

Your Move Forum

The Perth Transport Landscape & How to Affect Behaviour Change

Prepared for:

Department of Transport

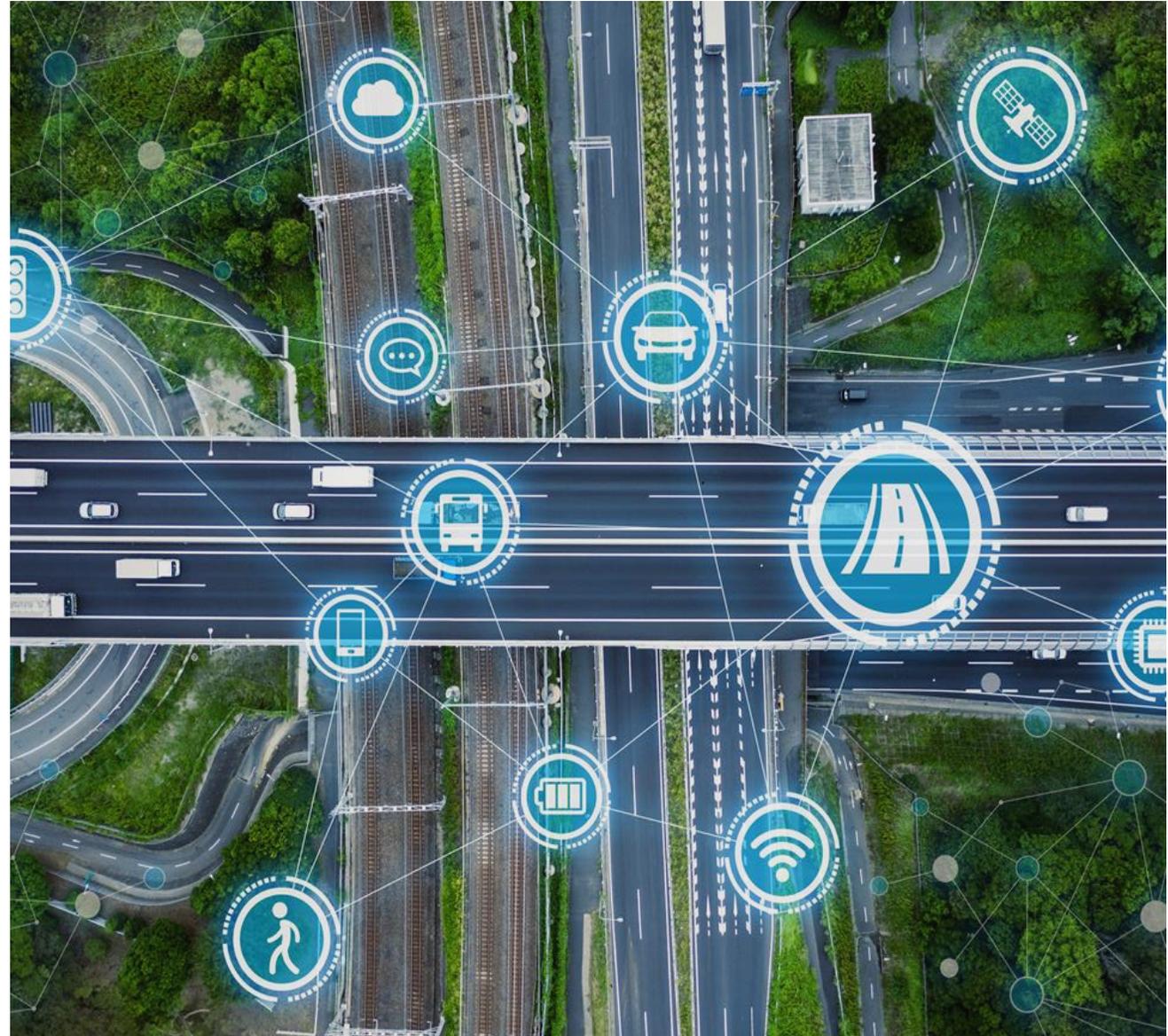
Prepared by:

Your Ipsos team



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Welcome



Shaun is an **accomplished commercial manager** with a **20 year track record delivering exceptional results.**

With a background in consulting, he has worked with multinationals in local, regional and global roles doing marketing consulting, research, strategy, planning and analytics.

Shaun is General Manager of Ipsos Perth.



Tammy is an experienced Account Manager, having spent the last **6 years at Ipsos running social research and campaign evaluation studies** for a range of sectors.

Tammy takes **special interest in quantitative research** and has a real knack for shifting through significant amounts of data to identify simple, succinct and actionable insights for her clients.

About Ipsos

Ipsos works with some of the world's largest brands, helping them to make **better business decisions** in an increasingly complex and fast paced world.

Constantly adapting, we are changing the game around how clients understand their marketing problems.

Across our 45 year history our ambition has been to make Ipsos the **partner of choice** for those who need deep understanding of their customers and markets.

\$2.8 billion
AUD

18,000+



90 Markets



**OFFICES IN
BRISBANE
SYDNEY
MELBOURNE
AND PERTH**

5000 clients

47 million interviews

of which

25 million online



**QUALITY
ASSURANCE
ACCREDITATION**



AMSRO



Is the solution to congestion more roads?



What research can tell us is...



How people travel



Why they travel the way they do



How willing they are to change



And what **barriers** we need to overcome to do this

The Government commissions a range of studies

...to understand and model the nature of travel in Perth and how to change it.



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**Perth Area
Household Travel
Survey (PATHS)**

*n=6,500
households*

**Commercial
Vehicle Survey
(CVS)**

*n=1,300
businesses/
n=4,000 vehicles*

**Formative
behaviour change
research**

**Your Move Travel
Behaviour Change
Programme**

Armed with this information, we can develop strategies for...



Optimising the
road network



Optimising the
public transport
network



Varying **urban**
planning and
density to mitigate
congestion issues



Changing
consumer
behaviour

Today we're going to be providing you, as Travel Champions...

...in your organisations, with an understanding of these things:



1st session: Ipsos

1. How people travel
2. Why they travel the way they do
3. How willing they are to change
4. What barriers we need to overcome to do this

2nd session: The Behaviour Change Collaborative

In the second session today, you'll then be taking this newfound knowledge and applying it.

1. Forcing you to **prioritise the scarce resource** you have available
2. Getting you to **pick a target market** for your next behaviour change programme
3. Come up with a **strategy for how to change** that behaviour

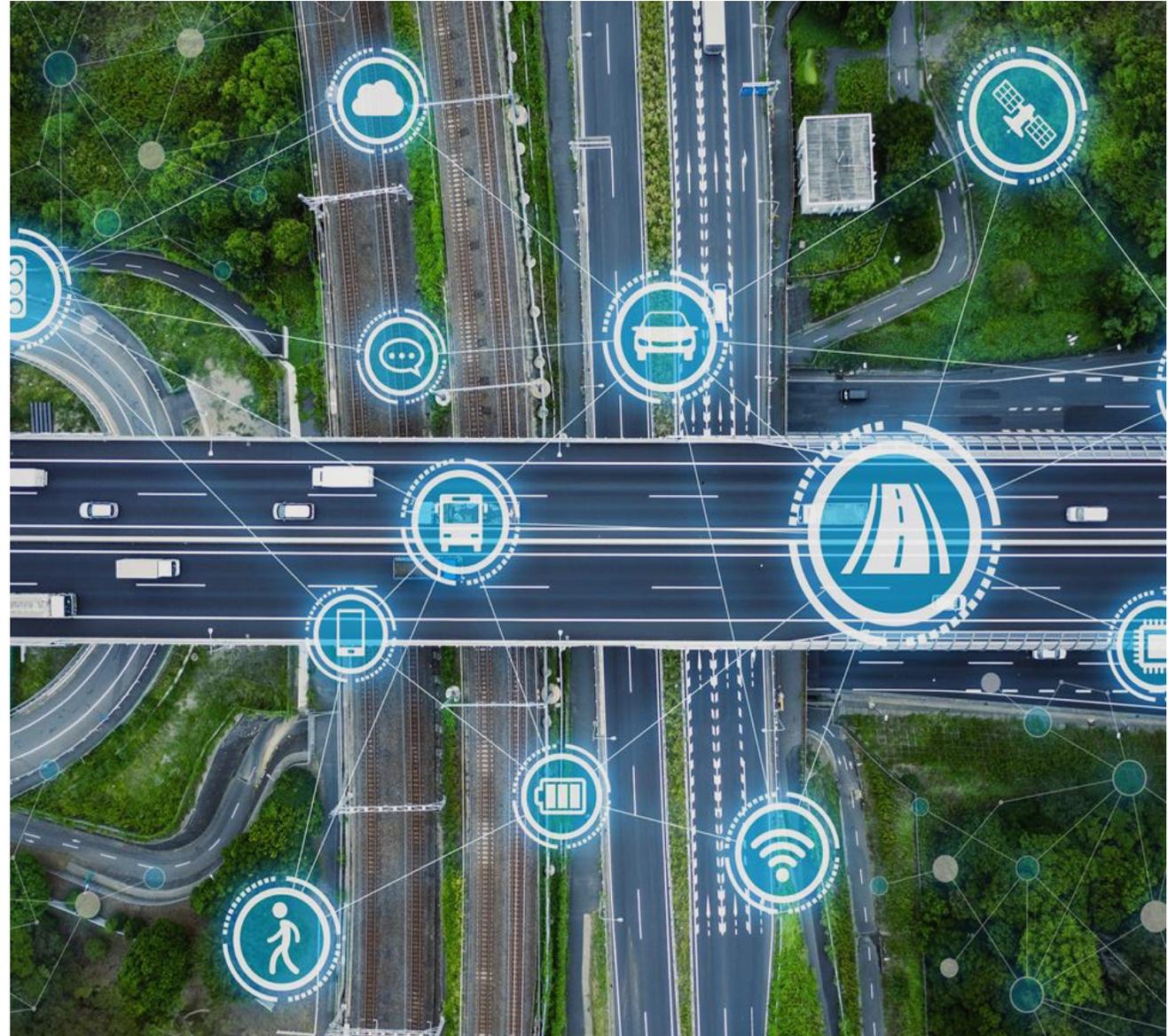


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Section 1: The unique travel challenges of Perth

