THE UNIVERSITY OF SYDNEY
Business School

Transport Opinion Survey (TOPS)

March 2023

Institute of Transport and Logistics Studies (ITLS)

Highlights

Note: This survey was conducted from March 1st to March 9th, 2023. Public confidence in transport has dropped significantly from the last survey wave in September 2022. All three transport indices have fallen from above 90 to below 80. Public confidence in transport at present is at its lowest level since September 2018, even lower than during the pandemic. The public is under the impact of high inflation, high cost of living, and ten continuous interest rate rises. The public is unsatisfied with many problems in the transport area. The infrastructure damage caused by natural disasters is yet to be fully fixed. Many have raised the issue of the poor condition of roads. More subpar public transport service has also contributed to more people thinking the tranport in their local areas is worsening. For instance, people in NSW have been experiencing frequent delays and cancellations of both train and bus services over months due to various reasons such as system failure and unresolved industrial disputes. Some have experienced cancellation of flights. It is unusual, but in this survey wave, some have also complained about supply chain and freight problems causing empty shelves and a lack of supply of essential goods in supermarkets and stores. The positive news is that despite soaring petrol prices, cost of living and other negative economic impacts, people's weekly working hours and work-from-home arrangements have stayed stable since September. Their online shopping behaviour and expenditures across categories of goods have not dropped, showing no heavy reduction in family spending.

Economy/employment and housing are the two highest-priority national issues

– In September 2022, 47% of Australians nominated health as the top priority, given that Australians were still in the last wave of the Omicron variant. In March 2023, only 37% of Australians nominated health, with a 10% reduction. Economy and employment (44%) and housing (42%) are rising as top priorities. Housing has increased from 33% to 42% from the last wave. This finding is unsurprising, given the recent heavy media coverage of these two issues.

Public transport and road improvements are the top priorities for transport

– In March 2022, 24% of Australians said that road improvement is the highest priority issue for transport in Australia, up from 19% in September 2022. There are 25% of Australians said public transport improvement has the top priority. Economic and financial problems have increased to 21% from 19% in September 2022 due to higher petrol costs and rising public transport fares.

Opinions on transport in local areas have not improved since September 2022

– In March 2023, 29% of Australians said that transport in their local areas was worse than one year ago, slightly lower than 30% in September 2022. In contrast, only 8% of Australians said that transport in local areas is better than one year ago, down from 10% in September 2022. People with neutral or no opinions have increased from 61% in September 2022 to 63% in March 2023.

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

– In March 2023, 14% of Australians said that transport in their local area would be better in one year, down from 18% in September 2022.

Australians have less confidence in transport in Australia in the short-term

– In March 2023, only 14% of Australians thought that transport in Australia would improve in one year, down from 19% in September 2022. In contrast, 29% of Australians thought that transport in Australia would worsen in one year, up from 24% in September 2022.

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

- In March 2023, 29% of Australians thought that transport in Australia would improve in five years, down from 36% in September 2022. In contrast, 29% of Australians thought that transport in Australia would worsen in five years, up from 23% in September 2022.

ITLS Index of Transport Confidence

- Compared to September 2022, in March 2023, Australians are less confident about transport in their local area (Confidence index: down from 94 to 76). The same is true for transport across Australia in one year (Confidence index: down from 91 to 67) and in five years (Confidence index: down from 96 to 79). Overall, all indexes have decreased significantly compared to September 2022.

About 70% of Australians ordered online in the last four weeks

- About 70% of Australians made online order(s) in the previous four weeks, down from 76% in September 2022. For those who ordered online, the average spending of $370 in the last four weeks is almost identical to $375 in September 2022. They spent 49% on groceries, clothing & apparel (more than 47% in September 2022). Overall, 65% of online spending is delivered to home or other places, slightly less than 67% in September 2022. However, 59% of online grocery shopping is delivered, more than 57% in September 2022. Among the 70% of Australians who made online order(s) in the last four weeks, nearly 30% of total grocery spending was made online, with the remaining 70% of expenditures made in stores.

Working people spend 27% of their work time working from home (WFH)

- Of the 64% of Australians who have undertaken paid work in the last two weeks, they worked an average of 8.08 days. Both figures are almost identical to the figures in September 2022. Of all the working hours, 27% are WFH hours, which increased slightly from 26% in September 2022. Working people in NSW, VIC and QLD spent 27%, 34% and 28% of working hours WFH, respectively. These figures are higher in capital cities, with 31%, 35% and 33% in Sydney, Melbourne and Brisbane, respectively. Professionals and managers work from home more than other occupations, with about three days in the last two weeks WFH. About 88% of people who work from home have made some trips for purposes such as leisure, shopping, or other personal businesses during WFH days. Driving, walking and taking trains are the three top transport modes.

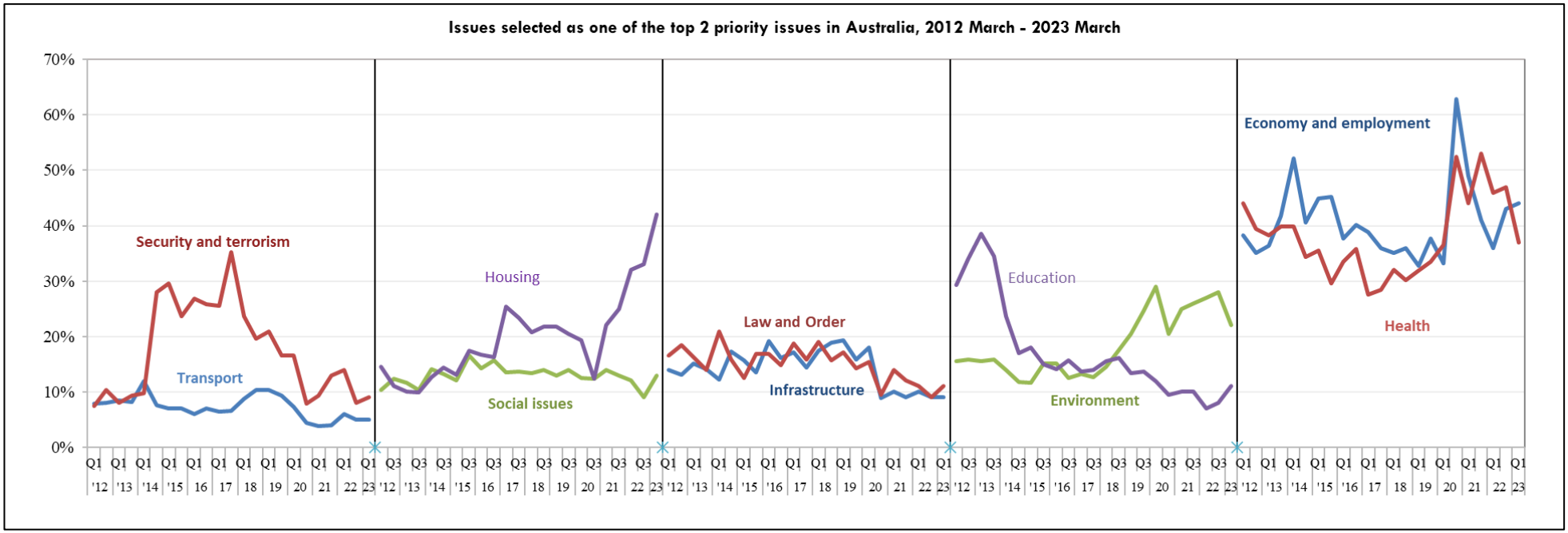
About the Transport Opinion Survey

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 March 2023 survey was conducted between the 1st and 9th of March 2023. This report is based on the data from 1,029 completed responses.

Transport as a national priority

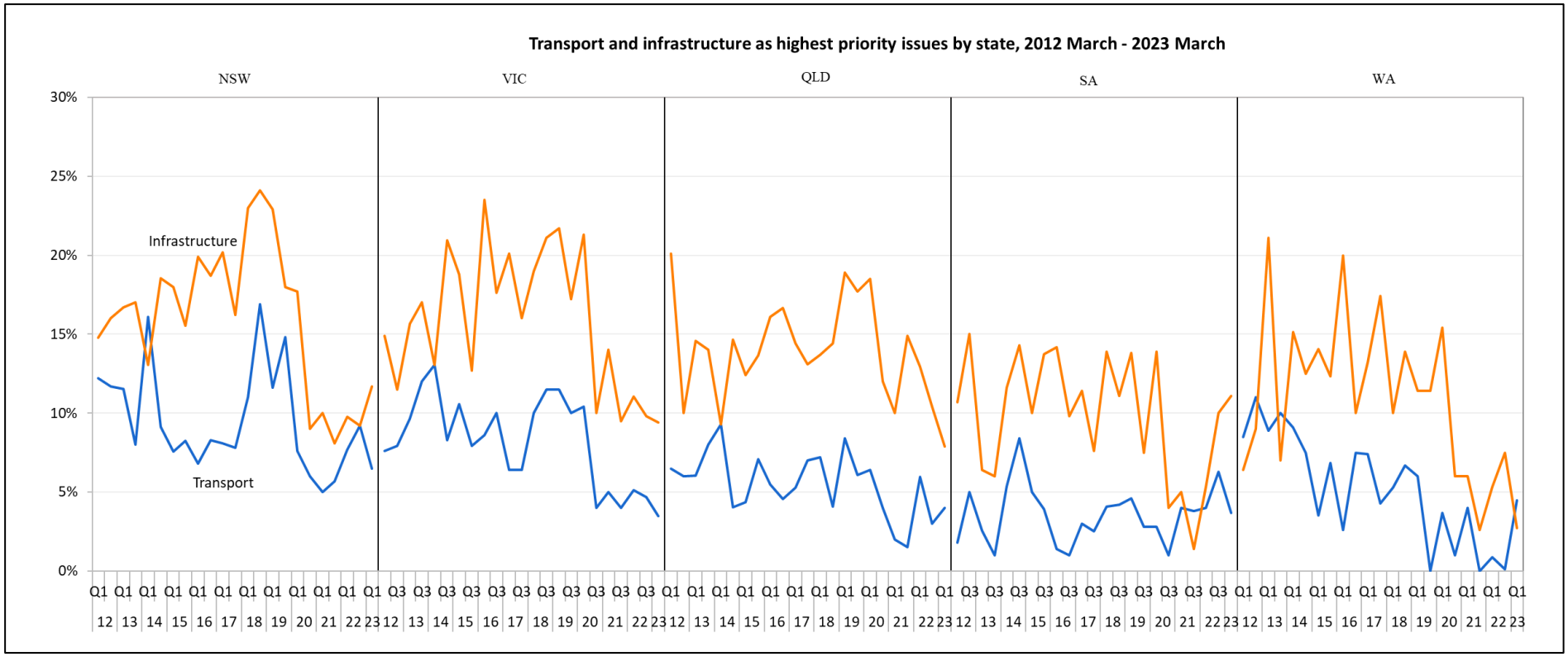
Which two of these issues do you think are the highest priority in Australia today?

- People's opinions on national priorities reflect public views of the soaring cost of living from food, energy, fuel and other items. From May 2022, RBA has increased the official interest rate for ten consecutive months to offset the high inflation. Economy and employment (44%) and housing (42%) are rising as top priorities. Housing has increased from 33% to 42% from the last wave. This finding is unsurprising, given the recent heavy media coverage of these two issues. In contrast, the priority that has decreased most from September 2022 survey is health, down from 47% to 37%. The priority that has fallen second most is the environment, down from 28% to 23%.
- Other priorities, such as transport, social issues, law and order, and education, have either remained at the same level or increased or decreased slightly.
- Housing affordability, as well as availability, have been widely covered in the media. Housing remains a high priority at 42%. 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. Housing concerns will remain a high national priority with higher interest rates, mortgage repayments, high rental costs, and low availability.
- Australians are less concerned about the environment at 23%, down from 28% in September 2022. We don't think this means people have a less environmental concern. Its urgency is less significant than pressing issues such as the cost of living and housing for top priorities.
- 9% of Australians nominated infrastructure, and 5% selected transport as one of Australia's two highest priority issues today, with no change from September 2022.



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 compared to September 2022. In March 2023, 7% of New South Wales residents selected transport as a priority compared to 4% of Victoria residents, 4% of Queensland residents, 4% of South Australia residents and 5% of Western Australia residents. About 12% of New South Wales residents and 11% of South Australia residents selected infrastructure as one of the top two priorities compared to 9% of Victoria residents, 8% of Queensland residents and 3% of Western Australian residents.

