

INDUSTRY REPORT

Urban Mobility Trends

August 2022 edition

In August 2020 we released our first edition of what would become a biannual series of *Urban Mobility Trends* reports.

We surveyed thousands of people across cities in Australia and North America to track how COVID-19 was impacting the way they lived, worked and moved around cities over the course of the pandemic—from lockdowns, to reopening and recovery. While the world is adapting to COVID-19, its impact on everyday life for most people in the cities in which we operate (Australia and North America) is diminishing as governments wind back restrictive preventative measures.

In this edition of our *Urban Mobility Trends* series we look at a broader range of factors influencing mobility including working arrangements and transport preferences. We intend to track these factors annually, allowing us to observe mobility trends over time and share our findings with government and industry to contribute to transport planning and policy development.

Research

Online survey conducted between 21 June and 15 July 2022

5,066 respondents aged 18+ with a driver's licence from across Australia (Melbourne, Sydney, Brisbane), United States of America (Greater Washington Area covering Virginia and Maryland) and Canada (Montreal)*

Survey commissioned by Transurban and conducted by Nature

* Approximately 1,000 respondents from each Australian city, the United States of America and Canada

† Weighted average across all cities surveyed



3.5

average days people travel to their workplace or place of study each week[†]

24%

of people have changed the way they commute to work, with most of them switching from public transport to private vehicles[†]



Most people expect their transport use to stay the same over the next 12 months, with slight increases expected on public transport

Executive summary

In the past two years people world-wide have experienced many changes in how they live, work and move around cities. While some of these changes were temporary, in response to the immediate health risk posed by the global pandemic and associated government-mandated safety restrictions, others have proven more enduring.

Our July 2022 research found around 1 in 4 respondents across the Australian cities surveyed and Montreal have changed the mode of transport they use to get to work and/or study (the number is slightly lower in the Greater Washington Area), with most switching from public transport to private vehicles (Figure 1).

These changes in people's travel habits appear unlikely to revert over the short term given that most people expect their use of all modes of transport to stay more or less the same over the next 12 months. The increasing preference for private vehicles over public transport has been playing out since the start of the pandemic, initially the result of public health measures. It now appears that some people may have changed their routines as a result of increasing flexibility.

For example, someone who took the train or bus to work five days a week pre-pandemic may now choose to drive three days a week at a time that suits them. And heading into the workplace at least three days a week does appear to be the preferred option.

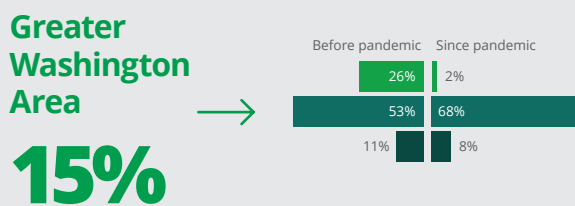
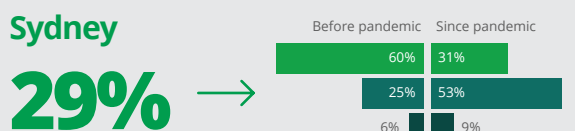


People's travel habits appear unlikely to revert over the short term given that most people expect their use of all modes of transport to stay more or less the same over the next 12 months.

Across the cities we surveyed, the average number of days people travel to their workplace ranges from between 3.4 to 3.7. And while CBD office occupancy is still well below pre-pandemic levels, inner-city workers travel to their workplace just as often as others. On average, people expect to work from home 1.8 days a week once the risk of the COVID-19 has passed, which is consistent with our January 2022 findings.

FIGURE 1: CHANGE IN MODE OF TRANSPORT USED TO COMMUTE TO WORK/STUDY BEFORE AND SINCE THE COVID-19 PANDEMIC*

- Public transport
- Private vehicles
- Active transport



* Totals don't add up to 100% as data shown excludes people who switched from/to ridesharing, carpooling and 'other' options.

Another factor in how people decide to travel to their workplace is the flexibility of when they can start and finish, which could give them the ability to avoid peak times. We found that 71% of respondents in Melbourne, Sydney and Brisbane now have access to varied start and finish times, which is substantially higher than the 37% of respondents who said they had access pre-pandemic, when we first asked in January 2021. Despite greater flexibility in start and finish times we are seeing traditional peak hours return across the broader road networks in these cities.

Another consequence of the pandemic is supply chain disruption, which combined with increases in the cost of oil as a result of the Russia-Ukraine war, has resulted in rising inflation globally. This is increasing the cost of everyday household expenses, and noticeably, the cost of petrol. Over 60% of respondents nominate the cost of petrol (or gasoline as it is referred to in North America) as a top concern. However, the cost of petrol doesn't appear to be having a significant impact on everyday transport choices, with most respondents saying they don't consider the cost of fuel, or only do so occasionally when commuting or making short trips. The cost of fuel is a considerable factor for people when planning long trips.

In Australia, the increasing cost of petrol has been partially offset by the Federal Government temporarily halving fuel excise from 44.2 to 22.1 cents per litre. It appears

widespread media coverage of the cut has not translated to increased awareness of the cost of fuel excise, with only 20% of respondents in the Australian cities surveyed able to accurately identify how much they pay per litre in fuel excise, up 6 percentage points since we first asked the question this time last year. With the temporary measure due to end on 28 September 2022, we think it may be an opportune time for government to canvass a more sustainable road funding system.

While the past two years have seen rapid changes when it comes to people's work habits and transport preference, it seems we are entering a period of relative stability. We now have a clearer picture of how people are working and getting around their cities, allowing us to evaluate the impact to transport networks and consider factors in how cities should respond.

The fact that people expect to travel to their workplace for the majority of their work week, coupled with a significant proportion of commuters switching from public transport to private vehicles has the potential to increase pressure on our cities' road networks as population growth eventually resumes.

This extra demand could be offset by greater flexibility helping to spread traffic movement beyond the traditional AM and PM peak. Finding ways to maintain, and improve upon, the adoption of flexibility, such as varied start and finish times will be vital to manage future demand across the road network.

Public transport patronage

In the cities surveyed, public transport patronage is still well below pre-pandemic levels, whereas indicators of private vehicle travel (such as TomTom congestion data and Transurban's own Average Daily Traffic figures) show a return towards pre-pandemic levels.

We found that the most common reason for using public transport is to commute, (see Figure 3 on page 6 and 7) hence the disproportionate impact on patronage numbers when compared to other modes of transport.

- Public transport patronage was down 33% on pre-pandemic levels in Greater Sydney during June 2022¹
- Public transport patronage was down 41.7% on pre-pandemic levels in South East Queensland during May 2022²
- Public transport patronage was down 35% on pre-pandemic levels in Melbourne on July 21 2022³

- Public transport patronage (rail) was down 55.8% on pre-pandemic levels in the Greater Washington Area during the first three weeks of July 2022⁴
- Public transport patronage (bus) was down 21.7% on pre-pandemic levels in the Greater Washington Area during the first three weeks of July 2022⁵
- Visits to public transport hubs were down 32.2% on pre-pandemic levels in Montreal during the first three weeks of July 2022.⁶

1 *Transport for NSW, Open Data, opendata.transport.nsw.gov.au/dataset/opal-trips-all-modes*

2 *Queensland Government Open Data Portal, Transport and Main Roads, data.qld.gov.au/dataset/go-card-transaction-data*

3 *Rachel Eddie and Sumeyya Ilanbey (2022, July 25) Office workers keep commuting to Melbourne CBD despite Omicron wave, The Age*

4 *Washington Metro Area Transit Authority, Ridership Monitoring, wmata.com/service/covid19/covid-19-public-information.cfm*

5 *Ibid.*

6 *Google, COVID-19 Community Mobility Reports, google.com/covid19/mobility/*

Section 1: Travel behaviour



Most people **expect their transport use to stay the same over the next 12 months**, with slight increases expected in public transport



The most common reason **people use toll roads or Express Lanes is to go on a getaway**, or when they need to get to and from the airport



The most common reason **people use public transport is to commute**

This section looks at which modes of transport people choose to use to move around cities and the reasons for their travel.

How people get around

At the time the survey was in market, patronage on public transport in all markets was below pre-pandemic levels. Meanwhile traffic levels across Transurban's roads in the fourth quarter of the 2022 financial year (April-June 2022) exceeded traffic levels in the same period of the 2019 financial year.

While there are small variations, it seems most people expect their transport use (across all modes) to stay the same over the next 12 months (Figure 2).

In our previous *Urban Mobility Trends* reports we found an increasing preference for private vehicles over public transport. These latest findings suggest the shift from public transport to private vehicles is unlikely to change in the short term. Earlier versions of our *Urban Mobility Trends* reports can be found on the [Transurban Insights hub](#).

Key findings

77%+ of respondents expect to use private vehicles at least several times a week in the next 12 months.

Public transport use was mixed across markets, in Sydney 65% of respondents expect to use public transport at least several times a week in the next 12 months, Melbourne (50%), Montreal (33%), Brisbane (27%), and the Greater Washington Area (15%).

FIGURE 2: TRANSPORT MODE CHOICE NOW VS EXPECTED USE IN 12 MONTHS

■ Now ■ Next 12 months

MELBOURNE

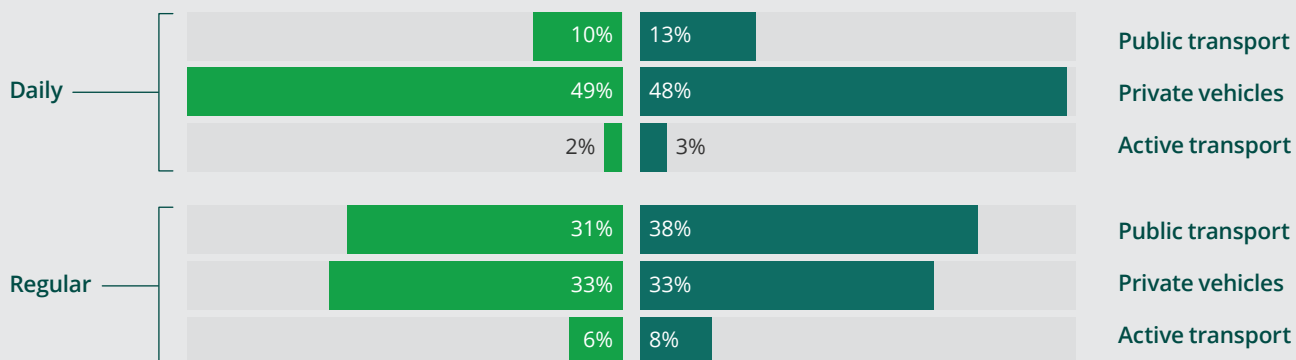
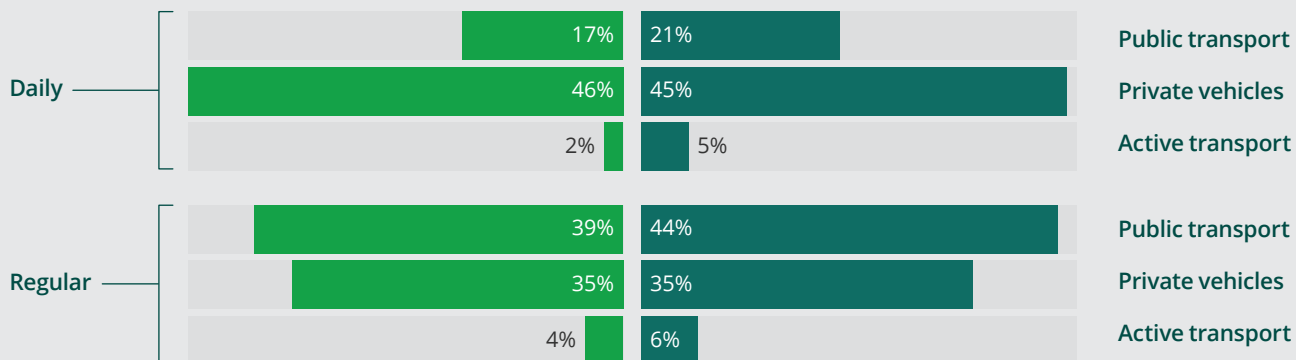


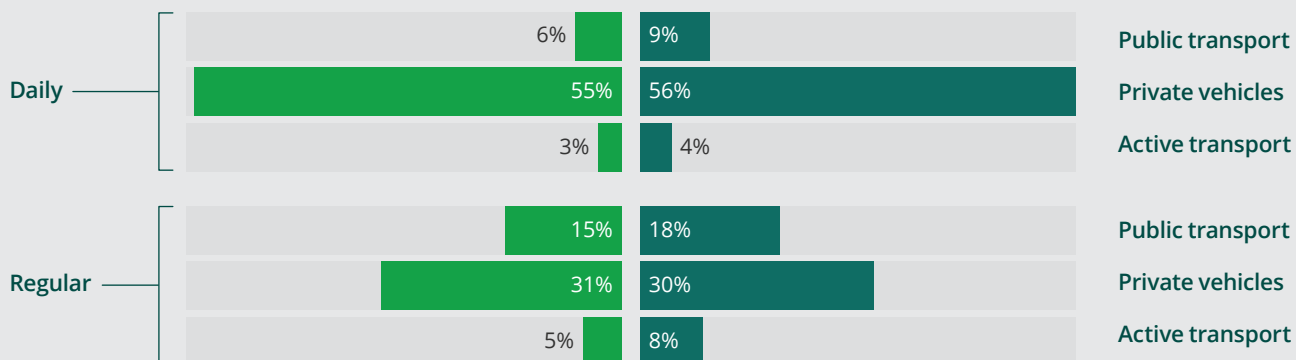
FIGURE 2 TRANSPORT MODE CHOICE NOW VS EXPECTED USE IN 12 MONTHS (CONTINUED)

