

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

Quarter 3, September 2010

Highlights

- In the September 2010 quarter, one in four Australians nominated either transport (8%) or infrastructure (17%) as one of the two highest priority issues in Australia today. The large increase in infrastructure, up from 10% last quarter, likely reflects the focus on the National Broadband Network during the federal election campaign.
- Over half of Australians (57%) said the highest priority issue for transport in Australia is public transport improvements, almost three times more than those who said road improvements were the highest transport priority (20%).
- One in five Australians (21%) think transport in their local area improved in the last year, similar to the previous quarter.
- One in five Australians (19%) think transport in their local area will be better in one year's time, with about half thinking it will be unchanged.
- A quarter of Australians (26%) think transport in Australia will be better in one year's time than now, while the same (26%) think it will be worse, similar to the previous quarter. NSW residents, who were clearly the least confident about transport in Australia improving in the last quarter, are now more confident. Victorians are now the least confident state, with 28% believing transport in Australia in one year's time will be worse than now.
- Australians are 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, similar to the previous quarter. NSW residents became more confident about transport in Australia in five years, while Queensland residents became less confident. SA residents were clearly the most confident of the states that transport in Australia will be better in five years.
- The TOPS Index shows that in the September 2010 quarter Australians were slightly more confident about both transport in Australia in one year's time and transport in Australia in five years, compared to the previous quarter.
- 58% of Australians think their state government is most responsible for transport. There was an increase in Australians nominating the federal government as most responsible (16%, up from 10%), likely reflecting transport announcements during the federal election campaign in NSW and Queensland.
- 44% of Australians think the private sector should be involved more in the provision of public transport, while 29% think the private sector should be involved less. In all states, more residents want more private sector involvement in public transport, rather than less involvement.

About the Transport Opinion Survey

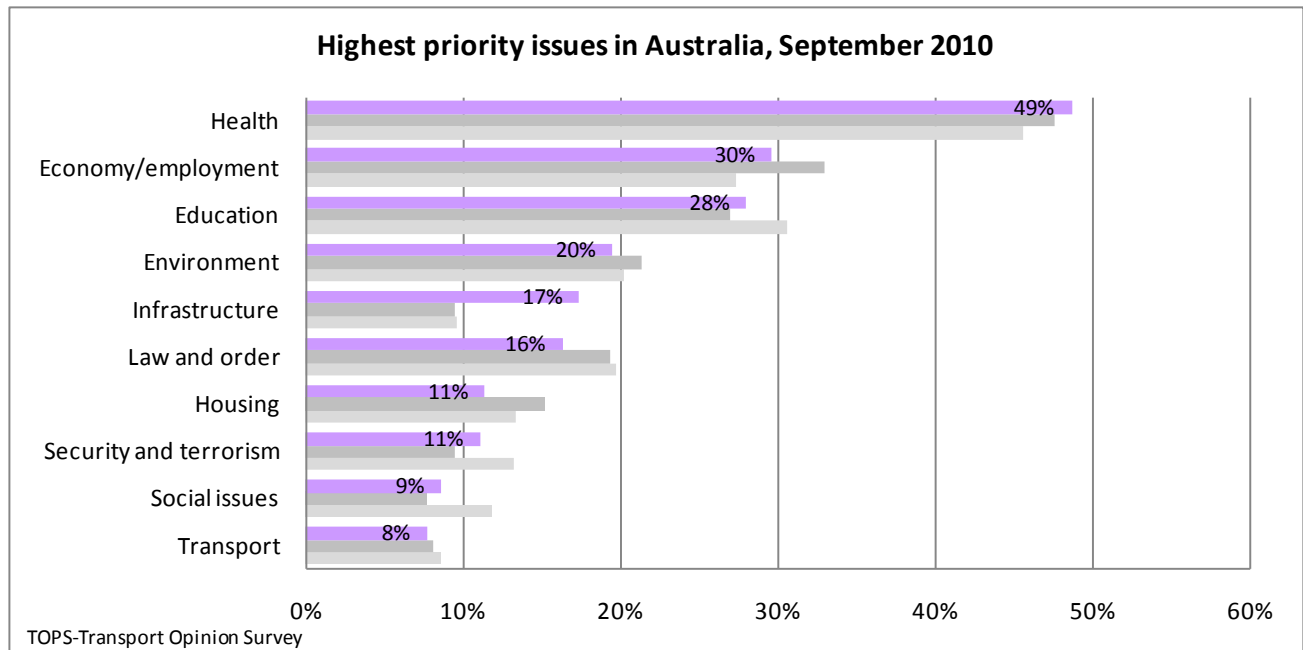
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained interviewers.

The Quarter 3, September 2010 survey was conducted over 23 August-5 September 2010 in the two weeks immediately after the federal election on 21 August 2010. Current issues in the quarter included transport commitments as part of the federal election campaign and issues during the fieldwork included the uncertain federal election outcome after the election on 21 August 2010.

1. Transport as a national priority

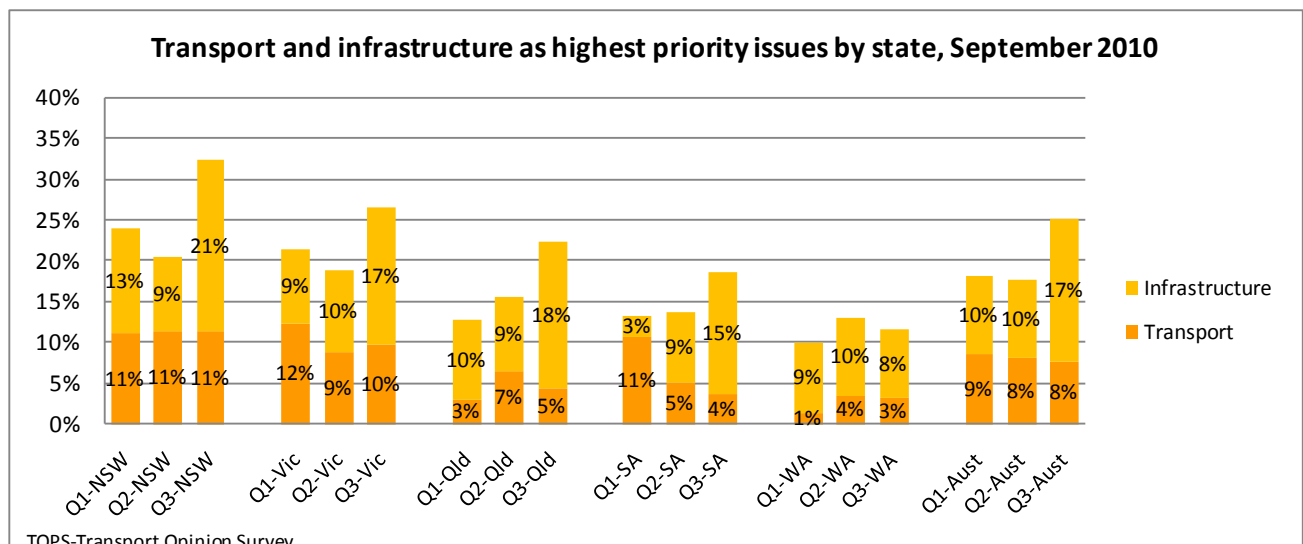
Which two of these issues [from list of 11 issues] do you think are the highest priority in Australia today?

