



THE UNIVERSITY OF
SYDNEY
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Business School

Transport Opinion Survey (TOPS)

September 2023

Institute of Transport and Logistics Studies (ITLS)

Highlights

Note: This survey was conducted from September 7th to September 18th, 2023. Public confidence in transport has recovered from the last survey wave in March 2023, which has seen the lowest confidence since 2018. The near-term and long-term transport confidence for both local areas and Australia have all increased by more than 10%, but still lower than the highest levels of recent years in September 2022. The public is under a high cost of living and housing shortage. Housing has become not only the most prominent national priority (chosen by 51% of Australians) but also the single issue with the highest increase, with an additional 10% of Australians choosing it. The improvement in public transport is the most significant contributor to public thinking that transport will improve in one year. The public has noticed improvements in public transport, such as better on-schedule services and fewer industrial actions. The infrastructure damage, poor roads, and increasing congestion are the biggest concerns that cause some Australians to think that transport will worsen in one year. Despite soaring petrol prices and cost of living, online shopping behaviour and expenditures across categories of goods have increased slightly, showing an increase in families' online spending. Average working hours have decreased slightly compared to March 2023. On the other hand, the proportion of the population who did paid work in the last two weeks has increased by 7% compared to March, showing more people, including those who were not in the workforce, are more involved in doing some casual work or additional hours in their main position, to cope with the increasing cost of living. The proportion of work-from-home (WFH) hours has reduced from 27% out of the total working hours in March to 21%, primarily due to the reduction of WFH hours among people who work in professional and sales occupations. The WFH proportions have stayed stable or increased/decreased slightly among workers in other occupations.

Housing and economy/employment are the two highest-priority national issues

- In March 2023, 44% and 42% of Australians nominated economy/employment and housing as the top two priorities. In September 2023, these two areas still hold the top two spots, but housing has become a more dominant issue. About 51% of Australians nominated housing as the most pressing issue, increased from 42% in March. This shows that there is no ease in the housing situation. Instead, it has become a more severe problem influencing more Australians. There is less concern about the economy and employment (dropped from 44% in March to 41%), reflecting the circumstances in recent months, such as the RBA holding a further interest rate rise and a stable unemployment rate. This finding is unsurprising, given the heavy media coverage and debates on related policies.

Public transport and road improvements are the top priorities for transport

- In September 2023, 30% of Australians said that public transport improvement is the highest priority issue for transport in Australia, up from 25% in March 2023. About 24% of Australians said road improvement is the top priority, the same as in March 2023. Economic and financial problems have remained at 21%, equivalent to the March 2023 level.

Opinions on transport in local areas have improved since March 2023

- In September 2023, 28% of Australians said that transport in their local areas was worse than one year ago, slightly lower than 29% in March 2023. In contrast, 11% of Australians said that transport in local areas is better than one year ago, up from 8% in March 2023. People with neutral or no opinions have decreased slightly from 63% in March 2023 to 62% in September 2023.

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

- In September 2023, 15% of Australians said that transport in their local area would be better in one year, slightly up from 14% in March 2023.

Australians have more confidence in transport in Australia in the short-term.

- In September 2023, 17% of Australians thought that transport in Australia would improve in one year, up from 14% in March 2023. In contrast, 27% of Australians thought that transport in Australia would worsen in one year, down from 29% in March 2023.

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

- In September 2023, 36% of Australians thought that transport in Australia would improve in five years, up from 29% in March 2023. In contrast, 27% of Australians thought that transport in Australia would worsen in five years, down from 29% in March 2023. People with neutral or no opinions have decreased from 42% in March 2023 to 37% in September 2023.

ITLS Index of Transport Confidence

- Compared to March 2023, in September 2023, Australians are more confident about transport in their local area (Confidence index: up from 76 to 85). The same is true for transport across Australia in one year (Confidence index: up from 67 to 81) and in five years (Confidence index: up from 79 to 90). Overall, all indexes have increased significantly compared to March 2023. However, the confidence levels have not recovered to those recorded in September 2022 at 94, 91 and 96, respectively, for the previously mentioned measures.

About 78% of Australians ordered online in the last four weeks.

- About 78% of Australians made online order(s) in the previous four weeks, up from 70% in March 2023. For those who ordered online, the average spending of \$395 in the last four weeks is also higher than \$370 in March 2023. They spent 50% on groceries, clothing & apparel (more than 49% in March 2023). Overall, 63% of online spending is delivered to home or other locations, slightly less than 65% in March 2023. About 58% of online grocery shopping is delivered, less than 59% in March 2023. Among the 78% of Australians who made online order(s) in the last four weeks, about 36% of total grocery spending was made online, a large increase from 30% in March 2023, with the remaining 64% of expenditures made in stores.

Working people spend 21% of their work time working from home (WFH)

- About 69% of Australians have undertaken paid work in the last two weeks, up from 64% in March 2023. In contrast, the average number of working days in the last two weeks have dropped from 8.08 days in March 2023 to 7.95 days in September 2023. There are more Australians who were not working in March 2023 such as students, those who were looking for work, people with home duties and retired people doing few hours of work. This change has increased the size of the working population but reduced average working hours.
- Of all the working hours, 21% are WFH hours, which has decreased from 27% in March 2023. This change was primarily related to changes in working patterns in two occupations: professionals and sales. Professionals have lowered the WFH proportion from 35% in March 2023 to 21% in September 2023. During the same period, sales workers have reduced the WFH proportion from 28% to 15%. For the other occupations, such as managers, technicians, community workers and clerical/admin workers, the WFH proportions have either remained stable or changed slightly. Since professionals and sales workers account for over 37% of the total working population, their WFH proportions significantly impact the overall average WFH level.
- Wednesday, Monday and Tuesday have the highest levels of WFH, with 63%, 61%, and 60% of those who WFH during weekdays working from home on these three days. In contrast, only 52% and 55% of employees WFH work from home on Friday or Thursday during weekdays. Over 90% of those who WFH during weekends work from home on Saturdays.
- About 42% of employers have stipulated that workers must return to the office a particular number of days during a week.

- About 94.7% of people who WFH have made some trips for purposes such as leisure, shopping, or other personal businesses on the same days that they WFH. Driving, walking and taking trains are the three top transport modes.

About the Transport Opinion Survey

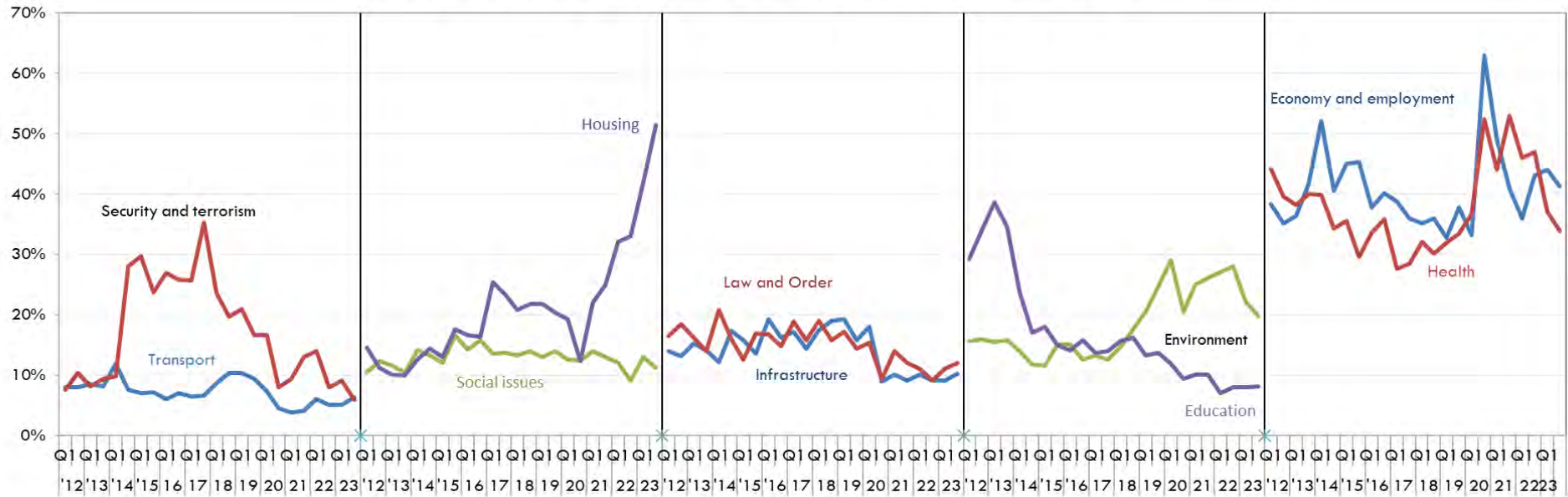
The Transport Opinion Survey is a biannual survey (quarterly from 2010) of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. The survey methodology was changed to an online survey in March 2014, using an online panel. The September 2023 survey was conducted between the 7th and 18th of September 2023. This report is based on the data from 1,029 completed responses.

Transport as a national priority

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

- People's opinions on national priorities reflect public concerns about the housing crisis. Housing is rising as the top priority, with 51% of Australians selecting it as the top priority, a sharp increase from 42% in March 2023. Public views of the soaring cost of living from food, energy, fuel and other items have eased slightly with recent RBA decisions to hold the interest rate. Economy and employment (41%) is the 2nd top priority, dropping from 44% in March 2023. The finding is unsurprising, given the recent heavy media coverage and policy debates on housing. Other priorities that have decreased from the March 2023 survey include health (down from 37% to 34%), environment (down from 22% to 20%), and security and terrorism (down from 9% to 6%). Other priorities such as transport (5% to 6%), infrastructure (9% to 10%), and law and orders (11% to 12%) have increased slightly.
- Housing availability and affordability across Australia have been widely covered in the media. Discussions and debates on how to solve the housing crisis have also been heated in both governments and the media. Indeed, housing has reached its highest priority level since the start of the TOPS survey in 2010, showing the severity of the problem. With both skyrocketing housing and construction prices and the lack of supply and short-term solutions, housing will remain a top national priority for the coming months and even years.
- Regardless of the severity of climate change, Australians are less concerned about the environment at 20%, down from 28% a year ago. We don't think this means people have less environmental concern, but it reflects public views on the urgency levels compared to the housing crisis and cost of living.
- About 10% of Australians nominated infrastructure, and 6% selected transport as one of Australia's two highest priority issues, slightly up from March 2023.

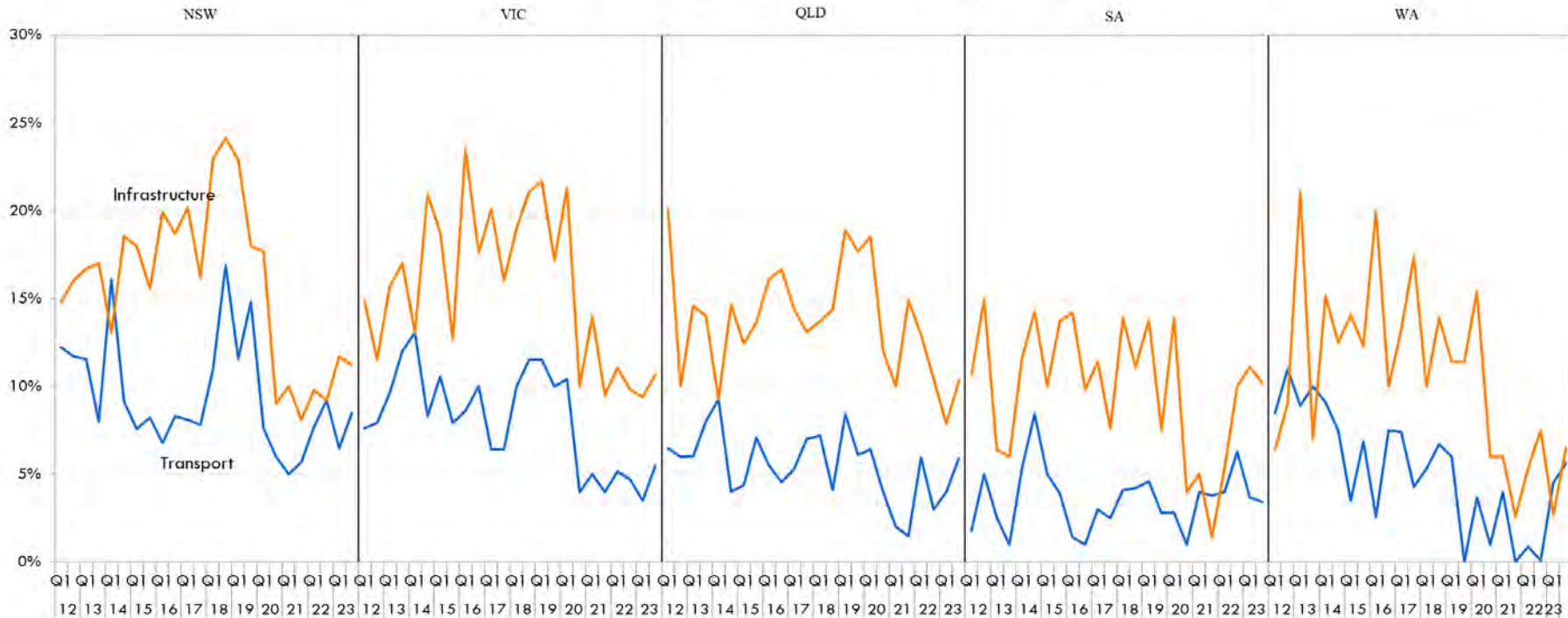
Issues selected as one of the top 2 priority issues in Australia, 2012 March - 2023 September



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

The priority of transport and infrastructure at the national level is regarded differently by residents in different states. The percentages of residents of most states nominating infrastructure and transport as top priorities have not significantly changed compared to March 2023. In September 2023, 9% of New South Wales residents selected transport as a priority compared to 6% of Victoria residents, 6% of Queensland residents, 3% of South Australia residents and 6% of Western Australia residents. About 11% of New South Wales and Victoria residents, 10% of Queensland and South Australia residents and 7% of Western Australian residents selected infrastructure as one of the top two priorities.