Now Next 12 months

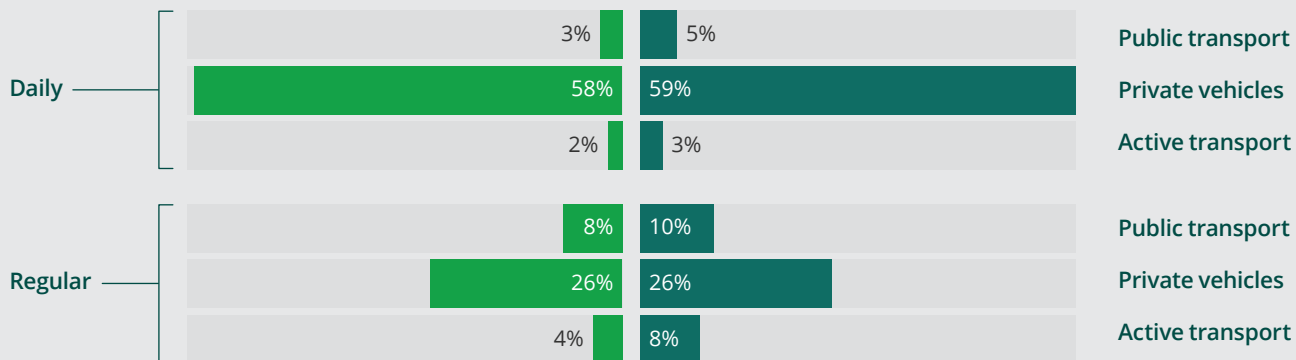
SYDNEY



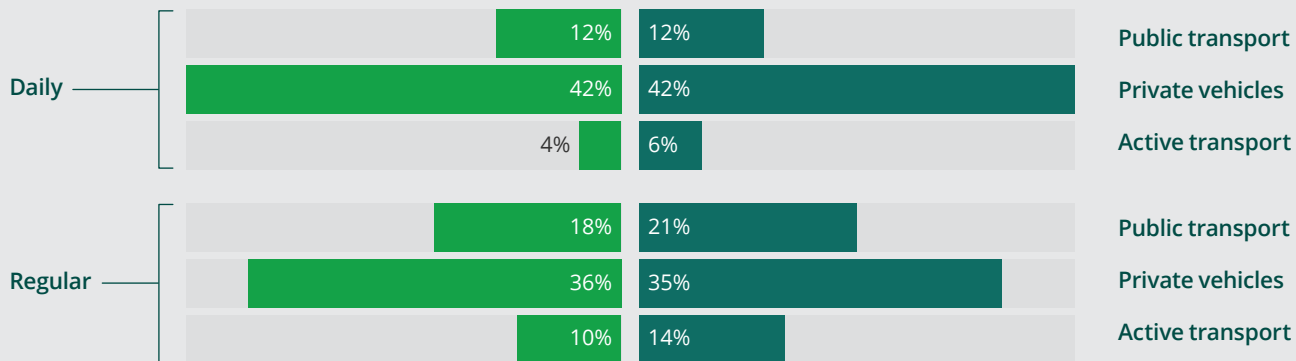
BRISBANE



GREATER WASHINGTON AREA



MONTREAL



Where people are going

Key findings

The most common reason for using public transport is to commute.

People are more likely to choose ride share services or carpool when heading to social events.

Local and arterial roads are relied on by people to run errands.

The most common reason for using toll roads or Express Lanes is to go on a getaway, or when people need to get to and from the airport.

FIGURE 3: REASONS FOR USING EACH TYPE OF TRANSPORT

MELBOURNE

MODE	SOCIAL	RECREATIONAL	COMMUTING	CARING	DURING THE DAY	AIRPORT	HOLIDAY, GETAWAY	ERRANDS	OTHER	DON'T USE
Public transport	40%	28%	49%	9%	25%	11%	14%	25%	5%	1%
Local, arterial roads	45%	36%	44%	17%	25%	19%	27%	68%	4%	3%
Un-tolled motorways	45%	32%	33%	17%	23%	28%	42%	47%	4%	7%
Tolled motorways	23%	14%	17%	8%	13%	29%	35%	15%	3%	25%
Ride share	59%	23%	22%	9%	18%	31%	16%	13%	2%	2%
Active transport	11%	15%	13%	6%	9%	4%	8%	21%	6%	51%
Carpool	47%	21%	27%	11%	20%	18%	25%	20%	2%	2%

SYDNEY

MODE	SOCIAL	RECREATIONAL	COMMUTING	CARING	DURING THE DAY	AIRPORT	HOLIDAY, GETAWAY	ERRANDS	OTHER	DON'T USE
Public transport	39%	30%	54%	12%	26%	20%	17%	27%	3%	1%
Local, arterial roads	43%	35%	42%	18%	25%	14%	26%	63%	3%	4%
Un-tolled motorways	41%	32%	27%	14%	17%	20%	43%	44%	2%	9%
Tolled roads	24%	15%	17%	10%	11%	25%	40%	17%	3%	23%
Ride share	58%	24%	28%	13%	15%	37%	21%	16%	1%	2%
Active transport	9%	12%	12%	5%	9%	3%	7%	17%	4%	58%
Carpool	45%	30%	28%	13%	18%	27%	32%	24%	0%	3%

FIGURE 3: REASONS FOR USING EACH TYPE OF TRANSPORT (CONTINUED)

BRISBANE

MODE	SOCIAL	RECREATIONAL	COMMUTING	CARING	DURING THE DAY	AIRPORT	HOLIDAY, GETAWAY	ERRANDS	OTHER	DON'T USE
Public transport	28%	25%	50%	9%	22%	14%	12%	24%	6%	0%
Local, arterial roads	44%	40%	44%	19%	29%	22%	33%	65%	3%	5%
Un-tolled motorways	42%	35%	36%	18%	22%	30%	49%	50%	3%	6%
Tolled motorways	23%	16%	16%	8%	12%	36%	41%	17%	5%	16%
Ride share	65%	24%	17%	10%	14%	31%	15%	14%	4%	1%
Active transport	10%	12%	13%	4%	8%	4%	7%	17%	7%	56%
Carpool	47%	40%	30%	16%	16%	14%	26%	26%	0%	2%

GREATER WASHINGTON AREA

MODE	SOCIAL	RECREATIONAL	COMMUTING	CARING	DURING THE DAY	AIRPORT	HOLIDAY, GETAWAY	ERRANDS	OTHER	DON'T USE
Public transport	27%	22%	46%	22%	27%	19%	18%	43%	6%	1%
Local, arterial roads	38%	35%	35%	20%	22%	13%	24%	77%	2%	6%
Un-tolled motorways	37%	30%	30%	16%	20%	26%	48%	58%	3%	9%
Express lanes	11%	9%	16%	7%	11%	17%	26%	14%	2%	42%
Ride share	42%	24%	26%	23%	17%	36%	24%	28%	6%	3%
Active transport	7%	10%	10%	5%	6%	5%	7%	19%	6%	63%
Carpool	34%	19%	33%	14%	21%	26%	27%	25%	2%	7%

MONTREAL

MODE	SOCIAL	RECREATIONAL	COMMUTING	CARING	DURING THE DAY	AIRPORT	HOLIDAY, GETAWAY	ERRANDS	OTHER	DON'T USE
Public transport	33%	33%	50%	19%	31%	11%	13%	31%	3%	1%
Local, arterial roads	38%	31%	34%	26%	18%	16%	29%	71%	2%	5%
Un-tolled motorways	37%	22%	23%	23%	17%	23%	43%	47%	3%	13%
Tolled motorways	17%	8%	11%	12%	7%	10%	28%	16%	2%	44%
Ride share	41%	24%	19%	22%	16%	31%	19%	20%	2%	4%
Active transport	10%	12%	13%	9%	8%	5%	7%	20%	6%	53%
Carpool	33%	34%	41%	20%	18%	18%	24%	23%	1%	2%

Section 2: Getting to work



3.5 average days people travel to their workplace or place of study each week*



24% of people have changed the way they commute to work, with most switching from public transport to private vehicles*



1.8 average days people expect to work from home once the risk of COVID-19 has passed*

* Weighted average across all cities surveyed

This section looks at how often people travel to their workplace, the means by which they get there, and whether their commuting patterns have changed since the start of the pandemic.

Where people are working from

Despite ongoing concerns around COVID-19 we found that most people travel to their workplace at least three days a week (Figure 4). While not everyone can choose to work from home, or work flexible start and finish times, it appears that even those who work in the inner-city (high-density location for office workers) travel to their workplace at least three times a week (Figure 5).

Respondents from Brisbane work from their workplace more than any other surveyed city, followed by Montreal and the Greater Washington Area. However, respondents from Montreal expect to work from home more than any other city. This could indicate that people in Montreal are mixing where they work during the day more than people from other cities. This is supported by people in Montreal being offered varied start and finish times at a higher rate than respondents from other cities (see Figure 11, page 15).

⁷ Inner city defined in the survey as 'in and around the city centre'

Key findings

Most people travel to their workplace or place of study for most of their working week.

The average number of days people travel to their workplace or place of study is similar for respondents who work/study in the inner city and those who work/study in the wider metropolitan area.⁷

The average number of days people expect to work from home once the risk of COVID-19 has passed are consistent with findings in our January 2022 survey.

FIGURE 4: AVERAGE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE OR PLACE OF STUDY (OR TRAVEL AROUND FOR THEIR JOB/STUDY)

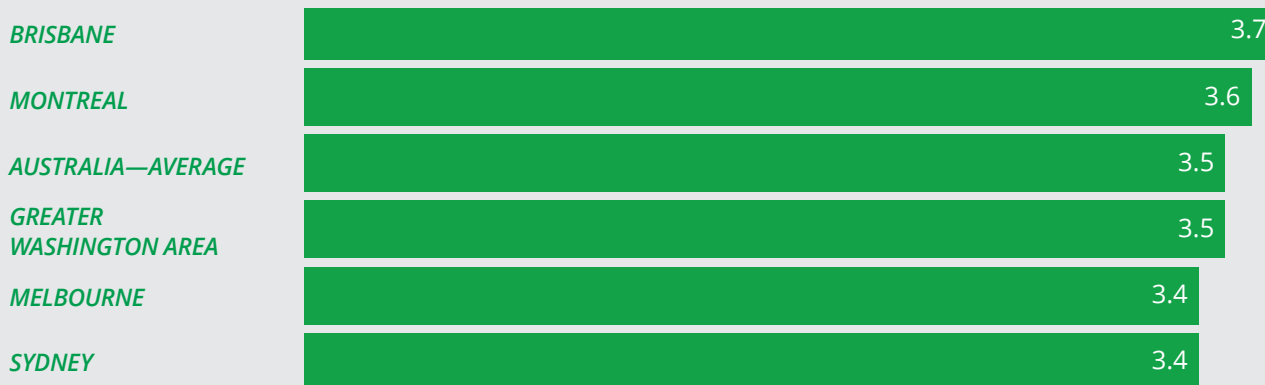


FIGURE 5: AVERAGE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE OR PLACE OF STUDY (OR TRAVEL AROUND FOR THEIR JOB/STUDY) IN THE INNER CITY, COMPARED TO ALL METROPOLITAN LOCATIONS

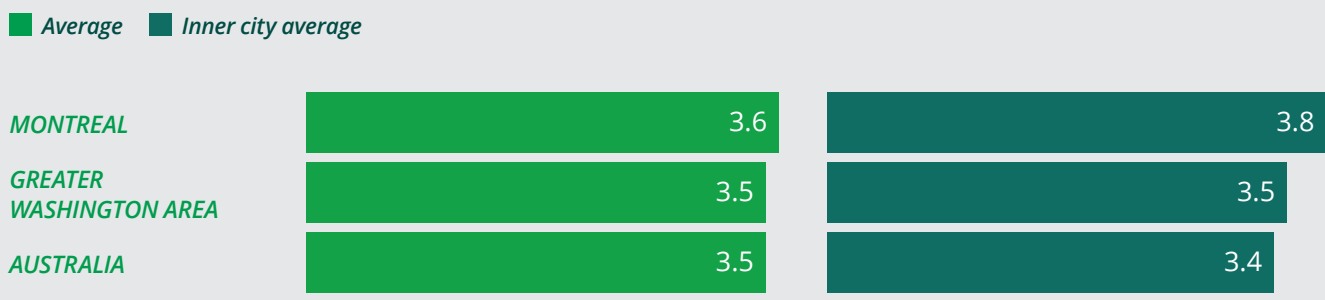
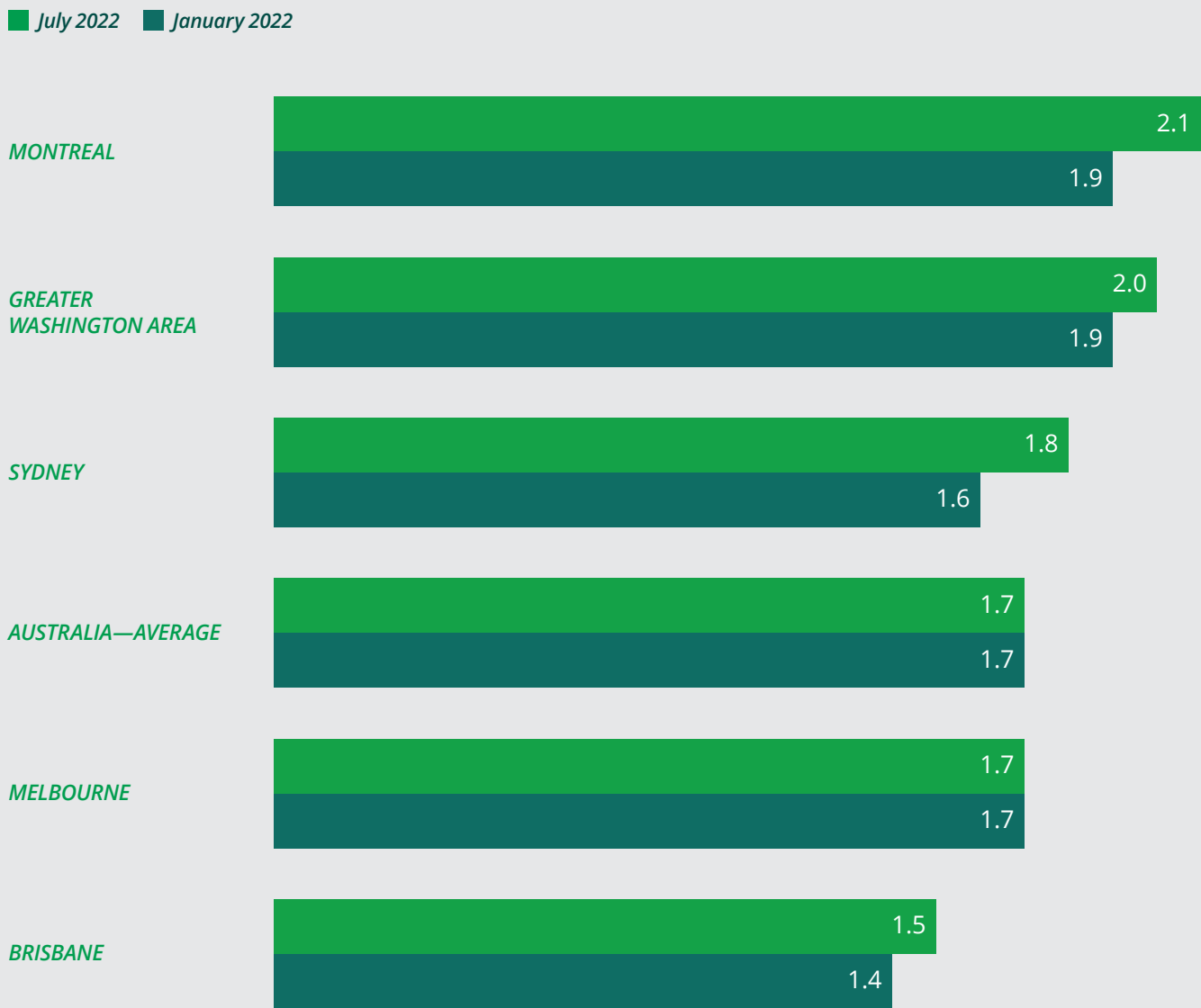


FIGURE 6: AVERAGE NUMBER OF DAYS PEOPLE EXPECT TO WORK FROM HOME ONCE THE RISK OF COVID-19 HAS PASSED, COMPARED TO WHEN WE ASKED THE SAME QUESTION IN JANUARY 2022



How people get to work or study

For many people, the pandemic changed where and when they work. The availability of flexible work practices such as varied start and finish times increased (see 'Flexible commute', page 14).