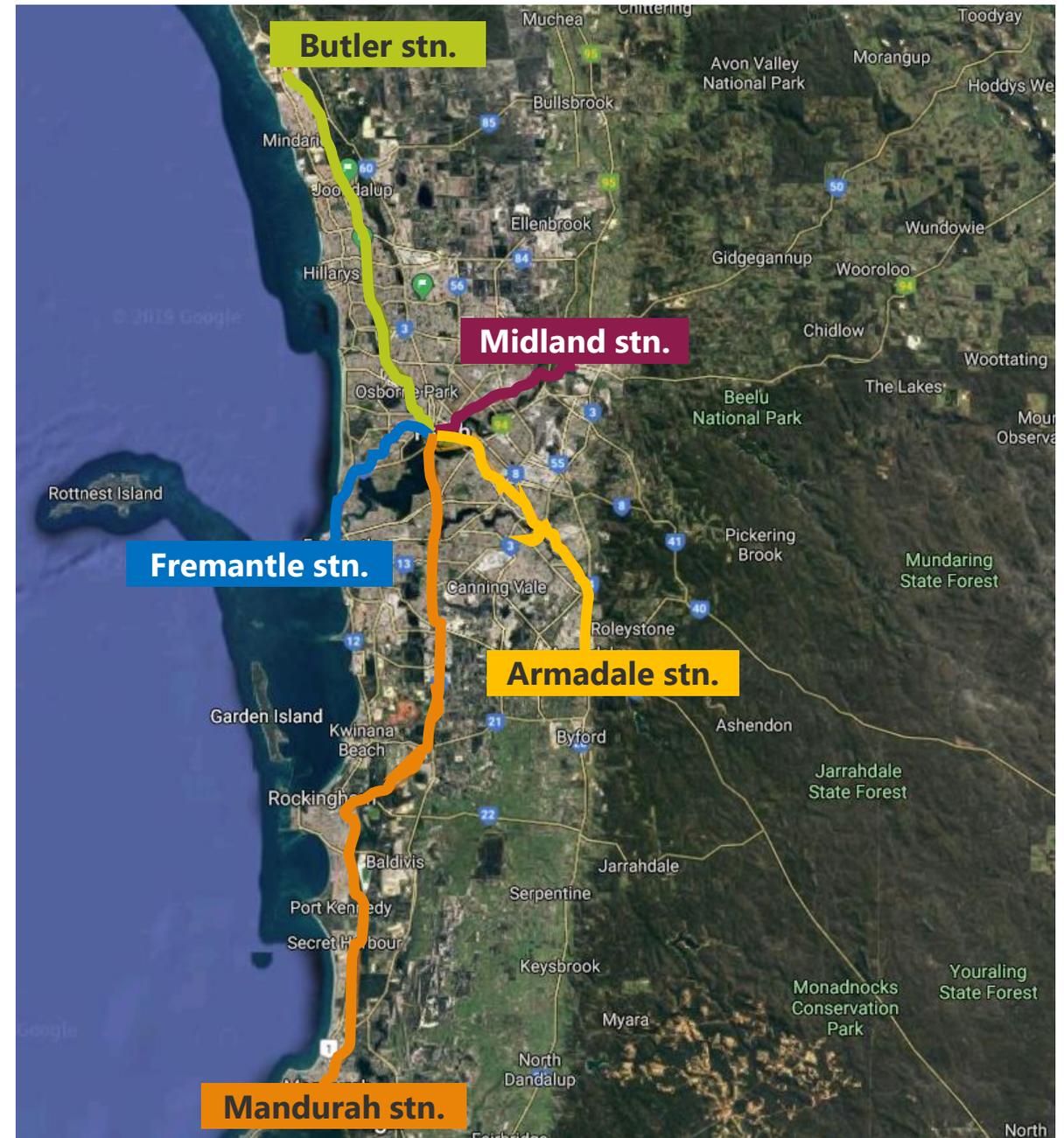


Perth's urban landscape

- Perth doesn't have the traditional round shape you see in many cities (which is very efficient for government service delivery)
- We're instead long and skinny, wedged on the coastal plain because of climate & geography
- A long North/South axial freeway and railway means everything passes through the central hub of the city
- It gives us an urban corridor as long as greater Los Angeles, with a population 20% the size.

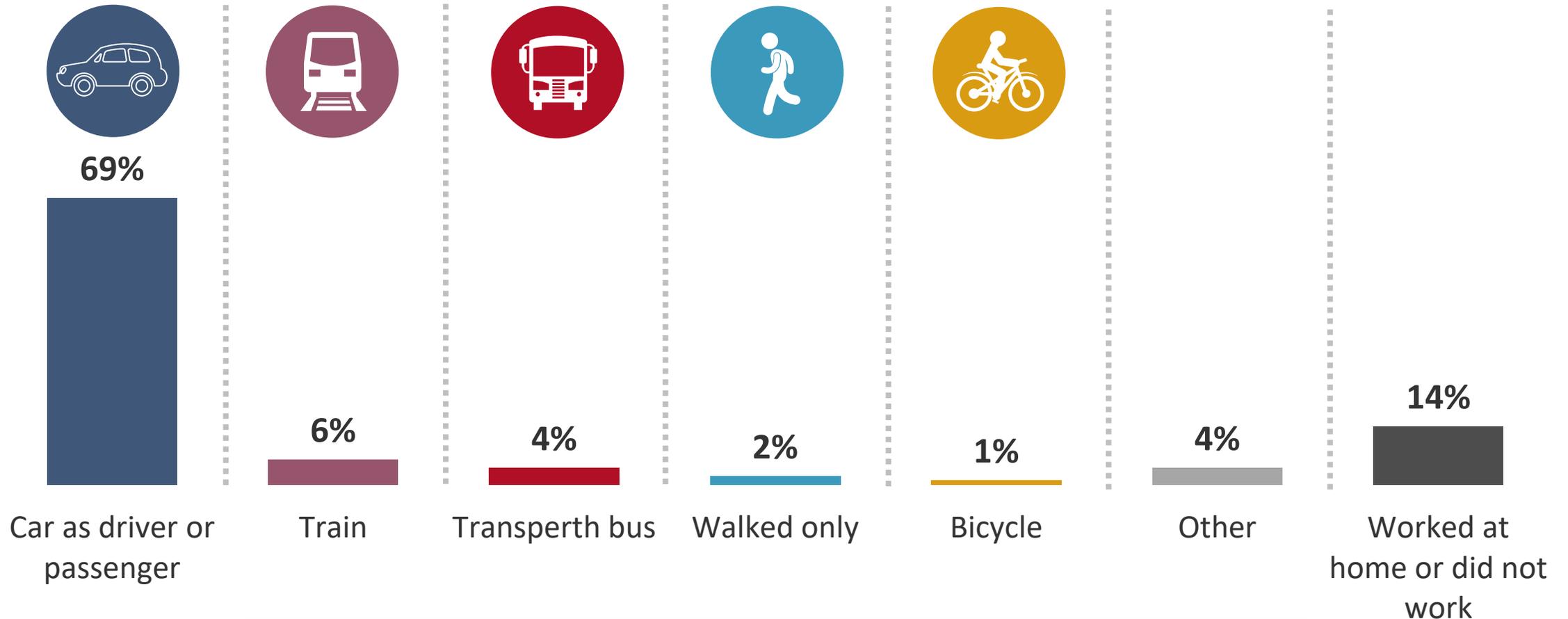


These factors make **service delivery expensive to the outer areas**, with long travel and transmission corridors.



How these challenges impact our travel choices for **work** trips

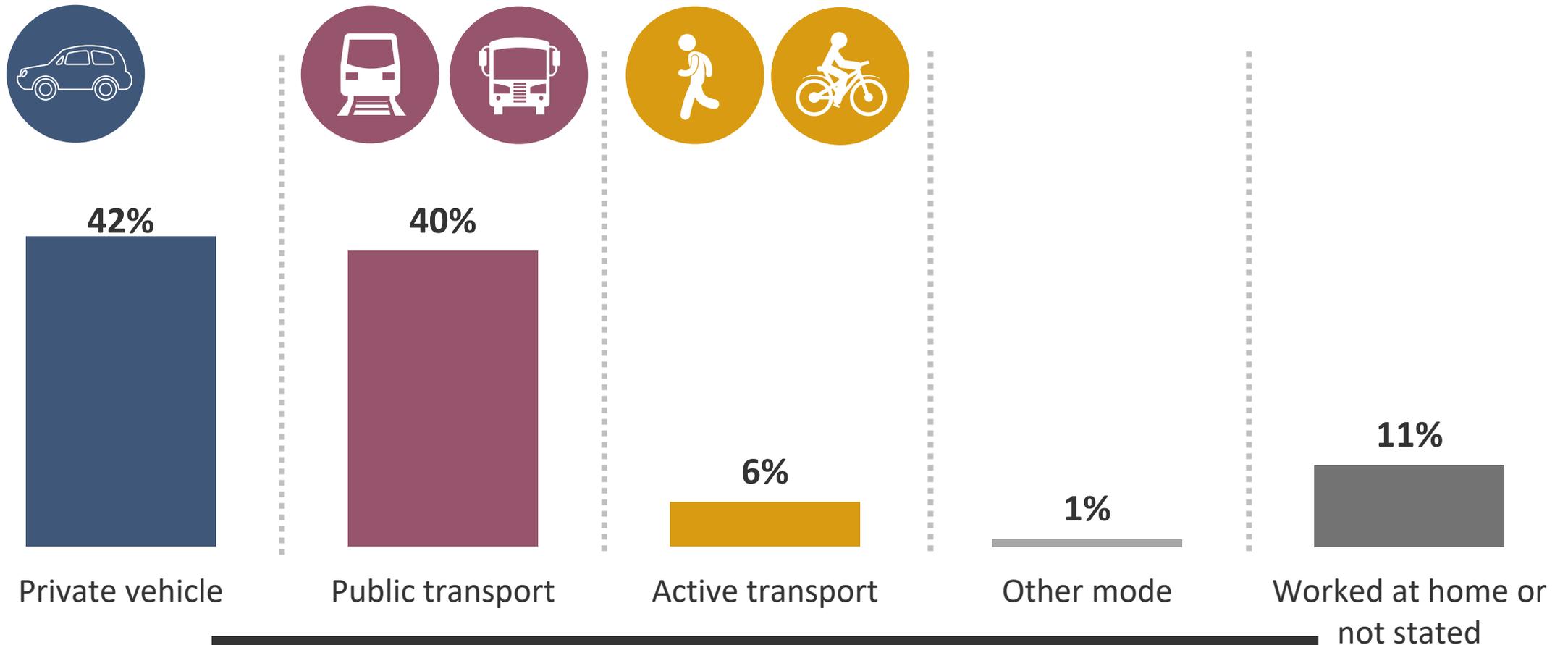
Car is the main mode choice for work trips across the Greater Perth Metro Area. This is a function of bountiful free parking and high convenience when travelling to places not on the major transport corridors.