Transport and infrastructure as highest priority issues by state, 2012 March - 2023 September



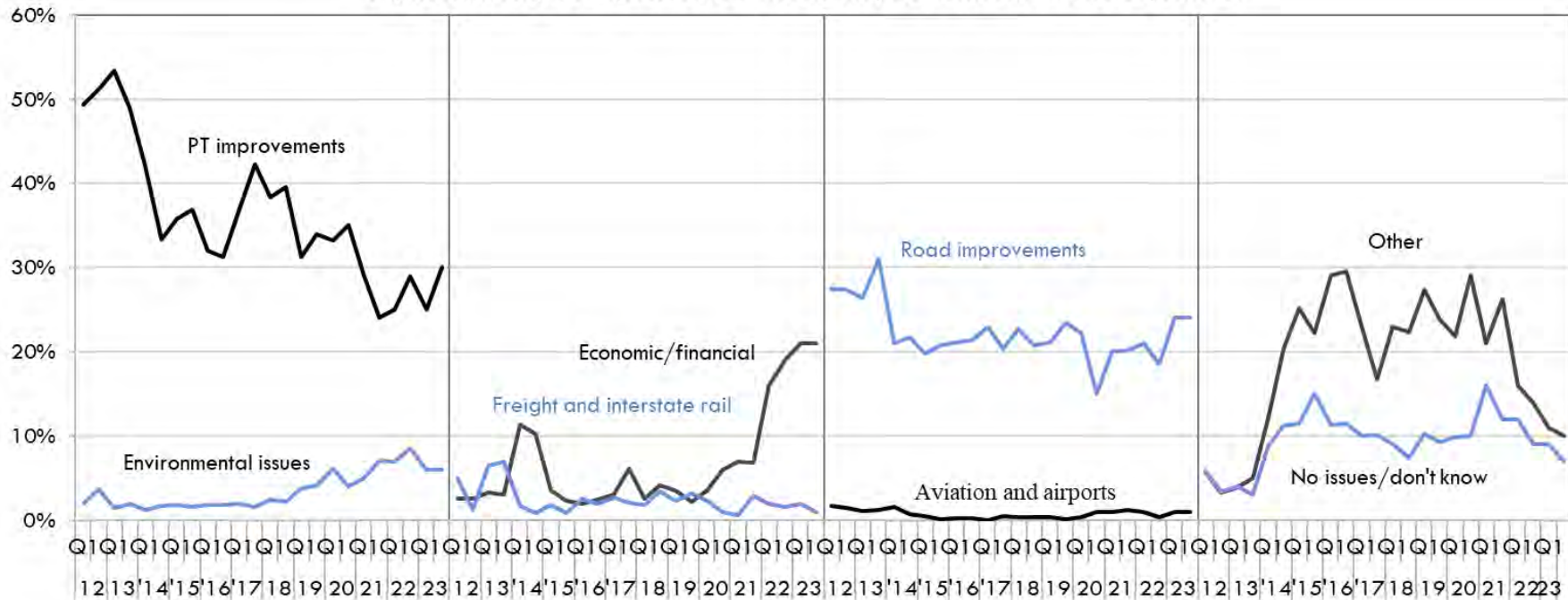
Highest priority issue for transport

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

- About 21% of Australians said that the highest priority for transport in Australia is economic and financial issues, identical to the level in March 2023. This priority on the economic and financial issues for transport has not been this high. Before March 2022, the level for this priority was typically below 10%. The two waves of TOPS in 2023 have shown that Australians have felt the impact of higher costs in everyday travel, from fuel prices to public transport fares, under the overall environment of high cost of living.
- About 24% of Australians said road improvement is the highest priority issue, identical to March 2023. Nearly 30% of Australians said public transport improvement is the top priority, increased from 25% in March 2023. For road improvement, many people cited poor conditions of roads as well as heavy congestion on roads. Some have mentioned there were more cars and trucks on the roads. Public transport improvements are related to the public transport service issues, including delays and cancellations in recent months.

- People nominated fewer various priorities as "other" priorities, with only 10% classified as other priorities, dropping from 11% in March 2023. Only 6% of Australians selected environmental issues as a top priority for transport, identical to the level in March 2023.

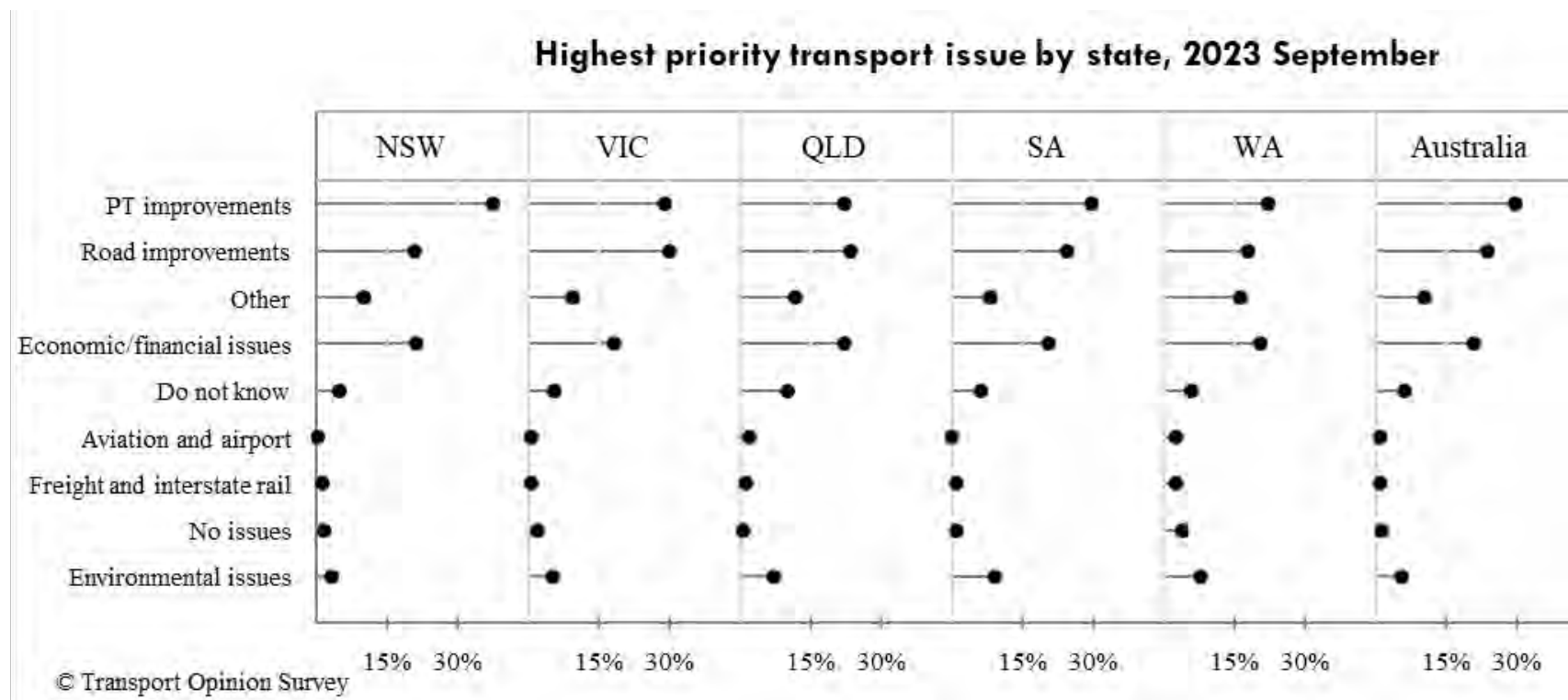
Highest priority transport issue in Australia, 2012 March - 2023 September



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

- In the September 2023 survey, New South Wales residents consider public transport improvements much more important than road improvements (38% vs. 21%). The nomination level for public transport improvements is also much higher in NSW than the national average (38% vs. 30%). South and Western Australians consider public transport improvements more important than road improvements (30% vs. 24% in SA and 22% vs. 18% in WA).
- In contrast, Victoria residents consider road improvements more critical than public transport improvements (30% vs. 29%). Queensland residents also consider road improvements more important than public transport improvements (23% vs. 22%).
- Australians in other states and territories consider road and public transport improvements equally important (24%).
- Many have specifically mentioned the public transport service quality, cancellation and delay of train and bus services and other reasons. The main problems regarding road improvement are related to congestion and poor road surface conditions.

- Economic and financial issues are among the top three highest priority in all states and territories except Western Australia. Many have mentioned the soaring costs of petrol. The three most important priorities are public transport improvements, road improvements and economic/financial issues. Australians have more focused priority choices for transport currently.

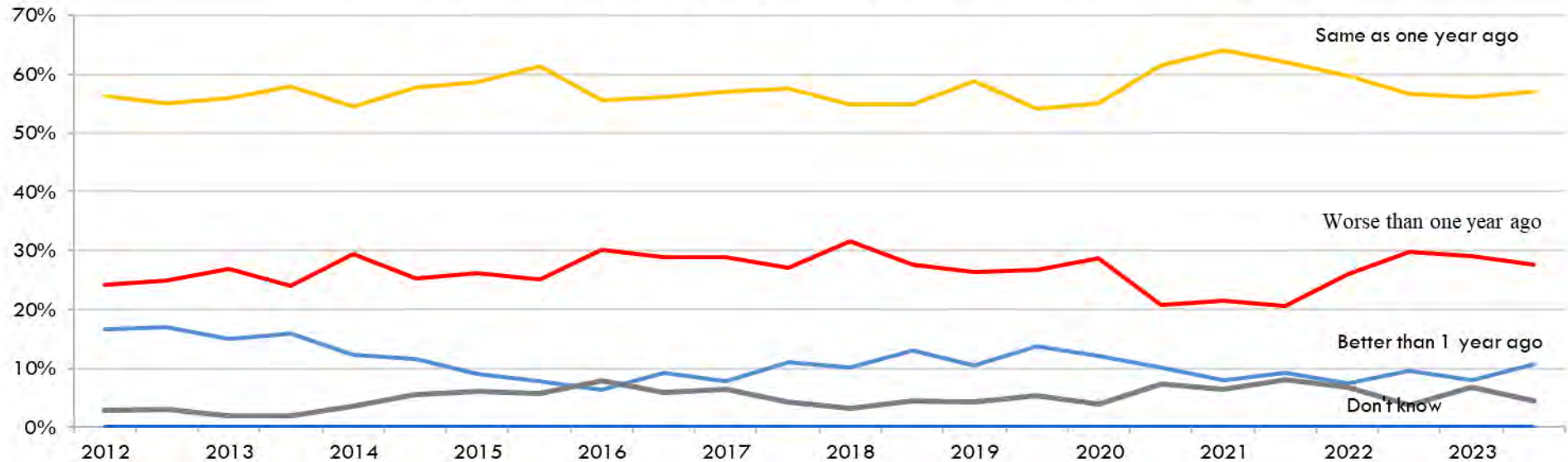


Local transport differs across states and territories

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

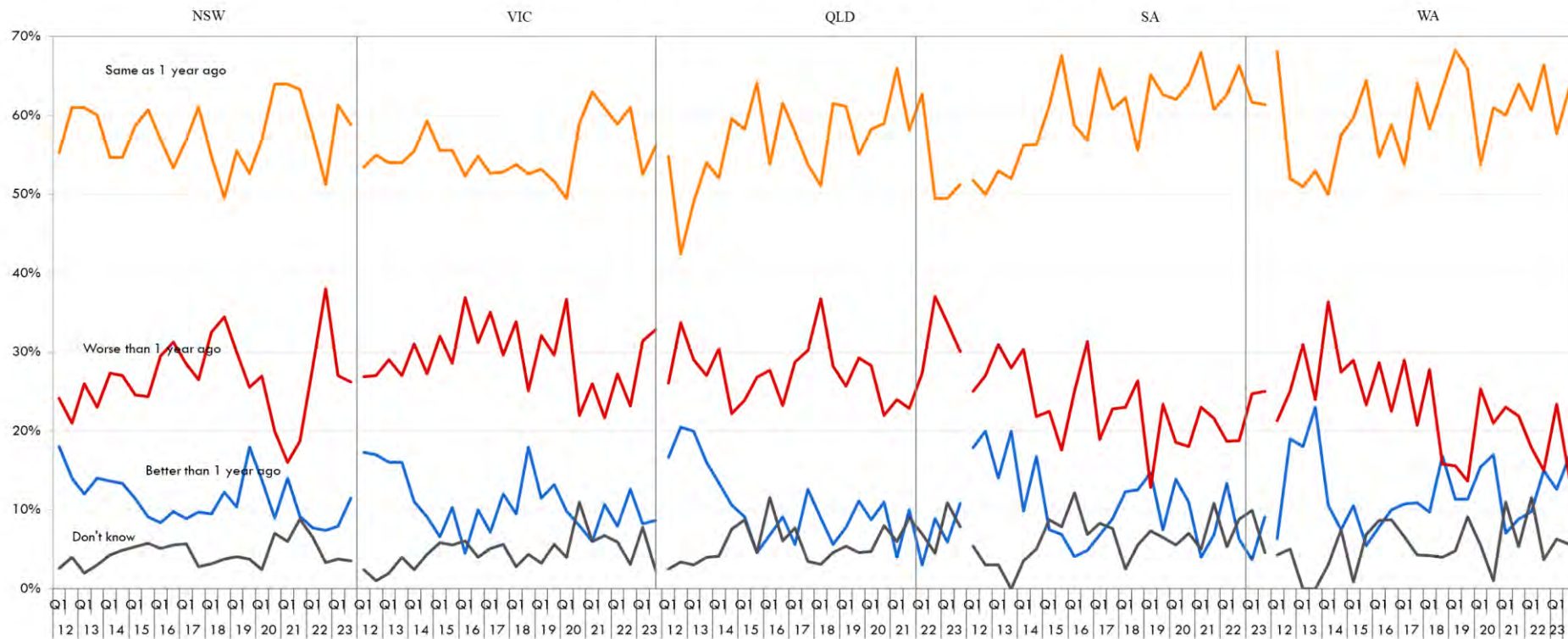
- In September 2023, 28% of Australians believed that transport in their local area was worse than one year ago (down from 29% in March 2023). About 57% of Australians said it is the same as one year ago (up from 56% in March 2023), and 11% said it is better now than one year ago (up from 8% in March 2023). Those who gave no opinions decreased from 7% in March 2023 to 5%, showing that Australians had less certainty in their views on this issue.

