Transurban

INDUSTRY REPORT

Urban Mobility Trends

August 2023 edition

Every year we survey thousands of people in cities across Australia and North America about a broad range of factors that influence people's 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 mobility trends over time.

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

Research

Online survey conducted between 22 June and 17 July 2023

5,047 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)[1]

Survey commissioned by Transurban and conducted by Nature

50%+

of respondents **drive every day**

4.0*

average days people **travel to their workplace each week**, with increases expected over the next 12 months in every city surveyed

64%

of respondents from the Australian cities surveyed are **concerned about rising levels of congestion** (56% in the North American cities surveyed)

**Weighted average across all cities surveyed*

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

Executive Summary

Heading to the workplace four days a week and driving every day are among the trends emerging from our latest Urban Mobility Trends report.

Overall, more people are driving every day in 2023 with year-on-year increases observed since we incorporated the question in our January 2021 survey.

When it comes to commuting, people in the Australian cities surveyed and the Greater Washington Area are travelling to their workplace (or place of study) more regularly than this time last year.

While most people expect the number of days they travel to their workplace to stay the same over the next 12 months, a greater proportion expect this to increase rather than decrease. Overall we found between 15% and 23% of respondents expect the number of days they travel to their workplace to increase over the next 12 months, depending on the city. The most common reasons were being required to return by their employer, maintaining relationships, increased collaboration and for job security.

Given that most people (61% in the Australian cities surveyed and 79% in the North American cities surveyed) commute to work or study via private vehicle, increasing travel to workplaces has the potential to increase levels of congestion across the road network. While far fewer (30% in the Australian cities surveyed and 9% in the North American cities surveyed) use public transport to commute, more people are using it to get to work or study when compared to our July 2022 survey, which could help to offset some of the impact.

As it stands, peak-hour congestion across all surveyed cities except Brisbane is still below pre-pandemic levels, but has been on the rise since pandemic-related restrictions eased and is likely to increase due to population growth over the next decade.

In Australia, it's expected that almost 2.8 million people will migrate to Australia between now and 2034,[2] with most settling in major cities, such as Melbourne, Sydney and Brisbane.[3]

It's perhaps unsurprising then that most people are concerned by current levels of congestion, and even more are concerned when they consider the potential levels of congestion they might face in 10 years' time. The highest level of concern was reported in Brisbane, where Transurban's transport modelling team predicts congestion will rise by 23% over the next decade.

Our survey found that avoiding congestion and saving time are among the main reasons people choose to use toll roads over alternative routes.

Addressing congestion through 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 this context, the private sector could be used to help plug funding gaps and deliver critical transport infrastructure through public-private partnership arrangements. We found 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.

2 *Centre for Population 2023, National population projections in the 2023-24 Budget, 2022-23 to 2033-34*

3 *Centre for Population 2022, Population Statement: Capital City and Rest-of-State Population Projections, 2021-22 to 2032-33*

Section 1: Travel behaviour

50%+ use private vehicles every day

More people are driving every day compared to our July 2022 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

In 2023 at least half of all respondents used private vehicles to get around every day, with those from the Greater Washington Area and Brisbane recording the highest levels of daily driving across all surveyed cities (Figure 1).

When compared to results from our July 2022 survey, we can see slight increases in daily driving across all surveyed cities, with the biggest increases observed in Sydney and Montreal.

Figure 1 compares data collected from last year's survey (July 2022) with our latest survey conducted in July 2023. From this we can see that more people are driving every day than expected to a year ago (except in Brisbane where people's predictions were consistent with actual use in 2023).

The opposite is true for public transport use, with fewer people using public transport every day in 2023 than expected to a year ago. Despite falling short of what was predicted, more people are using public transport every day in the Australian cities surveyed and the Greater Washington Area compared to 2022.

While people's expectations vary by city, it's generally expected that daily use of private vehicles and public transport in Australia will remain the same in 2024 or increase slightly.

Key findings

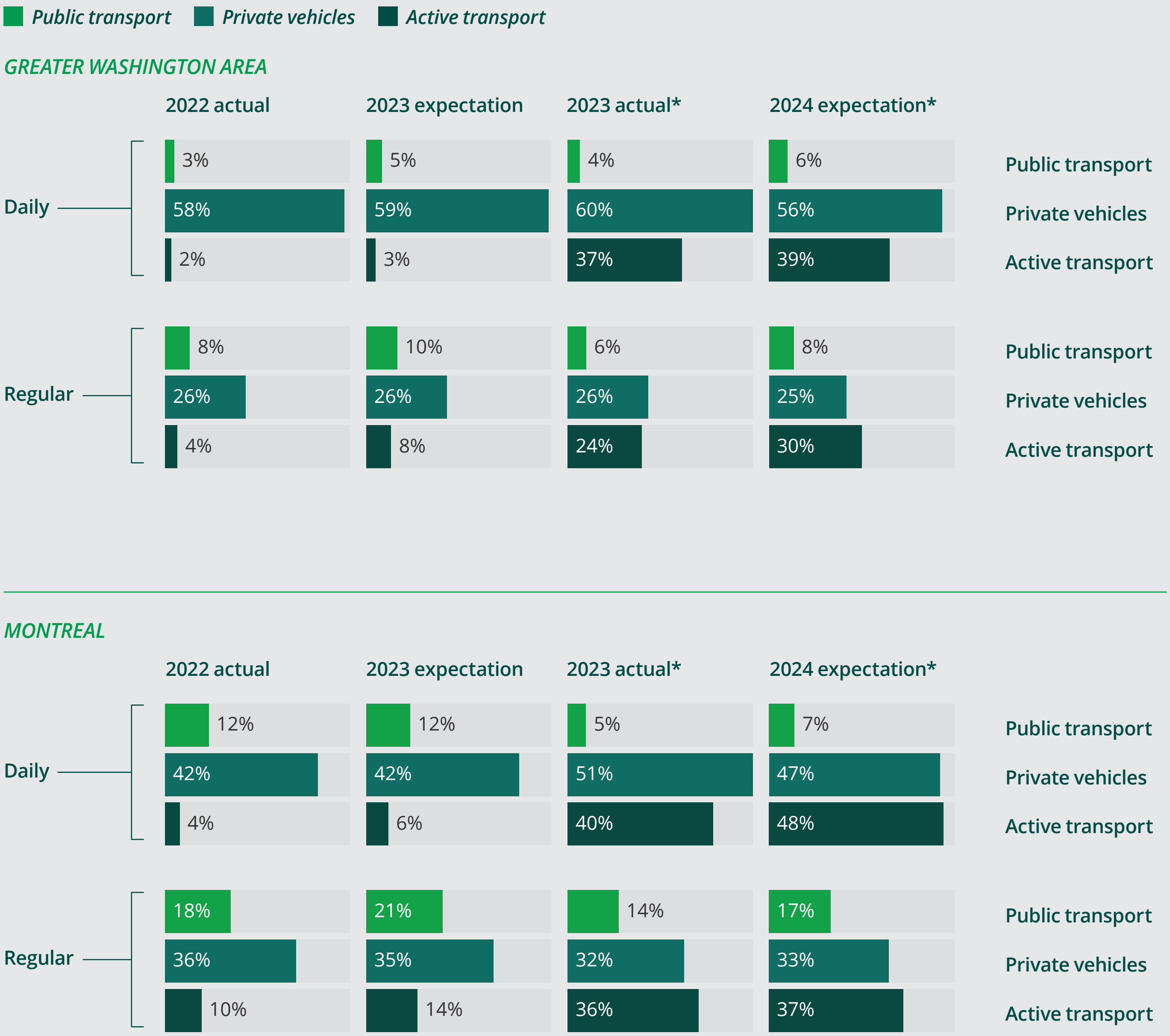
Over 50% of people surveyed use private vehicles every day

More people are driving every day compared to our July 2022 survey

FIGURE 1: TRANSPORT MODE NOW VS EXPECTED USE IN 12 MONTHS (COMPARING SURVEY RESULTS FROM JULY 2022 AND JULY 2023)

** Previously active transport included just bicycles as a mode choice. 2023 actual and 2024 expectation active transport figures include bicycles, e-bikes, and walking.*

FIGURE 1: TRANSPORT MODE NOW VS EXPECTED USE IN 12 MONTHS (COMPARING SURVEY RESULTS FROM JULY 2022 AND JULY 2023) (CONTINUED)



** Previously active transport included just bicycles as a mode choice. 2023 actual and 2024 expectation active transport figures include bicycles, e-bikes, and walking.*

While people's expectations vary by city, it's generally expected that daily use of private vehicles and public transport in Australia will remain the same in 2024 or increase slightly

Section 2: Getting to work

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

19% of respondents expect the number of **days they travel to their workplace to increase** over the next 12 months*

Workplace requirements, maintaining relationships, collaboration and job security are some of the reasons people expect to increase the number of days they travel to their workplace

This section looks at how often people travel to their workplace and the means by which they get there.

Where people are working from

Most people travel to their workplace for most of their working week. In the Australian cities surveyed and in the Greater Washington Area the average number of days people travel to their workplace or place of study is slightly higher than findings from our July 2022 survey, at 3.8 and 4.0 respectively (Figure 2). In Montreal the average number of days people travel to their workplace or place of study is the same as findings from our 2022 survey, at 3.6.

If we look at the average number of days people travel to their workplace (removing those travelling for study) the number is slightly higher, sitting at between 3.7 and 4.3 depending on the city (Figure 3).

