

THE UNIVERSITY OF
SYDNEY
—
Business School

Transport Opinion Survey (TOPS)

March 2022

Institute of Transport and Logistics Studies (ITLS)

Highlights

Note: This survey was conducted from March 1st to March 13th, 2022. All states continue to cope with the Omicron variant with restrictions eased. During the survey period, the Russian-Ukraine war continued. The heavy rainfall in QLD and NSW has caused severe floods and infrastructure damage. The industrial dispute between the NSW state government and the rail union caused train cancellations and delays. Soaring petrol price and cost of living, housing, flood and other factors negatively impact Australians' confidence in transport, and broadly to the economy. Consequently, the confidence in the future of transport improvements has decreased significantly compared to September 2021.

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

- In March 2022, 46% of Australians nominated health and 36% selected economy and employment as one of Australia's two highest priority issues today. However, both areas have dropped from the levels in September 2021. Housing becomes the third-highest ranked priority at 32%, up from 20% in September 2021.

Economic and financial issues increased rapidly as one of the top priorities for transport

- In March 2022, 25% of Australians said that the highest priority issue for transport in Australia is public transport improvements, up slightly from 24% in September 2021. Road improvements (21%) is the second-highest priority. Economic and financial issues have increased to 16% from 7% in September 2021 predominantly due to the high petrol costs.

Transport in local areas becomes worse

- In March 2022, 26% of Australians said that transport in their local areas is worse than one year ago, up from 21% in September 2021.

A slightly lower level of confidence about local transport in the short-term

- In March 2022, 14% of Australians said that transport in their local area would be better in one year's time, down from 16% in September 2021.

A slightly lower level of confidence about transport in Australia in the short-term

- In March 2022, 15% of Australians thought that transport in Australia would be better in one year, down from 17% in September 2021.

Australians have less confidence about transport in Australia in the longer-term

- In March 2022, 31% of Australians thought that transport in Australia would be better in five years, down from 35% in September 2021.

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 84), have less confidence across Australia in one year's time (Confidence index: down from 100 to 80), and have less confidence in five years' time (Confidence index: down from 100 to 89).

About 73% of Australians ordered online in the last four weeks

- 73% of Australians made online order(s) in the last four weeks among all respondents asked. On average, people order 2.97 times per week, with 61% delivered to home or elsewhere, and 39% of the time they go and collect goods (click and collect).

Working people spend 43% of their work hours working from home (WFH)

- Of the 59% of respondents who have undertaken paid work in the last two weeks, they work on average 25 hours per week, including working full-time, part-time, casual, contract, or other forms¹. 43% of all

¹ <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-account-australia/latest-release>

working hours are WFH hours, equivalent to 1.3 days per week. Professionals, managers, and clerical/admin workers work from home more than other workers.

About the Transport Opinion Survey

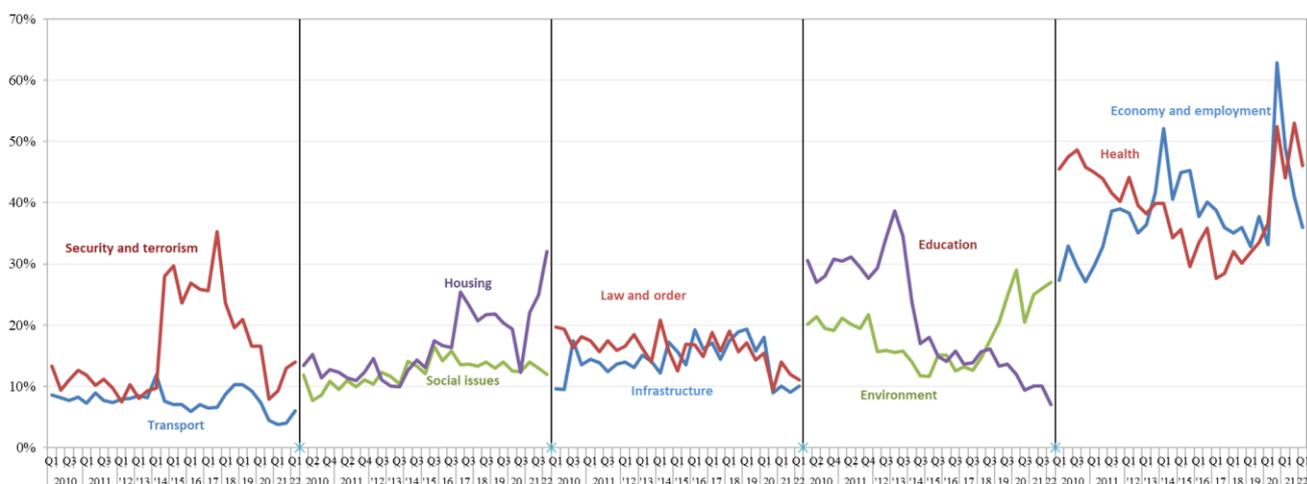
The Transport Opinion Survey is a biannual survey (quarterly from 2010) of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. The survey methodology was changed to an online survey from March 2014, using an online panel. The March 2022 survey was conducted between the 1st and 13th of March. 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?

- In March 2022, the priority that increased most from the September 2021 survey is housing, up from 20% to 32% nominated by Australians. Australia's housing price increased over 20% in 2021, even higher in the main capital cities such as Sydney, Melbourne, and Brisbane. Housing affordability, as well as availability, have been widely covered in the media. Australians are slightly more concerned about the environment at 27%, up from 26% in September 2021. They also have more concerns about transport (6% up from 4%) and security and terrorism (14% up from 13%). They are less concerned about health at 46%, down from 53% in September 2021. Australians have been adopting the "living with the Covid" approach for several months, and they seem to be less nervous about the pandemic. Concerns about the economy and employment have decreased from 41% in September 2021 to 36%, reflecting the positive aspect of the historically low unemployment rate of 4%, the best since 2008.
- These changes reflect the shift of public concern away from health and economy/employment in the previous wave in September 2021 under the lockdown due to the Delta variant. Australians have since followed the current approach and have fewer concerns about the pandemic, with most restrictions eased. Their problems are related to living expenses with housing and household spending. The levels of attention on transport have increased for the first time since September 2020, showing that people are slowly moving back to commuting and travel.
- 10% of Australians nominated infrastructure, and 6% selected transport as one of Australia's two highest priority issues today.

