

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

Quarter 3, September 2011

Highlights

Transport stable as highest priority issue

- In the September 2011 quarter, 8% of Australians nominated transport and 12% nominated infrastructure as one of the two highest priority issues in Australia today, a slight decline from the last quarter, with transport highest in NSW (10%).

Public transport the highest priority for transport

- Half of Australians (51%) said the highest priority issue for transport in Australia is public transport improvements, compared to 25% for road improvements. Support for public transport continued to be highest in Victoria (60%).

Confidence about transport in local area

- In the September 2011 quarter, Australians were slightly more confident about transport in their local area in one year's time. 22% of Australians said transport in their local area will be worse in one year's time, and 20% said it will be better. Victoria had an increase in confidence after the large decline in confidence last quarter.

Views stable on transport in Australia in short-term

- Over a quarter of Australians think transport in Australia will be better in one year's time (26%) and over a quarter think transport will get worse (26%), similar to results last quarter.

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 (48%) thinking transport in Australia will be better in five years.

Views on transport fuel in the carbon tax

- 63% of Australians said fuel for buses should not be included in the federal government's proposed carbon tax, disagreeing with the government proposal to include buses from 2014 which may increase the price of public transport. A quarter of respondents (24%) said fuel for buses should be included. A similar proportion (62%) said fuel for household vehicles should not be included, in support of the government proposal. One in five Australians made a distinction between fuel for household vehicles and fuel for buses in the carbon tax.
- Responses indicated Australians are still developing an understanding of the carbon tax, its complexities and its implications.

About the Transport Opinion Survey

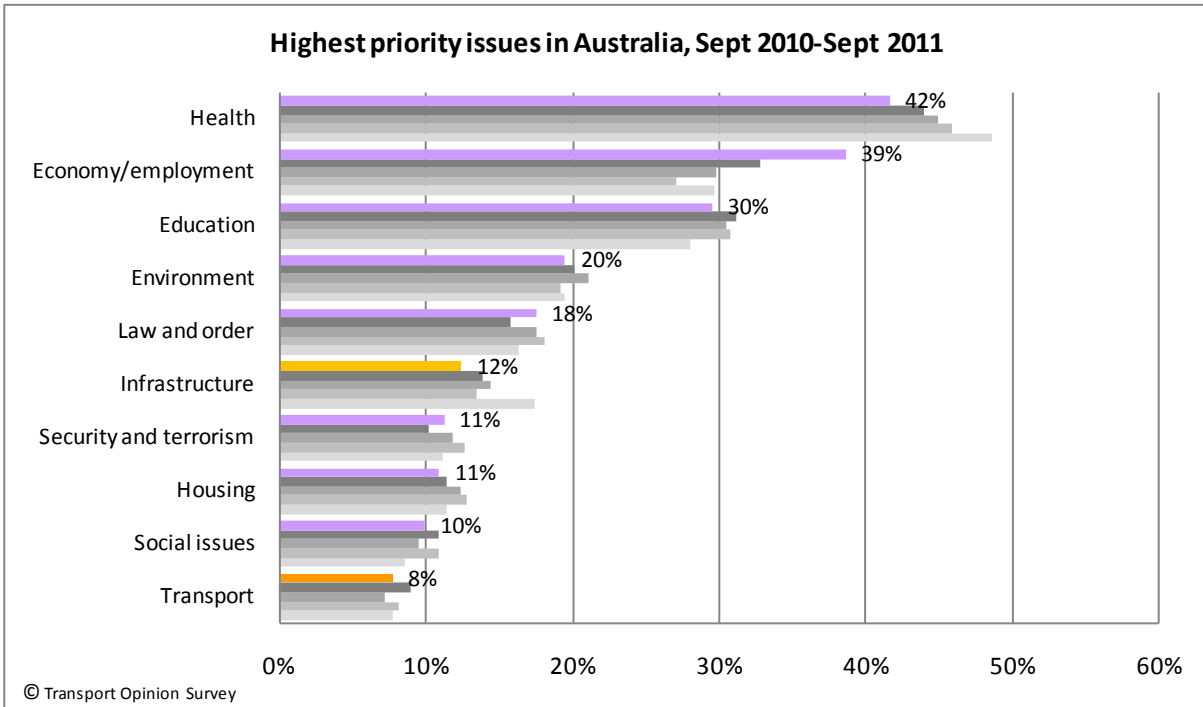
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained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

The Quarter 3, September 2011 survey was conducted over 11-25 August 2011. Current issues in the quarter included the release of details on the federal government's carbon price, and concern over global economic conditions.

1. Transport as a national priority

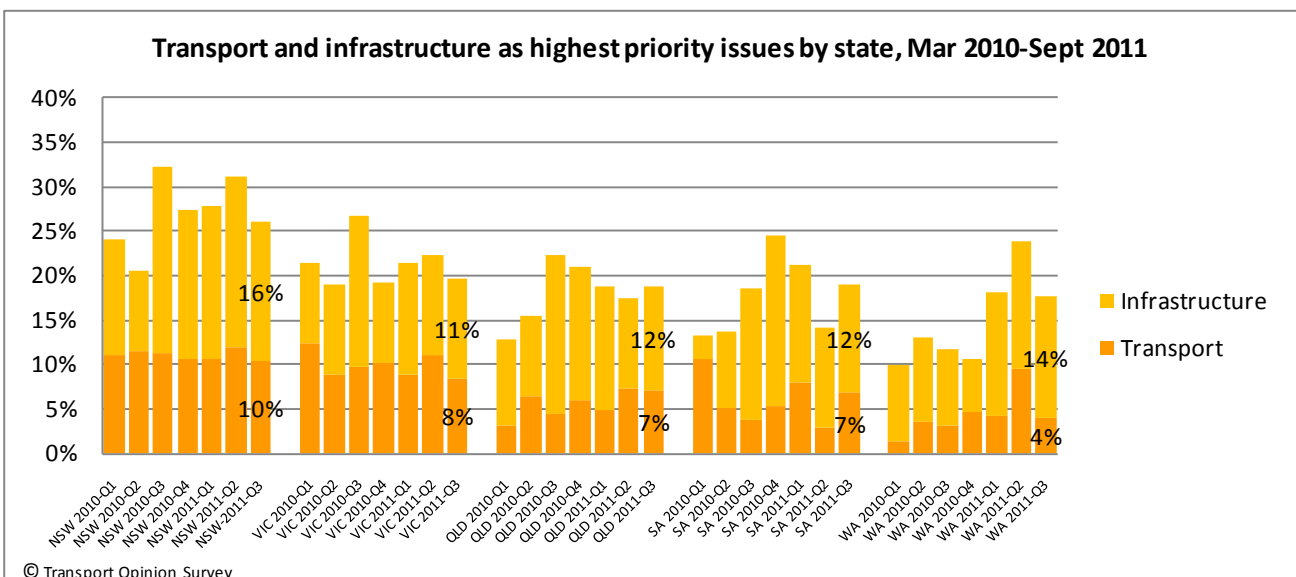
Which two of these issues [from list of 10 issues in random order] do you think are the highest priority in Australia today?