While not everyone can choose to work from home, even those who are employed in white collar, office-based occupations expect to travel to work on average between 3.4 to 4 days a week, depending on the occupation and the city (Figure 4).

The number of days people expect to travel to their workplace in the next 12 months is likely to stay the same, however a greater proportion expect this to increase rather than decrease. Overall we found between 15% and 23% of respondents expect the number of days they travel to their workplace will increase over the next 12 months, depending on the city (Figure 5). In the Australian cities surveyed, those who work in middle suburbs (defined as a short drive from the city centre) reported the biggest expected net increase, while in the Greater Washington Area and Montreal the biggest expected net increase was for those who work in inner suburbs (defined as in and around the city centre) (Figure 6).

The reasons people expect to increase the number of days they travel to their workplace are varied, but the most commonly cited were being required to return by their employer, maintaining relationships, increased collaboration and for job security (Figure 7).

Key findings

People are travelling to their workplace or place of study more regularly in 2023 than 2022

Most people expect the number of days they travel to their workplace to stay the same in the next 12 months, however net increases are expected across each city surveyed

The main reason people expect to increase the number of days they travel to their workplace is due to workplace requirements

** Weighted average across all cities surveyed*

URBAN MOBILITY TRENDS
TRAVEL BEHAVIOUR
GETTING TO WORK
WHAT'S INFLUENCING TRAVEL
TRANSPORT INFRASTRUCTURE

FIGURE 2: AVERAGE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE OR PLACE OF STUDY (OR TRAVEL AROUND FOR THEIR JOB/STUDY) (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023)

FIGURE 3: AVERAGE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE (OR TRAVEL AROUND FOR THEIR JOB) EXCLUDING TRAVEL FOR STUDY

FIGURE 4: AVERAGE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE (OR TRAVEL AROUND FOR THEIR JOB), BY OCCUPATION

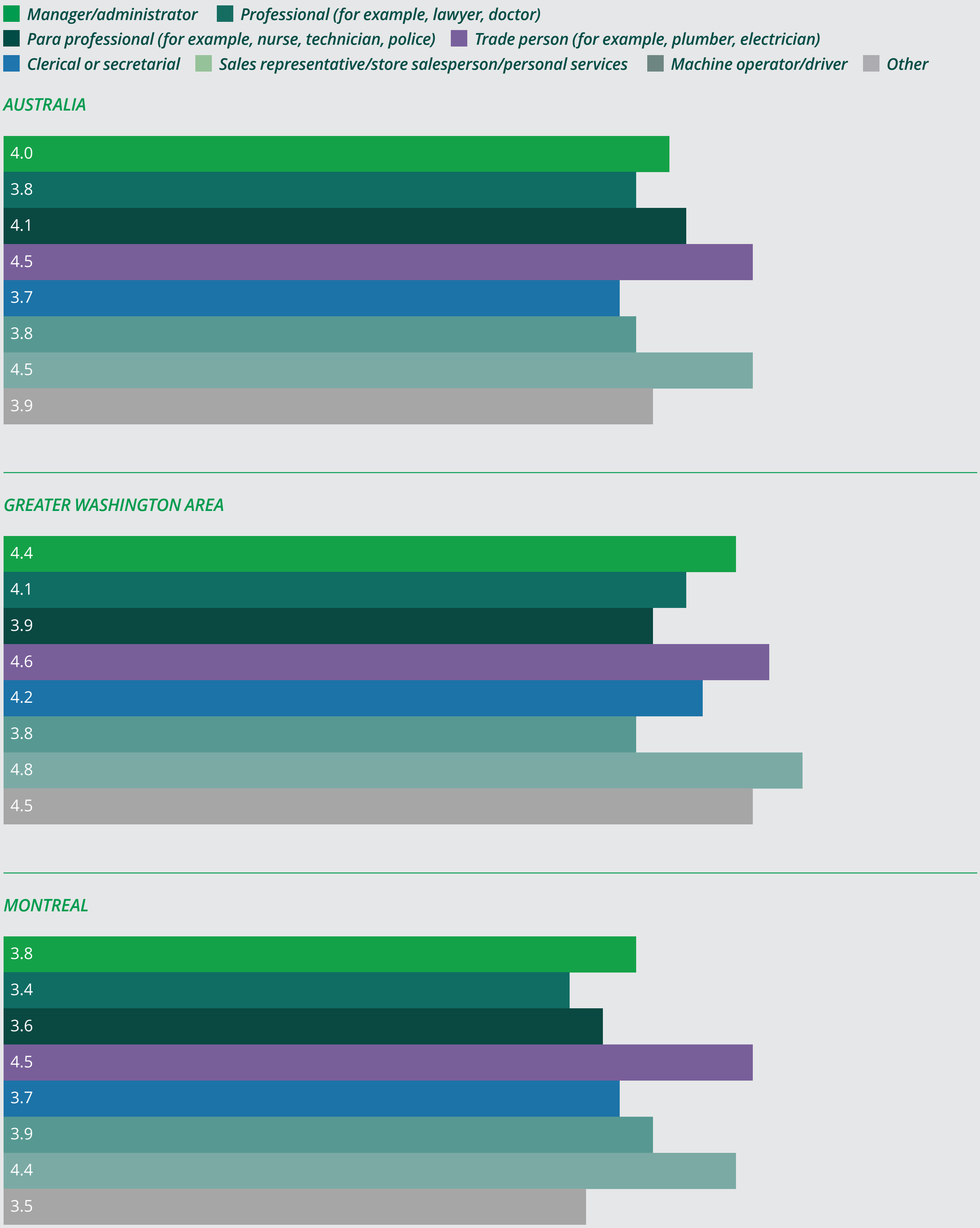


FIGURE 5: EXPECTED CHANGE IN THE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE (OR TRAVEL AROUND FOR THEIR JOB) OVER THE NEXT 12 MONTHS

