

**Institute of Transport and Logistics Studies (ITLS)
Transport Opinion Survey (TOPS)**

Quarter 3, Sep 2012

Highlights

Infrastructure increases as highest priority national issue

- In the September 2012 quarter, 8% of Australians nominated transport and 13% nominated infrastructure as one of the two highest priority issues in Australia today.

Public transport the highest priority for transport

- Over half (51%) of Australians said that the highest priority issue for transport in Australia is public transport improvements, followed by road improvements (27%).

Transport not changing in local area

- 55% of Australians said that transport in their local areas is the same now as one year ago, down from 56% in the March 2012 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

- 20% of Australians think that transport in Australia will be better in one year's time, down from 24% in the March 2012 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 43% thinking that transport in Australia will be better in five years.

ITLS Index of Transport Confidence

- The TOPS Index shows the lowest confidence levels in September 2012 with respect to transport in Australia in one year and transport in Australia in five years (Confidence index: 88 and 95 respectively); while confidence about transport in the local area slightly improved to 87, from 86 in the March 2012 quarter (the lowest index since the launch of TOPS in March 2010).

Crowding on Local Train Services

- In the September 2012 quarter, 43% of Australians reported that the level of crowding on local train services in the peak is intolerable.

Misinterpretation of Bus Rapid Transport (BRT)

- Bus Rapid Transit is an innovative public transport (PT) system and value for money investment in public transport, which involves buses on dedicated corridors. However, only 8% of Australians correctly described BRT as buses operating in their own corridor.

About the Transport Opinion Survey

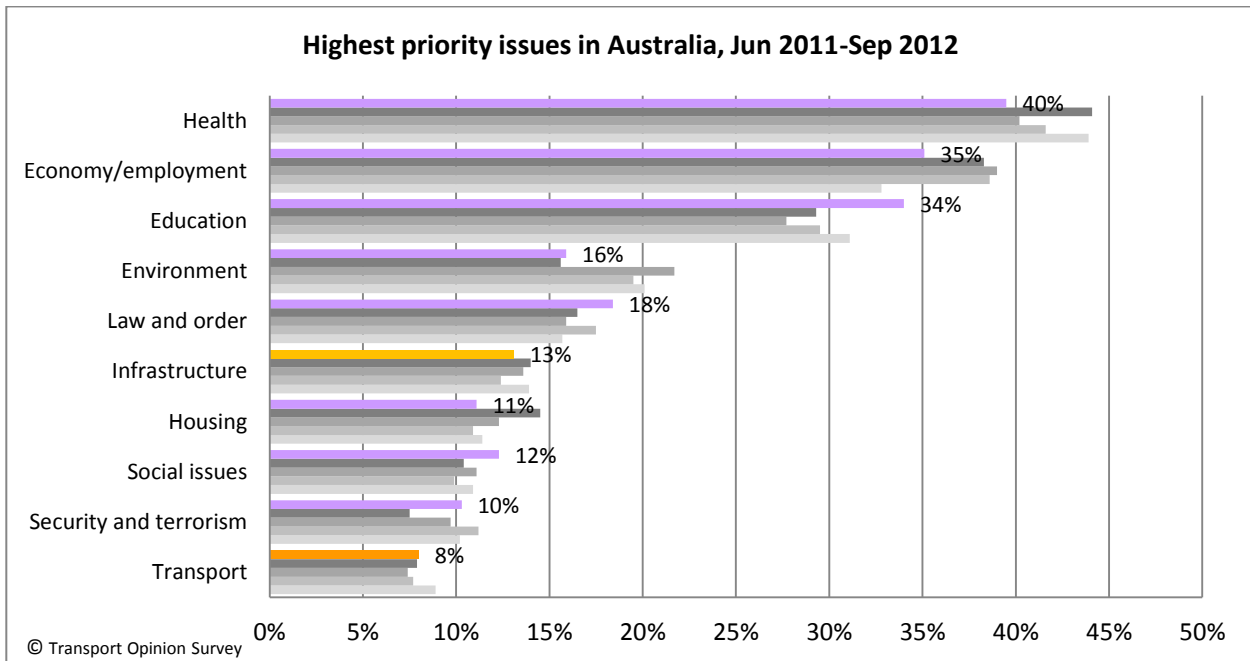
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained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

The Quarter 3, September 2012 survey was conducted over 10-27 August 2012. Current issues in this quarter included perceptions of rail crowding and awareness of bus rapid transport (BRT).

Transport as a national priority

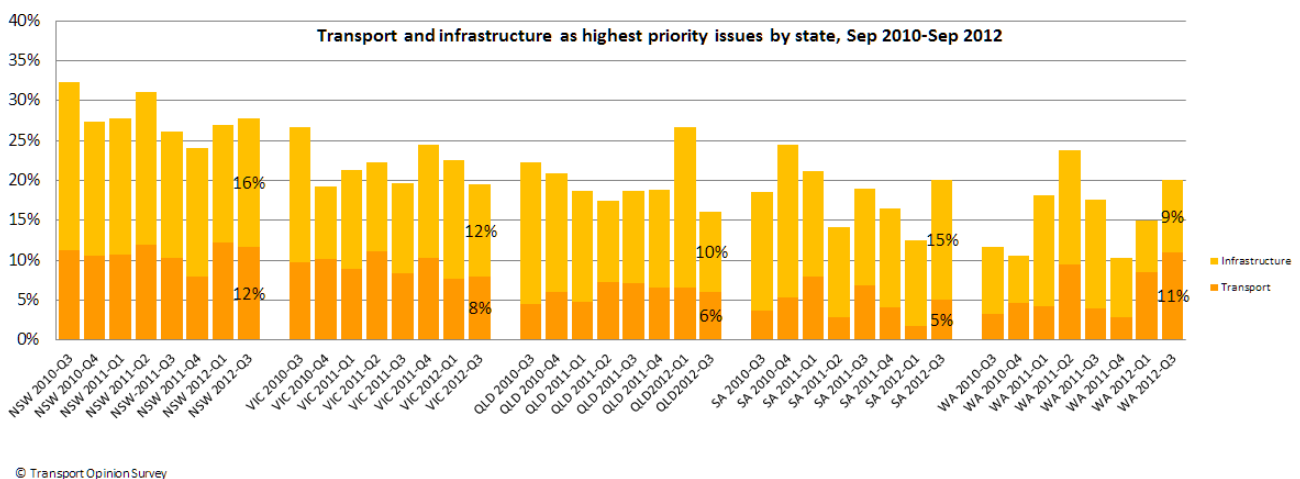
Which two of these issues [from list of 10 issues in random order] do you think are the highest priority in Australia today?

