

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

Quarter 4, December 2011

Highlights

Infrastructure increases as highest priority national issue

- In the December 2011 quarter, 7% of Australians nominated transport and 14% nominated infrastructure as one of the two highest priority issues in Australia today, a slight increase for infrastructure from 12% last quarter. Support for transport was highest in Victoria (10%).

Public transport the highest priority for transport

- Half of Australians (47%) said the highest priority issue for transport in Australia is public transport improvements, compared to 28% for road improvements. Support for public transport continued to be highest in Victoria (64%).

Transport not changing in local area

- In the December 2011 quarter, 57% of Australians said transport will be the same in their local area in one year's time, the highest level for eight quarters of the survey. Queensland had an increase in confidence, with 31% of residents saying transport in their local area will be better in one year.

Views stable on transport in Australia in short-term

- A quarter of Australians think transport in Australia will be better in one year's time (25%) and a quarter think transport will get worse (25%), similar to results last quarter. NSW was the least confident state about transport in Australia.

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 (46%) thinking transport in Australia will be better in five years.

Priorities for rail

- 58% of Australians said the highest priority for rail investment was rail within our cities while 32% said high speed rail between our cities. Support for rail within cities was highest amongst frequent public transport users, Victoria residents and people living in capital cities.

Qantas brand recovery

- Two-thirds of Australians (67%) said the Qantas brand will recover in time. Support was highest in Queensland (75%).

About the Transport Opinion Survey

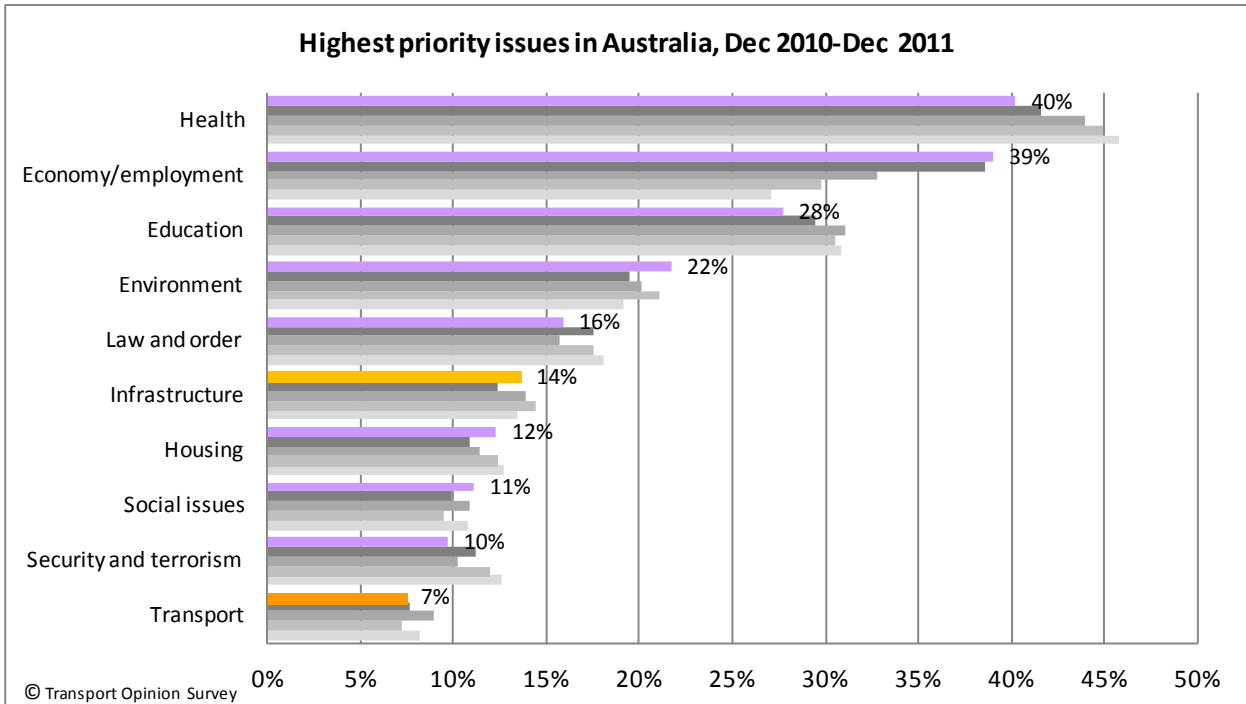
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained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

The Quarter 4, December 2011 survey was conducted over 4-22 November 2011. Current issues in the quarter included the ongoing financial crisis in Europe, the federal government's carbon tax legislation passed by parliament, and Qantas industrial relations issues with Qantas grounding its fleet in late October.

1. Transport as a national priority

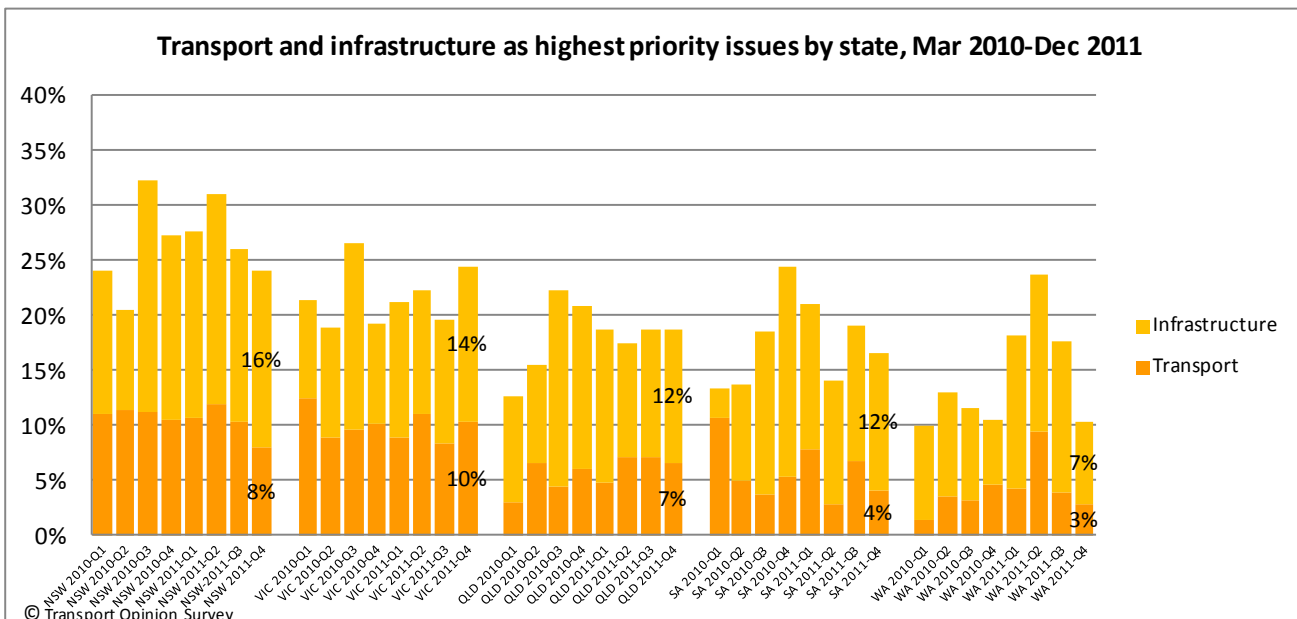
Which two of these issues [from list of 10 issues in random order] do you think are the highest priority in Australia today?

