THE UNIVERSITY OF SYDNEY

Business School

Transport Opinion Survey (TOPS)

September 2024

Institute of Transport and Logistics Studies (ITLS)

About the Transport Opinion Survey

The Transport Opinion Survey is a biannual survey (quarterly from 2010) of about 1,000 adults aged 18 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 2024 survey was conducted between the 2nd and 11th of September 2024. This report is based on the data from 1,027 completed responses.

Highlights

Note: This survey was conducted from September 2nd to September 11th, 2024. Public confidence in transport has largely increased since March 2024 and is the highest since September 2021. The near-term and long-term transport confidence for both local areas and Australia have all improved, and Australia's transport confidence for both near-term and long-term transport is close to the starting indices for March 2010. According to the comments made by Australians, the main issues for transport focus on road congestion and the increasing pressure on the road system with population change. The public has acknowledged the recent improvement in public transport (e.g., new Metro in Sydney and lower fare in QLD), but they also emphasised the importance of expanding the overall public transport network to cover newly populated areas and having faster interstate connection. The public is still experiencing a high cost of living and a housing shortage. A noticeable increase of concern about housing shows the issue has become more severe. There are increased concerns about education, social issues, security, and terrorism. The increased concern about law and order in March 2024 has eased slightly. There is a 25% decrease in environmental concern compared to March 2024, which shows it is not an emergency for now. The dominant concerns remain to be housing, and economy and employment. The public has noticed improvements in public transport, road, and infrastructure projects. The public is conflicting on their views on public transport. On the one hand, there is an increase in positive feedback on public transport. On the other hand, the lack of service and the fact that it does not cover a wider area have caused more dissatisfaction with more new areas due to population growth. The issues with poor roads and increasing congestion are still significant. The public has also mentioned the transport costs, including fuel prices and higher public transport fares (excluding QLD, where public transport fares were reduced in August).

Despite the high cost of living, online shopping spending has only dropped slightly compared to March 2024. In a typical week, people have an average of 26% of working hours working from home (WFH) or from locations other than their main workplaces. The percentage of WFH hours remains, on average at 20%. These levels have remained stable since September 2023. Professionals, community workers, and salespeople have increased WFH hours, but managers have reduced them. During each weekday, on average, about 69% of workers work in the main workplaces, 18% work from home or other locations, and 13% work at both locations. However, people change their working patterns during the week. For the whole week, only 51% of workers work from the office and never from other locations. Only 6% of workers only work from home or other places and never work in the main offices. The remaining 43% of workers work from main offices and home or other locations, referred to as blended work locations. On the other hand, the percentage of weekly working hours remain almost unchanged at 74% from office, 20% from home, and 6% from other locations, out of an average of 38 working hours in a typical week. About 37% of commuting travel begins outside the traditional peak periods (decreased from 50% in March 2024). About 89% of workers believe productivity has either increased or maintained under flexible working arrangements. About 66% of workers also believe their employers think their productivity has improved or has not been influenced by the arrangements. 5% of Australians own or have ordered an electric vehicle (EV), with 10% considering ordering an EV in the next 12 months. Close to 37% of Australian households own at least one personal mobility device, such as a bicycle, scooter, e-bike, or e-scooter (increased from 33% in March 2024).

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

- In March 2024, 49% and 41% of Australians nominated housing and economy/employment as the top two priorities. In September 2024, these two areas still hold the top two spots, but housing has increased to 53%, showing the housing situation has become more severe. The concern about the economy and employment has remained at the same level but eased slightly with a 1% reduction, reflecting the circumstances in recent months with RBA's decision to place a hold on the cash interest rate. However, people are still under pressure due to the high cost of living.

Public transport and road improvements are the top priorities for transport

- In March 2024, 30% of Australians said that public transport improvement is the highest priority issue for transport in Australia. This has increased slightly at 31% in September 2024. About 25% of Australians said road improvement is the top priority, down from 27% in March 2023. This is followed by economic and financial problems at 22%, up from 20% in March 2024.

Opinions on transport in local areas have improved since March 2024

- In September 2024, 26% of Australians said that transport in their local areas was worse than one year ago, lower than 29% in March 2024. In contrast, 14% of Australians said that transport in their local area is better than one year ago, up from 9% in March 2024. People with neutral or no opinions is at 59%, down from 62% in March 2024.

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

- In September 2024, 18% of Australians said that transport in their local area would be better in one year, up from 15% in March 2024. In contrast, 23% of Australians said that transport in their local area would worsen in one year, down from 27% in September 2023.

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

- In September 2024, 22% of Australians thought that transport in Australia would improve in one year, up from 15% in March 2024. Furthermore, 23% of Australians believed that transport in Australia would worsen in one year, down from 29% in March 2024.

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

- In September 2024, 39% of Australians thought that transport in Australia would improve in five years, up from 33% in March 2024. Furthermore, 23% of Australians believed that transport in Australia would worsen in five years, down from 31% in September 2023. People with neutral or no opinions have slightly increased from 36% in March 2024 to 38% in September 2024.

ITLS Index of Transport Confidence

- Compared to March 2024, in September 2024, Australians are far more confident about transport in their local area (Confidence index: up from 77 to 95). The same applies to transport across Australia in one year (Confidence index: up from 72 to 99) and in five years (Confidence index: up from 81 to 99). Overall, all indexes have increased significantly compared to March 2024. The latest optimistic opinions may have been attributed to several factors, such as the opening of the new Metro in Sydney, lower public transport fares in QLD, and better weather overall in recent months, which has not caused further delays in public transport or worse road conditions.

About 79% of Australians ordered online in the last four weeks

- In September 2024, about 79% of Australians made online order(s) in the previous four weeks, up from 77% in March 2024. For those who ordered online, the average spending of $388 in the last four weeks is lower than $413 in March 2024.

Working people spend 26% of their work time working from home (WFH) for other locations

- About 67% of Australians have undertaken paid work in the last two weeks, the same as in March 2024. In a typical week, working people spend an average of 38 hours working, with 28.1 hours spent in their main workplaces (74%, up from 27.4 hours in March 2024), 7.5 hours from home (20%, down from 8.2 hours in

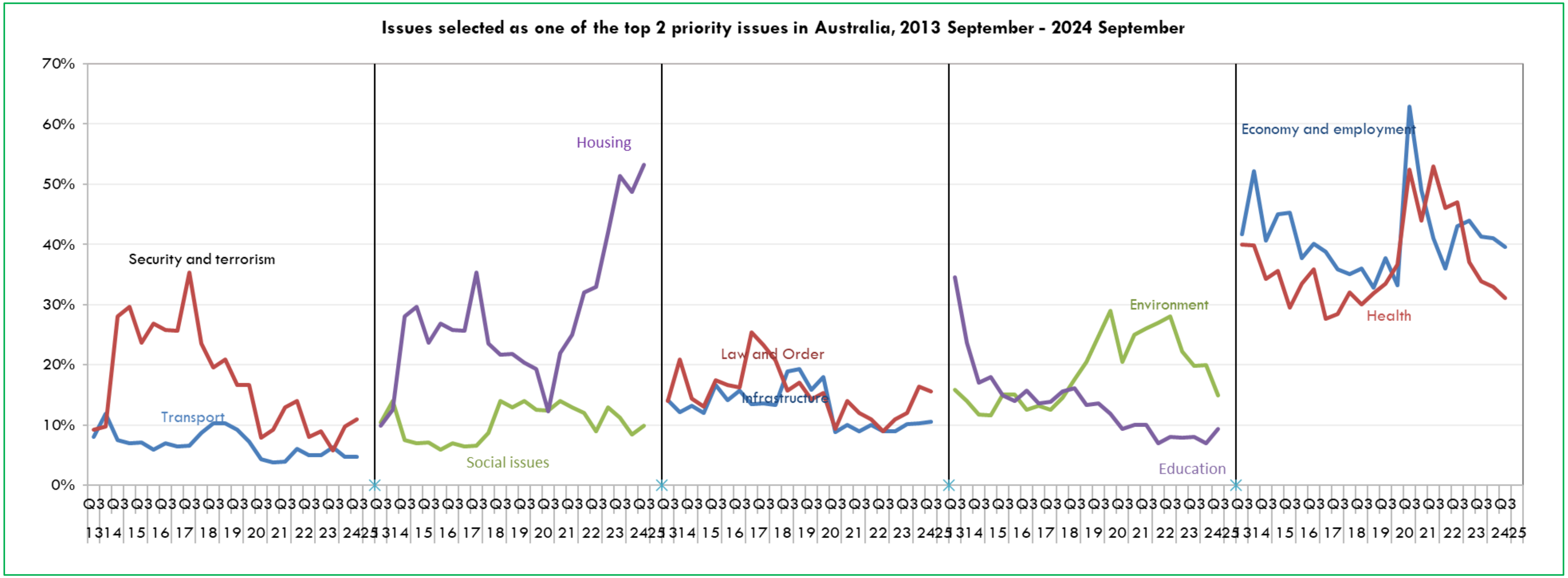
March 2024) and 2.3 hours from elsewhere (6%, down from 2.5 hours in March 2024). During each weekday, on average, about 73% of workers work in the main workplaces, 17% work from home, and 10% work at both locations.

