



THE UNIVERSITY OF  
**SYDNEY**  
—  
Business School

# Transport Opinion Survey (TOPS)

September 2021

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

# Highlights

**Note: This survey was conducted in September 2021. Both NSW and VIC were in strict Covid-19 lockdown. The lockdown has no negative impact on Australians' confidence in transport improvements but shifted attention to other priorities mainly related to health issues.**

## **Infrastructure and transport slightly decreased as the highest priority national issue**

- In September 2021, 9% of Australians nominated infrastructure as one of Australia's two highest priority issues today, down from 10% in March 2021. In September 2021, 4% of Australians selected transport as one of Australia's two highest priority issues today, identical to 4% in March 2021.

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

- In September 2021, 24% of Australians said that the highest priority issue for transport in Australia is public transport improvements, down from 29% in March 2021. Other issues (26%) related to matters such as lockdown are the top priority, and road improvements ranked third (20%, identical to March 2021). 11% of Australians were unsure of the highest priority, down from 14% in March 2020.

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

- In September 2021, 62% of Australians said that transport in their local areas is the same as one year ago, slightly down from 64% in March 2021.

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

- In September 2021, 16% of Australians said that transport in their local area would be better in one year's time, up from 15% in March 2021.

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

- In September 2021, 17% of Australians think that transport in Australia will be better in one year, identical to 17% in March 2021.

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

- In September 2021, 35% of Australians think that transport in Australia will be better in five years' time, up from 31% in March 2021.

## **ITLS Index of Transport Confidence**

- Compared to the launch of TOPS in March 2010, in September 2021, Australians are less confident about transport in their local area (Confidence index: down from 100 to 96) and have less confidence across Australia in one year's time (Confidence index: down from 100 to 94), but have an equal level of confidence in five years' time (Confidence index: equivalent at 100).

## **Over half of the potential new car buyers are considering electric cars**

- Among all respondents asked, 63.8% of Australians may consider purchasing a car in the next 12 months, of which 53% said they would consider buying an electric car. This purchase intention of electric cars is the highest in NSW at 55.9% and the lowest in WA at 46.5%.

## **Australians are planning domestic and international trips**

- Once the domestic and international borders are opened again and when hotel quarantine is no longer mandated, in the following 12 months, Australians will take international and domestic trips for different purposes. Nearly 50% of Australians are planning at least one domestic trip to visit family and friends, and almost 54% are planning at least one domestic trip to treat themselves. Nearly 28% of Australians are planning international trips to visit family and friends, and about 30% are planning to take international trips to treat themselves.

## About the Transport Opinion Survey

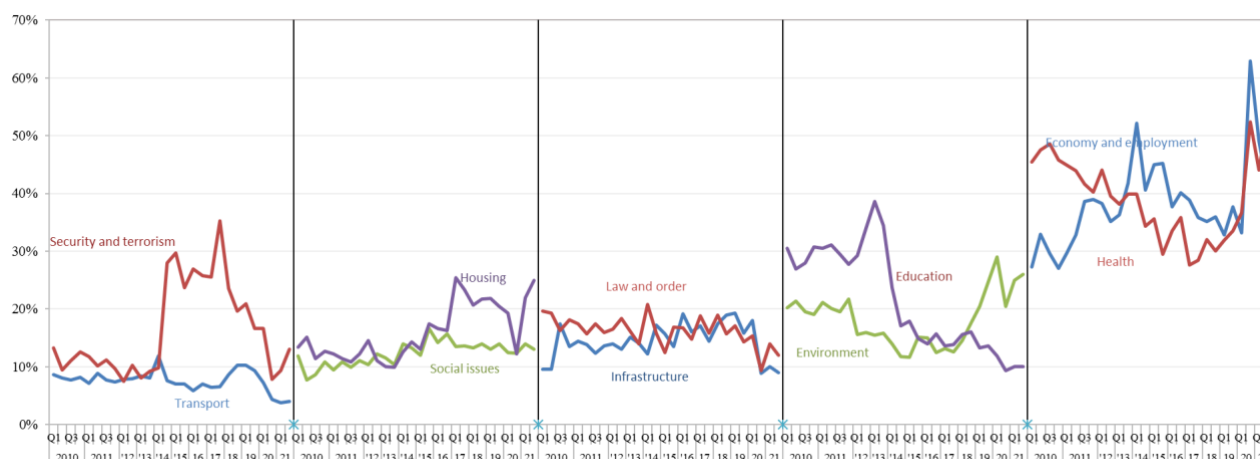
The Transport Opinion Survey is a biannual survey (quarterly from 2011 backwards) of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. The survey methodology was changed to an online survey from March 2014, using an online panel. The September 2021 survey was conducted between the 14<sup>th</sup> and 24<sup>th</sup> of September. This report is based on the data from 1,105 completed responses.

### Transport as a national priority

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

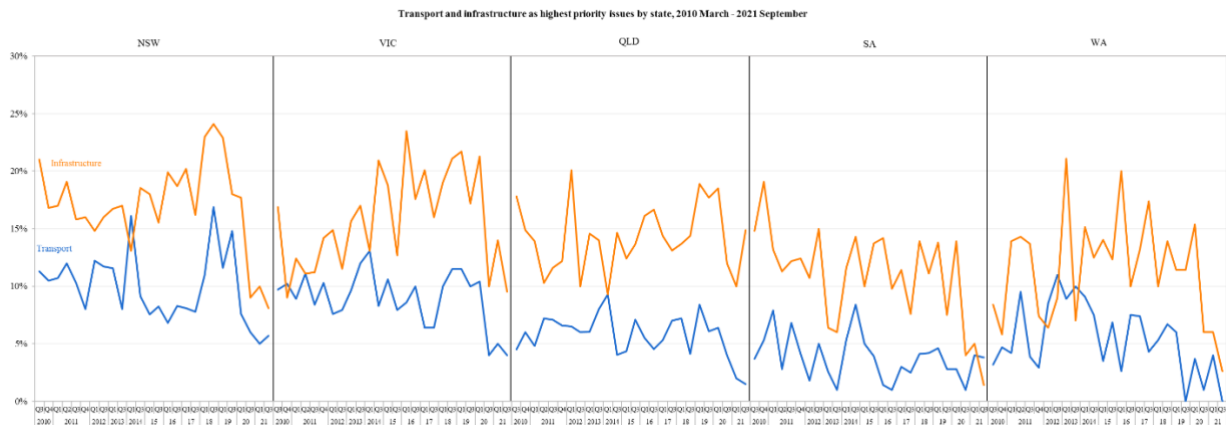
- In September 2021, the priority that increased most from the March 2021 survey is health, up from 44% to 53% nominated by Australians. This result is not surprising given that the study was conducted during strict lockdowns in NSW and VIC, with all other states on high alert. The economy and employment are the second-highest priority at 41% but is down from 49% in March 2021. Australians are slightly more concerned about the environment at 26%, up from 25% in March 2021. They are somewhat less concerned about housing at 20%, down from 22% in March 2021. Concerns on security and terrorism have increased from 9% in March 2021 to 13% in September 2021.
- These changes reflect the direct impact of lockdowns on people and their concerns about health and the economy. The issues that are not directly related to the pandemic or are not regarded as the priorities for the moment, having received less attention. The levels of attention on infrastructure and transport received a similar level of attention as in March 2021, but were not regarded as priorities.
- 9% of Australians nominated infrastructure, and 4% 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 - 2021 September



