

ITLS-Interfleet Transport Opinion Survey (TOPS)

Bus Industry Confederation National Conference, 26 October 2010

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- › 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

› Aims of TOPS

- Understand community views on transport
- Track changes in community sentiment about transport over time

› About TOPS

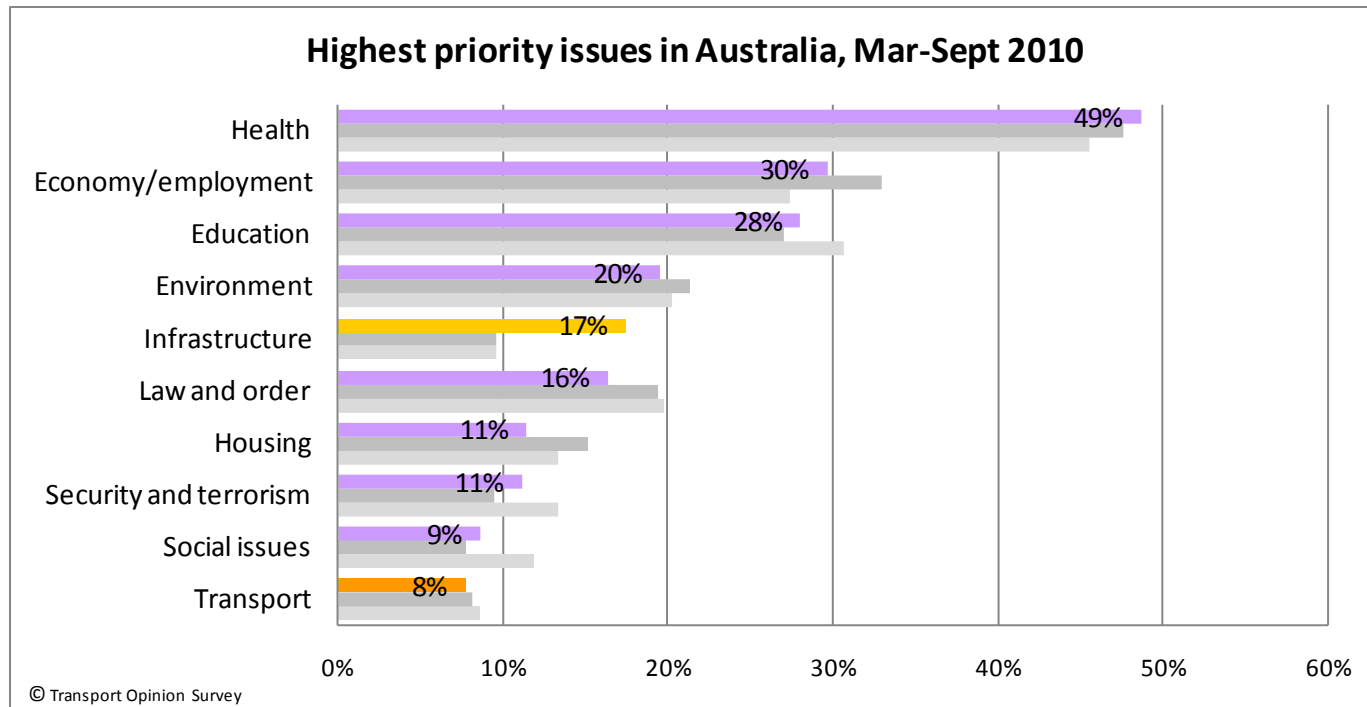
- Quarterly survey of 1,000 Australians over 18 years
- Representative sample across Australia
- Telephone survey by Taverner Research
- 3 quarters of data:
 - March 2010
 - June 2010
 - September 2010



Taverner Research

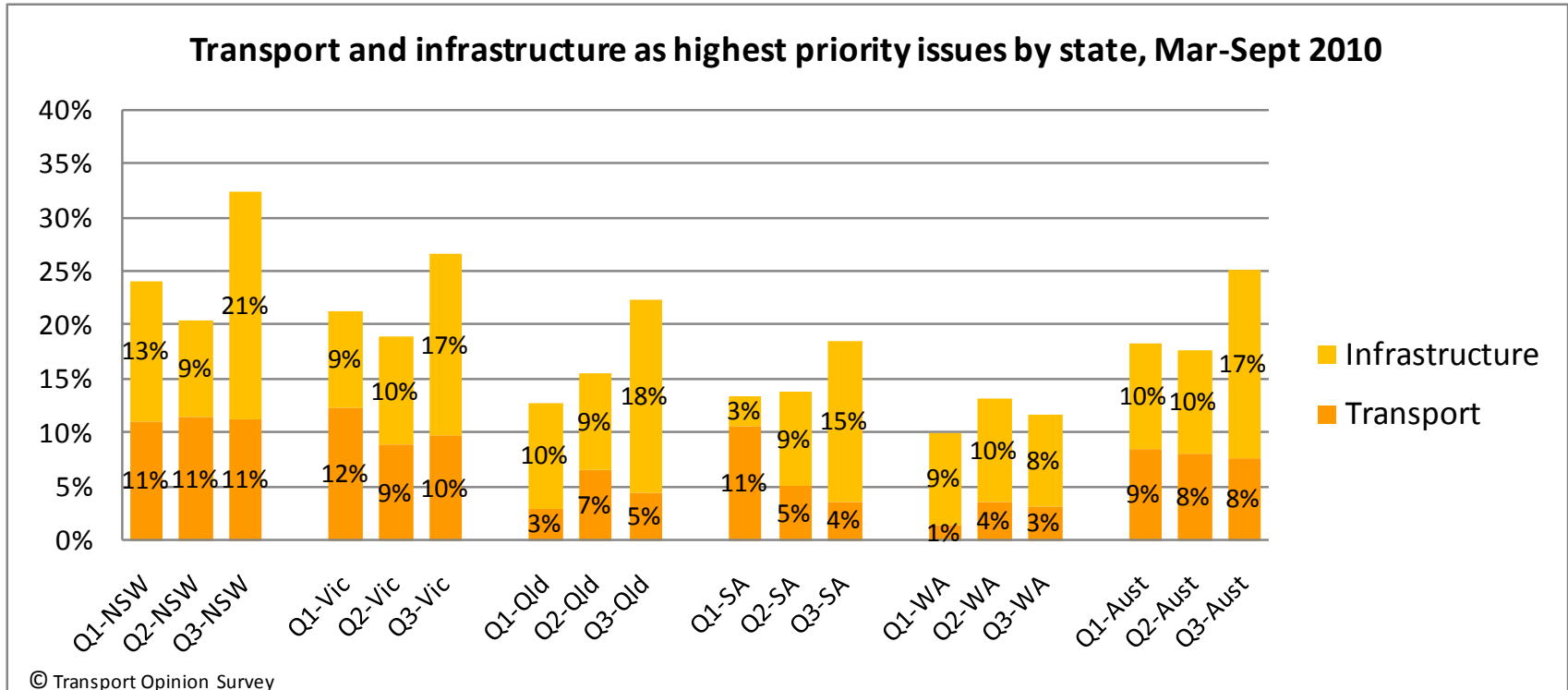
Which two of these issues do you think are the highest priority in Australia today?

- › Top issues: health, then economy/employment and education
- › 1 in 4 say either transport or infrastructure is one of top 2 issues



