**Highlights**

- One in five Australians nominate either transport (9%) or infrastructure (10%) as one of the two highest priority issues in Australia today.
- Over half of Australians (58%) say the highest priority issue for transport in Australia is public transport improvements, more than twice as many as say road improvements (23%).
- Less than one in five Australians (19%) think transport in their local area has improved in the last year, with NSW residents the least positive.
- Only one in five Australians (20%) think transport in their local area will be better in one year’s time, with about half thinking it will be the same as now. Victorian residents are the most confident transport in their local area will be better in one year’s time.
- A quarter of Australians (25%) think transport in Australia will be better in one year’s time than now, while slightly more (27%) think it will be worse. NSW residents are the least confident of any state, while South Australian residents are clearly the most confident about transport improving.
- Australians are more confident that transport in Australia will be better in 5 years than in 1 year, with almost half (46%) thinking transport in Australia will be better in 5 years. NSW residents are the least confident of any state.
- 53% of Australians think their state government is most responsible for transport with Western Australian residents most likely to nominate their state government as responsible (60%), and South Australian residents least likely (43%). 27% of Australians nominate both the state and Australian federal governments and only 14% nominate the Australian federal government.
- 44% of Australians think the private sector should be involved more in the provision of public transport, while 29% think the private sector should be involved less. NSW residents are noticeably more positive than Victorian residents about private sector involvement in public transport.

**About the Transport Opinion Survey**

The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia. The sample is representative of Australia’s population distribution and demographic characteristics. Interviews are conducted by Taverner Research by telephone using trained interviewers. The Quarter 1, March 2010 survey was conducted over 13-28 February 2010. The survey quarter included media focus on the federal government’s health reform plans and the MySchool website, the release of MyZone fare reform and the Metropolitan Transport Plan in NSW, and the lead-up to state elections in South Australia and Tasmania.
1. Transport as a national priority

What two of these issues [from list of 11 issues] do you think are the highest priority in Australia today?

- The highest priority issues in Australia today are issues which are currently the focus of change and reform by the Australian federal government: health (nominated by 45% of Australians as one of the two highest priority issues), followed by education (31%) and economy/employment (27%).

- One in five Australians nominate either transport (9%) or infrastructure (10%) as one of the two highest priority issues in Australia today, which reflects respondents’ views that State governments are most responsible for transport.

2. Highest priority issue for transport

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

- Over half of Australians (58%) say the highest priority issue for transport in Australia is public transport improvements, while a quarter (23%) say road improvements are the highest priority.
3. 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?

- Less than one in five Australians (19%) think transport in their local area has improved in the last year.
- NSW residents are the least positive, with a quarter (24%) thinking transport in their local area is worse now than a year ago.

![Graph showing confidence about transport improving in local area]

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?

- Only one in five Australians (20%) think transport in their local area will be better in one year’s time, with about half thinking it will be the same as now.
- Victorians are the most confident transport in their local area will be better in one year’s time. NSW residents are the least confident, with only 14% thinking transport will be better and twice as many (27%) thinking transport will get worse.

![Graph showing confidence about transport in 1 year's time]
What were you thinking of most when answering that question [transport in local area in 1 year’s time]?  
- Australians who think transport in their local area is going to be better are more likely to be thinking about public transport (55%), while Australians who think transport is going to get worse are thinking about roads (28%) and population-related changes (34%), as well as public transport (29%).

4. 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?
- A quarter of Australians (25%) think transport in Australia will be better in one year’s time than now, while slightly more (27%) think it will be worse.
- NSW residents are the least confident of any state, with over one third (34%) thinking transport will be worse. South Australian residents are clearly the most confident about transport improving.
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?

- Australians are more confident that transport will be better in 5 years than in 1 year, with almost half (46%) thinking transport in Australia will be better in 5 years.
- NSW residents are the least confident of any state, although still more positive about the long-term in 5 years than the short-term in 1 year’s time.

5. Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey about transport getting better or worse are used to set an index of 100 for quarter 1, March 2010. Each quarter, change in community confidence about transport in the local area, transport in Australia in one year’s time and transport in Australia in 5 years’ time will be reported as changes in the index.
6. Government responsibility for transport

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

- 53% of Australians think their state government is most responsible for transport, with 27% nominating both their state and Australian federal governments and only 14% nominating the Australian federal government.
- Western Australian residents are most likely to say their state government is responsible (60%), while South Australian residents are least likely to say their state government (43%).

![State Government Responsibility Chart]

7. Private sector involvement in public transport

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

- 44% of Australians think the private sector should be involved more in the provision of public transport, while 29% think the private sector should be involved less.
- NSW residents are noticeably more positive than Victorian residents about private sector involvement in public transport.
- In every state, more residents support more private sector involvement rather than less involvement, although in Victoria the proportions are similar.

![Private Sector Involvement Chart]
More information

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.

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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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Outline

› What is TOPS?
› National priority issues
› Highest priority issue in transport
› Confidence about transport in local area and Australia
› TOPS index
› Government responsibility for transport
› Private sector involvement in public transport
› Summary
What is TOPS?

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

› About the survey
  - Quarterly survey of 1,000 Australians over 18 years
  - Representative sample across Australia
  - Telephone survey by Taverner Research
  - Quarter 1 surveys: 13-28 February 2010
Which two of these issues do you think are the highest priority in Australia today?

Top issues: health, then education and economy/employment
Variations by state

› One in five Australians nominated either transport or infrastructure as one of the two highest priority issues

› NSW and Vic more concerned about transport than Qld or WA
Change over time

- Updated every quarter

![Chart showing percentage changes over time for infrastructure and transport from Q1-2010 to Q4-2010.](chart.png)
What do you think is the highest priority issue for transport in Australia now? (unprompted)

Public transport is highest priority issue

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport improvements</td>
<td>58%</td>
</tr>
<tr>
<td>Road improvements</td>
<td>23%</td>
</tr>
<tr>
<td>Freight and interstate rail</td>
<td>5%</td>
</tr>
<tr>
<td>Economic/financial issues</td>
<td>4%</td>
</tr>
<tr>
<td>Environmental issues</td>
<td>2%</td>
</tr>
<tr>
<td>Aviation and airports</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
<tr>
<td>No issues</td>
<td>2%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

Responses sum to 100%
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 20mins 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 Roads (Sydney respondents)

› “The aging state of the road and public infrastructure/ years and years of not enough money being spent on maintaining these assets/ I think it would take substantial investment to bring these assets up to a certain standard so we can move forward”

› “The quality of the roads/ the safety and standard of the roads/ there is no dual carriage way between Sydney and Brisbane/ road deaths due to poor unsafe roads/ we have all this great transport but not the roads to put them on”

› “Traffic congestion on the roads/ to try and cut off the amount of cars on the road/ have the same system number plate system as they have in England where the last number on the number plate is odd or even selection for using the CBD during the day”

› “The roads/ Picton road - there are a lot of accidents, why are there so many accidents? Are there too many trucks on that road, there is a lack of overtaking lanes/ the truck drivers the way that they drive think they are the king of the road and don't care about the smaller cars and the smaller car drivers don't want to be stuck behind the trucks so it causes competition and accidents”
Highest priority issue in transport

Change over time

› Updated every quarter

- Aviation and airports
- Don't know
- Environmental issues
- No issues
- Other
- Economic/financial issues
- Freight and interstate rail
- Road improvements
- Public transport improvements
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?

<table>
<thead>
<tr>
<th></th>
<th>NSW</th>
<th>Vic</th>
<th>Qld</th>
<th>SA</th>
<th>WA</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don't know</td>
<td>16%</td>
<td>20%</td>
<td>21%</td>
<td>17%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Worse now</td>
<td>24%</td>
<td>24%</td>
<td>21%</td>
<td>17%</td>
<td>10%</td>
<td>22%</td>
</tr>
<tr>
<td>Same as</td>
<td>56%</td>
<td>50%</td>
<td>54%</td>
<td>61%</td>
<td>66%</td>
<td>55%</td>
</tr>
<tr>
<td>Better now</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The chart shows the percentage distribution of responses for each state and the country as a whole.
Confidence about transport

Change over time – Local area 1 year ago

› Updated every quarter

Don't know
Worse now than 1 year ago
Same as 1 year ago
Better now than 1 year ago
Confidence about transport

Local area in 1 year’s time

› 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?