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

The priority of transport and infrastructure at the national level is regarded differently by residents in different states. In September 2021, 6% of New South Wales residents nominated transport as a priority compared to 2% of Queensland residents. 15% of Queenslanders and 10% of Victorians selected infrastructure as one of the priorities compared to 1% of South Australian residents and 3% of Western Australian residents. There are slight decrease in the percentage of residents of most states nominating infrastructure and transport as top priorities compared to March 2021.

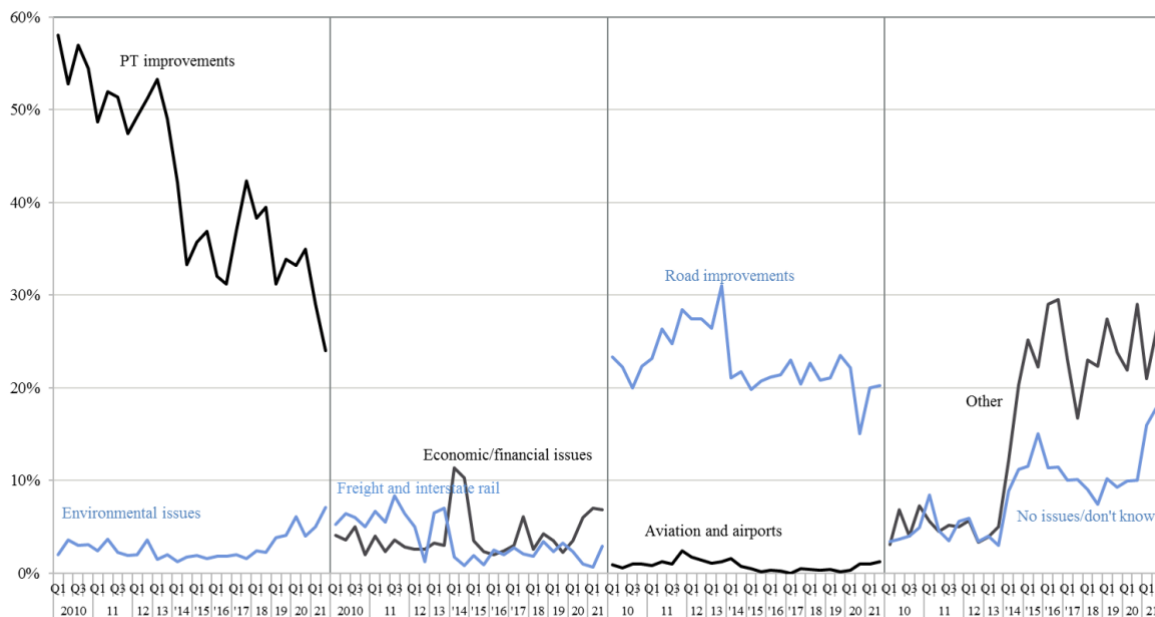


## Highest priority issue for transport

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

- In September 2021, 24% of Australians said that the highest priority issue for transport in Australia is public transport improvements (down from 29% in March 2021). Public transport has been the highest priority transport issue since the beginning of the survey in 2010, but in the September 2021 survey, the highest priority issues are other issues mainly related to the pandemic, lockdown and safety-related matters at 26%, up from 21% in March 2021. 20% of Australians nominated road improvements as the priority issue (identical to 20% in March 2021).

Highest priority transport issue in Australia, 2010 March - 2021 September

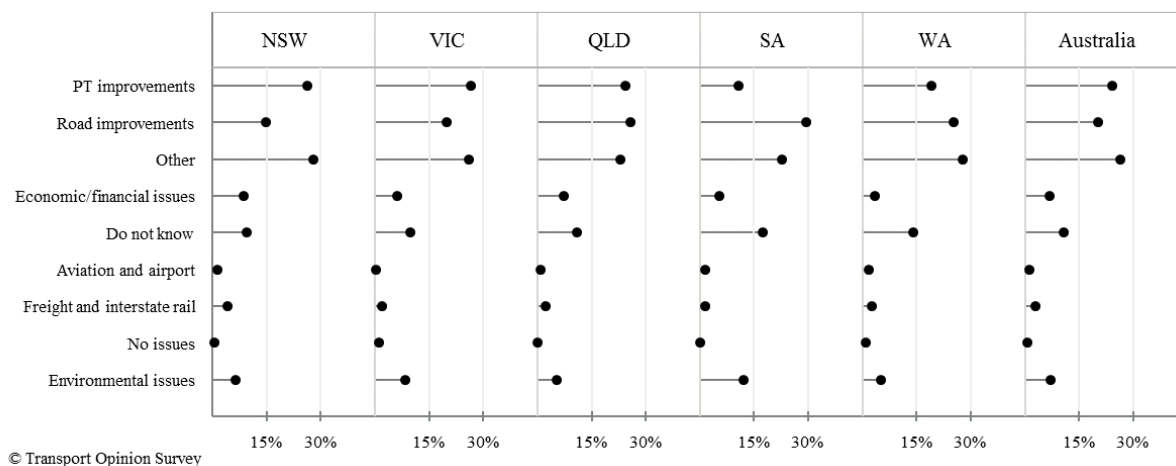


Note: percentages add up to 100% in each quarter. "Other" includes responses about transport in general, responses about both public transport and roads, issues not included in other categories such as lockdown, restrictions, safety, terrorism, and rebuilding transport after disasters.

