

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

Quarter 2, June 2010

Highlights

- In the June 2010 quarter, one in five Australians nominated either transport (8%) or infrastructure (10%) as one of the two highest priority issues in Australia today.
- Over half of Australians (53%) said the highest priority issue for transport in Australia is public transport improvements, more than double who said road improvements were the highest transport priority (22%).
- One in five Australians (20%) think transport in their local area improved in the last year, similar to the previous quarter. There was little change compared to the previous quarter for NSW and Victoria residents.
- Only one in five Australians (21%) think transport in their local area will be better in one year's time, with about half thinking it will be unchanged. NSW became even more negative, with 31% of residents (up from 27% last quarter) saying transport in their local area will get worse, Queensland residents became more positive (27%, up from 23%) and SA residents became more polarised.
- The TOPS Index shows that in the June 2010 quarter Australians were slightly more confident about transport in Australia in one year's time and slightly less confident about transport in Australia in five years time, compared to the previous quarter.
- A quarter of Australians (26%) think transport in Australia will be better in one year's time than now, while slightly more (27%) think it will be worse, similar to the previous quarter. NSW residents, while still the least confident of any state, were more positive than the previous quarter. Queensland residents were also more positive than the previous quarter.
- Australians are more confident that transport in Australia will be better in five years than in one year, with almost half (45%) thinking transport in Australia will be better in five years, similar to the previous quarter. But there were major changes in confidence about future transport in Australia by state. WA residents had a major decline in confidence, with 32% (up from 20% last quarter) thinking transport in Australia will be worse in five years. However Queensland residents became more confident and NSW residents, still the least confident of any state, were more positive than the previous quarter.
- 57% of Australians think their state government is most responsible for transport, an increase compared to the previous quarter.
- 42% of Australians think the private sector should be involved more in the provision of public transport, while 31% think the private sector should be involved less, similar to the previous quarter. In the June 2010 quarter, Victoria was the only state where more residents want less private sector involvement in public transport, rather than more involvement.

About the Transport Opinion Survey

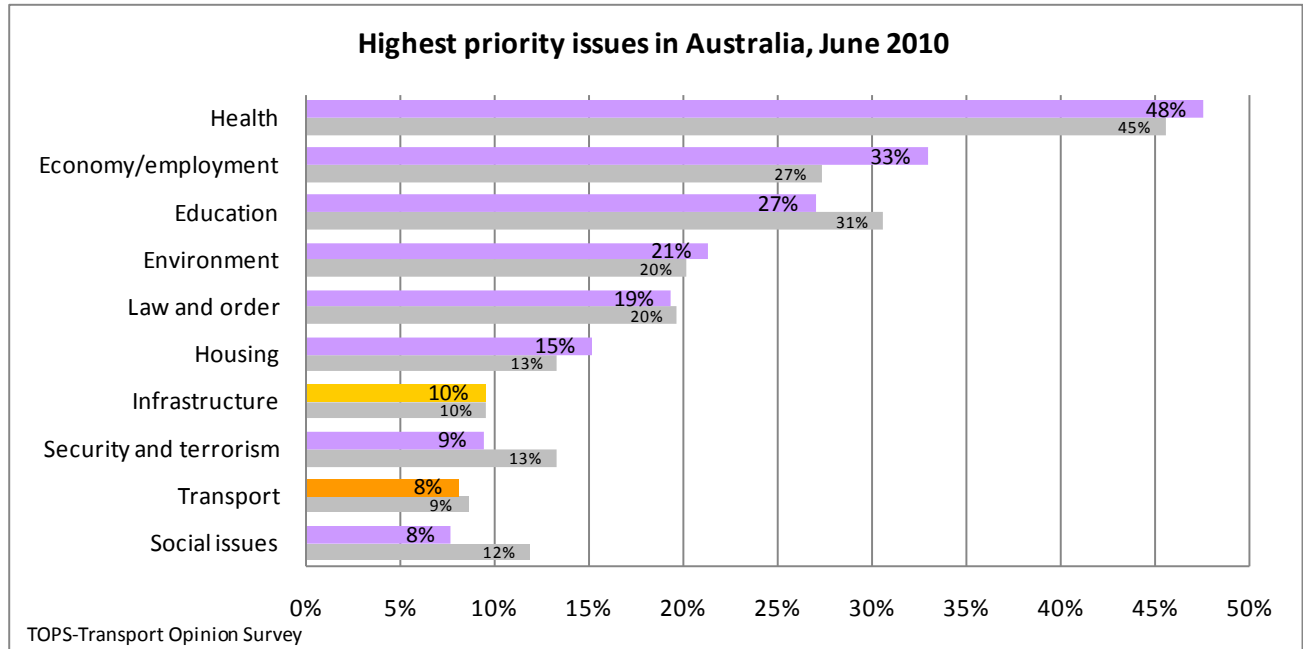
The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by Taverner Research by telephone using trained interviewers.

The Quarter 2, June 2010 survey was conducted over 15-30 May 2010. Current issues before and during the fieldwork included the change of government in WA, the Federal government's health reform plans, the Federal budget and resources super-profits tax, and the resignation of the Minister for Transport in NSW.

1. Transport as a national priority

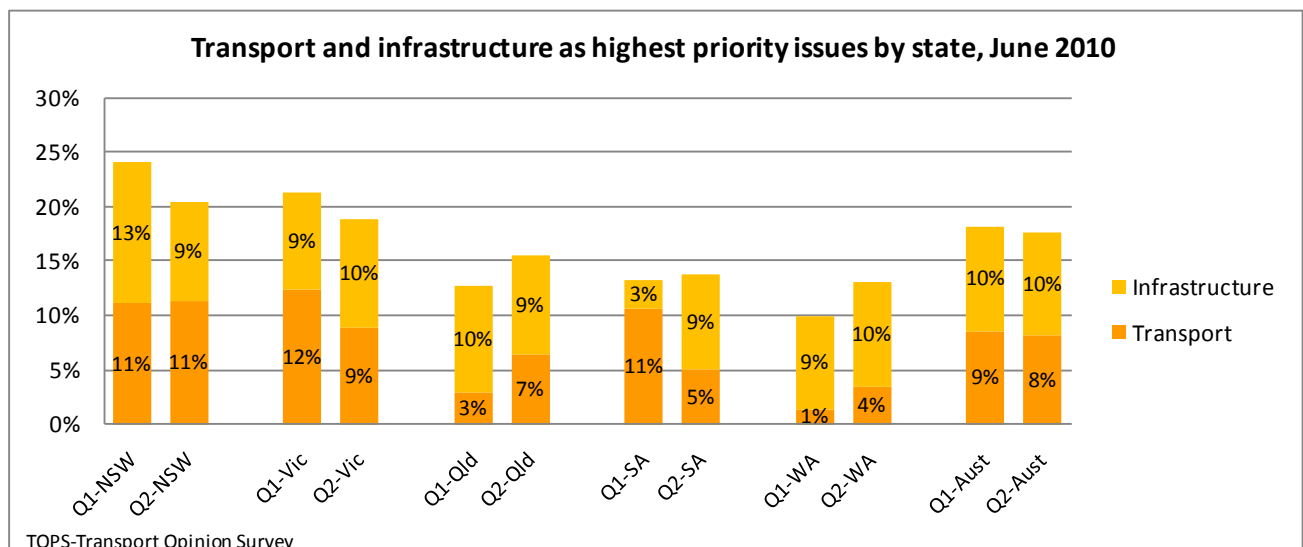
Which two of these issues [from list of 11 issues] do you think are the highest priority in Australia today?