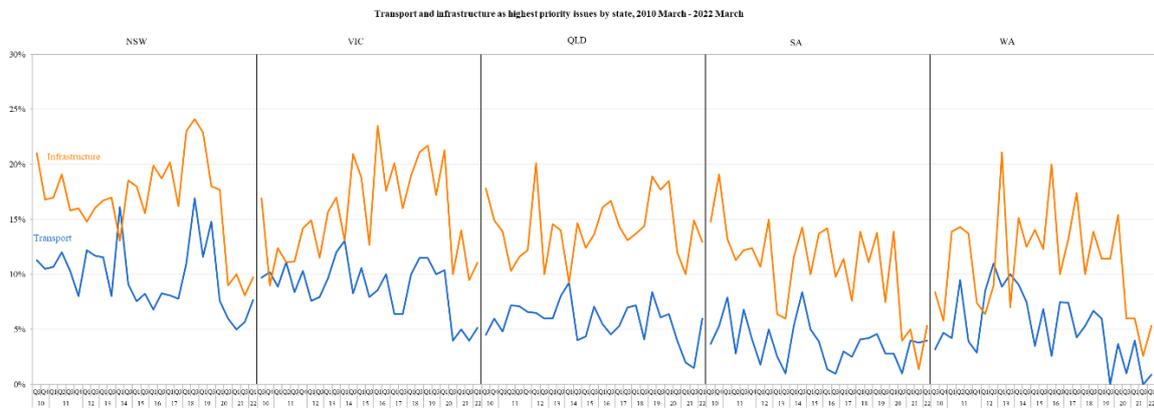
Issues selected as one of the top 2 priority issues in Australia, 2010 March - 2022 March



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. There are increases in the percentage of residents of most states nominating infrastructure and transport as top priorities compared to September 2021. In March 2022, 8% of New South Wales residents nominated transport as a priority compared to 1% of Western Australia residents, 4% of South Australia residents, 5% of Victoria residents and 6% of Queensland residents. 13% of Queenslanders and 11% of Victorians selected

infrastructure as one of the priorities compared to 5% of South Australian residents and 5% of Western Australian residents.

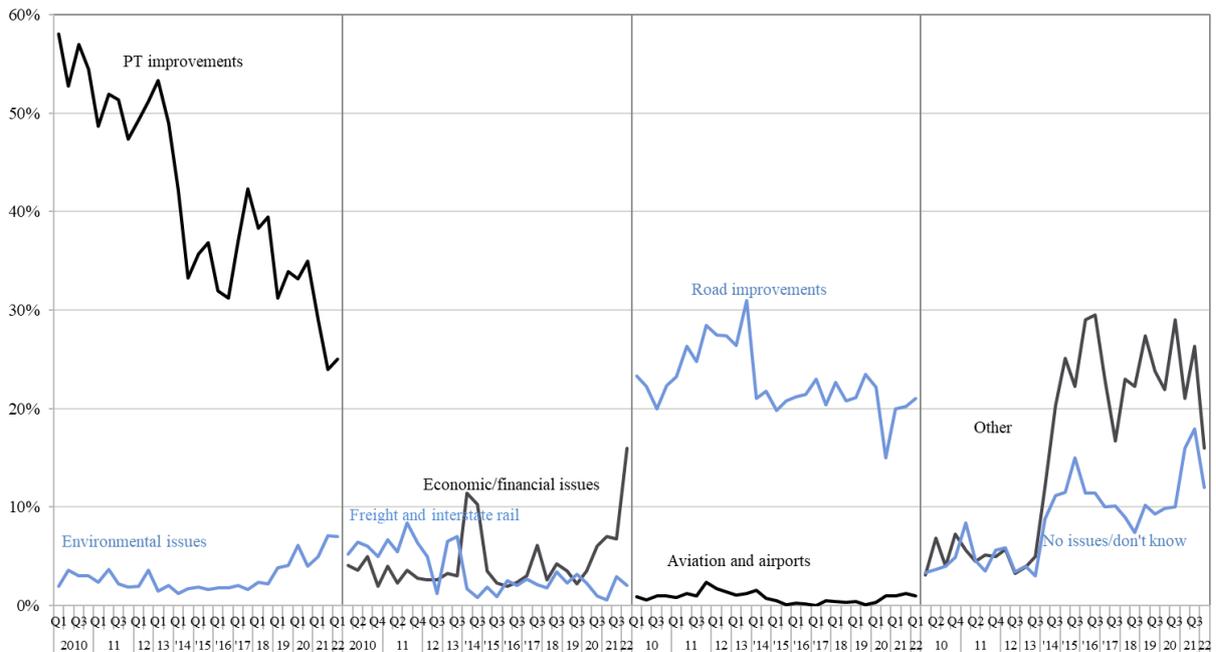


Highest priority issue for transport

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

- In March 2022, 16% of Australians said that the highest priority issue for transport in Australia is economical and financial issues (up from 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 skyrocketing high petrol prices and increased travel costs overall. Public transport and road improvements have increased by 1% as a priority. People nominated various priorities as "other" priorities in the past waves. In the March 2022 survey, people have less varied opinions, classified as other priorities. Hence the percentage of other priorities has decreased to 16% from 26% in September 2021. In March 2021, 25% and 21% of Australians nominated public transport and road improvements as the priority issue, respectively.

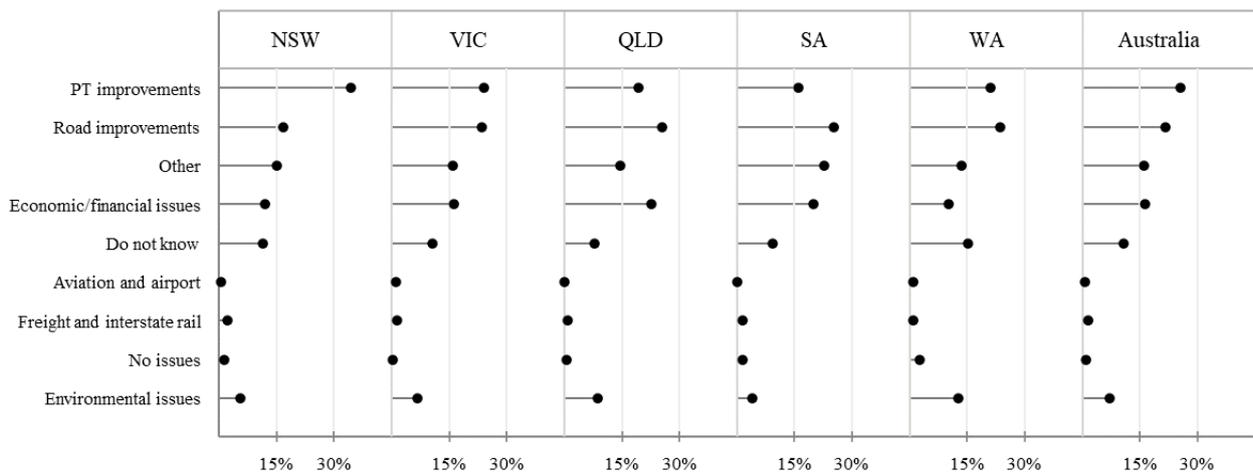
Highest priority transport issue in Australia, 2010 March - 2022 March



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 March 2022 survey, New South Wales and Victoria residents consider public transport improvements more important than road improvements (34.6% against 16.9% for NSW and 24.2% against 23.4% for VIC), especially in NSW. Many have mentioned the recent cancellation and massive delay of train services due to industrial dispute and floods. In other states, including Queensland, South Australia and West Australia, road improvements are more important (e.g., 25.6% for QLD, 25.3% for SA and 23.5% for WA). Economic and financial issues are the second or the third-highest priority in NSW, VIC, SA and WA. In the ACT/TAS/NT, the economic and financial issues have the highest priority. Many have mentioned the recent soaring costs of petrol. Overall, public transport improvements, road improvements and economic/financial issues are the three most important priorities. Other issues dropped from the highest priority position in the previous wave to the fourth highest priority. Australians have more focused priority choices currently.