The pandemic also appears to have changed how people get to work. In every city surveyed there was a swing from public transport to private vehicles (Figure 8). This change has occurred in spite of congestion levels returning (and at times exceeding) pre-pandemic levels (Figure 10).

While it is unclear what is driving the change, it may be the result of people forming new habits based on increasing flexibility. For example, someone who took the train or bus to work five days a week pre-pandemic may now choose to drive three days a week at a time that suits them.

Key findings

Around 1 in 4 respondents from the Australian cities surveyed and Montreal say they have changed the way they get to work and/or study since the pandemic started.

Most people who changed their commute switched to private vehicles.

Most people use private vehicles to commute to work.



FIGURE 7: CHANGE IN MODE OF TRANSPORT USED TO COMMUTE SINCE THE START OF THE PANDEMIC

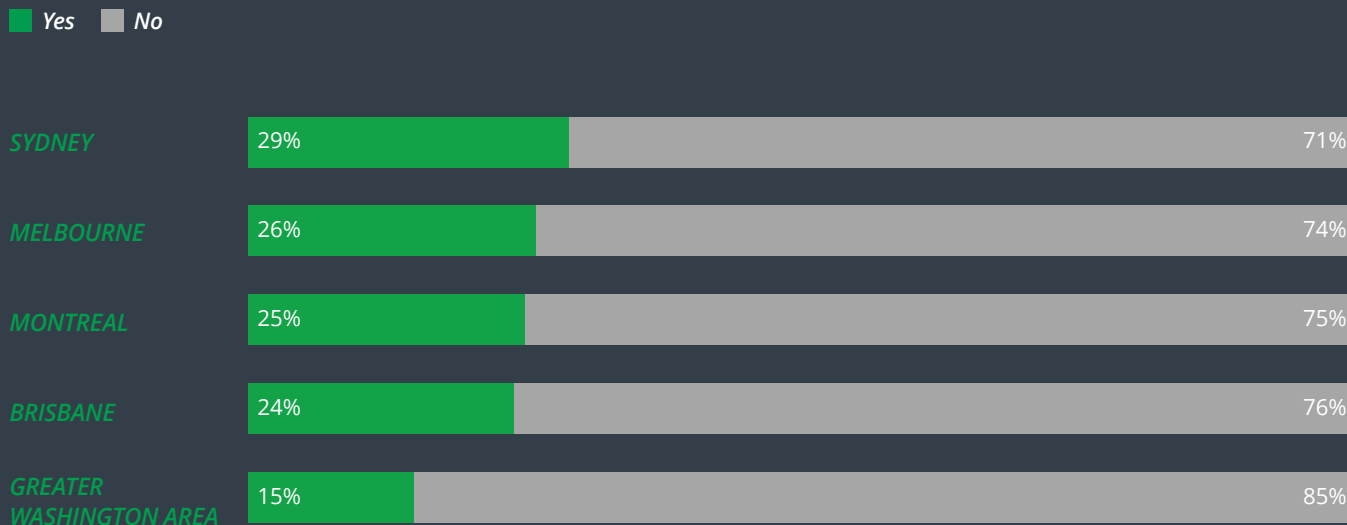


FIGURE 8: MAIN MODE OF TRANSPORT USED TO COMMUTE TO (OR TRAVEL AROUND FOR) WORK/STUDY BEFORE AND SINCE THE COVID-19 PANDEMIC*



* Data displayed shows how people who answered 'Yes' in Figure 7 changed their main mode of transport since the pandemic. Totals don't add up to 100% as data shown excludes people who switched from/to ridesharing, carpooling and 'other' options.

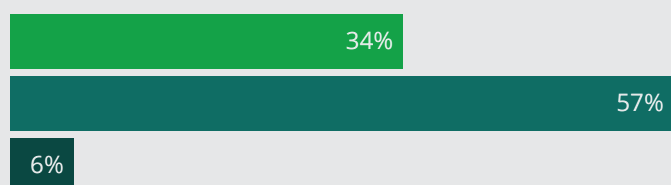
FIGURE 9: MAIN MODE OF TRANSPORT USED TO COMMUTE TO (OR TRAVEL AROUND FOR) WORK/STUDY

■ Public transport ■ Private vehicles ■ Active transport

MELBOURNE



SYDNEY



BRISBANE



GREATER WASHINGTON AREA

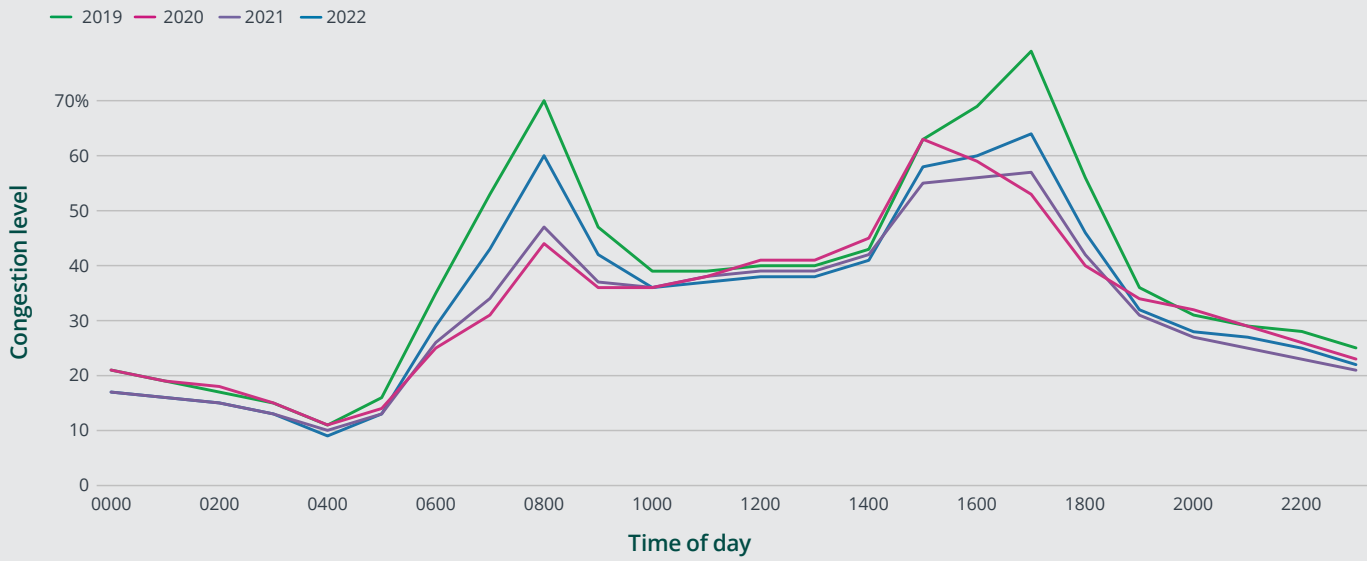


MONTREAL

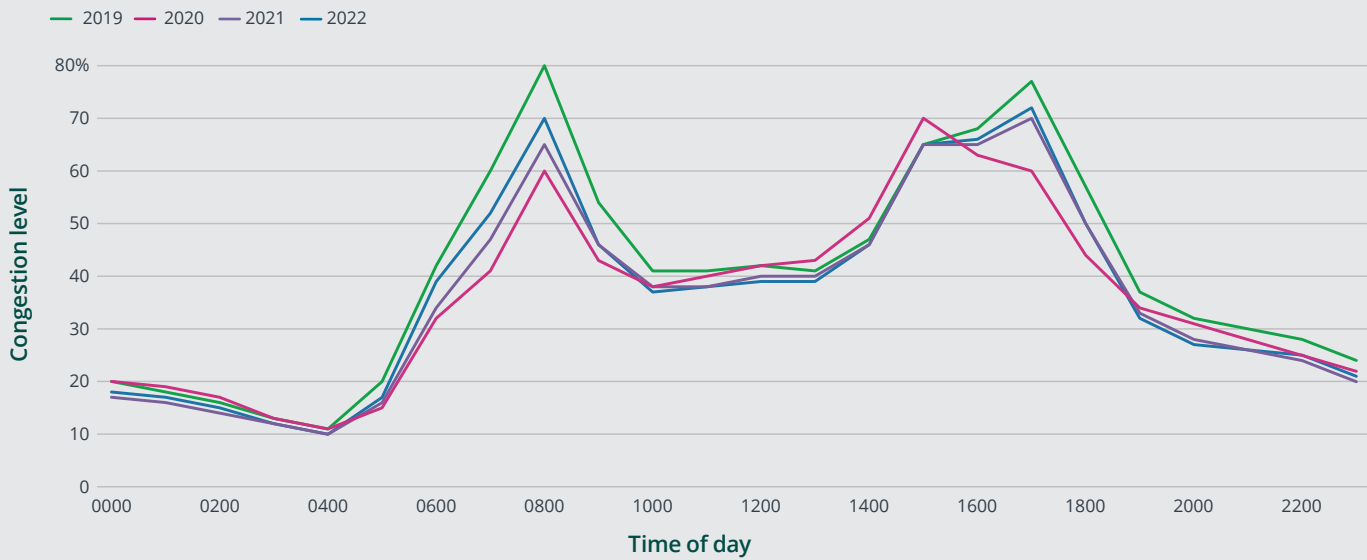


FIGURE 10: CONGESTION LEVELS FROM JUNE 2019 (PRE-PANDEMIC) TO JUNE 2022*

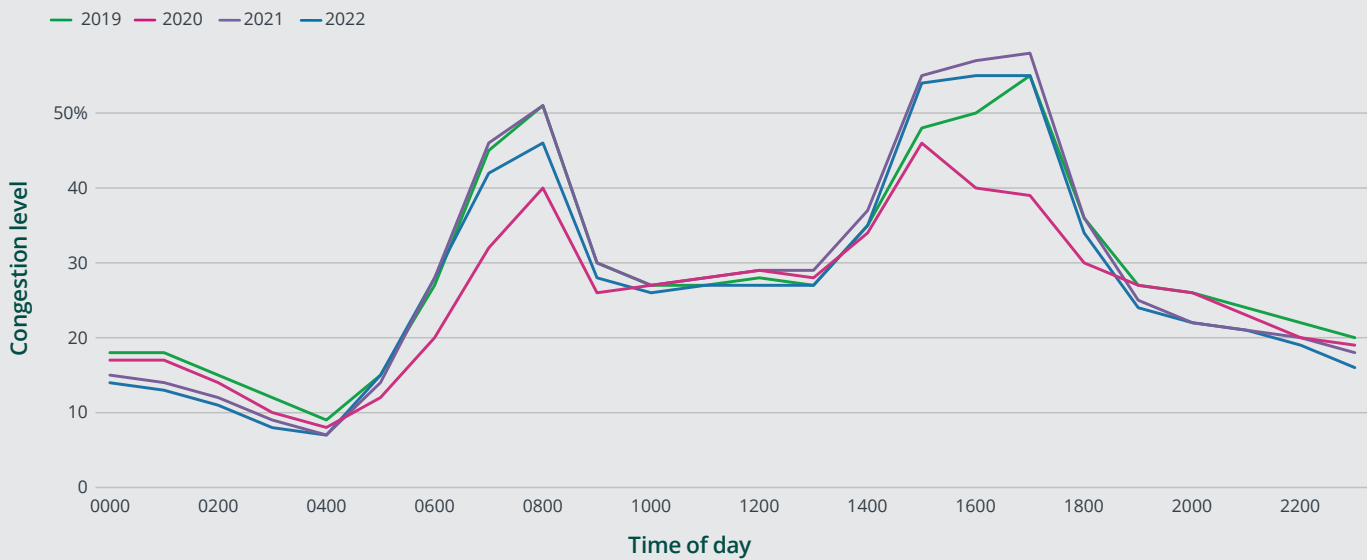
MELBOURNE



SYDNEY



BRISBANE



* TomTom traffic data

Flexible commute

Our most recent findings indicate there has been a significant increase in the availability of flexible work since the start of the pandemic.

At the start of 2021, one year into the pandemic, we asked people in Melbourne, Sydney and Brisbane about their access to flexible work pre-pandemic and whether they thought it might change once the risk of COVID-19 passed (see [Urban Mobility Trends from COVID-19](#) report February 2021 edition). One type of flexible work we looked at was varied start and finish times. We found that 37% had access to varied start and finish times pre-pandemic, which is substantially lower than the 71% who report having access today (Figure 11).

Of the 71% with access to varied start and finish times in the Australian cities surveyed, over 90% take up the option to avoid commuting in the AM and/or PM peak. For the 10% who choose not to avoid travelling in peak traffic, 18% believe the travel-time savings are not significant enough to justify the change (Figure 12).