- In the June 2010 quarter, health remained the highest priority issue in Australia today: health was nominated by 48% of Australians as one of the two highest priority issues, followed by economy/employment (33%) and education (27%).
- In the June 2010 quarter, one in five Australians nominated either transport (8%) or infrastructure (10%) as one of the two highest priority issues in Australia today, similar to results from the previous quarter.



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

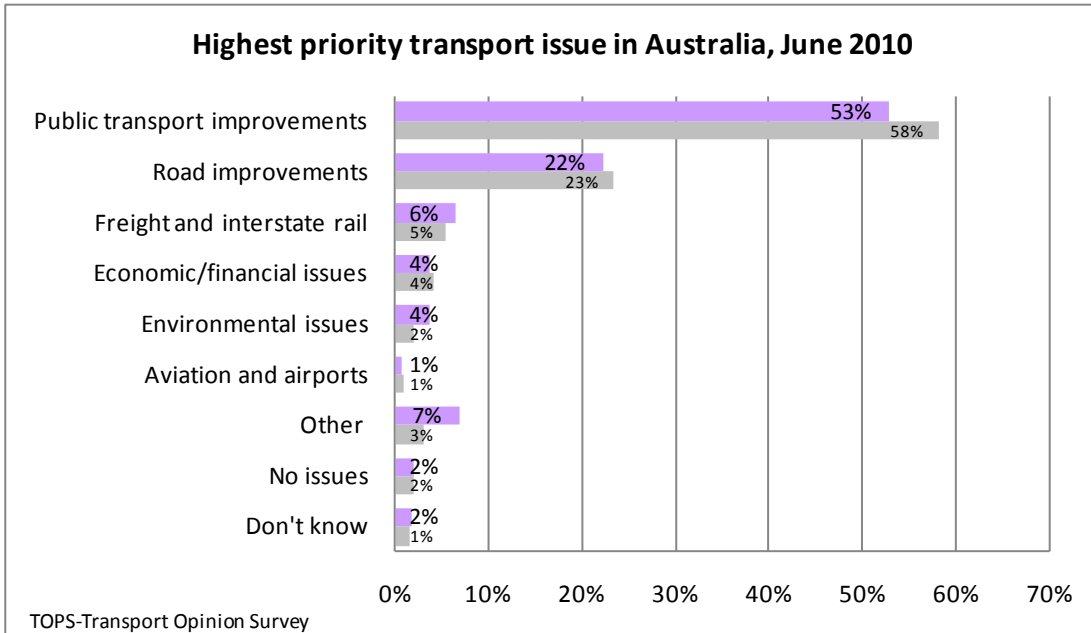
- In the June 2010 quarter, transport was a higher priority issue for NSW and Victorian residents than other states, while infrastructure as a priority issue was similar across the states.



2. Highest priority issue for transport

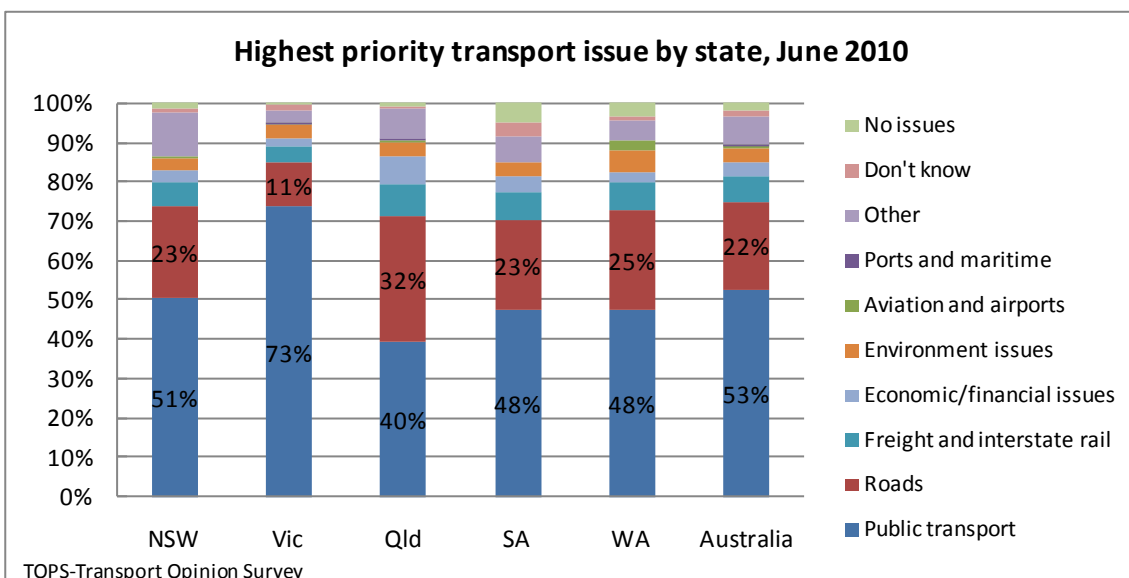
What do you think is the highest priority issue for transport in Australia now?

- In the June 2010 quarter, over half of Australians (53%) said the highest priority issue for transport in Australia is public transport improvements, which is a slight decrease compared to the previous quarter. A quarter of Australians (22%) said road improvements are the highest priority in transport.