Method of travel to work across Greater Perth Metro Area.

Work trips to Perth City (SA2)

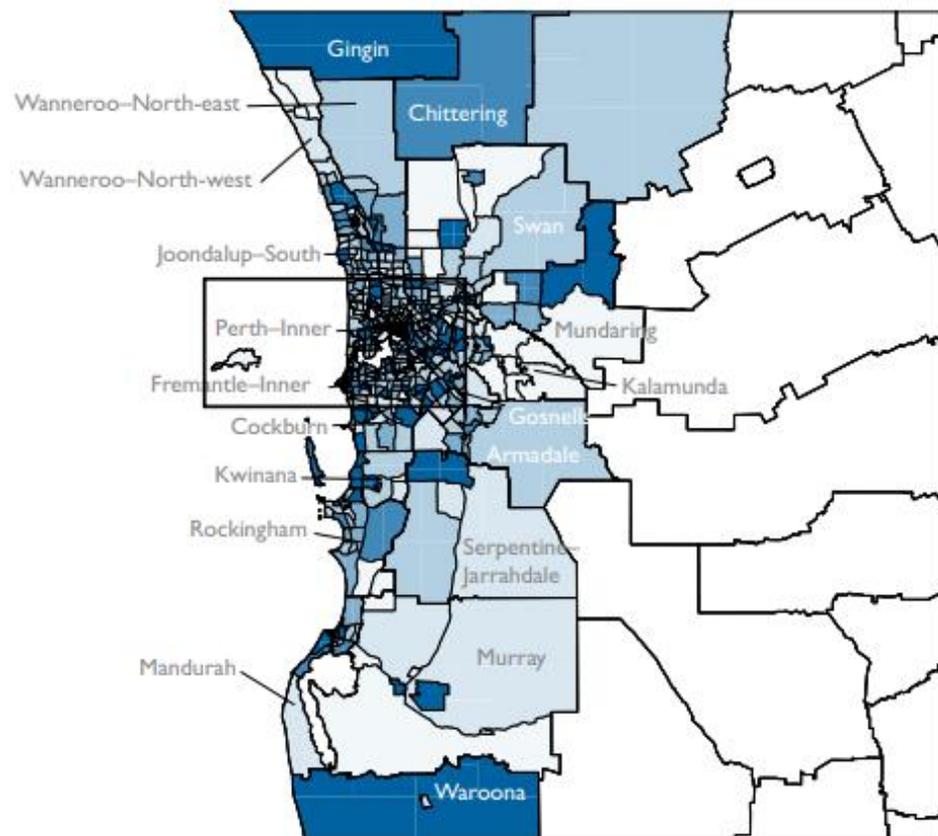
Private vehicles and public transport are equally used for commutes to Perth City (SA2) with active transport a more minor mode. The high use of PT is a function of good transport access and high parking costs.



Method of travel to work for Perth City (Statistical Areas Level 2) commutes.

Employment destinations by volume and density

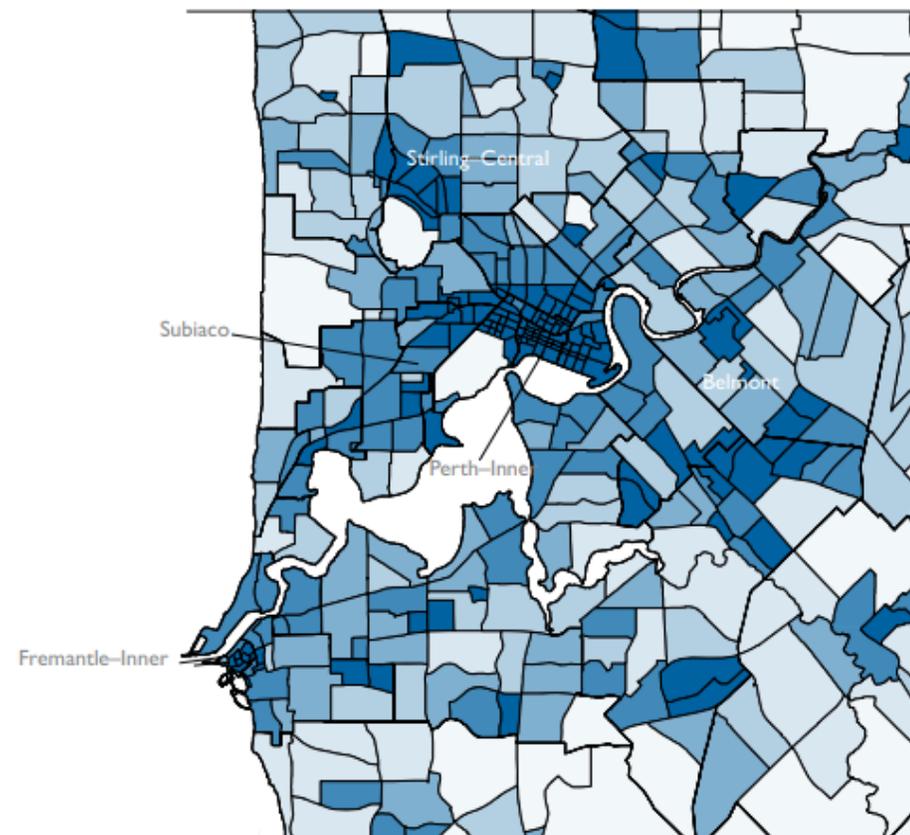
Employment is concentrated in the city but well dispersed across the urban frame. This is a blessing for liveability, but a challenge for cost effectively providing public transport.



Number of employed persons, 2006 by destination zone

- More than 1250
- 1000 to 1250
- 750 to 1000
- 500 to 750
- 250 to 500
- Less than 250

— SLA boundary — Destination zone boundary

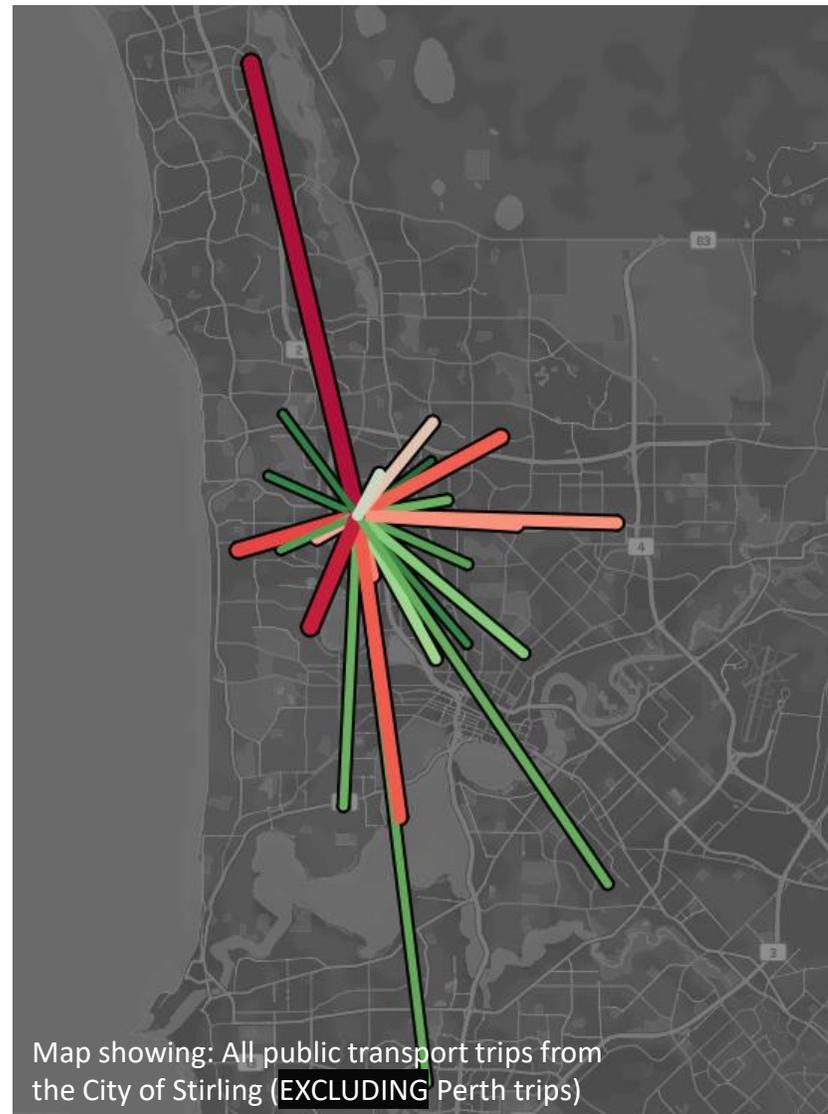
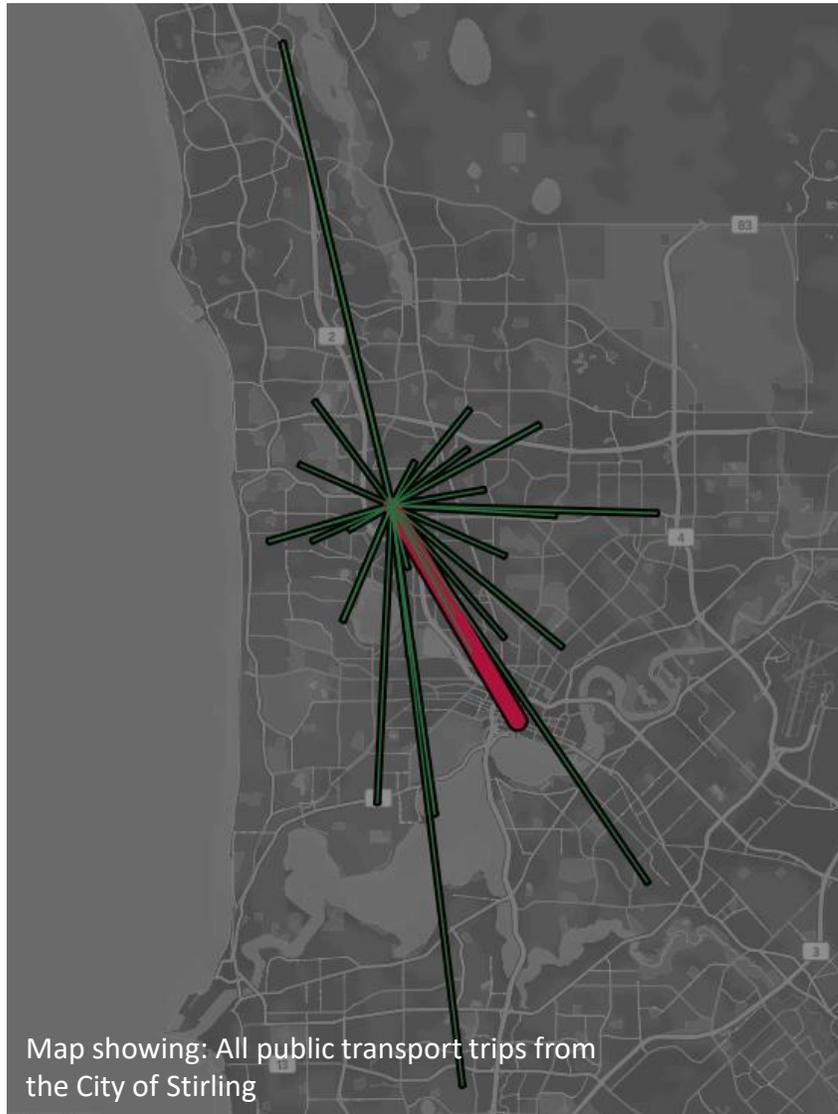


