



THE UNIVERSITY OF  
**SYDNEY**  
—  
Business School

# Transport Opinion Survey (TOPS)

September 2020

**Institute of Transport and Logistics Studies (ITLS)**

# Highlights

**Note: This survey was undertaken in early September during the second wave of Covid-19 outbreak after the major changes in working from home occurred**

## **Infrastructure and transport decrease as the highest priority national issue**

- In the September 2020, 9% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, down from 16% in September 2019. In the September 2020, 4% of Australians nominated transport as one of the two highest priority issues in Australia today, significantly down from 9% in September 2019.

## **Public transport the highest priority for transport**

- In the September 2020, 35% of Australians said that the highest priority issue for transport in Australia is public transport improvements, slightly up from 34% in September 2019. This is followed by other issues (29%) such as Covid-19, border lockdown and employment and road improvements (15%).

## **Transport not changed in local areas**

- In the September 2020, 62% of Australians said that transport in their local areas is the same now as one year ago, down from 54% in the September 2019.

## **Higher level of confidence about local transport in the short-term**

- In the September 2020, 18% of Australians said that transport in their local area will be better in one year's time, slightly up from 17% in the September 2019.

## **Higher level of confidence about transport in Australia in the short-term**

- In the September 2020, 20% of Australians think that transport in Australia will be better in one year's time, up from 17% in the September 2019.

## **Australians more confident about transport in Australia in the longer-term**

- In the September 2020, 39% of Australians think that transport in Australia will be better in five years, up from 33% in the September 2019.

## **ITLS Index of Transport Confidence**

- Compared to the launch of TOPS in March 2010, in September 2020 Australians are more confident about transport in their local area (Confidence index: up from 100 to 110), and gain confidence across Australia in one-year time (Confidence index: back to 100), and in five years (Confidence index: up from 100 to 104).

## **The percentage of Australians working from home increased nearly two times before and during Covid-19**

- 20% of Australians said they worked from home before Covid-19 while 37% of them revealed they teleworked during the pandemic.

## **Australians wish to work from home about 2 days per week**

- Average number of days per week Australian residents remotely work is 0.63 days while their ideal telework duration is 2.1 days per week.

## **About the Transport Opinion Survey**

The Transport Opinion Survey is a biannual survey (quarterly from 2011 backwards) 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 were conducted by telephone by Taverner Research using trained interviewers until the September 2013. The survey methodology was changed to an online survey from the March 2014, using an online panel.

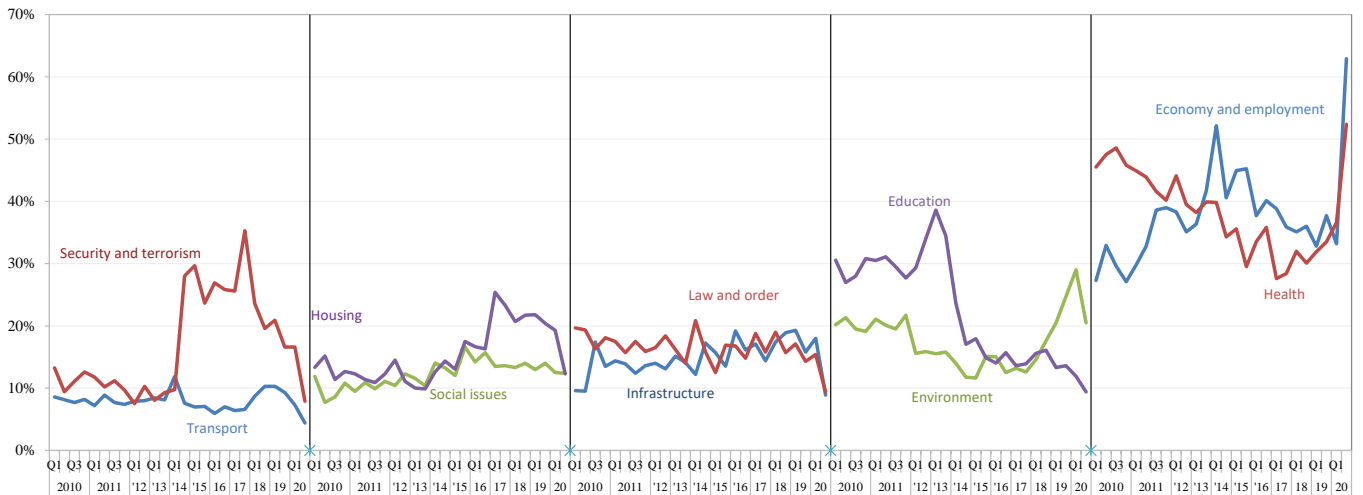
The September 2020 survey was conducted between 31 August – 3 September 2020. This report is based on the data from 994 completed responses. Current issues in this September 2020 survey included asking Australian respondents with various occupations how different their work from home routines are before and after Covid-19 and how many days they want to work from home in an ideal scenario.

## Transport as a national priority

Which two of these issues do you think are the highest priority in Australia today?

- In September 2020, the economy and employment increased as the highest priority issue in Australia, nominated by 63% of Australians, followed by healthy (52%). Australians were concerned and well informed about environment (21%), followed by housing and social issues (12%), which continued to be nominated among two top priority issues in Australia by many respondents in this September 2020.
- 9% of Australians nominated infrastructure and 4% nominated transport as one of the two highest priority issues in Australia today.

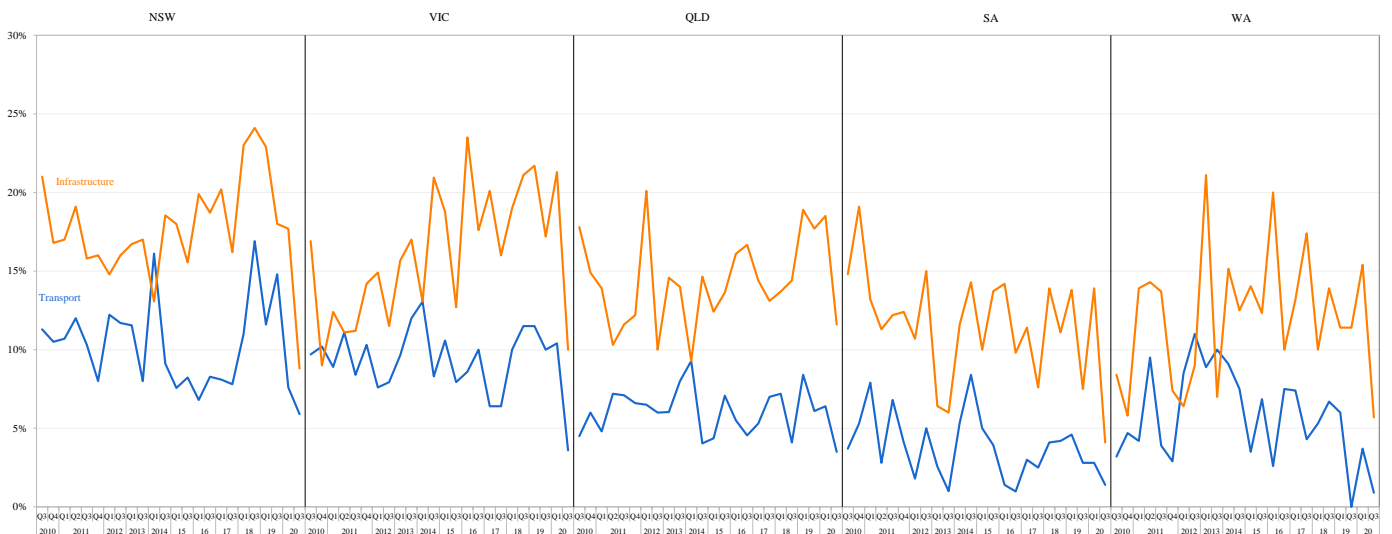
Issues selected as one of the top 2 priority issues in Australia, 2010 March - 2020 September



Note: percentages add up to 200% in each quarter as each respondent was asked to nominate two highest priority issues.

