

# THE STATE OF TRANSPORT OPINION POLL SOUTH AFRICA: A COMPARISON OF THE 2012 AND 2013 RESULTS

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## ABSTRACT

South Africans believe that transport is one of the most critical issues today and is surpassed only by education and health. Public opinion plays a vital role in a democracy, but despite public participation being entrenched in the Constitution, service delivery protests seem to indicate that the government is out of touch with the needs of South Africans. In response to this, the Institute of Transport and Logistics Studies (Africa), ITLS (Africa), conducted a survey of 1,000 adults across South Africa in 2012 to gauge opinions on transport issues. Interest in the inaugural State of Transport Opinion Poll resulted in the implementation of an annual survey which seeks to provide a reliable indicator of South Africans' ongoing attitudes towards transport. The purpose of this paper is to compare the results of the 2012 and 2013 surveys to establish current public opinion on transport matters and determine whether this is changing. The top transport issues identified by respondents were quality of roads, public transport and taxi related issues. This research also highlights a loss of confidence in the ability of national and local authorities to deliver safe, effective and reliable transport services. The 2013 survey shows that private cars remain the main mode for commuter transport, whilst taxis remain the dominant form of public transport. This appears to indicate a disconnection between commuter needs and transport policy implementation.

### 1. BACKGROUND:

Transport policy is well documented and described in South Africa. From the White Paper on National Transport Policy (Department of Transport, 1996) to the issues addressed in the more recent National Development Plan (National Planning Commission, 2011), transport has been one of the issues at the forefront of the South African political arena since the onset of the new democratic dispensation in 1994. The White Paper's vision for South African transport is of a system which will: *"Provide safe, reliable, effective, efficient, and fully integrated transport operations and infrastructure which will best meet the needs of freight and passenger customers at improving levels of service and cost in a fashion which supports government strategies for economic and social development whilst being environmentally and economically sustainable"*. Similarly, the National Development Plan highlights investments in transport infrastructure and improving public transport as key development areas that are critical to the achievement of the 2030 objectives, which are primarily aimed at eradicating poverty and reducing inequality in South Africa.

Despite the clear focus on improving transport infrastructure, increasing access and mobility levels, improving affordability, ensuring safety and reliability and increasing efficiency and effectiveness, public opinion appears to indicate that many of these policy imperatives are not being met. The transport sector has been plagued by regular strikes for the past few years. Resistance to the implementation of e-tolls has been well documented (Magubane, 2013; Sapa & Outa, 2013; People Against The Gauteng E-Toll System, 2011), however there are numerous other transport related problems. Demonstrations have ranged from commuters protesting against fare hikes by pelting buses with stones (SABC, 2013) to marches against potholes (Road Safety & Arrive Alive Blog, 2011) and poor train services (Sapa, 2013b) to strikes or threats of strikes for better pay and working conditions (Sapa, 2013a) or rail fare hikes (Eyewitness News, 2012) to threats of burning trains if train services don't improve (Maromo, 2013).

It is estimated that there are approximately 8,000 incidents (protests, demonstrations, etc.) classified under the "Gatherings Act" (State President's Office, 1993) per year (Mottiar & Bond, 2012) in South Africa. Although these refer to complaints over a wide range of issues, the high levels of community demonstrations indicate a growing discontent with government service provision. The relatively high number of service delivery protests in the transport sector suggests that, despite comprehensive and idealistic policy and high levels of spending in the sector (Cliffe Dekker Hofmeyr, 2013; Stanlib, 2013), the needs of transport users are not being adequately met.

Friedman asserts that people engaging in protests want to be heard (Rumney, 2013). In democracies, governments are created by society and it is therefore critical that the public's opinion is taken into account in decision making. Although public opinion does not necessarily result in binding decisions, it provides valuable criticism of state decision-making and can serve as a counterweight to the state. (Fraser, 1990 in Sommerfeldt, 2013). South Africa's frequent service delivery protests suggest that policy is not being implemented and the opinions of society are not being heard.

