

Institute of Transport and Logistics Studies–Interfleet Transport Opinion Survey (TOPS)

Quarter 1, March 2011

Highlights

- In the March 2011 quarter, 7% of Australians nominated transport and 14% nominated infrastructure as one of the two highest priority issues in Australia today, with transport highest in NSW and Victoria.
- Half of Australians (49%) said the highest priority issue for transport in Australia is public transport improvements. Support for public transport continued to be highest in Victoria.
- One in five Australians (20%) said transport in their local area was better now than a year ago, similar to the previous quarter, and 23% said transport is worse now.
- Over half of Australians (55%) said transport in their local area will be the same as now in one year's time, and only 19% said it will be worse in one year. These are the most positive results since the survey started.
- There was an increase in Australians who think transport in Australia will be the same in one year's time than now (45%, up from 39% last quarter), and a decrease in those who think transport will get worse. This is the most positive quarter of results since the survey started.
- Australians continue to be more confident that transport in Australia will be better in five years than in one year, with almost half (48%) thinking transport in Australia will be better in five years.
- The TOPS Index shows that in the March 2011 quarter, compared to the previous quarter, Australians became more confident about transport in their local area in one year's time.
- 58% of Australians said their state government is most responsible for transport, while 16% nominated the federal government as most responsible. Of all the states, NSW said their state government is most responsible for transport (64%). The NSW state election on 26 March 2011 appears to have focused attention on the state government role in transport, as the Victorian election did in Victoria last quarter.
- 43% of Australians said the private sector should be involved more in the provision of public transport, while 31% said the private sector should be involved less. Victoria continues to be the only state in which residents who want less private sector involvement in public transport outnumber those who want more involvement.

About the Transport Opinion Survey

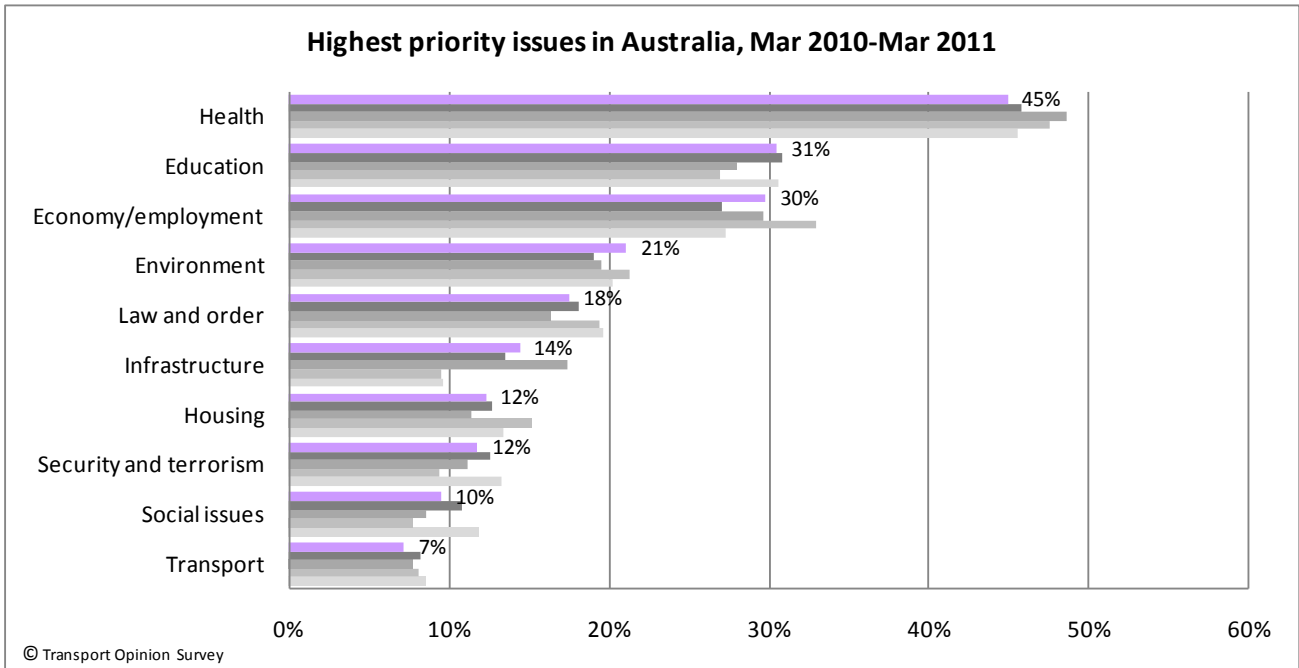
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained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

The Quarter 1, March 2011 survey was conducted over 9-27 February 2011. Current issues in the quarter included the floods and cyclone Yasi in Queensland, floods in Victoria, fires in WA, and the lead up to the NSW state election on 26 March 2011.

1. Transport as a national priority

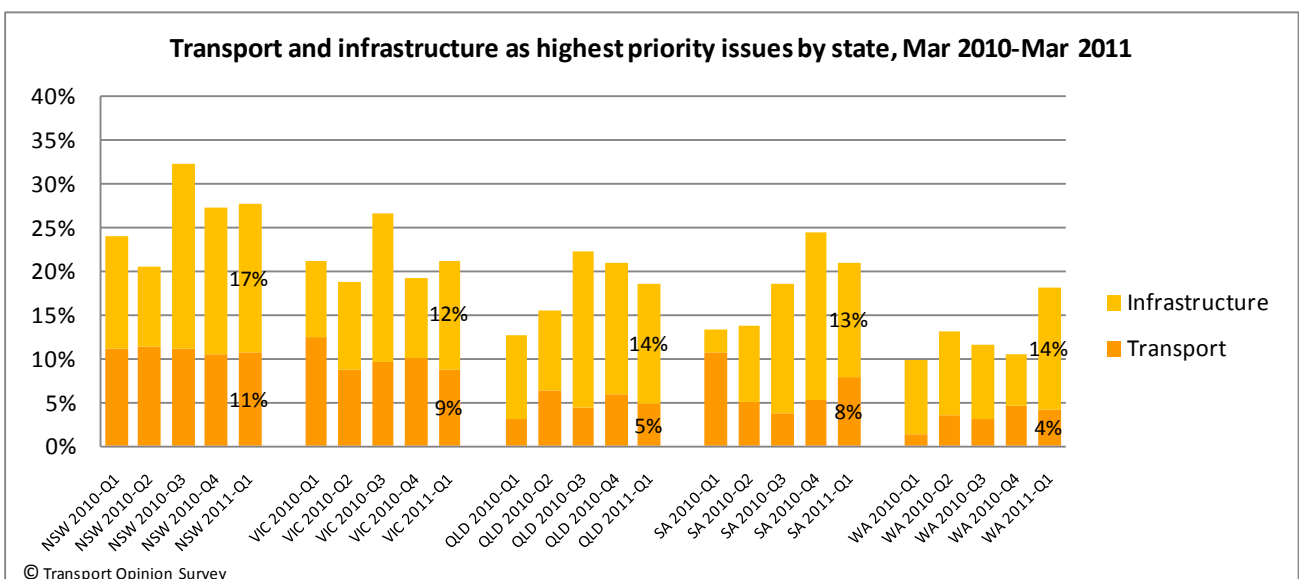
Which two of these issues [from list of 11 issues] do you think are the highest priority in Australia today?

