

Monitoring community views on transport confidence over time: the quarterly Transport Opinion Survey (TOPS)

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Abstract

Consumer confidence and sentiment studies have an important role in forecasting and planning economic activity, with well-established regular surveys about community confidence and the economy. The paper reports results from the first six quarters of the Institute of Transport and Logistics Studies–Interfleet Transport Opinion Survey (TOPS), a quarterly survey of 1,000 Australians that monitors changes in the community's transport opinions, transport confidence, and sentiment over time. Key indicators include transport as a national priority, the highest priority issue in transport, transport in the local area getting better or worse, transport in Australia getting better or worse, government responsibility for transport, and private sector involvement in public transport. Based on responses on whether transport will be better or worse in the future, the TOPS index of transport confidence is reported. The paper analyses how consumer confidence towards transport getting better or worse changes over time, and varies by location and demographic characteristics.

1. Introduction

Consumer and business confidence and sentiment studies have an important role in forecasting and planning economic activity. While there are well-established regular surveys of community confidence and the economy, there have been no regular ongoing surveys on transport issues to monitor changes in the community's transport opinions, confidence and sentiment over time in Australia and indeed worldwide. The Institute of Transport and Logistics Studies (ITLS)–Interfleet Transport Opinion Survey (TOPS) is a quarterly survey of 1,000 Australians initiated in March 2010 to monitor community sentiment towards transport over time. It focuses on the highest priority issue in transport, confidence about transport in the local area, reasons for confidence, confidence about transport in Australia in one year and five years' time, views on government responsibility for transport, and private sector involvement in public transport.

The paper describes the Transport Opinion Survey and how it monitors community views on transport confidence over time. The paper is structured as follows: section 2 reviews surveys of consumer confidence and sentiment, section 3 describes the methodology for TOPS, section 4 presents results on transport confidence from the first six quarters of data, section 5 reviews the TOPS index of consumer confidence, section 6 reports views on other transport issues, and section 7 provides conclusions and future directions.

2. Background

2.1 Consumer and business confidence and sentiment

Regular surveys or data releases which are indicators of consumer or business confidence or sentiment, and thus the possible future direction of the economy, receive extensive media attention. Reasons and benefits for measuring consumer confidence and sentiment over time include impacts on purchasing decisions, employment, capital investment and official interest rate adjustments.

In Australia, there are several examples of regular confidence surveys or data releases on economic activity. The best known survey of consumer confidence is the monthly Westpac–Melbourne Institute Consumer Sentiment Index (Westpac-MI 2011). Surveys of business confidence include the NAB Quarterly Business Survey and Forecasts (NAB 2011), the quarterly Tourism and Transport Forum–Mastercard Tourism Industry Sentiment Survey (TTF 2011), the quarterly Sensis Business Index–Small and Medium Enterprises (Sensis 2011), the monthly Australian Industry Group–PriceWaterhouseCoopers Performance of Manufacturing Index (AIG-PWC 2011), the quarterly Rabobank Rural Confidence Survey (Rabobank 2011), and the quarterly Global Proxy–Melbourne Institute Shareholder Confidence Index (Melbourne Institute 2011). Apart from Australian Bureau of Statistics indicators, the monthly ANZ Job Advertisements Series is a regular release of an indicator of economic activity (ANZ 2011).

An indicator of transport-related activity, designed as a measure of economic activity, is the US Bureau of Transportation Statistics' Transportation Services Index. It is comprised of a passenger index, a freight index and a combined index. Young et al. (2007) report how the index is related to economic activity.

2.2 Community views on transport

There are many one-off surveys of community views about transport. In Australia, recent one-off surveys of community views on transport include the Rail, Tram and Bus Union's Ultimate Transport Survey (RTBU 2010), the NRMA pre-federal election survey in marginal electorates (NRMA 2010), the Property Council of Australia survey on the liveability of capital cities including transport (Property Council 2011), and the IBM Commuter Pain Survey (IBM 2011). *The Sydney Morning Herald's* Independent Inquiry for a Long Term Transport Plan for Sydney included a community survey on the specific issue of funding transport (Independent Inquiry 2010).

Longitudinal data of views on transport is much less common. Transport may be included in surveys about national priorities or concerns or issues, but transport is rarely the main focus. In the UK, the Department of Transport conducted five waves of the Omnibus survey into use of, and attitudes towards, public transport in the UK from November 2002 to March 2005 (BMRB 2005). Topics included information (whether the respondent had seen any information about public transport recently and whether they had heard anything about the government's transport plans), use of public transport, problems and improvement, the state of transport now and in the future (whether they had seen any improvements in transport in their area over the last year and whether the public are optimistic or pessimistic about the future state of transport in the country), and overall satisfaction. A panel of four waves was implemented before and after the Sydney Olympics to identify travel intentions prior to the Olympics and subsequent action during and after the Olympics (Hensher and Brewer 2002).

In Sydney, the repeated cross-section Household Travel Survey, although designed primarily to collect data on travel behaviour over one day, has included questions about users' satisfaction with public transport for reliability, frequency, safety and comfort since 2005/06, and 5 years of data is available (Transport Data Centre 2010). In Sydney, there have also been two annual surveys of metropolitan bus users' and rail users' satisfaction with services in 2009 and 2010 (Independent Transport Safety Regulator 2011). In Victoria, there are monthly

customer satisfaction surveys of users and non-users of public transport which are compiled into quarterly Customer Satisfaction Indices (Victoria Department of Transport 2011).

Murray et al. (2009) reported a survey of attitudes to public transport in New Zealand at two points in time, based on a panel survey of 159 youths in 2007 and 2008, and a cross-sectional survey of over 500 drivers in 2007 and 2009.

3. Method

The ITLS-Interfleet Transport Opinion Survey (TOPS) has been designed to monitor community sentiment towards transport on a regular basis across Australia. TOPS is funded by the Institute of Transport and Logistics Studies and Interfleet Technology. The key topic areas include transport as a national priority, the highest priority transport issue in transport, and changes in transport in the local area and in Australia. Demographic information on age, sex, labour force status, location and public transport use is also collected. Most questions are close-ended. There are two open-ended questions in which responses are recorded verbatim and coded after the interview.

TOPS is a quarterly telephone survey of 1,000 Australians, aged 18 years or over, representative of all Australian states and capital city/non-capital city locations. There are location, age and sex quotas to ensure a representative geographical and socio-demographic sample. The eight location quotas are Sydney, rest of NSW, Melbourne, rest of Victoria, Brisbane, rest of Queensland, other capital cities, and rest of country. Households are selected from a database of valid subscriber phone numbers kept up-to-date by testing using a probe signal to the exchange to confirm whether the number is currently connected. Of the in-quota respondents who answered the phone, the average response rate for completing the survey across the six quarters is 31%, varying from 23% to 44% per quarter. While a larger sample would reduce sampling error, the sample size reflects a trade-off with the costs of a quarterly survey. The computer aided telephone interview is conducted by Taverner Research, a member of the Association of Market and Social Research Organisations and accredited to ISO 20252 (International Market Research Quality Assurance). TOPS is approved by the University of Sydney Human Research Ethics Committee as Protocol No. 12284.

To avoid attracting only respondents interested in transport and to avoid biasing responses about the importance of current issues, the opening words of the phone call do not mention transport: the client is identified as the University of Sydney rather than the Institute of Transport and Logistics Studies, and the survey is described as one about community issues.

TOPS was launched in March 2010, and six quarters of data are now available. Surveys are conducted in February (quarter 1), May (quarter 2), August (quarter 3) and November (quarter 4), over two weeks. Survey dates and key issues during each survey period are reported in Appendix A. Results are released each quarter through the ITLS distribution list and are publicly available on the ITLS website and reported in the printed and electronic general and industry media.

Due to their size making up over 50% of Australia's population, results from NSW (28%) and Victoria (25%) influence the national results. Results for smaller states such as South Australia and Western Australia, with 7% each of Australia's population and respondents, can be more variable due to the small sample size.