## **2. AIM OF PAPER:**

The aim of the annual ITLS (Africa) State of Transport Opinion Poll South Africa (TOPSA) is to measure public opinion across South Africa on a range of transport related issues, especially passenger transport<sup>1</sup>. The intention of TOPSA is to obtain an indication of community confidence regarding transport in South Africa. TOPSA is a telephone survey of 1,000 South Africans citizens, aged 18 years and over, with all South African provinces being represented. The purpose of this paper is to compare the results of the 2012 (Luke & Heyns, 2013a) and 2013 surveys to ascertain existing public opinion on selected transport matters, as well as to determine any shifts in public perception.

## **3. RESEARCH METHODOLOGY:**

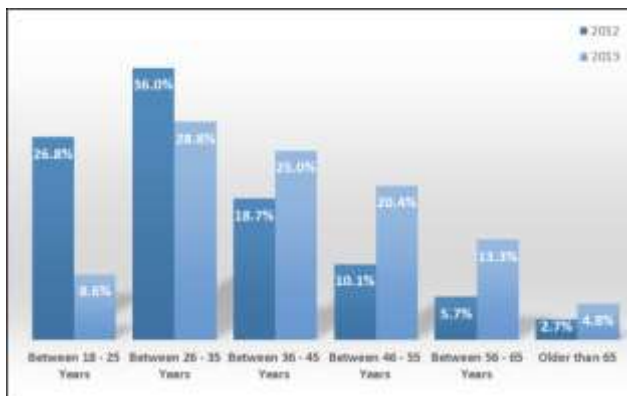
A two-phase approach was followed: In Phase 1, respondents were randomly selected from a database of valid subscriber phone numbers and were either sent a recruitment short message service (SMS) or telephoned to (a) enquire if they were willing to participate in a survey and (b) to identify the region in which they reside. In Phase 2, a computer-aided telephonic interview (CATI) was conducted with the willing respondents identified in Phase 1. A market research company, using trained interviewers, conducted the telephonic surveys in both 2012 and 2013.

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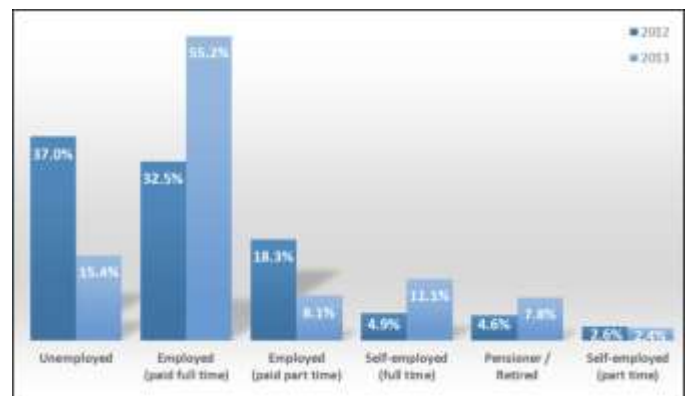
<sup>1</sup> A detailed discussion of public transport and performance (using the TOPSA 2012 survey results) can be obtained from Luke & Heyns, 2013b

During Phase 1 of the 2013 survey, three SMS / telephone campaigns were conducted. In the 2012 survey it was necessary to conduct four campaigns. The target sample for each survey was randomly selected from willing participants. In 2013, 1,000 respondents were randomly selected from 4,762 willing participants, representing a participation rate of 21%. In 2012, 1,000 respondents were randomly selected from 2,439 willing participants, which is a participation rate of 41%. All respondents that were contacted completed the survey.

The research instrument requested demographic information such as location, age, gender and employment status. The profiles of the respondents for 2012 and 2013 are depicted in figure 1 to figure 3.



**Figure 1: Respondents' age profile**



**Figure 2: Respondents' employment profile**

The majority of the respondents for the 2012 survey were between the age of 18 and 35 years, compared to the 2013 survey where most were between 26 and 45 years old. The employment profile of the respondents differed considerably, as a result of the random selection process. The majority of the 2013 respondents were employed full time. In the 2012 survey, unemployment was the single largest employment grouping.