- In the September 2021 survey, people in New South Wales and Victoria consider public transport improvements more important than road improvements (26.4% against 14.8% for NSW and 26.6% against 19.8% for VIC). In other states, including Queensland, South Australia and West Australia, road improvements are more important (e.g., 25.8% for QLD, 29.3% for SA and 25.2% for WA). Except in Victoria and Queensland, in all other states, other issues mainly related to the lockdown and health-related matters are regarded as having the highest priority. Overall, other issues are the highest priority with 26%, followed by 24% for public transport improvements and 20% for road improvements. 11% of

respondents were not sure about the highest priority, which was 4% more than in March 2021. Environmental issues also dropped as the highest priority, from 12% in March 2021 to 7%.

**Highest priority transport issue by state, 2021 September**

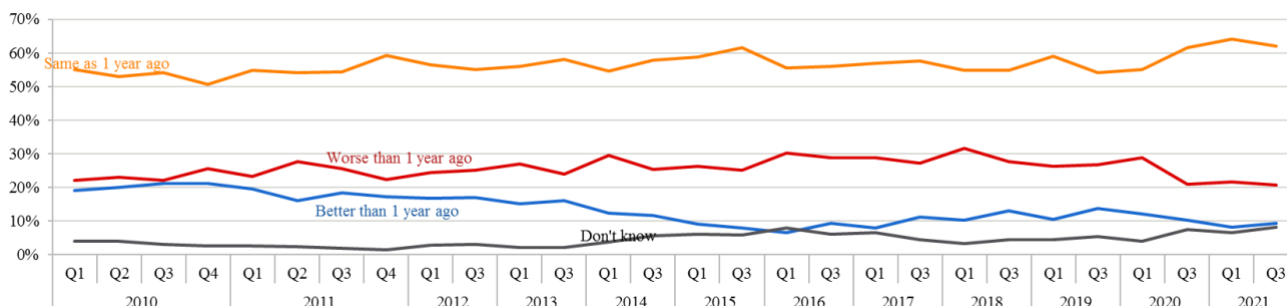


### Local transport is slightly better and people's confidence is somewhat increasing

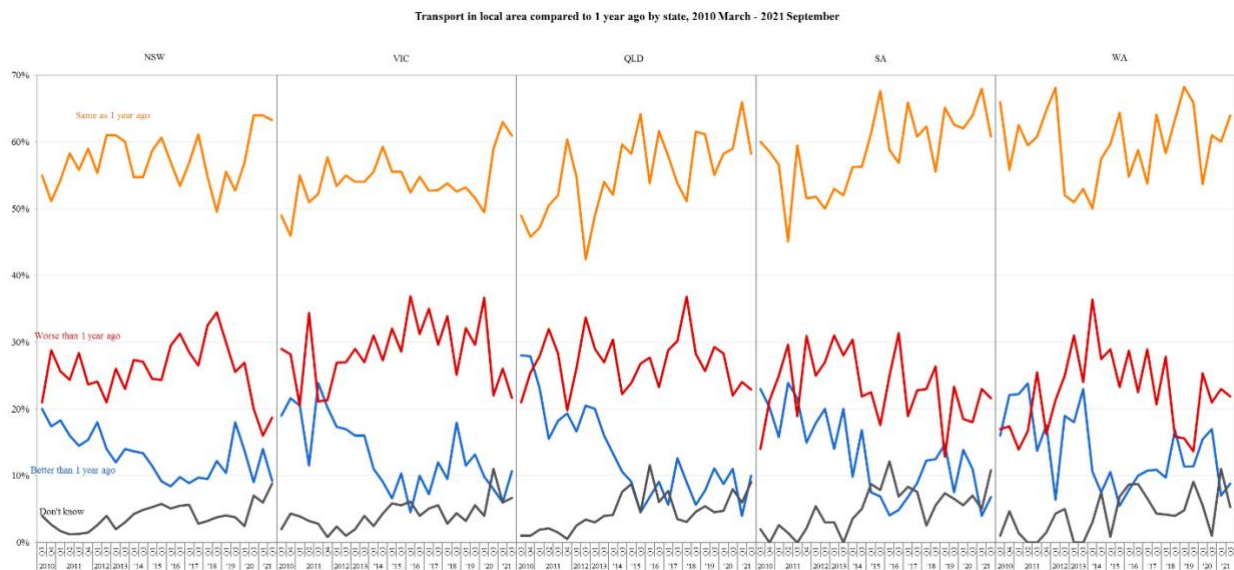
Compared to 1 year ago, do you think the state of transport in general in your local area is better now, the same, or worse now?

- In September 2021, 9% of Australians believed that transport in their local area is better now than one year ago (up from 8% in March 2021), while 62% of Australians said it is the same as one year ago (down from 64%), and 21% of Australian said it is worse now than one year ago (down 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 - 2021 September**

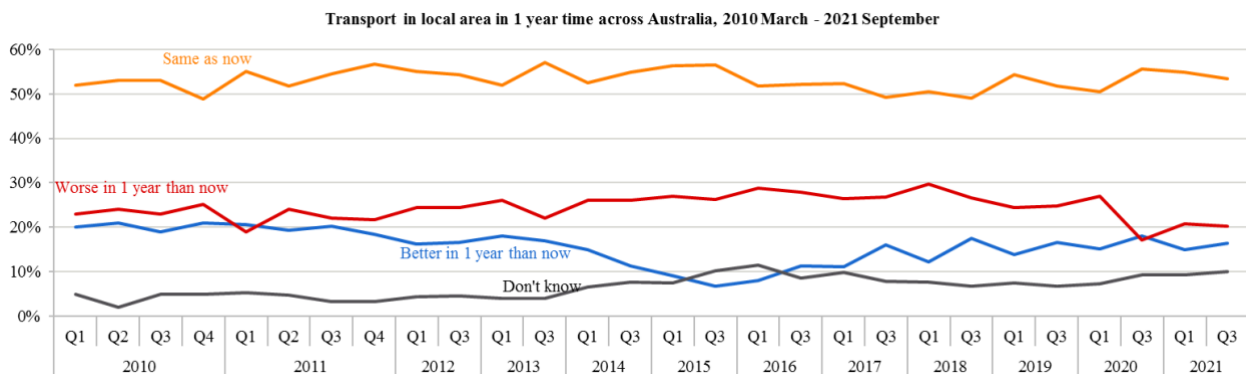


- The evaluation of transport in the local area by respondents is not consistent in all states of Australia. In NSW and VIC, 72% of respondents think transport is better or the same as one year ago. This is higher than the numbers for QLD and SA at 68%. People in WA were the most optimistic, with 73% believing that transport is not worse than one year ago. The proportion of residents thinking that transport is becoming better in their local area has decreased in NSW only at 9%, down from 14% in March 2021. In all other states, the percentages of people thinking that transport is better than one year ago have increased from March 2021, with 5% more for VIC, 6% more for QLD, 3% more for SA and 2% more for WA.



