

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

Quarter 4, December 2010

Highlights

- In the December 2010 quarter, 8% 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.
- Over half of Australians (54%) said the highest priority issue for transport in Australia is public transport improvements, which has been constant throughout 2010. Support for public transport was highest in Victoria.
- One in five Australians (21%) said transport in their local area improved in the last year, similar to the previous quarter, but more (26%) said transport is worse now. Queensland was the state with the highest recognition of transport being better now than a year ago.
- One in five Australians (21%) said transport in their local area will be better in one year's time, but one in four (25%) said it will be worse in one year. Queensland was also the state both most positive about transport being better in one year and most negative.
- A quarter of Australians (27%) said transport in Australia will be better in one year's time than now, while 25% said it will be worse, similar to the previous quarter. Victorian and SA residents became more confident compared to the last quarter, while Queensland residents became less confident.
- 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 outcome of the federal election does not appear to have influenced confidence about the long-term.
- The TOPS Index shows that in the December 2010 quarter, compared to the previous quarter, Australians became slightly more confident about both transport in Australia in one year's time and transport in Australia in five years.
- 56% of Australians said their state government is most responsible for transport, while 16% nominated the federal government as most responsible, similar to the last quarter which included transport announcements for NSW and Queensland during the federal election campaign. Victoria is the state which holds the state government most responsible for transport (63%).
- 44% of Australians said the private sector should be involved more in the provision of public transport, while 32% said the private sector should be involved less. Victoria is 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

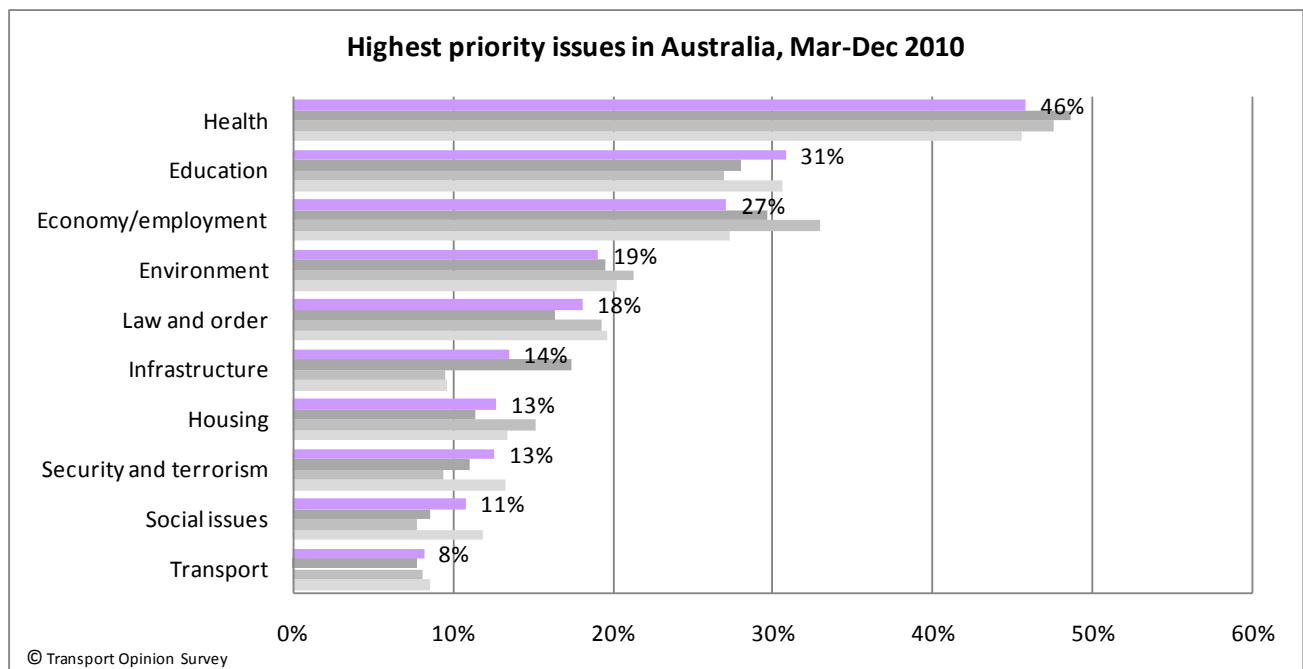
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained interviewers.

The Quarter 4, December 2010 survey was conducted over 5-17 November 2010. Current issues in the quarter included the Victorian state election on 27 November, the aftermath of the federal election on 21 August 2010 with a hung parliament led by Labor, and privatisation of Queensland's QR National.

1. Transport as a national priority

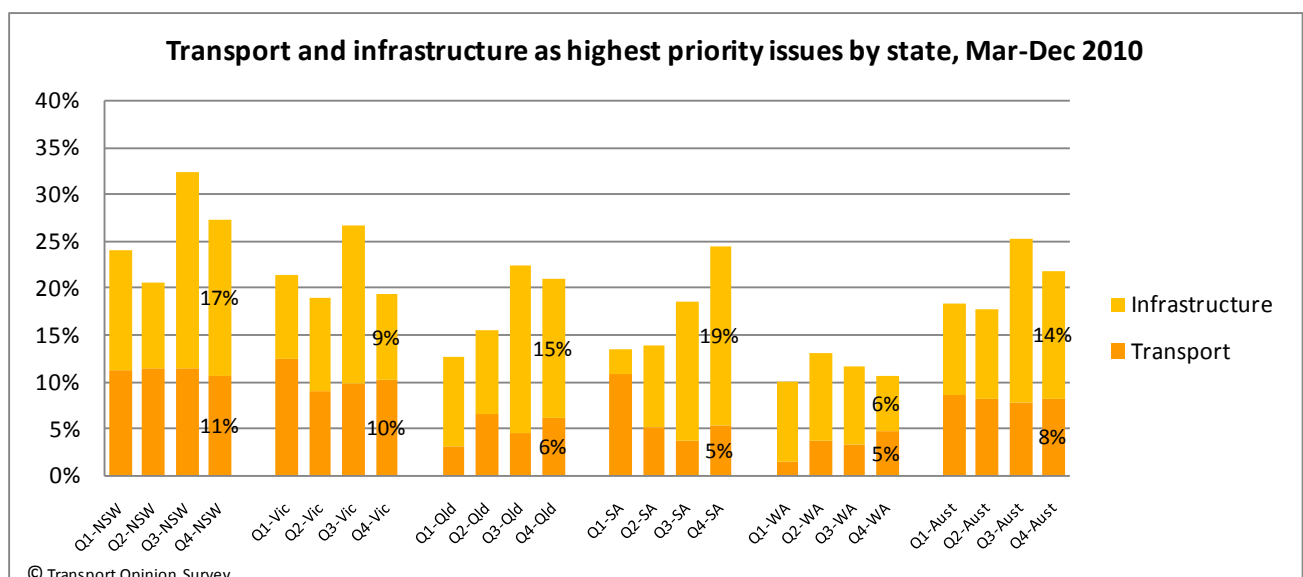
Which two of these issues [from list of 11 issues] do you think are the highest priority in Australia today?