The priority of transport and infrastructure at the national level is regarded differently by residents in different states. In September 2020, 6% of New South Wales residents nominated transport as a priority as compared to 1% of South Australian or Western Australian residents. 12% of Queenslanders nominated infrastructure as one of priorities as compared to 4% of South Australian residents. There are significant decreases in percentage of residents of all states nominating transport and infrastructure as one of Australian priority compared to September 2019.

Transport and infrastructure as highest priority issues by state, 2010 March - 2020 September

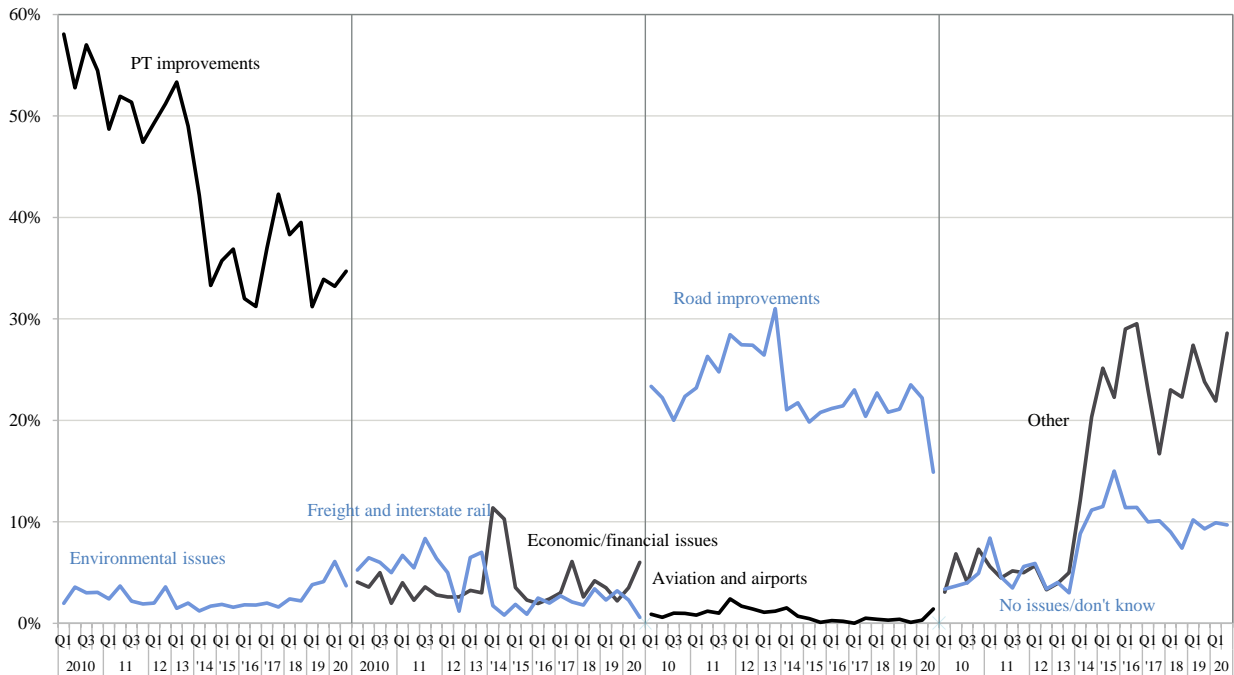


## Highest priority issue for transport

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

- In the September 2020, 35% of Australians said that the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue since the beginning of this survey in 2010. 29% of Australians nominated other issues, such as security and terrorism and safety issues associated with the transport system, as the second highest priority issues for transport in Australia, followed by road improvements (15%).

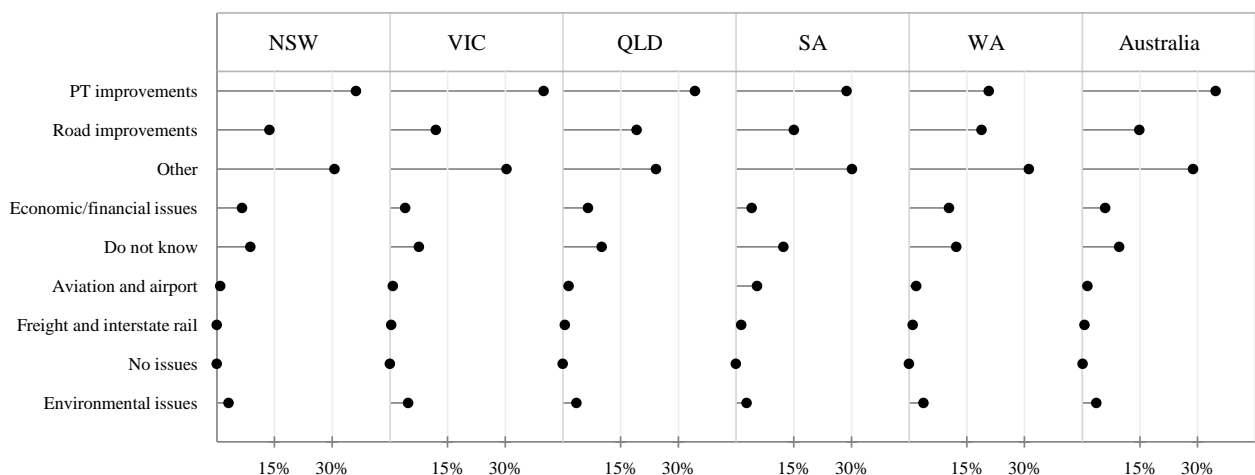
Highest priority transport issue in Australia, 2010 March - 2020 September



Note: percentages add up to 100% in each quarter. "Other" includes responses about transport in general, responses about both public transport and roads, issues not included in other categories such as terrorism, and rebuilding transport after disasters.

- In the September 2020, most of states (except South Australia and Western Australia) regarded public transport improvements as the highest priority issue in transport, followed by other issues and road improvements. The percentage of Victorian respondents regarding public transport improvements is the highest with 40%. South Australian and Western Australian respondents nominated other issues as the second highest priority with 30% and 31% respectively, followed by public transport improvements and road improvements.

