

THE UNIVERSITY OF  
**SYDNEY**  
—  
Business School

# Transport Opinion Survey (TOPS)

September 2022

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

# Highlights

**Note:** This survey was conducted from September 1<sup>st</sup> to September 7<sup>th</sup>, 2022. All states and territories continue to recover from the pandemic. The public is under the impact of high inflation, high interest rates and high cost of living. The infrastructure damage caused by the flood earlier in 2022 has yet to be fully fixed. People in NSW have been experiencing massive delays and cancellations of train and bus services due to the ongoing industrial disputes between the state government and the union. Air fares have also sky rocketed since mid-2022. The positive news is that despite soaring petrol prices, cost of living and other negative economic impacts, people's confidence in the future of transport improvements has increased significantly compared to the March 2022 survey.

## Health and economy/employment are the two highest priority national issues

- In September 2022, 47% of Australians nominated health and 43% selected economy and employment as one of Australia's two highest priority issues today.

## Public transport improvements and economic and financial issues increased rapidly as the top priorities for transport

- In September 2022, 29% of Australians said that the highest priority issue for transport in Australia is public transport improvements, up from 25% in March 2022. Economic and financial problems have increased to 19% from 16% in March 2022 due to higher living and energy costs.

## Opinions on transport in local areas become more bipolar

- In September 2022, 30% of Australians said that transport in their local areas was worse than one year ago, up from 26% in March 2022. In contrast, 10% of Australians said that transport in local areas is better than one year ago, up from 7% in March 2022. People with neutral or no opinions have decreased from 67% in March 2022 to 61% in September 2022.

## A higher level of confidence about local transport in the short-term

- In September 2022, 18% of Australians said that transport in their local area would be better in one year's time, up from 14% in March 2022.

## Australians have more confidence about transport in Australia in the short-term

- In September 2022, 19% of Australians thought that transport in Australia would be better in one year, up from 15% in March 2022.

## Australians have more confidence about transport in Australia in the longer-term

- In September 2022, 36% of Australians thought that transport in Australia would be better in five years, up from 31% in March 2022.

## ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010; in March 2022, Australians are less confident about transport in their local area (Confidence index: down from 100 to 94), have less confidence across Australia in one year's time (Confidence index: down from 100 to 91), and have less confidence in five years' time (Confidence index: down from 100 to 96). However, all indexes have increased significantly compared to March 2022.

## Over 76% of Australians ordered online in the last four weeks

- Over 76% of Australians made online order(s) in the previous four weeks, an increase of 3% from March 2022. Online shoppers spent \$375 on average, with 47% on groceries, clothing & apparel. Across product categories, 55% to 77% of online spending is delivered to home or other places.

## Working people spend 26% of their work time working from home (WFH)

- Of the 63% of respondents who have undertaken paid work in the last two weeks, they worked on average 8.09 days. 26% of all working hours are WFH hours, decreased from 43% from March 2022. Working people in NSW and VIC spent about 30% of working hours WFH, the highest among all states. Professionals, managers, and clerical/admin workers work from home more than other workers.

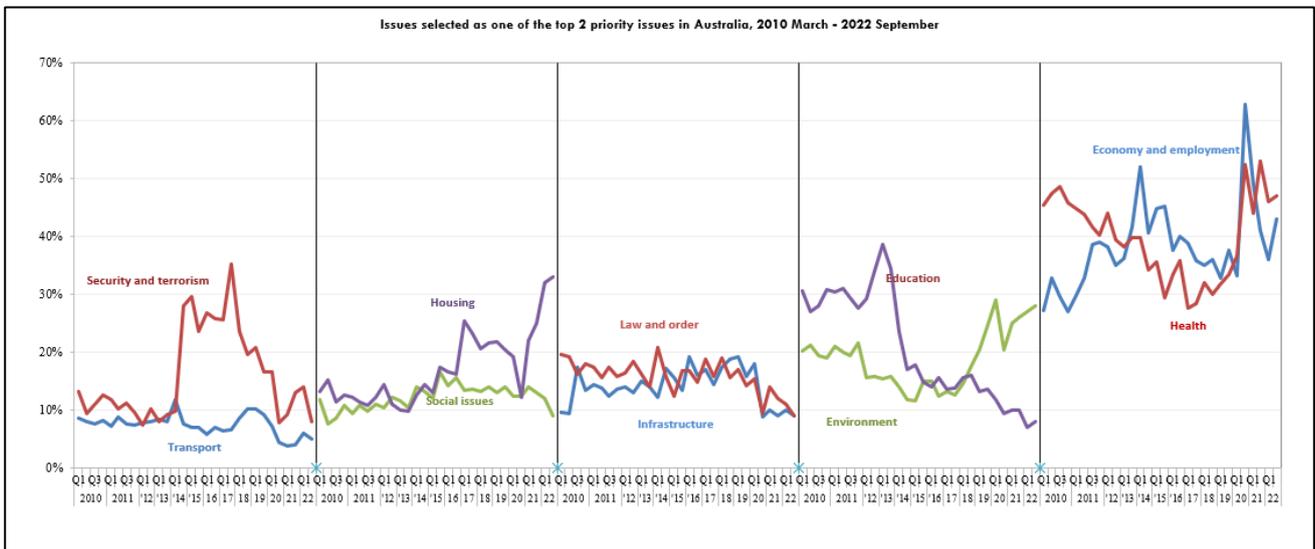
## About the Transport Opinion Survey

The Transport Opinion Survey is a biannual survey (quarterly from 2010) 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. The survey methodology was changed to an online survey in March 2014, using an online panel. The September 2022 survey was conducted between the 1<sup>st</sup> and 7<sup>th</sup> of September 2022. This report is based on the data from 1,027 completed responses.

### Transport as a national priority

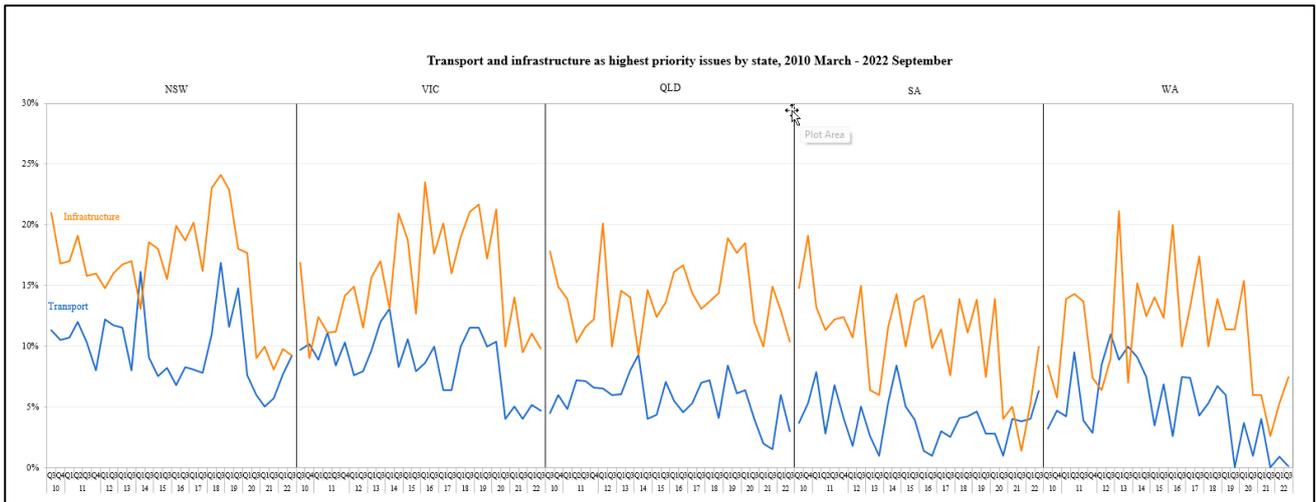
Which two of these issues do you think are the highest priority in Australia today?