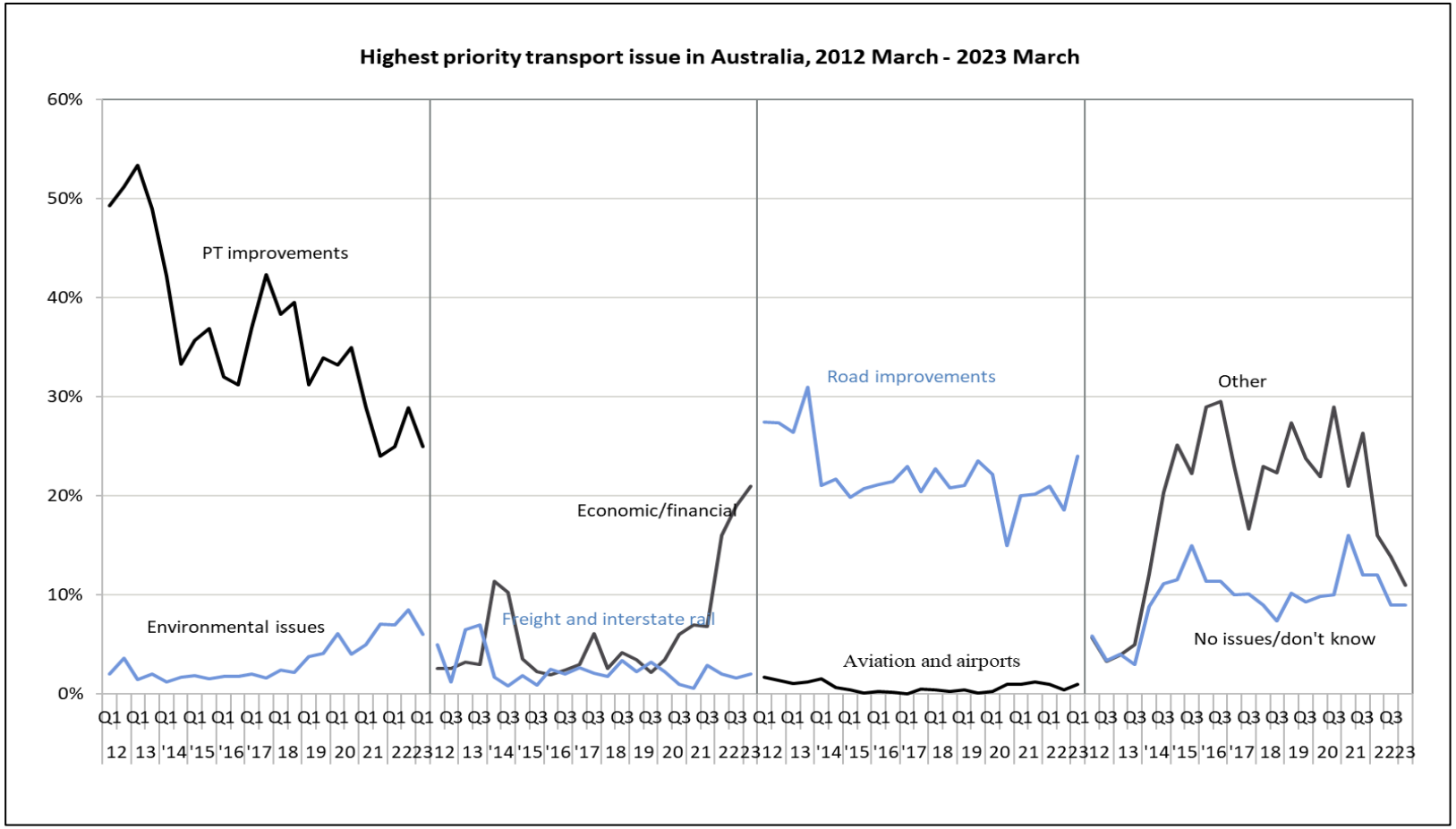


Highest priority issue for transport

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

- In March 2023, 21% of Australians said that the highest priority for transport in Australia is economical and financial issues (up from 19% in September 2022). This priority on the economic and financial issues for transport has never been this high. Before September 2022, the level for this priority was typically below 10%. These two waves have shown that Australians have felt the impact of higher costs in every aspect of their living, including transport. People have repeatedly mentioned high petrol costs, increasing public transport fares and other fees such as toll roads. In March 2022, 24% of Australians said that road improvement is the highest priority issue for transport in Australia, up from 19% in September 2022. There are 25% of Australians said public transport improvement has the top priority. For road improvement, many people cited poor conditions of roads as well as heavy congestion on roads. Some have mentioned more cars and trucks and roads. Public transport improvements are related to the public transport service issues including delays and cancellations in recent months.
- Like the September 2022 wave, people nominated fewer various priorities as "other" priorities, with only 11% classified as other priorities. Hence the percentage of other priorities decreased to 11% from 14% in September 2022. In March 2023, 25% and 24% of Australians nominated public transport and road

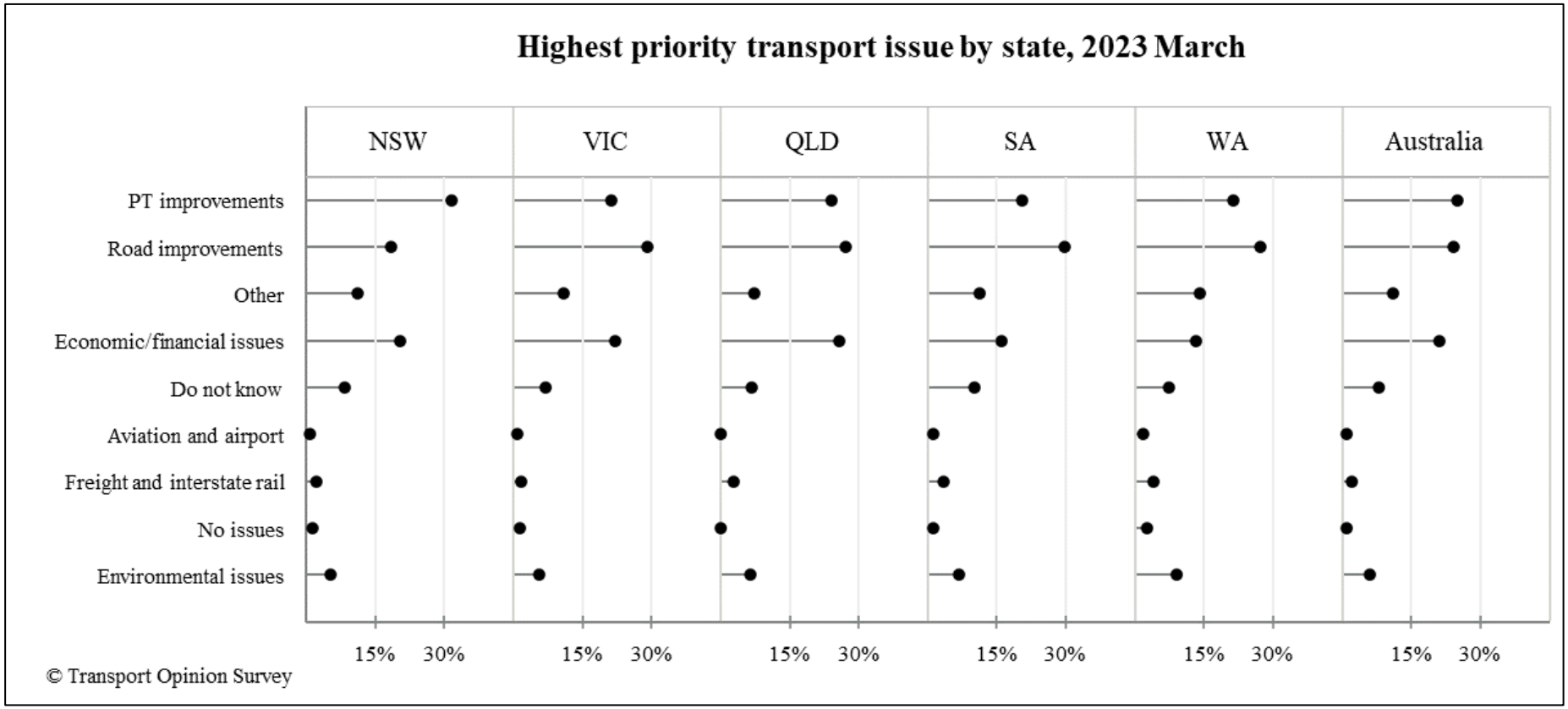
improvements as the priority issue, respectively. Only 6% of Australians selected environmental issues as a top priority for transport, down from 9% in September 2022. Most are related to the transition to electric vehicles and sustainable energy.



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 2023 survey, New South Wales residents consider public transport improvements much more important than road improvements (32% against 18%). Australians in all other states and territories consider road improvements more important than public transport improvements. This is especially true for Victoria residents (29% against 21%) and South Australia residents (30% against 20%). In NSW, many have specifically mentioned the recent cancellation and massive delay of train and bus services due to system failure, industrial disputes and other reasons. The main problems regarding road improvement are related to

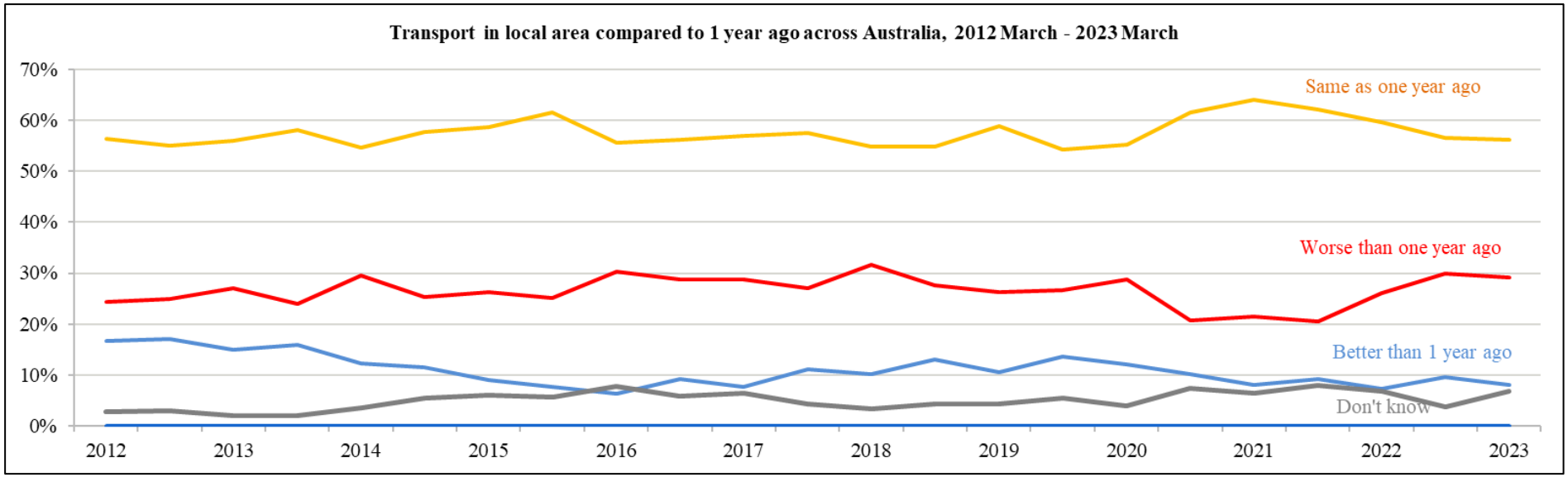
congestion and poor conditions. Economic and financial issues are the second or third highest priority in almost all other states and territories except Western Australia. Many have mentioned the recent soaring costs of petrol. The three most important priorities are public transport improvements, road improvements and economic/financial issues. Australians have more focused priority choices for transport currently.



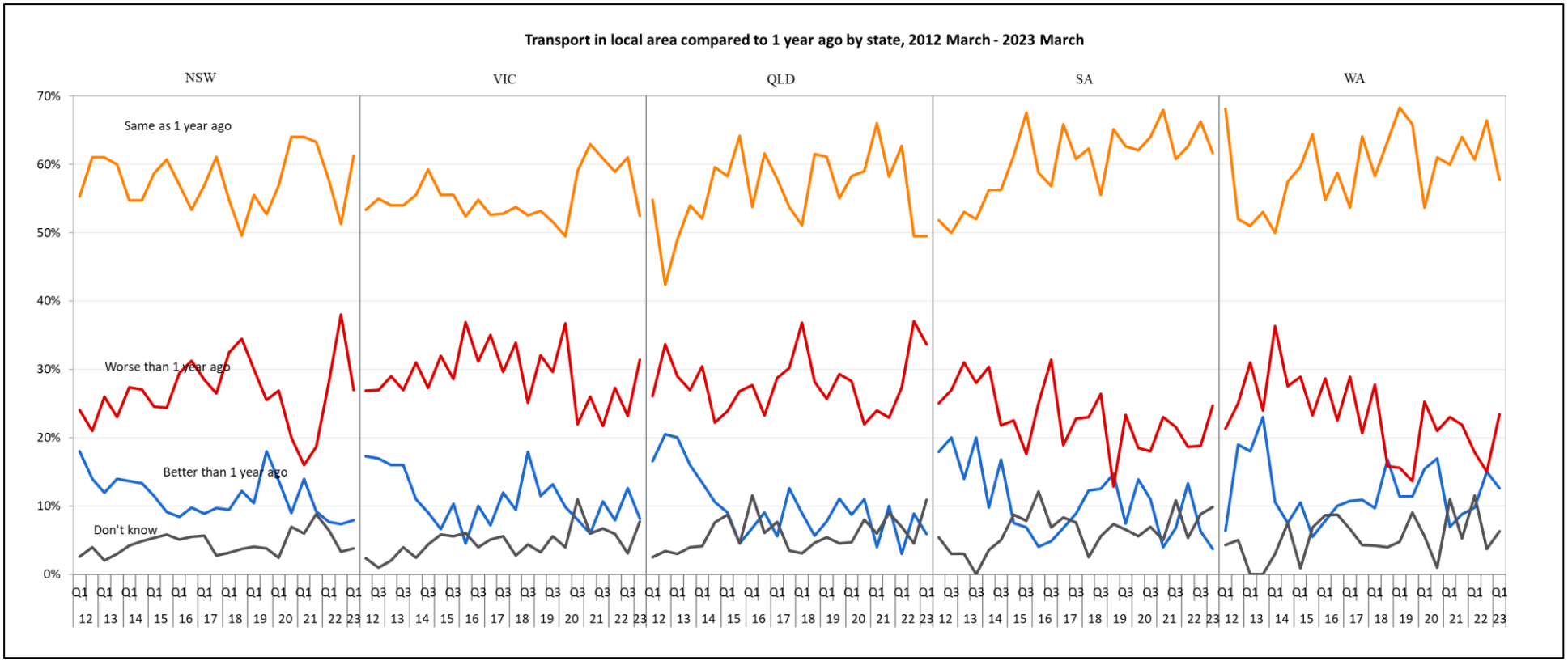
Local transport differs across states and territories

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 March 2023, 29% of Australians believed that transport in their local area was worse than one year ago (down from 30% in September 2022). About 56% of Australians said it is the same as one year ago (down from 57% in September 2022), and 8% of Australians said it is better now than one year ago (down from 10% in September 2022). Those who gave no opinions increased from 4% in September 2022 to 7%, showing that Australians had less certainty in views on this issue.