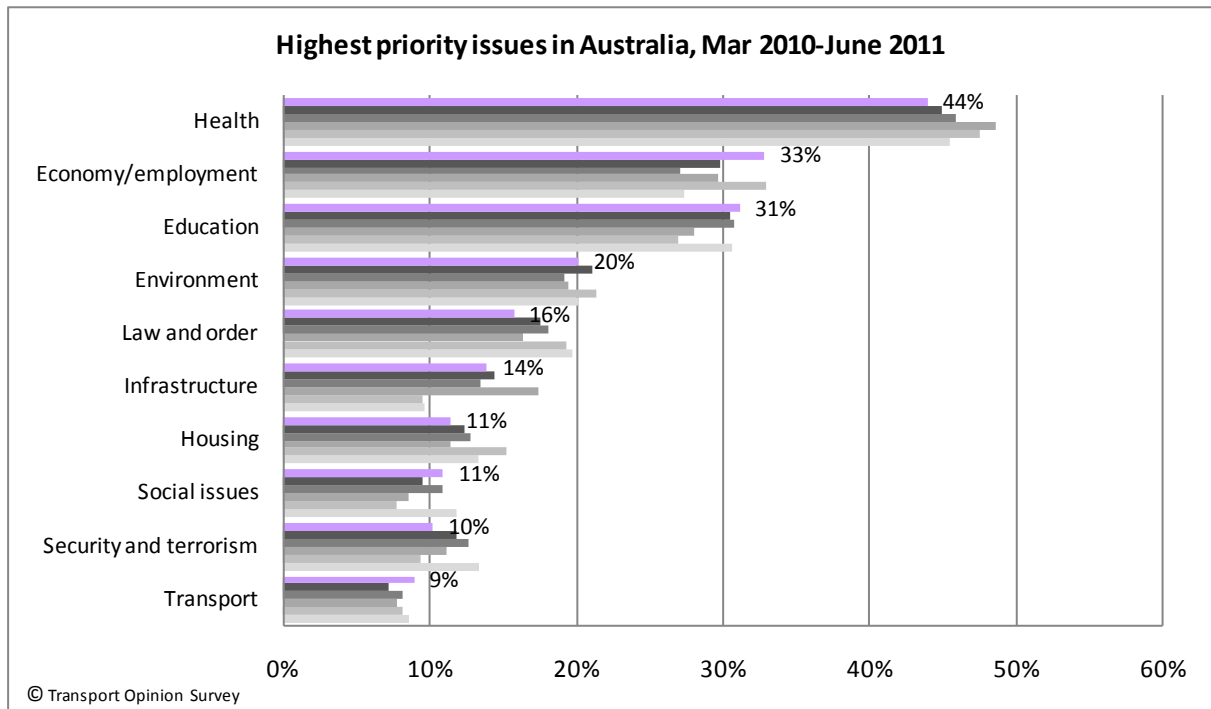
4. Community confidence on transport

This section reports results from the first six quarters of TOPS, since the launch in March 2010. Results are reported for Australia as a total which includes respondents in all states and territories, and for the five largest states. Tasmania, ACT and Northern Territory are included in the survey, but results are not reported separately due to the sample size in these very small areas.

4.1 Transport as a national priority

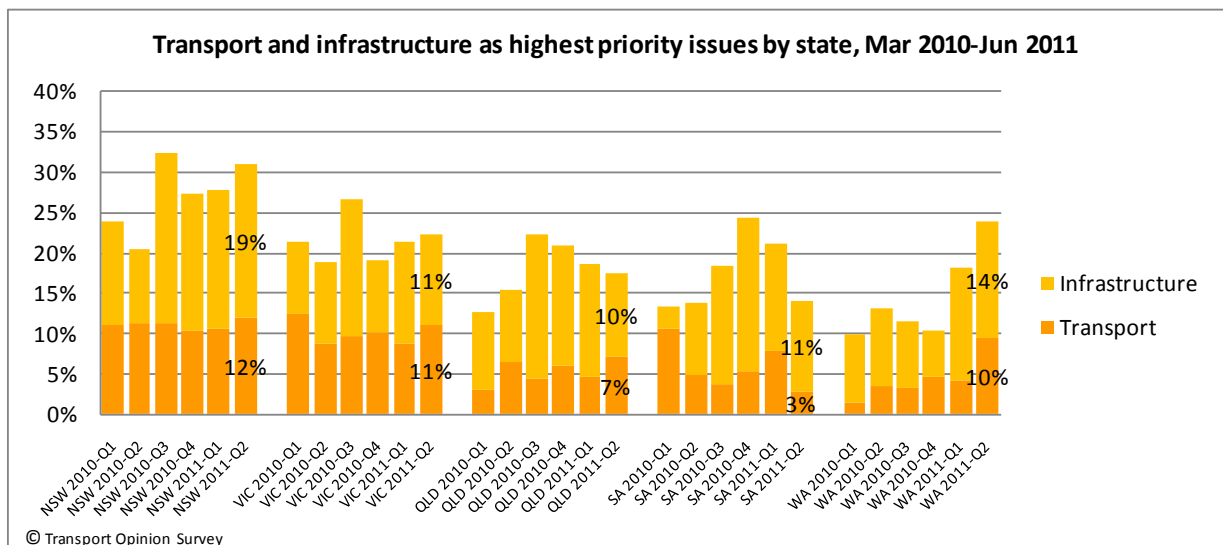
To establish transport in the context of other national priority issues, respondents are asked which two issues from a list of 11 issues presented in random order are the “highest priority” in Australia today. In every quarter, health has been nominated as one of the two highest priority issues, followed by education, and economy/employment as shown in Figure 1. Major issues in 2010 included the Federal Government’s health reform, ‘Building the Education Revolution’, and the stimulus package response to the global financial crisis. Transport is the lowest priority of the 11 issues, but its priority varies by state. Figure 2 shows that residents of NSW and Victoria rate transport as a higher priority issue than residents of other states.

Figure 1 Highest priority issues in Australia, March 2010–June 2011



Note: Responses sum to 200%. June 2011 results are top bar with % value, and previous quarter results (March, June, September and December 2010, and March 2011) are the lower bars in grey.

Figure 2 Transport and infrastructure as highest priority issues by state, March 2010–June 2011