- In the March 2011 quarter, health remained the highest priority issue in Australia today: health was nominated by 45% of Australians as one of the two highest priority issues, followed by education (31%) and economy/employment (30%).
- In the March 2011 quarter, 7% of Australians nominated transport as one of the two highest priority issues in Australia today, and 14% nominated infrastructure, similar to the previous quarter.



Note: Responses sum to 200%. Previous quarter results (March, June, September and December 2010) in grey.

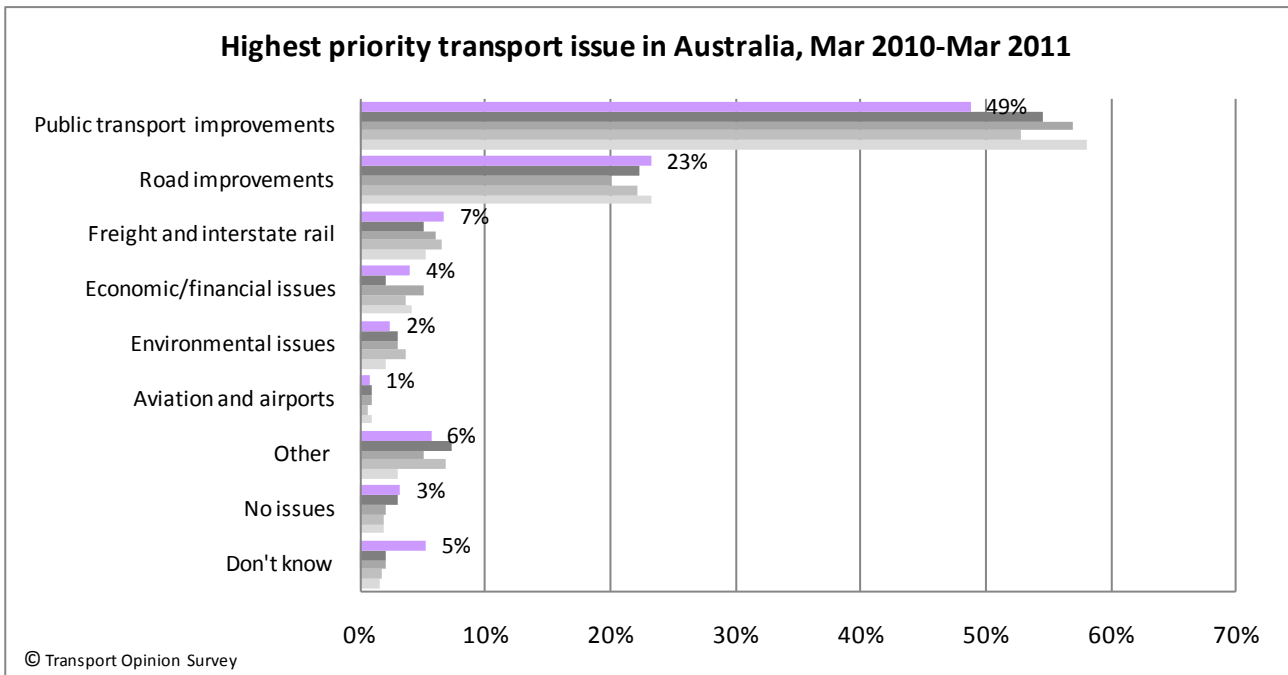
- In the March 2011 quarter, there was little change in transport as a priority issue by state, with transport remaining most important in NSW and Victoria.



2. Highest priority issue for transport

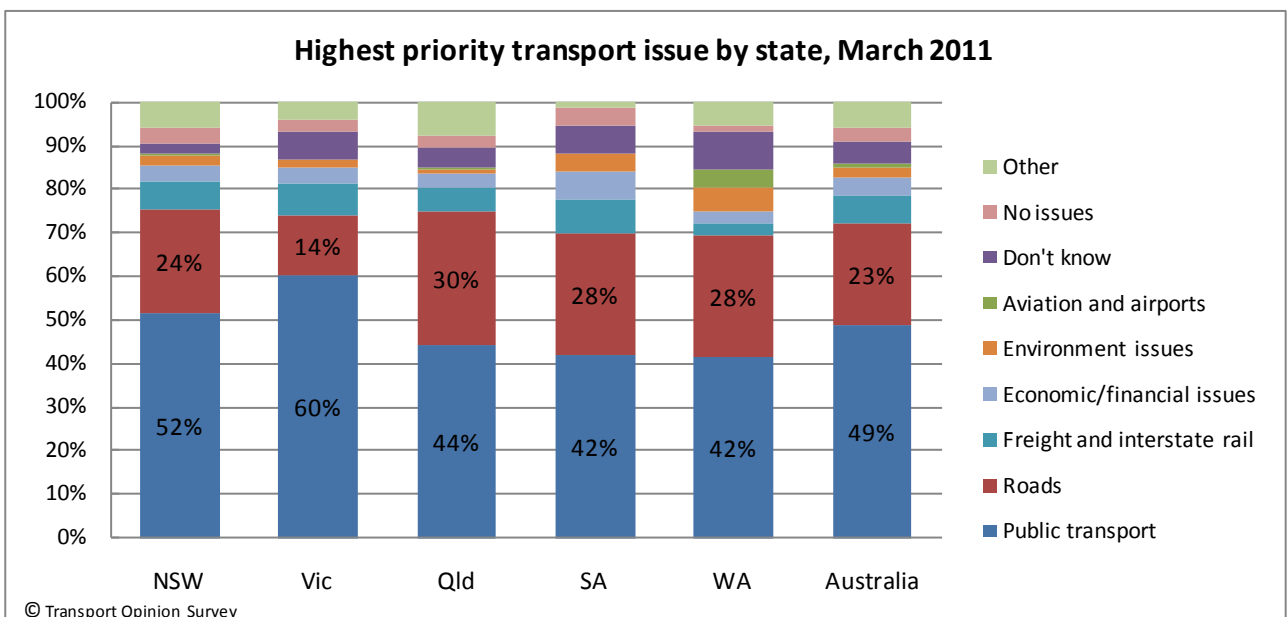
What do you think is the highest priority issue for transport in Australia now?

- In the March 2011 quarter, half of Australians (49%, down from 54% last quarter) said the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue in every quarter of the survey. 23% of Australians said road improvements are the highest priority issue in transport. Less than 2% of Australians said rebuilding transport after disasters was the highest priority transport issue.