- In the September 2011 quarter, health remained the highest priority issue in Australia today: health was nominated by 42% of Australians as one of the two highest priority issues. Economy/employment was nominated by 39% of Australians, a large increase from 33% last quarter.
- In the September 2011 quarter, 8% of Australians nominated transport as one of the two highest priority issues in Australia today (down from 9% last quarter), and 12% nominated infrastructure (down from 14% last quarter).



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

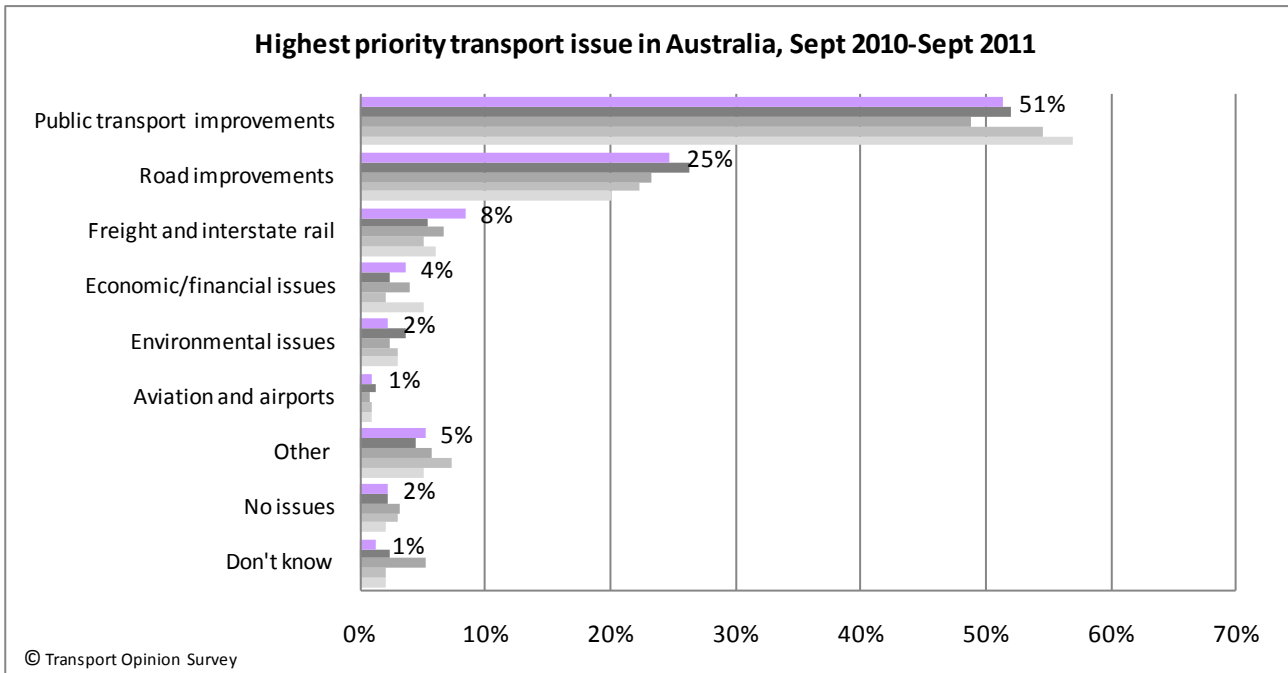
- In the September 2011 quarter, transport remained most important in NSW (10%) and Victoria (8%).



2. Highest priority issue for transport

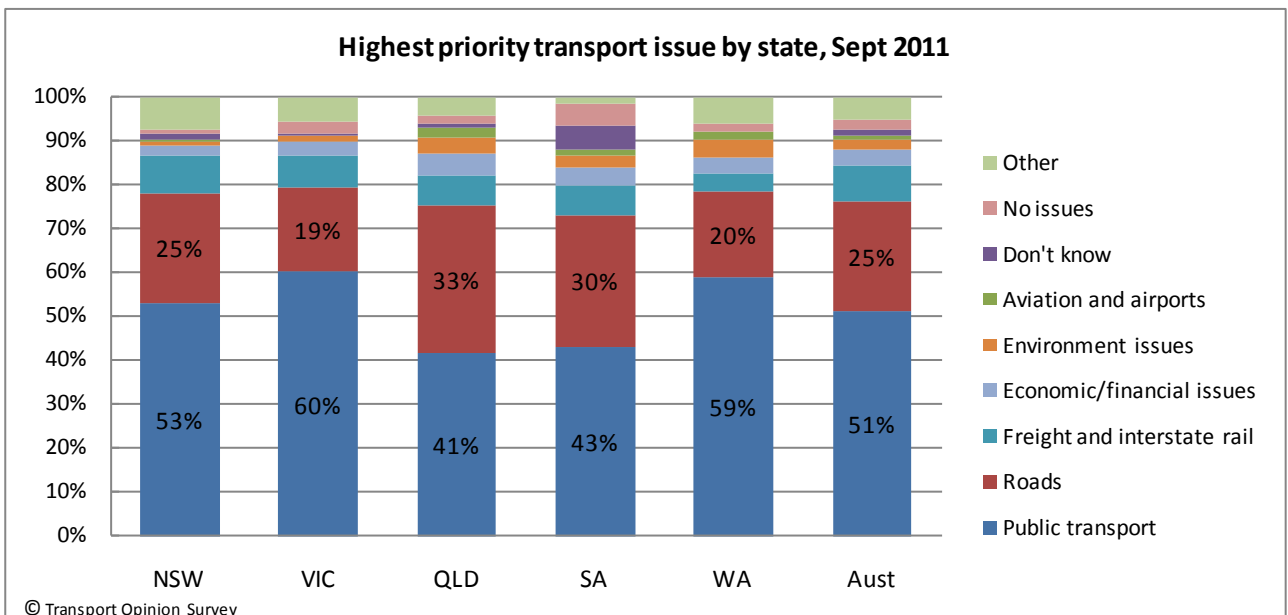
What do you think is the highest priority issue for transport in Australia now?

