

# Transport Opinion Survey (TOPS)

March 2024

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

## About the Transport Opinion Survey

The Transport Opinion Survey is a biannual survey (quarterly from 2010) of about 1,000 adults aged 18 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 March 2024 survey was conducted between the 1<sup>st</sup> and 10<sup>th</sup> of March 2024. This report is based on the data from 1,030 completed responses.

# Highlights

**Note:** This survey was conducted from March 1<sup>st</sup> to March 10<sup>th</sup>, 2024. Public confidence in transport has declined since September 2023 but is still higher than the confidence level recorded in March 2023, which was the lowest since 2018. The near-term and long-term transport confidence for both local areas and Australia have all decreased by over 5%. According to the comments made by Australians, the main issues for transport focus on road congestion and the increasing pressure on the road system with population change and increasing vehicles. The public is still experiencing a high cost of living and a housing shortage. There is a noticeable increase of concern about law and order, as well as security and terrorism, possibly caused by the impact of international conflicts on domestic communities. On the positive feedback, the public has noticed improvements in public transport, road, and infrastructure projects. However, the issues with infrastructure damage, poor roads, and increasing congestion are still the most significant concerns that cause some Australians to think that transport will worsen in one year. Despite the high cost of living, online shopping spending has increased in dollars. There is an ongoing trend of online spending increase since 2022. In a typical week, people spend an average of 28% of working hours working from home (WFH) or from locations other than their main workplaces. The proportion of WFH hours remains on average at 22%, almost the same as September 2023. Professionals, community workers, and salespeople have increased WFH hours, but managers have reduced them. During each weekday, on average, about 62% of workers work in the main workplaces, 27% work from home, and 11% work at both locations. Close to 50% of all commuting travel begins outside of the traditional peak periods, in part linked to the blended nature of daily work, with some occurring at home and some at the main office. 4% of Australians own or have ordered an electric vehicle (EV), with 9% thinking of ordering an EV in the next 12 months. About 33% of Australian households own at least one personal mobility device, such as a bicycle, scooter, e-bike, or e-scooter.

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

- In September 2023, 51% and 41% of Australians nominated housing and economy/employment as the top two priorities. In March 2024, these two areas still hold the top two spots, but housing has decreased slightly, remaining historically high. There is no ease in the housing situation. It is a growing severe problem influencing more Australians, especially young Australians. The concern about the economy and employment has remained at the same level as the last quarter in 2023, reflecting the circumstances in recent months with RBA's decision to place a hold on the cash interest rate. However, people are still under pressure due to the high cost of living.

## Public transport and road improvements are the top priorities for transport

- In September 2023, 30% of Australians said that public transport improvement is the highest priority issue for transport in Australia. This has remained at 30% in March 2024. About 27% of Australians said road improvement is the top priority, up from 24% in September 2023. This is followed by economic and financial problems at 20%, at about the same level in September 2023.

## Opinions on transport in local areas have dropped since September 2023

- In March 2024, 29% of Australians said that transport in their local areas was worse than one year ago, slightly higher than 28% in September 2023. In contrast, 9% of Australians said that transport in their local area is better than one year ago, down from 11% in September 2023. People with neutral or no opinions remain at 62%, identical to September 2023.

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

- In March 2024, 15% of Australians said that transport in their local area would be better in one year, identical to September 2023. In contrast, 27% of Australians said that transport in their local area would worsen in one year, up from 24% in September 2023.

### **Australians have less confidence in transport in Australia in the short term**

- In March 2024, 15% of Australians thought that transport in Australia would improve in one year, down from 17% in September 2023. Furthermore, 29% of Australians believed that transport in Australia would worsen in one year, up from 27% in September 2023.

### **Australians have less confidence about transport in Australia in the longer term**

- In March 2024, 33% of Australians thought that transport in Australia would improve in five years, down from 36% in September 2023. Furthermore, 31% of Australians believed that transport in Australia would worsen in five years, up from 27% in September 2023. People with neutral or no opinions have decreased from 37% in September 2023 to 36% in March 2024.

### **ITLS Index of Transport Confidence**

- Compared to September 2023, in March 2024, Australians are less confident about transport in their local area (Confidence index: down from 85 to 77). The same applies to transport across Australia in one year (Confidence index: down from 81 to 72) and in five years (Confidence index: down from 90 to 81). Overall, all indexes have decreased significantly compared to September 2023. However, the confidence levels for the previously mentioned measures are still higher than those recorded in March 2023.

### **About 77% of Australians ordered online in the last four weeks**

- About 77% of Australians made online order(s) in the previous four weeks, about the same as in September 2023. For those who ordered online, the average spending of \$413 in the last four weeks is higher than \$395 in September 2023. They spent 52% on groceries, clothing & apparel (more than 50% in September 2023). Among the 77% of Australians who made online order(s) in the last four weeks, about 33% of total grocery spending was made online, a decrease from 36% in September 2023, with the remaining 67% of expenditures made in stores.

### **Working people spend 28% of their work time working from home (WFH) for other locations**

- About 67% of Australians have undertaken paid work in the last two weeks, down from 69% in September 2023. In a typical week, working people spend an average of 38 hours working, with 27.4 hours spent in their main workplaces (72%), 8.2 hours from home (21.5%) and 2.5 hours from elsewhere (6.6%). During each weekday, on average, about 62% of workers work in the main workplaces, 27% work from home, and 11% work at both locations. Of all the working hours, 22% are WFH hours, about the same as in September 2023. WFH proportions have increased in VIC, QLD, and SA but slightly decreased in NSW and WA. Professionals, community workers, and salespeople have increased WFH hours, but managers have reduced them. The pattern of how people arrange their work hours is more similar from Monday to Friday in the national data. A more apparent pattern in the Greater Sydney Metropolitan Area (GSMA) suggests how people may arrange their work time. At the beginning and the end of the week, more people work from home only, with Friday at 28% and Monday at 25%. In contrast, mid-week days, including Wednesday (68%), Tuesday (67%), and Thursday (65%), have the highest levels of people working from the main workplace only. Monday (13%) and Tuesday (12%) are the days with more people working hybrid at both places. The highest level of peak-hour commuting occurs on Tuesdays (67%). Towards the weekend, on Thursday (53%) and Friday (50%), only about half of the commuters depart for work during peak hours. About 39% of employers have stipulated that workers must return to the office a particular number of days a week. About 7% of the workforce are polyworkers doing more than

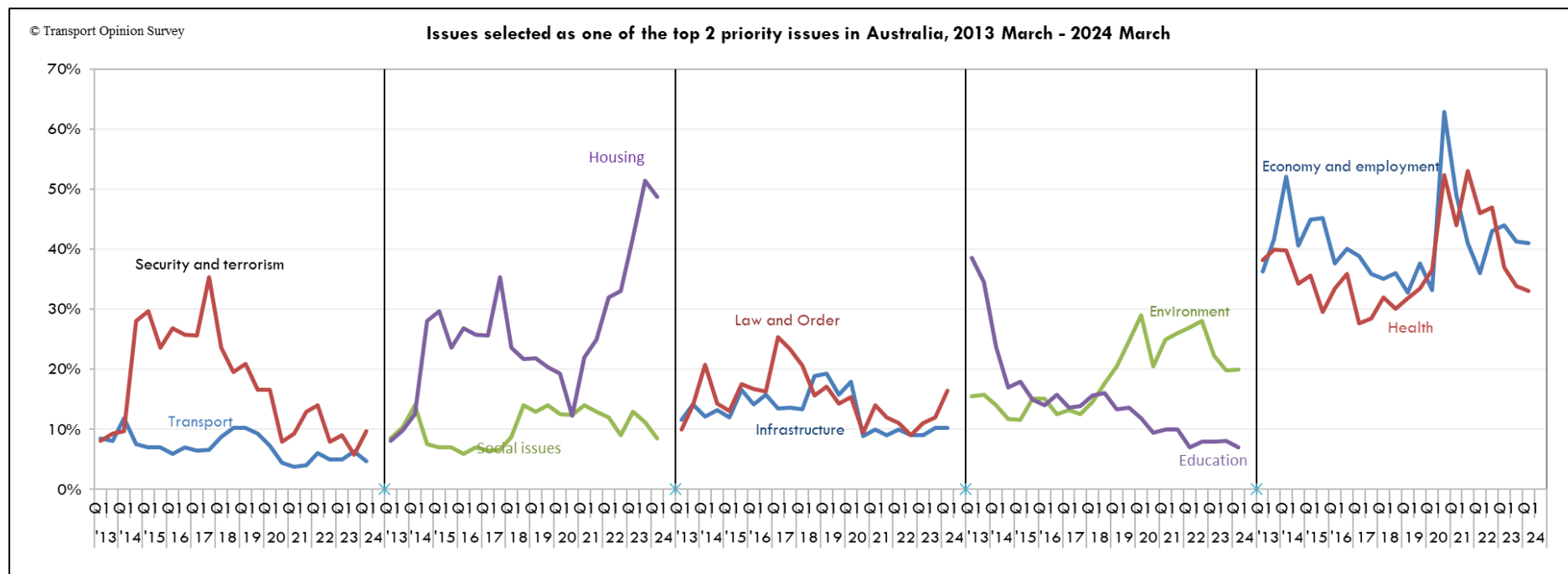
one job. Car use is the most prominent mode of commuting at 63.3%, followed by using public transport at 26.3%, and using active modes such as walking and cycling at 8.3%.

- About 4% of Australians own or have ordered an electric vehicle (EV), with 9% thinking of ordering an EV in the next 12 months. About 33% of Australian households own at least one personal mobility device, such as a bicycle, scooter, e-bike, or e-scooter.

## Transport as a national priority

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

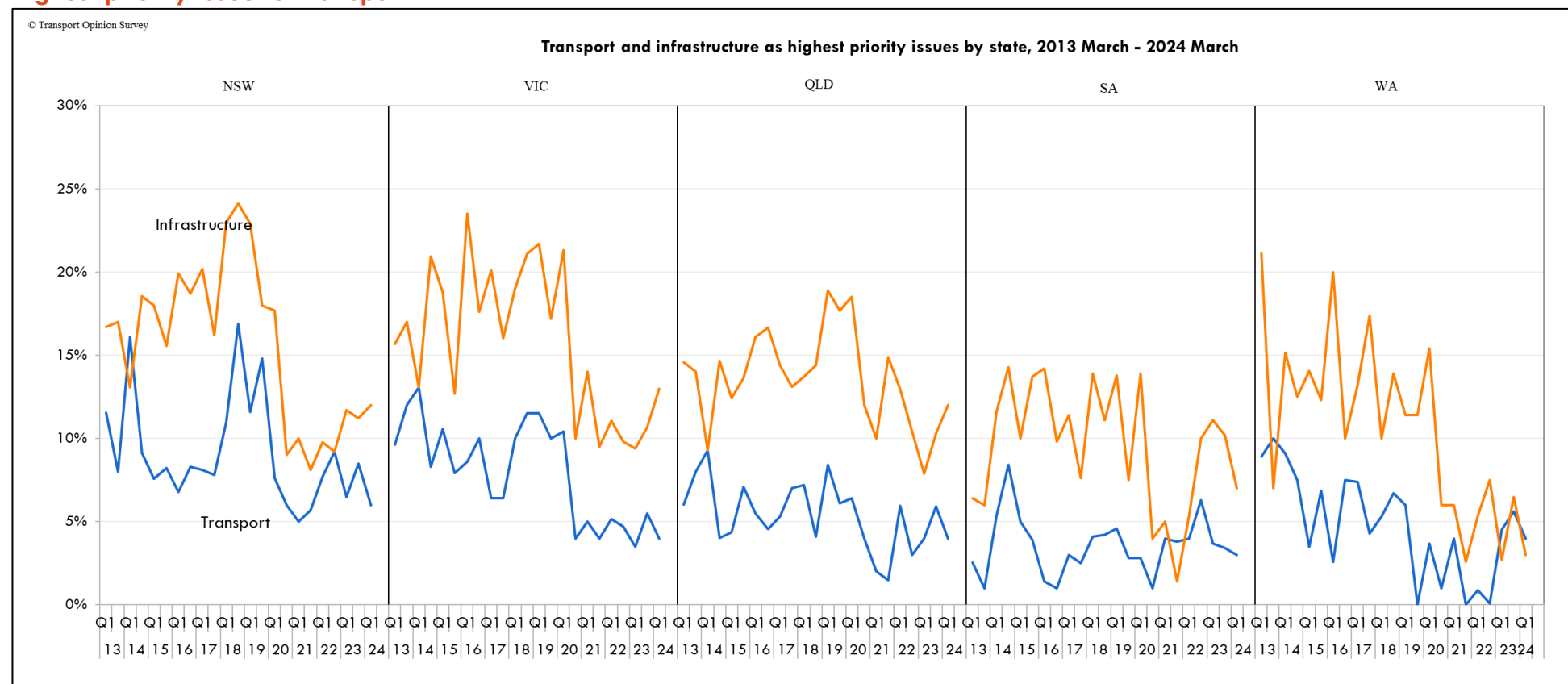
- People's opinions on national priorities reflect public concerns about the housing crisis. Housing remains the top priority, with 49% of Australians selecting it as the top priority. The pressure from the high cost of living, including food, energy, fuel, and other items, remains strong. Economy and employment (41%) is the 2<sup>nd</sup> top priority, identical to September 2023. These two priorities haven't risen further since September 2023, primarily due to the international conflicts after September 2023, impacting the domestic communities and causing concerns in both government and the public on law and order, as well as security and terrorism. Both priorities have increased by about 4% since September 2023. Other priorities that have decreased from the September 2023 survey include transport (down from 6% to 5%), social issues (down from 11% to 8%), health (down from 34% to 33%) and education (down from 8% to 7%). Other priorities, such as environment (20% to 20%) and infrastructure (10% to 10%) have remained identical.
- About 10% of Australians nominated infrastructure, and 5% selected transport as one of Australia's two highest priority issues, slightly down from September 2023.



Note: percentages add up to 200% in each survey wave 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 transport as the top priority exhibits very minor change compared to September 2023, but mainly in the overall decrease instead of other changes. In March 2024, 6% of New South Wales residents selected transport as a priority compared to 4% of Victoria residents, 4% of Queensland residents, 3% of South Australia residents and 4% of Western Australia residents. The percentages of residents of most states nominating infrastructure as the top priority have not changed compared to September 2023. About 12% to 13% of New South Wales, Victoria residents and Queensland residents selected infrastructure as the top priority, reflecting public concerns about infrastructure in their states. On the other hand, South Australia and Western Australia residents have fewer concerns, with only 7% and 3% selecting it as the top priority, respectively.