- From May 2022, RBA increased the official interest rate by 0.5% for five consecutive months to offset the high inflation. Public views of the soaring cost of living from food, energy, fuel and other items is clearly demonstrated in people's opinions on national priority. The priority that increased most from the March 2022 survey is economy and employment, up from 36% to 43% nominated by Australians. In contrast, the priority that decreased most from March 2022 survey is security and terrorism, down from 14% to 8%. Other priorities such as transport, social issues, housing infrastructure and the environment have remained at their previous levels.
- Health remains the top priority at 47% but remained at a similar level to March 2022 at 46%. Australians have adopted the "living with the Covid" approach for nearly a year and are less nervous about the current variants. As more Australians have experienced Omicron, the caution is reducing with Covid isolation rules and mask rules recently changed or lifted.
- Housing affordability, as well as availability, have been widely covered in the media. Housing remains a high priority at 33%. Although housing prices have decreased in recent months due to higher interest rates, the lack of supply, especially in the main capital cities such as Sydney, Melbourne, and Brisbane, remains severe. With higher interest rates and mortgage repayments, the housing concern will continue to be a high national priority.
- Australians are slightly more concerned about the environment at 28%, up from 27% in March 2022. 9% of Australians nominated infrastructure, and 5% selected transport as one of Australia's two highest priority issues today. Law and order and education generally remain at their previous levels with slight changes at 9% and 8%, respectively.



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

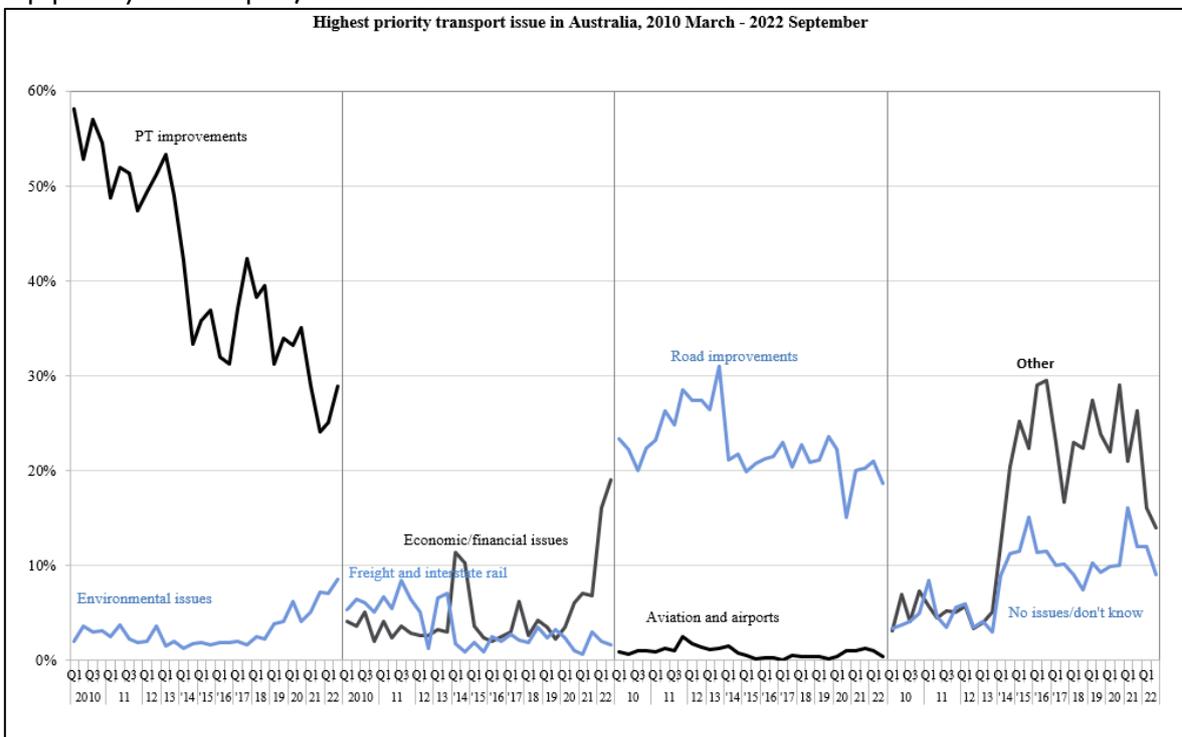
The priority of transport and infrastructure at the national level is regarded differently by residents in different states. The percentage of residents of most states nominating infrastructure and transport as top priorities has not changed significantly compared to March 2022. In September 2022, 9% of New South Wales residents selected transport as a priority compared to less than 1% of Western Australia residents, 6% of South Australia residents, 5% of Victoria residents and 3% of Queensland residents. 10% of Queenslanders, Victorians and South Australians selected infrastructure as one of the top two priorities compared to 8% of Western Australian residents and 9% of New South Wales residents.



### Highest priority issue for transport

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

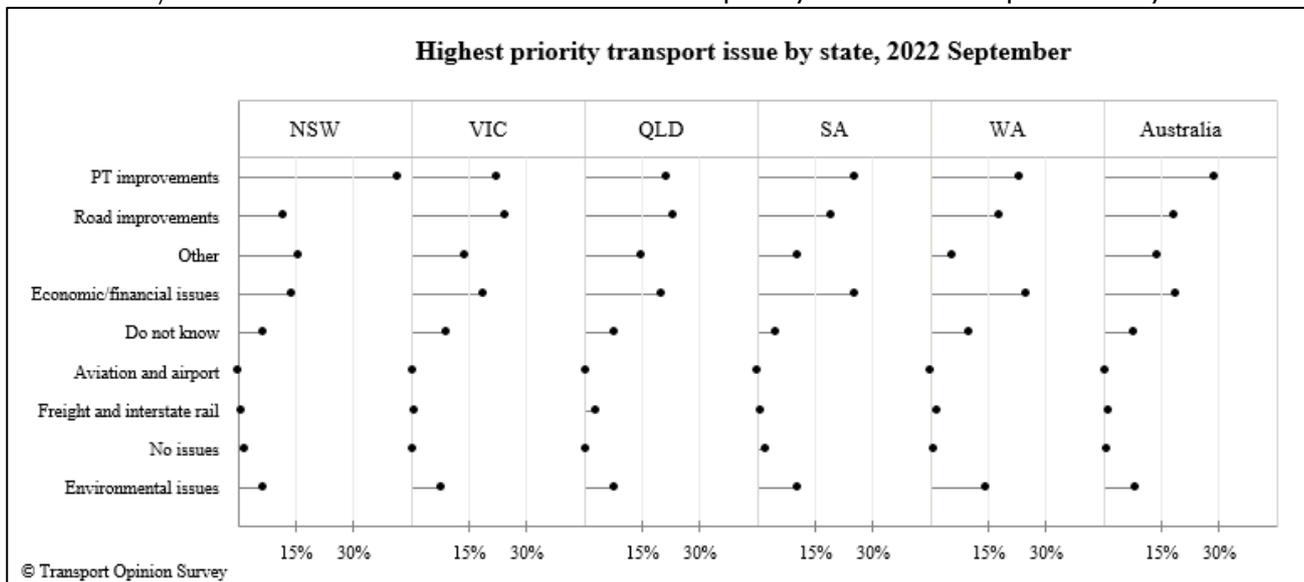
- In September 2022, 19% of Australians said that the highest priority for transport in Australia is economic and financial issues (up from 16% in March 2022 and 7% in September 2021). This priority on the economic and financial issues for transport has never been this high in the past. People have repeatedly mentioned sky-rocketing high petrol prices and increased travel costs. Public transport improvements have increased by 3% as a priority, with many people citing the recent public transport service issues due to ongoing union strikes. People nominated various priorities as "other" priorities in the past waves. In the September 2022 survey, people have less varied opinions, classified as other priorities. Hence the percentage of other priorities has decreased to 14% from 16% in March 2022 and further from 26% in September 2021. In September 2022, 29% and 19% of Australians nominated public transport and road improvements as the priority issue, respectively. Nearly 9% of Australians selected environmental issues as a top priority for transport, and most of them are related to the transition to electric vehicles.



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 lockdown, restrictions, safety, terrorism, and rebuilding transport after disasters.

- In the September 2022 survey, New South Wales, South Australia and Western Australia residents consider public transport improvements more important than road improvements (41.9% against 12% for NSW, 25.3% against 19.3% in South Australia, and 23.3% against 18.1% for Western Australia), especially in NSW. Many have mentioned the recent cancellation and massive delay of train services due

to industrial disputes. Road improvements are more important in other states, including Queensland and Victoria (e.g., 23.2% for QLD, and 24.4% for Victoria). Economic and financial issues are the first or the second highest priority in South Australia and Western Australia. In the ACT/TAS/NT, the economic and financial problems have the highest priority at 26%. Many have mentioned the recent soaring costs of petrol. The three most important priorities are public transport improvements, road improvements and economic/financial issues. Australians have more focused priority choices for transport currently.