› Victorians most confident about local transport getting better, NSW least confident
Reasons for confidence

Change in local area – better or worse in future

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

![Bar chart showing change in local area – better or worse in future]
Sydney residents – transport in local area in 1 year’s time

› 16% (34/207) think transport will be better
› 31% (65/207) think transport will be worse
› Reasons for thinking “better” or “worse”
Better in 1 year’s time in local area because:

› 65% (22/34) were thinking of public transport
   [Govt’s initiatives are being recognised]
   - “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 doing some rail work on a track line/ I'm hoping the timetable will be better and takes less time to get into the city and make it more accessible”
   - “They are going to duplicate the train line from Cronulla to Sutherland in peak hours”
   - “They are doing a lot of work in putting in a new railway station”
   - “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”
Reasons for “worse” – Sydney

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

› 35% (23/65) 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 “

› 35% (23/65) 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”

› 22% (14/65) thinking of road issues
  - “Because the maintenance of the roads is not keeping up with the aging of the asset ie the road/ it’s deteriorating year by year”
  - “Because nobody will give up a car and there is no room for the cars on the road now”
  - “The govt and councils are not doing anything about the roads to improve the roads”
  - “Traffic on the road, congestion can't improve unless they improve roads”
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?
Confidence about transport

Change over time – Australia in 1 year’s time

- Updated every quarter

![Bar chart showing confidence about transport over time in Q1 to Q4 of 2010.](chart.png)

- Q1-2010: 25% Better, 40% Same, 27% Worse, 18% Don't know
- Q2-2010: 40% Better, 27% Same, 25% Worse, 18% Don't know
- Q3-2010: 27% Better, 40% Same, 25% Worse, 18% Don't know
- Q4-2010: 25% Better, 40% Same, 27% Worse, 18% Don't know
Australia in 5 years’ time

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?

SA and WA more positive than NSW and Qld
Confidence about transport

Change over time – Australia in 5 years’ time

› Updated every quarter

![Bar chart showing confidence about transport over time in Q1, Q2, Q3, and Q4 of 2010. The chart indicates different percentages for each quarter, with some groups showing improvement, some showing no change, and some showing deterioration. The chart uses colors to differentiate between 'Don’t know', 'Worse in 5 years than now', 'Same as now', and 'Better in 5 years than now'.]
Change in confidence over time

- Index = 100 in March 2010, based on ratio: better/(better+worse)
- Index > 100 means Australians are more confident about transport improving
- Index < 100 means Australians are less confident about transport improving

**TOPS index**

<table>
<thead>
<tr>
<th></th>
<th>Q1-2010</th>
<th>Q2-2010?</th>
<th>Q3-2010?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local area transport in 1 year</td>
<td>100</td>
<td>103</td>
<td>103</td>
</tr>
<tr>
<td>Aust transport in 1 year</td>
<td>100</td>
<td>89</td>
<td>85</td>
</tr>
<tr>
<td>Aust transport in 5 years</td>
<td>100</td>
<td>106</td>
<td>111</td>
</tr>
</tbody>
</table>
Govt responsibility for transport

State vs federal government

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

Change over time

› Updated every quarter
Do you think the private sector should be involved more, involved less, or the same as now, in the provision of public transport?
Private sector involvement in public transport

Change over time

- Updated every quarter

![Graph showing change over time in private sector involvement in public transport from Q1-2010 to Q3-2010.]

- Q1-2010: 44% Private sector involved more, 22% Private sector involved the same, 29% Don't know
- Q2-2010: 22% Private sector involved more, 22% Private sector involved the same, 56% Don't know
- Q3-2010: 44% Private sector involved more, 22% Private sector involved the same, 34% Don't know
Summary

Highlights

› Over half of Australians say public transport is the highest priority issue for transport
› About half of Australians 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
  If transport getting worse, thinking of roads, public transport and population impact
› Australians more confident about transport being better in 5 years than in 1 year
› 53% of Australians say their state govt is most responsible for transport
› 44% of Australians support more private sector involvement in public transport
› Next TOPS release: June 2010