Highest priority transport issue by state, 2022 March



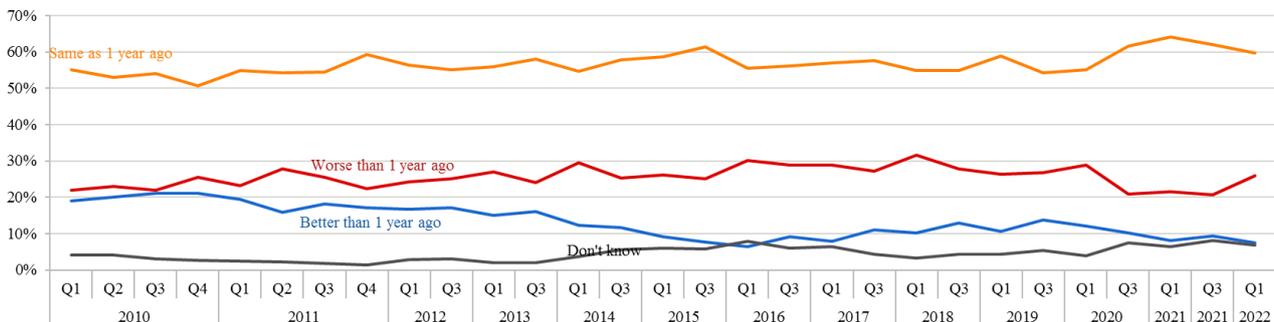
© Transport Opinion Survey

Local transport is worse and people's confidence is decreasing

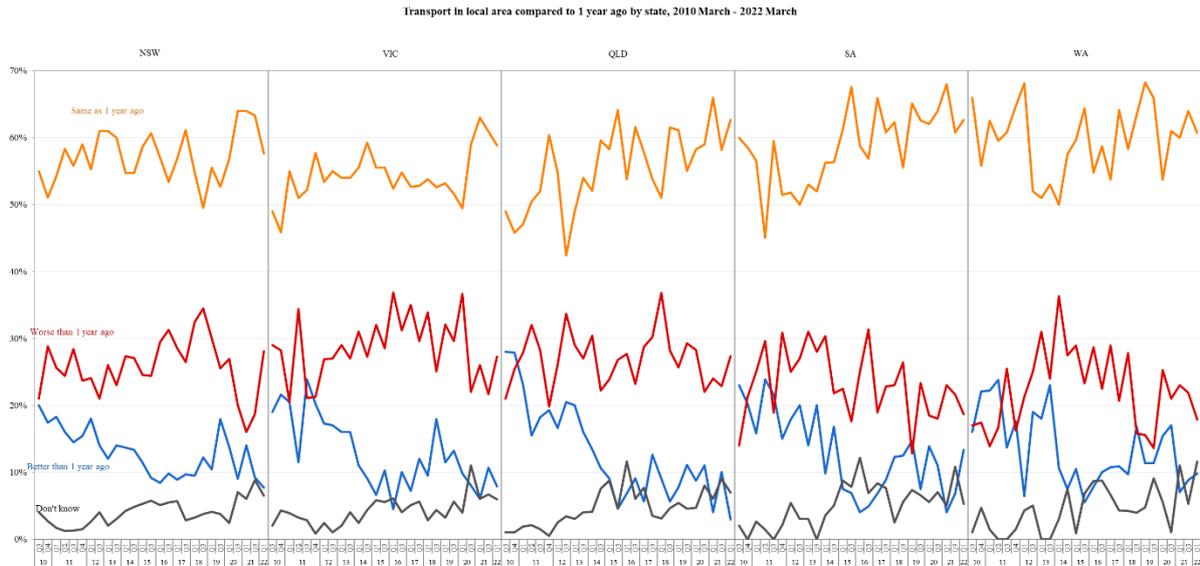
Compared to 1 year ago, do you think the state of transport in general in your local area is better now, the same, or worse now?

- In March, 7% of Australians believed that transport in their local area is worse now than one year ago (down from 8% in March 2021), while 60% of Australians said it is the same as one year ago (down from 64% in March 2021), and 26% of Australian said it is worse now than one year ago (up from 22%). These numbers are close to the results in March 2021.

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

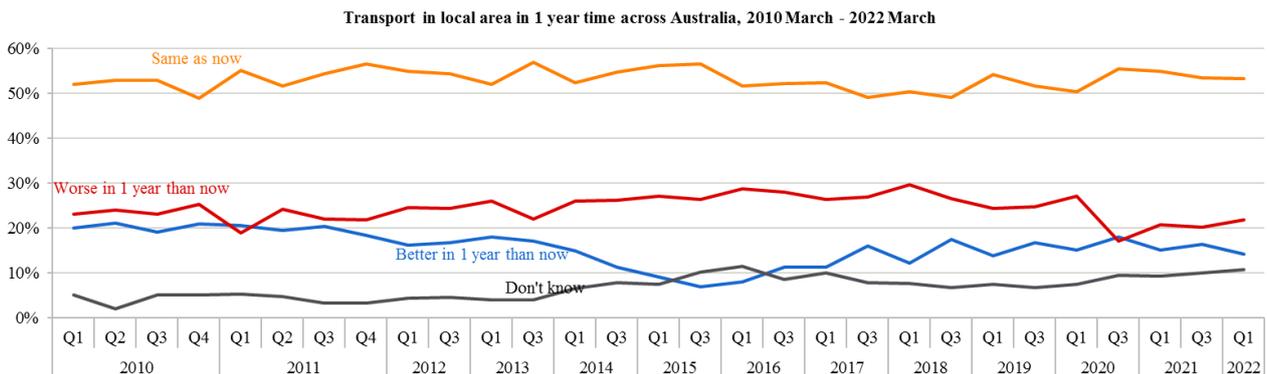


- Respondents' evaluation of transport in the local area is not consistent in all states of Australia. In SA, 76% of respondents believe the state of transport is better, or the same, higher than 68% in September 2021. In WA, the same number is 71% in March 2022, lower than 73% in September 2021. In contrast, in NSW only 66% of people think that transport is better/same compared to one year ago, down from 72% in September 2021. Residents in VIC and QLD had a slightly decrease in the percentage thinking the transport is better or the same. In VIC, the proportion of residents thinking that transport is becoming better in their local area is 8%, down from 11% in September 2021. However, in QLD, the proportion of residents thinking that transport is better is only 3%, down from 10% in September 2021.



