

Quantum  
Market  
Research

# Access to social infrastructure consumer research

Full report – May 2024

Prepared by Quantum Market Research

Ref: 24001

---



# Contents

---

About the research **3**

---

Appendix 1: TAFE **18**

---

Appendix 2: TAFE questionnaire **44**

---



# About the research



# Background and objectives

## Background to the project

In its role as the independent advisory body to the Victorian government, Infrastructure Victoria has identified the need for research into Victorians' access to social infrastructure, namely community health services, TAFE and outdoor sporting facilities.

As identified in the 2021-2051 infrastructure strategy, all Victorians will need education, health and recreation service during their lifetime. The presence of, and appropriate access to, this type of social infrastructure helps Victorians attain better education, health, community cohesion, which affects both individual and community wellbeing.

Accessibility, or rather, barriers to accessibility, are broad and can encompass many dimensions.

In conducting this research, Infrastructure Victoria's aim was to identify where access to social infrastructure can be increased to improve social equity for Victorians.

The project included two research components:

- Consumer survey (detailed in this report)
- Spatial accessibility mapping

Findings of the research will inform the development of recommendations for Victoria's 30-year infrastructure strategy.

## Specific consumer research objectives

1. Assess the existing availability, usage, and demand of community health services, TAFEs and outdoor sports facilities for Victorians by geographical areas and key cohorts

---

2. Investigate barriers and enablers for social infrastructure access and usage in Victoria

---

3. Evaluate the most relevant accessibility barriers preventing people from accessing social infrastructure

---

# Social infrastructure types

## The project analyses access to following social infrastructure types:

- TAFE
- Community Health Service Centres
- Outdoor sport fields, including sport fields on Government school grounds

For **TAFE**, respondents (who either personally or their 15–17-year-old child/children currently attend/recently attended TAFE) answered questions on barriers to enrolling in/ attending TAFE on behalf of themselves and their children aged 15-17. Questions on awareness of TAFEs, likelihood to attend TAFE in the future, and barriers to doing so were answered on behalf of the respondent personally.

For **Community Health**, respondents answered questions on current usage, barriers to current usage, and likelihood to use services in the future on behalf of themselves and their family, which was defined to respondents as “all family members who live with you in your household”.

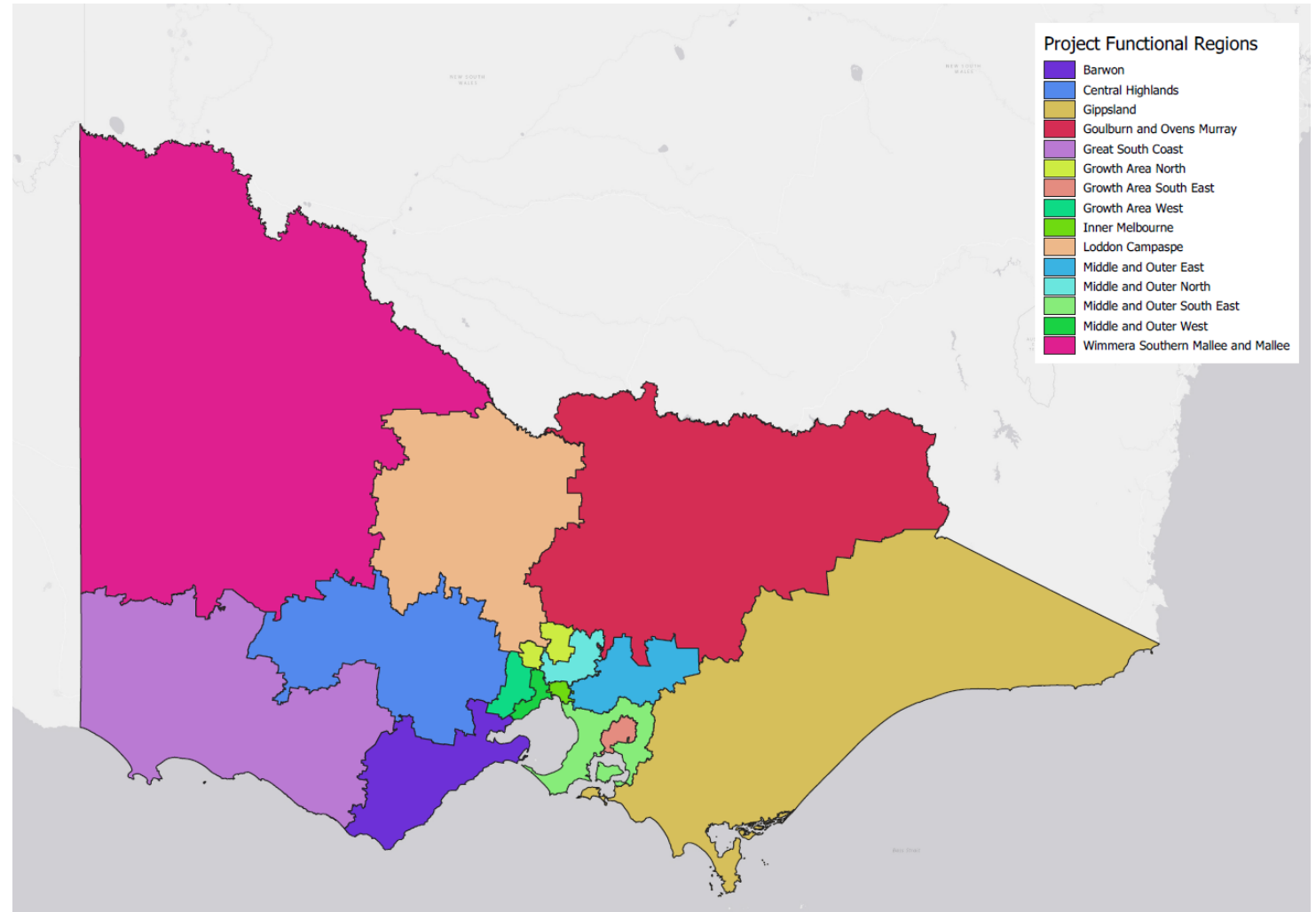
For **outdoor sports fields**, respondents answered questions on current usage, barriers to current usage, likelihood to use in the future and barriers to future usage on behalf of themselves and their children, which was defined to respondents as “child/children aged under 18 years”.



# Regions of Victoria

For both the consumer survey and the separate mapping project, Victoria was broken out into 15 regions:

- 7 regional Victorian regions derived from the regional partnerships
- 8 metro regions based on Infrastructure Victoria's functional urban areas
  - Inner Melbourne
  - Middle and Outer Areas
  - Growth Areas



# Consumer research project methodology

## Research instrument design

Following extensive consultation with Infrastructure Victoria and stakeholders, the research instrument was designed to cover three social infrastructure areas, using routing to ensure that respondents are only asked questions that are relevant to them.

The research instrument was programmed as an online survey, using specialist market research software.

The survey was tested by Quantum Market Research, and by Infrastructure Victoria and its stakeholders.

Feedback was incorporated into survey and re-tested before starting cognitive testing.

## Cognitive testing

15 one-on-one interviews were undertaken with members of the Victorian public (including each of the target cohorts for this research and the general public), to test the survey was easily understood and response codeframes were complete.

Following these interviews, minor changes were made to the survey:

- Minor wording changes to clarify question meanings
- Extra answer options in some questions to ensure completeness
- A clearer definition of 'community health services', including who is eligible to use them, as some people were unfamiliar with the concept of community health / mistook it for other services
- Using a more descriptive list of community health centres, as some people were unfamiliar with Agency & Site names used
- Acknowledgement that some people had only ever used community health centres for COVID-19 testing, which should not be counted within Total demand

## Quantitative survey pilot

The survey was distributed to a small number of respondents (n=90 completed surveys), then data checked to ensure data was being collected correctly, and to assess the survey length.

Following the pilot, minor changes were made to assist the flow and ease of completion for respondents:

- Making the provision of respondents' residential street address non-compulsory
- Reviewing responses provided at 'Other – specify' questions and adding response options to the codeframe for completeness
- Upon reviewing survey length, it was possible to ask all respondents all 3 sections, rather than 2 sections of the survey

## Quantitative data collection

The survey was full-launched to a representative sample of Victorians.

Total sample size n=4,010 respondents.

Further methodological details are shown on the next slide.

# Quantitative survey methodology



Quantitative survey conducted online using an ISO-accredited research access panel



Data collected between 13th March – 27th March 2024



Average survey length 10 minutes



All data has been weighted to be representative of the adult Victorian population by age (under / over 45 years), gender and region (15 regions defined by Infrastructure Victoria).



Eligible audience: People aged 18+ living in Victoria

## Total sample size, n=4,010

The goal of the consumer research was to design and administer a robust, large-scale survey that can inform Infrastructure Victoria about demand and access barriers for key cohorts to three different types of social infrastructure: TAFEs, Community Health Centres and outdoor sports fields in Melbourne and regional Victoria.

- The maximum margin of error (at the 95% confidence interval) on the total sample size is +/- 1.5%.
- Significance testing has been conducted using *Second Order Rao-Scott Test of Independence of a Contingency Tables*.
- Where significance testing has been shown, results are significant at the 95% confidence level.
- The project was carried out in line with the Market Research International Standard, ISO 20252.
- All Quantum Market Research staff, and all of Quantum's contractors, comply with Australian Privacy legislation, and are compliant with The Research Society's Code of Professional Behaviour. This includes ensuring that research participants are dealt with in a transparent, fair and ethical manner throughout the research process.



# Further methodological details

## A number of measures were taken to ensure high quality data:

- Use of an ISO 20252 accredited online panel (Pureprofile) to source respondents
- Internal cleaning of the data by Quantum’s data processing team. This includes removing those who responded to the survey so quickly they could not have been paying attention, those who flatline throughout the survey, and those who give nonsensical answers. We also conducted checks to ensure we did not have too many responses from the same IP address, which may indicate use of a bot.
- Inclusion of a validation question at the beginning of the survey (see right), which asked people to commit to providing thoughtful and honest answers. Asking this as a question rather than simply stating the need for honest answers is more likely to be read\* and attended to and encourage more honest responding. If respondents selected “I can’t promise either way” or “No, I will not”, they were terminated from the survey.

\* Vésteinsdóttir, V., Joinson, A., Reips, UD. *et al.* Questions on honest responding. *Behav Res* **51**, 811–825 (2019).  
<https://doi.org/10.3758/s13428-018-1121-9>

## VALIDATION QUESTION

Data quality and accuracy is extremely important to us. So we have the most accurate understanding of your opinions and needs it is important that you provide thoughtful responses to each question in this survey.

Do you commit to providing thoughtful and honest answers to all the questions in this survey?

*Please select only one*

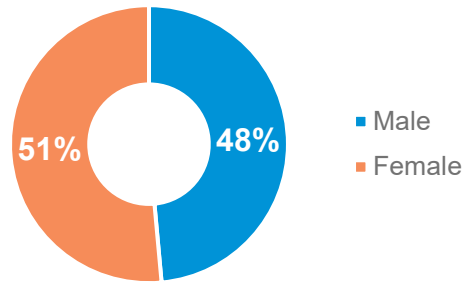
I can't promise either way

Yes, I will

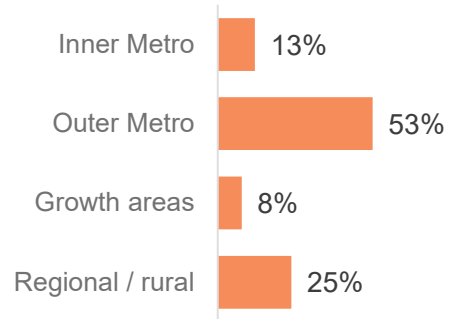
No, I will not

# Respondent profile (weighted percentages)

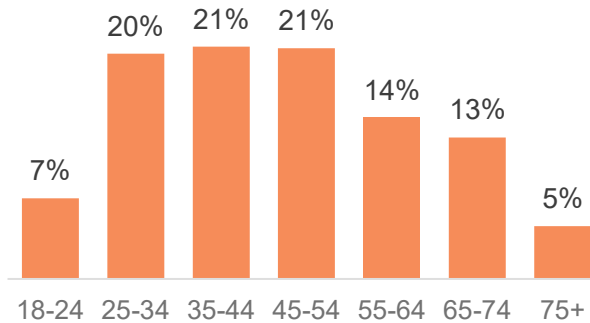
## Gender



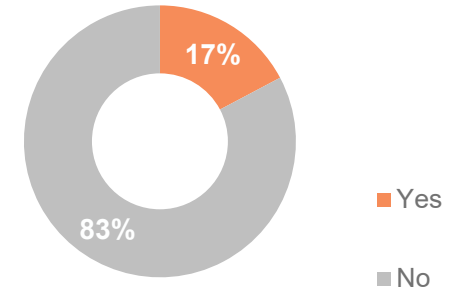
## Area



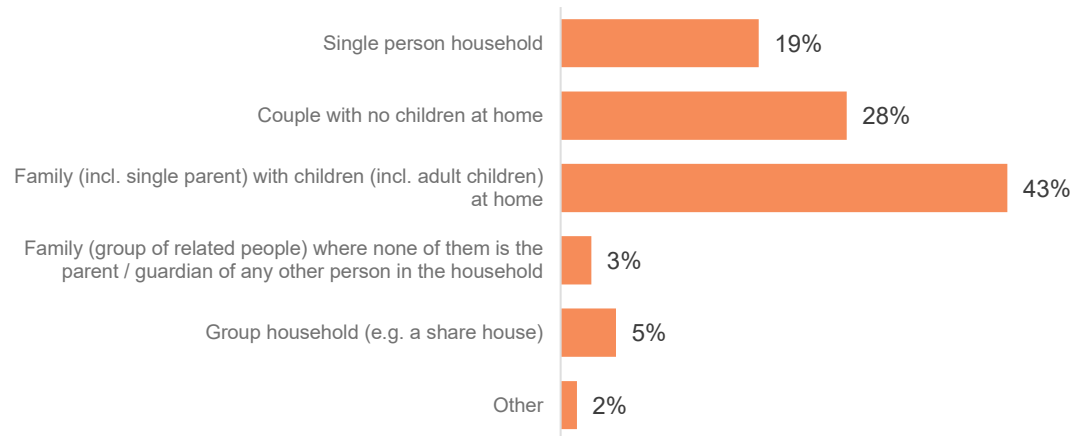
## Age



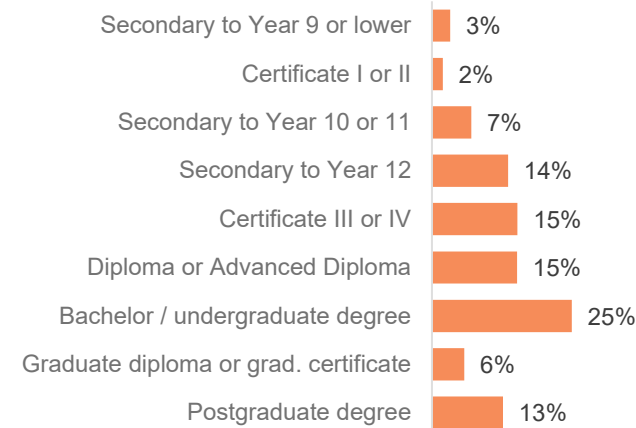
## Languages other than English spoken at home



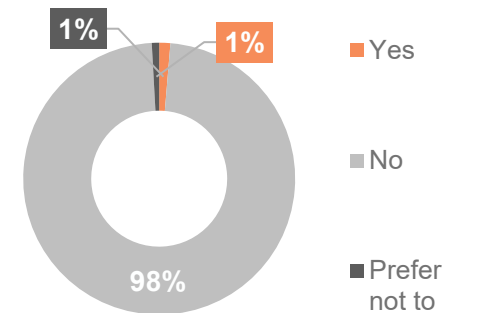
## Household structure



## Education



## Aboriginal and/or Torres Strait Islander



# Respondent profile – comparison to ABS statistics

	Unweighted %	Weighted %	Population % (ABS, 18+ Victorians)
<b>Gender</b>			
Male	46%	48%	49%
Female	54%	51%	51%
Other	<1%	<1%	-
<b>Age</b>			
18-24	8%	7%	11%
25-34	22%	20%	19%
35-44	21%	21%	18%
45-54	20%	21%	16%
55-64	14%	14%	15%
65-74	11%	13%	12%
75+	4%	5%	10%
<b>Speak language other than English</b>			
No	82%	83%	67%
Yes	18%	17%	33%
<b>Aboriginal and/or Torres Strait Islander</b>			
Yes	1%	1%	1%
No	98%	98%	99%
Prefer not to answer	1%	1%	-

	Unweighted %	Weighted %	Population % (ABS, 18+ Victorians)
<b>Household structure (based on household rather than 18+ Victorians)</b>			
Lone person household	20%	19%	25%
Family household with no dependent children present	39%	39%	35%
Family household with dependent children present	35%	35%	30%
Group household	6%	5%	4%
Other	2%	2%	6%
<b>Highest level of educational attainment</b>			
Secondary education to Year 9 or lower	3%	3%	9%
Certificate I or II	2%	2%	<1%
Secondary education to Year 10 or 11	7%	7%	13%
Secondary education to Year 12	13%	14%	17%
Certificate III or IV	15%	15%	16%
Diploma or Advanced Diploma	15%	15%	11%
Bachelor / undergraduate degree	26%	25%	22%
Graduate diploma or graduate certificate	6%	6%	3%
Postgraduate degree	13%	13%	9%
Other	<1%	<1%	-
Prefer not to answer	<1%	<1%	-

