ITLS-Interfleet
Transport Opinion Survey (TOPS)
Bus Industry Confederation National Conference, 26 October 2010

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Institute of Transport and Logistics Studies
Outline

› What is TOPS?
› Why is it useful?
   - National priority issues
   - Highest priority issue in transport
   - Confidence about transport in local area and Australia
   - Government responsibility for transport
   - Private sector involvement in public transport
› Using TOPS

Source: Parramatta Advertiser, 13 Jan 2009
Source: SMH April 2009
What is TOPS?

› Aims of TOPS
  - Understand community views on transport
  - Track changes in community sentiment about transport over time

› About TOPS
  - Quarterly survey of 1,000 Australians over 18 years
  - Representative sample across Australia
  - Telephone survey by Taverner Research
  - 3 quarters of data:
    - March 2010
    - June 2010
    - September 2010
Which two of these issues do you think are the highest priority in Australia today?

- Top issues: health, then economy/employment and education
- 1 in 4 say either transport or infrastructure is one of top 2 issues
NSW and Vic more concerned about transport than Qld or WA

Transport and infrastructure as highest priority issues by state, Mar-Sept 2010

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% of respondents nominating transport or infrastructure as one of the two highest priority issues in Australia
What do you think is the highest priority issue for transport in Australia now? (unprompted)

- Public transport is the highest priority transport issue!

![Highest priority transport issue in Australia, Mar-Sept 2010](chart)

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Responses sum to 100%
Victorians most committed to public transport as highest priority
Highest priority issue in transport – comments

Highest priority is Public Transport – Sydney respondents

› “Lack of transport in public transport / there is not enough and the trains do not run on time / the conditions on the trains are too hot and stuffy / the attitude of drivers on public buses is terrible / and the bus services never run on time if at all and you find yourself running late for where you need to go and you end up having to catch a cab and it's more expensive”

› “Nth west of Sydney hardly any public transport, lack of infrastructure”

› “Public transport / more accessible to a wider range of people and suburbs and should be more affordable / I think it's limited to inner suburb area however if you are on the outskirts of Sydney it's almost impossible to get anywhere via public transport”

› “Trains are never on time and we don't have enough”

› “Public transport - more frequency of buses and trains in west Sydney”

› “Public transport in NSW is terrible especially the trains / the timetable does not run on time / you can be waiting for 20 mins for train, there is not enough trains to service the commuters / especially in peak hour / you end up using your car which defeats the purpose / the trains are always hot and uncomfortable / they spend all this time making the stations look good but don't improve the trains”
Highest priority issue in transport – comments

Highest priority is Public Transport – Qld regional city respondents

› “Buses, local buses, the connections are no good, they are too far between, we’re in Burleigh Waters”

› “I think in Qld there definitely needs to be more bus services, and more public transport options, we don’t have a local train system here, just buses, that’s it, we’re in Mackay”

› “Local transport – buses – need more of them”

› “Need public transport more of it, on Gold Coast only slowly extending railway, good if we could have all way down to Coolangatta airport. Need more buses to fill in those gaps”

› “Not very good public transport, bus service catering more for tourists than the residents of the Gold Coast, trams cater for tourists, need better connecting bus services for residents”

› “I grew up with kids getting buses, I think if kids used buses as children they would use them when they get older. I see kids getting dropped off around schools, and it causes great congestion on roads at 8 am and 3 pm. Bring back bus passes”
Confidence about transport – local area 1 year ago

Compared to 1 year ago, do you think the state of transport in general in your local area is better now, the same, or worse now?

› Only 1 in 5 say local transport is better than 1 year ago

Transport in local area compared to 1 year ago (Australia), Mar-Sept 2010

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Confidence about transport – by state

- Vic most negative
- WA – transport is the same

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Do you think that in 1 year’s time, the state of transport in your local area will be better than it is now, the same, or worse than now?

