Highlights

Infrastructure increases as highest priority national issue
- In the September 2013 quarter, 8% of Australians nominated transport and 14% nominated infrastructure as one of the two highest priority issues in Australia today.

Public transport the highest priority for transport
- Half (49%) of Australians said that the highest priority issue for transport in Australia is public transport improvements, followed by road improvements (31%).

Transport not changing in local area
- 58% of Australians said that transport in their local areas is the same now as one year ago, up from 56% in the March 2013 quarter (the last survey period).

Low level of confidence about local transport in short-term
- Only 17% of Australians said that transport in their local areas will be better in one year’s time.

Views stable on transport in Australia in short-term
- 25% of Australians think that transport in Australia will be better in one year’s time, up from 24% in the March 2013 quarter.

Australians confident about transport in Australia in longer-term
- Australians continue to be more confident that transport in Australia will be better in five years than in one year, with 47% thinking that transport in Australia will be better in five years.

ITLS Index of Transport Confidence
- Compared to the launch of TOPS in March 2010, Australians are less confident about transport in their local areas in March 2013 (Confidence index: from 100 to 94), more confidence about transport in Australia in one year (Confidence index: from 100 to 104), and slightly more confident about transport in Australia in five year (Confidence index: from 100 to 101).

Preferred Public Transport Investment between Light Rail and Bus Rapid Transit
- 63% of Australians voted for Light Rail and 29% favoured Bus Rapid Transit as the preferred public transport investment.
- Australians who have the experience of Bus Rapid Transit in their capital cities (Queensland and South Australia) view Bus Rapid Transit much more favourably.

About the Transport Opinion Survey

The Transport Opinion Survey is a biannual survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia’s population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained interviewers.

The Quarter 3, September 2013 survey was conducted over 10-26 August 2013. Current issues in this quarter included the preferred public transport investment between Light Rail and Bus Rapid Transit.
Transport as a national priority
Which two of these issues [from list of 10 issues in random order] do you think are the highest priority in Australia today?

- In the September 2013 quarter, economy/employment was the highest priority issue in Australia, nominated by 42% of Australians, followed by health (40%) and education (34%).
- 8% of Australians nominated transport as one of the two highest priority issues in Australia today, and 14% nominated infrastructure.

In the September 2013 quarter, transport was most important in VIC (12%) among all states.
1. **Highest priority issue for transport**

*What do you think is the highest priority issue for transport in Australia now?*

- In the September 2013 quarter, half of Australians (49%) said that the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue in the twelve quarters of the survey. Around 31% of Australians nominated road improvements.

**Highest priority transport issue in Australia, Dec 2011-Sep 2013**

<table>
<thead>
<tr>
<th>Public transport improvements</th>
<th>Road improvements</th>
<th>Freight and interstate rail</th>
<th>Economic/financial issues</th>
<th>Aviation and airports</th>
<th>Environmental issues</th>
<th>Other</th>
<th>No issues</th>
<th>Don't know</th>
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</thead>
<tbody>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>49%</td>
<td>31%</td>
<td>7%</td>
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Note: Responses sum to 100%. September 2013 results are the top bar with % value, and previous four quarter results (March 2013, September 2012, March 2012, and December 2011) are the lower bars in grey. Responses were grouped into the above categories. “Other” includes responses about transport in general, responses about both public transport and roads, issues not included in other categories, and rebuilding transport after disasters.

- New South Wales, Victoria, and Western Australia regard public transport improvements as the highest priority issue in transport, where as Queensland and South Australia consider road improvements as the highest priority issue.

**Highest priority transport issue by state, Sep 2013**

© Transport Opinion Survey
2. Confidence about transport improving in local area

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?

- In the September 2013 quarter, 58% of Australians said that transport in their local areas is the same now as one year ago.

- In the September 2013 quarter, 23% of Western Australia residents said that transport in their local areas is better now than one year ago, higher than other states (14%-20%).

Do you think that in 1 year’s time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?
• In the September 2013 quarter, 57% of Australians said that transport in their local areas will be the same in one year’s time. Only 17% said transport will be better.

Transport in local area in 1 year (Australia), until Sep 2013

• 26% of Western Australia residents believed that transport in their local areas will be better in one year; while only 14% of Victoria believed that transport in their local areas will be better in one year.

