

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

Quarter 2, June 2011

Highlights

Transport increasing as highest priority issue

- In the June 2011 quarter, 9% of Australians nominated transport (up from 7% last quarter) and 14% nominated infrastructure as one of the two highest priority issues in Australia today, with transport highest in NSW (12%), Victoria (11%) and Western Australia (10%).

Public transport the highest priority for transport

- Half of Australians (52%) said the highest priority issue for transport in Australia is public transport improvements. Support for public transport continued to be highest in Victoria (64%).

Decline in confidence about transport in local area

- In the June 2011 quarter, Australians became less confident about transport in their local area in one year's time. One in four Australians (24%) said transport in their local area will be worse in one year's time, an increase from the last quarter. The decline in confidence was greatest in Victoria and Western Australia. There was no change in confidence in NSW.

Divergent views about transport in Australia in short-term

- There was an increase in Australians who think transport in Australia will be better in one year's time than now (26%, up from 23% last quarter), but there was also an increase in those who think transport will get worse (26%, up from 23% last quarter). This was mostly due to results in Victoria, where fewer people think transport will be the same as now.

Australians confident about transport in long-term

- Australians continue to be more confident that transport in Australia will be better in five years than in one year, with almost half (47%) thinking transport in Australia will be better in five years.

Government responsibility and private sector role

- 54% of Australians said their state government is most responsible for transport, while over a quarter (27%, up from 20% last quarter) nominated both their state government and the federal government as most responsible for transport.
- 42% of Australians said the private sector should be involved more in the provision of public transport, while 28% said the private sector should be involved less. Victoria continues to be the only state in which residents wanting less private sector involvement in public transport outnumber those who want more involvement.

About the Transport Opinion Survey

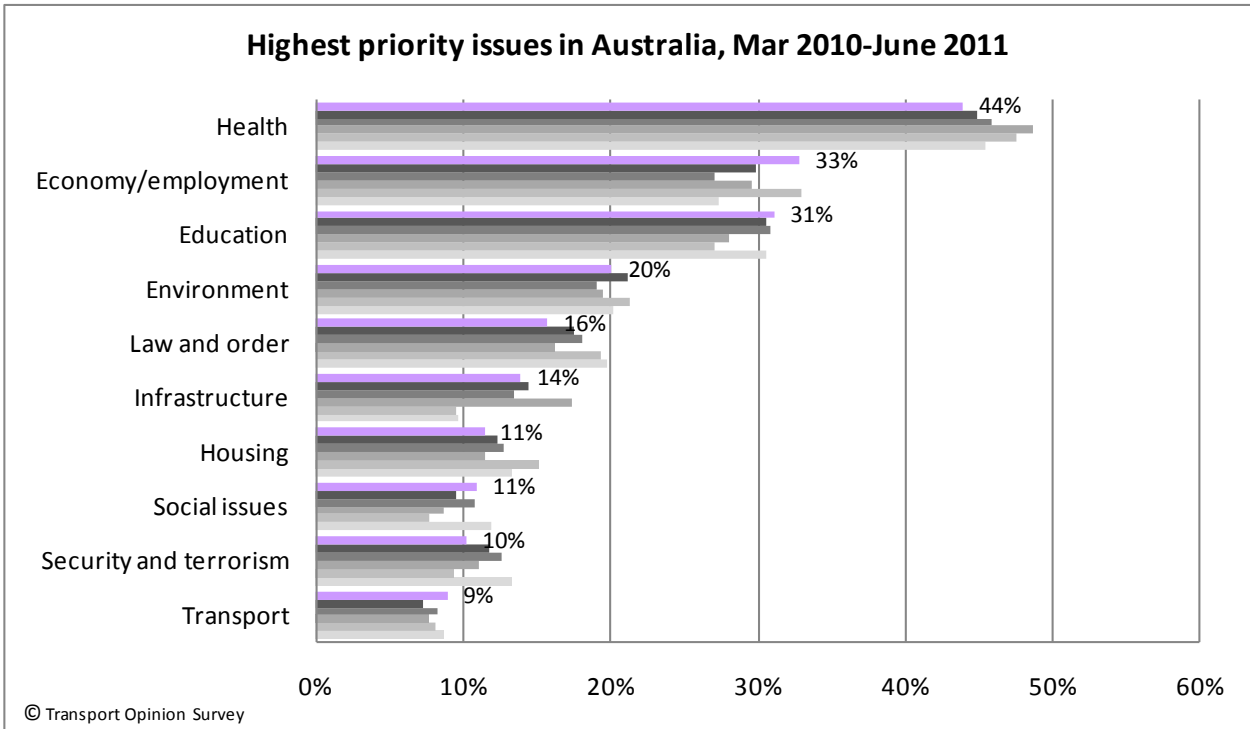
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained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

The Quarter 2, June 2011 survey was conducted over 13-30 May 2011. Current issues in the quarter included debate about the federal government's carbon price, and the federal budget on 10 May 2011.

1. Transport as a national priority

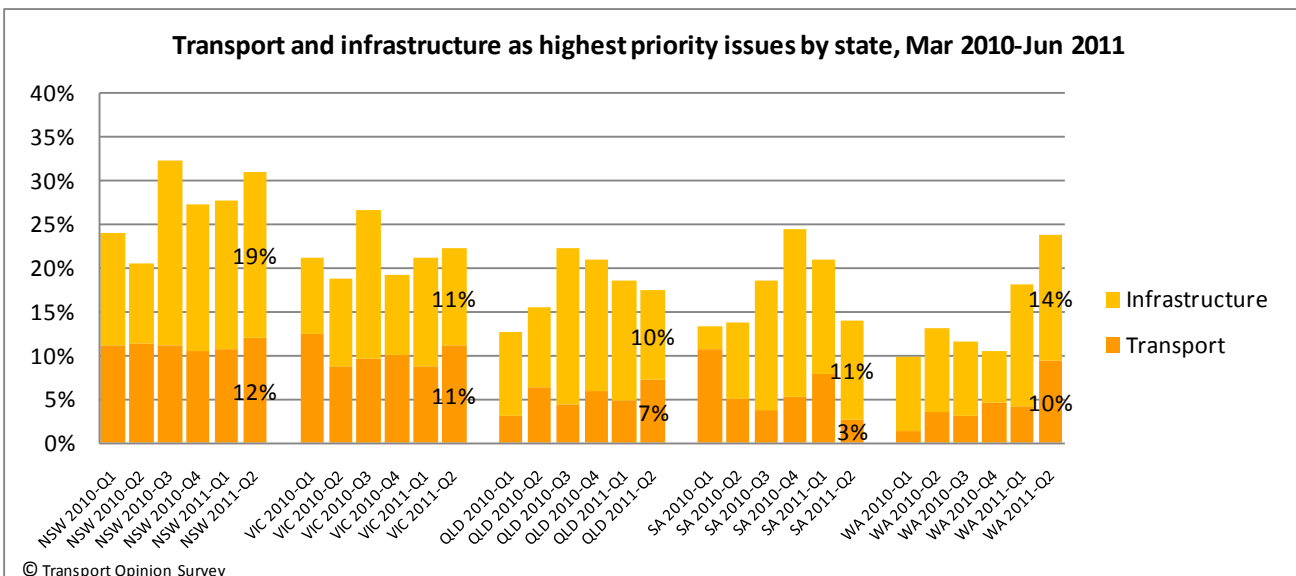
Which two of these issues [from list of 11 issues] do you think are the highest priority in Australia today?