- In the December 2010 quarter, health remained the highest priority issue in Australia today: health was nominated by 46% of Australians as one of the two highest priority issues, followed by education (31%) and economy/employment (27%).
- In the December 2010 quarter, 8% of Australians nominated transport as one of the two highest priority issues in Australia today, which is unchanged throughout 2010, and 14% nominated infrastructure, a slight decrease from the previous quarter when the National Broadband Network was an issue during the federal election campaign.



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

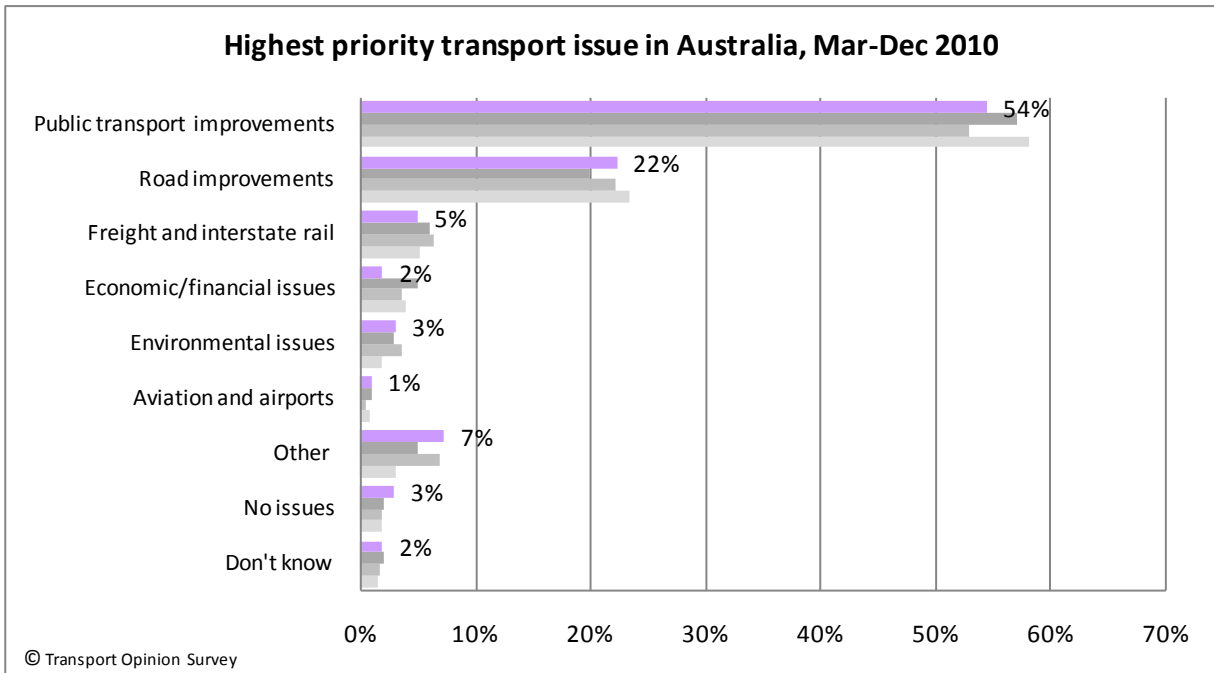
- In the December 2010 quarter, there was little change in transport as a priority issue by state, with transport remaining most important in NSW and Victoria. Throughout 2010, transport and infrastructure had the lowest priority in WA.



2. Highest priority issue for transport

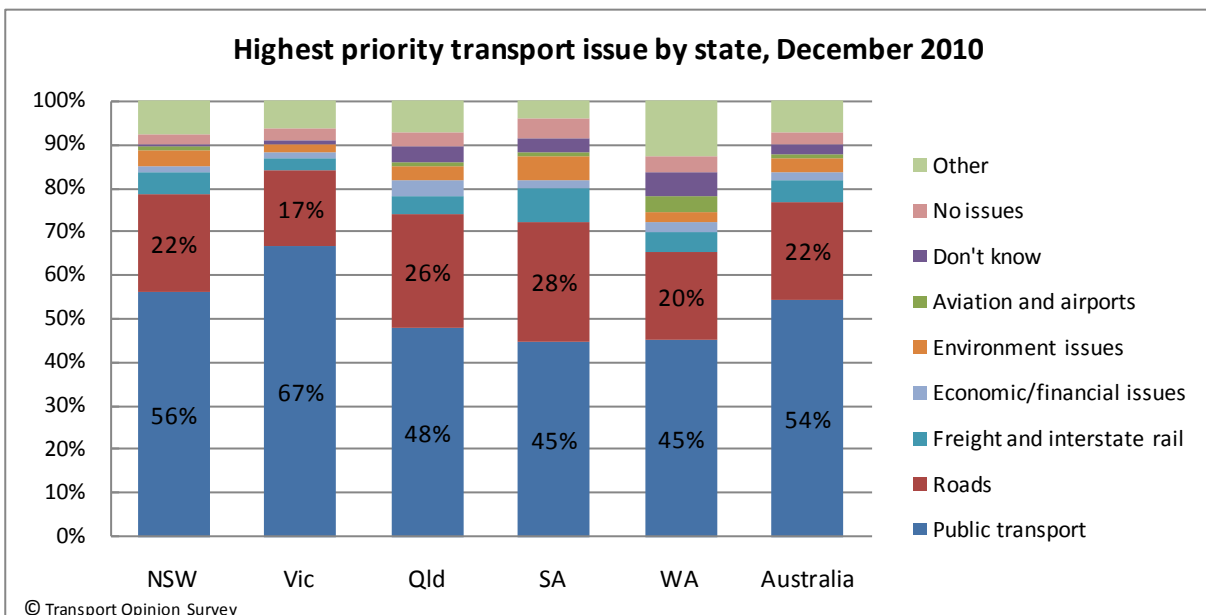
What do you think is the highest priority issue for transport in Australia now?

- In the December 2010 quarter, over half of Australians (54%) said the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue throughout 2010. 22% of Australians 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, June and September 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.