Note: Responses were grouped into the above categories. Responses sum to 100%. Previous quarter (March, June, September and December 2010) results 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.

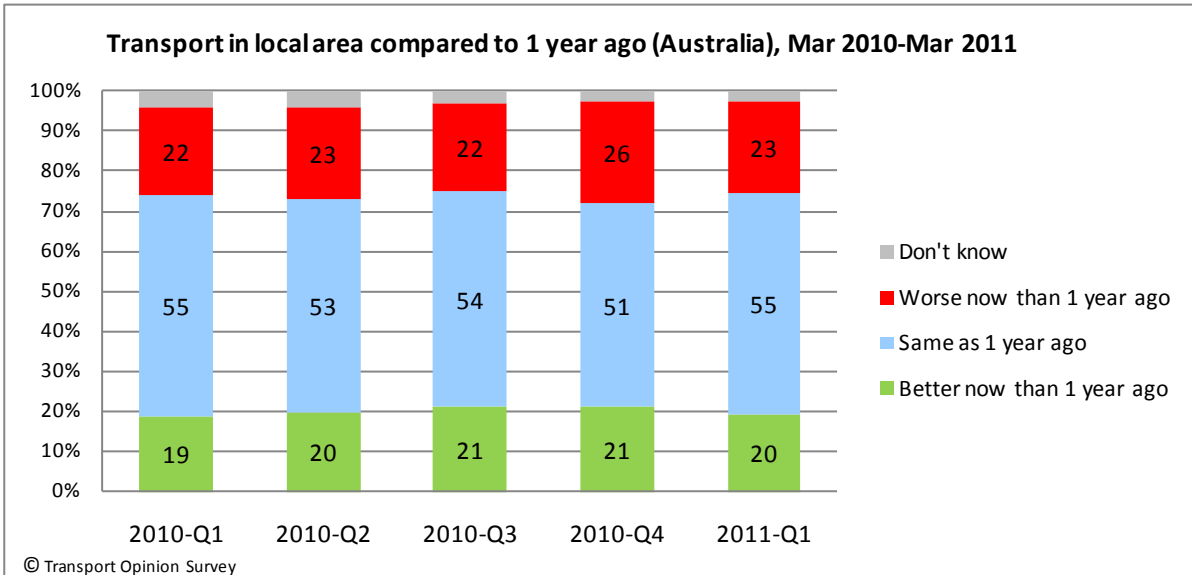
- Public transport improvements was the highest priority issue in transport in every state, as it was in the previous quarter, with the highest support in Victoria. 5% of Queensland residents said rebuilding transport was the highest priority transport issue (included in "Other" in the graph below).



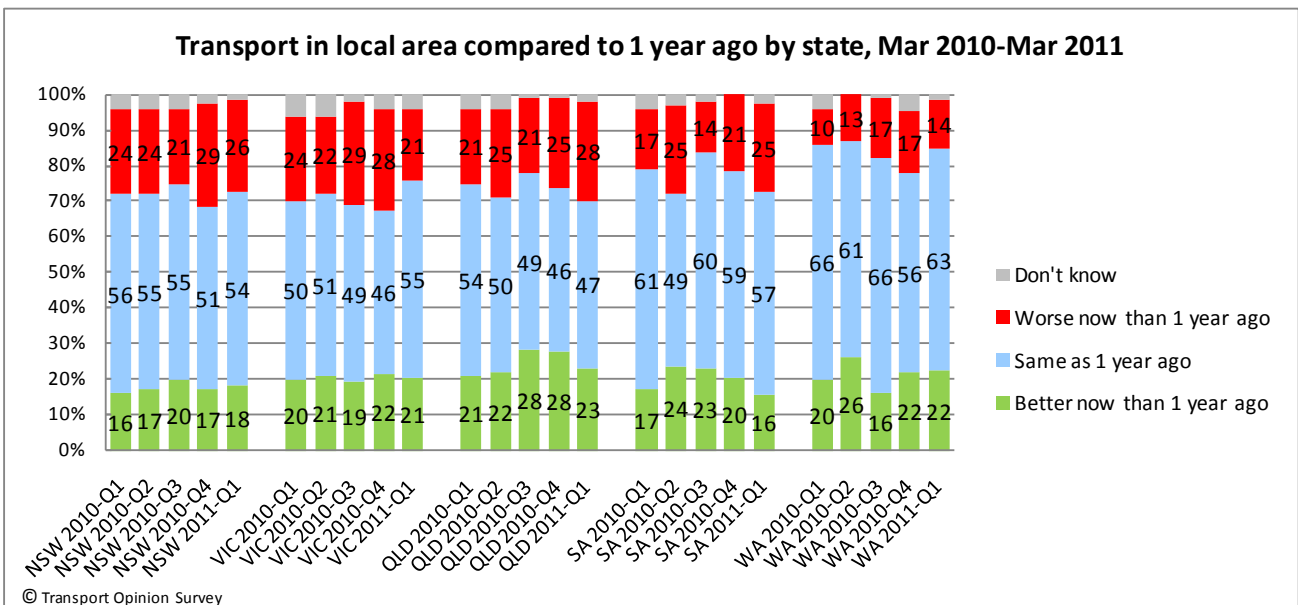
3. Confidence about transport improving in local area

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?

- In the March 2011 quarter, one in five Australians (20%) said transport in their local area improved in the last year, while 55% (up from 51% last quarter) said transport was the same as a year ago.