Transport in local area compared to 1 year ago across Australia, 2012 March - 2023 September



- Respondents' evaluation of transport in the local area is consistent across states of Australia, seeing an increased proportion of people thinking the transport in the local area is better than one year ago in all states and territories. In VIC, 65% of respondents believe the state of transport is better or the same, higher than 61% in March 2023. In WA, the same number is 80%, a 10% increase from 70% in March 2023. A similar rise in the combined positive and neutral opinions was also observed in QLD and SA, with a 5% or 6% increase from their levels in March 2023. NSW is the only state with a similar level of combined positive and neutral views at 70%, the same as the number in March 2023 but with an increased positive option (11% vs 8% in March 2023).

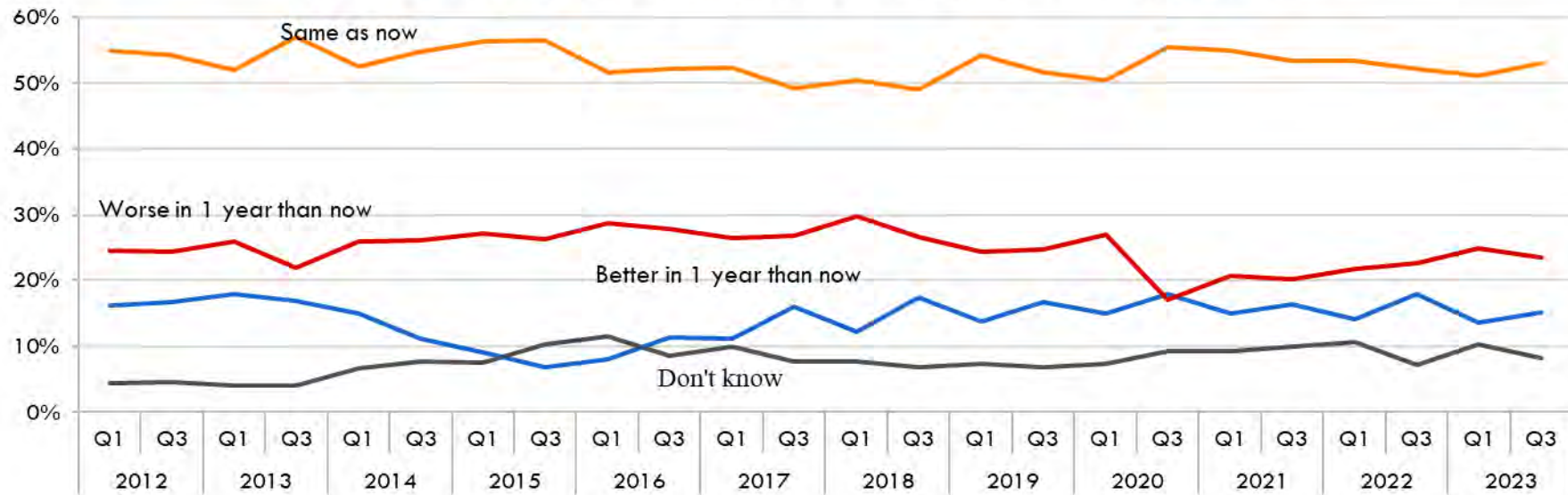
Transport in local area compared to 1 year ago by state, 2012 March - 2023 September



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

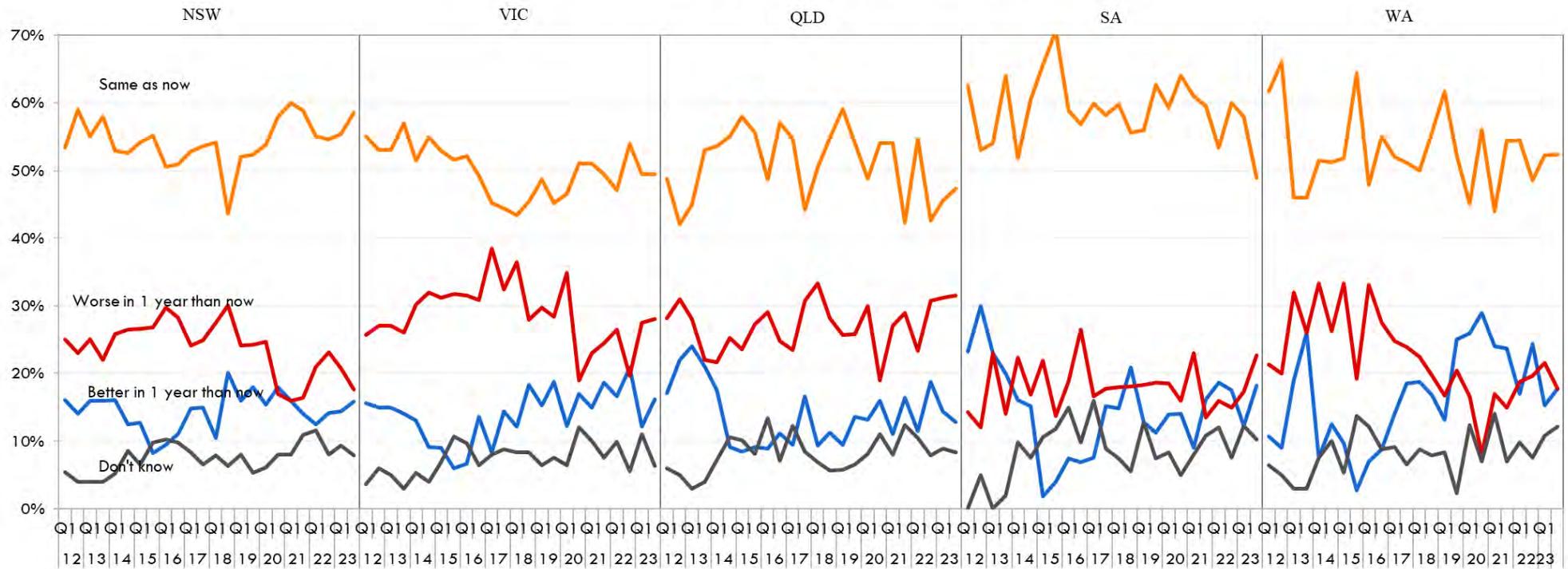
- In September 2023, 53% of Australians said that transport in their local area would be the same in one year. 15% said transport would be better, up from 14% in March 2023, while 24% said transport would be worse, down from 25% in March 2023. About 8% of Australians did not offer their views on this question, down from 10% in March 2023.

Transport in local area in 1 year time across Australia, 2012 March - 2023 September



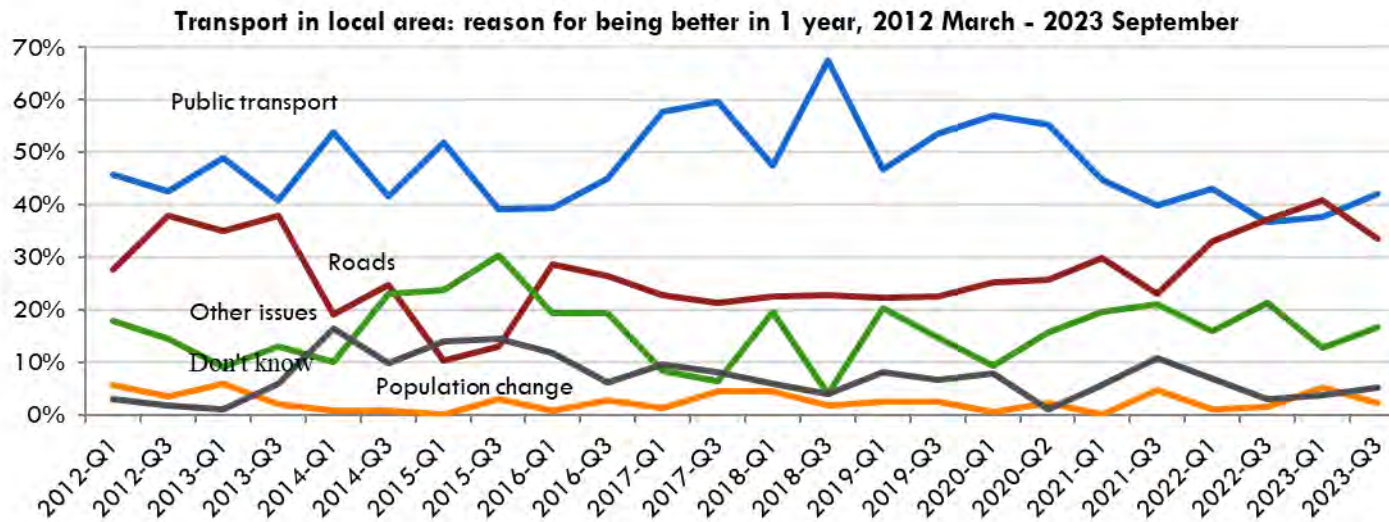
- Australians have responded with more confidence to transport in their local area in most states in one year's time, with some states showing a bigger confidence level increase than others. NSW residents who chose "worse" decreased from 21% in March 2023 to 18% in September 2023. VIC residents had shown more confidence, shown by those who chose "better", increased from 12% in March 2023 to 16%. QLD is the only state with almost no change from March 2023 with no or 1% change on those who chose "better", "same" or "worse". Compared to the March 2023 survey figures, more people chose "better" in SA (18%, up from 12%) but also more people chose "worse" in SA (23%, up from 17%). It is the group who chose the "same" reduced from 58% to 49% in SA. WA residents showed an increase in confidence, with 18% choosing "better in one year's time", up from 15% in March 2023.

Transport in local area in 1 year time by state, 2012 March - 2023 September

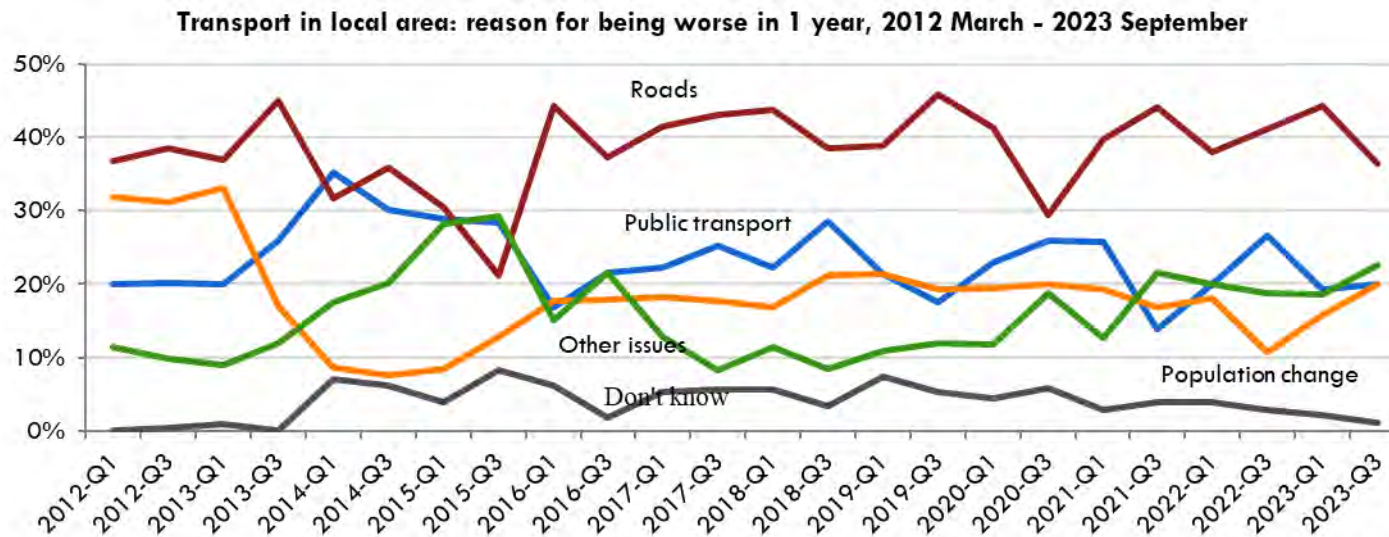


What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- The main reasons Australians believe that transport will improve or worsen in the local areas are public transport and road improvements. Public transport service and roads are the main reasons residents think their local transport will improve at 42% and 34% in one year, respectively. Roads are the most prominent reason residents believe that their local transport will worsen in one year's time at 36%, down from 44% in March 2023. People mentioned congestion, poor road conditions, trucks on roads and road safety issues as the main reasons they believed that transport in local areas would worsen in one year. Other issues such as cost of living and fuel price are the third reason people thought their local transport would be worse. Public transport and population change are equally important at 20% among those who believe that transport will worsen in local areas in one year.