In the 2013 survey the majority of the respondents resided in metropolitan areas (37.5%), followed closely by respondents in towns/villages (31.1%). The other respondents resided in small cities (17.5%) and rural areas (13.9%). In 2012, 22.5% of respondents were from metropolitan areas, 17.6% from small cities, 37.7% from towns/villages and 22.1% from rural areas.

Due to their populations comprising approximately 50% of South Africa's total population, the results from Gauteng, KwaZulu Natal and the Eastern Cape significantly influence the overall results. The results from smaller provinces such as the Northern Cape, Free State and North West, comprising approximately 14% of South Africa's population, could be more variable due to the small sample size.



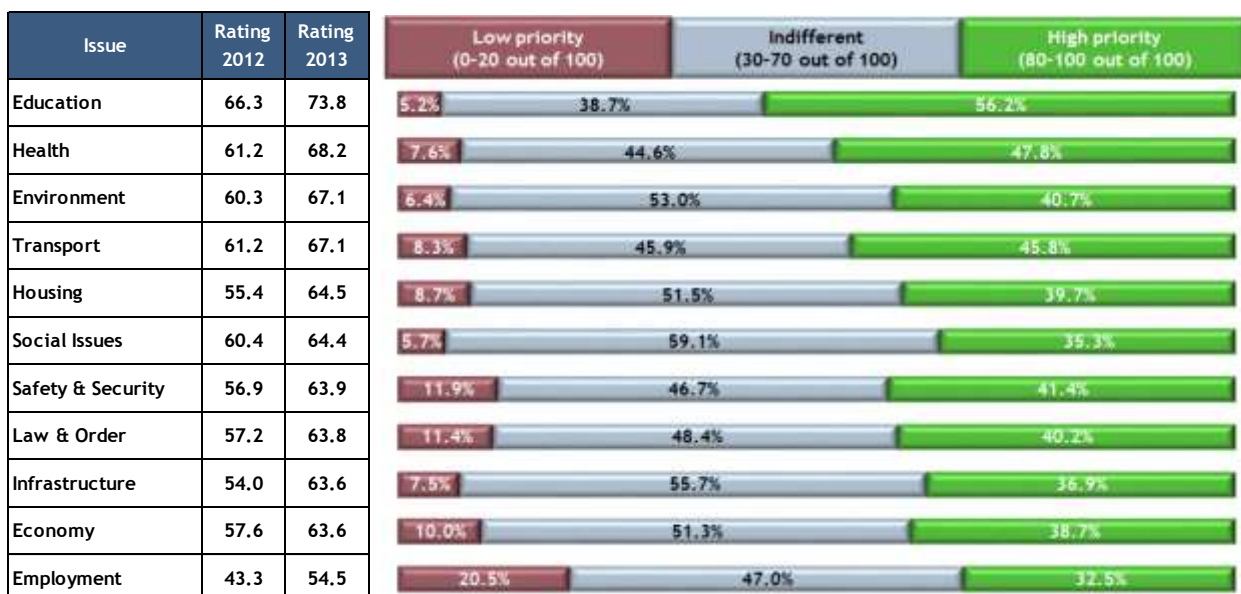
**Figure 3: Respondents' geographical location**

The demographic profile from the survey approximated an appropriate reflection of the South African demographic profile (Statistics South Africa, 2012). Although it might be seen as a limitation to the study, the convergence of the data led the authors to believe that the sample size is sufficiently large to reflect public opinion on transport matters in South Africa. This is supported by the British Polling Council (British Polling Council, n.d.), which asserts that “in a random poll of 1,000 people, with a 100% response rate, then 19 times out of 20, a poll will be accurate to within 3%.”

