



INDUSTRY REPORT

Urban Mobility Trends

August 2024 edition

Every year we survey thousands of people in cities across Australia and North America about a broad range of factors that influence their mobility choices.



Our Urban Mobility Trends reports track people's transport habits and preferences, as well as related factors such as their concern about congestion and transport costs – allowing us to observe trends over time.

We share our findings with government and industry to contribute to transport planning and policy development.

Research

Online survey conducted between 30 May and 1 July 2024

5,028 respondents aged 18+ with a driver's licence from Australia, including Melbourne, Sydney, Brisbane; and North America, including the Greater Washington Area covering Virginia and Maryland (United States) and Montreal (Canada)

Survey commissioned by Transurban and conducted by Nature

53%+

of respondents drive every day

3.9

average days people travel to their workplace each week, with 15% expecting to increase commuting over the next 12 months

70%

of respondents from the Australian cities surveyed are concerned about rising levels of congestion (54% in the North American regions surveyed)

Executive Summary

People have settled into daily travel routines and most are heading to their workplace almost four days a week, our latest Urban Mobility Report research shows.

More than 60% of Australians use their private vehicle to commute, while 82% of people in the Greater Washington Area rely on their vehicle to get to work.

Around 15% expect they will be travelling to their workplace more often over the next year.

Employer requirement is the main reason people expect to increase the number of days they travel to workplaces, which is consistent with last year's findings.

Around 40% of Australian respondents cited increased productivity and collaboration with their colleagues as a reason to travel to the workplace more in the next 12 months.

When it comes to travelling a few times a week, people are out and about more often, using their vehicle and public transport.

The number of people driving a few times a week has increased 3% to 33% while public transport use has risen 5% to 30%.

This year's research again found the price of fuel to be the second highest cost-of-living concern across all cities surveyed, following groceries, despite a slight drop in North America.

However, in Australia, 71% of commuters do not, or only occasionally, consider the price of fuel when making decisions about their daily trips. In North America, almost half of daily commuters do not consider the price of fuel when making travel decisions.

Traffic congestion both now and in the future remains a major concern for most respondents. More than 70% of Australians surveyed are concerned about current levels of congestion, with 80% fearing it will be worse in a decade. Melburnians and Brisbanites are most worried with almost half of respondents "completely concerned" about congestion in 10 years' time and the ability for transport infrastructure to keep pace with population growth.

In North America, 54% are concerned about congestion now, and even more - 63% - are concerned about the levels of gridlock they may face in a decade.

Population growth is likely to put further pressure on transport infrastructure with the biggest increases concentrated in urban areas.

Transport infrastructure is one of many public priorities competing for government funding at a time when budgets are constrained by high levels of debt.

In Australia, 65% of respondents think that governments should meet their infrastructure needs through a mixture of public and private funding. While in the United States, 68% of respondents favour this funding mechanism.



Section 1: Travel behaviour



50%+ use private vehicles every day



More people are driving several times a week compared to our July 2023 survey



Respondents from the Greater Washington Area and Brisbane report the **highest levels of daily driving** across all surveyed cities

This section looks at which modes of transport people choose to move around cities.

How people get around

On average, more than half of respondents use private vehicles every day to get around, with those from the Greater Washington Area and Brisbane recording the highest levels of daily driving across all surveyed cities (Figure 1).

While levels of daily driving remained consistent since our 2023 survey, there has been a slight increase in the rates of those driving a few times a week, with a rise from 30% to 33% (Figure 2).

It is a similar story for public transport use. While daily public transport use was down slightly in some cities compared to last year's survey, there was an increase in the amount of people using public transport a few times a week, with a lift of 7% in Australia to 42% of people who use public transport a few times a week.

Respondents in all cities surveyed say they plan on using public transport more in 2025, with the rates of both daily and 'a few times a week' use expected to increase. This could reflect the growing concern people have about congestion now and in 10 years' time (see section 4).

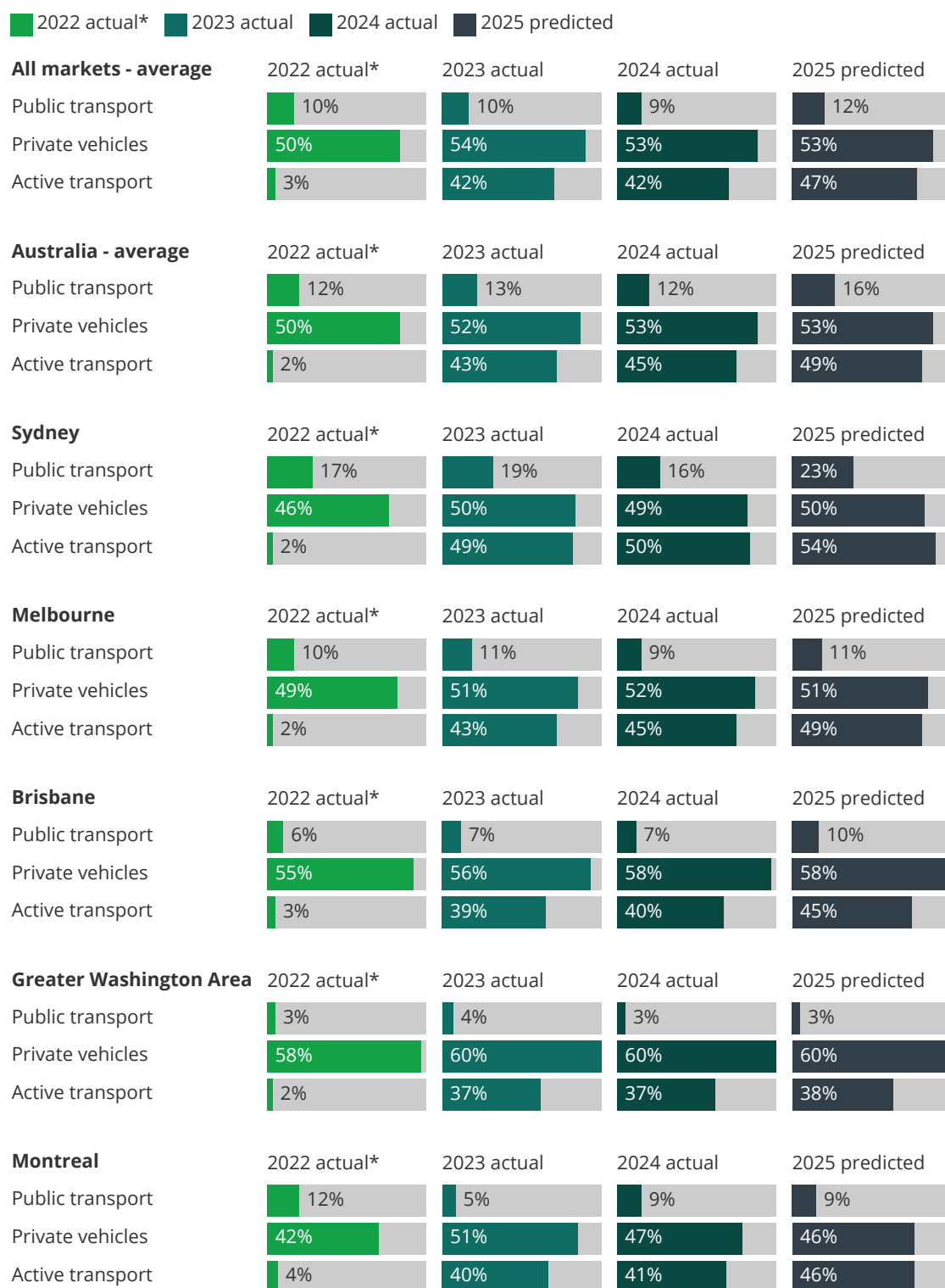
While people's expectations vary slightly by city, daily use of private vehicles is generally expected to remain the same in 2025 or increase slightly. This comes as vehicle sales and registration rates in Australia continued to grow last year.

More than 1.2 million new vehicles were sold in Australia in 2023 – the highest ever for a calendar year.¹ This was reflected in vehicle registrations, with all Australian cities surveyed (Figure 3), experiencing an increase in registrations.²

¹ Federal Chamber of Automotive Industries, News, 4 January 2024, 'Australia breaks all-time new vehicle sales in 2023'

² Bureau of Infrastructure and Transport Research Economics (BITRE), Australian Infrastructure and Transport Statistics Yearbook (2023 year book, released June 2023)