- In the September 2010 quarter, health remained the highest priority issue in Australia today: health was nominated by 49% of Australians as one of the two highest priority issues, followed by economy/employment (30%) and education (28%).
- In the September 2010 quarter, there was a large increase in infrastructure (17%) as one of the two highest priority issues in Australia today, compared to the previous quarter, likely reflecting the National Broadband Network issue during the election campaign. 8% of Australians nominated transport as one of the two highest priority issues, similar to previous quarters.



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

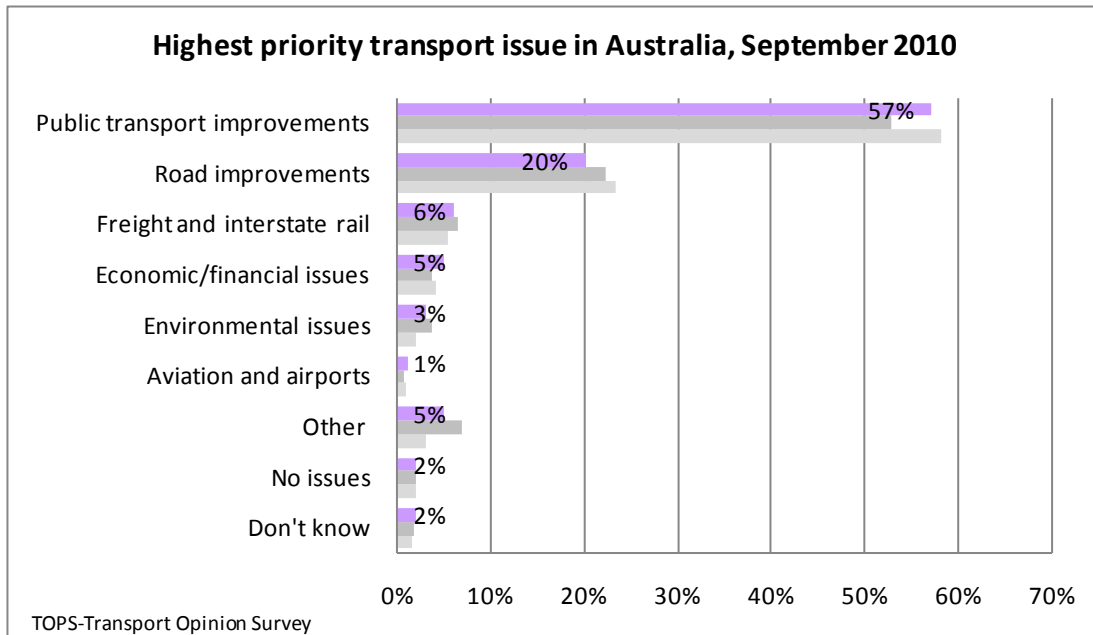
- In the September 2010 quarter, infrastructure increased as a highest priority issue for NSW, Victorian and Queensland residents. There was little change in transport as a priority issue by state. Transport remained as a higher priority issue for NSW and Victorian residents than for other states. Almost one in three NSW residents nominated infrastructure or transport as one of the two highest priority issues in Australia today.



2. Highest priority issue for transport

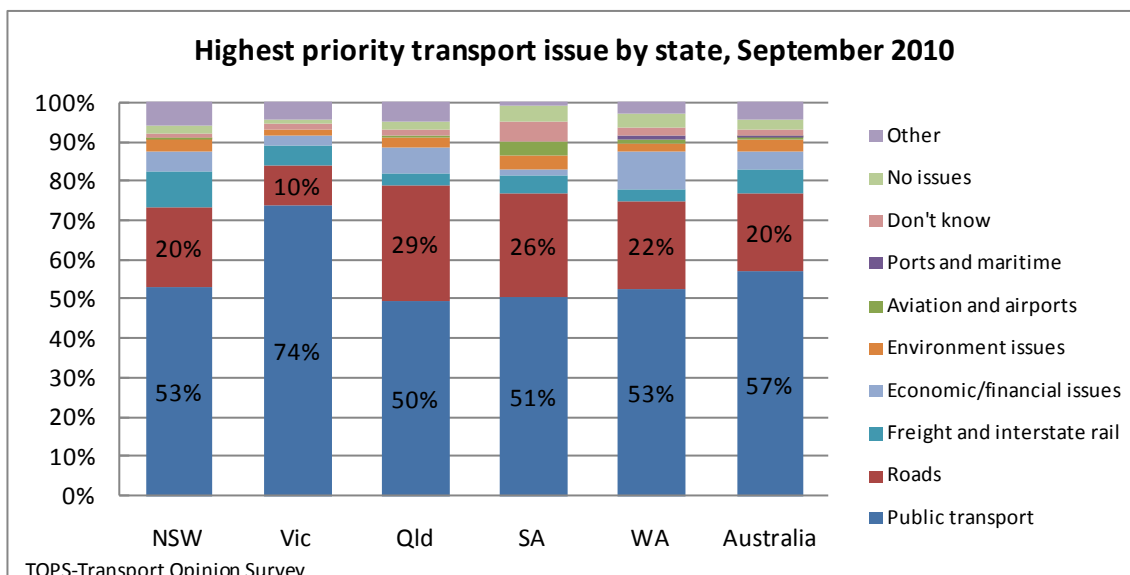
What do you think is the highest priority issue for transport in Australia now?

- In the September 2010 quarter, over half of Australians (57%) said the highest priority issue for transport in Australia is public transport improvements, which is a slight increase compared to the previous quarter. One in five Australians (20%) said road improvements are the highest priority issue in transport.