Note: Responses were grouped into the above categories. Responses sum to 100%. Previous quarter (March 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.

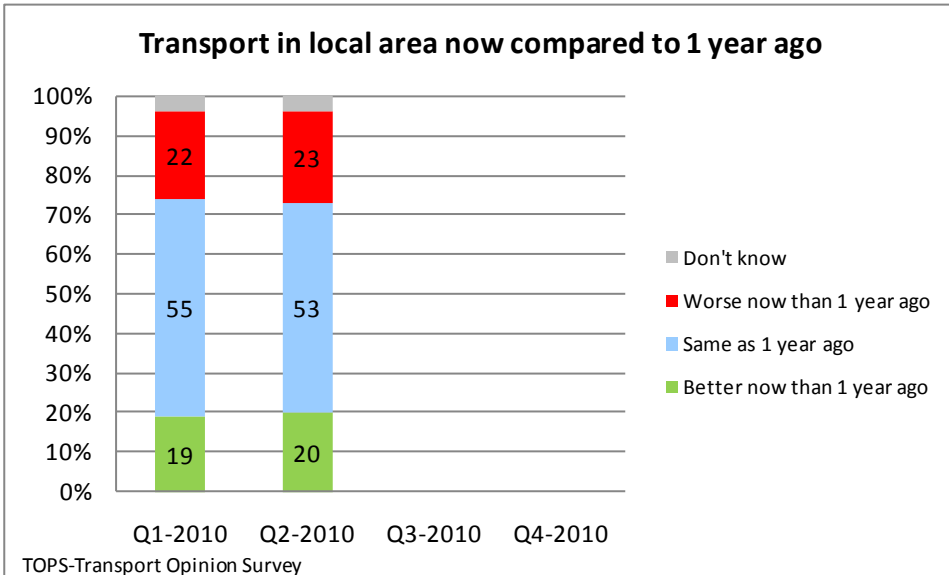
- Public transport improvements was the highest priority issue in transport in every state. Almost three-quarters of Victorians nominated public transport improvements as the highest priority issue in transport. Road improvements received the highest rating (32%) as the highest priority issue in transport in Queensland.



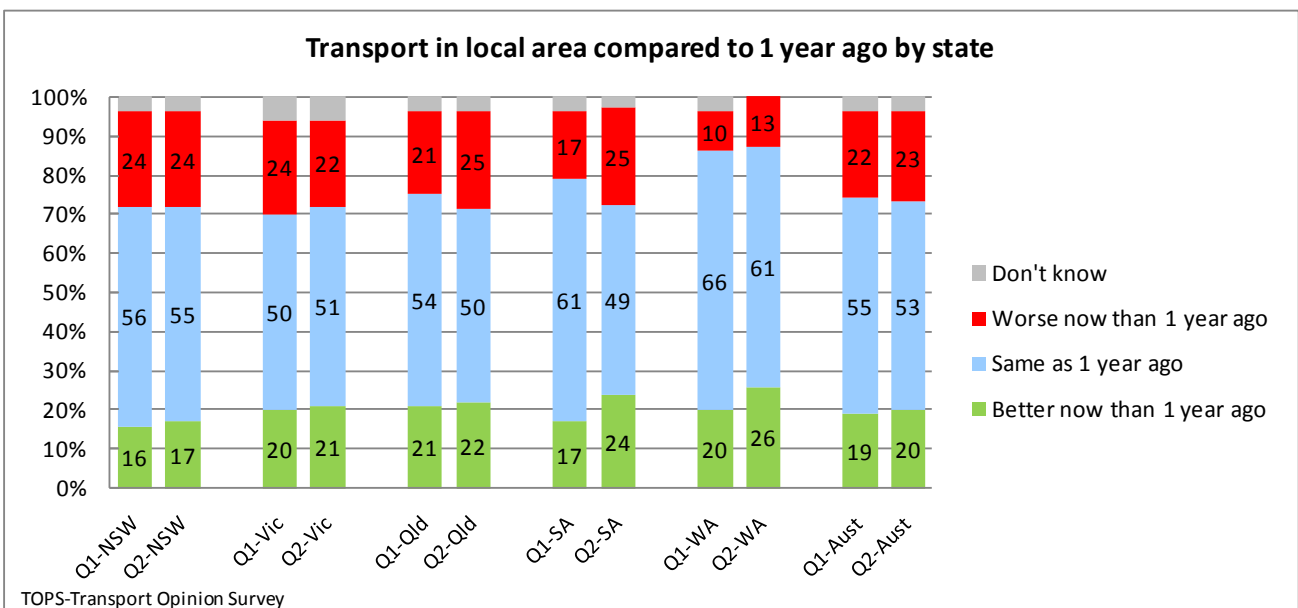
3. Confidence about transport improving in local area

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 June 2010 quarter, one in five Australians (20%) said transport in their local area improved in the last year, similar to the previous quarter.

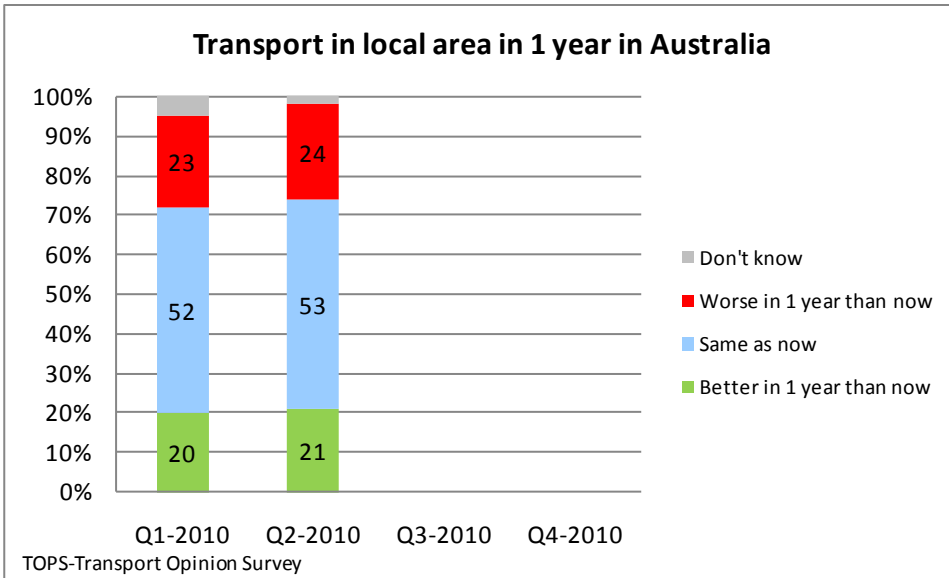


- There was little change compared to the previous quarter for NSW and Victoria residents. However, there was an increase in SA residents who said transport in their local area is worse than one year ago (25%, up from 17% last quarter), while there was an increase in WA residents who said transport in their local area is better than one year ago (26%, up from 20% last quarter).