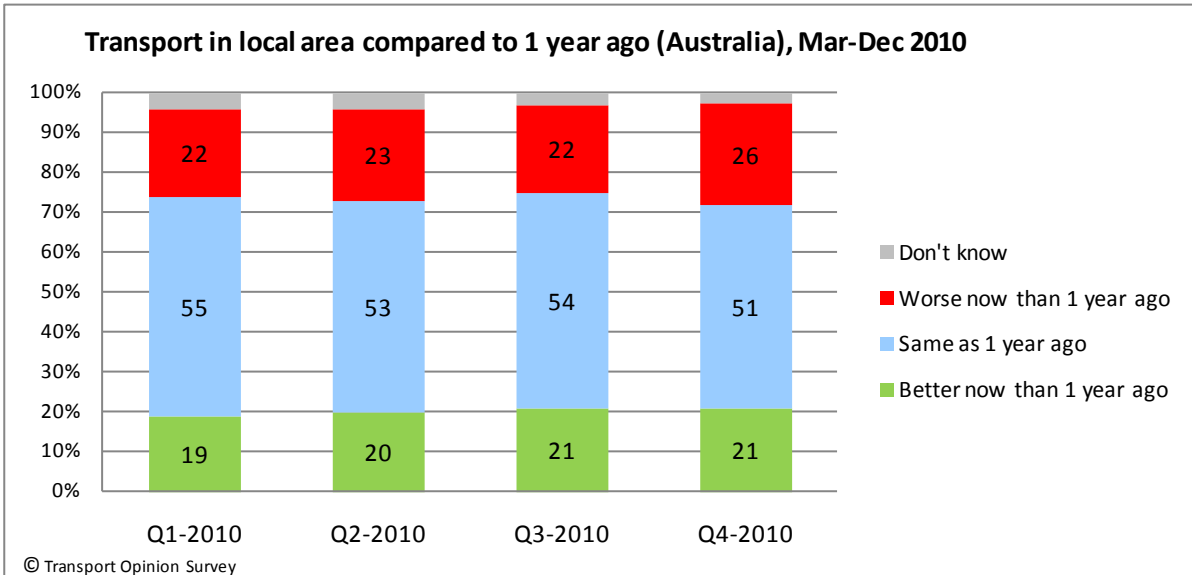
- Public transport improvements was the highest priority issue in transport in every state, as it was in the previous quarter. Two-thirds of Victorians (67%) nominated public transport improvements as the highest priority issue in transport.



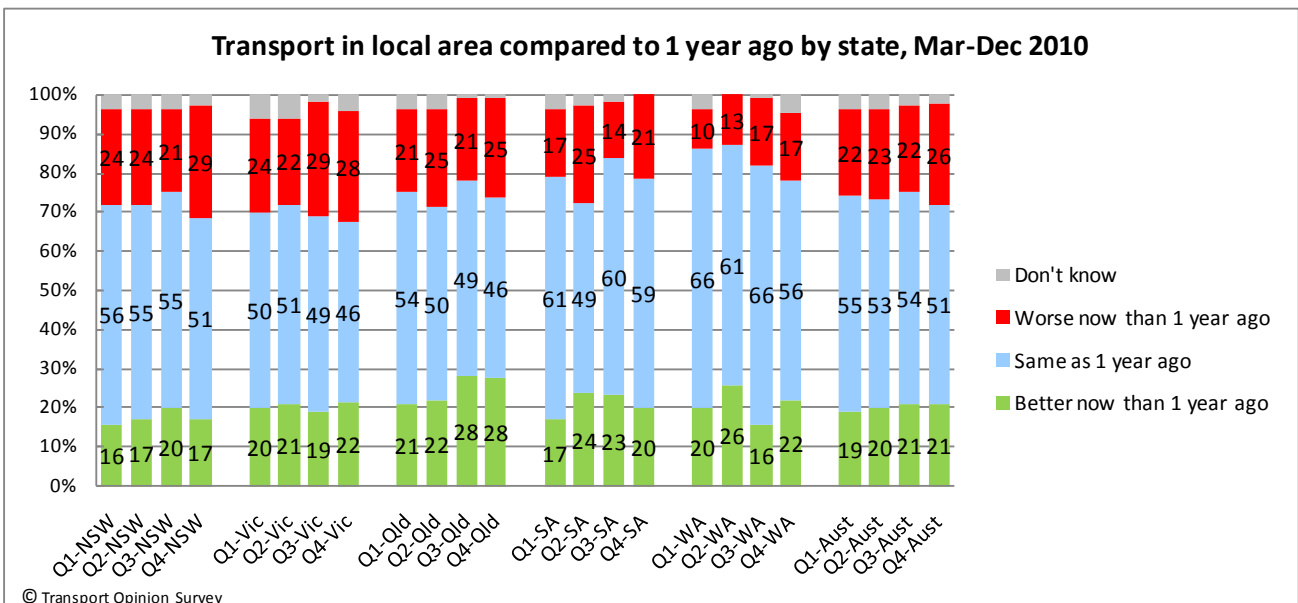
3. Confidence about transport improving in local area

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 2010 quarter, one in five Australians (21%) said transport in their local area improved in the last year, while 26% (up from 22% last quarter) said transport was worse now.

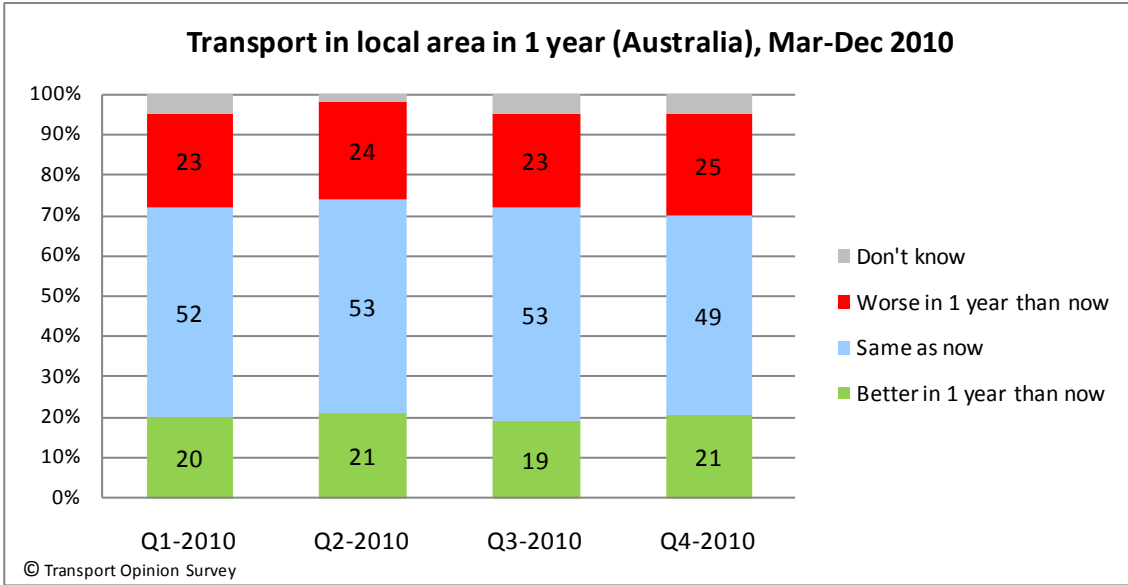


- In the December 2010 quarter, 29% of NSW residents said transport is worse now than one year ago (up from 21% last quarter), which is similar to Victorian residents (28%). There was an increase in SA residents who said transport is worse now (21%, up from 14% last quarter). 28% of Queensland residents said transport is better now than one year ago, similar to last quarter and the highest of any state.