Responses sum to 200%

- › NSW and Vic more concerned about transport than Qld or WA

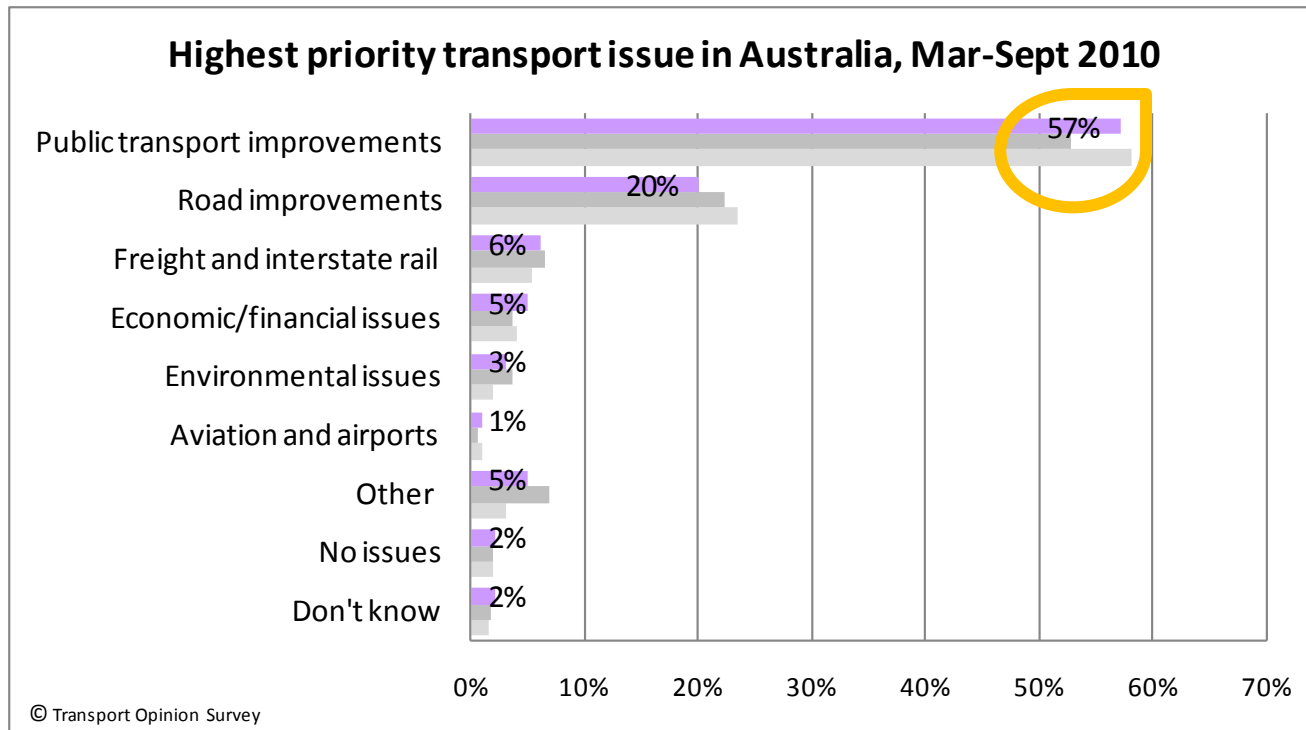


% of respondents nominating transport or infrastructure as one of the two highest priority issues in Australia

Highest priority issue in transport

What do you think is the highest priority issue for transport in Australia now?
(unprompted)

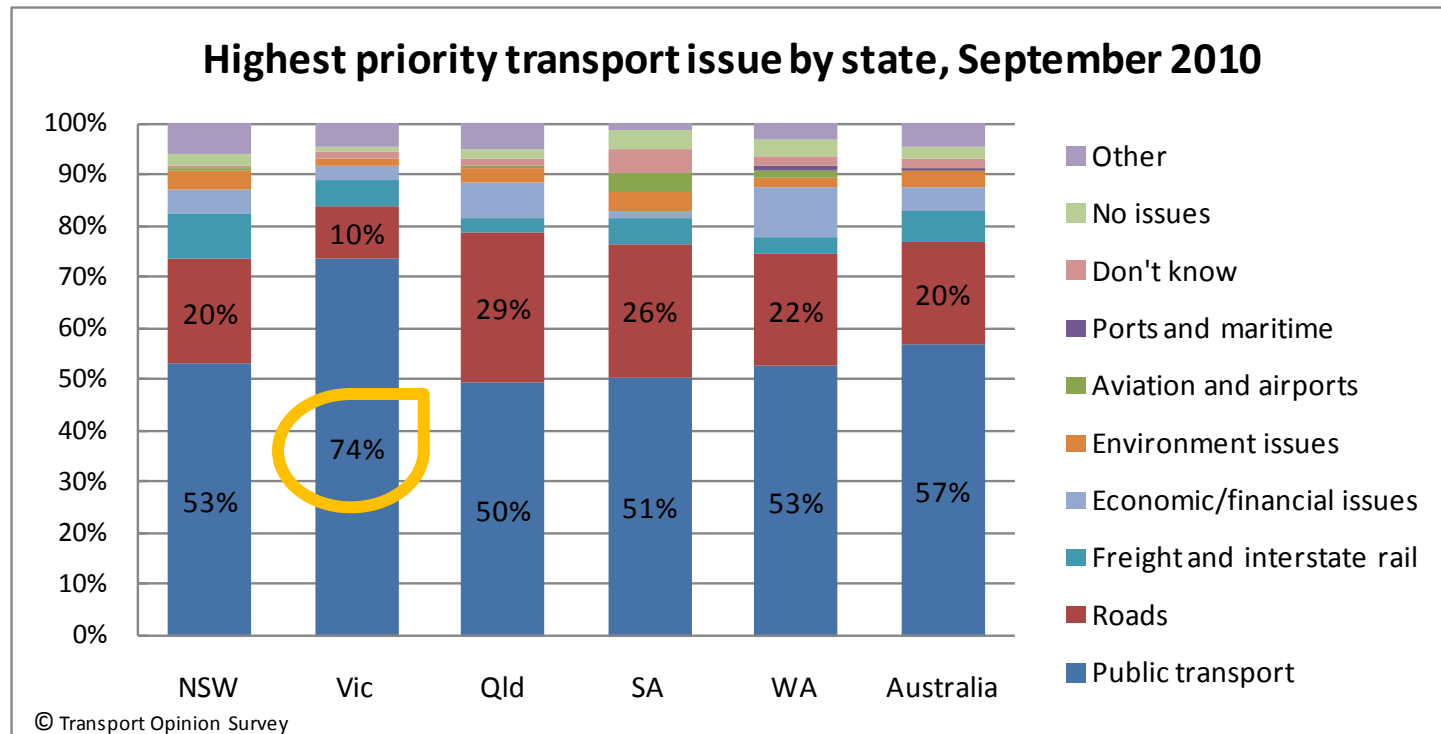
- › Public transport is the highest priority transport issue!



Responses sum to 100%

Highest priority transport issue – by state

- › 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”

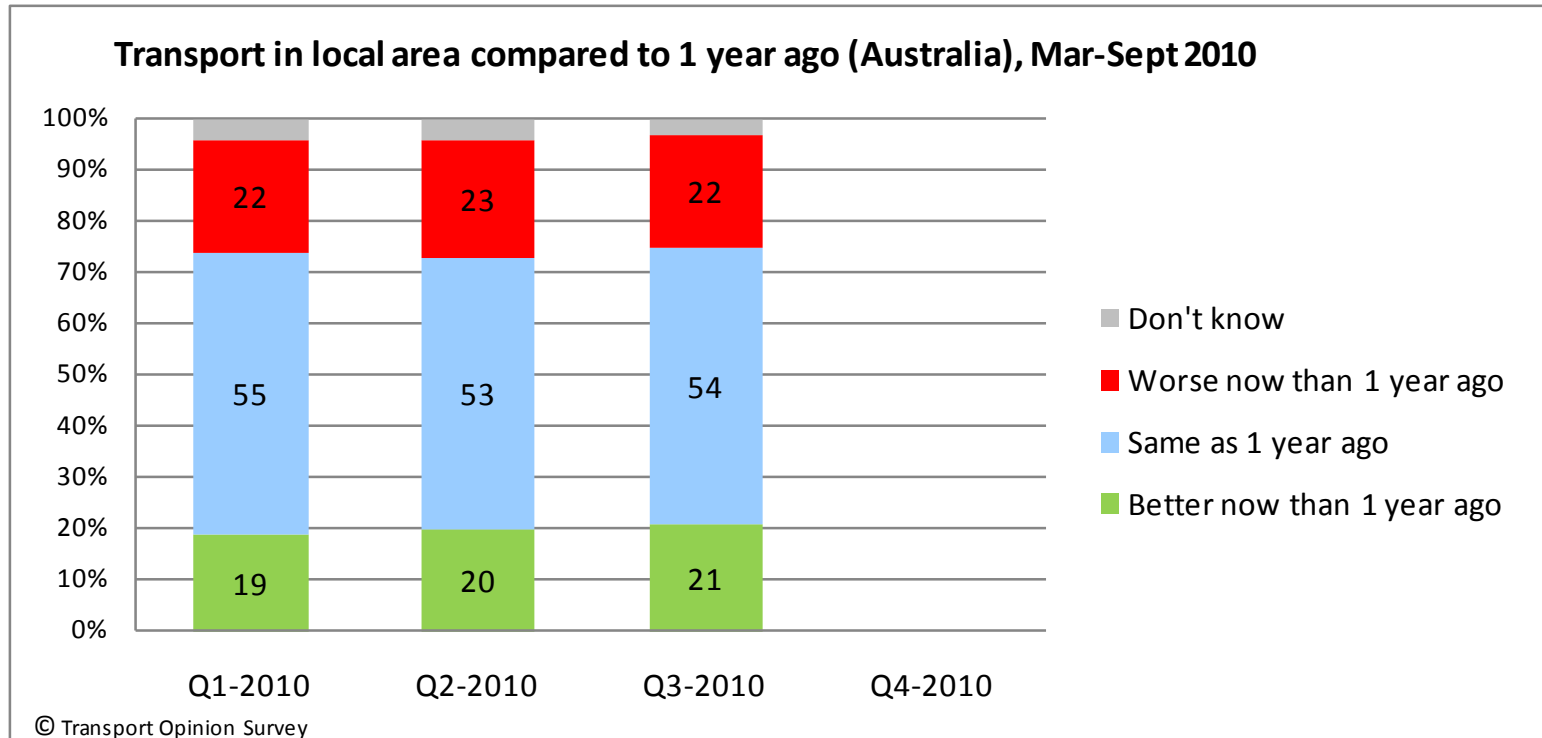
Highest priority is Public Transport – Qld regional city respondents