FIGURE 1: TRANSPORT MODES USED DAILY

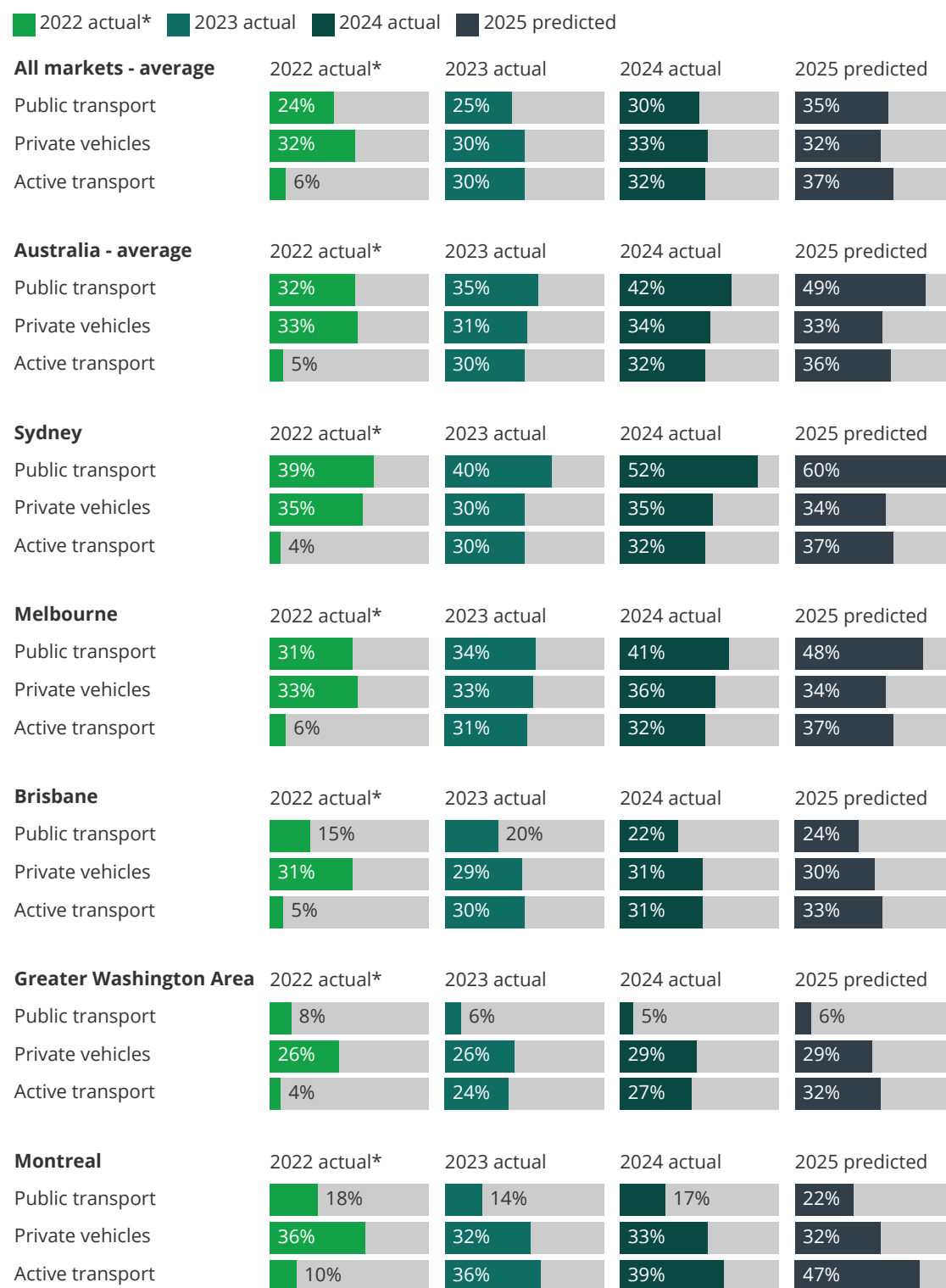


Q. How often do you currently use the following modes of transport?

Q. And how often do you expect to use the following modes of transport in the next 12 months?

* Previously active transport included just bicycles as a mode choice. From 2023 transport figures include bicycles, e-bikes, and walking.

FIGURE 2: TRANSPORT MODES USED A FEW TIMES A WEEK

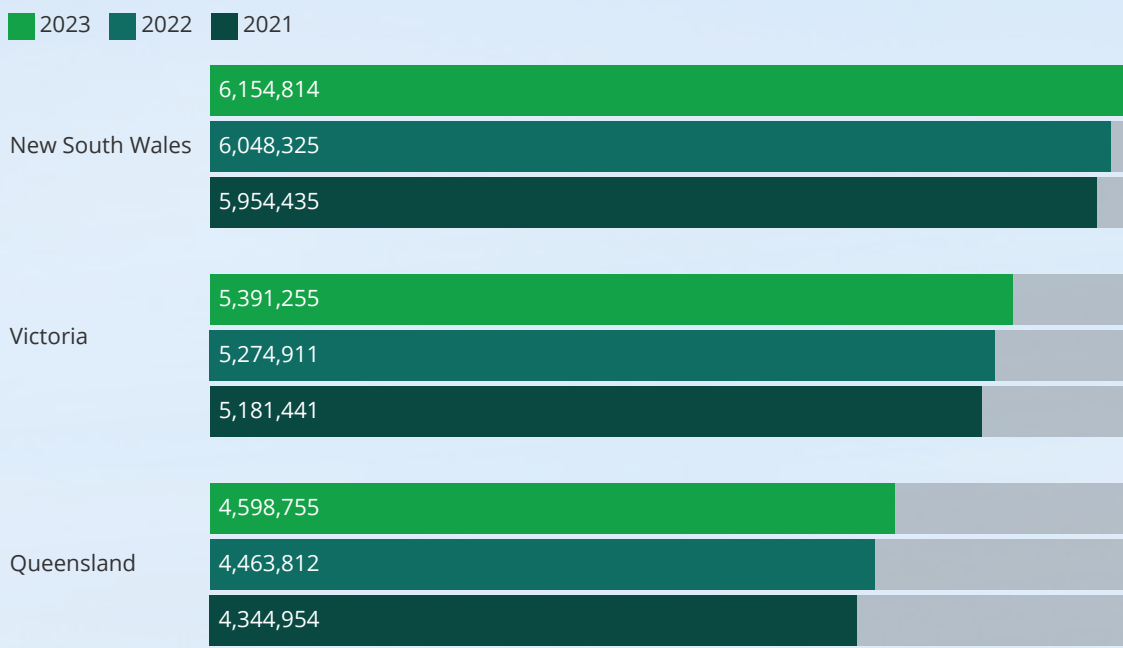


Q. How often do you currently use the following modes of transport?

Q. And how often do you expect to use the following modes of transport in the next 12 months?

* Previously active transport included just bicycles as a mode choice. From 2023 transport figures include bicycles, e-bikes, and walking.

FIGURE 3: TOTAL REGISTERED MOTOR VEHICLES, BY STATE/TERRITORY



Source: BITRE



M2 Motorway, Sydney

Section 2: Getting to work

3.9

3.9 average days people **travel to their workplace**



15% of respondents expect the number of **days they travel to their workplace to increase** over the next 12 months



61% of people in Australia **use private vehicles to get to work**



77% of respondents in North America **use private vehicles to commute**

This section looks at how often people travel to their workplace and their mode of transport.

Where people are working from

Most people travel to their workplace an average of almost four days a week – a figure that has stabilised over the past year (Figure 4).

In Australia, people are travelling to work an average of 3.9 days, while in the Greater Washington Area that figure increases to an average of 4.2 days. In Montreal, the average is slightly lower at 3.4 days.

The number of days that people are travelling for study is slightly down in Australia from three days last year to 2.8 on average this year. In Greater Washington Area and Montreal, the three days on average that people are travelling is consistent with last year.

While many people cannot work from home, even those in office-based occupations expect to travel to work on average between 3.6 to 3.9 days a week, depending on the occupation (Figure 5).

In the Australian cities surveyed, 68% expect their commuting routines to remain similar in the coming year with 22% expecting to travel more, while 7% expect to travel less (Figure 6). We found similar expectations among those surveyed in the Greater Washington Area and Montreal.

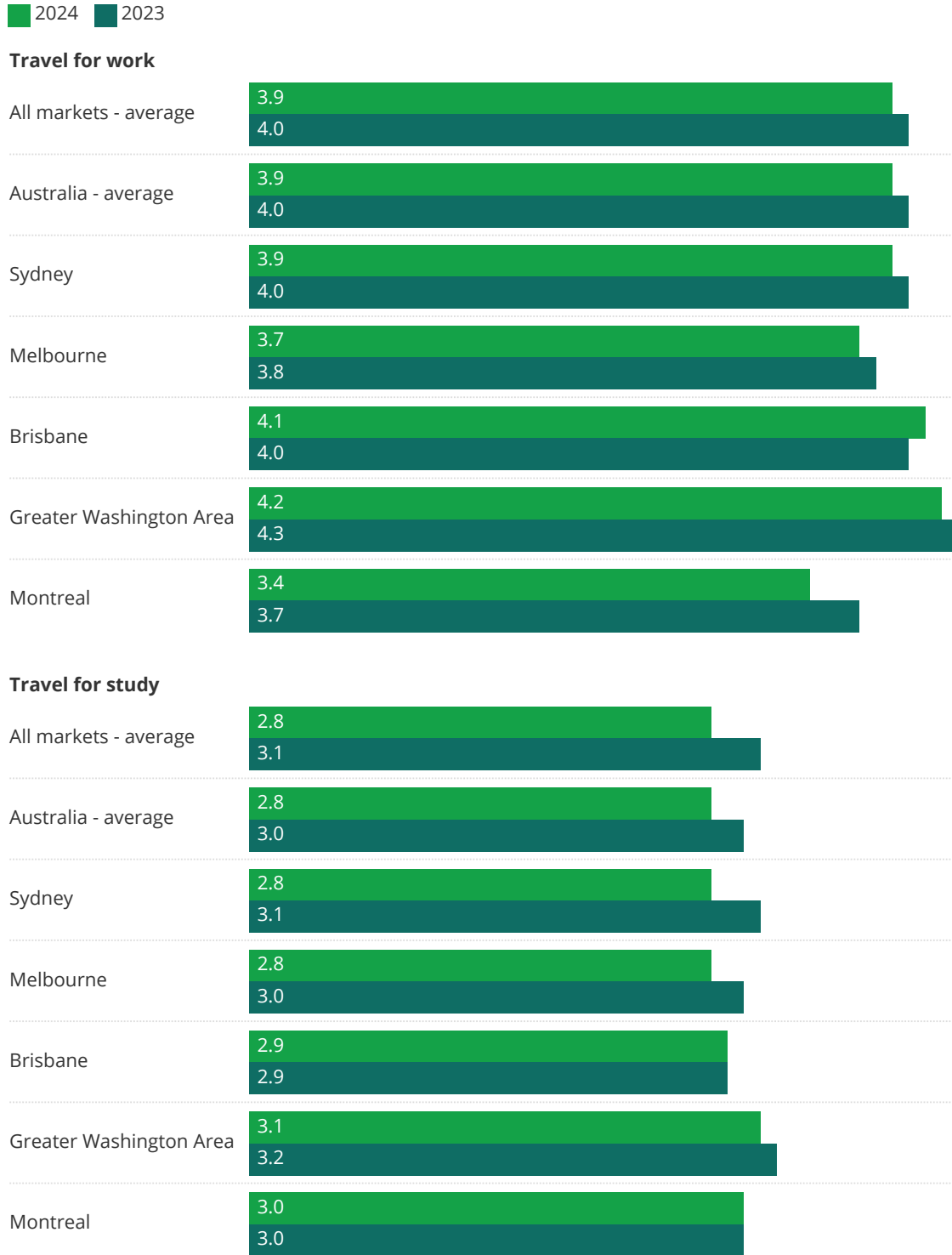
Being required to by their employer is the main reason people expect to increase the number of days they travel to workplaces, which is consistent with last year's findings (Figure 7).

Around 40% of Australian respondents cited increased productivity and collaboration with their colleagues as a reason to travel to the workplace more in the next 12 months.

In the Greater Washington Area, 33% of respondents said concern about job security was a factor in their attending the workplace, compared to 23% in Australia and Montreal.