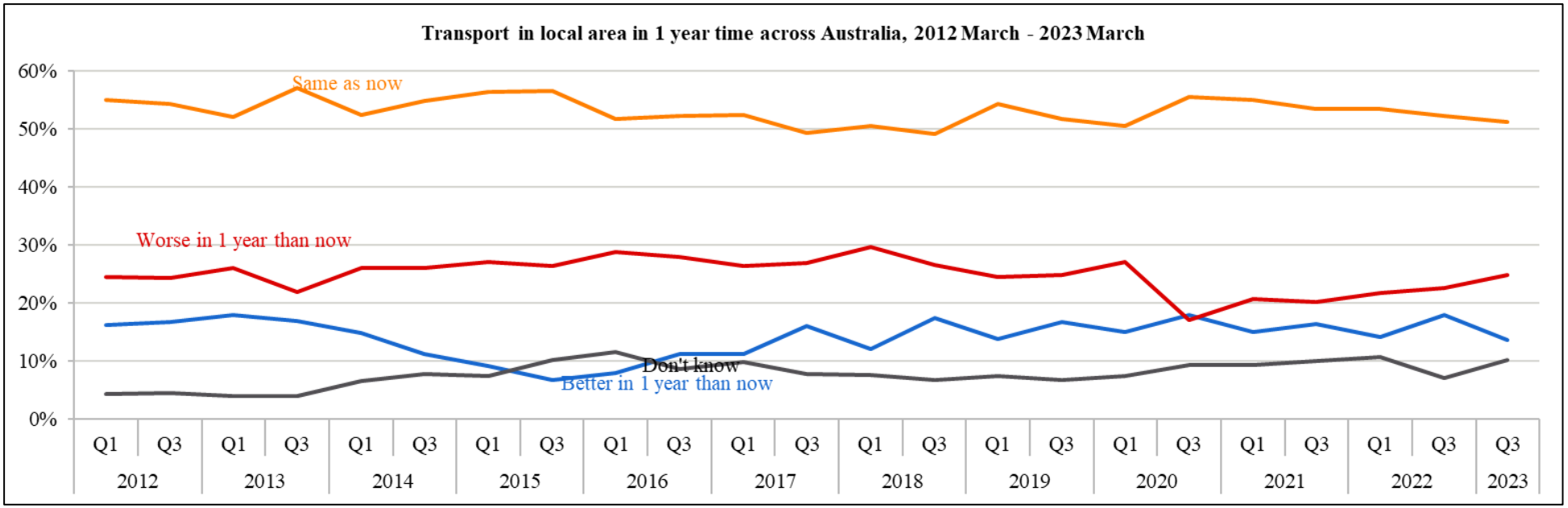


- Respondents' evaluation of transport in the local area is inconsistent across states of Australia. In VIC, 61% of respondents believe the state of transport is better or the same, much lower than 74% in September 2022. In WA, the same number is 71%, a 10% decrease from 81% in September 2022. A similar reduction of the combined positive and neutral opinions was observed in QLD and SA. NSW is the only state with increased combined positive and neutral views at 69%, from 58% in September 2022. In VIC, SA and WA, there is a significant increase in the percentage of people thinking the transport is worse than September 2022. In QLD, the proportion of residents thinking that transport is worse is 34%, down from 37% in September 2022.

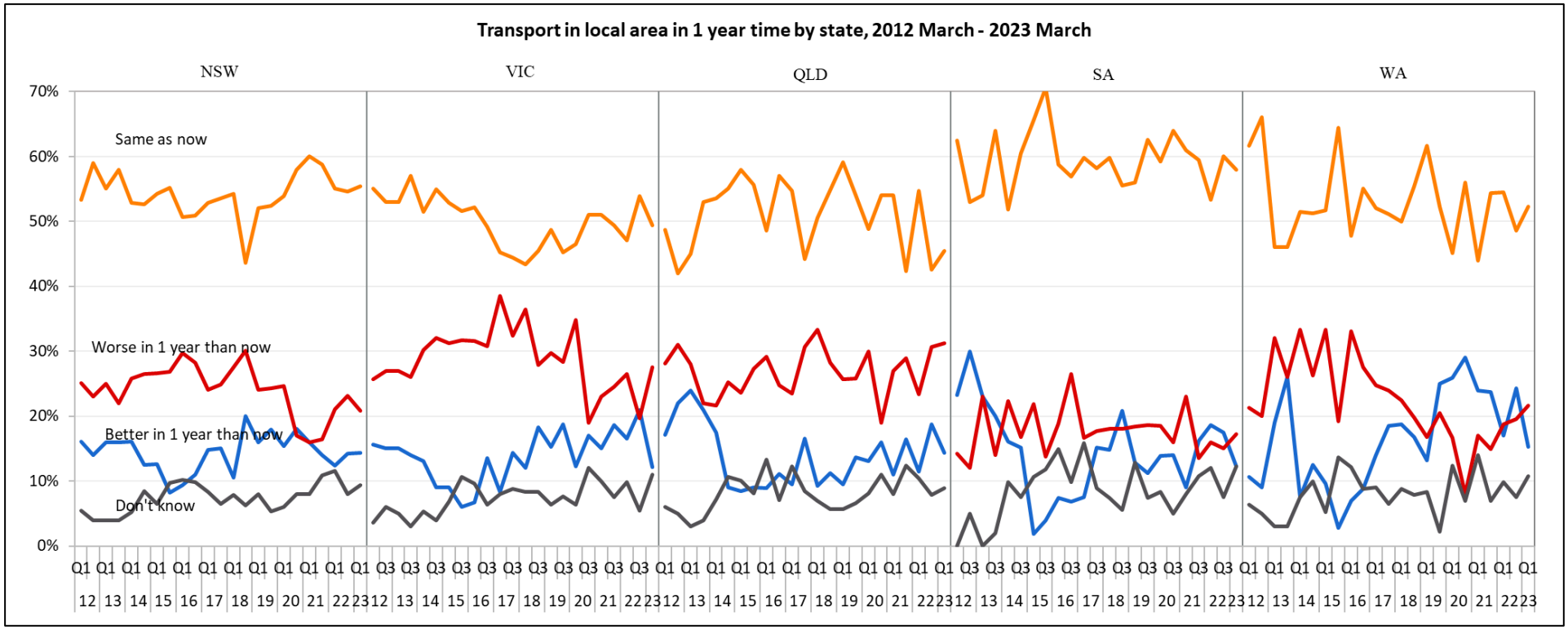


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In March 2023, 51% 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 18% in September 2022, while 25% said transport would be worse, slightly up from 23% in September 2022. About 10% of Australians did not offer their views on this question, up from 7% in September 2022.

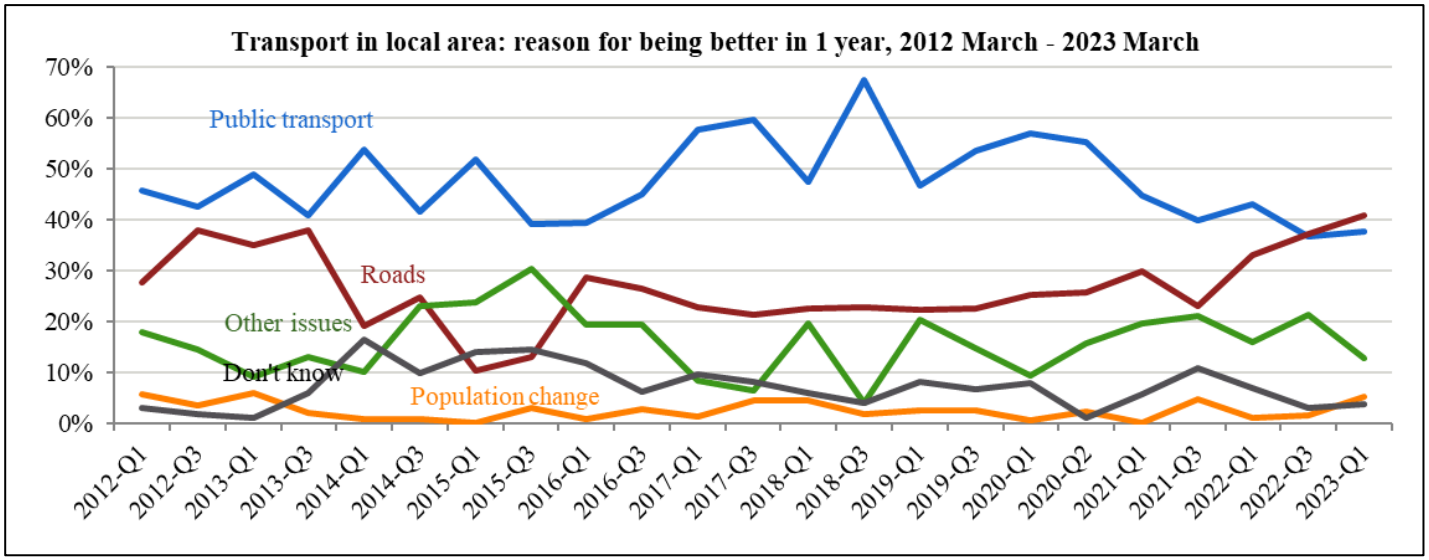


- Australians have responded with less confidence to transport in their local area in most states in one year, with some states showing a big drop in confidence level, such as in VIC. NSW is the only state with almost no change from September 2022. VIC residents had shown much less confidence, shown by those who chose "worse" increased from 20% to 28%, and those who chose "better" decreased from 21% to 12% in March 2023. In QLD, while 14% chose "better in one year's time", down from 19% in September 2022, there was no increase of 31% of those who chose "worse in one year's time". Those who held neutral views by choosing "same in one year's time" have increased from 43% in September 2022 to 46%. Compared to the September 2022 survey figures, less people choose "better in one year's time" in SA (12%, down from 18%). WA residents showed a significant decrease in confidence, with 15% choosing "better in one year's time", down from 24% in September 2022. Across all states, the confidence level is the lowest in VIC and SA, with only 12% choosing "better", compared to a minimum of 14% for the same measure for other states.

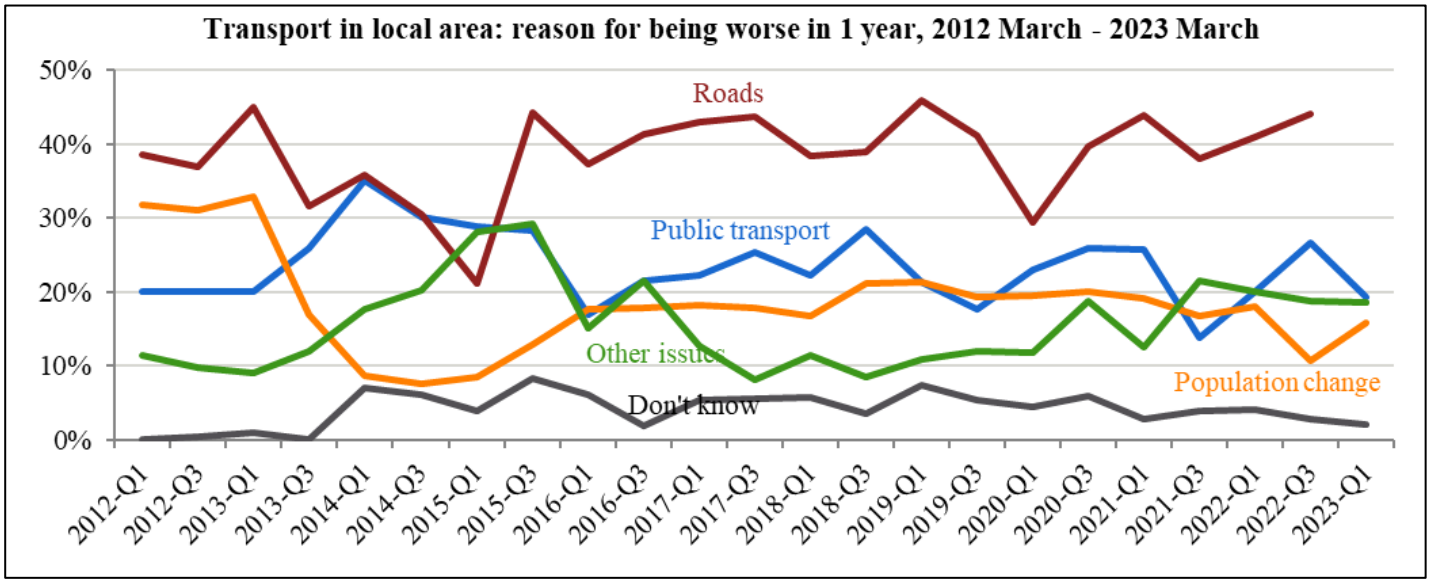


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- The main reasons Australians believe that transport will improve or worsen in the local areas are public transport and road improvements. Public transport service and roads are the main reason residents think their local transport will be better in one year (top figure) at 38% and 41%, respectively. Roads are the biggest reason residents believe that their local transport will be worse (bottom figure) in one year at 44%, up from 41% in September 2022. People mentioned congestion, poor road conditions, trucks on roads and road safety issues 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.