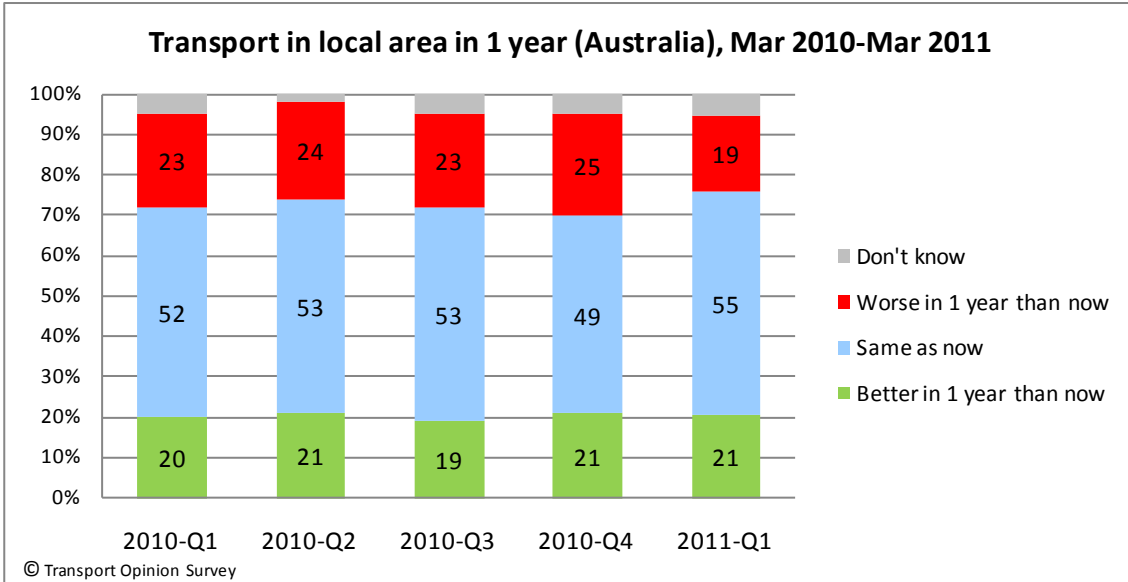


- In the March 2011 quarter, there was an increase in Victorian, NSW and WA residents who said transport in their local area is the same compared to a year ago. 28% of Queensland residents said transport is worse now than one year ago (up from 25% last quarter) and the highest of any state, overtaking NSW and Victoria. Victoria had a decrease in residents who said transport was worse now than one year ago (21%, down from 28% last quarter).

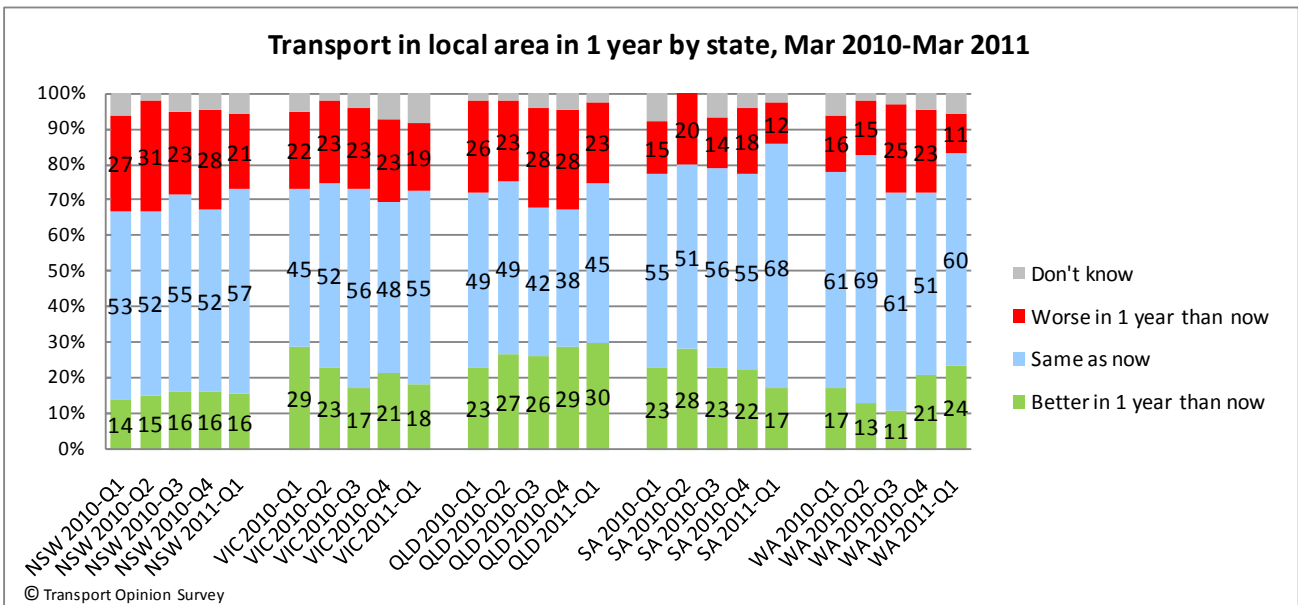


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In the March 2011 quarter, there was an increase in Australians who said transport in their local area will be better in one year's time (55%, up from 49% last quarter) and a decrease in those who said it will be worse (19%, down from 25%). The results are the most positive quarter since the survey started.

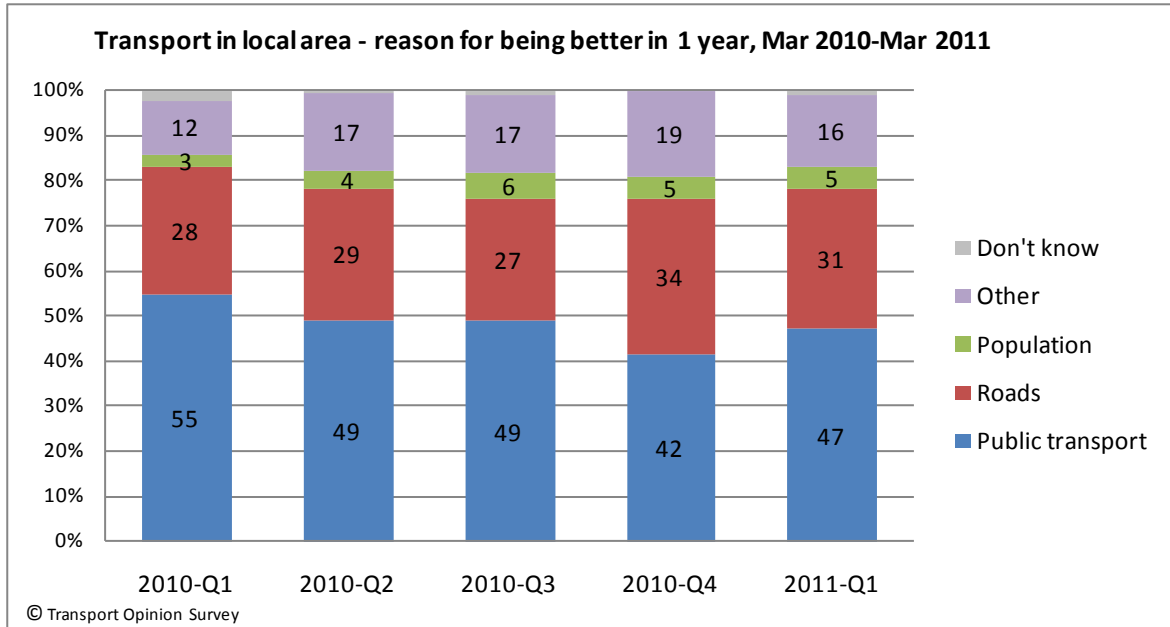


- In the March 2011 quarter, there were increases in residents who said transport in their local area will be the same in one year in every state, and a corresponding decrease in every state of residents who think transport in their local area will be worse in one year's time.