#### 4. RESEARCH RESULTS

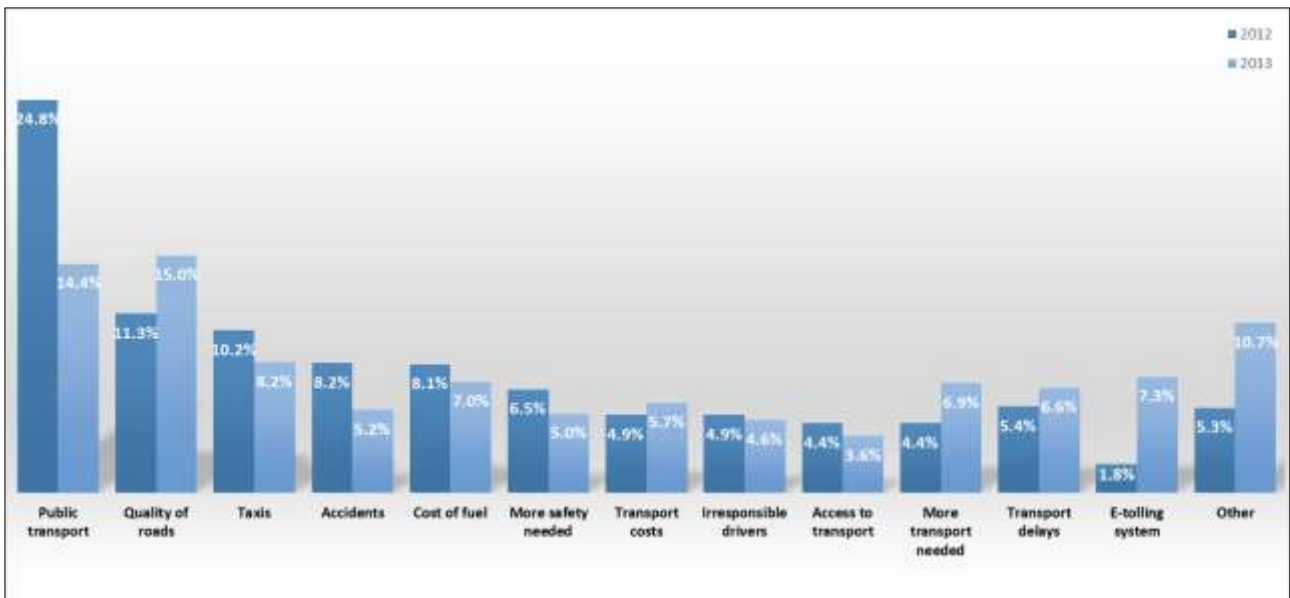
The key public transport areas that were investigated include whether transport is a national priority, the highest priority issues in transport, changes in transport conditions locally as well as nationally and public transport usage. Other issues that were tested in 2012 pertained to funding and public sector involvement, whereas the 2013 survey also included perceptions on e-tolls, road safety and law enforcement.

Similarly to 2012, the 2013 survey identified education as the highest priority issue in South Africa today. It was nominated by 56% of the respondents as one of the four highest priority issues with health, transport and the environment as the other three main areas of importance. The rating in figure 4 reflects the average rating for all respondents in 2012 and 2013 respectively (respondents were asked to rate issues on a scale where 0 = very low priority and 100 = very high priority). Figure 4 also provides the priority grouping segments for the 2013 responses. This indicates that although the ratings of transport and the environment were equal in 2013, more respondents gave transport a high priority rating (45.8%).



**Figure 4: Rating of national issues**

The results from the 2013 survey, as depicted in figure 5, indicate that public transport (including aspects such as frequency, quality of service, and availability), quality of roads and taxi related issues are still the three highest priority issues in transport in South Africa today, although the order of the top three issues has changed. It is evident from the results that quality of roads, the availability of transport and e-tolling have increased as priority issues in the last year.