- In the December 2011 quarter, health and economy/employment were the equal highest priority issues in Australia today: each nominated by around 40% of Australians as one of the two highest priority issues. In the last year, economy/employment has increased in priority every quarter while health has declined.
- In the December 2011 quarter, 7% of Australians nominated transport as one of the two highest priority issues in Australia today, and 14% nominated infrastructure (up from 12% last quarter).



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

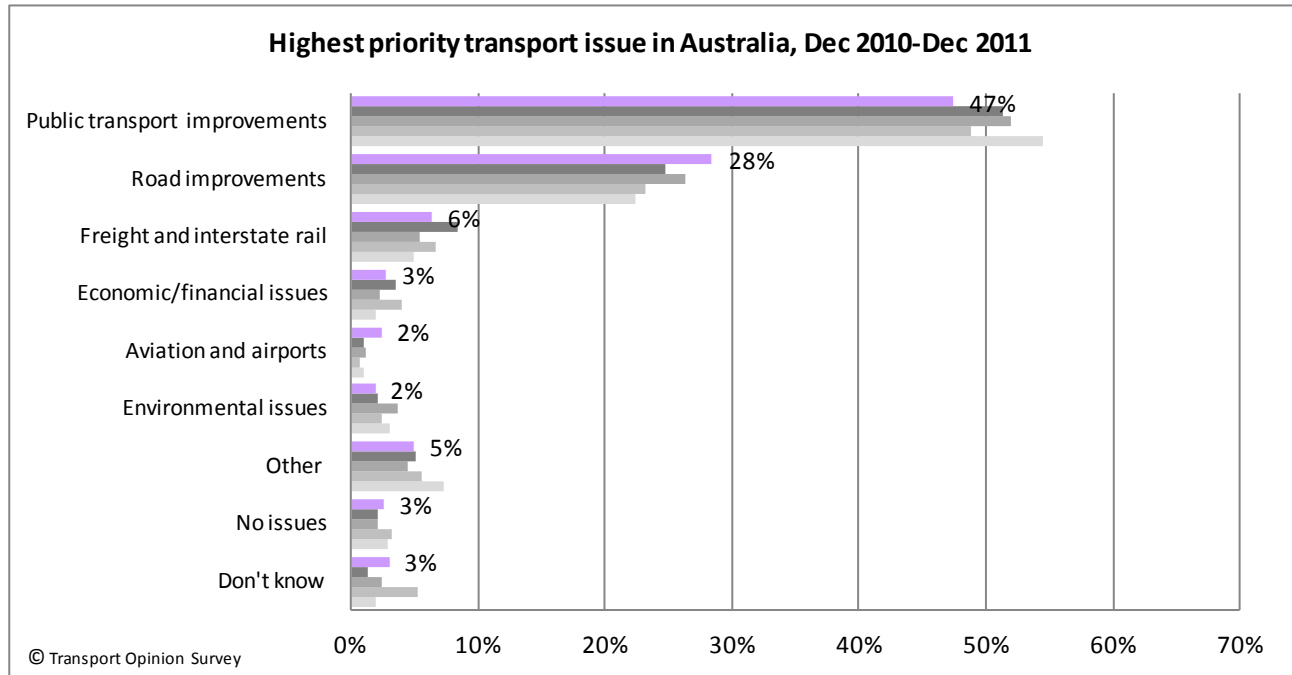
- In the December 2011 quarter, transport was most important in Victoria (10%).



2. Highest priority issue for transport

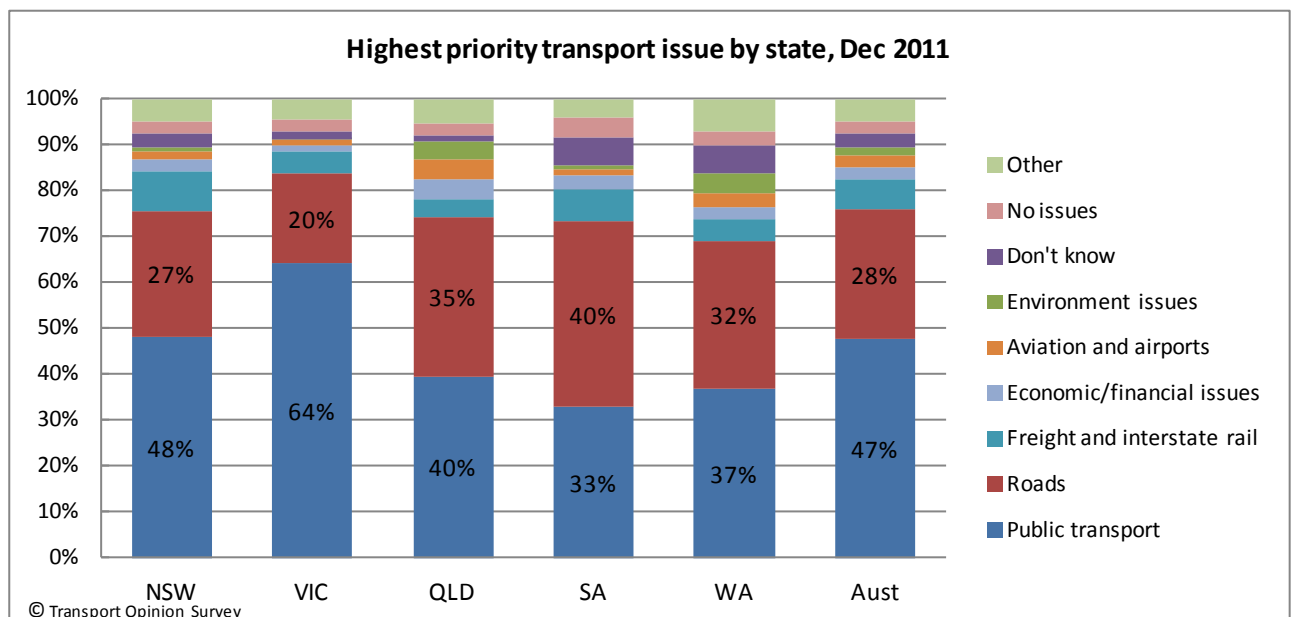
What do you think is the highest priority issue for transport in Australia now?