- Of all the working hours, 20% are WFH hours (down from 22% in March 2024), and 26% are combined at home and other locations (down from 28% in March 2024). WFH percentages have decreased slightly in NSW, VIC and SA, with the largest decrease in QLD compared to March 2024. Professionals and technicians have increased WFH hour percentages, but all other occupations have reduced WFH percentages in working hours. The pattern of how people arrange their work hours is similar from Monday to Thursday now, with Friday having significantly higher WFH hours and WFH only workers. In capital cities, Melbourne has the highest percentages and hours working from home and other locations. For Melbourne, more people work from home at the beginning and the end of the week, with Friday at 37% of working hours WFH/other locations and Monday and Tuesday at about 32% WFH/other locations. The patterns are similar in other states, but there are far fewer WFH/other location hours. On average, 63% of commuters depart for work during peak hours, up from about 50% in March 2024. About 39% of employers have stipulated that workers must return to the office a particular number of days a week. About 6% of the workforce are polyworkers doing more than one job. Car use is the most prominent mode of commuting at about 63%, followed by using public transport at 25.2%, and using active modes such as walking and cycling at 6.1%.
- About 89% of workers believe productivity has either increased or is maintained under flexible working arrangements. About 66% of workers also believe their employers think their productivity has improved or has not been influenced by the arrangements.
- About 5% of Australians own or have ordered an electric vehicle (EV), with 10% thinking of ordering an EV in the next 12 months. About 37% of Australian households own at least one personal mobility device, such as a bicycle, scooter, e-bike, or e-scooter.

Transport as a national priority

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

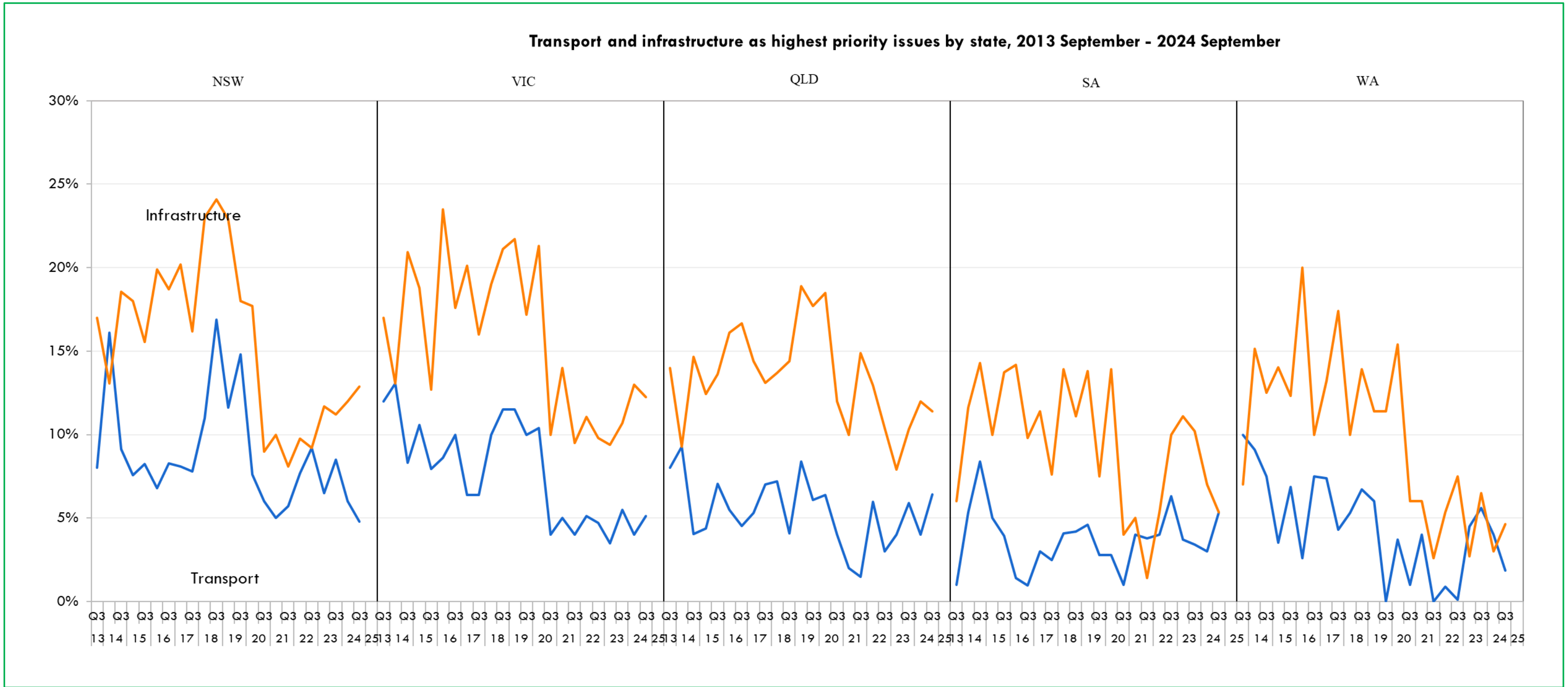
- People's opinions on national priorities reflect public concerns about the housing crisis. Housing remains the top priority, with 53% of Australians selecting it as the top priority. The pressure from the high cost of living, including food, energy, fuel, and other items, remains strong. Economy and employment (40%) is the 2nd top priority, slightly eased compared to March 2024, reflecting the impact of no further interest rate increase. The housing concern has increased since March 2024, primarily due to more severe circumstances in the housing market and higher prices and rent. There has been a slight increase of concerns on education, social issues, and security and terrorism, possibly reflecting recent coverages of these issues in media. The priorities that have decreased from the March 2024 survey include the environment (down from 20% to 15%) and health (down from 34% to 31%). Other priorities, such as transport (5% to 5%) and infrastructure (10% to 11%), have remained identical or similar.
- About 11% of Australians nominated infrastructure, and 5% selected transport as one of Australia's two highest priority issues, slightly up from March 2024.



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 percentage of residents of most states nominating transport as the top priority exhibits minor change compared to March 2024. In September 2024, 5% of New South Wales residents selected transport as a priority compared to 5% of Victoria residents, 6% of Queensland residents, 5% of South Australia residents and only 2% of Western Australia residents. The percentages of residents of most states nominating infrastructure as the top priority have not changed much compared to March 2024. About 13% of New South Wales residents, 12% of Victoria residents and 11% of Queensland residents selected infrastructure as the top priority, reflecting public concerns about infrastructure in their states. On the other hand, South Australia and Western Australia residents have fewer concerns, with only 5% in each state selecting infrastructure as the top priority.