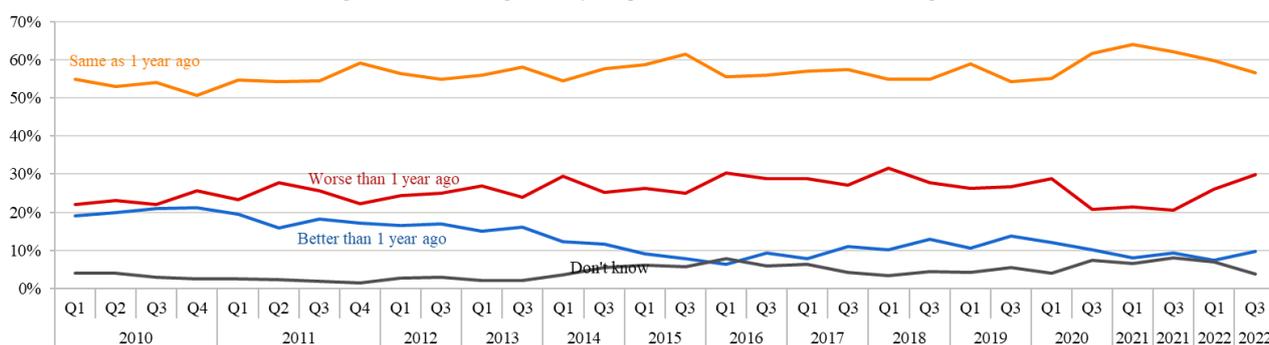


### Local transport differs across states and territories

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?

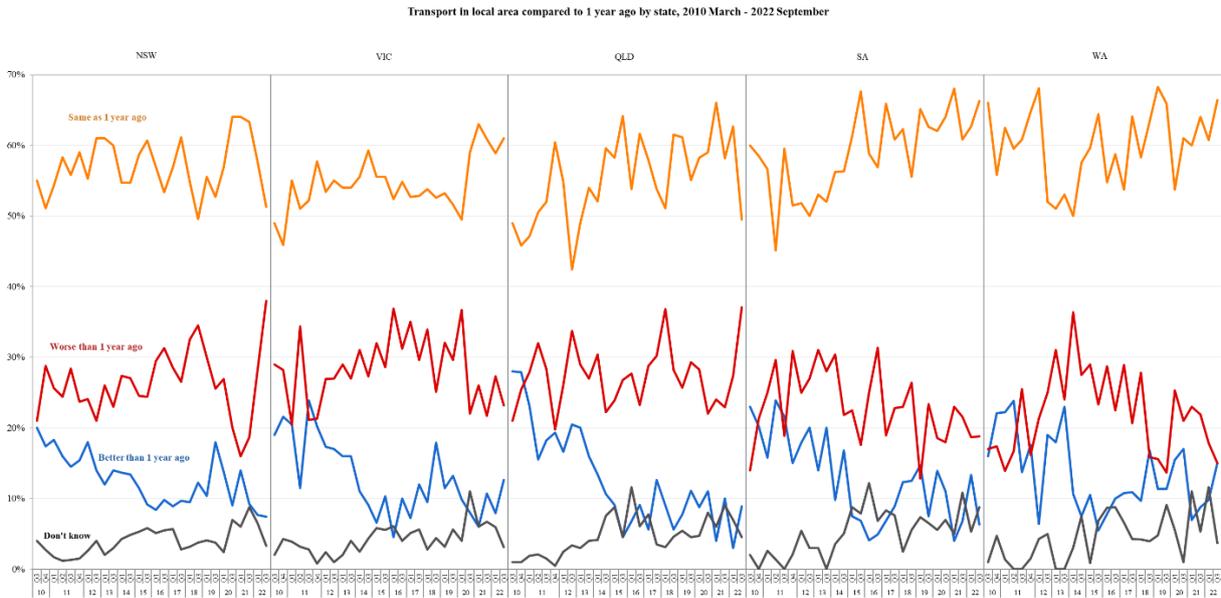
- In September 2022, 30% of Australians believed that transport in their local area was worse than one year ago (up from 26% in March 2022). About 57% of Australians said it is the same as one year ago (down from 60% in March 2022), and 10% of Australians said it is better now than one year ago (up from 7% in March 2022). Those who gave no opinions reduced from 7% in March 2022 to 4%, showing that Australians had stronger or clearer views on this issue.

Transport in local area compared to 1 year ago across Australia, 2010 March - 2022 September



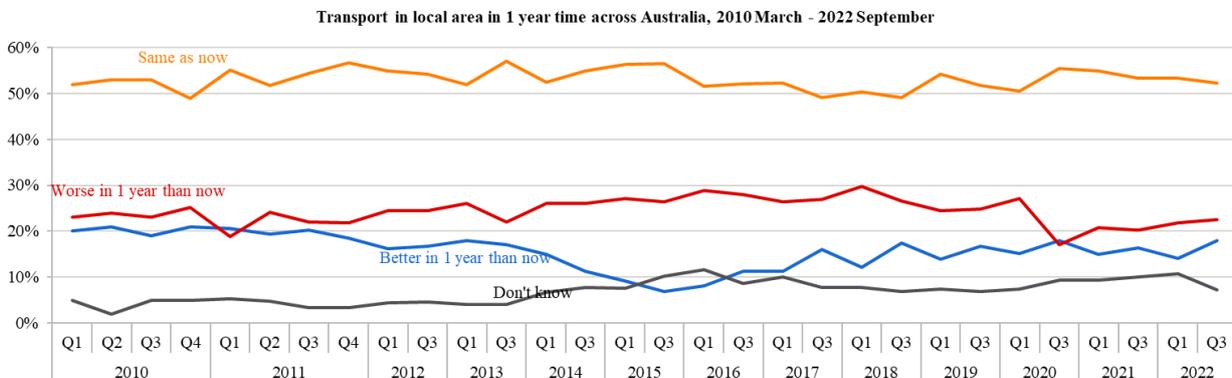
- Respondents' evaluation of transport in the local area is inconsistent across states of Australia. In VIC, 74% of respondents believe the state of transport is better or the same, higher than 67% in March 2022. In WA, the same number is 81% for September 2022, a 10% increase from 71% in March 2022. In contrast, in NSW, only 58% of people think that transport is better/same compared to March 2022, down from 72% in September 2021 and 66% in March 2022. The impact of the recent massive delays and cancellations of public transport services due to strikes clearly shows by the number. Residents in QLD also significantly decreased the percentage of thinking the transport is better or the same, from 66% in March to 59% in September. In QLD, the proportion of residents thinking that transport is worse is 37%, up from 27% in March 2022. According to data, transport in VIC and WA has improved significantly compared to one year ago, whilst NSW and QLD have become considerably worse compared to one year ago (e.g.,

due to strikes and floods). SA also performed worse, with fewer respondents believing the state of transport is better or the same, down from 76% in March 2022 to 72%.