- › “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

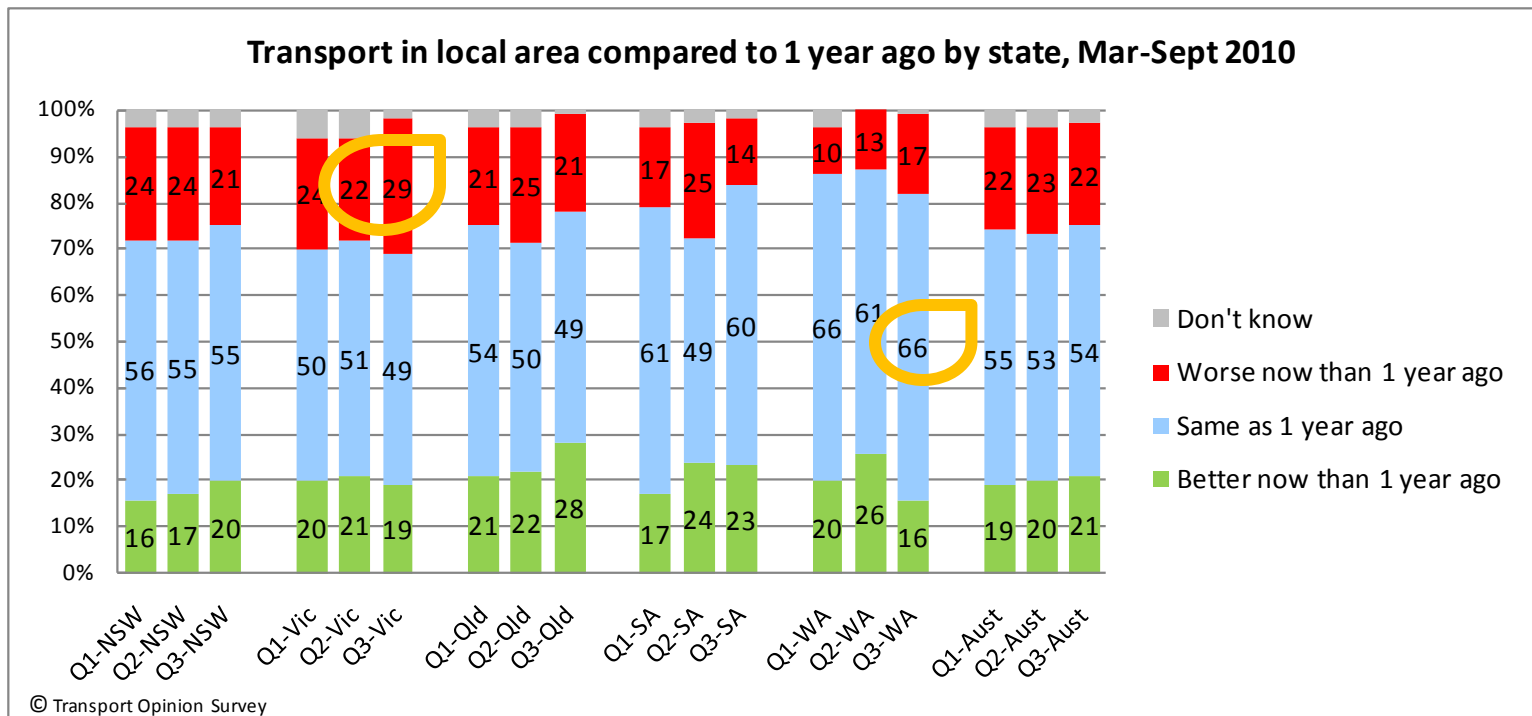
Compared to 1 year ago, do you think the state of transport in general in your local area is better now, the same, or worse now?

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



Confidence about transport – by state

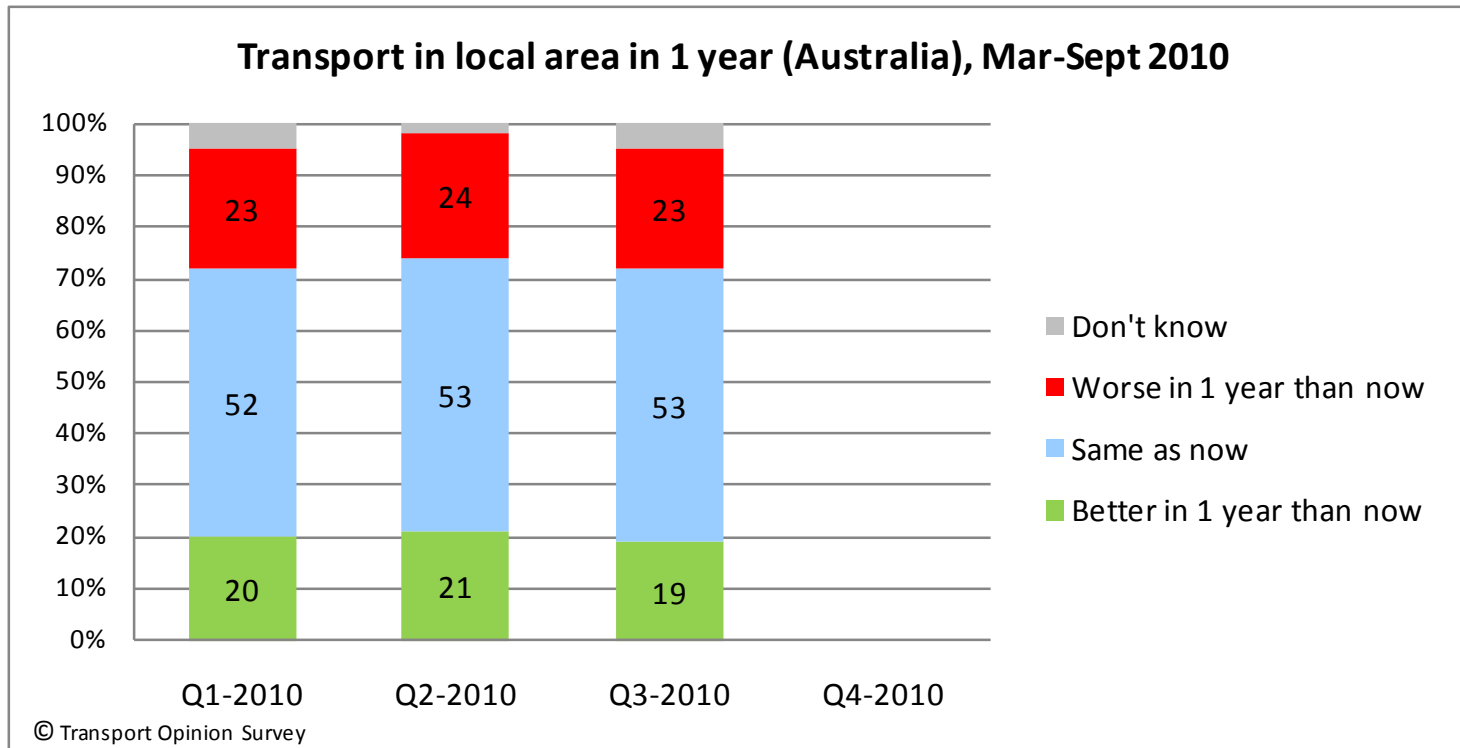
- › Vic most negative
- › WA – transport is the same