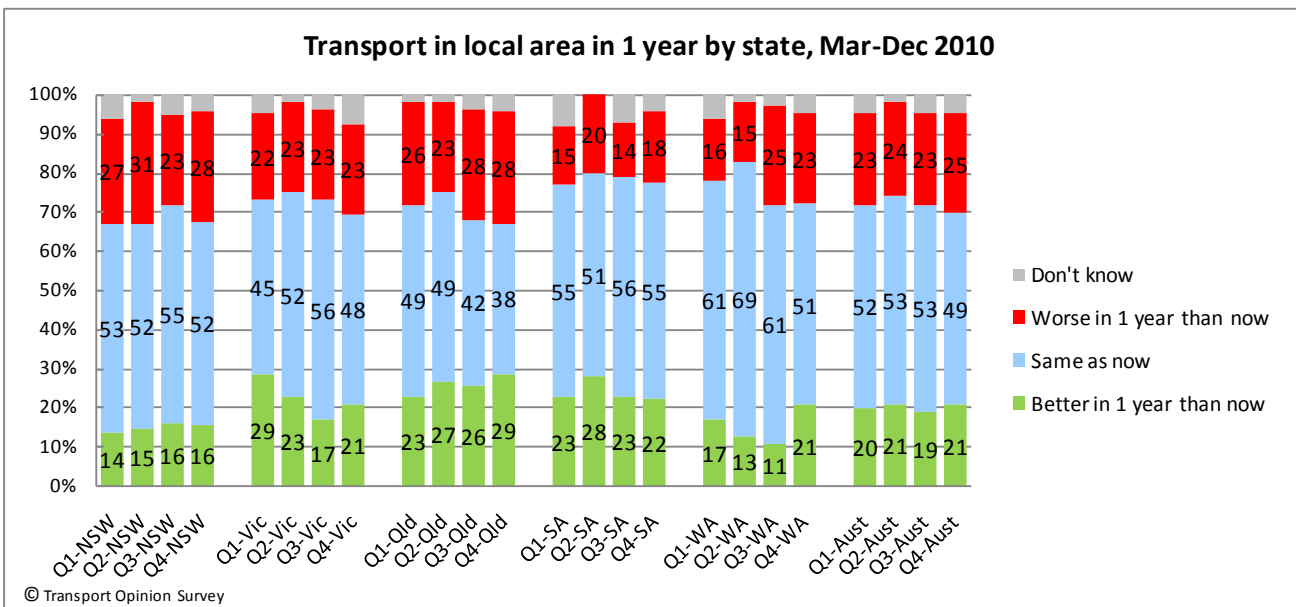


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In the December 2010 quarter, one in five Australians (21%) think transport in their local area will be better in one year's time. About half of Australians said transport will be the same, while there was an increase (25%, up from 23% last quarter) in people who think transport will be worse in one year.

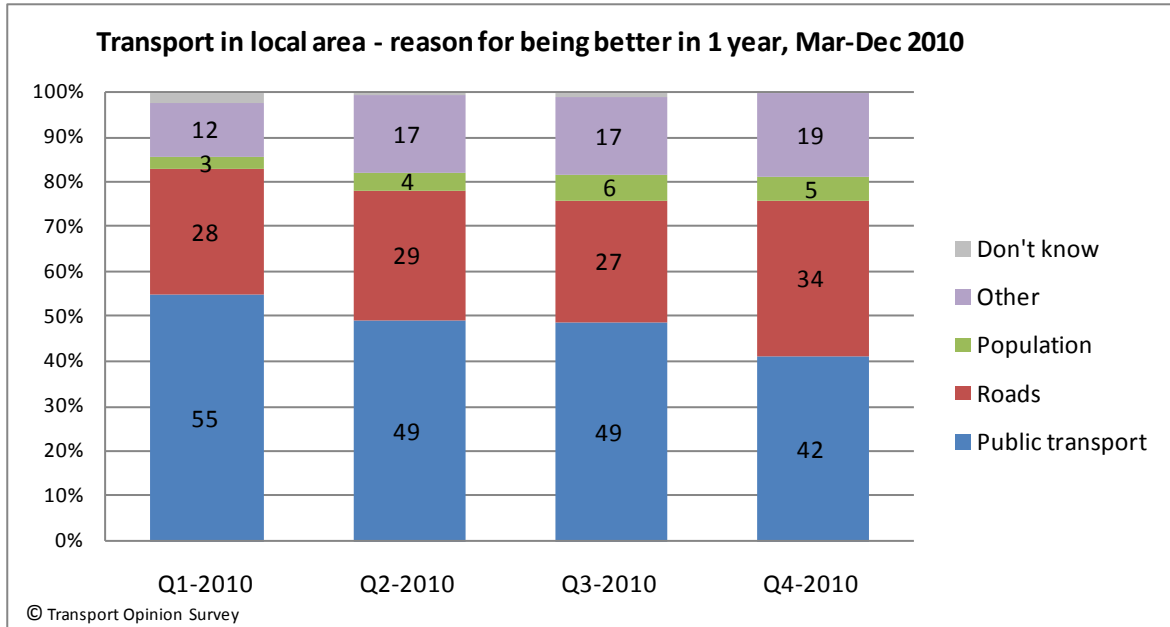


- In the December 2010 quarter, there were changes by state. There was a large increase in WA residents who said transport will be better in one year (21%, up from 11% last quarter). In NSW, there was a return to the pessimism of previous quarters, with 28% saying transport will be worse in one year than now. Queensland residents are the least likely to think transport will be the same in one year, with 29% thinking it will be better than now, but about the same thinking it will be worse than now.