- Only 1 in 5 say local transport will be better in 1 year

![Bar chart showing confidence about transport in local area in 1 year](chart.png)
Local area in 1 year – by state

- WA – transport the same, but becoming more negative
- NSW most pessimistic, Qld polarised

### Transport in local area in 1 year by state, Mar-Sept 2010

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Reasons for confidence – better in 1 year

What were you thinking of most when you answered that question [transport in local area in 1 year’s time]? (unprompted)

› Better in 1 year – thinking of public transport
Reasons for confidence – worse in 1 year

What were you thinking of most when you answered that question [transport in local area in 1 year’s time]? (unprompted)

› Worse in 1 year – thinking of population, roads and public transport

![Graph showing transport in local area - reason for being worse in 1 year, Mar-Sept 2010](chart.png)
Better in 1 year’s time in local area because..

› Thinking of public transport

- “Because in the area in which I live I would hope that there would be closer public transport via bus and for it to be closer to where I live / I hope that it would be better in the next year”
- “They are going to duplicate the train line from Cronulla to Sutherland in peak hours”
- “They’re improving the timetables, more trains and also changing the zoned areas makes it easier to manage”
- “Because there are a lot initiatives being taken by the government to improve public transport, change of timetables and further development of the train stations by building a car park at Quakers Hill and there is also a plan to build a lift for handicapped commuters and commuters who travel with children and prams”

Govt initiatives are being recognised
Reasons for “worse” – Sydney

Worse in 1 year’s time in local area because..

› Thinking of population changes
  - “Worse because of the increased density we are having here in St Ives / and more people on the road”
  - “There is more people moving into the area and they are reducing buses, not increasing them in our area nth west of Sydney”
  - “The area we are in is getting more people and the roads are going to stay the same”

› Thinking of public transport
  - “Because there has been no changes for a long time in public transport / they talk about plans for public transport but nothing has been done for decades / so I don't see that changing”
Do you think that in 1 year’s time, the state of transport in Australia will be better than it is now, the same as now, or worse than it is now?

› 1 in 4 say Australia will be worse, 1 in 4 say Australia will be better
NSW becoming more positive, SA more negative and don’t know
Confidence about transport – Australia in 5 years

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

› More positive about long term than about 1 year

Transport in Australia in 5 years, Mar-Sept 2010

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NSW becoming more confident, SA most confident
TOPS index – change in confidence over time

Index = 100 in March 2010, based on ratio: better/(better+worse)

› Australians becoming more confident about transport improving in Australia in 1 yr
› Australians becoming less confident about transport improving in local area

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<thead>
<tr>
<th>ITLS-Interfleet TOPS Index of Transport Confidence</th>
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<td>Transport in Australia in 1 year</td>
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<td>Transport in Australia in 5 years</td>
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Do you think your State government or the Australian federal government is most responsible for transport?

- State govt is most responsible

Q1-2010: 27% (State), 14% (Fed), 22% (Don't know)
Q2-2010: 29% (State), 10% (Fed), 16% (Don't know)
Q3-2010: 57% (State), 10% (Fed), 22% (Don't know)
Q4-2010: 58% (State), 10% (Fed), 16% (Don't know)

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Govt responsibility for transport – by state

- NSW and Qld – election announcements of Epping-Parra Rail, Redcliffe Rail
Do you think the private sector should be involved more, the same as now, or involved less in the provision of public transport?

› More people want more involvement rather than less

Private sector role in public transport in Australia, Mar-Sept 2010

- Q1-2010: 29% private sector involved more, 44% private sector involved less, 22% don't know
- Q2-2010: 31% private sector involved more, 42% private sector involved less, 20% don't know
- Q3-2010: 29% private sector involved more, 44% private sector involved less, 19% don't know

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Private sector involvement – by state

- Victorians least supportive
- Qld keen
TOPS highlights

› Public transport is the highest priority issue for transport
› About half say transport in their local area is the same as a year ago
› Few people see local transport improving in 1 year’s time
› If transport improving, more likely to be thinking of public transport
› Australians more confident about transport being better in 5 years than in 1 year
› 58% say their state govt is most responsible for transport
› 44% support more private sector involvement in public transport
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   › Register for quarterly emails

2. Use TOPS for advocacy

3. Build on TOPS
   › Add questions, more analysis

Next TOPS release: 8 December 2010