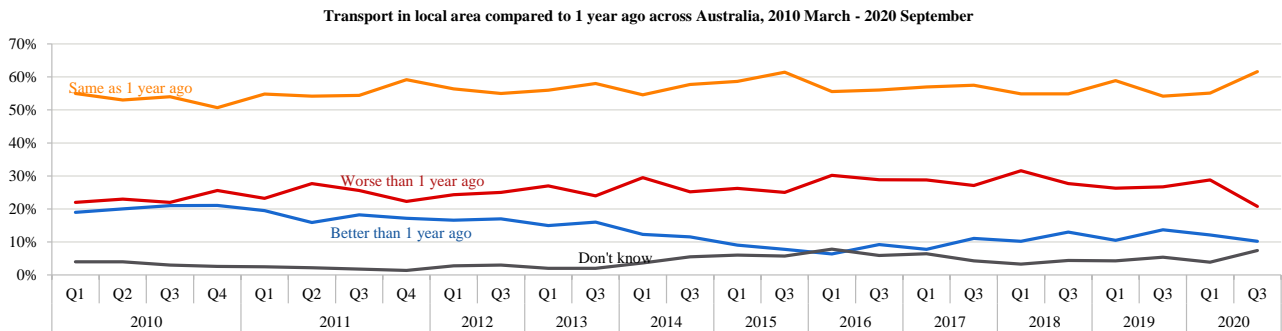
Highest priority transport issue by state, 2020 September



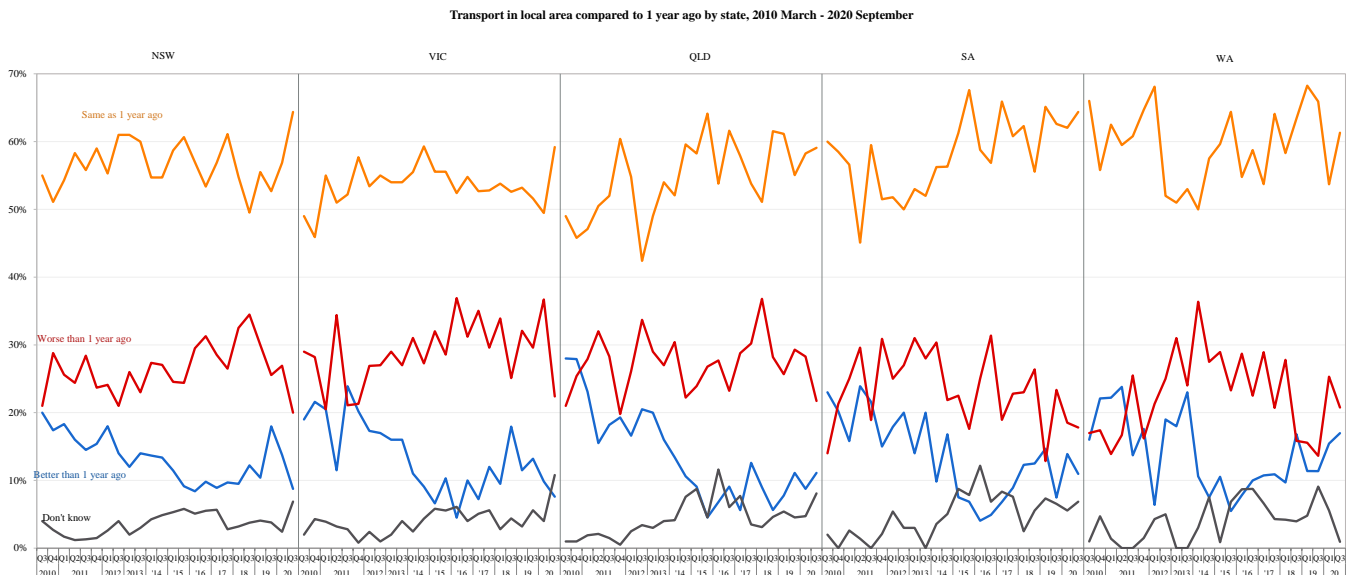
## Local transport does not change

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 September 2020, only 10% of Australians believed that transport in their local areas is better now than one year ago, while 62% of Australians said it is the same as one year ago, and 21% of Australian said it is worse now than one year ago.



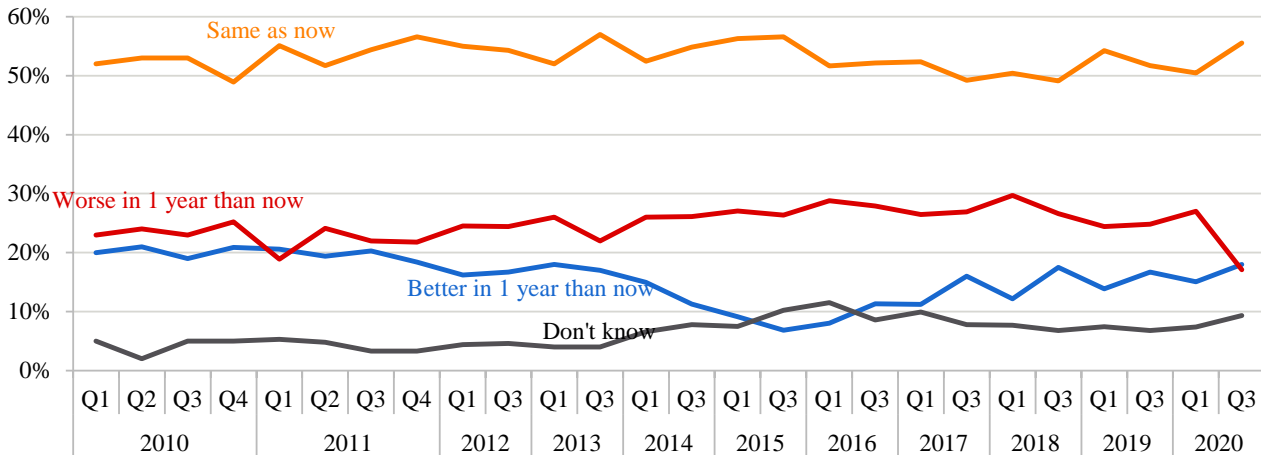
- The evaluation of transport in the local area by respondents is relatively consistent across all states of Australia, with most respondents identifying it as the same as one year ago and these figures increase as compared with those in previous years. Compared with the last quarter, there is a decrease in most of states in the percentage of residents responding that transport in their local area is better now than one year ago, except Queensland and Western Australia increasing for this category. The proportion of residents thinking that transport becomes worse in their local area also decreases in all states.



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?

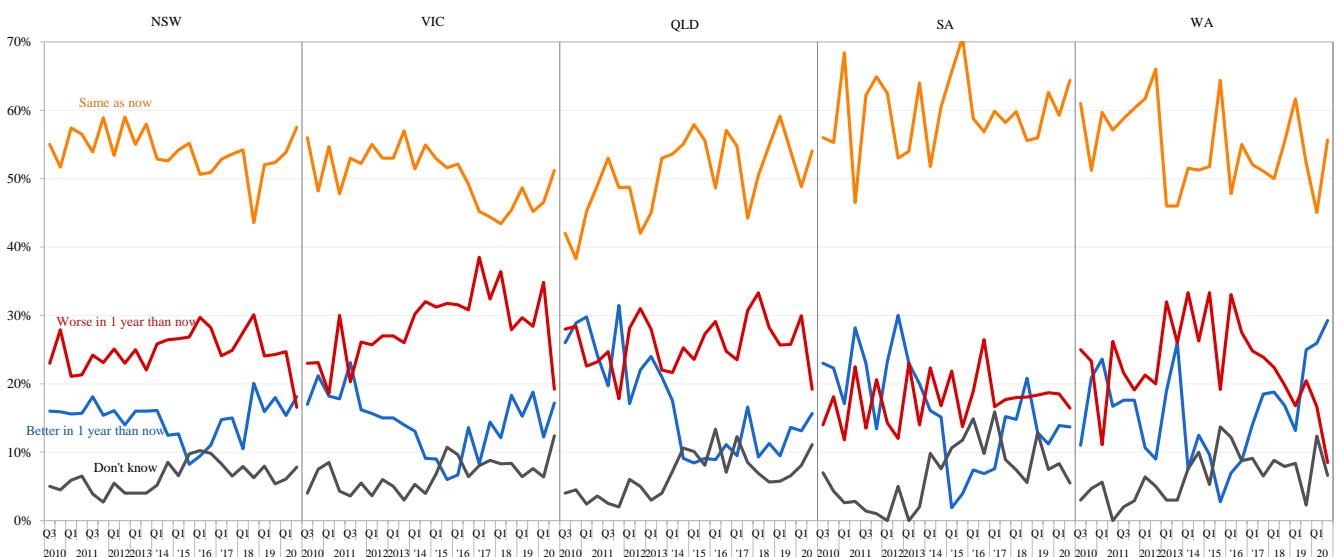
- In the September 2020, 56% of Australians said that transport in their local area will be the same in one year's time. 18% said transport will be better, slightly up from 17% in the September 2019 while 17% said transport will be worse, significantly down from 25% in the September 2019.