- In the June 2011 quarter, health remained the highest priority issue in Australia today: health was nominated by 44% of Australians as one of the two highest priority issues, followed by economy/employment (33%) and education (31%).
- In the June 2011 quarter, 9% of Australians nominated transport as one of the two highest priority issues in Australia today (up from 7% last quarter), and 14% nominated infrastructure, similar to the previous quarter.



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.

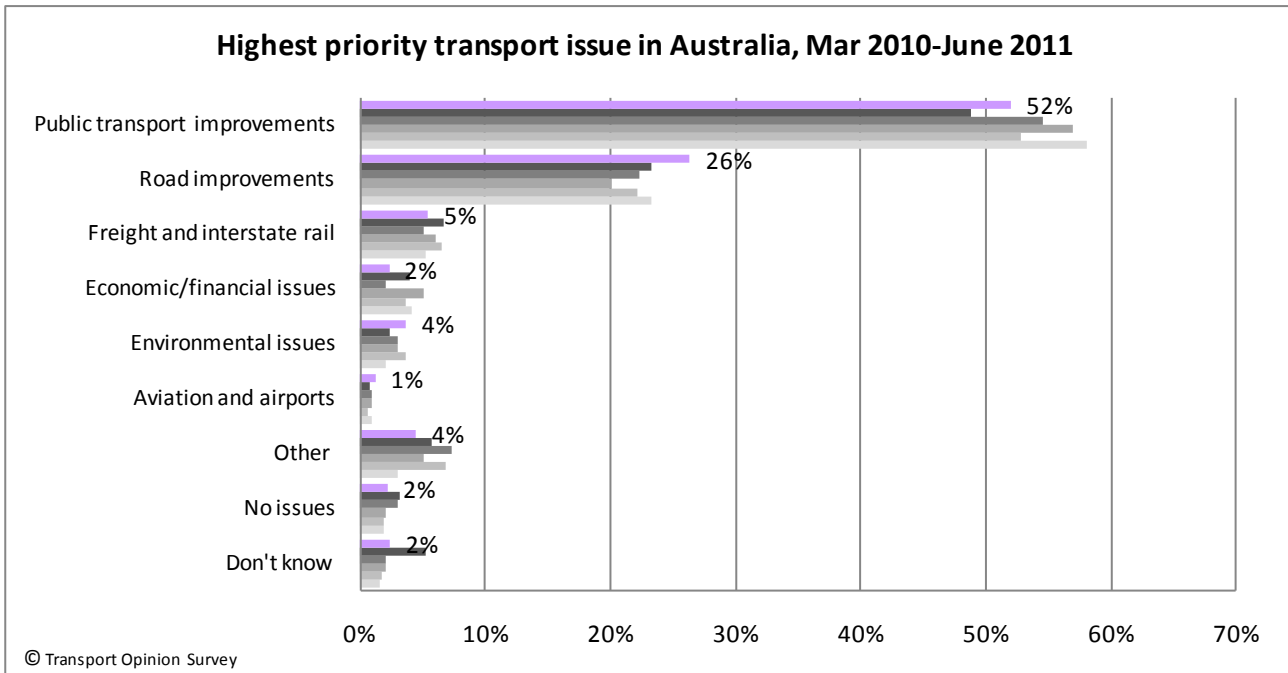
- In the June 2011 quarter, transport remained most important in NSW (12%) and Victoria (11%), but there was a large increase in Western Australia (10%, up from 4% last quarter).



2. Highest priority issue for transport

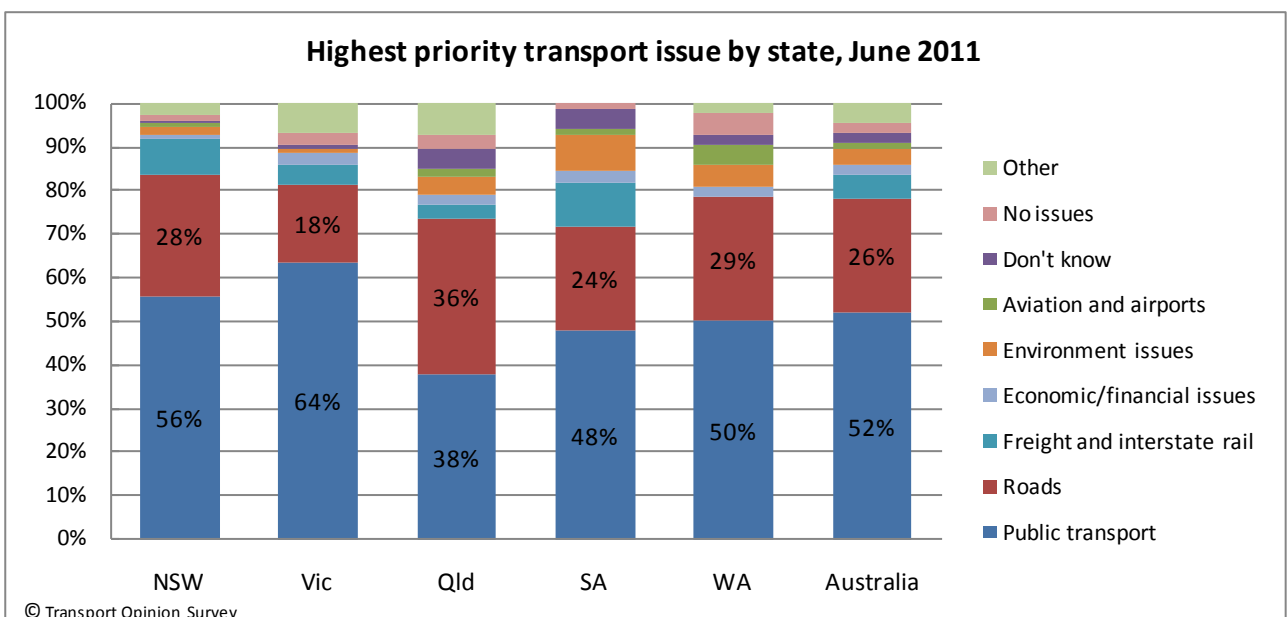
What do you think is the highest priority issue for transport in Australia now?