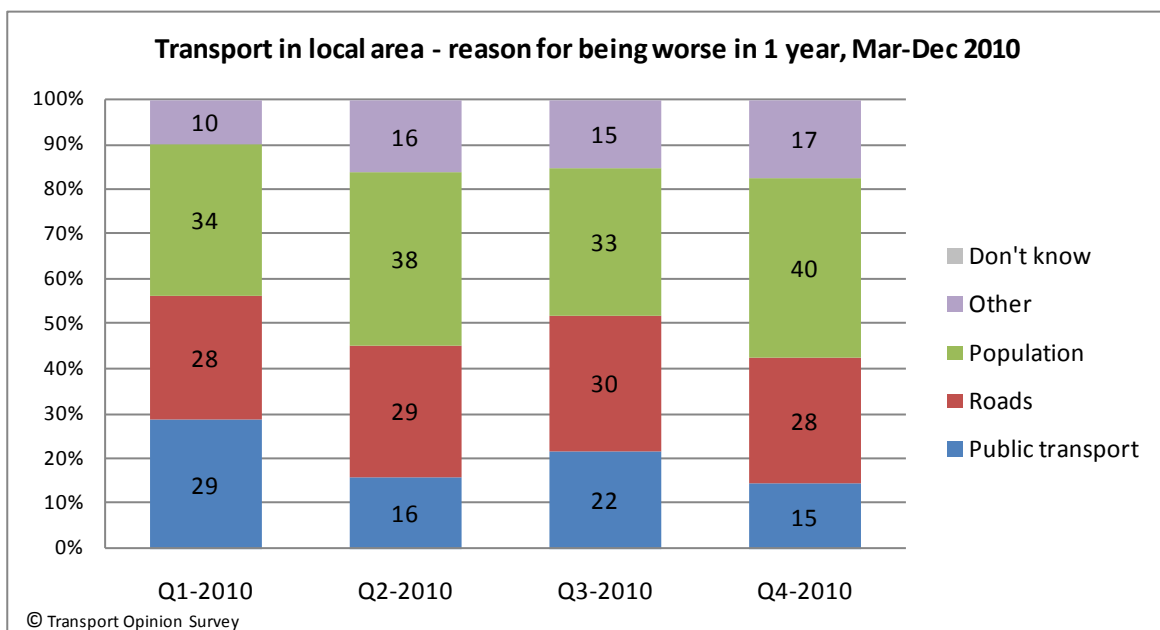
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the December 2010 quarter, the 21% of Australians who said transport in their local area will be better in one year were thinking about public transport (42%, down from 49% last quarter) more than roads (34%, up from 27% 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 December 2010 quarter, the 25% of Australians who said transport in their local area will be worse in one year were thinking about population-related changes (40%, up from 33% last quarter) and roads (28%, similar throughout 2010). "Other" includes 9% thinking of the government role in integration, planning and coordination.

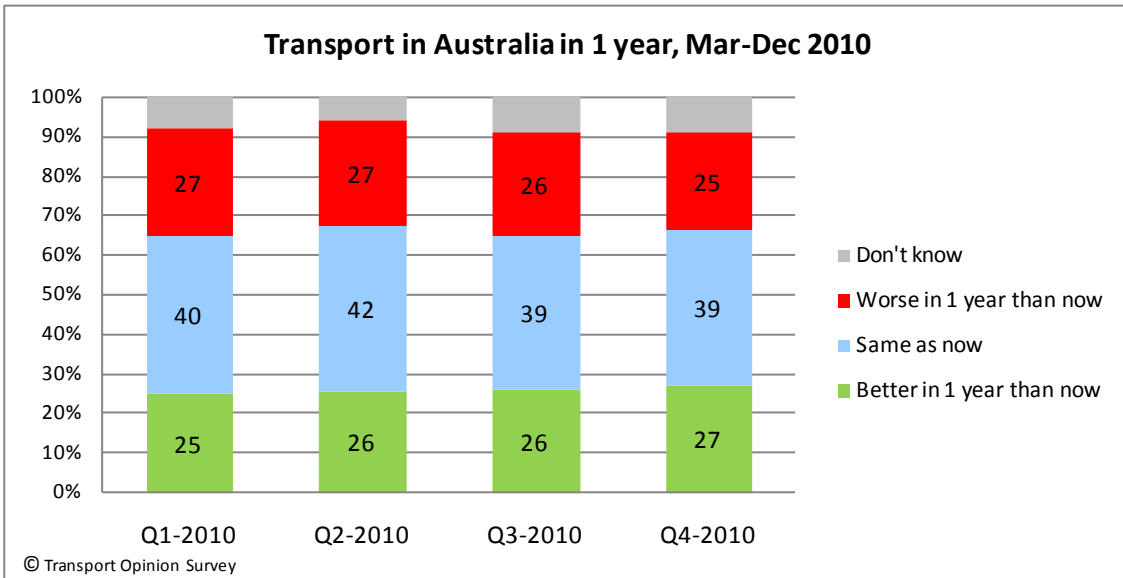


Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

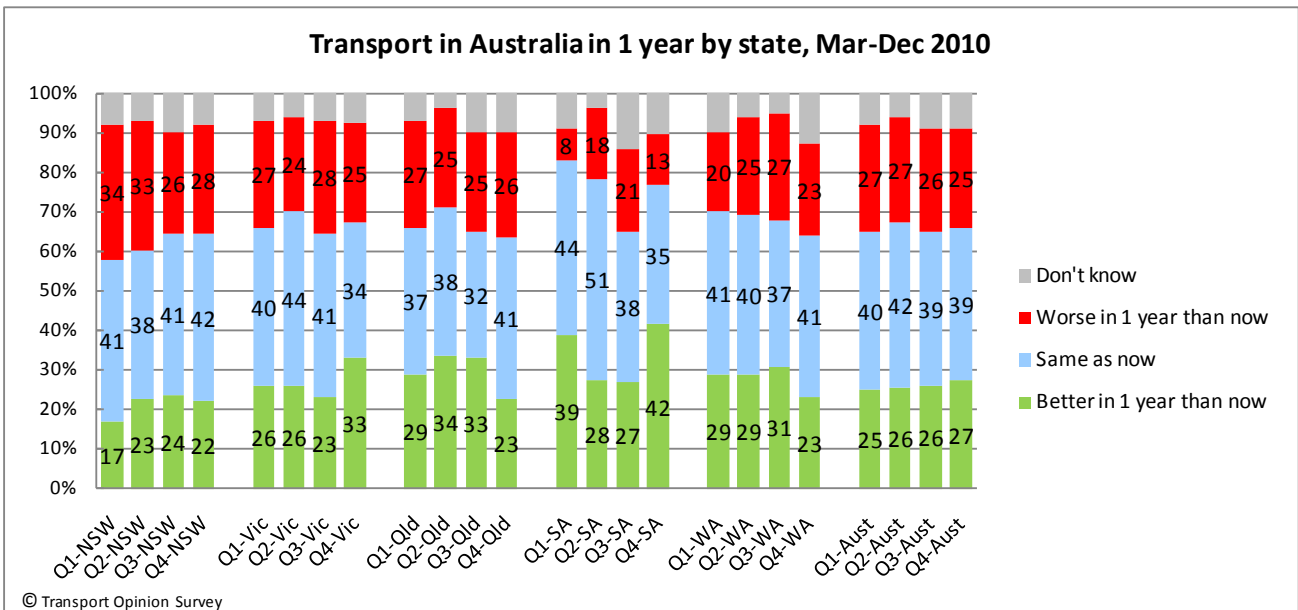
4. Confidence about transport improving in Australia

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 2010 quarter, a quarter of Australians (27%) think transport in Australia will be better in one year's time than now, while 25% think it will be worse. There was relatively little change following the federal election outcome which was confirmed during the December quarter.