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



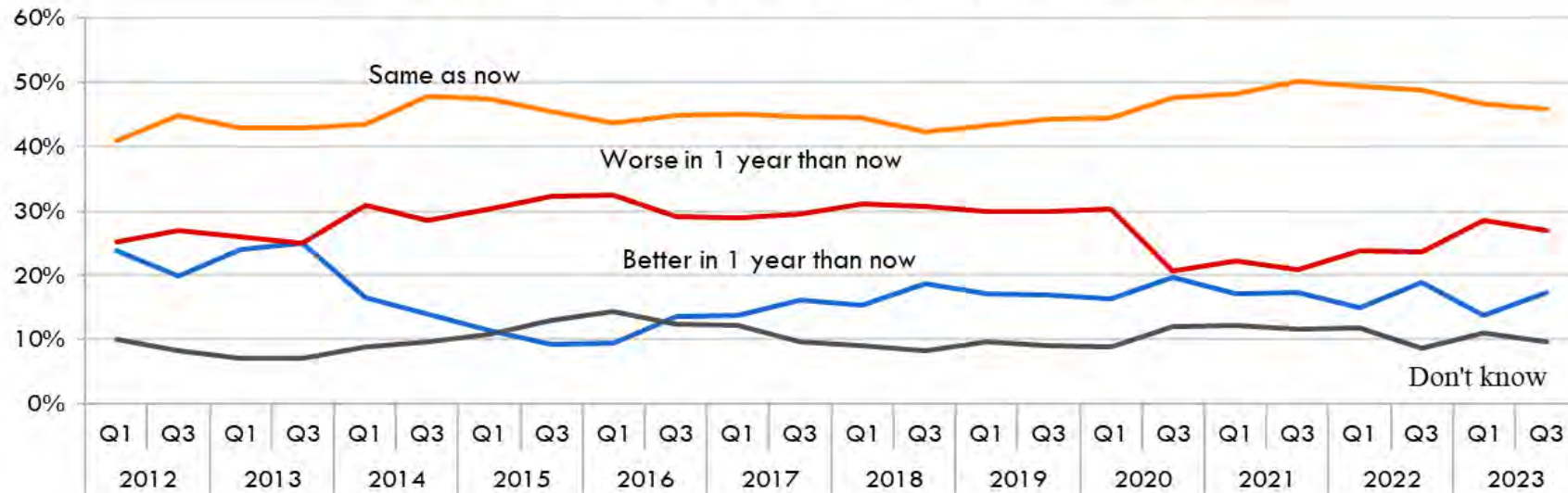
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

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

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

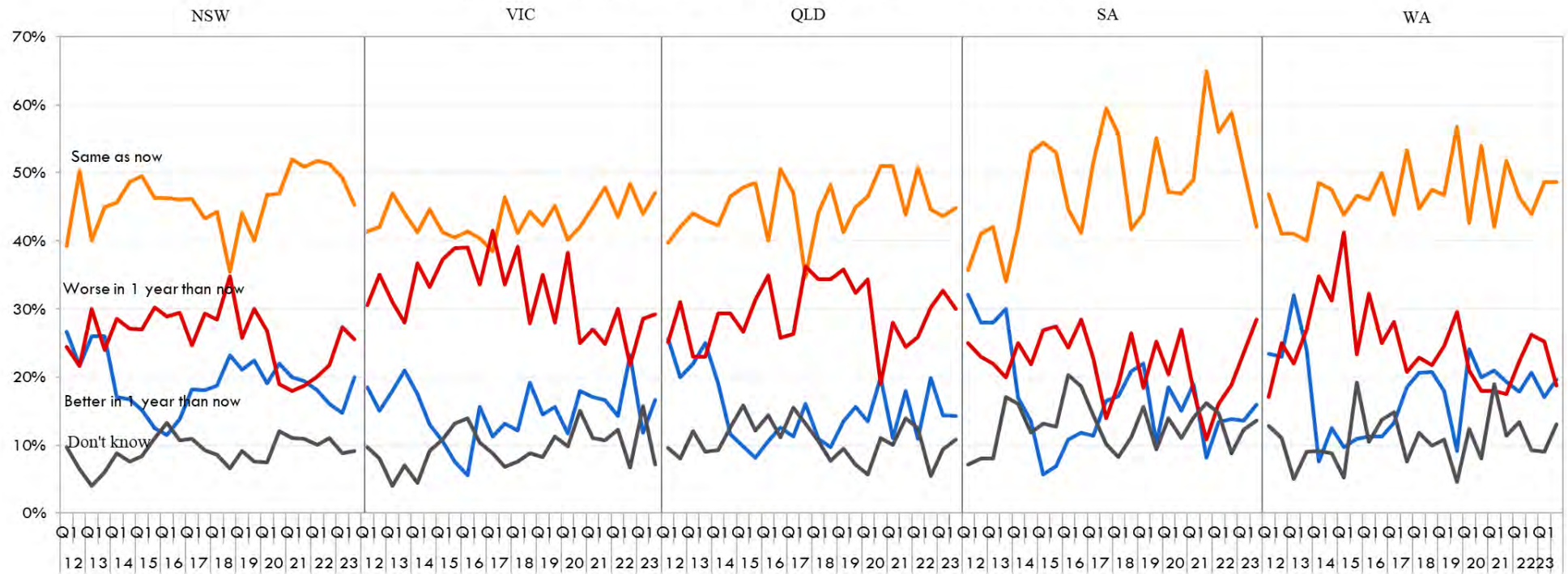
- In September 2023, 46% of Australians said that the state of transport in Australia in one year will be the same as now, with 17% of Australians saying that transport in Australia will be better in one year, up from 14% in March 2023. In contrast, 27% of Australians said that the state of transport in Australia in one year would get worse, down from 29% in March 2023.

Transport in Australia in 1 year, 2012 March - 2023 September



- In September 2023, about 26% of NSW residents said that the transport in Australia would worsen in one year, down from 27% in March 2023. In contrast, about 20% of NSW residents chose "better", up from 15% in March 2023. Similarly, 17% of VIC residents noted that the state of transport in Australia would be better in one year, up from 12% in March 2023. Minor differences and no significant increase in confidence were observed among QLD residents. About 28% of SA residents said that the state of transport in Australia would worsen in one year, up from 24% in March 2023. However, there were also 16% of SA residents said that the state of transport in Australia would be better in one year, up from 14% in March 2023. In WA, there has been a decrease in those who believed the state of transport in Australia would worsen in one year, down from 25% to 19% in September 2023. There has been an increase in those who believed the opposite, up from 17% to 20% in September 2023. Overall, Australians have more confidence across states about the state of transport in one year's time.

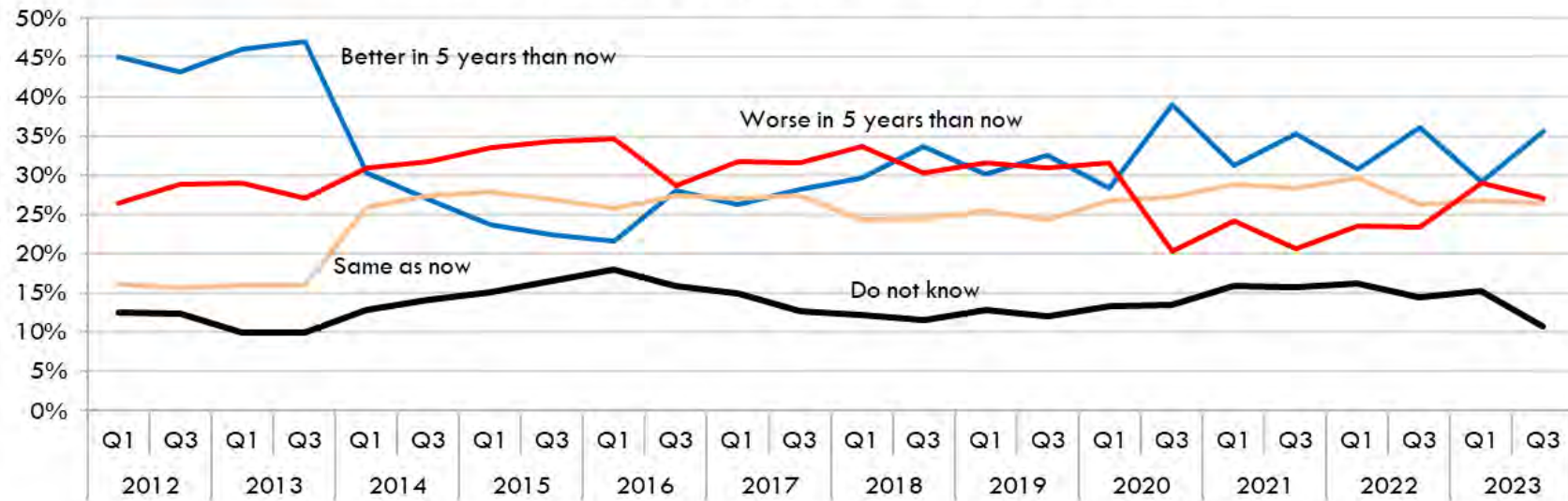
Transport in Australia in 1 year time by state, 2012 March - 2023 September



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

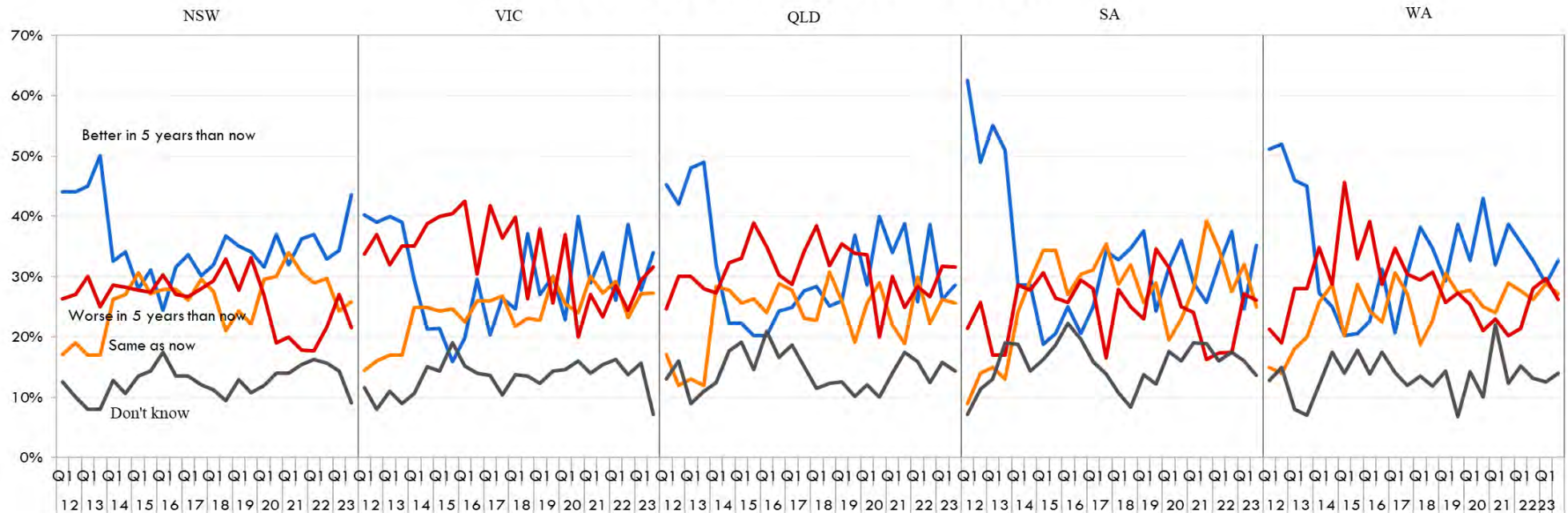
- Australians are less confident that the state of transport will be better in five years than it is now. In September 2023, 36% of Australian residents believed transport in Australia would improve in five years, up from 29% in March 2023. People who think the state of transport in Australia will worsen in five years is at 27%, down from 29% in March 2023.

Transport in Australia in 5 years, 2012 March - 2023 September



- Australians across all states are gaining long-term confidence about transport (or re-gaining long-term confidence as shown in September 2022), especially in NSW and SA with more significant increases, followed by VIC, QLD and WA with relatively more minor increases. In September 2023, the proportions of Australian residents who believe Australia's transport will be better in five years have all increased, with a 10% increase in NSW (34% to 44%), a 6% increase in VIC (28% to 34%), a 3% decrease in QLD (26% to 29%), a 10% in SA (25% to 35%), and a 4% increase in WA (29% to 33%). The proportions of Australian residents who believe Australia's transport will be worse in five years are not consistent in all states, with a 6% decrease in NSW (27% to 21%), a 3% increase in VIC (29% to 32%), no increase or decrease in QLD (at 32%), a 1% decrease in SA (27% to 26%), and a 4% decrease in WA (30% to 26%). Australians have an overall higher long-term confidence about transport in five years.

Transport in Australia in 5 years by state, 2012 March - 2023 September



Change in confidence over time – TOPS Index

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

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

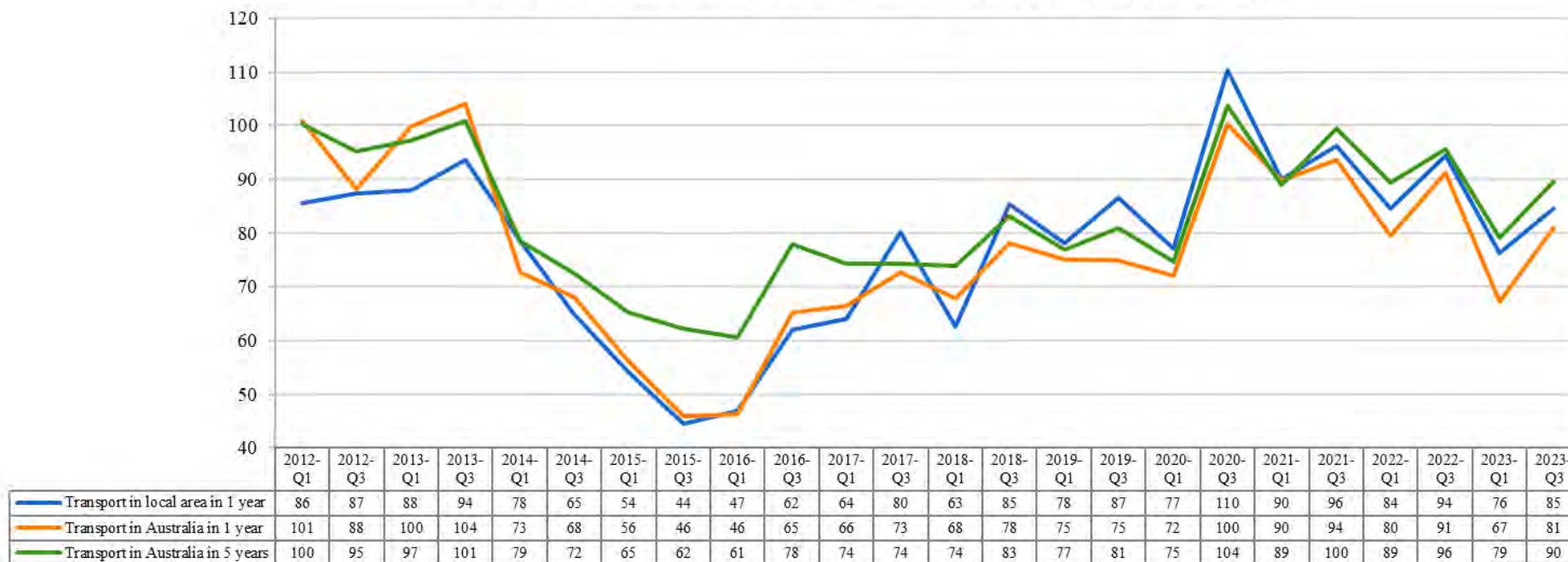
The TOPS Index shows that in the September 2023 quarter, as compared to March 2023:

- Australians have become more confident about improvements in transport in their local area in one year's time.
- Australians have become more confident about Australia's transport improvements in one year's time.
- Australians have become more confident about Australia's transport improvements in five years' time.