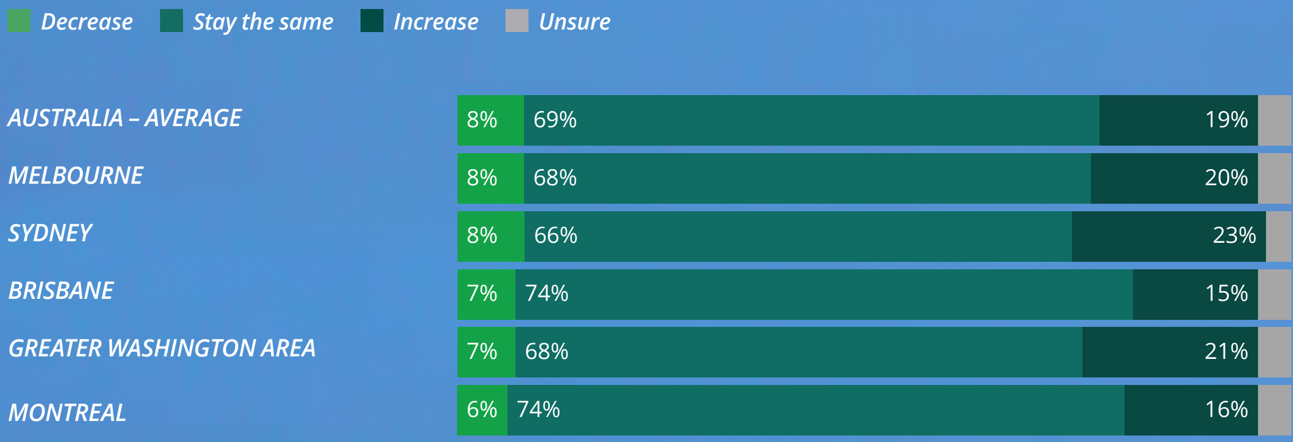
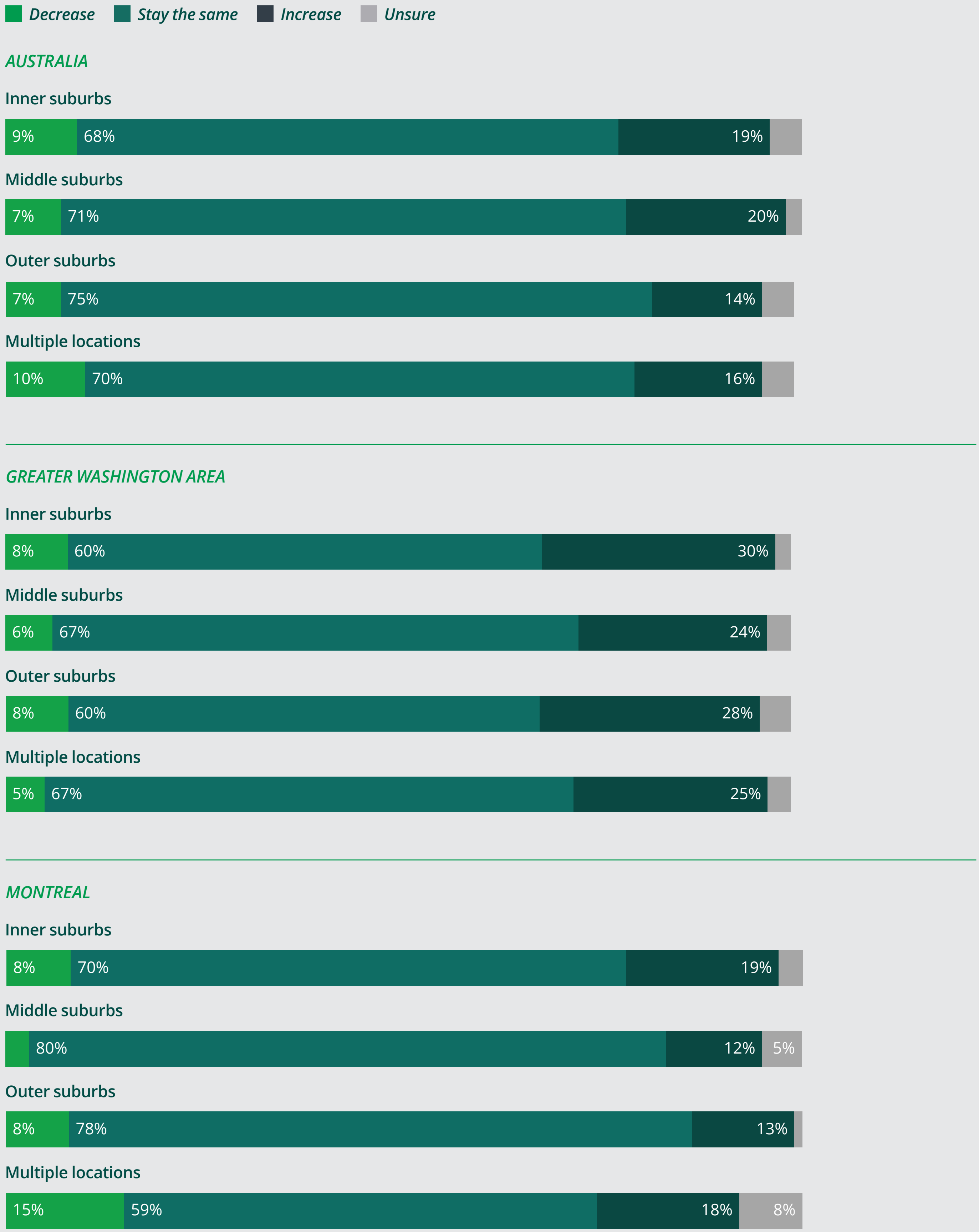
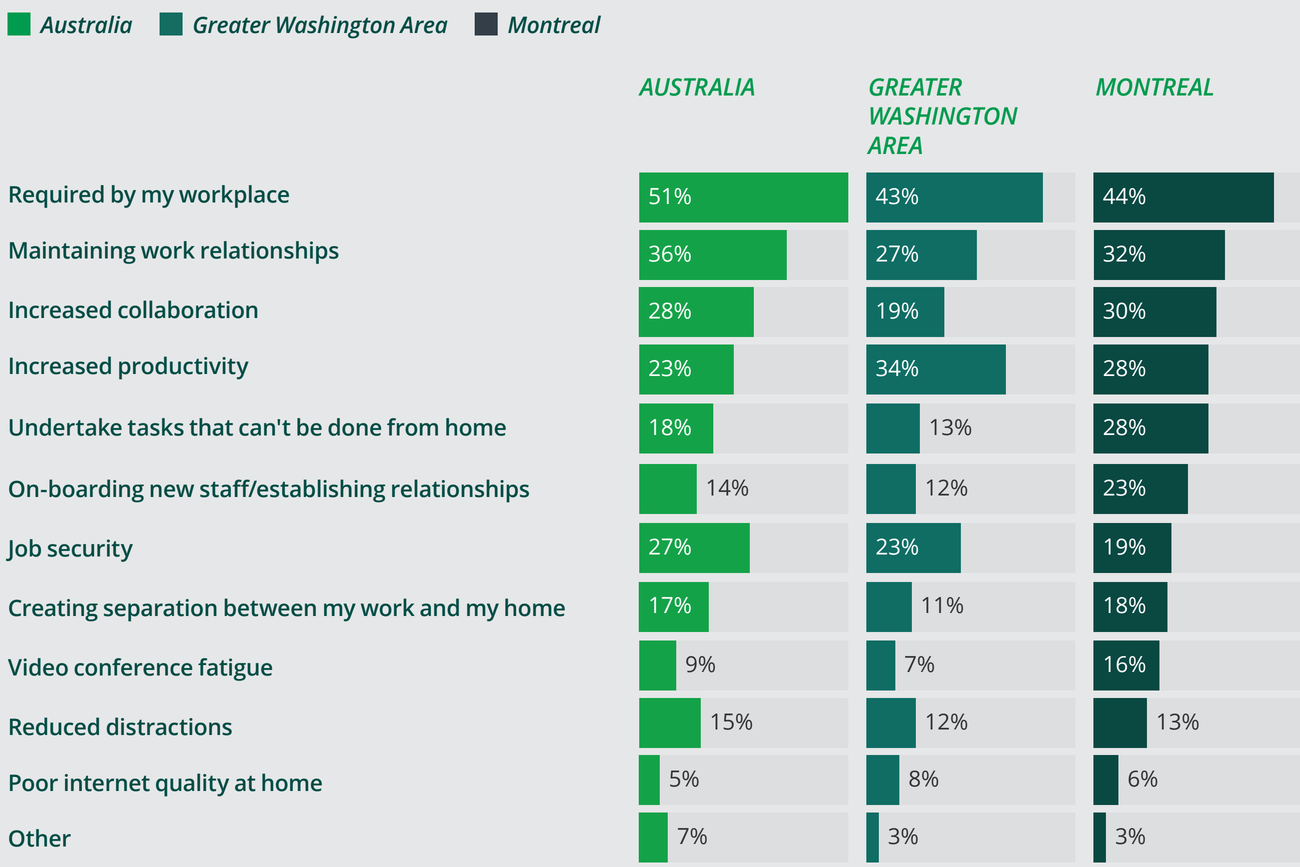


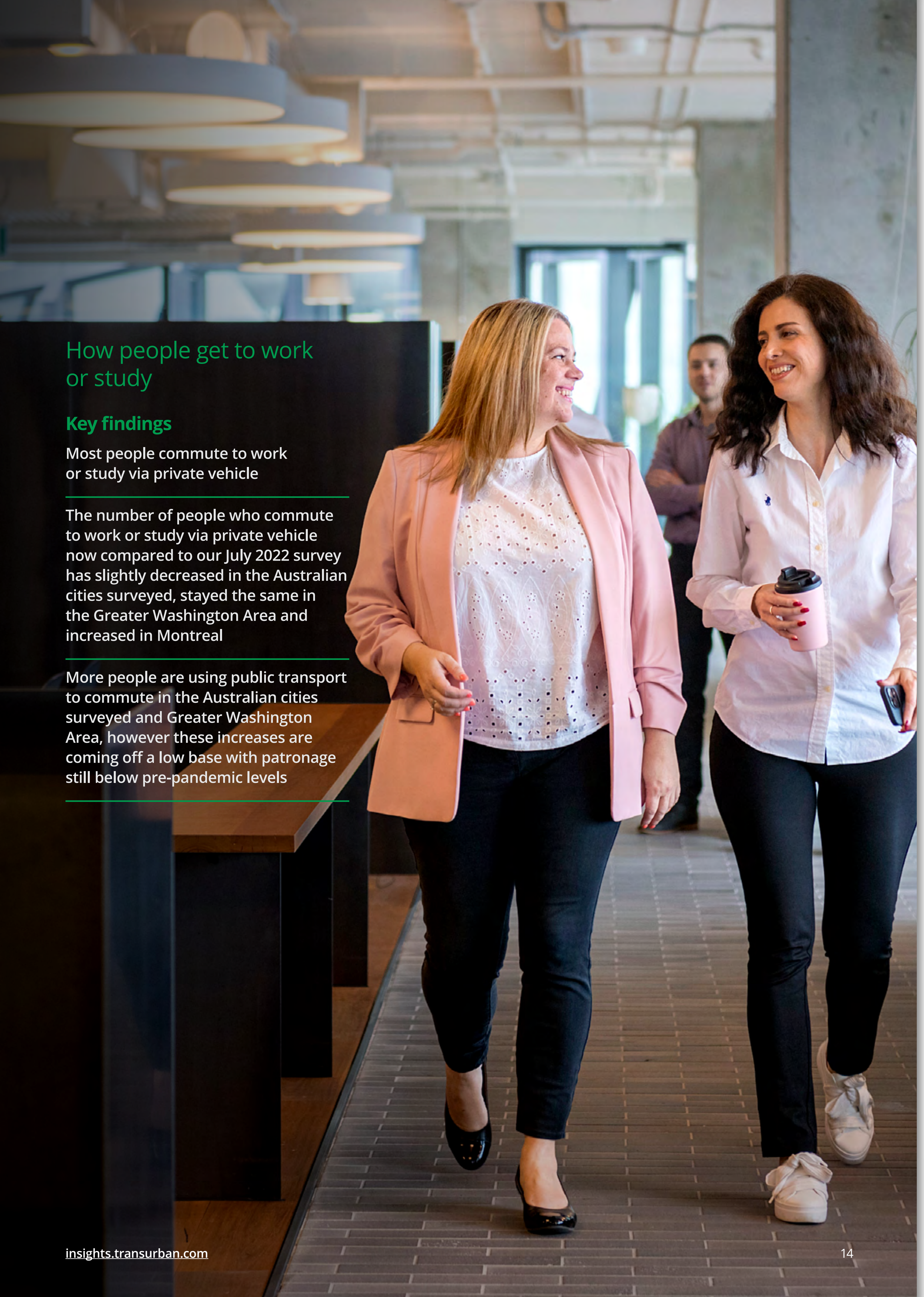
FIGURE 6: EXPECTED CHANGE IN THE NUMBER OF DAYS PEOPLE TRAVEL TO THEIR WORKPLACE (OR TRAVEL AROUND FOR THEIR JOB) OVER THE NEXT 12 MONTHS BY LOCATION OF EMPLOYMENT



Data shown is from respondents who primarily work in a location other than their home.