- In the September 2012 quarter, health was the highest priority issue in Australia, nominated by 40% of Australians, followed by economy/employment (35%) and education (34%).
- 8% of Australians nominated transport as one of the two highest priority issues in Australia today, and 13% nominated infrastructure.



Note: Responses sum to 200% for this figure only. September 2012 results are the top bar with %value, and previous four quarter results (June 2011, September 2011, December 2011, and March 2012) are the lower bars in grey.

- In the September 2012 quarter, transport was most important in NSW (12%) among all states.

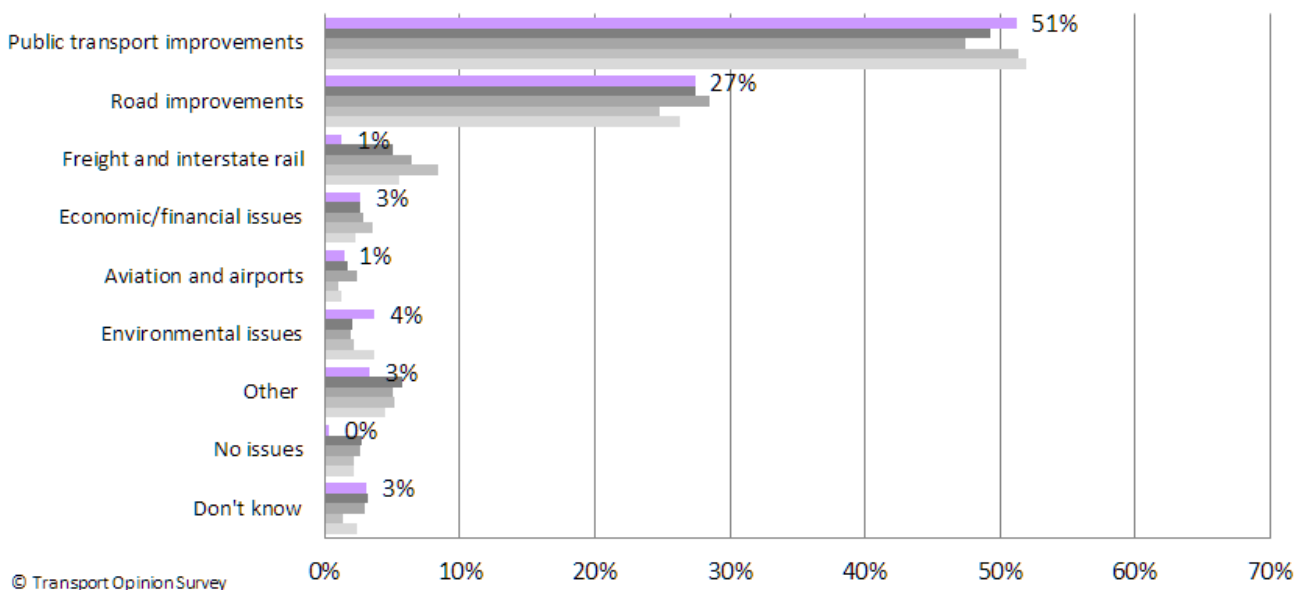


1. Highest priority issue for transport

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

- In the September 2012 quarter, over half of Australians (51%) 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 nine quarters of the survey. Over a quarter of Australians (27%) nominated road improvements.

Highest priority transport issue in Australia, Jun 2011-Sep 2012

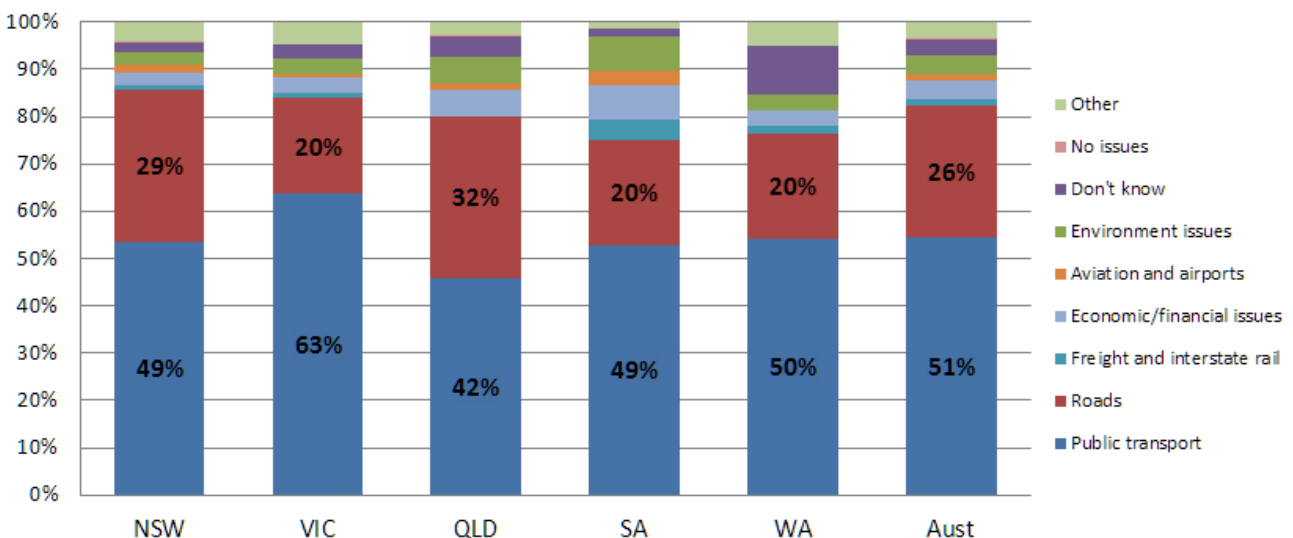


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Note: Responses sum to 100%. September 2012 results are the top bar with %value, and previous four quarter results (June 2011, September 2011, December 2011, and March 2012) are the lower bars in grey. Responses were grouped into the above categories. "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.

- All states regard public transport improvements as the highest priority issue in transport, especially in Victoria (63%).