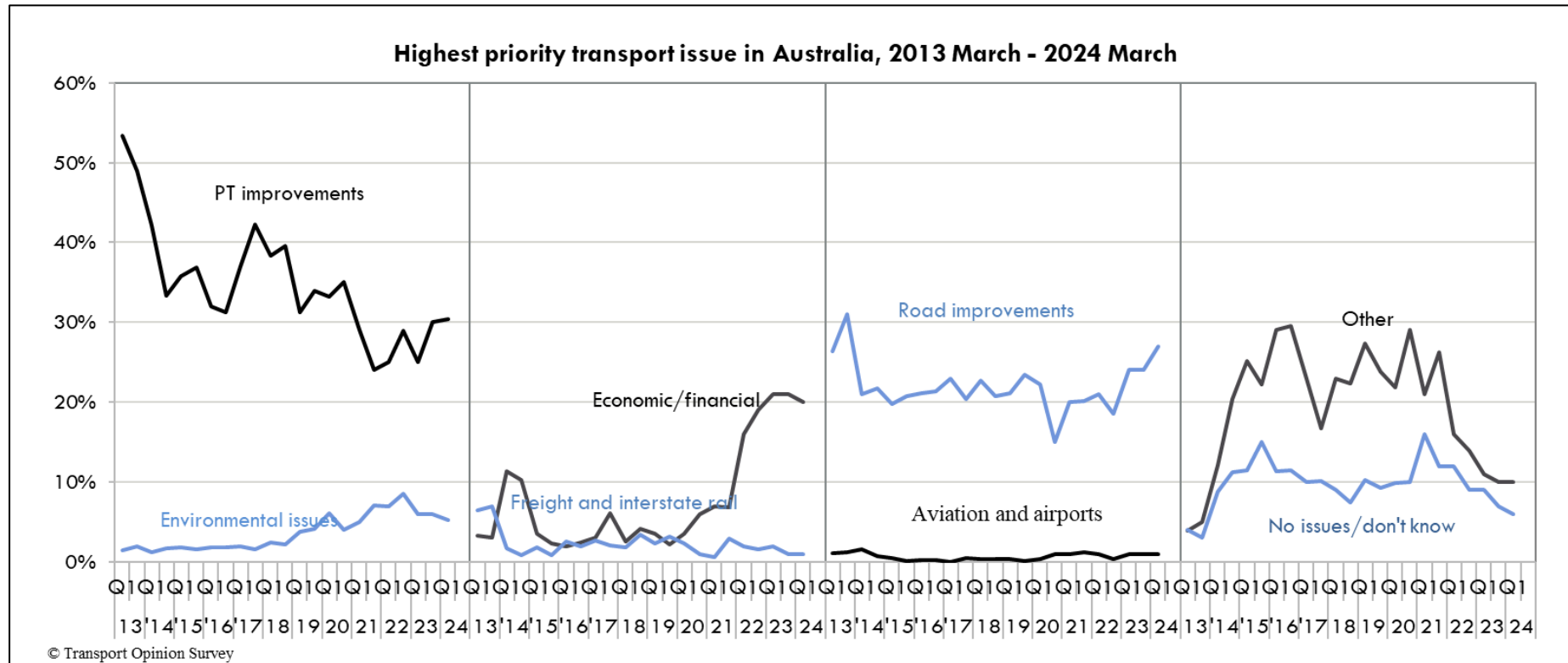
## Highest priority issue for transport



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

- About 20% of Australians said that the highest priority for transport in Australia is economic and financial issues, a slight decrease from 21% in September 2023. However, this priority for transport has remained high. Before March 2022, the level for this priority was typically below 10%. The recent three waves of TOPS in 2023 and 2024 have shown that Australians have felt the impact of higher costs in everyday travel, from fuel prices to public transport fares, under the overall environment of a high cost of living.
- About 27% of Australians said road improvements is the highest priority issue, up from 24% in September 2023. About 30% of Australians said public transport improvement is the top priority, identical to the level in September 2023. For road improvement, many people cited the poor conditions of roads, but more dominantly the impact of heavy congestion and mixed traffic with trucks on the roads. Some have also mentioned there were more cars and trucks on the roads. Public transport improvements are related to public transport service issues and accessibility and connectivity to more areas.

- Individuals nominated a similar amount of various priorities as "other" priorities as of September 2023, with 10% classified as other priorities. Only 5% of Australians selected environmental issues as a top priority for transport, slightly lower than the level in September 2023.

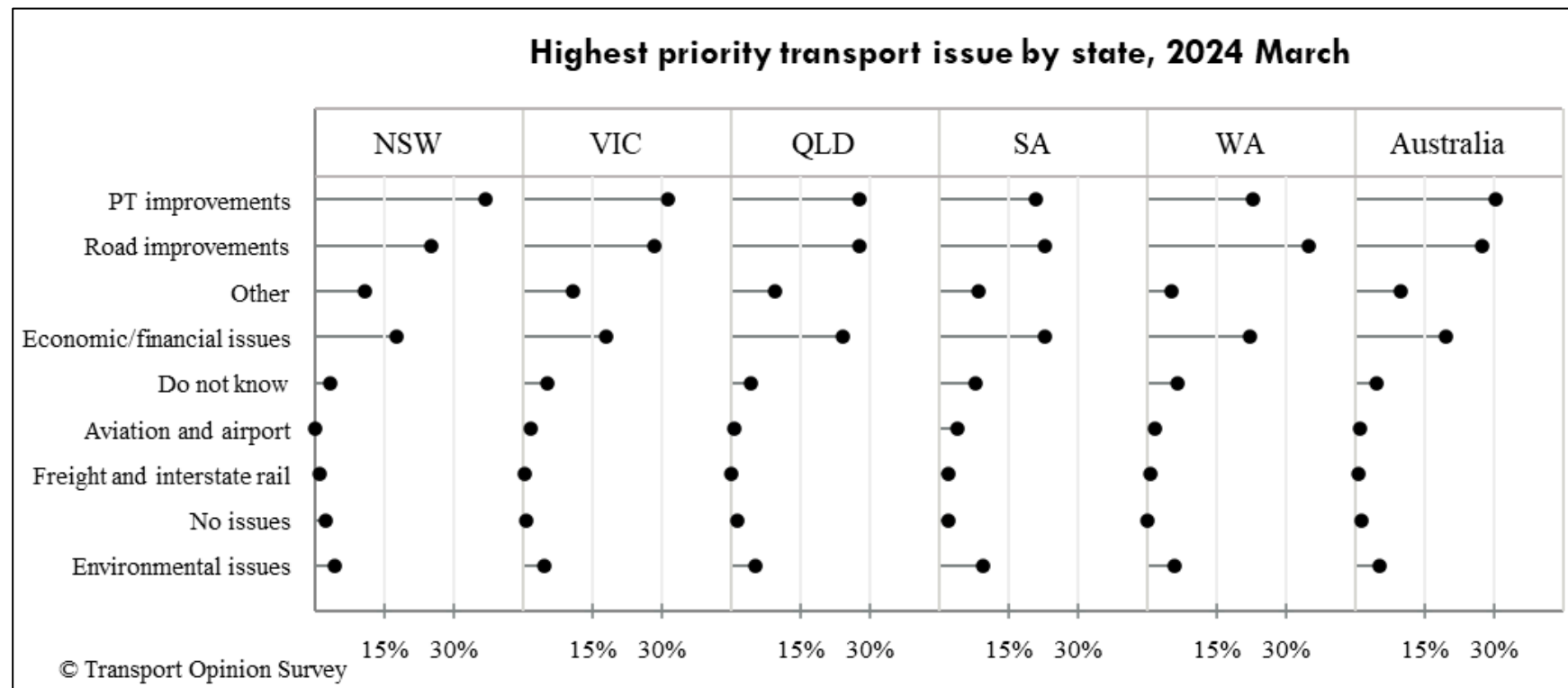


Note: percentages add up to 100% in each quarter. "Other" includes responses about transport in general, responses about both public transport and roads, issues not included in other categories such as lockdown, restrictions, safety, terrorism, and rebuilding transport after disasters.

- In the March 2024 survey, New South Wales residents consider public transport improvements more important than road improvements (37% vs. 25%). The level for public transport improvements is also much higher in NSW than in other states and higher than the national average (37% vs. 30%). South and Western Australians consider road improvements more important than public transport improvements (23% vs. 21% in SA and 35% vs. 23% in WA).
- Victoria residents consider road improvements less critical than public transport improvements (28% vs. 31%). Queensland residents consider road and public transport improvements equally important at 28%.
- Australians in other states and territories consider road improvements more important than public transport improvements (31 vs. 23%).



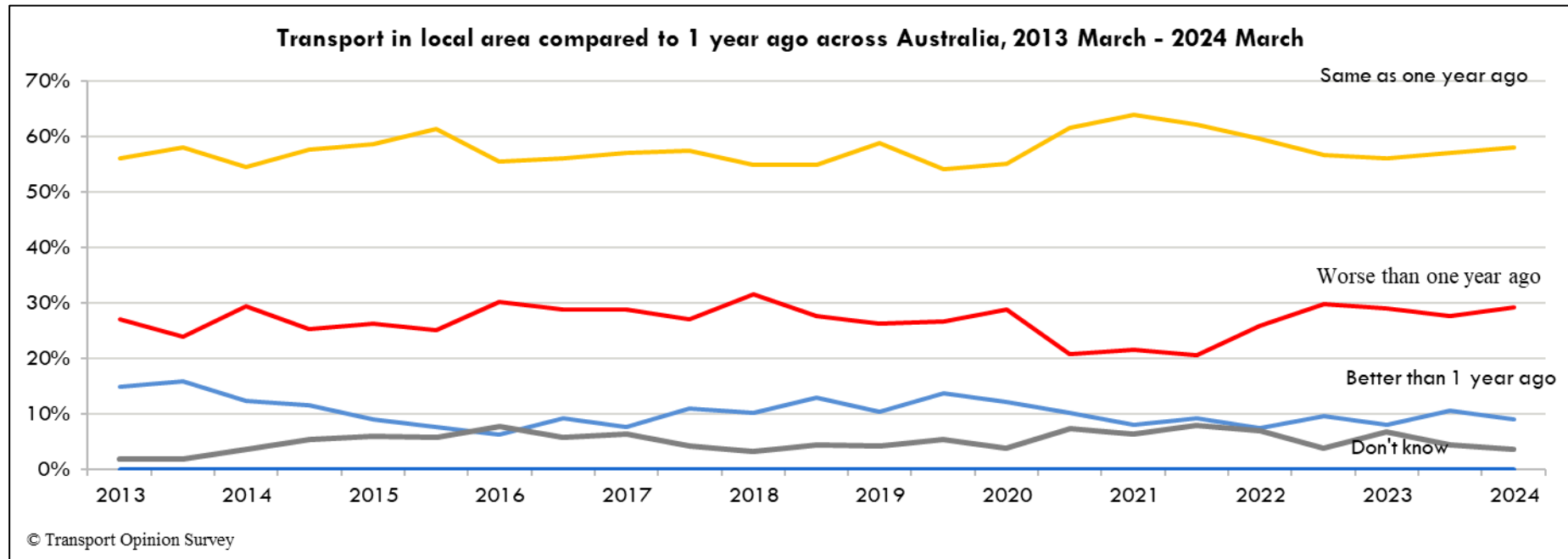
- Many have mentioned public transport service quality, crowdedness, and accessibility and connectivity issues in new areas. The main problems regarding road improvement are primarily related to more severe road congestion due to population growth, number of cars, heavy trucks, driver behaviour on the roads and other reasons. There is also a strong urge from the public to improve the current road infrastructure.
- Economic and financial issues are among the top three priorities in all states and territories. Many have mentioned the soaring costs of petrol. The three most important priorities are public transport improvements, road improvements and economic/financial issues. Australians currently have more focused priority choices for transport.



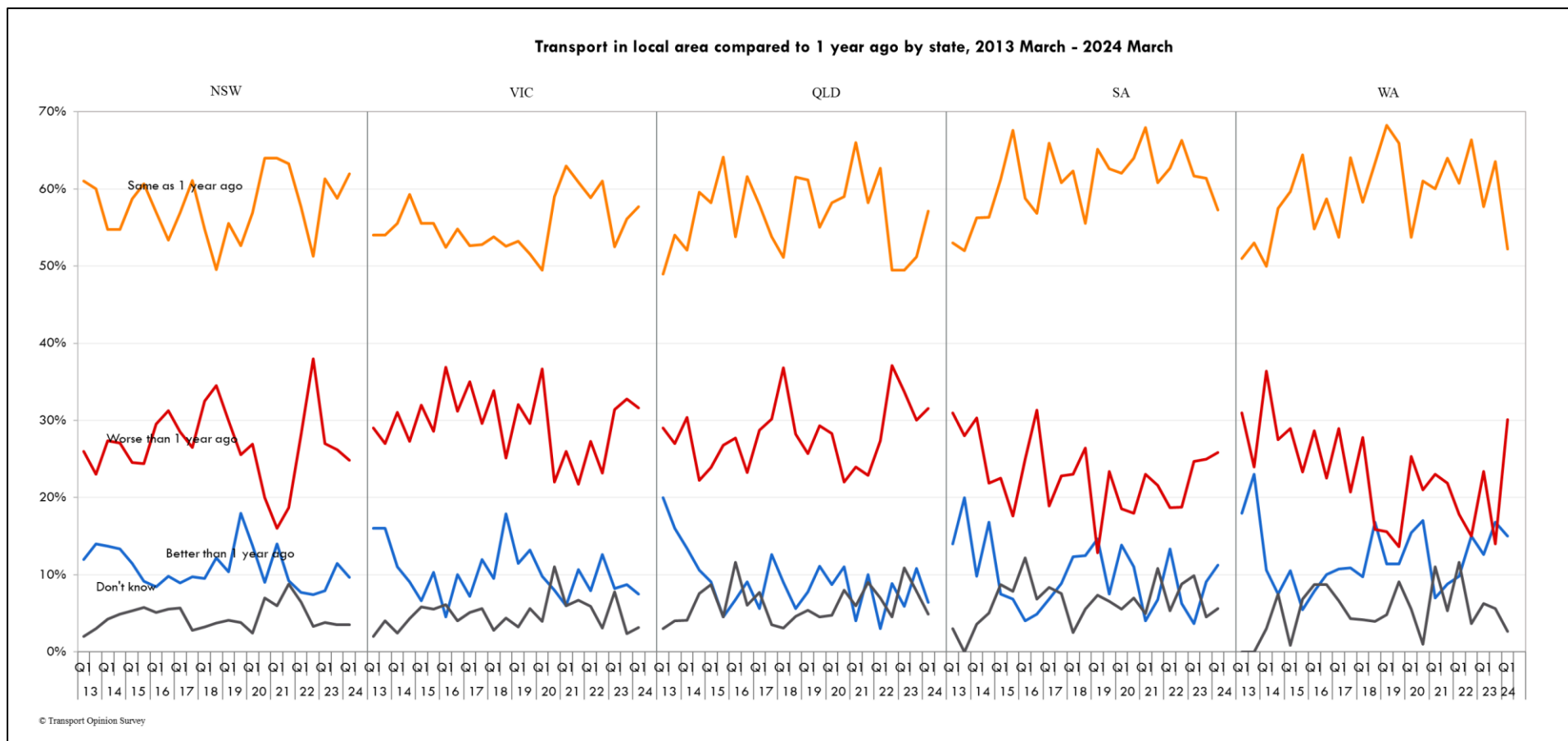
### Local transport differs across states and territories

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 March 2024, 29% of Australians believed that transport in their local area was worse than one year ago (up from 28% in September 2023). About 58% of Australians said it is the same as one year ago (up from 57% in September 2023), and 9% said it is better now than one year ago (down from 11% in September 2023). Those who gave no opinions decreased from 5% in September 2023 to 4%, showing Australians had less certainty in their views on this issue.