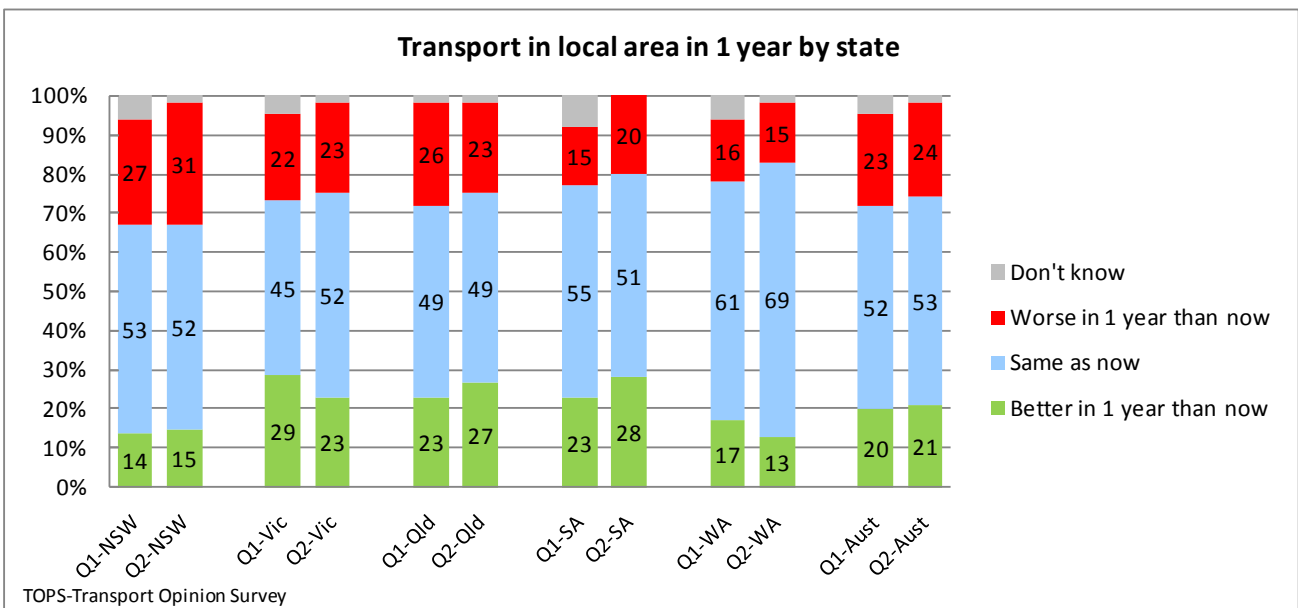


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In the June 2010 quarter, only one in five Australians (21%) 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. Overall, there was little change in Australians' views on transport in their local area in one year's time.

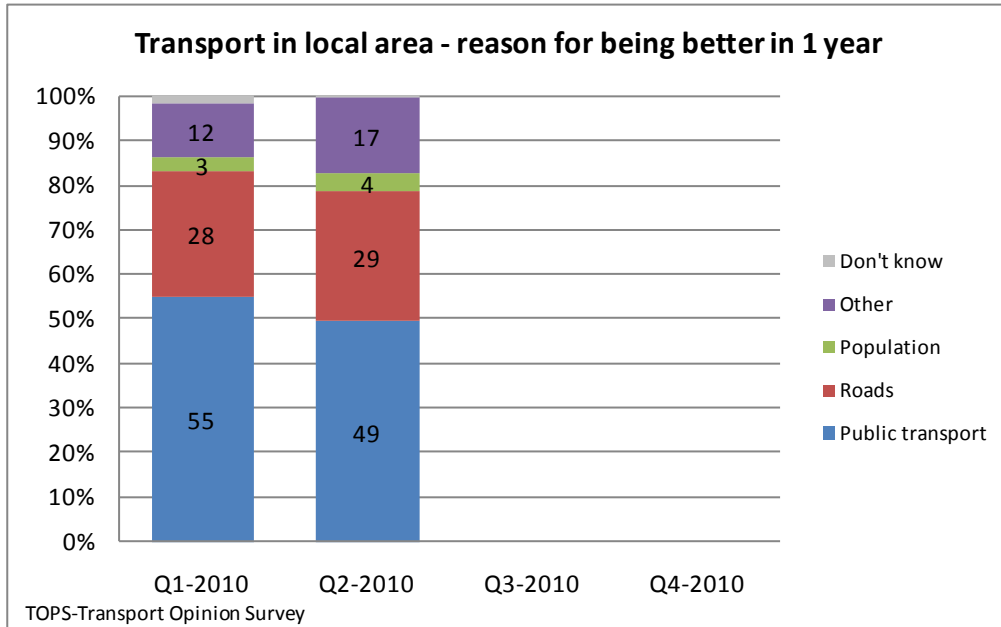


- However, there were changes by state. NSW residents were even more negative than last quarter, with 31% (up from 27% last quarter) saying transport in their local area will get worse. Queensland residents became more positive about their local areas (27%, up from 23%). SA residents became more polarised, with an increase in both better and worse, while most WA residents said transport in their local area will be the same in one year's time (69%, up from 61%).