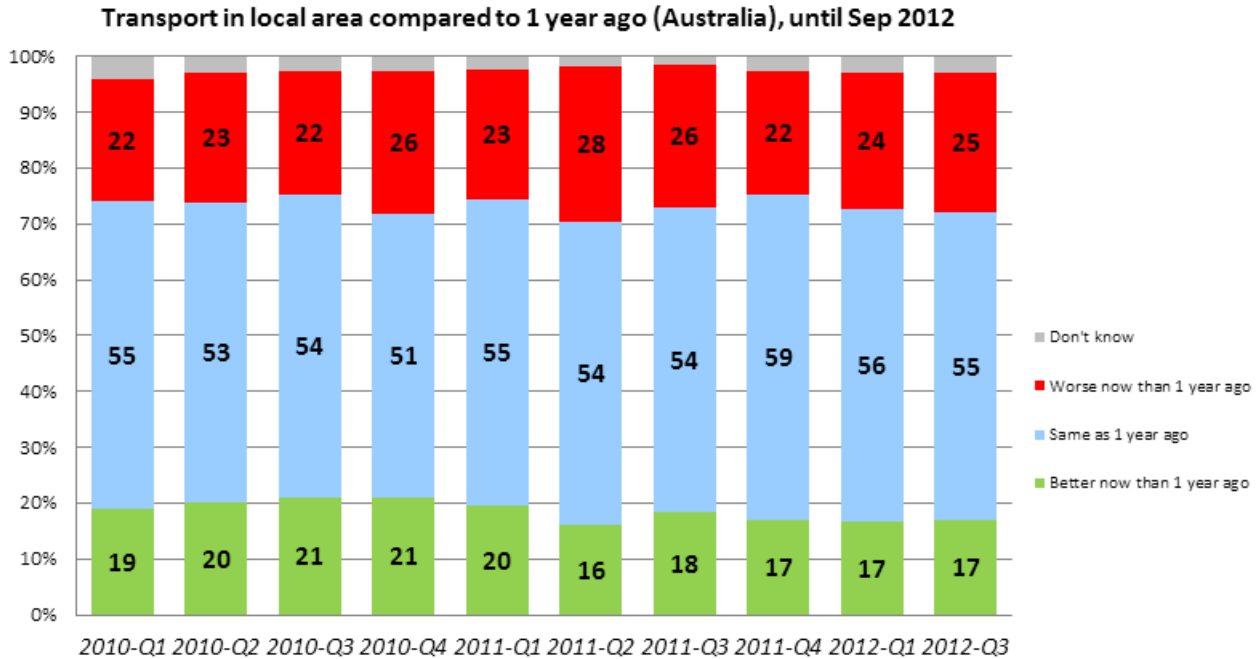
Highest priority transport issue by state, Sep 2012



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?

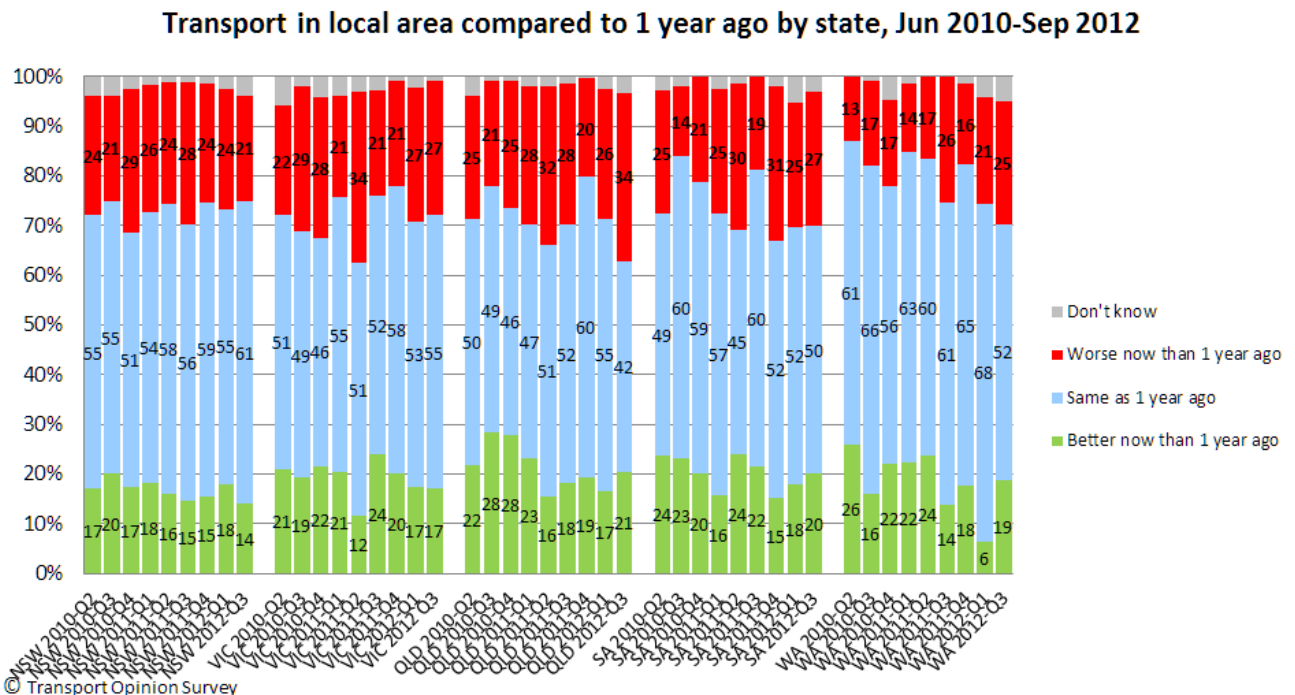
- In the September 2012 quarter, 55% of Australians said that transport in their local areas is the same now as one year ago.



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Note: Values are given as percentages (e.g., 22 denotes 22%), and responses sum to 100%. The same applies all the following figures.