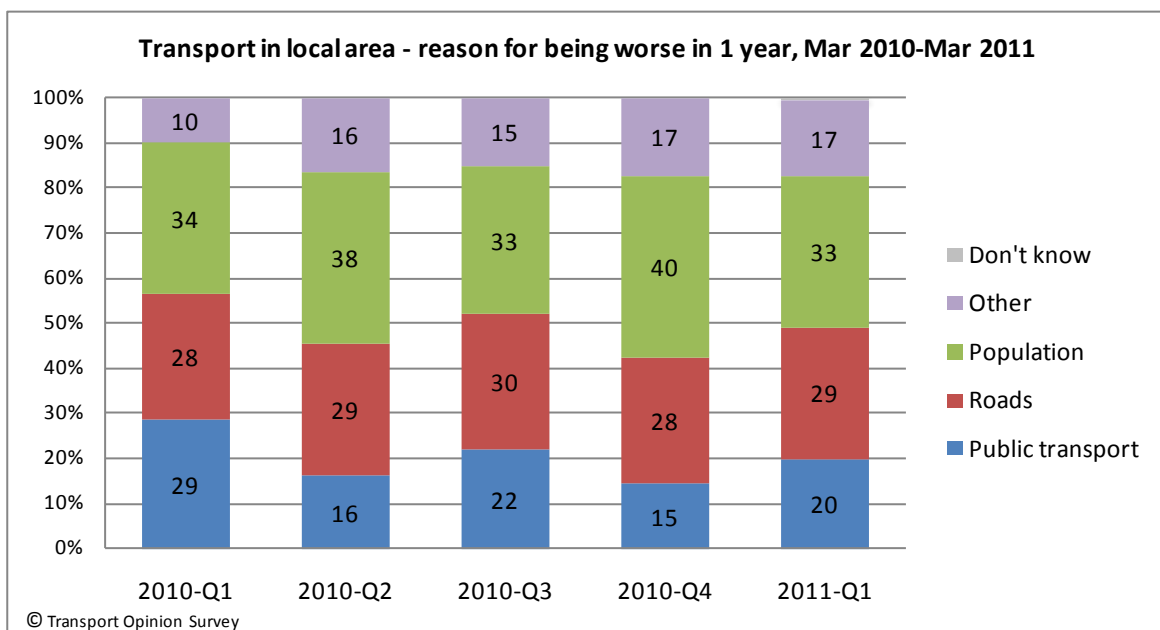
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the March 2011 quarter, the 21% of Australians who said transport in their local area will be better in one year were thinking about public transport (47%, up from 42% last quarter) more than roads (31%, down from 34% last quarter). "Other" includes 4% who were thinking of the government role in integration, planning and coordination.



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 March 2011 quarter, the 19% of Australians who said transport in their local area will be worse in one year were thinking about population-related changes (33%, down from 40% last quarter) and roads (29%, similar throughout 2010). "Other" includes 6% thinking of the government role in integration, planning and coordination, and 2% thinking of rebuilding transport after disasters.

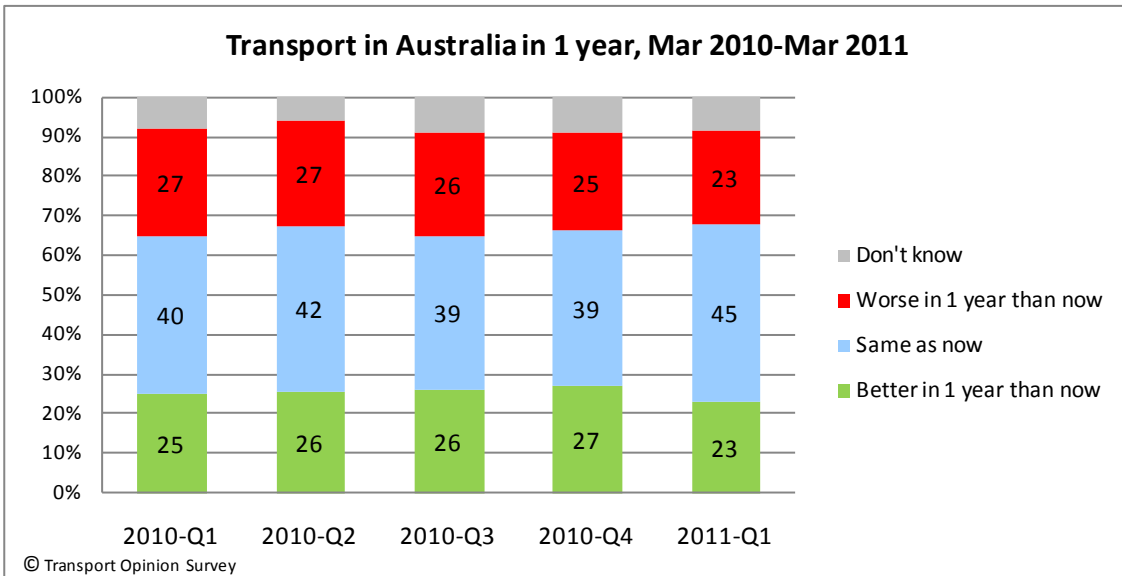


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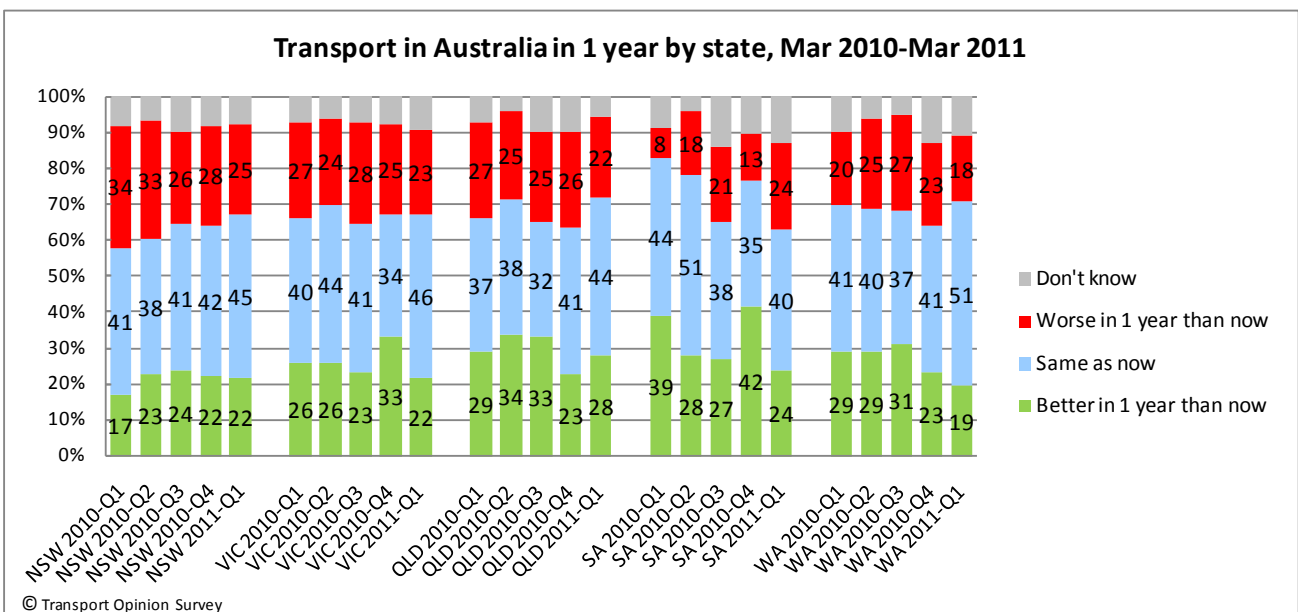
4. Confidence about transport improving in Australia

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?