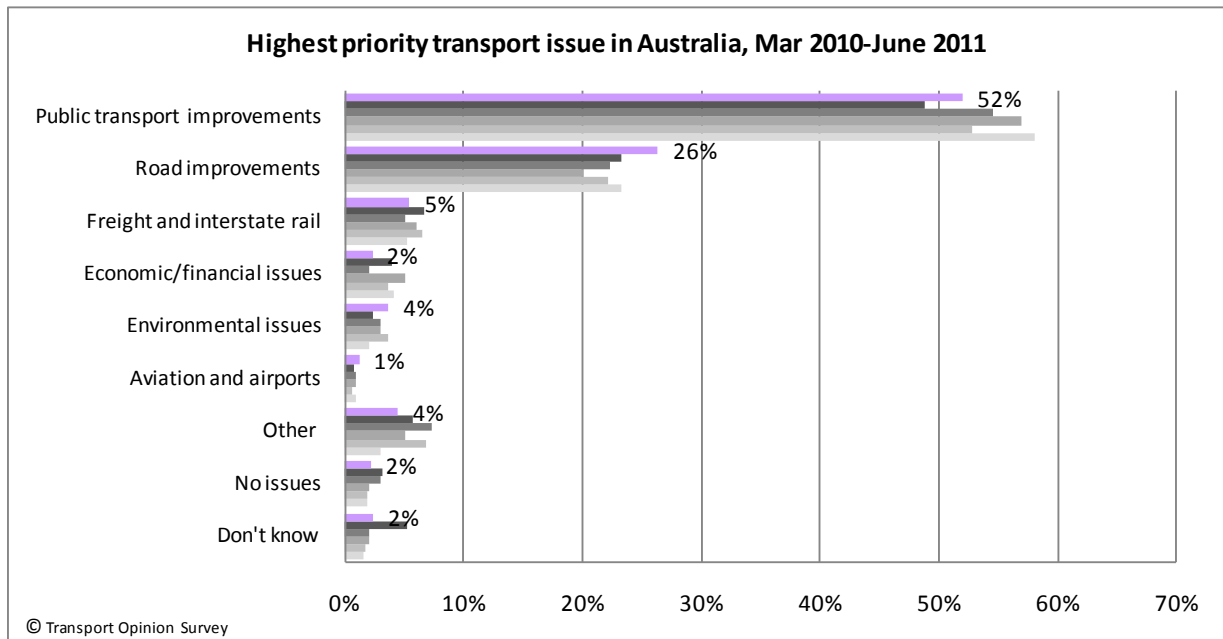


Note: Responses sum to 200%

4.2 Highest priority issue in transport

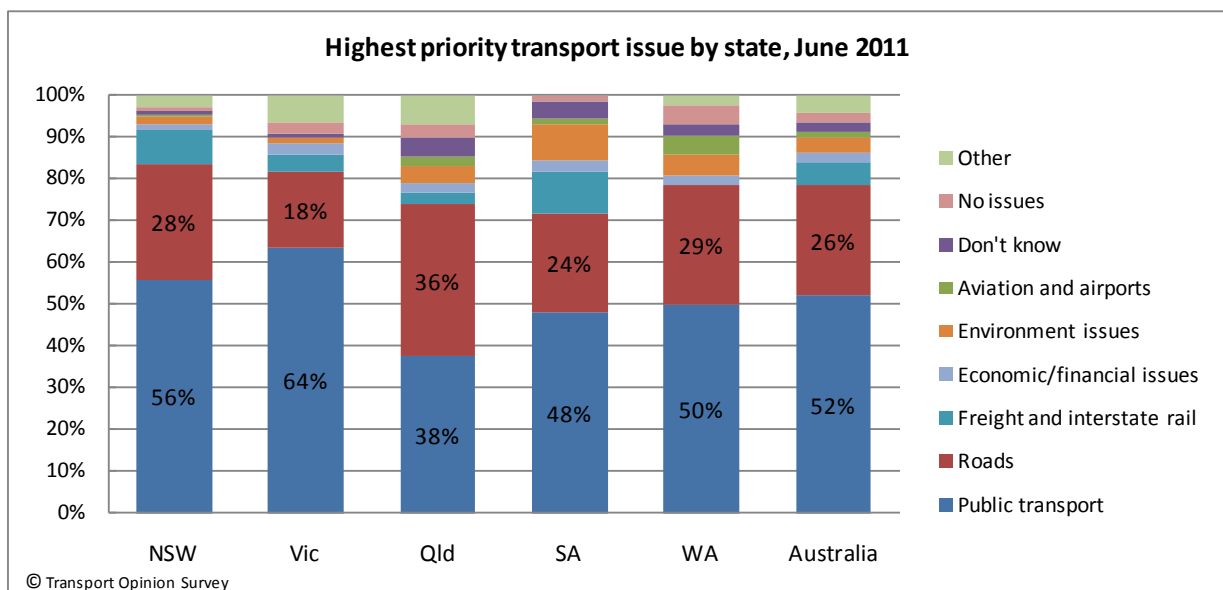
Respondents are asked what is the “highest priority issue for transport in Australia now”. This is an open-ended question with responses recorded verbatim and coded afterwards according to the focus of the response. In every quarter of TOPS, over half of Australians nominate public transport improvements as the highest priority transport issue (Figure 3). Public transport is the highest priority issue in every state with the highest support in Victoria (Figure 4). The level of support for public transport varies by public transport use and location, but even non-public transport users support public transport improvements as the highest priority transport issue (Figure 5).

Figure 3 Highest priority transport issue in Australia, March 2010-June 2011



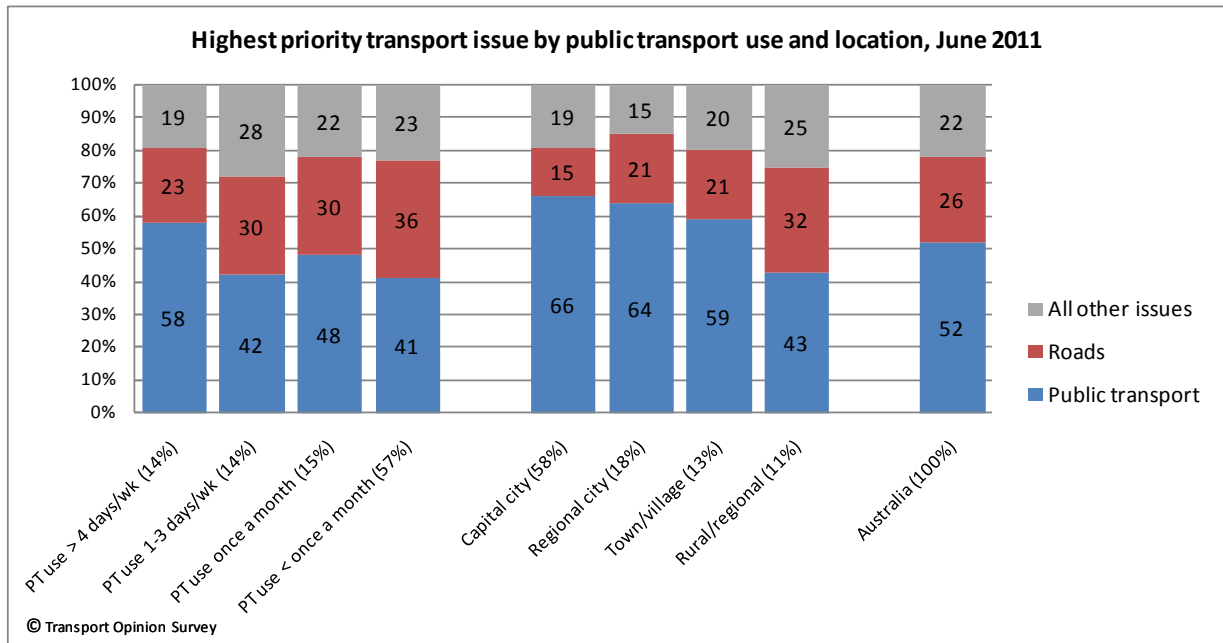
Note: Open-ended responses are grouped into the above categories. Responses sum to 100%. June 2011 results are top bar with % value, and previous quarter results (March, June, September and December 2010, and March 2011) are the lower bars in grey. “Other” includes responses about transport in general, responses about both public transport and roads, issues not included in other categories, and rebuilding transport after disasters.

Figure 4 Highest priority transport issue by state, June 2011



Note: Open-ended responses are grouped into the above categories.

Figure 5 Highest priority transport issue by public transport use and location, June 2011



Note: % in brackets for each category indicates % of respondents in that category of public transport use or home location. Location is self-reported by respondent.

4.3 Confidence about transport in local area compared to 1 year ago

Each quarter, respondents are asked “Compared to a year ago, do you think the state of transport in general in your local area is better now, the same, or worse now?”. Interviewers are trained, if required, to correct any respondent misperceptions that transport is only public transport and explain it includes passenger and freight. Across the six quarters, one in five Australians consistently say transport in their local area is better now than a year ago. About half consistently say transport is the same (Figure 6). By state, NSW residents are the least confident that transport in their local area has improved with the consistently lowest proportion of residents who said transport is better than a year ago, although Victoria suffered a marked decline in confidence in the June 2011 quarter (Figure 7).

Figure 6 Transport in local area compared to 1 year ago, March 2010-June 2011

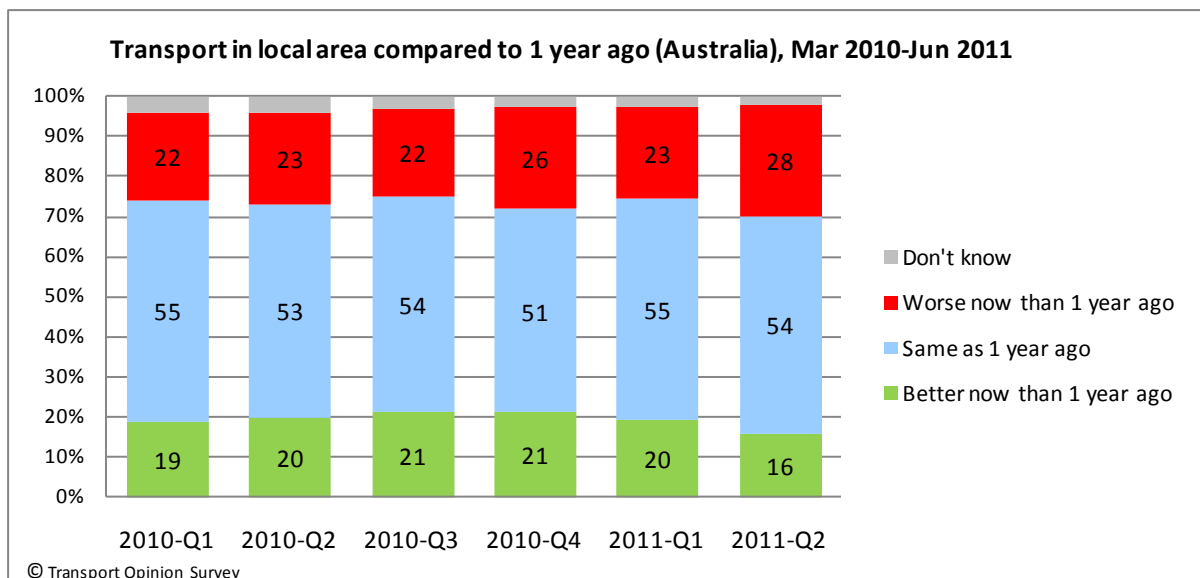
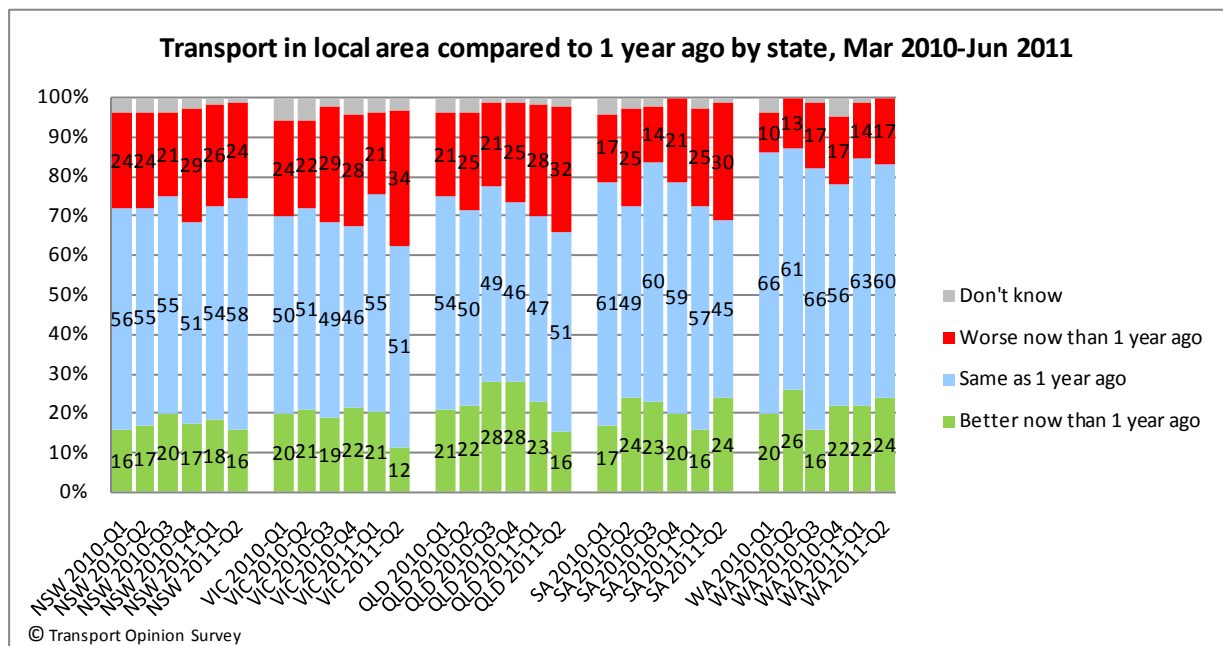