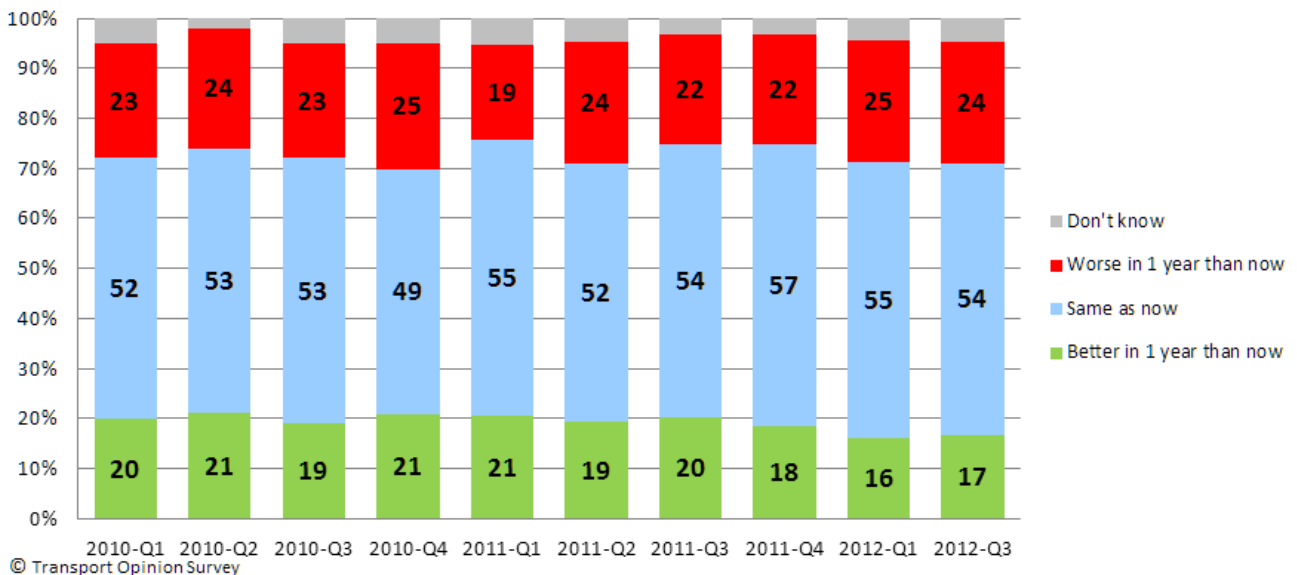
- In the September 2012 quarter, 24% of Queensland residents said that transport in their local areas is worse now than one year ago, higher than other states (21%-27%).



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?

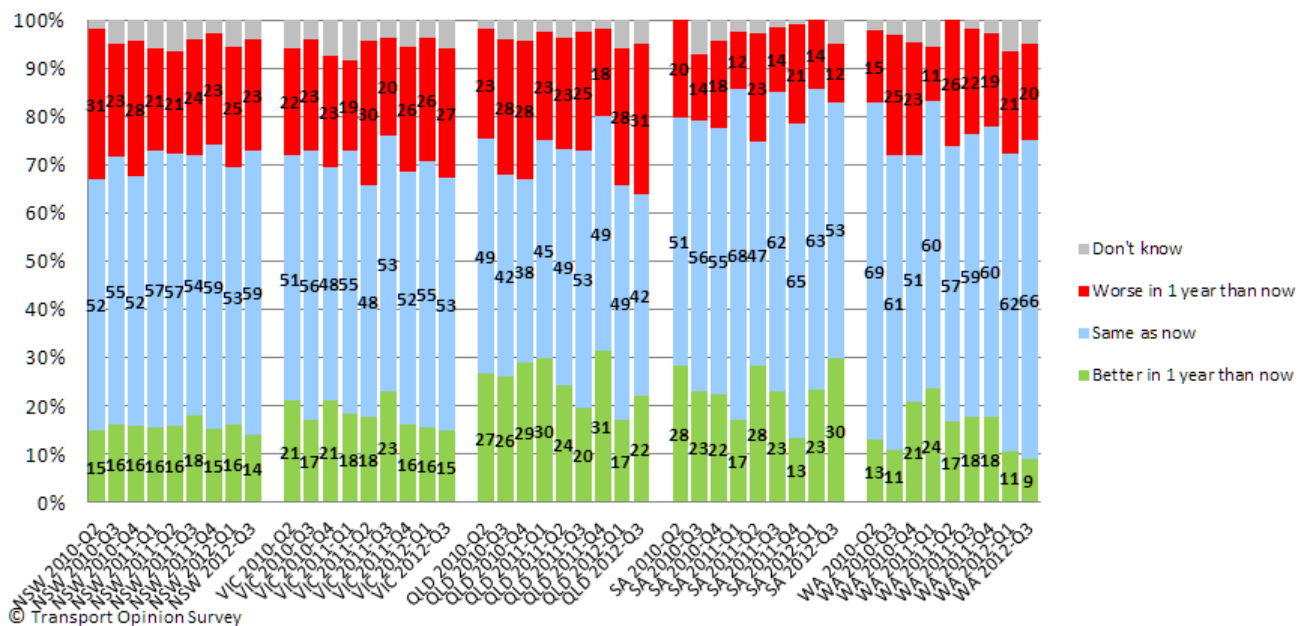
- In the September 2012 quarter, 54% of Australians said that transport in their local areas will be the same in one year's time. Only 17% said transport will be better.

Transport in local area in 1 year (Australia), until Sep 2012



- 30% of South Australia residents believed that transport in their local areas will be better in one year; while only 9% of West Australian believed that transport in their local areas will be better in one year.