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.

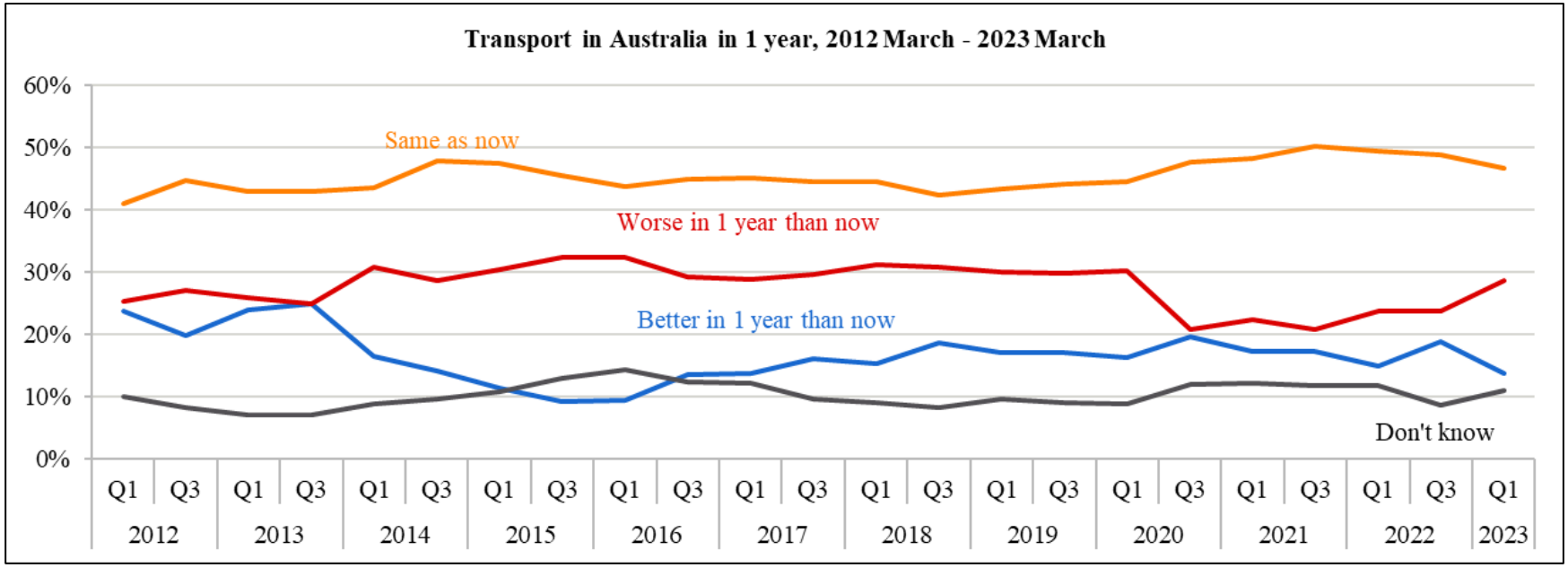


Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, lockdowns, health, border clousure and issues not included in public transport, road and population change categories.

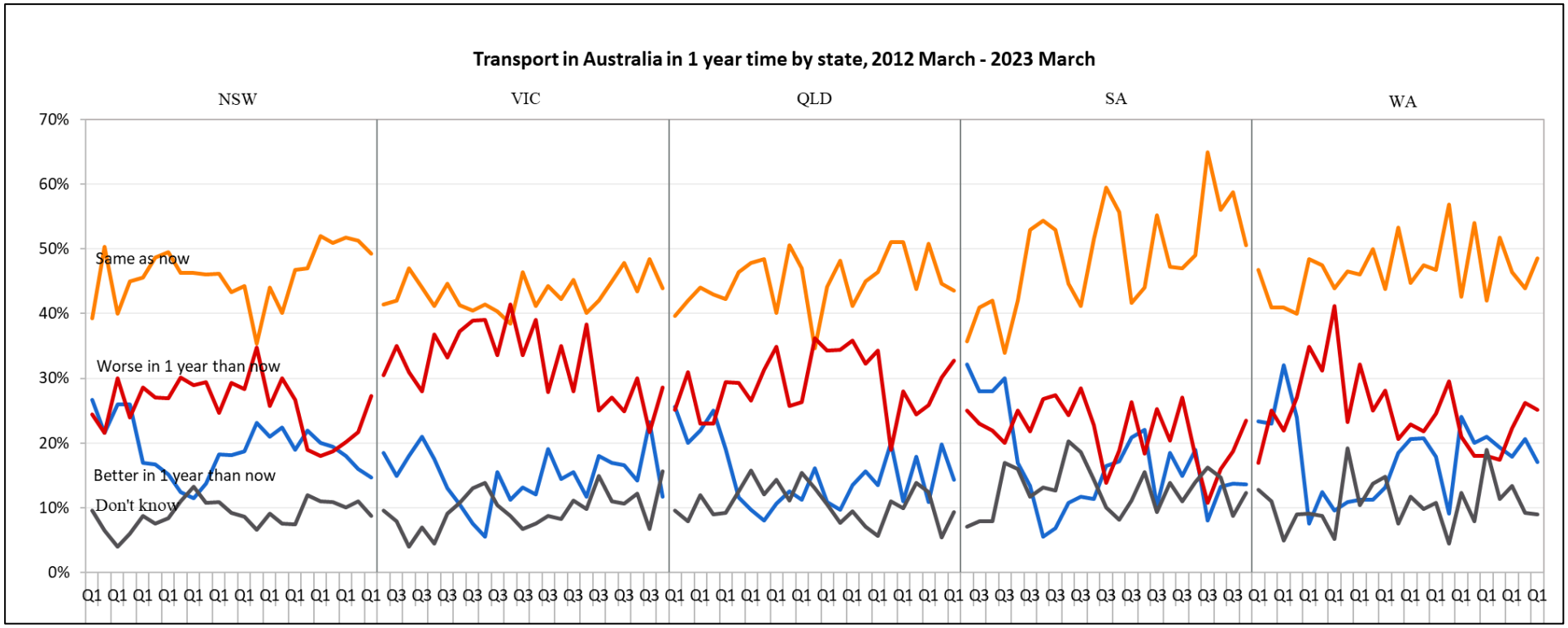
Confidence about transport in Australia becomes better in both short-term and long-term

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 March 2023, 47% of Australians said that the state of transport in Australia in one year's time will be the same as now, with 14% of Australians saying that transport in Australia will be better in one year's time, down from 19% in September 2022. In contrast, 29% of Australians said that the state of transport in Australia in one year's time would get worse, up from 24% in September 2022.

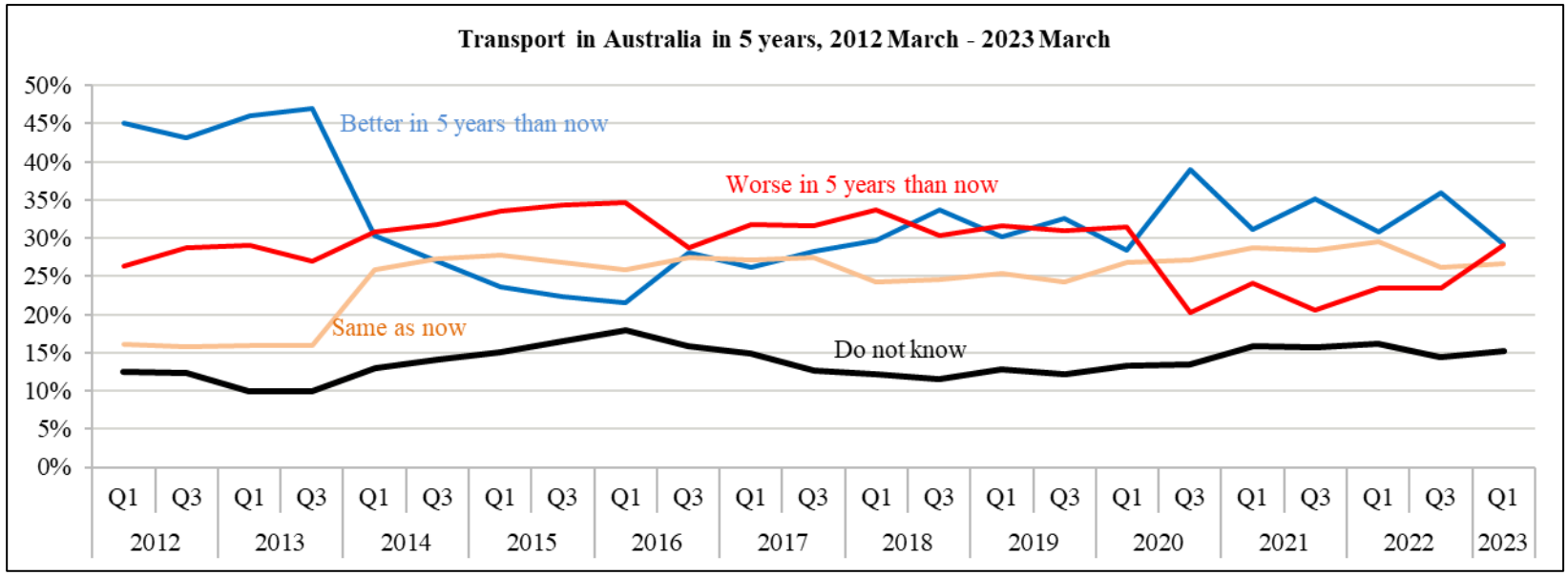


- In March 2023, about 27% of NSW residents said that the state of transport in Australia would worsen in one year, up from 22% in September 2022. Similarly, 29% of VIC residents noted that the state of transport in Australia would be worse in one year, up from 22% in September 2021. The same decrease in public confidence also occurred in QLD, with 14% of QLD residents saying the state of transport in Australia in one year would be better, down from 20% in September 2022. About 24% of SA residents said that the state of transport in Australia would worsen in one year, up from 19% in September 2022. In WA, there has been a decrease in the percentage of residents who believed the state of transport in Australia would become better in one year, by 4% from September 2022. Overall, Australians have less confidence across states about the state of transport in one year's time.

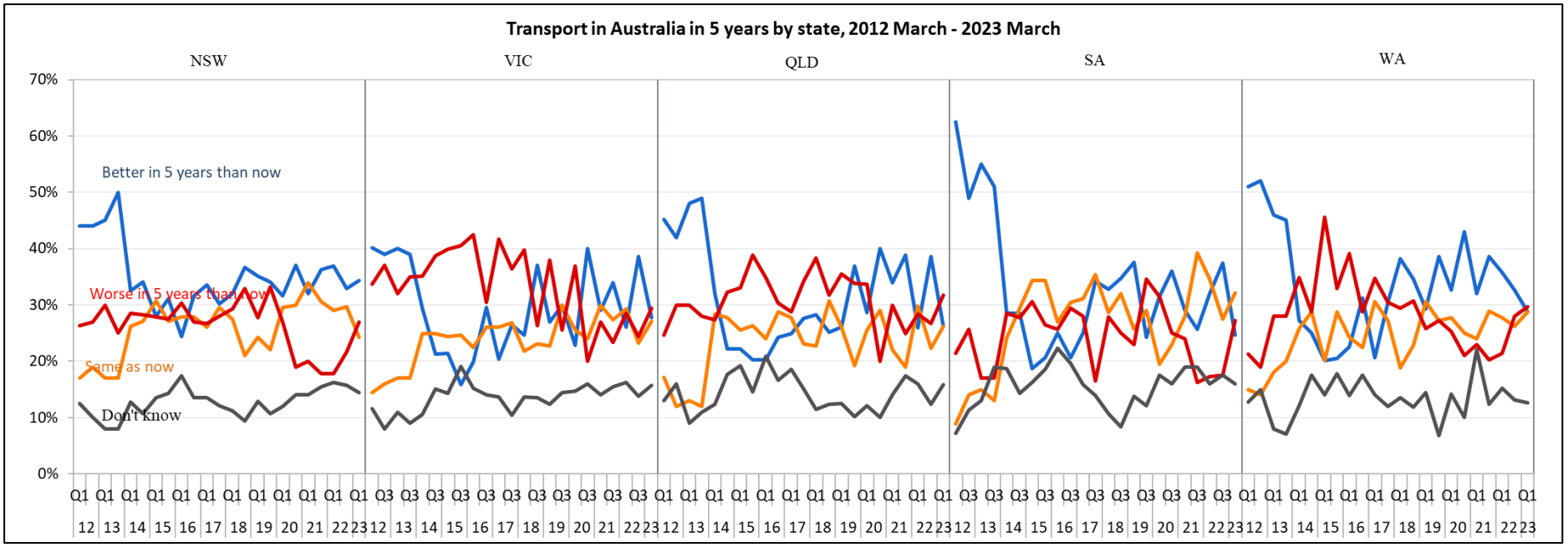


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- Australians are less confident that the state of transport will be better in five years' time than it is now. In March 2023, 29% of Australian residents believed transport in Australia would be better in five years' time, down from 36% in September 2022. People who think that the state of transport in Australia will worsen in five years is at 29%, up from 23% in September 2022.