# Respondent profile – comparison to ABS statistics

	Unweighted %	Weighted %	Population % (18+ Victorians)
<b>Region (original 15 regions we sampled to)</b>			
Inner Melbourne	17%	13%	13%
Middle East	14%	16%	16%
Middle South East	16%	18%	18%
Middle West	7%	8%	8%
Middle North	13%	12%	12%
Growth Area Southeast	3%	2%	2%
Growth Area North	3%	3%	3%
Growth Area West	4%	4%	4%
Barwon, including Geelong and Ocean Grove	6%	5%	5%
Centre Highlands, including Ballarat and Bacchus Marsh	2%	3%	3%
Gippsland, including Warragul, Moe, Morwell, Traralgon and Bairnsdale	3%	5%	5%
Goulburn and Ovens Murray, including Shepparton, Benalla, Wangaratta and Wodonga	2%	5%	5%
Great South Coast, including Colac, Warrnambool and Portland	2%	2%	2%
Loddon Campaspe, including Bendigo, Castlemaine and Kyneton	3%	4%	4%
Wimmera Southern Mallee and Mallee, including Horsham and Mildura	3%	2%	2%


	Unweighted %	Weighted %	Population % (18+ Victorians)
<b>Region (final 8 regions reported by)</b>			
Inner Melbourne	17%	13%	13%
Middle and Outer East	14%	16%	16%
Middle and Outer South East	16%	18%	18%
Middle and Outer West	7%	8%	8%
Middle and Outer North	13%	12%	12%
Growth Areas	10%	8%	8%
Regional City Regions	11%	12%	12%
Rest of Victoria	11%	13%	13%

# Target quotas vs. quotas achieved by region

	Target Quotas					Quotas Achieved						
	Male		Female		TOTAL	Male		Female		Non-binary / other gender		TOTAL
	Under 45	45+	Under 45	45+		Under 45	45+	Under 45	45+	Under 45	45+	
Inner Melbourne	211	110	226	153	700	204	123	227	138	4	1	697
Middle and Outer east	128	149	128	170	575	130	148	127	171	1	0	577
Middle and Outer south east	141	163	140	181	625	139	162	139	182	2	1	625
Middle and Outer west	76	70	77	77	300	79	67	77	77	0	0	300
Middle and Outer north	139	96	134	151	520	143	101	122	156	1	1	524
Growth Area south east	30	11	36	23	100	27	13	34	27	0	0	101
Growth Area north	39	16	39	26	120	34	16	43	26	0	1	120
Growth Area west	53	26	52	29	160	52	28	57	29	0	0	166
Barwon	56	54	59	81	250	54	55	59	82	0	0	250
Central Highlands	21	28	21	30	100	22	27	22	29	0	0	100
Gippsland	24	43	25	46	138	23	43	28	44	0	0	138
Goulburn and Ovens Murray	20	30	18	32	100	18	29	20	33	0	0	100
Great South Coast	18	31	18	33	100	14	13	33	39	1	0	100
Loddon Campaspe	20	33	21	35	109	19	32	23	35	0	0	109
Wimmera Southern Mallee and Mallee	12	13	54	24	103	14	19	37	32	1	0	103
	988	873	1048	1091	4000	972	876	1048	1100	10	4	4010

Note: At the last census (2021) ABS did not publish figures for non-binary / other gender, so it was not possible to quotas by this group.

When weighting the data, non-binary / other respondents were assigned a weight of 1 for gender, and the remainder of the sample was weighted to ABS statistics.

 Indicates quotas achieved were over (blue) or under (red) the target quotas by greater than 20% variance.

# Quotas achieved and weighting

The sampling for this survey ultimately met almost all the quotas set to achieve a representative sample across Victoria. However, online panels tend to have less sample in regional areas, and so we saw some challenges in attaining a representative sample (as highlighted on the previous slide in red), particularly in:

- Wimmera Southern Mallee region (difficulty reaching females under 45 years).
- Great South Coast region (difficulty reaching males, both over 45 and under 45).

Respondents from across each region were invited to participate; in regional areas, anyone living in that area could complete the survey provided we had not yet closed our quotas. This included people living in major and minor regional towns, as well as those living in rural areas outside of town.

The data has been weighted by age, gender and region to adjust any discrepancies and ensure that findings are adequately representative of the Victorian population. The table to the right breaks down the weighting approach.

Once the final sample had been weighted, the proportion of respondents in each region, gender and age group was reflective of the total population of Victoria.

	Male		Female		Total
	Under 45	45+	Under 45	45+	
<b>Inner Melbourne</b>	3.78%	2.42%	3.97%	2.67%	12.84%
<b>Middle and Outer east</b>	3.60%	4.16%	3.58%	4.78%	16.12%
<b>Middle and Outer south east</b>	3.94%	4.57%	3.93%	5.08%	17.52%
<b>Middle and Outer west</b>	2.06%	1.80%	2.01%	1.93%	7.80%
<b>Middle and Outer north</b>	2.94%	2.90%	2.91%	3.25%	12.00%
<b>Growth Area south east</b>	0.54%	0.31%	0.56%	0.34%	1.75%
<b>Growth Area north</b>	0.87%	0.55%	0.88%	0.59%	2.89%
<b>Growth Area west</b>	1.21%	0.64%	1.18%	0.67%	3.70%
<b>Barwon</b>	1.12%	1.38%	1.13%	1.56%	5.19%
<b>Central Highlands</b>	0.66%	0.89%	0.68%	0.97%	3.20%
<b>Gippsland</b>	0.80%	1.44%	0.83%	1.54%	4.61%
<b>Goulburn and Ovens Murray</b>	0.87%	1.39%	0.89%	1.49%	4.64%
<b>Great South Coast</b>	0.29%	0.50%	0.29%	0.55%	1.63%
<b>Loddon Campaspe</b>	0.72%	1.17%	0.75%	1.26%	3.90%
<b>Wimmera Southern Mallee and Mallee</b>	0.43%	0.66%	0.42%	0.70%	2.21%

# Regions used in analysis and reporting

In this report, the 15 regions have been aggregated to 8 regions as shown below. This is to ensure that sample sizes are sufficient within each of the 8 regions to conduct robust analysis.

15 regional quotas within the survey	8 regions used for analysis	Sample size
Inner Melbourne	Inner Melbourne	697
Middle and Outer east	Middle and Outer east	577
Middle and Outer south east	Middle and Outer south east	625
Middle and Outer west	Middle and Outer west	300
Middle and Outer north	Middle and Outer north	524
Growth Area south east		
Growth Area north	Growth areas	387
Growth Area west		
Barwon		
Central Highlands	Regional city regions	459
Loddon Campaspe		
Gippsland		
Goulburn and Ovens Murray	Rest of Victoria	441
Great South Coast		
Wimmera Southern Mallee and Mallee		

# Target cohorts

The definition of each target cohort has been provided by Infrastructure Victoria and associated stakeholders to include the following:

TAFE target cohort:

- Adults with no or low-level post-school qualifications or have recent experience of unemployment or underemployment
- Those with no prior certificate III – aged 20 to 64
- Early School Leavers – aged 15 to 19

Community Health Centre target cohort:

- Those with a health care concession card or pensioner card
- Aboriginal and/or Torres Strait Islander peoples
- People on low or medium incomes\*

Those with high health needs:

- People with a chronic health condition\*\* or a disability^

*Note: respondents in this cohort may or may not meet the eligibility criteria for Community Health.*

Cohort	Sample size	Proportion of total sample
Cohort 1: Those who have used Community Health Centres in last 5 years	n=1,499	38%
Cohort 2: Target cohort for Community Health Centres	n=2,505	64%
Cohort 3: Those with high health needs	n=1,552	39%
Cohort 4: Those enrolled at TAFE in the last 5 years	n=504	12%
Cohort 5: TAFE target cohort - no prior Cert III aged under 65, or 15-17 not in full time school or employment	n=747	19%

\* Low or medium incomes defined as:

Individual income ranges: Low income range: < \$41,556, Medium income range: > \$41,556 and < \$91,648;  
 Couple income range: Low income range: < \$63,576, Medium income range: > \$63,576 and < \$122,518;  
 Family with one child income ranges for Community Health: Low income range: < \$70,175, Medium income range: > \$70,175 and < \$126,027.

The income value has been adjusted to 2021 for inflation, plus \$6,206 per additional child)

\*\* Chronic long-term health conditions defined as arthritis, asthma, cancer (including remission), dementia (including Alzheimer's), Diabetes (excluding gestational diabetes), heart disease (including heart attack or angina), kidney disease, lung condition (including COPD or emphysema), mental health conditions (including depression or anxiety), stroke, or any other long term health condition.

^ Disability defined as any limitation, restriction or impairment which restricts everyday activities and has lasted, or is likely to last, for six months or longer: sensory and/or speech disability, intellectual disability, physical disability, psychosocial disability, head injury, stroke or acquired brain injury, or other disability.



# Explaining the MaxDiff analysis

As part of the survey, it was important to understand at a high level people's hierarchy of priorities in relation to attending TAFE or a community health service. While a ranking task would have provided this information, ranking does not provide insight into how much more one element is valued over another. In order to achieve this outcome, a MaxDiff approach was used.

This approach takes a set of elements that need to be ordered (in this case, in terms of most vs. least important elements), and presents respondents with a subset of these elements across a range of tasks. Respondents are asked to indicate the element of most and least importance to them in each task. The choices respondents make are then analysed to determine relative preference between items.

For the MaxDiffs, respondents were presented with different combinations of the items they needed to rank in terms of importance when considering going to TAFE or a Community Health Centre respectively. The TAFE MaxDiff involved six elements that were presented over six tasks, with four items presented per task, while the Community Health Centre MaxDiff included seven elements presented over seven tasks, with four items presented per task. Anyone who completed the TAFE MaxDiff did not complete the community health service MaxDiff, as we did not want to overburden respondents with two MaxDiffs in a single survey.

*Example of how the MaxDiff task looked for the TAFE MaxDiff*

For TAFE, the following attributes were tested:

- The TAFE course I want to study is available at a TAFE campus near me
- The fees for TAFE courses are reasonable
- The course is high quality
- Teachers are friendly and understand my needs
- Easy to get to via public transport
- Good enough internet access to study online

For community health services, the following attributes were tested:

- Opening hours are long enough on weekdays or weekends
- Easy to physically access
- The cost of services are reasonable
- Don't have to wait too long for an appointment
- Quality of care from staff is good
- It's easy to find out what services are available or whether I am eligible to use the services
- Easy to get to via public transport

Considering only these 4 aspects, which is the Most Important and which is the Least Important when considering going to TAFE?

Most Important		Least Important
<input type="radio"/>	The fees for TAFE courses are reasonable	<input type="radio"/>
<input type="radio"/>	Easy to get to via public transport	<input type="radio"/>
<input type="radio"/>	Teachers are friendly and understand my needs	<input type="radio"/>
<input type="radio"/>	Good enough internet access to study online	<input type="radio"/>

# Appendix 1: TAFE

Awareness

Usage

Barriers to access

Future interest

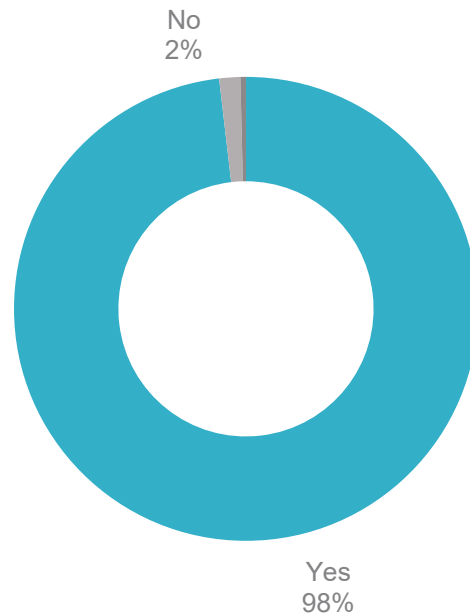
Reasons for rejection



# Awareness of TAFE was almost universal – 98% of Victorians had heard of it

## Awareness of TAFE

Base: All respondents (n=4,010)



Q.10. Before today, had you heard of TAFE?

Those with children at home were significantly more likely than average to have heard of TAFE (99%) whereas those living in a group household were significantly less likely to be aware (94%).

Those born in Australia were significantly more likely to have heard of TAFE than those born outside Australia (99%, vs. 96%), and those who only speak English were significantly more likely to have heard of TAFE than those who speak a language other than English (99%, vs. 95%).

Those whose household income is less than \$52k were significantly less likely than average to have heard of TAFE (97%).

Those living in the Growth areas were significantly less likely than average to have heard of TAFE (97%).

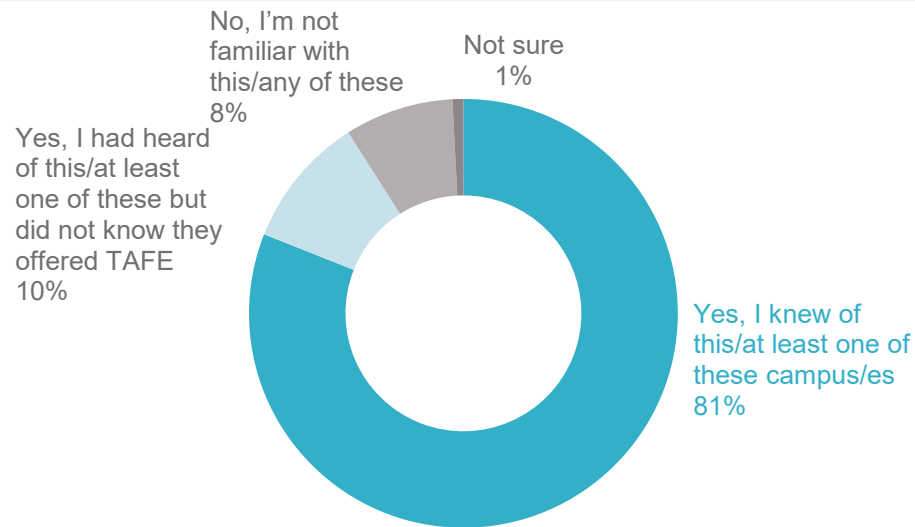
	% Yes aware
Cohort 4: Those enrolled at TAFE in the last 5 years	98%
Cohort 5: TAFE target cohort - no prior Cert III aged under 65, or 15-17 not in full time school or employment	<b>97%</b>

# Eight in ten (81%) of those with a TAFE campus in their local area were aware of at least one campus when prompted

## Awareness of TAFE campuses in local area

Base: Those with at least one TAFE in the region (n=3,743)

Respondents saw the names and addresses of specific TAFE campuses in their region, based on the respondent's postcode. This was to ensure that respondents answered this question based on specific TAFE campuses, rather than other educational institutions.



Q.12. Before today, were you aware of any of these campuses?

Demographic groups more likely to know specific TAFE campuses in their local area included:

- Women (83%)
- Those with children at home (84%)
- Those born in Australia (83%)
- Those who only speak English (82%)
- Those who have lived in their area for 5+ years (84%)

	% Yes, aware of this/at least one of these campus/es
Cohort 4: Those enrolled at TAFE in the last 5 years	90%
Cohort 5: TAFE target cohort - no prior Cert III aged under 65, or 15-17 not in full time school or employment	77%

There were also differences by region, shown on the next slide.

# Awareness of TAFE campuses was significantly lower than average in Growth areas and the Middle and Outer west

## Awareness of TAFE campus in local area, by location

Base: Those with at least one TAFE in the region

	Average - all regions	Inner Melbourne	Middle and Outer east	Middle and Outer south east	Middle and Outer west	Middle and Outer north	Growth areas	Regional city regions	Rest of Victoria
Sample size	3743	697	577	625	300	524	120	459	441
Yes, I knew of this TAFE campus	81%	83%	90%	84%	69%	85%	17%	78%	85%
Yes, I had heard of this but did not know it offered TAFE	10%	13%	7%	10%	19%	10%	10%	10%	6%
No, I'm not familiar with this	8%	4%	3%	5%	10%	5%	73%	10%	9%
Not sure	1%	0%	0%	1%	1%	1%	0%	2%	1%

Q.12. Before today, were you aware of any of these campuses?

# Those in Growth areas, the Middle and Outer west and Inner Melbourne were least likely to be aware of any TAFEs in their area

## Unprompted awareness of TAFEs in local area, by location

Base: All respondents

	Inner Melbourne	Middle and Outer east	Middle and Outer south east	Middle and Outer west	Middle and Outer north	Growth areas	Regional city regions	Rest of Victoria
Sample size	479	469	476	207	392	253	356	360
	Holmesglen Institute 27%	Box Hill Institute 52%	Chisholm Institute of TAFE 56%	Victoria University 42%	Kangan Institute 35%	Kangan Institute 26%	The Gordon TAFE 42%	TAFE Gippsland 15%
	Box Hill Institute 23%	Holmesglen Institute 42%	Holmesglen Institute 34%	Kangan Institute 22%	Melbourne Polytechnic 30%	Chisholm Institute of TAFE 21%	Bendigo TAFE 24%	GOTAFE - Goulburn Ovens Institute of TAFE 12%
	Kangan Institute 20%	Swinburne University of Technology 33%	Frankston 13%	The Gordon TAFE 18%	RMIT (Royal Melbourne Institute of Technology) 19%	Victoria University 19%	Federation University 15%	Wodonga TAFE 11%
	RMIT (Royal Melbourne Institute of Technology) 19%	Chisholm Institute of TAFE 12%	Box Hill Institute 9%	RMIT (Royal Melbourne Institute of Technology) 15%	Box Hill Institute 16%	RMIT (Royal Melbourne Institute of Technology) 12%	Geelong 7%	South West TAFE 9%
	Swinburne University of Technology 18%	RMIT (Royal Melbourne Institute of Technology) 8%	Swinburne University of Technology 8%	Footscray 11%	NMIT 11%	The Gordon TAFE 11%	Kangan Institute 5%	Morwell & Wangaratta 7%

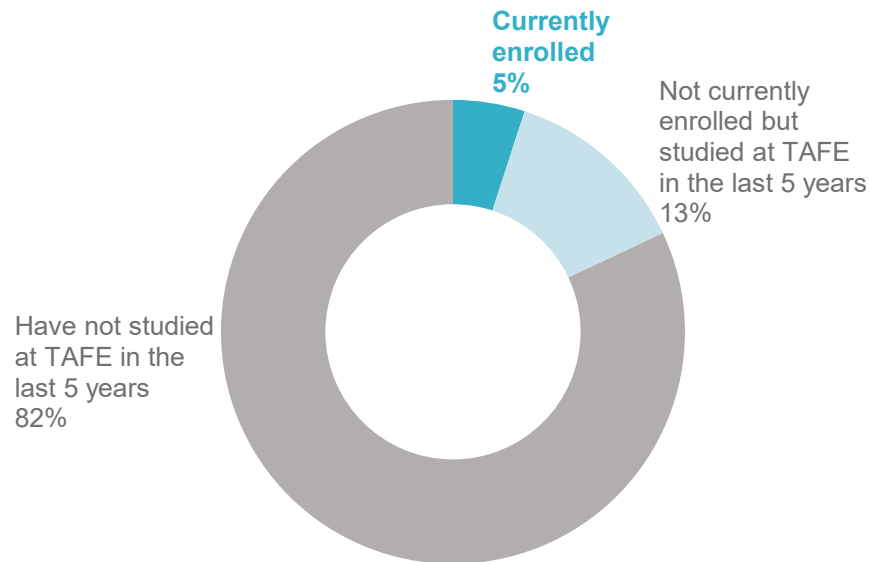
Respondents named TAFEs they were aware of open-ended, and verbatim responses have been coded into themes. This highlights that some respondents are only aware of the general location of TAFEs rather than the brand names, e.g. 'Frankston' instead of Chisholm Institute's Frankston campus, or 'Footscray' instead of Victoria University's Footscray campus (outlined in orange). Some respondents still referenced previous names, e.g. 'NMIT' instead of Melbourne Polytechnic (outlined in blue).