- In the December 2011 quarter, just under half of Australians (47%) said the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue in the eight quarters of the survey. Over a quarter of Australians (28%) said road improvements are the highest priority issue in transport. Aviation and airports increased as the highest priority transport issue as a result of the Qantas disruption, but remained very low in comparison to public transport and roads.



Note: Responses sum to 100%. December 2011 results are the top bar with % value, and previous four quarter results (December 2010, March 2011, June 2011 and September 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.

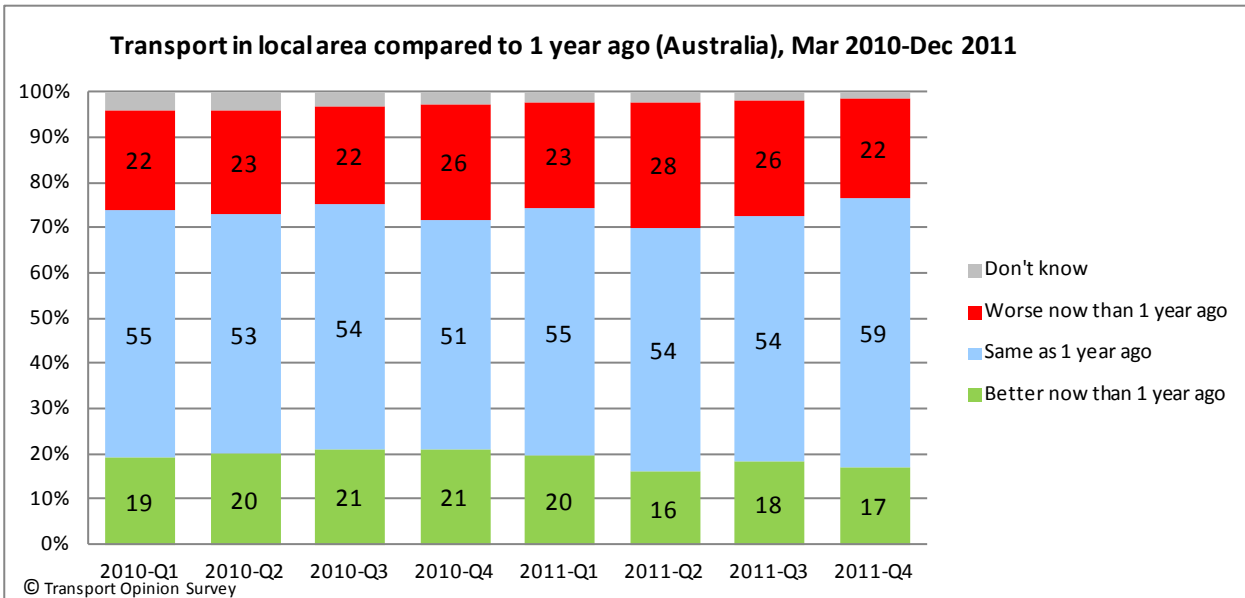
- Public transport improvements was the highest priority issue in transport in most states, with the highest support for public transport in Victoria (64%).



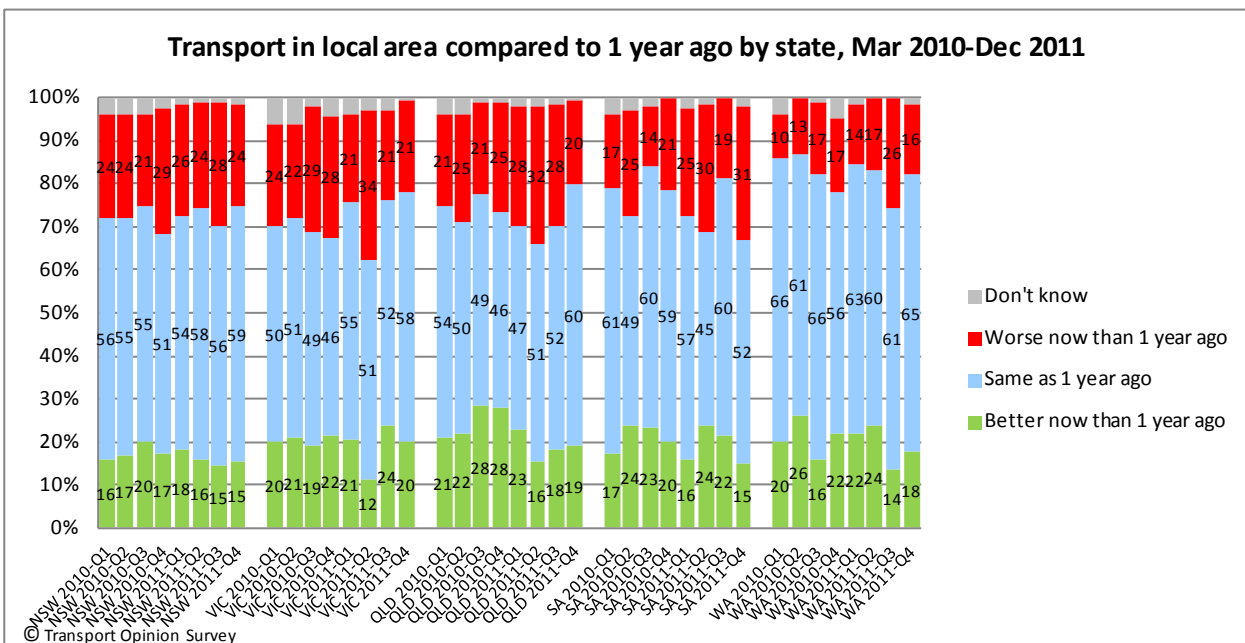
3. Confidence about transport improving in local area

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 December 2011 quarter, 59% of Australians said transport in their local area is the same now as one year ago, the highest in the eight quarters of the survey. There was a decrease in those who said transport is worse now than one year ago (22%, down from 26% last quarter).