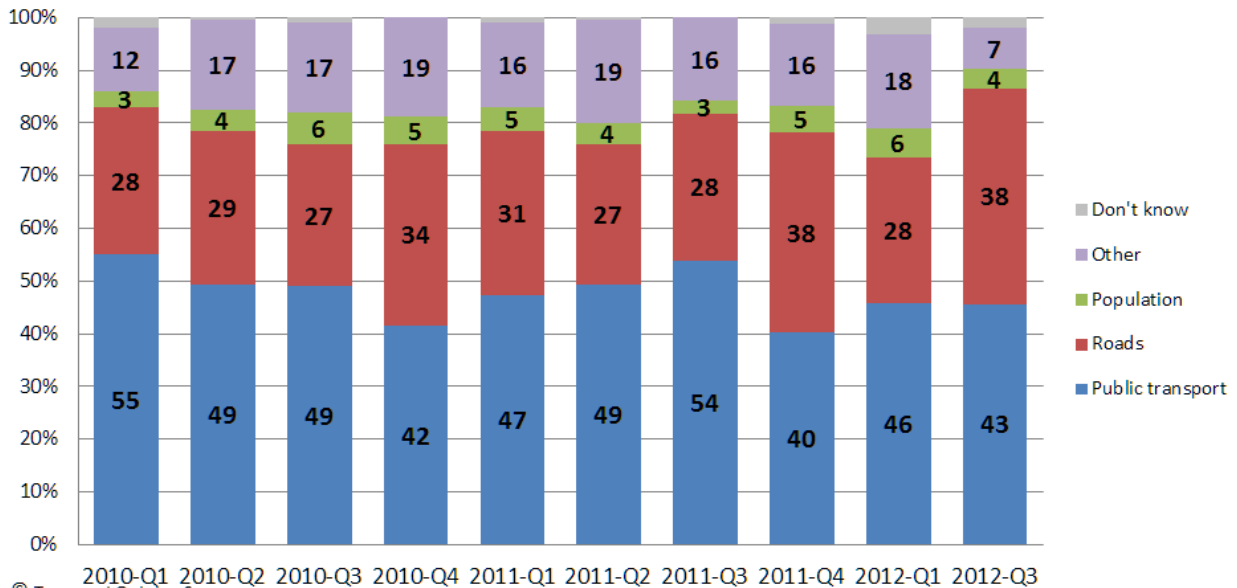
Transport in local area in 1 year by state, Jun 2010-Sep 2012



What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the September 2012 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 (43%) and roads (38%) as two major reasons. "Other" includes 7% 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 2012

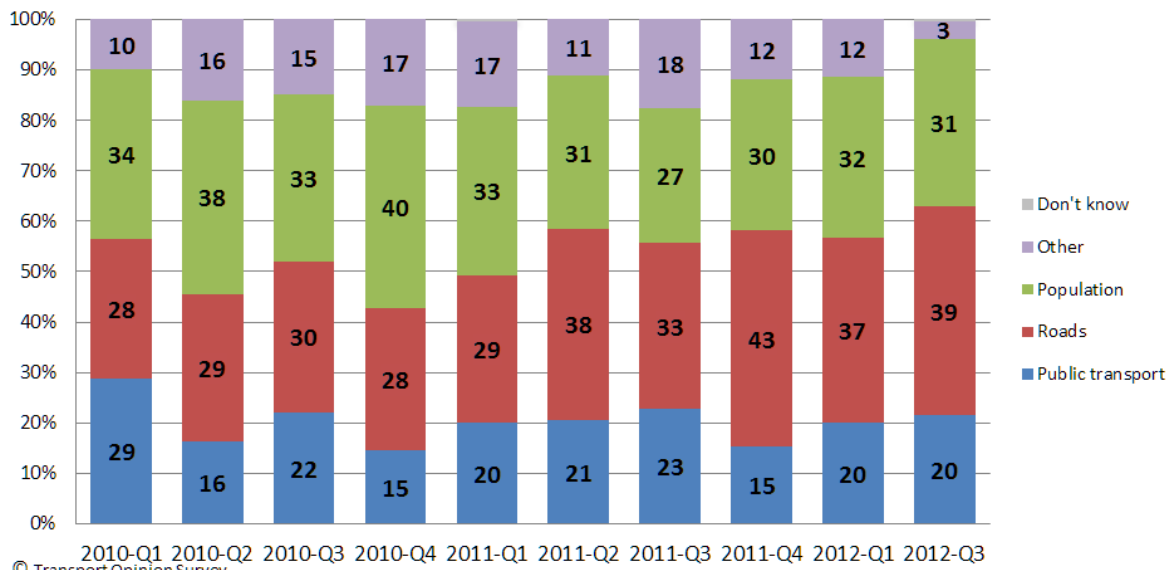


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Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

- In the September 2012 quarter, the 24% of Australians who said that transport in their local areas will be **worse** in one year were thinking about roads (39%) and population-related changes (31%) as two major reasons. "Other" includes 3% thinking of the government role in integration, planning and coordination.

Transport in local area - reason for being worse in 1 year, until Sep 2012



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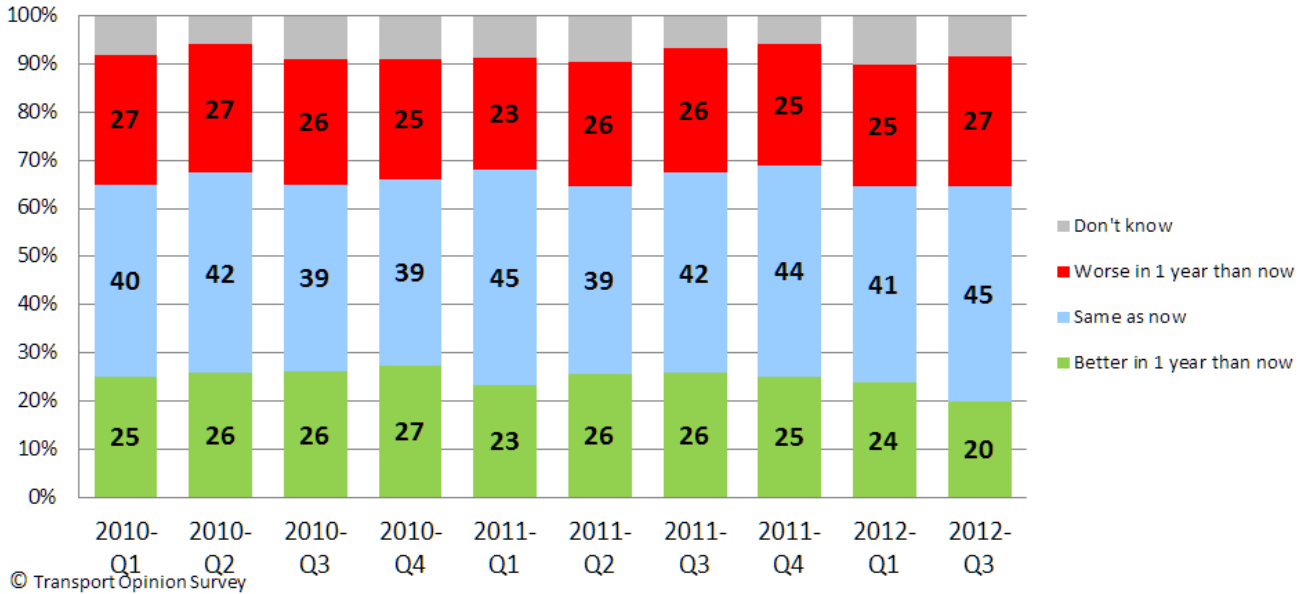
Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

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?