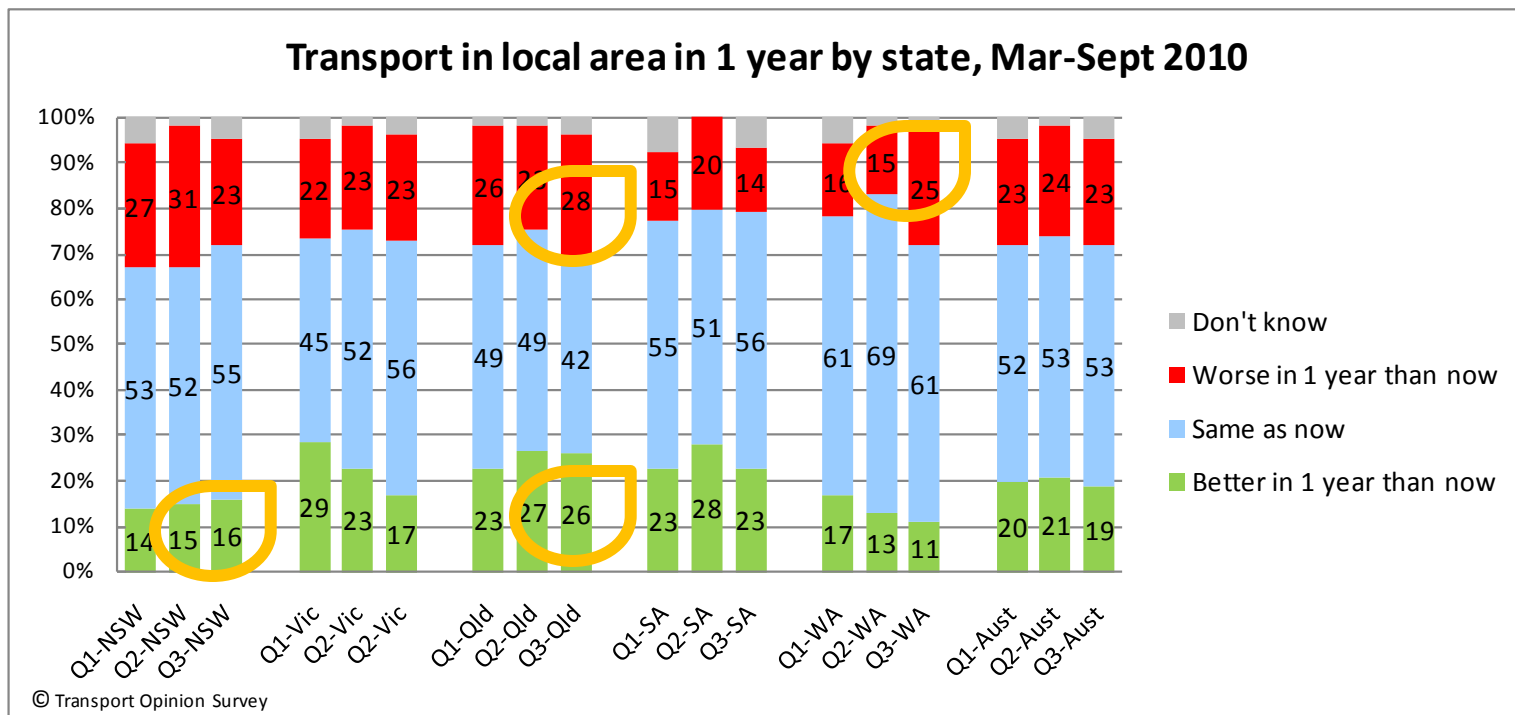
Confidence about transport – local area in 1 year

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



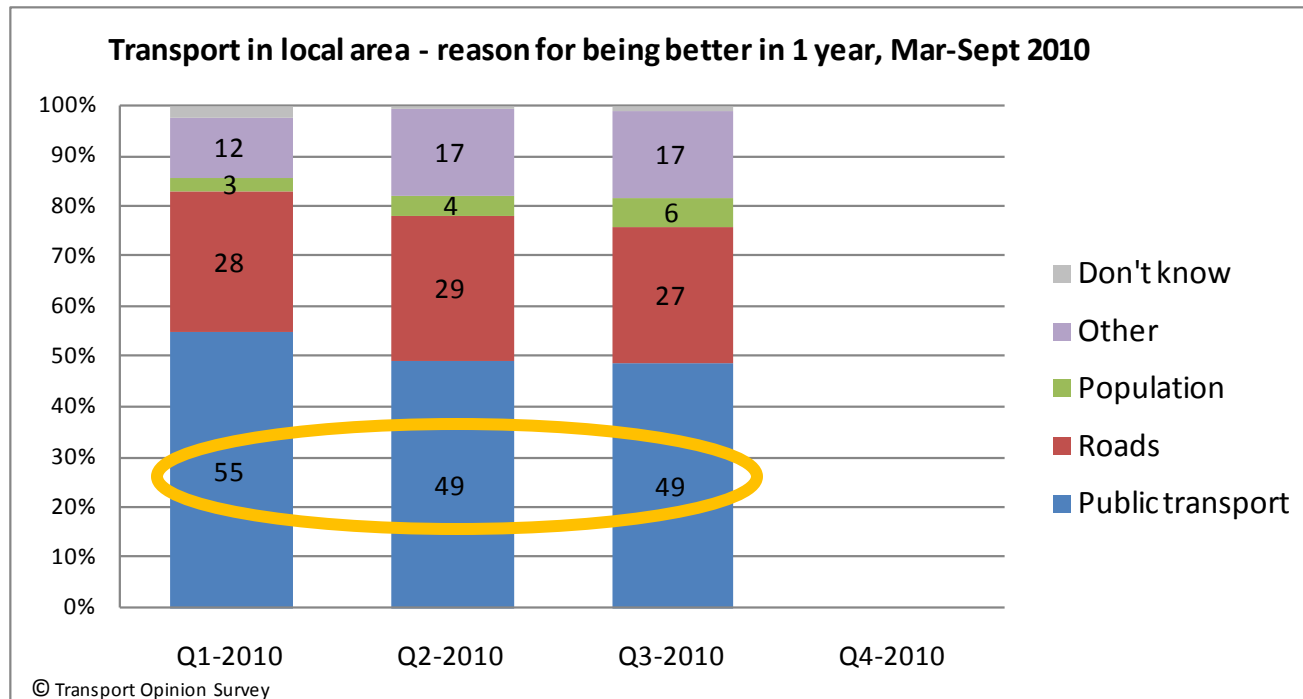
- › WA – transport the same, but becoming more negative
- › NSW most pessimistic, Qld polarised



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)

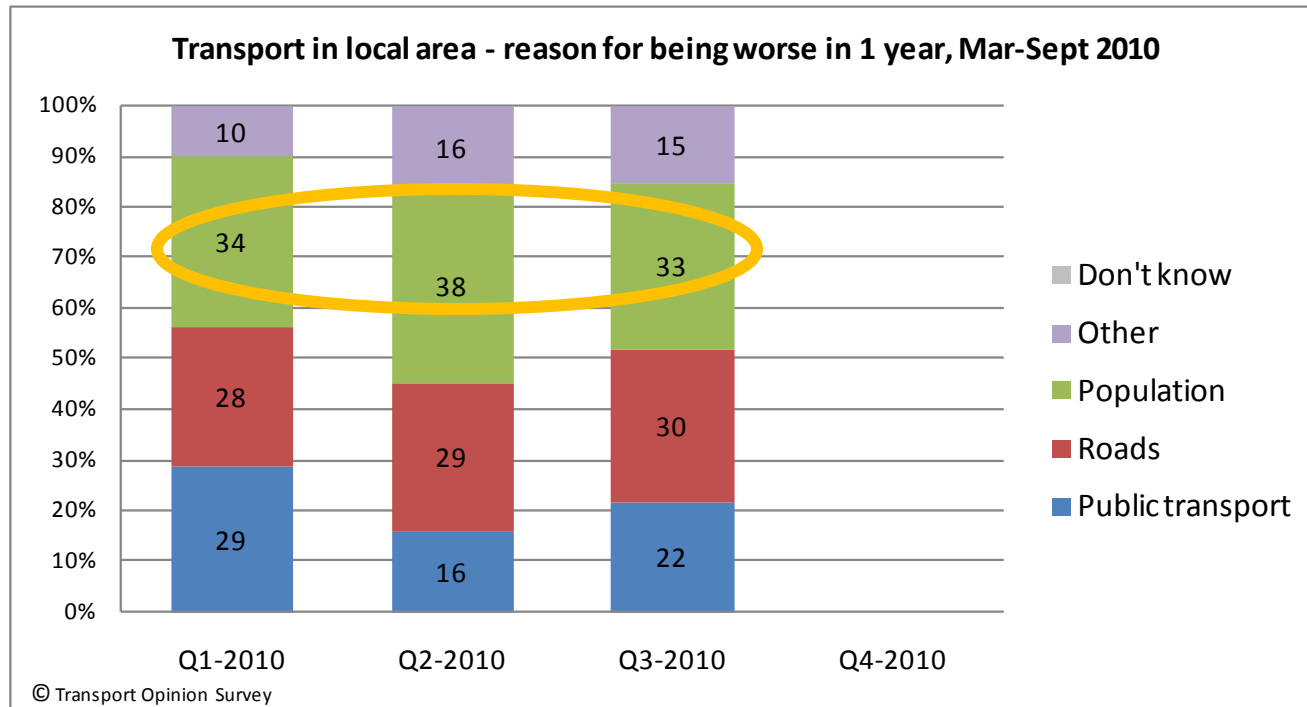
- › Better in 1 year – thinking of public transport