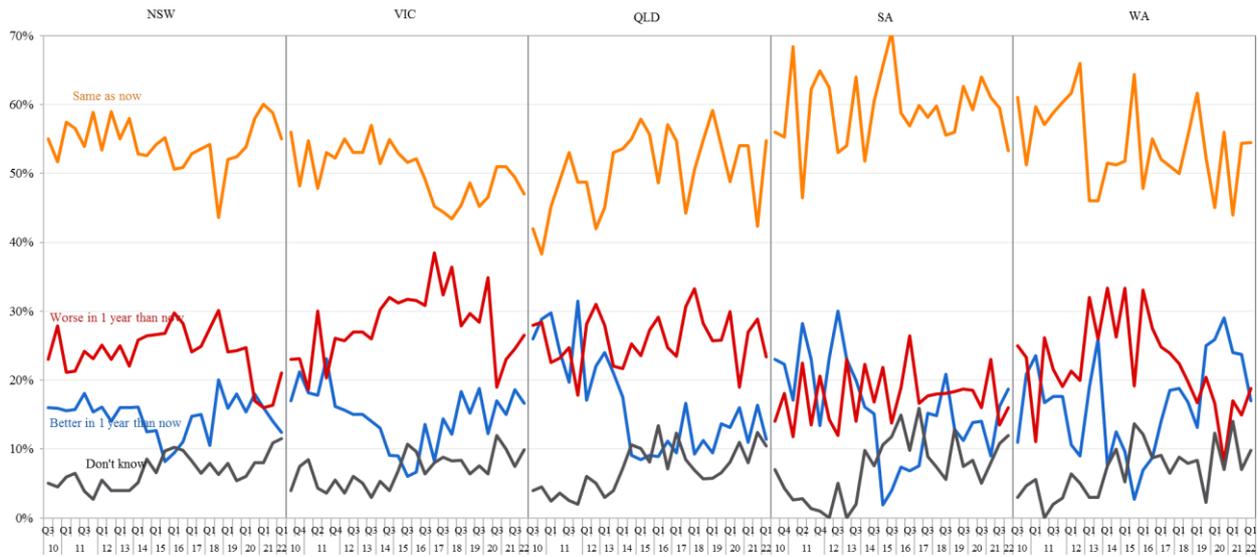
Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In March 2022, 53% of Australians said that transport in their local area would be the same in one year's time. 14% said transport would be better, down from 16% in September 2021, while 22% said transport would be worse, up from 20% in September 2021.



- Australians have responded with less confidence to transport in their local area in most states in one year, except in SA. with the most significant confidence increase recorded in SA (19% chose "better in one year's time", up from 9% in March 2021 and 16% in September 2021). In contrast, compared to the figures in the September 2021 survey, less people are choosing "better in one year's time" in NSW (12%, down from 14%), VIC (17%, down from 19%), QLD (11%, down from 16%) and WA (17%, down from 24%). More QLD residents believe that the transport in the local areas will remain the same in one year's time (55%, up from 42% in September 2021). The least optimistic group are people living in NSW, and 21% of them choosing that transport would be worse in one year's time (up from 16% in September 2021). Recent developments in NSW transport negatively impacted, reflected these responses.

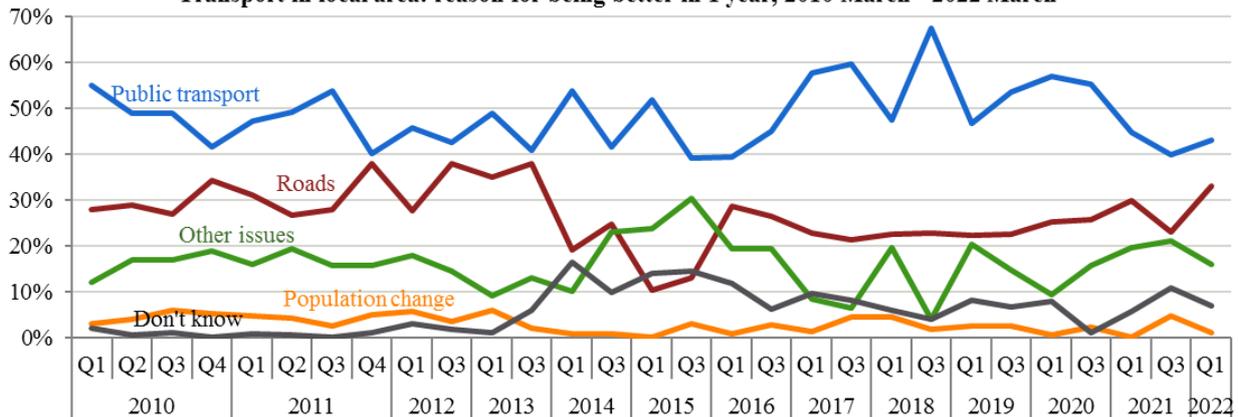
Transport in local area in 1 year time by state, 2010 March - 2022 March



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

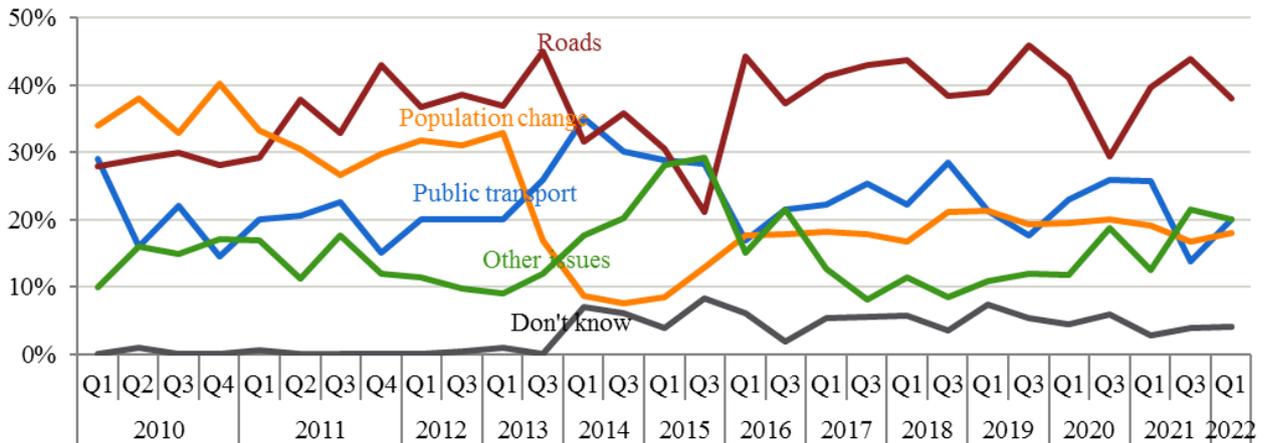
- Public transport and road improvements are still the main reasons Australians believe that transport will improve or worsen in the local areas. Public transport service is the main reason for residents to think that their local transport will be better in one year (top figure) at 43%, while roads are the main reasons for residents to believe that their local transport will be worse (bottom figure) in one year at 38%. Other issues such as cost of living or recent events such as floods are the third leading reason people think their local transport may worsen. Despite the international border being closed due to COVID-19, population growth is still deemed as one of the contributing factors that make traffic worse. Lack of service is the fourth leading reason people think their local transport may decline in one year's time at 18%. Other issues decreased slightly from 22% to 20% from September 2021 for residents to believe that their local transport will worsen in one year.