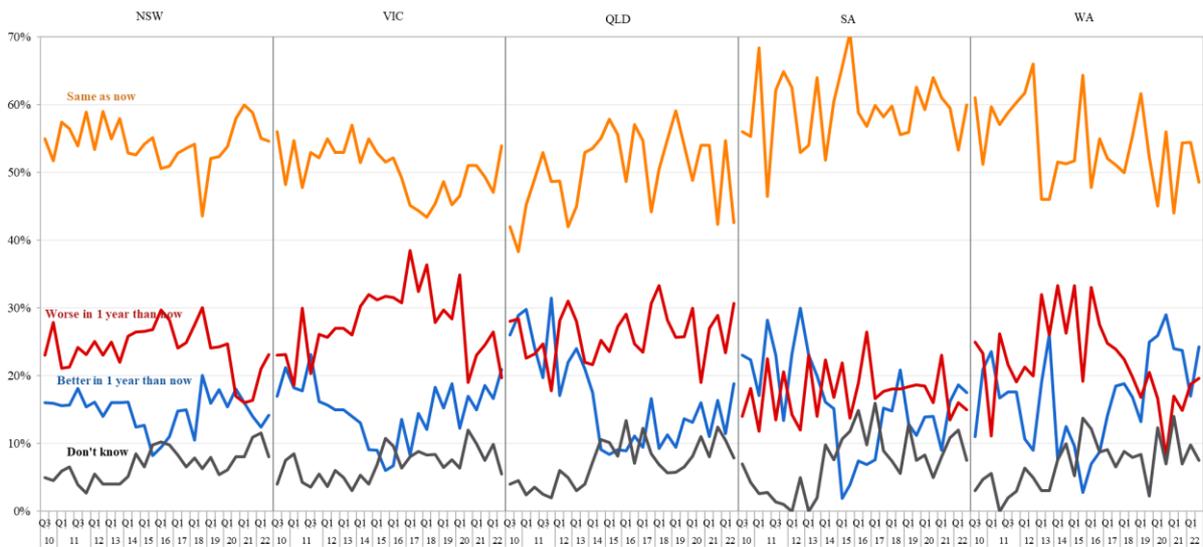
*Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?*

- In September 2022, 52% of Australians said that transport in their local area would be the same in one year's time. 18% said transport would be better, up from 14% in March 2022, while 23% said transport would be worse, slightly up from 22% in March 2022. Only 7% of Australians did not offer their views on this question, down from 11% in March 2022.



- Australians have responded with more confidence to transport in their local area in most states in one year, with some states showing strong opposing views, such as in QLD. In QLD, while 19% chose "better in one year's time", up from 11% in March 2022, there was a significant increase of 8% of those who chose "worse in one year's time" too. Those who held neutral views by choosing "same in one year's time" have decreased from 55% in March to 43%. A similar pattern also shows in NSW, with both who chose "better" and "worse" increasing slightly by 2%. VIC residents had shown more confidence, with those who chose "worse" reduced from 26% in March to 20%. Compared to the March 2022 survey figures, more people choose "same in one year's time" in SA (60%, up from 53%). WA residents also showed a significant increase in confidence, with 24% choosing "better in one year's time", up from 17% in March 2022. Across all states, the confidence level is the lowest in NSW, with only 14% choosing "better", compared to a minimum of 18% for the same measure for other states. This low confidence level aligns with the massive delays and cancellations of public transport services due to union strikes in recent times.

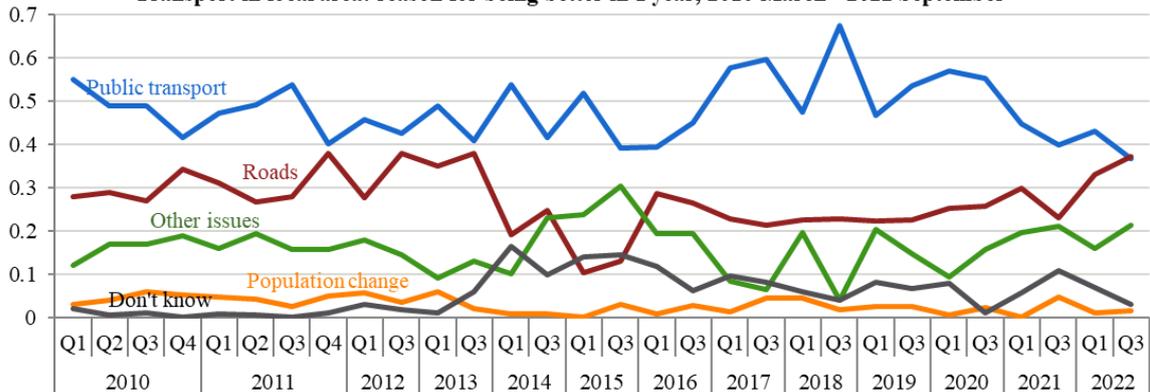
Transport in local area in 1 year time by state, 2010 March - 2022 September



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

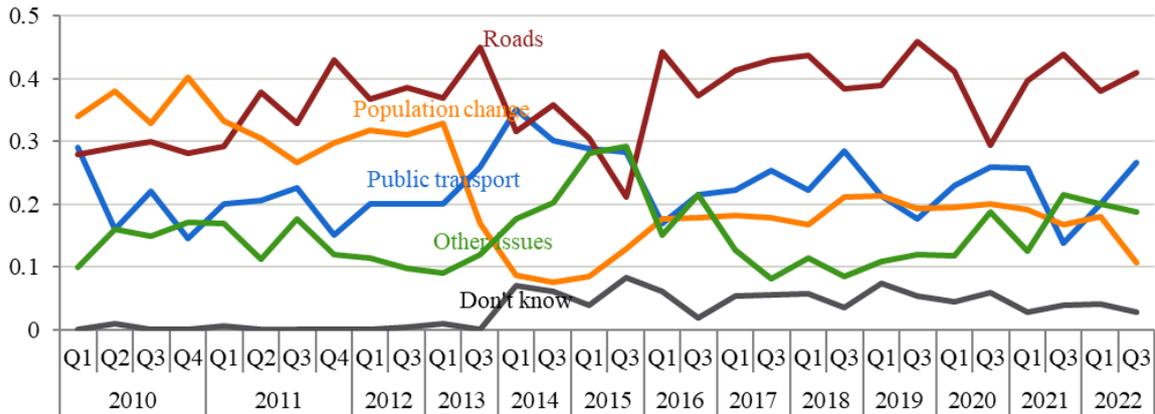
- Public transport and road improvements are still the main reasons Australians believe that transport will improve or worsen in the local areas. Public transport service and roads are the main reason for residents to think that their local transport will be better in one year (top figure) both at 37%, while roads are the main reasons for residents to believe that their local transport will be worse (bottom figure) in one year at 41%. People mentioned union strikes and poor and unfixed roads as the main reasons they believed that transport in local areas would worsen in one year. Other issues such as cost of living and fuel are the third reason people thought their local transport would be worse. In contrast, recovery from the pandemic, new government, more jobs and investment are other favourable reasons that people offered if they believed the local transport would improve in one year's time.

Transport in local area: reason for being better in 1 year, 2010 March - 2022 September



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.

**Transport in local area: reason for being worse in 1 year, 2010 March - 2022 September**



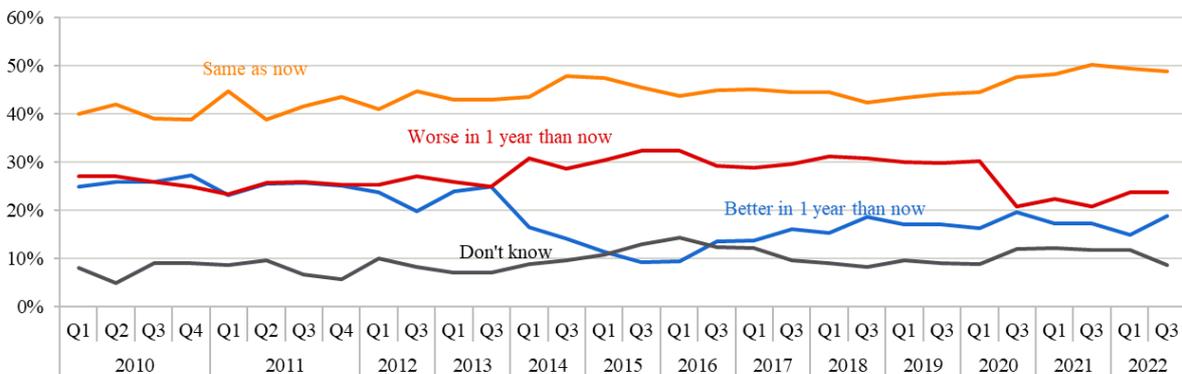
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, lockdowns, health, border closure and issues not included in public transport, road and population change categories.

**Confidence about transport in Australia becomes better in both short-term and long-term**

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?