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



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

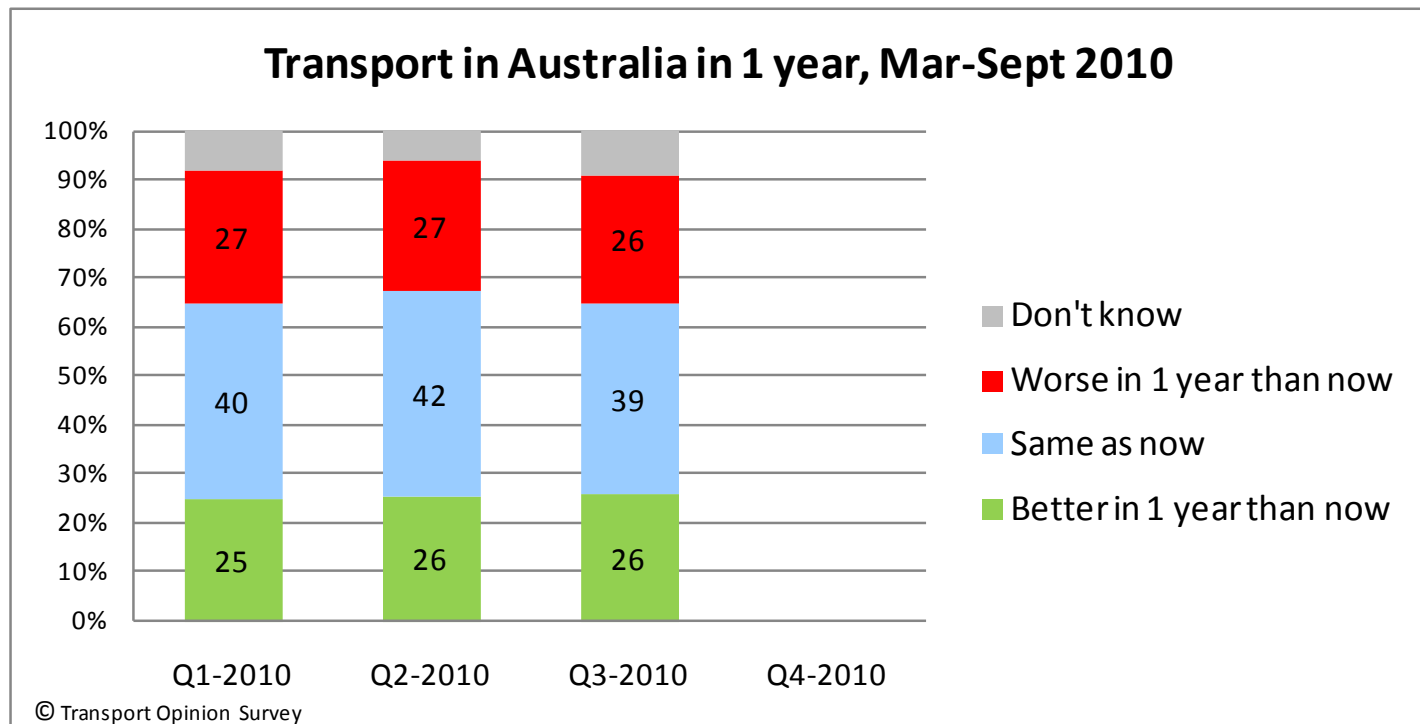
Worse in 1 year’s time in local area because..

- › 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”

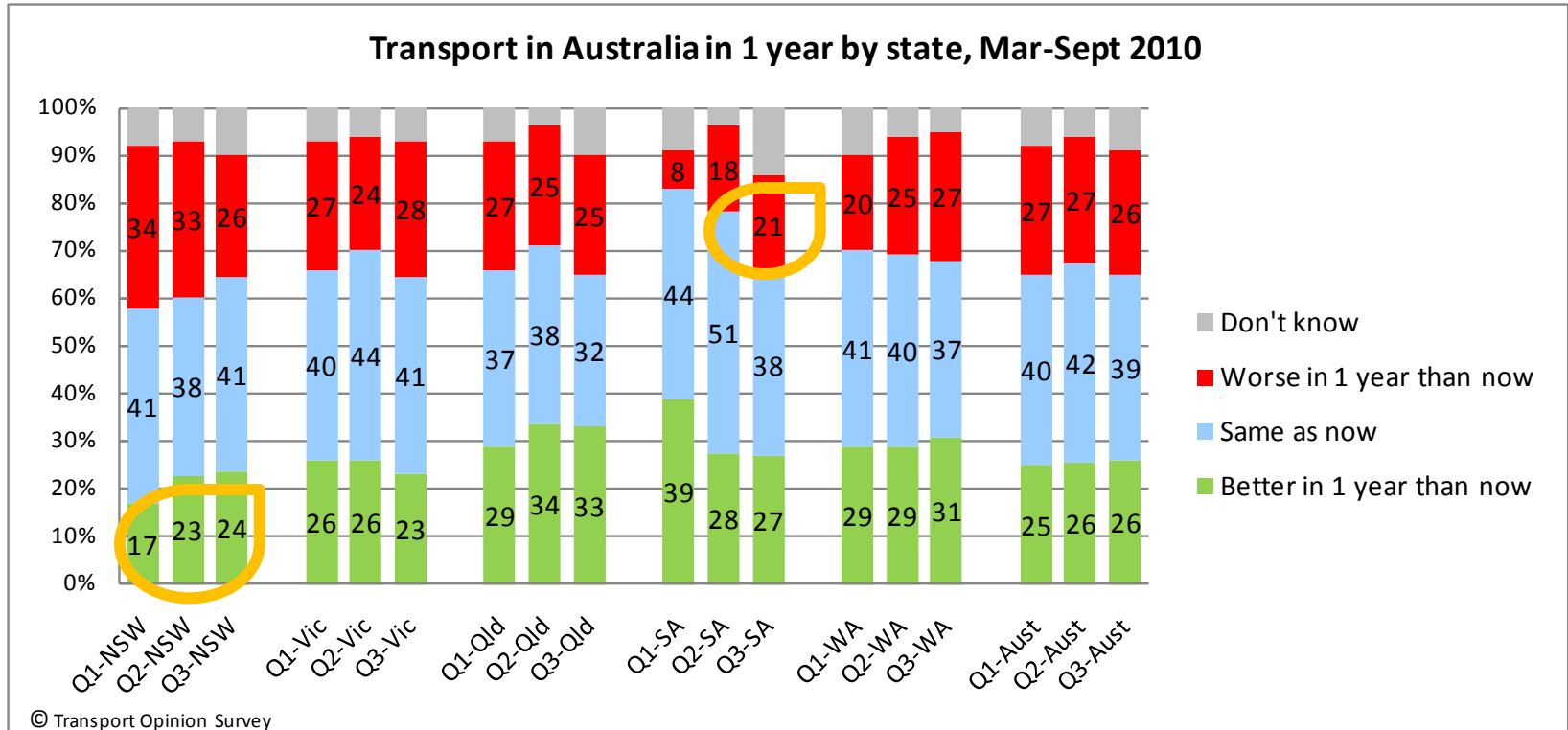
Confidence about transport – Australia in 1 year