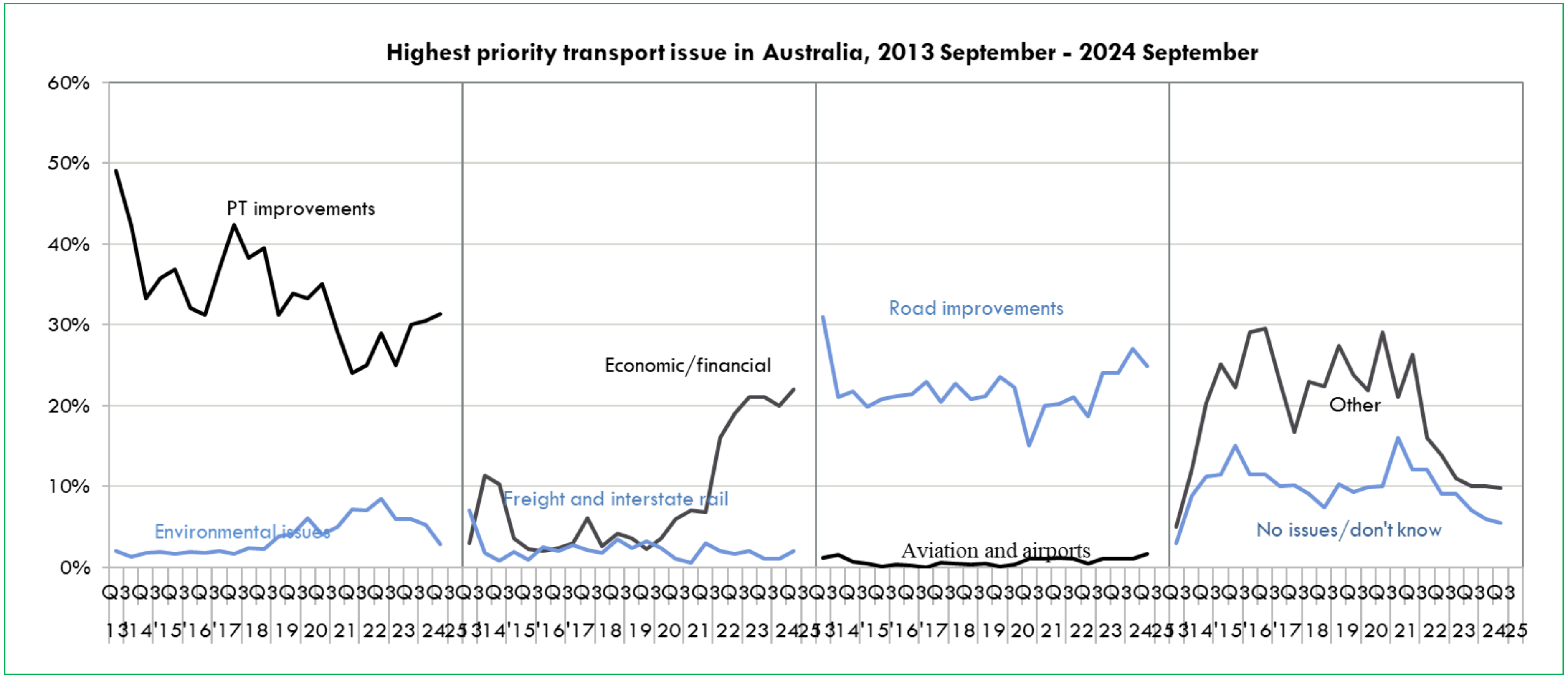
Highest priority issue for transport



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

- About 22% of Australians said that the highest priority for transport in Australia is economic and financial issues, a slight increase from 20% in March 2024. However, this priority for transport has remained high. Before March 2022, the level for this priority was typically below 10%. The recent four waves of TOPS in 2023 and 2024 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 a high cost of living.
- About 25% of Australians said road improvements are the highest priority issue, slightly down from 27% in March 2024. About 31% of Australians said public transport improvement is the top priority, slightly up from 30% in March 2024. For road improvement, many people cited the poor conditions of roads, but more dominantly the impact of heavy congestion and mixed traffic with trucks on the roads. Public transport improvements are related to public transport service issues and accessibility and connectivity to more areas. Increasing numbers of Australians mentioned that population growth and transport is behind for new and regional areas with growing populations.

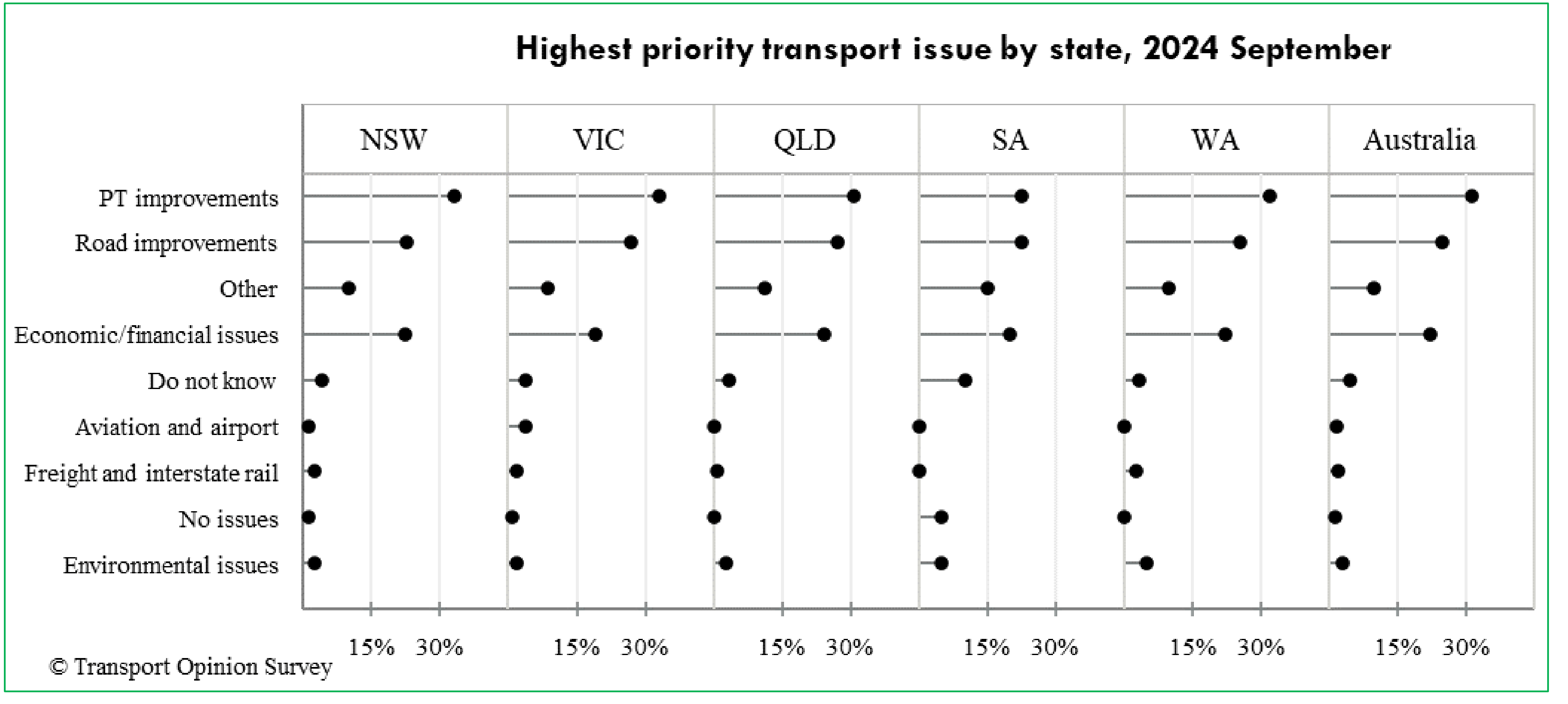
- Individuals nominated an identical amount of various priorities as "other" priorities as of March 2024, with 10% classified as other priorities. Only 3% of Australians selected environmental issues as a top priority for transport, down from March 2024 and only half compared to the level in September 2023.



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 health and terrorism.

- In the March 2024 survey, New South Wales residents consider public transport improvements more important than road improvements (37% vs. 25%). The level for public transport improvements is also much higher in NSW than in other states and higher than the national average (37% vs. 30%). South and Western Australians consider road improvements more important than public transport improvements (23% vs. 21% in SA and 35% vs. 23% in WA).
- Victoria residents consider road improvements less critical than public transport improvements (28% vs. 31%). Queensland residents consider road and public transport improvements equally important at 28%.
- Australians in other states and territories consider road improvements more important than public transport improvements (31 vs. 23%).