Q11. Are you aware of any TAFE institutes in your suburb/town or surrounding suburbs/towns?  
Asked open-ended and coded

# One in five (18%) Victorian adults (aged 18+) have personally attended TAFE in Victoria in the last 5 years

## TAFE attendance

Base: All respondents (n=4,002)



Base: Those who have personally attended TAFE in the last 5 years (n=717)  
 Q14. Are you currently enrolled in TAFE?  
 Q13. Have you personally studied any TAFE courses in the past five years?

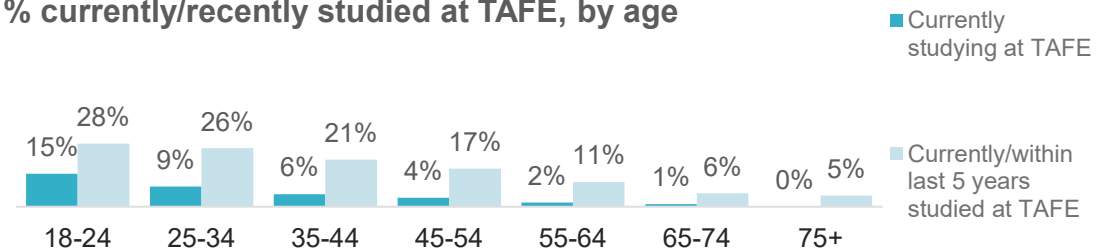
Men were significantly more likely to currently be studying at TAFE (6%, vs. 4% of women).

Those who speak a language other than English (8%) and those who identify as Aboriginal and/or Torres Strait Islander\* (24%) were significantly more likely than average to currently be studying at TAFE.

Those living in the Middle and Outer north region (7%) were significantly more likely than average to currently be studying at TAFE and those in the Middle and Outer south east region (4%) significantly less so, but there were no other regional differences.

There were considerable differences by age group, with younger Victorians more likely to currently be/have recently studied at TAFE.

### % currently/recently studied at TAFE, by age

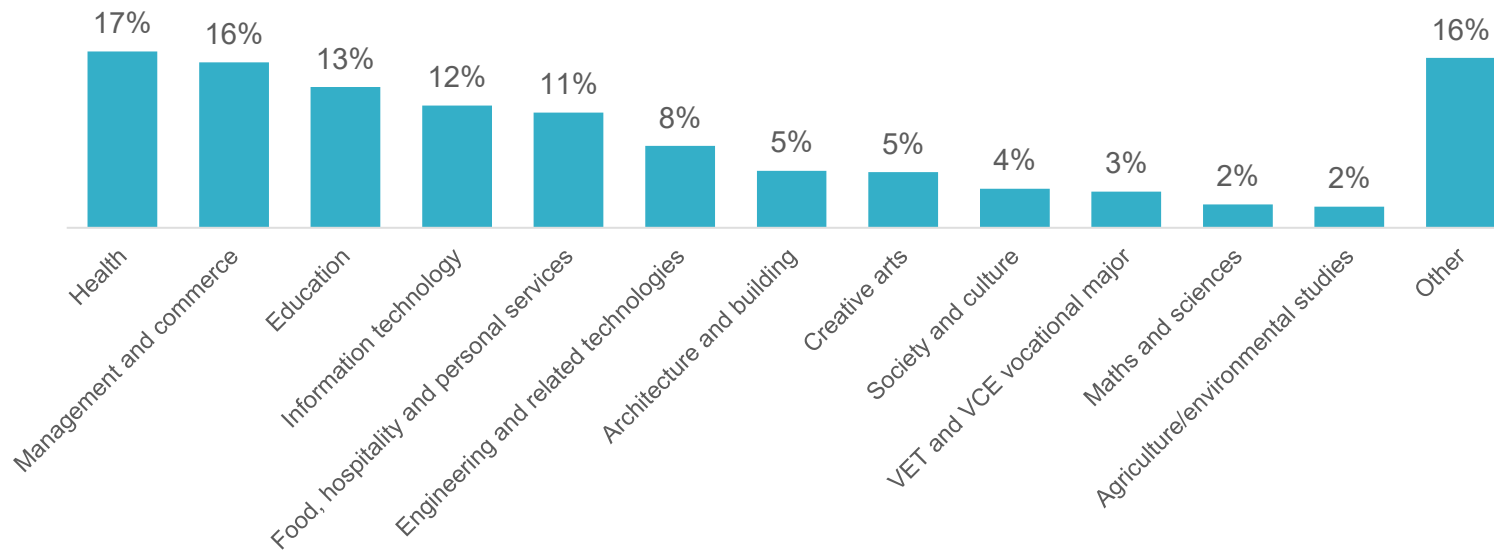


\* Small sample size (n=54), margin of error +/-13pp. Figure should be used with caution

# Health and Management & commerce were the most popular subject areas, but there were gender differences

## Subjects studied at TAFE

Base: Those who are currently enrolled in TAFE/have studied at TAFE in the past 5 years (n=718)



Q14c. And which subject(s) did the course(s) you were/are studying at a Victorian TAFE fall into?

There were some differences in subjects studied by gender, with the statistically significant differences shown in the table below.

Those living in Inner Melbourne (11%) and the Middle and Outer east region (9%) were significantly more likely to be studying/have studied Creative arts, and those in the rest of Victoria were more likely to be studying something else (26%).

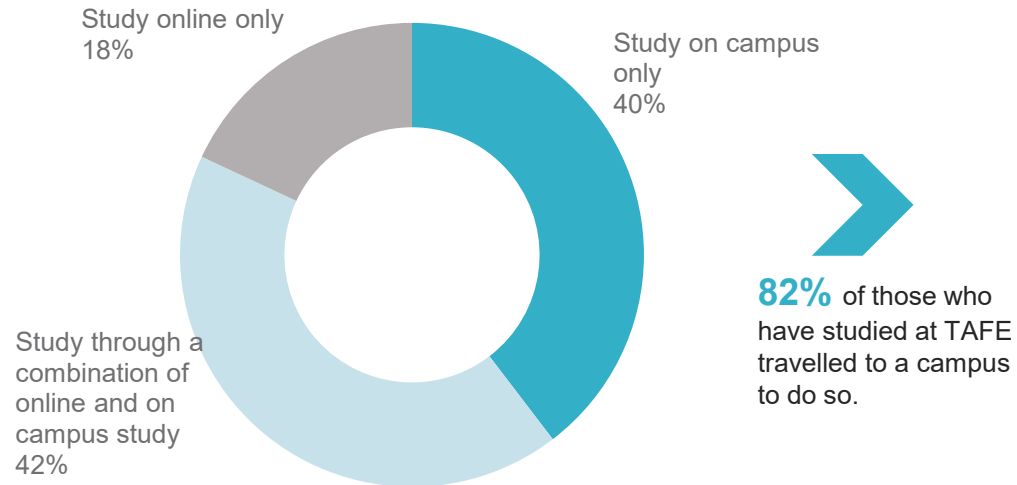
<b>Differences between men and women – significant differences only</b>			
	<b>Men</b>	<b>Women</b>	
Sample size	355	361	
Health	10%	24%	
Education	8%	19%	
Information technology	15%	8%	
Engineering and related technologies	14%	1%	
Architecture and building	9%	2%	



# The majority had studied at a campus, with car and public transport the dominant method for travelling there

## Method of studying

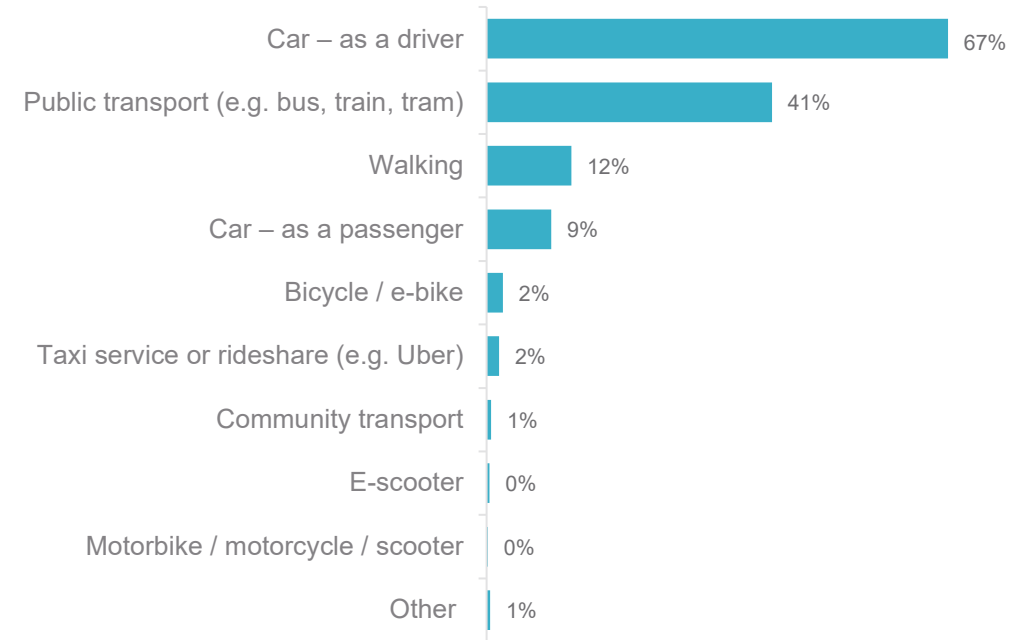
Base: Those who are currently enrolled in TAFE/have studied at TAFE in the past 5 years (n=718)



Q15. Thinking of all the study you have done at TAFE over the last 5 years, did you...?

## Method of travelling to TAFE campus

Base: Those who are currently enrolled in TAFE/have studied at TAFE in the past 5 years and travelled to a campus (n=586)

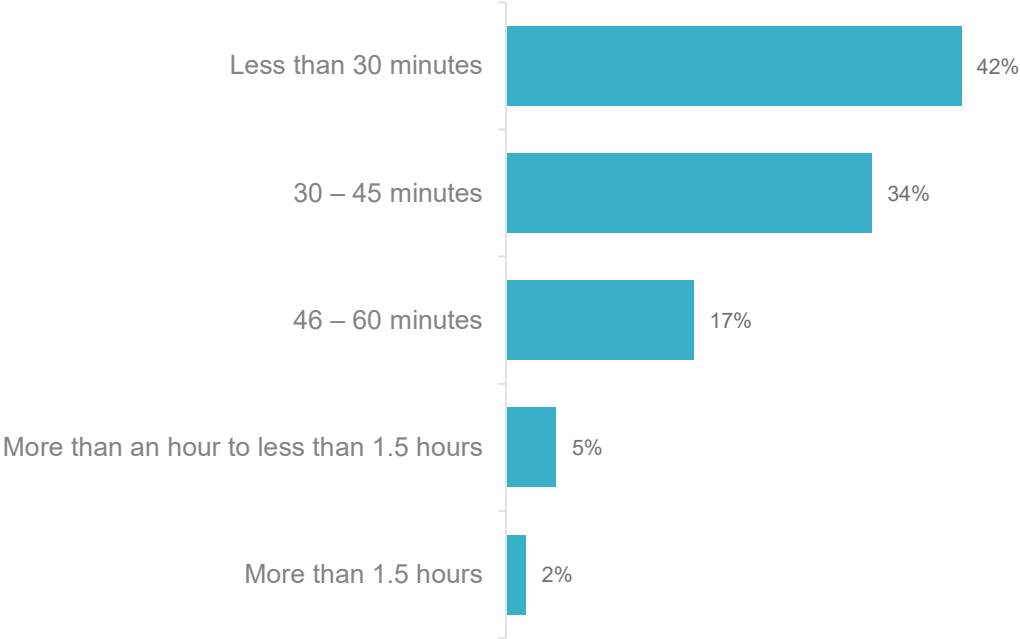


Q16. How do you usually get to and from TAFE?

# Two in five (42%) of those who currently/recently attended TAFE travelled for up to 30 minutes to a campus

## Typical journey time

Base: Those who are currently enrolled in TAFE/have studied at TAFE in the past 5 years and travelled to a campus (n=586)



Q17. How long was/is your typical journey to TAFE?

## Typical journey time, by mode of transport

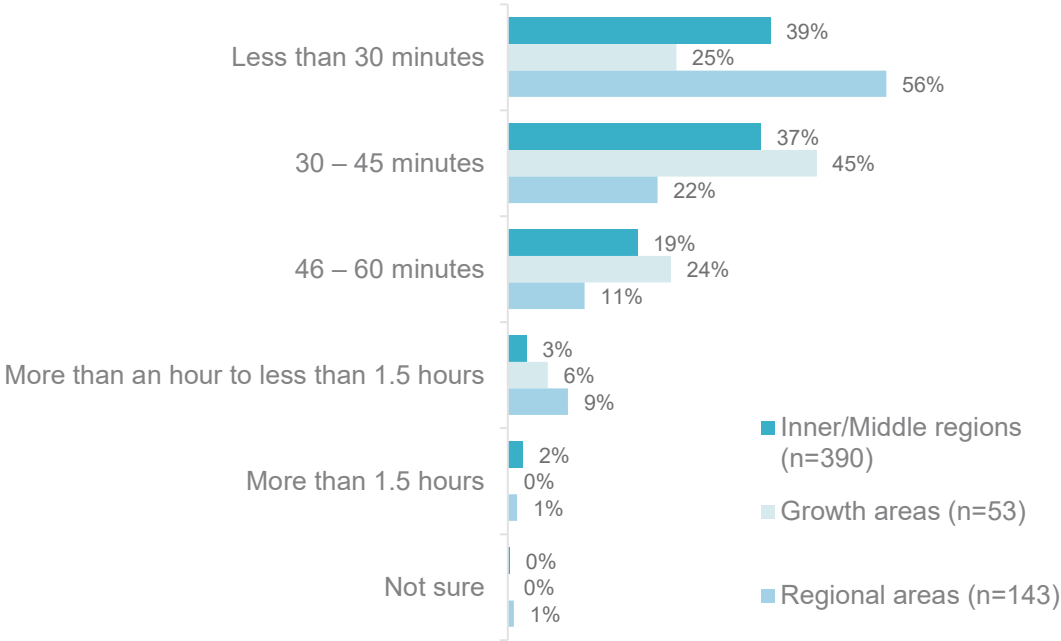
Base: Those who are currently enrolled in TAFE/have studied at TAFE in the past 5 years and travelled to a campus

	Average - all modes	Car – driver	Public transport	Walking	Car – passenger
Sample size	586	383	254	78	56
Less than 30 minutes	42%	48%	23%	39%	39%
30 – 45 minutes	34%	34%	41%	36%	37%
46 – 60 minutes	17%	12%	28%	24%	18%
More than an hour to less than 1.5 hours	5%	4%	5%	0%	2%
More than 1.5 hours	2%	1%	3%	2%	2%
Not sure	0%	1%	0%	0%	2%

# Those living in regional areas were more likely to have a journey time of less than 30 minutes

## Typical journey time, by region

Base: Those who are currently enrolled in TAFE/have studied at TAFE in the past 5 years and travelled to a campus



Q17. How long was/is your typical journey to TAFE?

# Among those who have attended TAFE, difficulty fitting it around other commitments was the biggest barrier

Women were significantly more likely to find it difficult to fit TAFE around other commitments (26%, vs. 19% of men), but there were no other significant differences by gender.