Note: Responses were grouped into the above categories. Responses sum to 100%. Previous quarter (March and June 2010) results in grey. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

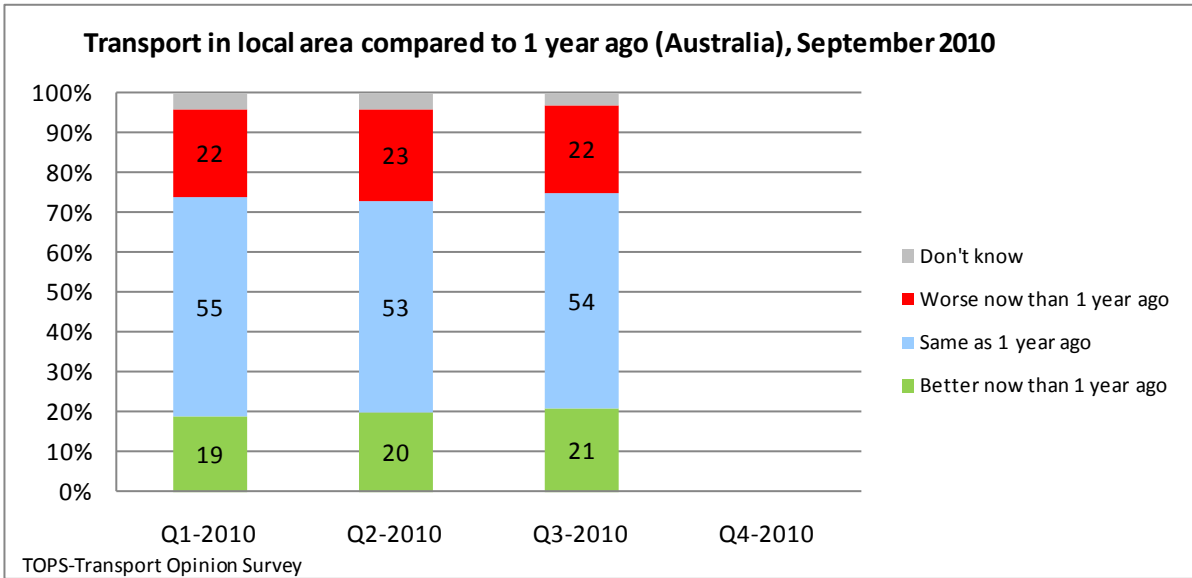
- Public transport improvements was the highest priority issue in transport in every state, as it was in the previous quarter. Almost three-quarters of Victorians (74%) nominated public transport improvements as the highest priority issue in transport. Road improvements received the highest support (29%) as the highest priority issue in transport in Queensland.



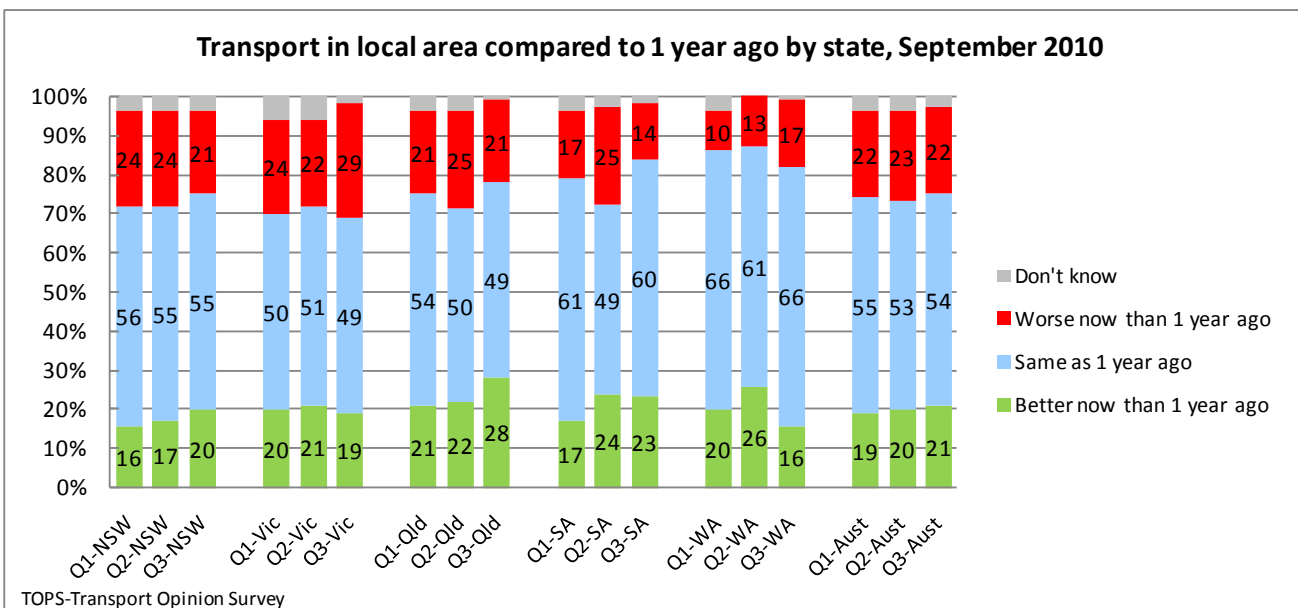
3. Confidence about transport improving in local area

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 September 2010 quarter, one in five Australians (21%) said transport in their local area improved in the last year, similar to the previous quarter.

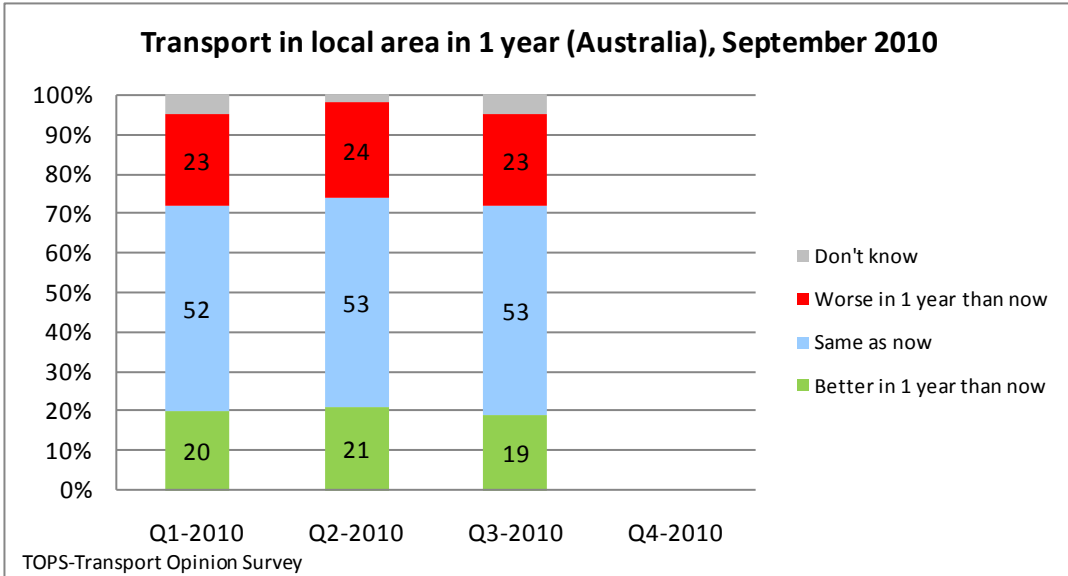


- In the September 2010 quarter, there was an increase in Victorian residents who said transport is worse now than one year ago (29%, up from 22% last quarter). In contrast, there was an increase in Queensland residents who said transport in their local area is better than one year ago (28%, up from 22% last quarter) and in NSW residents (20%, up from 17%). WA and SA residents were most likely to say transport now is the same as one year ago. There was a decrease in SA residents who said transport in their local area is worse than one year ago (14%, down from 25% last quarter).