- Australians across all states are losing long-term confidence about transport, especially in VIC, QLD and SA, which are the same states gaining the most long-term confidence in September 2022. In March 2023, the proportions of Australian residents who believe Australia's transport will be better in five years have all decreased except in NSW, with an 11% decrease in VIC, a 13% decrease in QLD and SA, and a 4% decrease in WA. The proportions of Australian residents who believe Australia's transport will be worse in five years have all increased in every state, with a 5% increase in NSW, VIC and QLD, a 9% increase in SA and a 2% increase in WA. Possibly slightly better news is that in every state except NSW, the proportion of Australians who believe transport will remain the same has all increased by about 3% to 5%. However, there is no question that Australians have less long-term confidence about transport overall.



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.

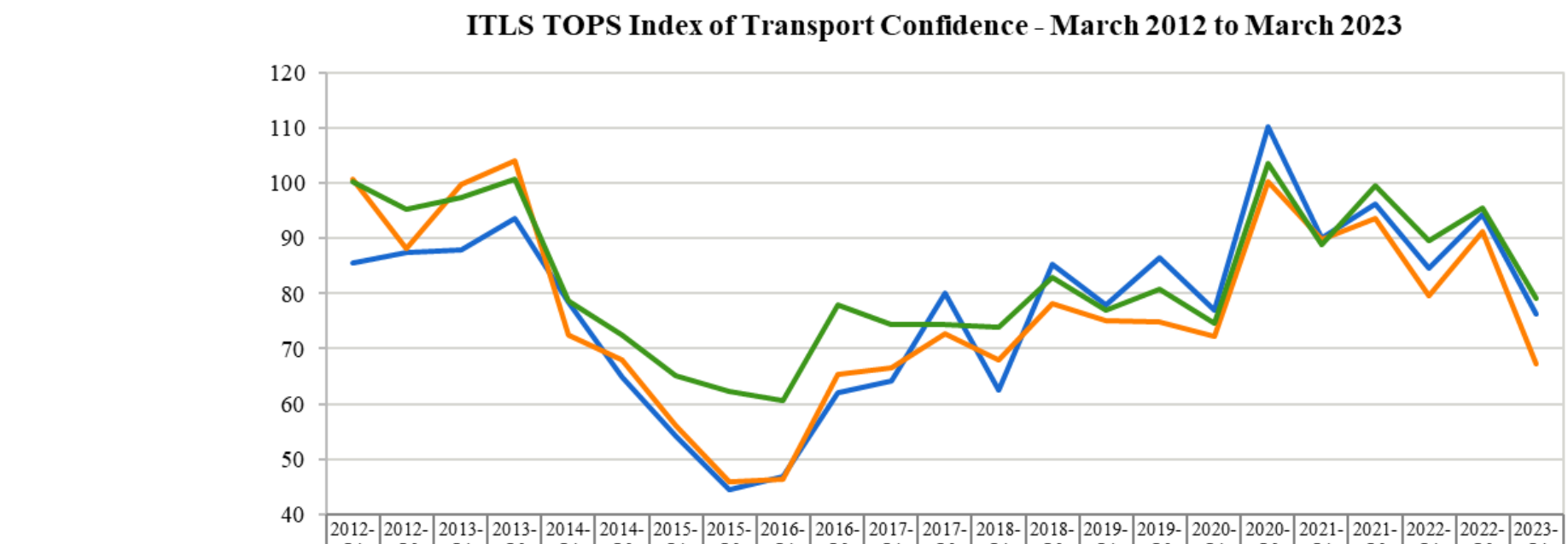
A TOPS Index value of more than 100 means that Australians' confidence about the state of transport getting better is more substantial relative to March 2010. A TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2023 quarter, as compared to March 2022 (one year earlier):

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

We cannot underestimate the significant impact of factors, including high inflation and the soaring cost of living, 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 2023 (Confidence index: from 100 to 76) and in Australia in the next year (Confidence index: from 100 to 67) and are less confident about improvements in transport in Australia in five years' time (Confidence index: from 100 to 79). There has been a significant decline in confidence since September 2022, showing Australians are

less confident about future enhancements in transport. People have gone through many challenges in the recent half year and are still under the impact of 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 increased cost of living, will continue to impact transport this year. We will see whether there will be a turning tide in the September 2023 survey.

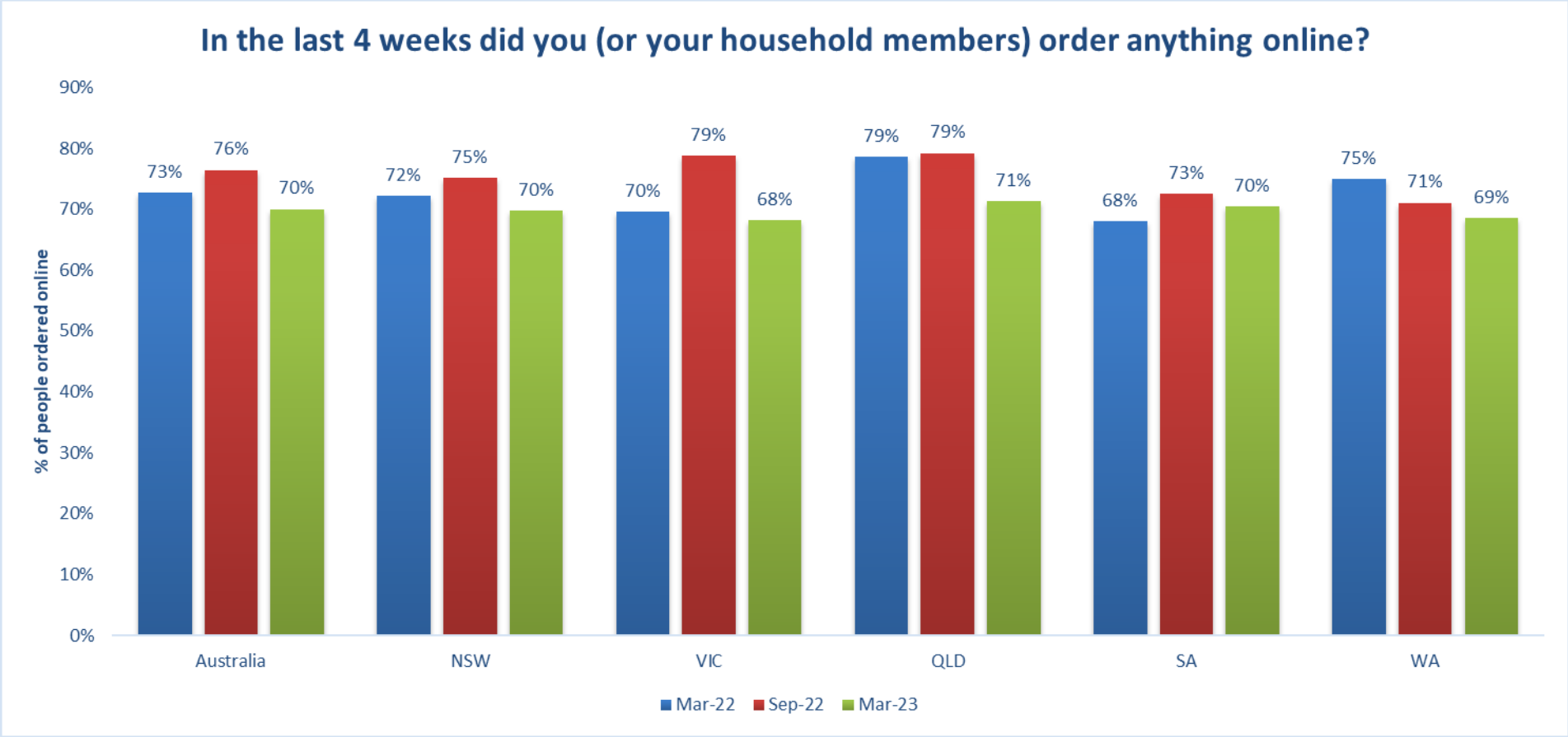


	2012-Q1	2012-Q3	2013-Q1	2013-Q3	2014-Q1	2014-Q3	2015-Q1	2015-Q3	2016-Q1	2016-Q3	2017-Q1	2017-Q3	2018-Q1	2018-Q3	2019-Q1	2019-Q3	2020-Q1	2020-Q3	2021-Q1	2021-Q3	2022-Q1	2022-Q3	2023-Q1
Transport in local area in 1 year	86	87	88	94	78	65	54	44	47	62	64	80	63	85	78	87	77	110	90	96	84	94	76
Transport in Australia in 1 year	101	88	100	104	73	68	56	46	46	65	66	73	68	78	75	75	72	100	90	94	80	91	67
Transport in Australia in 5 years	100	95	97	101	79	72	65	62	61	78	74	74	74	83	77	81	75	104	89	100	89	96	79