We cannot underestimate the significant impact of factors, including the housing crisis, high inflation and the soaring cost of living, on people's overall confidence, including their confidence in transport. Compared to the launch of TOPS in March 2010, Australians are less confident about improvements in transport in their local area in September 2023 (Confidence index: from 100 to 85) and in Australia in the next year (Confidence index: from 100 to 81) and are less confident about

improvements in transport in Australia in five years' time (Confidence index: from 100 to 90). There has been a significant decline in confidence since a year ago (September 2022), showing Australians are less confident about future enhancements in transport in 2023, given all the difficulties that Australians have encountered since the beginning of 2023. Although people have overcome many challenges in the past year and recovered some confidence since March, they are still under the impact of the housing crisis, the soaring cost of living and petrol prices, and transport services and infrastructure issues. The consequences of some of these events, such as the housing crisis and increased cost of living, will continue to impact transport. We will see whether there will be a continuous recovery of confidence in the March 2024 survey.

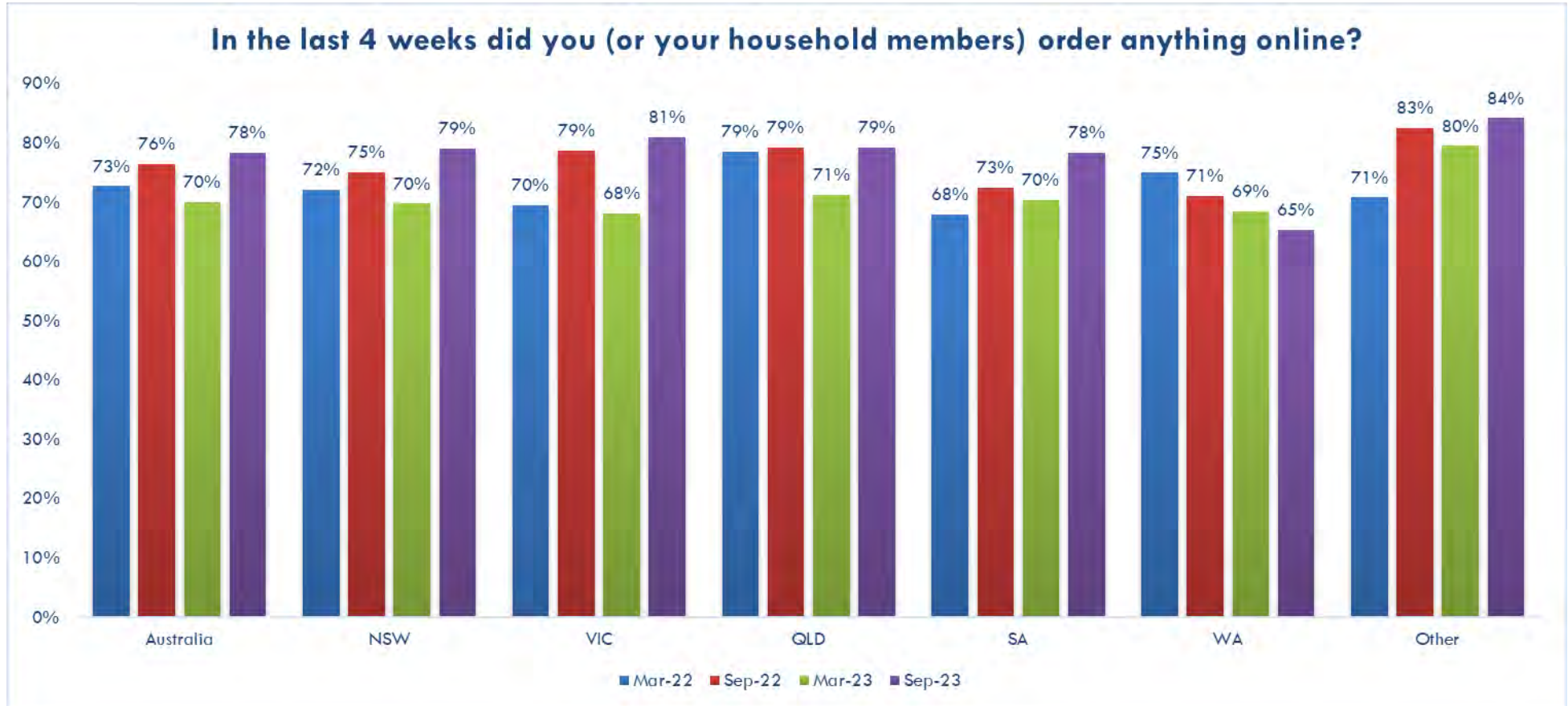
ITLS TOPS Index of Transport Confidence - March 2012 to September 2023



Supplementary questions in September 2023

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

— More Australians shop online compared to March 2023 with 78% of Australians still shopped online over the last four weeks.

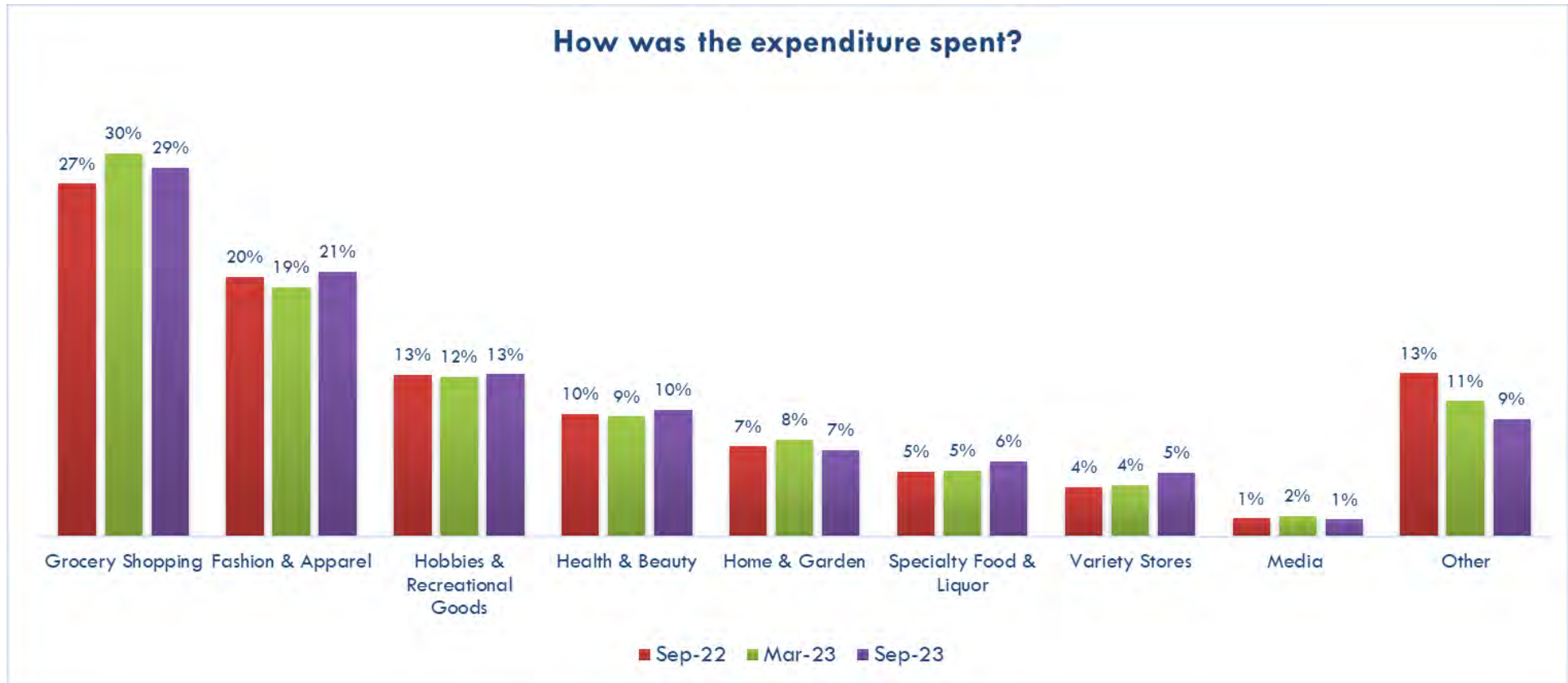


The graph below shows that online shoppers in Australia spent about \$395 on average in the last four weeks, more than \$370 in March 2023. Online shoppers in NSW and VIC spent the highest amounts, averaging \$434 and \$409 in four weeks. In QLD and SA, the average amounts are \$371 and \$373. In WA and other states and territories, the average amounts are the second lowest and the lowest at \$330 and \$299, respectively.



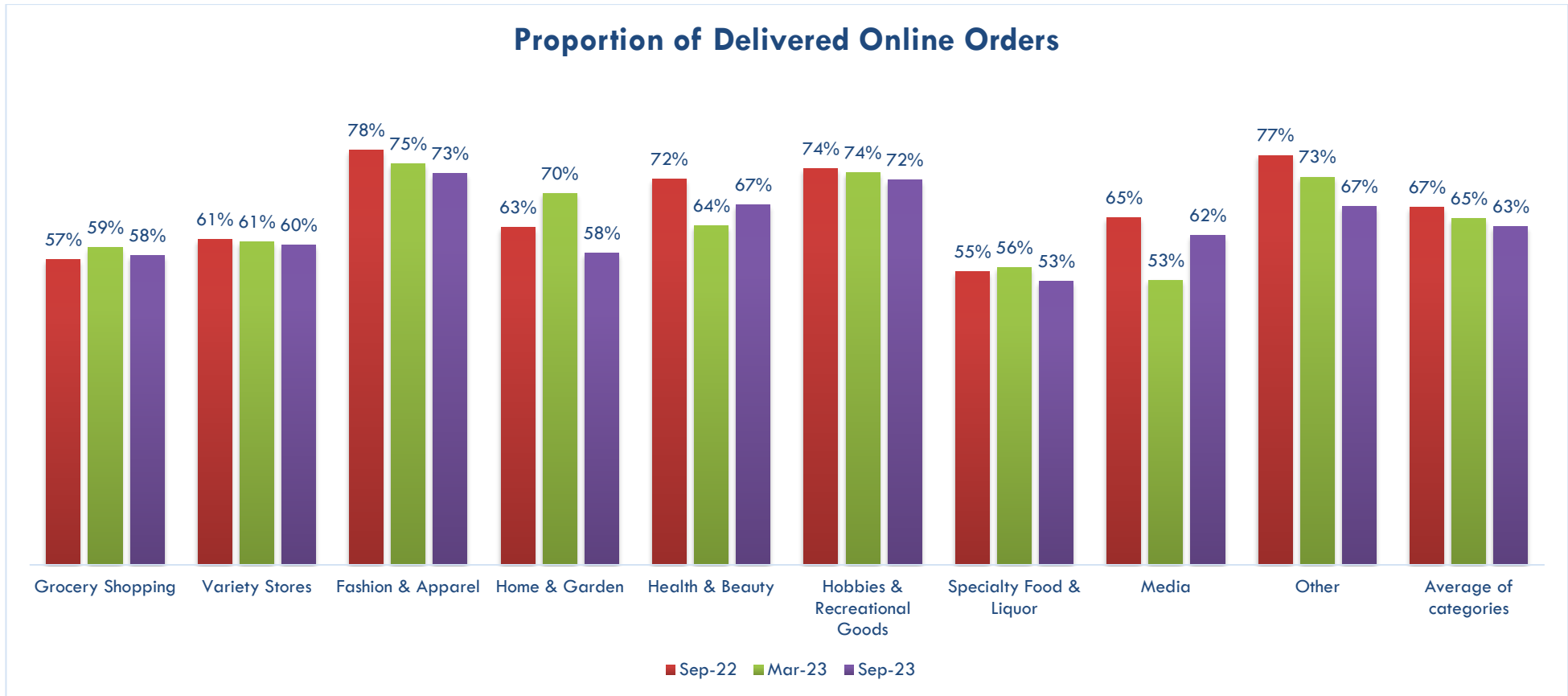
As shown in the graph below, of all the categories Australians purchased online, grocery shopping is the largest online shopping category, accounting for 29% of the total online spending, which decreased slightly from 30% in March 2023. Fashion/apparel ranks second in total online spending, contributing 21% of online spending, up from 19% in March 2023. These two categories are followed by spending online on hobbies and recreational goods (13%), health and beauty products (10%) and home and garden products (7%). Together, these five categories account for 79% of the total online spending, almost identical to the September 2022 and March 2023 levels.

How was the expenditure spent?