- In the March 2011 quarter, there was an increase in Australians who think transport in Australia will be the same in one year's time as now (45%, up from 39% last quarter), and a decrease in those who think transport will get worse. This is the most positive quarter of results since the survey started.

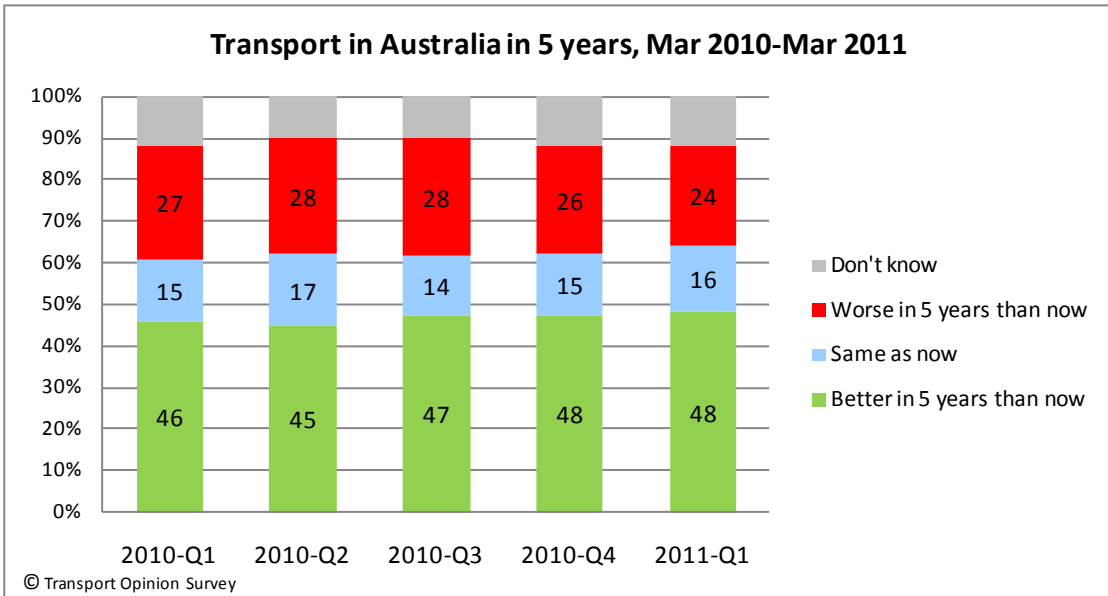


- In every state, there was an increase in residents who think transport in Australia will be the same in one year, and a decrease in residents in every state except SA who think transport will be worse. The optimism of Victorian residents in the previous quarter about transport getting better has returned to the levels of previous surveys.

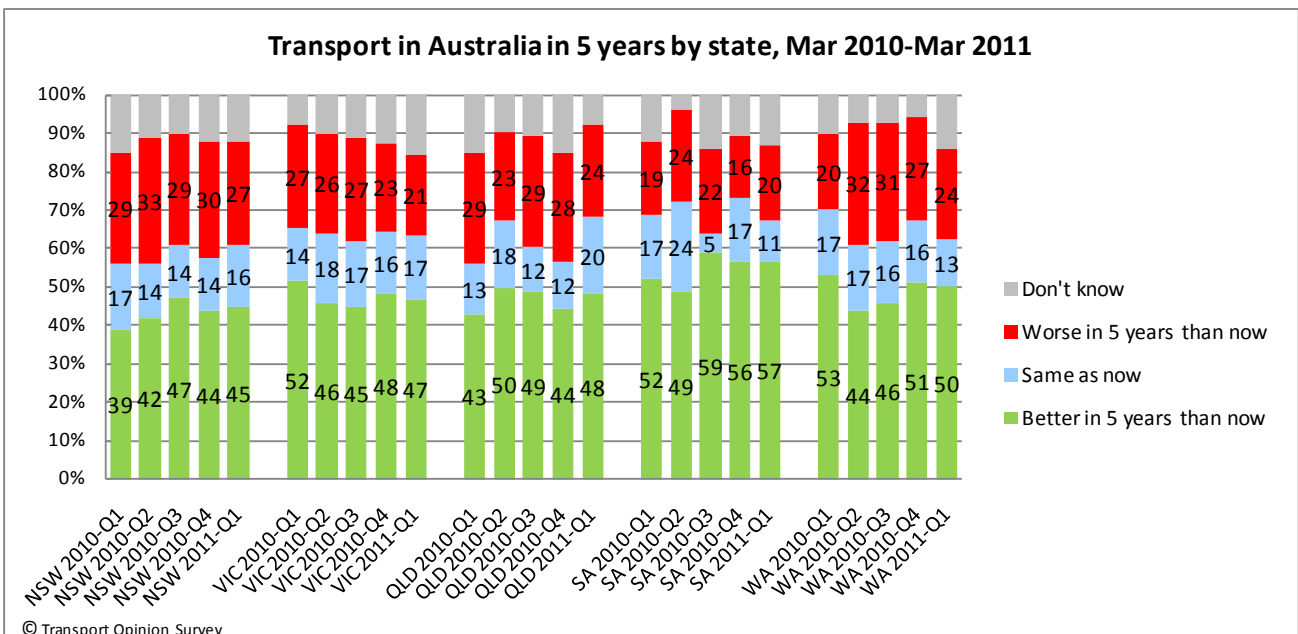


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the March 2011 quarter, Australians remained more confident that transport will be better in five years than in one year, with almost half (48%) thinking transport in Australia will be better in five years.



- In the March 2011 quarter, NSW continued to be the least confident state about transport in Australia, with 45% thinking transport in Australia will be better in five years and 27% thinking transport will be worse. Queensland became more confident, with 48% thinking transport will be better (up from 44% last quarter) and 24% thinking transport will be worse (down from 28% last quarter).