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



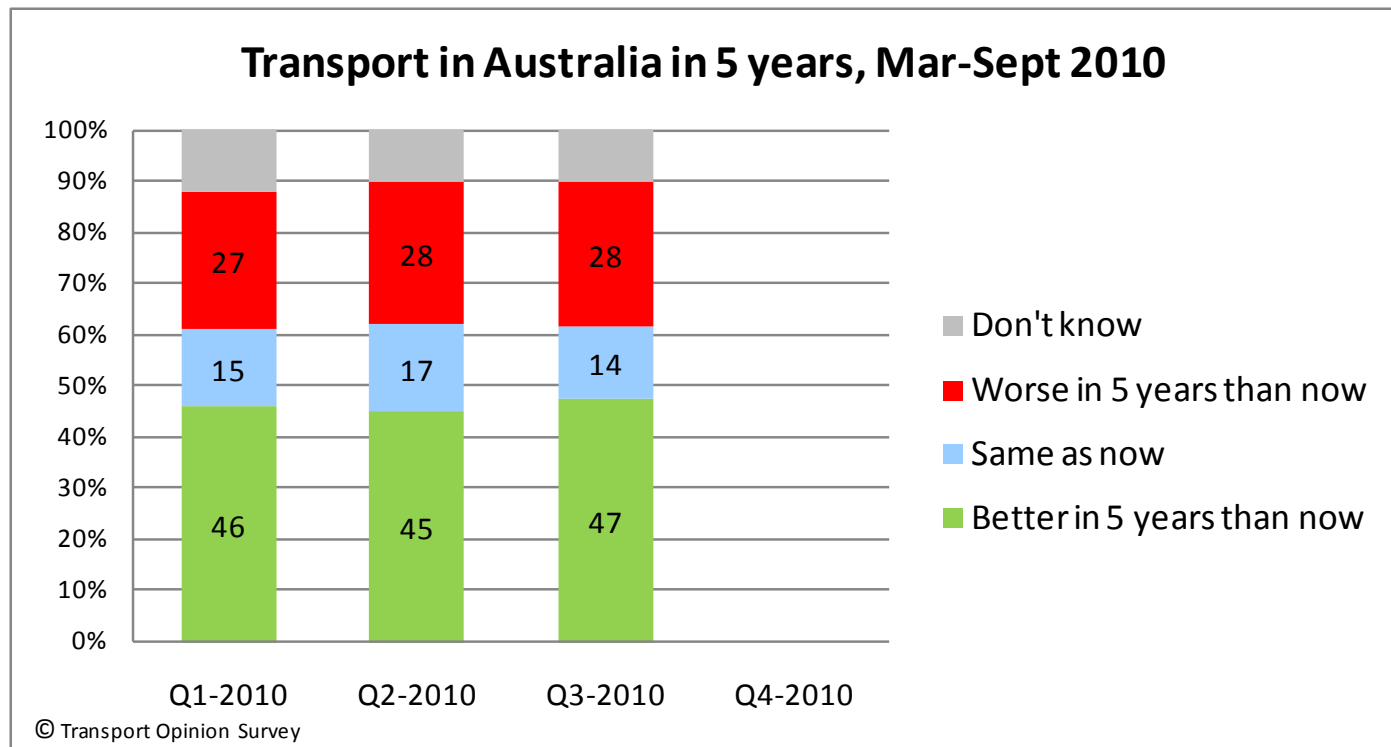
- › NSW becoming more positive, SA more negative and don't know



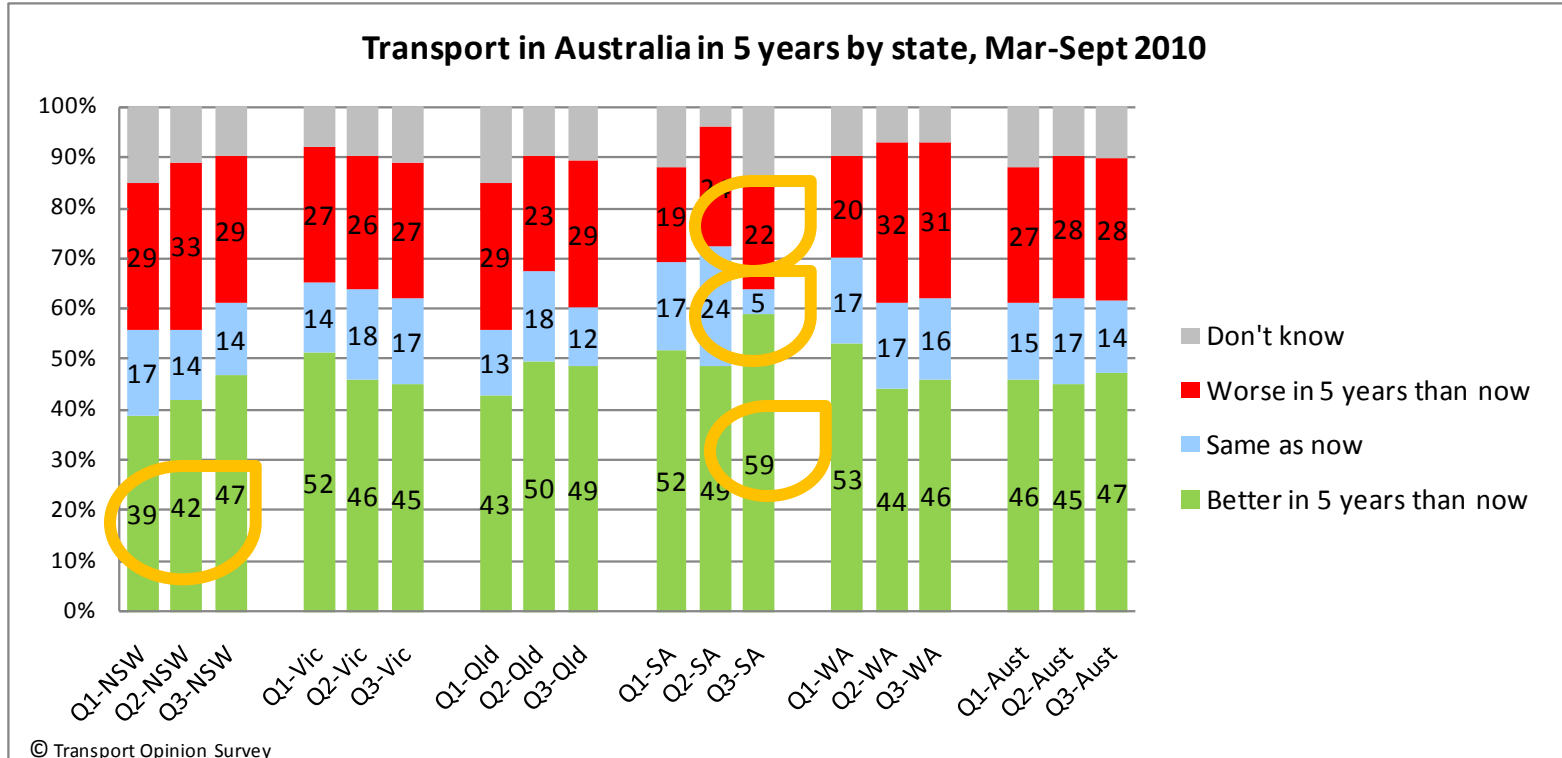
Confidence about transport – Australia in 5 years