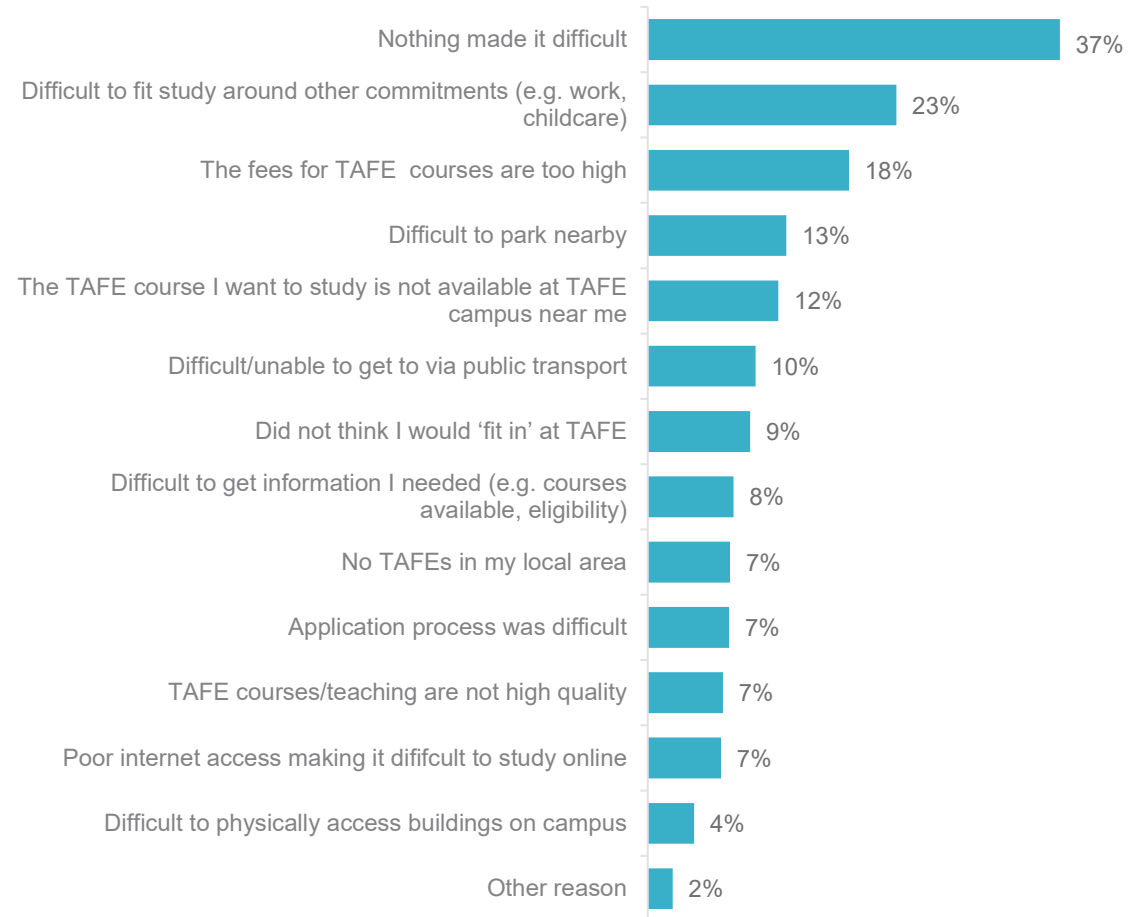
Those aged 35-44 also cited difficulty fitting TAFE around other commitments (30%), while those aged 25-34 were significantly more likely than average to say fees were too high (24%).

Those with a household income of less than \$104k were significantly more likely than average to say fees were too high (24%).

Q.18. Did any of the following make it hard for you [your 15-17 year old] to enroll in or attend a Victorian TAFE in the past 5 years?

## Barriers to enrolling in or attending TAFE

Base: Those who have attended TAFE in the last 5 years (n=717)



# Those living in the Middle and Outer west region were more likely to have experienced difficulties enrolling or accessing TAFE

## Barriers to enrolling in or attending TAFE, by location

Base: Those who have attended TAFE in the last 5 years

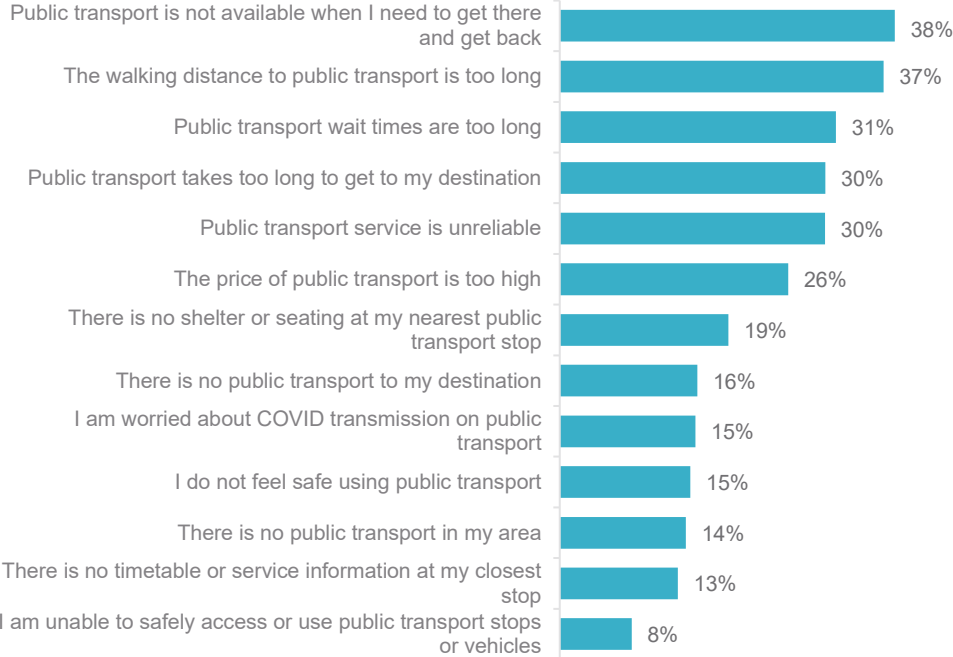
	Average - all regions	Inner Melbourne	Middle and Outer east	Middle and Outer south east	Middle and Outer west	Middle and Outer north	Growth areas	Regional city regions	Rest of Victoria
Sample size	717	118	106	91	65	107	63	77	90
Nothing made it difficult	37%	33%	43%	37%	26%	34%	35%	36%	47%
<b>NET Something made it difficult</b>	<b>63%</b>	<b>67%</b>	<b>57%</b>	<b>63%</b>	<b>74%</b>	<b>66%</b>	<b>65%</b>	<b>64%</b>	<b>53%</b>
Difficult to fit study around other commitments (e.g. work, childcare)	23%	21%	24%	19%	32%	20%	17%	27%	23%
The fees for TAFE courses are too high	18%	18%	16%	22%	19%	17%	15%	17%	22%
Difficult to park nearby	13%	14%	15%	14%	17%	9%	7%	19%	5%
The TAFE course I want to study is not available at TAFE campus near me	12%	7%	10%	12%	22%	9%	18%	9%	13%
Difficult/unable to get to via public transport	10%	9%	11%	12%	12%	5%	7%	5%	14%
Did not think I would 'fit in' at TAFE	9%	8%	10%	10%	8%	11%	12%	9%	6%
Difficult to get information I needed (e.g. courses available, eligibility)	8%	7%	8%	7%	6%	10%	12%	4%	9%
No TAFEs in my local area	7%	8%	7%	3%	8%	13%	9%	5%	8%
Application process was difficult	7%	5%	9%	5%	9%	11%	12%	4%	4%
TAFE courses/teaching are not high quality	7%	10%	5%	8%	9%	8%	8%	5%	3%
Poor internet access making it difficult to study online	7%	8%	8%	7%	8%	4%	14%	4%	5%
Difficult to physically access buildings on campus	4%	4%	5%	4%	6%	7%	5%	1%	2%
Other reason	2%	3%	2%	2%	2%	2%	3%	3%	3%

Q.18. Did any of the following make it hard for you [your 15-17 year old] to enroll in or attend a Victorian TAFE in the past 5 years?

# Availability of public transport and distance to public transport were the top public transport barriers

## Public transport barriers to TAFE access

Base: Those who have attended TAFE in the last 5 years and cited public transport as a difficulty (n=67)



One in ten (10%) of those who have attended TAFE in the last 5 years said that access via public transport made it difficult for them to attend TAFE. There were no demographic groups more likely to say public transport was a barrier, except those who have a postgraduate degree (21% said public transport made it difficult for them) and those whose household income was between \$104k - \$156k (17% said public transport made it difficult for them).

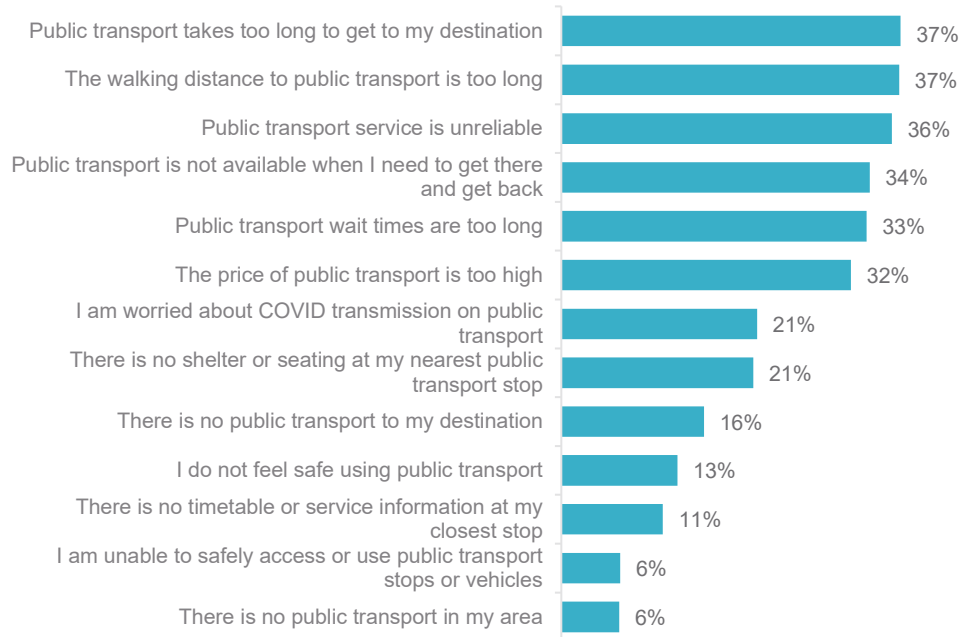
Due to the number of respondents who have attended TAFE in the last 5 years and found public transport to be a barrier being small (n=67 respondents), further analysis cannot be conducted.

Q.19. What did you [your 15-17 year old] find difficult when using, or trying to use, public transport when accessing TAFE?

# Though based on small sample sizes, Regional Victorians found there was not public transport available to access TAFE

## Public transport barriers to TAFE access – Metro

Base: Metropolitan Victorians who have personally attended TAFE in the last 5 years and cited public transport as a difficulty (n=47\*)

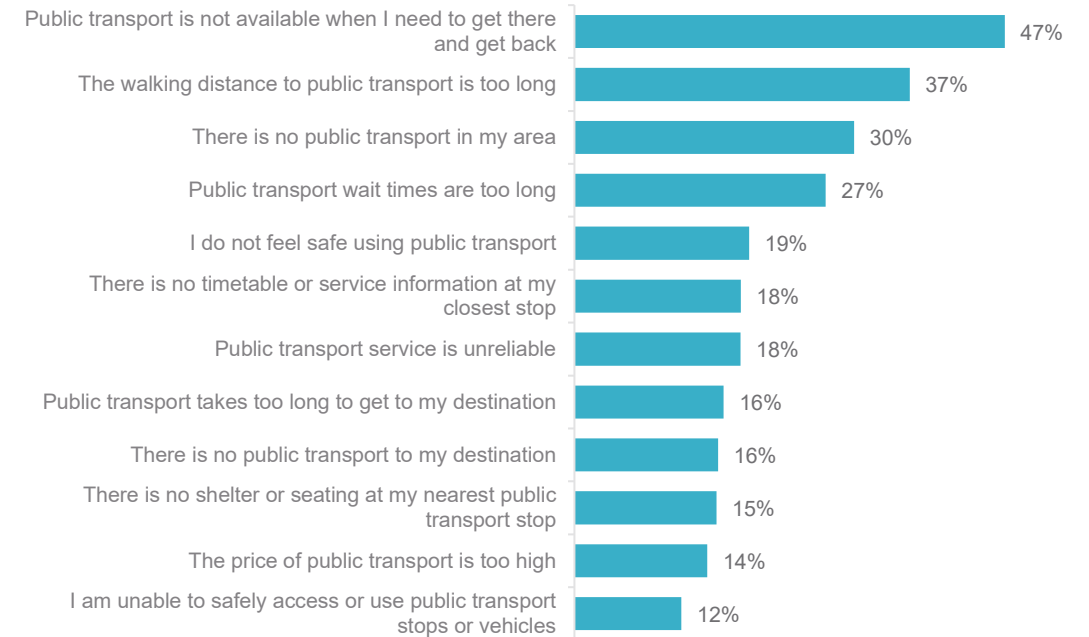


Q.19. What did you/your 15-17 year old find difficult when using, or trying to use, public transport when accessing TAFE?

\*small sample size, indicative results only

## Public transport barriers to TAFE access – Regional

Base: Regional Victorians (incl. growth areas) who have personally attended TAFE in the last 5 years and cited public transport as a difficulty (n=20\*)



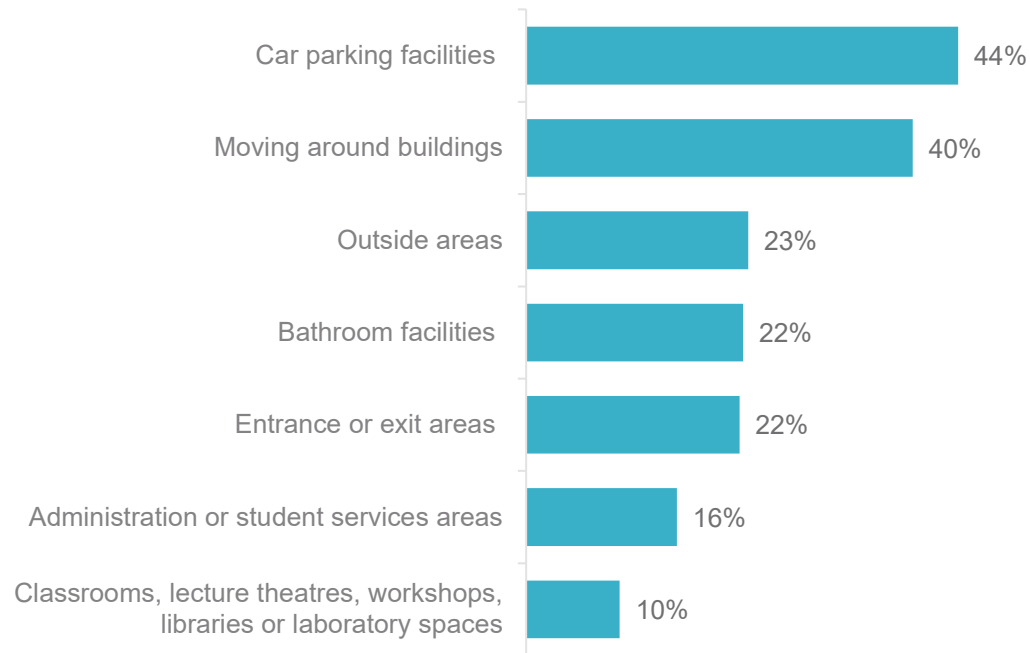
Q.19. What did you/your 15-17 year old find difficult when using, or trying to use, public transport when accessing TAFE?

\*small sample size, indicative results only

# Car parking facilities and moving around buildings were the main physical access barriers for those who have attended TAFE

## Physical barriers to TAFE access

Base: Those who have attended TAFE in the last 5 years and cited access as a difficulty (n=34\*)



Just under one in twenty (4%) of those who have attended TAFE in the last 5 years said that physical access made it difficult for them to attend TAFE. There were no demographic groups more likely to say physical access was a barrier.

Due to the number of respondents who have attended TAFE in the last 5 years and found physical access to be a barrier being small (n=34 respondents), further analysis cannot be conducted.

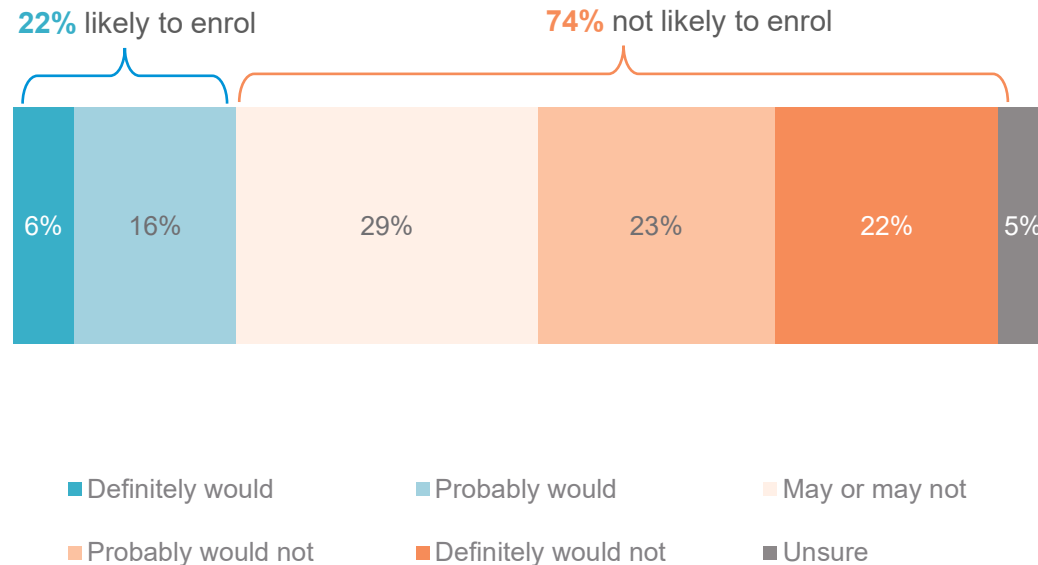
Q.20. What made it difficult to physically access buildings on campus?  
\*small sample size, indicative results only



# One in five (22%) Victorian adults (aged 18+) were likely to enrol in TAFE within the next 5 years

## Likelihood to enrol in TAFE in next 5 years

Base: All respondents (n=4,010)



Q.21. How likely are you to enroll in a TAFE course at a TAFE college in the next 5 years?