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



Q. In a typical week, how many days do you travel to or for work and travel to or for study?

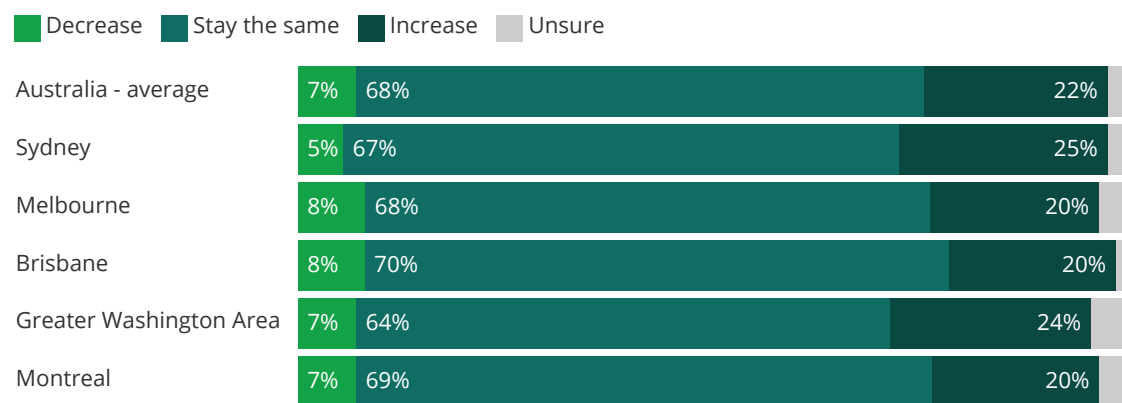
FIGURE 5: AVERAGE DAYS TRAVELLED TO/FOR WORK, BY OCCUPATION

	Australia	Greater Washington Area	Montreal
Machine operator / driver	4.2	4.3	4.2
Manager / administrator	3.9	4.3	4.0
Para professional (e.g. nurse, technician, police)	3.9	4.0	3.9
Trade person (e.g. plumber, electrician)	4.5	4.5	3.5
Sales representative / store salesperson /personal services	3.9	4.0	3.4
Professional (e.g. lawyer, doctor)	3.8	4.1	3.2
Other	3.7	3.9	3.1
Clerical or secretarial	3.6	4.1	3.0

Q. In a typical week, how many days do you travel to or for work?

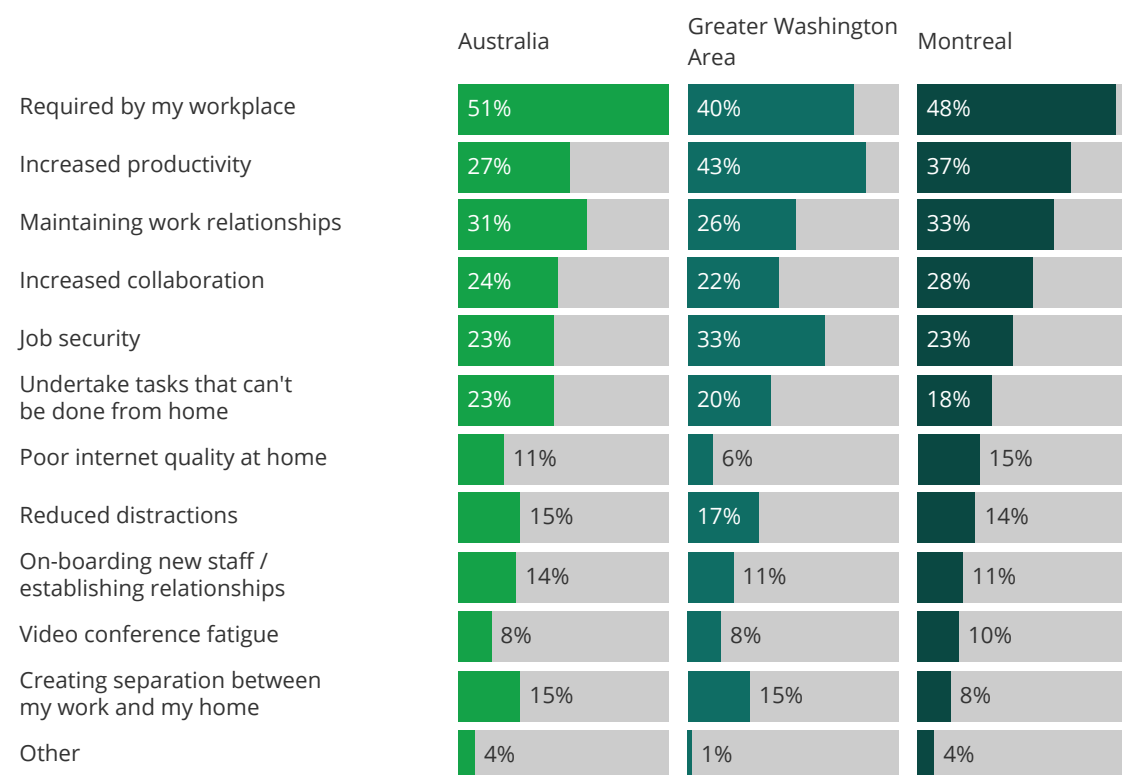


FIGURE 6: EXPECTED CHANGE IN THE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE (OR TRAVEL AROUND FOR THEIR JOB)



Q. In the next 12 months, do you expect the number of days you travel to your workplace or place of study to.

FIGURE 7: REASONS PEOPLE EXPECT TO INCREASE THE NUMBER OF DAYS THEY TRAVEL TO THEIR WORKPLACE



Q. Which, if any, of the following reasons would you consider increasing the number of days you travel to work?

How people get to work or study

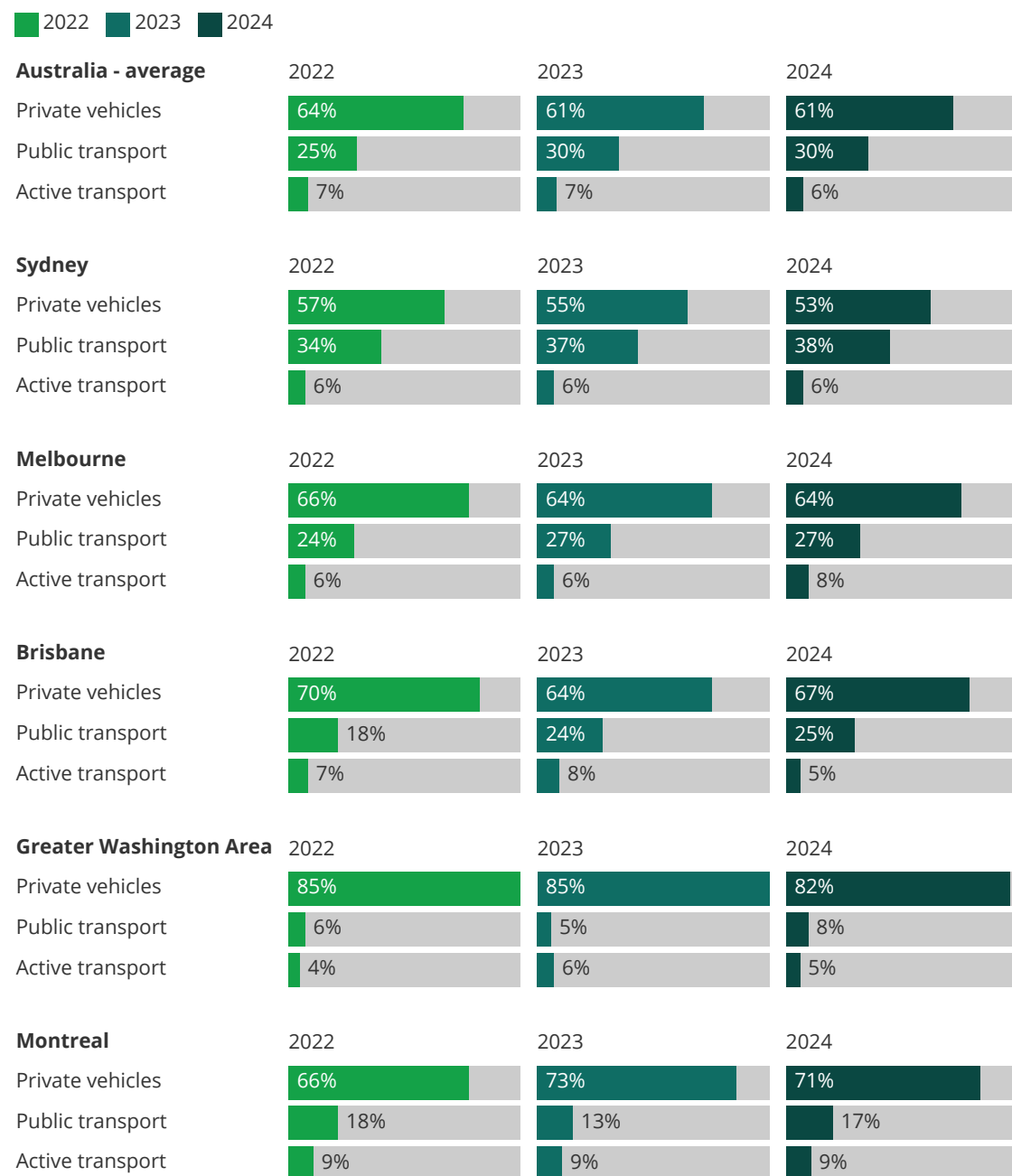
Private vehicles far outweigh other modes of transport as the main way people get to work or study. More than 60% of Australian respondents use their private vehicle to commute while 30% take public transport

(Figure 8). This result is consistent with last year's survey findings.

The highest users of private vehicles in Australia are in Brisbane (67%) and Melbourne (64%).

Commuters in the Greater Washington Area are the most reliant on private cars with 82% choosing that mode of transport. In Montreal, 71% use private vehicles to commute compared to 17% using public transport.

FIGURE 8: MAIN MODE OF TRANSPORT USED TO COMMUTE TO (OR TRAVEL AROUND FOR) WORK/STUDY



Q. What type of transport do you mainly use to travel to your workplace/place of study (or travel around for work/study) currently? Even if you use multiple modes of transport during your commute, please select the main mode you use.

Section 3: Cost of living and transport costs



Cost of living is the most important issue nominated as requiring focus



Groceries and fuel are the top cost-of-living concerns impacting household budgets



Most people do not regularly consider the **price of fuel** when making travel decisions



People use toll roads to take **the most direct route and save time**

This section looks at the top cost-of-living concerns impacting people's household budgets, and the different factors people consider when making transport choices.

Cost of living

Predictably, given the current macro-economic conditions, cost of living emerged as the top issue impacting people across all cities surveyed.

The concern about cost of living remained consistent in most cities in 2024, aside from the Greater Washington Area where there was an increase in concern by almost 10% from last year.

In Australia, 76% listed cost of living as the top issue requiring focus, followed by housing affordability and housing supply. In Greater Washington, jobs and economic growth came second to cost of living; and in Montreal, hospitals and healthcare were the second most important issue.

Looking at specific cost-of-living concerns, the top expenses impacting household budgets remained consistent across all cities in 2024, with groceries again ranking as the top cost-of-living concern, followed by fuel.