- In the September 2011 quarter, half of Australians (51%) said the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue in the seven quarters of the survey. A quarter of Australians (25%) said road improvements are the highest priority issue in transport.



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

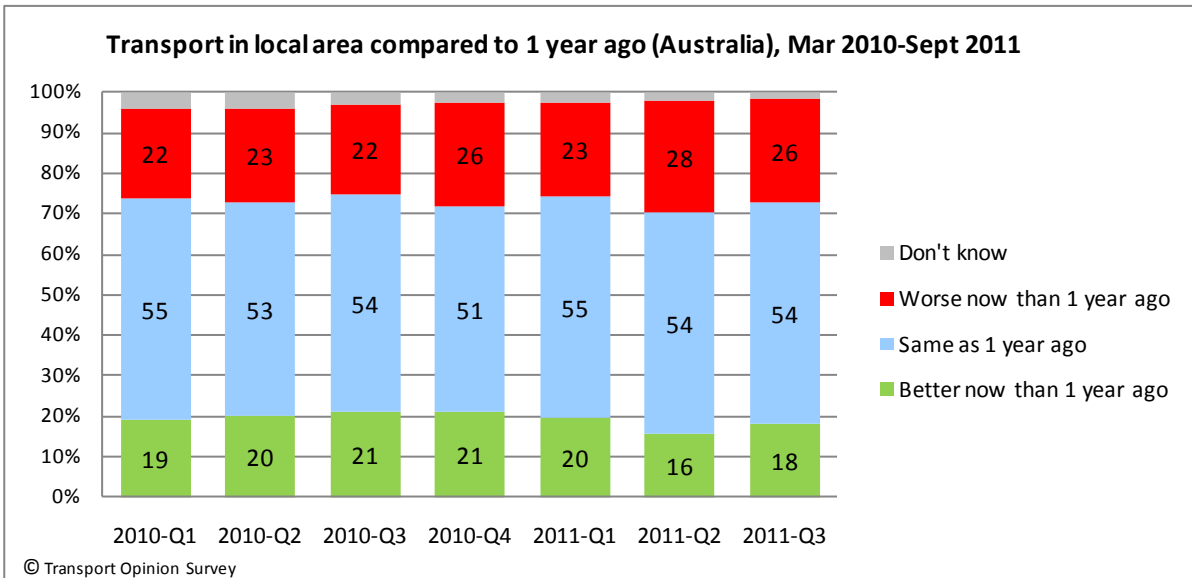
- Public transport improvements was the highest priority issue in transport in every state, as it was in the previous quarter, with the highest support for public transport in Victoria (60%).



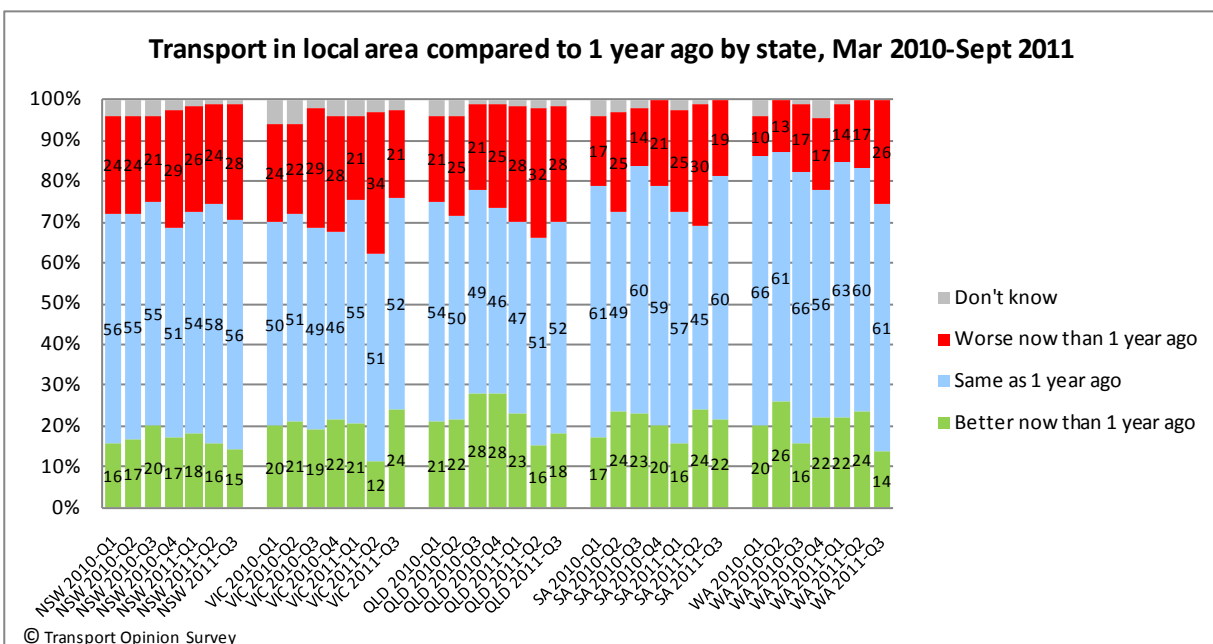
3. Confidence about transport improving in local area

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 2011 quarter, there was an increase in Australians who said transport in their local area was better now than one year ago (18%, up from 16% last quarter), and a corresponding decrease in those who said transport was worse now than one year ago (26%, down from 28% last quarter).