- In the June 2011 quarter, half of Australians (52%, up from 49% 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. 26% of Australians said road improvements are the highest priority issue in transport.



Note: 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. 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.

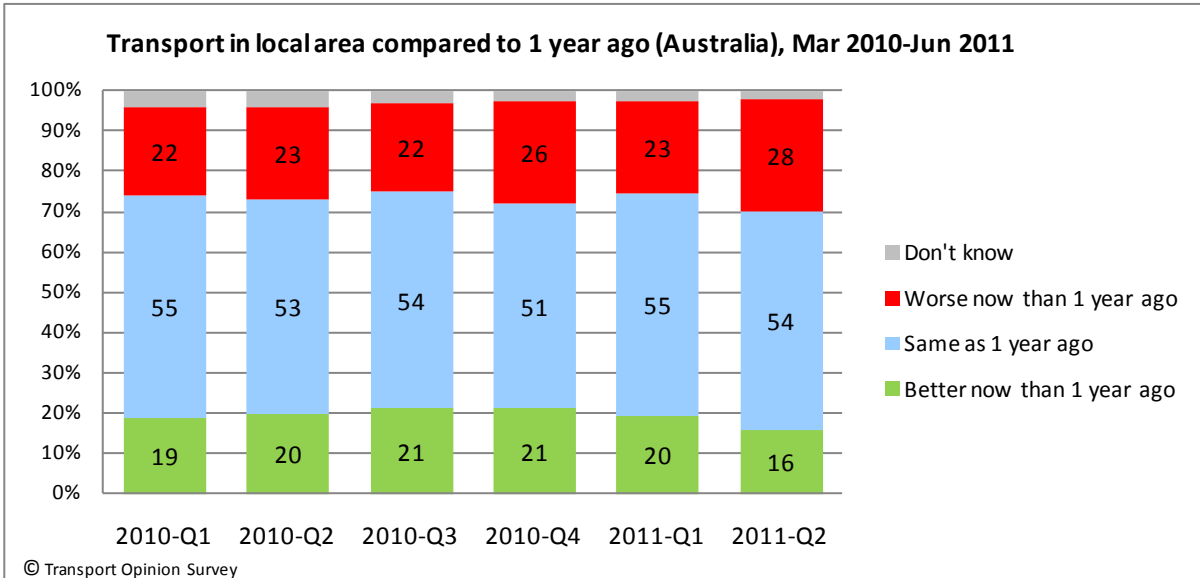
- Public transport improvements was the highest priority issue in transport in every state, as it was in the previous quarter, with the highest support in Victoria (64%). Queensland was the only state where support for road improvements (36%) was similar to public transport improvements (38%).



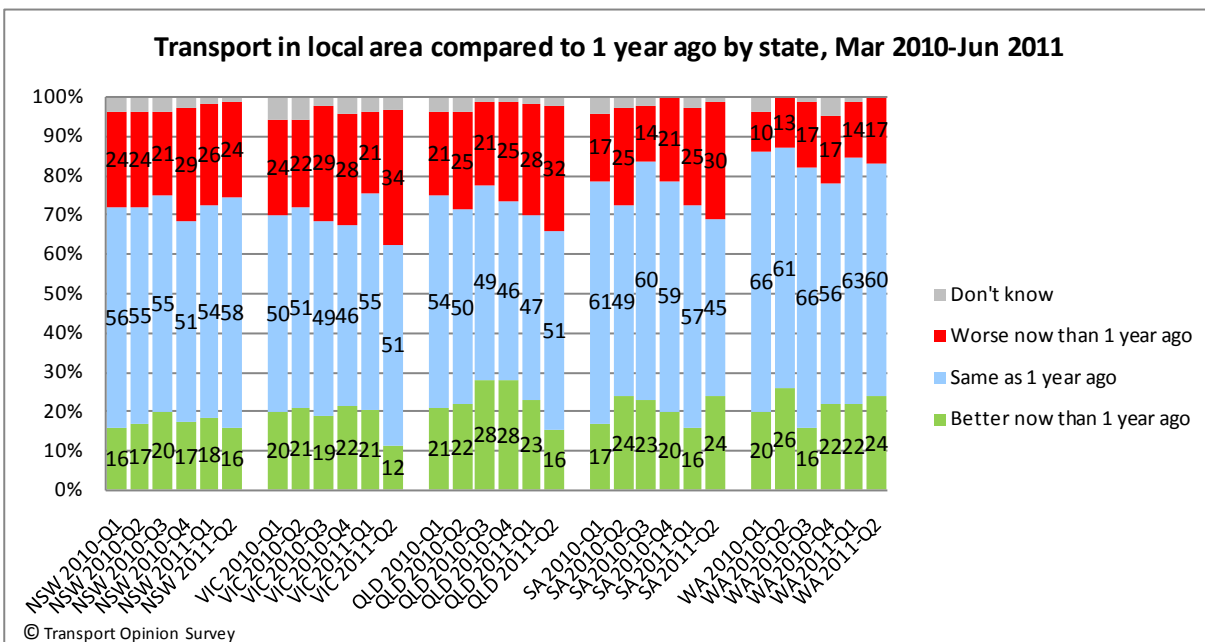
3. Confidence about transport improving in local area

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 June 2011 quarter, there was a decrease in Australians who said transport in their local area was better now than one year ago (16%, down from 20% last quarter), and a corresponding increase in those who said transport was worse now than one year ago (28%, up from 23% last quarter). These are the most negative results in the six quarters of TOPS.