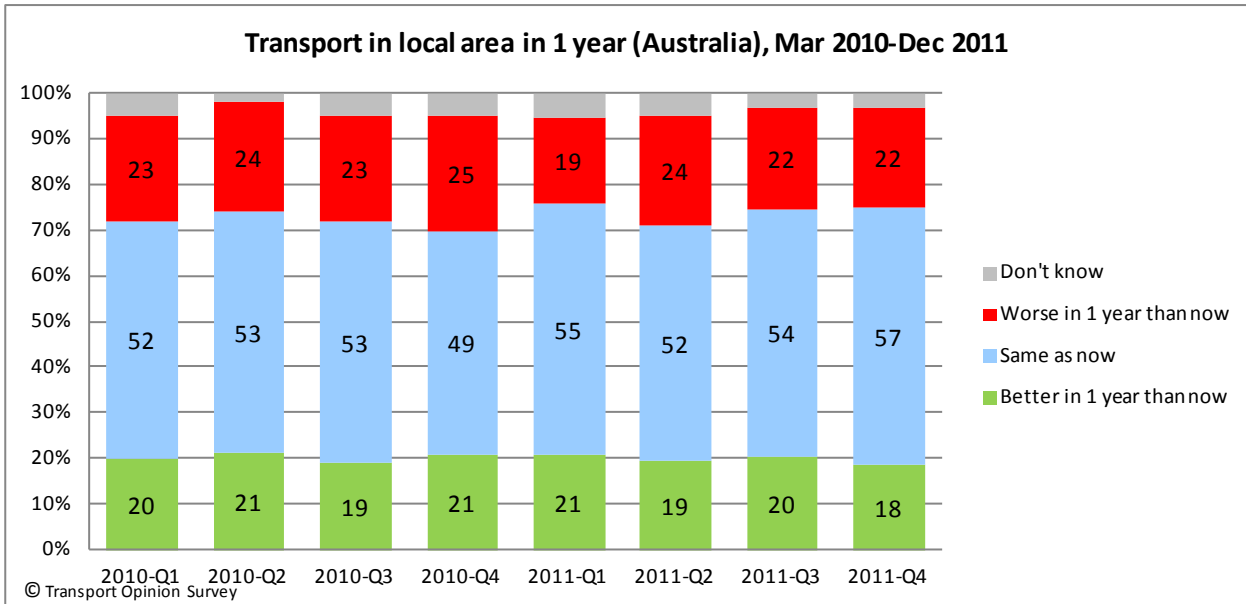


- In the December 2011 quarter, there was an increase in residents in most states (except South Australia) who said transport in their local area is the same now as one year ago.

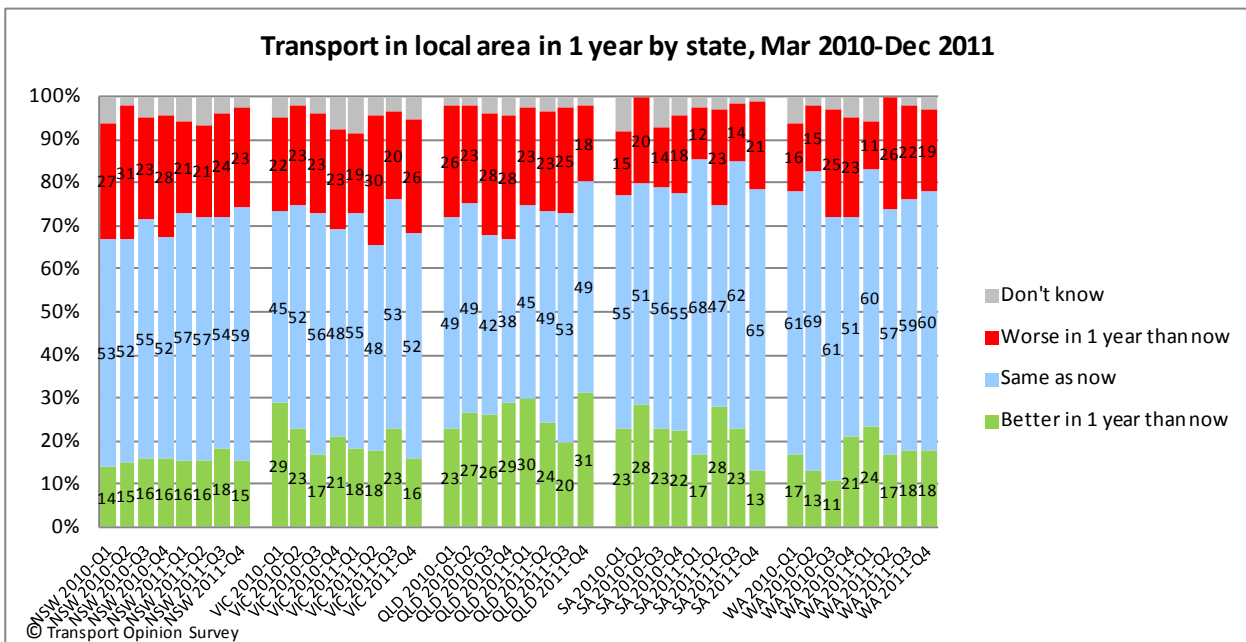


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In the December 2011 quarter, 57% of Australians said transport in their local area will be the same in one year's time, the highest in eight quarters of the survey. Only 18% said transport will be better, the lowest in eight quarters.