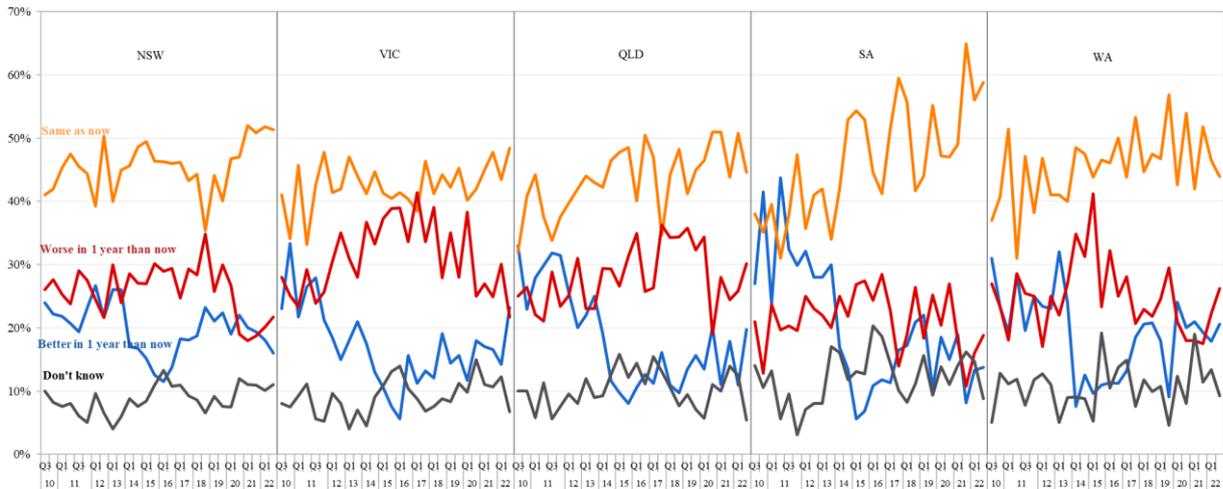
- In September 2022, 49% of Australians said that the state of transport in Australia in one year's time will be the same as now, with 19% of Australians saying that transport in Australia will be better in one year's time, up from 15% in March 2022. In contrast, 24% of Australians said that the state of transport in Australia in one year's time would get worse (identical to March 2022).

**Transport in Australia in 1 year, 2010 March - 2022 September**



- In September 2022, about 22% of NSW residents said that the state of transport in Australia would worsen in one year, up from 20% in March 2022. In contrast, 23% of VIC residents said that the state of transport in Australia would be better in one year, up from 14% in March 2021. A similar increase in public confidence also occurred in QLD, with 20% of QLD residents saying the state of transport in Australia in one year would be better, up from 11% in March 2022. SA is the only state where the percentages of residents who believed transport in Australia would become better, same or worse have all increased, with those offering no opinions declining by 6%. In WA, there has been an increase in the percentage of residents who believed the state of transport in Australia would become better or worse in one year, by 3% and 2% from March 2022, respectively. Overall, Australians offered a clearer view on this question, with those who gave no opinion reduced to 9% from 12% in March 2022.

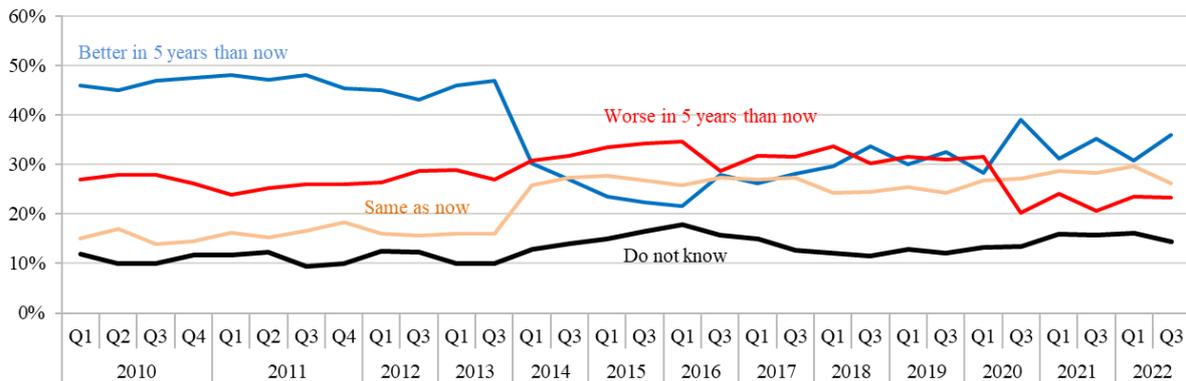
Transport in Australia in 1 year time by state, 2010 March - 2022 September



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?

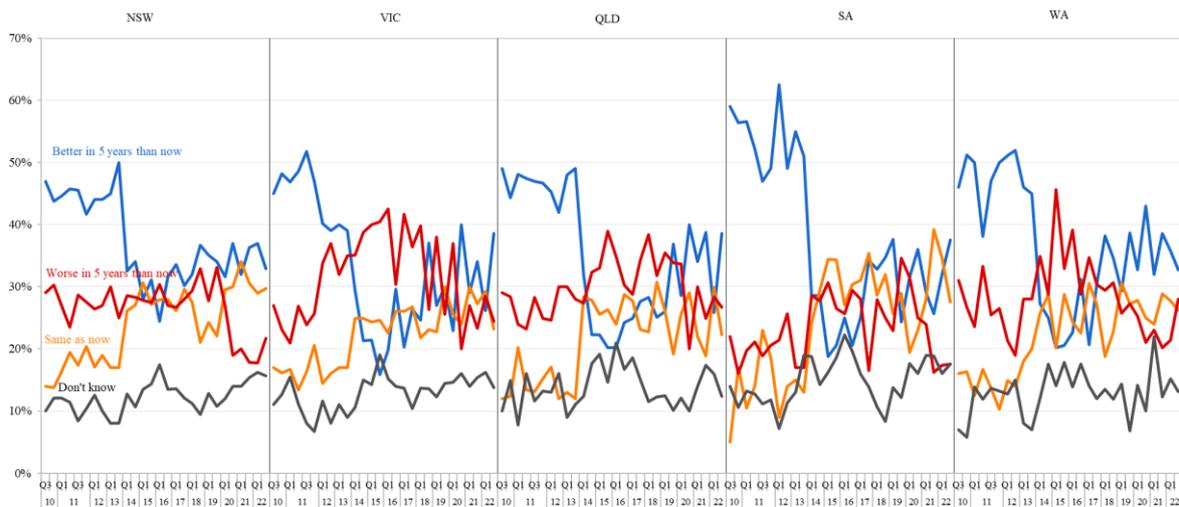
- Australians are more confident that the state of transport will be better in five years' time than it is now. In September 2022, 36% of Australian residents believed transport in Australia would be better in five years' time, up from 31% in March 2022. People who think that the state of transport in Australia will worsen in five years, remaining at 23%, which is identical to March 2022.

Transport in Australia in 5 years, 2010 March - 2022 September



- Australians across all states are gaining more long-term confidence about transport, especially in VIC, QLD and SA. In September 2022, the proportions of Australian residents in every state except NSW and SA who believe Australia's transport will be better in five years have increased, 13% more in VIC, 13% more in QLD, and 6% more in SA compared to March 2022. NSW residents believe that the state of transport in Australia in five years' time will be worse at 33%, down from 37% in March 2022. The pessimistic views of NSW residents may be closely related to the recent train delays and cancellations due to the industrial dispute between the NSW government and the RTBU union. In WA, the long-term confidence of people also dropped from March 2022, with 7% extra WA residents who think the state of transport in Australia in five years will be worse.