We know that small shifts in when people travel can add up to significant travel-time savings. We provide customers with information about the best time to travel on our roads in order to maximise their travel-time savings on the [Transurban Insight hub](#).

Key findings

Most people (70%+) have the option to work flexibly to avoid peak traffic times, and the majority of those take up the option to work flexibly (at least a few times a month) to avoid peak traffic times.

For those without access to flexible work practices, most would find the option of varied start and finish times for work or study helpful in scheduling their travel outside peak traffic times.

For those with access to flexibility, but who do not currently use it to avoid peak traffic times, the main reasons were due to a preference for working from their workplace during standard hours, and a need to be able to make personal commitments before and/or after work.

FIGURE 11: AVAILABILITY AND UPTAKE OF VARIED START AND FINISH TIMES

AUSTRALIA

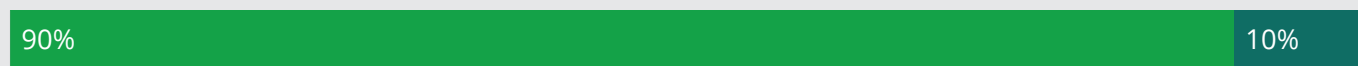
■ Yes ■ No ■ Not sure

Can you work/study flexibly to avoid peak traffic times?



Of the 71% who can work/study flexibly

Do you work/study flexibly (at least a few times a month) to avoid peak traffic times?



Of the 29% who can't work/study flexibly

If you had access to flexible start/finish times would you work/study flexibly to avoid peak traffic times?



GREATER WASHINGTON AREA

■ Yes ■ No ■ Not sure

Can you work/study flexibly to avoid peak traffic times?



Of the 73% who can work/study flexibly

Do you work/study flexibly (at least a few times a month) to avoid peak traffic times?



Of the 27% who can't work/study flexibly

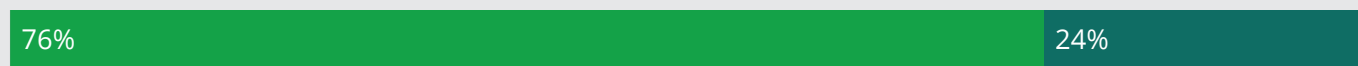
If you had access to flexible start/finish times would you work/study flexibly to avoid peak traffic times?



MONTREAL

■ Yes ■ No ■ Not sure

Can you work/study flexibly to avoid peak traffic times?



Of the 76% who can work/study flexibly

Do you work/study flexibly (at least a few times a month) to avoid peak traffic times?



Of the 24% who can't work/study flexibly

If you had access to flexible start/finish times would you work/study flexibly to avoid peak traffic times?



FIGURE 12: REASONS FOR NOT TAKING UP THE OPTION OF VARIED START AND FINISH TIMES

■ Australia ■ Greater Washington Area ■ Montreal

I prefer working from my workplace during standard 9–5 business hours



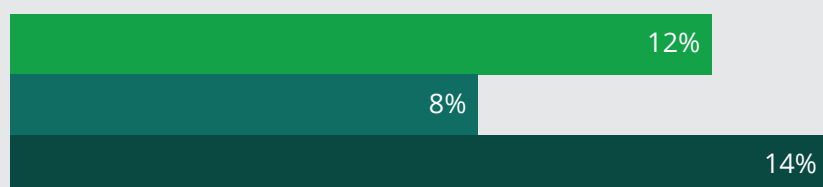
The travel time saved isn't significant enough



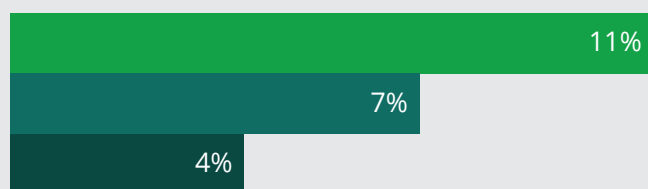
I have before and after work commitments



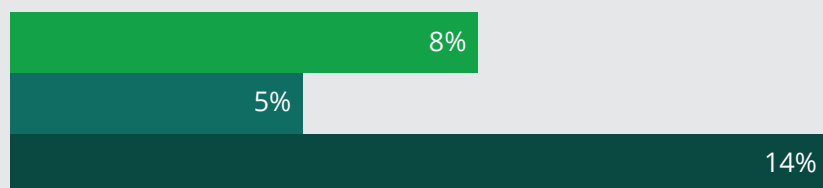
I don't know how much travel time I could save



I have to get my children to and from care/school, so can rarely start earlier or finish later to avoid peak traffic



Other



Private vehicles: access and ownership in Australia

It is clear there are a variety of reasons people use roads to get around their city. But we went one step further to determine what activities actually require a driver's licence to complete or participate in. For most people in the Australian cities we surveyed, a driver's licence is a necessity to run errands such as going to the shops or attending medical appointments (Figure 13). Nearly half of all respondents said they need a driver's licence to participate in social activities and as a requirement of their job.

Gaining a driver's licence takes many hours of practice and must be overseen by a supervisor with a valid driver's licence. In Australia, most people learn how to drive from their parents, a guardian and/or paid instructor (Figure 15). However, not everyone has someone available to teach them how to drive, or the means to be able to pay for lessons. This can present barriers to employment and participation in social events. To help overcome this Transurban works with driver training schools to provide free driving lessons to those who need them most, find out more [here](#).

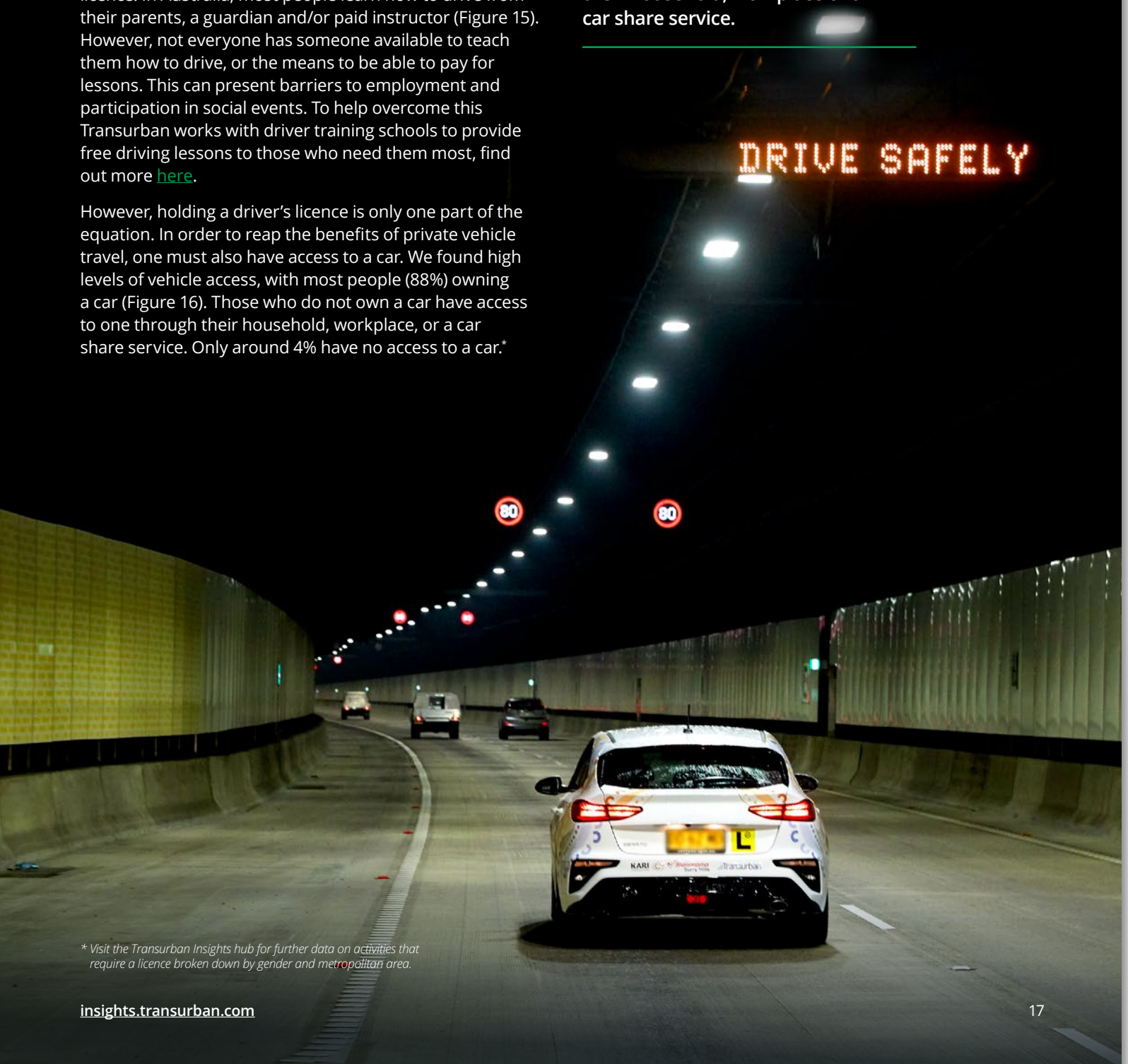
However, holding a driver's licence is only one part of the equation. In order to reap the benefits of private vehicle travel, one must also have access to a car. We found high levels of vehicle access, with most people (88%) owning a car (Figure 16). Those who do not own a car have access to one through their household, workplace, or a car share service. Only around 4% have no access to a car.*

Key findings

46% of respondents in the Australian cities surveyed need a driver's licence as a requirement of their job.

Most people are taught how to drive by a parent/guardian, or a paid instructor.

Most people (96%) either own a car or have access to one through their household, workplace or a car share service.



* Visit the Transurban Insights hub for further data on activities that require a licence broken down by gender and metropolitan area.

FIGURE 13: ACTIVITIES THAT REQUIRE A DRIVER'S LICENCE

AUSTRALIA

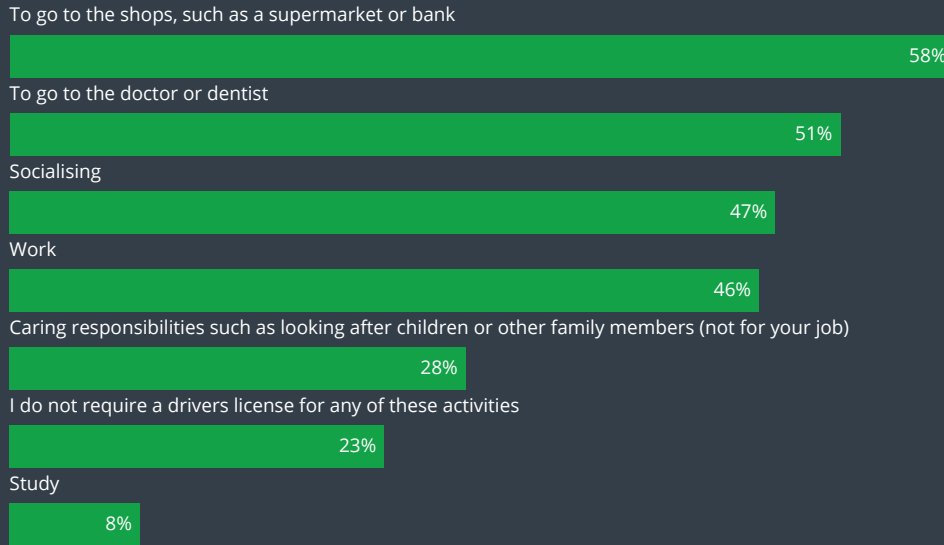
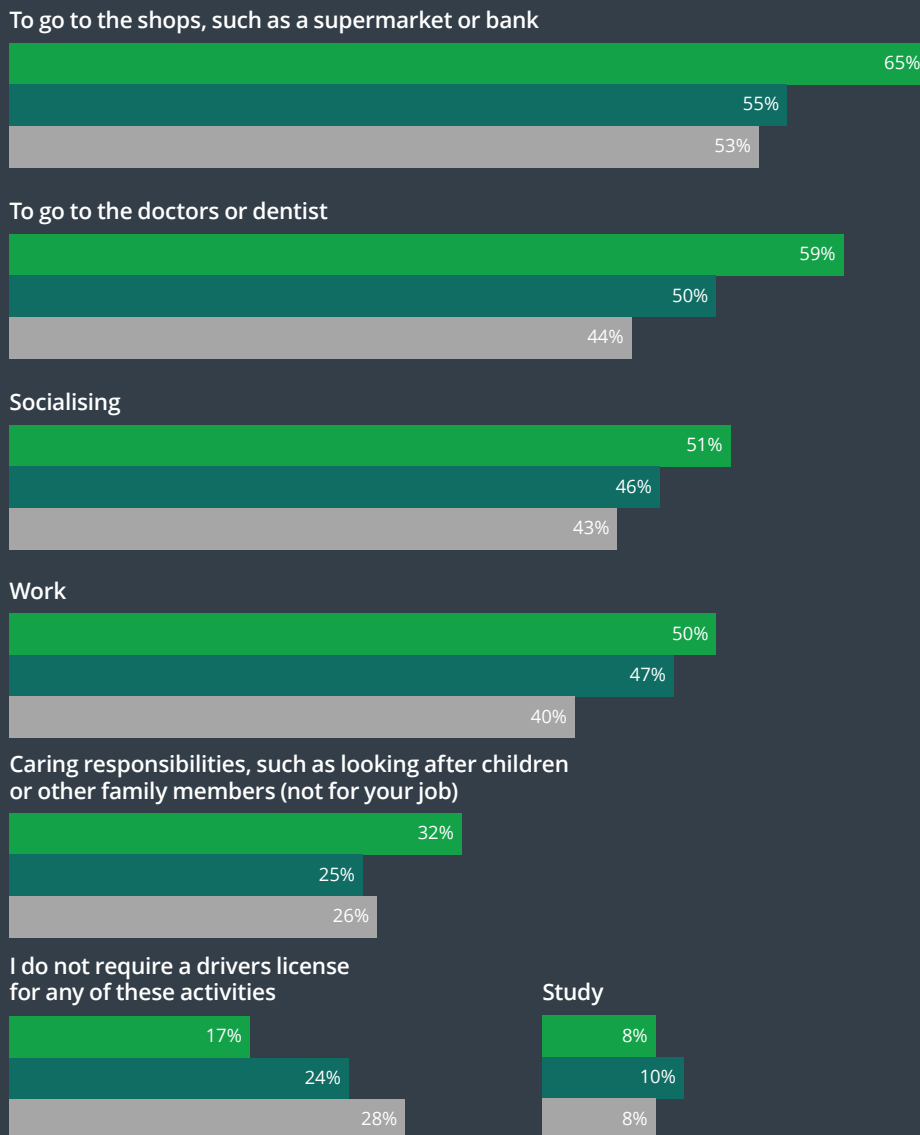


FIGURE 14: ACTIVITIES THAT REQUIRE A DRIVER'S LICENCE

Brisbane Melbourne Sydney



Demographic deep dive



More women (57%) than men (49%) learn to drive with a paid instructor.