Job density (persons per square kilometre)

- More than 1500
- 500 to 1500
- 300 to 500
- 200 to 300
- 100 to 200
- Less than 100

— SLA boundary — Destination zone boundary

Perth is the largest PT travel destination for the City of Stirling



Perth CBD is the main destination (as it is for most areas).

Significant travel still occurs to the next biggest employment and educational centres (i.e. the combined hospital / commercial / university precincts) of:

- UWA / Children's hospital
- Murdoch / Fiona Stanley
- Curtin/ Tech park
- Joondalup / ECU
- Fremantle
- Armadale
- Midland

Breaking the focus on the CBD is hard



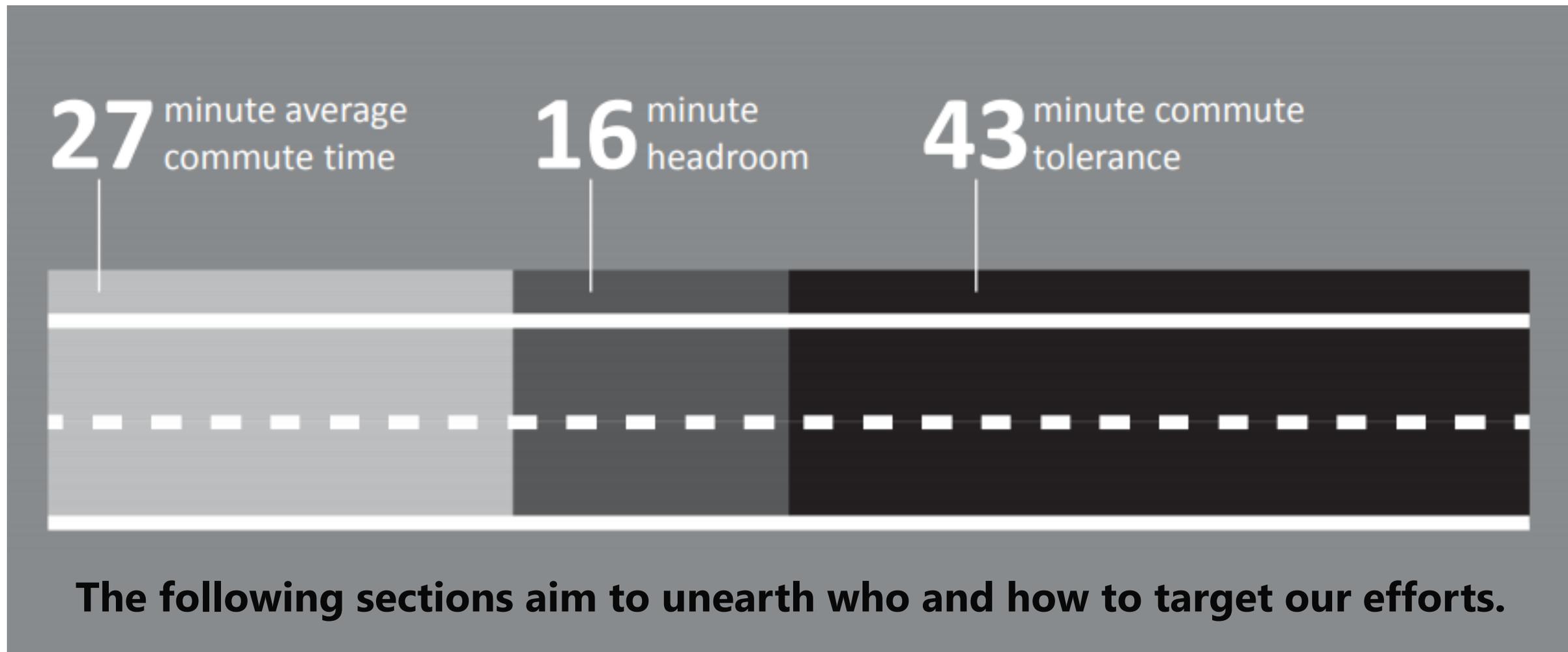
Businesses and Government departments see value in **the critical mass of proximity**

Employees see value in **the critical mass of the opportunity**

and the direct transit corridors

Breaking the focus on driving will not be easy

While congestion is a big frustration, it's still below commuters' tolerance threshold. This isn't the case in other big cities. Getting people out of cars will require other levers (i.e. cost penalties) and educating where Public Transport is the better option.



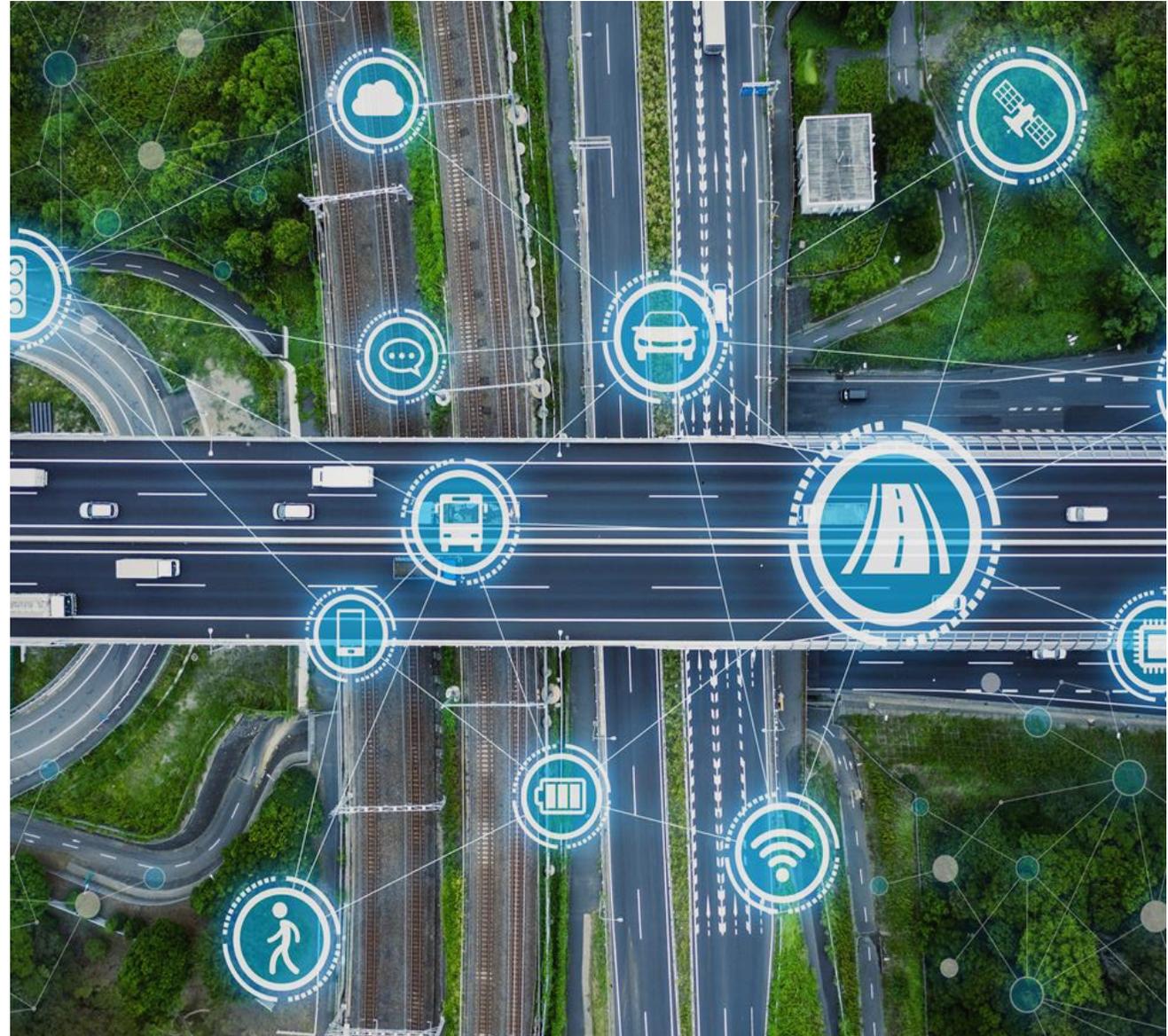
The following sections aim to unearth who and how to target our efforts.