Transport in local area in 1 year time across Australia, 2010 March - 2020 September



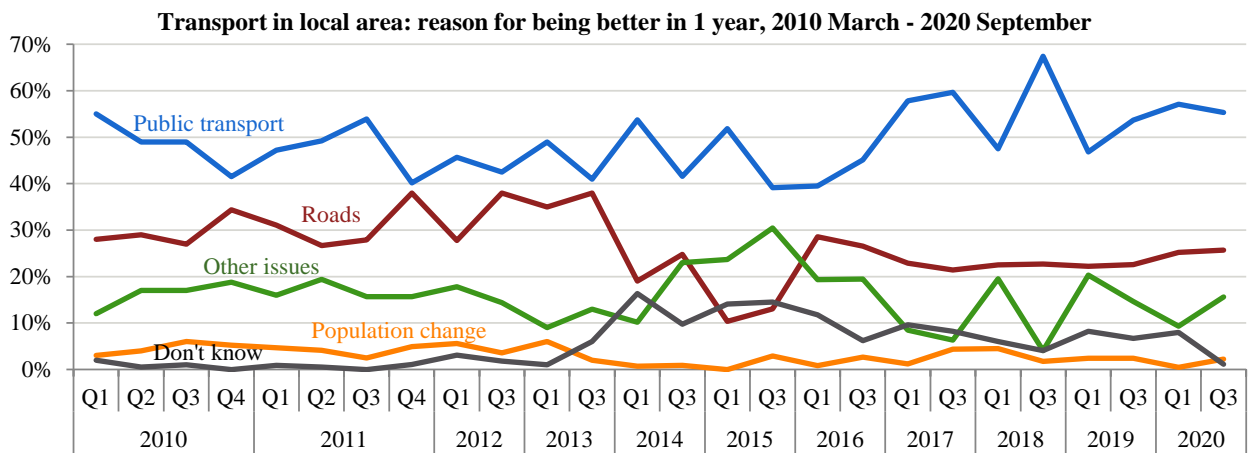
- 29% of Western Australian residents believed that transport in their local area will be better in one year's time; while 19% of either Victorian or Queensland residents believed that transport in their local area will be worse in one year's time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 March - 2020 September

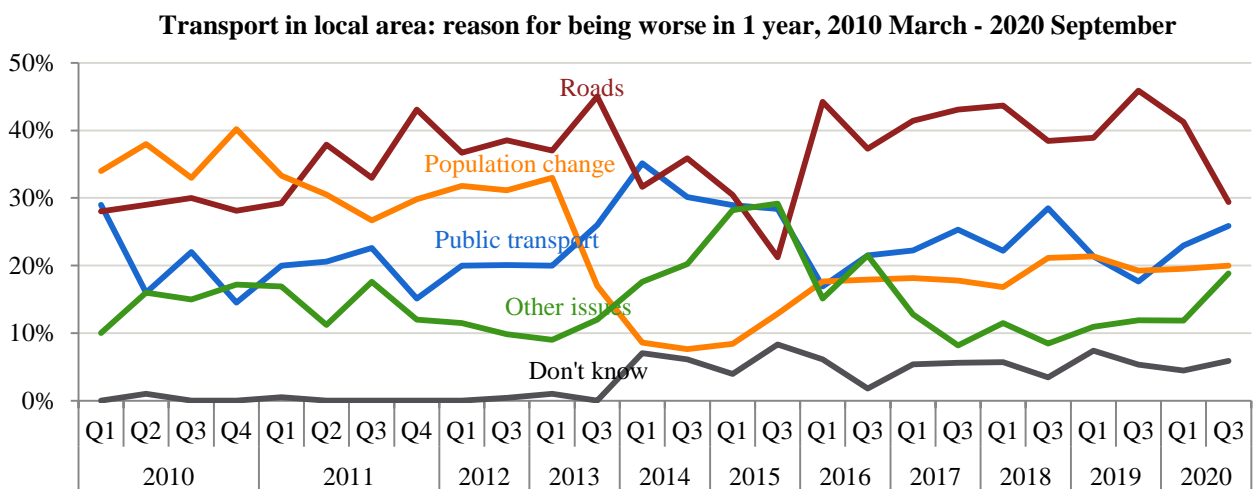


What were you thinking of most when answering that question [about transport in your local area in 1 years time?]

- Public transport services are the main reasons for residents to believe that their local transport will be better (top figure) in one year, while roads are the main reasons for residents to believe that their local transport will be worse (bottom figure) in one year. Public transport slightly decreased as the main reason for Australians to believe the transport becomes better in their local while roads significantly decreased as the remarkable reason to think their local transport gets worse, as compared to last year. In addition to public transport and roads, other issues increased compared to the March 2020 and remains as the third main reasons for residents to believe that their local transport will be better in one year while population change remains the same as the third main reason to believe that their local transport will be worse in one year as compared to the March 2020. The other issues, including economic and financial issues, government role in transport, and environmental issues, remarkably increased as the fourth reasons for local transport being worse.



Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.



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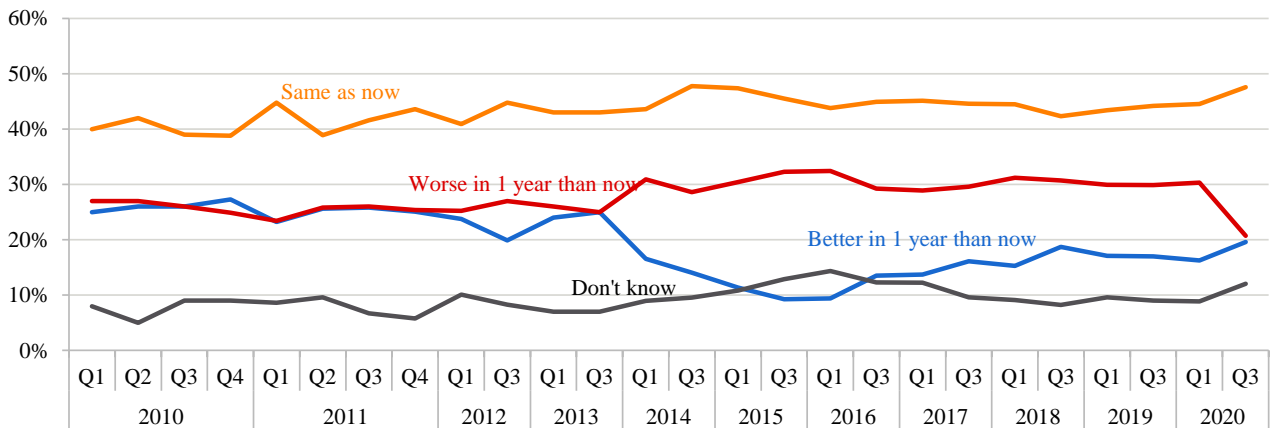


## Confidence about transport is growing in Australia

Do you think that in 1 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?