Figure 7 Transport in local area compared to 1 year ago by state, March 2010-June 2011



4.4 Confidence about transport in local area in 1 year's time

Each quarter, respondents are asked “Do you think in one 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 now?”. Over the six quarters, one in five Australians consistently say transport will be better in their local area in one year's time than now, and over half say transport will be the same (Figure 8). By state, NSW is consistently the least confident about transport in the local area in one year's time (Figure 9). In June 2011, there was a marked increase in Victorian residents saying transport will be worse in one year (30%, up from 19% in the March 2011 quarter), but no change in NSW confidence following the March 2011 state election.

Figure 8 Transport in local area in 1 year's time, March 2010-June 2011

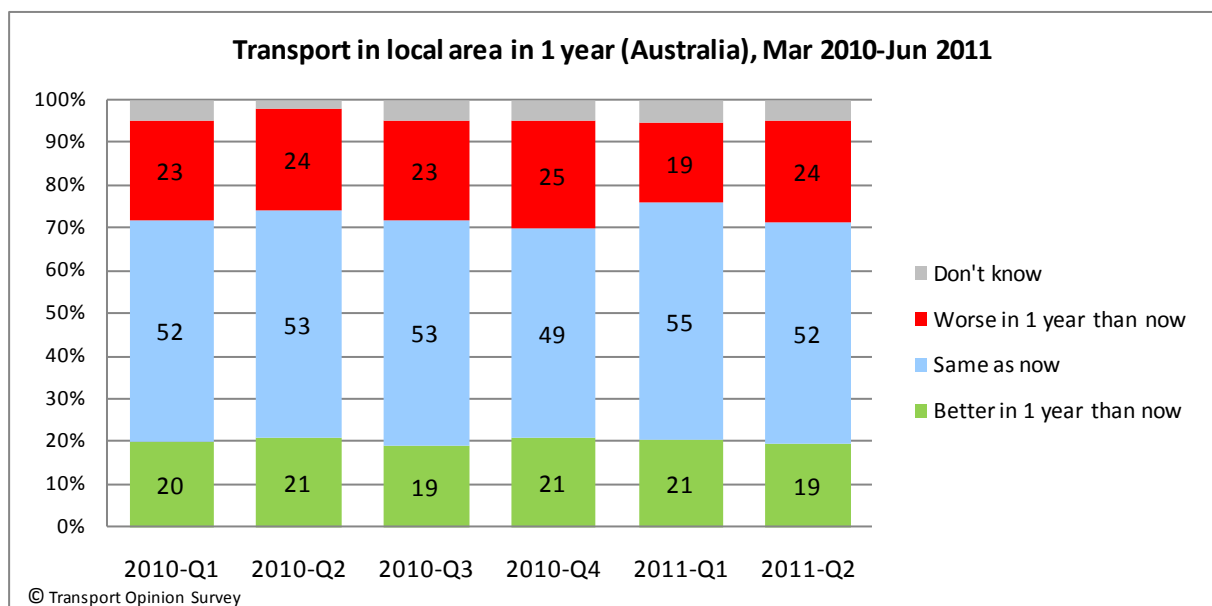
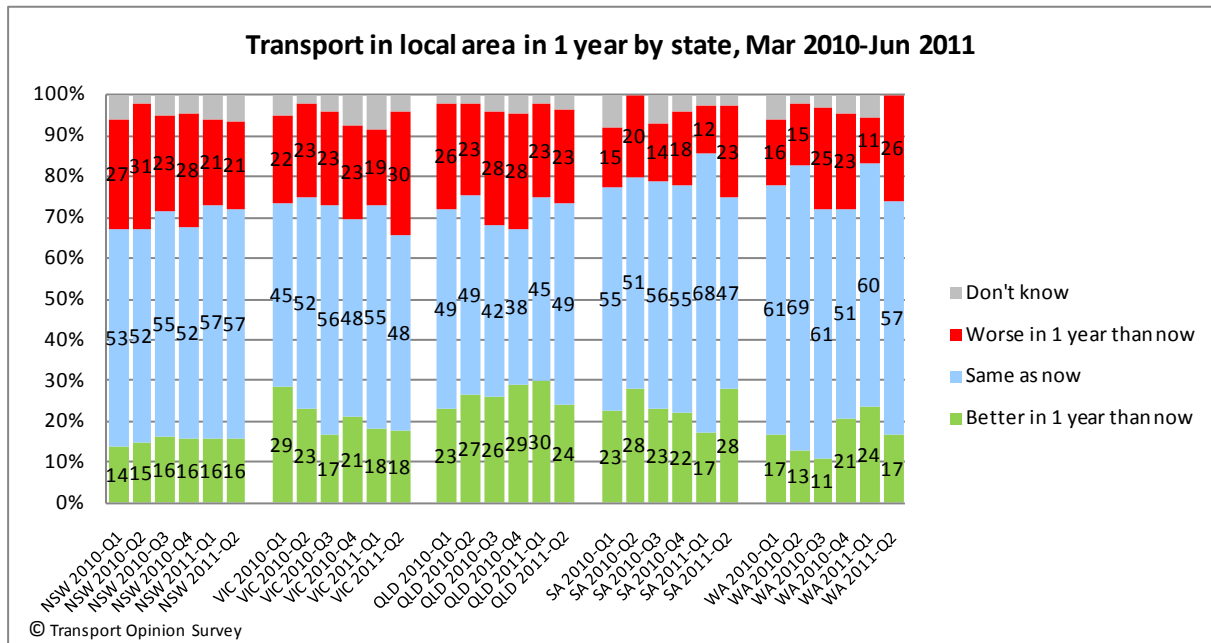


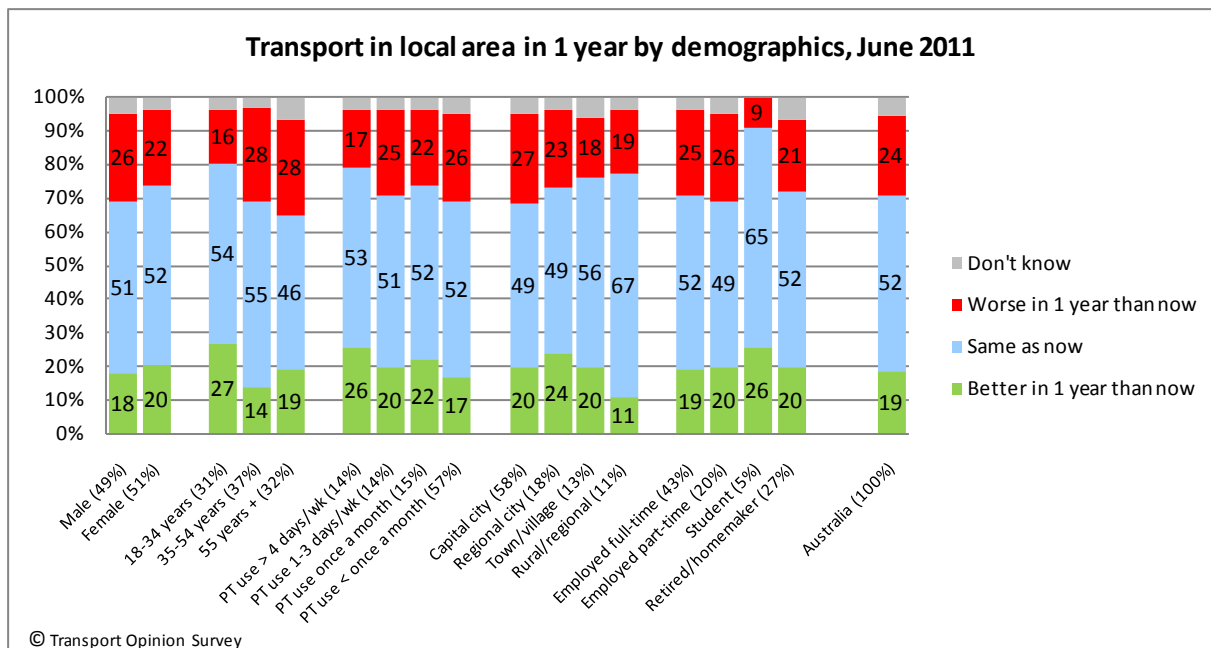
Figure 9 Transport in local area in 1 year's time by state, March 2010-June 2011



Variation by demographic characteristics

Responses to transport in the local area in one year's time are reported by demographic characteristics to see the impact of sex, age, public transport use, home location, and work force status on degree of confidence about transport. Figure 10 shows that, compared to the Australia average in the June 2011 quarter, younger people (18-34 years) and students are more confident transport will get better, the most frequent public transport users are more confident transport will get better, and rural and regional residents are less confident transport will get better. Students are the most confident of any demographic segment, with only 9% saying transport in their local area will be worse in one year's time.