**Section 2:
What we know
about affecting
mode change**



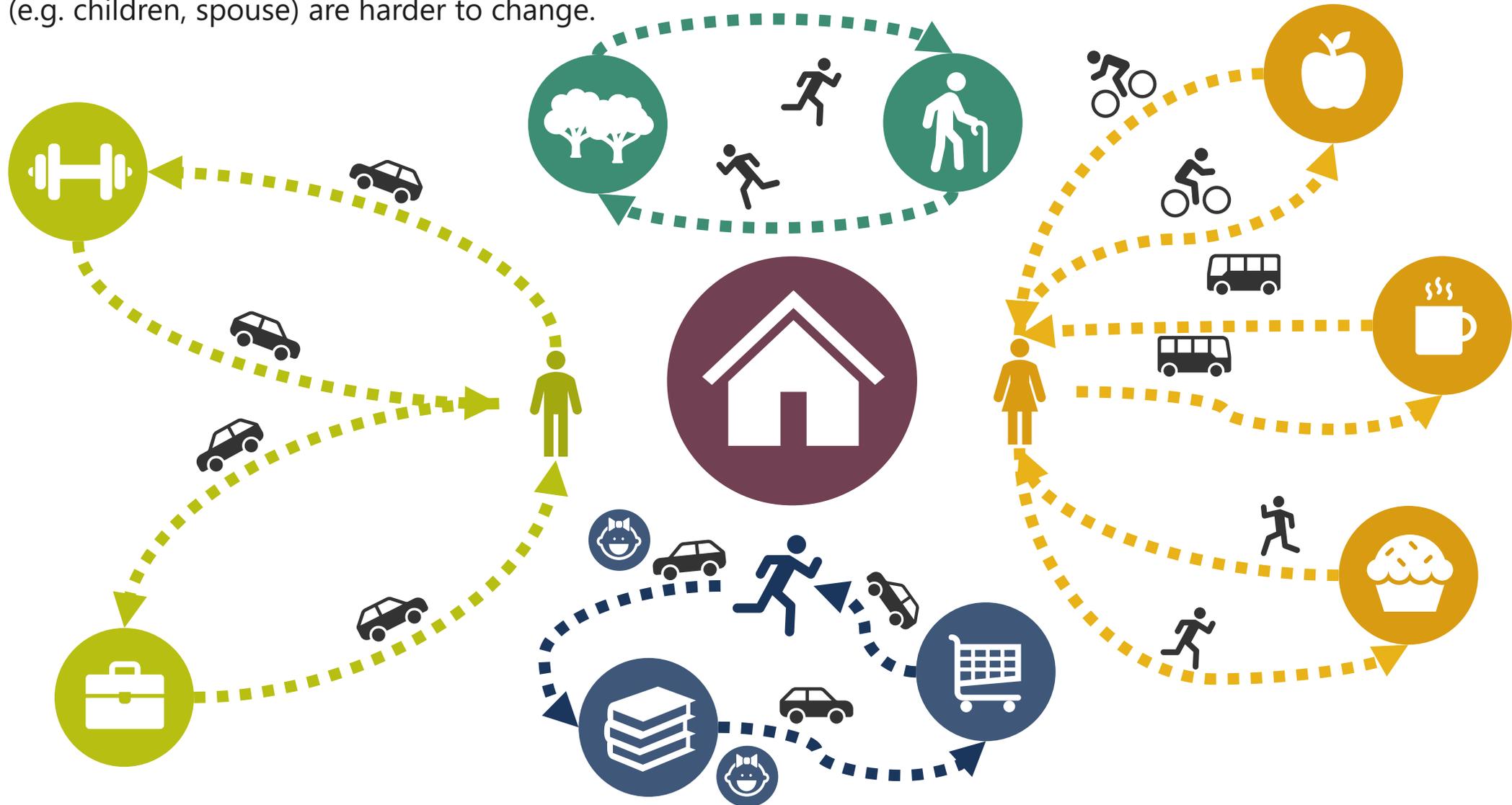
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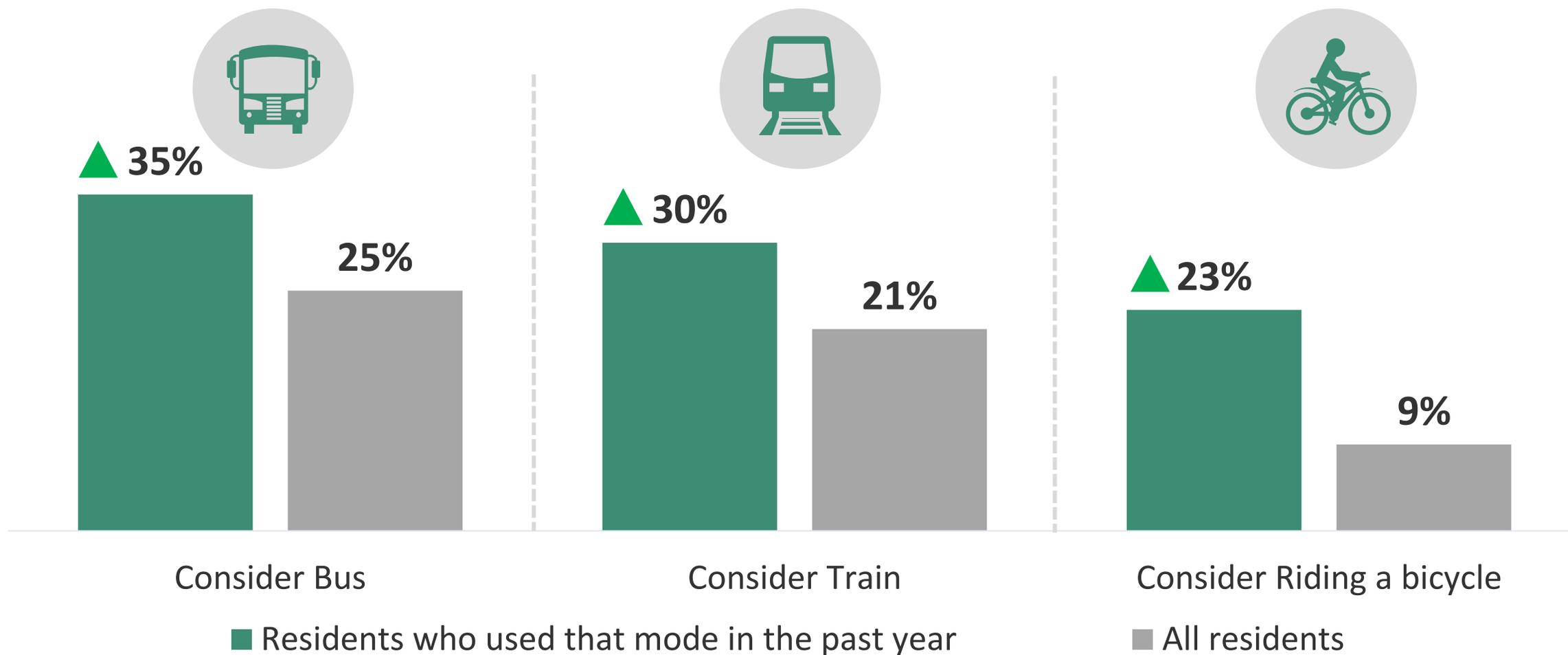
Not all trips are equally easy to change

Before we get into the details, it's important to understand that **Travel Behaviours are dependent**. Chained trips and trips with others (e.g. children, spouse) are harder to change.



Propensity to change varies by exposure/recency of usage

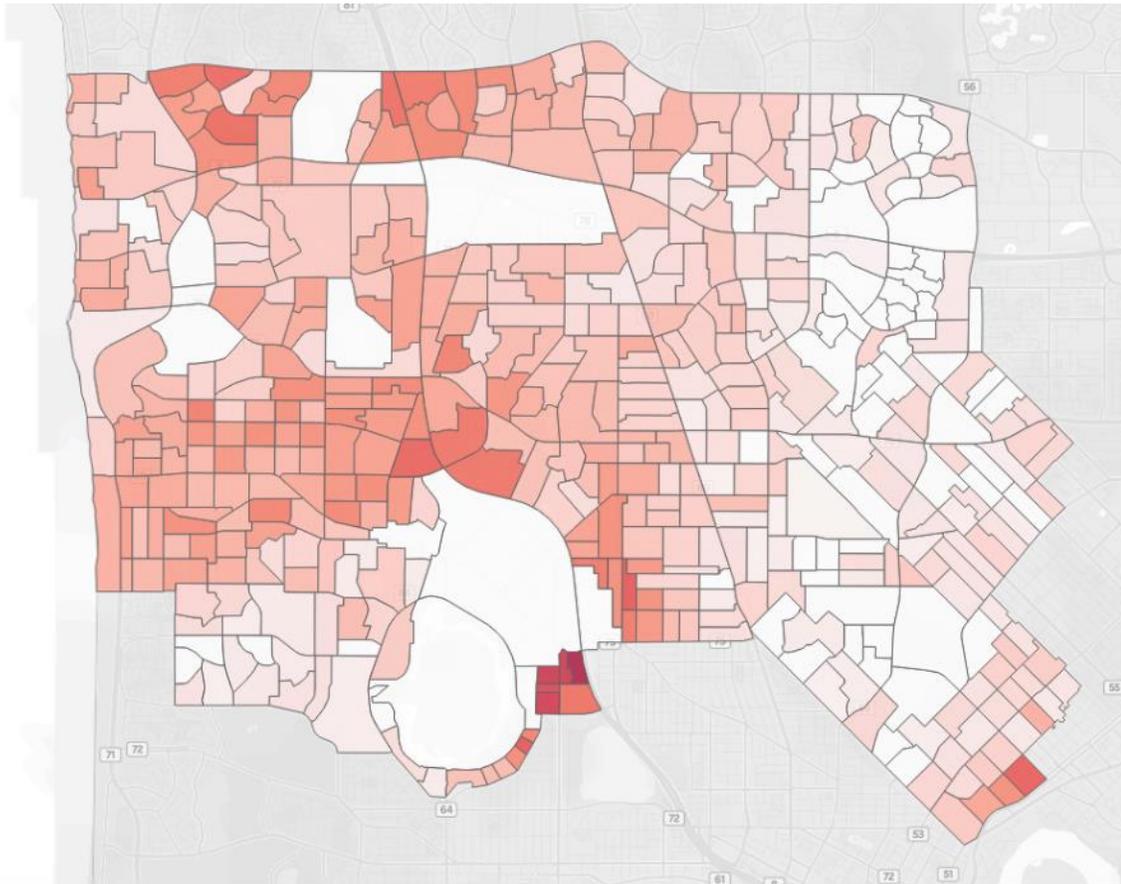
Recent public/active transport usage increases consideration.