Likelihood to enrol in TAFE in next 5 years was significantly higher among:

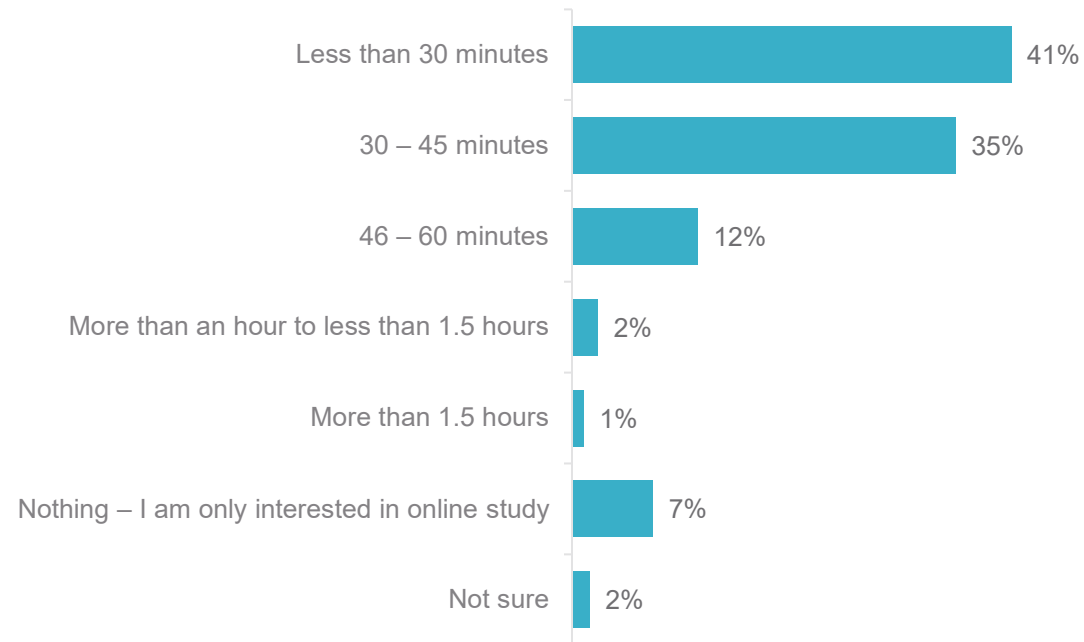
- Younger to middle-aged Victorians (25-34s – 28%; 35-44s – 28%; 45-54s – 24%)
- Those with children at home (24%), and those living with family (group of related people) where none of them is the parent / guardian of any other person in the household (30%)
- Those living in Growth areas (26%)
- Those born outside Australia (26%)
- Those who speak a language other than English (31%)
- Those who identify as Aboriginal and/or Torres Strait Islander\* (48%)
- Those whose highest level of education is a Certificate I or II (37%) or a Bachelor degree (24%)
- Those whose household income is \$52k-\$104k (25%) or \$156k-208k (28%)

	% Likely to enrol
Cohort 4: Those enrolled at TAFE in the last 5 years	49%
Cohort 5: TAFE target cohort - no prior Cert III aged under 65, or 15-17 not in full time school or employment	25%

# Two in five (41%) of those likely to attend TAFE would only travel up to 30 minutes to campus

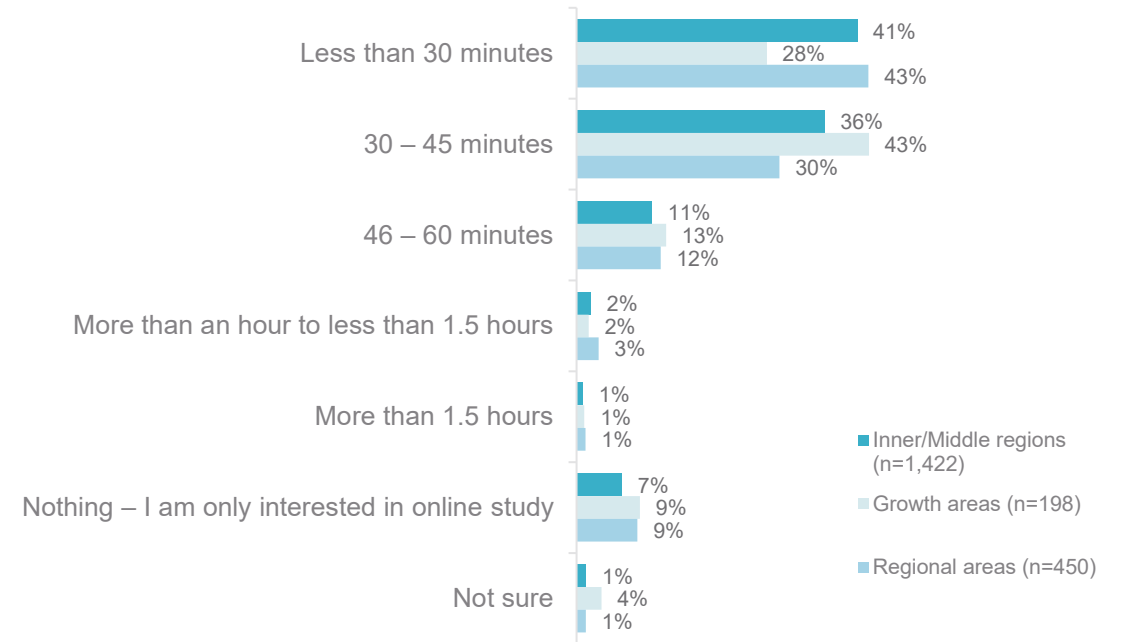
## Maximum travel time

Base: Those likely to attend TAFE in the next 5 years (n=2,070)



## Maximum travel time, by region

Base: Those likely to attend TAFE in the next 5 years



Q.22. What's the maximum travel time you'd be prepared to spend to get to a TAFE campus?

# Among those unlikely to enrol in TAFE, but who don't reject future study, difficulty in fitting study around other commitments was the biggest barrier

Among those unlikely to enrol in TAFE in the future, **50%** said this was because they were not interested in doing any further study. People who were not interested in doing any further study have been filtered out of the chart on the right.

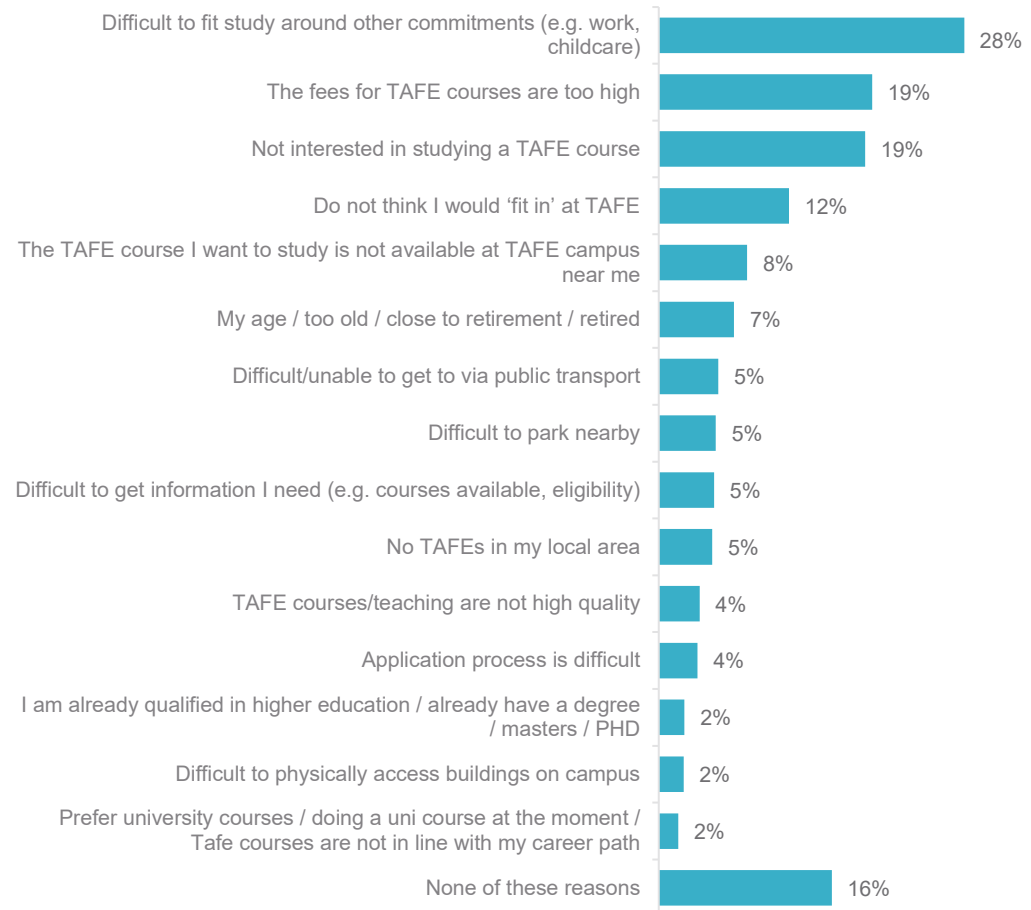
Those aged 25-54 were significantly more likely than average to say the difficulty fitting study around other commitments was a barrier to enrolling at a TAFE college (38%), as were those with a household income between \$104k - \$260k (37%).

Women were significantly more likely than men to mention fees for TAFE being a barrier (24%, vs. 15% of men).

Q.25. Why mightn't you enroll in a TAFE course at a TAFE college in the next five years?  
Responses less than 2% not shown.

## Barriers to enrolling in or attending TAFE in the future

Base: Those not likely to enrol in TAFE in the next 5 years, but who don't reject future study (n=1,481)



# Those living in the Middle and Outer west region were more likely to find that difficulty fitting study around other commitments was a barrier

## Barriers to enrolling in or attending TAFE in the future, by location

Base: Those not likely to enrol in TAFE in the next 5 years, but who don't reject future study

	Average - all regions	Inner Melbourne	Middle and Outer east	Middle and Outer south east	Middle and Outer west	Middle and Outer north	Growth areas	Regional city regions	Rest of Victoria
Sample size	1481	263	207	228	106	193	131	185	168
Difficult to fit study around other commitments (e.g. work, childcare)	28%	26%	24%	28%	37%	28%	34%	25%	28%
The fees for TAFE courses are too high	19%	20%	14%	22%	25%	20%	19%	17%	21%
Not interested in studying a TAFE course	19%	28%	20%	17%	15%	20%	14%	17%	16%
Do not think I would 'fit in' at TAFE	12%	10%	12%	16%	17%	13%	11%	10%	6%
The TAFE course I want to study is not available at TAFE campus near me	8%	9%	7%	7%	6%	7%	8%	7%	13%
My age / too old / close to retirement / retired	7%	6%	10%	6%	1%	6%	4%	11%	7%
Difficult/unable to get to via public transport	5%	5%	3%	6%	8%	7%	3%	4%	9%
Difficult to park nearby	5%	6%	6%	7%	8%	5%	5%	4%	3%
Difficult to get information I need (e.g. courses available, eligibility)	5%	5%	7%	5%	7%	9%	2%	3%	2%
No TAFEs in my local area	5%	3%	4%	3%	7%	7%	7%	2%	9%
TAFE courses/teaching are not high quality	4%	7%	4%	4%	4%	2%	1%	3%	3%
Application process is difficult	4%	6%	3%	3%	6%	4%	3%	2%	2%
I am already qualified in higher education / already have a degree / masters / PHD	2%	3%	5%	2%	1%	2%	4%	2%	1%
Difficult to physically access buildings on campus	2%	1%	0%	4%	4%	4%	1%	2%	3%
Prefer university courses / doing a uni course at the moment / Tafe courses are not in line with my career path	2%	3%	2%	1%	1%	2%	1%	1%	3%
None of these reasons	16%	14%	13%	17%	16%	11%	16%	20%	19%

Q.25. Why mightn't you enroll in a TAFE course at a TAFE college in the next five years?

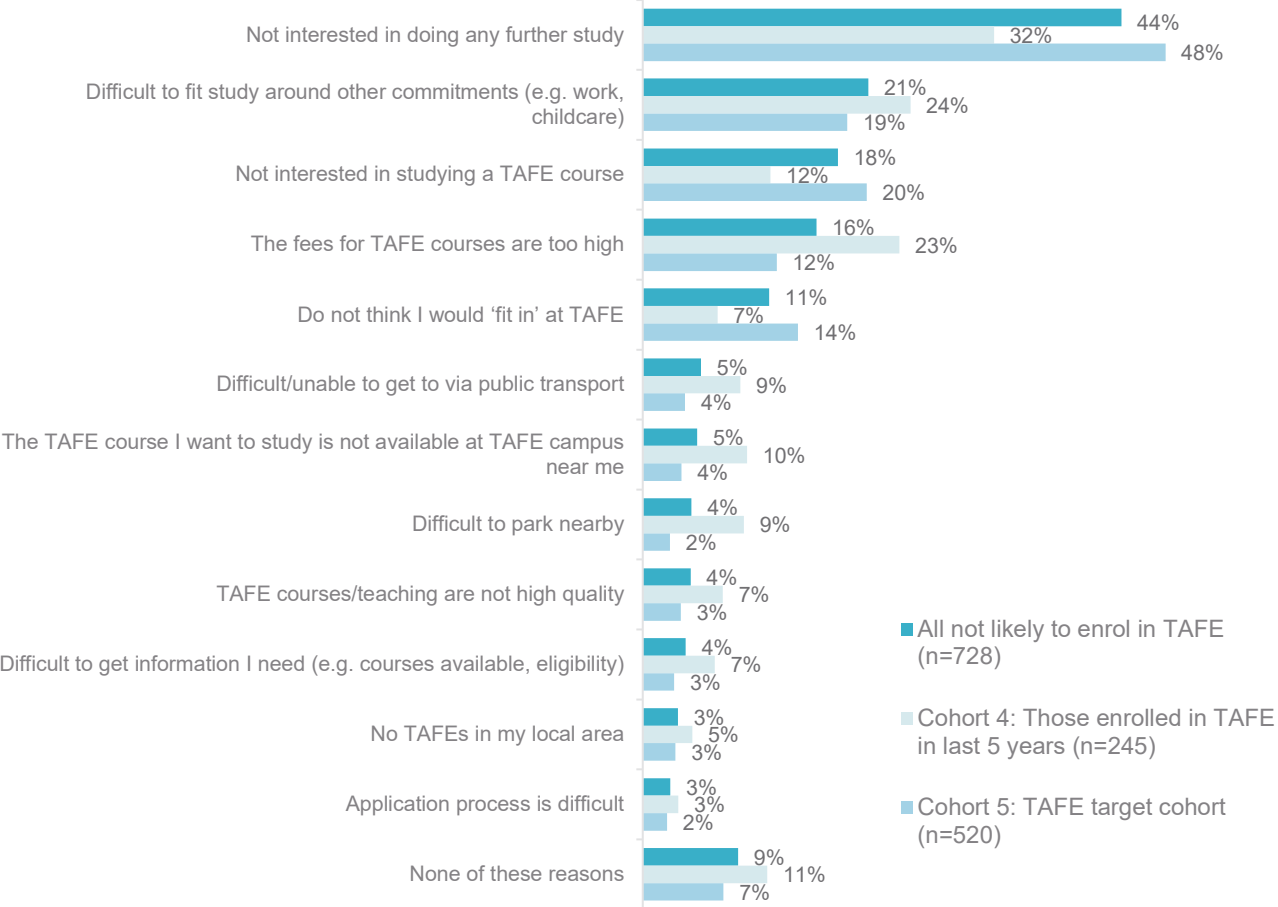
Responses less than 2% not shown.

Access to Social Infrastructure; April 2024

**Half (48%) of those in the target cohort for TAFE said they were unlikely to enrol in TAFE in the next five years due to being uninterested in doing any further study**

**Barriers to enrolling in or attending TAFE in the future, by cohorts**

Base: Those not likely to enrol in TAFE in the next 5 years



Q.25. Why mightn't you enroll in a TAFE course at a TAFE college in the next five years?  
Responses less than 3% not shown.

# One third (35%) of current TAFE students were not interested in further study

## Barriers to enrolling in or attending TAFE in the future – TAFE students

Base: Those who are currently/have been enrolled in TAFE AND not likely to enrol in TAFE in the next 5 years (n=389)

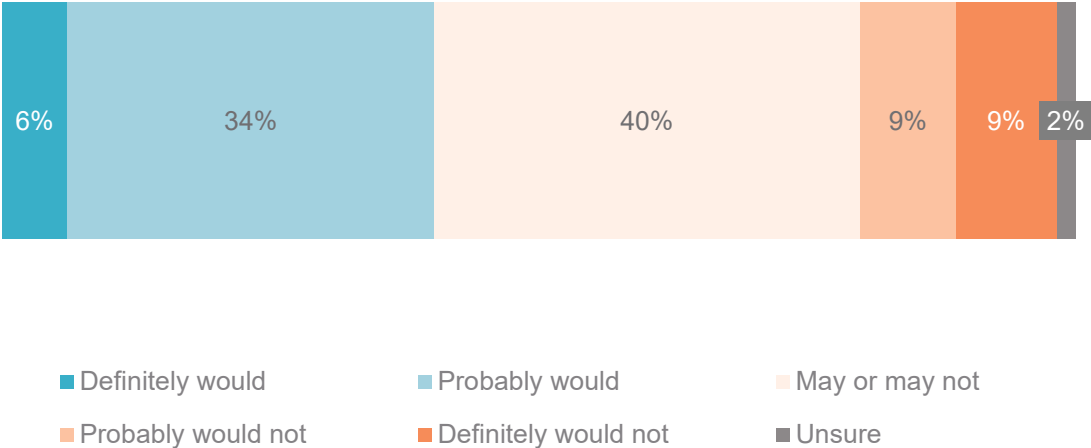


Q.25. Why mightn't you enroll in a TAFE course at a TAFE college in the next five years?  
Responses less than 3% not shown.