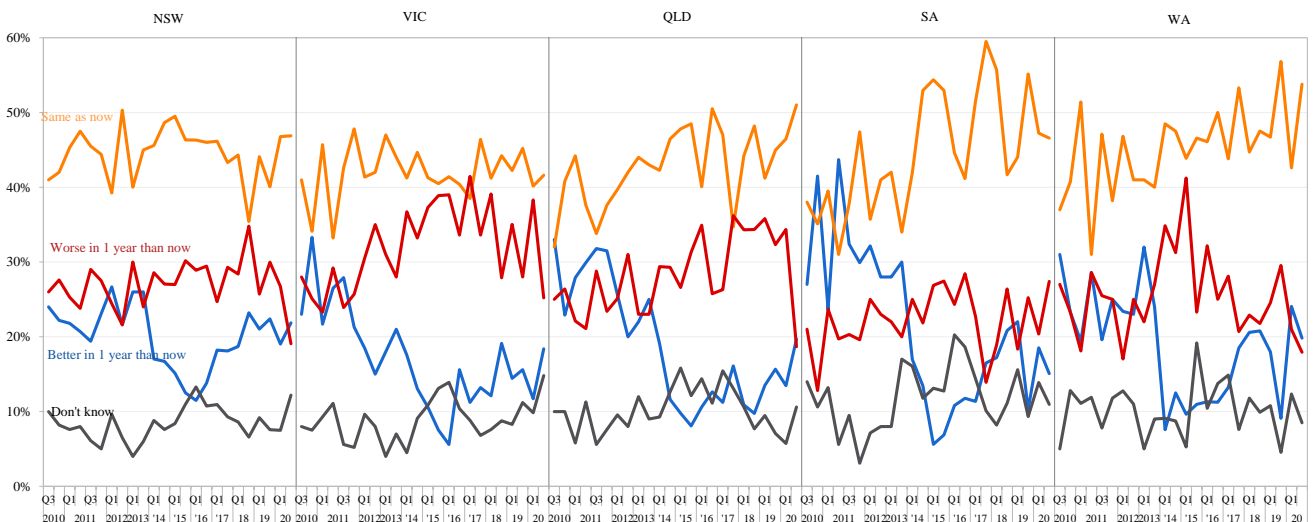
- In the September 2020, 48% of Australians said that transport in Australia in one year will be the same as now, with 20% of Australians saying that transport in Australia will be better in one year's time, up from 17% in September 2019.

Transport in Australia in 1 year, 2010 March 2020 September



- In the September 2020, about 27% of South Australian residents and 25% of Victorian residents said that transport in Australia will be worse in one year, and 15% and 18% of these two states respectively said that it will be better. New South Wales residents are relatively more confident about transport in Australia in one year's time, as compared to other states, with 22% of their residents believing that transport in Australia will be better in one year's time and 19% of the residents thinking that Australian transport will be worse in one year's time.

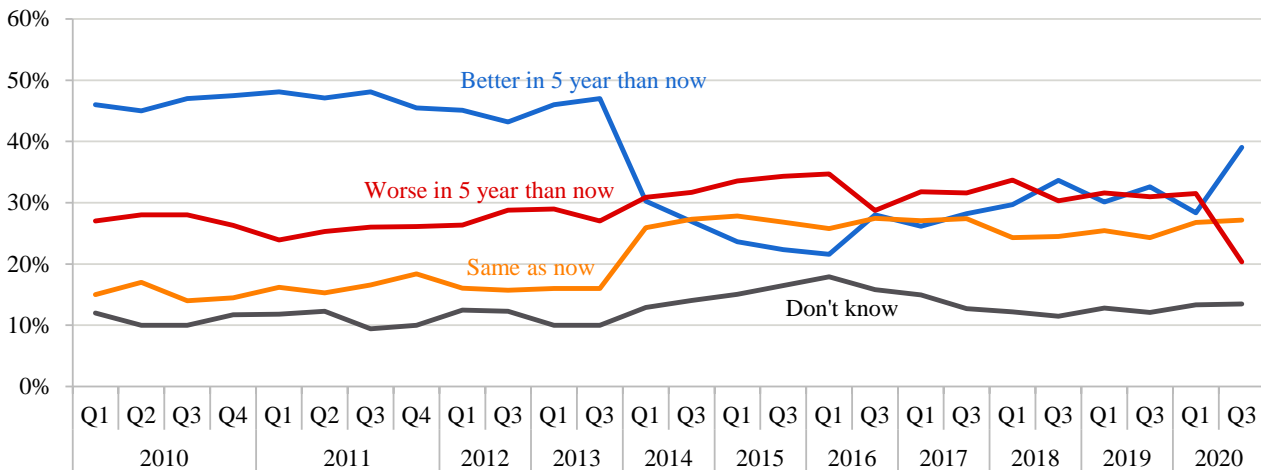
Transport in Australia in 1 year time by state, 2010 March - 2020 September



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?

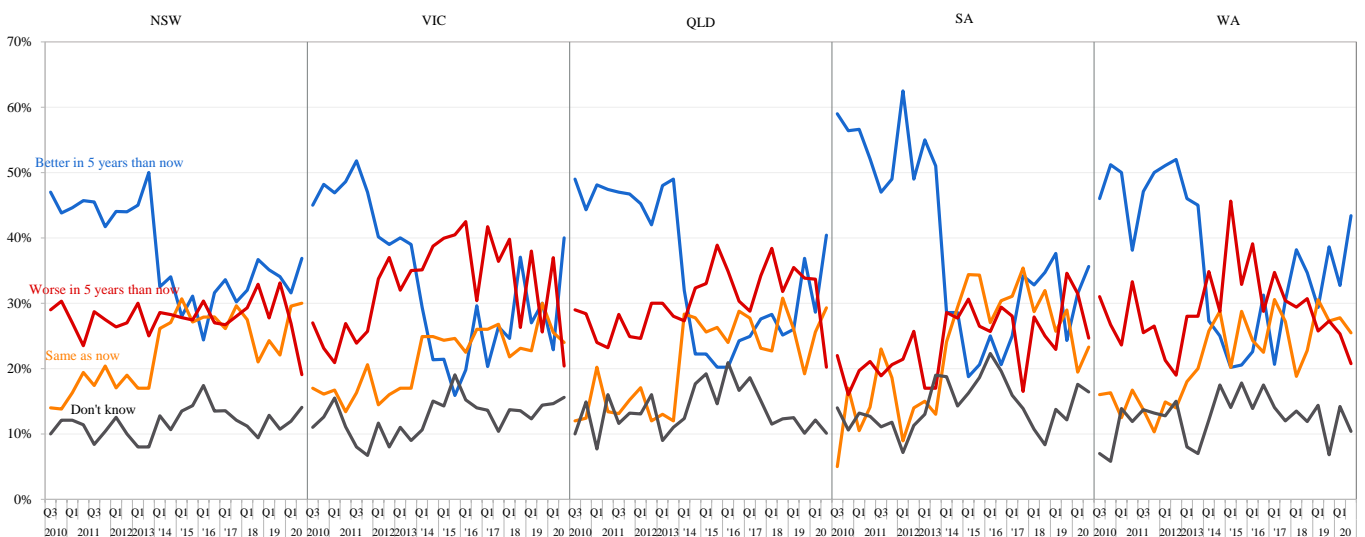
- Australians are significantly gaining confidence that transport will be better in five years than it is now. In the September 2020, 39% of Australian residents believed transport in Australia will be better in five years, up from 33% in September 2019. People believing that transport in Australia getting worse in five years' time significantly decreased compared to the September 2019.