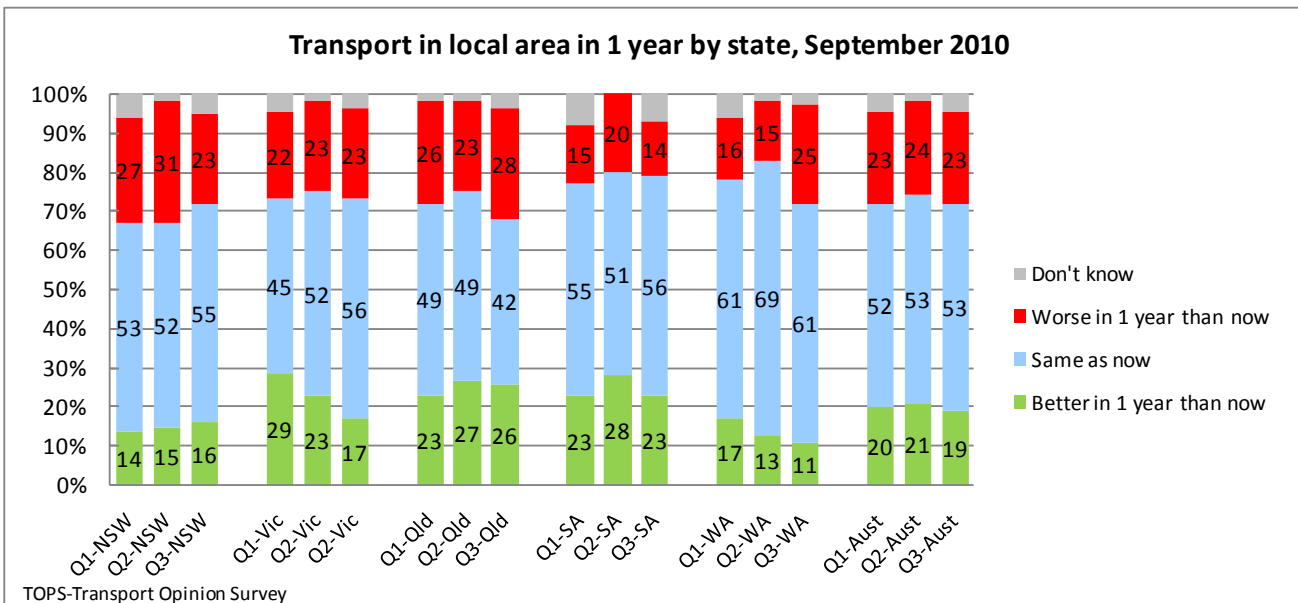


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In the September 2010 quarter, one in five Australians (19%) think transport in their local area will be better in one year's time, with about half thinking it will be the same as now, similar to previous quarters.

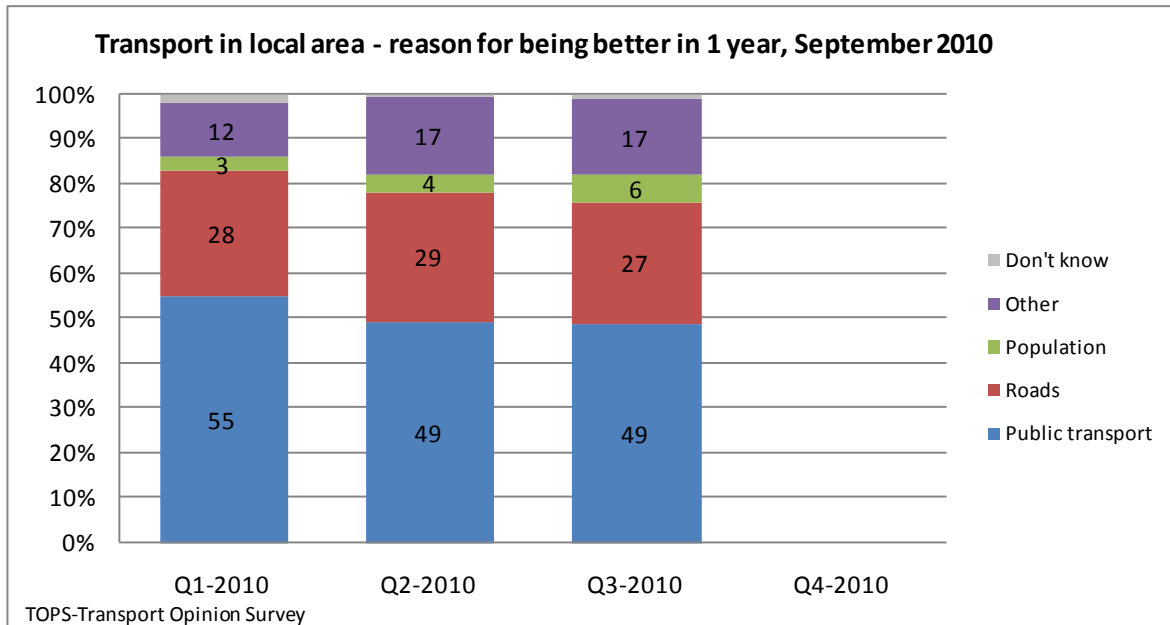


- In the September 2010 quarter, there were changes by state. NSW residents were more confident than last quarter, with 23% (down from 31% last quarter) saying transport in their local area will get worse, similar to Victoria. Victorian residents became less confident about transport in their local area being better (17%, down from 23% last quarter). Queensland and WA residents became less confident about their local area with more people saying transport will be worse in one year: 28% in Queensland (up from 23% last quarter), and 25% in WA (up from 15% last quarter).