Of the respondents who learned from a volunteer, 42% come from households with an annual income below \$60,000.



The percentage of people learning how to drive from parent/guardian has increased over the years: 41% for respondents aged 60+, 55% for 45 to 59, 56% for 30 to 44, and 74% for 18 to 29.



More respondents from Brisbane require a licence to complete everyday errands or as a requirement of their job when compared to Melbourne or Sydney.

FIGURE 15: PEOPLE WHO HELPED YOU LEARN HOW TO DRIVE

AUSTRALIA

A parent or guardian

57%

A paid instructor

53%

Another family member

14%

A friend

10%

Someone else

2%

A volunteer

1%

FIGURE 16: CAR OWNERSHIP AND ACCESS

	AUSTRALIA	SYDNEY	MELBOURNE	BRISBANE
Yes	88%	85%	88%	90%
No, but I have access to a car through my household	7%	9%	7%	6%
No, but I have access to a car through my workplace	1%	1%	0%	1%
No, but I have access through paid services (e.g. car share)	1%	1%	1%	0%
No	4%	5%	4%	3%

Section 3: What's influencing travel



The **price of fuel** has the greatest impact on planning for long trips



Reliability of travel time, ease of access and safety are the highest-ranking factors people consider when making transport choices



Most people do not consider the **sustainability of their transport choices** when making decisions

This section looks at the different factors people consider when making transport choices.

What's most important

Over half of the respondents from the Australian cities surveyed rank reliability of travel times as one of the top-three factors they consider when choosing which mode of transport to use, which puts it in equal first place with ease of access (Figure 17).

In North America, the highest-ranking factor for respondents in the Greater Washington Area and Montreal are safety and ease of access, respectively.

Sustainability ranks low across all surveyed markets, which aligns to other findings from this survey. We explored people's attitudes towards environmental impact of their transport choices and found most people are ambivalent about the greenhouse gas emissions from their chosen mode of transport, and that greenhouse gas emissions do not factor into their transport choices (see 'Environmental impact' on page 29).

Key findings

Reliability of travel time and ease of access are the highest-ranking factors people consider in the Australian cities surveyed. Safety is the highest-ranking factor people consider in the Greater Washington Area.

Ease of access is the highest-ranking factor people consider in Montreal. Ease of access ranks high across all surveyed cities, and slightly more respondents living in outer suburbs than those living in middle suburbs and inner suburbs.⁸

Affordability is more of a concern for those living in the inner suburbs compared to those living in middle suburbs and outer suburbs.⁹

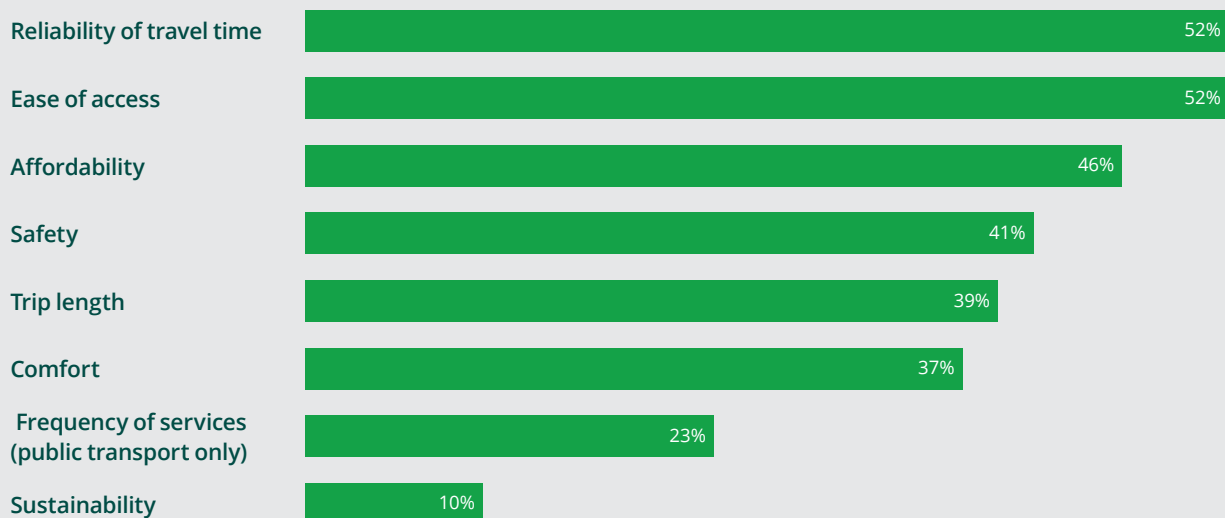
More women rank safety as one of the top-three factors they consider than men.

⁸ Outer suburbs defined in the survey as 'a moderate drive from the city centre', middle suburbs defined as 'a short drive from the city centre' and inner suburbs defined as 'a moderate drive in and around the city centre'

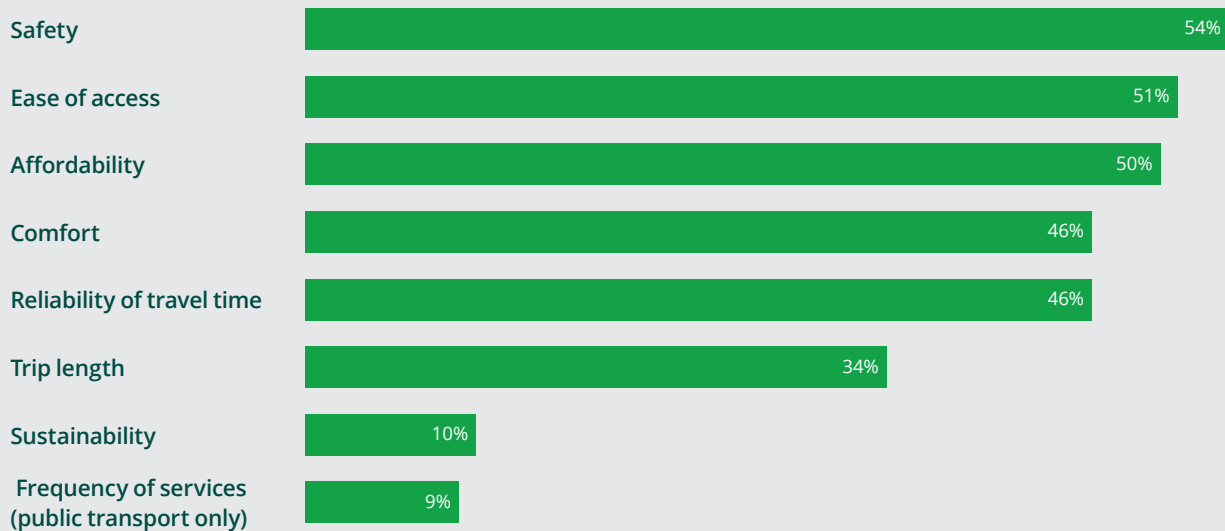
⁹ See above.

FIGURE 17: TOP FACTORS IMPORTANT TO PEOPLE—SORTED MOST-TO-LEAST IMPORTANT BY PEOPLE WHO RANKED THIS A TOP-THREE CONSIDERATION

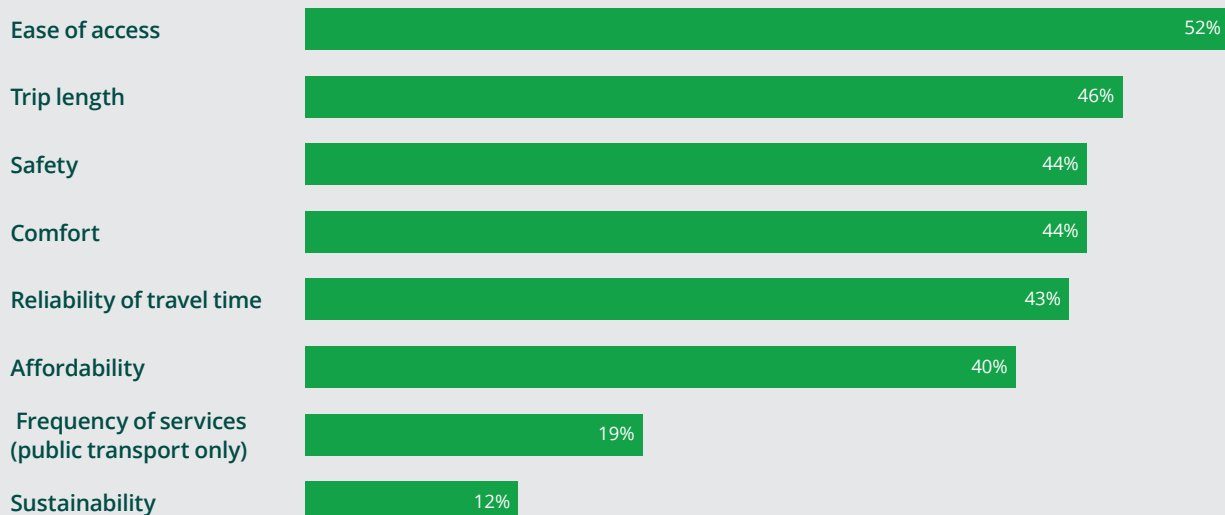
AUSTRALIA



GREATER WASHINGTON AREA



MONTREAL



Transport costs

Fuel ranks as the top cost of living concern overall for Australians, and the top transport-related concern for respondents in North America (Figure 18). This result is unsurprising given the high fuel prices currently being experienced across Australia and North America. For example, at the time the survey was in market, the average price for E10 regular unleaded petrol in NSW ranged between \$2.02 to \$2.11.¹⁰ This price also takes into account the temporary halving of fuel excise to 22.1 cents, which is due to be reinstated to 46 cents at the end of September.

Visit the [Transurban Insights hub](#) for further data on cost of living concerns broken down by gender and age.

Key findings

The top cost of living concern for respondents in the Australian cities surveyed is fuel, with 63% ranking it as a top-five concern.

The top cost of living concern for respondents in North America is groceries, with 66% of respondents in the Greater Washington Area and 65% in Montreal ranking it as a top five concern.

Fuel, vehicle registration, vehicle maintenance and vehicle repayments are the top transport-related concerns. Tolls rank #5 out of eight transport-related costs.

¹⁰ NRMA, Weekly Fuel Report



FIGURE 18: CONCERN ABOUT TRANSPORT COSTS COMPARED TO OTHER COMMON HOUSEHOLD EXPENSES

■ *Transport-related costs* ■ *Other common household expenses*

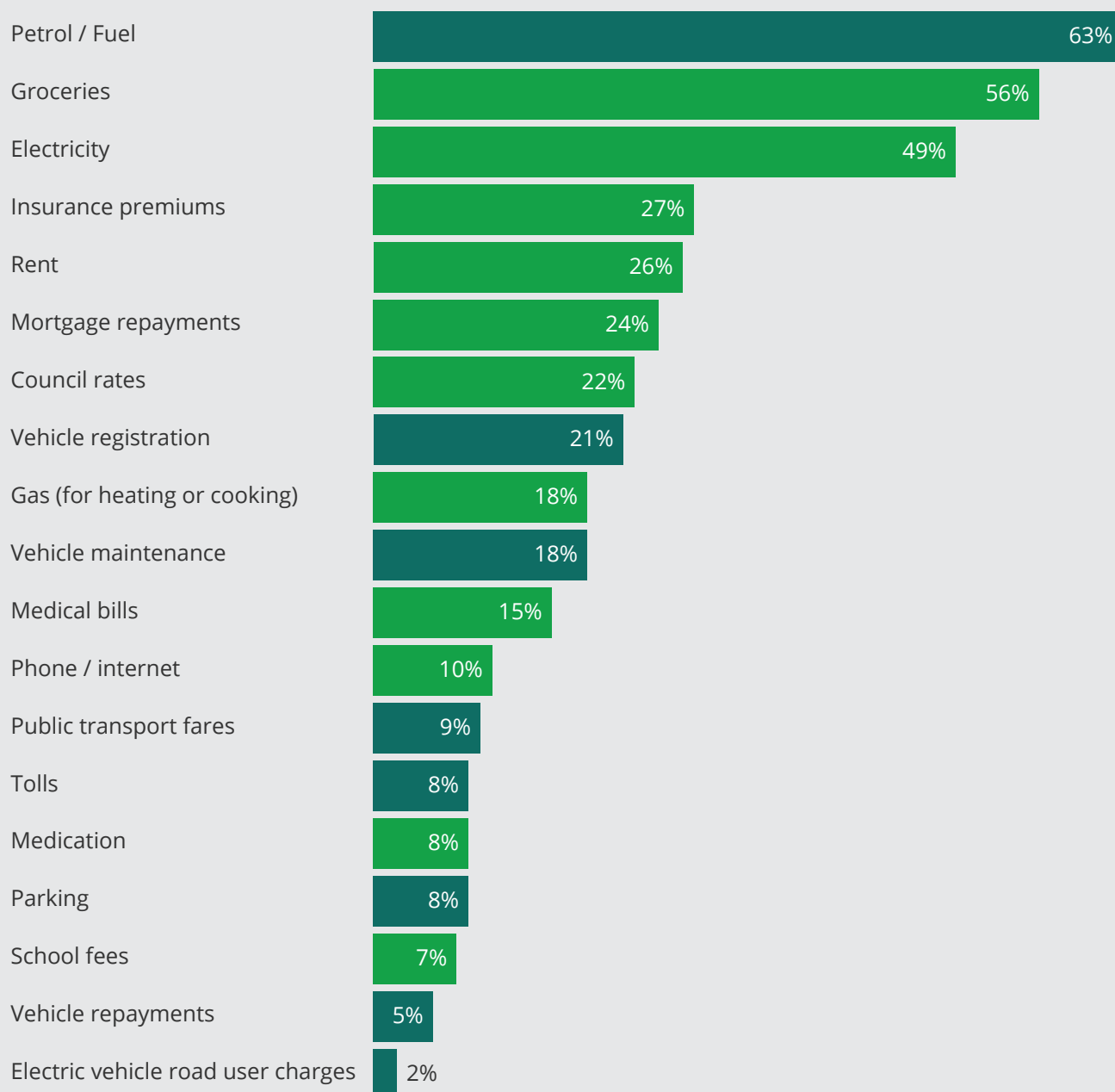
AUSTRALIA

FIGURE 18: CONCERN ABOUT TRANSPORT COSTS COMPARED TO OTHER COMMON HOUSEHOLD EXPENSES (CONTINUED)