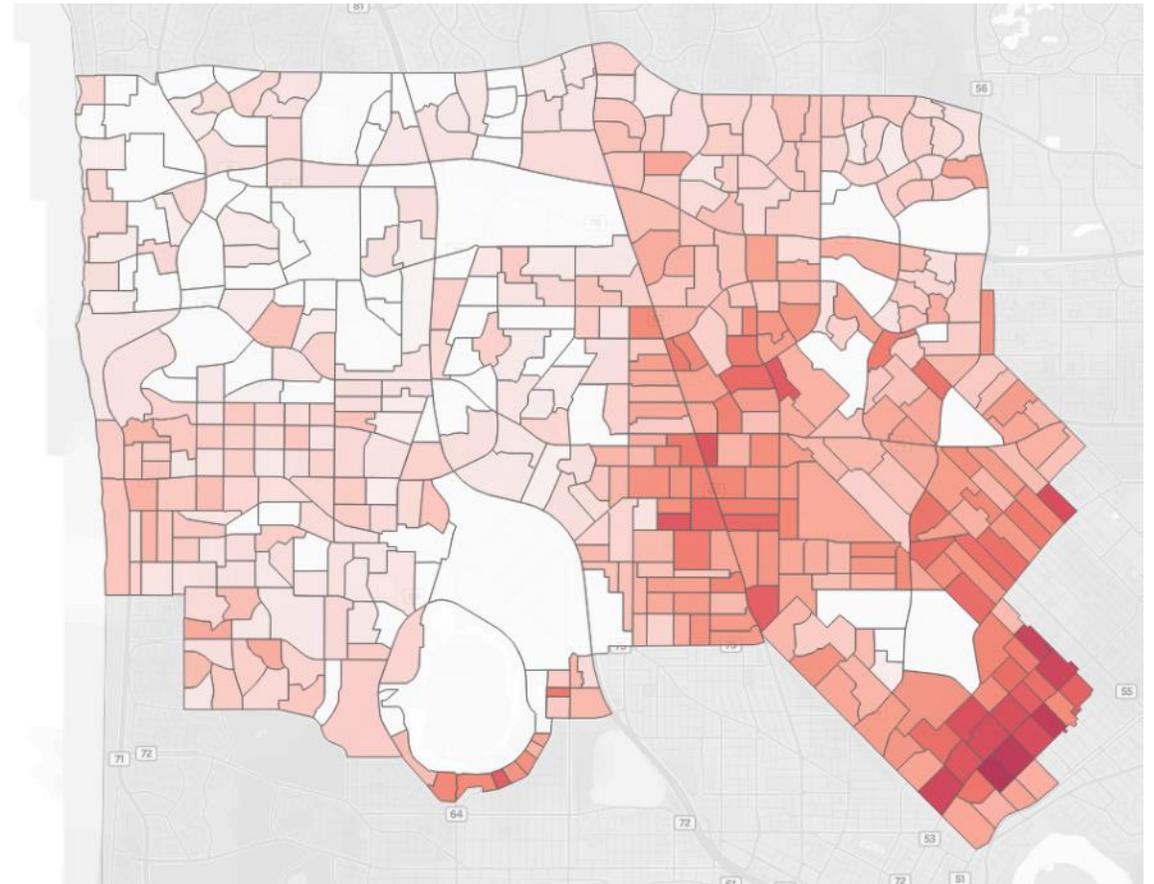
Propensity to change varies by **practical factors** (1 of 3)

Proximity to public transport is a key factor in determining consideration and usage.

Train usage



Bus usage



Propensity to change varies by **practical factors** (2 of 3)

These are **gate openers** to change.

Have a SmartRider card

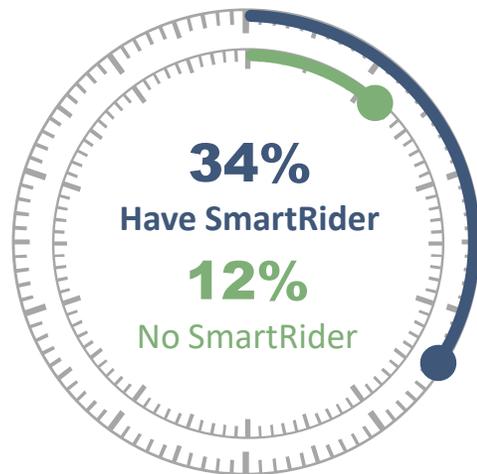
Residents with access to a SmartRider card are more likely to consider Bus and Train for non-work/education trips.

Access to bike

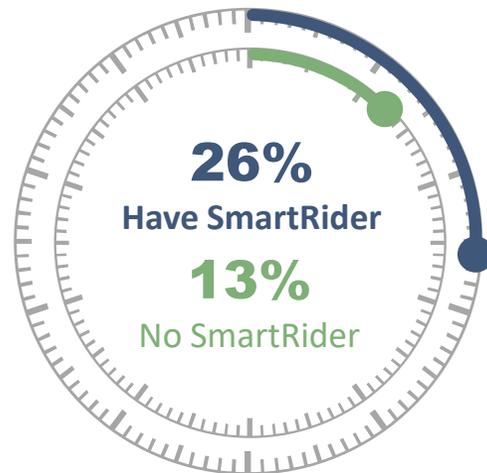
Residents with access to a bike are more likely to consider Riding a bicycle for non-work/education trips.

Access to end of trip facilities

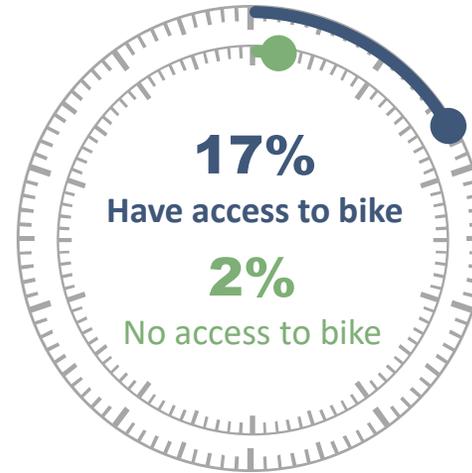
Those with access are more likely to consider Riding a bicycle for non-work trips.



Likelihood to consider
Bus



Likelihood to consider
Train



Likelihood to consider
Riding a bicycle



Likelihood to consider
Riding a bicycle

Propensity to change varies by **practical factors** (3 of 3)

These are **blockers** to change.

Chained trips/having dependents

Residents with children/family who are dependent on them for their travel needs are far less likely to consider Train for work/education trips.



Likelihood to consider
Train

Access to free parking at work/study

Residents with access to free parking are far less likely to consider Bus and Train for work/education trips.



Likelihood to consider
Bus



Likelihood to consider
Train

Needing to drive for work

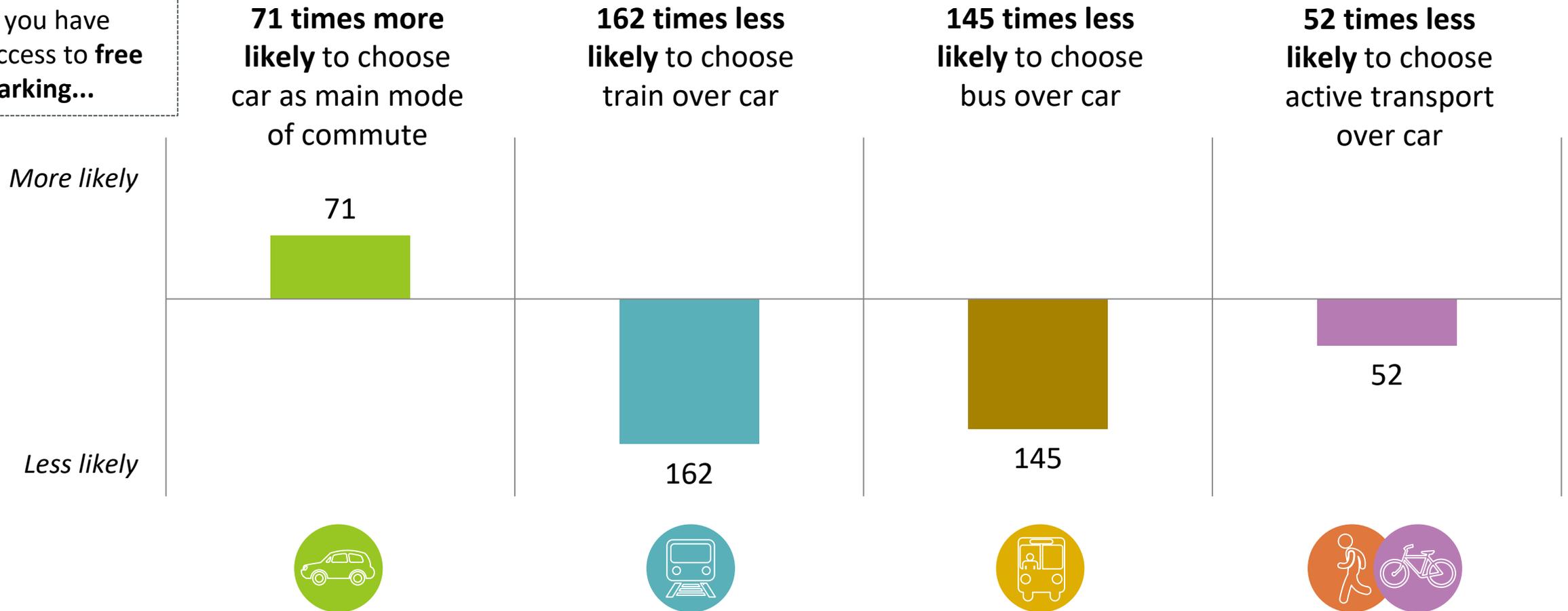
Residents who need to drive for work are less likely to consider Train.