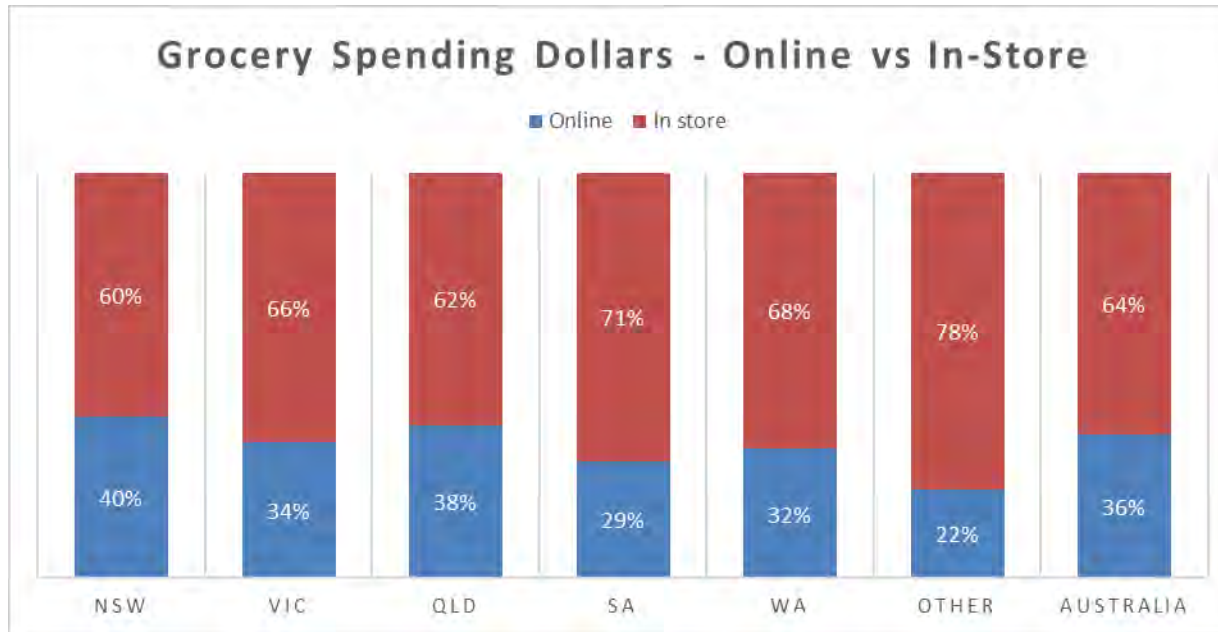


Due to the distribution channels and products ordered, online shoppers have different delivery needs across categories. For example, retailers are more likely to have physical stores and outlets for grocery goods, specialty food and liquors, variety stores and home and garden products. Shoppers ordered and collected around 40% to 47% of the purchased goods, and 50% to 58% in these four categories were delivered. For other categories, such as fashion and apparel, health and beauty products, and hobbies and recreational products, online shoppers are more likely to order from online vendors who do not have a local store outlet or warehouse. The proportion of home delivery is around 70% or more. Besides, some goods, such as clothing and cosmetics, are probably easier for home delivery due to weight or other factors than grocery categories.

Proportion of Delivered Online Orders



As the biggest online shopping category (29% of the total online spending), online grocery shopping also accounts for 36% of the total grocery spending for online shoppers, increasing from 33% in March 2023. About 64% of total grocery spending is in-store shopping. There are some differences across different states, as shown in the graph below. Online shoppers in every state spent 22% to 40% of total grocery expenditures online, with NSW as the highest at 40% (an increase from 36% in March 2023).



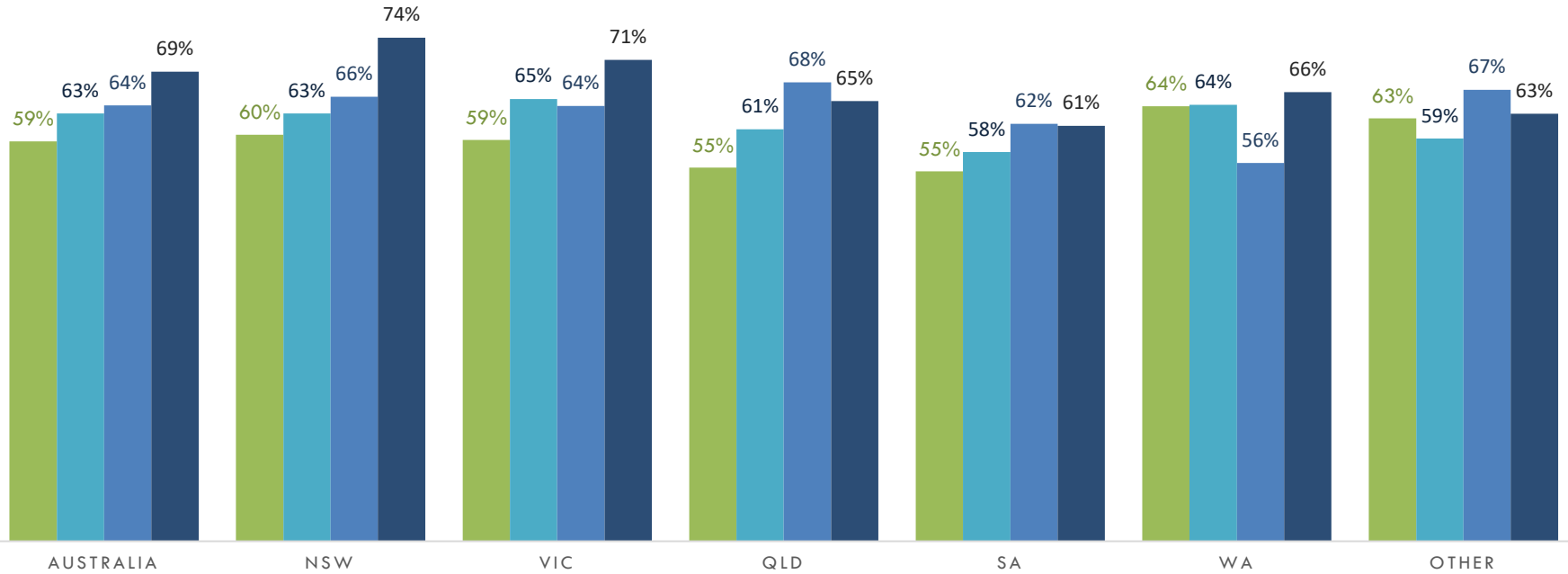
Working from home

We asked respondents how many days they did paid work in the last two weeks. Given the fluctuating working hours for different employment arrangements such as part-time, casual, contract, and multiple jobs, we used two weeks for flexibility.

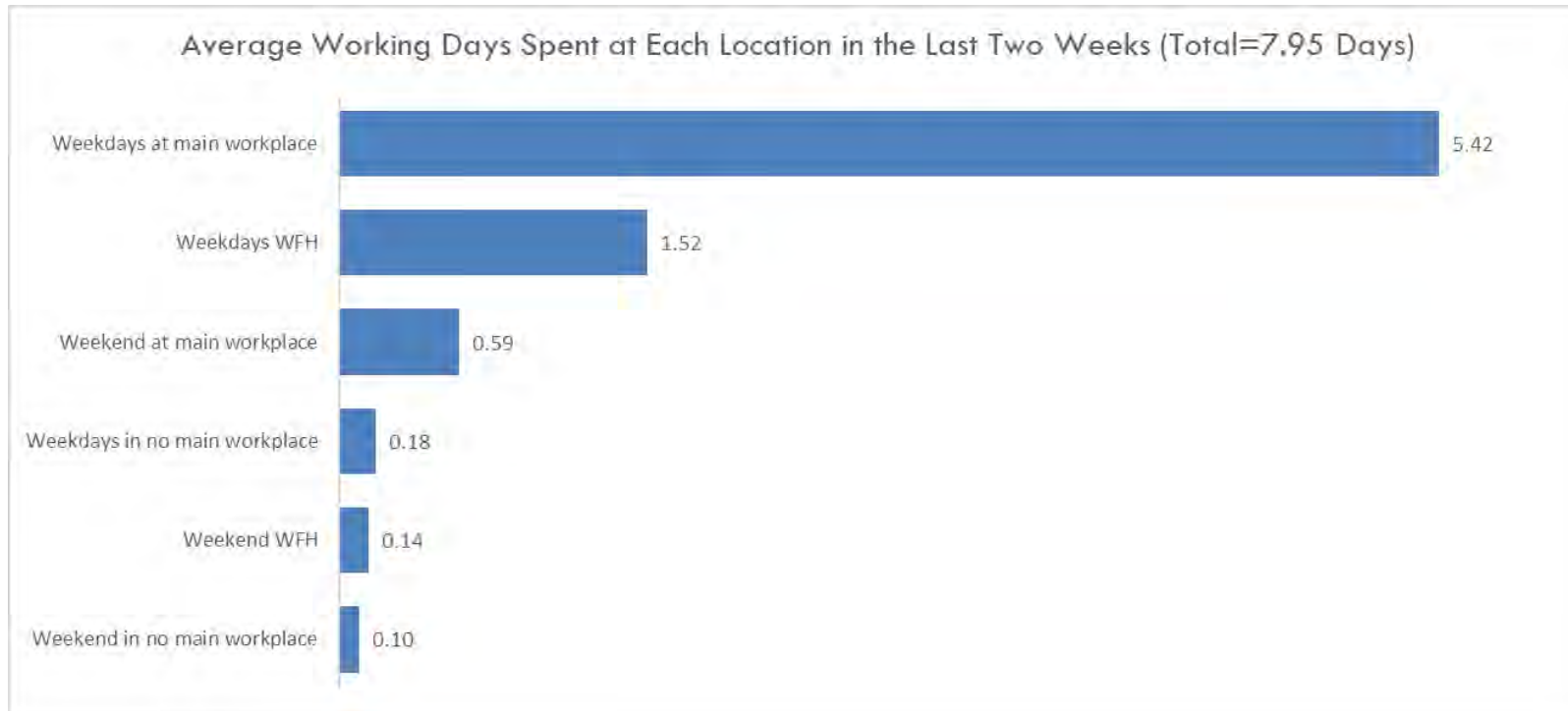
As shown in the graph below, compared to the result for this question for March 2023 at 64%, a higher proportion of Australians, 69%, have undertaken paid work during the last two weeks, with the two largest states of NSW and VIC topping the list at 74% and 71%, respectively. More Australians were not working in March 2023 compared to September 2023, such as students, those looking for work, people with home duties and retired people who are doing more work in September 2023. This increase in the working population suggests more people are undertaking work (perhaps even second or third jobs) in order to obtain extra income to cope with the increasing cost of living, and as well there are more opportunities with an increasing number of businesses now attracting face to face contact such as restaurants. The increase in the total working population appears to reduce the average working days because the positions offering extra work are more likely casual. The finding shows the average working days in the last two weeks having dropped from 8.08 days in March 2023 to 7.95 days in September 2023.