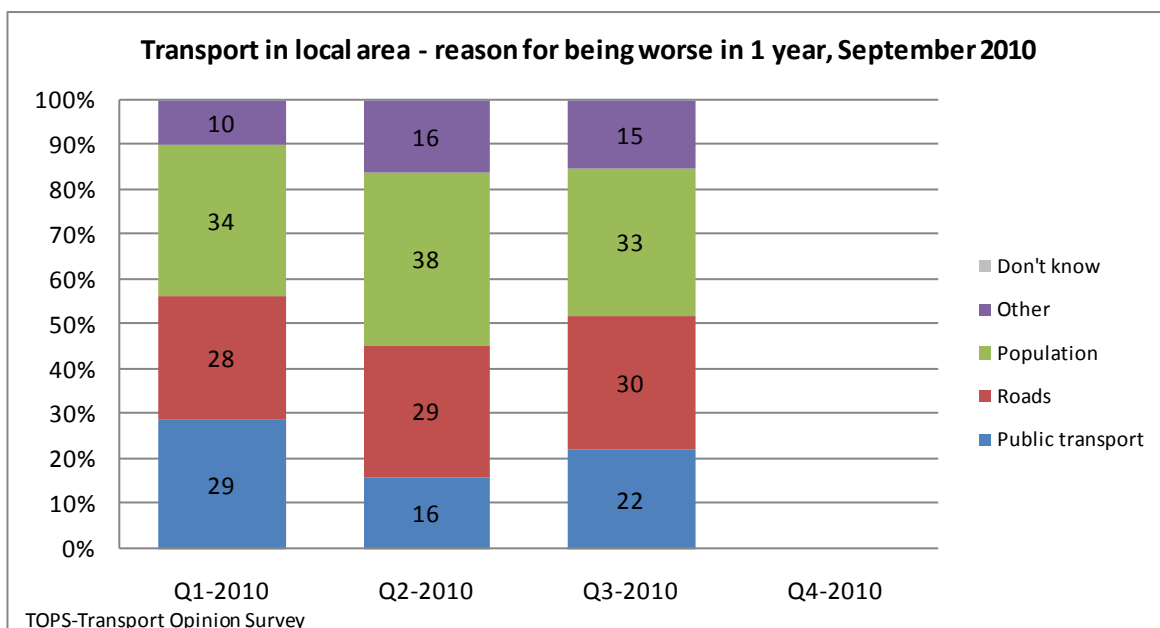
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the September 2010 quarter, the 19% of Australians who think transport in their local area is going to be better in one year were more likely to be thinking about public transport (49%) than roads (27%), which is similar to the previous quarter.



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 2010 quarter, the 23% of Australians who think transport in their local area is going to get worse in one year were thinking about population-related changes (33%) and roads (30%). There was an increase in the proportion of people citing public transport (22%, up from 16% last quarter) as a reason for thinking transport in their local area will get worse.

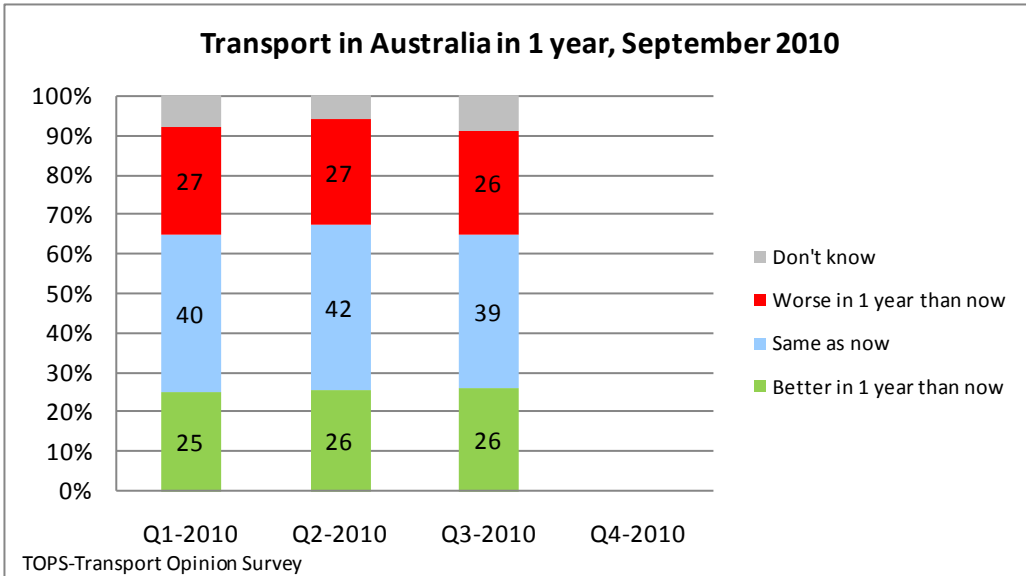


Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

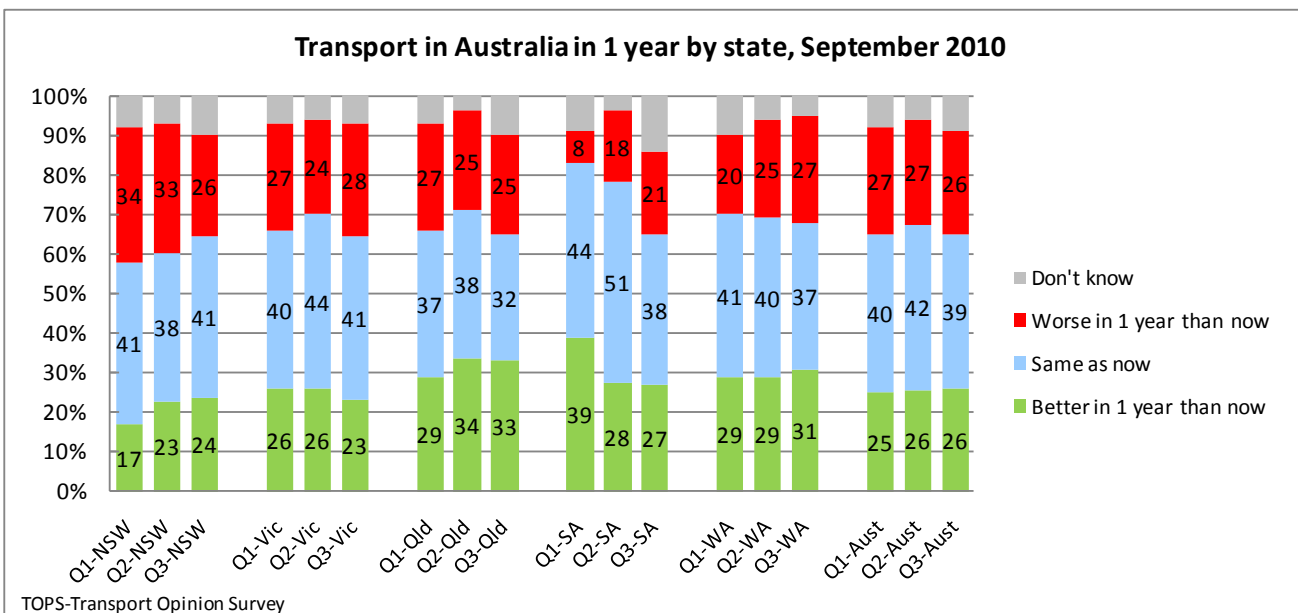
4. Confidence about transport improving in Australia

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 September 2010 quarter, a quarter of Australians (26%) think transport in Australia will be better in one year's time than now, while the same (26%) think it will be worse, similar to the previous quarter. There was an increase in the "don't know" response from 6% to 9%, possibly reflecting the uncertainty of the federal election outcome.