Figure 10 Transport in local area in 1 year's time by demographic characteristics, June 2011



Note: % in brackets for each category indicates % of respondents in that demographic category. Location is self-reported by respondent.

4.5 Reasons for transport getting better or worse

Respondents who say transport in their local area will be better or worse in one year's time are asked what they were thinking of when they answered that question. Open-ended responses are coded into categories. The one in five Australians thinking transport will be better tend to be thinking of public transport more than roads, indicating that public transport initiatives underway such as new rail lines, bus Transitways, light rail, commuter car parks, train station upgrades or service changes are being recognised (Figure 11). In contrast, the respondents who say transport will be worse in one year tend to be thinking about population-related changes in which transport does not keep up with population growth, as well as roads and public transport (Figure 12).

Figure 11 Transport in local area—reason for being better in 1 year's time, March 2010-June 2011

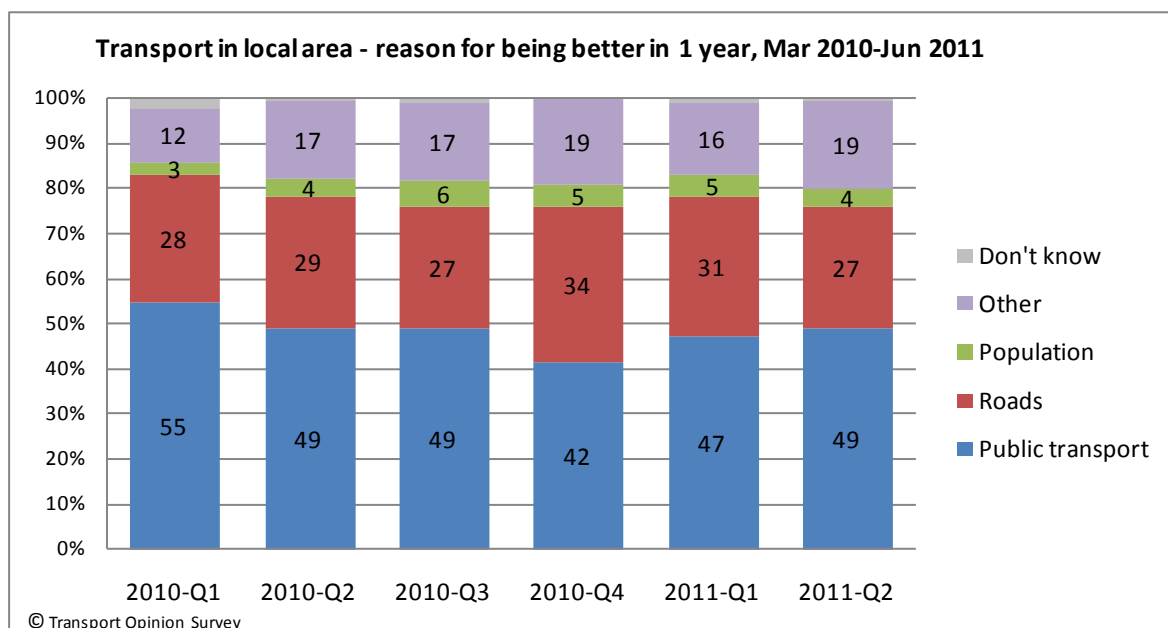
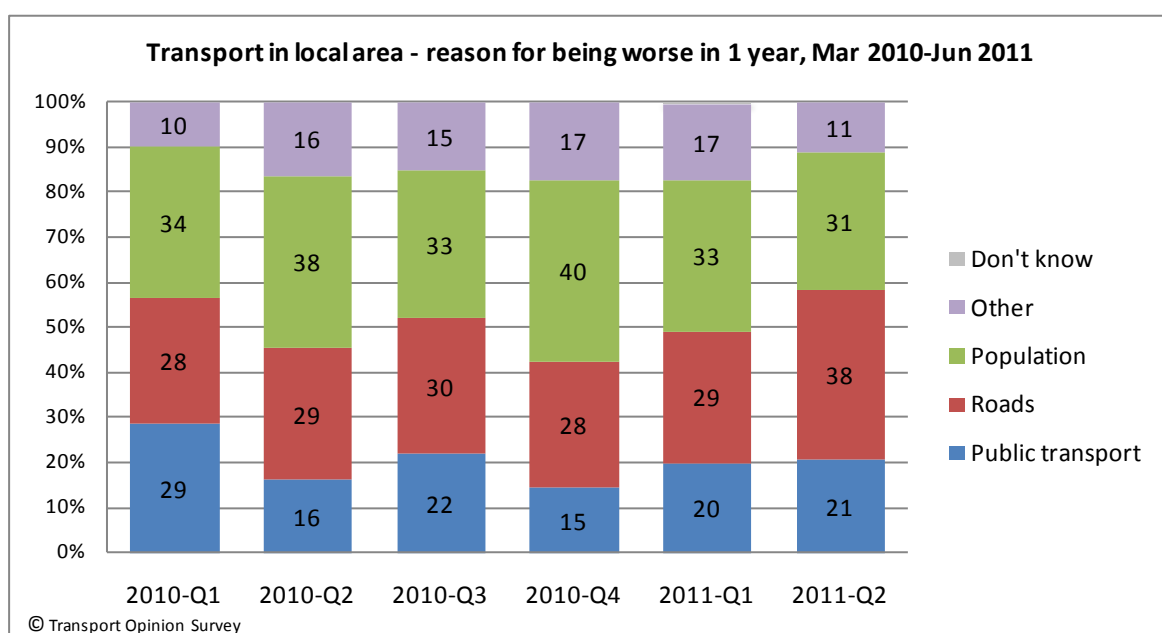


Figure 12 Transport in local area—reason for being worse in 1 year's time, March 2010-June 2011



Note: Open-ended responses are 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 such as government role in integration, planning and coordination.

4.6 Confidence about transport in Australia in 1 year's time

Respondents are also asked about transport 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?". Over the six quarters, about a quarter of Australians consistently think transport will be better and a quarter think it will be worse (Figure 13). There is a higher degree of "don't know" than for transport in the local area. The federal election in August 2010 and the formation of the Gillard Labor government does not appear to have influenced Australians' confidence about transport in one year's time. Since the survey began in March 2010, NSW has become more confident each quarter with a decline in respondents saying transport in Australia will be worse in one year (Figure 14).