# Two in five (40%) said they definitely or probably would enrol in TAFE in the future if issues were addressed

## Likelihood to enrol in TAFE if barriers were addressed

Base: Those who are unlikely to enrol in TAFE, and whose barrier was not being uninterested in any further study (n=1,007)



Likelihood to enrol in TAFE in the future was highest among those who mentioned the following barriers to usage:

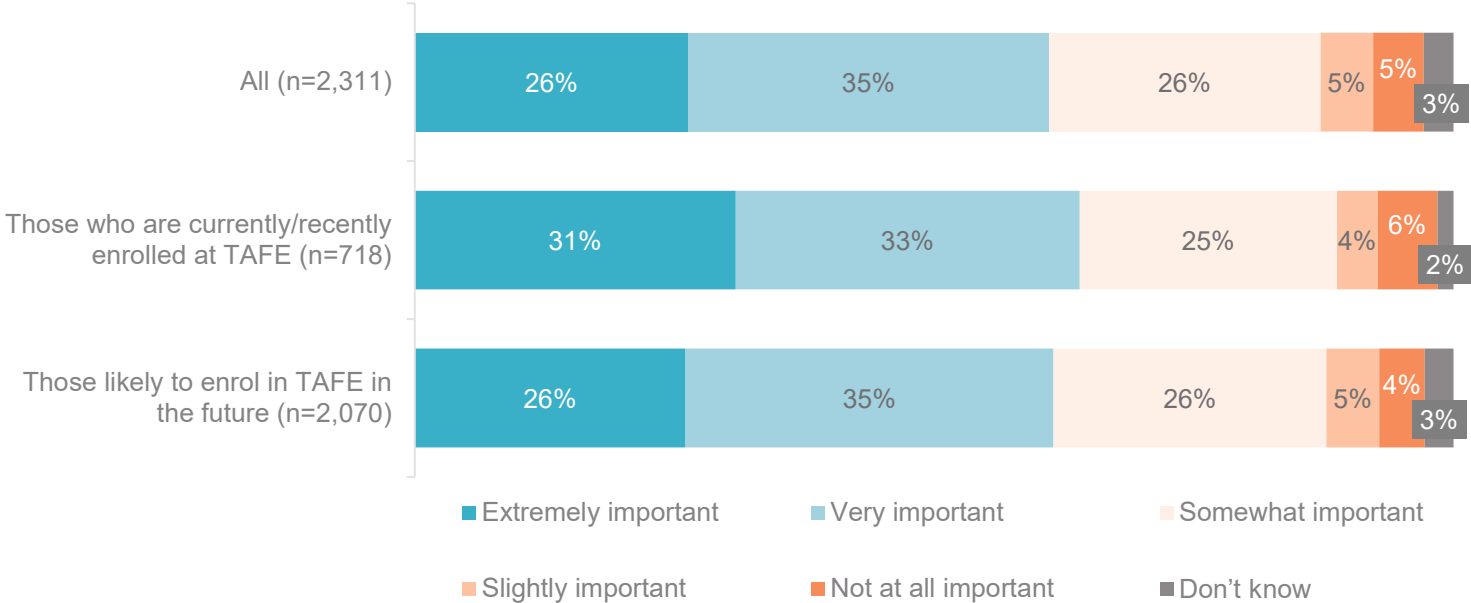
- TAFE courses not available at a campus near them (62% would enrol if this was addressed)
- Application process is difficult (57%)
- Fees are too high (54%)
- Difficult to fit study around other commitments (e.g. work, childcare) (50%)

Q.26. If the issues you mentioned in the previous question were addressed, how likely would you be to access TAFE?

# Those who were currently/recently enrolled in TAFE strongly felt it was important to study at a TAFE provider rather than elsewhere

## Importance of studying through TAFE rather than other education providers

Base: Those who are currently/have studied at TAFE in the last 5 years, or those likely to use in the future (n=2,311)



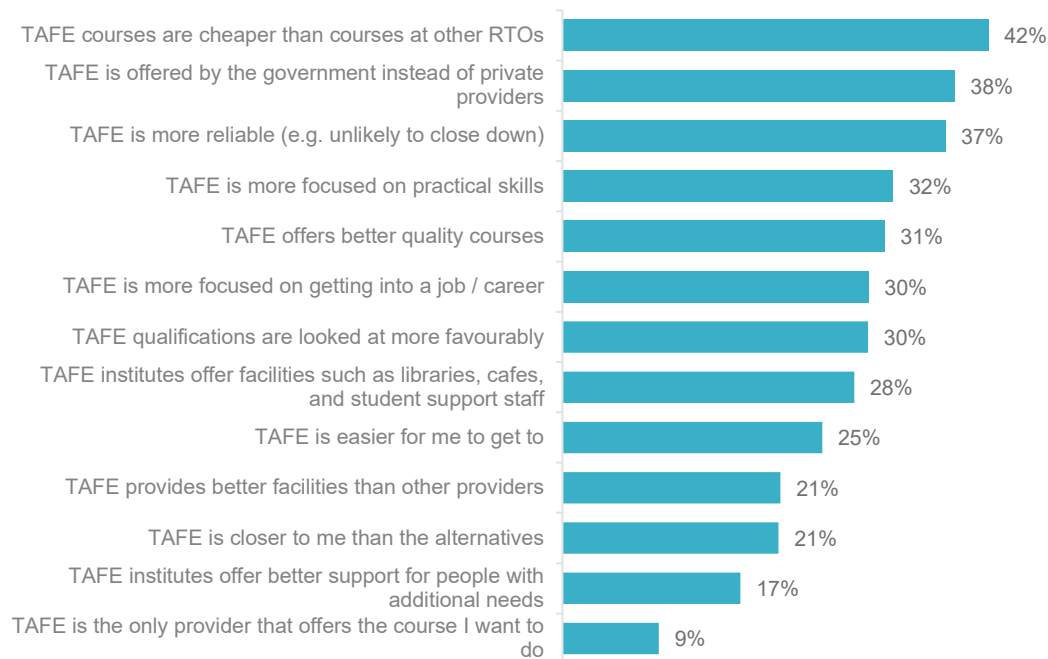
Q23. How important is it to you to be able to do a course through a TAFE provider instead of through somewhere else?



# Lower fees and being government backed drove preference for TAFE over other education providers

## Reasons for TAFE being preferred over other education providers

Base: Those who are currently/have studied at TAFE in the last 5 years, or those likely to use in the future and feel it's extremely, very or somewhat important to study at a TAFE (n=2,013)



Corresponding with the fact that women were significantly more likely to mention fees for TAFE being a barrier, women were also more likely to think studying at a TAFE college was important due to courses being cheaper (47%, vs. 36% of men).

Women were also significantly more likely than men to say it was important that TAFE courses were offered by government (40%, vs. 36% of men) and that TAFE is more reliable (39%, vs. 35% of men).

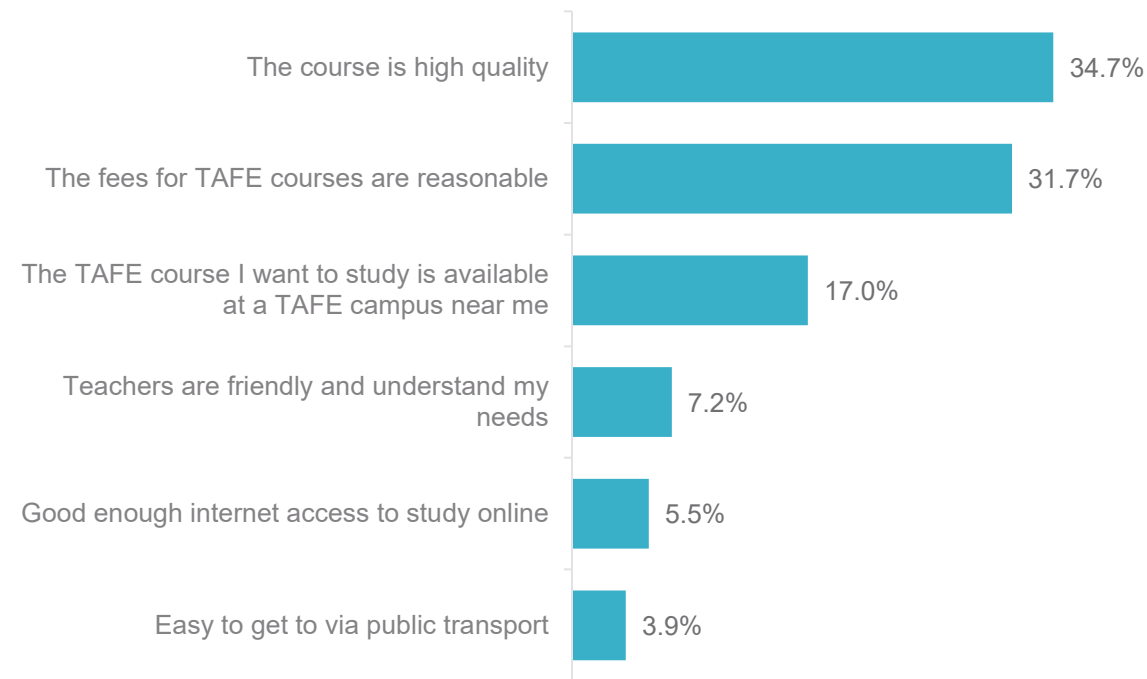
Differences between men and women – significant differences only			
		Men	Women
	Sample size	925	1,080
	TAFE courses are cheaper than courses at other RTOs	36%	47%
	TAFE is offered by the government instead of private providers	36%	40%
	TAFE is more reliable (e.g. unlikely to close down)	35%	39%
	TAFE provides better facilities than other providers	24%	19%

Q24. Why is it important to you to be able to do a course through TAFE?

# Course quality and reasonable fees were around twice as important as other factors when considering attending TAFE

## MaxDiff results for TAFE – relative importance of different features of TAFE

Base: Respondents who attended TAFE in the last 5 years OR who indicated they would be likely to consider TAFE in the next 5 years, n=1235



Q.27. For the next few questions, we would like you to think about the things that are MOST and LEAST important to you when considering going to TAFE.

**MaxDiff analysis determines how much more important one feature is to respondents compared to another.**

Results are presented as a percentage – when the percentages assigned to all features are summed together, they add to 100%.

The relative importance of one feature over another can be calculated by dividing one by the other – for example, the appeal of “the course is high quality” compared to “The TAFE course I want to study is available as a TAFE campus near me” can be determined by dividing 34.7% by 17.0% = 2.0, indicating that course quality is twice as important as being able to study at a local TAFE campus.

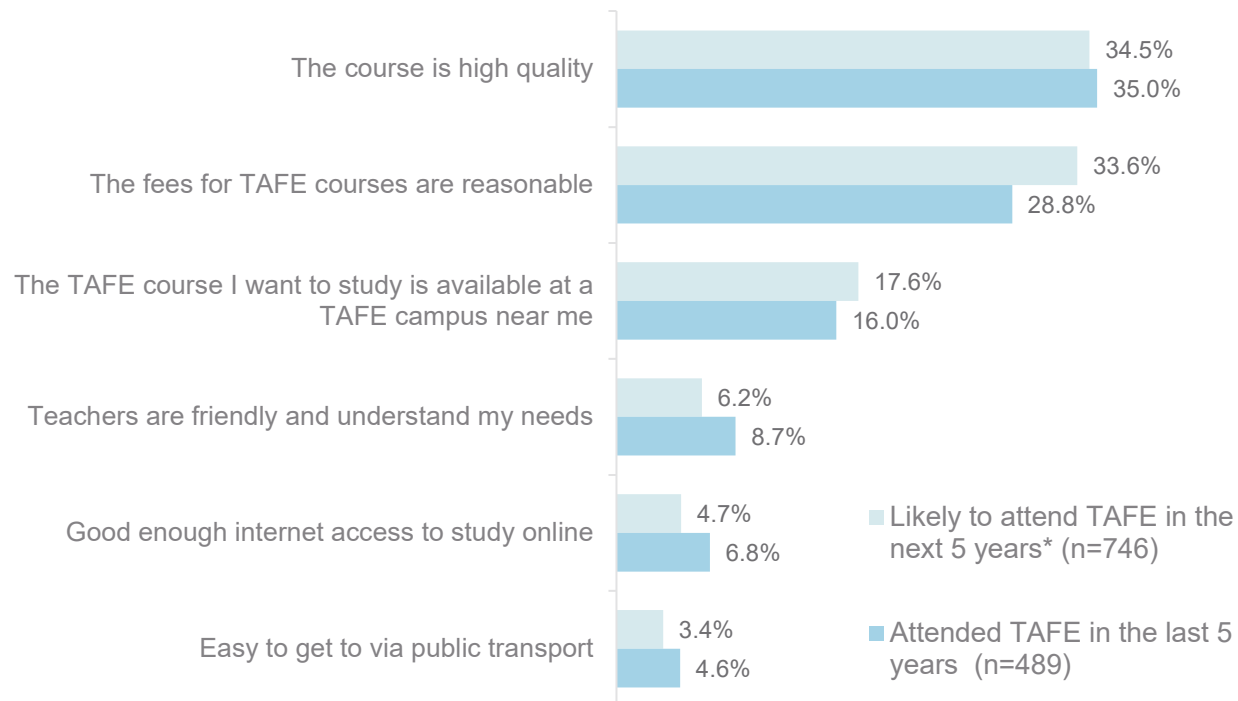
High course quality was the most important consideration when considering attending a TAFE course, followed closely by fees being set at a reasonable level. Around half as important was that the TAFE course was available at a TAFE campus locally.

Of less importance when considering a TAFE course were friendly and understanding teachers, adequate internet access to study online, and ease of getting to TAFE via public transport.

# The pattern of priorities were similar between those who had attended TAFE and those who were considering attending

## Comparison of those who have attended TAFE in the last 5 years vs. those likely to attend TAFE in the next 5 years

Base: Respondents who attended TAFE in the last 5 years OR who indicated they would be likely to consider TAFE in the next 5 years



The hierarchy of priorities when considering attending TAFE were similar between those who had attended TAFE in the last 5 years and those who had not done so but were considering attending in the next five years.

Nevertheless there were some differences in the strength of their priorities.

Those who had attended TAFE in the last 5 years tended to place more importance on teachers being friendly and understanding their needs, having good enough internet access to study online, and being easy to get to via public transport compared to those likely to attend in the next 5 years, but placed less importance on fees being reasonable and being able to study the course they want at a TAFE campus near them.

Q.27. For the next few questions, we would like you to think about the things that are MOST and LEAST important to you when considering going to TAFE.

\*Excludes those who have attended TAFE in the last 5 years

# Appendix 2: TAFE

Questionnaire



Infrastructure Victoria

Survey type: Online

Project consultants:	Anita Ganguly, Sharon Morris
Total number of interviews to be completed:	n=4000
Definition of target audience:	Representative sample of the adult Victorian population by region
Panel Provider (panel sample only):	Pure Profile
Fieldwork to close by:	25 <sup>th</sup> March 2024
Data to be merged with a previous datafile?	No
Questionnaire has been reviewed by Sharon	Yes
Does this job require a representative screener sample? (Typically required for segmentation and market sizing)	No
Any quotas on the sample? If yes, specify below	Yes – see p3

Any additional variables that should be tracked in the portal (aside from quota variables):

Weights to be applied:

	Male		Female		Total
	Under 45	45+	Under 45	45+	
Inner Melbourne	3.78%	2.42%	3.97%	2.67%	12.84%
Middle East	3.60%	4.16%	3.58%	4.78%	16.12%
Middle South East	3.94%	4.57%	3.93%	5.08%	17.52%
Middle West	2.06%	1.80%	2.01%	1.93%	7.80%
Middle North	2.94%	2.90%	2.91%	3.25%	12.00%
Growth Area Southeast	0.54%	0.31%	0.56%	0.34%	1.75%
Growth Area North	0.87%	0.55%	0.88%	0.59%	2.89%
Growth Area West	1.21%	0.64%	1.18%	0.67%	3.70%
Barwon, including Geelong and Ocean Grove	1.12%	1.38%	1.13%	1.56%	5.19%
Centre Highlands, including Ballarat and Bacchus Marsh	0.66%	0.89%	0.68%	0.97%	3.20%
Gippsland, including Warragul, Moe, Morwell, Traralgon and Bairnsdale	0.80%	1.44%	0.83%	1.54%	4.61%
Goulburn and Ovens Murray, including Shepparton, Benalla, Wangaratta and Wodonga	0.87%	1.39%	0.89%	1.49%	4.64%
Great South Coast, including Colac, Warrnambool and Portland	0.29%	0.50%	0.29%	0.55%	1.63%
Loddon Campaspe, including Bendigo, Castlemaine and Kyneton	0.72%	1.17%	0.75%	1.26%	3.90%
Wimmera Southern Mallee and Mallee, including Horsham and Mildura	0.43%	0.66%	0.42%	0.70%	2.21%

Target quotas:

	Male		Female		TOTAL
	Under 45	45+	Under 45	45+	
Inner Melbourne	211	110	226	153	700
Middle East	128	149	128	170	575
Middle South East	141	163	140	181	625
Middle West	76	70	77	77	300
Middle North	139	96	134	151	520
Growth Area Southeast	30	11	36	23	100
Growth Area North	39	16	39	26	120
Growth Area West	53	26	52	29	160
Barwon, including Geelong and Ocean Grove	56	54	59	81	250
Centre Highlands, including Ballarat and Bacchus Marsh	21	28	21	30	100
Gippsland, including Warragul, Moe, Morwell, Traralgon and Bairnsdale	24	43	25	46	138
Goulburn and Ovens Murray, including Shepparton, Benalla, Wangaratta and Wodonga	20	30	18	32	100
Great South Coast, including Colac, Warrnambool and Portland	18	31	18	33	100
Loddon Campaspe, including Bendigo, Castlemaine and Kyneton	20	33	21	35	109
Wimmera Southern Mallee and Mallee, including Horsham and Mildura	12	13	54	24	103
	988	873	1048	1091	4000

Introduction – Online

Thank you for taking part in this survey.

This survey is about access to different community services and amenities, and should take no more than 20 minutes to complete.

Please be reassured that this survey is anonymous, and we will never use your individual responses on their own. Quantum is an independent market research company and complies with the Australian Privacy Act 1988 and the Research Society's Code of Professional Behaviour. Our privacy policy can be found here.

Screener

The first few questions are to check if this survey is relevant to you.