Percentage of Australians who did paid work in the last 2 weeks

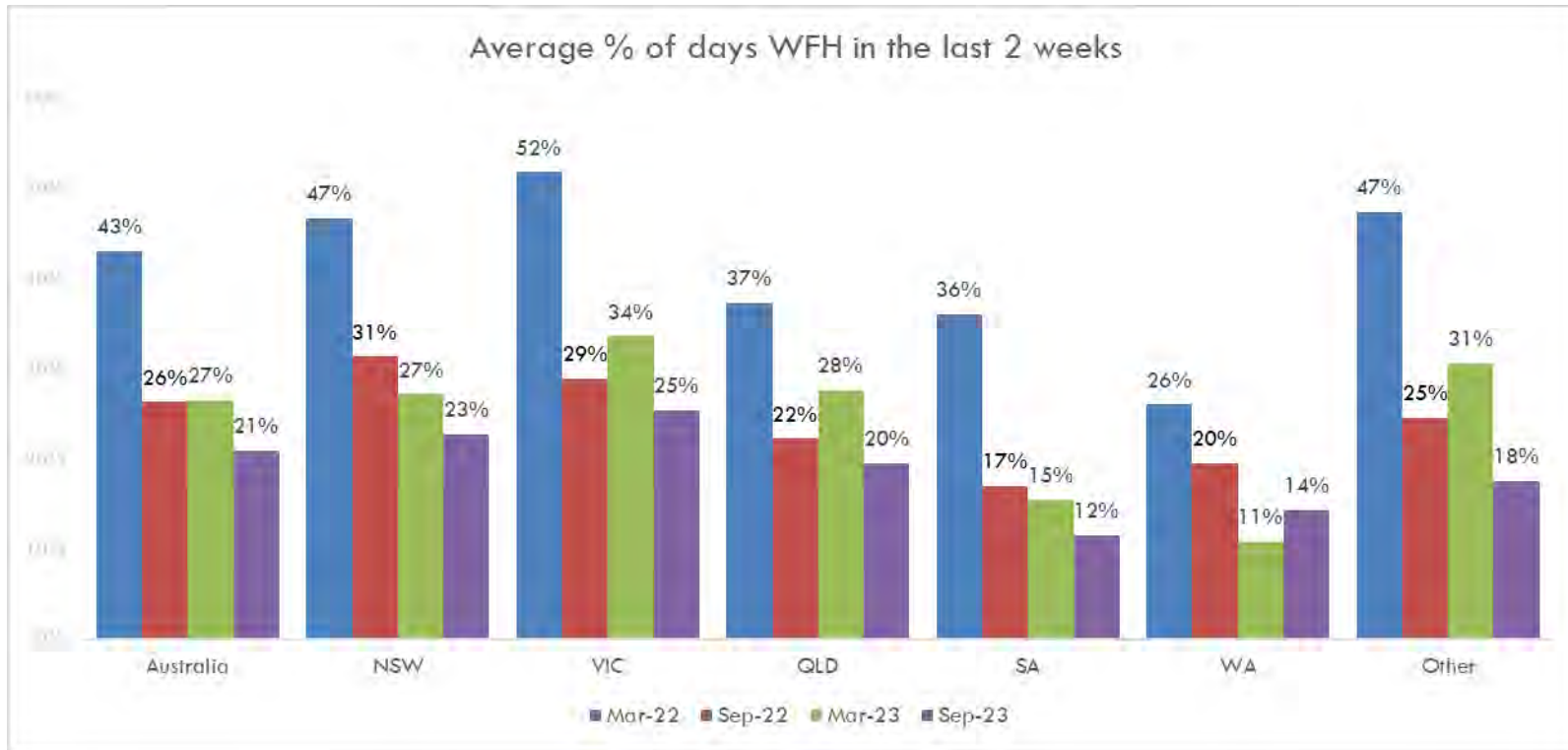
■ Mar-22 ■ Sep-22 ■ Mar-23 ■ Sep-23

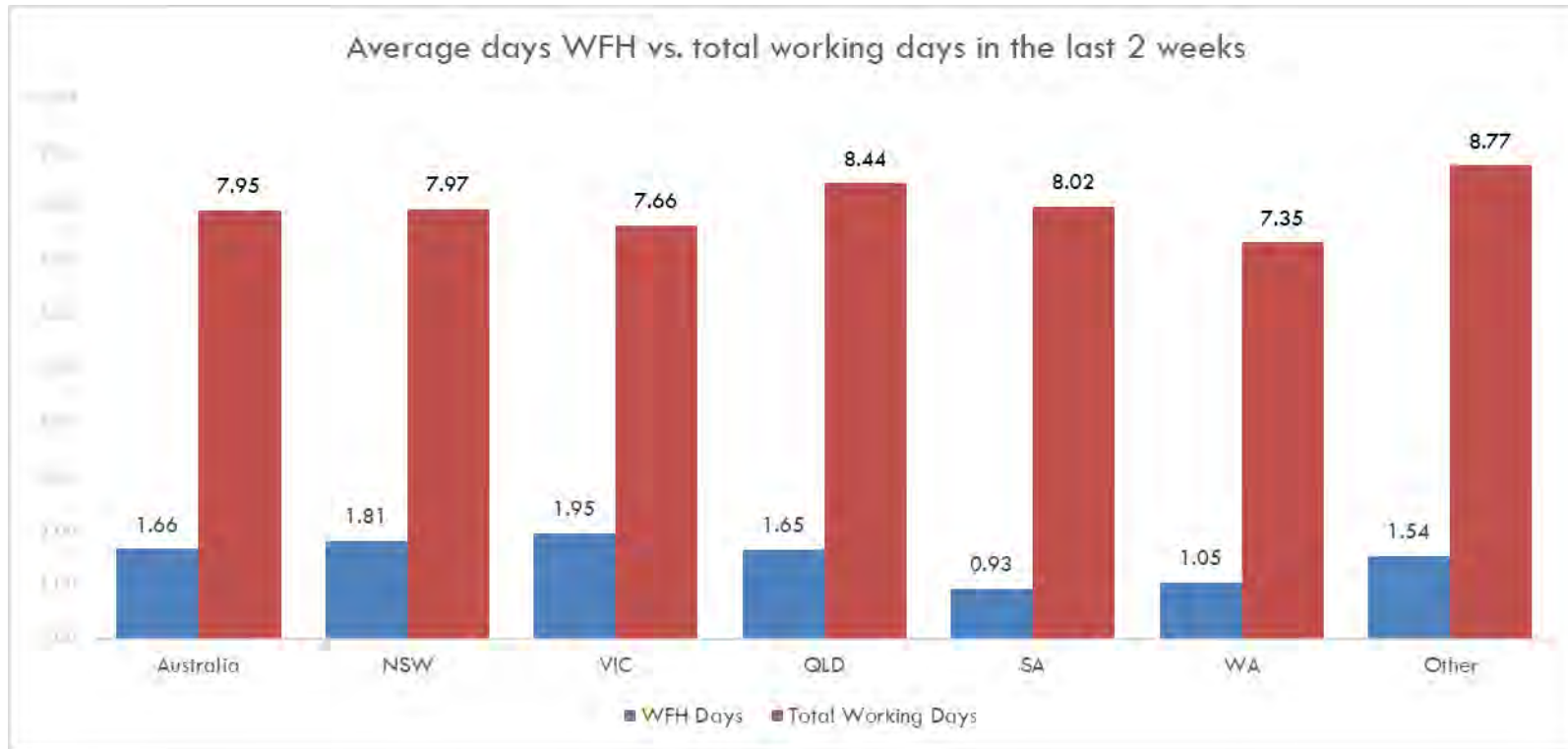


Of the 7.95 days of paid work during the last two weeks, 21% of the days are attributed to working from home (WFH), including weekdays and weekends. This level is lower than the 27% in March 2023. People spent most of their working hours at the main workplace, with 68% and 7% recorded for weekdays and weekends, respectively. People undertook about 3.5% of working hours outside the main workplace and home, combining weekdays and weekends at an alternative workplace such as a satellite office, cafe, or library close to home, higher than the 2% recorded in March 2023. This finding raises an important question about the future of satellite offices and working near home (WNH).

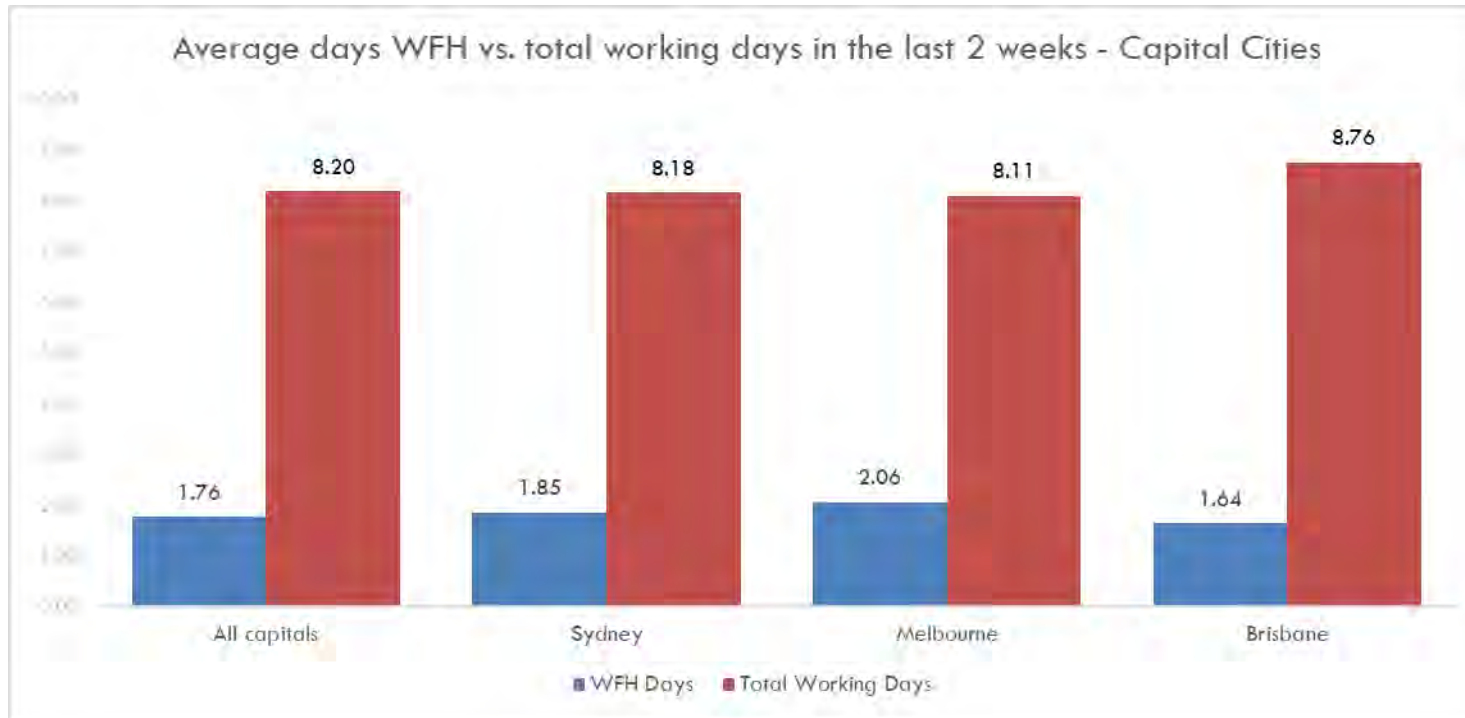


The two graphs below show the total working days and WFH days in the last two weeks in each state and territory as a proportion and as a number of days. Among the average of 7.95 working days in the previous two weeks, working Australians spent 1.66 days (or 21%) working from home (WFH) (or 0.83 days per week), down from 2.14 days (or 27%) in March 2023. VIC has the highest proportion of WFH at 1.95 days (or 25%), followed by NSW at 1.81 days (or 23%) and QLD at 1.65 days (or 20%). Other states and territories have WFH levels below 20%.



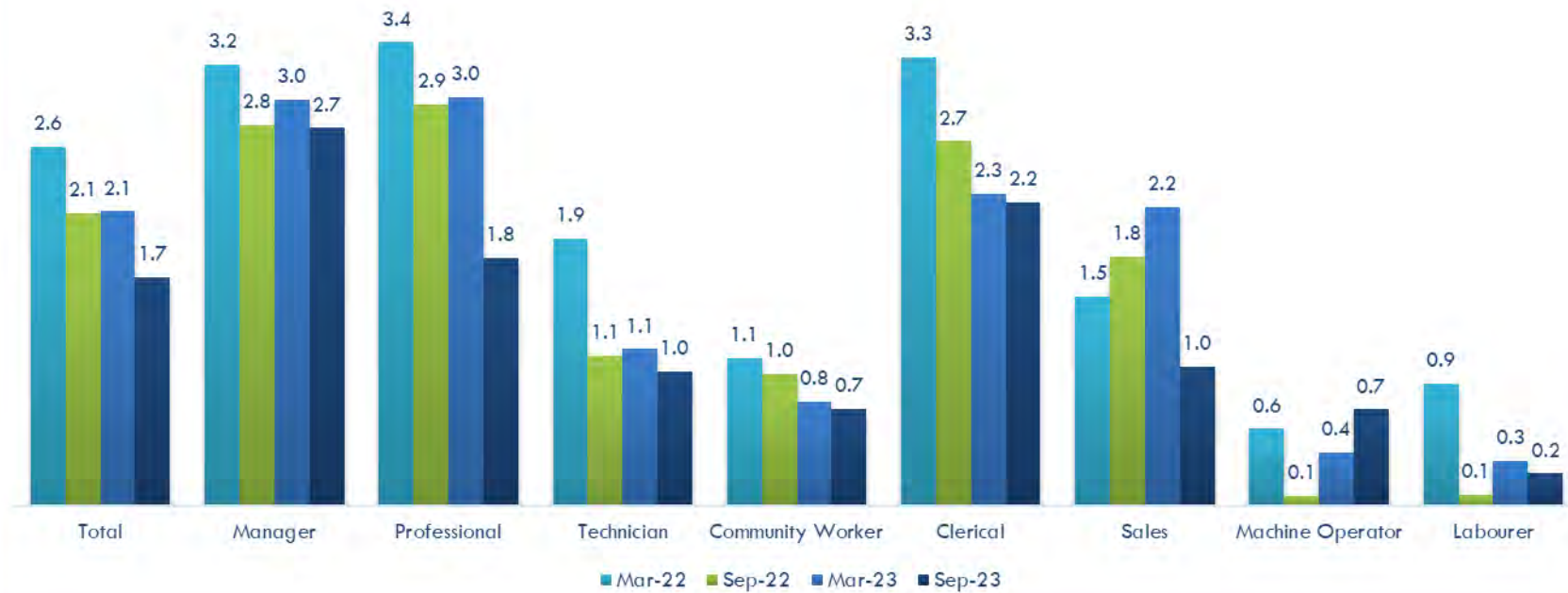


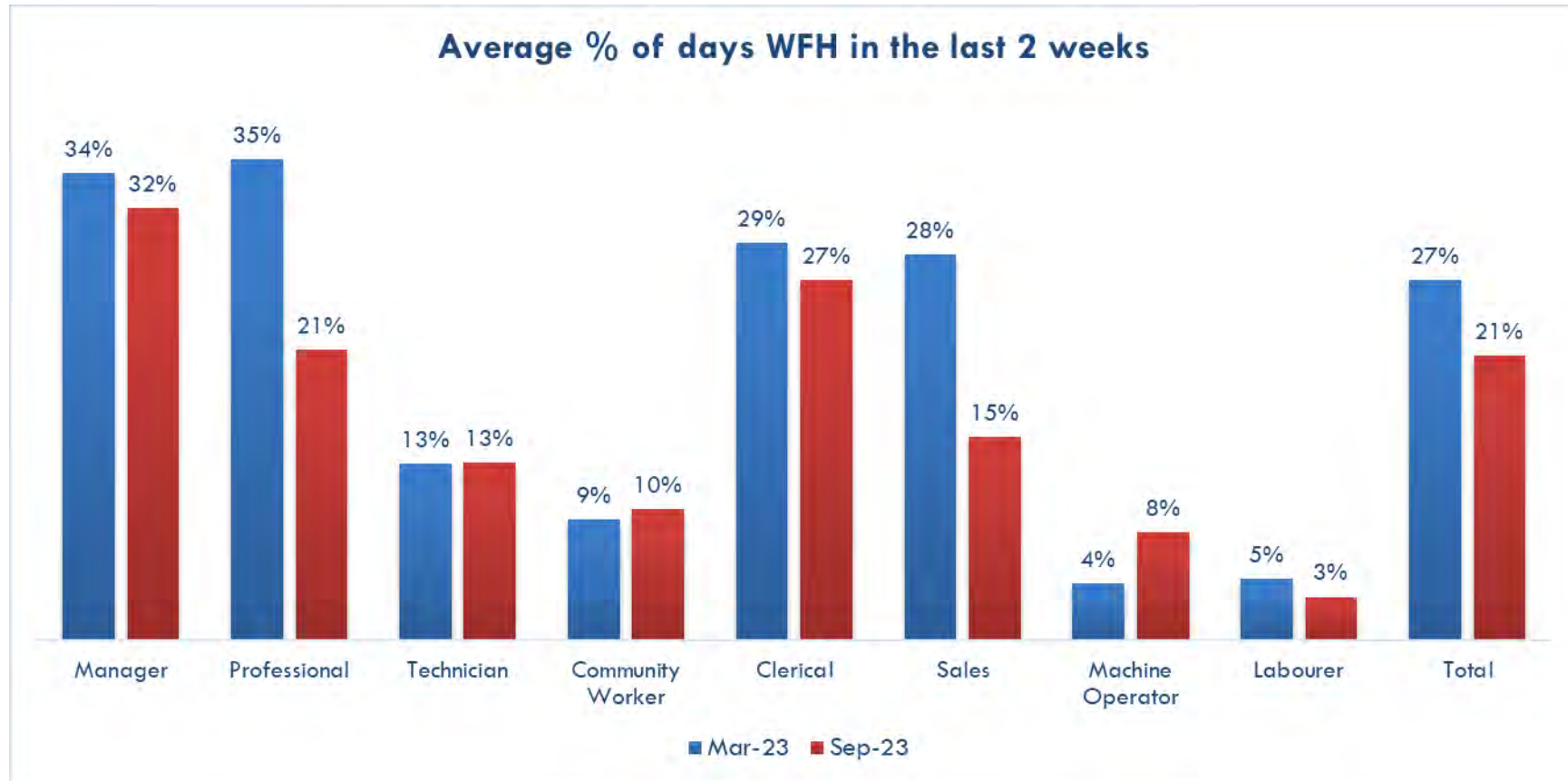
Among the capital cities of Sydney, Melbourne and Brisbane, where the survey has a larger and more representative sample base, workers in Melbourne work from home more than workers in other cities, with 2.06 days in the last two weeks. This number exceeds the state average of 1.76 days for all capitals. Workers in Sydney and Brisbane spent an average of 1.85 and 1.64 days working from home, respectively. Compared to the results in March 2023, the number of WFH days has reduced in all capital cities. In March 2023, the average WFH days were 2.36 for all capitals, 2.90 days for Melbourne, 2.62 days for Sydney and 2.58 days for Brisbane.



