%						6%	0%	39%	35%
Tram / light rail ²	9.1% 9.1% 81.8%						0%	0%	0%	18%
Shuttle bus ²	10.0% 10.0% 80.0%						0%	0%	17%	20%

- 4 or more days per week
- 2-3 days per week
- Once per week
- Multiple times per month
- Once per month
- Less than once per month

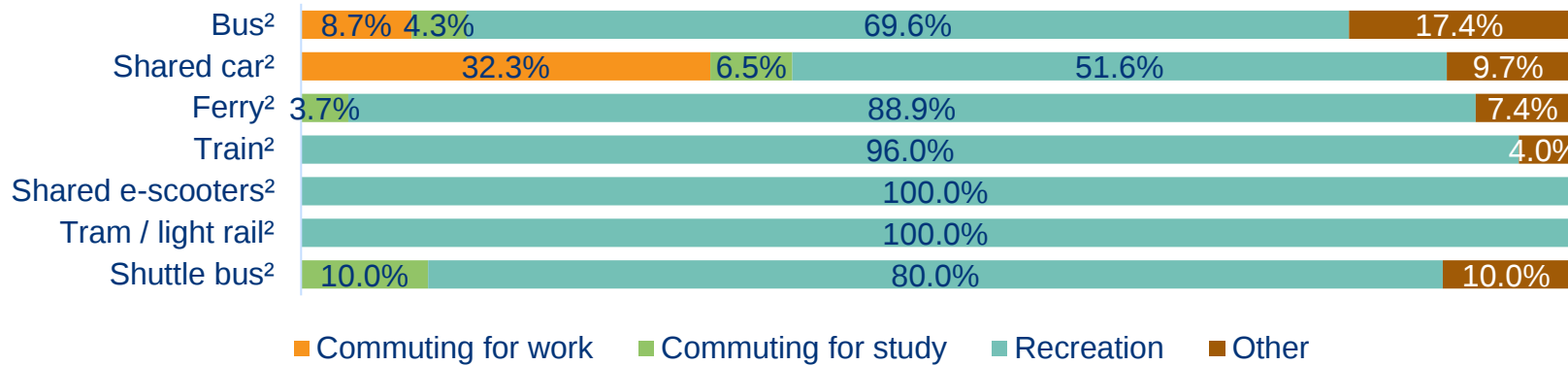
Source: Public Transport Survey 2023. Total n=1221. Townsville PT users n=65 (Bus n=46; Train n=25, Shared car n=.31; Ferry n=27; Tram/Light Rail n=11, Shuttle bus n=10, e-scooters n=17, e-bikes n=1 Bicycles n=0).
Questions: PT1. Please indicate how often you use these public transport options...
Note: ¹Forms of transport with <10 responses are not presented here ²CAUTION: Small base size <50.

Purposes for using PT in Townsville are largely on par with the rest of Queensland, though somewhat lower usage for *commuting for work*. Likelihood of Places of Work/Study to Change amongst Townsville residents was lower than Queensland overall.