Transport in local area in 1 year by state, Jun 2010-Sep 2013
What were you thinking of most when answering that question [about transport in your local area in 1 year’s time]?

- In the September 2013 quarter, the 17% of Australians who said that transport in their local areas will be better in one year were thinking about both public transport (41%) and roads (38%) as two major reasons. “Other” includes 13% who were thinking of the government role in integration, planning and coordination.

Transport in local area - reason for being better in 1 year, until Sep 2013

- In the September 2013 quarter, the 22% of Australians who said that transport in their local areas will be worse in one year were thinking about roads (45%) and public transport (26%) as two major reasons. “Other” includes 12% thinking of the government role in integration, planning and coordination.

Transport in local area - reason for being worse in 1 year, until Sep 2013
3. Confidence about transport improving in Australia

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

- In the September 2013 quarter, 43% of Australians said that transport in Australia in one year will be the same as now. 25% of Australians said that transport in Australia will be better in one year’s time.

- In the September 2013 quarter, 28% of Victoria residents said that transport in Australia will be worse in one year, and 21% said that it will be better. Other states are relatively more confident.

Transport in Australia in 1 year, until Sep 2013

Transport in Australia in 1 year by state, Jun 2010- Sep 2013
Do you think that in 5 years’ time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the September 2013 quarter, Australians remained more confident that transport will be better in five years than in one year, with 47% thinking transport in Australia will be better in five years.

- In the September 2013 quarter, 51% of South Australia residents think that transport in Australia will be better in five years than now, more confident than people living in other states. In contrast, people living in Victoria are least confident, where 39% said that transport in Australia will be better in five years than now and 35% said it will be worse.
4. Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year’s time and transport in Australia in five years’ time are reported as changes in the TOPS Index.

A TOPS Index value of more than 100 means that Australians’ confidence about transport getting better is stronger than in March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2013 quarter compared to the March 2013 quarter:

- Australians became more confident about transport in their local area in one year’s time
- Australians became more confident about transport in Australia in one year’s time
- Australians became more confident about transport in Australia in five years time.

Compared to the launch of TOPS in March 2010, Australians are less confident about transport in their local areas in September 2013 (Confidence index: from 100 to 94), more confident about transport in Australia in one year (Confidence index: from 100 to 104), and slightly more confident about transport in Australia in five years (Confidence index: from 100 to 101).
5. **Preferred Public Transport Investment between Light Rail and Bus Rapid Transit**

In the September 2013 quarter, a new question was asked about the preferred public transport investment:

*If new transport investment in either a light rail or a bus rapid transit – both in a dedicated corridor away from other traffic - was proposed, which one would you vote for?*

- Overall, 63% of Australians voted for Light Rail and 29% preferred Bus Rapid Transit.
- In states where Bus Rapid Transit exists in the capital city, Bus Rapid Transit was more favoured (South Australia (41%) and Queensland (38%)). This is confirmed by other work undertaken in ITLS looking at perceptions in favour of Light Rail over Bus Rapid Transit.

**Vote for Light Rail or Bus Rapid Transit**

![Poll Results Graph]

When asked whether the respondent was thinking of any specific system in answering the above question:

- Overall, 51% of Australians were thinking of a specific system.
- More than half of residents in Queensland (56%) and New South Wales (54%) were thinking of a specific system, relatively higher than other States.

**Thinking of a Specific System when Voting**

![Poll Results Graph]
Timing of TOPS

The fieldwork for each quarter was conducted on the following dates:

- March 2010: 13-28 February 2010
- June 2010: 15-30 May 2010
- September 2010: 23 August-5 September 2010
- December 2010: 5-17 November 2010
- March 2011: 9-27 February 2011
- September 2011: 11-25 August 2011
- December 2011: 4-22 November 2011
- March 2012: 10-26 February 2012
- September 2012: 10-27 August 2012
- March 2013: 23 March-13 April
- September 2013: 10-26 August

More information

Visit the TOPS website for quarterly reports, media coverage and to register to receive TOPS updates by email each quarter.

http://sydney.edu.au/business/itls/tops

The Institute of Transport and Logistics Studies in The University of Sydney Business School provides education and conducts research in transport, logistics and supply chain management.

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