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



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 March



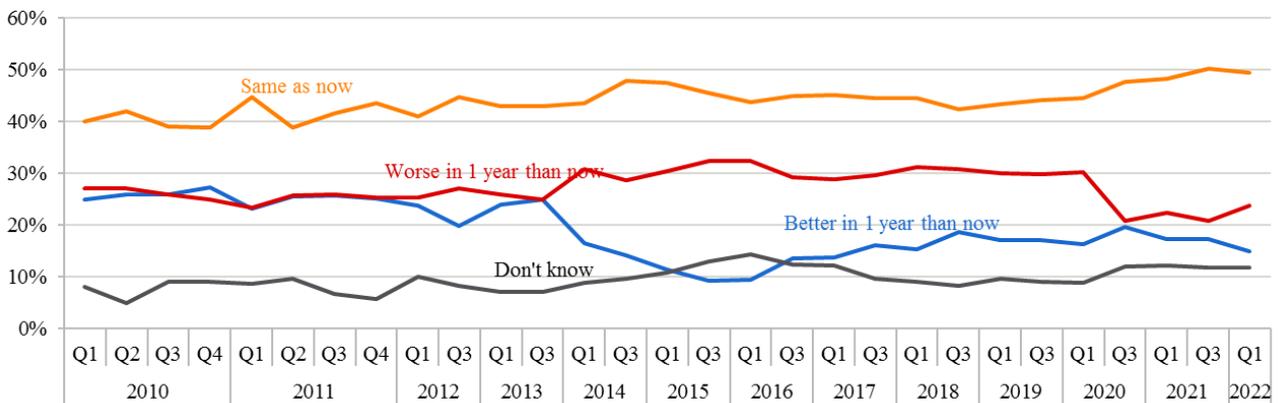
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, lockdowns, health, border closure and issues not included in public transport, road and population change categories.

Confidence about transport in Australia becomes worse 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?

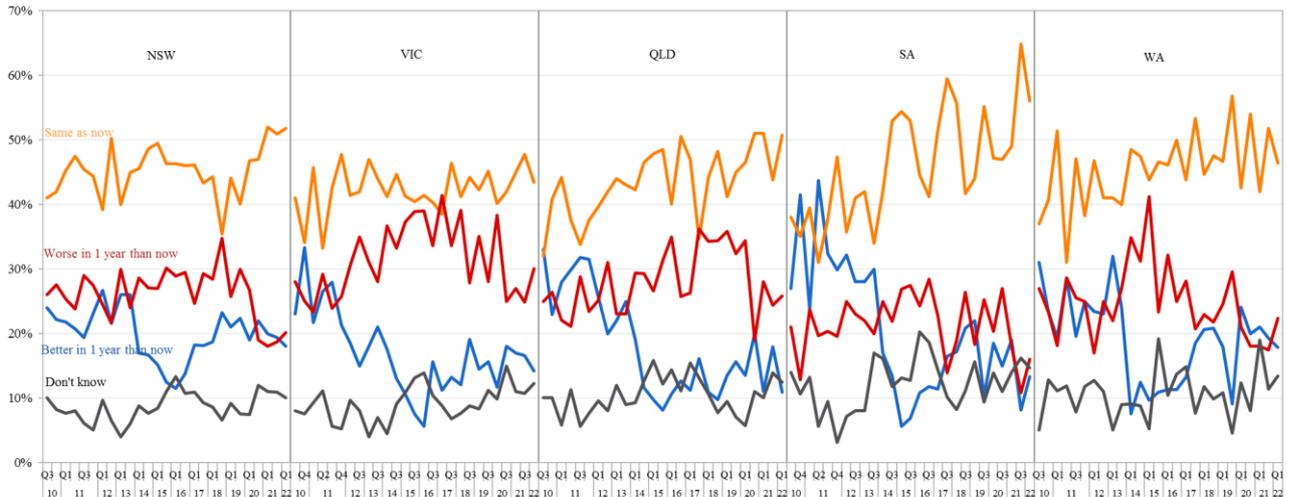
- In March 2022, 49% of Australians said that the state of transport in Australia in one year will be the same as now, with 15% of Australians saying that transport in Australia will be better in one year's time, down slightly from September 2021 from 50% and 17% respectively. In contrast, 24% of Australian said that the state of transport in Australia in one year's time would get worse (up from 21% in September 2021).

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



- In March 2022, about 11% of QLD residents said that the state of transport in Australia would worsen in one year, down from 18% in September 2021. In contrast, 51% of QLD residents said that the state of transport in Australia would be the same in one year, up from 44% in March 2021. In NSW, the percentages of people identifying the state of transport will be better, or the same, remain close to that in September 2021. In VIC, the percentage of people recognising the state of transport will be better or the same have decreased by 3% and 5% respectively from September 2021. SA is the only state where the percentage of residents who believe transport in Australia will become better has increased, from 8% in September March to 13%. In WA, there has been a decrease in the percentage of residents who believe the state of transport in Australia will become better or be the same in one year, by 1% and 6% from September 2021, respectively.

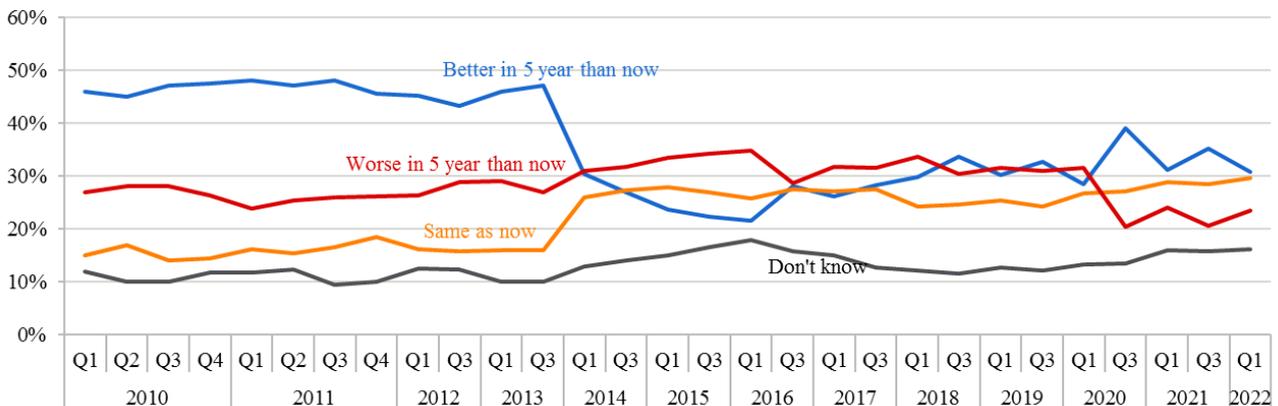
Transport in Australia in 1 year time by state, 2010 March - 2022 March



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?