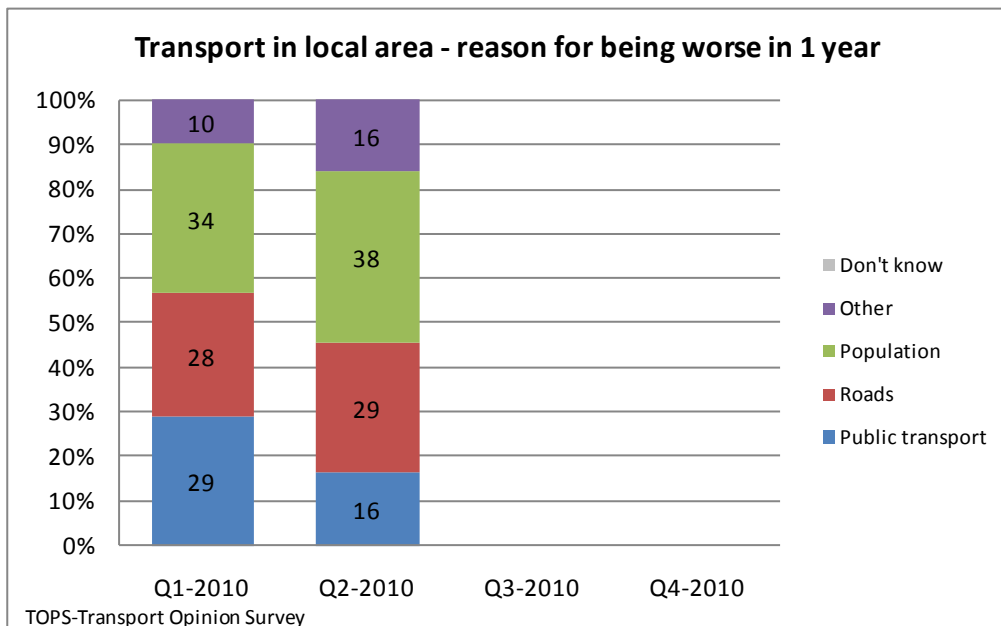
What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the June 2010 quarter, the 21% 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 (29%).



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 2010, the 24% of Australians who think transport in their local area is going to get worse in one year were thinking about population-related changes (38%) and roads (29%). There was a decrease in the proportion of people citing public transport (16%, down from 29% last quarter) as a reason for thinking transport in their local area will get worse.

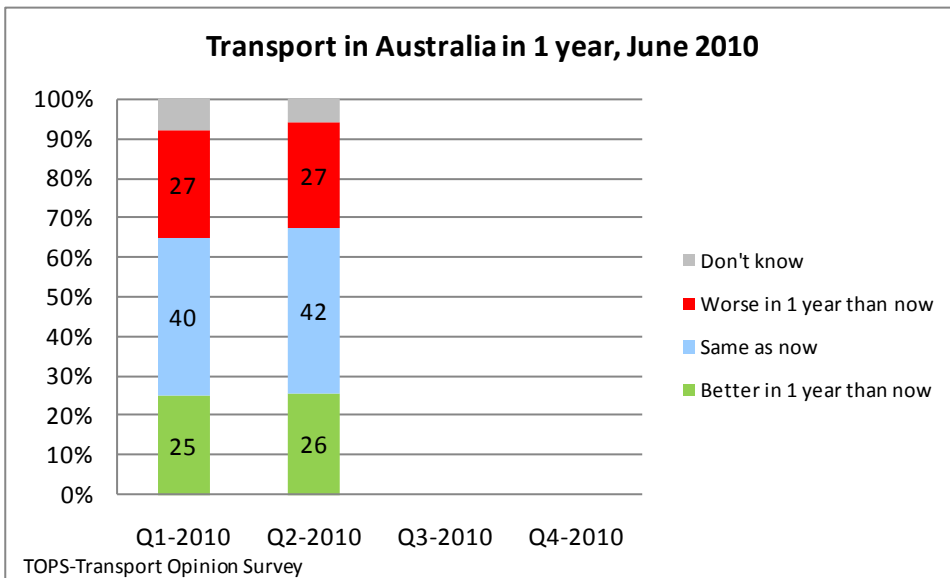


Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

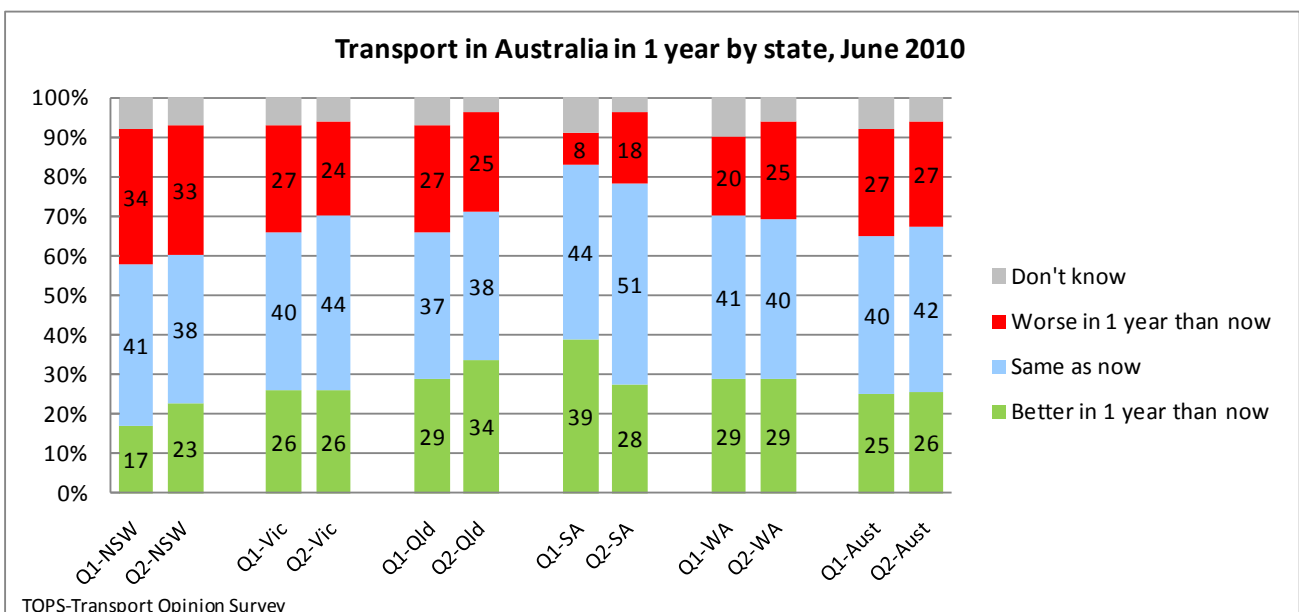
4. Confidence about transport improving in Australia

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 June 2010 quarter, there was little change from the previous quarter overall. A quarter of Australians (26%) think transport in Australia will be better in one year's time than now, while about the same (27%) think it will be worse.