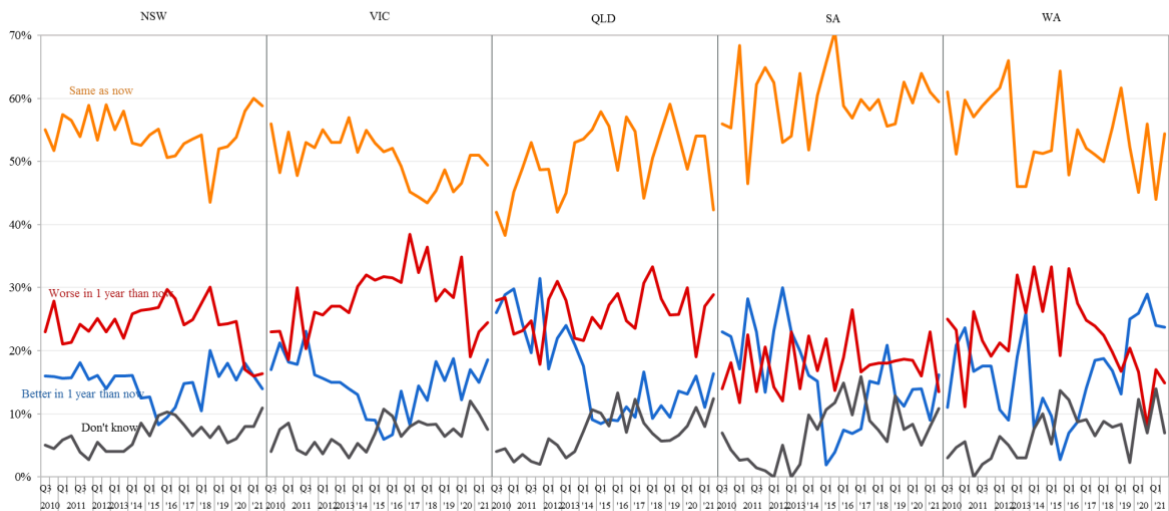
*Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?*

- In September 2021, 53% of Australians said that transport in their local area would be the same in one year's time. 16% said transport would be better, up from 15% in March 2021, while 20% said transport would be worse, down from 21% in March 2021.



- Australians have responded with more confidence to transport in their local area in one year's time in most states. With the most significant increase of confidence recorded in SA (16% chose "better in one year's time", up from 9% in March 2021), followed by QLD (16% chose "better in one year's time", up from 11%) and VIC (19% chose "better in one year's time", up from 15%). Australians living in NSW remain relatively unchanged in their views compared to March 2021.

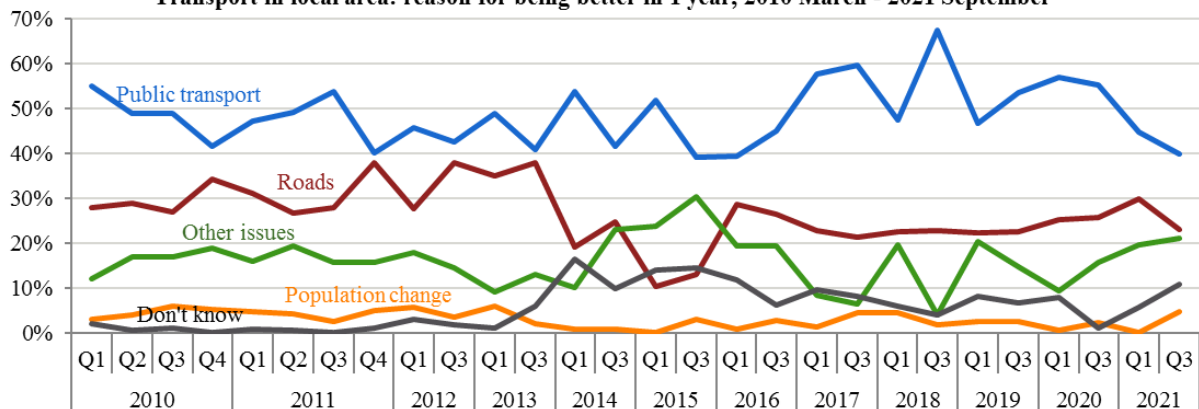
Transport in local area in 1 year time by state, 2010 March - 2021 September



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

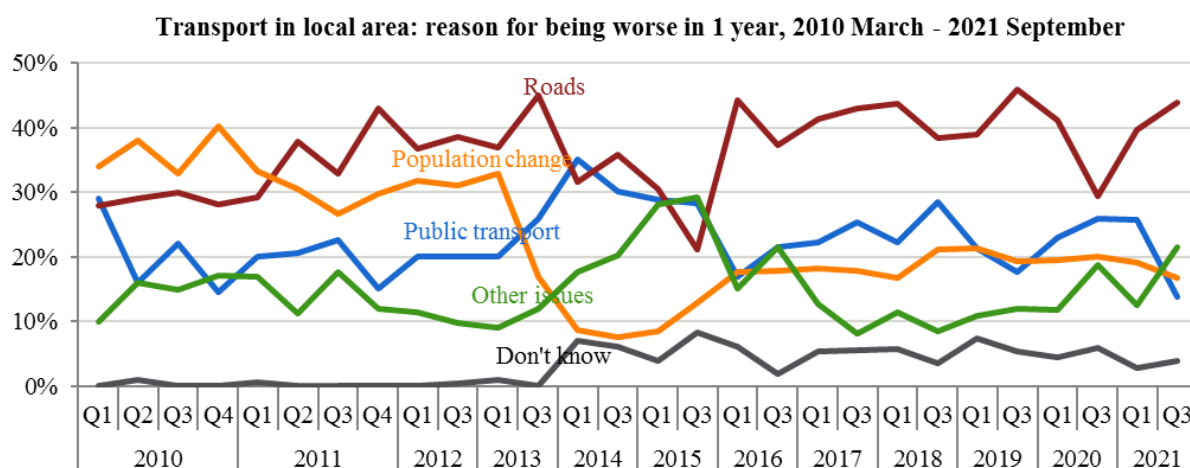
- Public transport services are the main reason for residents to believe that their local transport will be better in one year (top figure) at 40%, while roads are the main reasons for residents to believe that their local transport will be worse (bottom figure) in one year at 44%. Both public transport and road improvements are still the main reasons Australians believe the transport will become better in their local area while other issues related to the recent events due to the pandemic lockdown and health issues have significantly increased as a reason for people to think their local transport may get worse. Other issues increased substantially from 13% to 22% from March 2021 and became the second main reason for residents to believe that their local transport will worsen in one year. On the other hand, other issues including economic and financial matters and environmental issues, increased as the third reason for local transport improving.