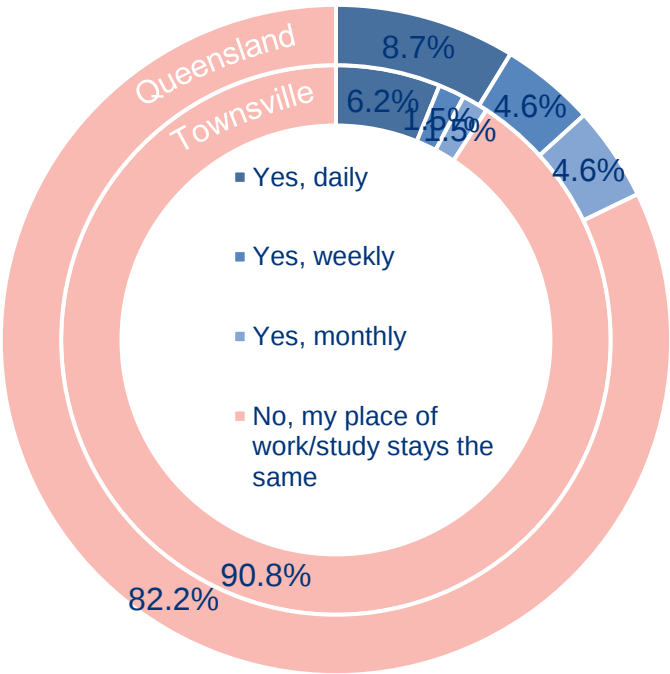
Main Purpose for Using Public Transport



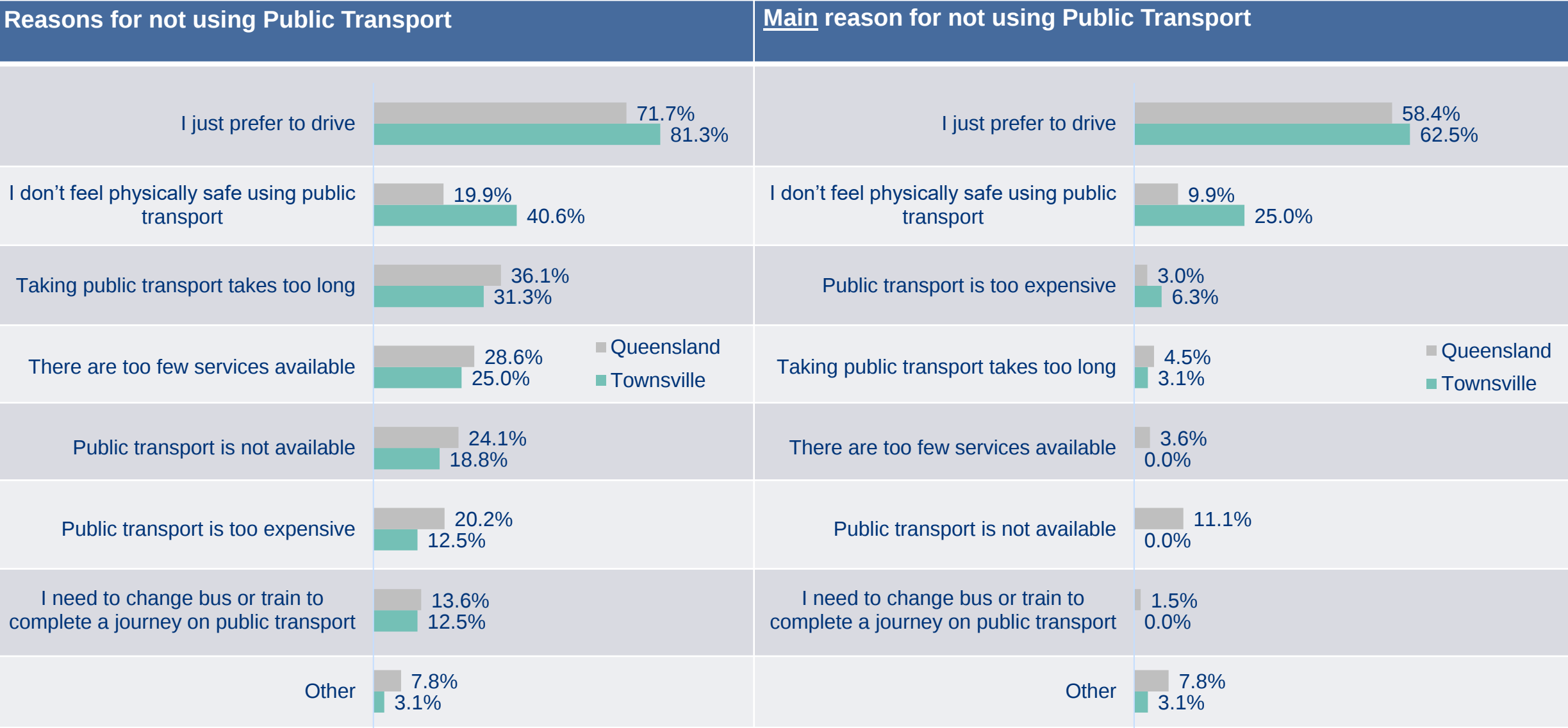
Main Purpose for Using Public Transport By Method¹