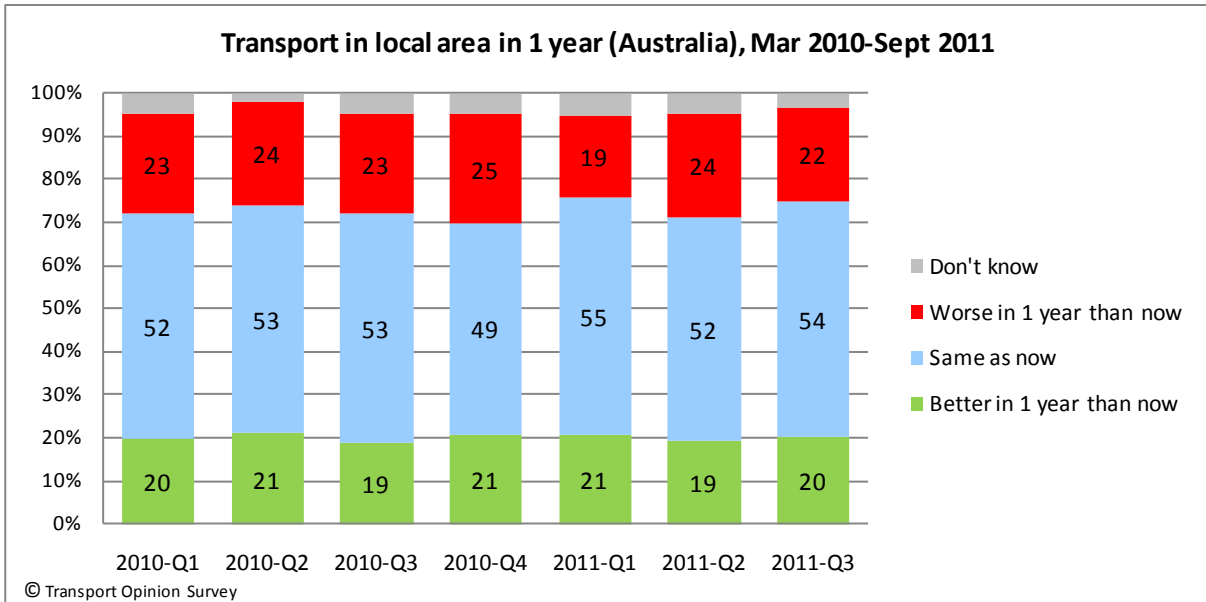


- In the September 2011 quarter, there was a marked increase in confidence in Victoria compared to last quarter, with an increase in residents who said transport in their local area is better than one year ago (24%, up from only 12% last quarter) and a decrease in residents who said transport is worse than one year ago (21%, down from 34% last quarter). NSW had its lowest proportion of residents who said transport is better than one year ago (15%) since the survey started.

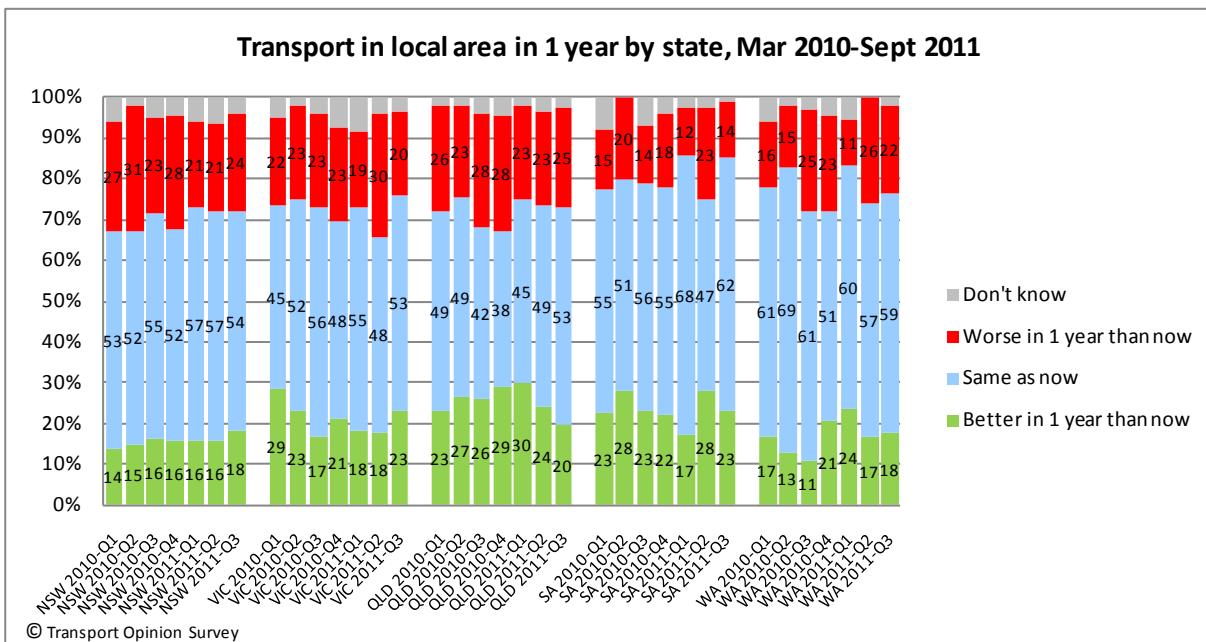


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In the September 2011 quarter, 20% of Australians said transport in their local area will be better in one year's time, while 22% said transport will be worse, a slight improvement in confidence since last quarter.