Transport in Australia in 5 years, 2010 March - 2020 September



- In the September 2020, the proportions of Australian residents believing that transport in Australia will be better in five-year time increased in all states compared to September 2019. Moreover, these figures are remarkably higher than the percentages of Australian thinking Australian transport will be worse in five-year period, which are decreased compared to September 2019.

Transport in Australia in 5 years by state, 2010 March - 2020 September



## Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey about transport getting better or worse are used to set an index of 100 in quarter 1, March 2010. In 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.

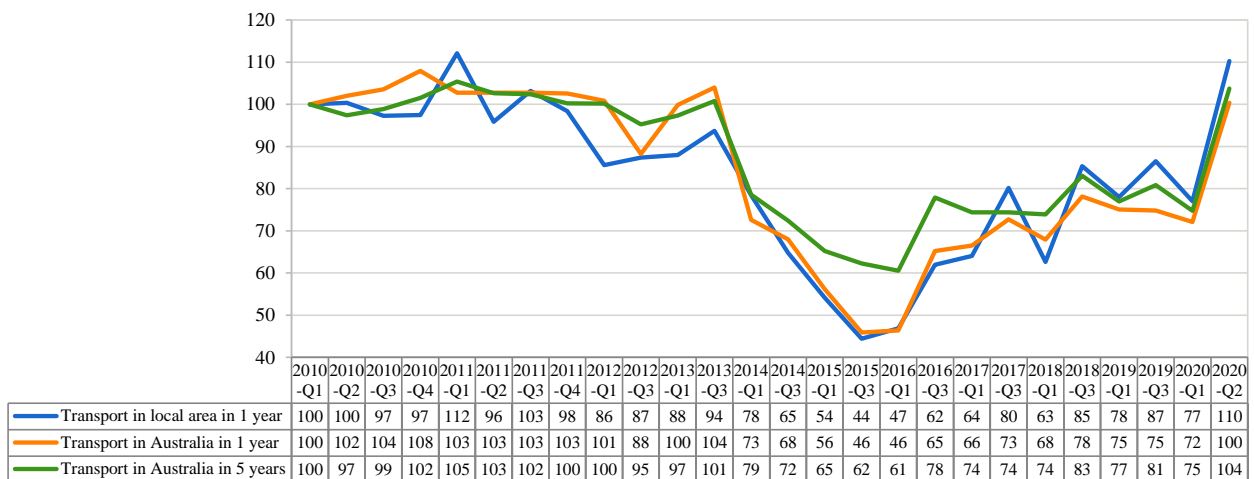
A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2020 quarter as compared to the September 2019:

- Australians have become remarkably more confident about transport in their local area in one year's time.
- Australians have become much more confident about transport in Australia in one year's time.
- Australians have gained confidence about transport in Australia in five years' time.

Compared to the launch of TOPS in March 2010, Australians are more confident about transport in their local area in March 2020 (Confidence index: from 100 to 110), gained confidence about transport in Australia in the next year (Confidence index: back to 100), and more confident about transport in Australia in five-year time (Confidence index: from 100 to 104). There has been a very strong decline in confidence since September 2013; however, all three indices have significantly recovered compared to the year 2010.

ITLS TOPS Index of Transport Confidence



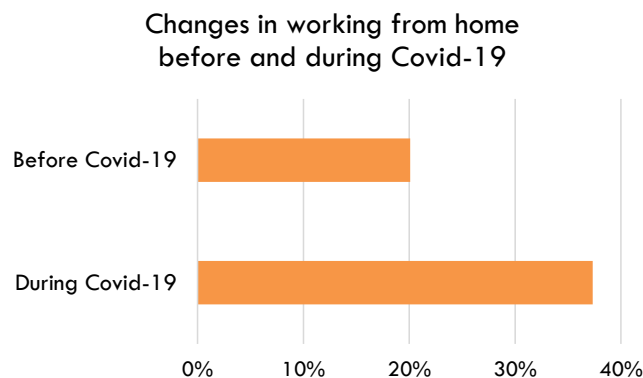
## Supplementary questions in the September 2020

Australians by their occupation were asked about how regular they worked from home before Covid-19 and whether they remotely work more than usual during Covid-19. The Australians responding that they work from home more often than before were also asked how likely their employer support them to work remotely 1 or 2 days a week if they wanted to do so. In addition, how many days per week the Australian respondents want to work from home in an ideal scenario.

- **If you are/were working at present, which occupation describes your job best (if retired or home-maker complete below)?**
- **Did you regularly work from home before COVID19? If yes, how many days per week?**
- **During Covid 19, did you work from home more than usual?**
- **If yes, do you think that your employer now is more likely to support this if you wanted to work at home 1 or 2 days a week?**
- **Ideally, how many days per week would you like to work from home?**

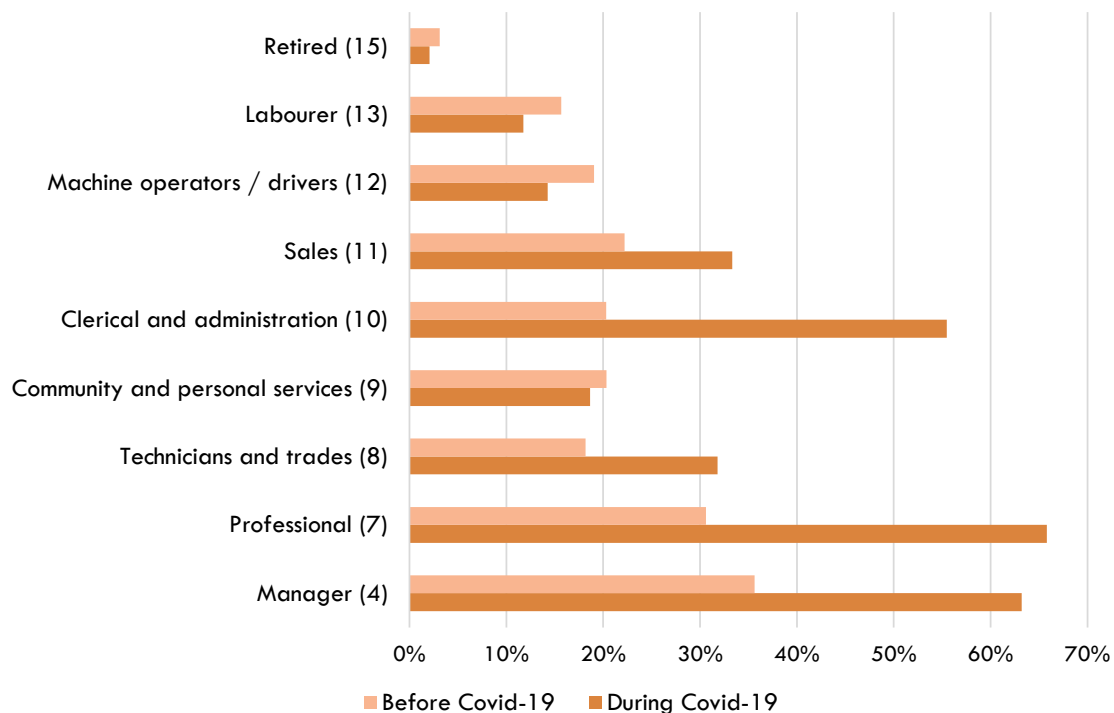
### Working from home before and during Covid-19

On average, the percentage of Australian respondents working from home during Covid-19 doubled that before Covid-19 with 37% compared to 20%.