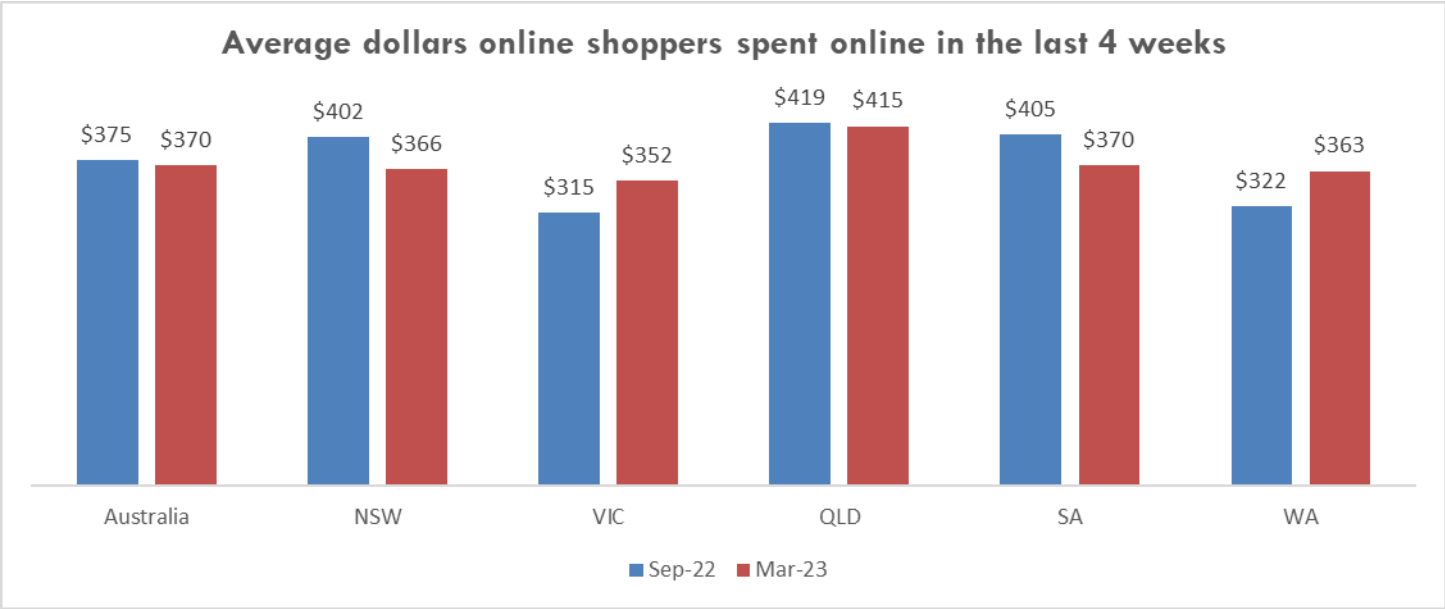
Supplementary questions in March 2023

Online shopping, total & category spending, and delivery and collecting

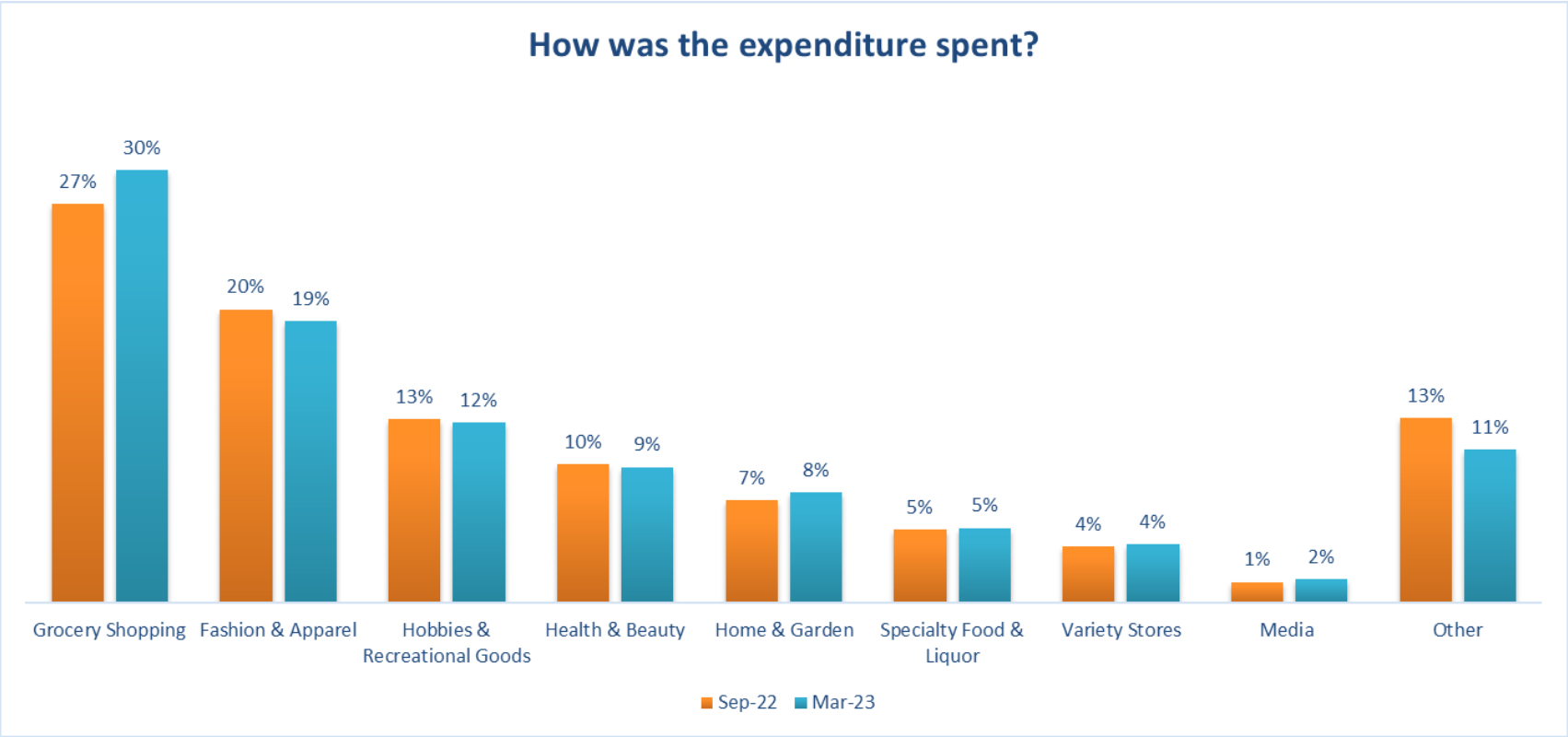
– Fewer Australians shop online compared to September 2022. However, 70% of Australians still shopped online over the last four weeks.



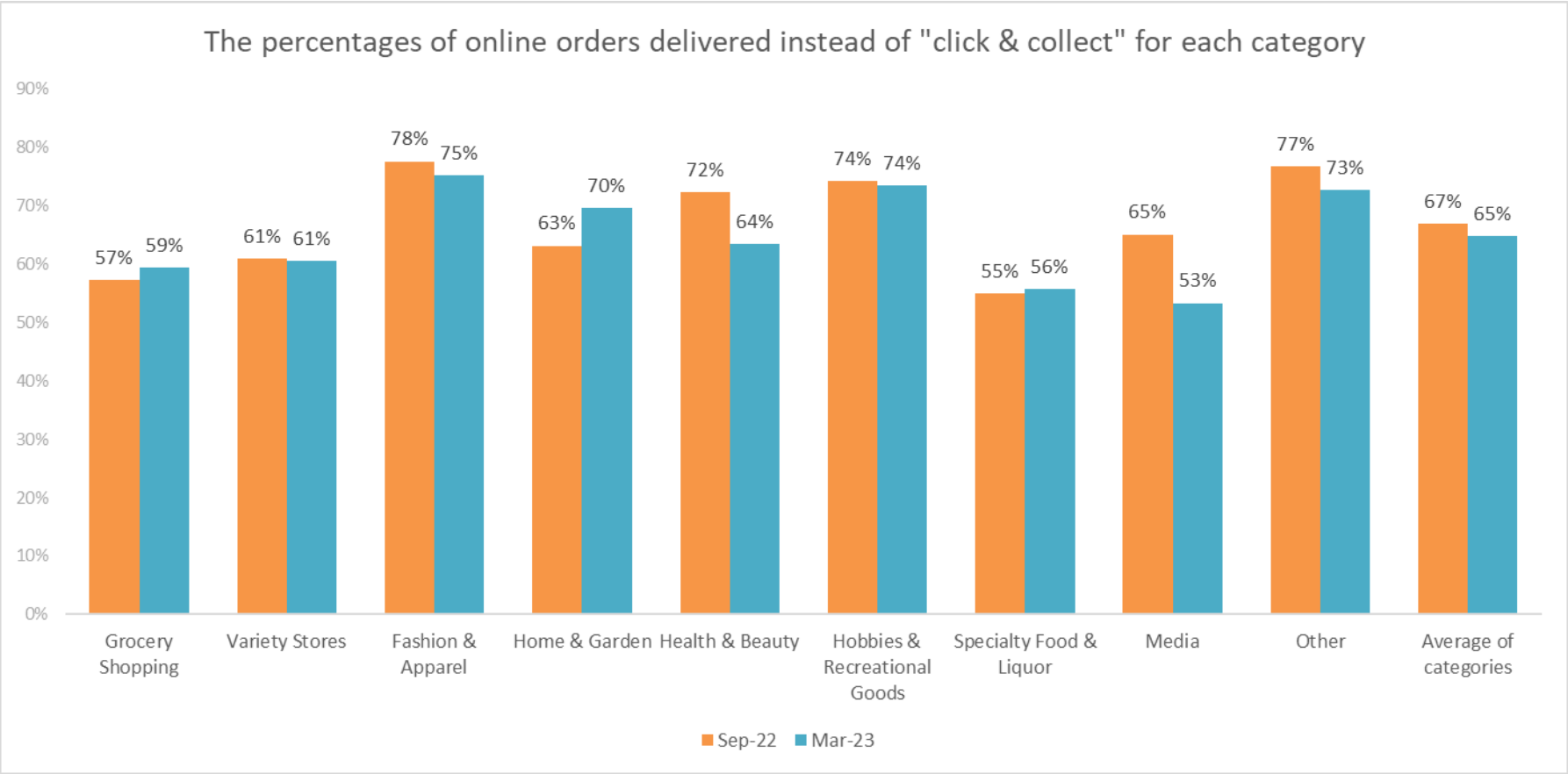
As shown in the graph below, online shoppers in Australia spent about $370 on average in the last four weeks, almost identical to September 2022. Online shoppers in QLD, SA and NSW spent the highest amounts, averaging $415, $370 and $366 in four weeks, respectively. In VIC and WA, the average amounts spent online have increased by about $40, even though the average amounts spent are slightly lower than the other three states.



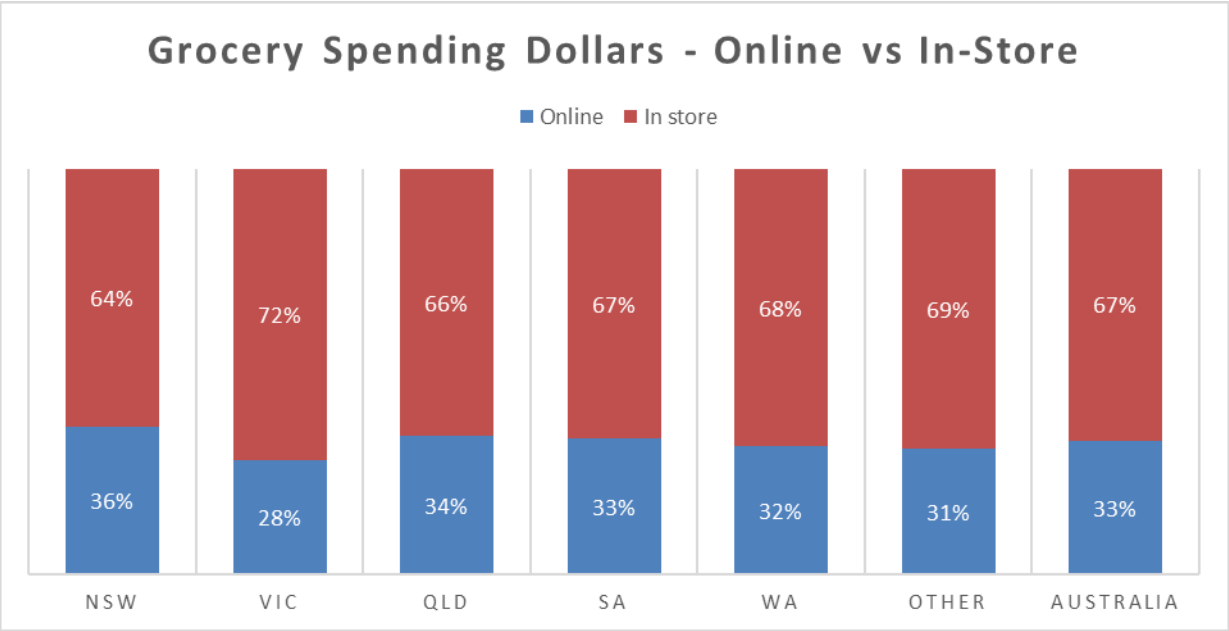
As shown in the graph below, of all the categories Australians purchased online, grocery shopping is the largest online shopping category, accounting for about 30% of total online spending, which increased from 27% in September 2022. Fashion/apparel ranks second in total online spending, contributing 19% of online spending. These two categories are followed by spending online on hobbies and recreational goods (12%), health and beauty products (9%) and home and garden products (8%). Together these five categories account for 78% of the total online spending, almost identical to September 2022.



Due to the distribution channels and products ordered, online shoppers have different delivery needs across categories. For example, retailers are more likely to have physical stores and outlets for grocery goods, specialty food and liquors, variety stores and home and garden products. Shoppers ordered and collected around 30% to 44% of the purchased goods, and 56% to 70% were delivered. 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 who do not have a store outlet. 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 than grocery categories.

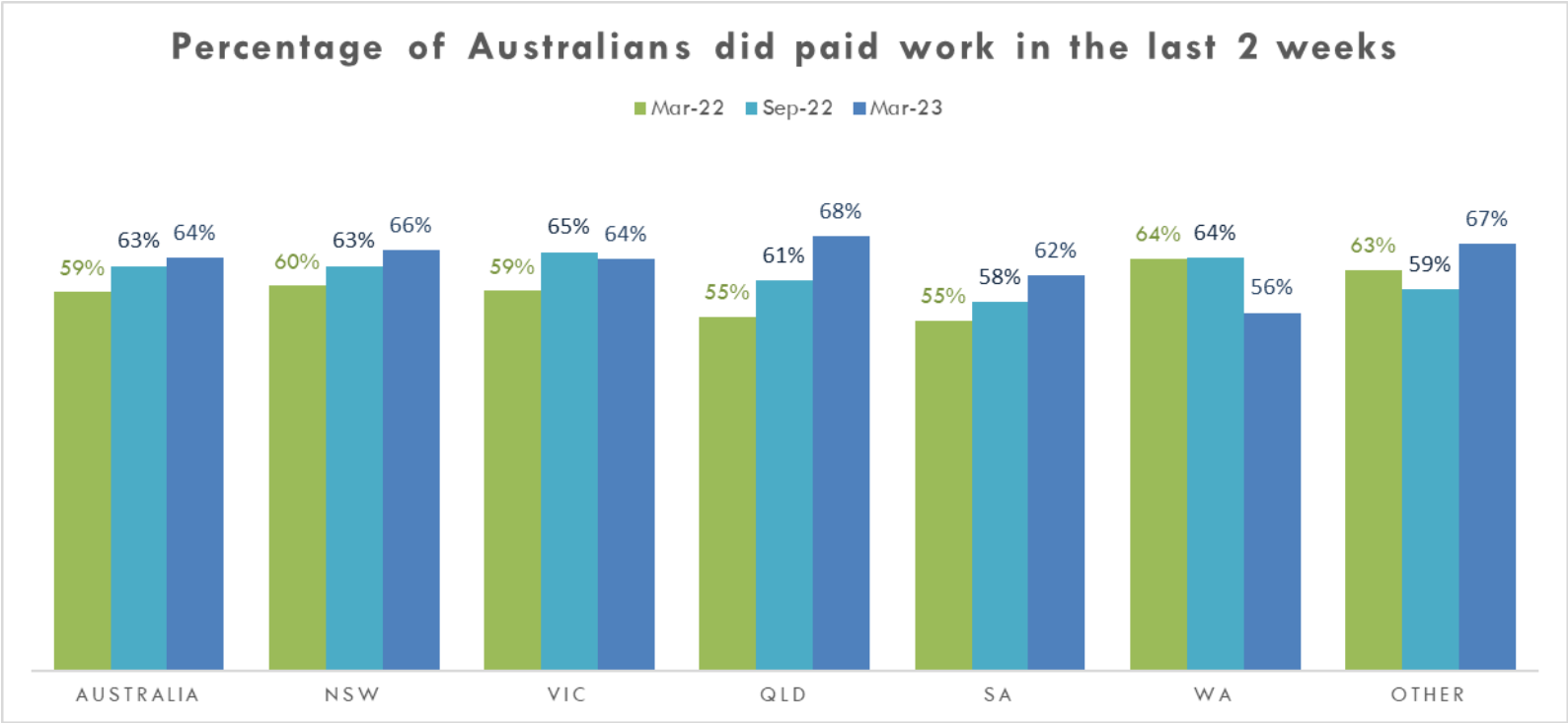


As the biggest online shopping category (30% of the total online spending), online grocery shopping also accounts for 33% of the total grocery spending for online shoppers. About 67% of total grocery spending is in-store shopping. There are no significant differences across different states as shown in the graph below. Online shoppers in every state spent 28% to 36% of total grocery expenditures online, with NSW as the highest at 36%.