5. Change in confidence over time – TOPS Index

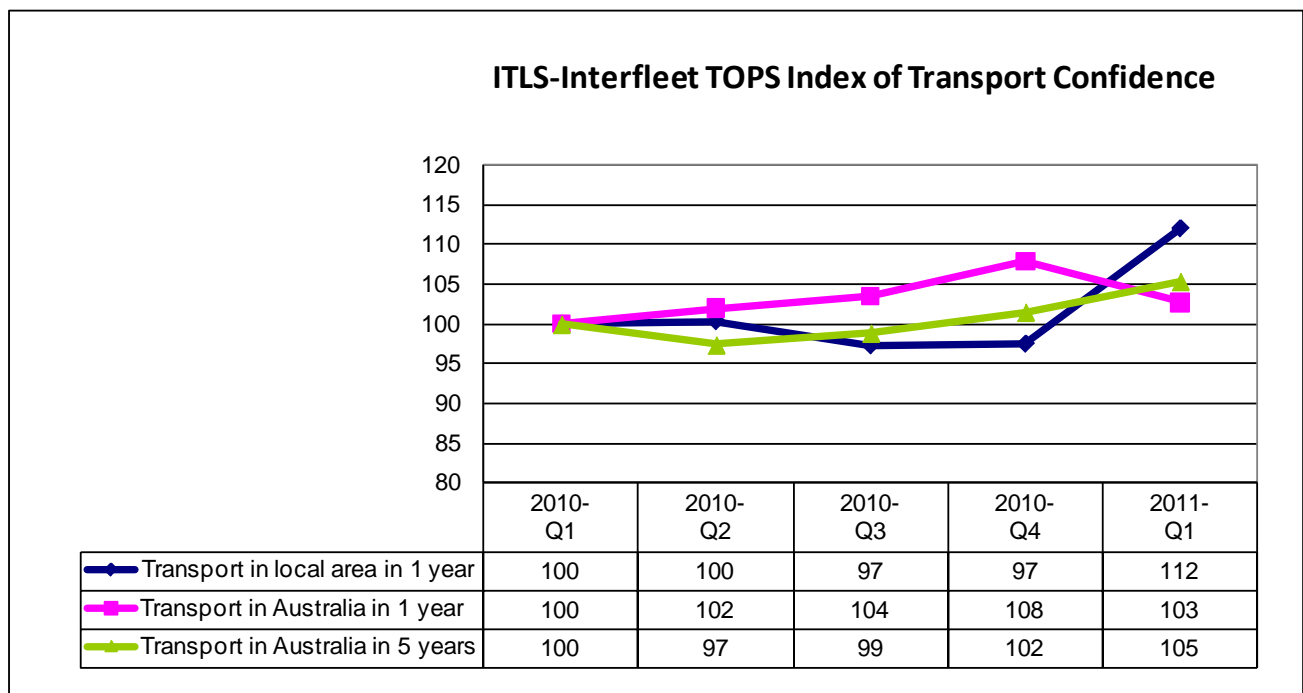
Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in 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 March 2011 quarter compared to the previous quarter:

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

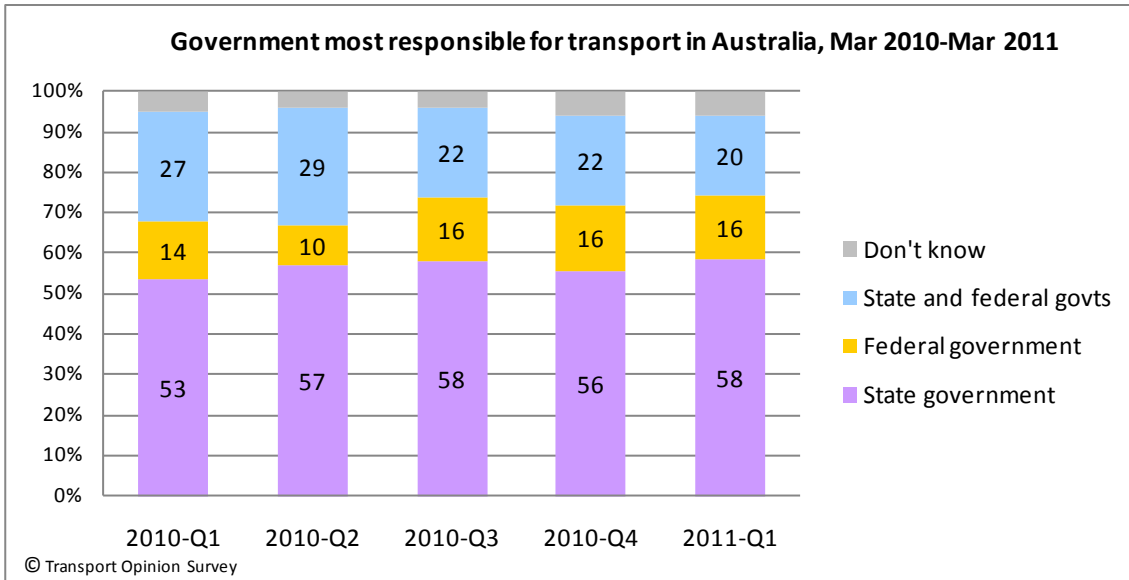
Compared to a year ago in March 2010, Australians are more confident about transport in their local area, more confident about transport in Australia in one year, and more confident about transport in Australia in five years, as all indices are above 100.



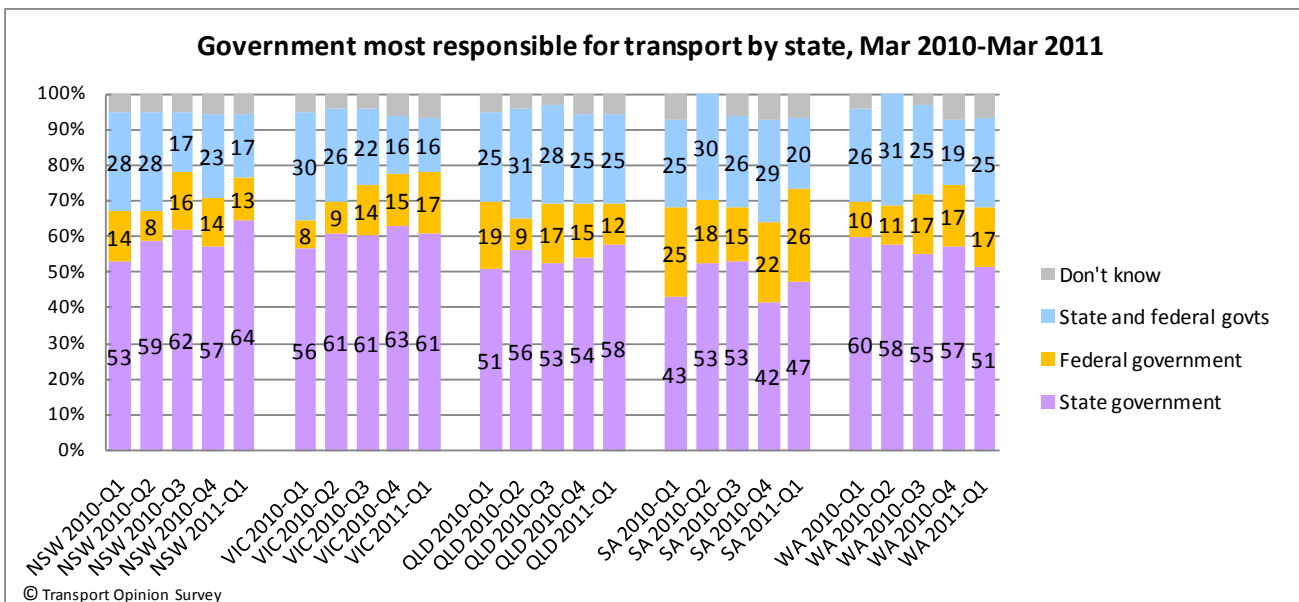
6. Government responsibility for transport