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





How people get to work or study

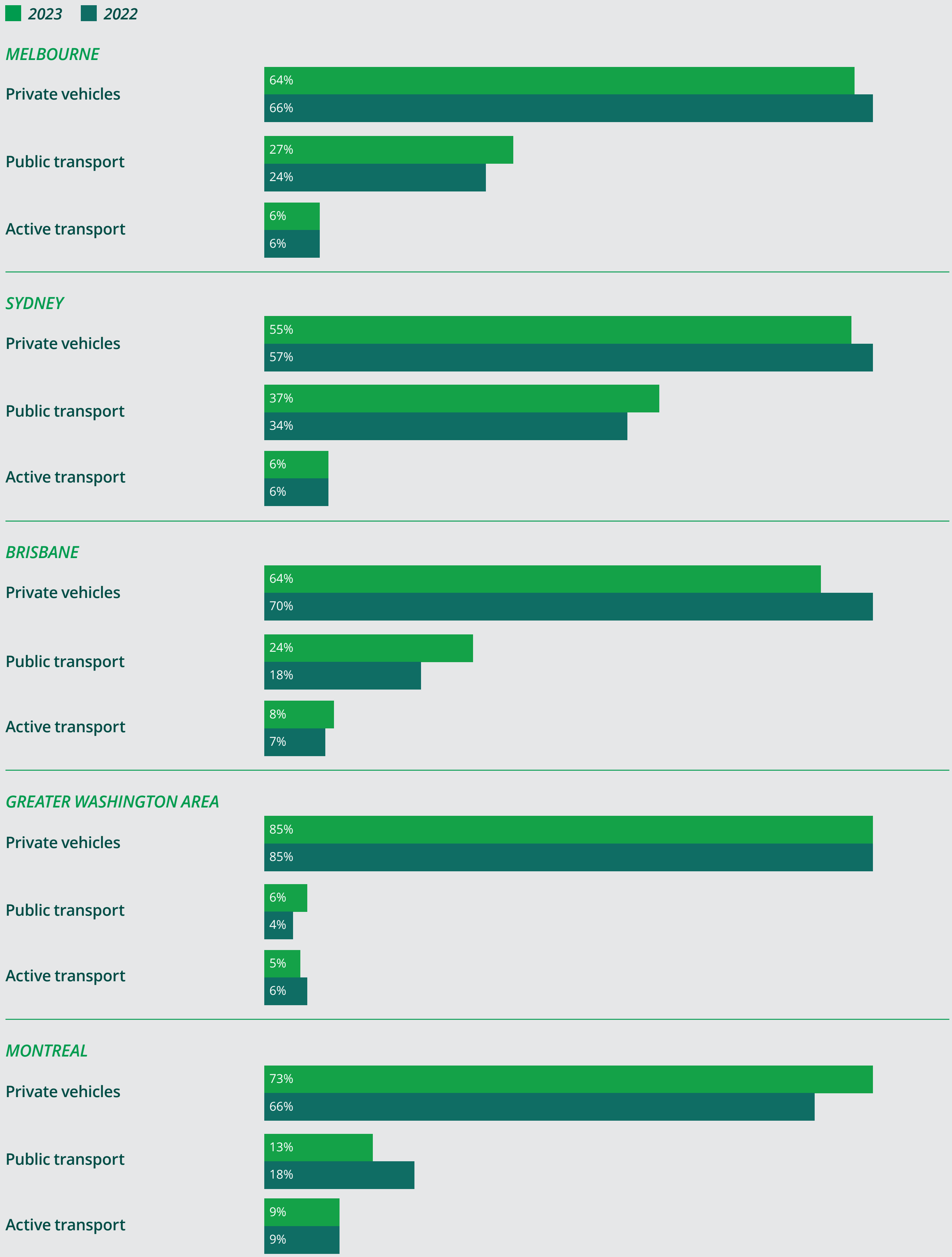
Key findings

Most people commute to work or study via private vehicle

The number of people who commute to work or study via private vehicle now compared to our July 2022 survey has slightly decreased in the Australian cities surveyed, stayed the same in the Greater Washington Area and increased in Montreal

More people are using public transport to commute in the Australian cities surveyed and Greater Washington Area, however these increases are coming off a low base with patronage still below pre-pandemic levels

FIGURE 8: MAIN MODE OF TRANSPORT USED TO COMMUTE TO (OR TRAVEL AROUND FOR) WORK/STUDY (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023)



This question was only asked of those who work or study outside of the home

Section 3: What's influencing travel

The **price of fuel** is the top transport-related cost-of-living concern, but concern has fallen steeply since July 2022

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

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

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

Transport costs

Groceries rank as the top cost-of-living concern across all cities surveyed in 2023 (Figure 9).

Despite fuel ranking in the top three, concern fell steeply in 2023 compared to results from our July 2022 survey. Similarly, most respondents do not consider, or only occasionally consider the price of fuel when making short and long trips or when commuting (Figure 10). Across all cities surveyed the price of fuel had less influence on people's driving decisions in 2023 compared to 2022.

Concern about mortgage repayments in Australia was the biggest increase between 2022 and 2023 of any item across the cities surveyed, with the number of respondents who nominated it as a top-five concern rising 8 percentage points.

Visit the Transurban Insights hub for further data on cost-of-living concerns broken down by gender and age, and data for each Australian city.

Key findings

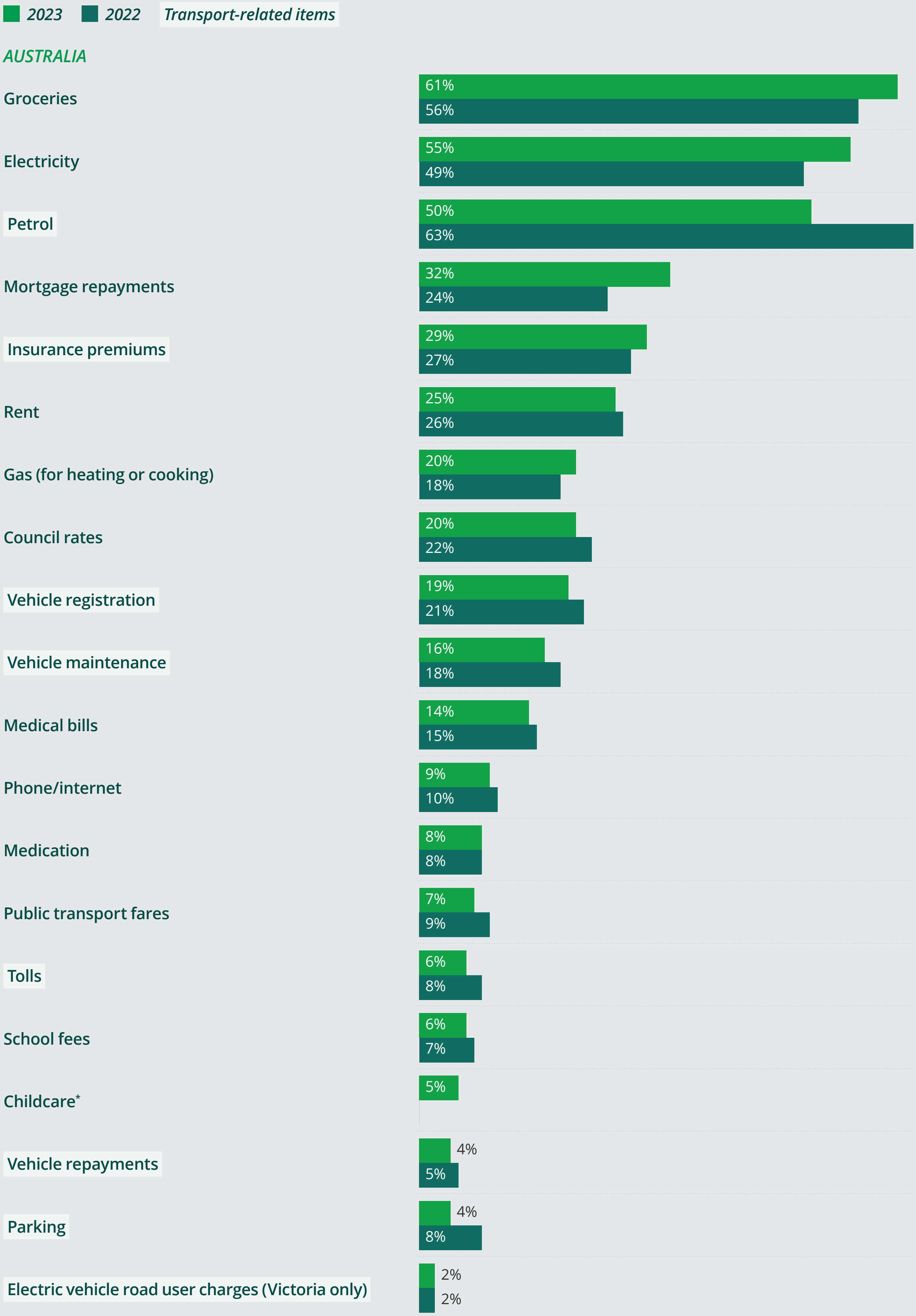
Cost of groceries is the top cost-of-living concern