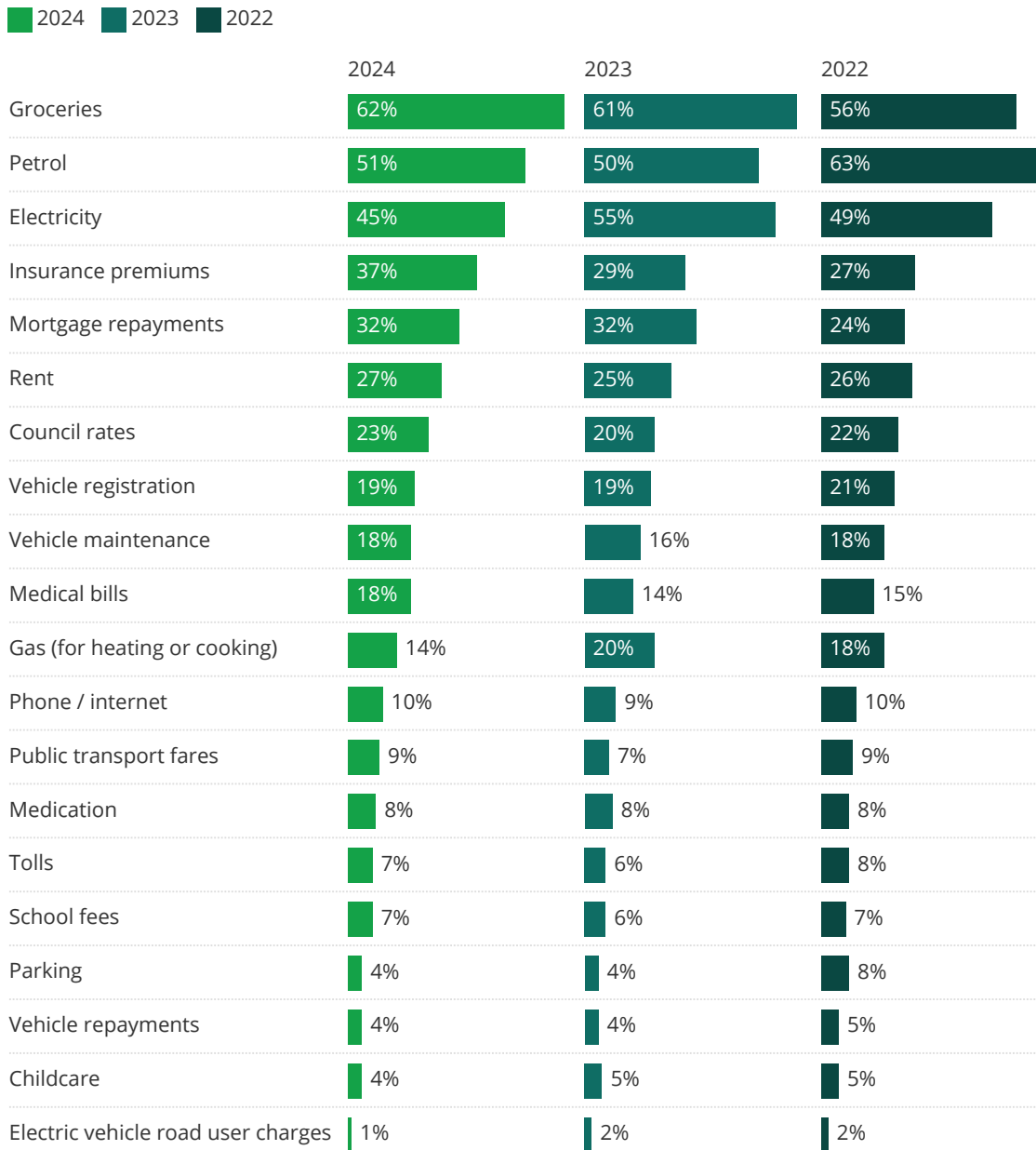
Concern about insurance premiums was the biggest increase on Australian (Figure 9) and Greater Washington (Figure 10) household budgets from last year – both coming in fourth on the list – while in Montreal the biggest increase was rent (Figure 11).

When it comes to saving money, the top three 'big decisions' people in Australia and Montreal are taking include: switching energy and

internet providers; delaying large purchases such as upgrading a car; and cancelling subscriptions or memberships (Figure 12 and Figure 14). In Greater Washington, most people are delaying large purchases, cancelling subscriptions or memberships and automating their savings by splitting money into savings and spending accounts. (Figure 13).

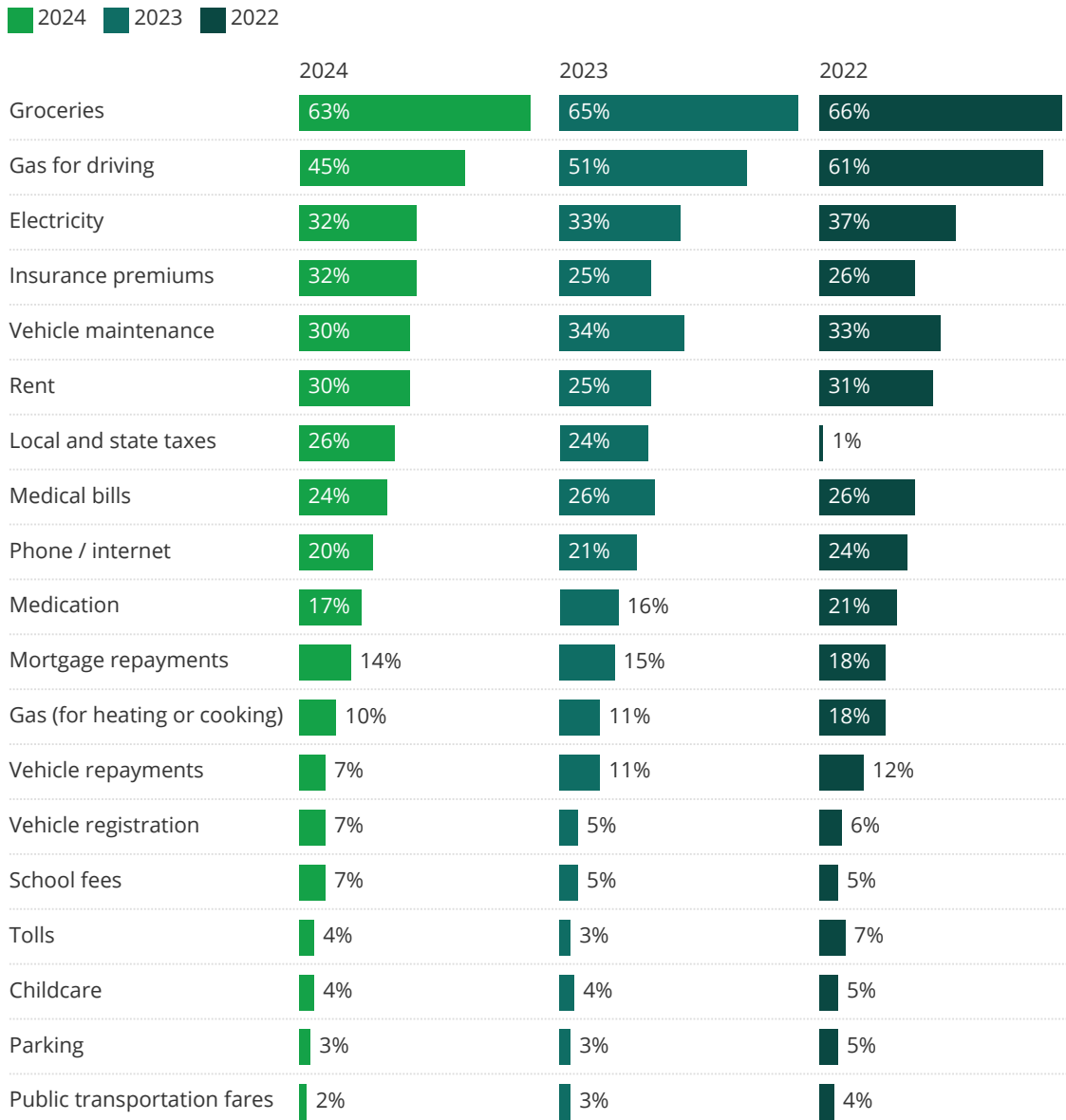


FIGURE 9: CONCERN ABOUT HOUSEHOLD EXPENSES – AUSTRALIA



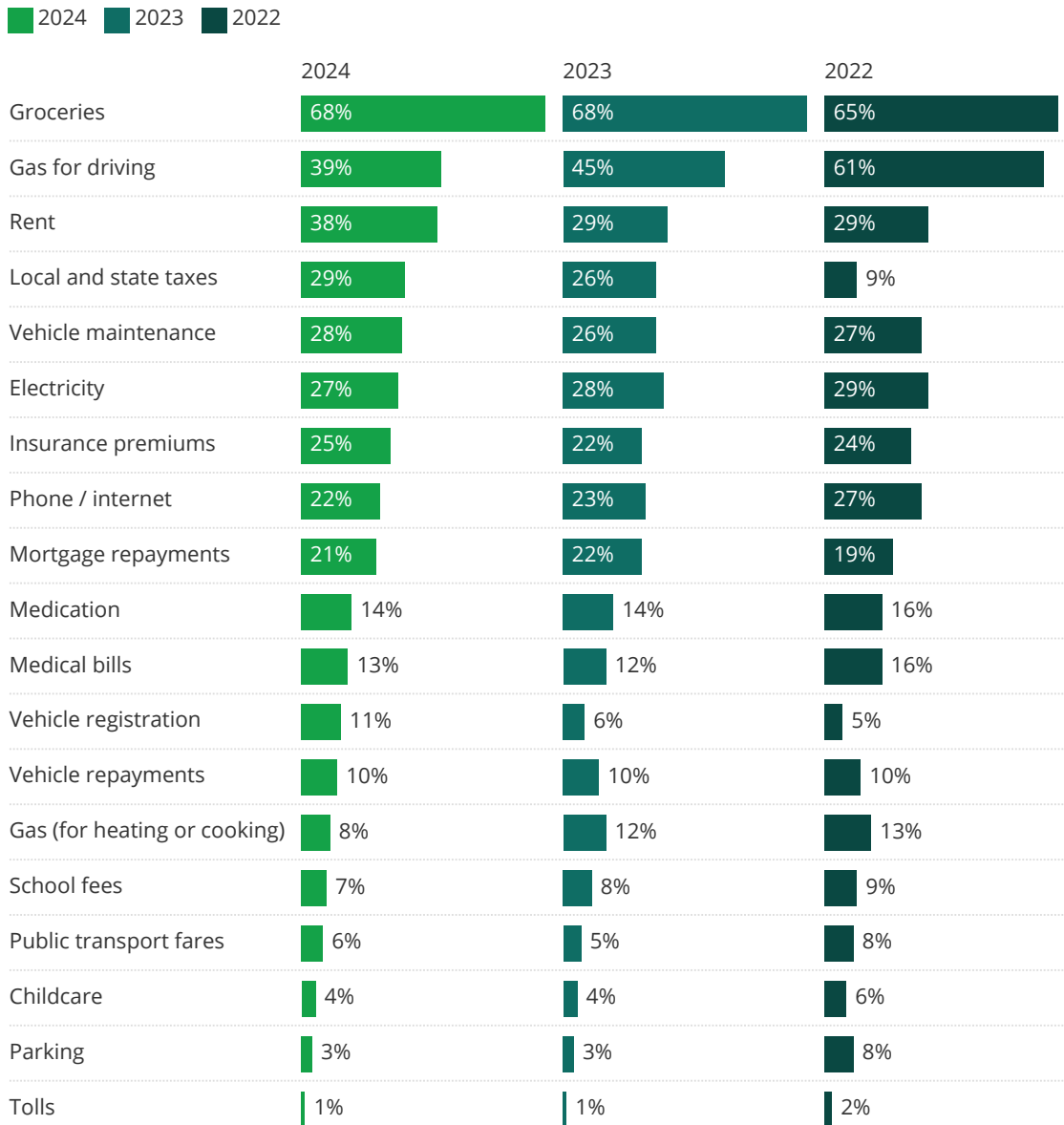
Q. Which expenses are you most concerned about? By concerned we mean the expenses you worry about with increases in cost and your ability to manage those increases in your budget. Please select up to five expenses.