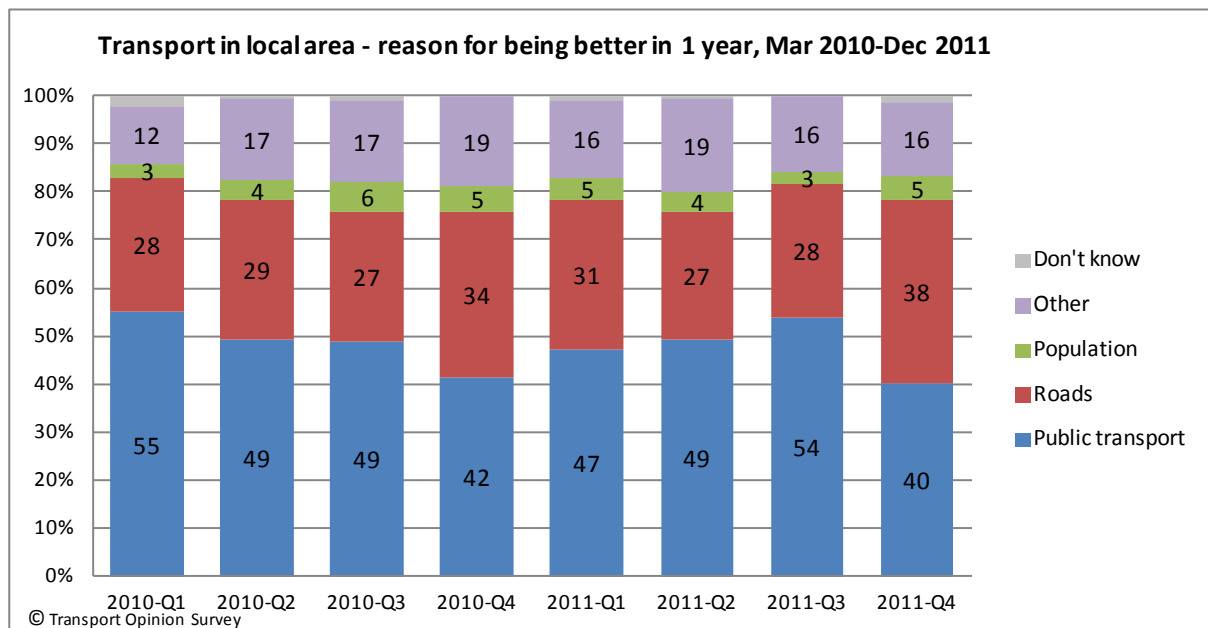


- In the December 2011 quarter, there was an improvement in confidence in Queensland: nearly one in three Queensland residents said transport in their local area will be better in one year (31%, up from 20% last quarter). In contrast, Victorian residents became less confident about transport in one year's time: only 16% said transport in their local area will be better in one year (down from 23% last quarter).



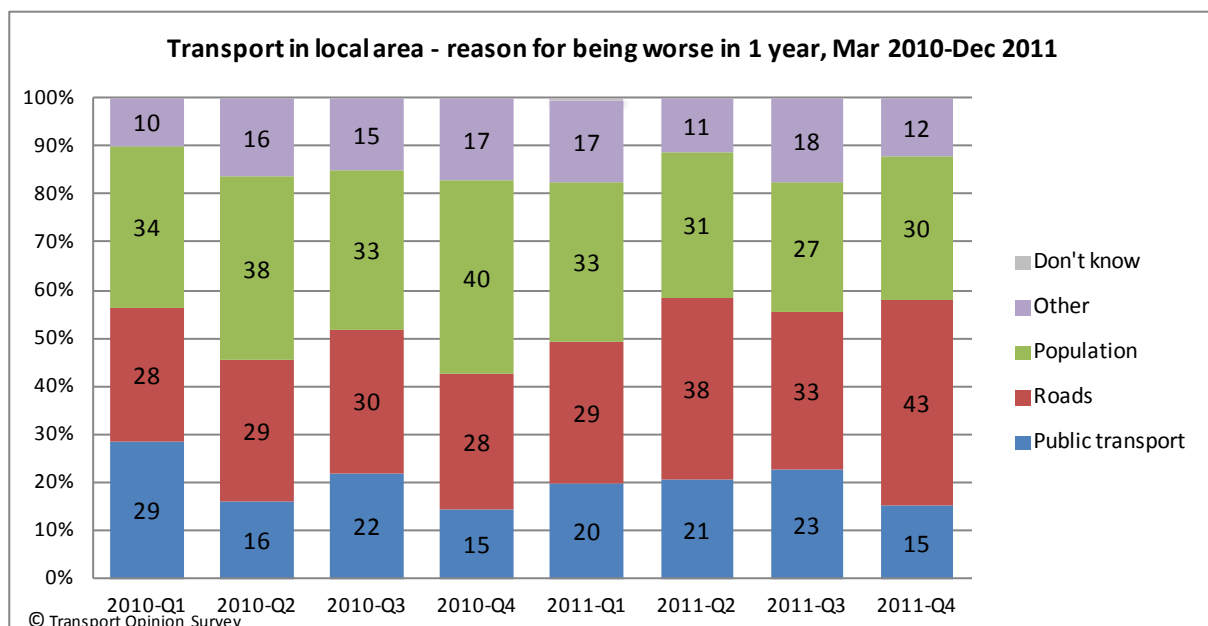
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the December 2011 quarter, the 18% of Australians who said transport in their local area will be **better** in one year were thinking about both public transport (40%, down from 54% last quarter) and roads (38%, up from 28% last quarter). "Other" includes 5% who were thinking of the government role in integration, planning and coordination. Of the 31% of Queensland residents who said transport will be better, almost half (48%) were thinking of roads.



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 December 2011 quarter, the 22% of Australians who said transport in their local area will be **worse** in one year were thinking about roads (43%, up from 33% last quarter) and population-related changes (30%, up from 27% last quarter). "Other" includes 7% thinking of the government role in integration, planning and coordination.