Figure 13 Transport in Australia in 1 year's time, March 2010-June 2011

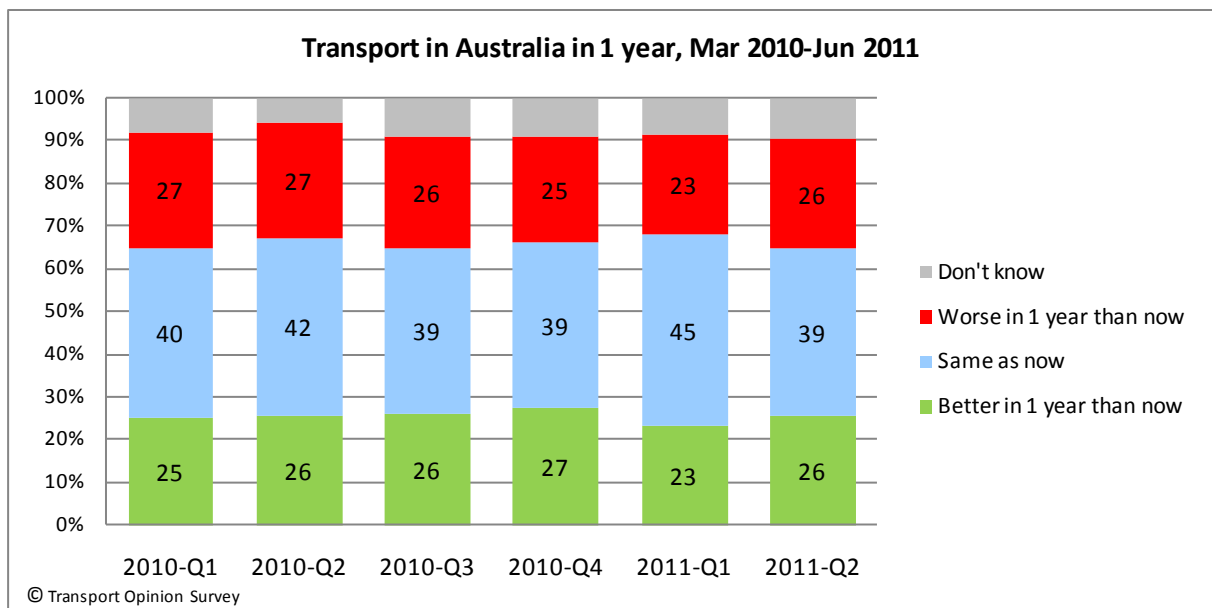
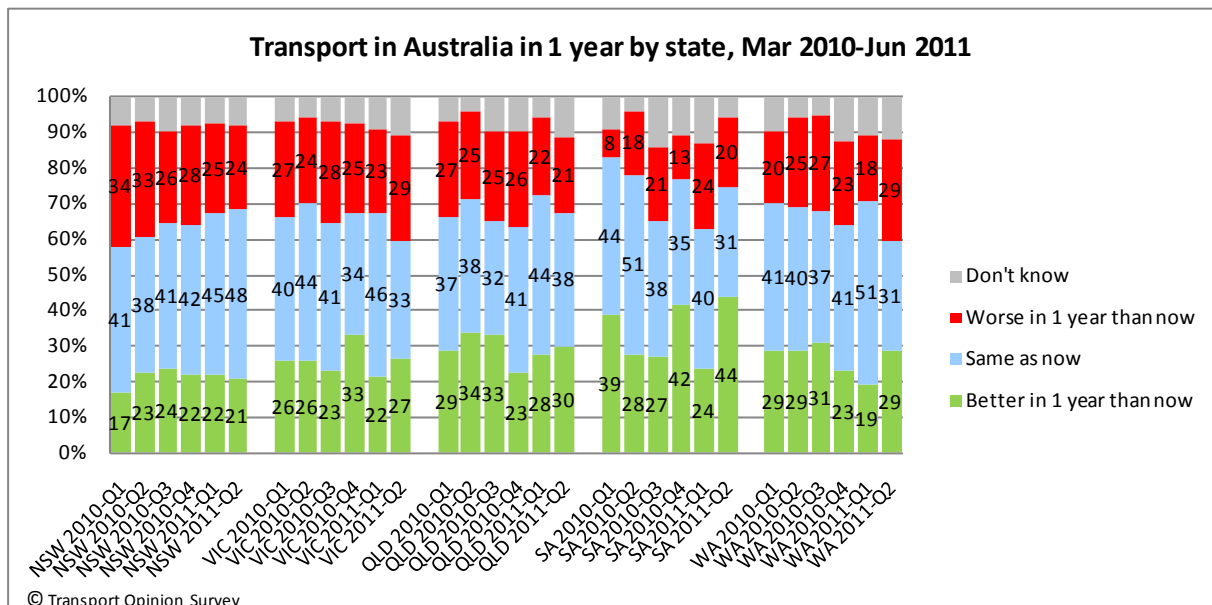


Figure 14 Transport in Australia in 1 year's time by state, March 2010-June 2011



4.7 Confidence about transport in Australia in 5 years time

Respondents are then asked about transport in Australia in five years' time. Australians are much more confident about transport in Australia in five years' time than in one year, with just under half of respondents consistently thinking transport will be better than now (Figure 15). Respondents may be answering in a hopeful, optimistic sense about the future. There is a higher proportion of "don't know" than for transport in Australia in one year's time. By state, NSW residents are generally the least confident of all the states about transport in Australia (Figure 16), although Victoria suffered a decline in confidence in the June 2011 quarter with 27% of residents saying transport in Australia will be worse in five years (up from 21% the previous quarter), consistent with the decline evident from previous questions.

Figure 15 Transport in Australia in 5 years time, March 2010-June 2011

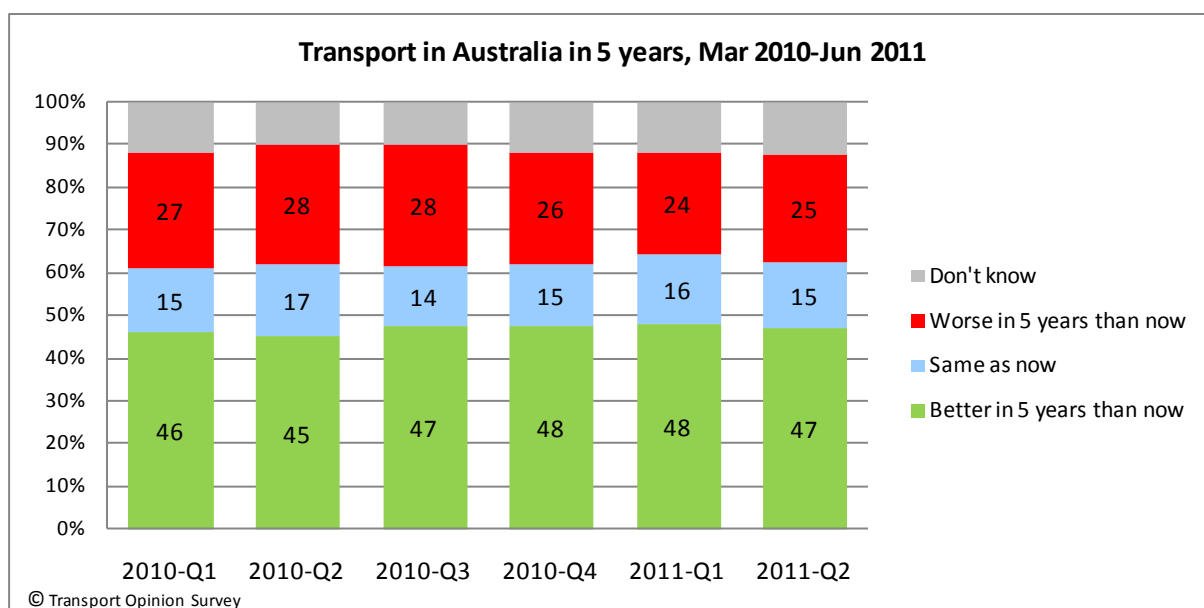
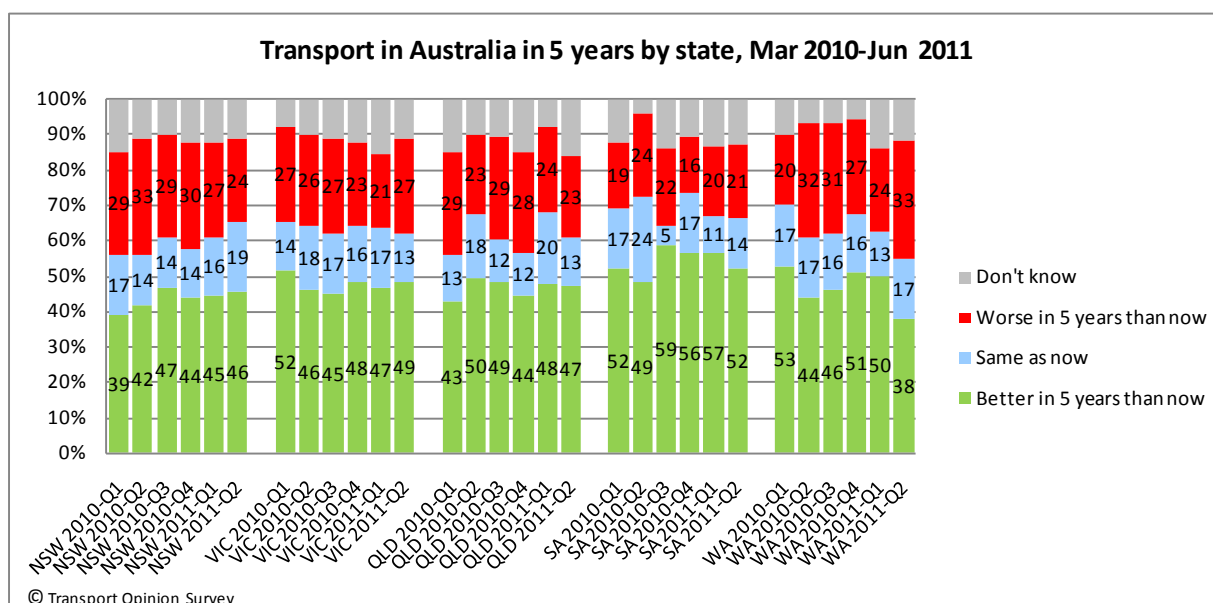