ASK ALL

Q.1. Where do you live?

SINGLE RESPONSE

New South Wales.....	1	TERMINATE
Victoria .....	2	CONTINUE
Queensland.....	3	TERMINATE
Western Australia.....	4	TERMINATE
South Australia .....	5	TERMINATE
Northern Territory.....	6	TERMINATE
Tasmania.....	7	TERMINATE
Australian Capital Territory.....	8	TERMINATE
Outside Australia .....	9	TERMINATE

ASK ALL

Your responses to this survey will be used to help ensure Victorians have access to community services and amenities in the future. We'd like to know your street name to help with this planning. This information will be used to work out how far you live from different types of services and public transport, and will not be used beyond this research.

Q.2. What is the address of your home?

Street name and type (e.g. Collins Street. Please do not provide your street number.):

\_\_\_\_\_

Suburb: \_\_\_\_\_

Postcode: \_\_\_\_\_ CHECK POSTCODE IS IN VICTORIA, OTHERWISE TERMINATE

NOTE: AFTER PILOT WE REMOVED THE TERMINATION IF 'PREFER NOT TO PROVIDE MY STREET NAME' OPTION IS SELECTED.

ASK ALL

Q.3. What gender do you identify with?

SINGLE RESPONSE

- Male .....1
- Female .....2
- Non-binary .....3
- Another gender (please specify): .....4

ASK ALL

Q.4. How old are you?

SINGLE RESPONSE – CAPTURE AS NUMERIC AND THEN CODE AS BELOW; TERMINATE IF UNDER 18

- 18-24 .....1
- 25-34 .....2
- 35-44 .....3
- 45-54 .....4
- 55-64 .....5
- 65-74 .....6
- 75+ .....7

CHECK AGE / GENDER / REGION QUOTAS

ASK ALL

Q.5. Which of the following best describes your household?

SINGLE RESPONSE

- Single person household .....1
- Couple with no children at home .....2
- Family (including single parent) with children (including adult children) at home .....3
- Family (group of related people) where none of them is the parent / guardian of any other person in the household (e.g. living with siblings or grandparents) .....6
- Group household (e.g. a share house) .....4
- Other (please specify) .....5

Quantum Market Research

4

OFFICIAL: Sensitive

ASK IF Q.5 = CODE 3 OR CODE 6 (FAMILY)

Q.6. Please indicate the number of people in each of the following age groups in your household, INCLUDING YOURSELF.

NUMERIC ANSWER. PROGRAMMING: ALLOW NUMBERS BETWEEN 0 AND 9 ONLY; ALLOW EMPTY BOXES BUT ENSURE AT LEAST ONE OF THE 18-24 OR 25+ BOXES HAS A NUMBER ABOVE 0; ALLOW EMPTY BO

- SHOW IF Q.5 = CODE 3: 0 – 4 years old: \_\_\_\_
- SHOW IF Q.5 = CODE 3: 5 – 14 years old: \_\_\_\_
- SHOW IF Q.5 = CODE 3: 15 – 17 years old: \_\_\_\_
- 18 – 24 years old: \_\_\_\_
- 25 years or older: \_\_\_\_

ASK IF Q.5 = CODE 3 AND Q.6 >0 FOR 0-24 YEARS OLD

Q.6.a1 Are you a parent or guardian of any of these people in your household?

MULTIPLE RESPONSE

	Yes	No
SHOW IF Q.6 0-4 >0 0 – 4 years old	1	0
SHOW IF Q.6 5-14 >0 5 – 14 years old	1	0
SHOW IF Q.6 15-17 >0 15 – 17 years old	1	0
SHOW IF Q.6 18-24 >0 18 – 24 years old	1	0
No, I am not the parent or guardian of anyone in my household	1	0

ASK IF Q.5 = 3 (FAMILY WITH CHILDREN) AND Q.6.A1 = CODE 1 FOR I AM NOT THE PARENT/GUARDIAN OF ANYONE IN MY HOUSEHOLD

Q.6.a2 Is ANYONE in your household a parent or guardian of any of these people in your household?

MULTIPLE RESPONSE

	Yes	No
SHOW IF Q.6 0-4 >0 0 – 4 years old	1	0
SHOW IF Q.6 5-14 >0 5 – 14 years old	1	0
SHOW IF Q.6 15-17 >0 15 – 17 years old	1	0
SHOW IF Q.6 18-24 >0 18 – 24 years old	1	0
No, no-one in my household is the parent / guardian of someone aged under 25 years	1	0

Quantum Market Research

5

OFFICIAL: Sensitive

ASK IF Q.6.A1 = 1 FOR 15-17 YEARS OR Q.6.A2 = 1 FOR 15-17 YEARS (PARENT/GUARDIAN OF 15-17 YEAR OLD)

Q.6.a IF Q.6.A1 = 1 FOR 15-17 YEARS: [IF Q.6 =1 FOR 15-17 YEARS: IS YOUR CHILD; IF Q.6 >1 FOR 15-17 YEARS: ARE ANY OF YOUR CHILDREN] AGED 15-17 YEARS A FULL-TIME STUDENT?

IF Q.6.A2 = 1 FOR 15-17 YEARS: [IF Q.6 =1 FOR 15-17 YEARS: IS THIS CHILD; IF Q.6 >1 FOR 15-17 YEARS: ARE ANY OF THE CHILDREN] AGED 15-17 YEARS A FULL-TIME STUDENT?

IF Q.6 =1 FOR 15-17 YEARS: SINGLE RESPONSE  
IF Q.6 >1 FOR 15-17 YEARS: MULTIPLE RESPONSE

- Yes – full time secondary school student (at a secondary school or homeschooling) .....1
- Yes – full time secondary school student / VET at TAFE .....2
- Yes – full time TAFE student .....3
- Yes – TAFE or VET at Federation University, Victoria University, Swinburne University or RMIT .....4
- Yes – full time apprenticeship .....5
- Yes – full time at a university .....6
- Yes – full time at a private provider .....7
- Yes – other (please specify): .....8
- No .....9

ASK IF Q.6.A=99 (CHILD/REN AGED 15-17 ARE NOT STUDYING)

Q.6.b IF Q.6.A1 = 1 FOR 15-17 YEARS: [IF Q.6 =1 FOR 15-17 YEARS: IS YOUR CHILD; IF Q.6 >1 FOR 15-17 YEARS: ARE ANY OF YOUR CHILDREN] AGED 15-17 YEARS IN EMPLOYMENT?

IF Q.6.A2 = 1 FOR 15-17 YEARS: [IF Q.6 =1 FOR 15-17 YEARS: IS THIS CHILD; IF Q.6 >1 FOR 15-17 YEARS: ARE ANY OF THE CHILDREN] AGED 15-17 YEARS IN EMPLOYMENT?

IF Q.6 =1 FOR 15-17 YEARS: SINGLE RESPONSE  
IF Q.6 >1 FOR 15-17 YEARS: MULTIPLE RESPONSE

- Yes – full-time employment .....1
- Yes – part time employment .....2
- Yes – casual employment .....3
- No – not in employment .....4

Quantum Market Research

6

OFFICIAL: Sensitive

ASK IF Q6.A1 = 1 FOR 18-24 YEARS OR Q6A2 = 1 FOR 18-24 YEARS (PARENT/GUARDIAN OF 18-24 YEARS OLD)

Q.6.c [If Q.6 = 1 FOR 18-24 YEARS: Is your child; If Q.6 > 1 FOR 18-24 YEARS: Are any of your children] aged 18-24 years a full-time student?

If Q6.A2 = 1 FOR 18-24 YEARS: [If Q.6 = 1 FOR —18-24 YEARS: Is this child; If Q.6 > 1 FOR 15-17 YEARS: Are any of the children] aged 18-24 years a full-time student?

SINGLE RESPONSE

Yes ..... 1  
No ..... 2

If Q6.A1 = 1 OR Q6A2 = PARENT/GUARDIAN OF 0-15 YEARS OLD OR (Q.6.A = 1-4 OR 6, 7, 8), OR Q.6.C = 1, CLASSIFY AS DEPENDENT CHILDREN.

DP – RECODE Q.5 AS FOLLOWS:

CODE 1 = LONE PERSON HOUSEHOLD

CODE 2 = FAMILY HOUSEHOLD WITH NO DEPENDENT CHILDREN PRESENT

CODE 3: IF HAVE DEPENDENT CHILDREN (AS ABOVE) = FAMILY HOUSEHOLD WITH DEPENDENT CHILDREN PRESENT

CODE 3: IF HAVE NO DEPENDENT CHILDREN = FAMILY HOUSEHOLD WITH NO DEPENDENT CHILDREN PRESENT

CODE 4: GROUP HOUSEHOLD

CODE 5: OTHER

CODE 6 = FAMILY HOUSEHOLD WITH NO DEPENDENT CHILDREN PRESENT

ASK ALL

Q.7. Which of the following best describes your employment status?

SINGLE RESPONSE

Full time work ..... 1  
Part time/casual work ..... 2  
Not employed, looking for work ..... 3  
Not employed, not looking for work ..... 4  
Not able to work ..... 5  
Retired ..... 6  
Student ..... 7  
Other, please specify ..... 8

Quantum  
Market  
Research

OFFICIAL: Sensitive

ASK IF Q.7 = 7 (STUDENT)

Q.8. Where are you currently studying?

SINGLE RESPONSE

Secondary school student (at a secondary school or homeschooling,  
including VET subjects) ..... 1  
Secondary school student / VET at TAFE ..... 2  
TAFE ..... 3  
TAFE or VET at Federation University, Victoria University, Swinburne  
University or RMIT ..... 4  
Vocational education and training, but not at TAFE ..... 5  
University ..... 6  
Non-award study ..... 7  
Other (please specify) ..... 8

ASK ALL

Q.9. Do you hold any of the following concession cards?

MULTIPLE RESPONSE; RANDOMISE

Health Care Card ..... 1  
Pensioner Concession Card ..... 2  
Commonwealth Seniors Health Card ..... 3  
Department of Veterans Affairs Card ..... 4  
None of these ..... 5  
Don't know ..... 6

VALIDATION QUESTION

Data quality and accuracy is extremely important to us. So we have the most accurate understanding of your opinions and needs it is important that you provide thoughtful responses to each question in this survey.

Do you commit to providing thoughtful and honest answers to all the questions in this survey?

Please select only one

I can't promise either way  
 Yes, I will  
 No, I will not

TERMINATE IF CODE 2 NOT SELECTED.

Quantum  
Market  
Research

OFFICIAL: Sensitive

TAFE

The next set of questions are about education.

ASK IF NOT TAFE (CODE 2, 3 OR 4) AT Q.8 – FOR THOSE WHO ARE TAFE (CODE 2, 3 OR 4) AT Q.8, PLEASE AUTOCODE AS CODE 1 (YES)

Q.10. Before today, had you heard of TAFE (or Technical and Further Education institutes)?

TAFEs are public educational institutes that offer vocational education and training (VET) courses. While private (including not-for-profit) training providers also offer VET courses, we are only interested in TAFE for the purposes of this survey.

SINGLE RESPONSE

Yes ..... 1  
No ..... 2  
Not sure ..... 3

ASK ALL

Q.11. Are you aware of any TAFE institutes in your suburb/town or surrounding suburbs/towns?

SINGLE RESPONSE

Yes (please specify the name) ..... 1  
Yes (please specify the name) ..... 2  
Yes (please specify the name) ..... 3  
No ..... 4

ASK IF REGION HAS A TAFE

Q.12. Before today, were you aware of [IF ONLY ONE TAFE IN VICINITY, SHOW "this campus"; IF MORE THAN ONE TAFE IN REGION, SHOW "any of these campuses"] that provide TAFE?

SHOW NAME AND ADDRESS OF TAFES IN THEIR REGION. SINGLE RESPONSE

RESPONSE CODES IF ONLY ONE TAFE IN VICINITY:

Yes, I knew of this TAFE campus ..... 1  
Yes, I had heard of this but did not know it offered TAFE ..... 2  
No, I'm not familiar with this ..... 3  
Not sure ..... 4

RESPONSE CODES IF MORE THAN ONE TAFE IN VICINITY:

Yes, I knew of at least one of these TAFEs campuses ..... 1  
Yes, I had heard of at least one of these, but did not know any of them offered  
TAFE ..... 2

Quantum  
Market  
Research

OFFICIAL: Sensitive

No, I'm not familiar with any of these ..... 3  
 Not sure ..... 4

**PROGRAMMING – PLEASE COMBINE CODES FOR ANALYSIS**

ASK IF Q.8 IS NOT 2, 3 OR 4 (NOT ALREADY STUDYING TAFE); AUTOCODE AS CODE 1 IF Q.8 = 2, 3 OR 4

Q.14. Are you currently enrolled in TAFE?

**MULTIPLE RESPONSE**

Yes, at a TAFE in Victoria ..... 1  
 Yes, at a TAFE in another state ..... 2  
 No ..... 3

ASK ALL

Q.13. Have you personally studied any TAFE courses in the past five years (excluding single subjects undertaken while studying at a secondary school)?

**MULTIPLE RESPONSE. FOR ANALYSIS: AUTOCODE AS CODE 1 IF Q14=1 (CURRENTLY ENROLLED IN TAFE IN VICTORIA. AUTOCODE AS CODE 2 IF Q14=2 (CURRENTLY ENROLLED IN TAFE IN ANOTHER STATE)**

Yes, at a TAFE in Victoria ..... 1  
 Yes, at a TAFE in another state ..... 2  
 No ..... 3  
 Unsure ..... 4

ASK IF Q.13 = 1 OR Q.14 = 1 (STUDIED TAFE COURSES IN LAST 5 YEARS OR CURRENTLY ENROLLED IN TAFE IN VICTORIA)

Q.14.a At which Victorian TAFE(s) are you currently enrolled, or have studied at in the last 5 years?

**MULTIPLE RESPONSE**

Bendigo TAFE ..... 1  
 Box Hill Institute ..... 2  
 Chisholm Institute of TAFE ..... 3  
 Federation University ..... 4  
 TAFE Gippsland ..... 5  
 The Gordon TAFE ..... 6  
 GOTAFE - Goulburn Ovens Institute of TAFE ..... 7  
 Holmesglen Institute ..... 8  
 Kangan Institute ..... 9  
 Melbourne Polytechnic ..... 10  
 RMIT (Royal Melbourne Institute of Technology) ..... 11

South West TAFE ..... 12  
 Sunraysia Institute of TAFE (SunITAFE) ..... 13  
 Swinburne University of Technology ..... 14  
 Victoria University ..... 15  
 William Angliss Institute ..... 16  
 Wodonga TAFE ..... 17  
 Other (please specify) ..... 19  
 None of these ..... 18

ASK IF Q.14.A = CODES 1-17 OR CODE 19 OR Q.13 = 1 (STUDIED AT VICTORIAN TAFE IN LAST 5 YEARS)

Q.14.b In which of the following years were you studying at a Victorian TAFE?

**MULTIPLE RESPONSE**

2023 ..... 1  
 2022 ..... 2  
 2021 ..... 3  
 2020 ..... 4  
 2019 ..... 5  
 6 – 10 years ago (2014 to 2018) ..... 6  
 More than 10 years ago (2013 or earlier) ..... 7

ASK IF Q.14.A = CODES 1-17 OR CODE 19 (CURRENTLY ENROLLED AT OR STUDIED AT VICTORIAN TAFE IN LAST 5 YEARS)

Q.14.c And which subject(s) did the course(s) you were/are studying at a Victorian TAFE (in the last 5 years) fall into?

**MULTIPLE RESPONSE**

Maths and sciences ..... 1  
 Information technology ..... 2  
 Engineering and related technologies ..... 3  
 Architecture and building ..... 4  
 Agriculture, environmental and related studies ..... 5  
 Health ..... 6  
 Education ..... 7  
 Management and commerce ..... 8  
 Society and culture ..... 9  
 Creative arts ..... 10  
 Food, hospitality and personal services ..... 11  
 VET and VCE vocational major ..... 12  
 Other (please specify): ..... 13

ASK IF Q.14.A = CODES 1-17 OR CODE 19 (CURRENTLY ENROLLED AT OR STUDIED AT VICTORIAN TAFE IN LAST 5 YEARS)

Q.15. Thinking of all the study you have done at TAFE over the last 5 years, did you...?

**SINGLE RESPONSE**

Study online only ..... 1  
 Study through a combination of online and on campus study ..... 2  
 Study on campus only ..... 3

ASK IF Q.15 = CODES 2 OR 3 (STUDIED ON CAMPUS)

Q.16. How do you usually get to and from TAFE?

**MULTIPLE RESPONSE**

Car – as a driver ..... 1  
 Car – as a passenger ..... 2  
 Public transport (e.g. bus, train, tram) ..... 3  
 Walking ..... 4  
 Bicycle / e-bike ..... 5  
 Taxi service or rideshare (e.g. Uber) ..... 6  
 Community transport ..... 7  
 E-scooter ..... 8  
 Motorbike / motorcycle / scooter ..... 9  
 Other – please specify: ..... 10

ASK IF Q.15 = CODES 2 OR 3 (STUDIED ON CAMPUS)

Q.17. How long was/is your typical journey to TAFE?

**SINGLE RESPONSE**

Less than 30 minutes ..... 1  
 30 – 45 minutes ..... 2  
 46 – 60 minutes ..... 3  
 More than an hour to less than 1.5 hours ..... 4  
 More than 1.5 hours ..... 5  
 Not sure ..... 6



ASK IF Q.13=1 OR Q.14 = 1 OR Q.6.A=2-4 (SELF OR FAMILY STUDIED TAFE IN LAST 5 YEARS)

Q.18. Did any of the following make it hard for [if Q.13=1: you; if Q.13 IS NOT 1 AND Q.6A=2-4: your 15-17 year old] to enrol in or attend a Victorian TAFE in the past 5 years?