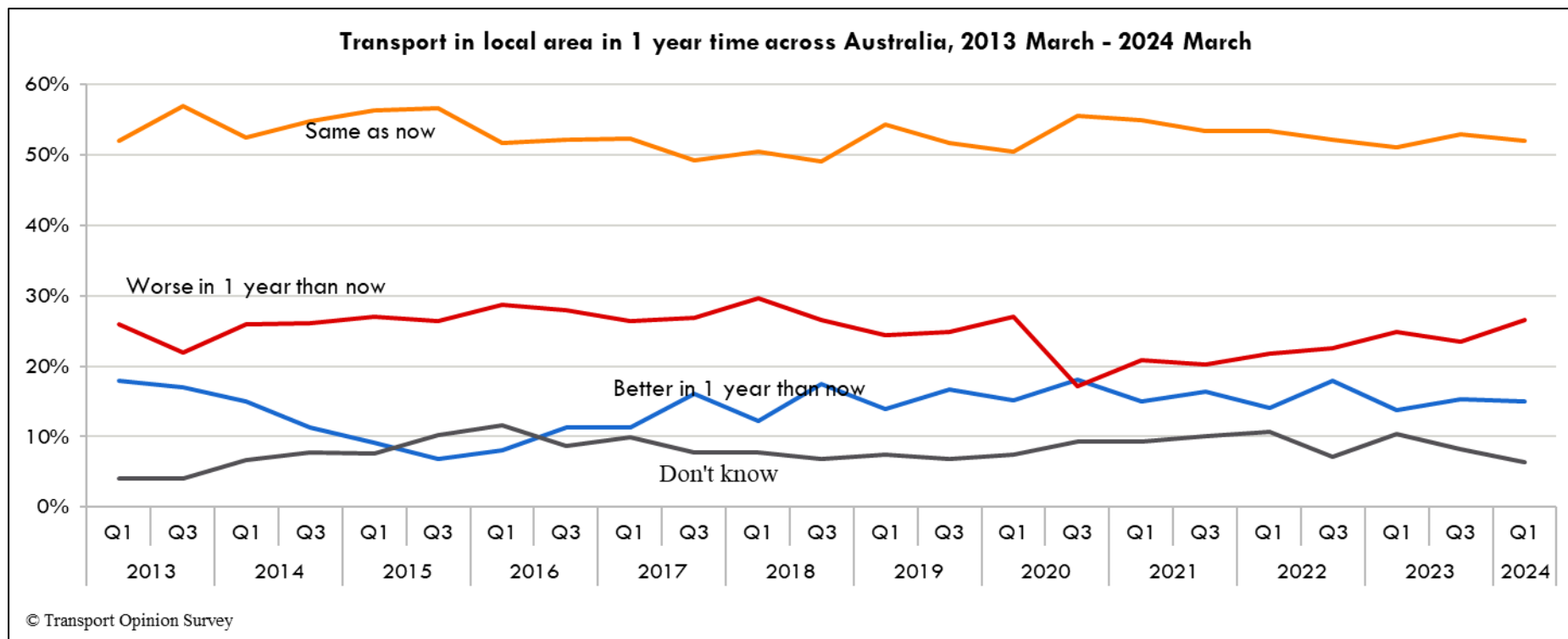


- Respondents' evaluation of transport in the local area is generally consistent across states of Australia, seeing a decreased proportion of people thinking transport in the local area is better than it was one year ago in all states and territories except in SA. However, more people believe the transport in the local area is the same as one year ago.
- In VIC, 66% of respondents believe the state of transport is better or the same, slightly higher than 65% in September 2023. A similar rise in the combined positive and neutral opinions was also observed in NSW and QLD, with a small increase of 2% in both states from September 2023. In WA, the same number is 67%, a 13% decrease from 80% in September 2023. In SA, the combined positive and neutral opinions decreased slightly by 1%.
- However, positive opinions on transport have decreased in every state and territory except SA. This decrease in positive views is especially significant in QLD, with a 5% decrease.



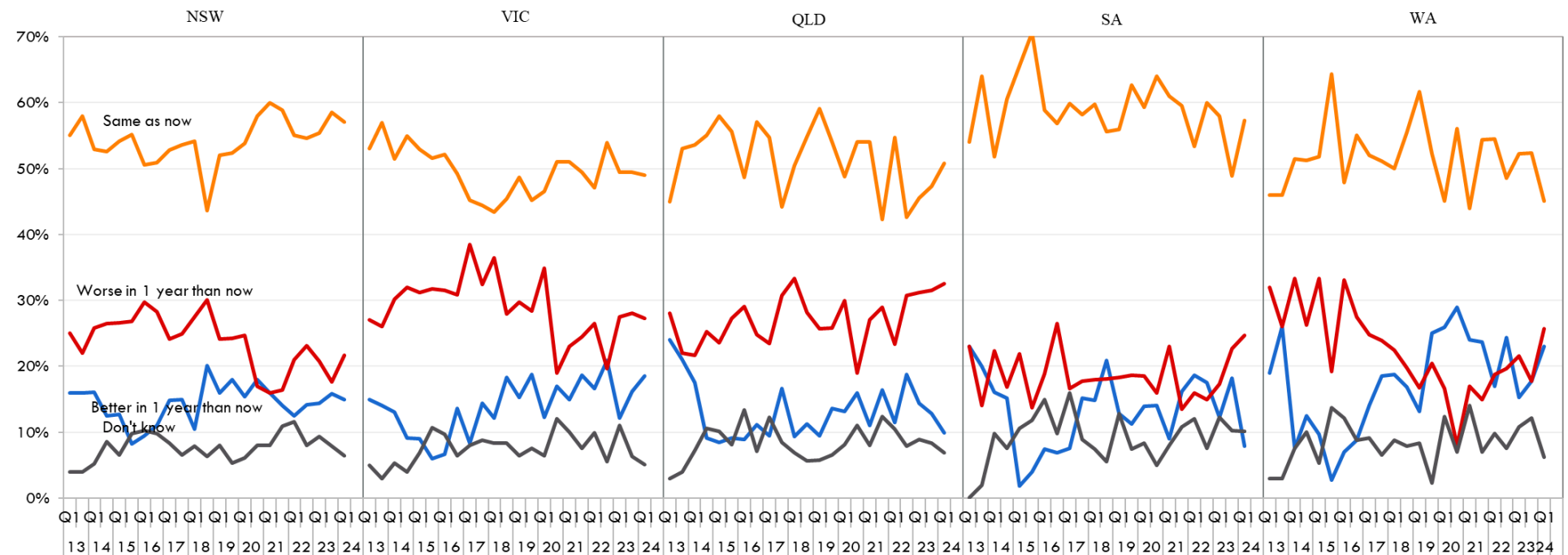
*Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?*

- In September 2023, 52% of Australians said that transport in their local area would be the same in one year. 15% said transport would be better, identical to September 2023. About 27% said transport would be worse, up from 24% in September 2023. About 6% of Australians did not offer their views on this question, down from 8% in March 2023.



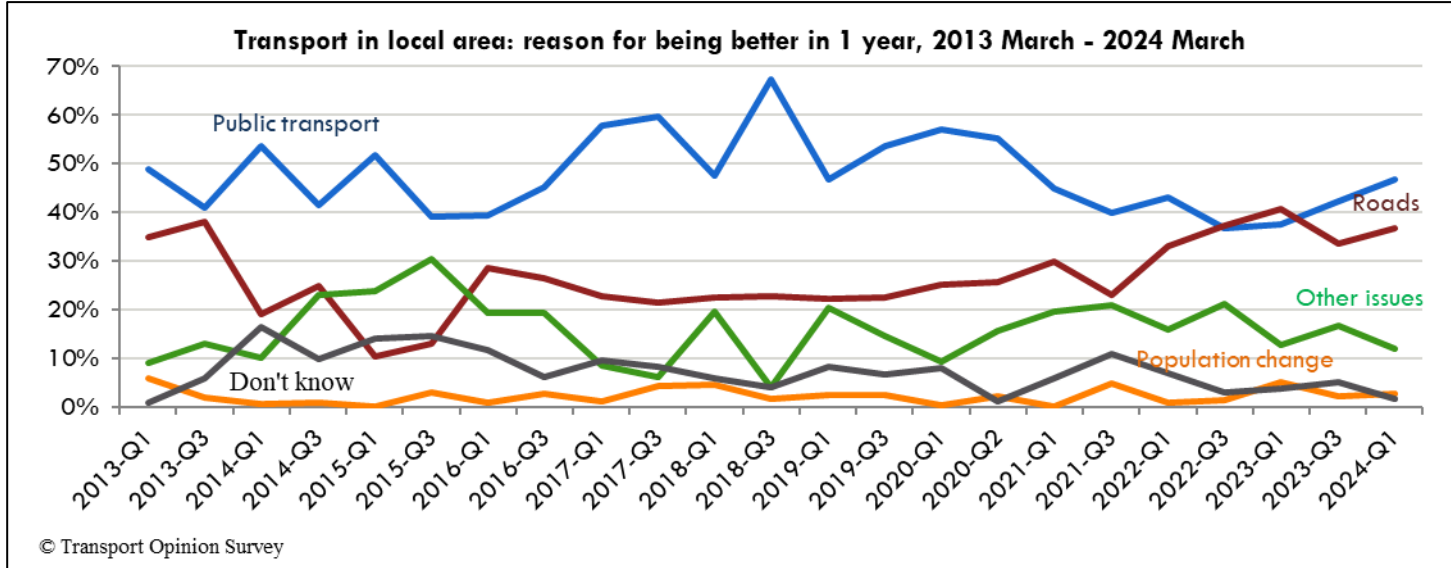
- Australians have responded with a mixture of confidence to transport in their local area in their states in one year, with some states showing a confidence level increase and others showing the opposite. NSW residents who chose "worse" increased from 18% in September 2023 to 22%. VIC residents had shown more confidence, shown by those who chose "better", increased from 16% in September 2023 to 19%. QLD has demonstrated a decrease in confidence, with those who chose "better" decreasing from 13% in September 2023 to 10%. The most significant decline in confidence occurred in SA, with people who chose "better" decreasing from 18% in September to 8% now. More people also chose "worse" in SA (25%, up from 23%). In WA, both groups who chose "better" (+5%) and "worse" (+8%) have increased compared to September 2023, showing there is a conflict view, which may be due to the transport conditions in their respective areas.

## Transport in local area in 1 year time by state, 2013 March - 2024 March

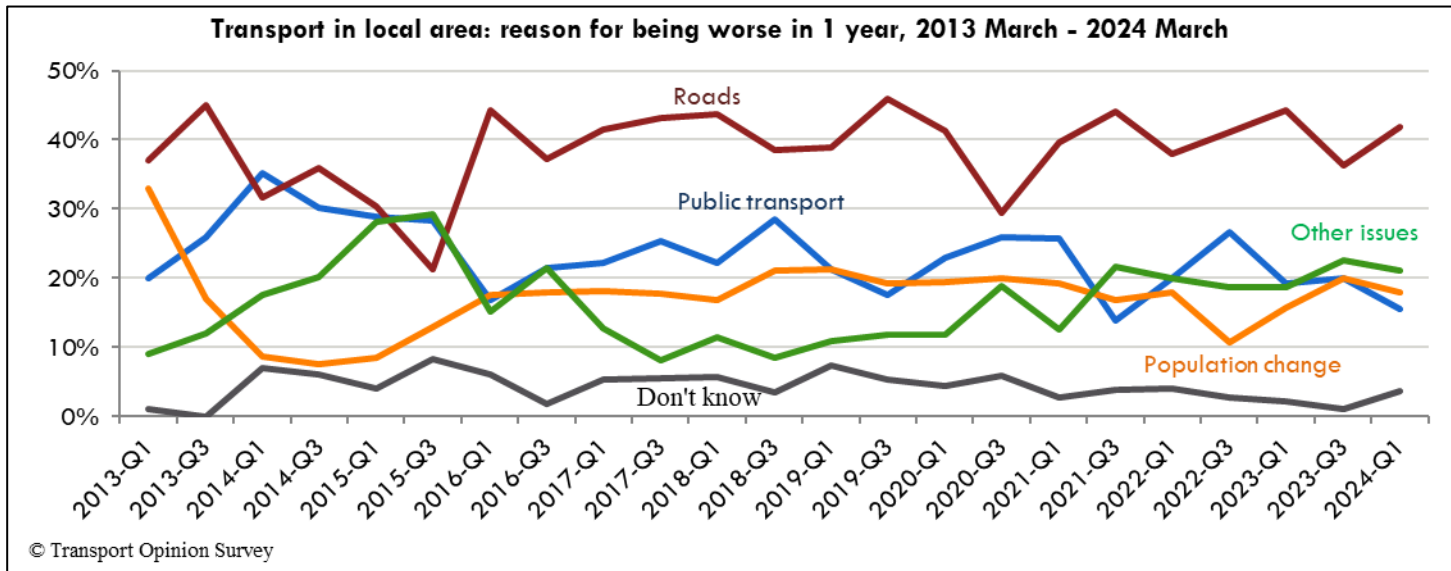


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- The main reasons Australians believe that transport will improve or worsen in their local area are public transport and road improvements. Public transport services and roads are the main reasons residents think their local transport will improve in one year, at 47% and 37% respectively. Roads are the most prominent reason residents believe that their local transport will worsen in one year's time at 42%, up from 36% in September 2023. People mentioned congestion, poor road conditions, trucks on roads, and road safety issues as the main reasons why they believed that transport in their local area would worsen in one year. Other issues such as cost of living and fuel price are the second reason people thought their local transport would be worse. Population change and public transport are the third and fourth reasons among those who believe that transport will worsen in local areas in one year.



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.

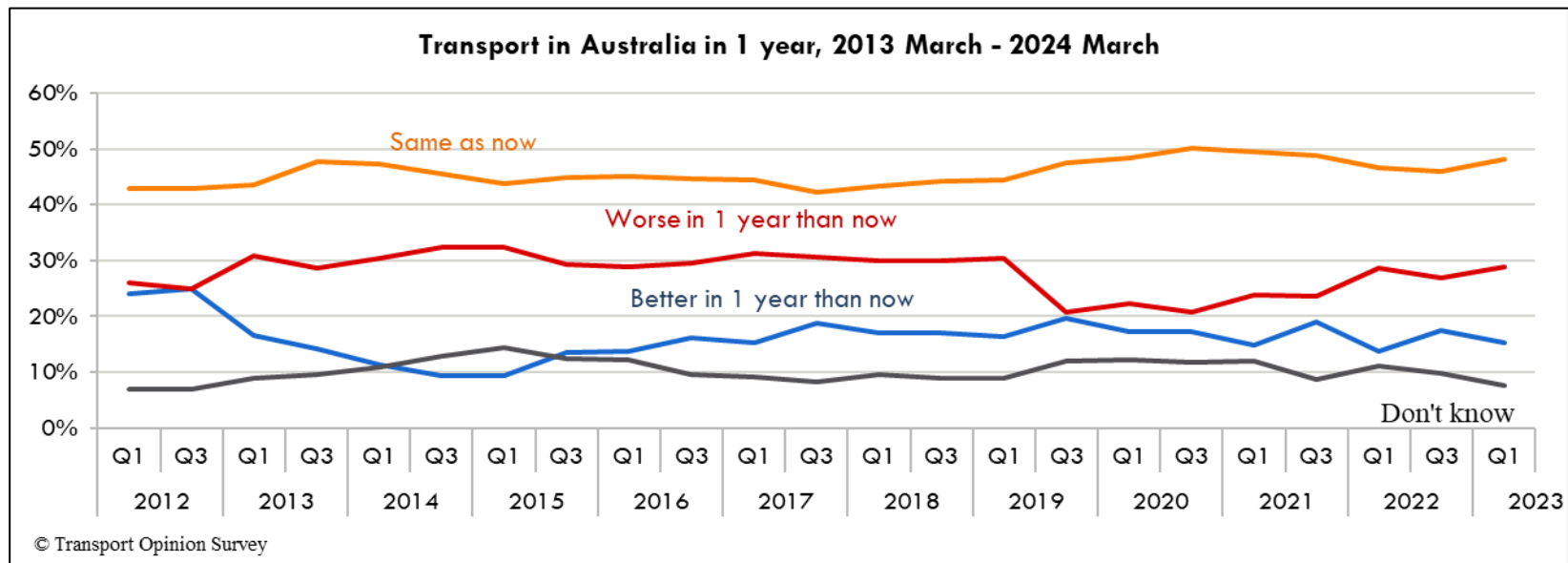


Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

## Confidence about transport in Australia has decreased in both short-term and long-term

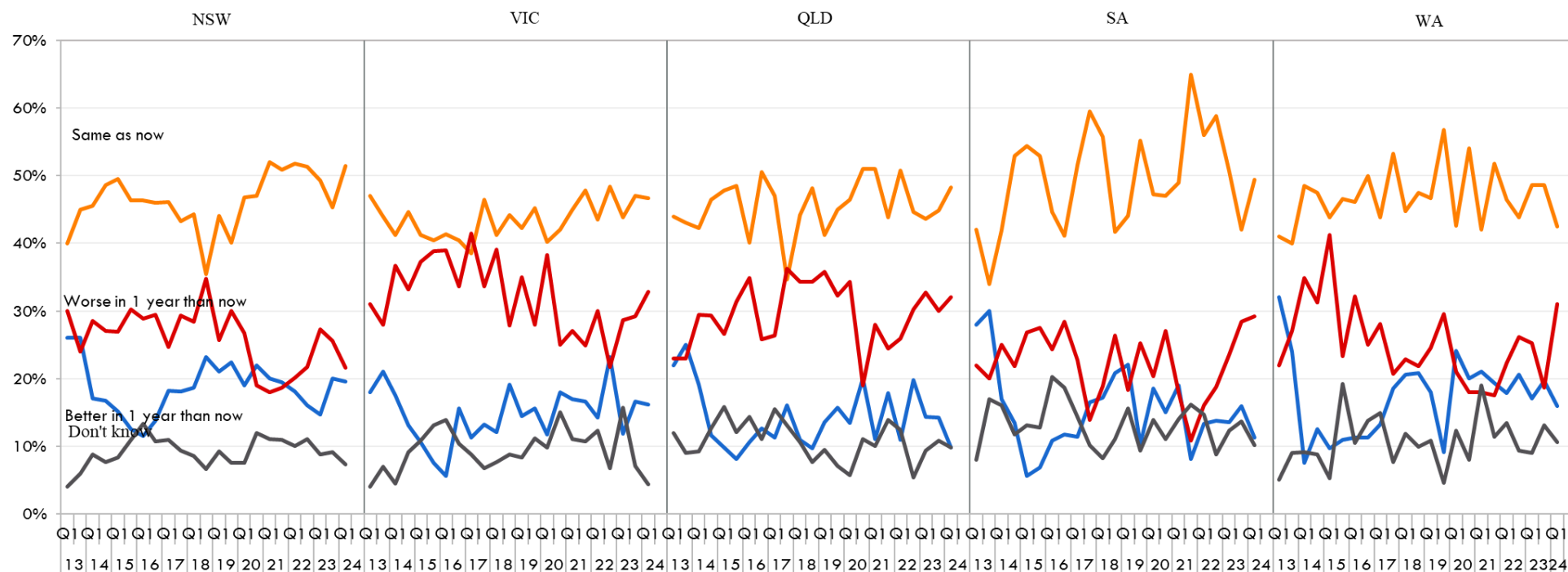
*Do you think that in 1 year's time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?*

- In September 2023, 48% 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, down from 17% in September 2023. In contrast, 29% of Australians said that the state of transport in Australia in one year would worsen, up from 27% in September 2023.