Likelihood to consider
Train

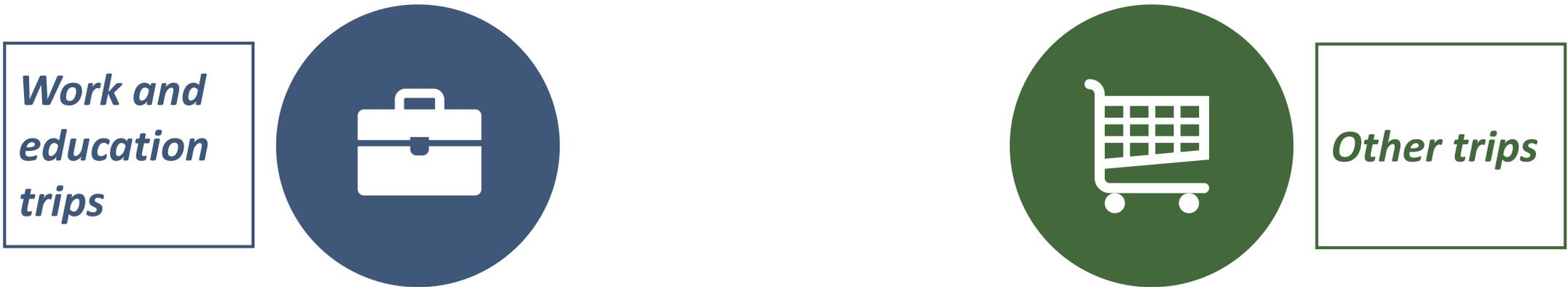
Access to free parking has a major impact on mode choice

If you have access to **free parking...**



Propensity to change therefore varies by **trip type** (1 of 2)

This is because the **dependencies, blockers and facilitators differ by trip type.**



34% would consider alternatives to driving.

Amongst those who used a private vehicle to go to work or place of study in the past week...

64% would consider alternatives to driving.

Amongst those who used a private vehicle for trips not related to work or study in the past week...

Propensity to change therefore varies by **trip type** (2 of 2)

This is because the **dependencies, blockers and facilitators differ by trip type.**



Work and education trips

16% would consider **Bus**

17% would consider **Train**

8% would consider **Walking**

6% would consider **Riding a bicycle**

7% would consider **Taxi, Uber, Rideshare**

Other trips

23% would consider **Bus**

20% would consider **Train**

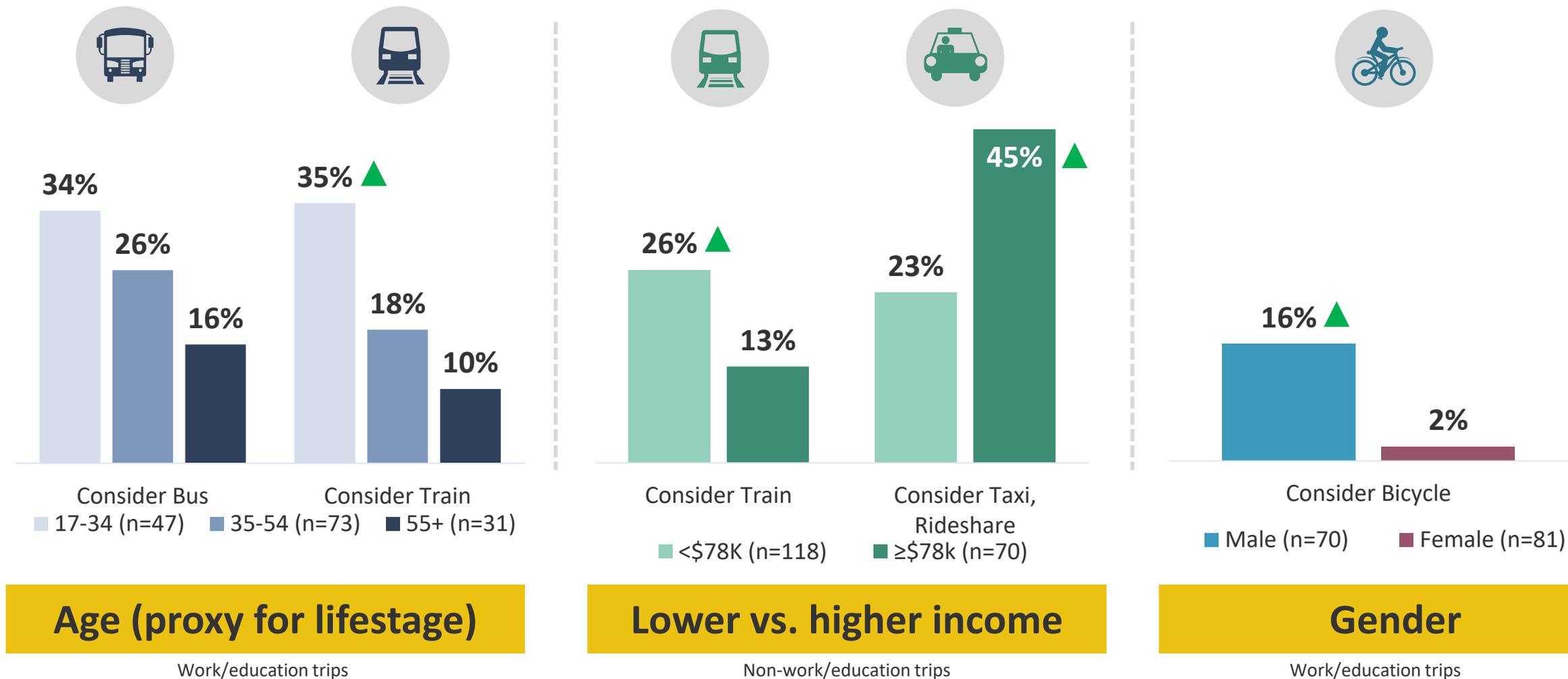
40% would consider **Walking**

8% would consider **Riding a bicycle**

29% would consider **Taxi, Uber, Rideshare**

Propensity to change varies by demographic characteristics

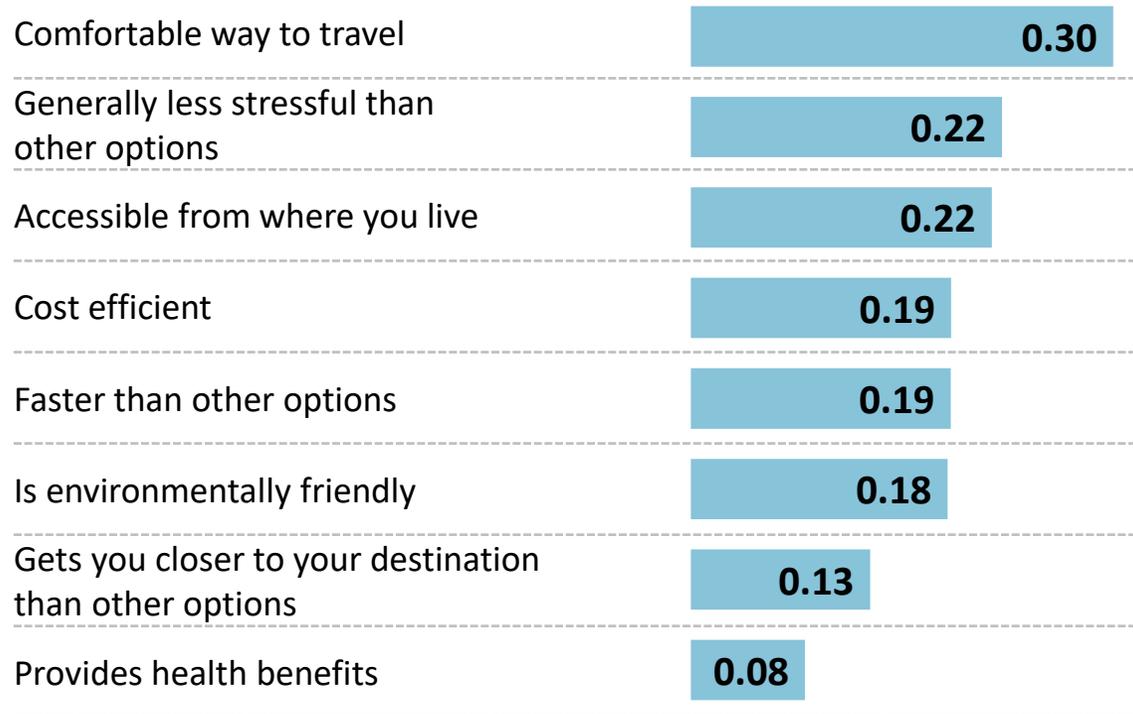
This is because the consequences for change vary by demographic factors.