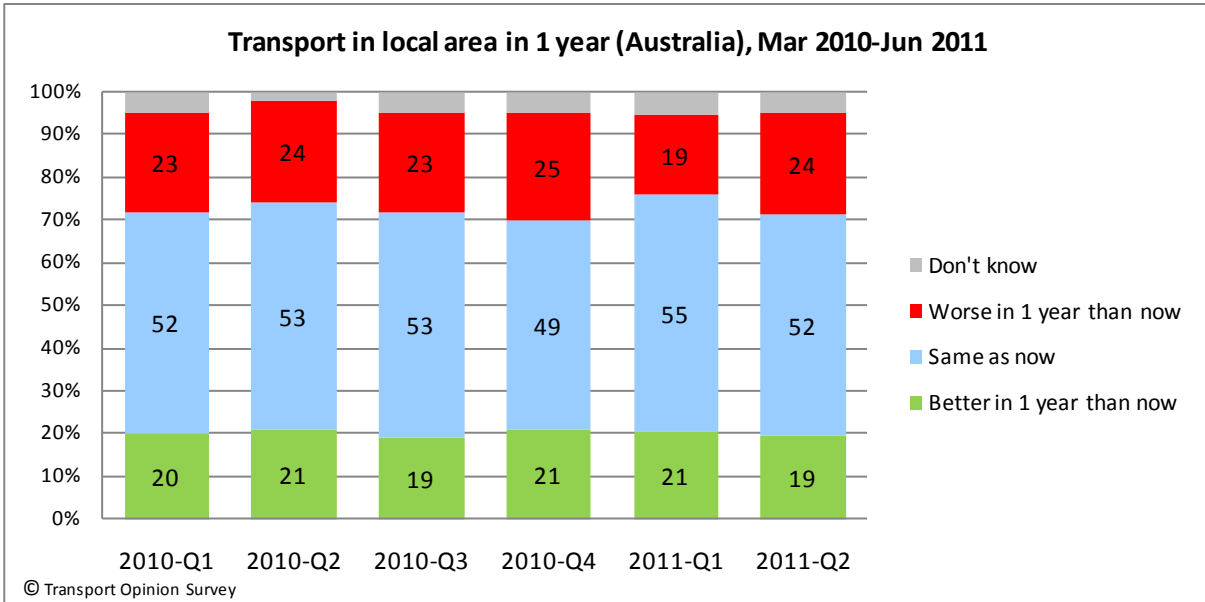


- In the June 2011 quarter, there was a marked decline in confidence in Victoria, with a decrease in residents who said transport in their local area is better than one year ago (down to only 12%) and an increase in residents who said transport is worse than one year ago (34%). Queensland residents also had a decline in confidence about transport in the local area compared to one year ago.

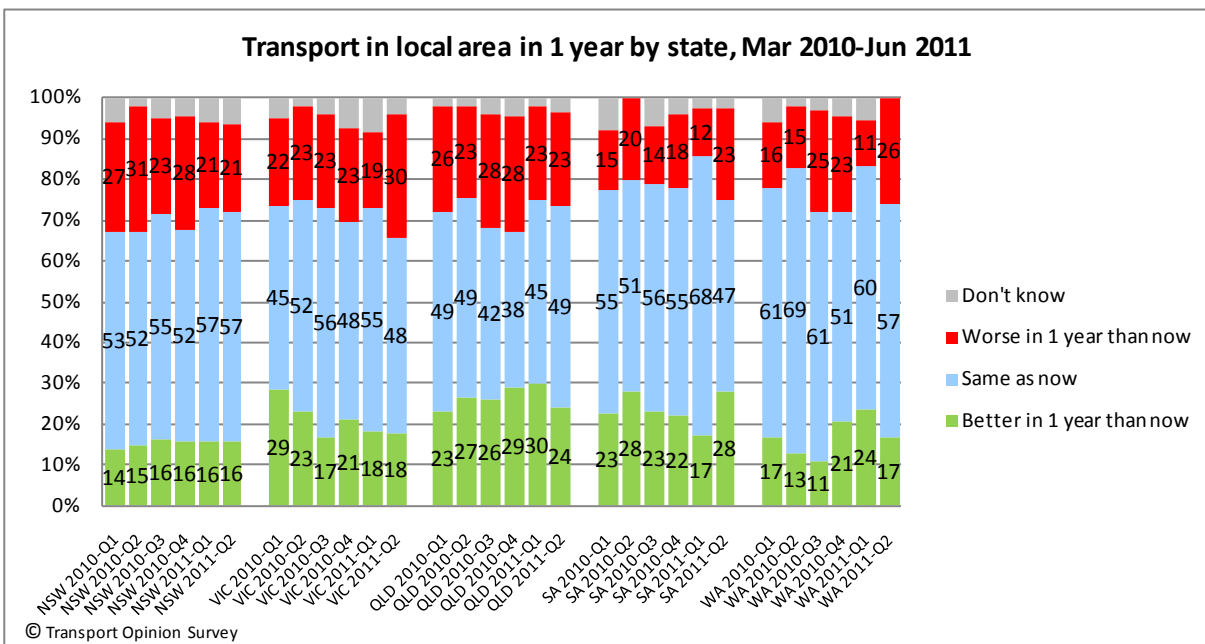


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In the June 2011 quarter, there was an increase in Australians who said transport in their local area will be worse in one year's time (24%, up from 19% last quarter).

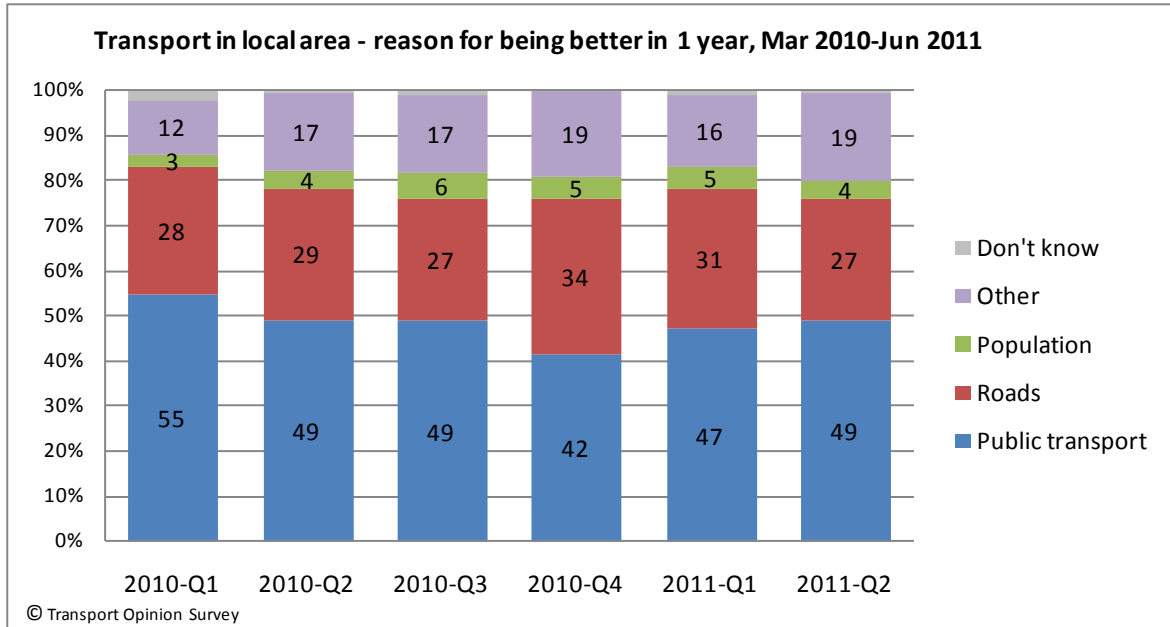


- In the June 2011 quarter, there was a marked increase in Victorian residents who said transport in their local area will be worse in one year (30%, up from 19% last quarter). There was also a decline in confidence in Western Australia about transport in the local area from last quarter. There was no change in confidence in NSW.