Transport in Australia in 5 years by state, 2010 March - 2022 September



### Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey about transport becoming 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 the state of transport getting better is more substantial relative to March 2010. A TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

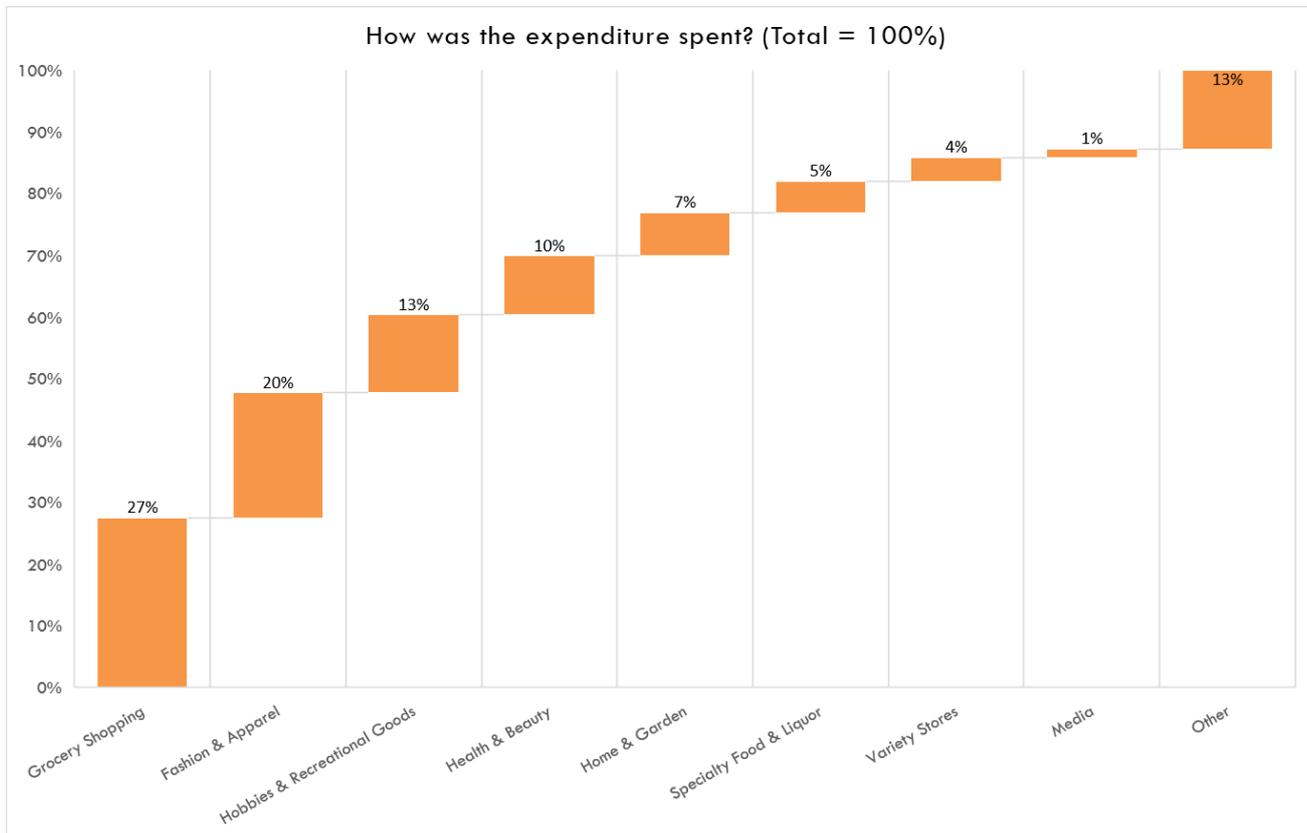
The TOPS Index shows that in the September 2022 quarter as compared to September 2021 (one year earlier):

- Australians have become less confident about improvements in transport in their local area in one year's time (but more confident compared to March 2022).
- Australians have become less confident about Australia's transport improvements in one year's time (but more confident compared to March 2022).
- Australians have become less confidence about Australia's transport improvements in five years' time (but more confident compared to March 2022).

Compared to the launch of TOPS in March 2010, Australians are less confident about improvements in transport in their local area in September 2022 (Confidence index: from 100 to 94) and in Australia in the next year (Confidence index: from 100 to 91) and are less confident about improvements in transport in Australia in five years' time (Confidence index: from 100 to 96). There has been a significant improvement in confidence since March 2022, showing Australians are more confident about future enhancements in transport. They have started to recover from the chain of adverse events from late 2021 to early 2022. These events include the spread of Omicron, the war in Ukraine, the soaring cost of living and petrol prices, severe floods and related transport infrastructure damage, and public transport problems due to industrial disputes and flood damages. The consequences of some of these events, such as flood damages, the Ukraine war, and increased cost of living, will continue to impact transport, but people have more time to adapt to or recover from these changes compared to early 2022.



Among all the categories Australians purchased online, grocery shopping and fashion/apparel rank the top two categories, contributing to 27% and 20% of online spending. These two categories are followed by spending on hobbies and recreational goods (13%), health and beauty products (10%) and home and garden products (7%). Together these five categories account for 77% of the total online spending.



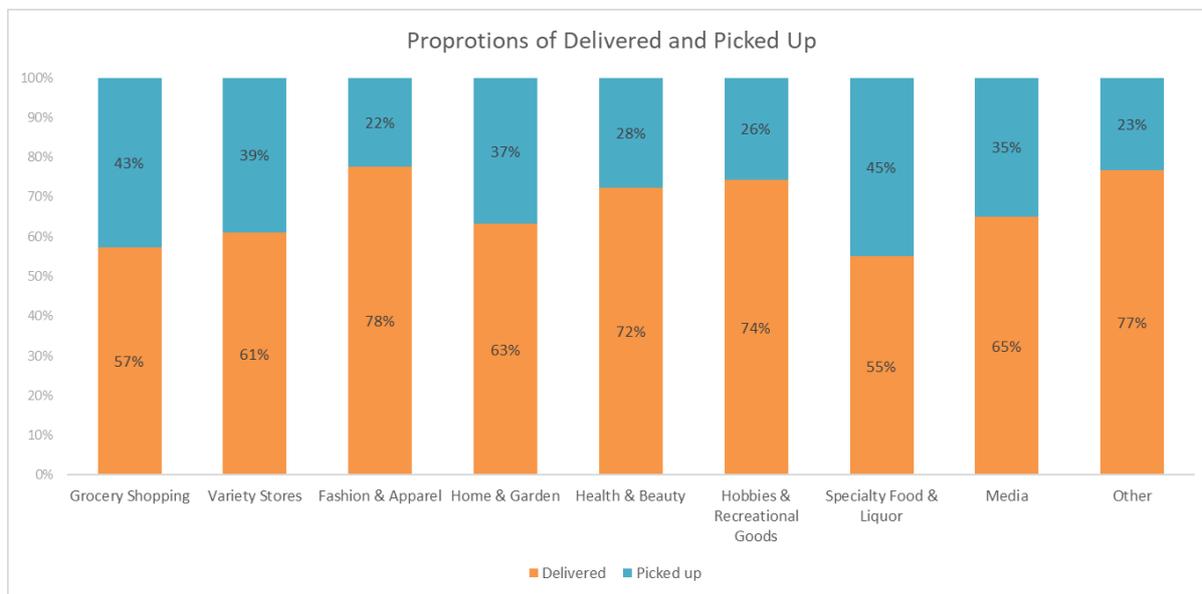
The spending shares for categories in this survey align well with the recent "Australia Post: 2022 Inside Australian Online Shopping – eCommerce Industry Report" published by AusPost<sup>1</sup>. The AusPost report provides the shares of online shopping volumes for the same categories. The R-Squared ( $R^2$ ) for the linear trendline of the spending and volume shares is 0.75, meaning the two shares are closely related.

	Share of Spending TOPS (Sep-2022)	Share of Volume AusPost (2022)
<b>Grocery &amp; Variety Stores</b>	36%	34%
<b>Fashion &amp; Apparel</b>	23%	26%
<b>Home &amp; Garden</b>	8%	15%
<b>Health &amp; Beauty</b>	11%	9%
<b>Hobbies &amp; Recreational Goods</b>	14%	7%
<b>Specialty Food &amp; Liquor</b>	6%	5%
<b>Media</b>	2%	5%

Note: The AusPost report counts major and discounted stores as "variety stores". In TOPS, grocery stores and variety stores are separately defined to be more precise. Grocery stores include major supermarkets such as Woolworths and Coles.