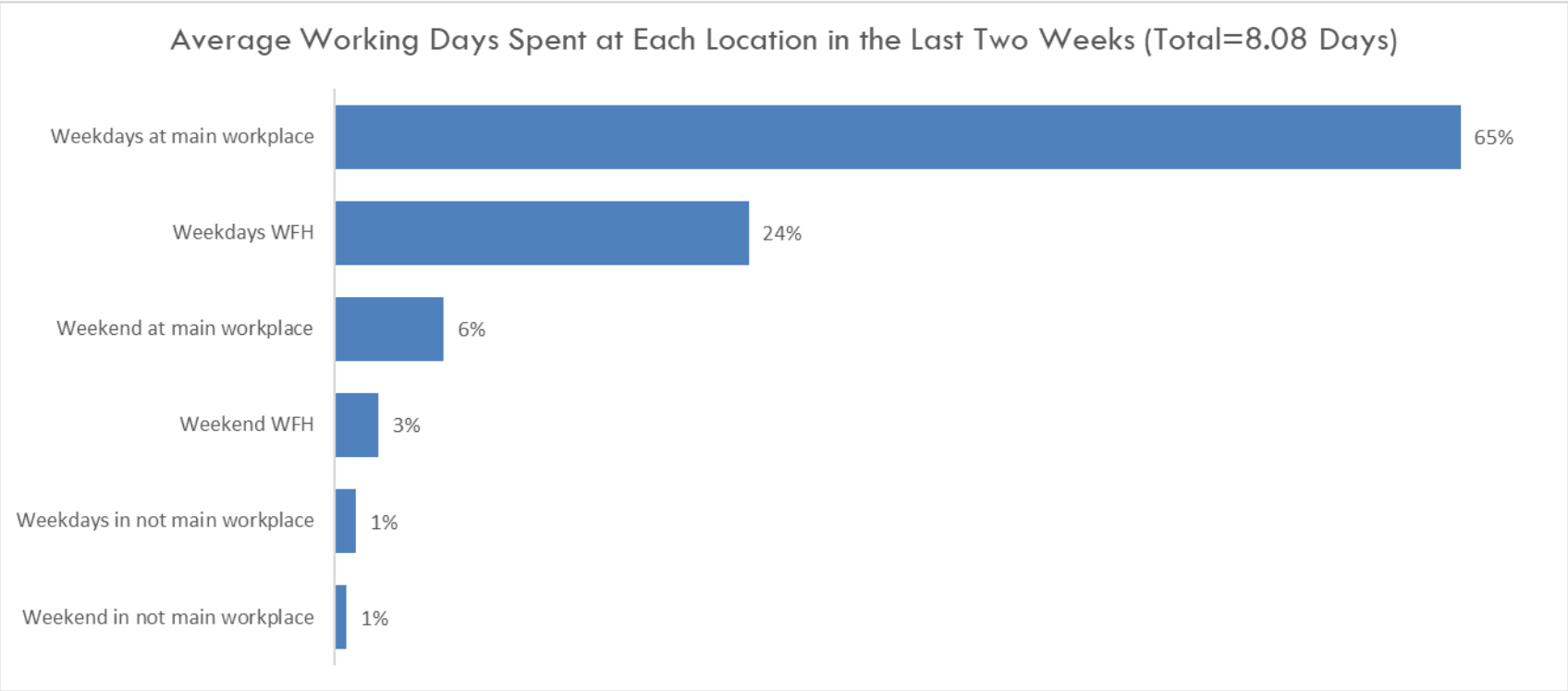


Working from home

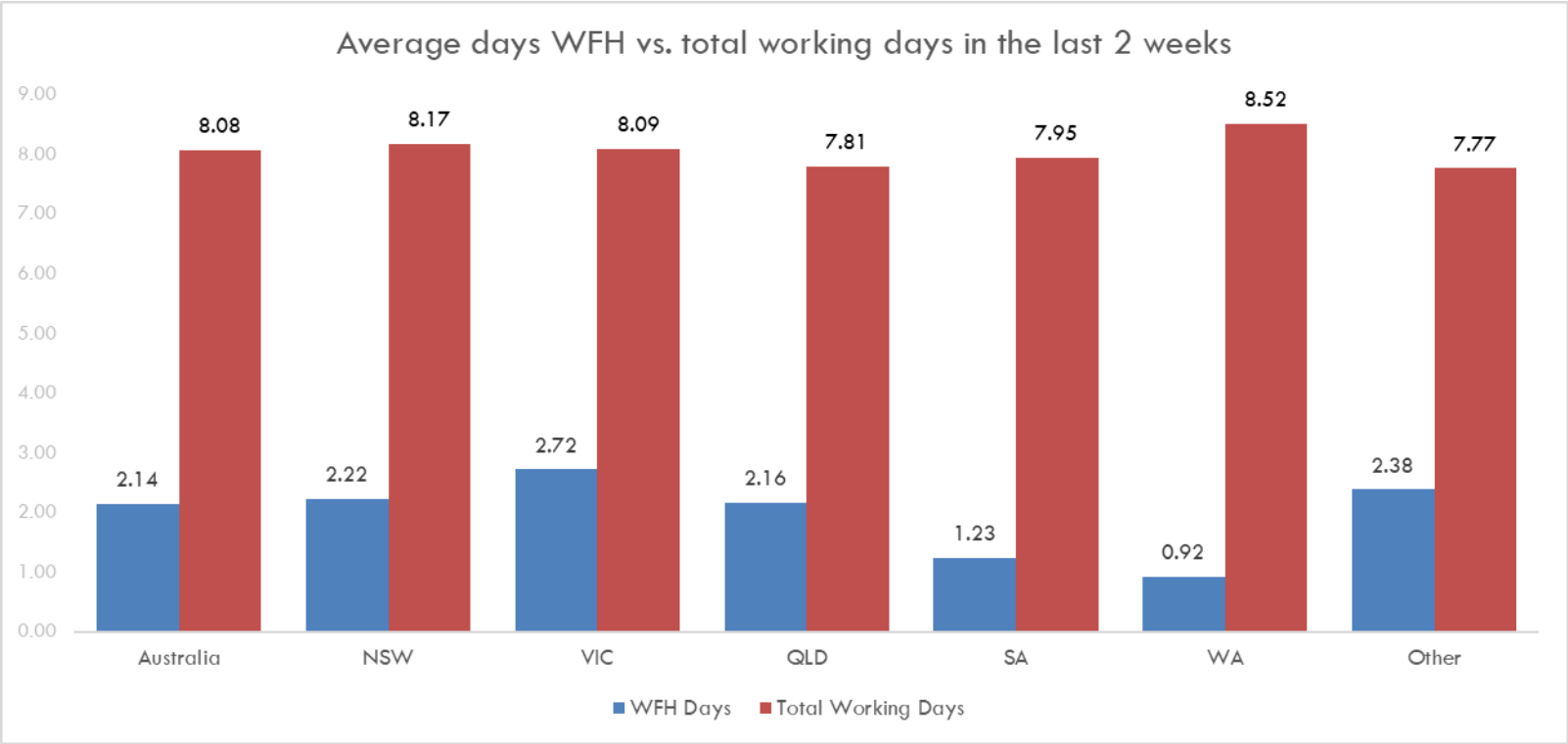
We asked respondents how many days they did paid work in the last two weeks. Given the fluctuating working hours for different employment arrangements such as part-time, casual, contract, and multiple jobs, we used two weeks to allow for flexibility. As shown in the graph below, compared to the result for this question for September 2022 at 63%, a slightly higher proportion (virtually the same) of 64% of Australians has undertaken paid work during the last two weeks. Queensland and ACT/NT/TAS have the highest level of increase at 7% and 8%, respectively.



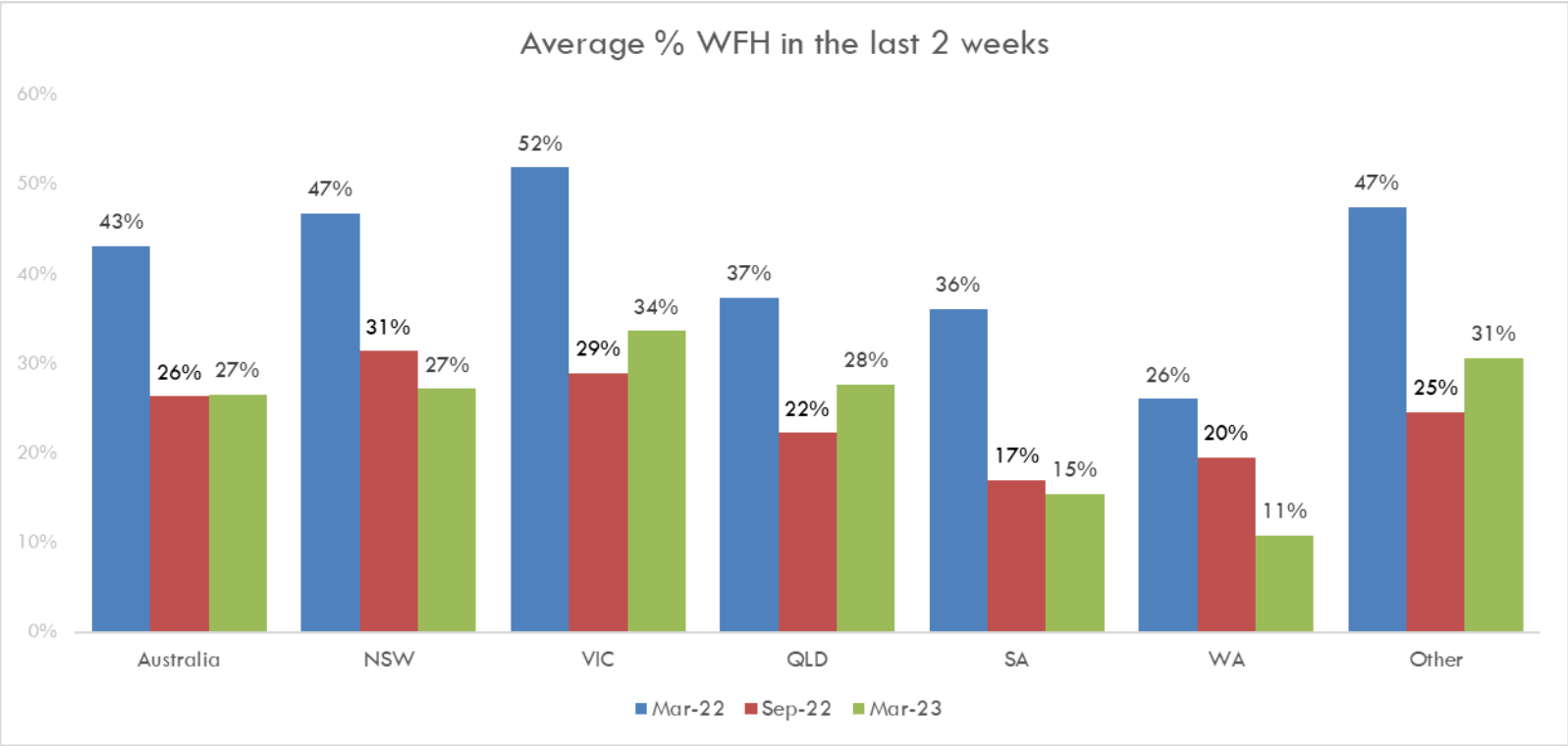
As shown in the graph below, Australians undertook an average of 8.08 days of paid work during the last two weeks, with 27% of the working days from home, including weekdays and weekends, increasing from 26% in September 2022. Most working hours are spent at the main workplace, with 65% and 6% recorded for weekdays and weekends respectively. People undertook about 2% of working hours outside the main workplace and home, at an alternative workplace such as a satellite office, cafe, or library close to home. This number is down from 4% in September 2022. The working population have chosen either the main workplace or home as the workplace, and this trend is becoming stable. This raises an important question about the future of satellite offices and working near home (WNH).