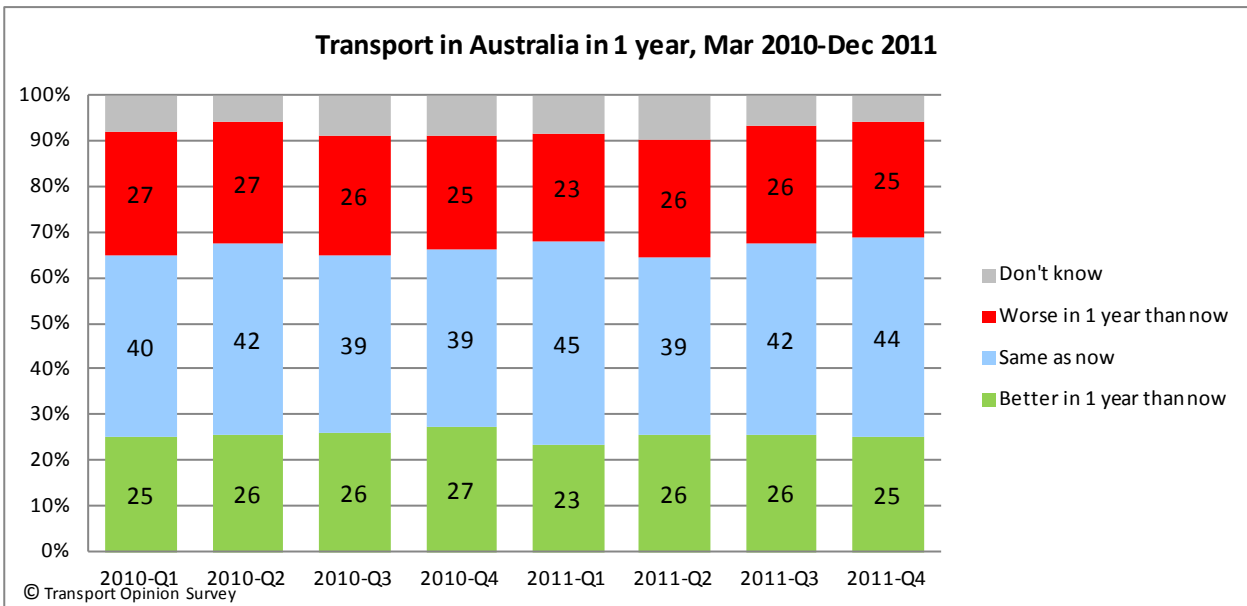


Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

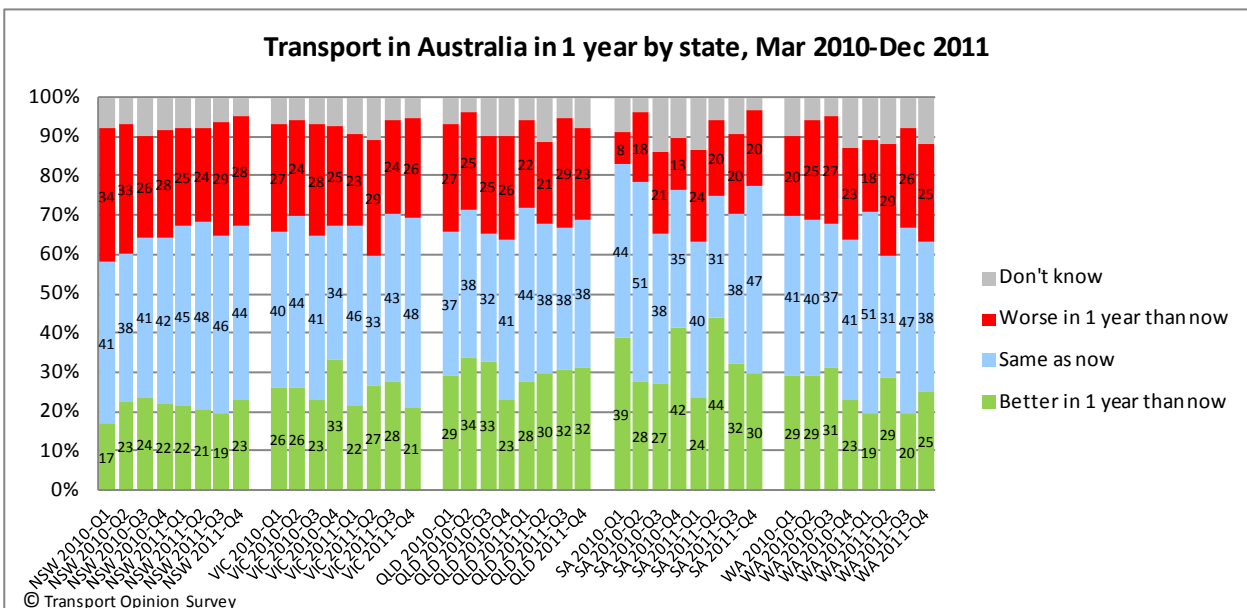
4. Confidence about transport improving in Australia

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 December 2011 quarter, there was an increase in Australians who said transport in Australia in one year will be the same as now (44%, up from 42% last quarter). A quarter of Australians said transport in Australia will be better in one year's time (25%) and a quarter said transport will be worse (25%).

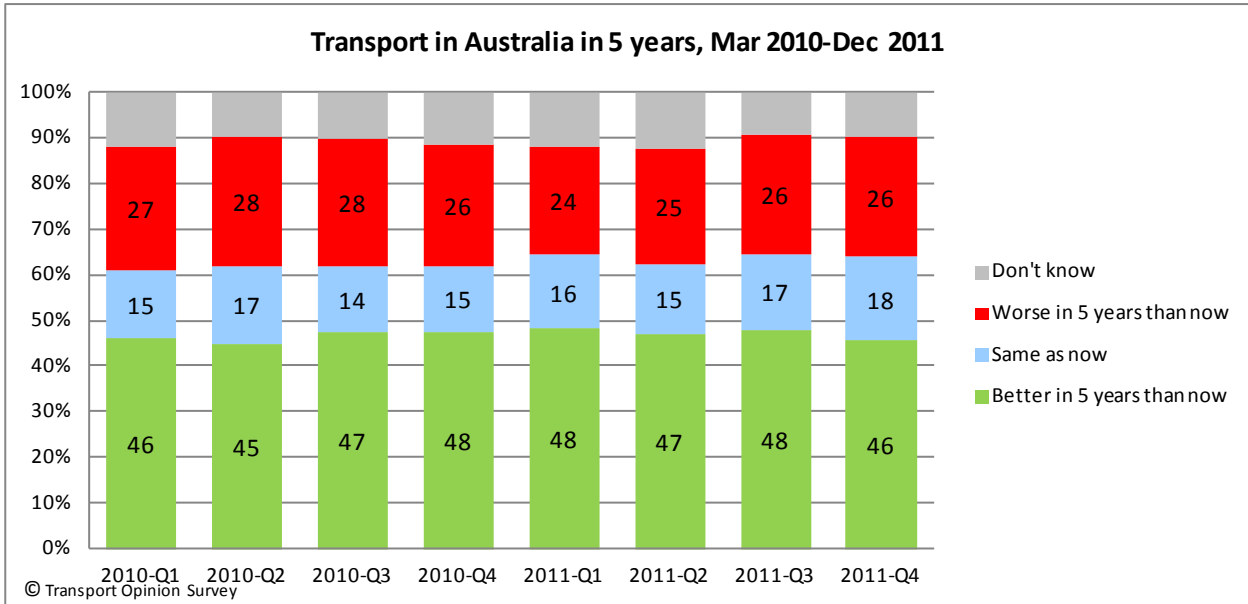


- In the December 2011 quarter, NSW was the least confident state about transport in Australia: 23% of NSW residents said transport in Australia will be better in one year and 28% said transport will be worse in one year.