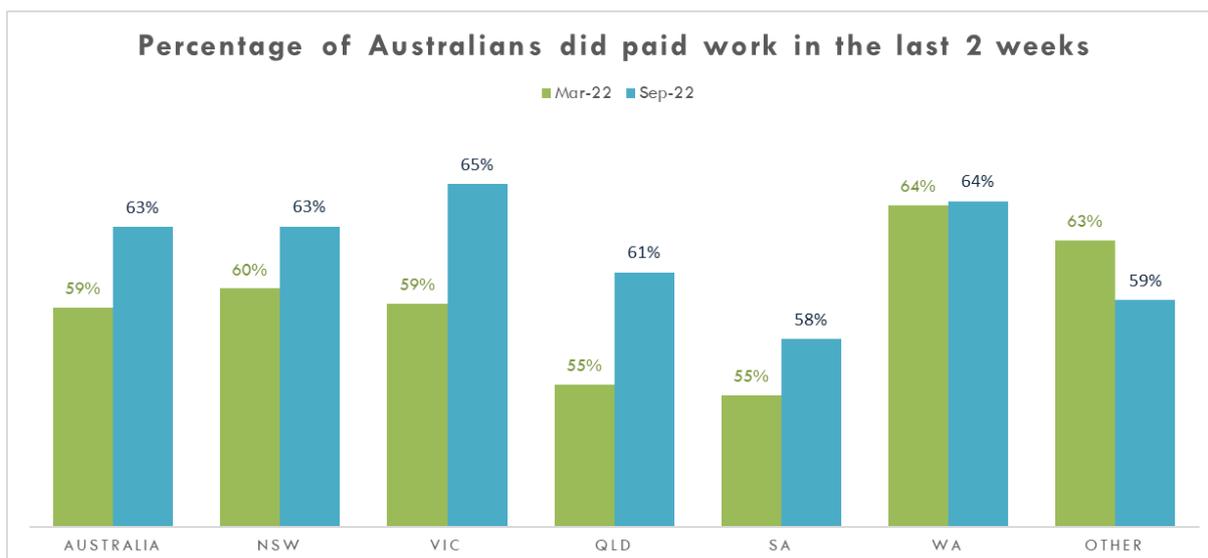
<sup>1</sup> [https://auspost.com.au/content/dam/auspost\\_corp/media/documents/ecommerce-industry-report-2022.pdf](https://auspost.com.au/content/dam/auspost_corp/media/documents/ecommerce-industry-report-2022.pdf)

Due to the distribution channels and products ordered, online shoppers have different delivery needs across categories. For example, for grocery goods, specialty food and liquors, variety stores and home and garden products, retailers are more likely to have physical stores and outlets, around 37% to 45% of the purchased goods were collected by shoppers. For many other categories, such as fashion and apparel, health and beauty products, and hobbies and recreational products, online shoppers are more likely to order from online vendors without a store. The proportion of home delivery is higher at over 70%. Besides, some goods such as clothing and cosmetics are probably easier for home delivery, due to weight or other factors, compared to grocery categories.

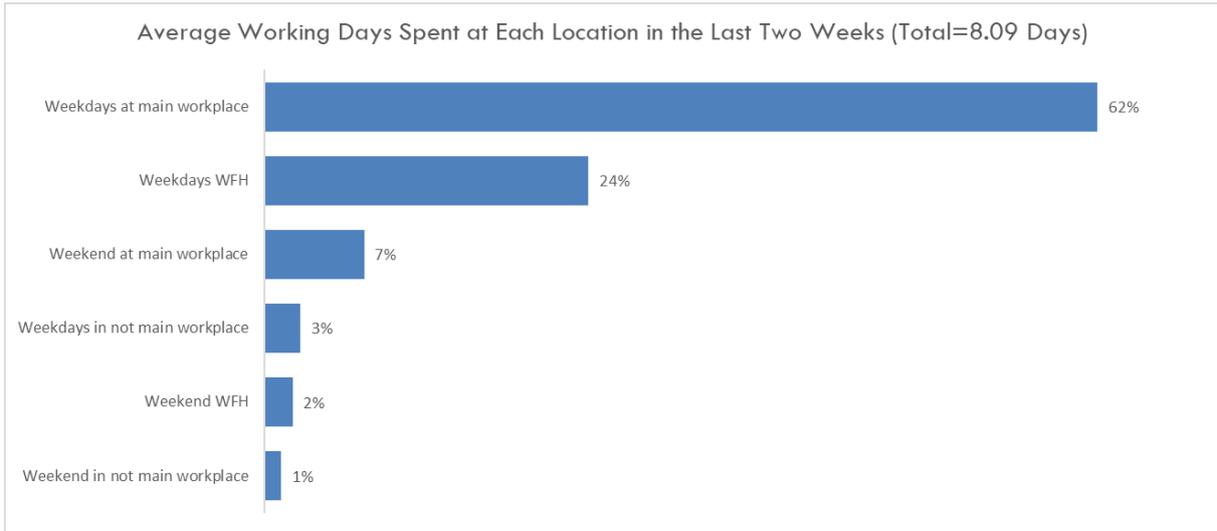


## Working from home

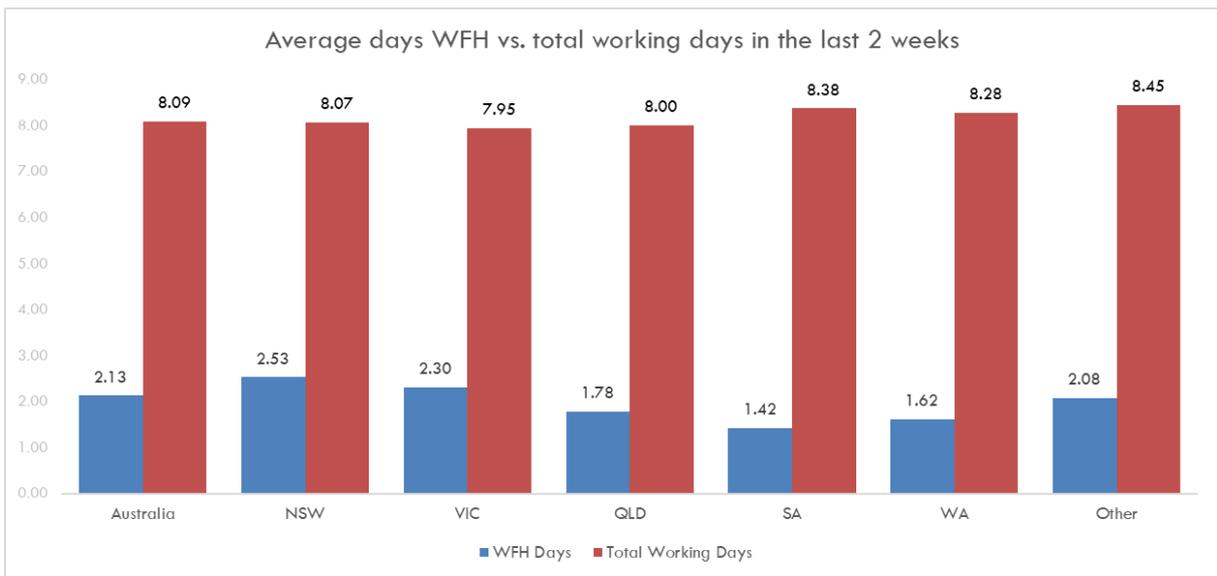
We asked respondents about the number of days they did paid work in the last two weeks. We used two weeks to allow for flexibility given the fluctuating working hours for different employment arrangements such as part-time, casual, contract, and multiple jobs. Compared to the result for this question for March 2022 at 59%, a higher proportion of 63% of Australians has undertaken paid work during the last two weeks. Victoria and Queensland have the highest level of increase at 6%.