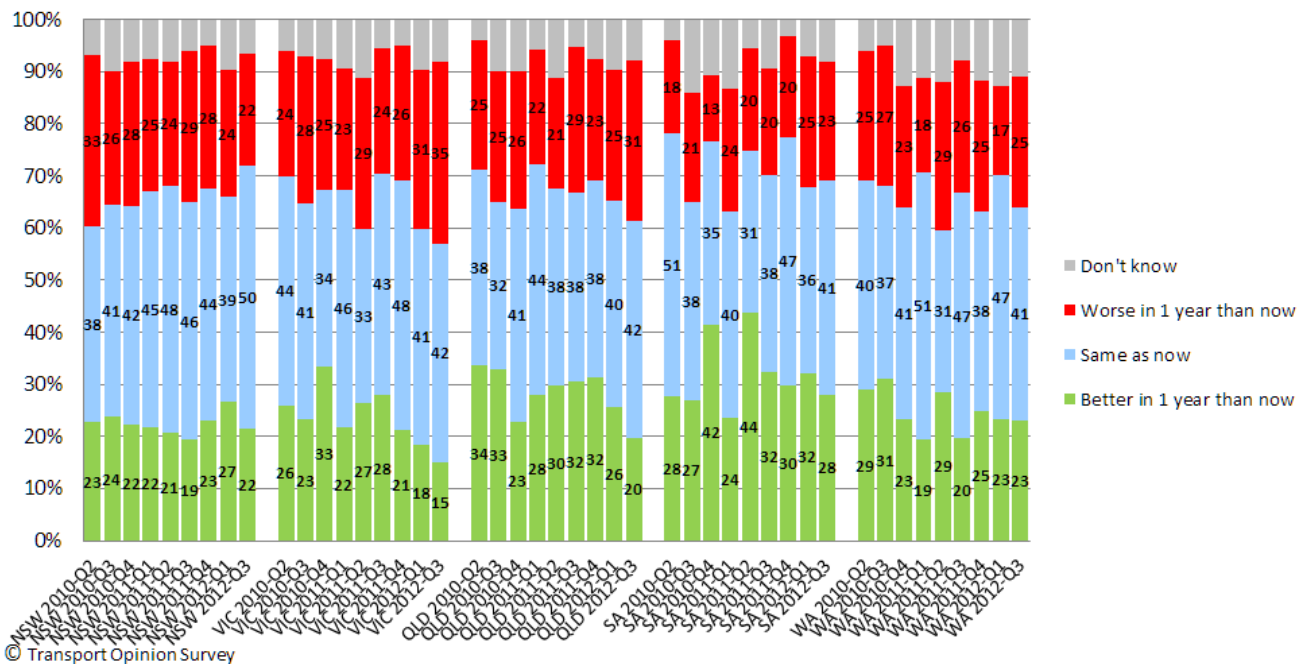
- In the September 2012 quarter, 45% of Australians said that transport in Australia in one year will be the same as now. 27% of Australians said that transport in Australia will be better in one year's time.

Transport in Australia in 1 year, until Sep 2012



- In the September 2012 quarter, 35% of Victoria residents said that transport in Australia will be worse in one year, and 15% said that it will be better. Other states are relatively more confident.

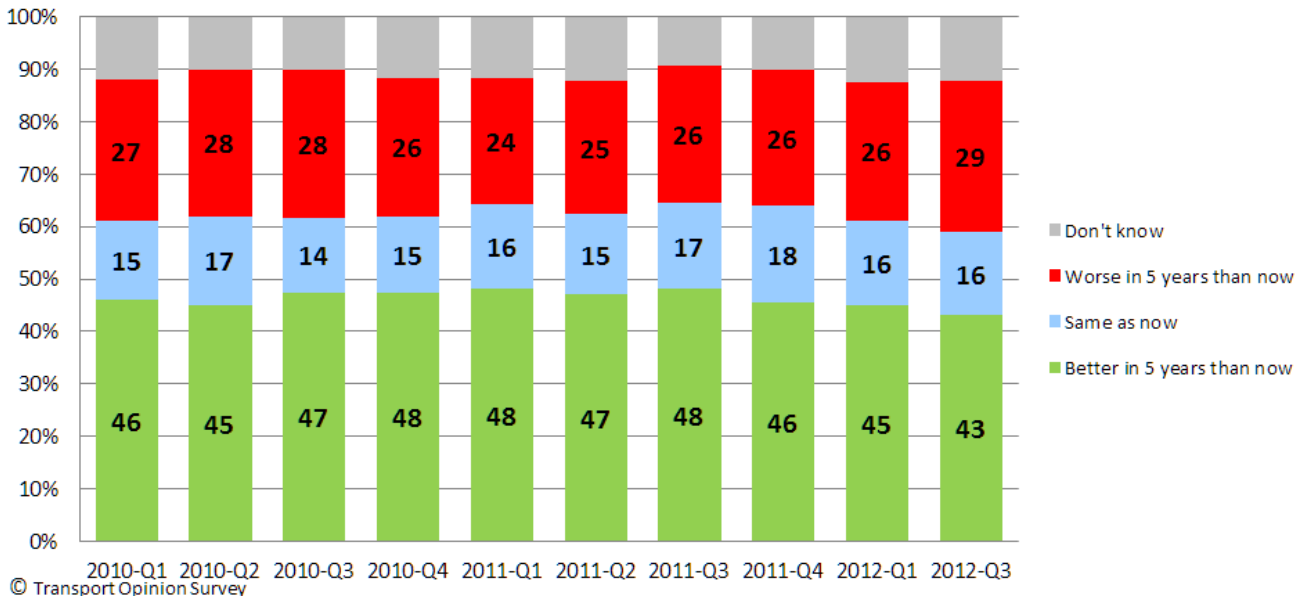
Transport in Australia in 1 year by state, Jun 2010- Sep 2012



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?