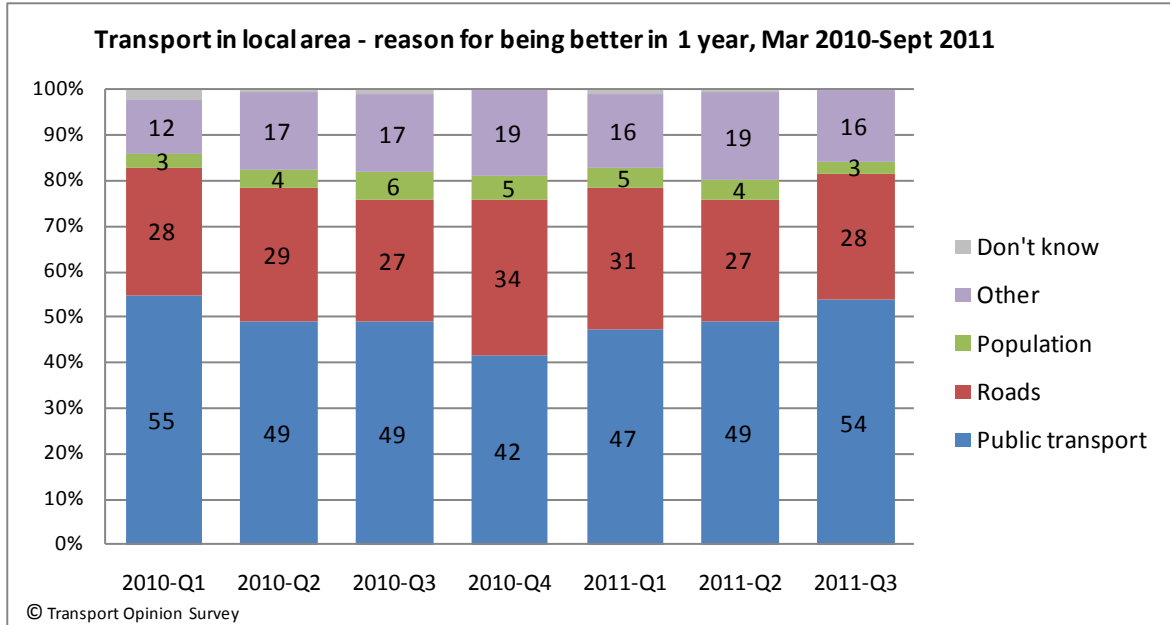


- In the September 2011 quarter, there was an improvement in confidence in Victoria, with a marked decrease in Victorian residents who said transport in their local area will be worse in one year (20%, down from 30% last quarter). Queensland had its lowest proportion of residents (20%) since the survey started who said transport will be better, and the highest proportion who said transport will be the same.



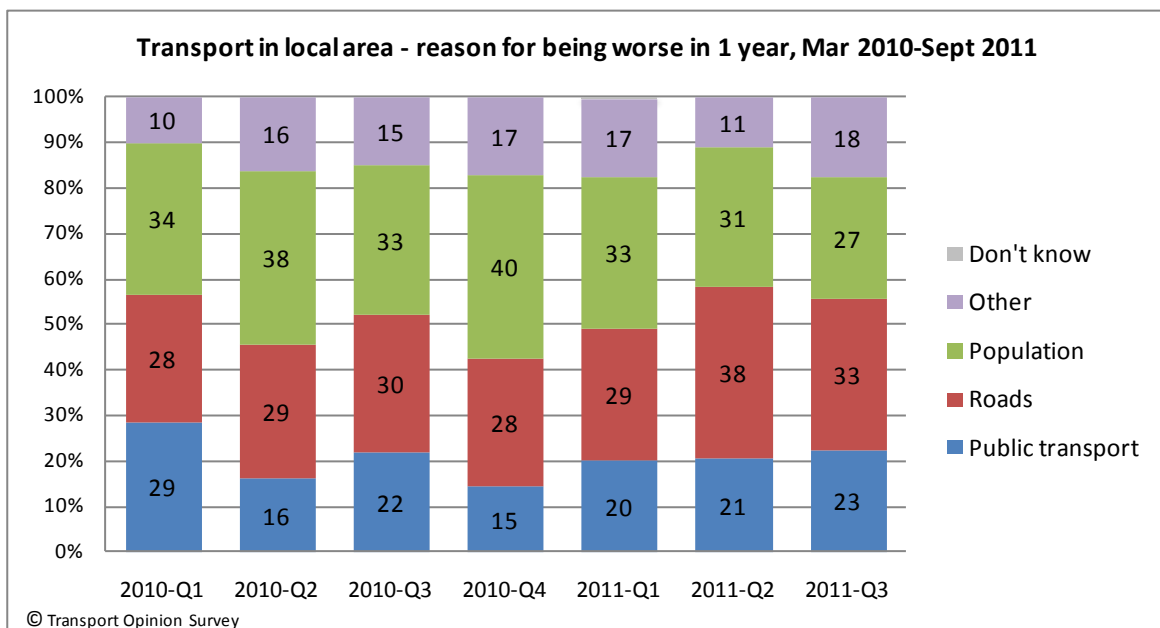
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the September 2011 quarter, the 20% of Australians who said transport in their local area will be better in one year were thinking about public transport (54%, up from 49% last quarter) more than roads (28%, up from 27% last quarter). "Other" includes 6% 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 September 2011 quarter, the 22% of Australians who said transport in their local area will be worse in one year were thinking about roads (33%, down from 38% last quarter) and population-related changes (27%, down from 31% last quarter). "Other" includes 6% thinking of the government role in integration, planning and coordination.