FIGURE 10: CONCERN ABOUT HOUSEHOLD EXPENSES – GREATER WASHINGTON AREA



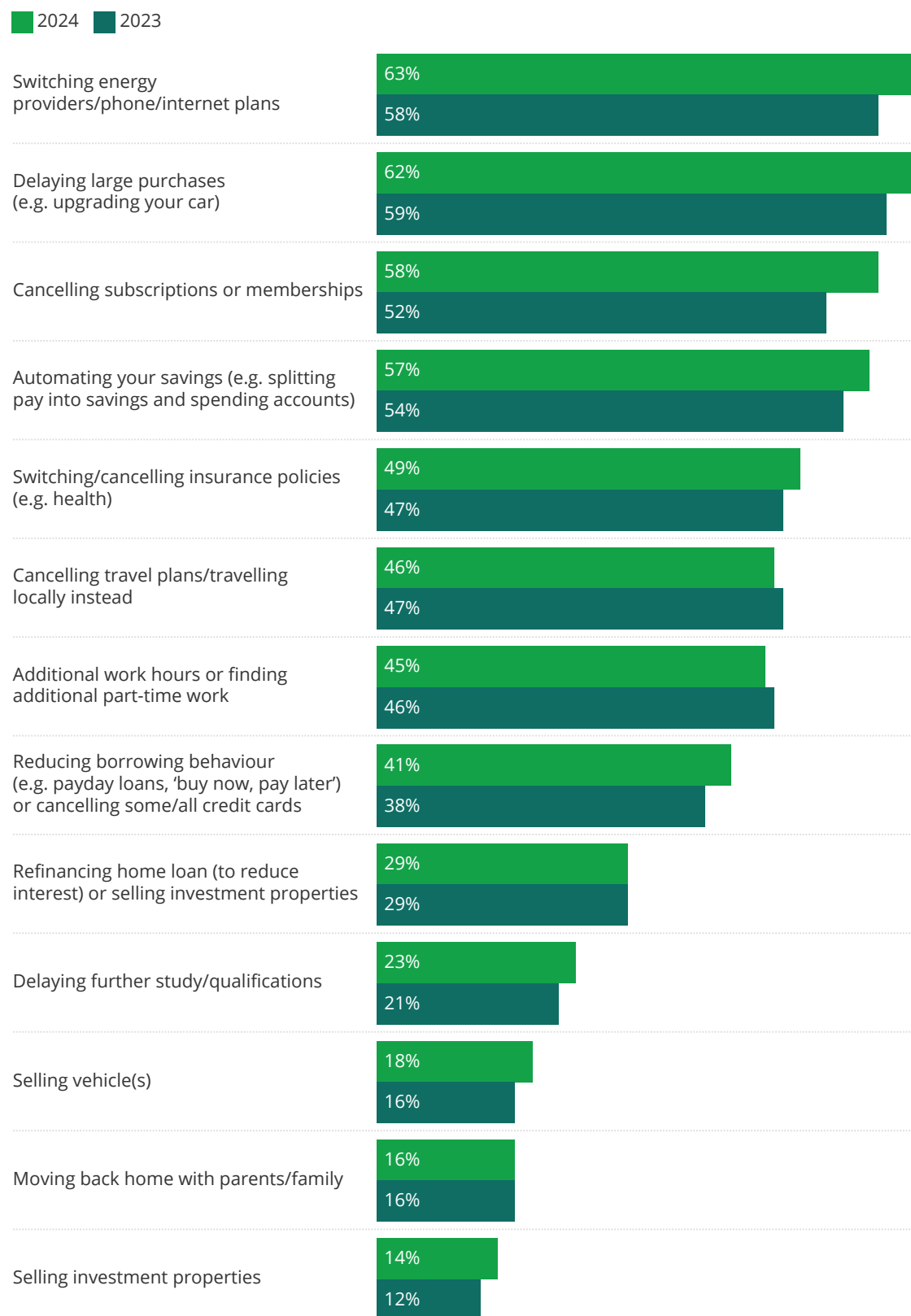
Q. Which expenses are you most concerned about? By concerned we mean the expenses you worry about with increases in cost and your ability to manage those increases in your budget. Please select up to five expenses.

FIGURE 11: CONCERN ABOUT HOUSEHOLD EXPENSES – MONTREAL

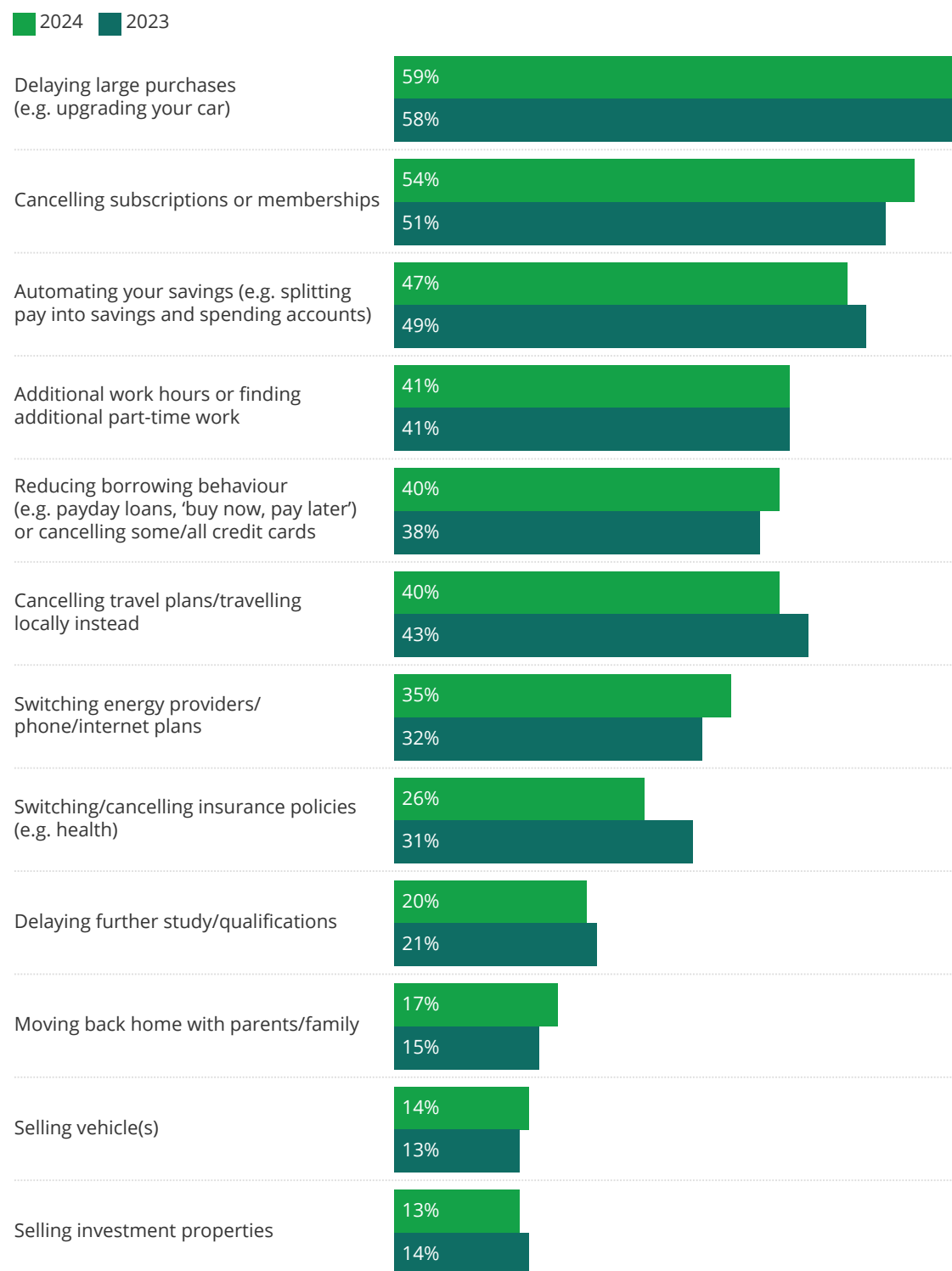


Q. Which expenses are you most concerned about? By concerned we mean the expenses you worry about with increases in cost and your ability to manage those increases in your budget. Please select up to five expenses.