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



› NSW becoming more confident, SA most confident

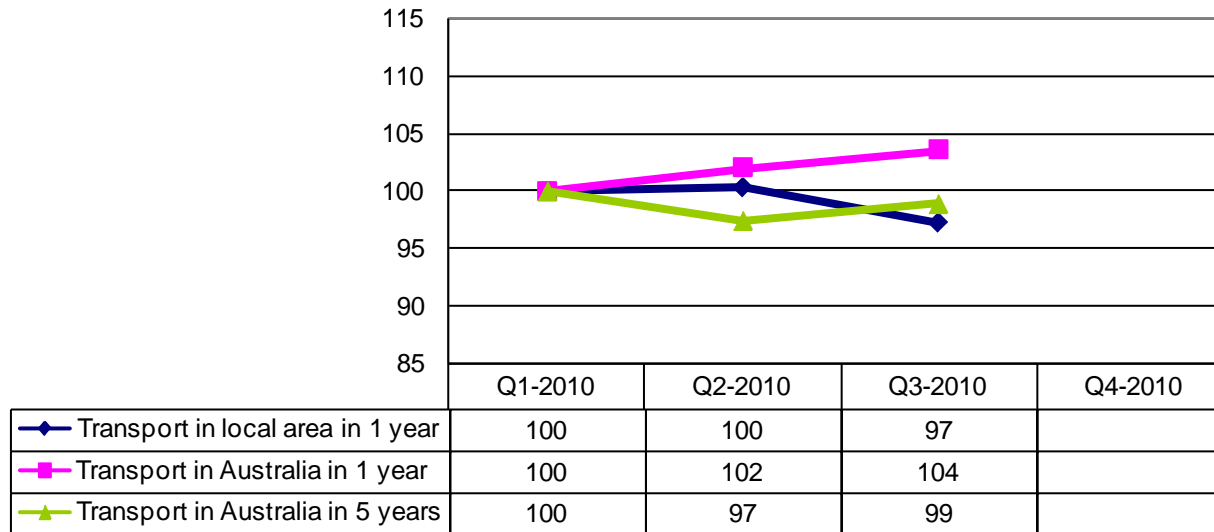


TOPS index – change in confidence over time

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

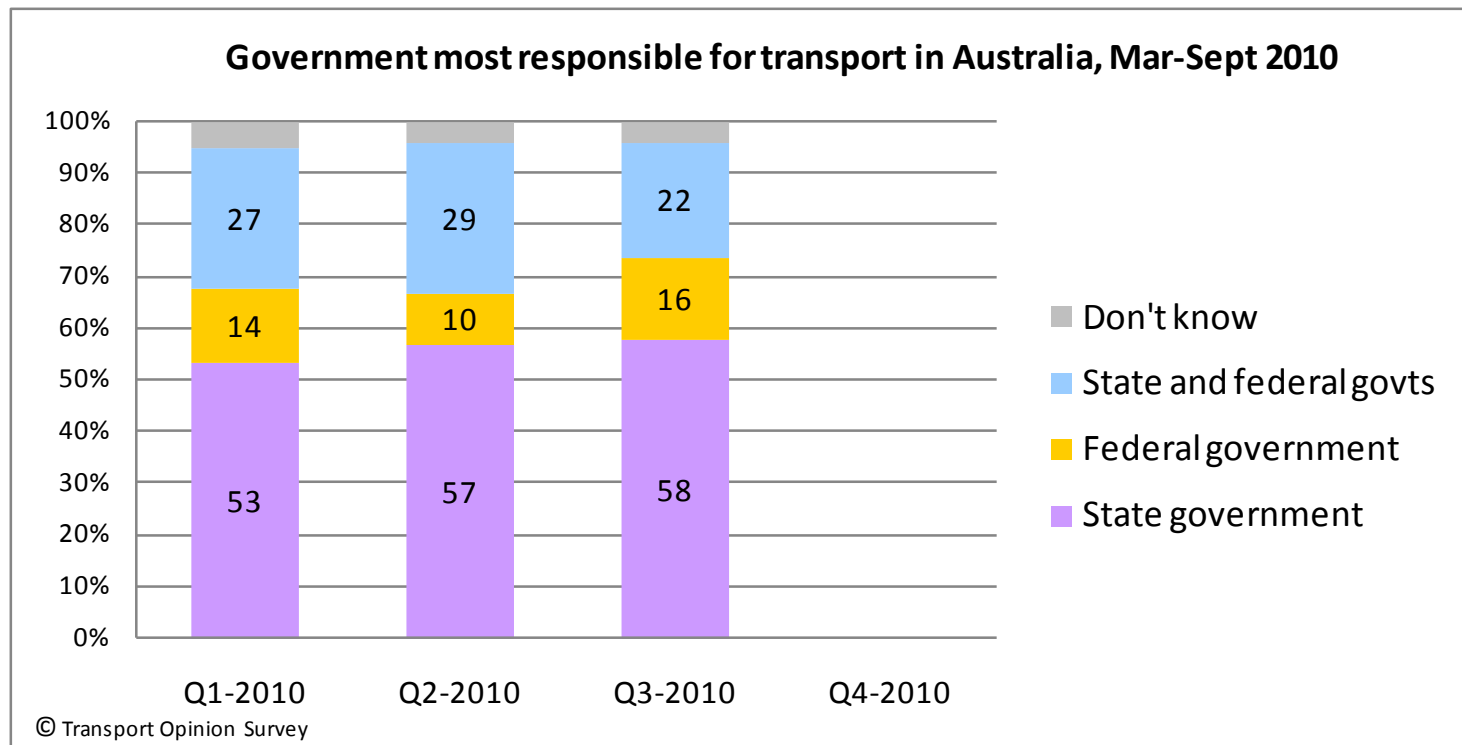
- › Australians becoming more confident about transport improving in Australia in 1 yr
- › Australians becoming less confident about transport improving in local area

ITLS-Interfleet TOPS Index of Transport Confidence



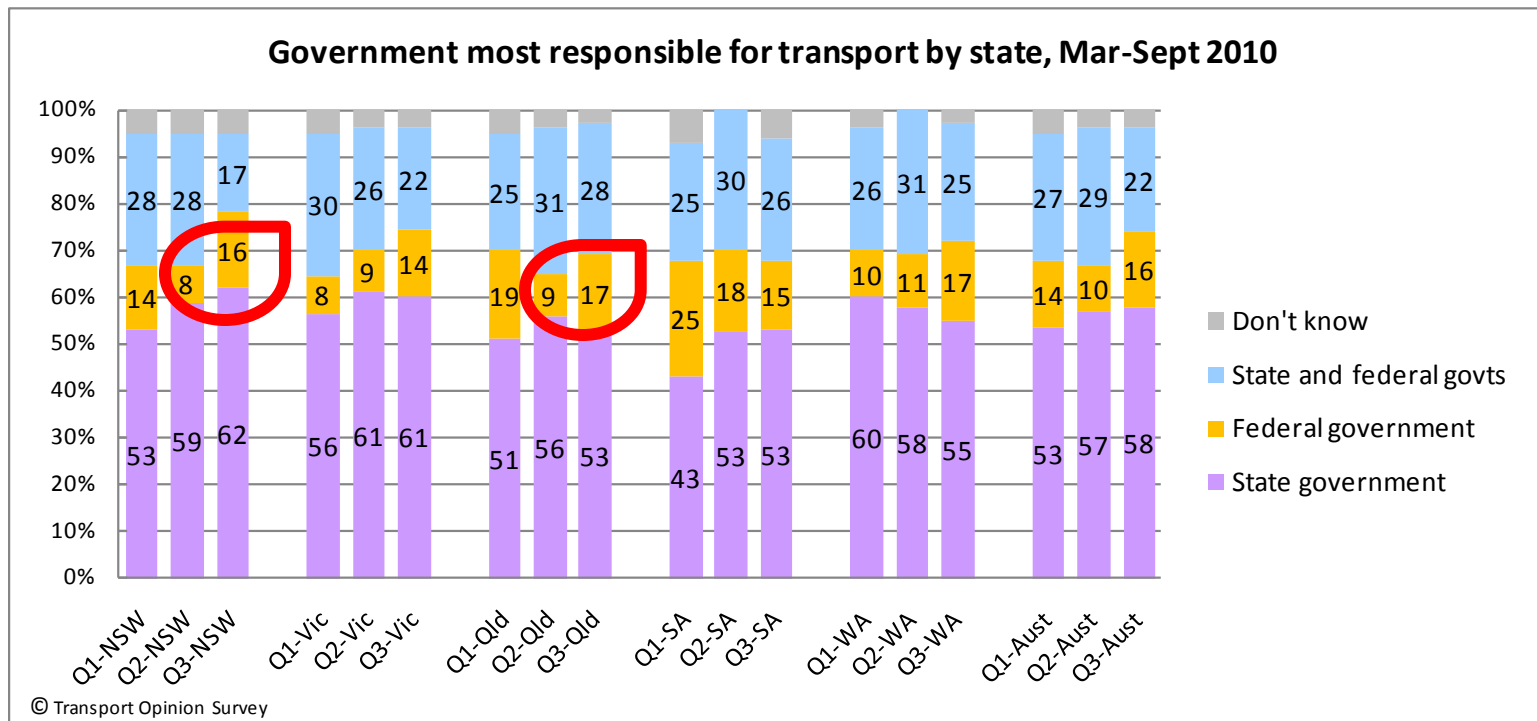
Do you think your State government or the Australian federal government is most responsible for transport?