Transport in local area: reason for being better in 1 year, 2010 March - 2021 September



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



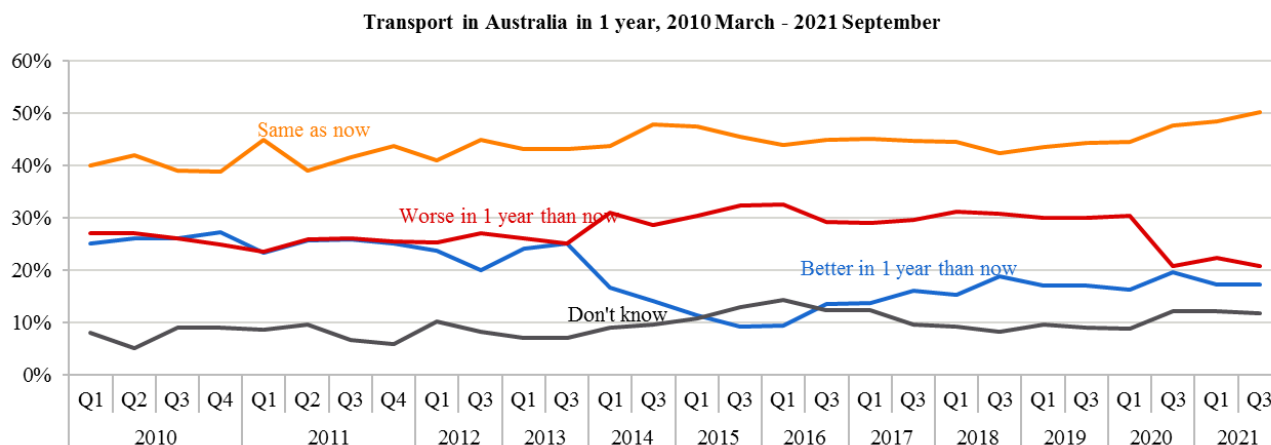


Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, lockdowns, health, border closure and issues not included in public transport, road and population change categories.

## Confidence about transport in Australia is slightly better in the short-term and is much better in the 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?

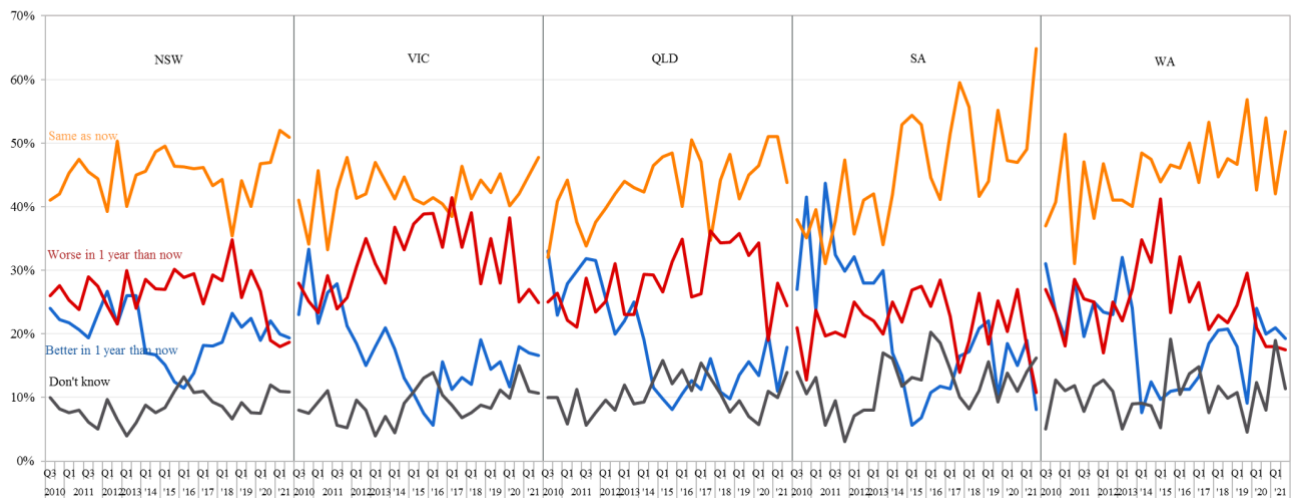
- In September 2021, 50% of Australians said that the state of transport in Australia in one year's time will be the same as now, with 17% of Australians saying that the state of transport in Australia will be better in one year's time, the same as in March 2021.



- In September 2021, about 24% of QLD residents said that the state of transport in Australia would worsen in one year, down from 28% in September 2021. In contrast, 18% of QLD residents said that the state of transport in Australia would be better in one year, up from 11% in March 2021. In NSW and VIC, the percentages of people identifying the the state of transport will be better, or the same remain close to that in March 2021. Among SA residents, those who believe the state of transport in Australia will become better or worse both decreased, but those who think it will remain the same have increased to 65%, up from 49% in March 2021. In WA, there have been no changes to the percentages of residents who believe the state of transport will become better or worse in one year, but those who think the the state of transport will be the same have increased to 52% from 42% in March 2021.