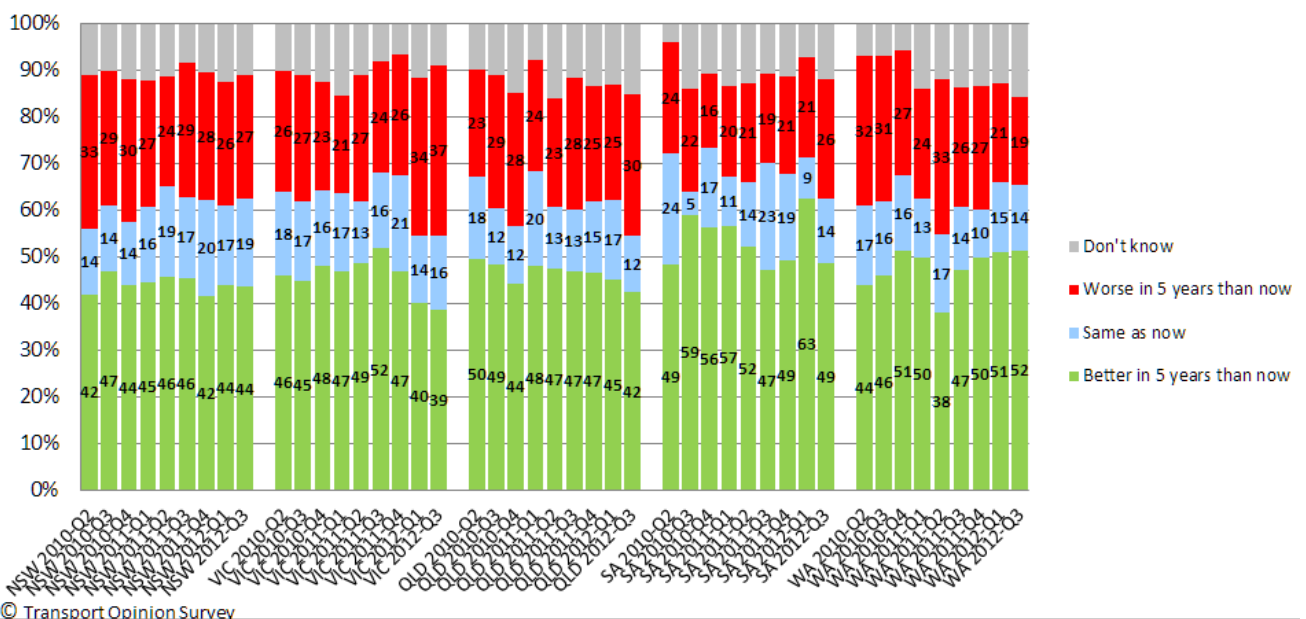
- In the September 2012 quarter, Australians remained more confident that transport will be better in five years than in one year, with 43% thinking transport in Australia will be better in five years.

Transport in Australia in 5 years, until Mar 2012



- In the September 2012 quarter, 52% of West 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 37% said it will be worse.

Transport in Australia in 5 years by state, Jun 2012-Sep 2012



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.

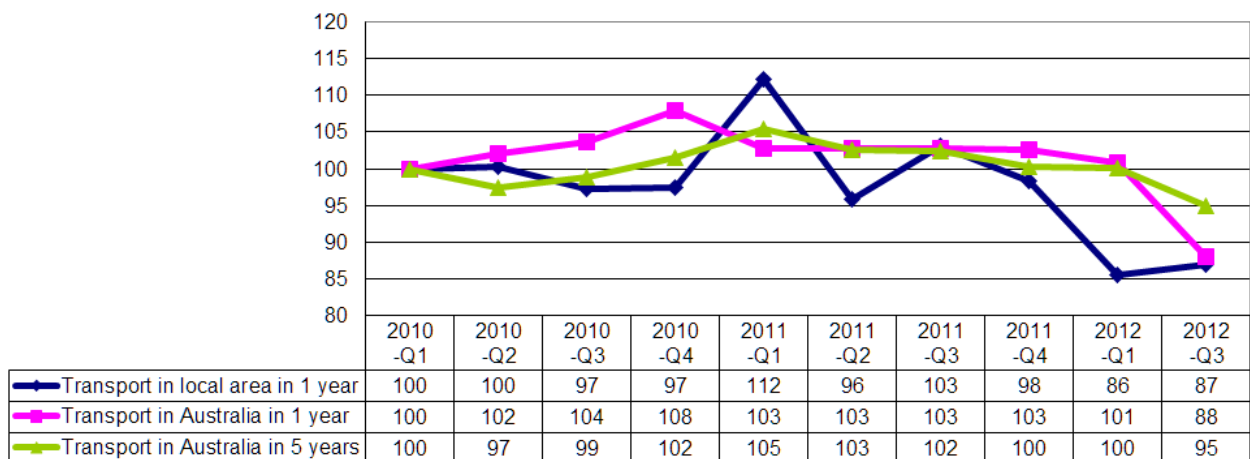
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger than in March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2012 quarter compared to the March 2012 quarter:

- Australians became slightly more confident about transport in their local area in one year's time
- Australians became significantly less confident about transport in Australia in one year's time
- Australians became less confident about transport in Australia in five years time.

Compared to the launch of TOPS in March 2010, Australians are much less confident about transport in their local areas in September 2012 (Confidence index: from 100 to 87), much less confident about transport in Australia in one year (Confidence index: from 100 to 88), and less confident about transport in Australia in five years (Confidence index: from 100 to 95).

ITLS TOPS Index of Transport Confidence



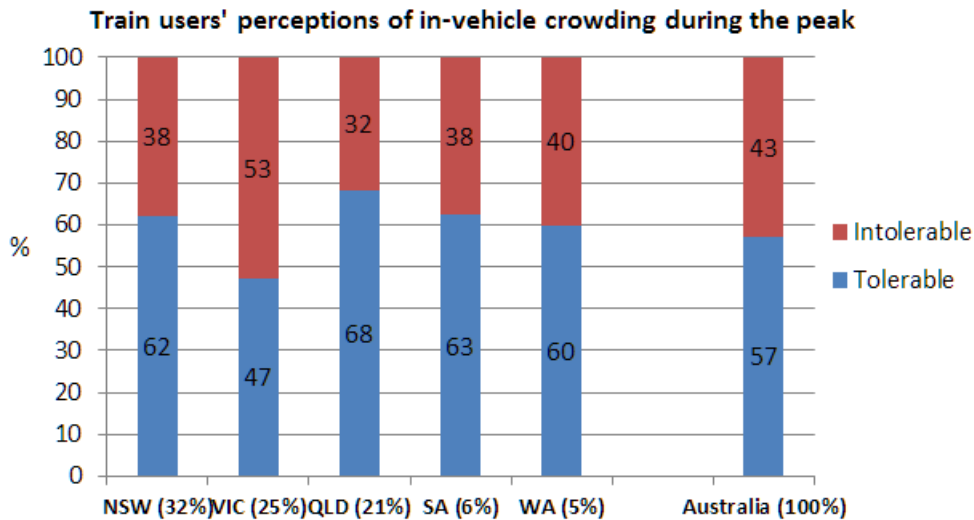
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5. Train Crowding

In the September 2012 quarter, a new question was asked about train crowding.