- In March 2024, about 22% of NSW residents said that the transport in Australia would worsen in one year, down from 26% in September 2023. In contrast, about 71% of NSW residents chose "better" or "same", up from 65% in September 2023. However, NSW is the only state with more positive or neutral opinions. In VIC, 33% of VIC residents noted that the state of transport in Australia would be worse in one year, up from 29% in September 2023. In QLD, 32% of QLD residents said the state of transport in Australia would worsen, up from 30% in September 2023. About 11% of SA residents said that the state of transport in Australia would be better in one year, down from 16% in September 2023. However, 16% of SA residents said that the state of transport in Australia would be better in one year, up from 14% in March 2023. In WA, there has been an increase in those who believed the state of transport in Australia would worsen in one year, up from 19% to 31% in March 2024. There has been a decrease in those who believed the opposite, down from 20% to 16% in March 2024. Overall, except in NSW, Australians have less confidence about the state of transport in Australia in one year's time.

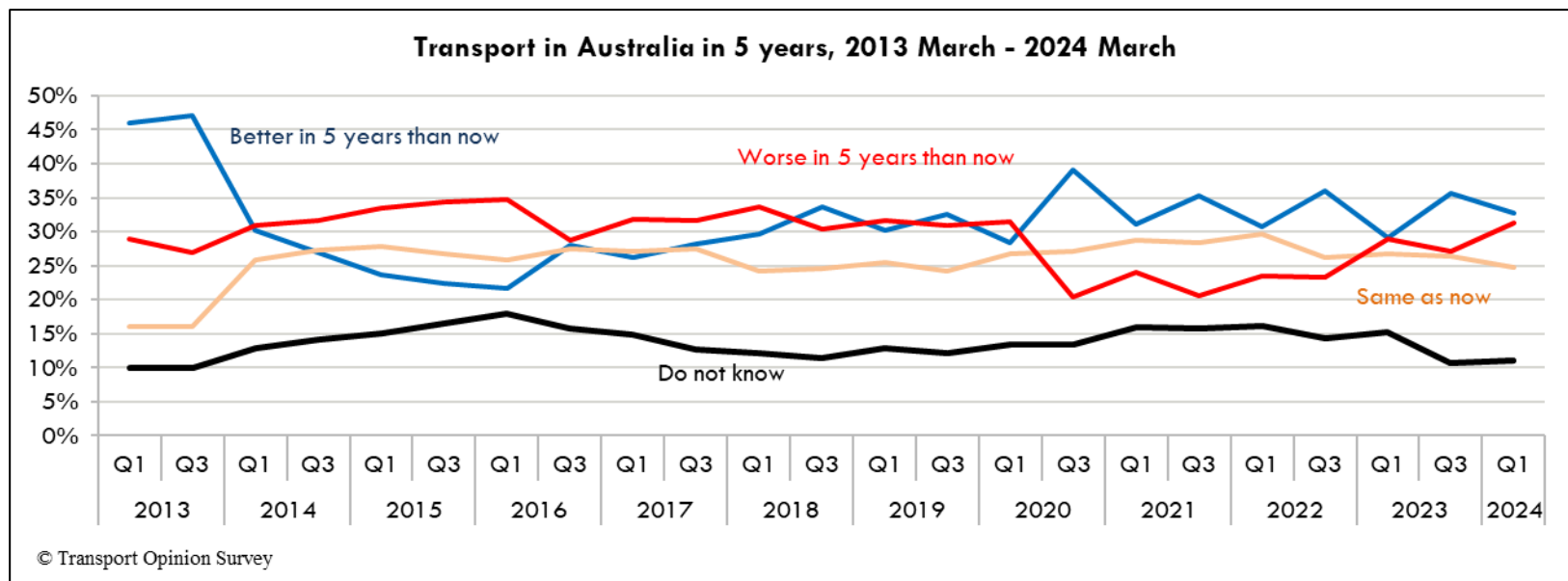
## Transport in Australia in 1 year time by state, 2013 March - 2024 March



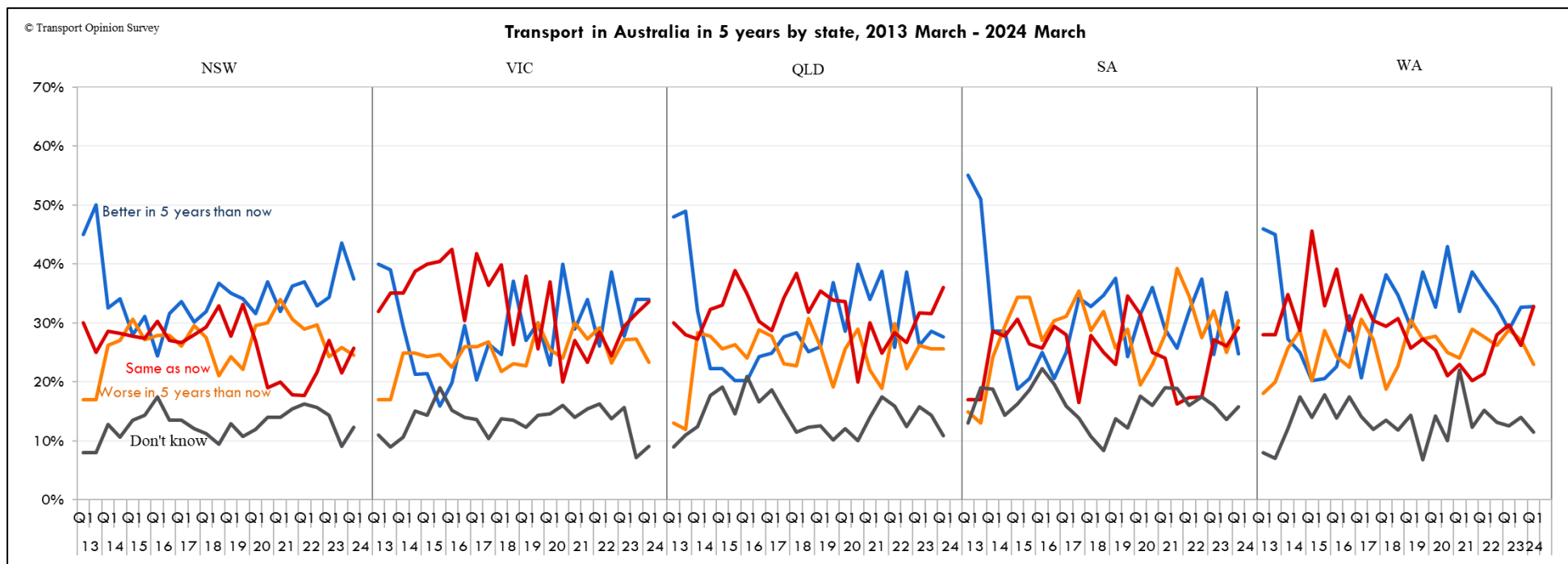
*Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?*

- Australians are less confident that the state of transport will be better in five years than it is now. In March 2024, 33% of Australian residents believed transport in Australia would improve in five years, down from 36% in September 2023. People who think the state of transport in Australia will worsen in five years is at 31%, up from 27% in September 2023.





- Australians across all states are gaining less long-term confidence about transport. Although NSW residents have shown more confidence in the short term, their views on Australia's long-term transport state are not positive. The proportion of NSW residents who believe Australia's transport will be better decreased from 44% in September 2023 to 37%, while the proportion of residents who think it will be worse has increased from 21% to 26%. In VIC, the proportions have remained similar to September 2023, with a slight increase in those who think transport will worsen from 32% to 34% in five years. In QLD, the proportion of QLD residents who believe Australia's transport will be worse in five years increased from 32% in September 2023 to 36%. In SA, the proportion of SA residents who believe Australia's transport will improve in five years decreased from 35% in September 2023 to 25%. In WA, the proportion of WA residents who believe Australia's transport will be worse in five years increased from 26% in September 2023 to 33%. In summary, Australians have an overall lower long-term confidence about transport in Australia in five years' time.



### 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, and transport in Australia in five years' time are reported as changes in the TOPS Index.

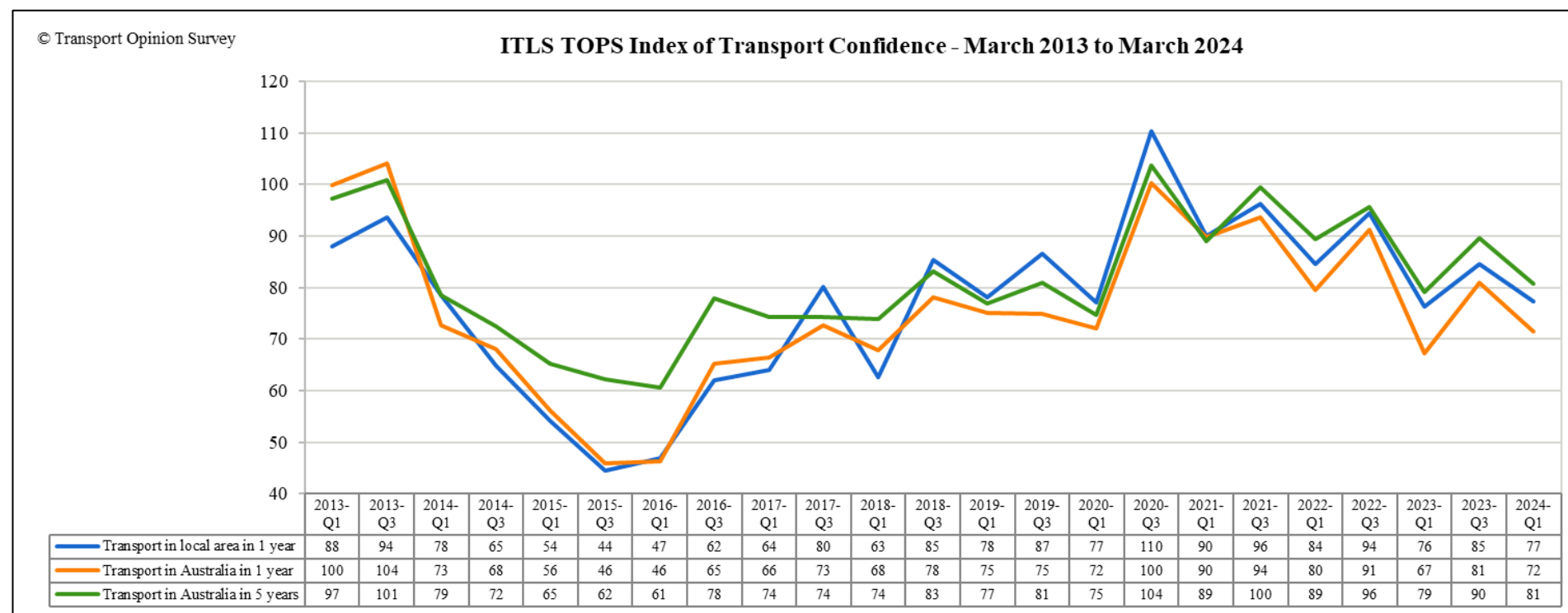
A TOPS Index value of more than 100 means that Australians' confidence about the state of transport getting better is more substantial relative to March 2010. A TOPS Index value of less than 100 means such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2024 quarter, as compared to September 2023:

- Australians have become less confident about improvements in transport in their local area in one year's time.
- Australians have become less confident about Australia's transport improvements in one year's time.
- Australians have become less confident about Australia's transport improvements in five years' time.

We cannot underestimate the significant impact of factors, including the housing crisis, population increase, and the cost of living pressure, on people's overall confidence, including their confidence in transport. Compared to the launch of TOPS in March 2010, Australians are less confident about improvements in transport in

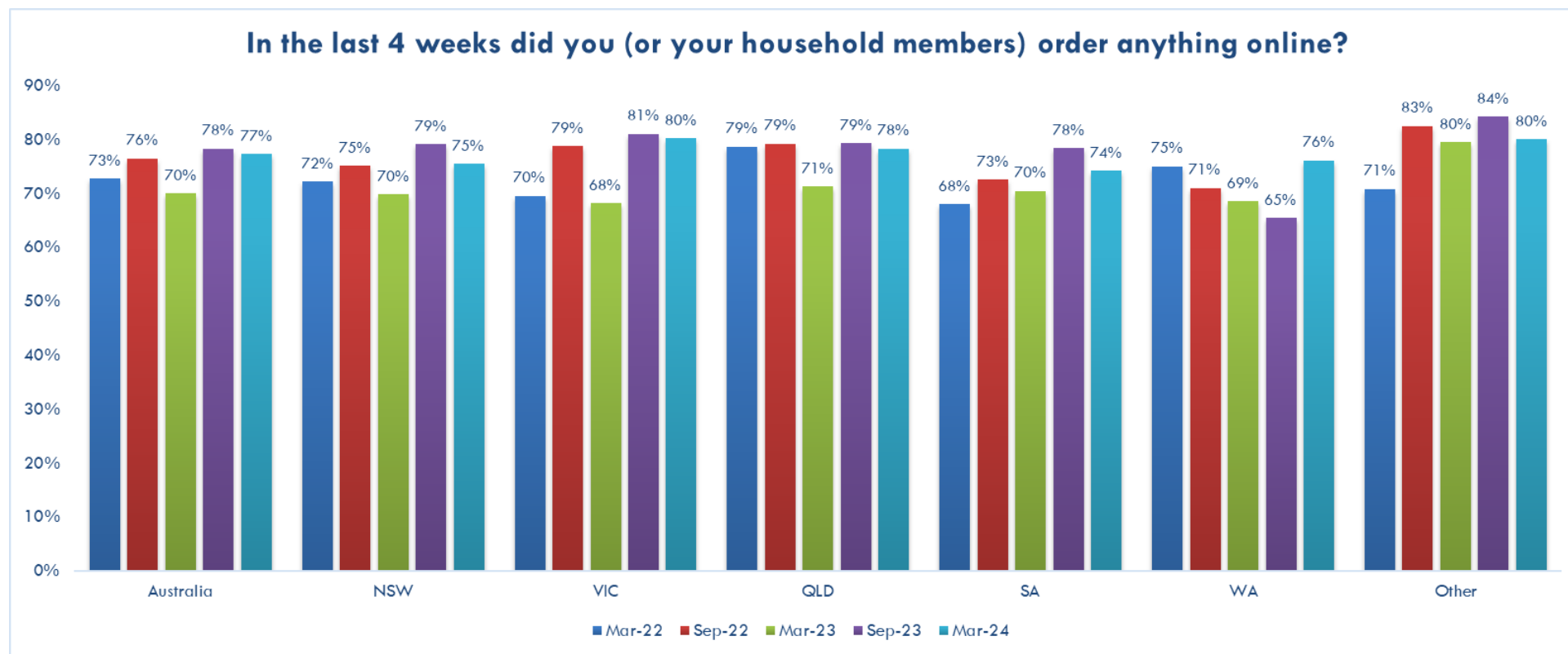
their local area in March 2024 (Confidence index: from 100 to 77) and in Australia in the next year (Confidence index: from 100 to 72) and are less confident about improvements in transport in Australia in five years' time (Confidence index: from 100 to 81). There has been a decline in confidence since September 2023. However, it is slightly higher than a year ago (March 2023), showing Australians are less confident about future enhancements in transport in 2024, given all the difficulties Australians have encountered since the beginning of 2023. Although people have overcome many challenges in the past year and recovered some confidence since March last year, they are still under the impact of the housing crisis, high cost of living and petrol prices, and transport services and infrastructure issues. The consequences of some of these events, such as the housing crisis and increased cost of living, will continue to impact transport. We will see whether there will be a continuous recovery of confidence in the September 2024 survey.