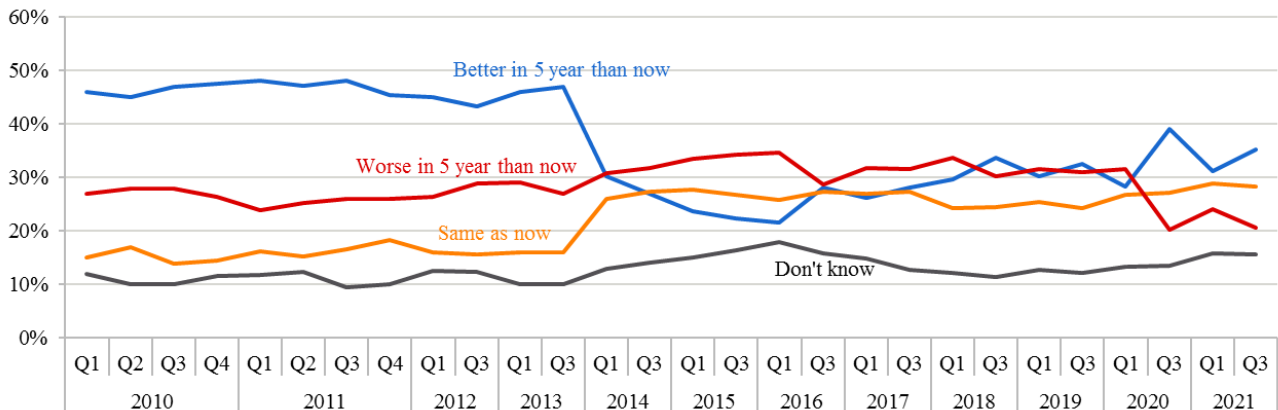
Transport in Australia in 1 year time by state, 2010 March - 2021 September



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

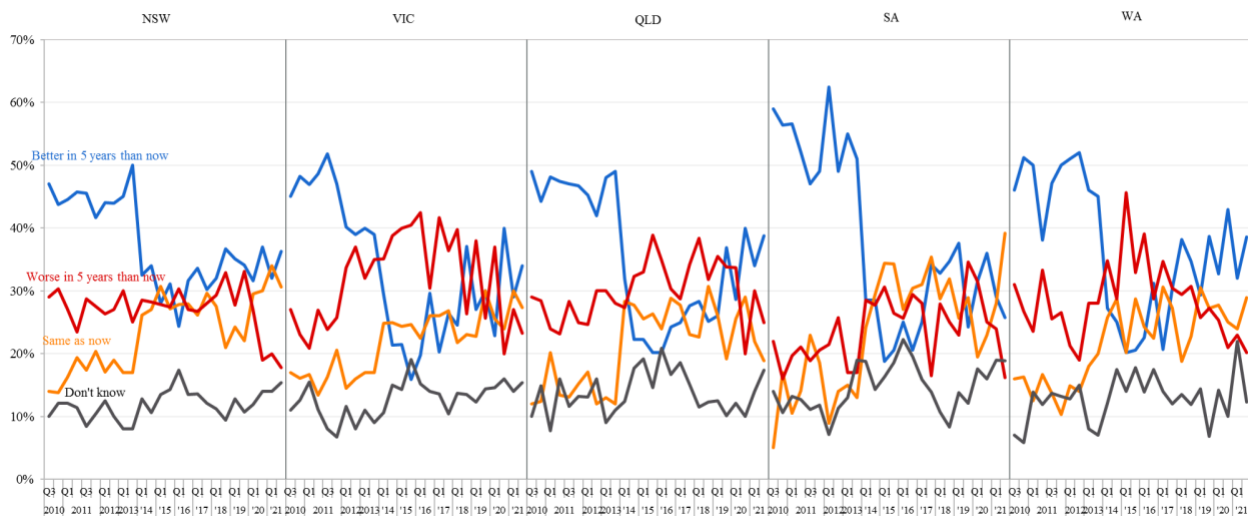
- Australians are significantly more confident that the state of transport will be better in five years' time than it is now. In September 2021, 35% of Australian residents believed the state of transport in Australia would be better in five years' time, up from 31% in March 2021. People think that the state of transport in Australia will worsen in five years' time, decreasing to 21% compared to 24% in March 2021.

Transport in Australia in 5 years, 2010 March - 2021 September



- In September 2021, the proportions of Australian residents in every state except SA believe Australia's transport will be better in five years have increased, 4% more in NSW, 5% more in VIC and QLD, and 7% more in WA compared to March 2021. Although SA residents have not increased in believing that the state of transport will be better, there is a significant increase in those who think the state of transport will remain the same. Australians across all states are gaining more long-term confidence about transport.

Transport in Australia in 5 years by state, 2010 March - 2021 September



### Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey about transport becoming better or worse are used to set an index of 100 in quarter 1, March 2010. In each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in five years' time are reported as changes in the TOPS Index.

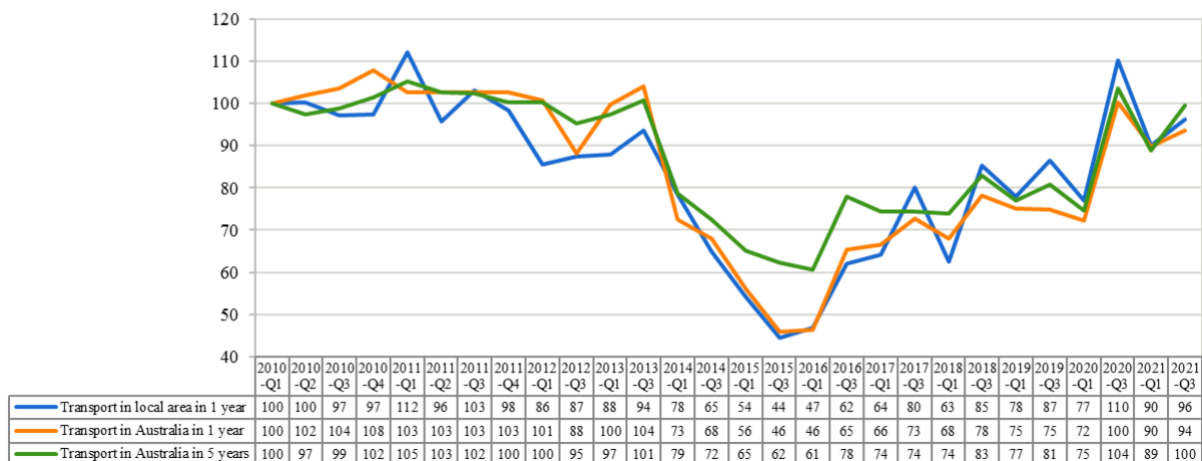
A TOPS Index value of more than 100 means that Australians' confidence about the state of transport getting better is more substantial relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2021 quarter as compared to September 2020 (one year earlier):

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

Compared to the launch of TOPS in March 2010, Australians are less confident about improvements in transport in their local area in September 2021 (Confidence index: from 100 to 96) and in Australia in the next year (Confidence index: from 100 to 94), but are equally confident about improvements in transport in Australia in five years' time (Confidence index: both at 100). There has been a solid increase in confidence since March 2021 and confidence is much improved compared to the start of the pandemic in March 2020, showing improvement confidence for future improvements once everything starts to get back to 'normal'.