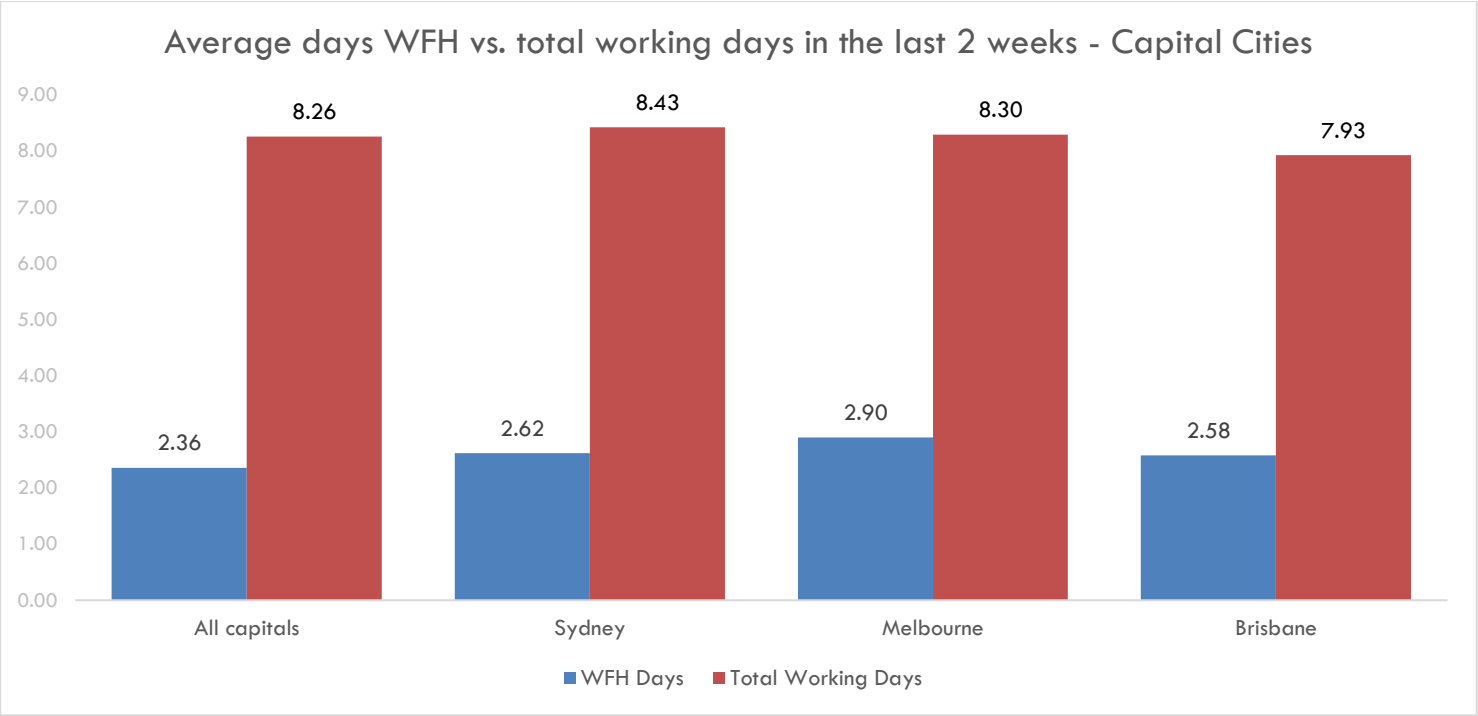
The graph below shows the total working days and WFH days in the last two weeks in each state and territory. Among the average of 8.08 working days during the last two weeks, working Australians spent 2.14 days (or 27%) working from home (WFH). In the five main states of NSW, VIC, QLD, SA and WA, VIC has the highest proportion of WFH at 34% or 2.72 days, followed by QLD and NSW. Among these five states, workers in NSW and VIC spent the longest working from home days at 2.72 and 2.22 days.



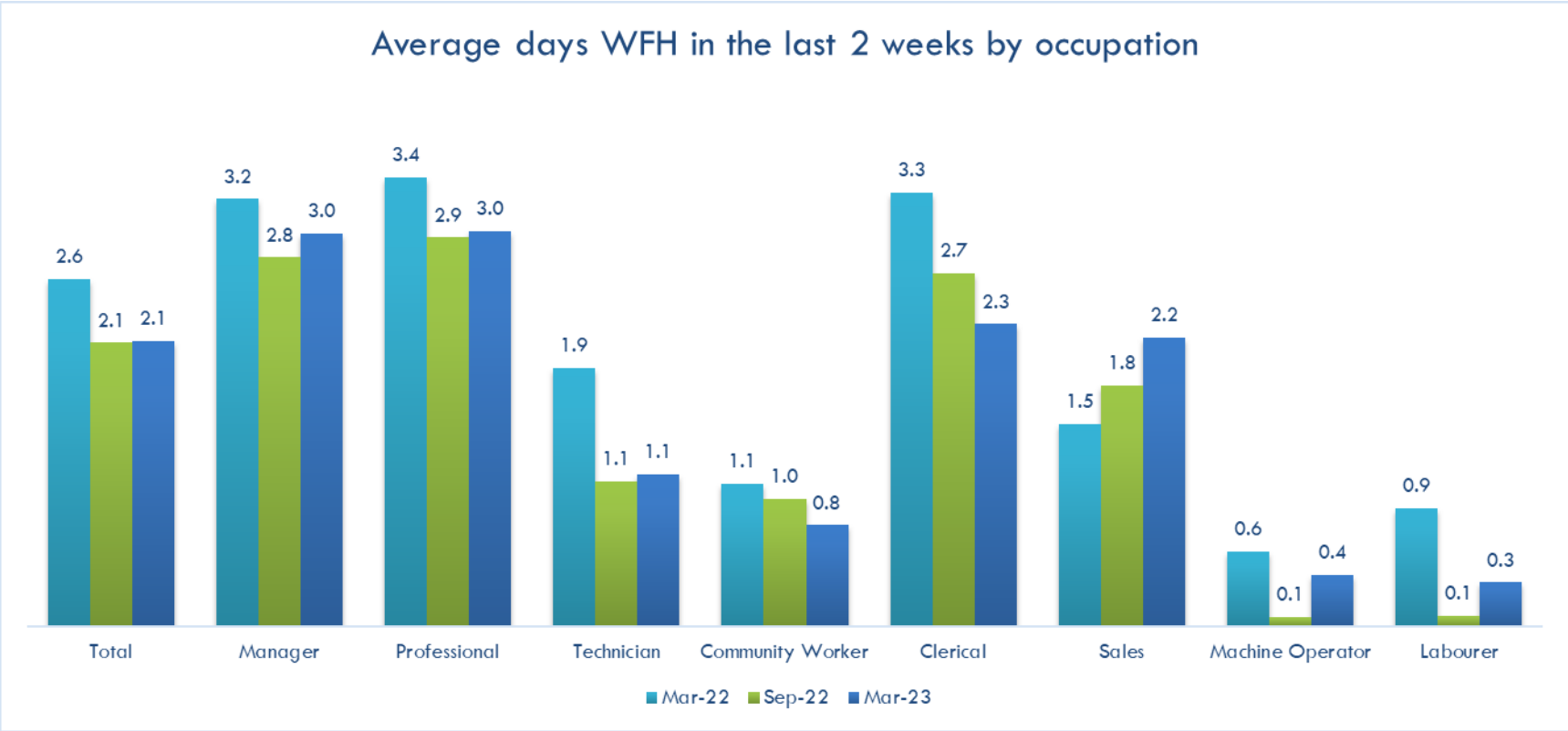
The graph below shows the percentages of WFH days out of the total working days in the last two weeks in each state and territory.



In the capital cities of Sydney, Melbourne and Brisbane, where the survey has a bigger and more representative sample base, workers in Melbourne work most from home, with 2.9 days in the last two weeks. This number is higher than the state average of 2.72 days. Similar patterns apply to NSW and QLD. Workers in Sydney and Brisbane spent an average of 2.62 and 2.58 days working from home, respectively. As expected, these numbers are both higher than the state average (shown in the graph below).

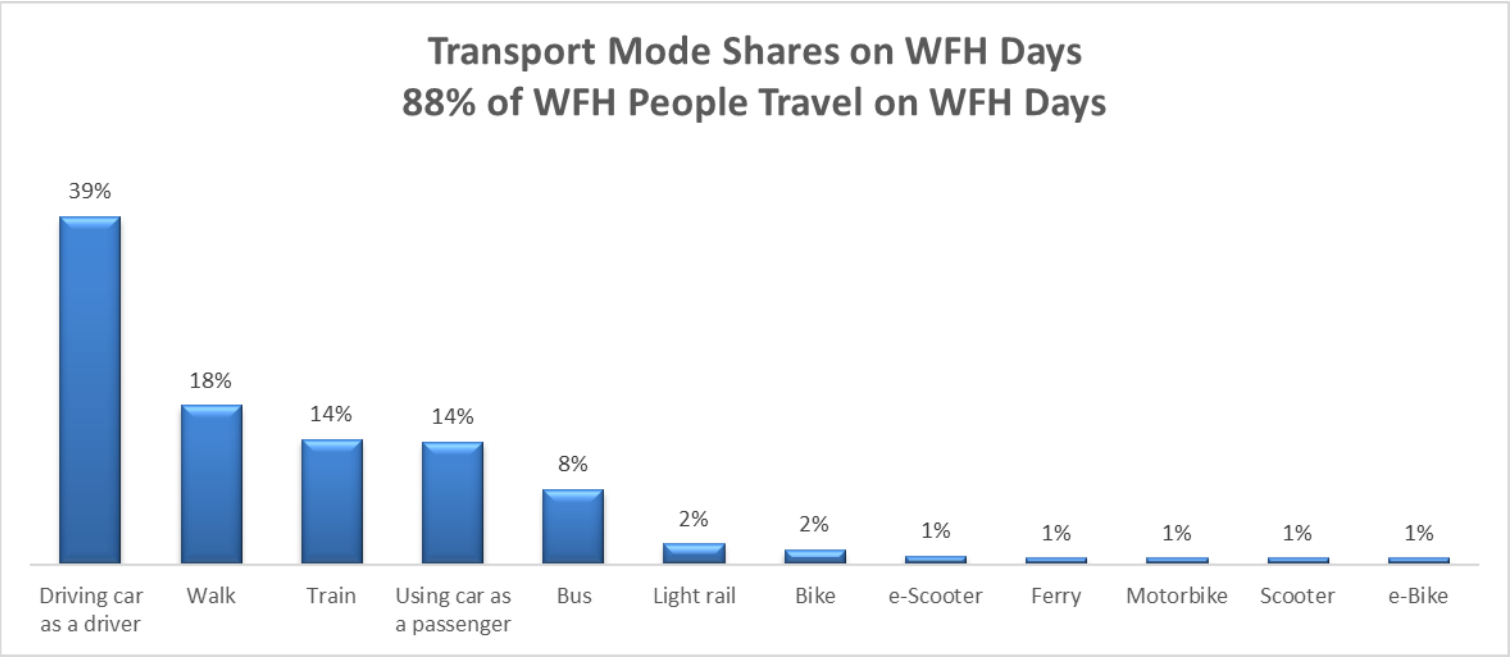


Comparing the results for September 2022, we found almost all occupations have worked at a similar level from home in March 2023. As shown in the graph below, Managers and professionals continue to work with the highest number of days from home, with 3 days in the last two weeks. Community workers and clerical and administrative workers worked from home for 0.8 and 2.3 days, respectively. Machine operators and labourers have returned to their main workplace since September 2022, given that their jobs are predominantly done on-site. Other occupations, such as technicians or sales workers, worked more or at the same levels as in September 2022.



– About 88% of people who work from home have made some trips during WFH days. Driving, walking and taking trains are the three top transport modes.

As shown in the following charts, we asked those who work from home a new question: "On the days you worked from home in the last two weeks, which transport modes did you take for other purposes such as leisure, shopping, or other personal businesses?" The graph below shows that most of them used a car, with 39% as a driver and 14% as a passenger. These are followed by walking (18%), taking a train (14%) and taking a bus (8%). Other modes have a low usage with 2% or below shares.


Transport Mode Shares on WFH Days
88% of WFH People Travel on WFH Days
39%
18%
14%
14%
8%
2%
2%
1%
1%
1%
1%
1%
Driving car as a driver
Walk
Train
Using car as a passenger
Bus
Light rail
Bike
e-Scooter
Ferry
Motorbike
Scooter
e-Bike

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

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

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