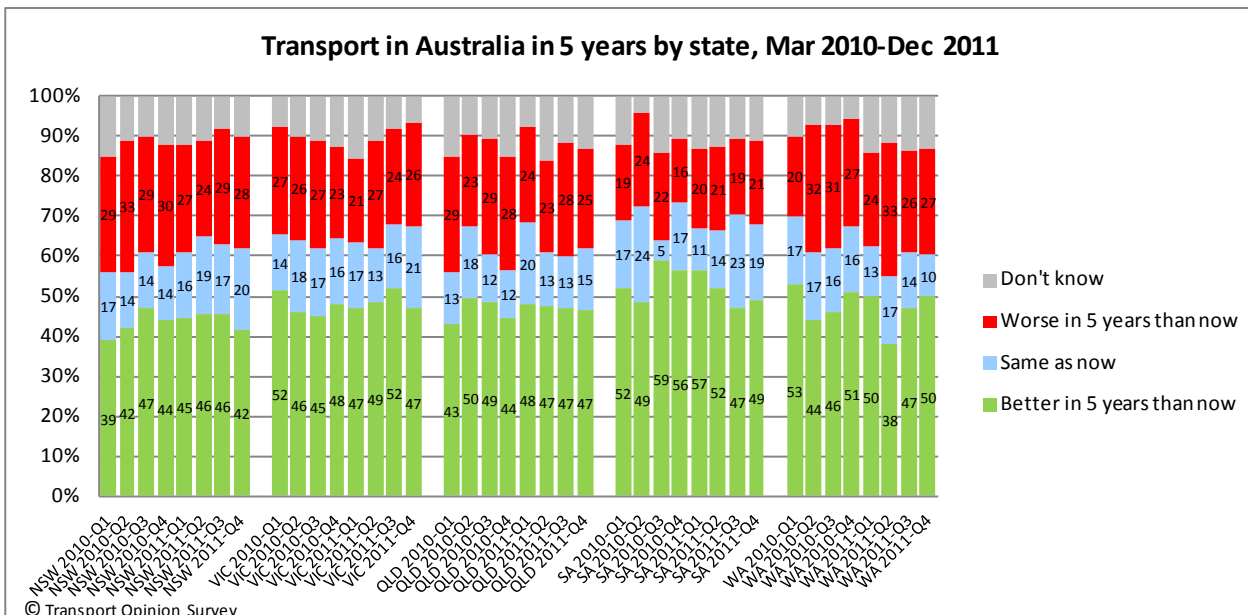


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the December 2011 quarter, Australians remained more confident that transport will be better in five years than in one year, with almost half (46%) thinking transport in Australia will be better in five years.



- In the December 2011 quarter, both NSW and Victoria had a decline in residents saying transport in Australia will be better in five years than now. NSW was the state with the lowest confidence about transport in Australia in five years' time. Western Australia residents were most polarised in their views about transport in Australia in five years, with only 10% of residents saying transport will be the same as now.



5. Change in confidence over time – TOPS Index

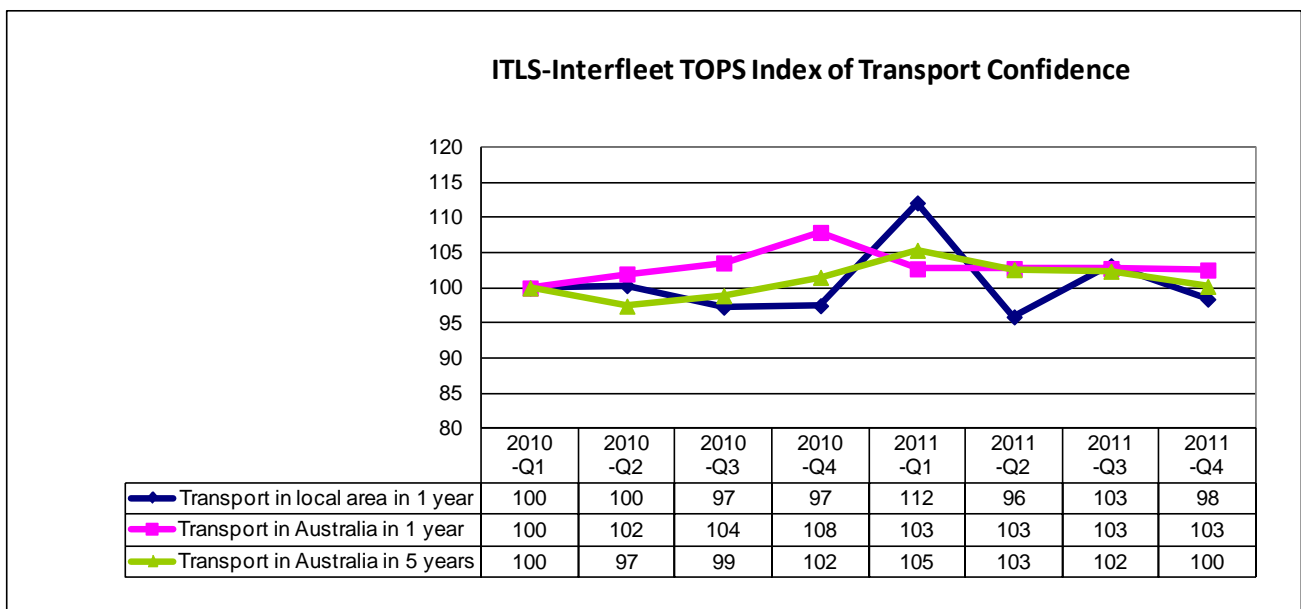
Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in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

- Australians became slightly 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 slightly less confident about transport in their local area, slightly more confident about transport in Australia in one year, and unchanged in confidence about transport in Australia in five years, as all three indices are around 100.