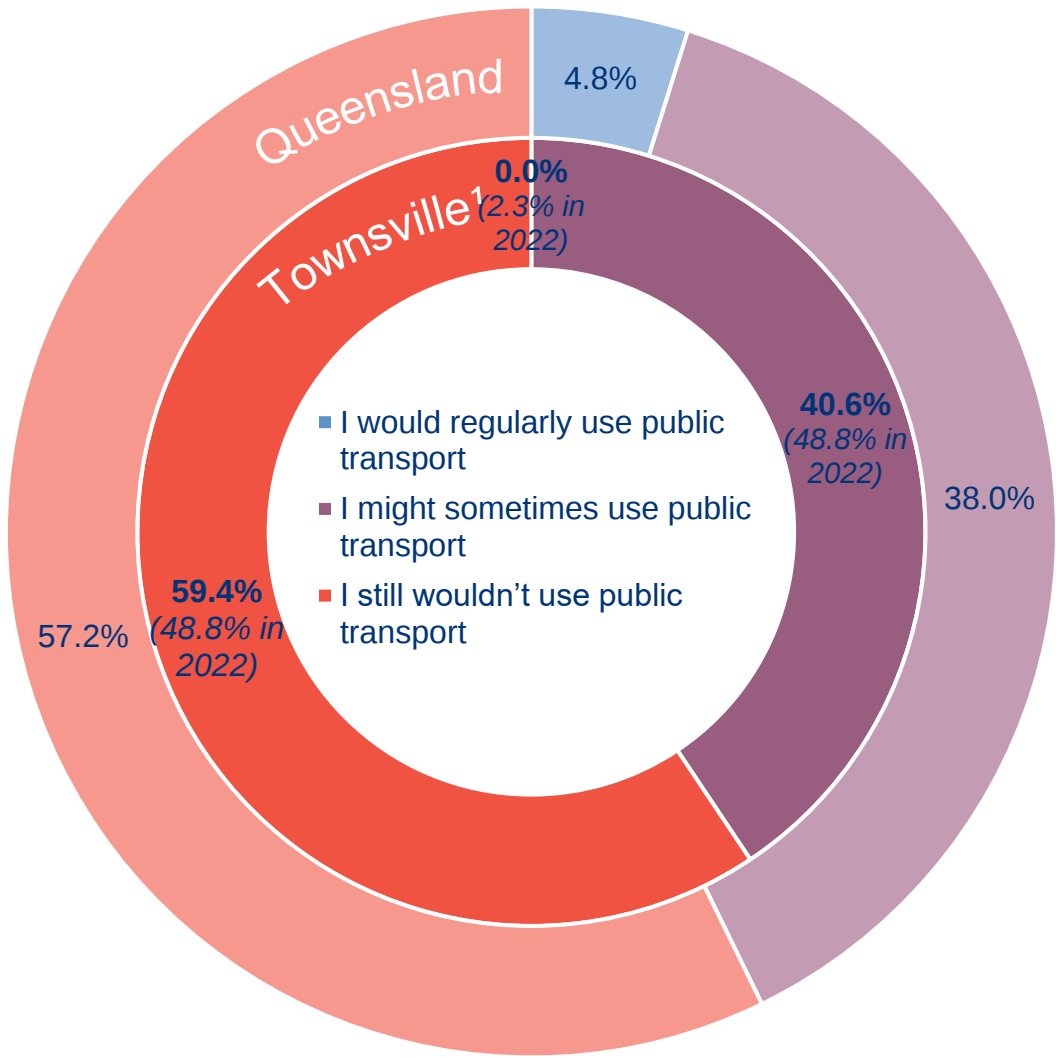
Place of Work/Study Change?