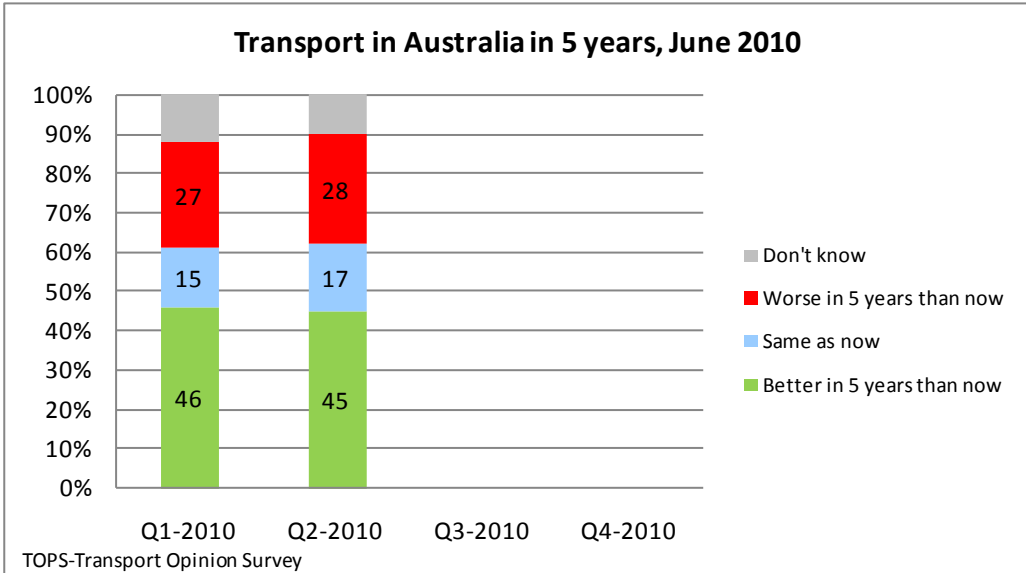


- However, there were changes by state. South Australian residents, who were clearly the most confident about transport in Australia improving in the last quarter, are now more cautious, with 18% thinking transport in Australia will be worse in one year, up from 8% last quarter. NSW residents, while still the least confident of any state, were more positive about transport in Australia improving in one year than last quarter (23%, up from 17%). Queensland residents were also more positive than last quarter (34%, up from 29%).

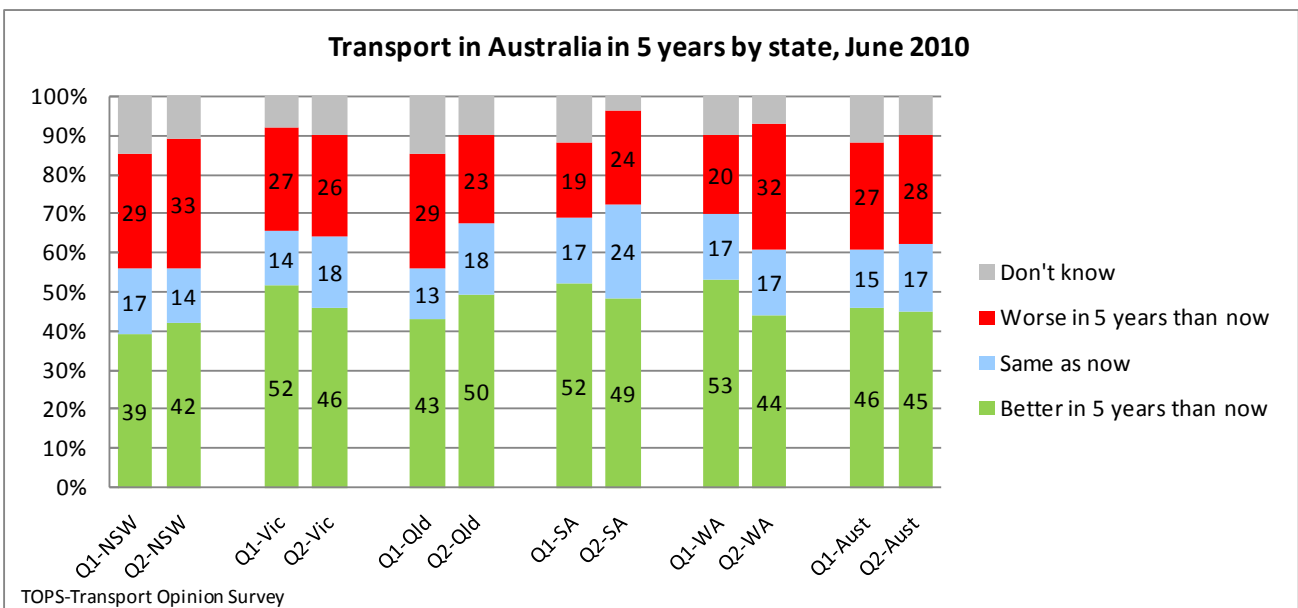


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- In the June 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 (45%) thinking transport in Australia will be better in five years. One in ten Australians were uncertain.



- But there were major changes in confidence about future transport in Australia by state. There was a major shift amongst WA residents, with 32% (up from 20% last quarter) thinking transport in Australia will be worse in five years. However Queensland residents became more confident, with 50% (up from 43%) thinking transport in Australia will be better. NSW residents, still the least confident of any state, were more positive than last quarter.