A notable explanation of the overall reduction in WFH days can be identified by occupation. Comparing the results for March 2023, we found the biggest decrease in WFH days is related to two occupations: professionals and sales workers. Professionals, on average, work from home 1.2 days less in the last two weeks, down from 3 days to 1.8 days. Sales workers work from home even less, down from 2.2 days to 1 day, due we suggest by the increased opportunities in the market for selling activities. The reduction of WFH days is a lot less for other occupations. For example, in the last two weeks, managers worked from home 0.3 days less, and technicians, clerical workers and community workers all worked from home 0.1 days less. Since professionals and sales workers account for over 37% of the total working population, their WFH levels significantly impact the overall reduction of WFH levels.

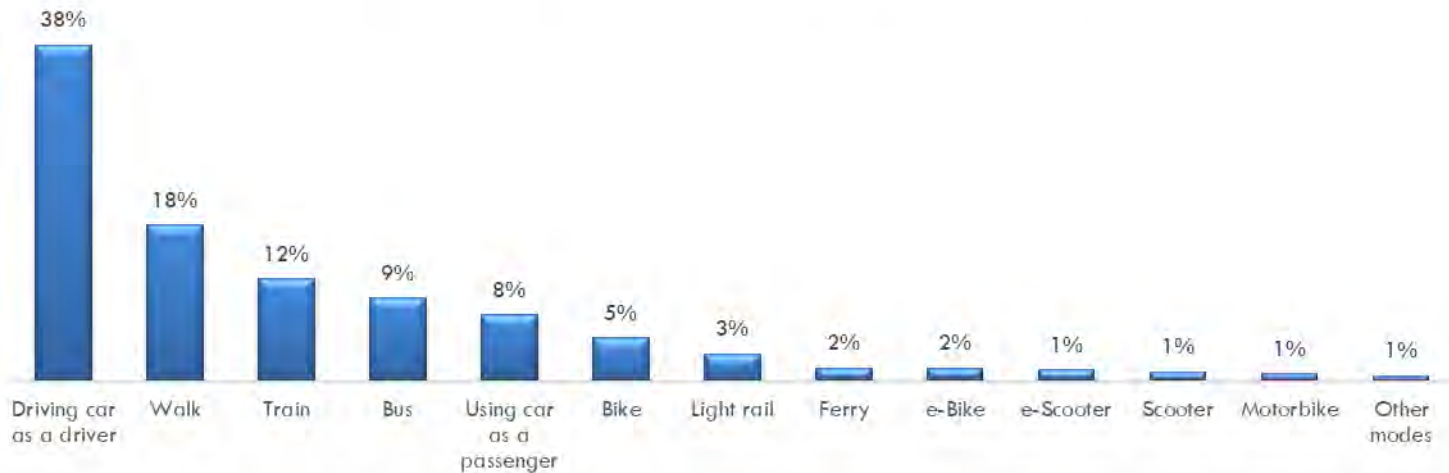
Average days WFH in the last 2 weeks by occupation

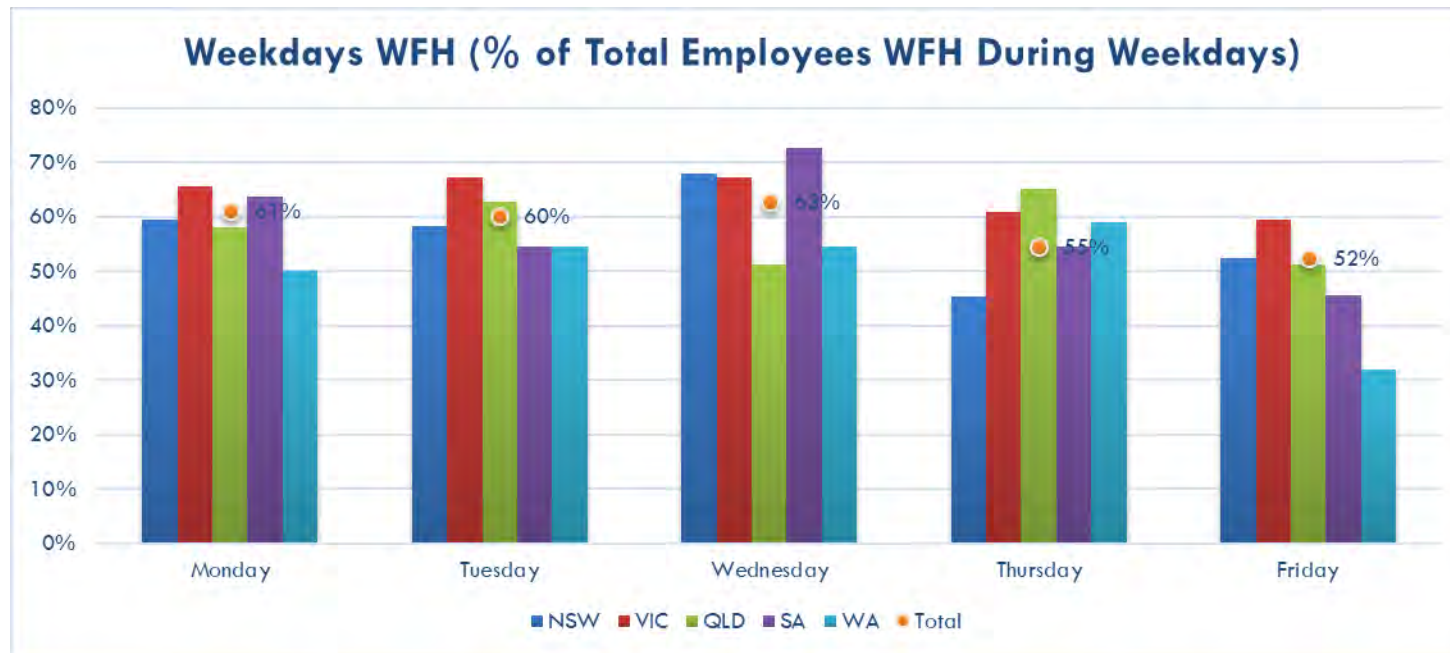




About 94.7% of people who work from home have made some non-commuting trips during WFH days. Driving, walking and taking trains are the three top transport modes. As shown in the following charts, we asked those who work from home the question: "On the days you worked from home in the last two weeks, which transport modes did you take for other purposes such as leisure, shopping, or other personal businesses?" The graph below shows that most used cars, with 38% as drivers and 8% as passengers. These are followed by walking (18%), taking a train (12%), taking a bus (9%), cycling (5%) and taking light rail (3%). Other modes have a low usage with 2% or below shares. What we have not identified is how many of these trips are additional to what they would be taking if they went to the office as often as in the pre-COVID period. We hypothesise that there has been an increase in car use in the local area.

Transport Mode Shares on WFH Days 88% of WFH People Travel on WFH Days





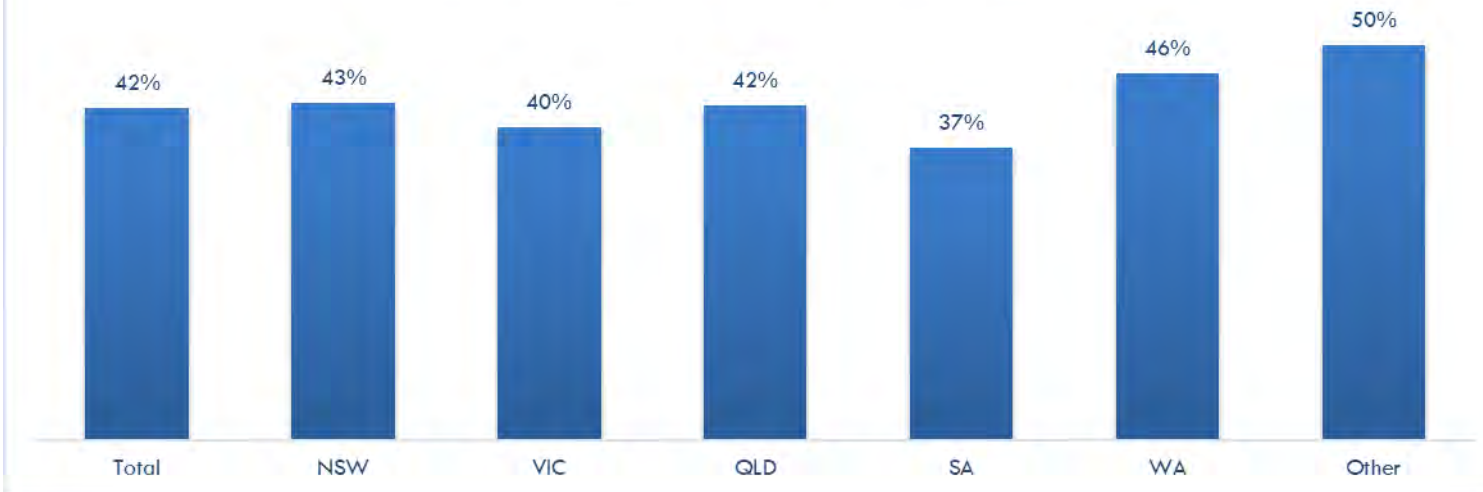
We asked a new multiple-response question on which weekdays and weekend days WFH people worked from home in the last two weeks. On average, WFH occurred most often on Wednesday (63%), followed by Monday (61%) and Tuesday (60%). Surprisingly, the WFH people worked less from home on Thursdays and Fridays, with 55% for Thursday and 52% for Friday. There are differences in these characteristics across different states.

With the three states of NSW, VIC and QLD having a larger sample, QLD is the only state with a very different WFH pattern, with WFH people working from home most often on Thursday (65%) and Tuesday (63%), followed by Monday (58%), Friday (51%) and Wednesday (51%). NSW and VIC are slightly different regarding WFH days but generally consistent with the total sample. In NSW, the order of WFH weekdays are Wednesday (68%), Monday (60%), Tuesday (58%), Friday (52%) and Thursday (45%). In VIC, the order of WFH weekdays are Wednesday (67%), Tuesday (67%), Monday (66%), Thursday (61%) and Friday (59%).

For those who worked from home during the weekend days, 90% of them worked on Saturday, and 47% worked on Sunday.

We also asked a new questions to all respondents who worked in the last two weeks on whether their employer stipulated whether they must return to the office a particular number of days each week. About 42% of workers answered "yes". If the employers stipulate the number of days or days employees must return to the office, employees may feel more reluctant to choose working from home.

Employer stipulated that workers must return to the office a particular number of days each week?



Timing of TOPS

The fieldwork was conducted on the following dates:

- March 2010: 13 – 28 February 2010
- June 2010: 15 – 30 May 2010
- September 2010: August 23rd – September 5th 2010
- December 2010: 5 – 17 November 2010
- March 2011: 9 – 27 February 2011
- June 2011: 13 – 30 May 2011
- September 2011: 11 – 25 August 2011
- December 2011: 4 – 22 November 2011
- March 2012: 10 – 26 February 2012
- September 2012: 10 – 27 August 2012
- March 2013: March 23rd – April 13th
- September 2013: 10 – 26 August
- March 2014: 13 – 18 February 2014
- September 2014: 16 – 19 September 2014
- March 2015: 4 – 9 March 2015
- September 2015: 9 – 14 September 2015
- March 2016: 2 – 14 March 2016
- September 2016: 1 – 7 September 2016
- March 2017: 2 – 13 March 2017
- September 2017: 7 – 8 September 2017
- March 2018: February 26th – March 6th 2018
- September 2018: August 30th – September 1st 2018
- March 2019: February 21st – March 5th 2019
- September 2019: 6-9 September 2019
- March 2020: February 26th – March 4th 2020
- September 2020: August 31st – September 3rd 2020
- March 2021: March 4th – March 14th 2021
- September 2021: September 14th – September 24th 2021
- March 2022: March 1st – March 13th 2022
- September 2022: September 1st – September 7th 2022
- March 2023: March 1st – March 9th 2023
- September 2023: September 7th – September 18th 2023

More information

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

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

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

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