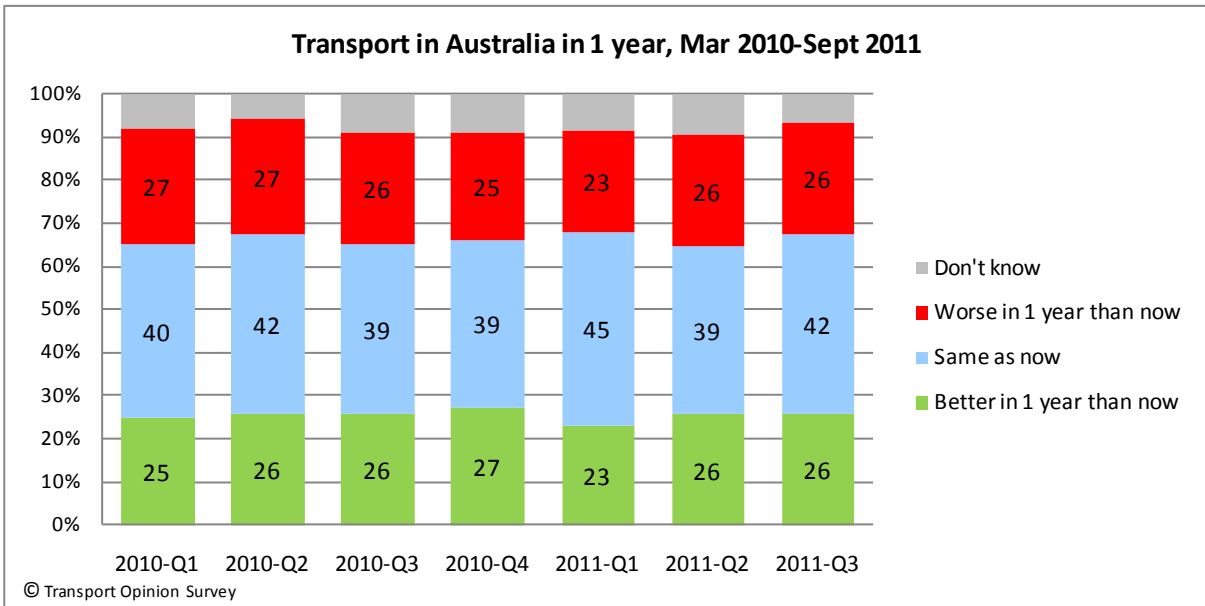


Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

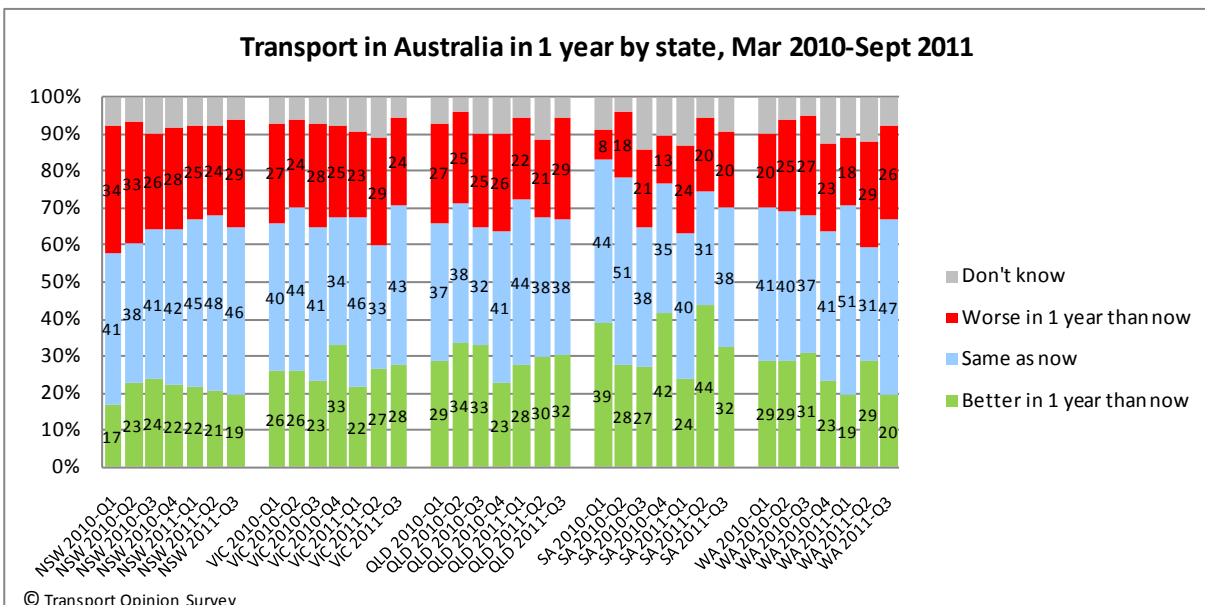
4. Confidence about transport improving in Australia

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 September 2011 quarter, over a quarter of Australians said transport in Australia will be better in one year's time (26%) and over a quarter said transport will get worse (26%), similar to results last quarter.

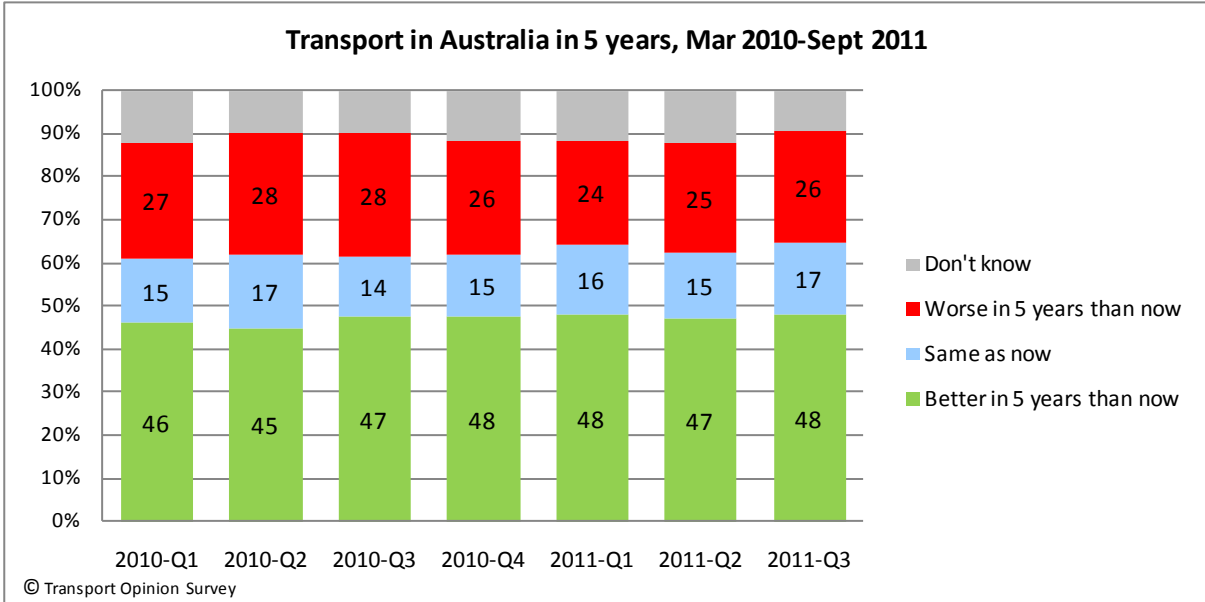


- In the September 2011 quarter, NSW remained the least confident of the states that transport in Australia will be better in one year.