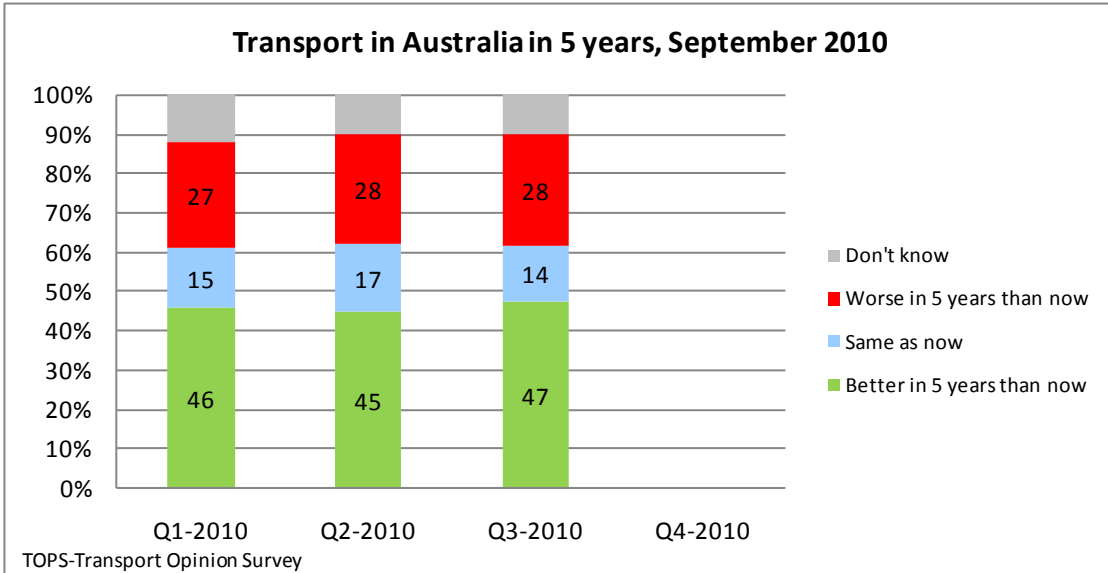


- There were variations by state. NSW residents, who were clearly the least confident about transport in Australia improving in the last two quarters, are now more confident, with 26% thinking transport in Australia will be worse in one year, down from 33% last quarter. Victorians are now the least confident state, with 28% believing transport in Australia will be worse in one year. South Australian residents were the most uncertain, with a "don't know" response of 14%.

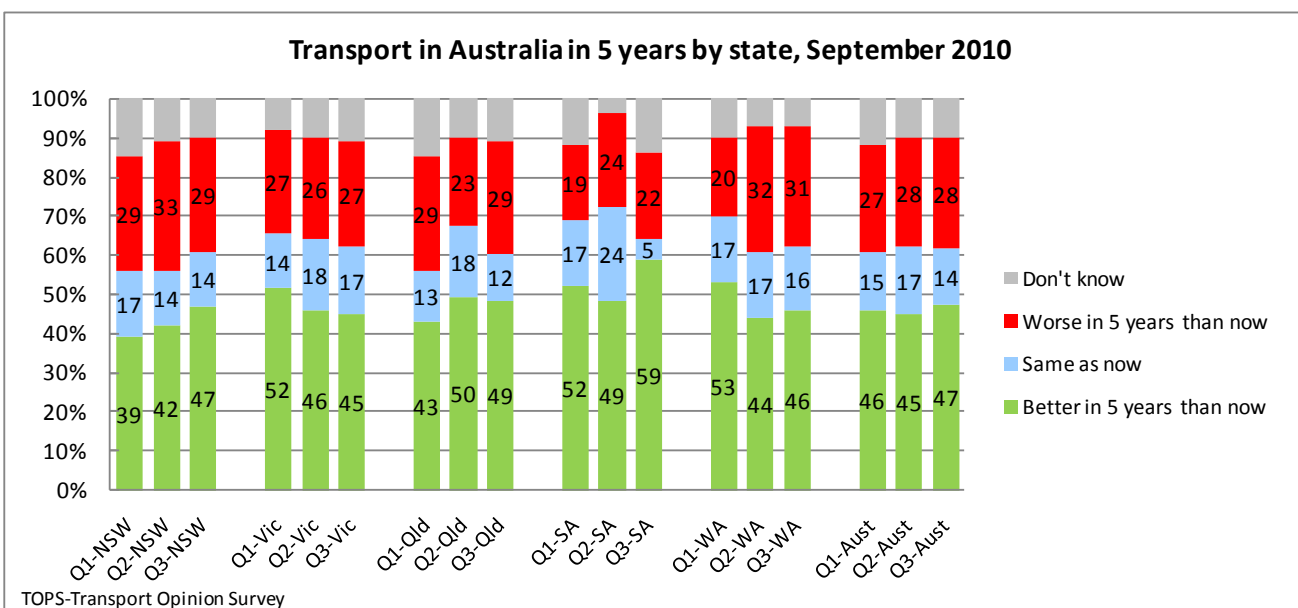


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the September 2010 quarter, overall there was little change in views about transport in Australia in five years' time. Australians are 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. Despite the federal election uncertainty, the "don't know" response was the same as the previous quarter.



- There were changes in confidence about future transport in Australia by state. In the September 2010 quarter, NSW residents became more confident, with 47% thinking transport in Australia will be better in five years (up from 42% last quarter). Queensland residents became less confident, with 29% (up from 23%) thinking transport in Australia will be worse in 5 years. SA residents are clearly the most confident of the states, with 59% thinking transport in Australia will be better in five years. WA residents maintained their views from the last quarter on transport getting worse, and WA is now the least confident state about transport in Australia in five years.