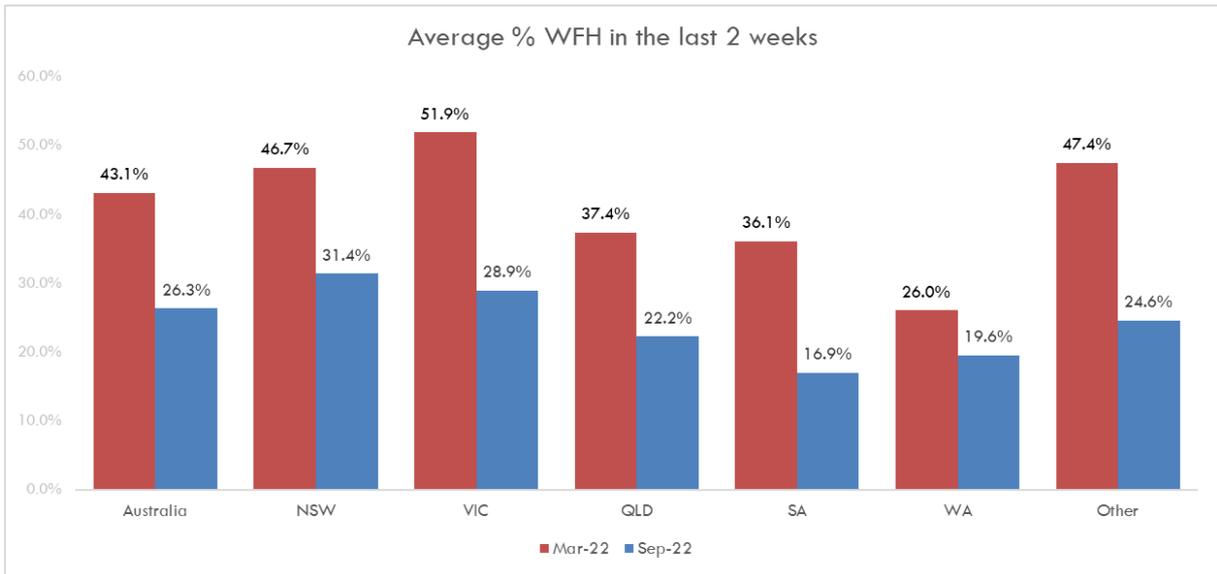
Australians undertook an average of 8.09 days of paid work during the last two weeks, with 26% of the working days from home, including weekdays and weekends, decreasing from 43% in March 2022. Most working hours are spent at the main workplace, with 62% and 7% recorded for weekdays and weekends respectively. People undertook about 4% of working hours outside the main workplace and home, at an alternative workplace such as a satellite office, cafe, or library close to home.



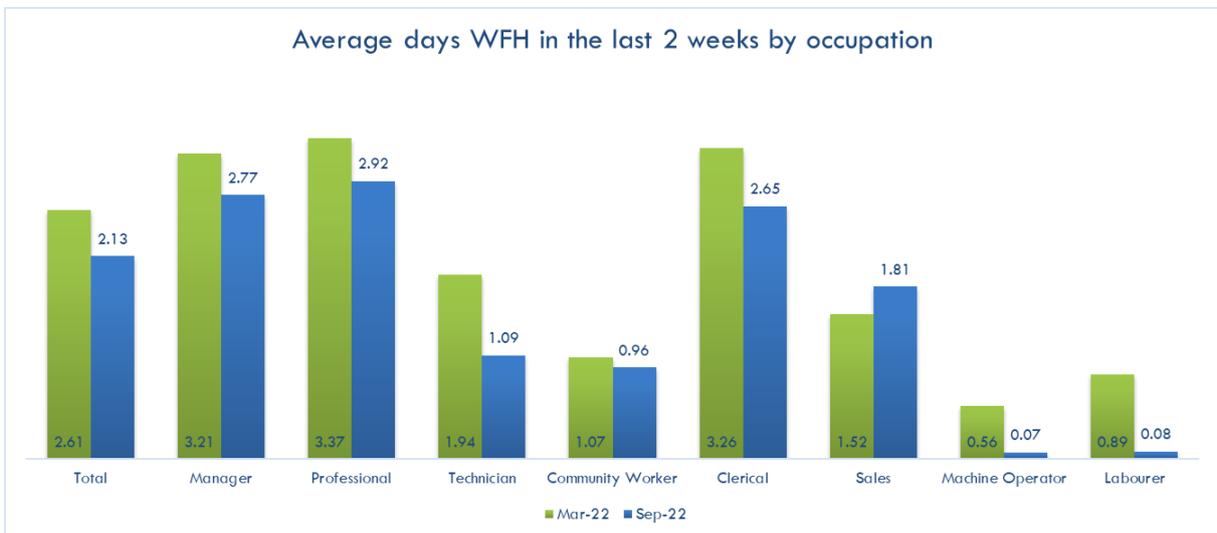
Among the average 8.09 working days during the last two weeks, working Australians spent 2.13 days (or 26.3%) working from home (WFH). In the last two weeks, workers in SA had the second highest total working days (8.38 days) but the lowest number of WFH days at 1.42 days. Workers in NSW and VIC spent the longest working from home days at 2.53 and 2.30 days.



Comparing the results for March and September 2022, we found working Australians have worked less from home in September, showing a decreasing but more consistent trend in the number of days working from home post-pandemic. The WFH proportion is 26.3% in Australia, decreased from 43.1% in March 2022. The WFH proportion is the highest in NSW at 31.4%, followed by 28.9% in VIC. The most significant reduction of WFH days occurred in SA, ACT/TAS/NT, and VIC, reduced by 53%, 48% and 43%, respectively, from the March figures. WFH proportions reduced the least in WA and NSW from the March figures.



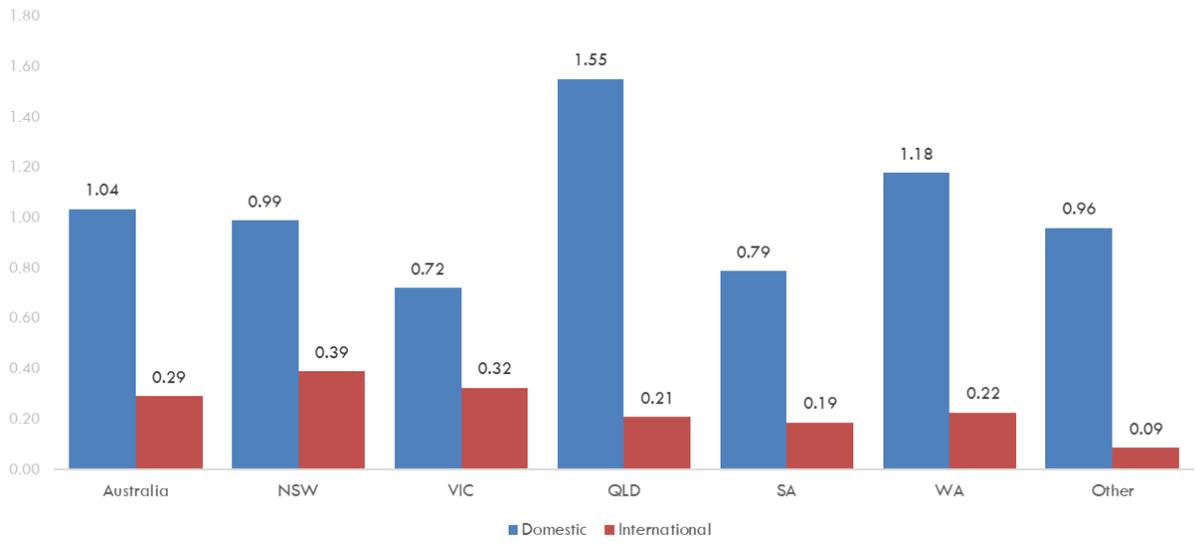
Comparing the results for March and September 2022, we found almost all occupations have worked less from home in September. Managers, professionals, and clerical and administrative workers continue to work with the highest number of days from home (at 2.77, 2.92, and 2.65 days every two weeks, respectively). Machine operators and labourers have returned to their main workplace, given that their jobs are predominantly done on-site. Technicians have also reduced their WFH days by almost half since their work requires them to work primarily on-site. Sales workers work more from home, possibly due to the increasing online sales. Community workers have remained at a similar level to March 2022 on the WFH proportion.



## Air Travel

The average number of domestic and international travel by air for 2022 are respectively 1.04 and 0.29 times for departures in Australia. Queenslanders have the highest level of domestic air travel, averaging 1.55 times for 2022. People in New South Wales have the highest level of international air travel, with an average of 0.39 times for 2022.

How many air trips have you undertake since January 2022 and plan to take up to December 2022?



## 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: August 23rd – September 5th 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: March 23rd – April 13th
- 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: February 26th – March 6th 2018
- September 2018: August 30th – September 1st 2018
- March 2019: February 21st – March 5th 2019
- September 2019: 6-9 September 2019
- March 2020: February 26th – March 4th 2020
- September 2020: August 31st – September 3rd 2020
- March 2021: March 4th – March 14th 2021
- September 2021: September 14th – September 24th 2021
- March 2022: March 1st – March 13th 2022
- September 2022: September 1st – September 7th 2022

## More information

Visit the TOPS website for quarterly reports and media coverage and 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.

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

Email [business.itlsinfo@sydney.edu.au](mailto:business.itlsinfo@sydney.edu.au)