Figure 16 Transport in Australia in 5 years time by state, March 2010-June 2011



5. TOPS Index of transport confidence

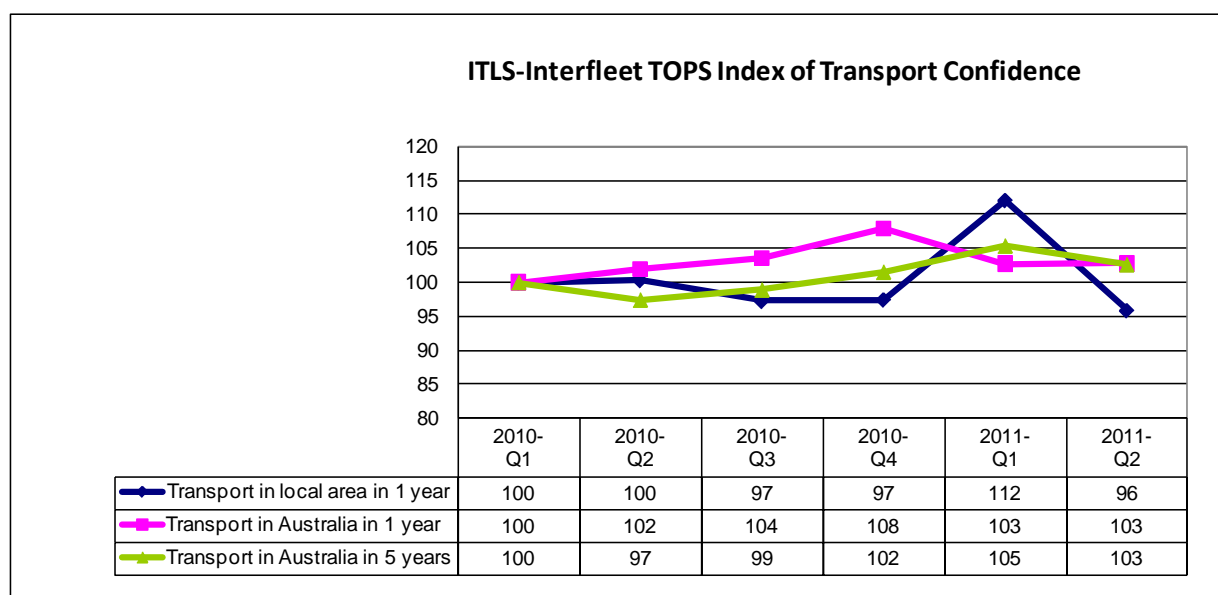
Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in 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 Indices in Figure 17 show that, compared to the start of the survey in March 2010, Australians have become:

- less confident about transport in their local area, with a big increase in confidence in the March 2011 quarter, then a large decline in the June 2011 quarter
- more confident about transport in Australia in one year and in five years, as both indices are above 100.

Because the indices are relative to March 2010, they do not indicate that Australians are more confident about transport in their local area than about transport in Australia, just that people have had a greater change in local area confidence than in their confidence about transport in Australia.

Figure 17 Indices of Transport Confidence



6. Views on other transport issues

Two other questions in TOPS about community views on transport relate to government responsibility for transport, and private sector involvement in provision of public transport.

6.1 Government responsibility for transport

Each quarter, respondents are asked "Do you think your state government or the Australian federal government is most responsible for transport?". Over the six quarters, over half of respondents nominate their state government as most responsible (Figure 18). The lead up to the Federal election in August 2010 with transport announcements in Sydney (Parramatta-Epping Rail Link) and Brisbane (Redcliffe Rail Line) appears to have increased respondents

saying the federal government is most responsible in the September 2010 quarter. The lead up to state elections in NSW in March 2011, and to a lesser extent in Victoria in November 2010, appears to have increased state government responses (Figure 19). There was a change of government in both states.

Figure 18 Level of government most responsible for transport, March 2010-June 2011

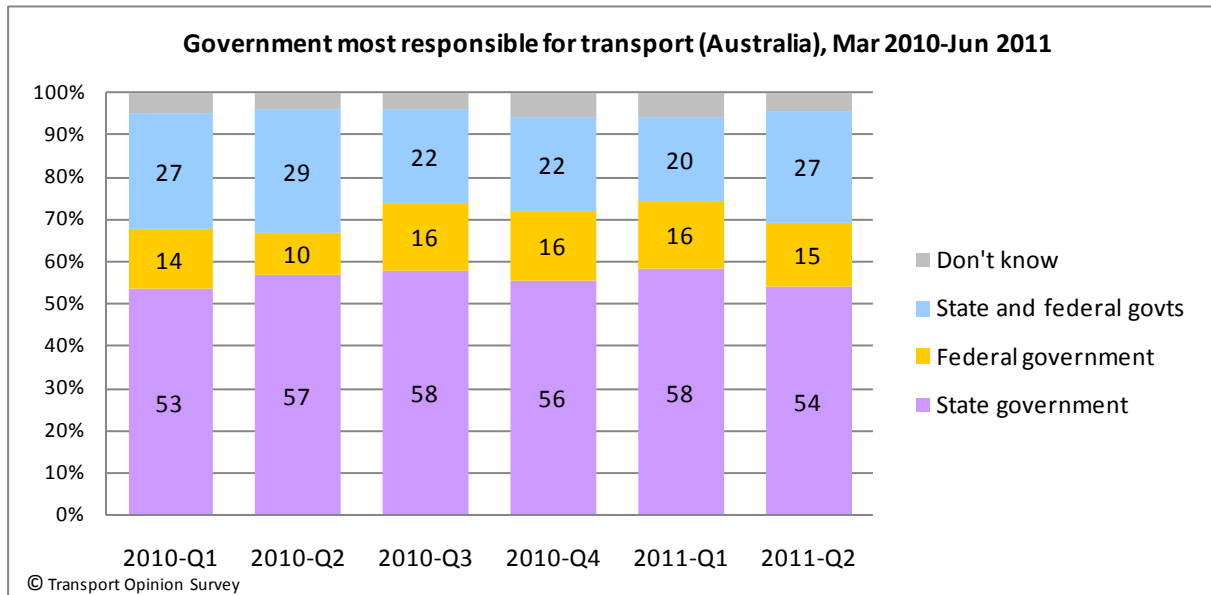
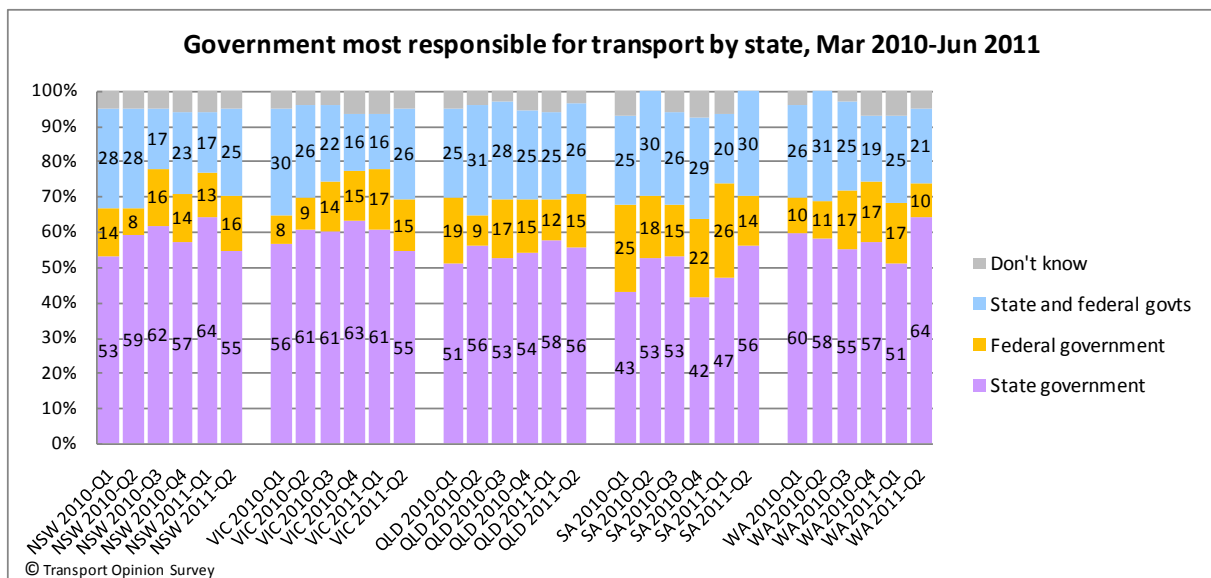


Figure 19 Level of government most responsible for transport by state, March 2010-June 2011



6.2 Private sector involvement in public transport

Respondents are asked "Do you think the private sector should be involved more, involved the same as now, or involved less, in the provision of public transport?". Over the six quarters, in every state except Victoria, more respondents want more private sector involvement in public transport, rather than less (Figure 20 and Figure 21). Victoria is the state which has had the most experience with private sector involvement, with franchising of rail and tram services.