In Australia, the number of respondents who nominated fuel prices as a top-five concern has declined by over 20% since 2022, while the number of respondents who nominated mortgage repayments as a top-five concern has increased by 33%

In the Greater Washington Area, concern for most household expenses decreased since 2022, with biggest decrease relating to concern about gas prices

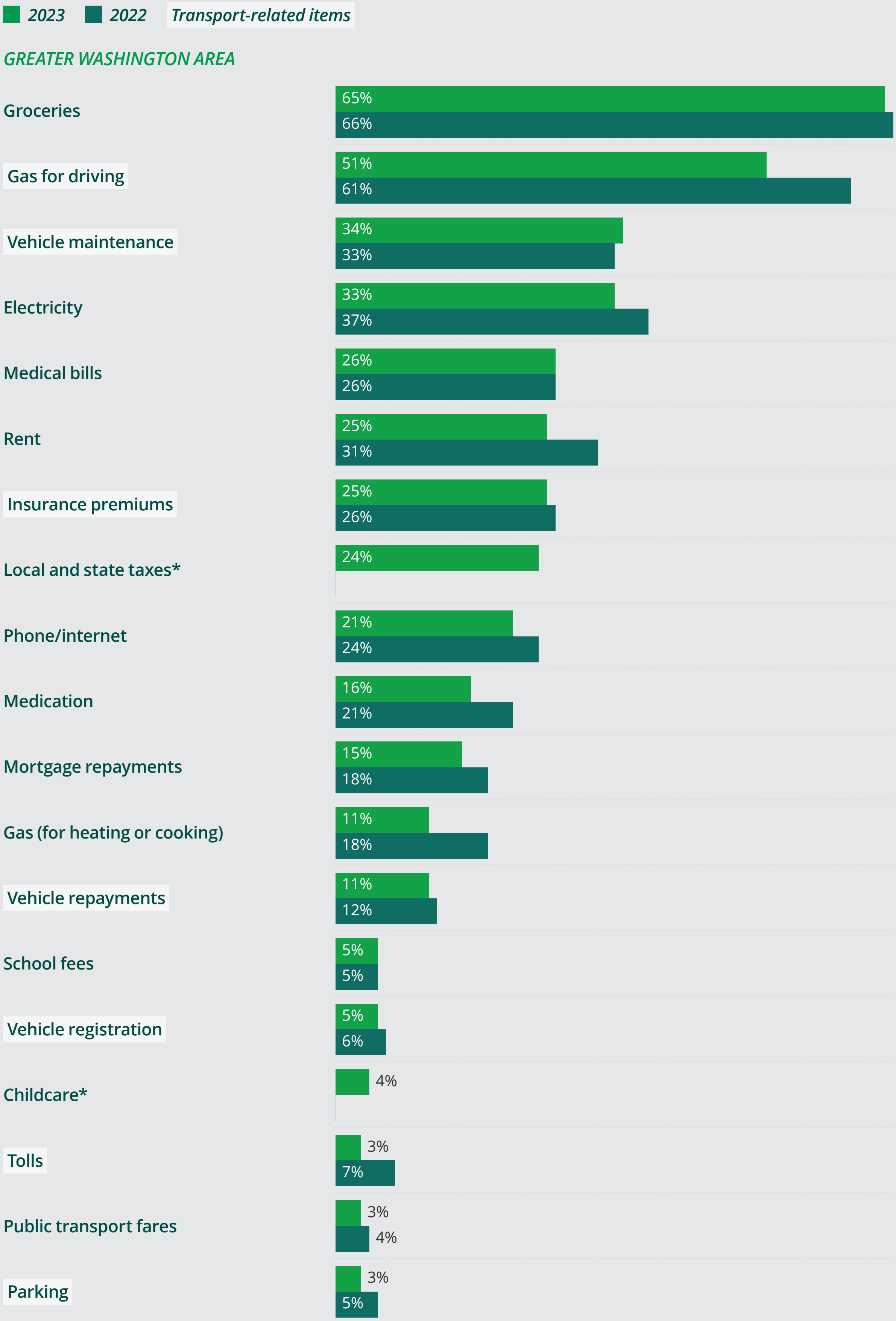
In Montreal, concern about groceries, mortgage repayments and vehicle registration increased while concern for all other household expenses decreased since 2022

FIGURE 9: CONCERN ABOUT TRANSPORT COSTS COMPARED TO OTHER COMMON HOUSEHOLD EXPENSES (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023)



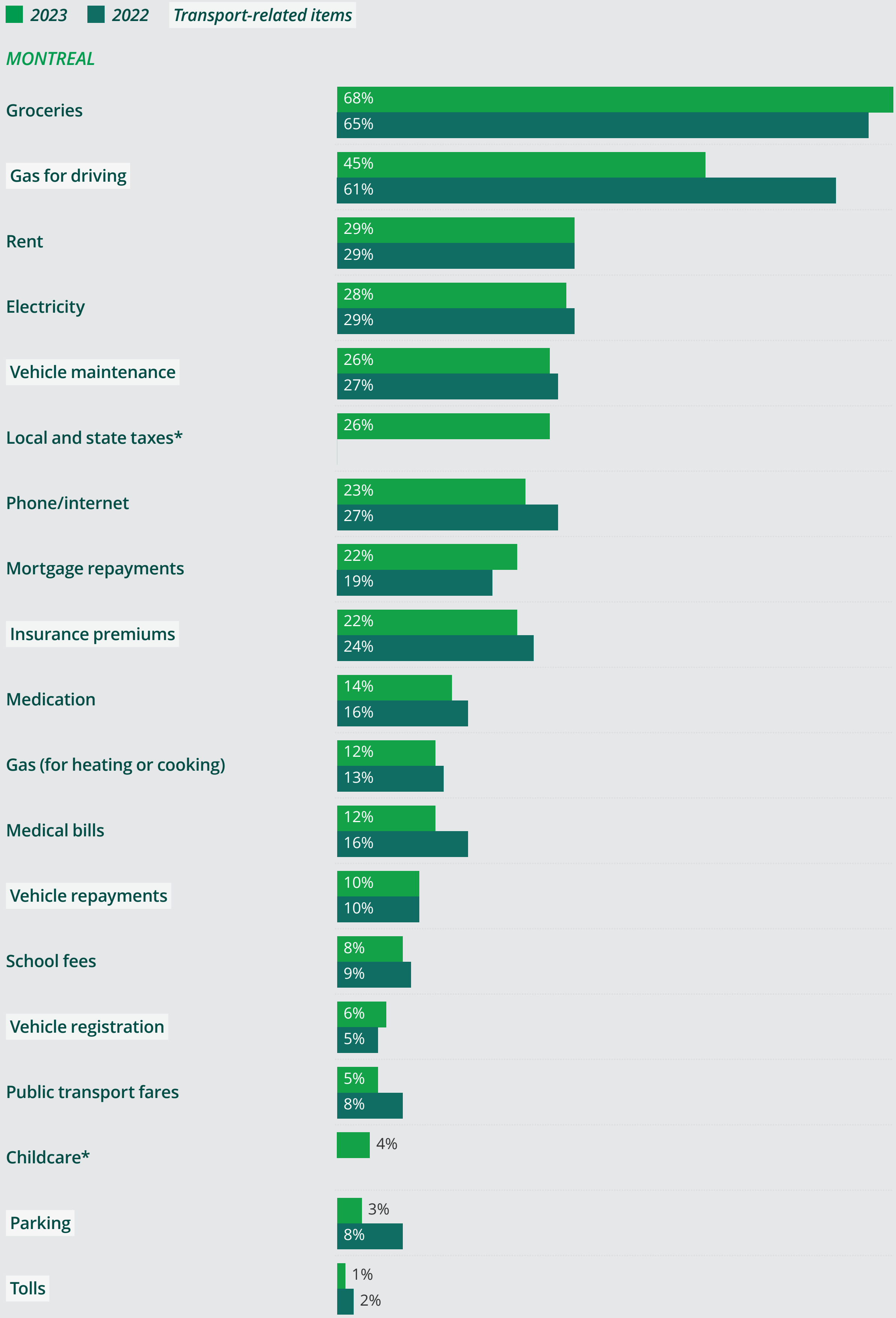
*Respondents were asked to nominate up to five expenses they were most concerned about   *This item was added in the July 2023 survey*

FIGURE 9: CONCERN ABOUT TRANSPORT COSTS COMPARED TO OTHER COMMON HOUSEHOLD EXPENSES (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023) CONTINUED