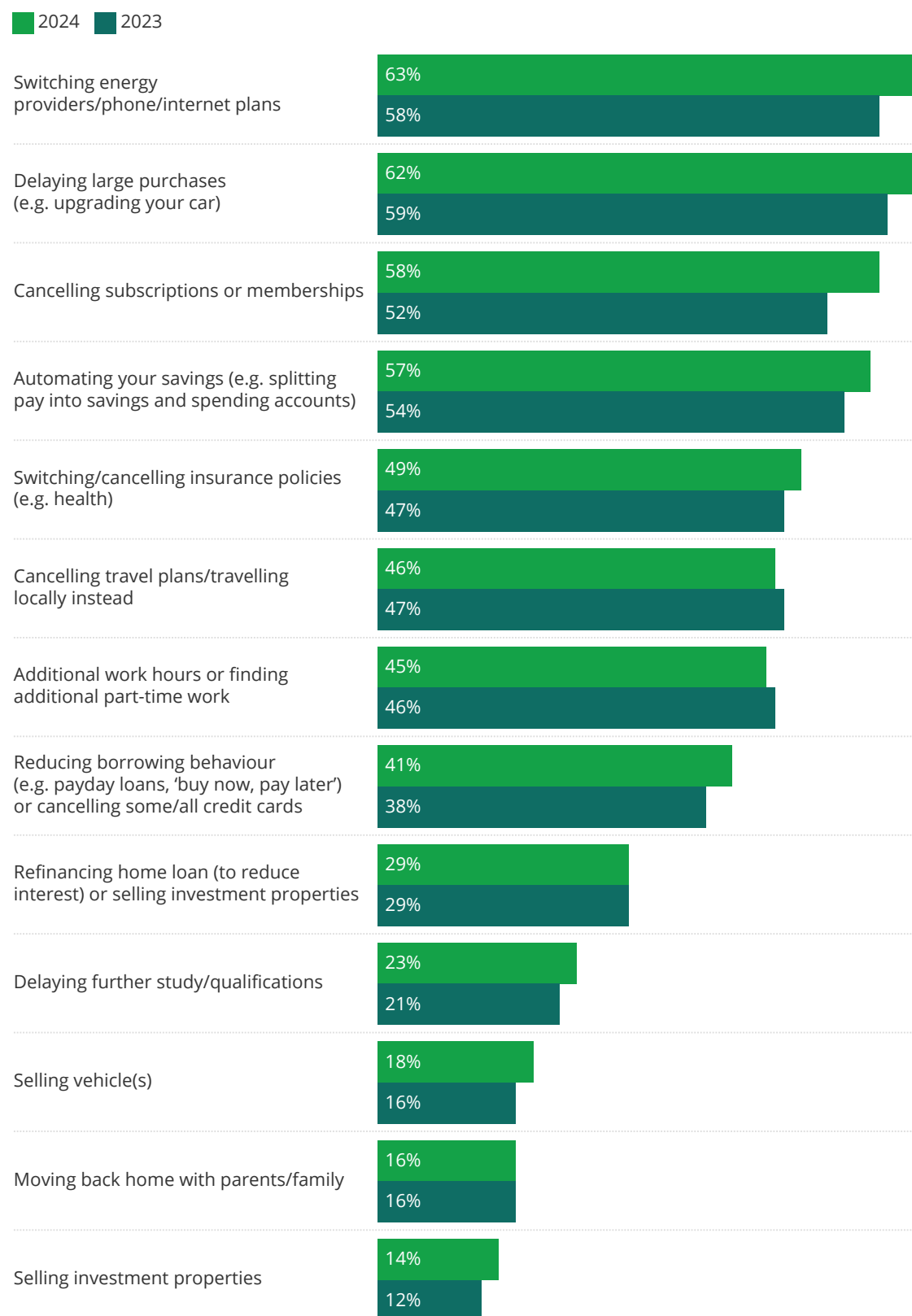
FIGURE 12: WAYS TO SAVE: BIGGER DECISIONS – AUSTRALIA



Q. Thinking about how you are managing your finances more generally, which (if any) of the following things are you currently doing to save money (if applicable to you)?

FIGURE 13: WAYS TO SAVE: BIGGER DECISIONS – GREATER WASHINGTON AREA

Q. Thinking about how you are managing your finances more generally, which (if any) of the following things are you currently doing to save money (if applicable to you)?

FIGURE 14: WAYS TO SAVE: BIGGER DECISIONS – MONTREAL

Q. Thinking about how you are managing your finances more generally, which (if any) of the following things are you currently doing to save money (if applicable to you)?

Transport costs

The price of fuel is still the top transport-related cost-of-living concern for 2024 across all cities surveyed, despite a slight drop in North America.

Concern about the price of fuel dropped 6% in Greater Washington and Montreal compared to 2023, but it remains the second biggest concern on overall household budgets.

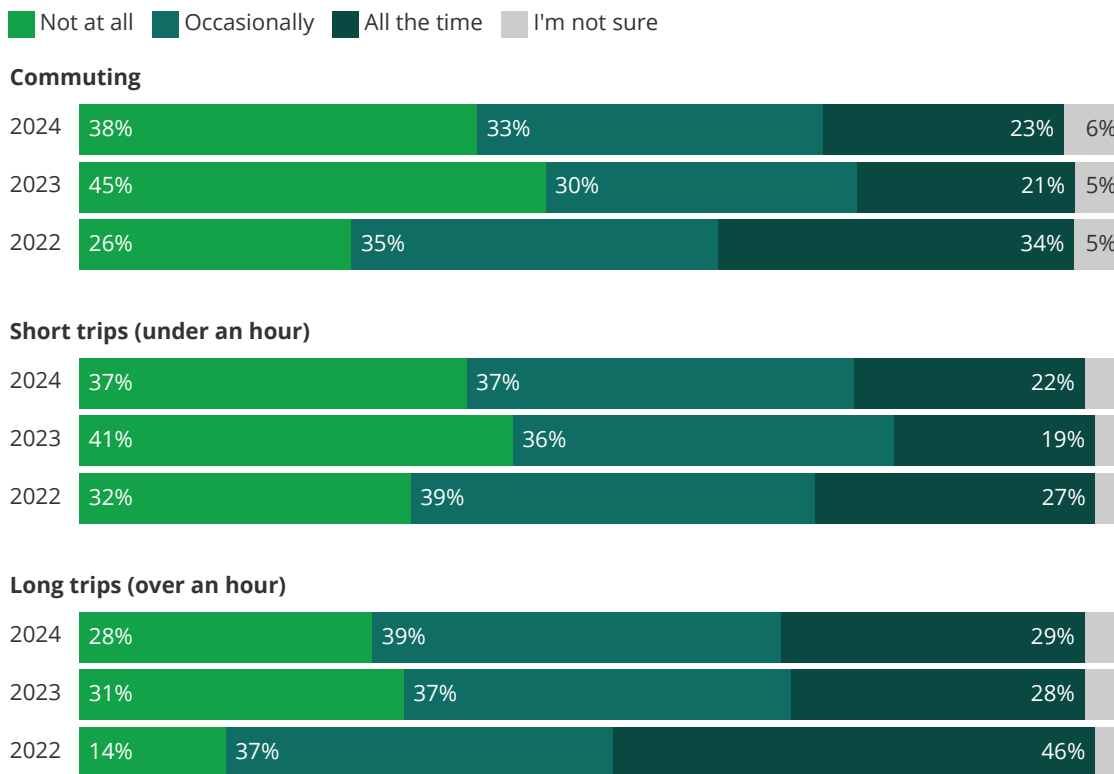
While in Australia, there was a small increase of 1%, with 51% of Australians also ranking fuel as the second highest expense causing stress on the household budget (Figure 9).

Of the Australian cities surveyed, the biggest concern about fuel prices was in Brisbane where 56% of people ranked it as a top cost of living concern. This comes after Brisbane recorded the highest average retail petrol prices of Australia's largest cities in the March 2024 quarter.³

Despite fuel being a top cost of living concern across all cities, most people surveyed do not consider, or only occasionally consider, the price of fuel when making travel choices (Figures 15-18).

In Australia, 71% of commuters do not, or only occasionally, consider the price of fuel when making decisions about their daily trips. In North America, almost half of daily commuters do not consider the price of fuel when making travel decisions.

FIGURE 15: INFLUENCE OF FUEL PRICE ON TRAVEL CHOICES – AUSTRALIA

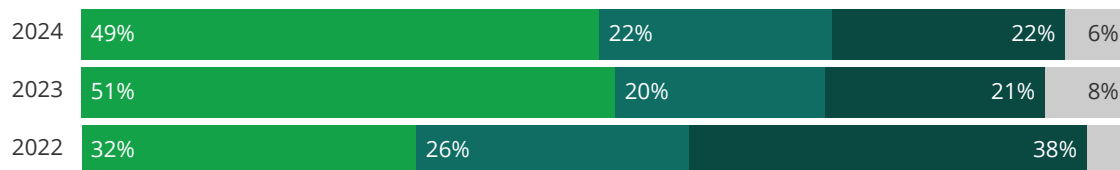
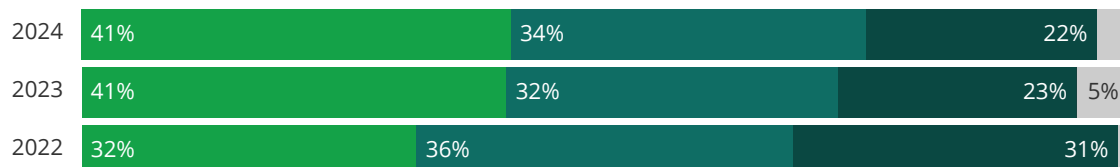


Q. To what extent, if at all, do you think the price of petrol/gas influenced your transport and travel choices over the last six months?

³ Australian Competition & Consumer Commission (ACCC) Quarterly report on the Australian petroleum market – March quarter 2024

FIGURE 16: INFLUENCE OF FUEL PRICE ON TRAVEL CHOICES – GREATER WASHINGTON AREA

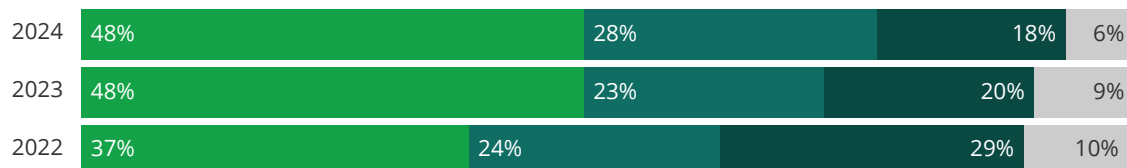
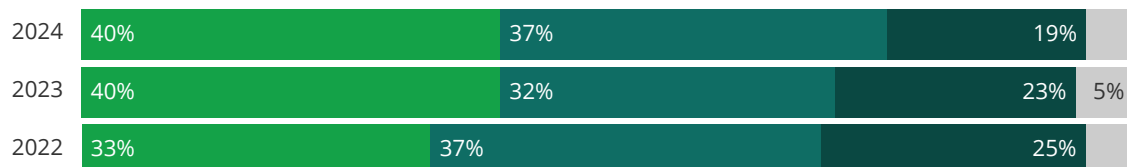
Not at all Occasionally All the time I'm not sure

Commuting**Short trips (under an hour)****Long trips (over an hour)**

Q. To what extent, if at all, do you think the price of petrol/gas influenced your transport and travel choices over the last six months?

FIGURE 17: INFLUENCE OF FUEL PRICE ON TRAVEL CHOICES – MONTREAL

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

Commuting**Short trips (under an hour)****Long trips (over an hour)**

Q. To what extent, if at all, do you think the price of petrol/gas influenced your transport and travel choices over the last six months?

Why and when people choose toll roads

Most people are relatively infrequent users of toll roads. In both Australia and North America, most people use toll roads less than once a week. Daily commuters make up the smallest percentage of toll road users across all cities surveyed (Figure 18).