Figure 20 Support for private sector role in provision of public transport, March 2010-June 2011

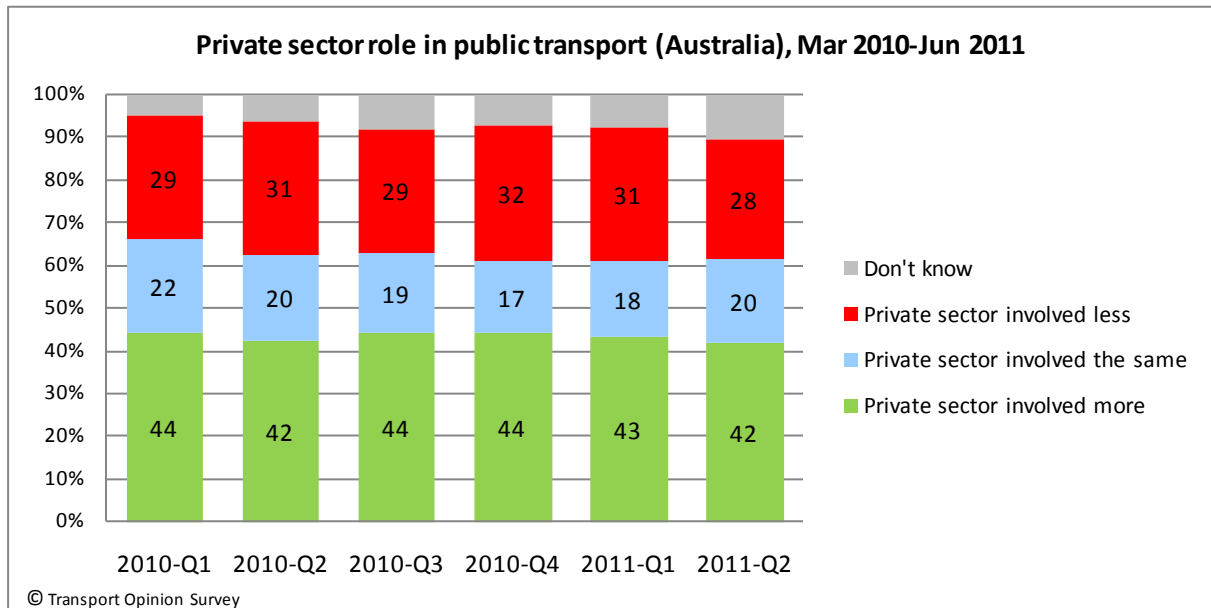
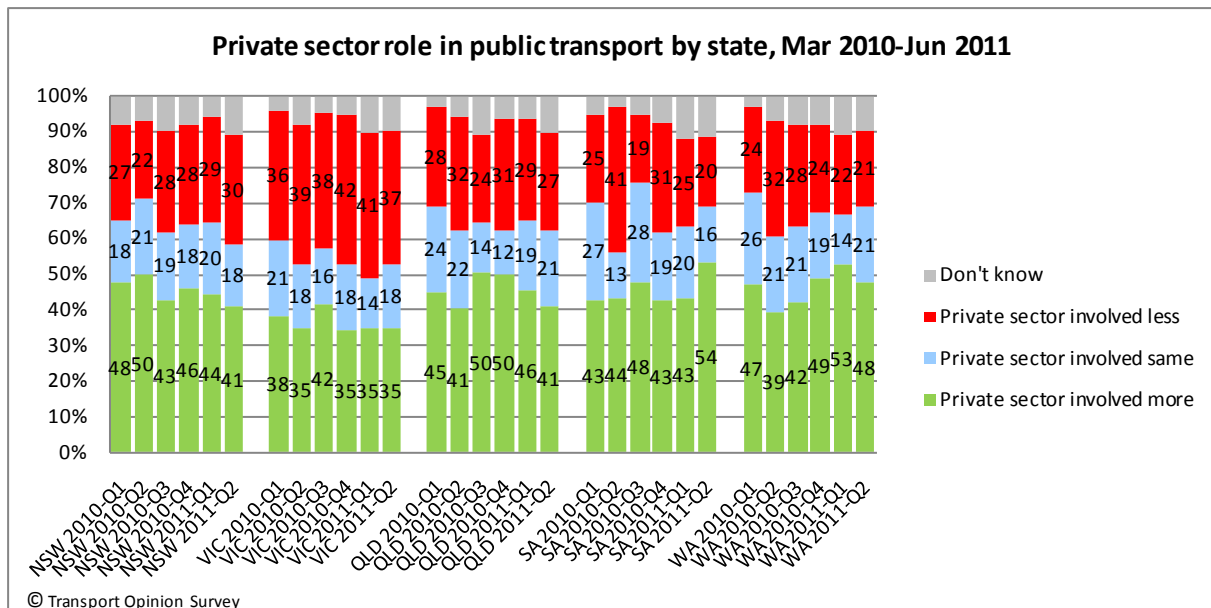


Figure 21 Support for private sector role in provision of public transport by state, March 2010-June 2011



7. Conclusions

Monitoring community sentiment towards transport in Australia through the first six quarters of the ITLS-Interfleet Transport Opinion Survey highlights several issues. There is relative stability of results for Australia as a total over the first six quarters. There is variation in results by state over time, although the variation in smaller states may be attributable to sample size. This relative stability in the national result is not unexpected as transport has not been a major issue during the time of TOPS: there have been no major transport safety or security incidents. Even the natural disasters of floods and cyclones in early 2011 which affected transport infrastructure did not lead to major change in respondents' transport priorities. The frequency of TOPS will be reviewed as more quarters of data become available and trends in stability or changes in community views become apparent.

The indices of transport confidence show that in June 2011, compared to the launch of TOPS in March 2010, Australians are less confident about transport in their local area, but more confident about transport in Australia in one year and about transport in Australia in five years. Australians are more positive about transport in Australia getting better in the long term of five years than in the short term of one year. The five year result may reflect a sense of hope and optimism that the future will be better in general, rather than the specifics of changes in transport.

The ranking of “transport” at the bottom of a list of 11 possible highest priority national issues may highlight the need for greater community awareness of the role of transport and its inter-relationship with other issues. Transport and infrastructure can contribute to improving the top three national priority issues identified in TOPS – health, education and the economy – through their contribution to access to services and opportunities, to physical health, to mental health through social inclusion, and to economic productivity.

TOPS shows there is clear and consistent support for public transport as the highest priority issue for transport. Although the level of support varies by location and public transport use, there is still strong support for public transport over road improvements. The states with the largest cities, NSW and Victoria, generally rate public transport as a higher priority, and are less confident about transport getting better, both in their local area and in Australia. TOPS results on the importance of public transport and community support for improved public transport are consistent with results from other surveys about public transport, such as Property Council of Australia (2011). The decline in confidence in Victoria following the change of state government at the November 2010 election shows how difficult it can be for new governments to meet community expectations for improvements in transport. A post-election increase in pessimism has not yet occurred in NSW.

TOPS provides community stakeholder evidence to support greater investment in public transport. Funding is a major issue for transport investment. TOPS shows community concern that transport investment is not keeping up with population growth. In terms of private sector involvement in provision of public transport, there is more support for more involvement (rather than less). However, it is particularly noteworthy that Victoria, the state with the most experience in private sector involvement in public transport, is the least keen across Australia.

The quarterly ITLS-Interfleet Transport Opinion Survey will continue to monitor community sentiment towards transport over time in Australia. As more quarters of data become available, models will be developed to explain variation in results by state location and demographic characteristics to identify the most significant influences on community confidence. It will also be interesting to compare Australians’ views with other countries in international comparisons as other countries adopt TOPS or similar measures in the future.

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Appendix A Survey dates and key issues

Quarter and Fieldwork date	Key issues before and during fieldwork
Q1 March 2010 (13-28 Feb 2010)	Aust: MySchool website, health reform NSW: MyZone fares in Jan, release of Metropolitan Transport Plan on 21 Feb 2010, release of <i>Sydney Morning Herald</i> Public Transport Plan SA: State election Tas: State election
Q2 June 2010 (15-30 May 2010)	Aust: Mining super-profits tax NSW: Resignation of Minister for Transport David Campbell Other: Aviation disruption from Iceland volcanic eruption
Q3 September 2010 (23 Aug-5 Sept 2010)	Aust: Federal election on 21 Aug 2010, result unclear for 2 weeks, Gillard Labor govt with independent support, high speed rail NSW: Federal funding for Parramatta-Epping rail link Qld: Privatisation of QR, federal funding for Redcliffe rail project in Brisbane
Q4 December 2010 (6-21 Nov 2010)	Vic: State election on 27 Nov with change of government to Liberals
Q1 March 2011 (9-27 Feb 2011)	Aust: Flood levy NSW: Opening of Inner West Busway on 31 Jan; delays to new Waratah rollingstock; state election on 26 March with change of government to Liberals Vic: Floods Qld: Floods and cyclone, Six Queensland road projects delayed to save money for flood recovery SA: O-Bahn City Access Project cut due to flood recovery WA: Fires
Q2 June 2011 (13-29 May 2011)	Aust: Federal budget on 11 May with road and rail funding NSW: Creation of Infrastructure NSW post election