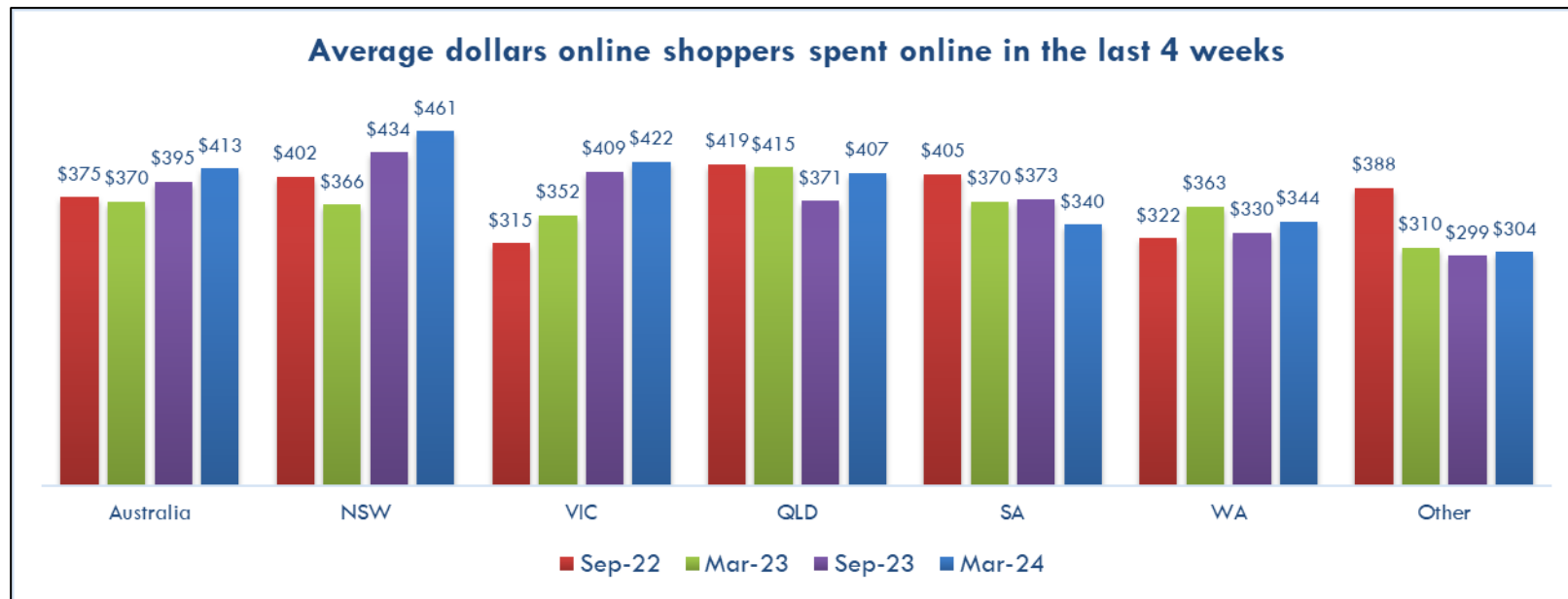
### Supplementary questions in March 2024

#### Online shopping and total & category spending

— About equal proportion of Australians shop online compared to September 2023 with 77% of Australians shopped online over the last four weeks.

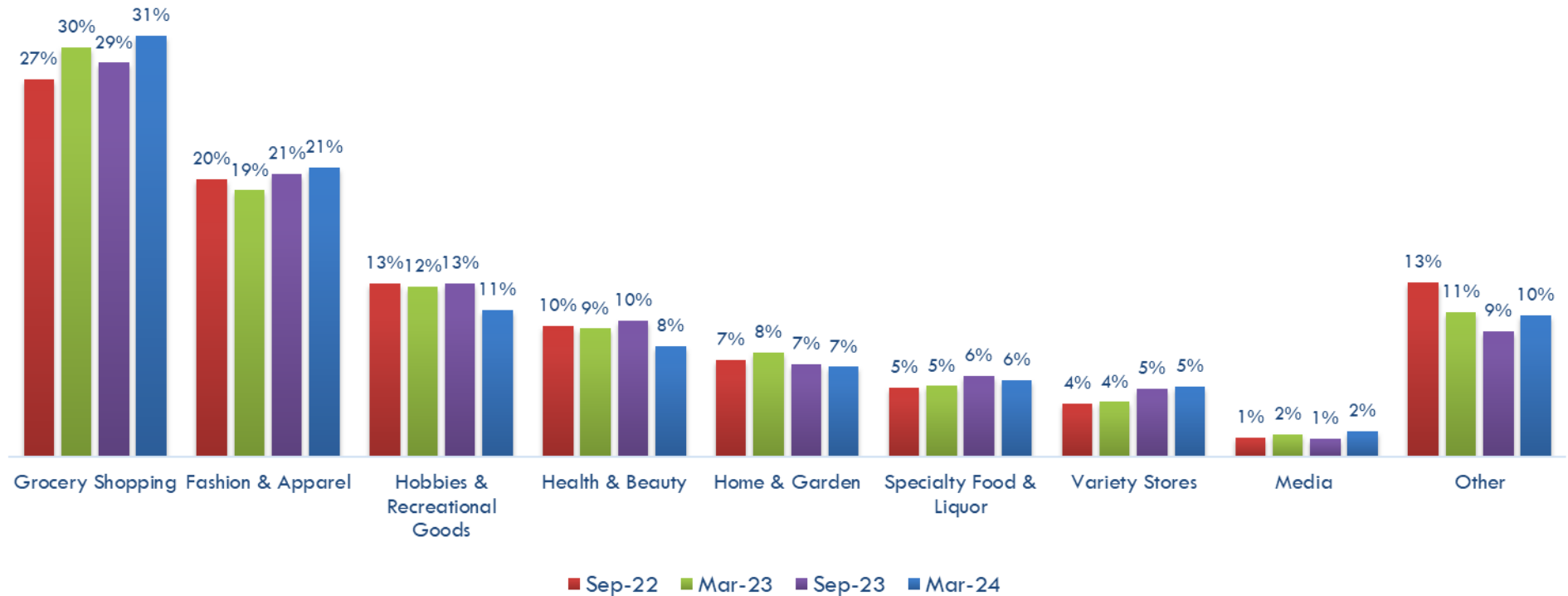


The graph below shows that online shoppers in Australia spent about \$413 on average in the last four weeks, more than an average of \$395 in September 2023. Online spending has been increasing, given the trend over the previous 18 months. Online shoppers in NSW and VIC spent the highest amounts, averaging \$461 and \$422 in four weeks. In QLD and WA, the average amounts are \$407 and \$344. In SA and other states and territories, the average amounts are the second lowest and the lowest at \$340 and \$304.

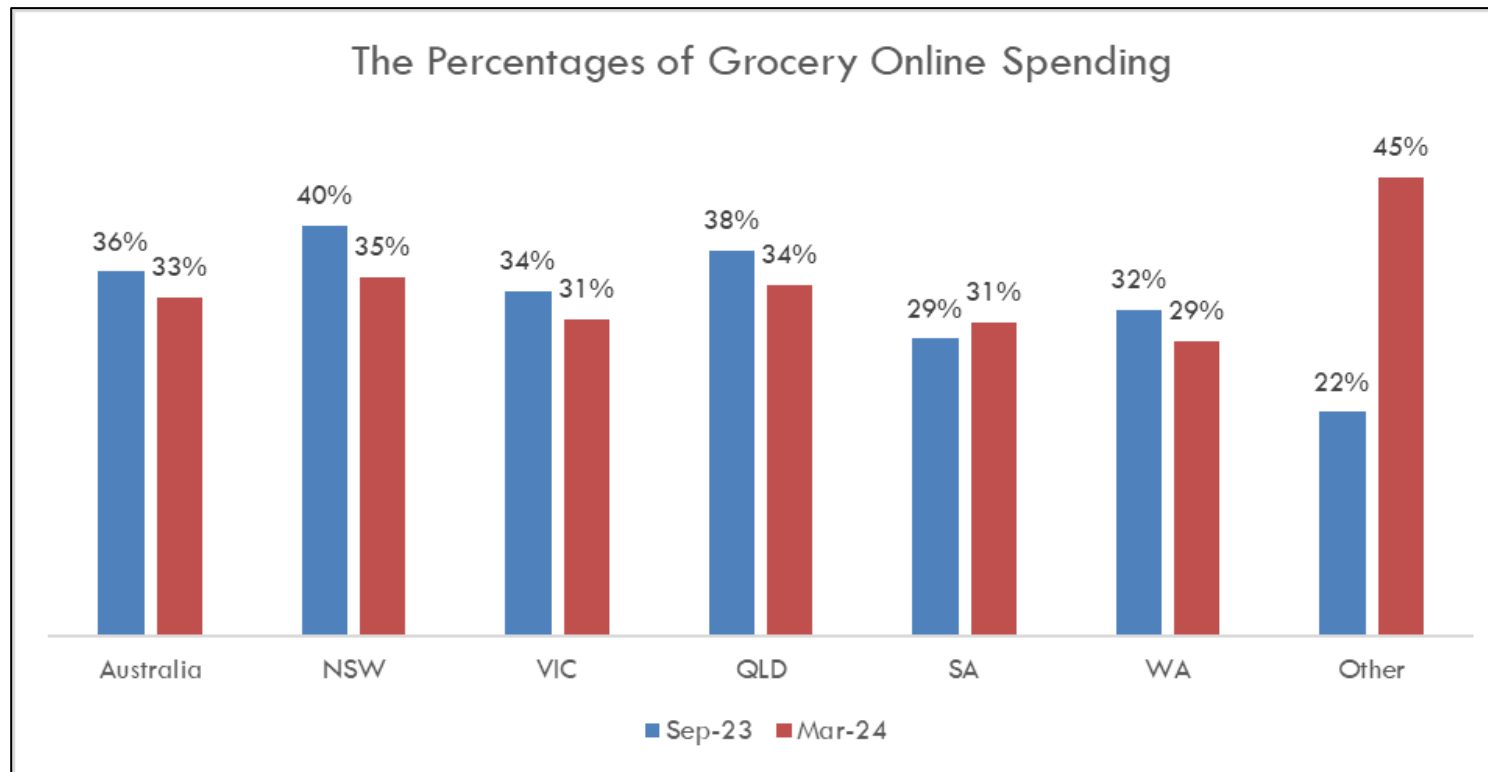


As shown in the graph below, of all the categories Australians purchased online, grocery shopping is the largest, accounting for 31% of the total online spending, up from 29% in September 2023. Fashion/apparel ranks second in total online spending, contributing 21%. These two categories are followed by spending online on hobbies and recreational goods (11%), health and beauty products (8%) and home and garden products (7%). These five categories account for 79% of the total online spending. This number is identical to the previous waves of March 2023 and September 2023.

### How was the expenditure spent?



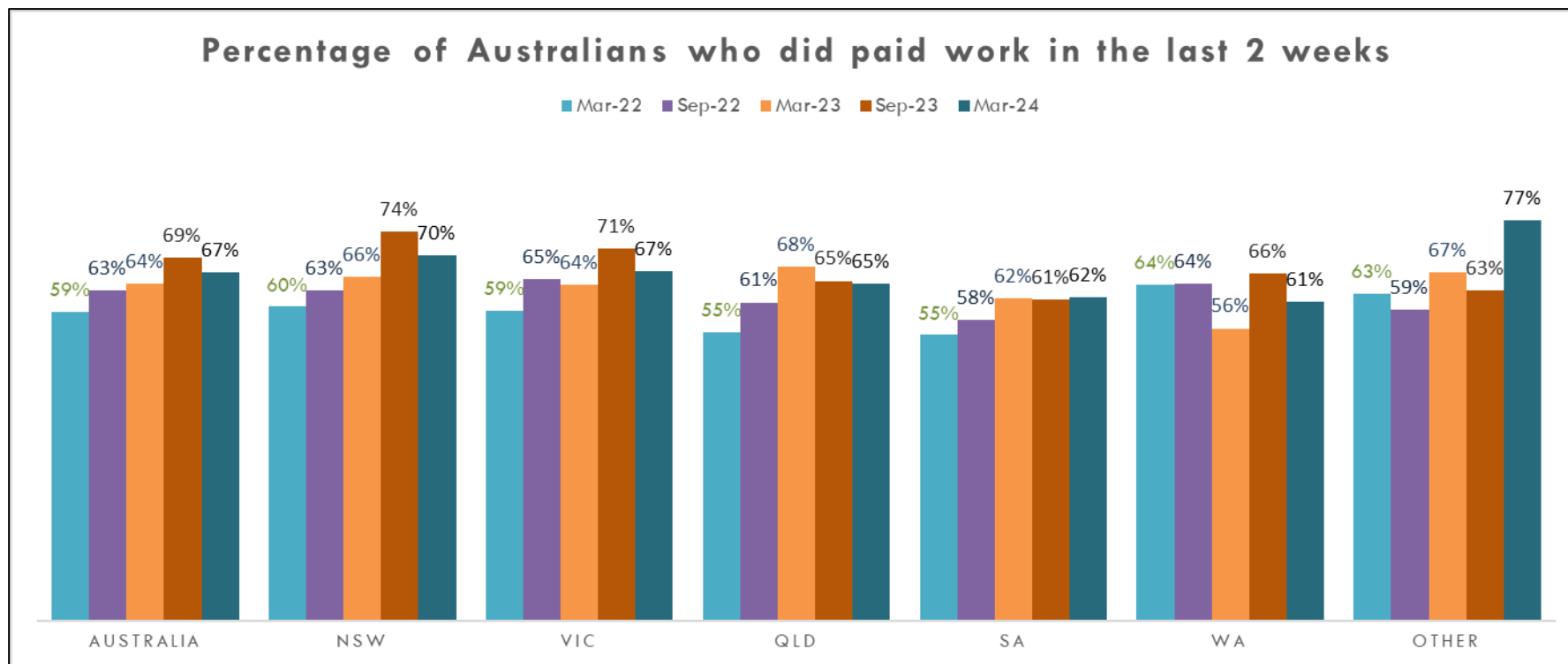
As the biggest online shopping category (31% of the total online spending), online grocery shopping also accounts for 33% of the total grocery spending for online shoppers, a slight decrease from 36% in September 2023. About 67% of total grocery spending is in-store shopping. There are some differences across different states, as shown in the graph below. Online shoppers in every state spent 29% to 45% of total grocery expenditures online, with ACT/NT/TAS as the highest at 45% (an increase from 22% in September 2023).