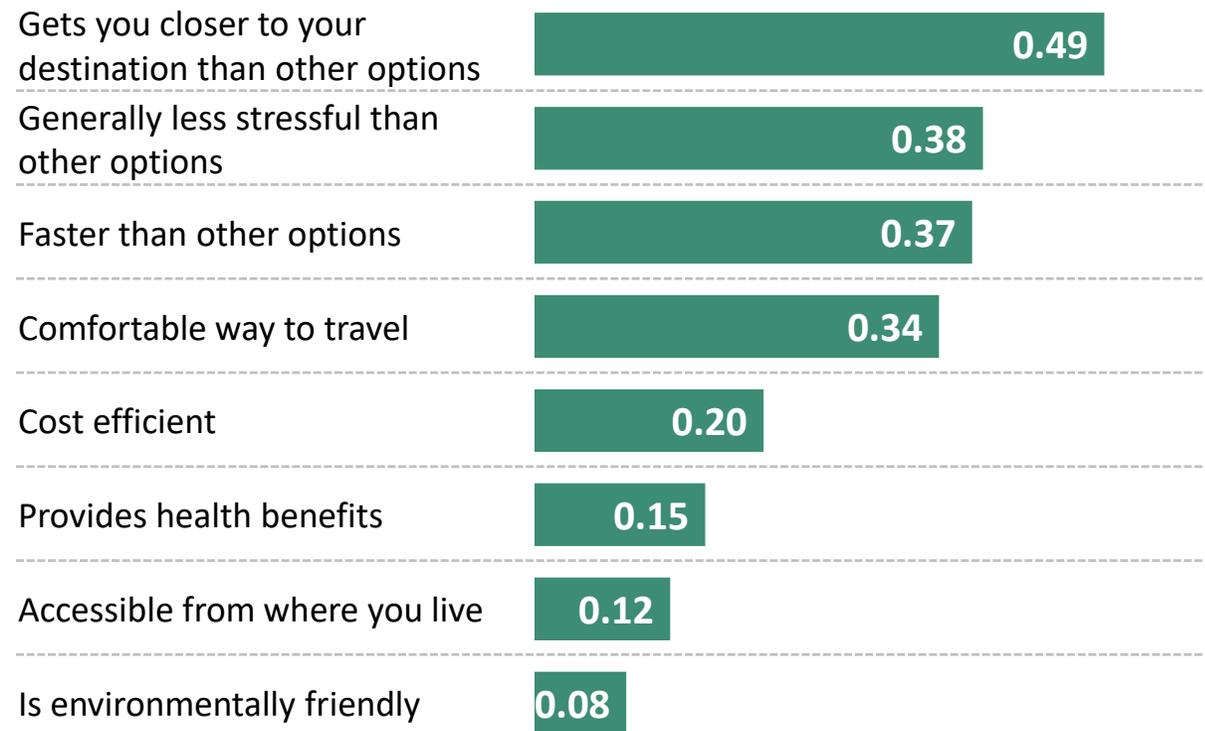
Propensity to change also varies by **attitudinal factors**

As powerful as attitudes are, they don't tend to have as great an impact as practical factors and trip types.

Drivers of train consideration

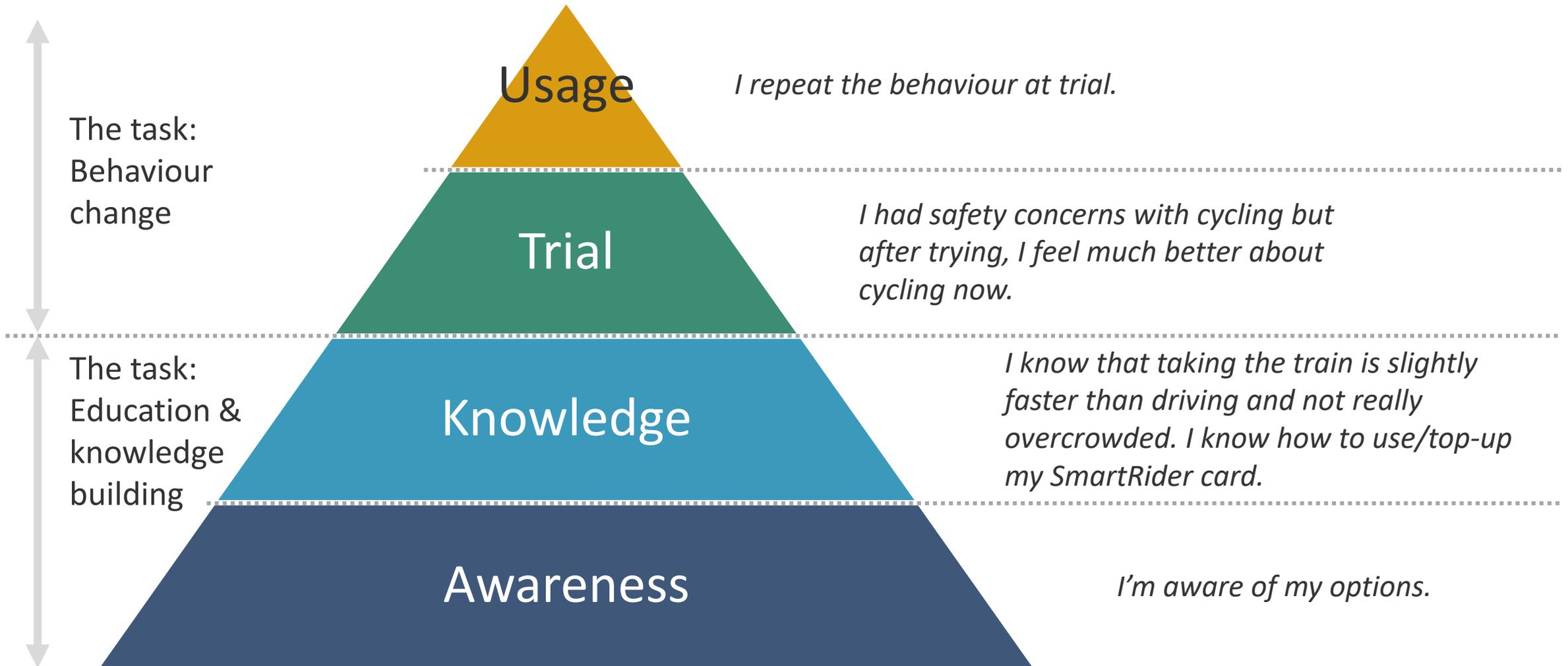


Drivers of bus consideration



The key is therefore not challenging attitudes, rather affecting changes in knowledge.

We affect change through a process of:

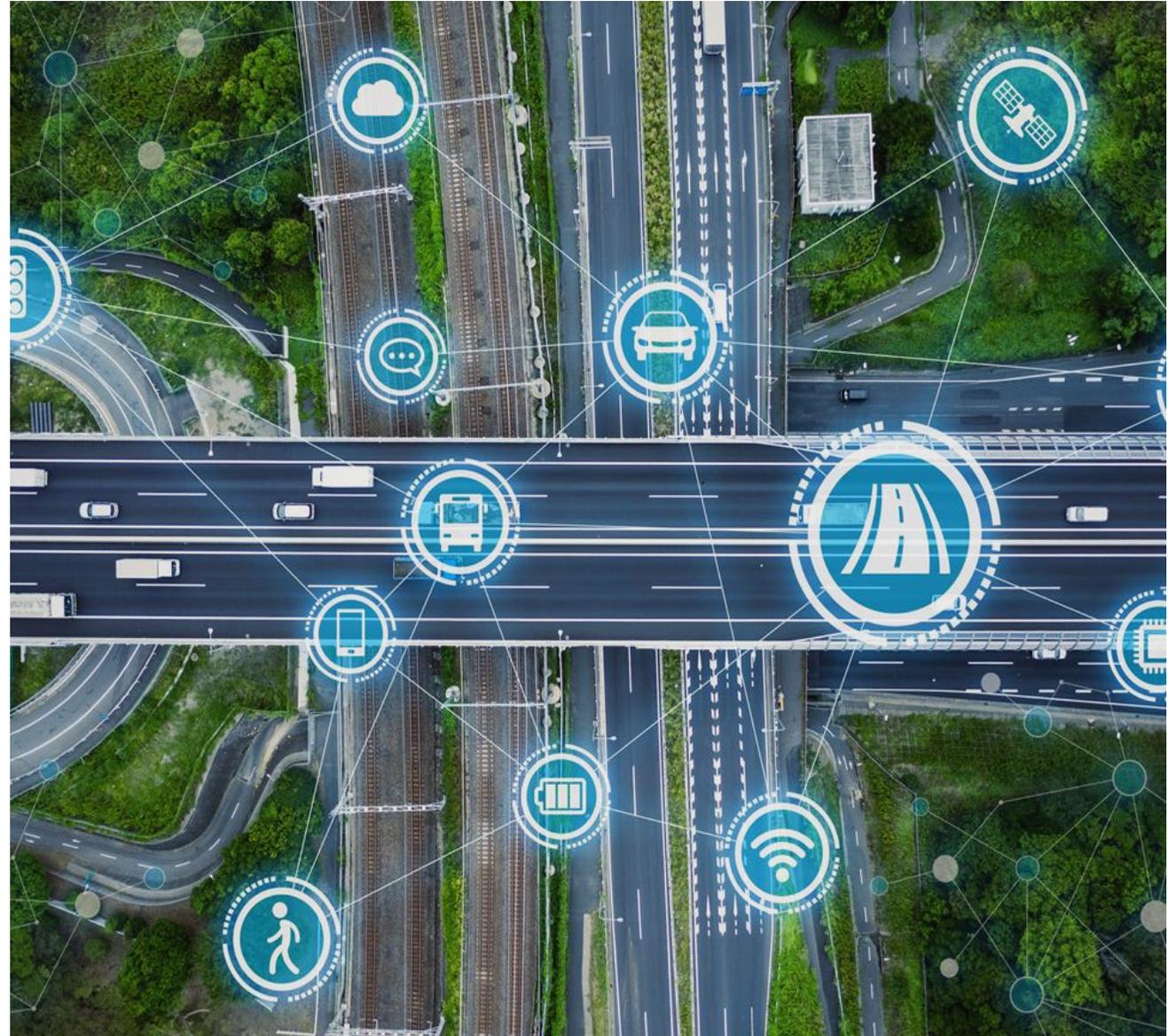


Section 3: Targeting our efforts



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Targeting our efforts

There is a **great propensity and willingness to change**, we just need to show the way.

*Work and
education
trips*



34% would consider alternatives to driving.



Other trips

64% would consider alternatives to driving.

To get the best outcome from our scarce resources, we need to:

- Be very clear about what we are needing to achieve
- Pick our battles to affect the best outcome with these scarce resources

THANK YOU