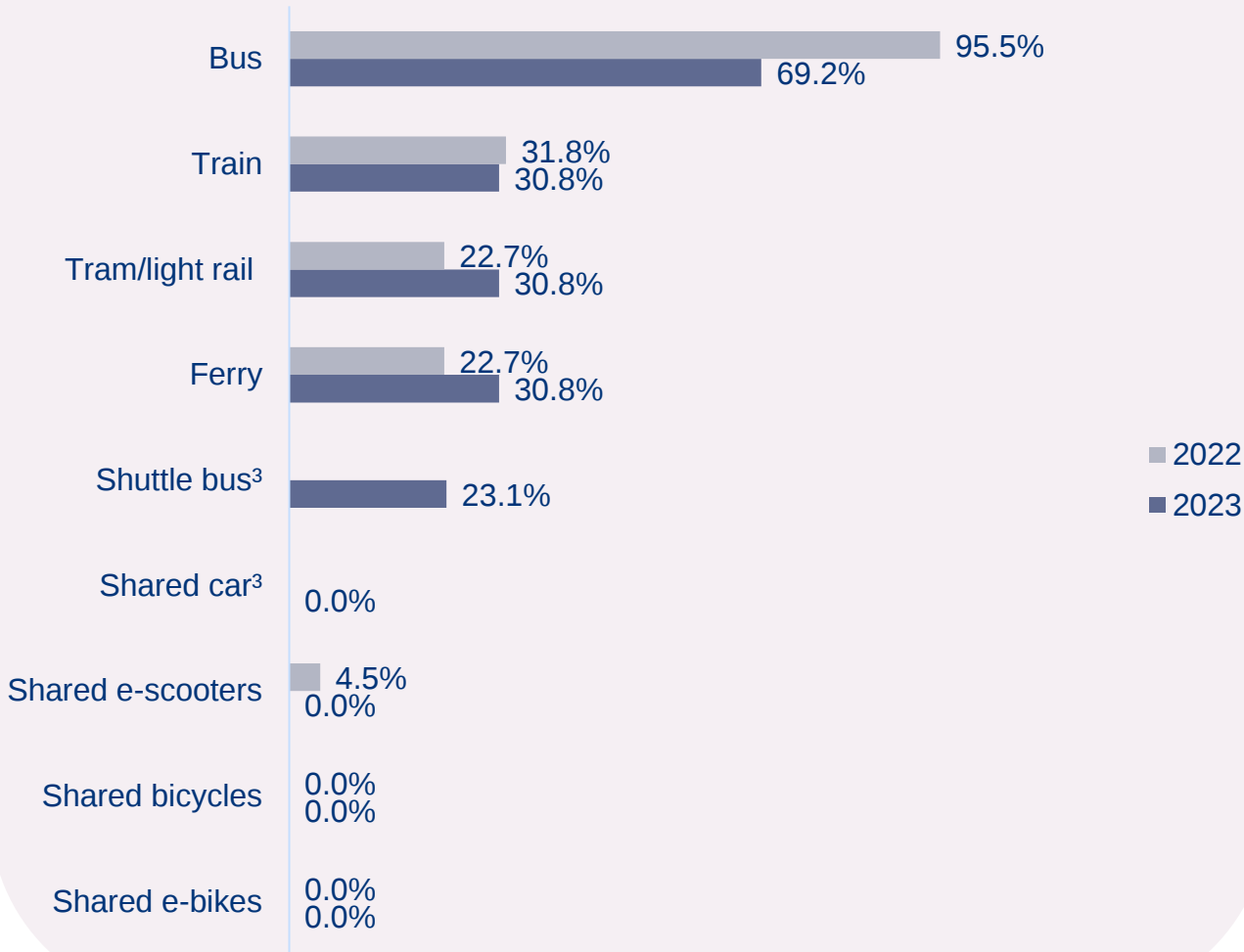
Preference to drive is the most common and the top main reason for Townsville residents to not use Public Transport. Notably, *physical safety* was both more commonly cited and a top ‘main reasons’ for non-usage in Townsville.