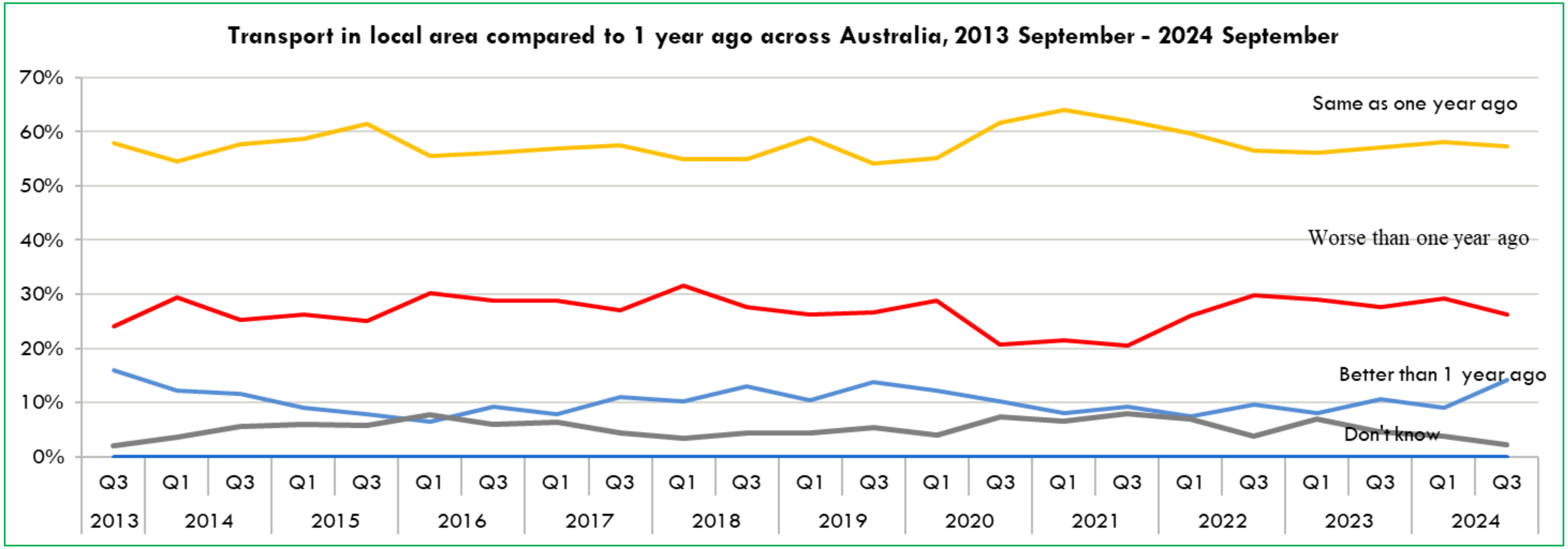
- Many have acknowledged recent improvements in public transport service quality and recent positive changes in public transport, such as the new Metro line in Sydney. They also pointed out the lack of accessibility and connectivity issues in new areas and areas with population growth. The main problems regarding road improvement are primarily related to more severe road congestion due to population growth, increasing number of cars and heavy trucks on roads, driver behaviour and other reasons. There is also a strong urge from the public to improve the current road infrastructure.
- Economic and financial issues are among the top three priorities in all states and territories. Many have mentioned the soaring costs of petrol. The three most important priorities are public transport improvements, road improvements and economic/financial issues. Australians currently have more focused priority choices for transport.



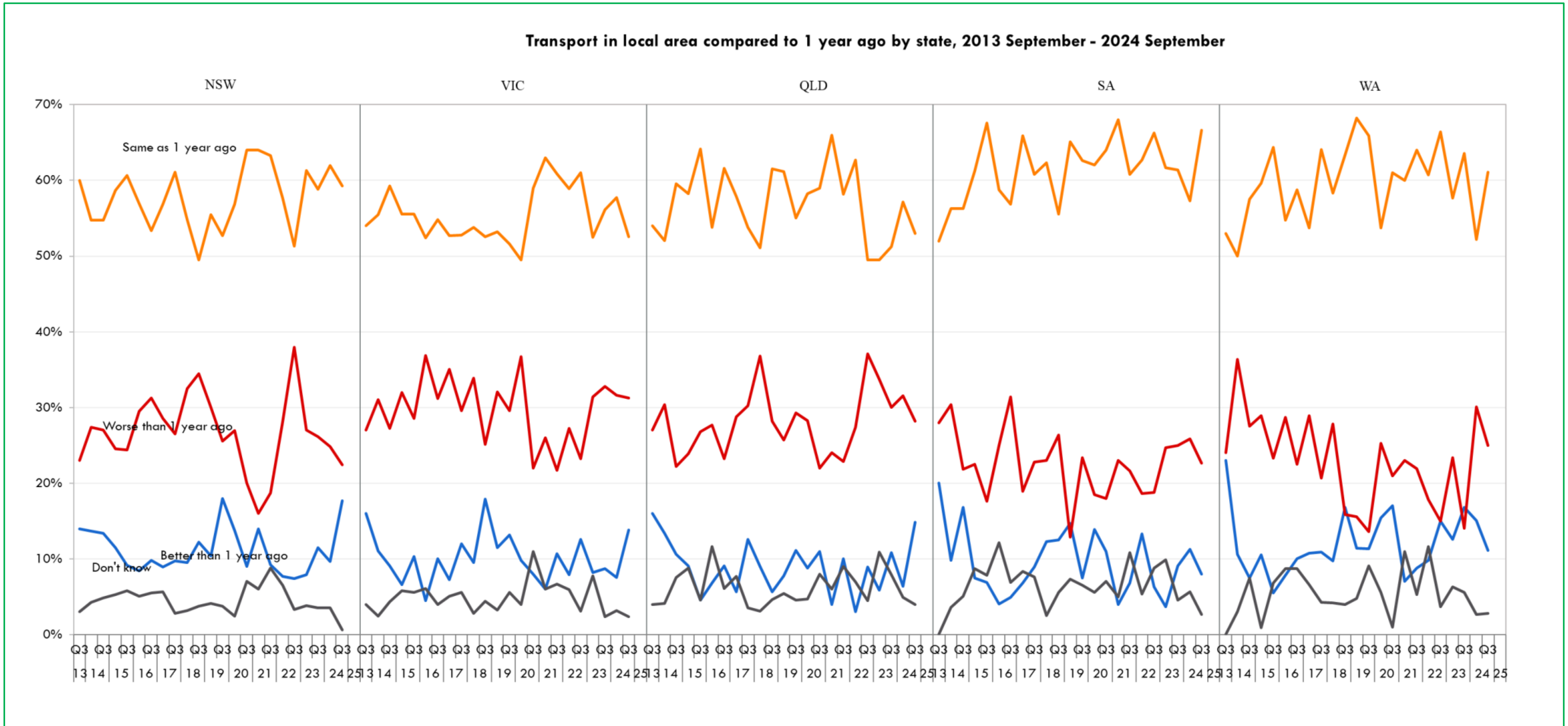
Local transport differs across states and territories

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 2024, 26% of Australians believed that transport in their local area was worse than one year ago (down from 29% in March 2024). About 57% of Australians said it is the same as one year ago (down from 58% in March 2024), and 14% said it is better now than one year ago (up from 9% in March 2024). Those who gave no opinions decreased from 4% in March 2024 to 2%, showing Australians had slightly more certainty in their views on this issue.