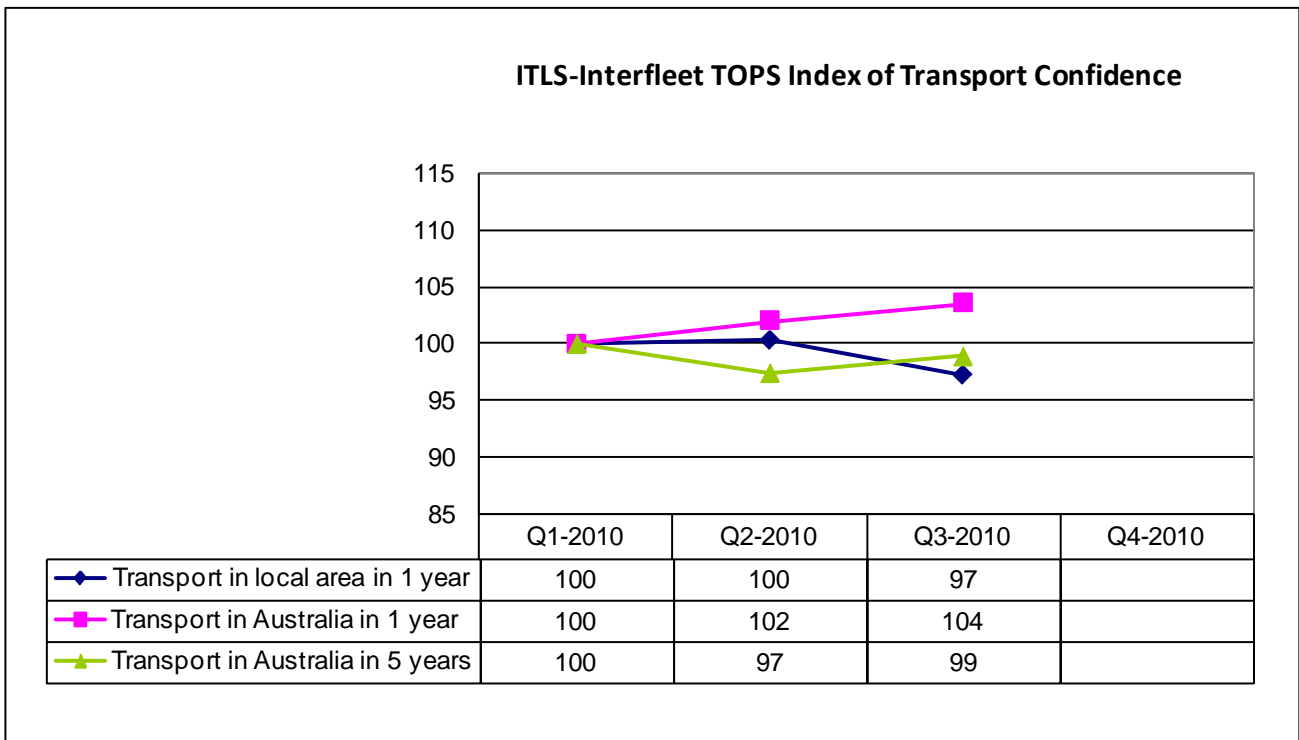
5. Change in confidence over time – TOPS Index

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 September 2010 quarter compared to the previous quarter:

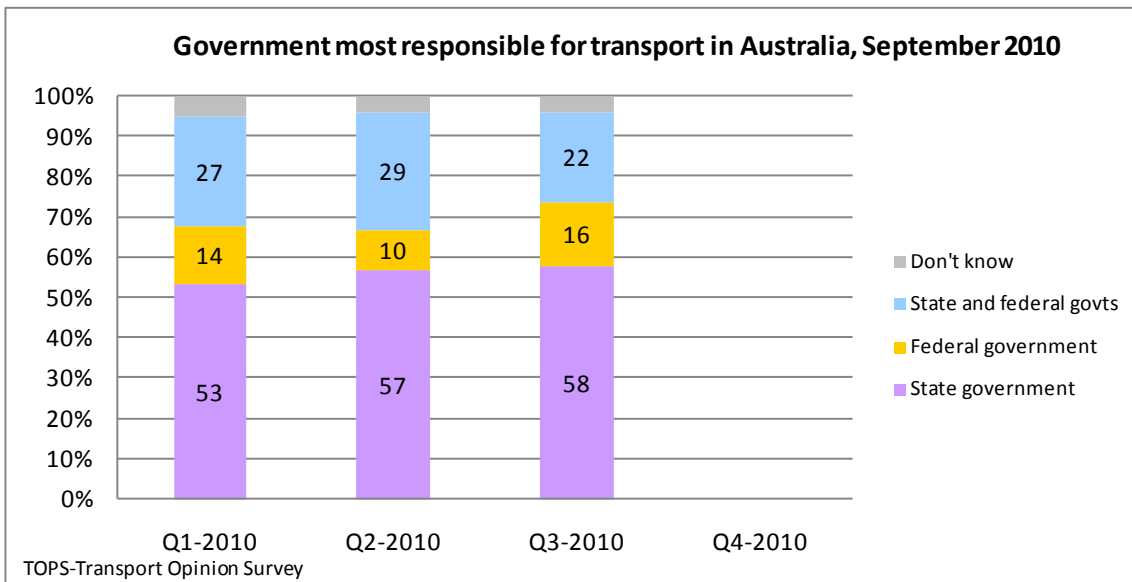
- Australians are slightly less confident about transport in their local area in one year's time
- Australians were slightly more confident about transport in Australia in one year's time
- Australians were slightly more confident about transport in Australia in five years' time.



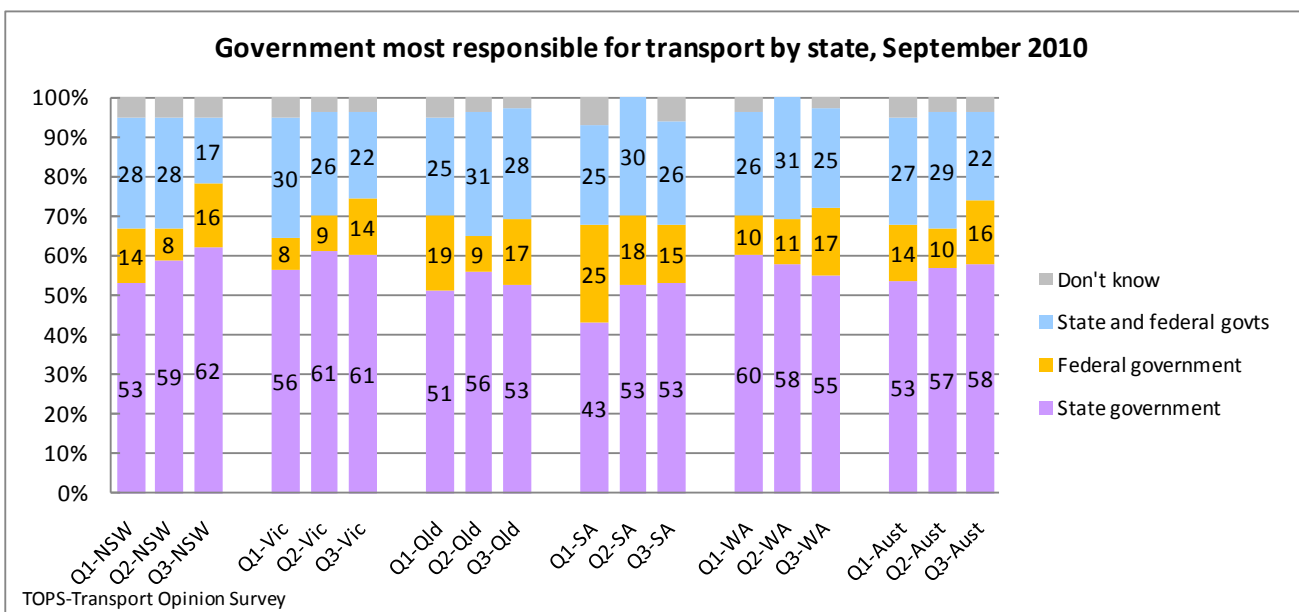
6. Government responsibility for transport

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

- In the September 2010 quarter, 58% of Australians think their state government is most responsible for transport, similar to the previous quarter. 16% nominated the Australian federal government as most responsible, an increase from 10% last quarter, likely reflecting transport announcements during the federal election campaign.