Conditional PT usage among Non-users in Townsville was largely consistent with the state-wide average, though none in this sample indicated they would become regular users. Those who *still wouldn't* use PT rose since last year, however this is likely linked to smaller base sizes.



Amongst those who would use public transport, modes that would be considered¹²



Source: Public Transport Survey 2023. Total n=1221. Non-users n=332 (Townsville non-users n=54, ²Those would use PT n=29)
Questions: NU4. If your concerns with public transport were improved, how likely would you be to use public transport? NU4. If you used any public transport, which of the following modes would you consider?
Note: ¹CAUTION: Small Base Size <50; ²2022 Shuttle bus and Shared car categories were combined and have not been presented above.

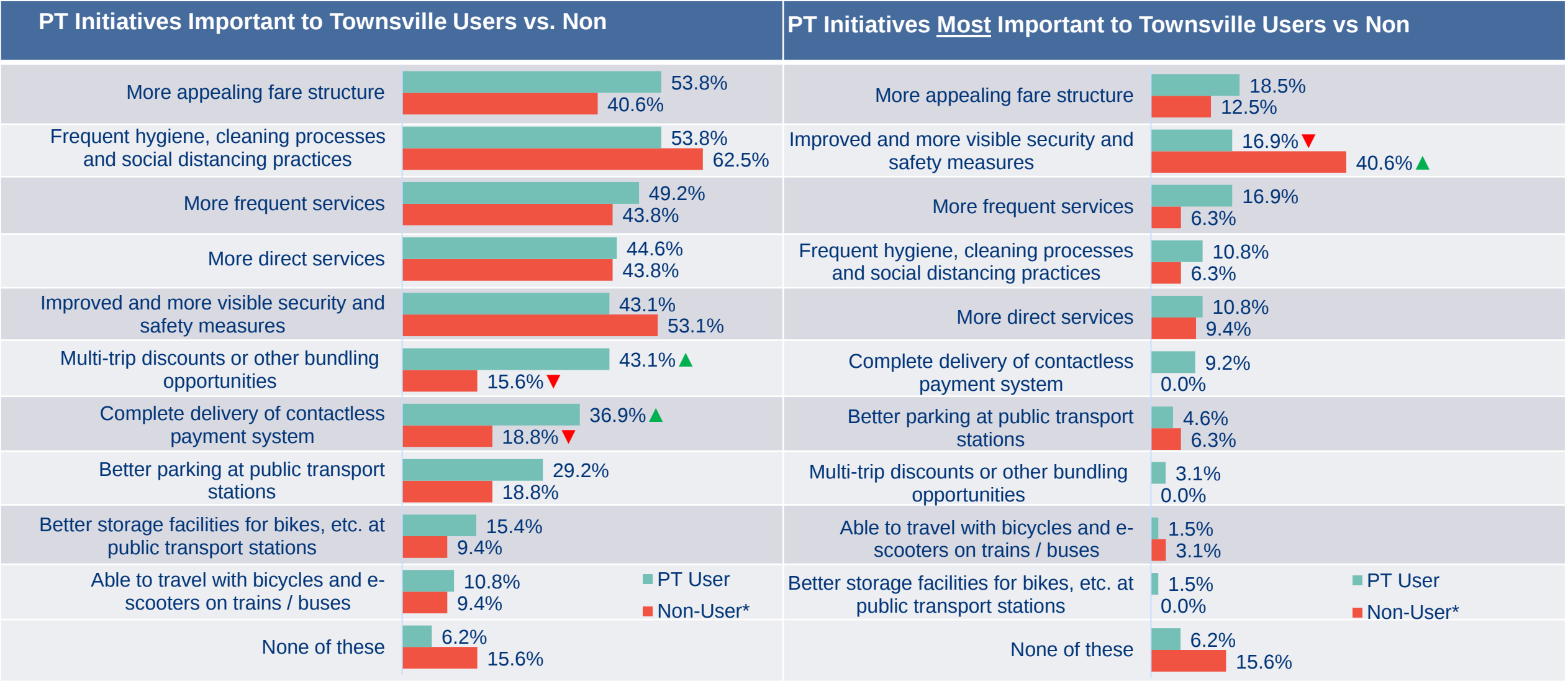
▲ ▼ Significant difference at 95% confidence level, Townsville vs QLD.
▲ * ▼ Significant difference at 95% confidence level, latest vs previous year.