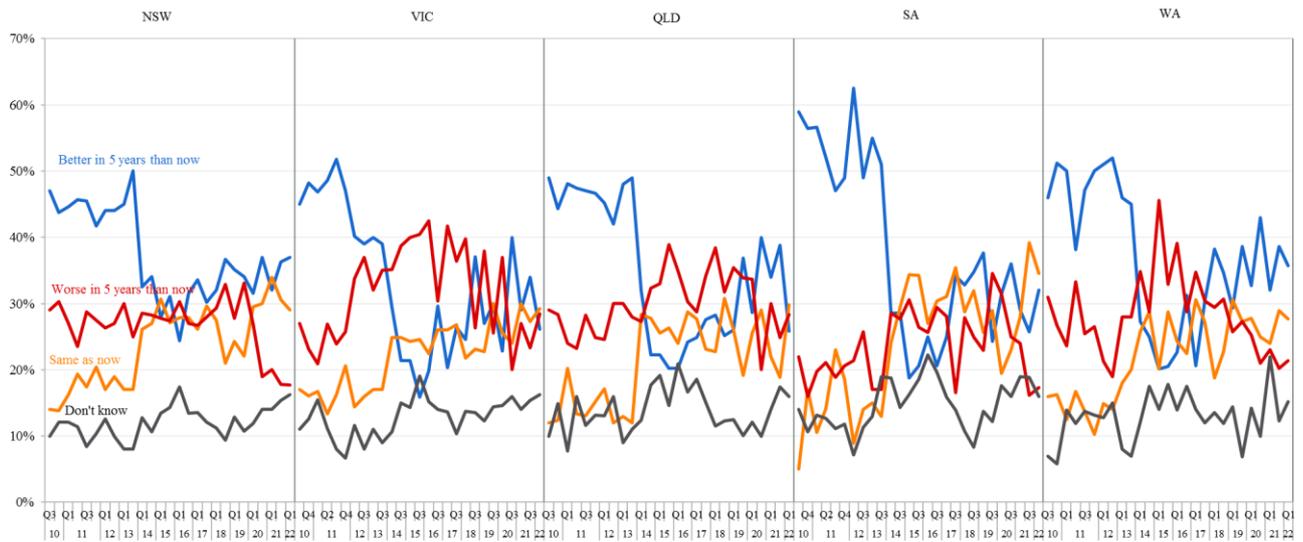
- Australians are less confident that the state of transport will be better in five years' time than it is now. In March 2022, 31% of Australian residents believed transport in Australia would be better in five years' time, down from 35% in September 2021. People think that the state of transport in Australia will worsen in five years, increasing to 23% compared to 21% in September 2021.

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



- Australians across all states are gaining less long-term confidence about transport, especially in QLD. In March 2022, the proportions of Australian residents in every state except SA and NSW who believe Australia's transport will worsen in five years has increased, 5% more in VIC, 3% more in QLD, and 1% more in WA compared to September 2021. SA residents believe that the state of transport in Australia in five years time will be better at 32%, up from 26% in September 2021. There is a slight increase in NSW for those who think the state of transport will be better (by 1%), but the percentage of those who believe transport will remain the same has decreased by 2%. The pessimistic views held by QLD residents may be closely related to the severe floods during the survey period, which damaged roads and public transport infrastructure and many properties.

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



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.

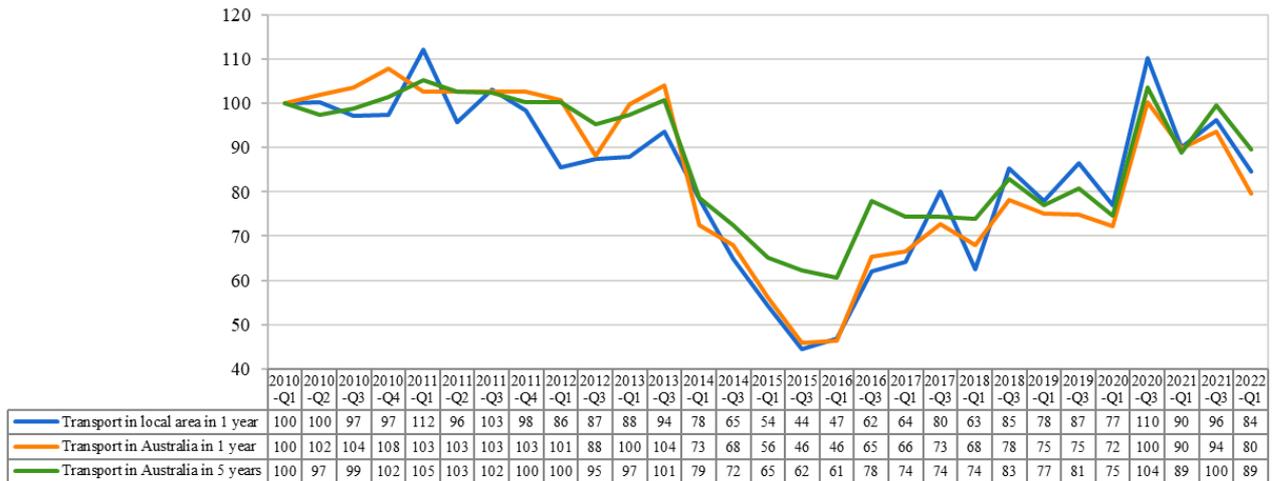
A TOPS Index value of more than 100 means that Australians' confidence about the state of transport getting better is more substantial relative to March 2010. A TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

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

- Australians have become less confident about improvements in transport in their local area in one year's time (also less confident compared to September 2021).
- Australians have become less confident about improvements in Australia's transport improvements in one year's time (also less confident compared to September 2021).
- Australians have an equal level of confidence about improvements in transport in Australia in five years' time compared to March 2021 but less confident compared to September 2021.