■ *Transport-related costs* ■ *Other common household expenses*

GREATER WASHINGTON AREA

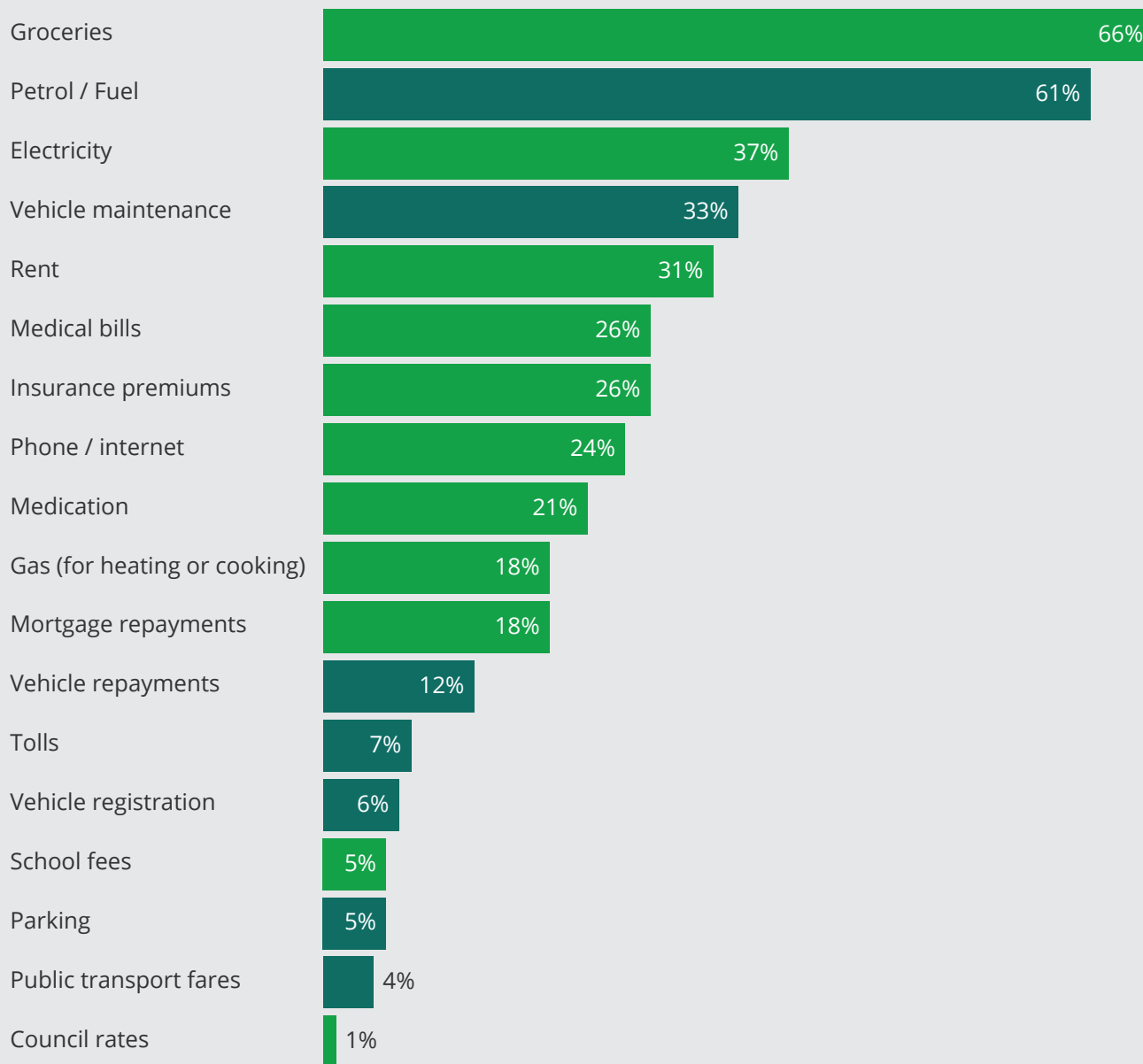
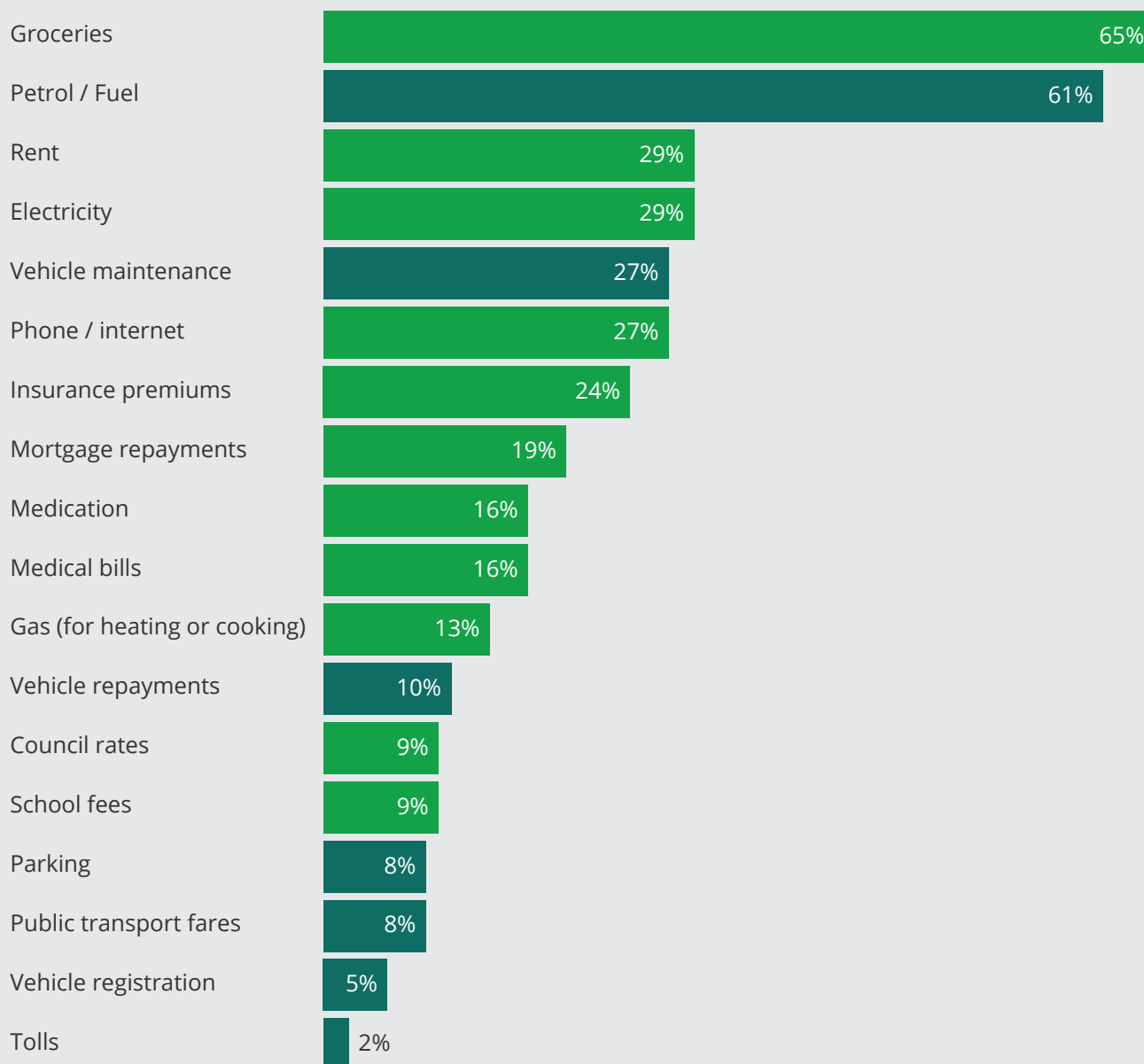


FIGURE 18: CONCERN ABOUT TRANSPORT COSTS COMPARED TO OTHER COMMON HOUSEHOLD EXPENSES (CONTINUED)

■ *Transport-related costs* ■ *Other common household expenses*

MONTREAL



Cost of fuel

Despite the price of fuel being a top concern (see 'Transport costs' pages 22 to 25) the majority of respondents do not consider, or only occasionally consider, the price of fuel when making short trips or commuting. The price of fuel is a considerable factor when planning long trips (Figure 19).

The price of fuel is also a driver of when people chose to refuel in Australia, with 33% waiting to refuel until they see a low fuel price (Figure 20). Nearly 1 in 5 admit to waiting to refuel until the fuel empty light appears on their dashboard.

Running out of fuel on a motorway can have significant consequences on traffic flow and result in increased congestion. Transurban's Incident Response Teams help motorists who have run out of fuel on our roads by giving them a top up. This helps to ensure the motorists can move safely off the motorway and clears congestion for other motorists. In 2021 on CityLink alone, we responded to one out-of-fuel incident a day. We regularly run driver awareness campaigns around the importance of ensuring people have enough fuel to reach their destination safely.

Key findings

The price of fuel has the greatest impact on planning for long trips across all surveyed cities.

Most respondents say they do not consider, or only occasionally consider, the price of fuel when making short trips or commuting.

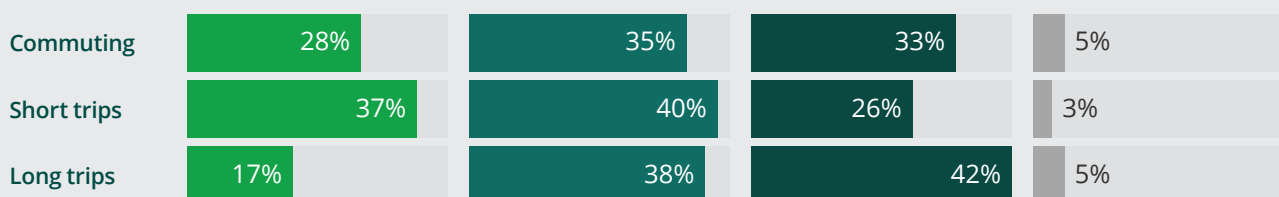
Respondents in the Australian cities surveyed are more likely to wait to fill up the fuel tank until they see a low price than those in North America.

18% of respondents in the Australian cities surveyed wait until their fuel light comes on to refuel their vehicles.

FIGURE 19: INFLUENCE OF FUEL PRICE ON TRAVEL CHOICES

■ Not at all ■ Occasionally ■ All the time ■ I'm not sure

MELBOURNE



SYDNEY

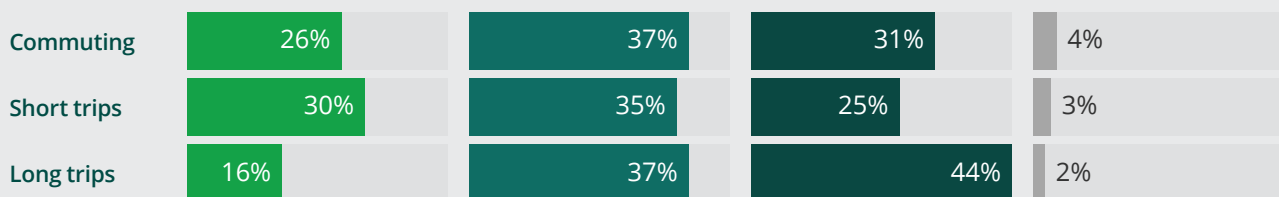
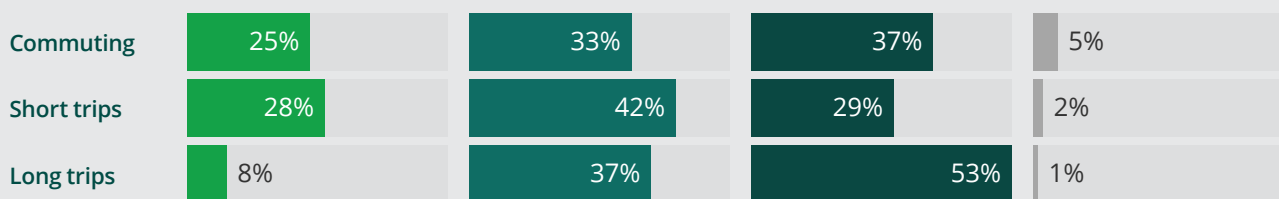


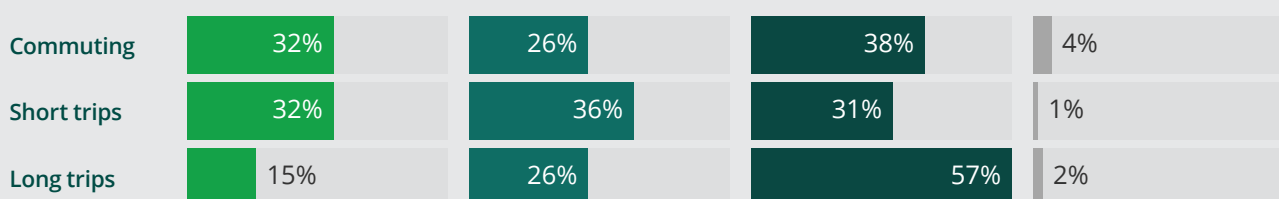
FIGURE 19: INFLUENCE OF FUEL PRICE ON TRAVEL CHOICES (CONTINUED)