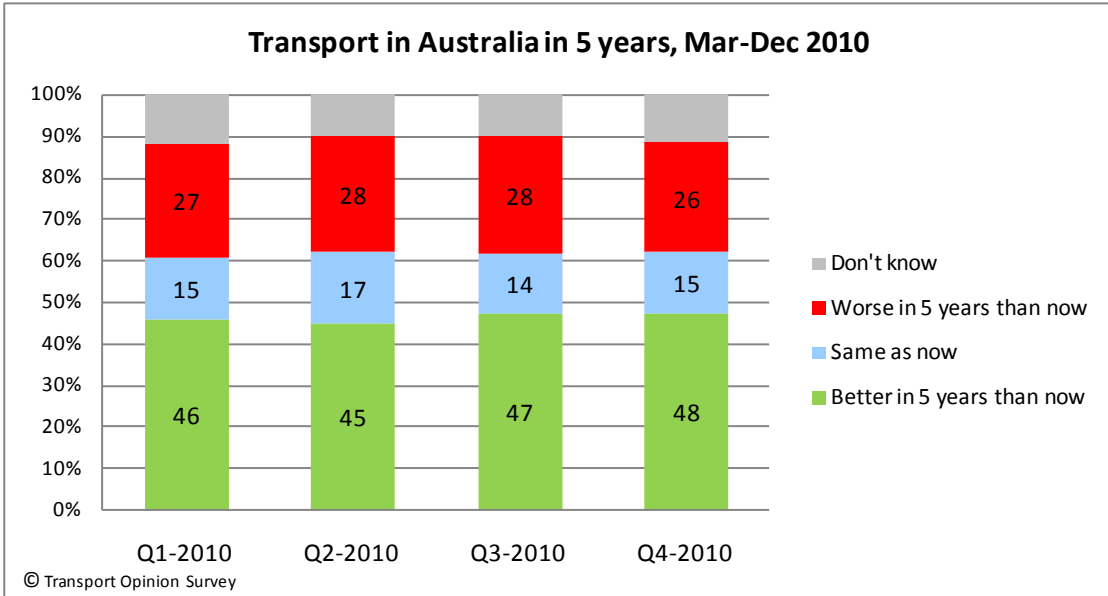


- There were variations by state in the December 2010 quarter. SA residents were the most confident, with 42% thinking transport in Australia will be better in one year. Victorian residents also became more confident transport will be better in Australia (33%, up from 23% last quarter), while Queensland residents became less confident (23%, down from 33% last quarter).

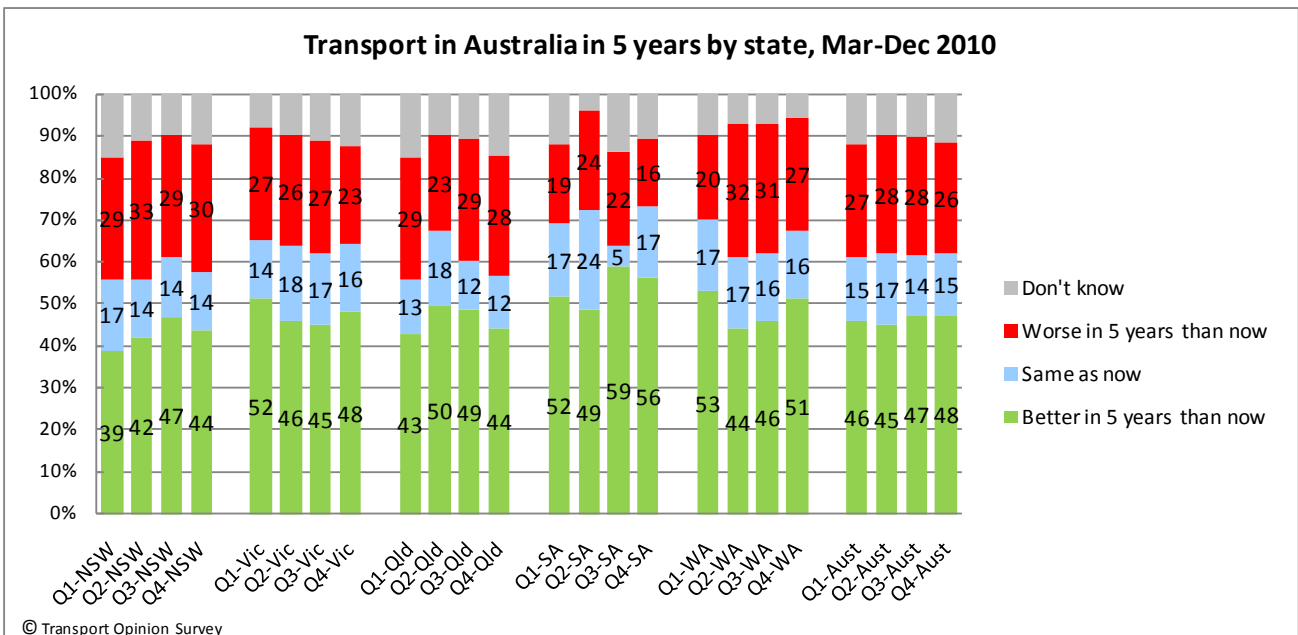


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the December 2010 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. The federal election outcome of a hung parliament with a Gillard Labor minority government for the next 3 years does not appear to have influenced confidence.



- In the December 2010 quarter, NSW was the least confident state, with 44% thinking transport will be better in five years (down from 47% last quarter) and 30% thinking transport will be worse. Queensland was similar, with 44% thinking transport will be better (down from 49% last quarter) and 28% worse. There was an increase in uncertainty in Queensland with 15% "don't know" (up from 11% last quarter).