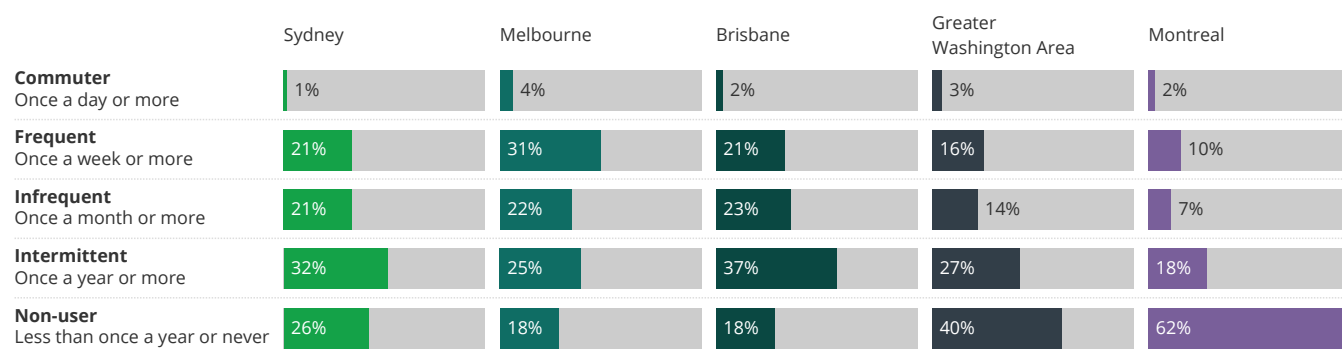
When deciding to use a toll road, people are doing so because it provides them with the most direct route, saves time and helps them avoid traffic. The ability to save on fuel costs – a top cost of living concern – is also a key consideration due to quicker trip times on toll roads (Figure 19).



Most people use toll roads less than once a week

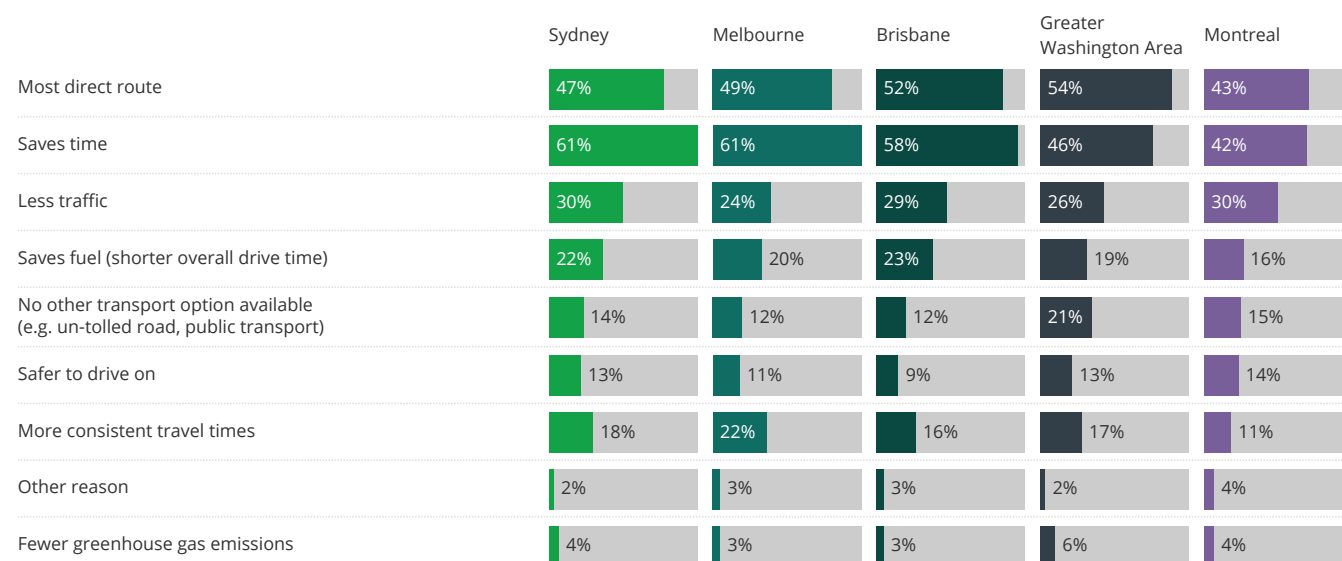
People use toll roads to take the most direct route, save time, and avoid traffic

FIGURE 18: FREQUENCY OF TOLL ROAD USE



Q. How often do you travel on any road, bridge, or tunnel you must pay to use, otherwise known as a toll road?

FIGURE 19: REASONS FOR USING TOLL ROADS



Q. Why do you use toll roads? Please select all that apply.

Section 4: Congestion and transport infrastructure development



70% of Australians **concerned about traffic congestion**; 80% concerned about potential levels of congestion in a decade



54% of North American respondents are **concerned about the current levels of congestion**



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

This section looks at understanding people’s views about traffic congestion and attitudes towards transport infrastructure development.

Congestion levels

In Australia, 70% of survey respondents are concerned about current levels of congestion, while 80% fear it will be worse in a decade (Figure 20).

In Melbourne and Brisbane concern is the highest where almost half of respondents say they are “completely concerned” about congestion in 10 years’ time and the ability for transport infrastructure to keep pace with population growth.

In North America, 54% are concerned about congestion now, and even more – 63% – are concerned about the levels of gridlock they may face in a decade.

Washington, D.C. is ranked the second most congested city in the country. In 2023, commuters spent an extra 86 hours in the car during rush hour due to congestion.

Population growth is likely to put further pressure on transport infrastructure with the biggest increases concentrated in urban areas including Melbourne and South East Queensland.

Over the next two decades, Australia is expected to grow by more than 7 million people.⁴ Furthermore, in Australia, road freight is forecast to increase by almost 80% by from 2020 to 2050.⁵

	Population growth ⁶	2023 congestion level ⁷
Brisbane	~40%	25%
Melbourne	~35%	26%
Sydney	~25%	30%
Greater Washington Area	~16%	25%
Montreal	~14%	27%

4 Australian Bureau of Statistics. Population Projections, Australia, November 2023

5 Navigating Australia’s Freight Future, National Freight Data Hub

6 Deloitte Access Economics (DAE) Sep22 Land Use Forecasts; PSG (Pritchett Steinbeck Group, Inc.), January 2023 release.

7 Percentage represents average additional time (in percentage) lost to traffic in 2023, compared to driving in free-flowing conditions. Source: TomTom data.

FIGURE 20: CONCERN ABOUT CONGESTION NOW AND IN 10 YEARS' TIME

■ Not at all concerned
 ■ Somewhat unconcerned
 ■ Neither concerned nor unconcerned
■ Somewhat concerned
 ■ Completely concerned

Australia - average



Sydney



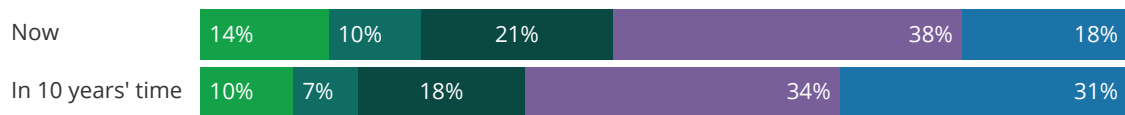
Melbourne



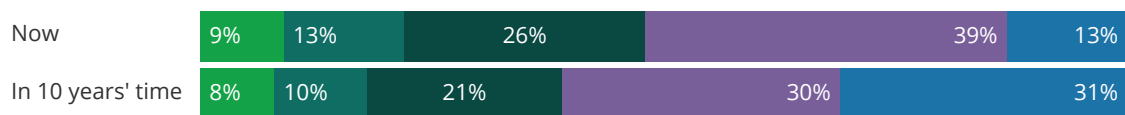
Brisbane



Greater Washington Area



Montreal



Q. How concerned are you about the issue of increased traffic congestion in your state/territory/province – both now and in ten years' time when the population is expected to have increased?



Avoiding peak hour

In North America, 61% of respondents are more likely to be able to adjust their working hours to avoid peak travel times compared to 52% of Australian respondents (Figure 21).

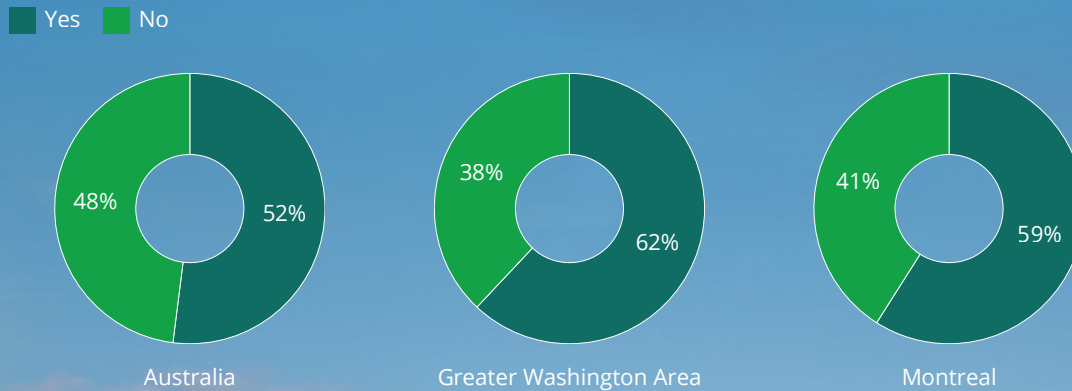
For those who are able to change their work start and finish times, most did so regularly – Greater Washington Area (59%); Montreal (57%) and Australia (53%) (Figure 22).

Those in Australia who have the ability to adjust their work hours are mostly doing so to beat the peak, with 84% either regularly or occasionally travelling outside rush hour.

However, 33% of people in Australia said that while their workplaces allowed flexible start/finish times, it was not encouraged (Figure 23), while in North America only 24% felt the same way.

In Australia, around 30% of respondents also said they had no choice but to travel in peak hour due to obligations such as school drop off.

FIGURE 21: ABILITY TO ADJUST WORK START AND END TIMES TO AVOID PEAK/RUSH HOUR TRAVEL

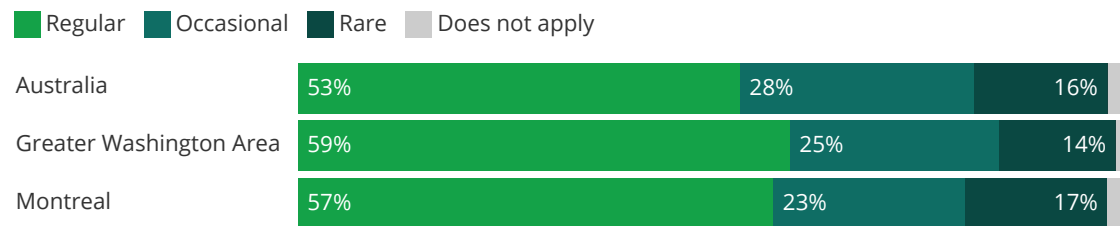


Q. If your job or shift requires you to commute during peak/rush hour travel times, are you able to adjust your work start and end times?