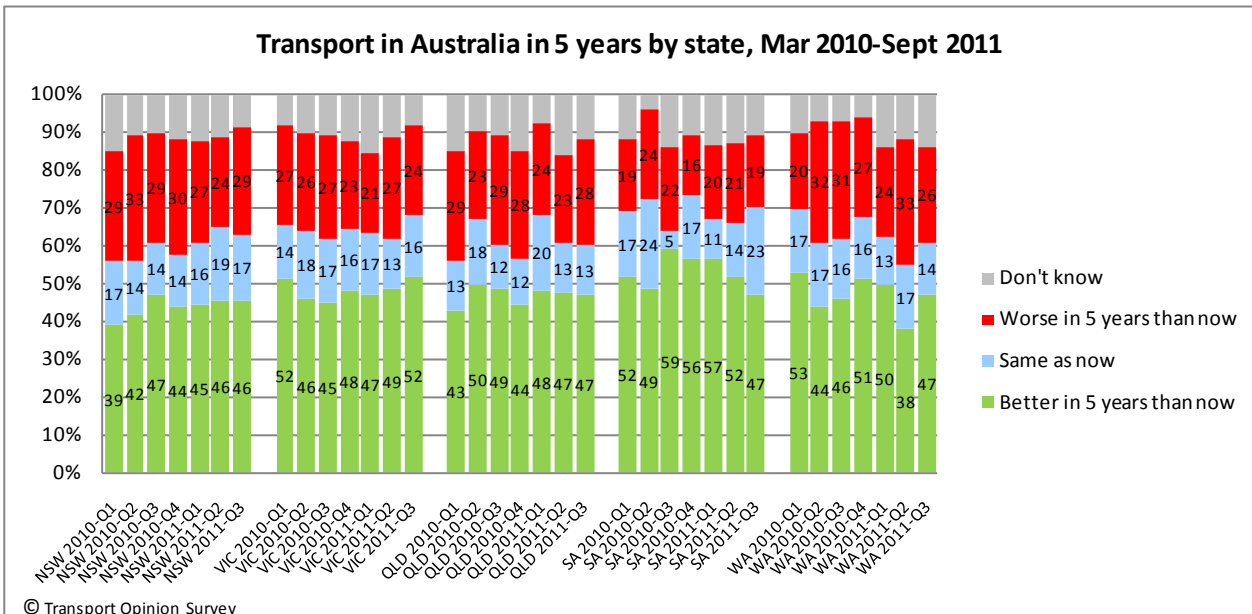


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the September 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 September 2011 quarter, Western Australia returned to previous levels of confidence about transport in Australia in five years after a marked decline in confidence last quarter. Victoria also had an increase in confidence about transport in Australia.



5. Change in confidence over time – TOPS Index

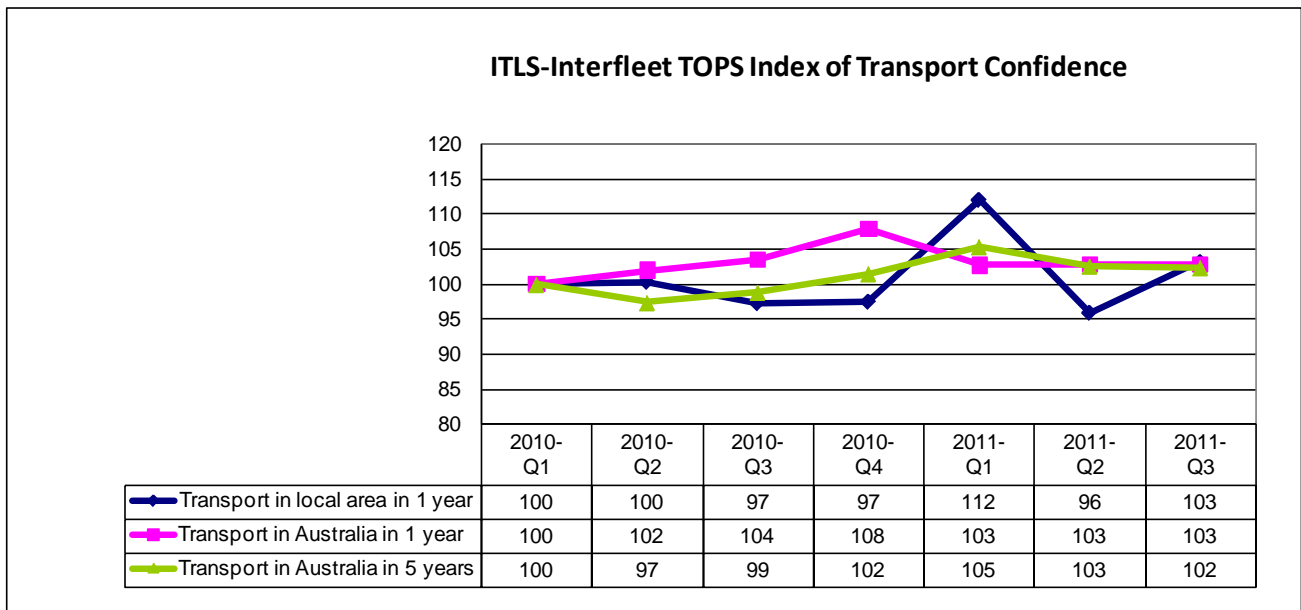
Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in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

- Australians became more 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 were unchanged in confidence about transport in Australia in five years' time.