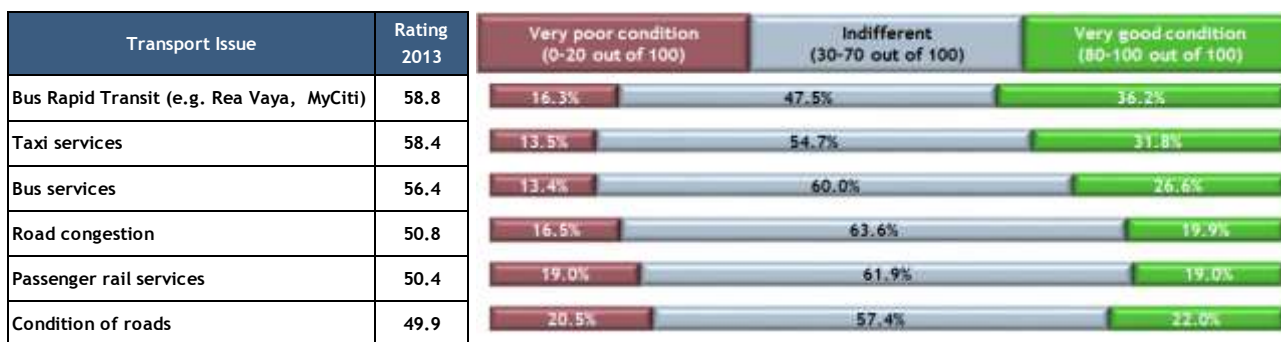
**Figure 5: Highest transport issues**

When questioned on the current state of local transport, only 29% of the respondents felt that transport in their local area was better now than a year ago. This has dropped from 32% in 2012, indicating a decline in community confidence regarding local transport services and conditions. The number of respondents that either felt that there was very little change or that it was much worse than a year ago grew from 68% in 2012 to 71% in 2013.

Respondents that indicated that transport in their local area was worse than a year ago, attributed this primarily to the declining quality of roads, the lack of availability of public transport services and taxi related aspects. This differs slightly from the 2012 results where respondents included the high cost of transport (as opposed to taxi related aspects) in the top three.

When tested on the outlook for transport in South Africa in the next five years, the majority (59%) of the 2013 respondents indicated that they believed it would be worse or they were indifferent. This is considerably different from the 2012 results which indicated that the majority (56.8%) of respondents believed that transport would be much better in five years' time.

Respondents from Mpumalanga and the North West Province were the most positive regarding the five year outlook for South African transport, whilst the Free State and the Eastern Cape were the most negative. In 2012, Limpopo and Mpumalanga respondents were the most positive, while Western and Eastern Cape were the most negative. Respondents from the Eastern Cape and the Free State were also the most negative regarding the long term outlook for transport in their local areas.



**Figure 6: Rating of specific transport issues**

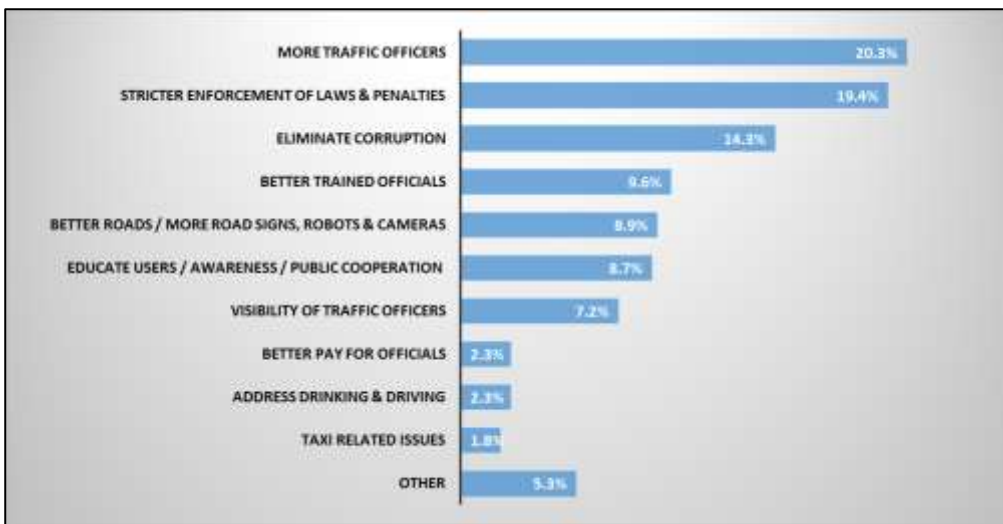
A number of transport issues were tested to determine whether respondents believed the services or issues were generally in a good or poor condition. Specific issues such as quality of vehicles, service frequencies and availability/condition of facilities were not explicitly tested. These are illustrated in Figure 6. Respondents are most positive about BRT. Although respondents were also relatively positive about taxi services, this has declined since 2012 when 38% of respondents indicated that these were in a very good condition. Similarly, attitudes towards road conditions, bus services and passenger rail services have worsened. Attitudes towards BRT and road congestion were not measured in 2012.