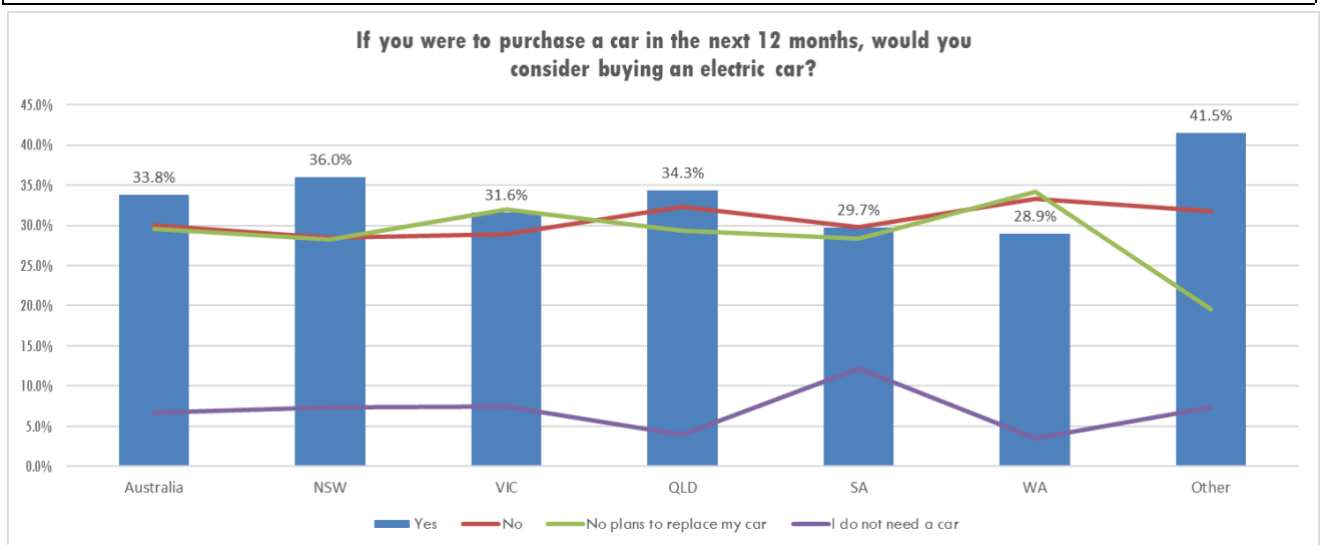
ITLS TOPS Index of Transport Confidence



## Supplementary questions in September 2021

### Moving Towards Electric Cars

- Potential new car buyers are interested in considering purchasing electric cars. Among the 63.8% of Australians who showed interest in considering purchasing new cars in the next 12 months, 53% of them would consider electric cars. This is encouraging given there are currently no formal incentives introduced in Australia for electric car buyers.



	Australia	NSW	VIC	QLD	SA	WA	Other
Yes	33.8%	36.0%	31.6%	34.3%	29.7%	28.9%	41.5%
No	30.0%	28.4%	28.9%	32.3%	29.7%	33.3%	31.7%
No plans to replace my car	29.6%	28.2%	32.0%	29.4%	28.4%	34.2%	19.5%
I do not need a car	6.7%	7.3%	7.5%	4.0%	12.2%	3.5%	7.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

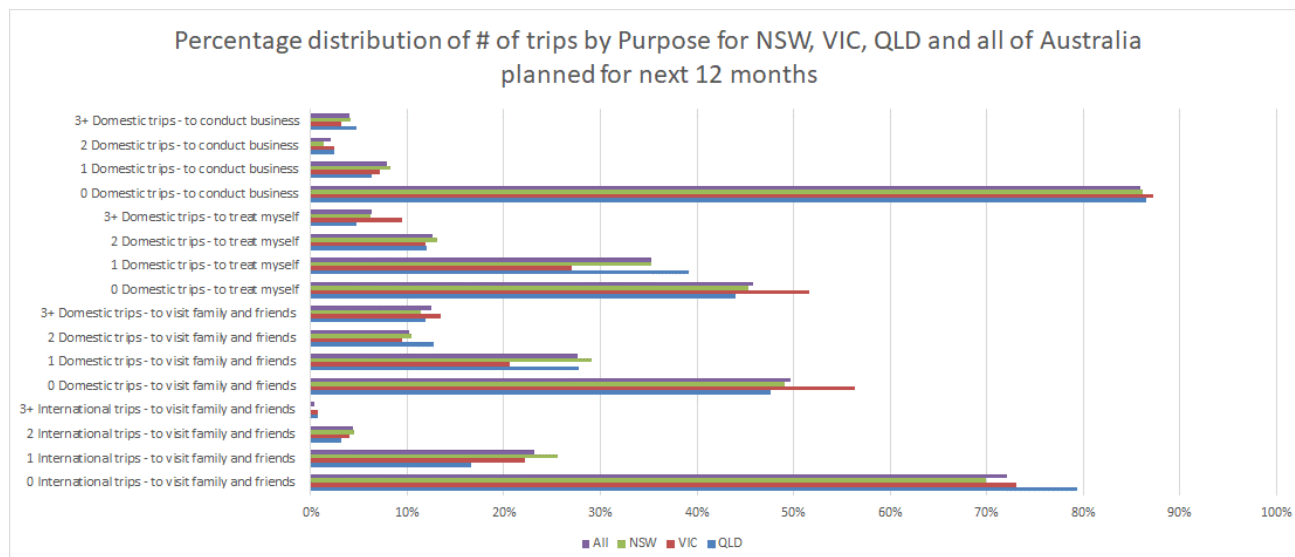
	Australia	NSW	VIC	QLD	SA	WA	Other
Potential new car buyers	53.0%	55.9%	52.3%	51.5%	50.0%	46.5%	56.7%

- Potential new car buyers in NSW are more interested in electric cars than potential buyers in other states, leading at 55.9%. Potential buyers in WA have the lowest level of interest in electric cars at 46.5%.