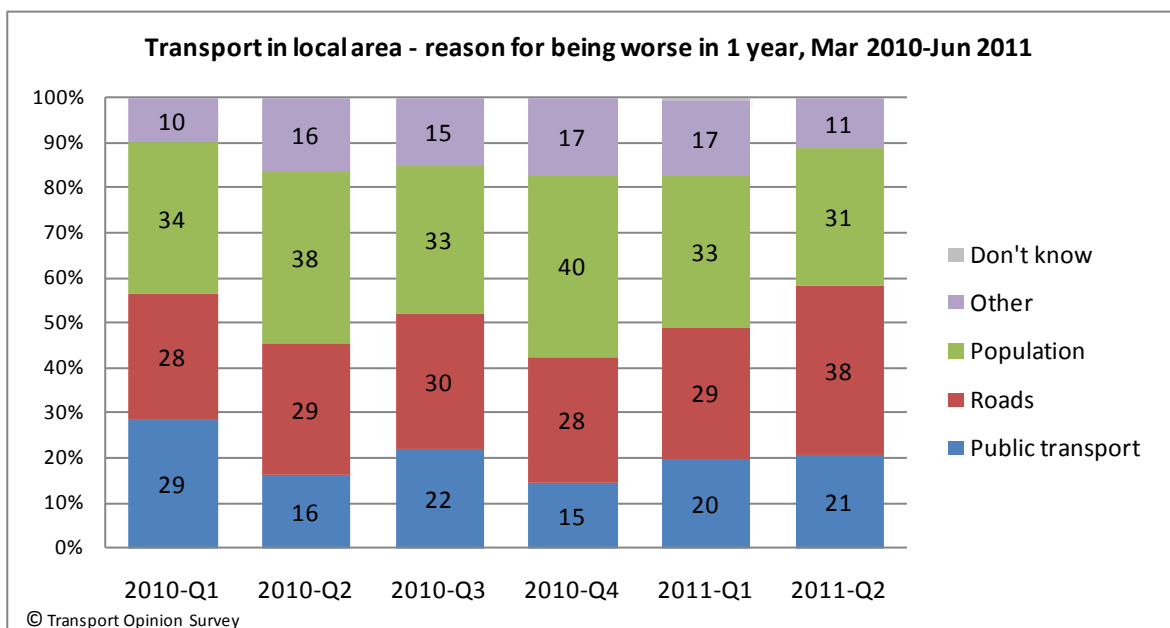
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the June 2011 quarter, the 19% of Australians who said transport in their local area will be better in one year were thinking about public transport (49%, up from 47% last quarter) more than roads (27%, down from 31% last quarter). "Other" includes 13% 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 June 2011 quarter, the 24% of Australians who said transport in their local area will be worse in one year were thinking about roads (38%, up from 29% last quarter) and population-related changes (31%, down from 33% last quarter). "Other" includes 9% thinking of the government role in integration, planning and coordination.

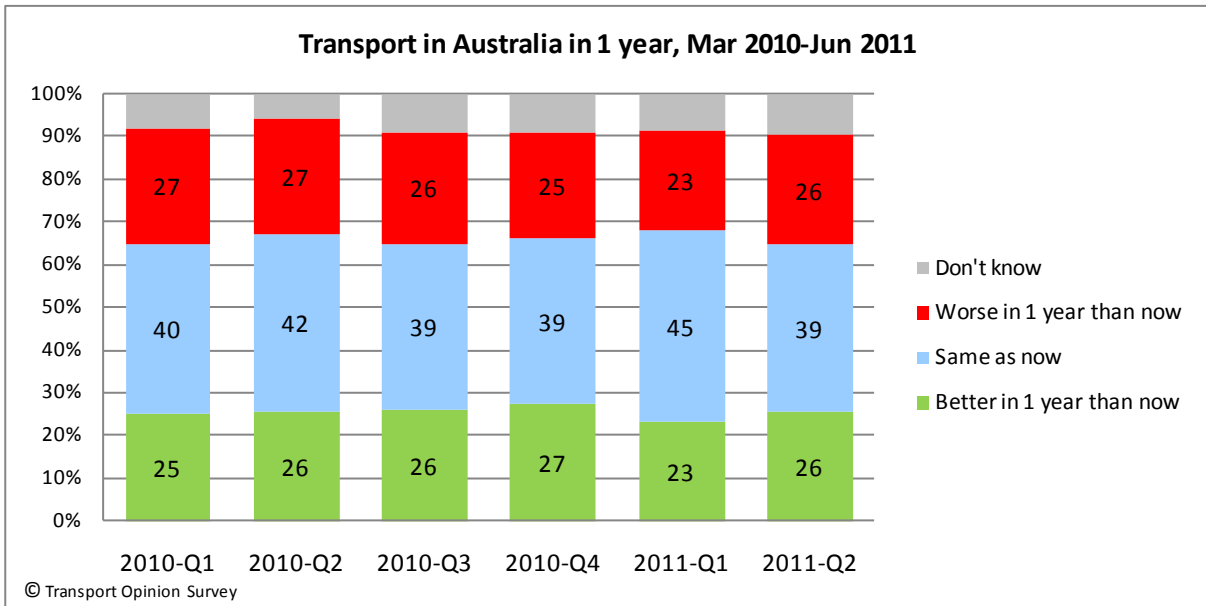


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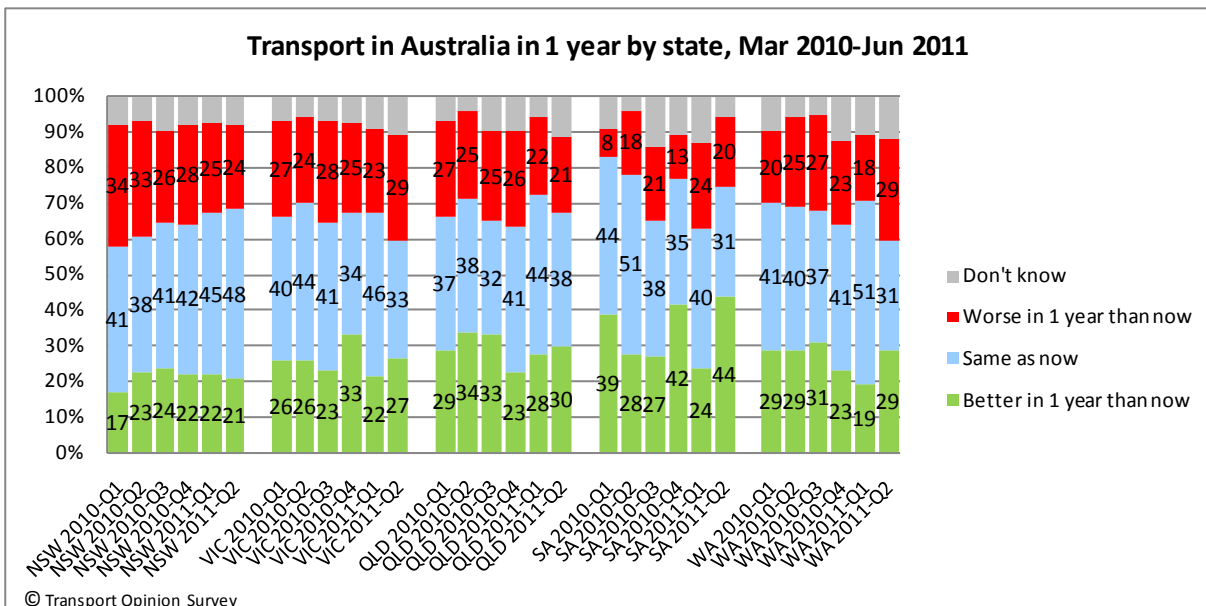
4. Confidence about transport improving in Australia