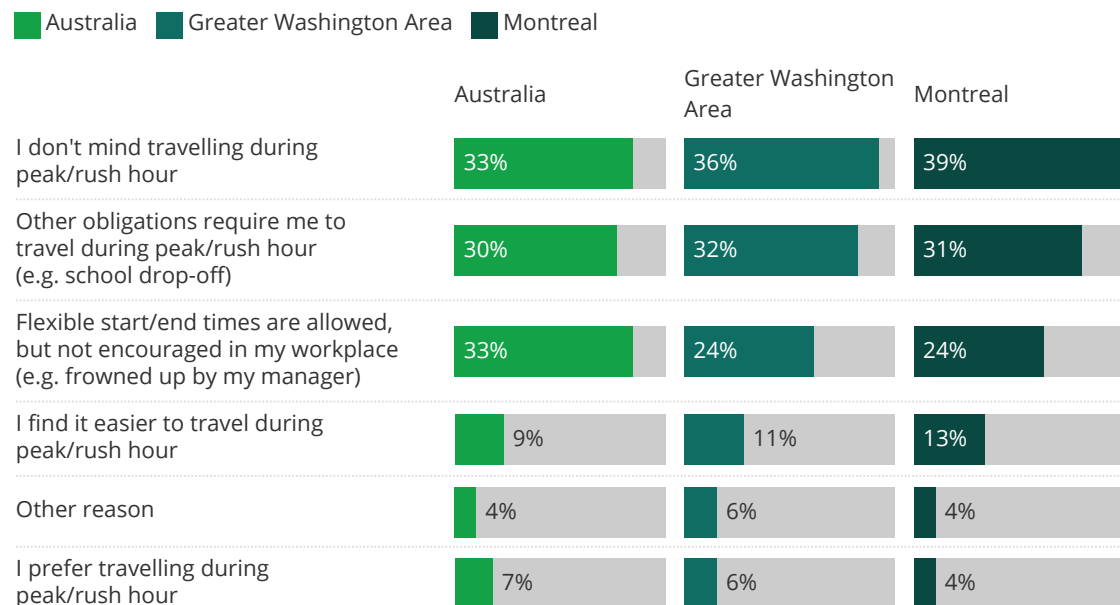
WestConnex, Sydney

FIGURE 22: FREQUENCY OF RUSH HOUR AVOIDANCE



Q. How often do you avoid travelling during peak/rush hour?
 Asked only of those whose workplace allows them to adjust their work start and end times.
 Excludes respondents for whom this does not apply (e.g. those who travel in the opposite direction).

FIGURE 23: REASONS FOR NOT AVOIDING PEAK/RUSH HOUR TRAVEL



Q. Which of the following are reasons why you don't/can't avoid travelling during peak/rush hour more often? Please select all that apply.

How to fund transport infrastructure

Transport infrastructure is one of many public priorities competing for funding at a time when governments face high levels of debt.

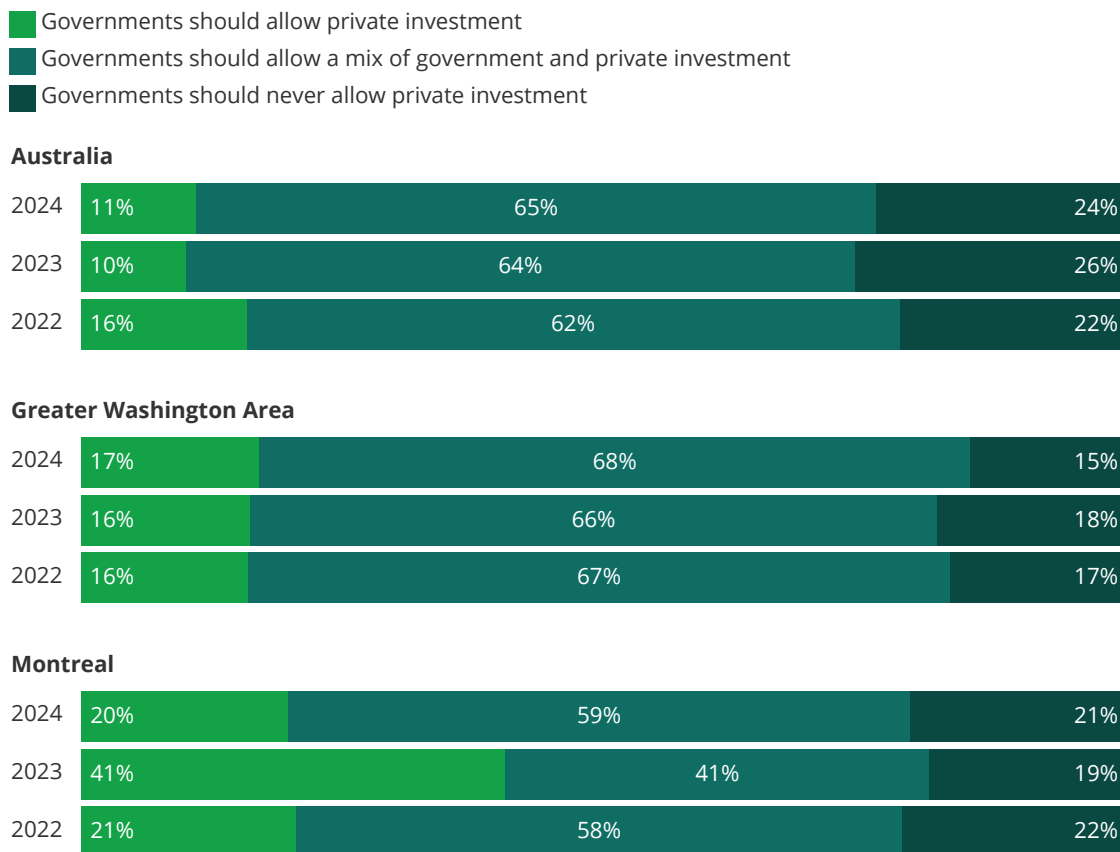
In Australia, 65% of respondents think that governments should meet their infrastructure needs through a mixture of public and private funding. While in the United States, 68% of respondents favour this funding mechanism (Figure 24).

The private sector in Australia has helped plug funding gaps has to deliver critical transport infrastructure through public-private partnership arrangements.

Most respondents – 74% – think a mix of smarter infrastructure to improve traffic flow and more public transport are the keys to relieving congestion, followed by more and improved roads in congested areas (Figure 25).

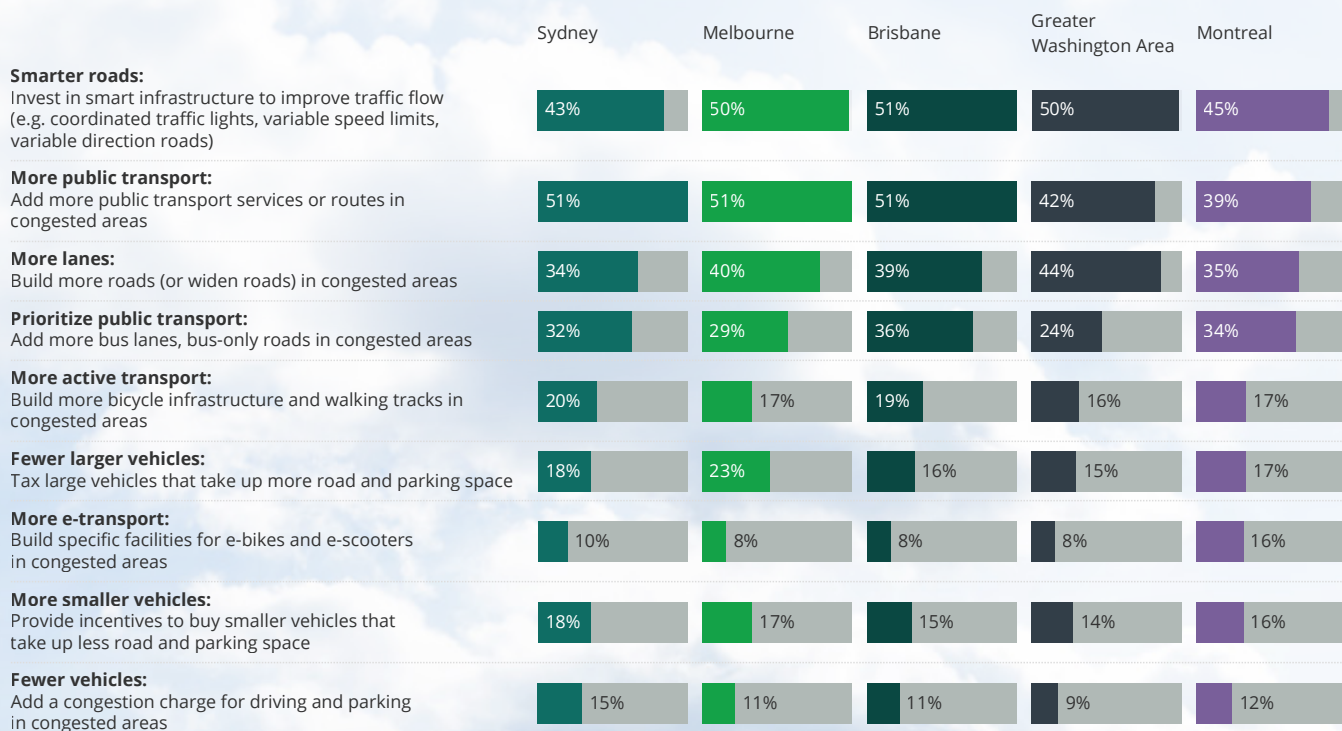
Smart infrastructure includes coordinated traffic lights and variable speed limits as well as technologies on managed motorways such as toll roads including electronic lane use and variable messaging signs, CCTV and automated incident detection.

FIGURE 24: ROLE OF PRIVATE SECTOR IN FUNDING AND DELIVERY OF ROAD INFRASTRUCTURE



Q. To what extent do you think government should seek private investment to help fund the delivery of new roads and major upgrades to existing roads? Private investors receive a financial return from either the government or users of the roads.

FIGURE 25: MEASURES GOVERNMENTS SHOULD TAKE TO REDUCE OR AVOID FUTURE CONGESTION



Q. Which measures should the government take to reduce or avoid future congestion? Select up to three options.



CityLink, Melbourne

Australia

Melbourne (head office)

Level 31, Tower 5, Collins Square
727 Collins Street
Docklands Victoria 3008

Phone +61 3 8656 8900

Fax +61 3 8656 8585

North America

Greater Washington Area

Suite T500, 7900 Westpark Drive
Tysons, VA 22102

Phone +1 571-419-6100

Email corporate@transurban.com

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