› State govt is most responsible



Govt responsibility for transport – by state

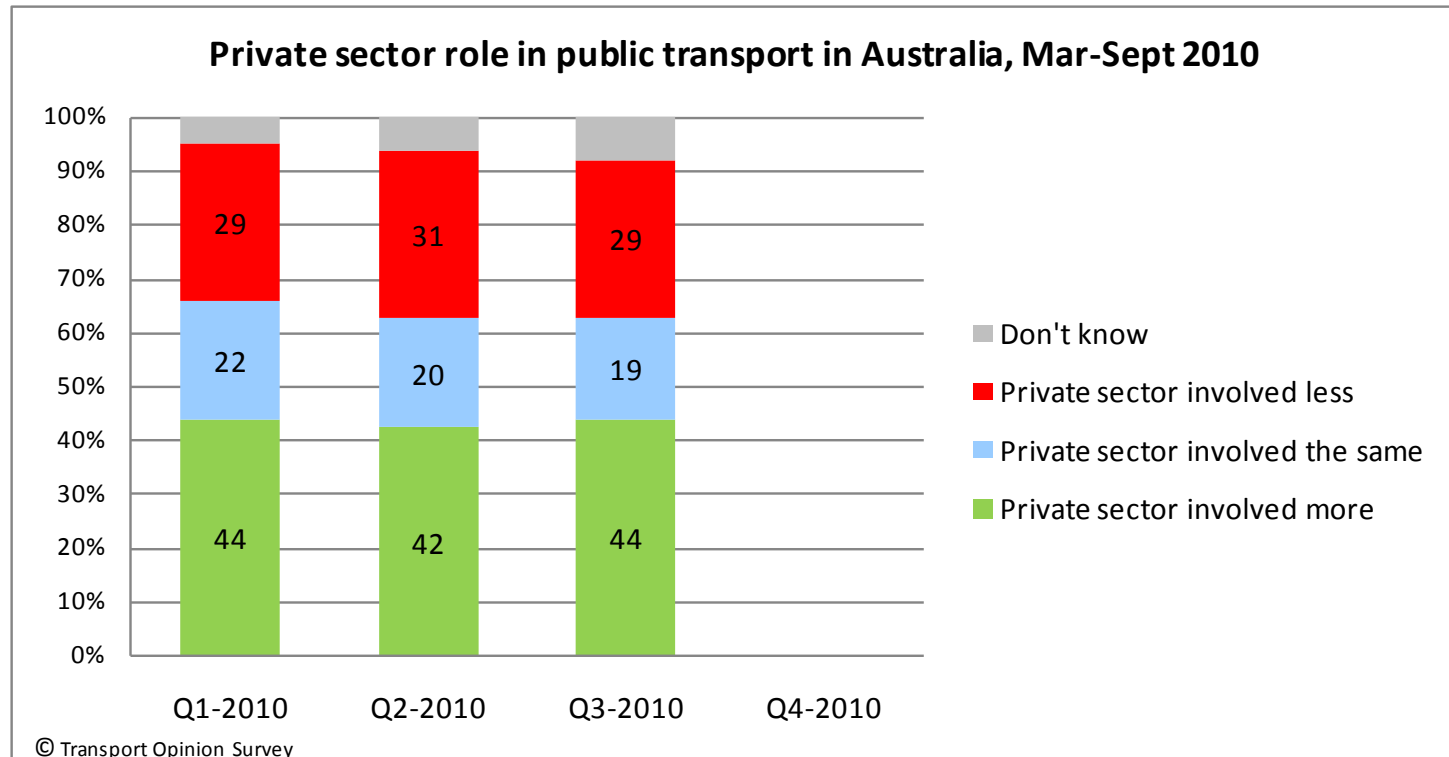
- › NSW and Qld – election announcements of Epping-Parra Rail, Redcliffe Rail



Private sector involvement in public transport

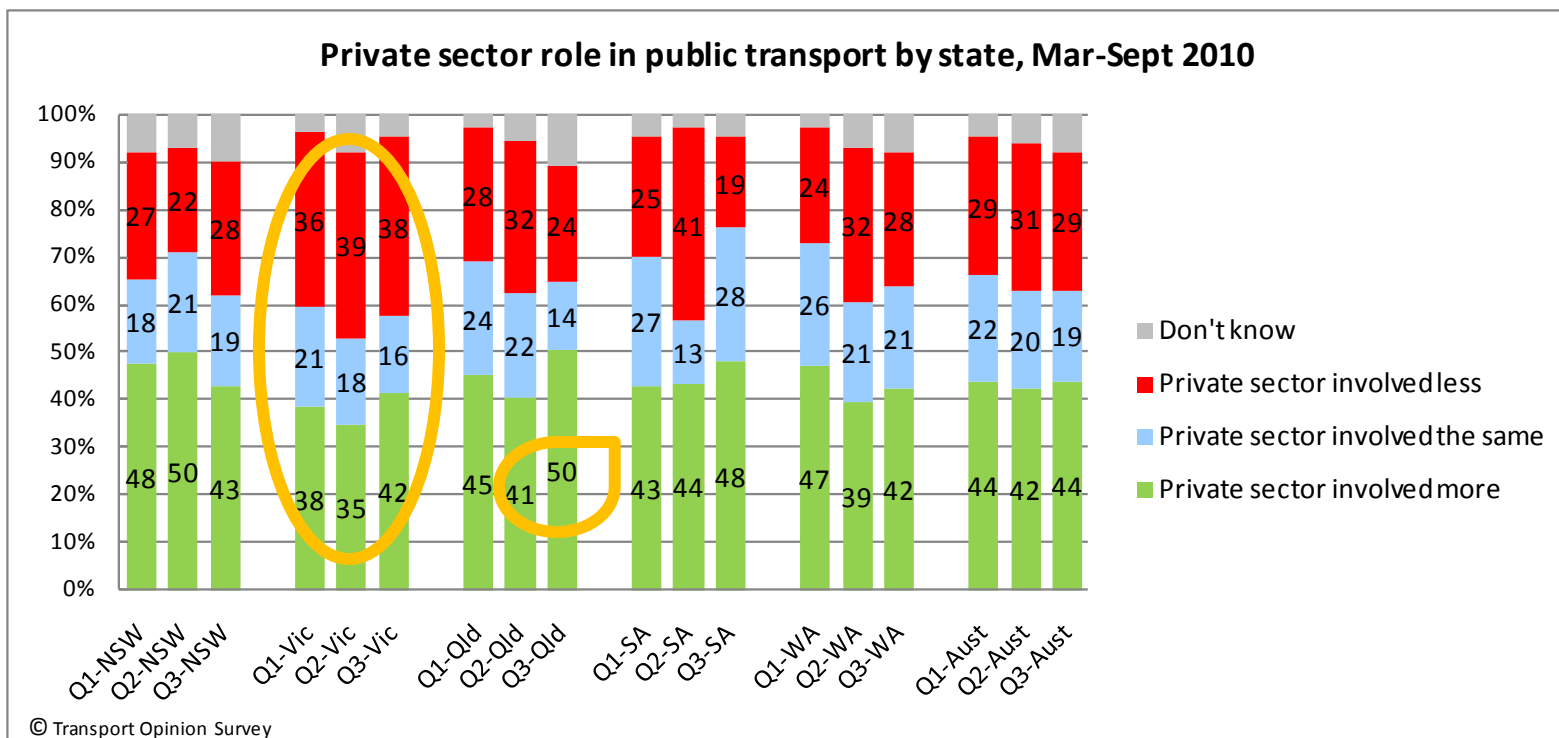
Do you think the private sector should be involved more, the same as now, or involved less in the provision of public transport?

- › More people want more involvement rather than less



Private sector involvement – by state

- › Victorians least supportive
- › Qld keen



- › 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

1. Keep in touch with TOPS

- › See TOPS reports at sydney.edu.au/business/itls/tops
- › Register for quarterly emails

2. Use TOPS for advocacy

3. Build on TOPS

- › Add questions, more analysis

Next TOPS release: 8 December 2010



Sydney Morning Herald
30/03/2010
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Voters lose faith on transport

As the Keneally government attempts to sell its new MyZone ticketing system, due to begin on April 18, a survey suggests the Premier may have an almost impossible task ahead. The "transport opinion survey" of 1000 people across Australia, commissioned by the Institute of Transport and Logistics Studies at the University of Sydney, finds only 14 per cent of NSW commuters believe their public transport system will improve over the next year, and 27 per cent believe it will worsen. By contrast, 39 per cent of South Australians were looking forward to better public transport. But in a result that suggests NSW voters are expecting a change of government in the election next year, 39 per cent believe transport will improve over the next five years.



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22 September 2010

Transport still considered a state government issue

The majority of Australians regard their state government as responsible for transport, but the latest quarterly Institute of Transport and Logistics Studies-Interfleet Transport Opinion Survey (TOPS) from the University of Sydney shows a small increase in respondents who believe it is a federal issue.

Professor David Hensher, Director of the Institute of Transport and Logistics Studies, says this increase can be explained by the transport announcements of the Epping-Manarua rail line in NSW and the Rosebery rail line in Queensland during the recent Federal Election campaign, which drew attention to the role of the federal government in transport.

The results of TOPS show more than half of the 1,000 adults surveyed said improving public transport was Australia's highest transport priority, with only 20 per cent saying better roads should be the top priority. Professor Hensher says Australians' support for private sector involvement in public transport remains high, with more residents in all states supporting more private sector involvement rather than less.

The latest survey results show only one in five Australians think transport in their local area will improve in the next year.

Australians remain confident about transport in Australia in five years time, with 47 per cent of respondents believing transport in Australia will be better five years down the track, similar to the previous quarter.

"NSW residents became more confident while Queensland residents are less confident about transport in Australia in five years" says Professor Hensher.

The quarterly TOPS, the first survey to measure transport opinions on a regular basis, is a reliable indicator of Australians' ongoing confidence about transport in their local area and transport in Australia.

The September 2010 quarterly report is at: <http://sydney.edu.au/business/itls/tops>

The Institute of Transport and Logistics Studies in the Faculty of Economics and Business provides education and conducts research in transport, logistics and supply chain management. Interfleet Technology is one of the world's leading rail consultancy groups providing strategic, operational, management and technical services to the international rail industry.

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