■ Not at all ■ Occasionally ■ All the time ■ I'm not sure

BRISBANE



GREATER WASHINGTON AREA



MONTREAL

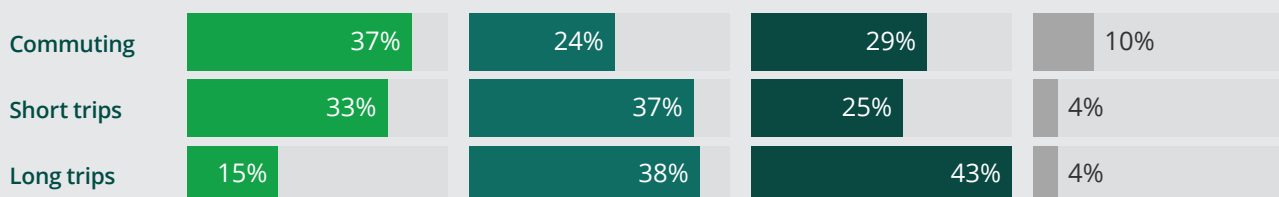


FIGURE 20: WHEN PEOPLE CHOOSE TO REFUEL

AUSTRALIA

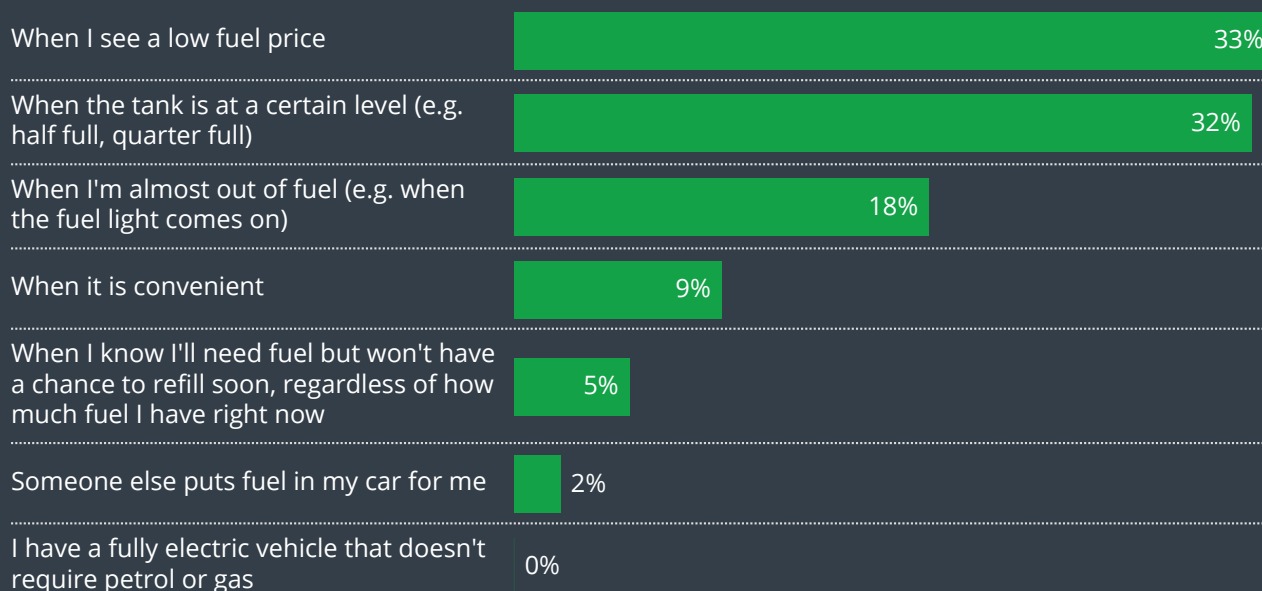
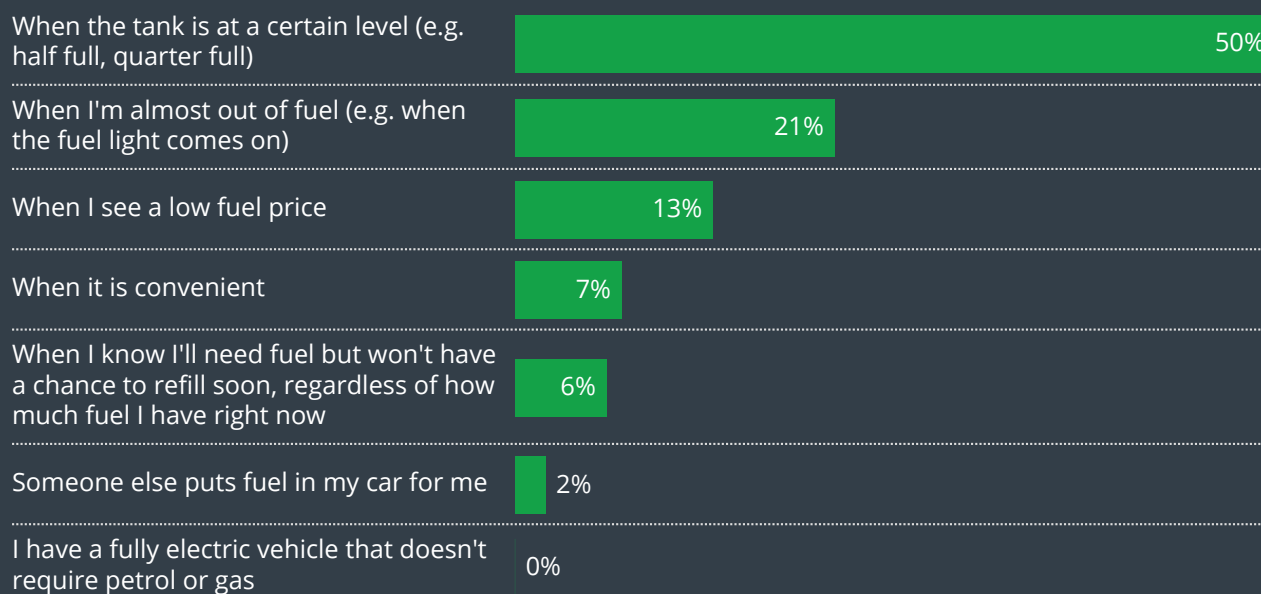
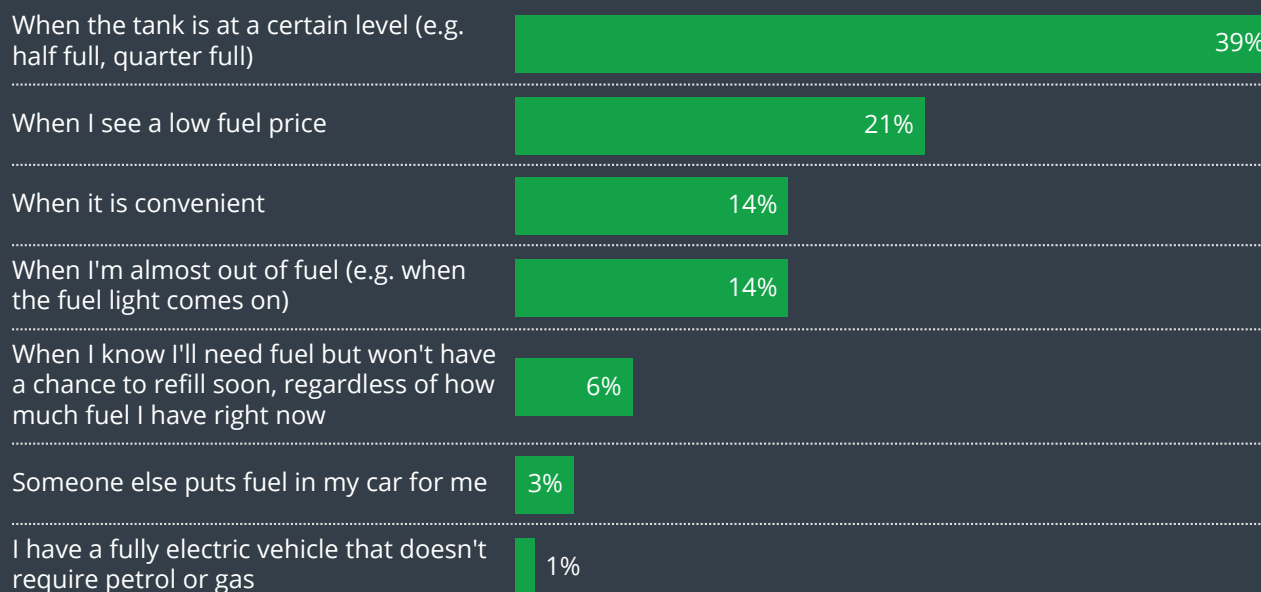


FIGURE 20: WHEN PEOPLE CHOOSE TO REFUEL (CONTINUED)

GREATER WASHINGTON AREA



MONTREAL



Environmental impact

Despite high levels of concern for climate change (see 'Public priorities', page 30 and 31), most respondents are ambivalent about the greenhouse gases emitted from their chosen mode of transport, (Figure 21). Furthermore, most respondents say greenhouse gas emissions produced by different modes of transport do not factor into their transport choices, or only do so occasionally and when prompted (Figure 22).

These findings are consistent with previous research (see [Urban Mobility Trends from COVID-19](#) report February 2022 edition) and suggest a disconnect between people's general concern for climate change, and their understanding about how they can act to reduce their own carbon footprint. With 9.7 million customers across Australia and North America, Transurban can play an important role in educating motorists about how to reduce their greenhouse gas emissions, find out more [here](#). We are also running customer experience programs to help educate people on the benefits of switching to electric vehicles.

Key findings

35% of respondents in the Australian cities surveyed care about greenhouse gas emissions from their chosen types of transport, 39% are neutral and 26% do not care.

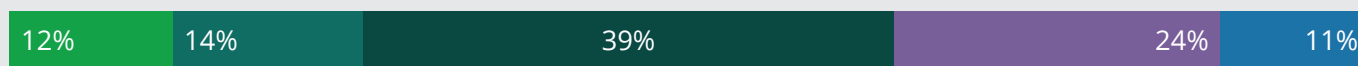
37% of respondents in the Greater Washington Area care about greenhouse gas emissions from their chosen types of transport, 36% are neutral, and 26% do not care.

37% of respondents in Montreal care about greenhouse gas emissions from their chosen type of transport, 42% are neutral, and 21% do not care.

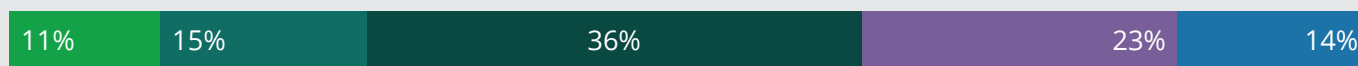
FIGURE 21: LEVEL OF CONCERN REGARDING GREENHOUSE GAS EMISSIONS FROM TRANSPORT

1 (I don't care at all) 2 3 4 5 (I care very much)

AUSTRALIA



GREATER WASHINGTON AREA



MONTREAL

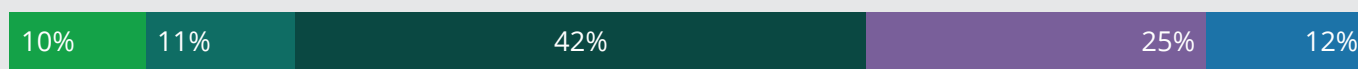


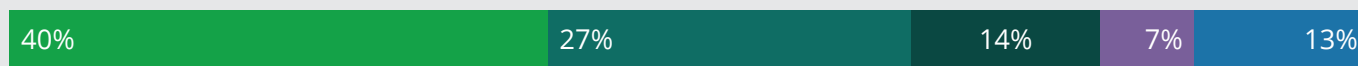
FIGURE 22: DO GREENHOUSE GAS EMISSIONS INFLUENCE TRANSPORT CHOICES?

Not at all Not usually (e.g. only when prompted) Only for modes of transport I use regularly (e.g. commuting to work) Only for modes of long-haul travel (e.g. trips more than a few hours away) Yes, for all modes of transport

AUSTRALIA



GREATER WASHINGTON AREA



MONTREAL



Section 4: Transport infrastructure



74% admitted to knowing nothing at all or only a little about how the construction and maintenance of roads is funded*



79% believe governments should work with the private sector to fund the delivery of new roads and major upgrades to existing roads, with most thinking it should be a mix of public and private investment*



≤21% of respondents can accurately identify how much they pay in fuel excise / fuel tax

This section looks at people's attitudes towards infrastructure development.

Public priorities

Cost of living is the number one issue that respondents across the Australian cities surveyed, the Greater Washington Area and Montreal want addressed as global inflation starts to hit the 'hip-pocket' and erodes household budgets (Figure 23). While the number of respondents who nominate hospitals/healthcare as a top issue has decreased since we asked the same question in January 2022, it is still the second biggest issue for respondents in the Australian cities surveyed and Montreal (housing affordability and supply is the second biggest issue in the Greater Washington Area).

However, government budgets are now in a weaker position to respond to these issues than they were heading into the pandemic. This is due to the high levels of debt incurred to support the community through the pandemic such as the provision of financial assistance to workers and businesses affected by lockdowns and restrictions.

In his pre-Budget economic update, Australia's Federal Treasurer, The Hon. Dr Jim Chalmers MP, emphasised the need for responsible budget repair to address Australia's trillion dollars of debt; the highest level of debt as a share of the economy since the aftermath of the Second World War.¹¹ The burden of this debt on Australia's budget will be exacerbated as interest on the repayments increase.

One solution is to capitalise on private investment to help lift productivity and complement government spending. We found high levels of support for government using a mix of private and public investment to deliver critical transport infrastructure (see 'How to fund transport infrastructure' page 32).

Key findings

Top issues for respondents in the Australian cities surveyed are cost of living, hospitals/healthcare and housing affordability/supply.

Top issues for respondents in the Greater Washington Area are cost of living, jobs/economic growth, and fuel bills.

Top issues for respondents in Montreal are cost of living, hospitals/healthcare, and climate change.