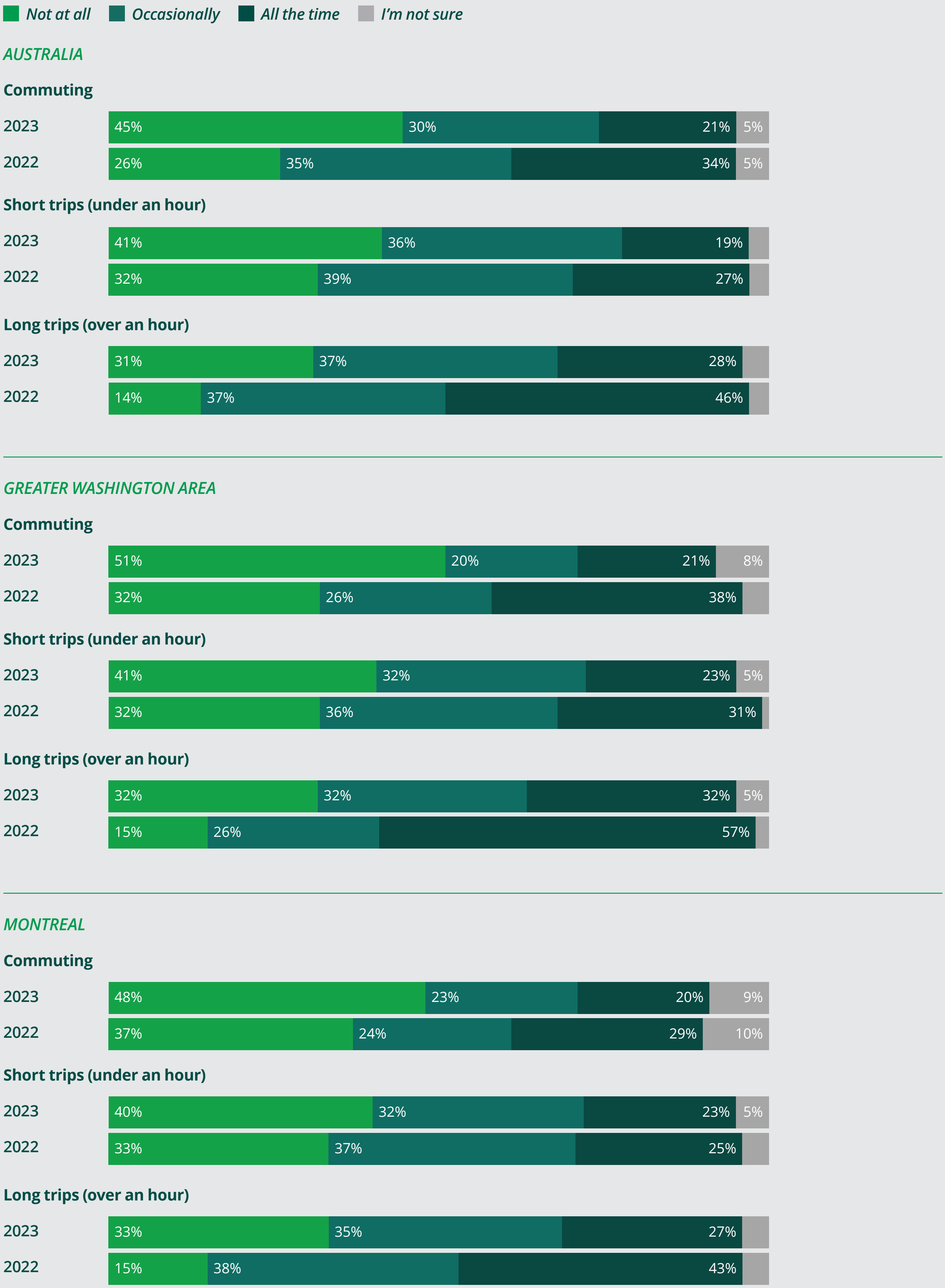
*Respondents were asked to nominate up to five expenses they were most concerned about   *This item was added in the July 2023 survey*

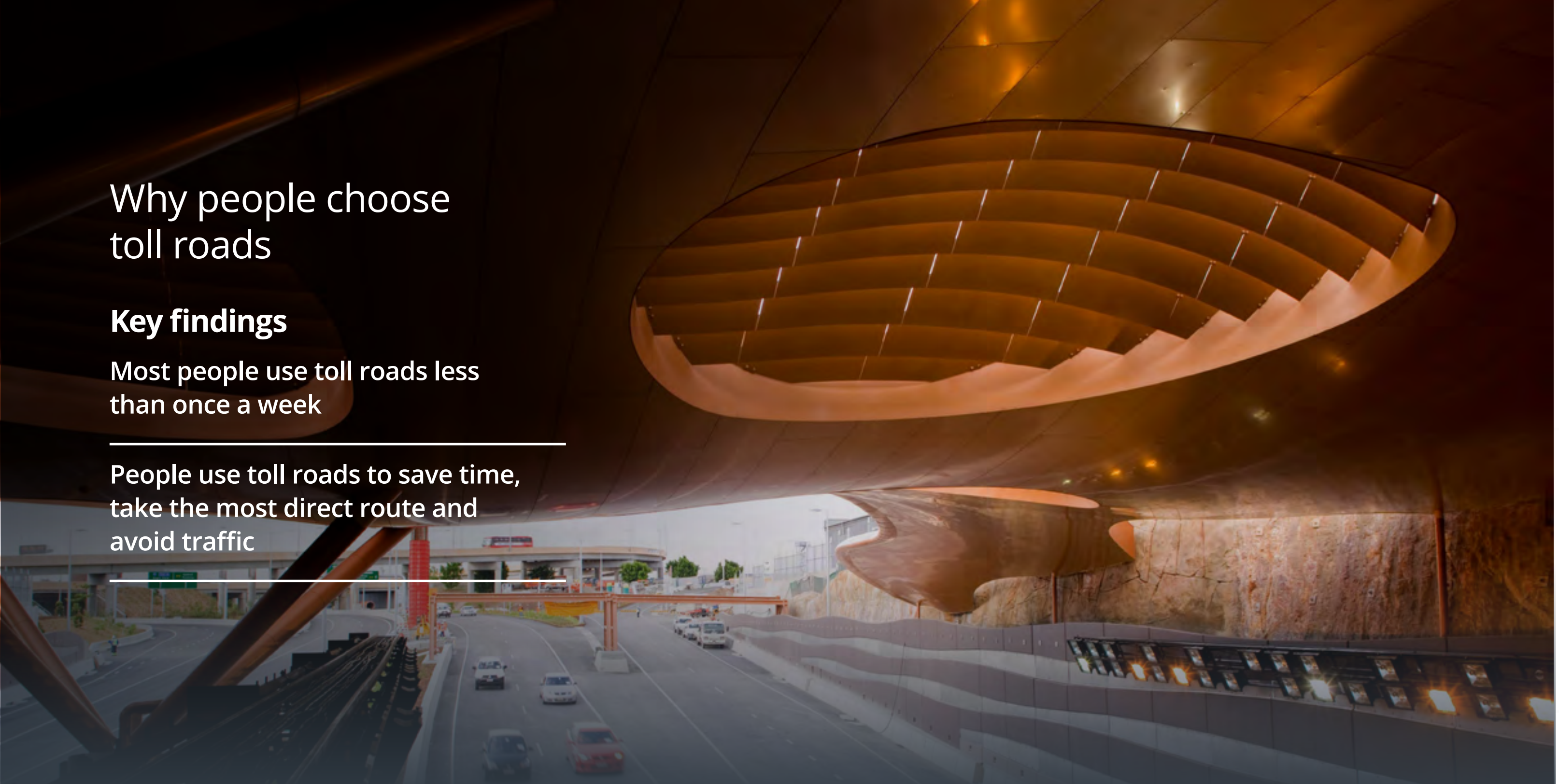
FIGURE 9: CONCERN ABOUT TRANSPORT COSTS COMPARED TO OTHER COMMON HOUSEHOLD EXPENSES (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023) CONTINUED



*Respondents were asked to nominate up to five expenses they were most concerned about   *This item was added in the July 2023 survey*

FIGURE 10: INFLUENCE OF FUEL PRICE ON TRAVEL CHOICES (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023)





Why people choose toll roads

Key findings

Most people use toll roads less than once a week

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

FIGURE 11: FREQUENCY OF TOLL-ROAD USE

	MELBOURNE	SYDNEY	BRISBANE	GREATER WASHINGTON AREA	MONTREAL
Commuter Once a day or more	3%	4%	2%	2%	2%
Frequent Once a week or more	18%	27%	20%	17%	10%
Infrequent Once a month or more	20%	24%	23%	15%	5%
Intermittent Once a year or more	33%	23%	34%	27%	17%
Non-user Less than once a year or never	27%	22%	21%	39%	66%

FIGURE 12: REASONS PEOPLE CHOOSE TO USE TOLL ROADS

	MELBOURNE	SYDNEY	BRISBANE	GREATER WASHINGTON AREA	MONTREAL
Saves time	59%	64%	60%	44%	48%
Most direct route	54%	50%	59%	57%	38%
Less traffic	27%	30%	29%	22%	31%
Saves fuel (shorter overall drive time)	25%	27%	26%	19%	15%
More consistent travel times	22%	15%	19%	13%	13%
Safer to drive on	7%	13%	8%	9%	12%
No other transport option available (such as untolled road, public transport)	10%	11%	9%	19%	12%
Fewer greenhouse gas emissions	3%	3%	2%	2%	5%
Other reason	1%	2%	2%	3%	3%

Respondents were asked why they use toll toads, such as those managed by Transurban as well as other operators

Section 4: Transport infrastructure

Cost of living is the top issue for respondents across all cities surveyed

Most people are concerned about **congestion**

Most people are in favour of the **private sector working with governments** to deliver transport infrastructure

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

Public priorities

Cost of living is the number one issue that respondents across all cities surveyed want addressed (Figure 13). The number of respondents who nominated cost of living as a top-three issue has increased in the Australian cities surveyed and Montreal since our July 2022 survey, while the number dropped in the Greater Washington Area.