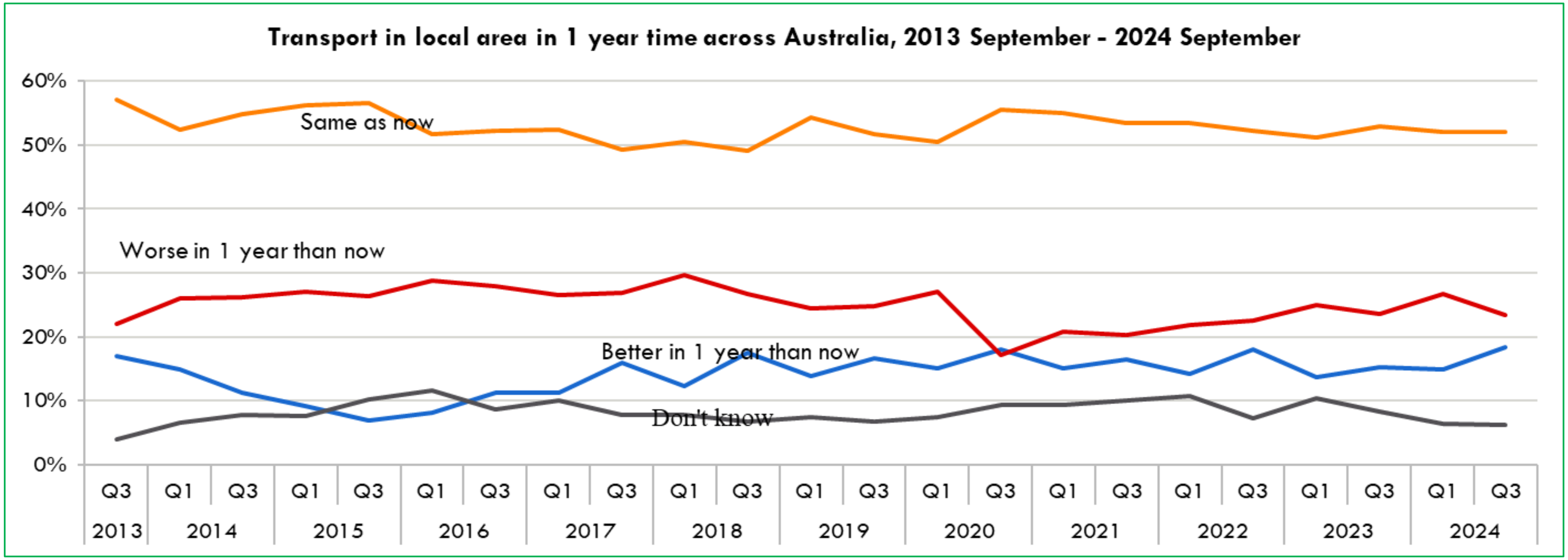


- Respondents' evaluation of transport in the local area is different across states of Australia, seeing a decreased percentage of people thinking transport in the local area is better than it was one year ago in SA (11% to 8%) and WA (15% to 11%). In contrast, there is an increasing percentage of people thinking transport in the local area is better than it was one year ago in NSW (10% to 18%), VIC (8% to 14%) and QLD (6% to 15%). However, more people believe the transport in the local area is the same as one year ago.
- In NSW, 77% of respondents believe the state of transport is better or the same, higher than 72% in March 2024. A similar rise in the combined positive and neutral opinions was also observed in VIC (66% to 67%) and QLD (64% to 68%). In WA, the same number is 72%, a 5% increase from 67% in March 2024. In SA, the combined positive and neutral opinions increased from 68% to 75%.

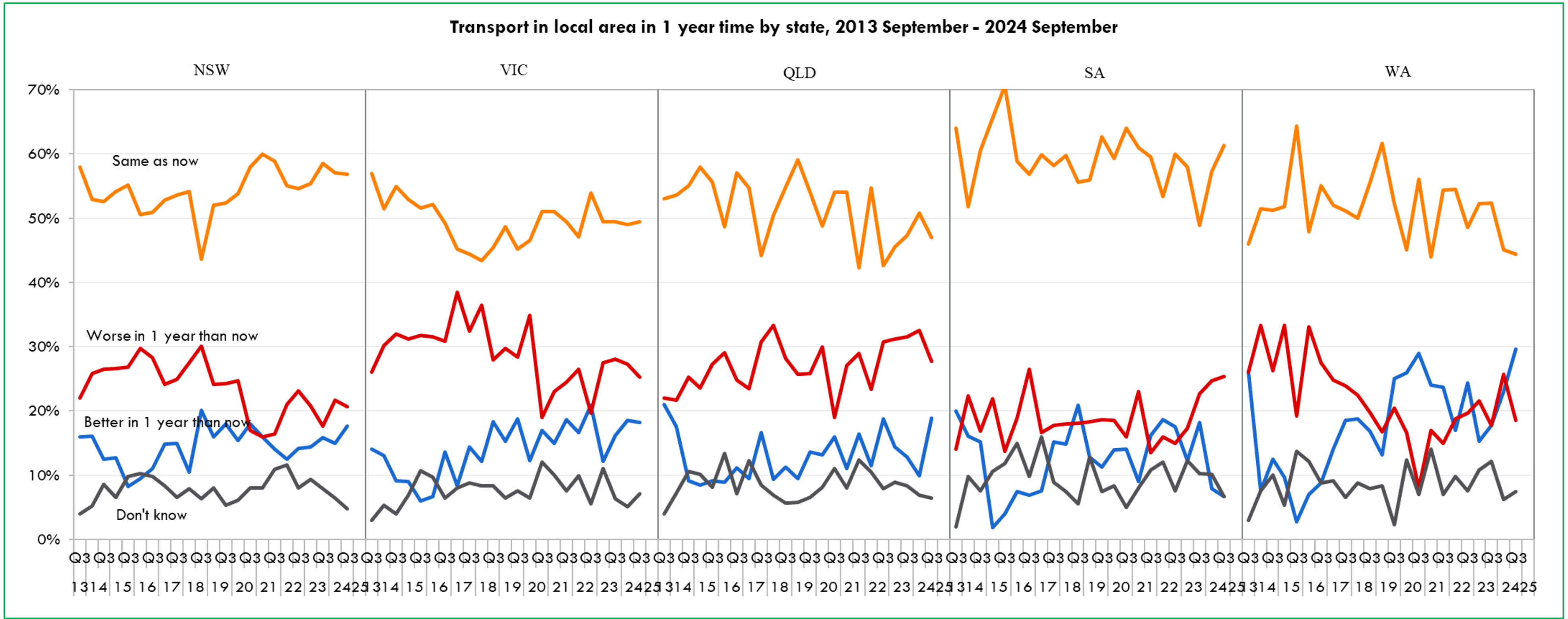


Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

- In September 2024, 52% of Australians said that transport in their local area would be the same in one year. 18% said transport would improve, increasing from 15% in March 2024. About 23% said transport would be worse, down from 27% in March 2024. About 6% of Australians did not offer their views on this question, which is identical to the level of March 2024.

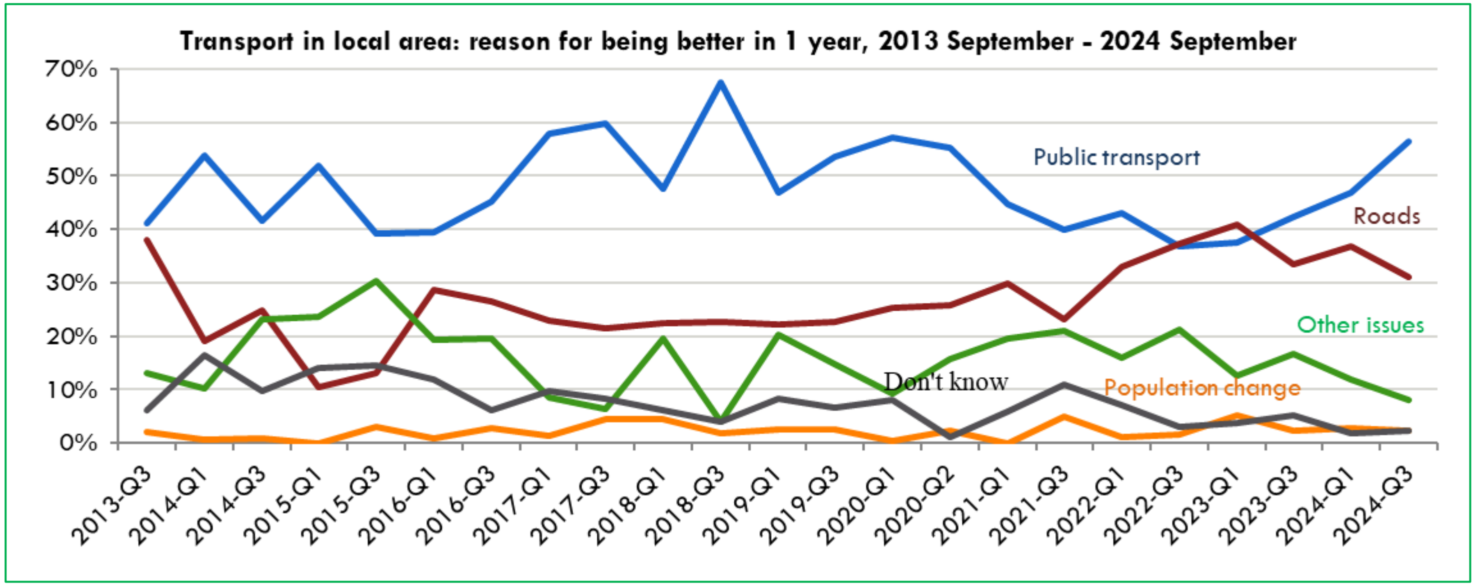


- Australians have responded with a mixture of confidence to transport in their local area in their states in one year, with some states showing a confidence level increase and others showing the opposite. NSW residents who chose "better" increased from 15% in March 2024 to 18%. VIC residents had shown slightly more confidence, shown by those who chose "worse", decreased from 27% in March 2024 to 25%. QLD has demonstrated the highest increase in confidence, with those who chose "better" increasing from 10% in March 2024 to 19%, most likely due to the recent introduction of 50 cents public transport fares. The confidence has maintained in SA following a significant decline in confidence in March 2024, with people who chose "same" increasing from 57% in March 2024 to 61%. In WA, the group who chose "better" has risen from 23% to 30% compared to March 2024.