## Working from home (WFH)

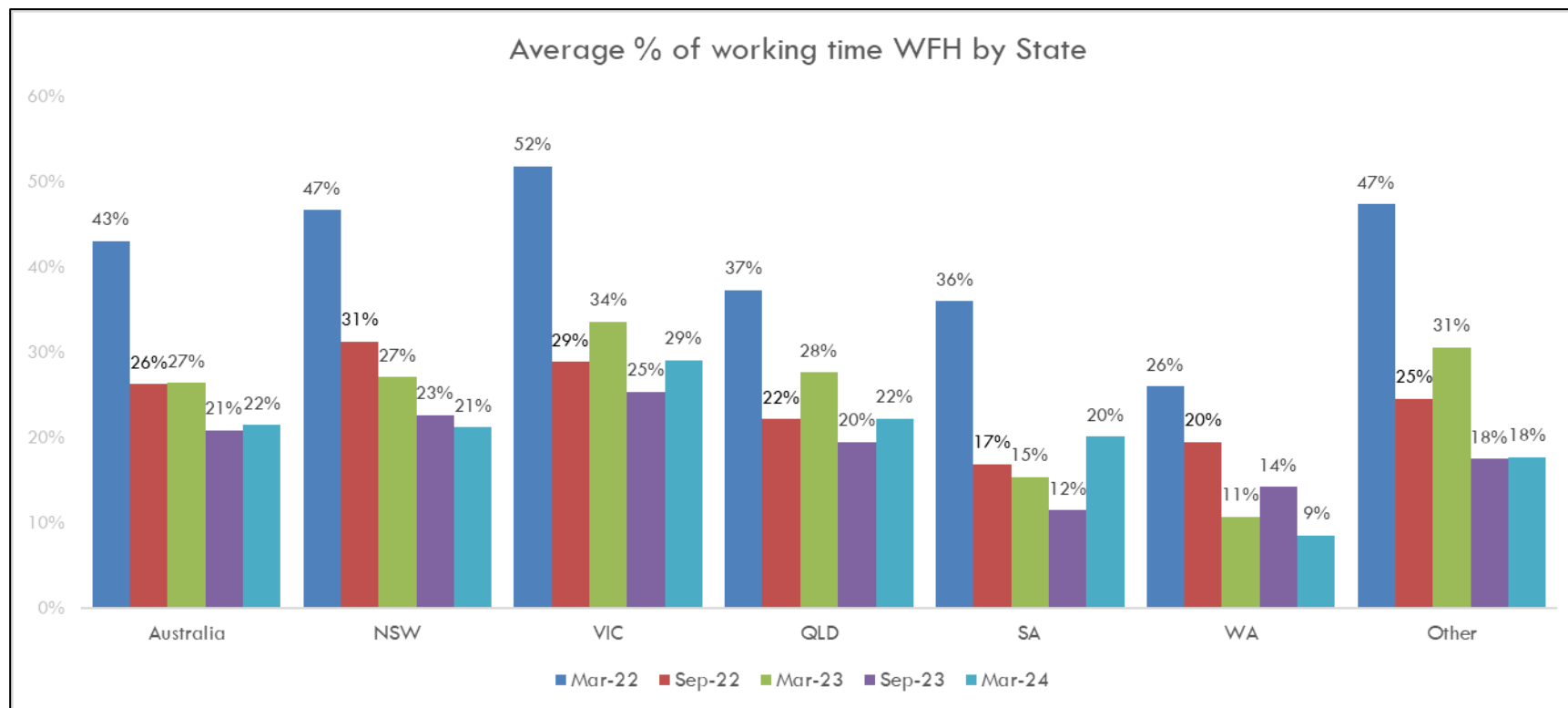
In the March 2024 survey, we changed the way we asked questions about work time and locations. We asked about work patterns in a typical working week instead of the recent weeks. A typical working week can better represent how people work and commute in the long term. We can still make some connections to past waves, especially regarding the incidence of WFH. A significant improvement in the new questions allows us to specify the number of hours for each day of the week (DoW) and time of the day (ToD) associated with various working locations, working hours, commuting time, and hybrid work. To ensure we obtained the same group of respondents as the previous waves, we still defined working people as people who did paid work in the last two weeks. We adopt the new questions based on a typical working week in the follow-up questions about how they work.

As shown in the chart below, 67% of Australians undertook paid work in the last two weeks, slightly lower than 69% in September 2023. In the two largest states, NSW and VIC, the percentages of working people are 70% and 67%. More Australians are not working in March 2024 compared to September 2023. This slight decrease in the working population may reflect the recent small increase in the unemployment rate. Of all the working people, about 7% mentioned that they have more than one job.

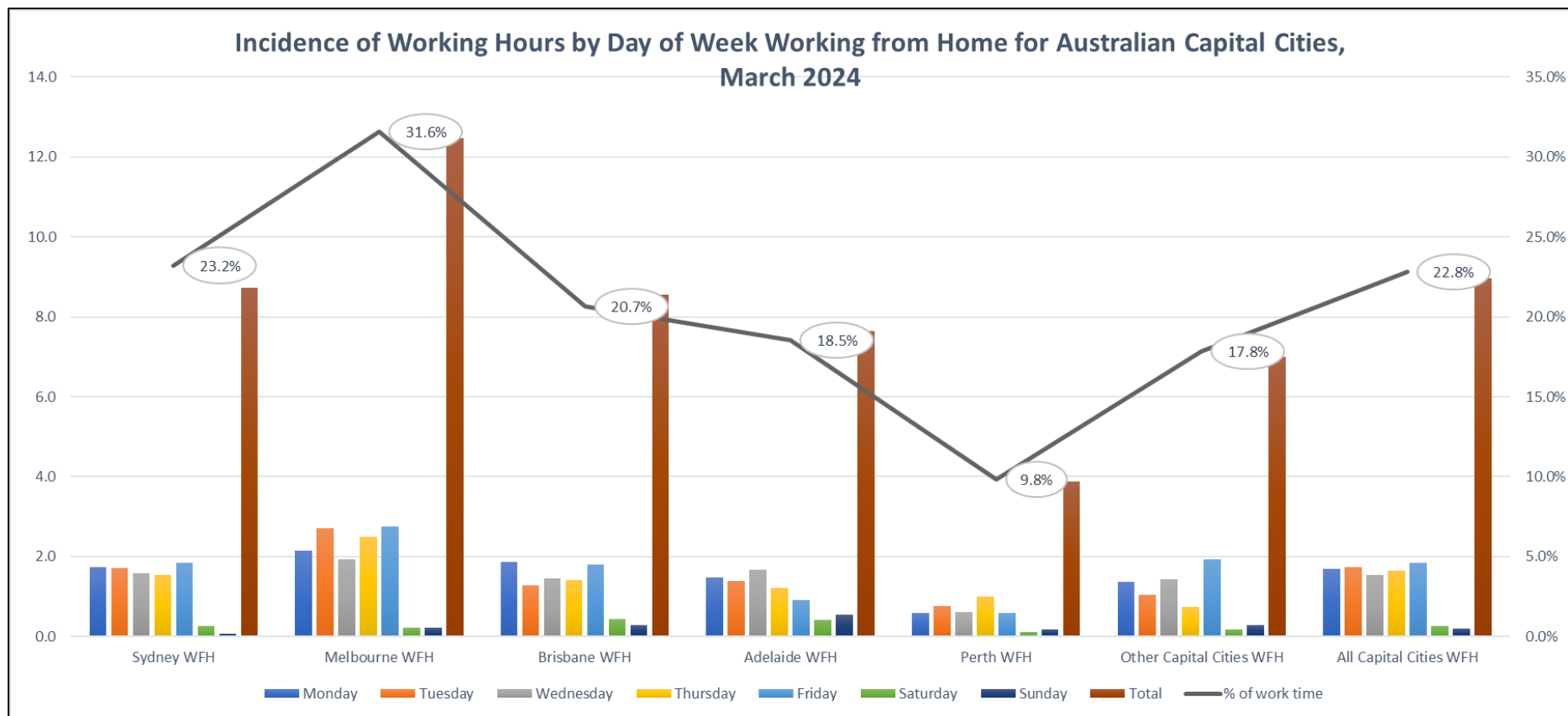


In a typical week, workers spend an average of 38 hours working, with 27.4 hours spent in their main workplaces (72%), 8.2 hours from home (22%) and 2.5 hours from elsewhere (7%). The percentage for the WFH is about the same as the figure in September 2023. WFH proportions have increased in VIC, QLD, and SA but slightly decreased in NSW and WA.

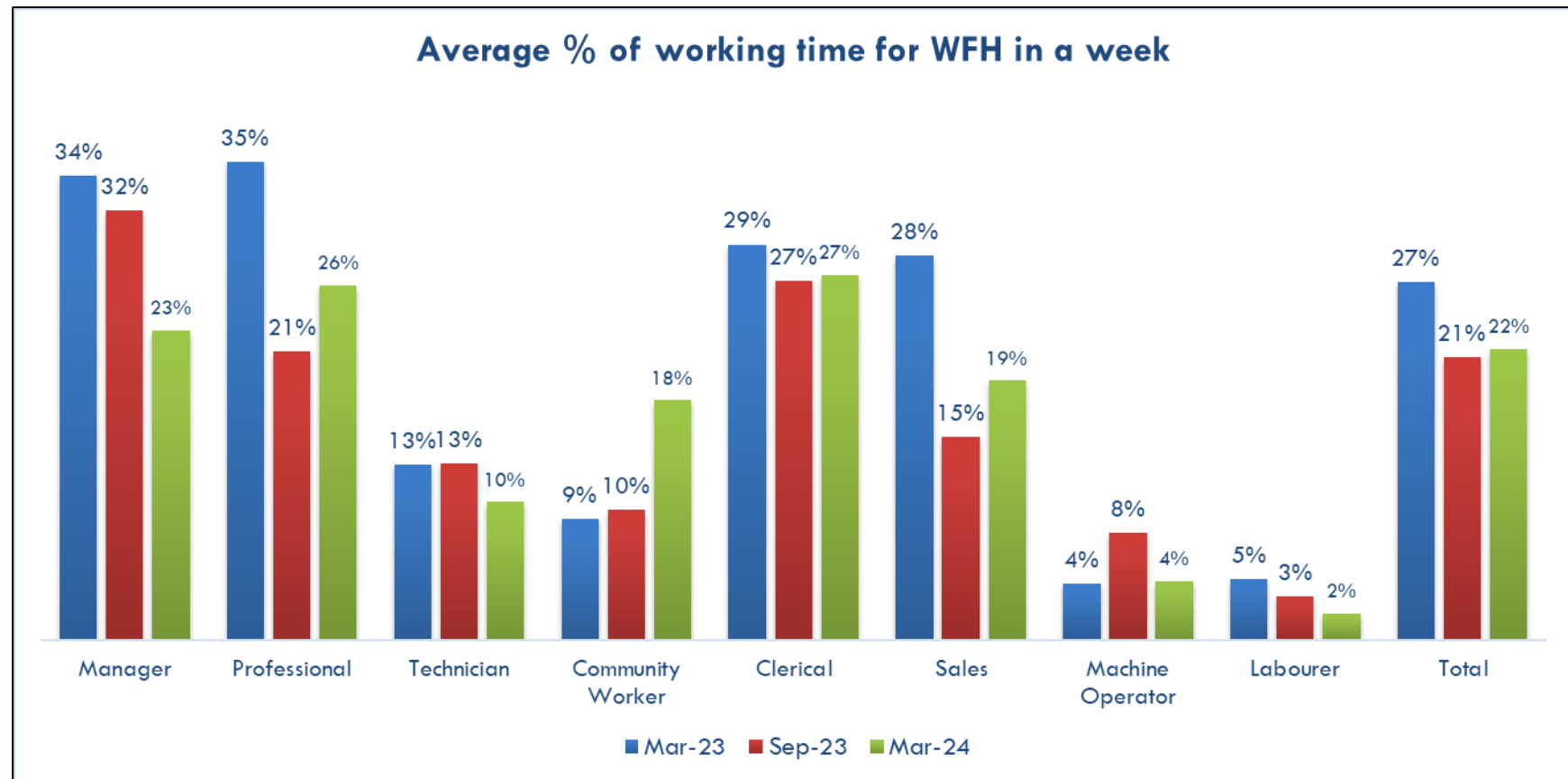




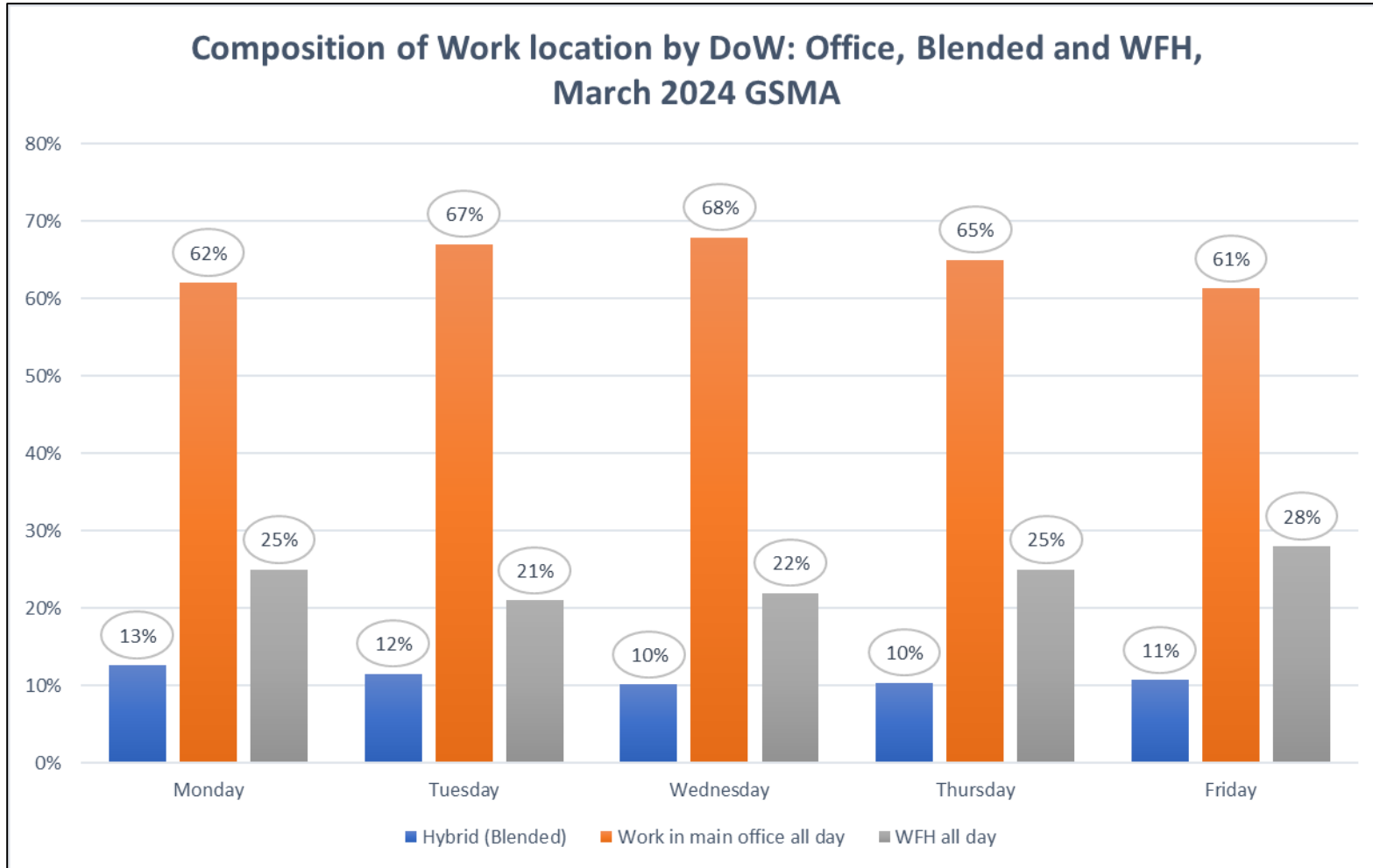
Among all capital cities, the percentage of WFH time is the highest in Melbourne (31.6%). It is followed by Sydney (23.2%) and Brisbane (20.7%). The percentages of WFH hours are below 20% in Adelaide, Perth and other capital cities. The overall incidence of WFH for all capital cities in Australia is close to 23%. Despite different methodologies used in asking questions about WFH, the findings in the September 2023 survey recorded the same order among the three main capital cities in terms of the time spent on WFH. Melbourne ranked first with the highest number of working days WFH (1.03 days per week), followed by Sydney (0.93 days per week) and Brisbane (0.82 days per week). This phenomenon is consistent regardless of how we measure it.