- The proportion of the clerical and administration group working from home increased nearly three times during Covid-19 compared to that percentage before Covid-19, with 56% as opposed to 20%.
- 66% of the professionals and 63% of the managers remotely worked after Covid-19 has happened, whereas these percentages are 31% and 36% before the pandemic respectively.
- Covid-19 also increased the proportion of working from home of the technical and trading staff and the sale force with 18% and 22% before Covid-19 compared to 32% and 33% during the pandemic lockdown respectively.
- On the contrary, the pandemic Covid-19 required the other groups including community and personal service workers, machine operators / drivers, labourers and retired workers to work at workplaces more than before Covid-19. 16% of labourers and 19% machine operators / drivers remotely worked on regular basic while these proportions decreased to respectively 12% and 14% during Covid-19.

## Changes in working from home before vs. during Covid-19 by occupation



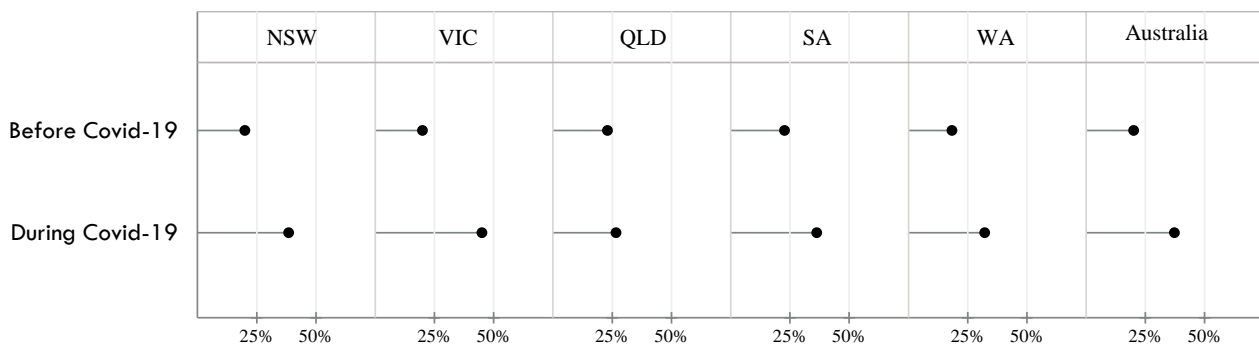
**Notes:**

- (4) Manager Chief Executives, General Managers, Farm Managers, Specialist Managers, Hospitality, Retail and Service Managers
- (7) Arts and Media, Design, Engineering, Science, Education, Health, ICT, Legal and Social
- (8) Engineering, ICT, Science, Automotive, Food, Animal, Horticultural Workers
- (9) Health and Welfare Support, Carers, Hospitality Workers, Protective Services, Sports
- (10) Office Managers, Personal Assistants, General Clerical, Numerical Clerks, Office Support
- (11) Sales Representatives and Agents, Sales Assistants and Salespersons, Sales Support
- (12) Machine and Stationary Plant Operators, Mobile Plant Operators, Road and Rail Drivers, Storepersons
- (13) Cleaners, Laundry Workers, Construction and Mining, Factory, Farm and Forestry

## Working from home before and during Covid-19 by state

- Victoria state has witnessed the biggest change in the percentage of working from home after Covid-19. 45% of Victorian residents worked from home after the pandemic has happened with while this figure was 20% before the pandemic.
- New South Wales residents working from home has increased nearly two times during Covid-19 compared to that before Covid-19 with 39% compared to 20%.
- South Australian and Western Australian residents also worked from home much more after the pandemic.
- Queenslanders appeared not to change much the way they work during Covid-19 compared to before the pandemic with 23% of Queensland residents working from home regularly and 27% of them remotely work during Covid-19.

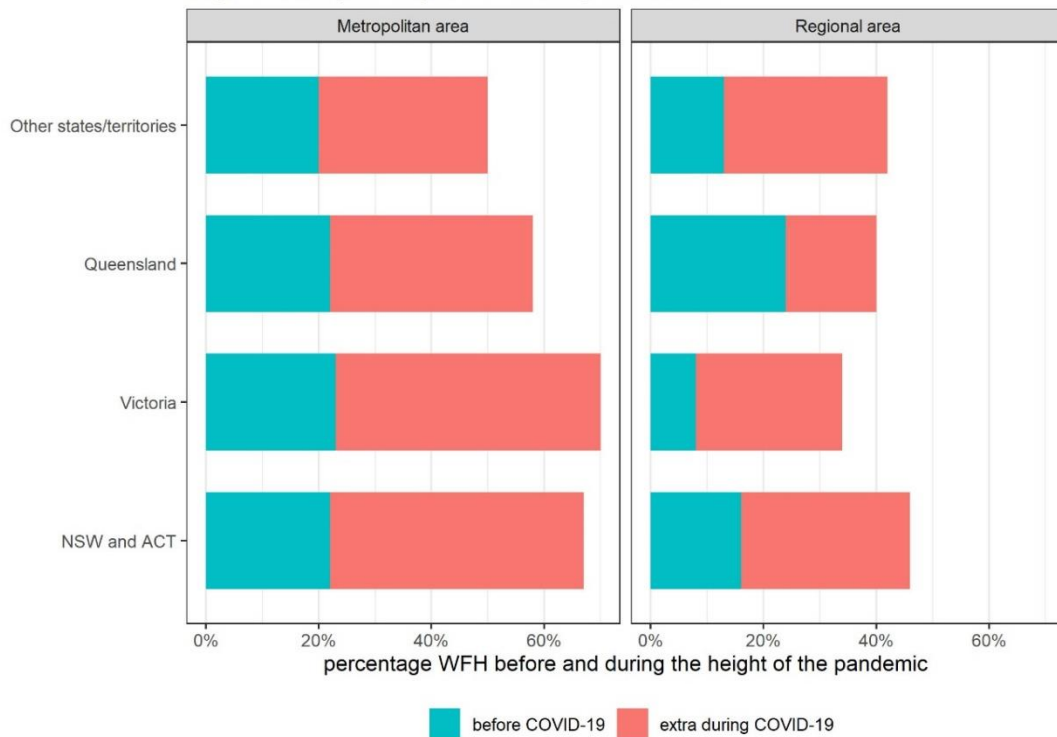
Changes in working from home before vs. during Covid-19 by state



The difference in the regular telework before Covid-19 and during Covid-19 between capital cities and regional areas varies across states. It is noticeable that Australians started to work flexibly more during the pandemic. Interestingly, there is only an exception that residents in the regional Queensland worked from home during Covid-19 less than they had done so before Covid-19.