Frequent hygiene was considered important amongst over half of Townsville residents, while significantly more than the QLD average considered *security measures* a ‘most important’ PT initiative.

PT Initiatives Important to Townsville Residents			PT Initiatives <u>Most</u> Important to Townsville Residents		
Frequent hygiene, cleaning processes and social distancing practices	43.0%	56.7%▲	Improved and more visible security and safety measures	14.1%	24.7%▲
More appealing fare structure	52.7%	49.5%	More appealing fare structure	20.3%	16.5%
More frequent services	50.3%	47.4%	More frequent services	15.5%	13.4%
Improved and more visible security and safety measures	40.2%	46.4%	More direct services	11.4%	10.3%
More direct services	45.0%	44.3%	Frequent hygiene, cleaning processes and social distancing practices	9.2%	9.3%
Multi-trip discounts or other bundling opportunities	32.2%	34.0%	Complete delivery of contactless payment system	3.4%	6.2%
Complete delivery of contactless payment system	24.4%	30.9%	Better parking at public transport stations	8.8%	5.2%
Better parking at public transport stations	41.7%	25.8%▼	Multi-trip discounts or other bundling opportunities	4.5%	2.1%
Better storage facilities for bikes, etc. at public transport stations	9.7%	13.4%	Able to travel with bicycles and e-scooters on trains / buses	1.4%	2.1%
Able to travel with bicycles and e-scooters on trains / buses	9.9%	10.3%	Better storage facilities for bikes, etc. at public transport stations	0.7%	1.0%
None of these	10.7%	9.3%	None of these	10.7%	9.3%
Queensland Townsville			Queensland Townsville		

Source: Public Transport Survey 2023. Total n=1221. Townsville residents m=97.
 Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).

Fare structure, Frequent service and Frequent hygiene were of relative greater importance to PT Users in Townsville. Security measures were of significantly greater importance to non-users.



Source: Public Transport Survey 2023. Total n=1221. Townsville residents m=97 (PT Users n=65, Non-users n=32)
 Questions: PI1. Please select which of these public transport initiatives are important to you? PI2. Please rank the public transport initiatives you have selected, from most important (top) to least important (bottom).
 Note: *CAUTION: Small Base Size <50

APPENDIX

Sample profile: March/April 2023 (N=1221)

AGE SEGMENTS	N	%
Emerging Identities (16-24)	172	14%
Young Singles and Couples (25-34)	208	17%
Family Responsibilities (35-49)	303	25%
Mid-Life Simplifiers (50-64)	267	22%
Active Retirees (65-74)	157	13%
Young @ Heart (75+)	114	9%

GENDER	N	%
Male	580	48%
Female	639	52%
Gender diverse/non-binary	1	0%
Self-describe	1	0%

LOCATION	N	%
Brisbane	304	25%
Gold Coast	144	12%
Moreton Bay	96	8%
Sunshine Coast	110	9%
Redlands	80	7%
Logan	106	9%
Ipswich	96	8%
Toowoomba	91	8%
Cairns	97	8%
Townsville	97	8%

HOUSEHOLD	N	%
No Kids	788	65%
With Kids	433	36%

WORK STATUS	N	%
Work full-time	461	38%
Work part-time	169	14%
Self-employed	78	6%
Casual work	56	5%
Home duties	102	8%
Unemployed	49	4%
Student	40	3%
Retired	266	22%

PROFESSION	% of Employed
Managers	10% (118)
Professionals	15% (179)
Technicians/Trades	4% (46)
Community/Personal Service	4% (54)
Clerical/Administrative	10% (119)
Sales	7% (88)
Machinery Operators/Drivers	2% (22)
Labourers	4% (52)
Other	7% (86)