Other top issues are housing affordability and supply in Australia, hospitals and healthcare in Montreal and jobs and economic development in the Greater Washington Area. Visit the Transurban Insights hub for further data on top issues, broken down by gender and age.

While road infrastructure and congestion ranked in the middle of the list of issues, most people we surveyed are concerned about congestion. In the Australian cities surveyed more than 60% of respondents said they are concerned by current levels of congestion. Congestion is a concern for more than half of people in the Greater Washington Area (58%) and Montreal (53%) (Figure 14).

Population growth within these cities will put further strain on transport infrastructure over the next decade. For example, it's expected almost 2.8 million people will migrate to Australia between now and 2034,[4] with most settling in major cities.[5]

Our survey found that people are even more concerned about the potential levels of congestion they might experience in 10 years' time and the ability for transport infrastructure to keep pace with population growth.

Concern is highest in Brisbane, where Transurban's transport modelling team predicts congestion will rise by 23% over the next decade.

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 this context, the private sector could be used to help plug funding gaps and deliver critical transport infrastructure through public-private partnership arrangements.

Key findings

Cost of living is the top issue for respondents across all cities surveyed

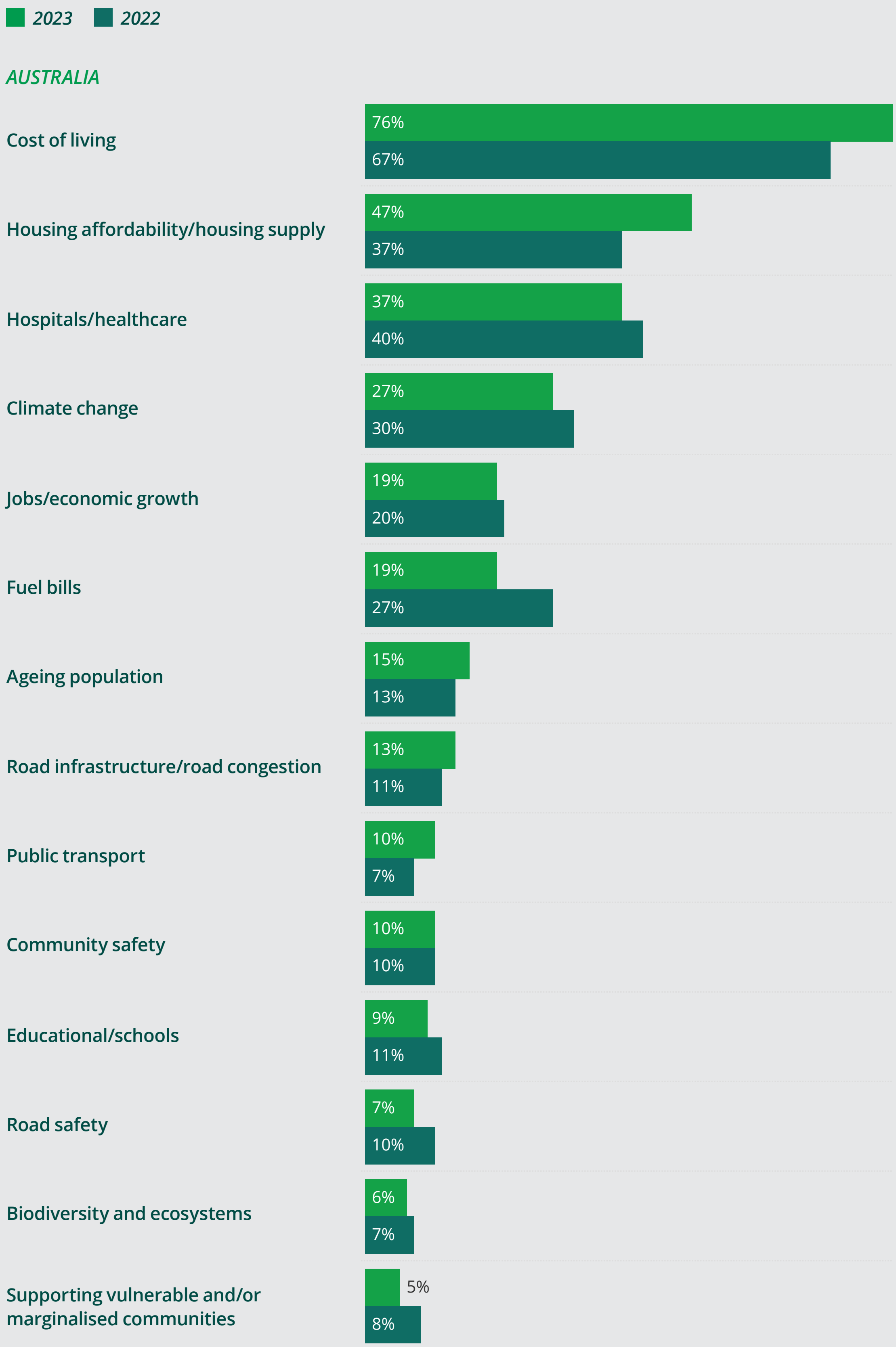
The number of people who nominated cost of living as a top-three issue increased by 13% in Australia and 9% in Montreal since our July 2022 survey, but declined by 8% in the Greater Washington Area

Most people are concerned about current levels of congestion, with even more people concerned when considering potential levels of congestion in 10 years' time

4 *Centre for Population Projections, Budget 2023-24: population projections, Australia, 2023-24 to 2033-34*

5 *Centre for Population 2022, Population Statement: Capital City and Rest-of-State Population Projections, 2021-22 to 2032-33*

FIGURE 13: ISSUES THAT CURRENTLY REQUIRE FOCUS (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023)

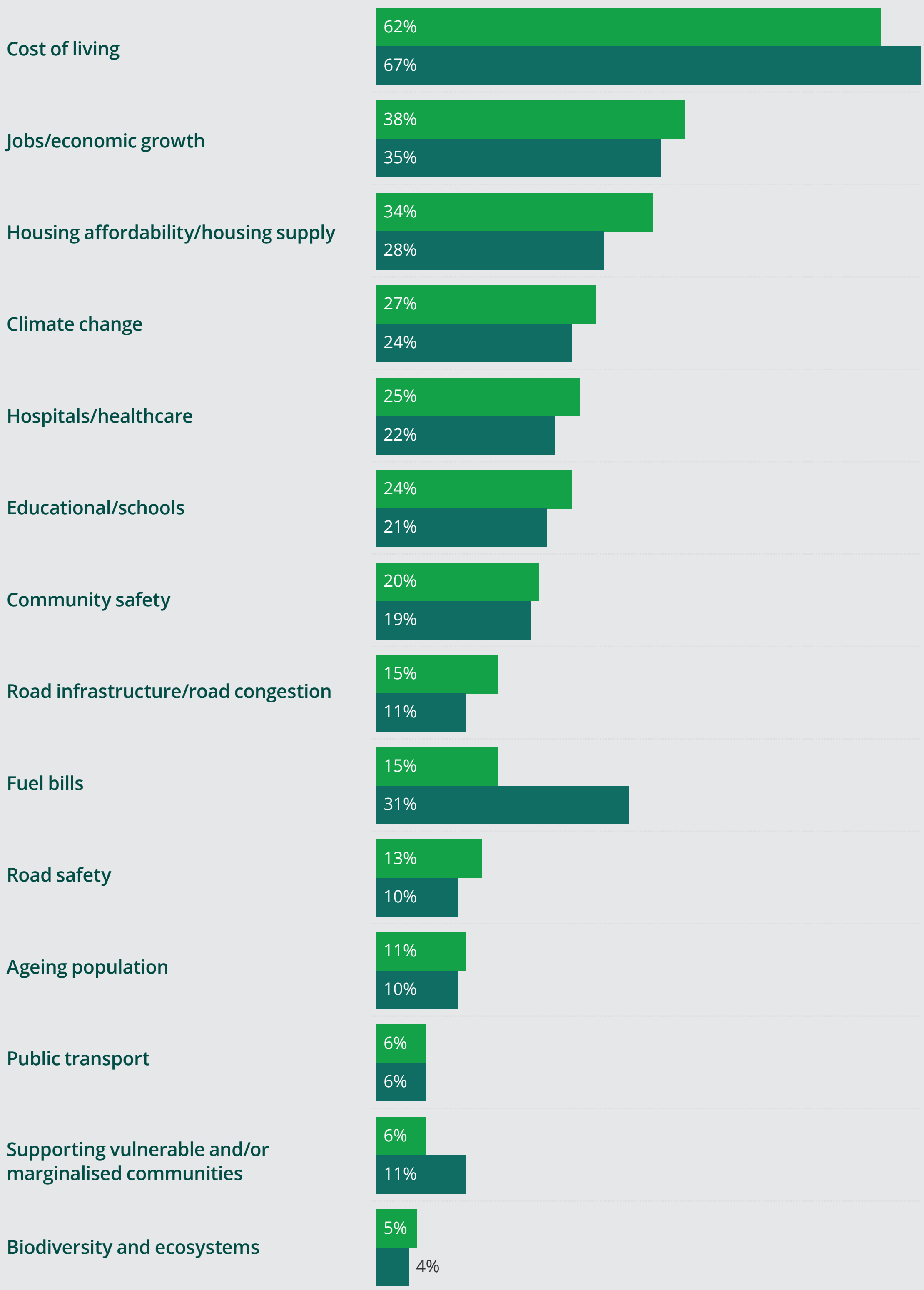


Respondents were asked to nominate the top-three issues they think require more focus