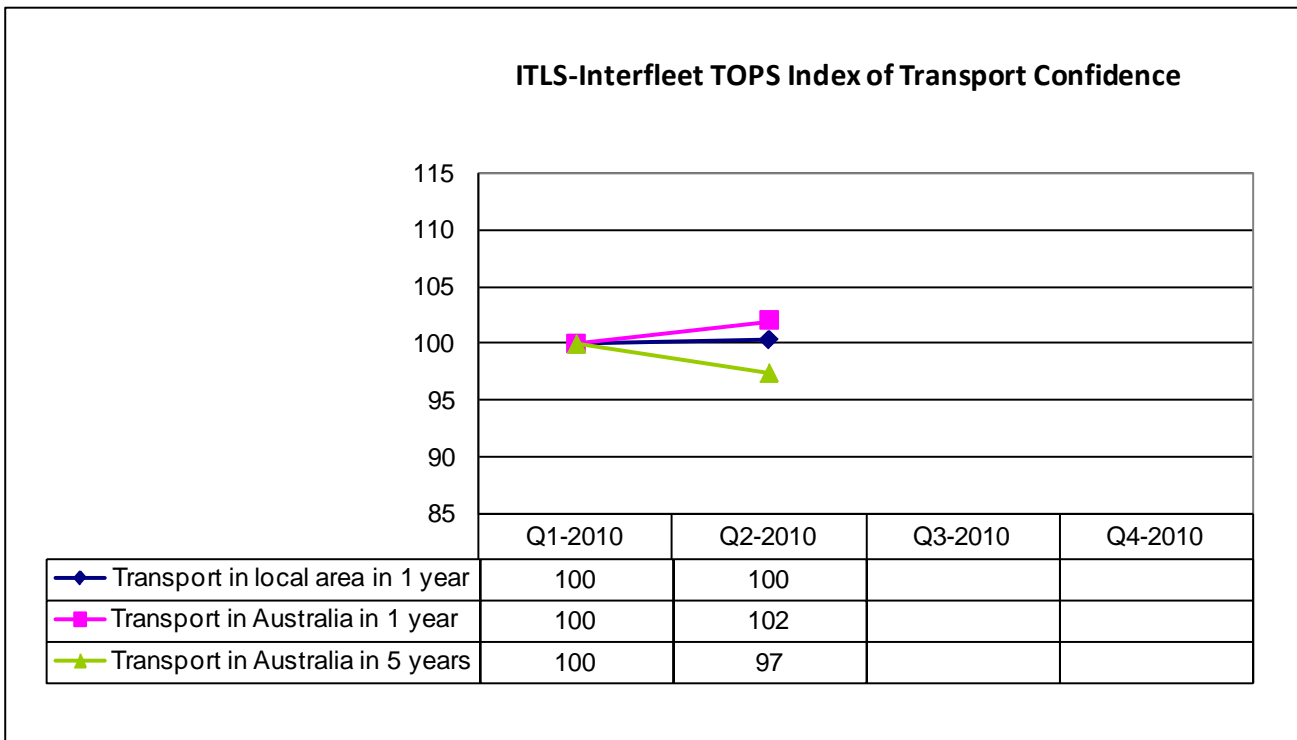
5. Change in confidence over time – TOPS Index

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, change 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 is 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 2010 quarter compared to the previous quarter:

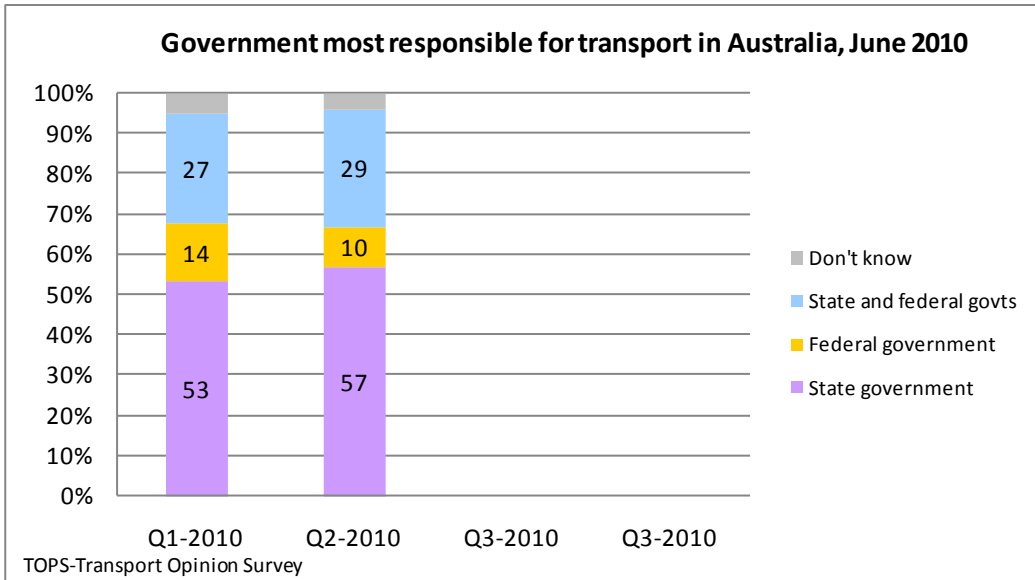
- There was no change in confidence about transport in the local area in one year's time
- Australians were slightly more confident about transport in Australia in one year's time
- Australians were slightly less confident about transport in Australia in five years' time.



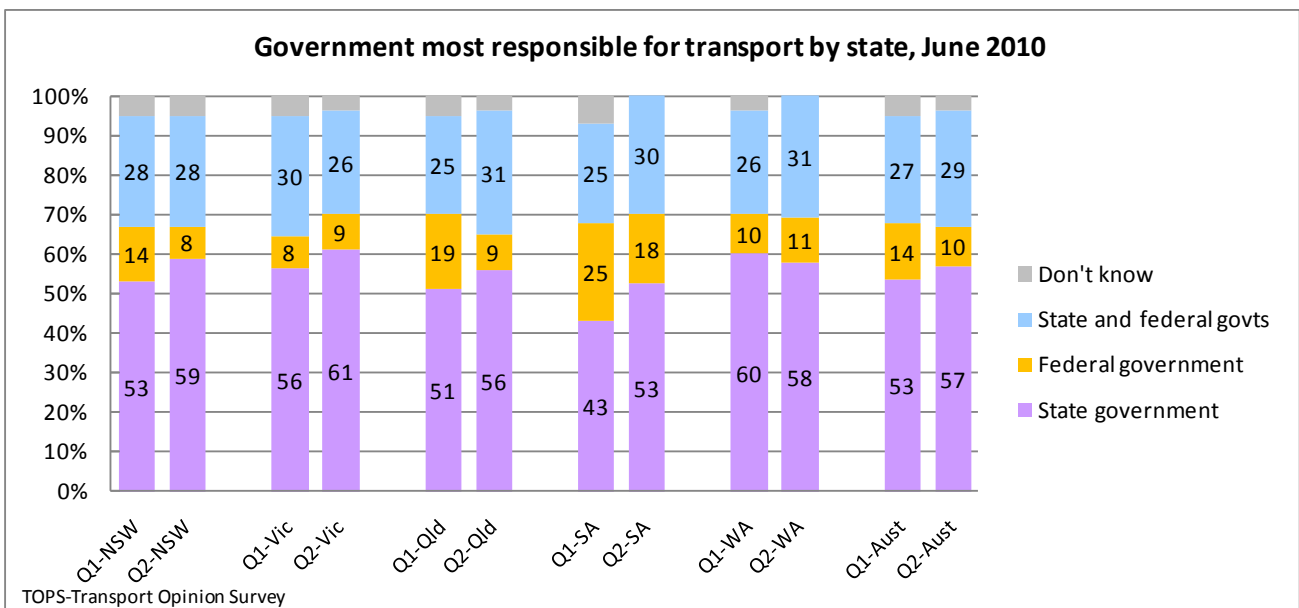
6. Government responsibility for transport

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

- In the June 2010 quarter, 57% of Australians think their state government is most responsible for transport, up from 53% last quarter. 29% nominated both their state and Australian federal governments and only 10% nominated the Australian federal government as most responsible.