## Planning to Travel Internationally and Domestically

Once the domestic and international borders are opened again and when hotel quarantine is no longer mandated, in the following 12 months, Australians will take international and domestic trips for different purposes. Nearly 50% of Australians are planning at least one domestic trip to visit family and friends, and almost 54% are planning at least one domestic trip to treat themselves.

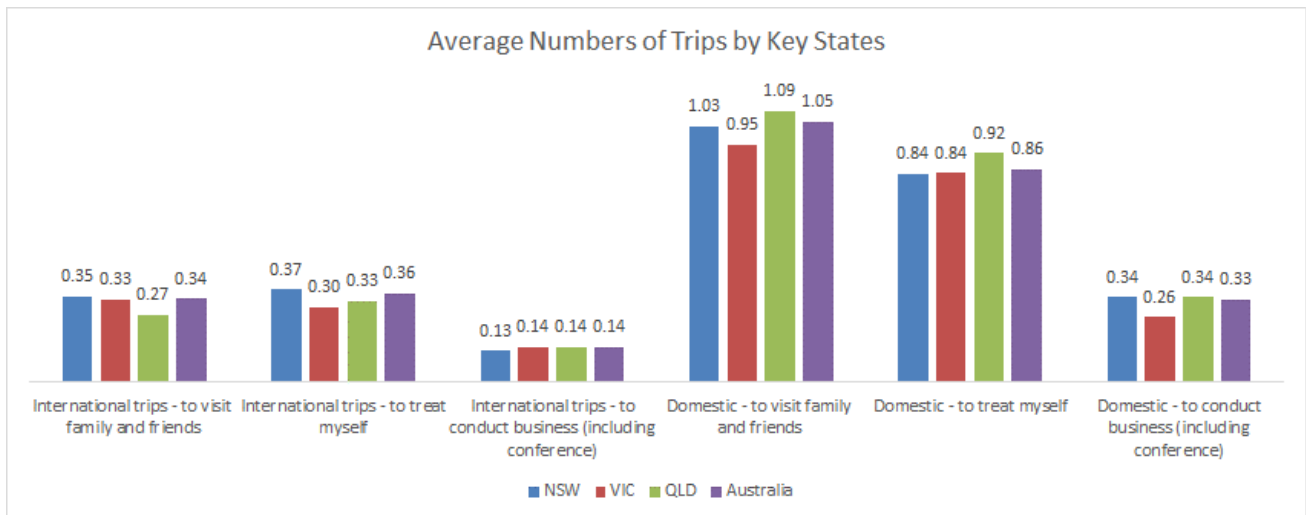
Nearly 28% of Australians are planning international trips to visit family and friends, and about 30% are planning to take international trips to treat themselves.



	QLD	VIC	NSW	All
0 International trips - to visit family and friends	79%	73%	70%	72%
1 International trips - to visit family and friends	17%	22%	26%	23%
2 International trips - to visit family and friends	3%	4%	4%	4%
3+ International trips - to visit family and friends	1%	1%	0%	0%
0 Domestic trips - to visit family and friends	48%	56%	49%	50%
1 Domestic trips - to visit family and friends	28%	21%	29%	28%
2 Domestic trips - to visit family and friends	13%	10%	10%	10%
3+ Domestic trips - to visit family and friends	12%	13%	11%	12%
0 Domestic trips - to treat myself	44%	52%	45%	46%
1 Domestic trips - to treat myself	39%	27%	35%	35%
2 Domestic trips - to treat myself	12%	12%	13%	13%
3+ Domestic trips - to treat myself	5%	10%	6%	6%
0 Domestic trips - to conduct business	87%	87%	86%	86%
1 Domestic trips - to conduct business	6%	7%	8%	8%
2 Domestic trips - to conduct business	2%	2%	1%	2%
3+ Domestic trips - to conduct business	5%	3%	4%	4%

Residents in NSW and QLD have the highest levels of interest to undertake domestic trips. NSW residents are also leading in planning to fly overseas to visit family and friends, with 30% of NSW residents planning to fly internationally to visit family and friends.

Victorian residents are less interested in conducting international and domestic trips for personal purposes such as visiting family and friends but they are identical in their intention to travel for business purposes.



On average, each Australian resident plans 1.03 domestic trips to visit family and friends and 0.84 trips to travel within Australia to treat themselves. On average, each Australian plans 0.72 trips to travel internationally to either visit family or friends or treat themselves. A single trip is the dominant percentage where a trip will occur, but there remain a high percentage of the population who have no plans for any international travel (72%), any domestic travel to visit family and friends (50%), any other domestic trips as a treat (45%), and any domestic business trips (86%).

It seems clear that there would be a surge in domestic and international travel once the borders are opened, and when hotel quarantine is not mandated.

## Timing of TOPS

The fieldwork was conducted on the following dates:

- March 2010: 13 – 28 February 2010
- June 2010: 15 – 30 May 2010
- September 2010: 23 August – 5 September 2010
- December 2010: 5 – 17 November 2010
- March 2011: 9 – 27 February 2011
- June 2011: 13 – 30 May 2011
- September 2011: 11 – 25 August 2011
- December 2011: 4 – 22 November 2011
- March 2012: 10 – 26 February 2012
- September 2012: 10 – 27 August 2012
- March 2013: 23 March – 13 April
- September 2013: 10 – 26 August
- March 2014: 13 – 18 February 2014
- September 2014: 16 – 19 September 2014
- March 2015: 4 – 9 March 2015
- September 2015: 9 – 14 September 2015
- March 2016: 2 – 14 March 2016
- September 2016: 1 – 7 September 2016
- March 2017: 2 – 13 March 2017
- September 2017: 7 – 8 September 2017
- March 2018: 26 February – 6 March 2018
- September 2018: 30 August – 1 September 2018
- March 2019: 21 February – 5 March 2019
- September 2019: 6-9 September 2019
- March 2020: 26 February – 4 March 2020
- September 2020: 31 August – 3 September 2020
- March 2021: 4 March – 14 March 2021
- September 2021: 14 September – 24 September 2021

## More information

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

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

The Institute of Transport and Logistics Studies in The University of Sydney Business School provides education and conducts research in transport, logistics and supply chain management.

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