TOPSA was also used to test attitudes towards government responsibility and involvement in transport, toll roads, law enforcement and traffic behaviour culture. In 2012, respondents were asked to indicate which level of government they believe were most responsible for transport matters. Respondents mainly indicated local and national government, with provincial governments only playing a small role. Government policy is to devolve the responsibilities for public transport to the lowest possible level of government. It is evident that although many respondents indicated that local area governments are responsible for transport provision, the majority still feel that national government plays a leading role. The majority of the respondents also indicated that the private sector should be far more involved in the provision of public transport.

Regarding toll roads, in 2012 the majority of respondents (53.6%) indicated that they believed that toll roads are a good way of financing new roads or improving existing roads. In 2013, respondents were asked if they were willing to pay toll fees on their daily travels if it would improve their travel time. More respondents indicated that they weren't willing to pay (48.5%) than those who were willing to pay (41.5%). In Gauteng and the Western Cape, where issues regarding e-tolls are contentious, the percentage of respondents who are not willing to pay for tolls rises to 53.2% and 55.9% respectively.

Testing whether respondents believed that there is a culture to non-adherence to traffic laws, the 2013 survey revealed that 31% believed that there was very good adherence to the laws, whilst only 23% indicated very poor adherence and the remainder indicated average adherence. Similarly, 37% of respondents indicated that they believed that traffic law enforcement in South Africa was very good and 20% believed it was very poor.





**Figure 7: Improvement of law enforcement and road safety**

The survey instrument was also used to test the frequency of public transport usage. When considering the regular users of public transport (four to seven times a week), the 2012 survey results indicated that taxis were the foremost mode of transport, followed by buses. This is also the case for respondents who use public transport two to three times a week. For public transport users that commute less regularly, buses become the dominant mode (see Table 1). Nearly two-thirds of the respondents indicated that they had never used trains, which is largely the result of the level of commuter rail coverage. In contrast, 86% of the respondents had used taxis as a form of public transport at some point. Table 1 indicates that very few respondents never use any form of public transport at all (Luke & Heyns, 2013b).

**Table 1: Public transport usage – TOPSA 2012**

| Public transport usage | Taxi  | Gautrain | Train | Bus   |
|------------------------|-------|----------|-------|-------|
| 4-7 times a week       | 73.1% | 1.0%     | 8.4%  | 17.5% |
| 2-3 times a week       | 57.9% | 4.8%     | 14.4% | 22.9% |
| Once a week            | 39.2% | 5.4%     | 17.5% | 38.0% |
| Once every 2 weeks     | 27.1% | 7.0%     | 27.1% | 38.8% |
| Once a month           | 16.7% | 13.0%    | 24.3% | 46.1% |
| Less than once a month | 10.1% | 19.4%    | 32.1% | 38.4% |
| Never use              | 13.8% | 85.4%    | 64.8% | 40.2% |

Source: Luke & Heyns, 2013b

In TOPSA 2013, the survey instrument was adjusted to take into account private car usage as well as that of BRT. For regular transport users, almost 60% used private cars as their primary mode of transport. For the respondents who commute less frequently (2 – 3 times a week), this drops to approximately 33%.

Table 2 below indicates that taxis and buses are still the dominant modes of transport for regular commuters. Similarly, as the regularity of transport usage declines, buses become the predominant mode. Note that table 2 should be read with caution. For example, taxi usage for regular commuters appears to have declined from 73.1% to 59.7%. Although this could have been attributed to the changes in the demographic composition of the two surveys, tests within the same demographic profiles over both years indicated a decline in taxi usage over every group tested. It is however not possible to determine whether this can be construed as a trend as demographic groupings are too small and the data has only been collected over a two year period.