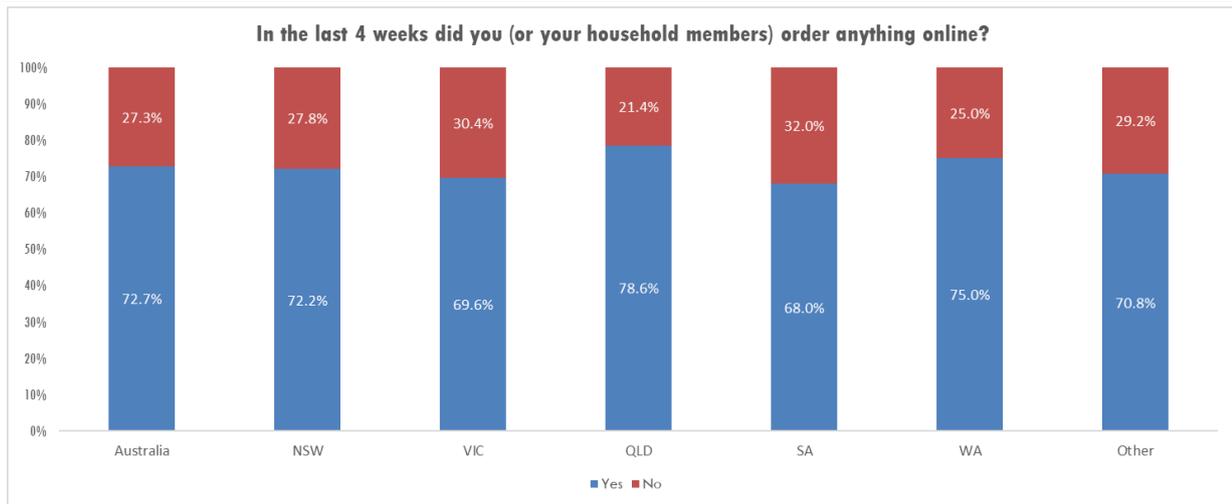
Compared to the launch of TOPS in March 2010, Australians are less confident about improvements in transport in their local area in March 2022 (Confidence index: from 100 to 84) and in Australia in the next year (Confidence index: from 100 to 80) and are less confident about improvements in transport in Australia in five years' time (Confidence index: from 100 to 89). There has been a sharp decrease in confidence since September 2021, but confidence is improved compared to the start of the pandemic in March 2020, showing improvement confidence for future improvements remains but has dropped due to many events that occurred in recent months, including 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 for some of these events, such as flood damages and increased cost of living, will continue to impact transport in the following months.

ITLS TOPS Index of Transport Confidence

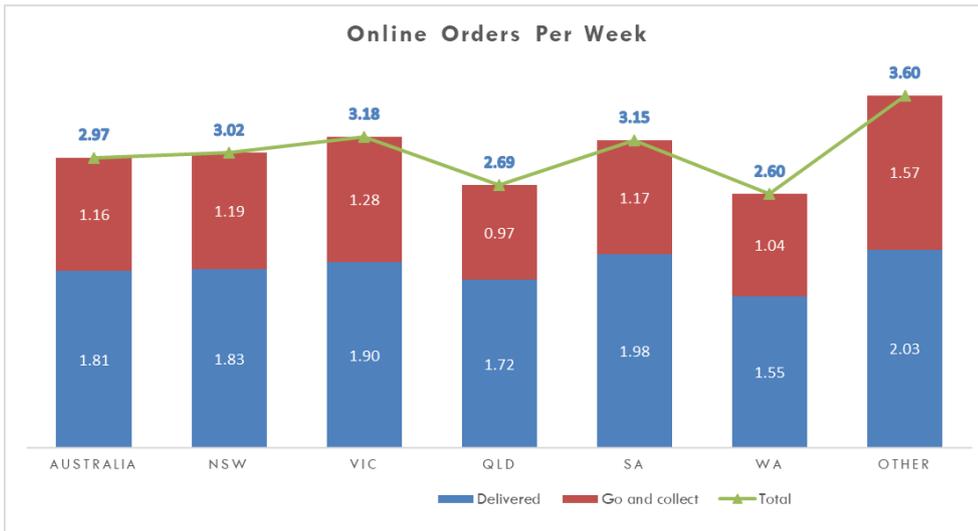


Supplementary questions in March 2022
Online shopping, delivery and collecting

– Nearly three quarters (73%) of Australians shopped online last month, with an average of about three orders per week.

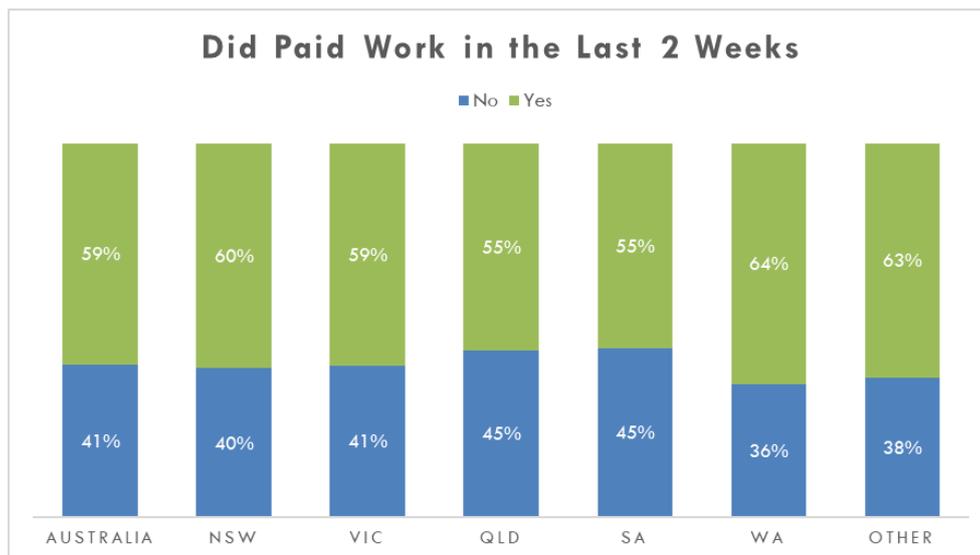


About 1.81 orders are delivered, while the balance (1.16 orders) was click-and-collect. Victorians and South Australians placed more online orders, with an average of 3.18 and 3.15 orders per week, respectively. By contrast, Queenslanders and Western Australians placed less orders, with a weekly average of 2.69 and 2.60, respectively. People in New South Wales placed 3.02 orders, slightly higher than the average of 2.97 orders.