5. Change in confidence over time – TOPS Index

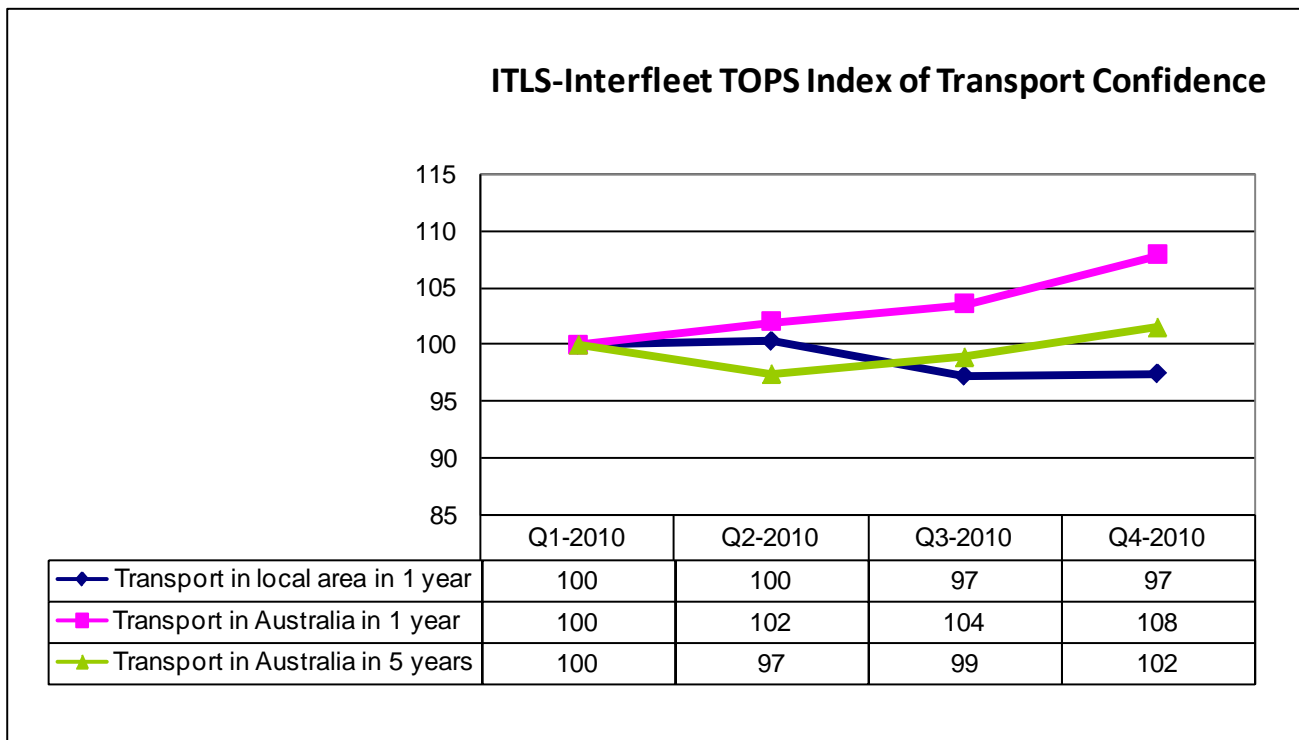
Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in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

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

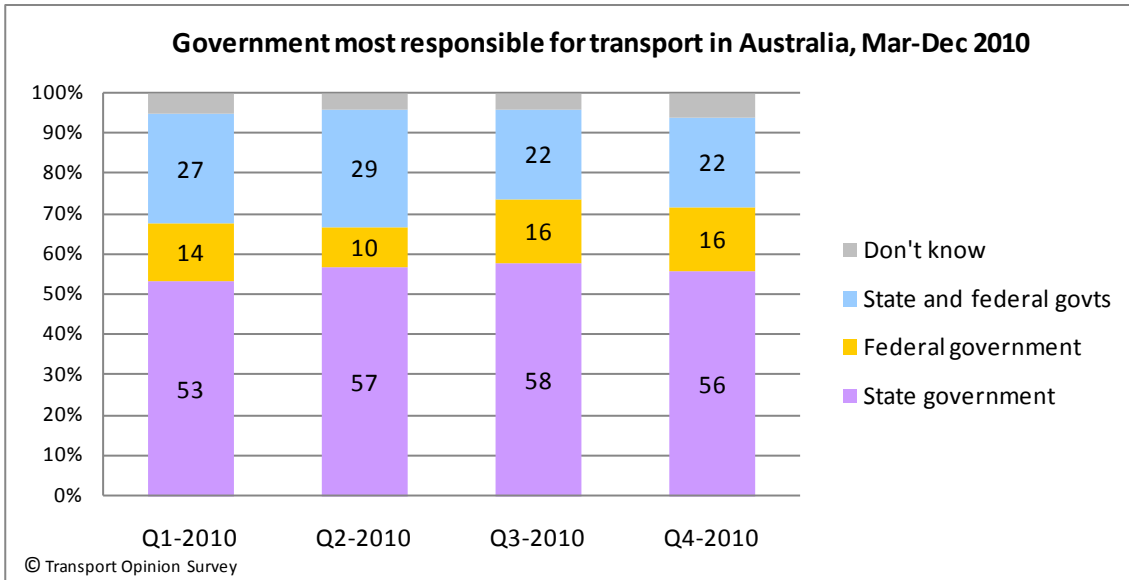
Compared to March 2010, Australians are less confident about transport in their local area, more confident about transport in Australia in one year, and feel about the same about transport in Australia in five years.



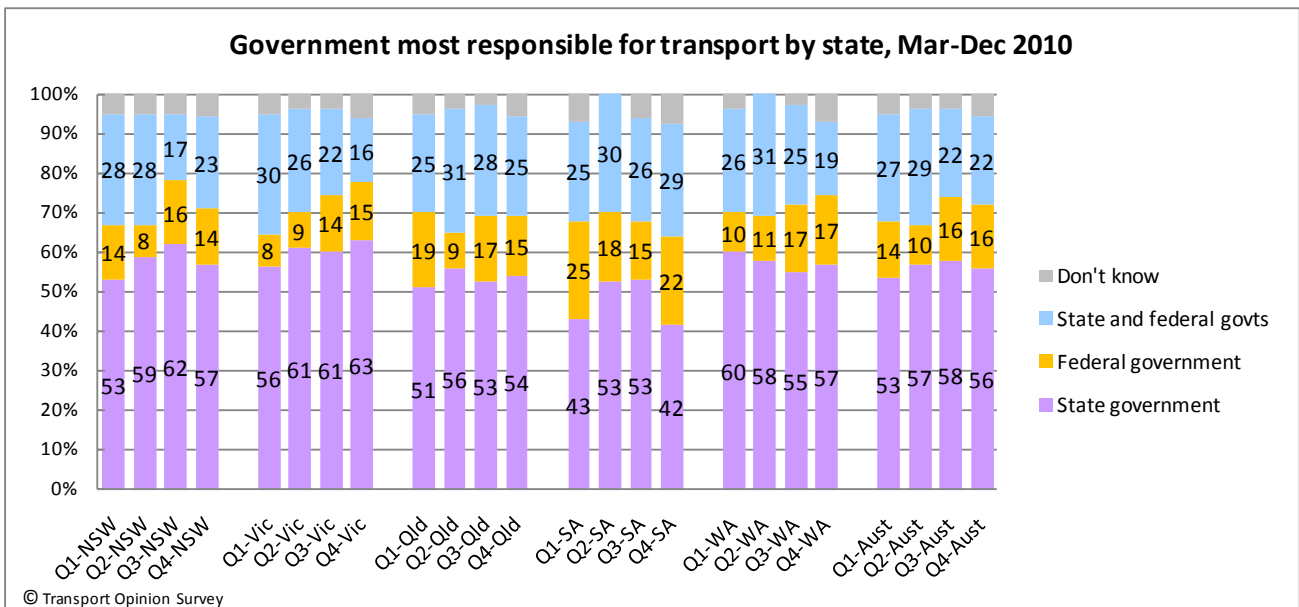
6. Government responsibility for transport

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

- In the December 2010 quarter, 56% of Australians said their state government is most responsible for transport. 16% nominated the Australian federal government as most responsible, similar to the last quarter, which included transport announcements during the federal election campaign.