**Table 2: Public transport usage – TOPSA 2013**

| Transport usage        | Taxi  | Gautrain | Train | Bus   | BRT   |
|------------------------|-------|----------|-------|-------|-------|
| 4-7 times a week       | 59.7% | 0.7%     | 11.2% | 22.3% | 6.1%  |
| 2-3 times a week       | 46.8% | 2.3%     | 6.2%  | 31.2% | 13.5% |
| Once a week            | 37.9% | 8.0%     | 6.5%  | 30.3% | 17.3% |
| Once every 2 weeks     | 21.0% | 7.9%     | 9.6%  | 37.8% | 8.9%  |
| Once a month           | 21.4% | 11.8%    | 13.7% | 37.9% | 15.2% |
| Less than once a month | 14.9% | 14.2%    | 21.1% | 30.2% | 19.6% |
| Never use              | 32.2% | 82.6%    | 72.5% | 34.0% | 70.9% |

The results indicated that regular transport users (4 -7 times per week) from the North West Province used taxis more than any mode of transport (53%), whilst those from the Western Cape used taxis the least (27%). Where private cars are used for regular commuting, respondents from Limpopo were the most prolific (85%) and Eastern Cape the least prolific users (69%).

For regular train commuters, Western Cape respondents recorded the highest percentage (15%), whilst the Free State, Mpumalanga and the Northern Cape did not have any regular train commuters, as can be expected based on the commuter network coverage.

For regular bus commuters, the Eastern Cape and Mpumalanga are the most prolific (16% each), whilst the Free State and the Northern Cape are the least prolific users (4% each). This could also largely be attributed to network coverage.



## 5. CONCLUSION

The purpose of the ITLS (Africa) State of Transport Opinion Poll South Africa (TOPSA) is to measure public opinion on a range of transport related issues in South Africa. The opinion poll was conducted in 2013 for the second time and is starting to create the foundation for a long term determination of trends in community confidence in transport related matters. The results from the 2012 and 2013 surveys have provided the basis for this first comparison.

The 2013 survey indicates that respondents still believe that transport is one of the most important issues facing the country and that the highest transport priorities within South Africa are the quality of roads, public transport and taxi related issues. Whereas in 2012 the quality of roads was the second highest of these issues, this has now significantly surpassed public transport and overwhelmingly being indicated as the top transport priority. This clearly suggests that quality of roads now needs urgent interventions at all levels of government.

Whilst respondents generally seems to be satisfied with the condition of the BRT systems in the country, users appear to be losing confidence in most of the other aspects that were tested, i.e. availability and quality of bus, train and taxi services, the quality of roads, and road congestion. The results regarding toll roads also indicate, particularly in provinces where this issue is contentious, dissatisfaction in the manner in which these services are delivered or administered.

Although the results were not conclusive in terms of whether there is a culture of non-adherence to traffic laws, as well as the state of law enforcement, most respondents indicated that there was a need for more and better traffic officers, stricter law enforcement and that corruption needed to be eliminated.

A range of issues were tested regarding the use of public and private transport. The results indicated that the level of private car use for regular commuting is very high across all provinces and demographic profiles.

Taxis are still the dominant form of public transport for regular commuters, followed by buses. Although the results seem to have indicated a decline in taxi use for regular commuting, it cannot yet be determined whether this is a long term trend or not.

The new government's vision for commuter transport has always focused on the provision of a transport system that is safe, reliable, effective and affordable and meets the needs of the commuting public in a way that is environmentally and economically sustainable. The results of these surveys indicate that, according to the respondents, commuter transport is not yet safe, reliable, effective or affordable. Respondents, through their reported modal choices, also indicated that the most environmentally and economically sustainable modes are not being used as the preferred modes of travel. This indicates that although commuter needs and transport policies are strongly aligned, policy imperatives are not being implemented as envisaged and commuter confidence is declining.

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