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 June 2011 quarter, there was an increase in Australians who think transport in Australia will be better in one year's time (26%, up from 23% last quarter), and an increase in those who think transport will get worse (26%, up from 23% last quarter).

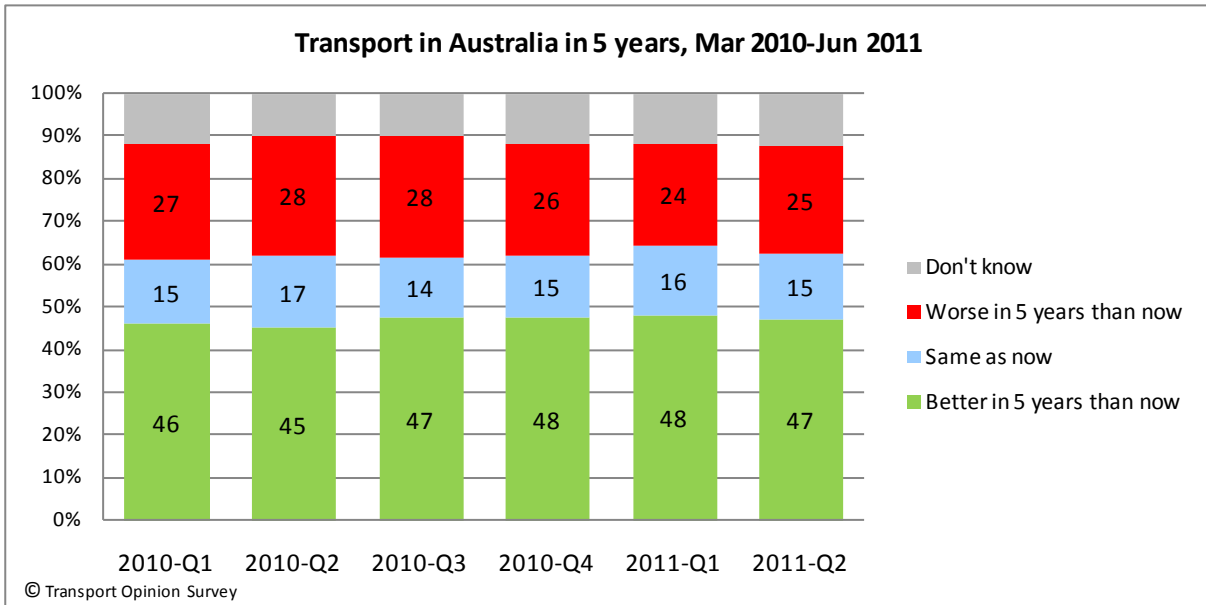


- Views about transport in Australia became more polarised in Victoria and Western Australia, with an increase in residents in both states who think transport in Australia will be better in one year, and also an increase in those who think transport in Australia will be worse in one year.

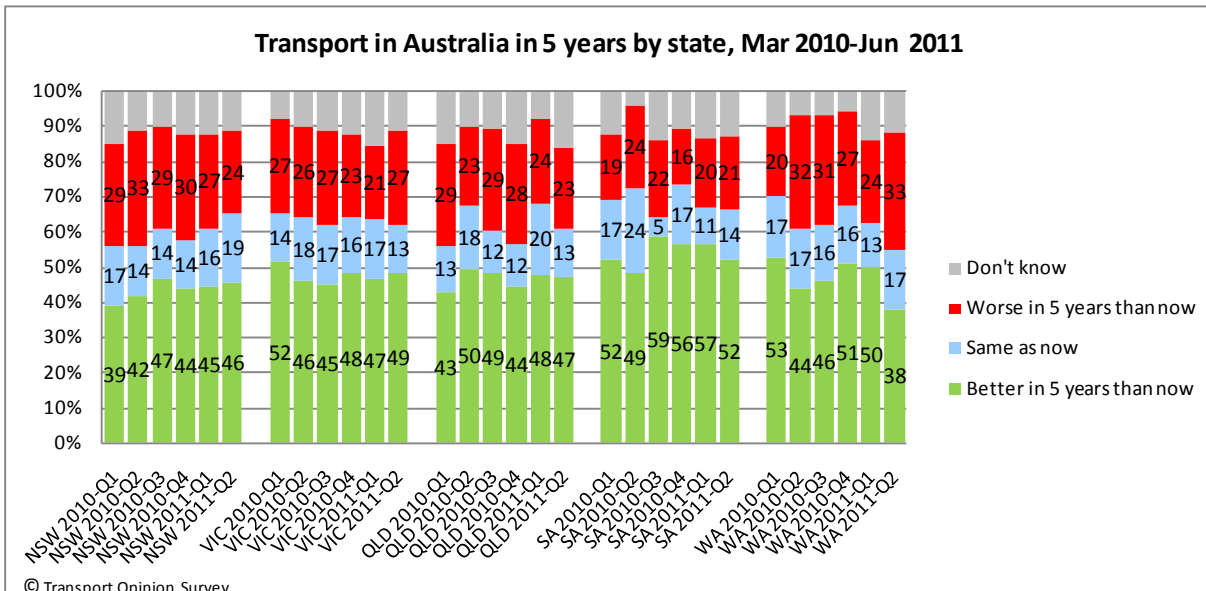


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the June 2011 quarter, Australians remained more confident that transport will be better in five years than in one year, with almost half (47%) thinking transport in Australia will be better in five years.



- In the June 2011 quarter, Western Australia had a marked decline in confidence and is now the least confident state about transport in Australia, with only 38% of WA residents thinking transport in Australia will be better in five years and 33% thinking transport will be worse.