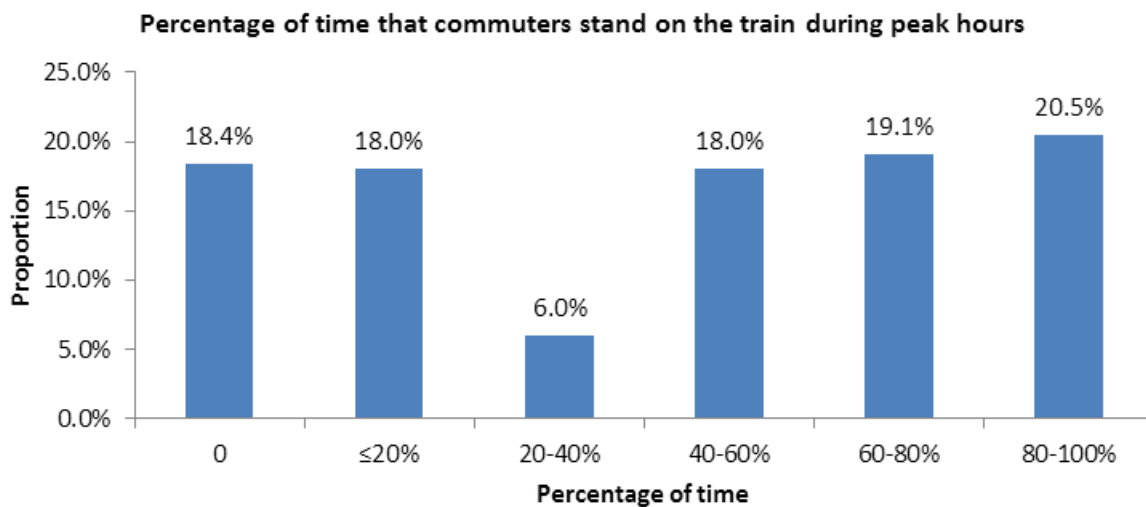
*Now a question on crowding perception of train users. How would you describe the level of crowding on your local train services in the peak hours: tolerable, or intolerable? And, what percentage of the time on the train **during peak times** do you typically have to stand ___%?*

- Overall, 43% of Australian rail users said that crowding on train services is intolerable.
- 53% of rail users in Victoria said that crowding on train services is intolerable, which is the worst amongst all states; while 68% of Queensland rail users said that crowding on train services is tolerable.



Note: The % in brackets below X-axis for each category indicates the % of respondents in that category of state.

- 20.5% train users reported that they spent 80%-100% of time standing on the train when travelling during peak hours.

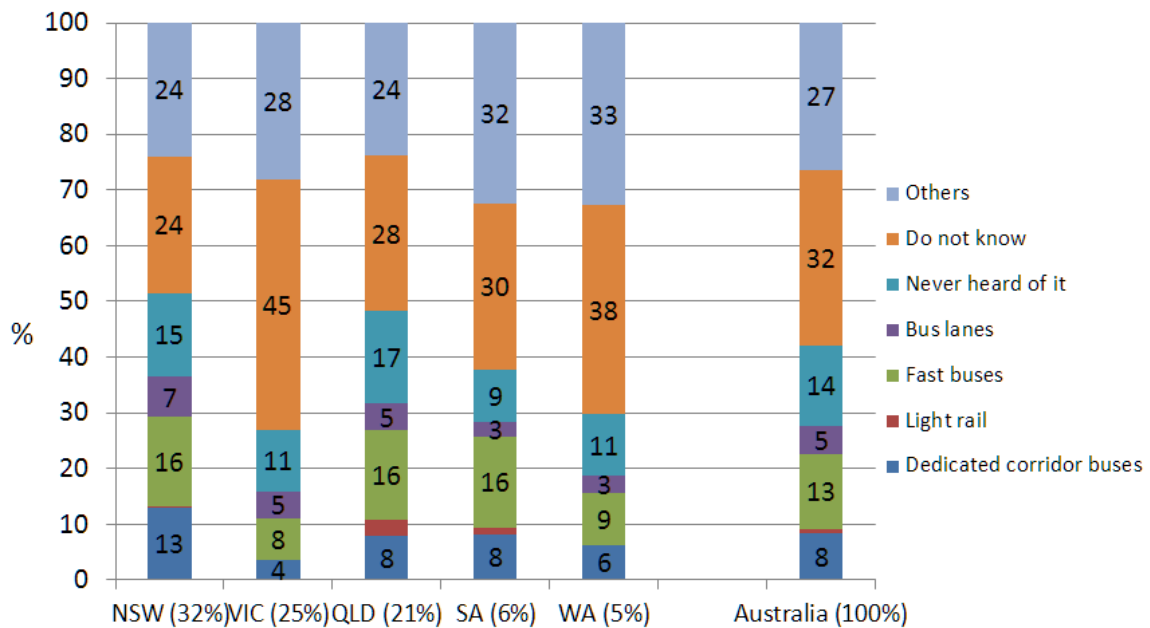


6. Bus Rapid Transit

In the September 2012 quarter, a second new question was asked:

Could you describe what you think Bus Rapid Transit is?

- Bus Rapid Transit (BRT) involves buses on dedicated corridors. However, only 8% of Australians correctly described BRT as 'dedicated corridor buses' or a similar phrase.
- 14% of Australians said 'never heard of it', and 32% did not know what it is.
- 13% of NSW residents described BRT as 'dedicated corridor buses', better than other states. What is surprising is that Queensland which has a very successful Busway network in Brisbane appears less informed than NSW and Vic.



Note: The % in brackets below the X-axis for each category indicates the % of respondents in that category for the State.

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
- June 2011: 13-30 May 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

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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