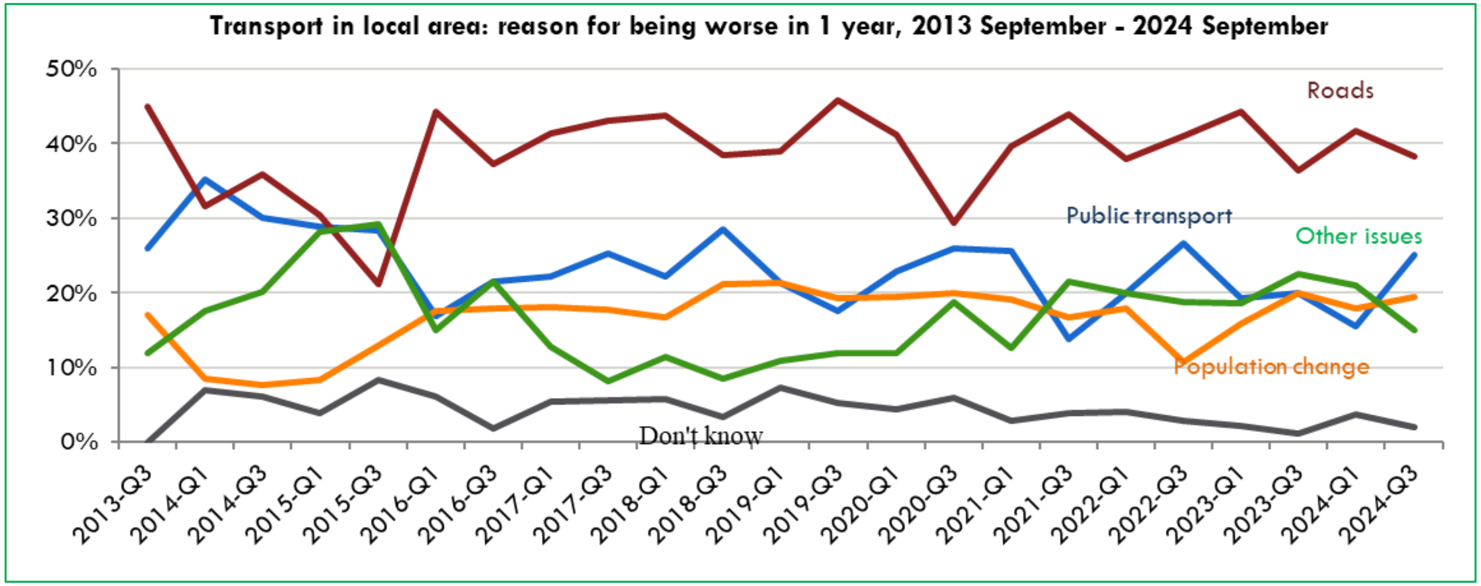


What were you thinking of most when answering that question [about transport in your local area in 1 years' time]?

- The main reasons Australians believe that transport will improve or worsen in their local area are public transport and road improvements. Public transport services and roads are the main reasons residents think their local transport will improve in one year, at 56% and 31% respectively. Roads are the most prominent reason residents believe that their local transport will worsen in one year's time at 38%, down from 42% in March 2024. People mentioned congestion, poor road conditions, and trucks on roads issues as the main reasons why they believed that transport in their local area would worsen in one year. Public transport issues are the second reason people thought their local transport would be worse. Population change, and other issues, are the third and fourth reasons 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.

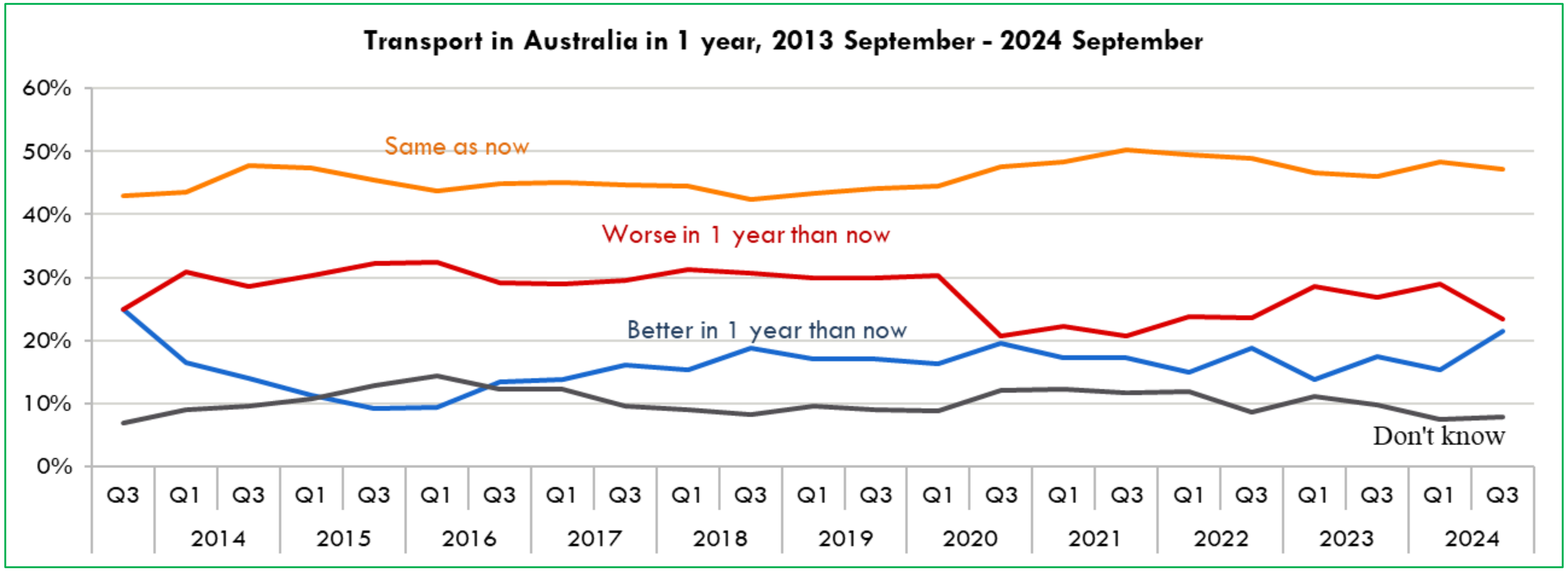


Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

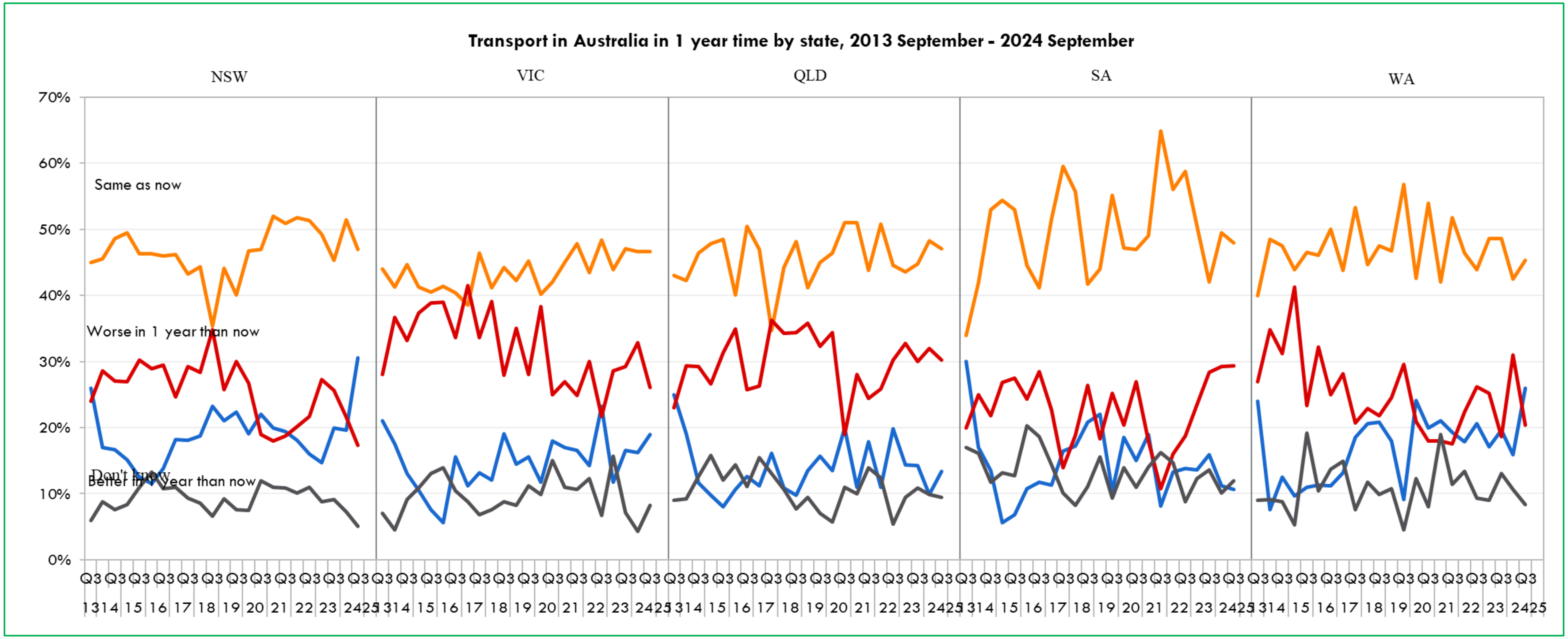
Confidence about transport in Australia has decreased in both short-term and long-term

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 2024, 47% of Australians said that the state of transport in Australia in one year will be the same as now, with 22% of Australians saying that transport in Australia will be better in one year, up from 15% in March 2024. In contrast, 23% of Australians said that the state of transport in Australia in one year would worsen, down from 29% in March 2024.