- The work arrangement in Sydney seems to be influenced by Covid-19 more than that in NSW regional areas. Sydney residents' telework increased from 21% before Covid-19 up to 47% during Covid-19, whereas, NSW regional residents' remote-work rate grew from 16% before to 30% during the pandemic.
- By contrast with the NSW context, the regional Victorians have changed in their telecommuting more significantly than that of Melbourne citizens. 8% of people in the Victorian regional areas worked from home before the pandemic while 27% of them remotely work during Covid-19. Meanwhile, in Melbourne metropolitan area, 23% of the residents said they work from home before while 49% of them revealed their teleworking arrangement during the pandemic.
- The tendency of telework of residents in other capital cities such as Adelaide, Perth, Hobart and Darwin are similar to that of Victoria state where people in the regional areas tend to work from home during the pandemic more than the citizens in their capital cities.

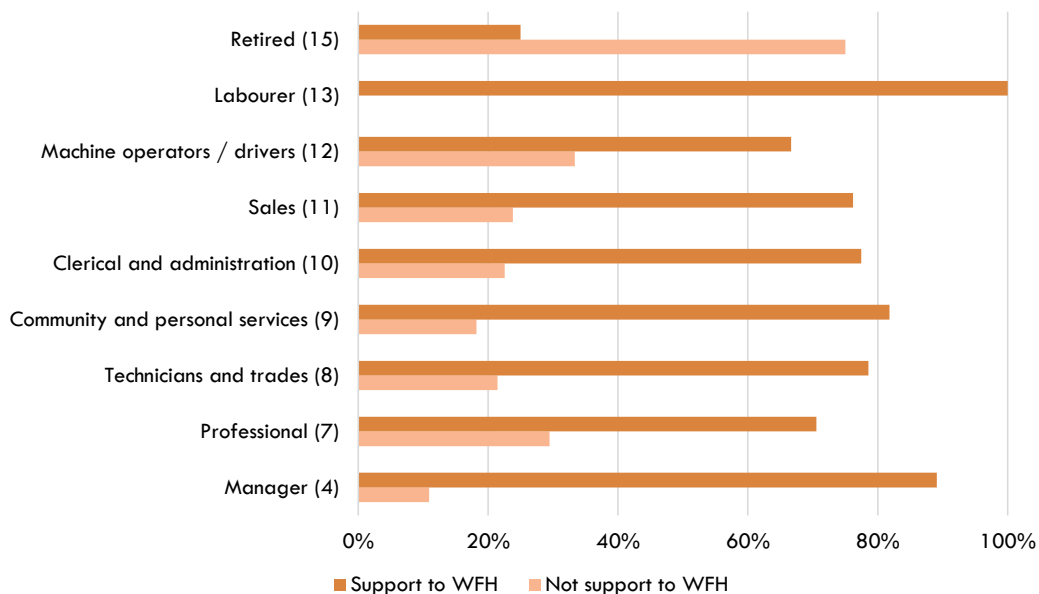
Working from home (WFH) before and during the height of COVID-19 by state segmented by metropolitan and regional areas



**For those who said yes to work from home during Covid-19, do you think that your employer now is more likely to support this if you wanted to work at home 1 or 2 days a week?**

Most of Australians who have remotely worked during the pandemic believed that their employers would agree for them to work from home 1 or 2 days a week. Labourers fully believed in this support, followed by the manager group with 89% of respondents think their employers would allow them to telework 1 or 2 days in a week. On the contrary, two thirds of the machine operators / drivers believed in their employers' support for their telecommuting.

Do you think that your employer now is more likely to support this if you wanted to work at home 1 or 2 days a week? by occupation

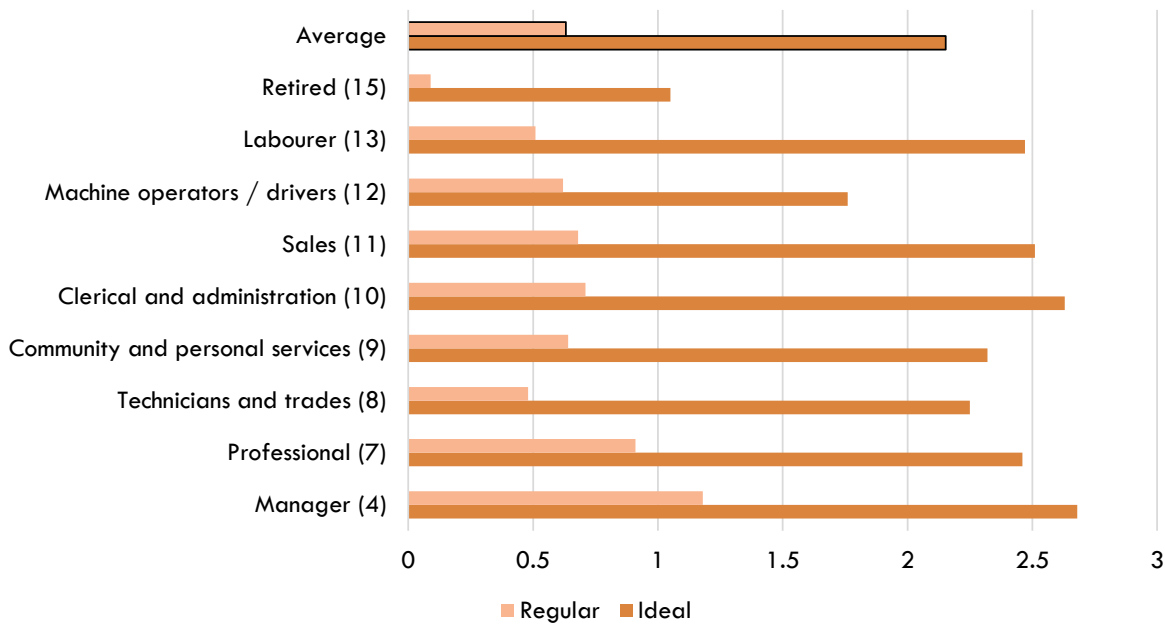


### Number of days working from home on a regular basis vs. an ideal scenario

On average, Australians work from home 0.63 days per week on a regular basis while wish to increase this number of days working remotely up to 2.15 days.

- The manager occupation group has the longest time working from home with 1.18 days per week, followed by the professional group with 0.91 days.
- Technician/traders and labourers are among the working groups who has the shortest work-from-home time with 0.48 and 0.51 days per week, respectively.

Days working from home regularly vs. ideally by occupation





## Timing of TOPS

The fieldwork 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
- March 2012: 10 – 26 February 2012
- September 2012: 10 – 27 August 2012
- March 2013: 23 March – 13 April
- September 2013: 10 – 26 August
- March 2014: 13 – 18 February 2014
- September 2014: 16 – 19 September 2014
- March 2015: 4 – 9 March 2015
- September 2015: 9 – 14 September 2015
- March 2016: 2 – 14 March 2016
- September 2016: 1 – 7 September 2016
- March 2017: 2 – 13 March 2017
- September 2017: 7 – 8 September 2017
- March 2018: 26 February – 6 March 2018
- September 2018: 30 August – 1 September 2018
- March 2019: 21 February – 5 March 2019
- September 2019: 6-9 September 2019
- March 2020: 26 February – 4 March 2020
- September 2020: 31 August – 3 September 2020

## More information

Visit the TOPS website for quarterly reports, media coverage and to register to receive TOPS updates by email twice a year.

<https://sydney.edu.au/business/our-research/institute-of-transport-and-logistics-studies/transport-opinion-survey.html>

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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