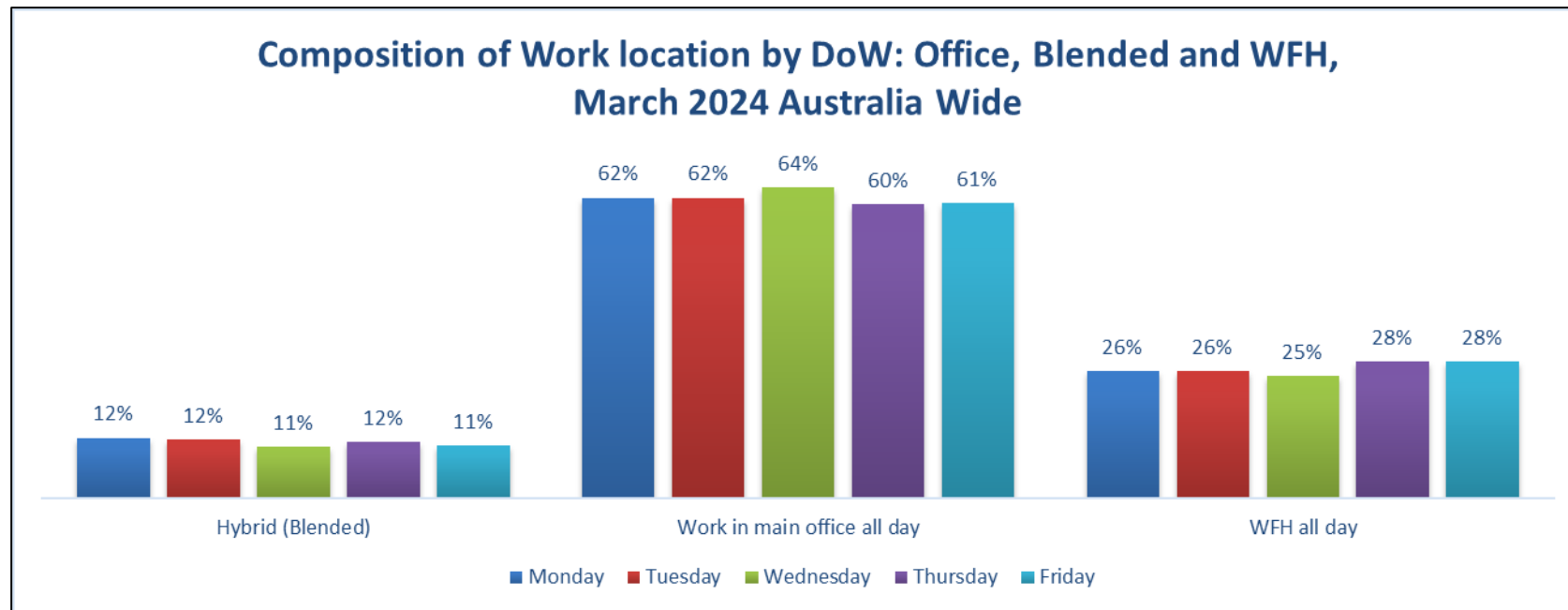
Among all the occupations, professionals, community workers, and salespeople have increased the proportions of WFH hours while managers have reduced them.



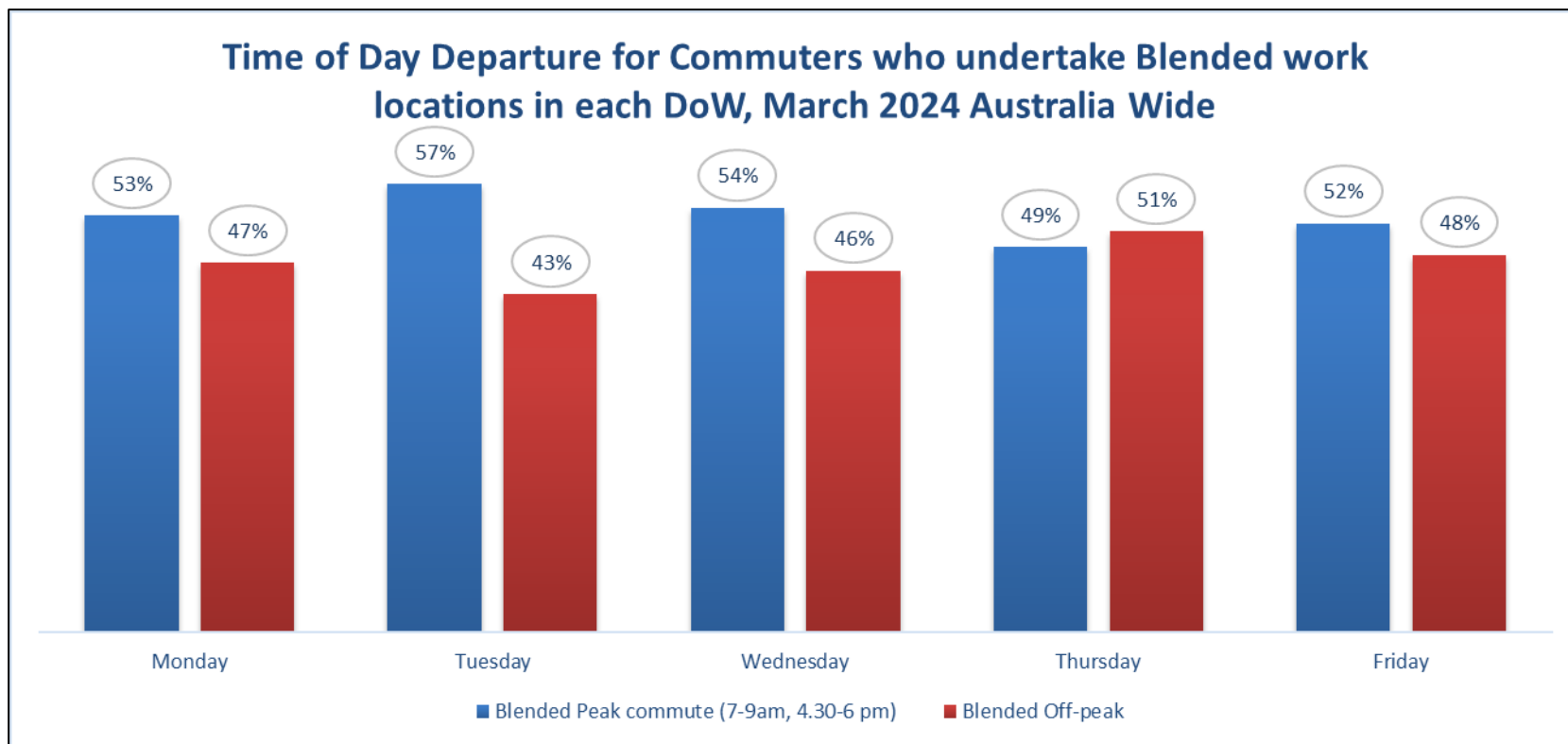
The pattern of how people arrange their work hours is similar from Monday to Friday in the national data. However, a more apparent pattern can be observed in the GSMA data, which shows how people may arrange their work time. At the beginning and the end of the week, we see a slightly higher number of people working from home only, with Friday at 28% and Monday at 25%. In contrast, mid-week days, including Wednesday (68%), Tuesday (67%) and Thursday (65%), have the highest levels of people working from the main workplace only. Monday (13%) and Tuesday (12%) are the days with more people working hybrid at both places.



The pattern is less evident in the nationwide data, as shown below. However, the proportion of WFH-only individuals is still at the highest on Friday (28%), and the proportion of people working at the main offices only is also at the highest on Wednesday (64%).

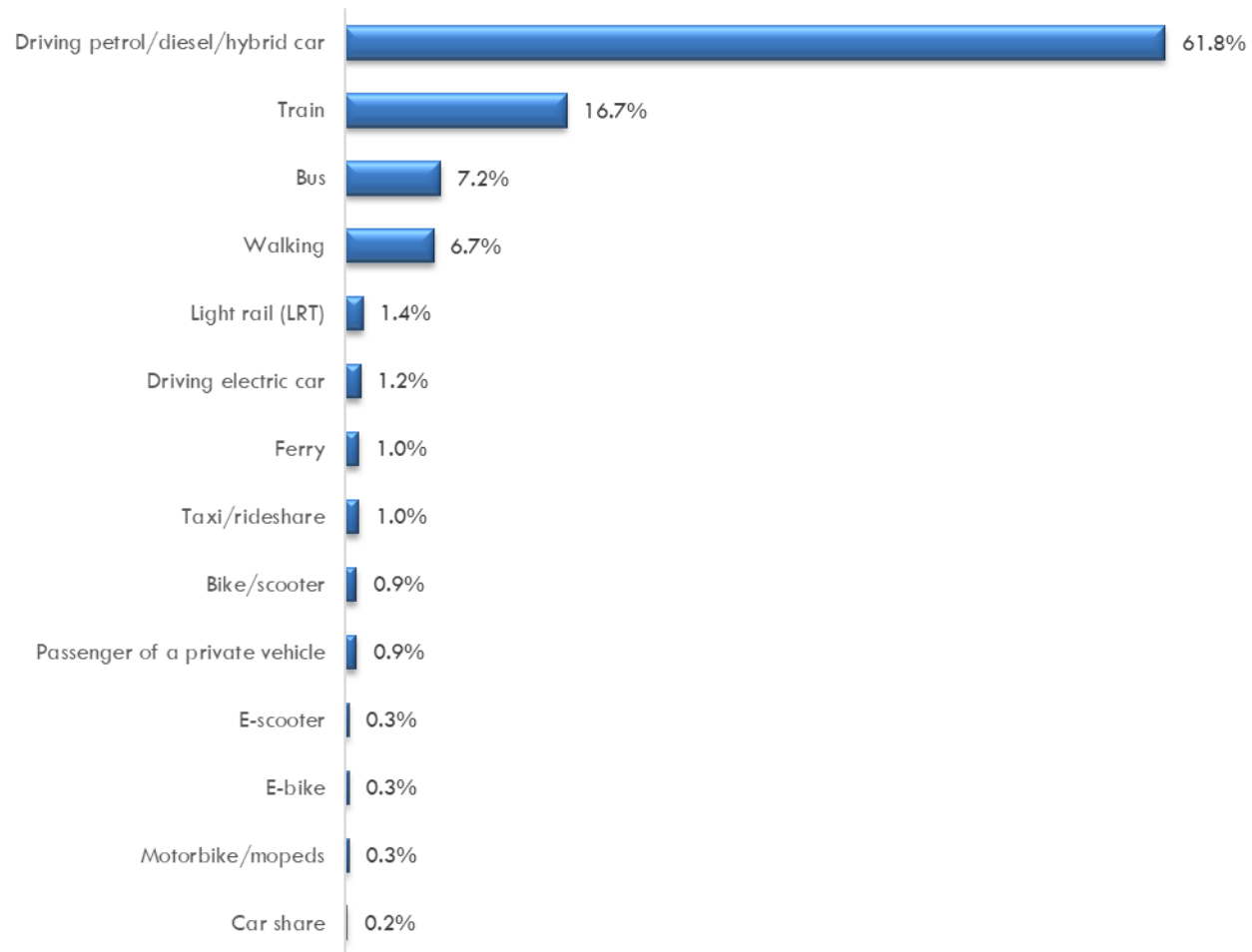


Workers commute to the workplace at different times throughout the week. Tuesday sees the highest proportion of people leaving home during peak hours, either in the morning or afternoon peaks (i.e., afternoon peak for working the night shift). Monday, Wednesday and Friday appear similar regarding peak hour commuting between 52% to 54%. Thursday is the only weekday that more people commute during off-peak hours than peak hours (51% vs. 49%). There appears to be a noticeable switch out of peak periods to off peak periods for commuting.

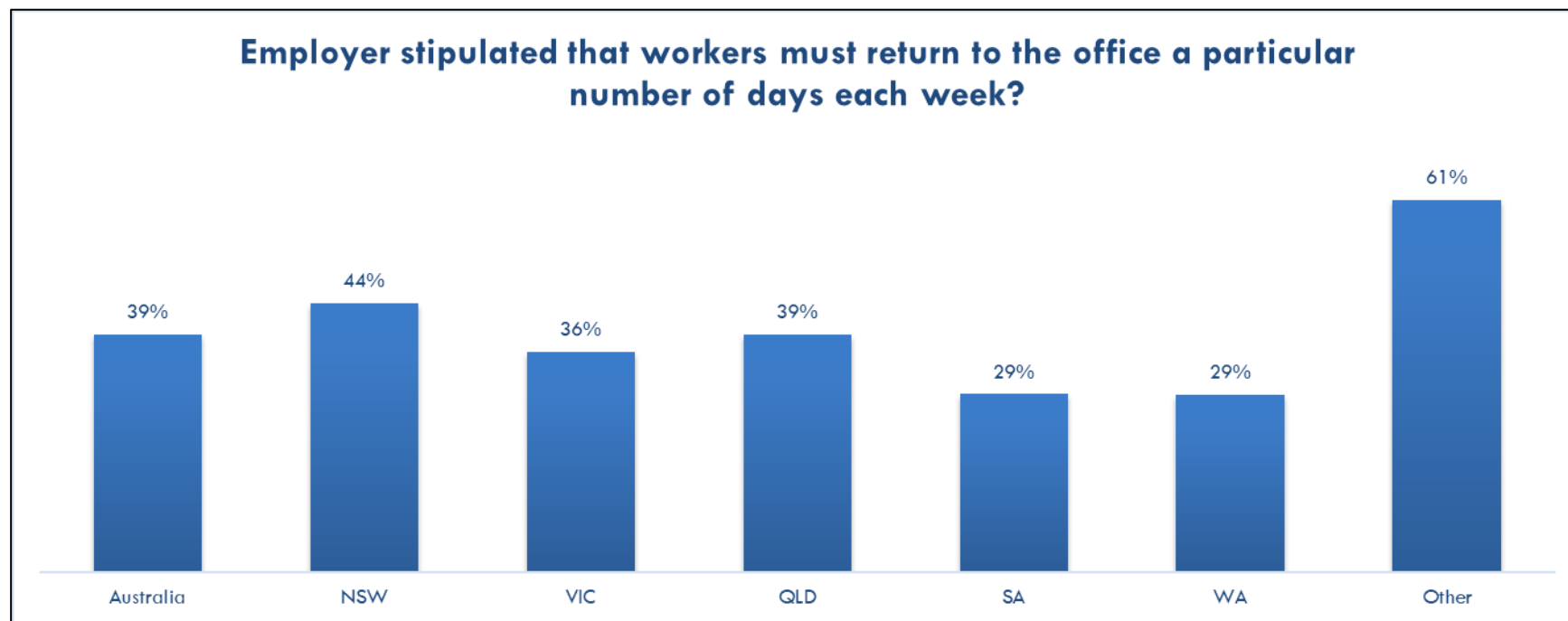


Driving any petrol/diesel/hybrid vehicle is the most dominant mode of transport for commuting at 61.8%. Taking public transport is also popular, with taking train at 16.7%, bus at 7.2%, and light rail and ferry at 2.4% combined. Driving an electric vehicle for commuting has a small share at 1.2%. Active modes of transport are the choices for a small proportion of commuters, with walking at 6.7%, cycling at 0.9% and using E-bike/E-scooter at 0.6%. Taxi use, rideshare, and car share for commuting have a combined mode share of 1.2%. Using private vehicles as a passenger has a small share of 0.9%. Driving motorbikes or mopeds is the choice for 0.3% of commuters.

### Main Mode of Transport for Commuting



We asked whether their employer stipulated that they return to the office a particular number of days each week. About 39% of workers answered "yes", which is lower than 42% in September 2023.