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

- In the March 2011 quarter, 58% of Australians said their state government is most responsible for transport and 16% nominated the Australian federal government as most responsible, similar to the last quarter.



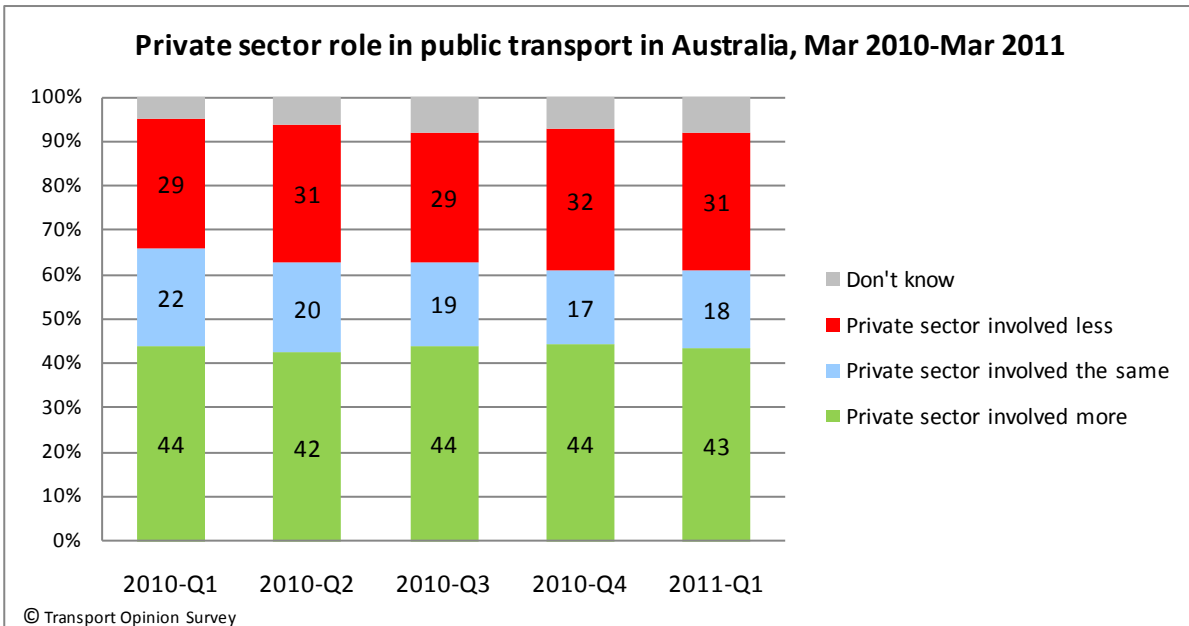
- Of all the states, NSW said their state government is most responsible for transport (64%). The NSW state election on 26 March appears to have focused attention on the state government role in transport, as the Victorian state election did in Victoria last quarter.



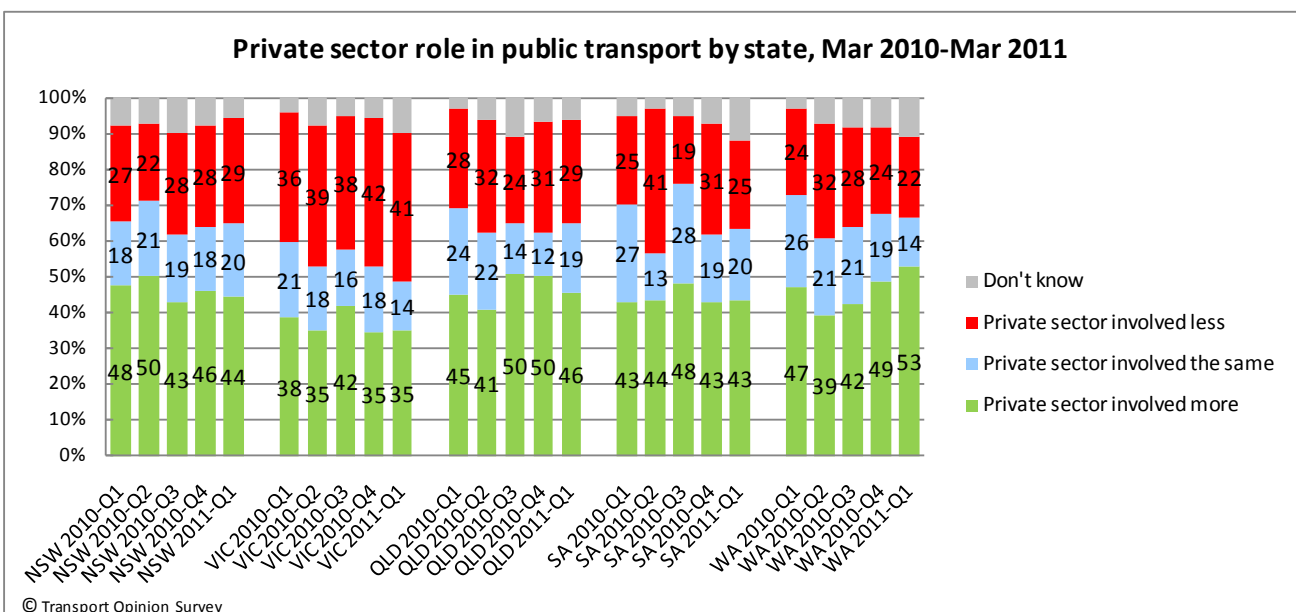
7. Private sector involvement in public transport provision

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

- In the March 2011 quarter, 43% of Australians said the private sector should be involved more in the provision of public transport, while 31% said the private sector should be involved less, similar to the previous quarter.



- In the March 2011 quarter, Victoria continued to be the only state in which more residents supported less private sector involvement in public transport (41%) rather than more involvement (35%). The lead up to the NSW state election on 26 March, in which a change of government is expected, does not appear to have changed NSW views.



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.

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 (formerly Faculty of Economics and Business) provides education and conducts research in transport, logistics and supply chain management.

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