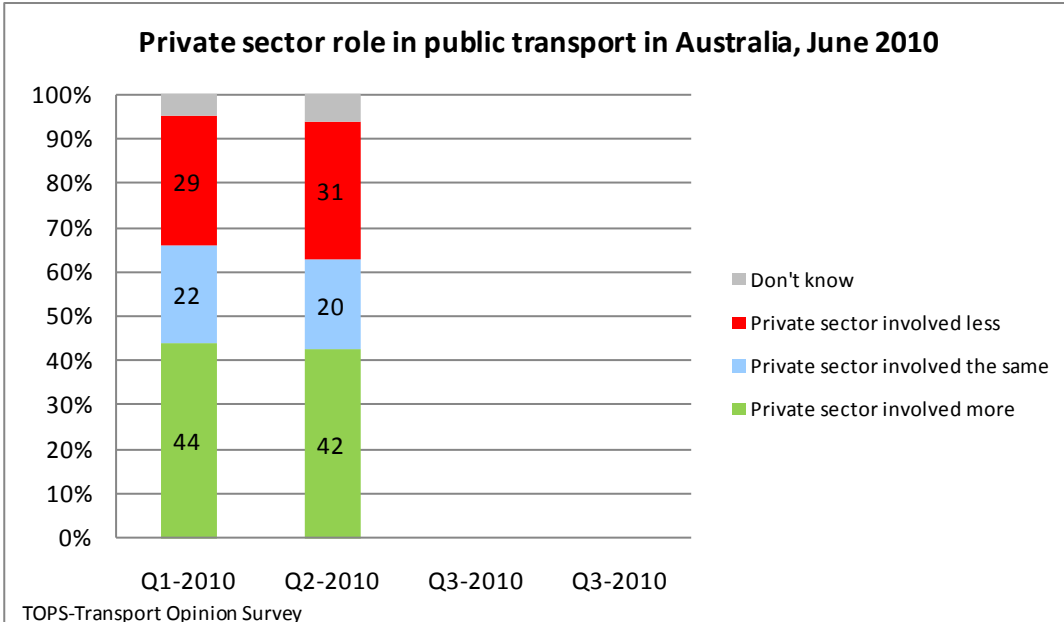
- Compared to last quarter, there was an increase in residents in most states saying their state government is most responsible for transport. Queensland, South Australia and Western Australia all had an increase of about 5% in residents nominating both their state government and the Federal government as most responsible for transport.



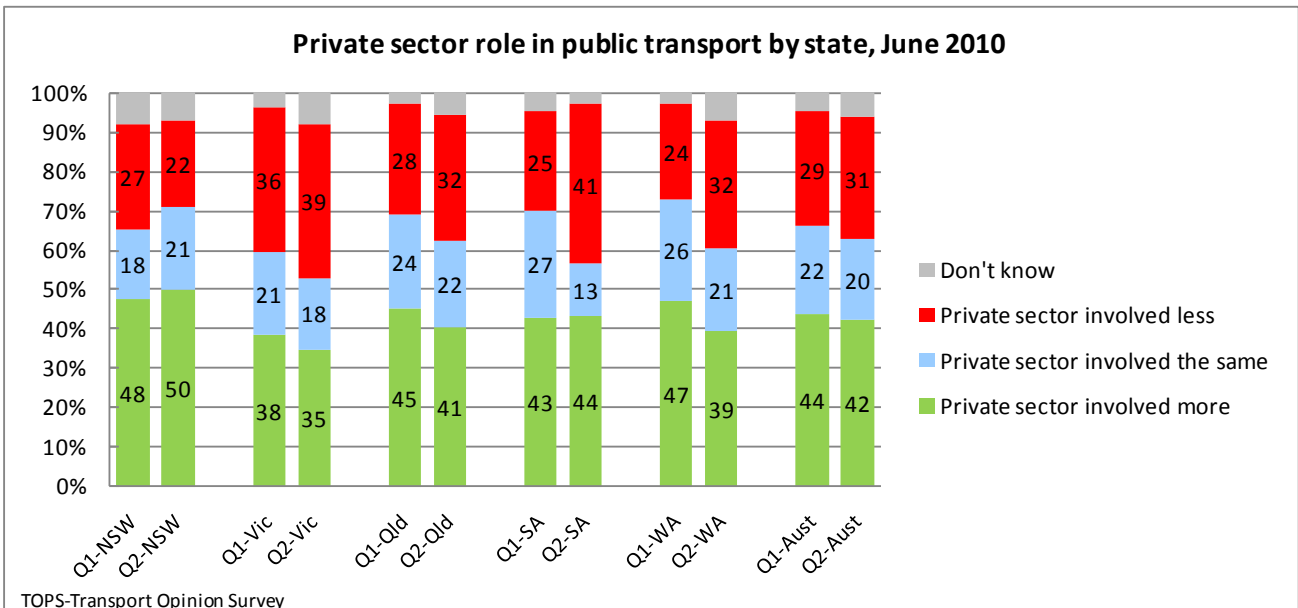
7. Private sector involvement in public transport provision

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 2010 quarter, 42% of Australians think the private sector should be involved more in the provision of public transport, while 31% think the private sector should be involved less.



- In the previous quarter, more residents in every state supported more private sector involvement in public transport rather than less involvement. In the June 2010 quarter, NSW continues to be the state most supportive of private sector involvement in public transport, while Victoria is the only state in which more residents want less private sector involvement in public transport rather than more.



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 Faculty of Economics and Business provides education and conducts research in transport, logistics and supply chain management.

Web <http://sydney.edu.au/business/itls>

Email business.itlsinfo@sydney.edu.au

Interfleet Technology is one of the world's leading rail consultancy groups providing strategic, operational, management and technical services to the international rail industry.

Web <http://www.interfleet.com.au>