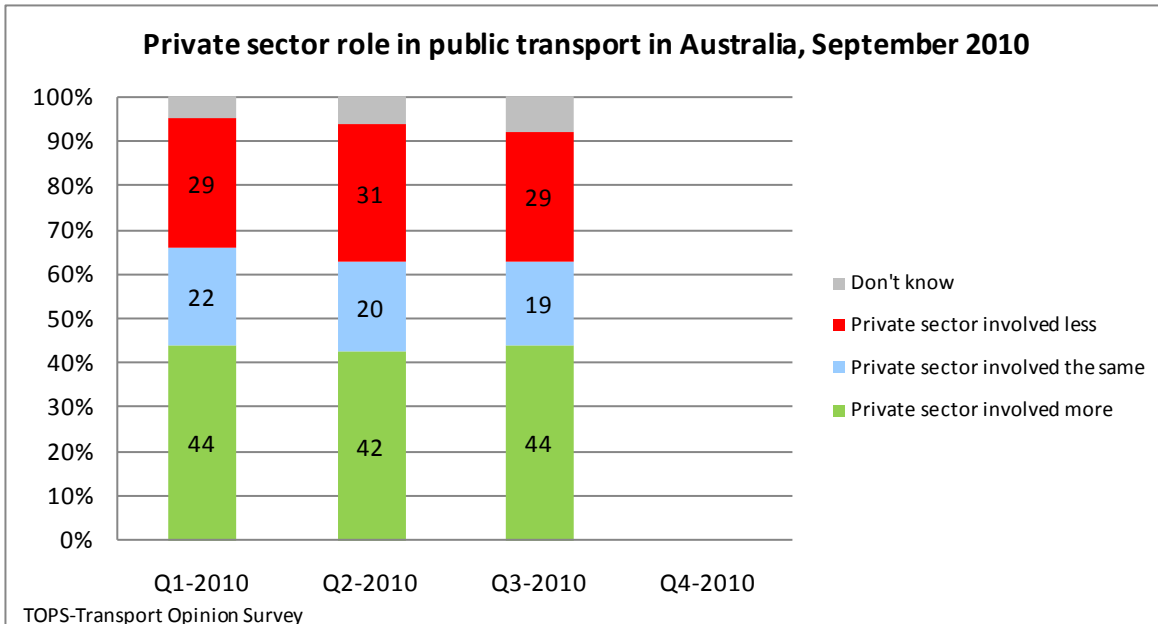
- In the September 2010 quarter, there was a notable increase in NSW and Queensland residents saying the federal government is most responsible for transport: 16% in NSW (up from 8% last quarter) and 17% in Queensland (up from 9% last quarter). Election campaign announcements for these states included the Epping-Parramatta rail line in Sydney, and the Redcliffe rail line in Brisbane.



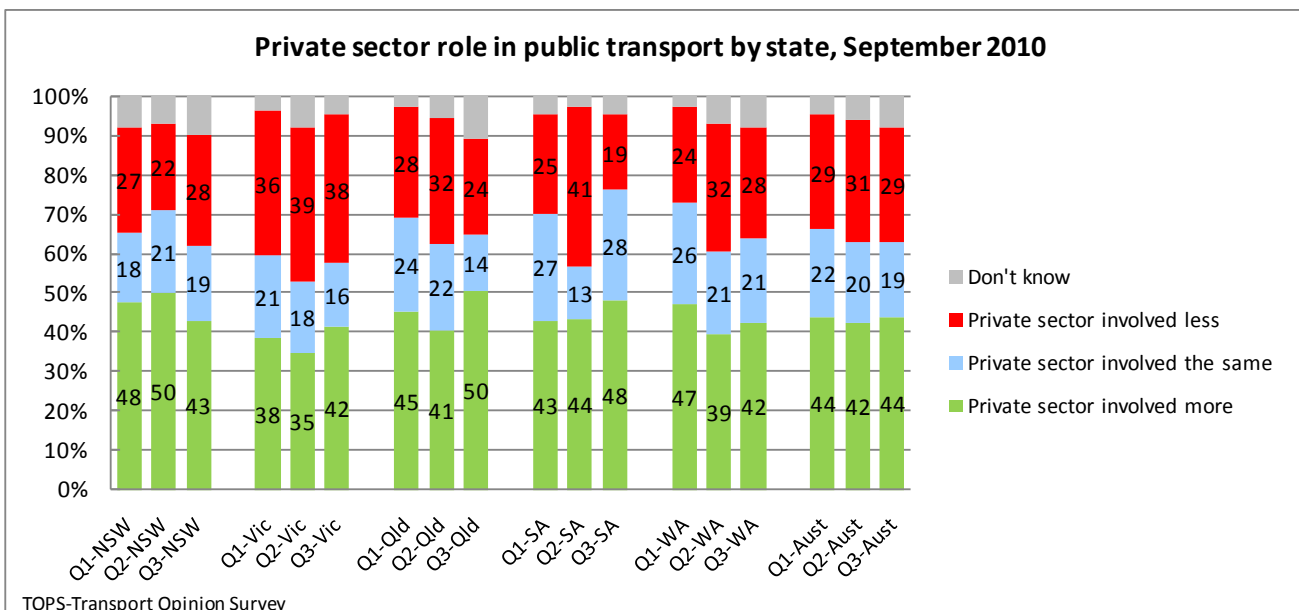
7. Private sector involvement in public transport provision

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 September 2010 quarter, 44% of Australians think the private sector should be involved more in the provision of public transport, while 29% think the private sector should be involved less.



- In the September 2010 quarter, in every state, more residents supported more private sector involvement in public transport rather than less involvement. NSW residents have decreased their support for private sector involvement in public transport. Queensland residents have increased their support for private sector involvement and are now the most supportive state with 50% wanting more private sector involvement. Victorian residents remain the least supportive of private sector involvement, with 38% wanting less private sector involvement in public transport.



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>

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Email business.itlsinfo@sydney.edu.au

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