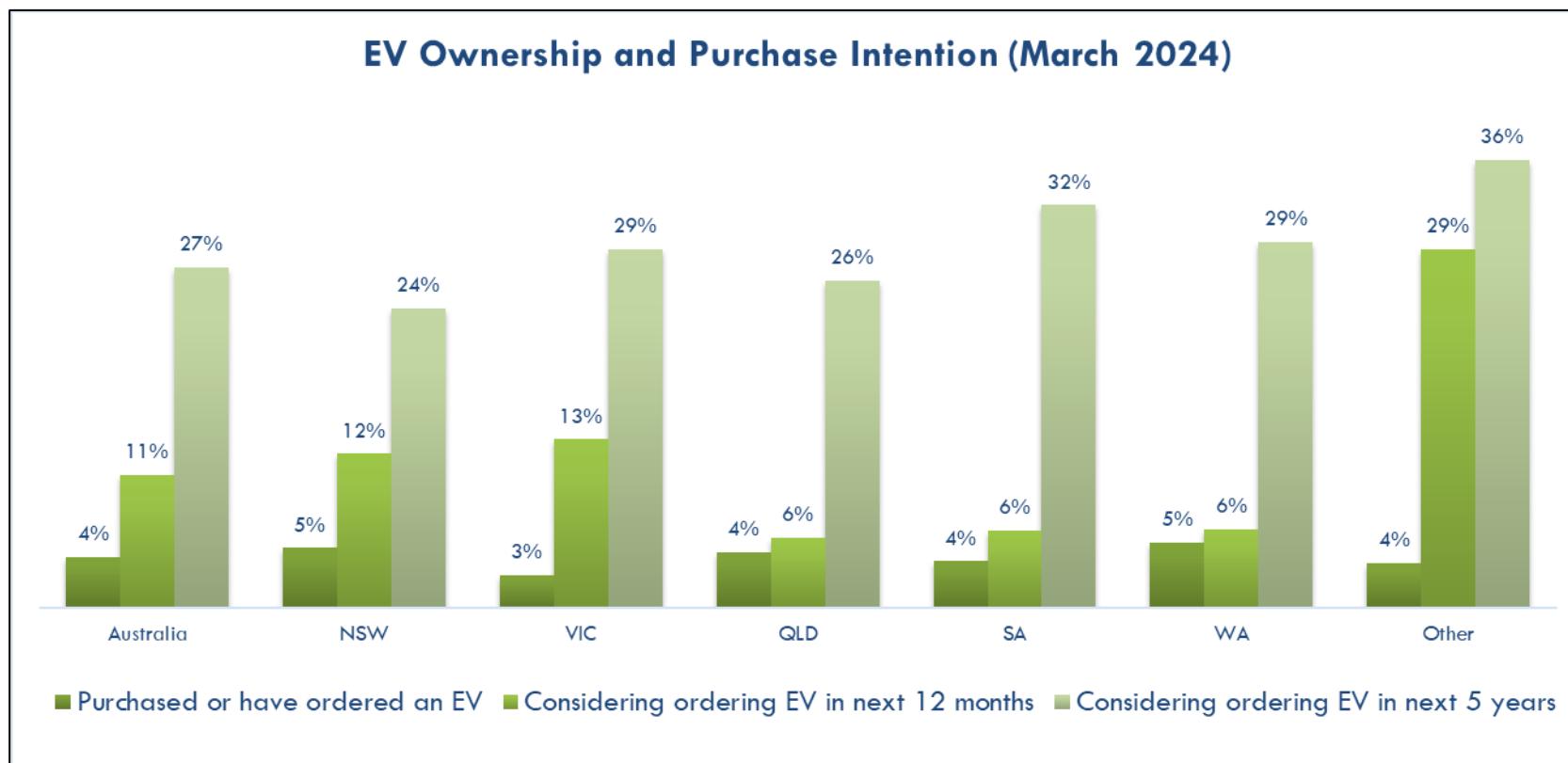


### Electric vehicle and personal mobility devices

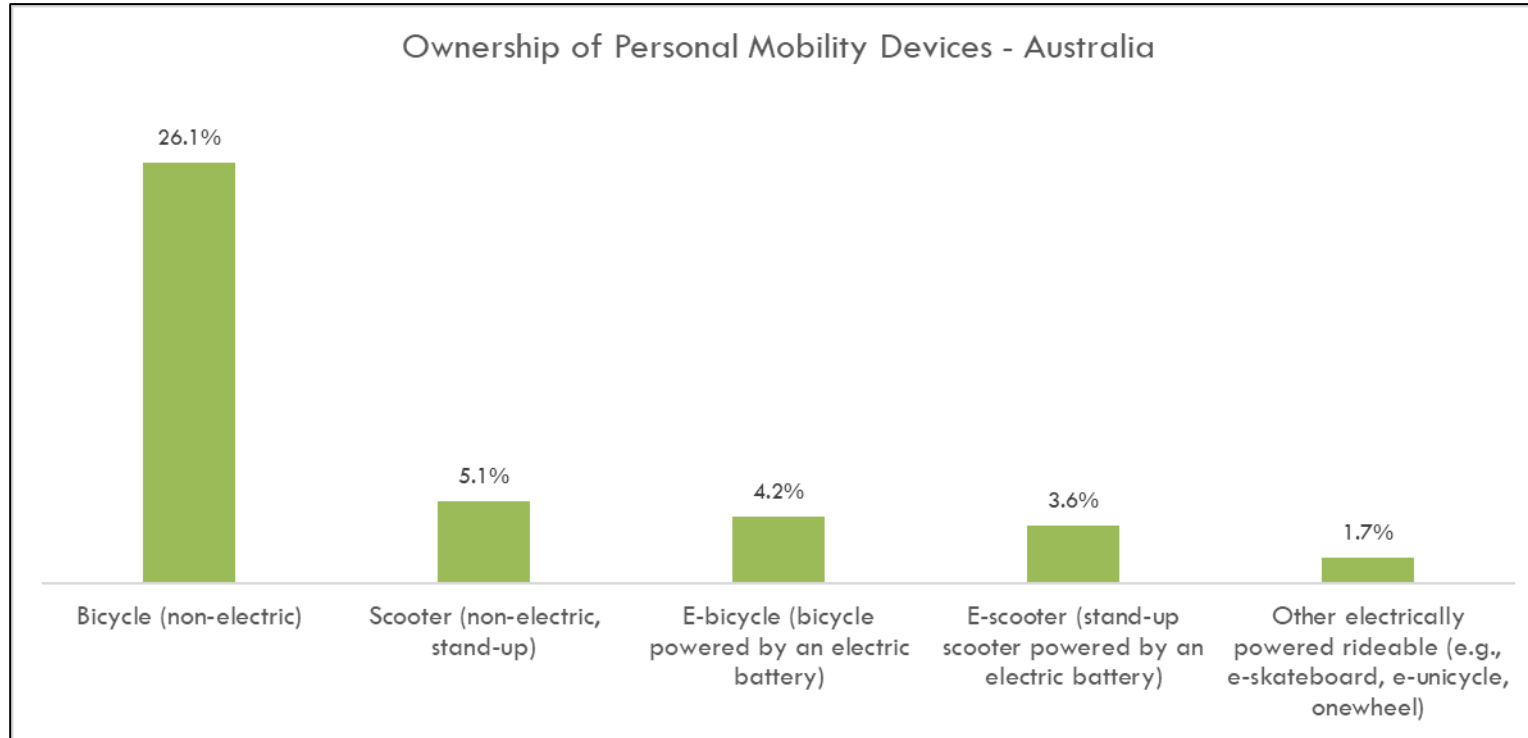
We asked Australians about their ownership status and intention to purchase an electric vehicle (EV). Among the 88% of Australians who gave an opinion, 4% have bought or ordered an EV, 11% are considering ordering an EV in the next 12 months, and 27% are considering ordering an EV in the next five years. In contrast, 15% of Australians are not interested, although they can afford an EV. About 44% of Australians cannot afford an EV and are not considering ordering one. This finding shows that there is a big task to improve the affordability of EVs and convince more than half of Australians that EV is an option. Once the market's full potential for those who own or intend to purchase EVs has been reached, will further increases in EVs halt because of lack of interest or financial capacity for the remainder of the population? It is a question to consider for a sustainable transport future.

NSW and WA residents have the highest levels of ownership of EVs, with 5% of the residents who answered the question) either own or have ordered an EV. In other states and territories, the ownership levels are at 4%. In the next 12 months, over 10% of VIC and NSW residents intend to order an EV. Although the intention levels are high for ACT/NT/TAS, caution must be taken, given the small sample sizes in these states and territories.

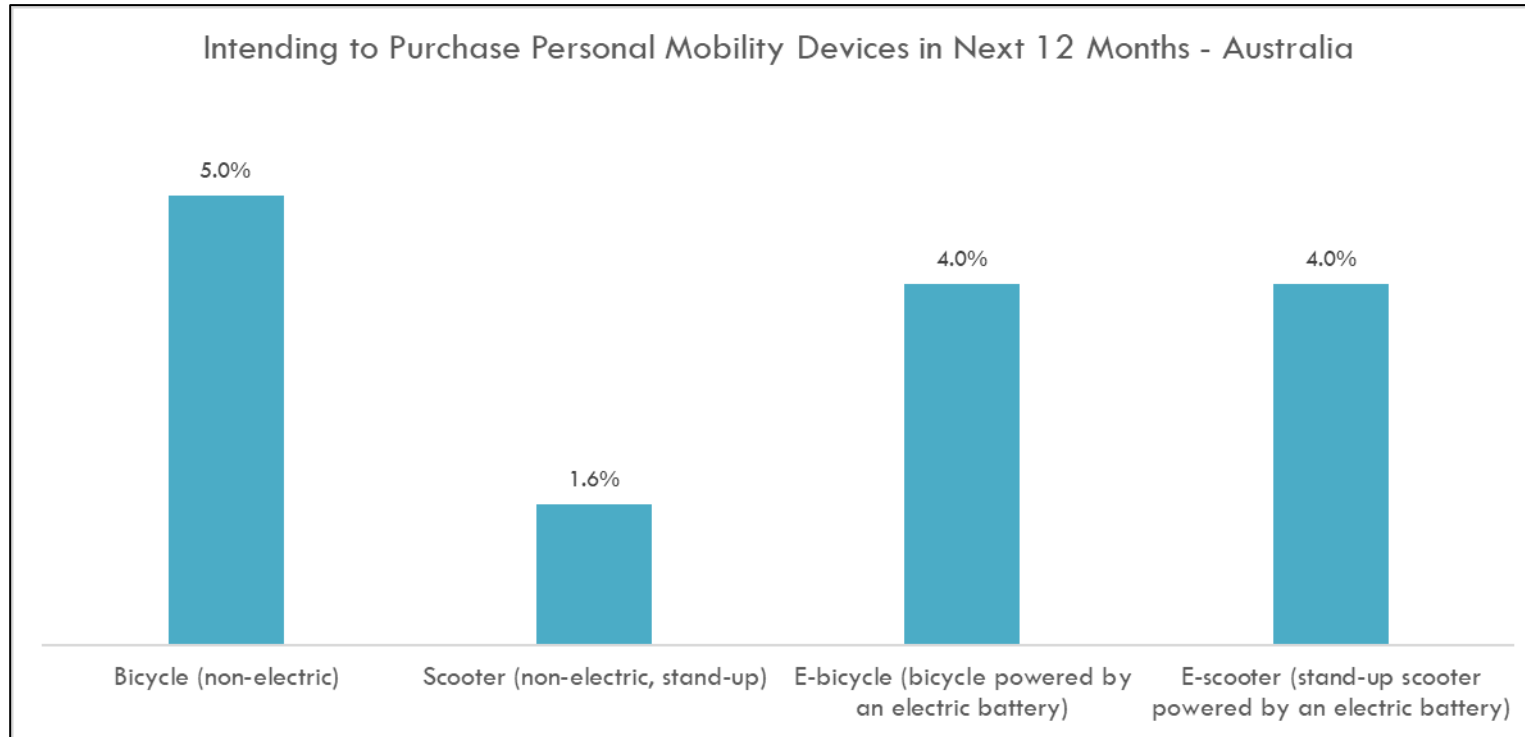




About 33% of Australian households own at least one personal mobility device, such as a bicycle, scooter, e-bike, or e-scooter. Non-electric bicycles have the highest level of ownership, at 26% of Australian households. E-bike and E-scooter have an ownership level of 4.2% and 3.6%.

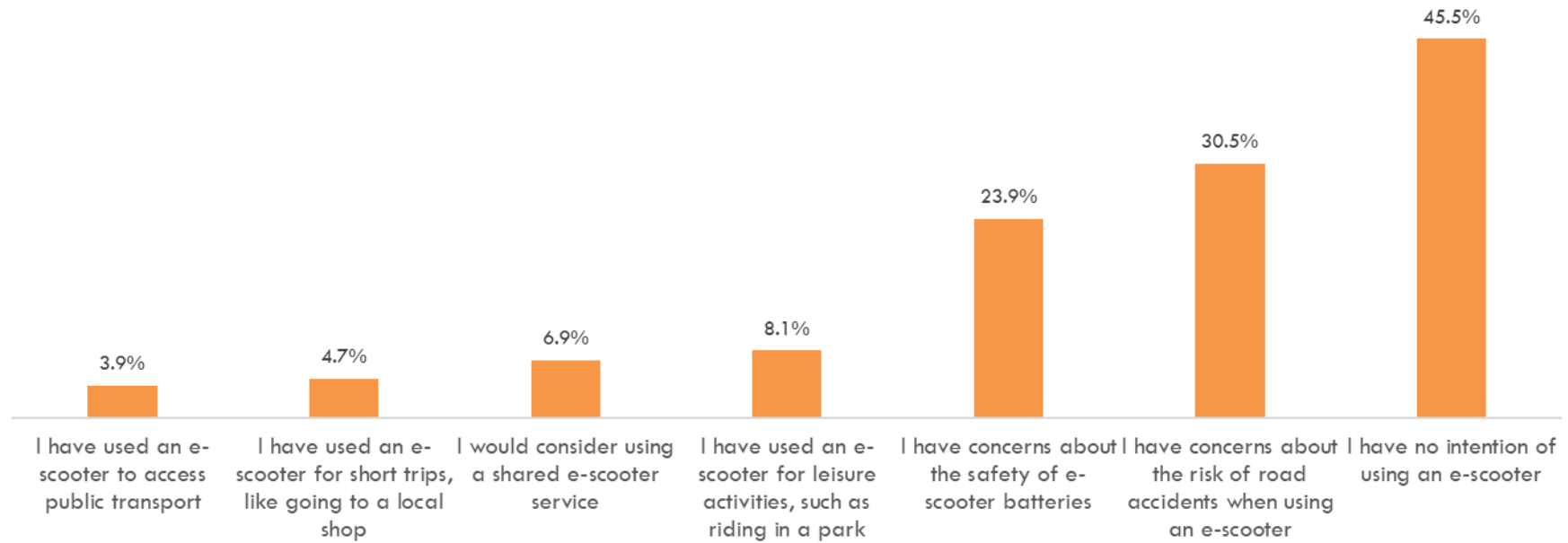


Equally, 4% of Australians plan to purchase E-bikes and E-scooters in the next 12 months. Of all Australians, about 13% intend to buy any personal mobility devices, including non-electric bicycle or scooter, E-bike, or E-scooter.



We asked Australians about their opinions and experience using E-scooters. About 46% of Australians have no intention of using one. However, the remaining 54% have used or intended to use an E-scooter. About 4% of Australians have used it to access public transport, 4.7% have used it for short trips, and 8% have used it for leisure activities. About 7% of Australians have shown interest in using shared E-scooters. However, over 30% of Australians have concerns about road safety when using an E-scooter, and about 24% are concerned about the safety of E-scooter batteries.

### Have you used or what concerns do you have regarding e-scooters? - Australia



## 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
- March 2023: March 1st – March 9th 2023
- September 2023: September 7th – September 18th 2023

- March 2024: March 1<sup>st</sup> – March 10<sup>th</sup> 2023

### **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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