FIGURE 13: ISSUES THAT CURRENTLY REQUIRE FOCUS (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023) CONTINUED

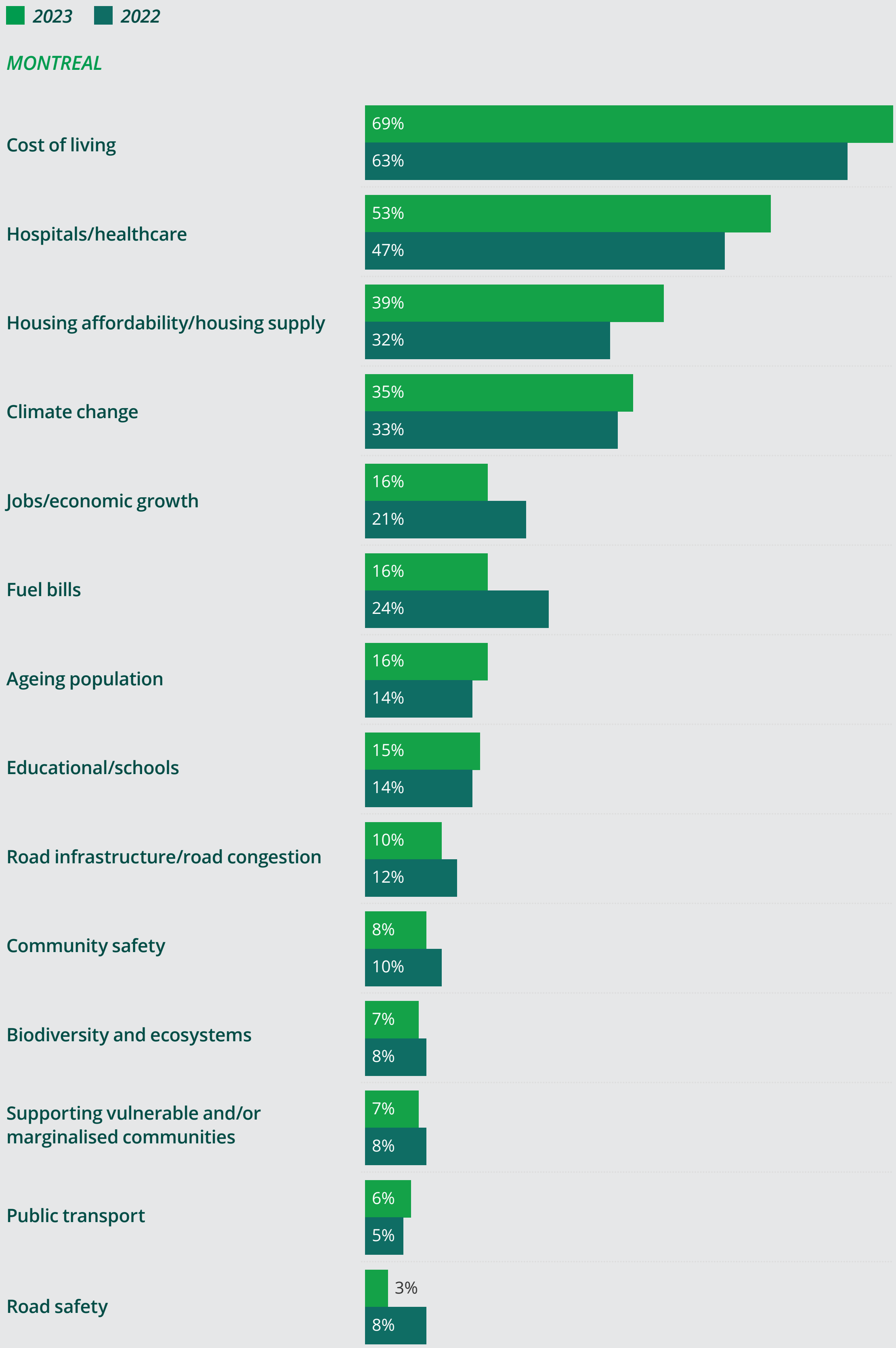
2023 *2022*

GREATER WASHINGTON AREA



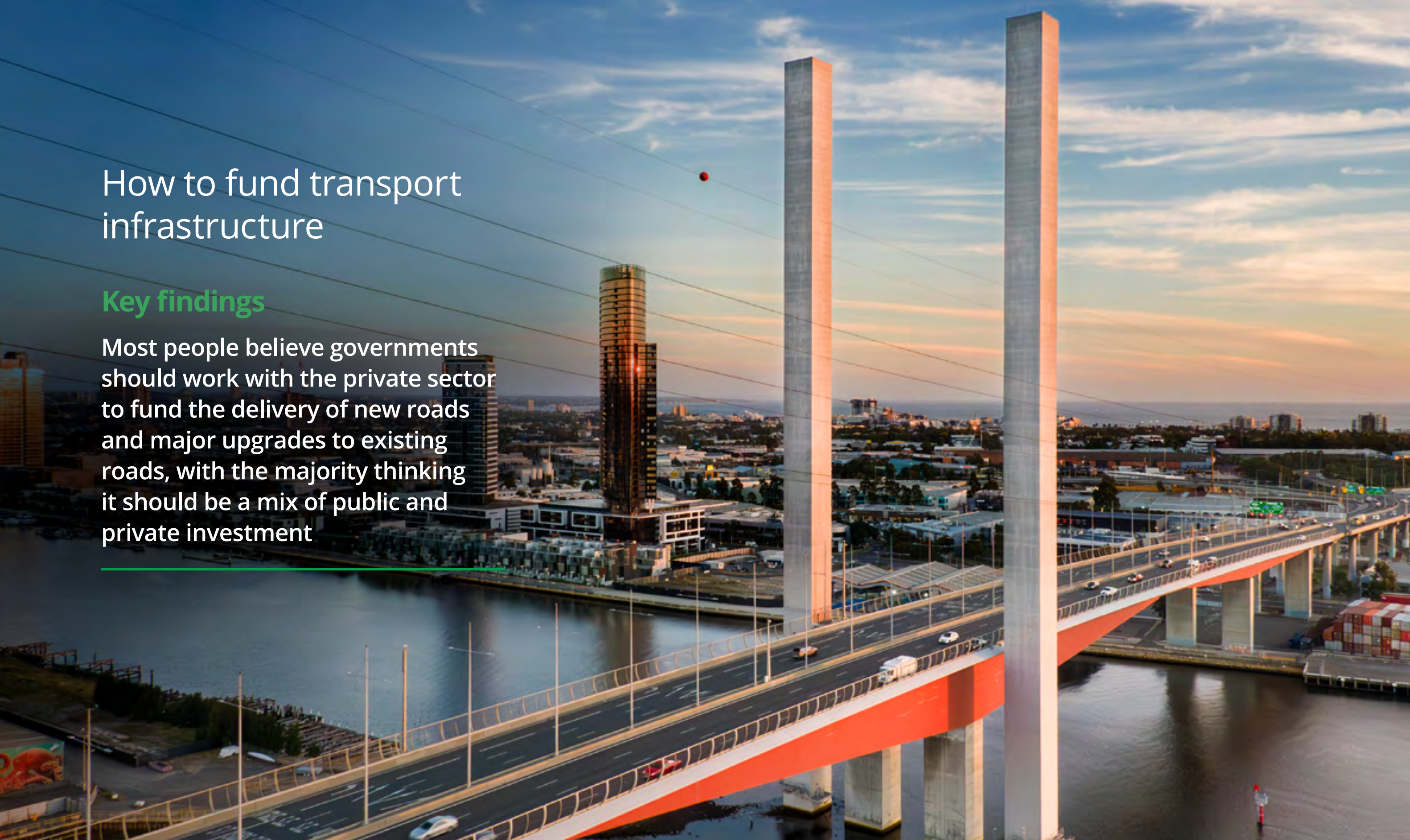
Respondents were asked to nominate the top-three issues they think require more focus

FIGURE 13: ISSUES THAT CURRENTLY REQUIRE FOCUS (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023) CONTINUED



Respondents were asked to nominate the top-three issues they think require more focus

FIGURE 14: PERCENTAGE OF PEOPLE CONCERNED ABOUT CONGESTION NOW AND IN TEN YEARS' TIME



How to fund transport infrastructure

Key findings

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 15: ROLE OF PRIVATE SECTOR IN FUNDING THE DELIVERY OF TRANSPORT INFRASTRUCTURE (COMPARING SURVEY RESULTS FROM JULY 2022 TO JULY 2023)

- *Governments should allow private investment*
- *Governments should allow a mix of government and private investment*
- *Governments should never allow private investment*

	Year	Governments should allow private investment	Governments should allow a mix of government and private investment	Governments should never allow private investment
AUSTRALIA	2023	10%	64%	26%
	2022	16%	62%	22%
GREATER WASHINGTON AREA	2023	16%	66%	18%
	2022	16%	67%	17%
MONTREAL	2023	13%	59%	28%
	2022	19%	59%	22%

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