MULTIPLE RESPONSE, RANDOMISE

No TAFEs in my local area .....	1
The TAFE course I want to study is not available at TAFE campus near me .....	2
Difficult to park nearby .....	3
Difficult/unable to get to via public transport .....	4
The fees for TAFE courses are too high .....	5
Difficult to get information I needed (e.g. courses available, eligibility) .....	6
TAFE courses/teaching are not high quality .....	7
Difficult to physically access buildings on campus .....	8
Did not think I would 'fit in' at TAFE .....	9
Difficult to fit study around other commitments (e.g. work, childcare) .....	10
Application process was difficult .....	11
Poor internet access making it difficult to study online .....	12
Other reason, please specify .....	13
Nothing made it difficult .....	14
SHOW ONLY IF Q.13 IS NOT 1 AND Q.6 >0 FOR 15-17 YEARS OLD: Don't know .....	15

ASK Q.18=4 (PUBLIC TRANSPORT A BARRIER)

Q.19. What did [if Q.13=1: you; if Q.13 IS NOT 1 AND Q.6A=2-4: your 15-17 year old] find difficult when using, or trying to use, public transport to access TAFE?

MULTIPLE RESPONSE, RANDOMISE

There is no public transport in my area .....	1
There is no public transport to my destination .....	2
The walking distance to public transport is too long .....	3
The price of public transport is too high .....	4
Public transport wait times are too long .....	5
Public transport takes too long to get to my destination .....	6
There is no shelter or seating at my nearest public transport stop .....	7
Public transport is not available when I need to get there and get back .....	8
Public transport service is unreliable .....	9
I am unable to safely access or use public transport stops or vehicles .....	10
I am worried about COVID transmission on public transport .....	11
I do not feel safe using public transport .....	12
There is no timetable or service information at my closest stop .....	13
Other reason, please specify .....	14
None of these .....	15

ASK Q.18=8 (PHYSICAL ACCESSIBILITY A BARRIER)

Q.20. What made it difficult to physically access buildings on campus?

MULTIPLE RESPONSE, DO NOT RANDOMISE

Outside areas (e.g. ramps, handrails, lighting) .....	1
Car parking facilities (e.g. suitable pick up/drop off point, number of car spaces, number of disabled car spaces) .....	2
Entrance or exit areas (e.g. door width, intercom, lighting, obstructions) .....	3
Moving around buildings (e.g. stairs, internal doors, corridor width, clutter/obstructions in walkways) .....	4
Bathroom facilities (e.g. location, layout, size) .....	5
Inadequate lifts or escalators (e.g. not provided, not working, not large enough) .....	6
Administration or student services areas (e.g. desk height, seating, background noise) .....	7
Classrooms, lecture theatres, workshops, libraries or laboratory spaces (e.g. desk height, seating, background noise) .....	8
Other, please specify .....	9
None of these .....	10

ASK ALL

Q.21. How likely are you to enrol in a TAFE course at a TAFE college in the next 5 years?

SINGLE RESPONSE

Definitely would .....	1
Probably would .....	2
May or may not .....	3
Probably would not .....	4
Definitely would not .....	5
Unsure .....	6

ASK IF Q.13 = 1 OR Q.14 = 1 (STUDIED TAFE COURSES IN LAST 5 YEARS OR CURRENTLY ENROLLED IN TAFE IN VICTORIA) AND Q.21=1, 2, 3 (MIGHT CONSIDER ENROLLING IN NEXT 5 YEARS)

Q.21.a If you were to enrol in a TAFE course in the next 5 years, would this be the continuation of a course you'd studied before, or a new course?

SINGLE RESPONSE

Continuation of an existing course (e.g. moving from Certificate III to Certificate IV in the same subject) .....	1
A new course .....	2
Unsure .....	3

ASK IF Q.21 = 1-3 (LIKELY TO STUDY AT TAFE IN NEXT 5 YEARS)

Q.22. What is the maximum travel time you'd be prepared to spend on average to get to a TAFE campus?

SINGLE RESPONSE

Nothing – I am only interested in online study .....	1
Less than 30 minutes .....	2
30 – 45 minutes .....	3
46 – 60 minutes .....	4
More than an hour to less than 1.5 hours .....	5
More than 1.5 hours .....	6
Not sure .....	7

ASK IF Q.21 = 1-3 (LIKELY TO ENROL IN TAFE IN NEXT 5 YEARS) OR Q.8 = 2-3 (CURRENTLY STUDYING AT TAFE) OR Q.13 = 1 (TAFE IN LAST 5 YEARS) OR Q.14 = 1

Q.23. How important is it to you to be able to do a course through a government-owned TAFE provider instead of through a private registered training organisation (RTO)?

For your reference, the list of TAFE providers in Victoria is shown below

Bendigo TAFE  
 Box Hill Institute  
 Chisholm Institute of TAFE  
 Federation University  
 TAFE Gippsland  
 The Gordon TAFE  
 GOTAFE - Goulburn Ovens Institute of TAFE  
 Holmesglen Institute  
 Kangan Institute  
 Melbourne Polytechnic  
 RMIT (Royal Melbourne Institute of Technology)  
 South West TAFE  
 Sunraysia Institute of TAFE (SuniTAFE)  
 Swinburne University of Technology  
 Victoria University  
 William Angliss Institute  
 Wodonga TAFE

**SINGLE RESPONSE**

Extremely important..... 1  
 Very important..... 2  
 Somewhat important..... 3  
 Slightly important ..... 4  
 Not at all important ..... 5  
 Don't know..... 6

ASK IF Q.23 = CODES 1-3 (SOMEWHAT – EXTREMELY IMPORTANT)

Q.24. Why is it important to you to be able to do a course through TAFE rather than a registered training organisation (RTO)?

**MULTIPLE RESPONSE, RANDOMISE**

TAFE is the only provider that offers the course I want to do..... 1  
 TAFE provides better facilities than other providers..... 2  
 TAFE is offered by the government instead of private providers ..... 3  
 TAFE is more focused on practical skills..... 4  
 TAFE is more focused on getting into a job / career ..... 5  
 TAFE is easier for me to get to ..... 6  
 TAFE offers better quality courses ..... 7  
 TAFE qualifications are looked at more favourably..... 8  
 TAFE is more reliable (e.g. unlikely to close down) ..... 9  
 TAFE campuses offer better support for people with additional needs ..... 10  
 TAFE campuses offer facilities such as libraries, cafes, and student support staff ..... 11  
 TAFE is closer to me than the alternatives..... 12  
 TAFE courses are cheaper than courses at other RTOs..... 13  
 Other (please specify):..... 14

ASK IF Q.21 = 3, 4, 5 (NOT LIKELY TO USE TAFE IN NEXT 5 YEARS)

Q.25. Why mightn't you enrol in a TAFE course at a TAFE college in the next five years?

**MULTIPLE RESPONSE, RANDOMISE**

Not interested in doing any further study..... 16 **ANCHOR**  
 Not interested in studying a TAFE course ..... 1 **ANCHOR**  
 No TAFEs in my local area ..... 2  
 The TAFE course I want to study is not available at TAFE campus near me..... 3  
 Difficult to park nearby ..... 4  
 Difficult/unable to get to via public transport..... 5  
 The fees for TAFE courses are too high ..... 6  
 Difficult to get information I need (e.g. courses available, eligibility)..... 7  
 TAFE courses/teaching are not high quality..... 8  
 Difficult to physically access buildings on campus ..... 9  
 Do not think I would 'fit in' at TAFE..... 10  
 Difficult to fit study around other commitments (e.g. work, childcare) ..... 11  
 Application process is difficult..... 12  
 Poor internet access making it difficult to study online ..... 13  
 Other reason, please specify ..... 14  
 None of these reasons ..... 15

ASK Q.25 IS NOT CODE 1, CODE 14 OR CODE 99

Q.26. If the issues you mentioned in the previous question were addressed, how likely would you be to access TAFE?

**SINGLE RESPONSE**

Definitely would..... 1  
 Probably would..... 2  
 May or may not ..... 3  
 Probably would not ..... 4  
 Definitely would not..... 5  
 Unsure ..... 6

ASK IF Q.14.A = CODES 1-17 (AT OR DONE TAFE LAST 5 YEARS) OR Q.21 = CODES 1-2 (LIKELY TO CONSIDER TAFE IN NEXT 5 YEARS)

Q.27. For the next few questions, we would like you to think about the things that are MOST and LEAST important to you when considering going to TAFE.

For each task, you will see four different aspects that could be considerations when deciding whether or not to go to TAFE. For each task, please indicate which one aspect would be MOST important to you, and which one aspect would be LEAST important to you.

**MAXDIFF – 4 ITEMS PER TASK, 6 TASKS**

The TAFE course I want to study is available at a TAFE campus near me  
 The fees for TAFE courses are reasonable  
 The course is high quality  
 Teachers are friendly and understand my needs  
 Easy to get to via public transport  
 Good enough internet access to study online

Respondents were asked another section of questions here. Questions have been removed as they are not relevant to the TAFE section.

**Demographics**

And finally, just a couple more questions about you, so that we can understand how different people have answered these questions. As this is market research, it is carried out in compliance with the Privacy Act 1988 and the information you provided will be used only for research purposes.

**ASK ALL**

Q.57. What is the highest level of education you have completed?

**SINGLE RESPONSE**

Secondary education to Year 9 or lower.....	1
Certificate I or II .....	2
Secondary education to Year 10 or 11 .....	3
Secondary education to Year 12 .....	4
Certificate III or IV .....	5
Diploma or Advanced Diploma .....	6
Bachelor / undergraduate degree.....	7
Graduate diploma or graduate certificate .....	8
Postgraduate degree.....	9
Other – please specify: .....	10
Prefer not to answer .....	11

**ASK ALL**

Q.58. How long have you lived in your current area?

**SINGLE RESPONSE**

Less than 2 years.....	1
2 to 5 years.....	2
More than 5 years.....	3

**ASK ALL**

Q.59. Do you [SHOW IF Q,5=2-6 “, and/or anyone else in your household, “] hold a valid drivers license?

**SINGLE RESPONSE PER ROW**

	Yes	No
1. Yourself .....	1	2
2. [SHOW IF Q,5=2-6] Someone else in your household .....	1	2

**ASK IF Q.59 = CODES 1 FOR YOURSELF OR SOMEONE ELSE IN YOUR HOUSEHOLD**

Q.59.a Do you have access to a car?

**MULTIPLE RESPONSE**

Yes – there is at least one vehicle in my household.....	1
Yes – via a car sharing service (e.g. Go-Get, Uber Carshare, etc).....	2
No.....	3

**ASK ALL**

Q.60. In what country were you born?

**SINGLE RESPONSE**

Programming – enter drop-down list of countries

**ASK IF Q.60 = OUTSIDE AUSTRALIA**

Q.60.a In what year did you first arrive in Australia to live for one year or more?

**SINGLE NUMERICAL RESPONSE – 4 DIGITS**

**ASK ALL**

Q.61. Do you speak a language other than English at home?

**SINGLE RESPONSE**

No, English only.....	1
Yes.....	2

**ASK ALL**

Q.62. Do you identify as Aboriginal or Torres Strait Islander?

**SINGLE RESPONSE**

Yes.....	1
No.....	2
Prefer not to answer .....	3

**ASK ALL**

Q.63. What was your gross annual household income (before tax) from all sources last year?

**SINGLE RESPONSE**

Negative income.....	1
No income .....	2
\$1 - \$7,799 .....	3
\$7,800 - \$15,599 .....	4
\$15,600 - \$20,799 .....	5
\$20,800 - \$25,999 .....	6
\$26,000 - \$33,799 .....	7
\$33,800 - \$41,599 .....	8
\$41,600 - \$51,999 .....	9
\$52,000 - \$64,999 .....	10
\$65,000 - \$77,999 .....	11
\$78,000 - \$90,999 .....	12
\$91,000 – \$103,999 .....	13
\$104,000 - \$129,999 .....	14
\$130,000 - \$155,999 .....	15
\$156,000 - \$181,999 .....	16
\$182,000 - \$207,999 .....	17
\$208,000 - \$233,999 .....	18
\$234,000 - \$259,999 .....	19
\$260,000 - \$311,999 .....	20
\$312,000 - \$415,999 .....	21
\$416,000 or more .....	22
Not sure .....	23
Prefer not to answer.....	24

**ASK ALL**

Q.64. In general, would you say that your health is...?

**SINGLE RESPONSE**

Excellent .....	1
Very good.....	2
Good .....	3
Fair .....	4
Poor .....	5

ASK IF Q.5 = CODES 2, 3, 4, 5, 6 (LIVE WITH OTHERS)

Q.64a. Using the same scale, is there anyone else in your household (excluding yourself) you would describe as having fair or poor health?

SHOW SCALE HORIZONTALLY: EXCELLENT – VERY GOOD – GOOD – FAIR – POOR

SINGLE RESPONSE

Yes ..... 1  
No ..... 2  
Prefer not to answer ..... 3

ASK ALL

Q.65. Do you have any chronic disease or a long-term health condition? By long-term, we mean a problem which has lasted 6 months or more

SINGLE RESPONSE

Yes ..... 1  
No ..... 2  
I don't know ..... 3

ASK IF Q.65=1

Q.66. What long-term health conditions have you been told by a doctor or a nurse that you have?

MULTIPLE RESPONSE; RANDOMISE

Arthritis ..... 1  
Asthma ..... 2  
Cancer (including remission) ..... 3  
Dementia (including Alzheimer's) ..... 4  
Diabetes (excluding gestational diabetes) ..... 5  
Heart disease (including heart attack or angina) ..... 6  
Kidney disease ..... 7  
Lung condition (including COPD or emphysema) ..... 8  
Mental health conditions (including depression or anxiety) ..... 9  
Stroke ..... 10  
Any other long term health condition ..... 11  
Prefer not to answer ..... 12

ASK ALL

Q.67. Are you living with one or more disabilities? A disability is any limitation, restriction or impairment which restricts everyday activities and has lasted, or is likely to last, for six months or longer

MULTIPLE RESPONSE, RANDOMISE

I am not living with a disability ..... 1 EXCLUSIVE  
Sensory and/or speech disability (sight, hearing or speech) ..... 2  
Intellectual disability (difficulty learning or understanding) ..... 3  
Physical disability (including breathing difficulties, chronic or recurrent pain, incomplete use of limbs and more) ..... 4  
Psychosocial disability (including nervous or emotional conditions, mental illness, memory problems, and social or behavioural difficulties) ..... 5  
Head injury, stroke or acquired brain injury ..... 6  
Other disability (restrictions in everyday activities due to other long-term conditions or ailments; please specify): ..... 7  
Prefer not to answer ..... 8

ASK IF Q.67.A = YES FOR ANY CHILDREN AGED 0-17 (PARENT/GUARDIAN OF CHILDREN AT HOME)

Q.67.a Are any of your children living with a disability or long-term health condition (lasting six months or more)?

MULTIPLE RESPONSE, RANDOMISE

No disability or long term health condition ..... 1 EXCLUSIVE  
Yes, with a disability ..... 2  
Yes, with a long-term health condition ..... 3  
Prefer not to answer ..... 4

ASK IF Q.67.A = CODE 2 (CHILD HAS A DISABILITY) – SHOW ON SAME SCREEN AS Q.67.A IF OPTION SELECTED

Q.67.b Which disabilities are any of your children living with?

MULTIPLE RESPONSE, RANDOMISE

Sensory and/or speech disability (sight, hearing or speech) ..... 1  
Intellectual disability (difficulty learning or understanding) ..... 2  
Physical disability (including breathing difficulties, chronic or recurrent pain, incomplete use of limbs and more) ..... 3  
Psychosocial disability (including nervous or emotional conditions, mental illness, memory problems, and social or behavioural difficulties) ..... 4  
Head injury, stroke or acquired brain injury ..... 5  
Other disability (restrictions in everyday activities due to other long-term conditions or ailments; please specify): ..... 6  
Prefer not to answer ..... 7

ASK IF Q.67.A = CODE 3 (CHILD HAS HEALTH CONDITION) – SHOW ON SAME SCREEN AS Q.67.A IF OPTION SELECTED

Q.67.c Which long-term health conditions are any of your children living with?

MULTIPLE RESPONSE, RANDOMISE

Arthritis ..... 1  
Asthma ..... 2  
Cancer (including remission) ..... 3  
Dementia (including Alzheimer's) ..... 4  
Diabetes (excluding gestational diabetes) ..... 5  
Heart disease (including heart attack or angina) ..... 6  
Kidney disease ..... 7  
Lung condition (including COPD or emphysema) ..... 8  
Mental health conditions (including depression or anxiety) ..... 9  
Stroke ..... 10  
Any other long term health condition ..... 11  
Prefer not to answer ..... 12

---

ASK ALL

Q.68. Do you currently need someone to help with, or be with you for, body movement activities? For example: getting out of bed, moving around at home.

SINGLE RESPONSE

Yes, always ..... 1  
Yes, sometimes..... 2  
No ..... 3

---

ASK ALL

Q.69. Do you currently need someone to help with, or be with you for, self-care activities? For example, doing everyday activities such as eating, showering, dressing or toileting?

SINGLE RESPONSE

Yes, always ..... 1  
Yes, sometimes..... 2  
No ..... 3

---

ASK ALL

Q.70. Do you currently need someone to help with, or be with you for, communication activities? For example, making decisions, understanding or being understood by others?

SINGLE RESPONSE

Yes, always ..... 1  
Yes, sometimes..... 2  
No ..... 3

**Online thanks**

**End with thanks (all):**

Thank you for assisting us today. This survey was conducted on behalf of Infrastructure Victoria. Your response to this questionnaire will be kept strictly confidential and will be used only for research purposes. If you have any queries or concerns, please contact us on [surveys@qmr.com.au](mailto:surveys@qmr.com.au)

All data and information collected from the survey will be stored appropriately and in accordance with the Australian Privacy Act 1988 and the New Zealand Privacy Act 2020. Our Privacy policy can be found here.

Quantum  
Market  
Research

25

OFFICIAL: Sensitive



# Quantum Market Research

Level 3, 650 Chapel Street,  
South Yarra, VIC 3141, Australia

[research@qmr.com.au](mailto:research@qmr.com.au)