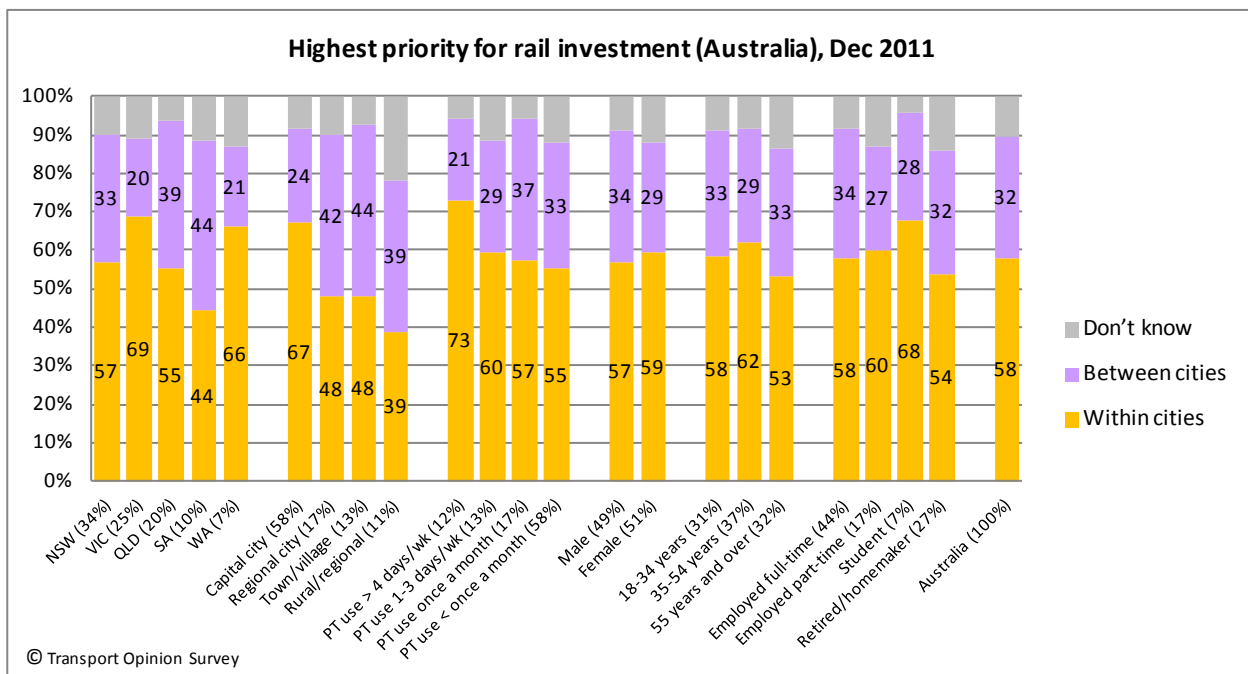


6. Priorities for rail

In the December 2011 quarter, a new question was asked about priorities for rail transport.

*Now a question on priorities for rail transport. Should the highest priority for rail be investing in high speed rail **between** our cities or investing in rail **within** our cities?*

- Overall, 58% of Australians said that investing in rail within our cities was the highest priority, while 32% said high speed rail between our cities. 10% of respondents were unable to choose a priority.
- As might be expected, support for investing in rail within cities was highest amongst frequent public transport users (73%), Victoria residents (69%), and people living in capital cities (67%).
- Support for investing in rail between cities was highest amongst South Australia residents (44%), and people living outside capital cities in regional cities (42%), towns or villages (44%), and in rural or regional areas (39%).
- There was little difference in views on the highest priority for rail by sex or age.



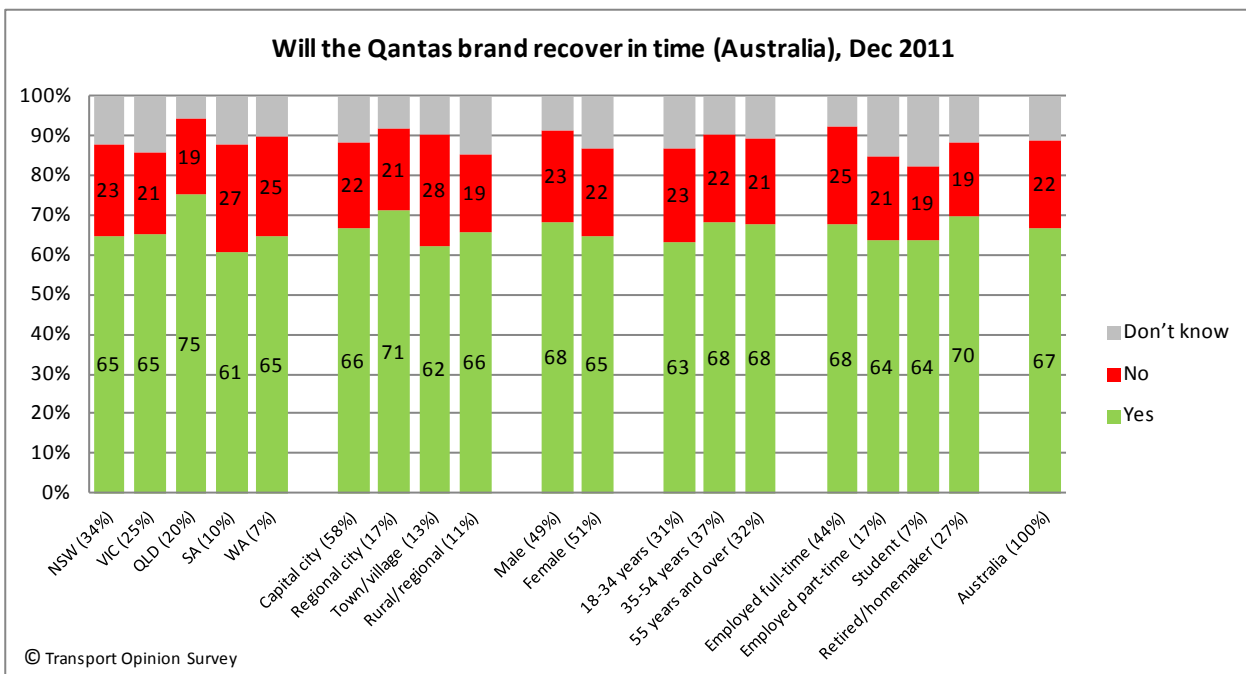
Note: The % in brackets for each category indicates the % of respondents in that category of state, town size, public transport use, sex, age and labour force status. Town size is self-reported by respondent.

7. Qantas brand

In the December 2011 quarter, a second new question was asked about the Qantas brand following the disruptions to flights by industrial action in October and the decision by Qantas to ground its fleet in late October in the week before the survey fieldwork commenced. During the fieldwork, Qantas announced measures to compensate customers for the grounding of the fleet and disruption to services.

Now a question on aviation. Do you think the Qantas brand will recover in time?

- Overall, 67% of Australians said that the Qantas brand will recover in time. 11% of respondents were unable to answer.
- By state, Queensland residents were most likely to say the Qantas brand will recover in time (75%), compared to residents in other states. Views did not vary much by town size, but people living in regional cities were most likely to say the brand will recover in time (71%).
- There was little difference in views on the recovery of the Qantas brand by sex, age or labour force status.



Note: The % in brackets for each category indicates the % of respondents in that category of state, town size, sex, age and labour force status. Town size is self-reported by respondent.

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
- September 2011: 11-25 August 2011
- December 2011: 4-22 November 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>

A paper titled "Monitoring community views on transport confidence over time: the quarterly Transport Opinion Survey (TOPS)" was presented at the 34th Australasian Transport Research Forum conference in Adelaide on 28-30 September 2011. The paper is available on the TOPS website and on the ATRF conference website at: http://www.atrf11.unisa.edu.au/Assets/Papers/ATRF11_0009_final.pdf

The Institute of Transport and Logistics Studies in The University of Sydney Business School provides education and conducts research in transport, logistics and supply chain management.

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