¹¹ Australian Government Treasury (2022, July 28), Ministerial Statement on the Economy

* Weighted average across all cities surveyed

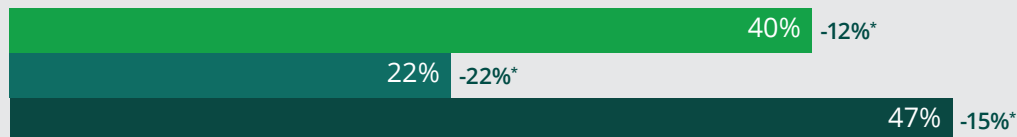
FIGURE 23: ISSUES THAT CURRENTLY REQUIRE FOCUS, COMPARED TO WHEN WE ASKED THE SAME QUESTION IN JANUARY 2022

■ Australia ■ Greater Washington Area ■ Montreal

Cost of living



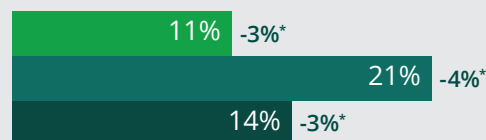
Hospitals/healthcare



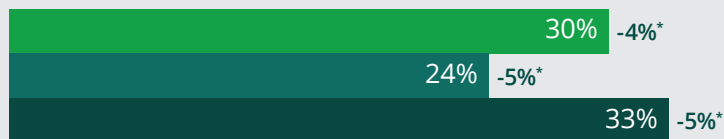
Housing affordability/housing supply



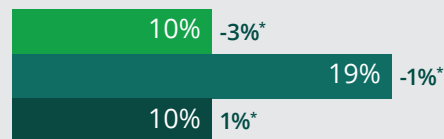
Education/schools



Climate change



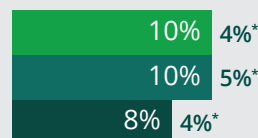
Community safety



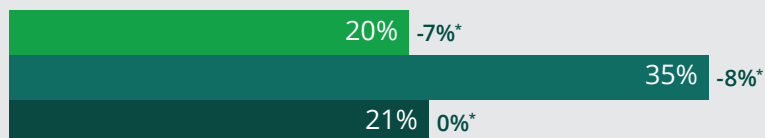
Fuel bills



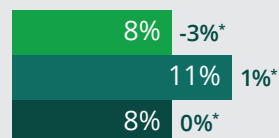
Road safety



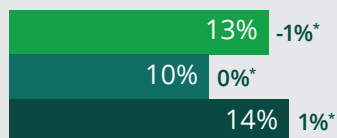
Jobs/economic growth



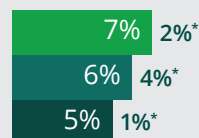
Supporting vulnerable and/or marginalised communities



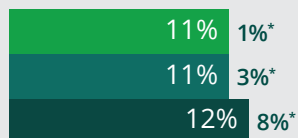
Ageing population



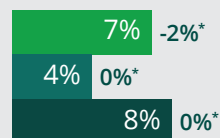
Public transport



Road infrastructure/road congestion



Biodiversity and ecosystems



* Percentage increase and decrease since January 2022

How to fund transport infrastructure

Fuel excise is collected by governments to fund the development of new roads and the maintenance of existing infrastructure.

Rising fuel prices across Australia and North America have shone a spotlight on the cost of fuel taxes applied at petrol stations. This has been driven by high-profile programs such as the temporary halving of fuel excise in Australia.

Despite the significant media coverage of the issue, awareness of the role fuel excise plays in road funding remains low, as does awareness of the cost of fuel excise. In Australia, only 20% of respondents can accurately identify the cost of fuel excise, which is only 6 percentage points higher than when we asked the same question this time last year (prior to the Federal Government temporarily halving the cost of fuel excise).

Low awareness of how roads are funded will make it difficult for governments to mount a case for much-needed reform as revenue from fuel excise begins to decline. The challenge facing governments is that as vehicles on our roads become newer and more economical, they use less petrol and therefore pay less fuel excise. This will leave governments with less excise to pay for new roads and the maintenance of existing road infrastructure. For more information on consumer attitudes towards road funding reform check out the August 2021 edition of our [Urban Mobility Trends report](#).

Key findings

Most people know nothing at all, or only a little about how the construction and maintenance of roads is funded.

Most people cannot accurately identify the cost of fuel excise.

Most people believe governments should work with the private sector to fund the delivery of new roads and major upgrades to existing roads, with the majority thinking it should be a mix of public and private investment.

FIGURE 24: ROLE OF PRIVATE SECTOR IN FUNDING THE DELIVERY OF TRANSPORT INFRASTRUCTURE

■ Australia ■ Greater Washington Area ■ Montreal

Governments should allow a mix of government and private investment to fund the delivery of all new roads and major upgrades to existing roads



Governments should never allow private investment to fund the delivery of all new road and major upgrades to existing roads



Governments should allow private investment to fund delivery of all new road and major upgrades to existing roads



FIGURE 25: LEVEL OF UNDERSTANDING ABOUT HOW THE CONSTRUCTION OF ROADS IS FUNDED

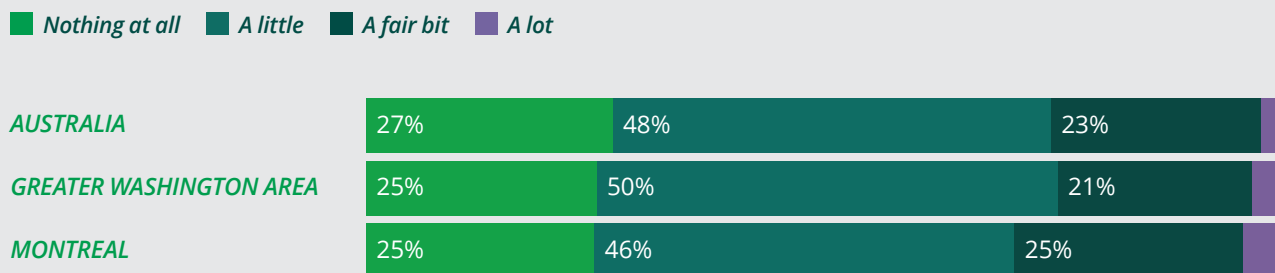


FIGURE 26: AWARENESS OF FUEL EXCISE APPLIED TO UNLEADED PETROL AND DIESEL AT PETROL STATIONS

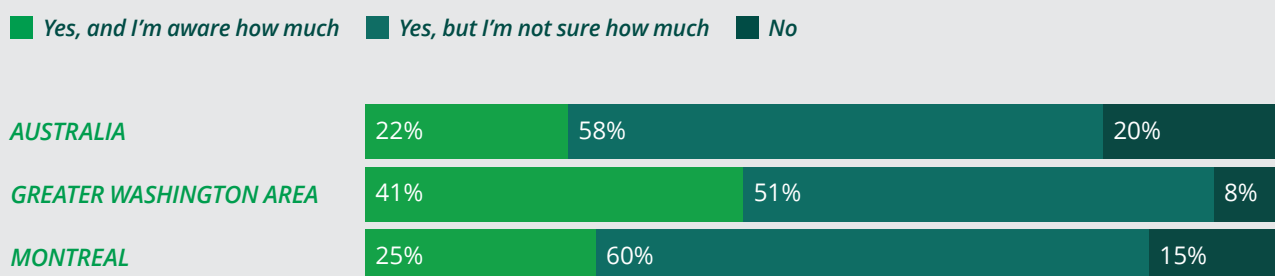
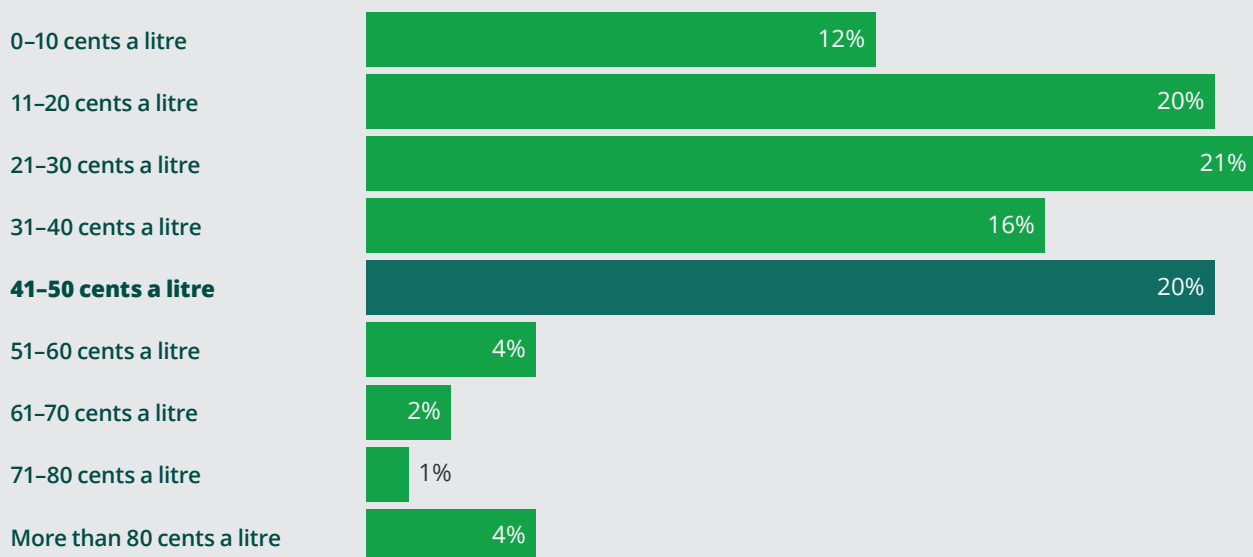


FIGURE 27: AWARENESS OF COST OF FUEL EXCISE PER LITRE OF PETROL/DIESEL*

AUSTRALIA



*Fuel excise at the time of the survey (Jul 2022) had been temporarily halved to 22.1 cents per litre; respondents were asked to identify the original, full excise amount—which was 44.2 cents per litre

FIGURE 28: AWARENESS OF COST OF FUEL TAX PER GALLON OF PETROL/GASOLINE

*GREATER WASHINGTON AREA**

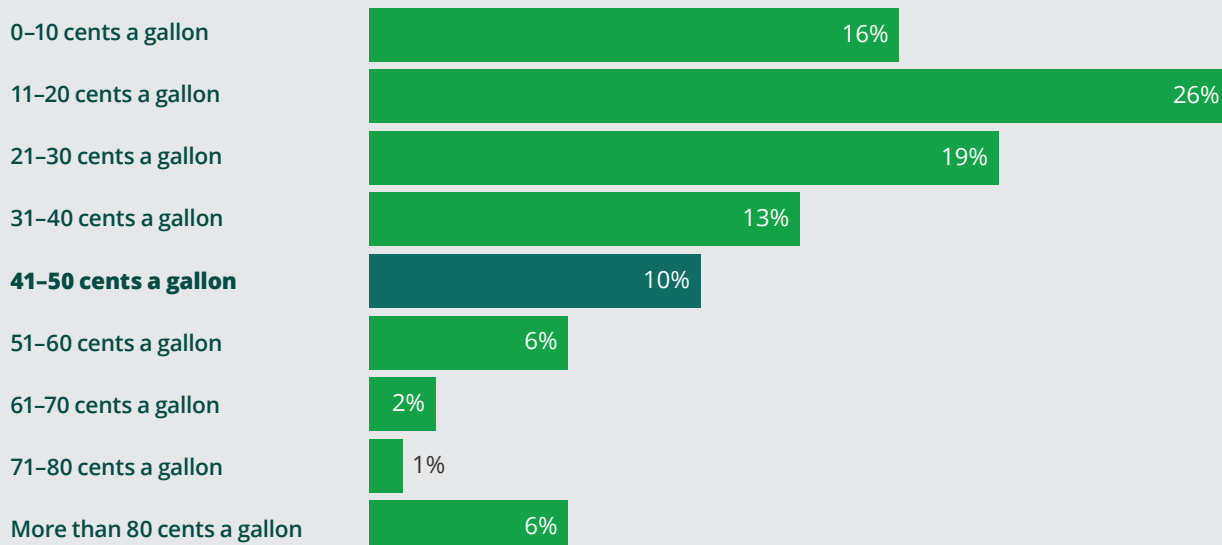
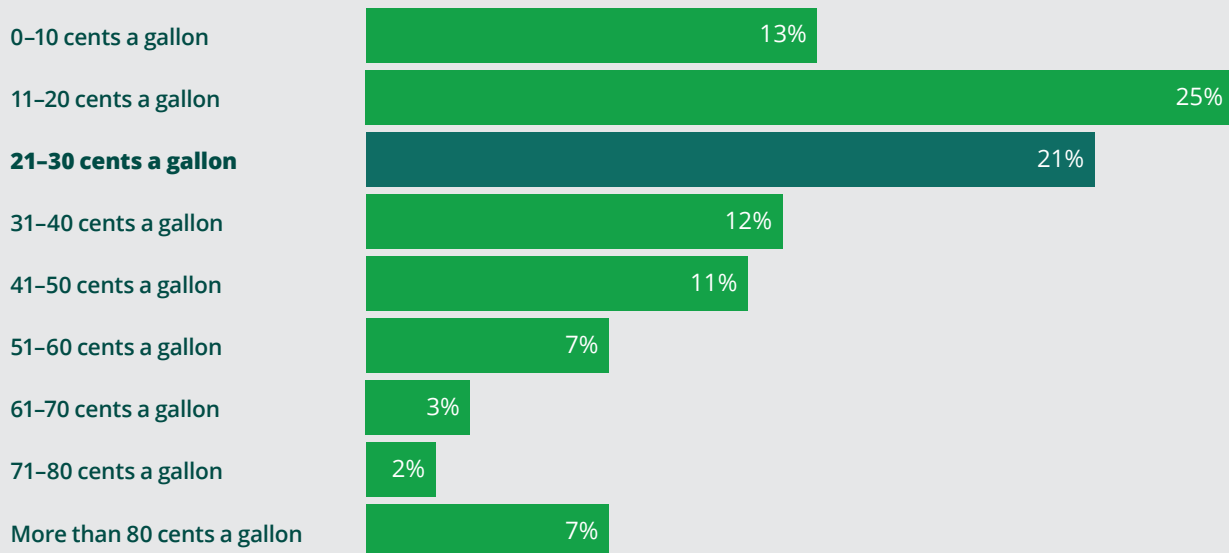


FIGURE 29: AWARENESS OF COST OF FUEL TAX PER GALLON OF PETROL/GASOLINE

MONTREAL†



* Fuel excise is 46.3 cents per gallon in Virginia and 47.2 cents per gallon in Maryland

† Fuel excise is 29.2 cents per gallon

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