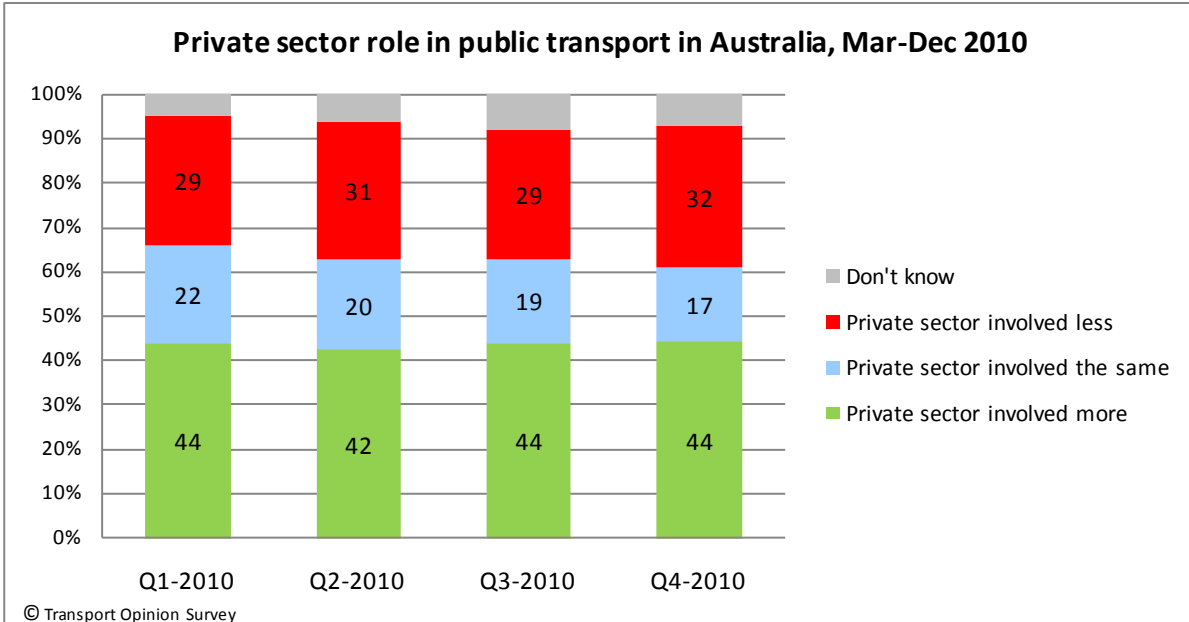
- Of all the states, Victorians said their state government is most responsible for transport (63%). The state election on 27 November focused attention on the state government role in transport. In SA, there was a decrease in residents saying their state government is most responsible (42%, down from 53% last quarter), and an increase in the federal government most responsible (22%, up from 15% last quarter).



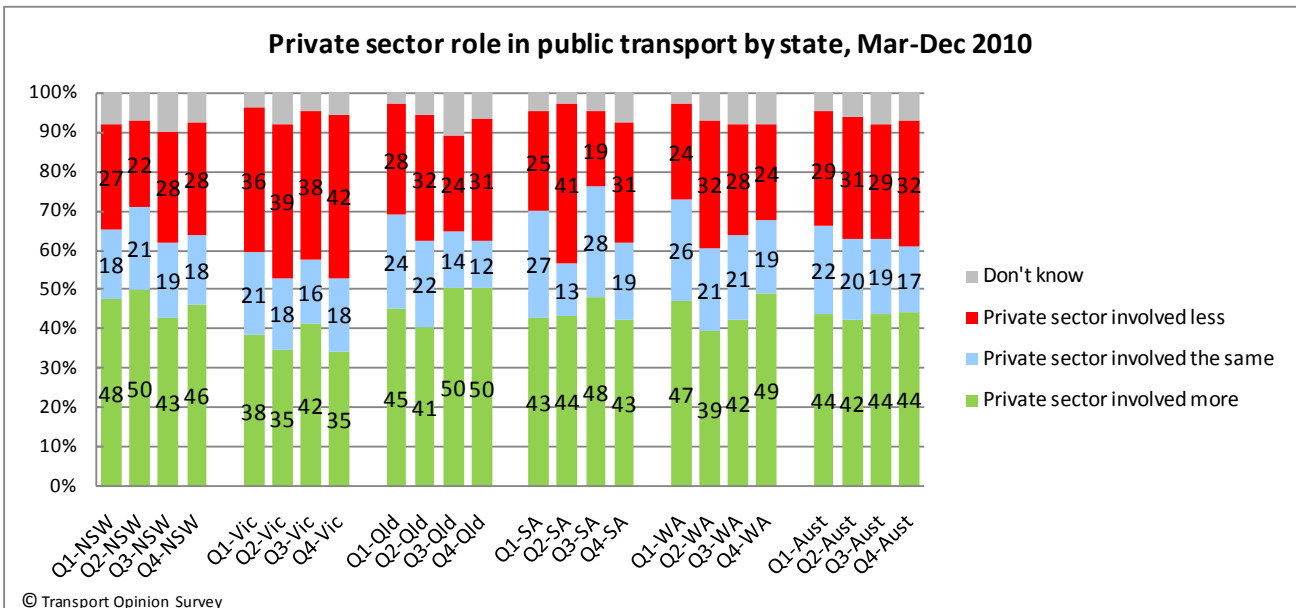
7. Private sector involvement in public transport provision

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 December 2010 quarter, 44% of Australians said the private sector should be involved more in the provision of public transport, while 32% said the private sector should be involved less.



- In the December 2010 quarter, Victoria was the only state in which more residents supported less private sector involvement in public transport (42%) rather than more involvement (35%, down from 42% last quarter). Provision of transport has been an issue in the lead-up to the Victorian state election on 27 November.



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.

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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