5. Change in confidence over time – TOPS Index

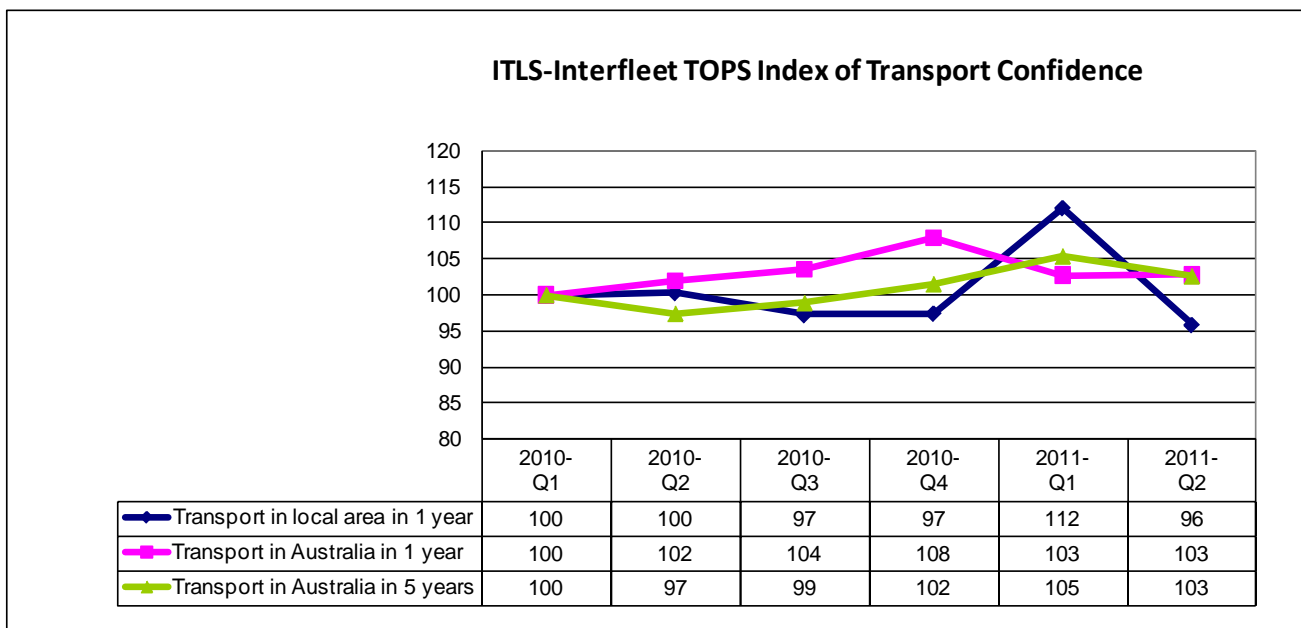
Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in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

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

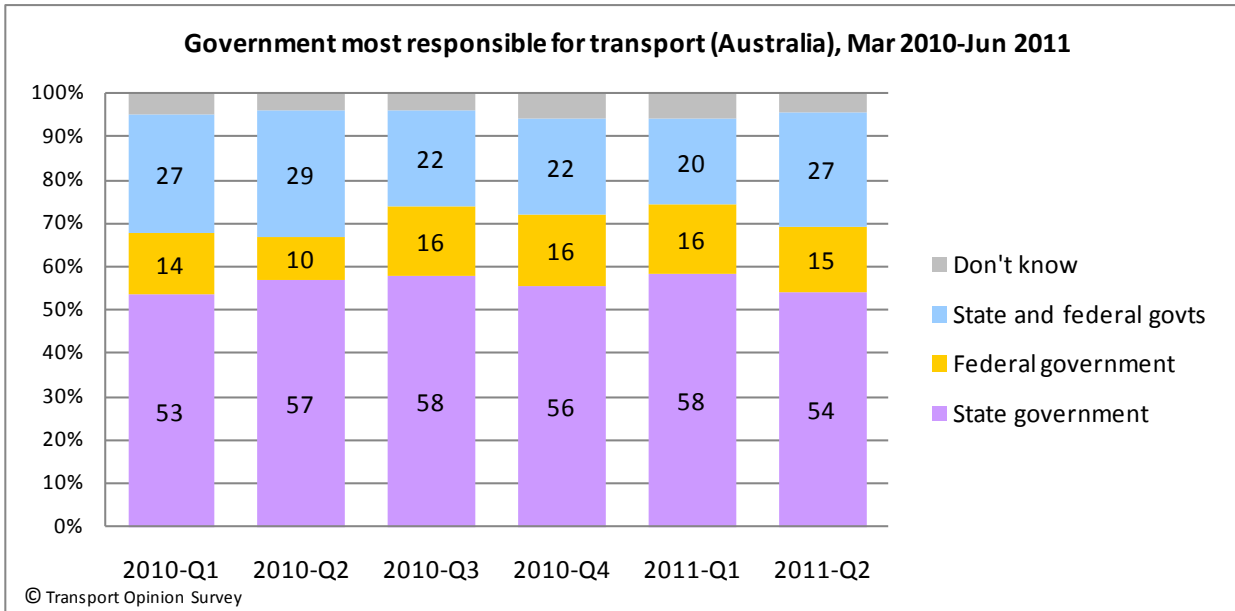
Compared to the launch of TOPS in March 2010, Australians are less confident about transport in their local area, more confident about transport in Australia in one year, and more confident about transport in Australia in five years, as the two Australia indices are above 100.



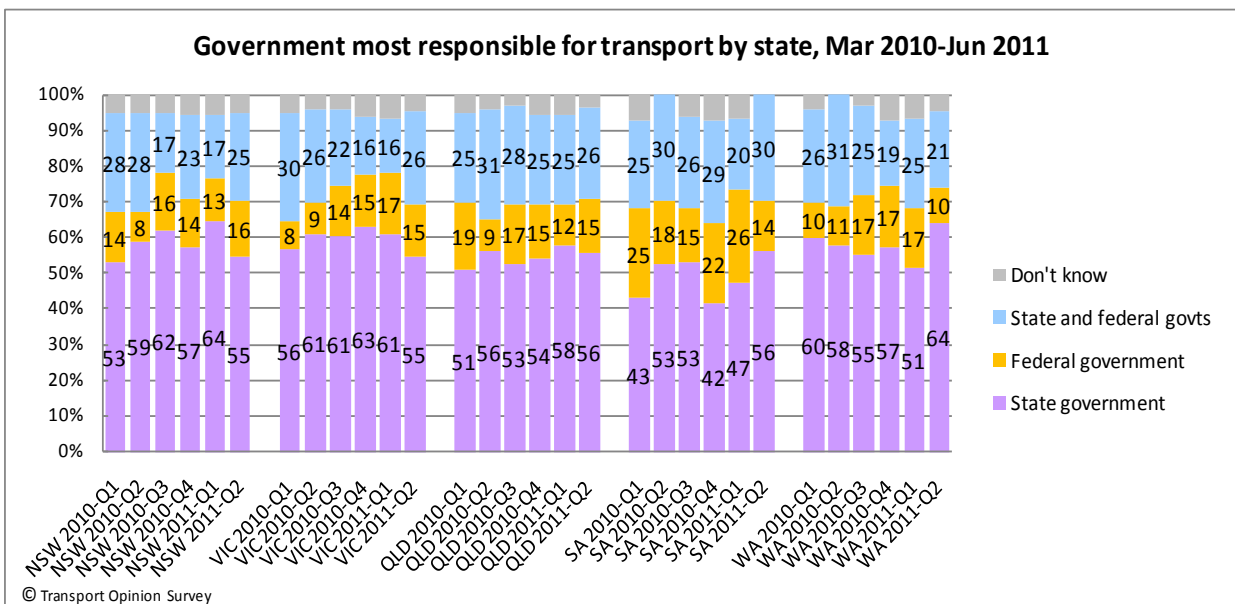
6. Government responsibility for transport