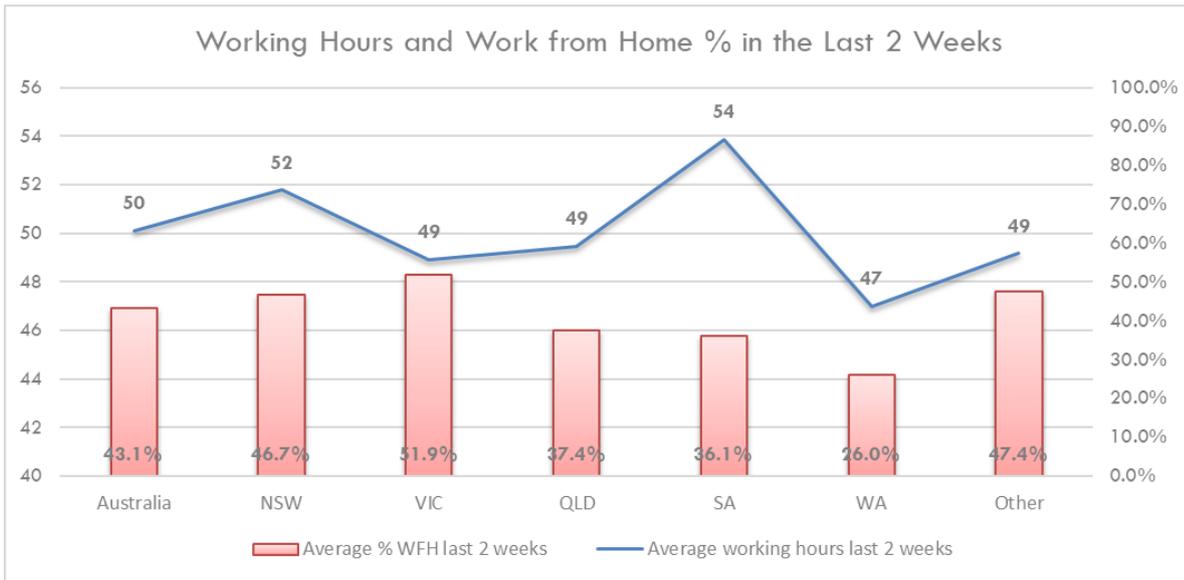
Working from home

We asked respondents about the number of hours they worked and were paid in the last two weeks. We used two weeks as the duration to allow for flexibility given the working hours fluctuation for different types of employment arrangements such as part time, casual, contract, and doing multiple jobs. 59% of Australians have undertaken paid work during the last two weeks.

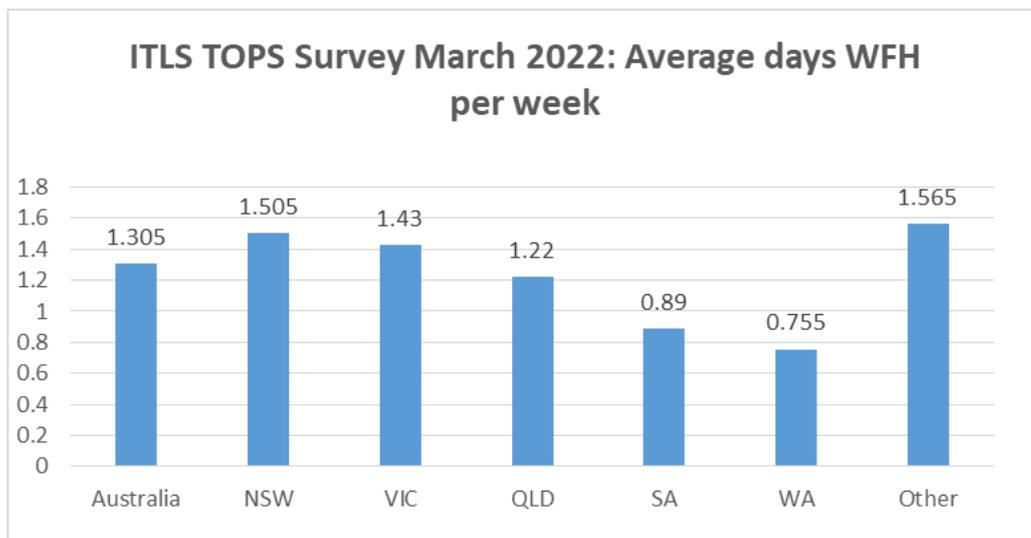


Working Australians undertook on average 50 hours of paid work during the last two weeks, with 43% of the working hours working from home (WFH). Workers in SA and NSW had the longest working hours at 54 and 52 hours. According to ABS source based on working hours per job², the seasonal adjusted quarterly working hours per job in Australia across all industries and all job types is between 366 to 372 hours per job in 2021, which is equivalent to about 28 hours per week. The average working hours in the survey for Australia and for the main states are close, just slightly below the average hours from ABS. The WFH proportion is the highest in Victoria at 52%, followed by 47.4% in other states including ACT/TAS/NT and 46.7% in NSW.

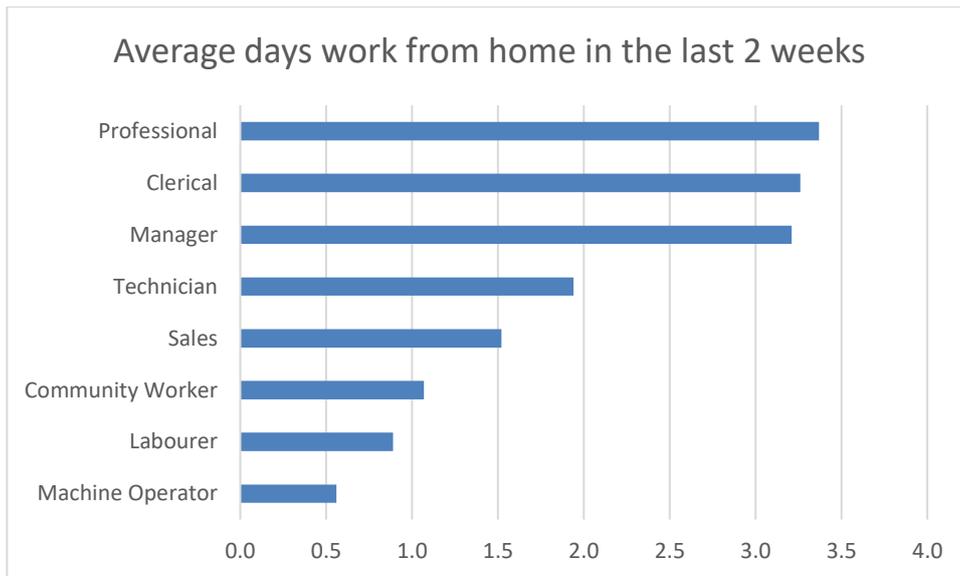
² <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-account-australia/latest-release>



After two years working from home due to the pandemic, many Australians have established a new working pattern that involves a day or two working from home (WFH). We asked working people to nominate the number of working from home (WFH) days in the last two weeks. Their responses align closely with the results of working hours multiplied by WFH %. Australians spent 2.61 days WFH in the previous two weeks (or 1.3 days per week). NSW and Victorian workers work more from home, with an average of 1.50 and 1.43 days per week as of March 2022. The higher proportion of WFH in these two states may link to several factors including high daily COVID cases, heavy rainfall and flooding in NSW, the disruption to public transport services in NSW and the higher proportion of professionals, clericals, and managers in these states where WFH makes more sense.



Among all occupations, professionals, clerical, and managers work most from home. Those who work less from home include machine operators, community workers, sales, and technicians.



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

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>

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