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



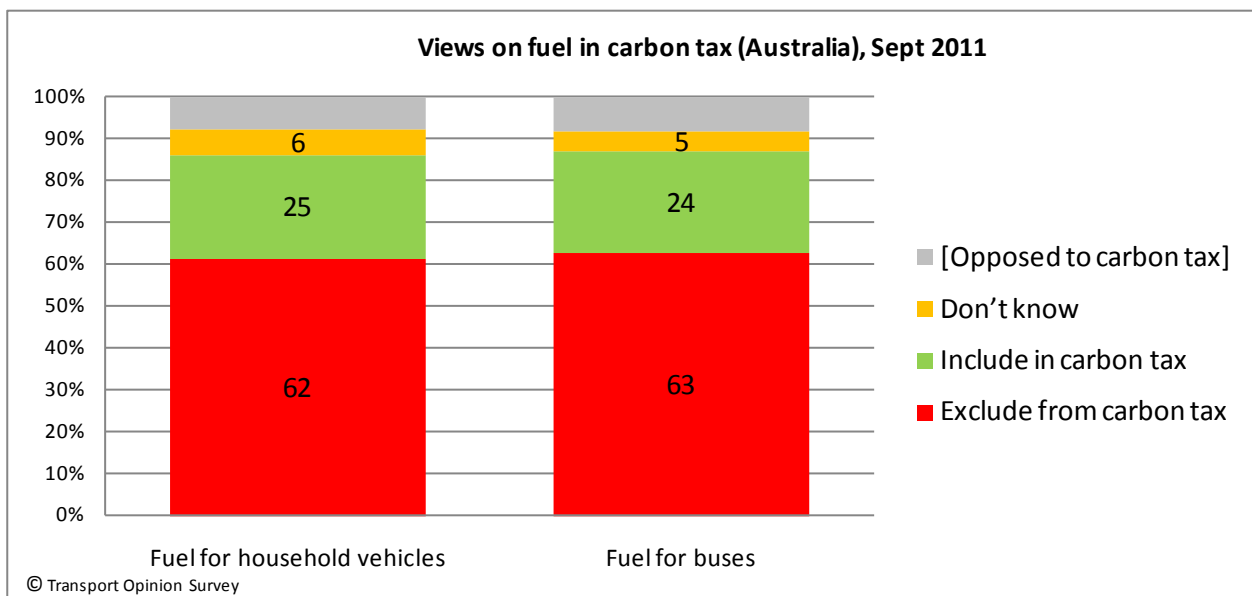
6. Fuel and the carbon tax

In the September 2011 quarter, two new questions were asked about including fuel in the federal government's proposed carbon tax. The government released details of its scheme on 11 July 2011, about a month before the survey.

Now considering the carbon price, the federal government has announced that fuel for household vehicles WILL NOT be included in the carbon price. Do you think fuel for household vehicles should be excluded or included in the carbon tax?

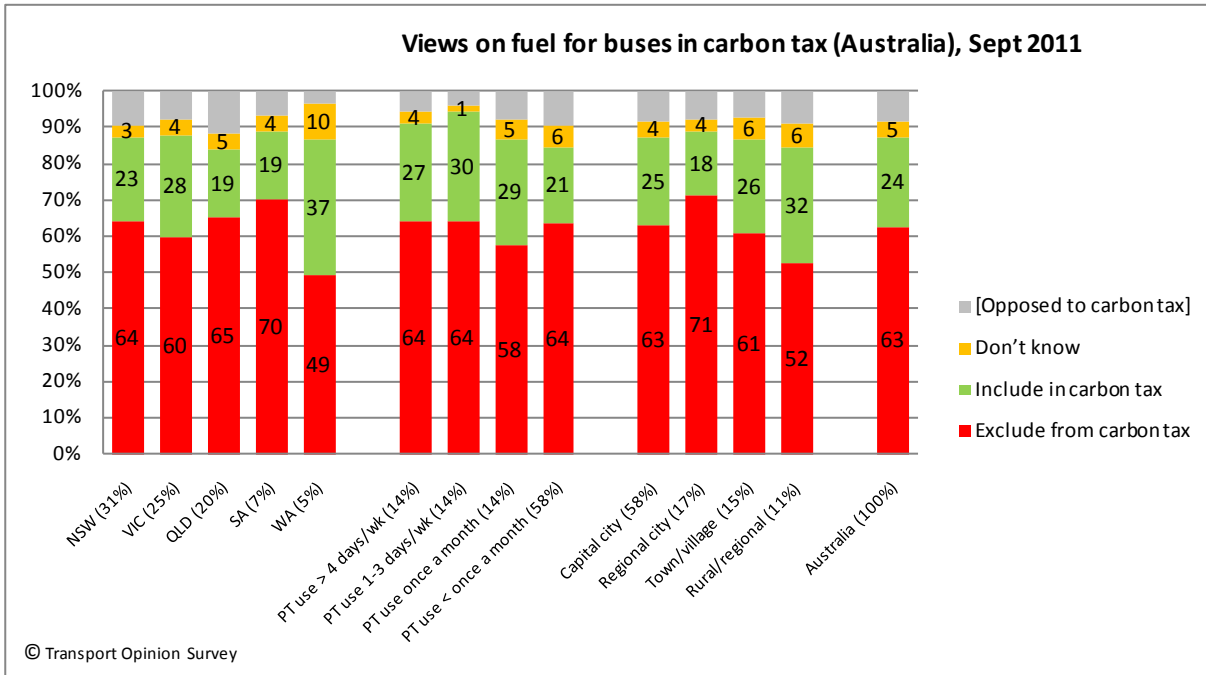
On the other hand, fuel for buses WILL BE included in the carbon price from 2014 which may increase the cost of public transport. Do you think fuel for buses should be excluded or included?

- A similar proportion of Australians, just under two-thirds of Australians, said that fuel for household vehicles (62%) and that fuel for buses (63%) should not be included in the carbon tax. For fuel for household vehicles, responses were in support of government policy. However, most people disagreed with government policy to include buses in the carbon tax from 2014 which may increase the cost of public transport. About a quarter of Australians (24%) said that fuel for buses should be included in the carbon tax.
- One in five respondents (20%) made a distinction between fuel for household vehicles and fuel for buses in the carbon tax. In terms of consistency of answers to the two questions about fuel for vehicles and fuel for buses:
 - 49% of respondents said exclude fuel for both household vehicles and buses from the carbon tax
 - 13% of respondents said include fuel for both household vehicles and buses
 - 11% of respondents said include fuel for household vehicles, but exclude buses
 - 10% of respondents said exclude household vehicles and include buses
 - 17% of respondents were unable to answer (with 9% "don't know" and 8% strongly opposed to the carbon price).



Note: The questions asked whether fuel should be excluded or included in the carbon tax. Interviewers coded responses as "opposed to the carbon tax" if the respondent's strong views prevented a response of "excluded" or "included" or as "don't know" if respondents were unable to answer.

- There was some variation in views on including fuel for buses in the carbon tax by state and by location, but little variation by public transport use. Frequent public users had the same view as infrequent public transport users. Responses suggest that Australians are still developing an understanding of the carbon tax, its complexities and its implications.



Note: The questions asked whether fuel should be excluded or included in the carbon tax. Interviewers coded responses as “opposed to the carbon tax” if the respondent’s strong views prevented a response of “excluded” or “included” or as “don’t know” if respondents were unable to answer.

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.

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 provides education and conducts research in transport, logistics and supply chain management.

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