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

- In the June 2011 quarter, 54% of Australians said their state government is most responsible for transport. There was an increase in Australians nominating both the state and federal governments (27%, up from 20% last quarter).



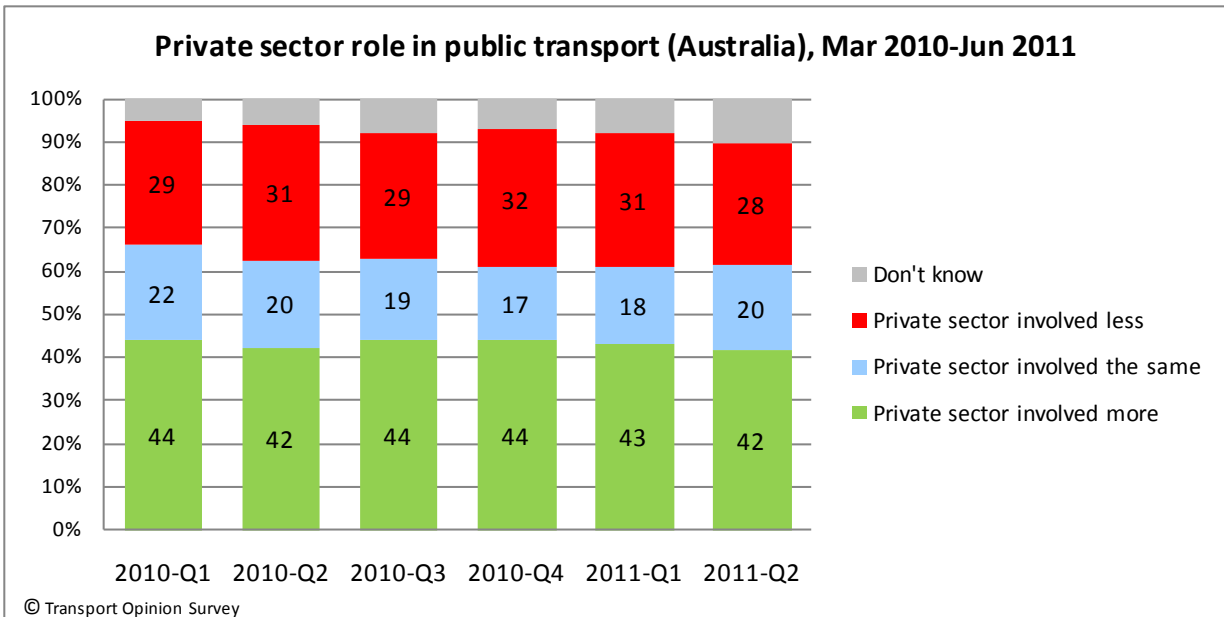
- In the June 2011 quarter, there was a large increase in NSW, Victoria and South Australia residents nominating both the state and federal government as most responsible for transport.



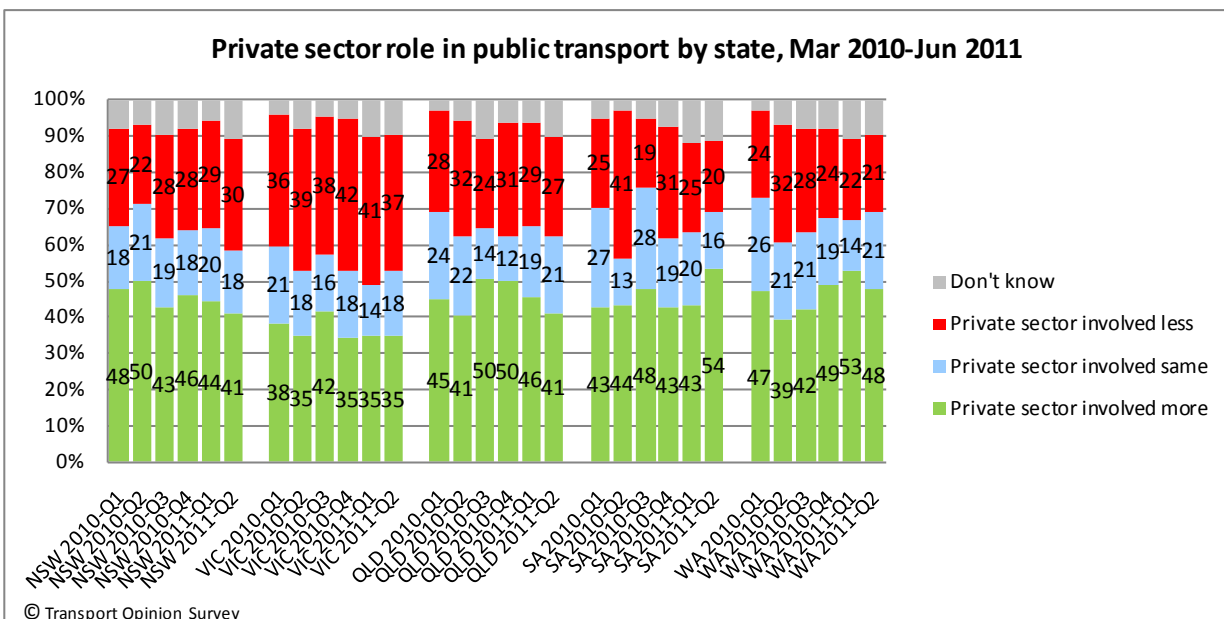
7. Private sector involvement in public transport provision

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 June 2011 quarter, 42% of Australians said the private sector should be involved more in the provision of public transport, while 28% said the private sector should be involved less. There was an increase in the “don't know” response to 10%, double the level at the launch of TOPS.



- In the June 2011 quarter, Victoria continued to be the only state in which more residents supported less private sector involvement in public transport (37%) rather than more involvement (35%).



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.

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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