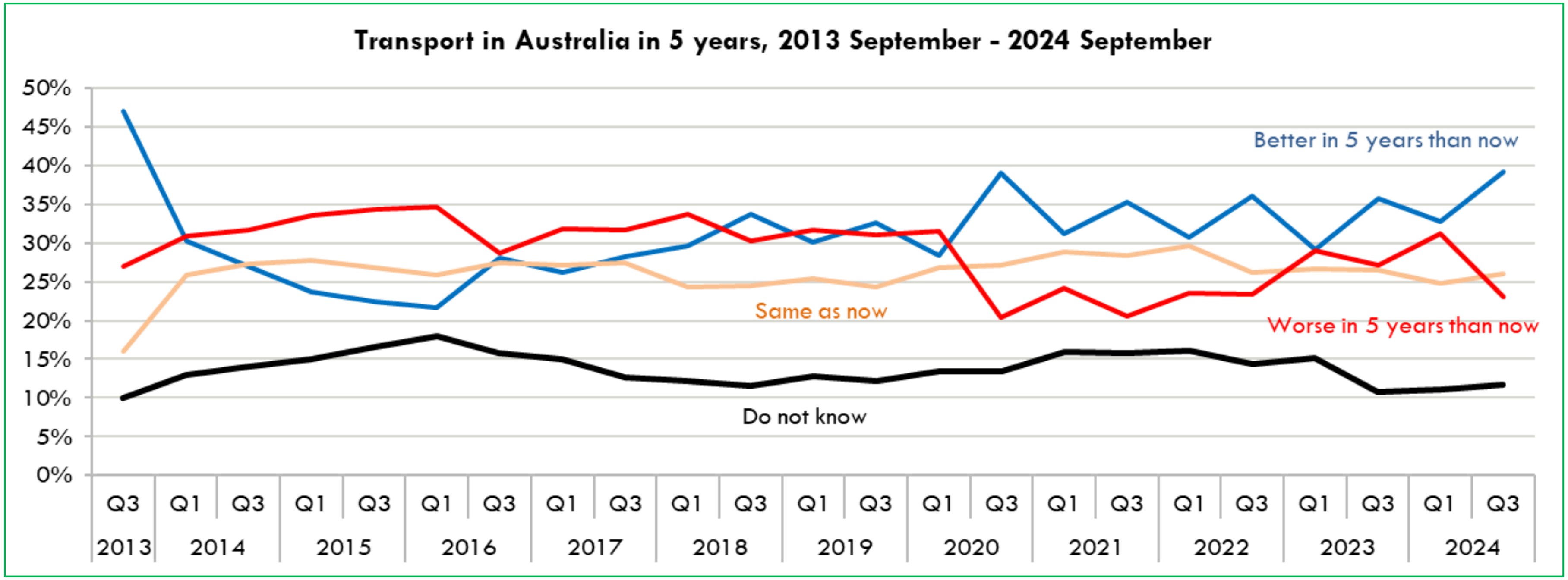


- In September 2024, about 31% of NSW residents said that the transport in Australia would be better in one year, up from 20% in March 2024. About 78% of NSW residents chose "better" or "same", up from 71% in March 2024. In VIC, 26% of VIC residents noted that the state of transport in Australia would be worse in one year, down from 33% in March 2024. In QLD, 13% of QLD residents said the state of transport in Australia would be better, up from 10% in March 2024. About 11% of SA residents said that the state of transport in Australia would be better in one year, down from 16% in September 2023. There have not been any changes regarding the opinions for South Australians, with 11% of SA residents saying that the state of transport in Australia would be better in one year. In WA, there has been an increase in those who believed the state of transport in Australia would be better in one year, up from 16% to 26% in September 2024. There has been a decrease in those who believed the opposite, down from 31% to 20% in September 2024. Overall, Australians in all states have more confidence about the state of transport in Australia in one year's time.

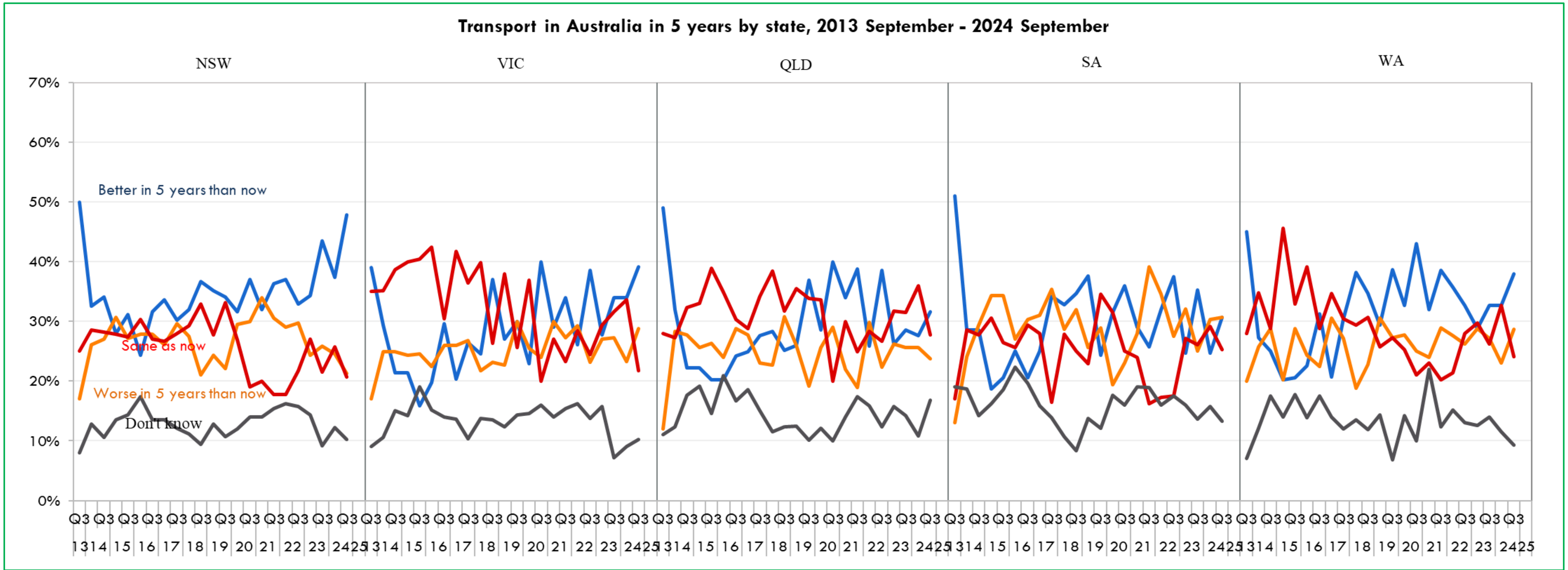


Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

- Australians are more confident that the state of transport will be better in five years than it is now. In September 2024, 39% of Australian residents believed transport in Australia would improve in five years, up from 33% in March 2024. People who think the state of transport in Australia will worsen in five years is at 23%, down from 31% in March 2024.



- Australians across all states are gaining more long-term confidence in transport. NSW residents have shown more confidence in both the short and long terms. Their views on Australia's long-term transport state are positive. The percentage of NSW residents who believe Australia's transport will be better, increased from 37% in March 2024 to 48% in September 2024, while the percentage of residents who think it will be worse has decreased from 26% to 21%. Those who think transport will worsen in VIC dropped from 34% in March 2024 to 22% in September 2024. In QLD, the percentage of QLD residents who believe Australia's transport will be worse in five years decreased from 36% in March 2024 to 28% in September 2024. In SA, the percentage of SA residents who believe Australia's transport will improve in five years increased from 25% in March 2024 to 31% in September 2024. In WA, the percentage of WA residents who believe Australia's transport will be worse in five years decreased from 33% in March 2024 to 24% in September 2024. In summary, Australians have an overall higher long-term confidence about transport in Australia in five years' time.



Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey on 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.

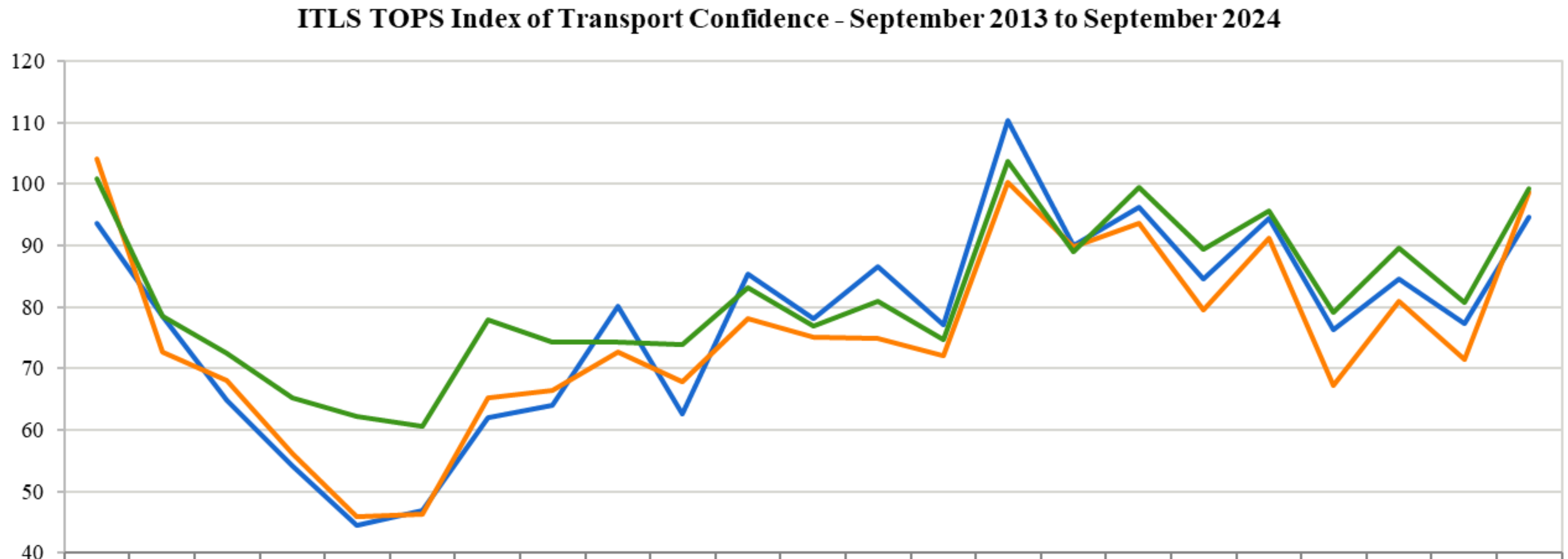
A TOPS Index value of more than 100 means that Australians' confidence about the state of transport getting better is more substantial relative to March 2010. A TOPS Index value of less than 100 means such confidence is weaker than in March 2010.

The TOPS Index shows that in the September 2024 quarter, as compared to March 2024:

- 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, population increase, and the cost-of-living pressure, on people's overall confidence, including their confidence in transport. Compared to the launch of TOPS in March 2010, Australians are slightly less confident about improvements in transport in their local area in September 2024 (Confidence index: from 100 to 95). Australians are almost equally confident about improvement in transport in

Australia in the next year (Confidence index: from 100 to 99) and in five years' time (Confidence index: from 100 to 99). There has been a significant increase in confidence since March 2024. People have been encouraged by recent improvements in transport, such as more consistent public transport services, the opening of the new Metro in sydney, the introduction of lower public transport fares in Qld, and other enhancements. At the same time, they have overcome many challenges in the past year due to the increased cost of living and have recovered some confidence since March 2024. However, the consequences of some ongoing events, such as the housing crisis and increased cost of living, will continue to impact transport. We will continue to observe whether there will be a continuous recovery of confidence in the 2025 surveys.

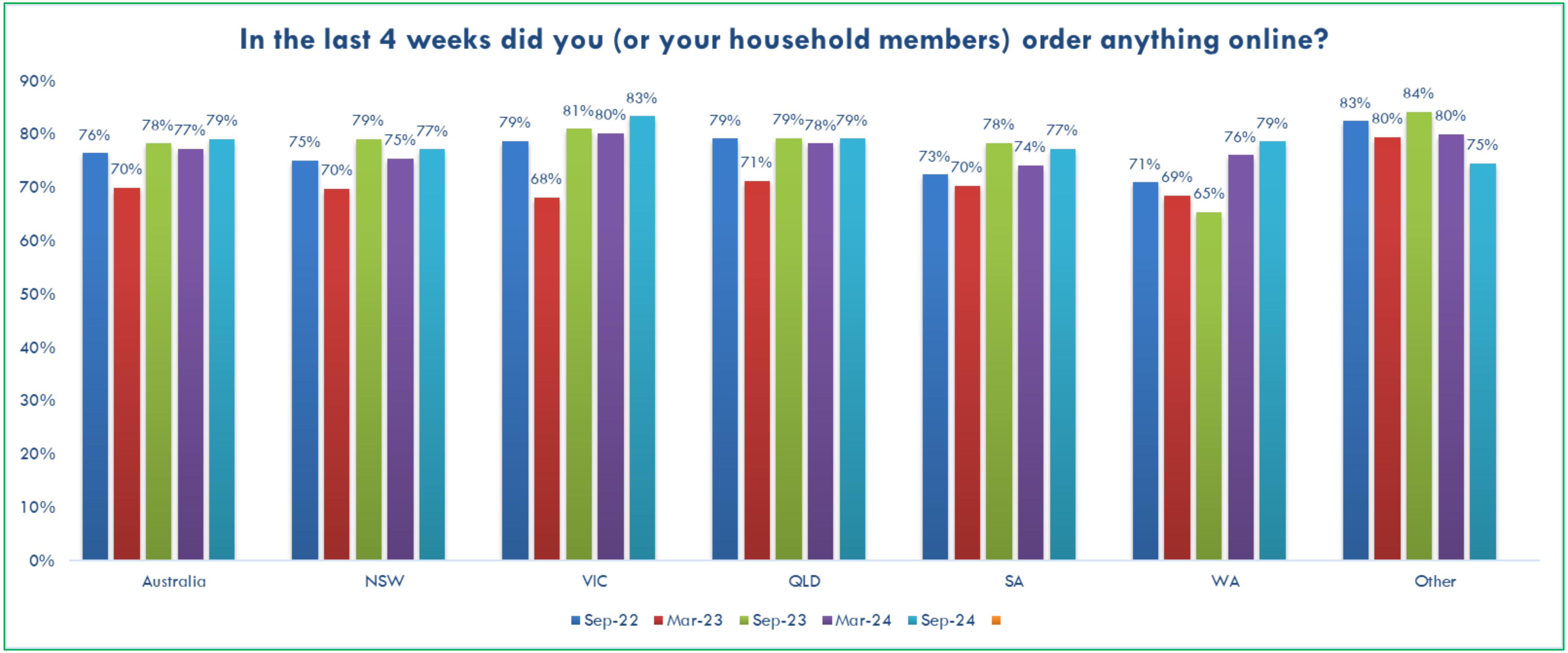


	2013-Q3	2014-Q1	2014-Q3	2015-Q1	2015-Q3	2016-Q1	2016-Q3	2017-Q1	2017-Q3	2018-Q1	2018-Q3	2019-Q1	2019-Q3	2020-Q1	2020-Q3	2021-Q1	2021-Q3	2022-Q1	2022-Q3	2023-Q1	2023-Q3	2024-Q1	2024-Q3
Transport in local area in 1 year	94	78	65	54	44	47	62	64	80	63	85	78	87	77	110	90	96	84	94	76	85	77	95
Transport in Australia in 1 year	104	73	68	56	46	46	65	66	73	68	78	75	75	72	100	90	94	80	91	67	81	72	99
Transport in Australia in 5 years	101	79	72	65	62	61	78	74	74	74	83	77	81	75	104	89	100	89	96	79	90	81	99

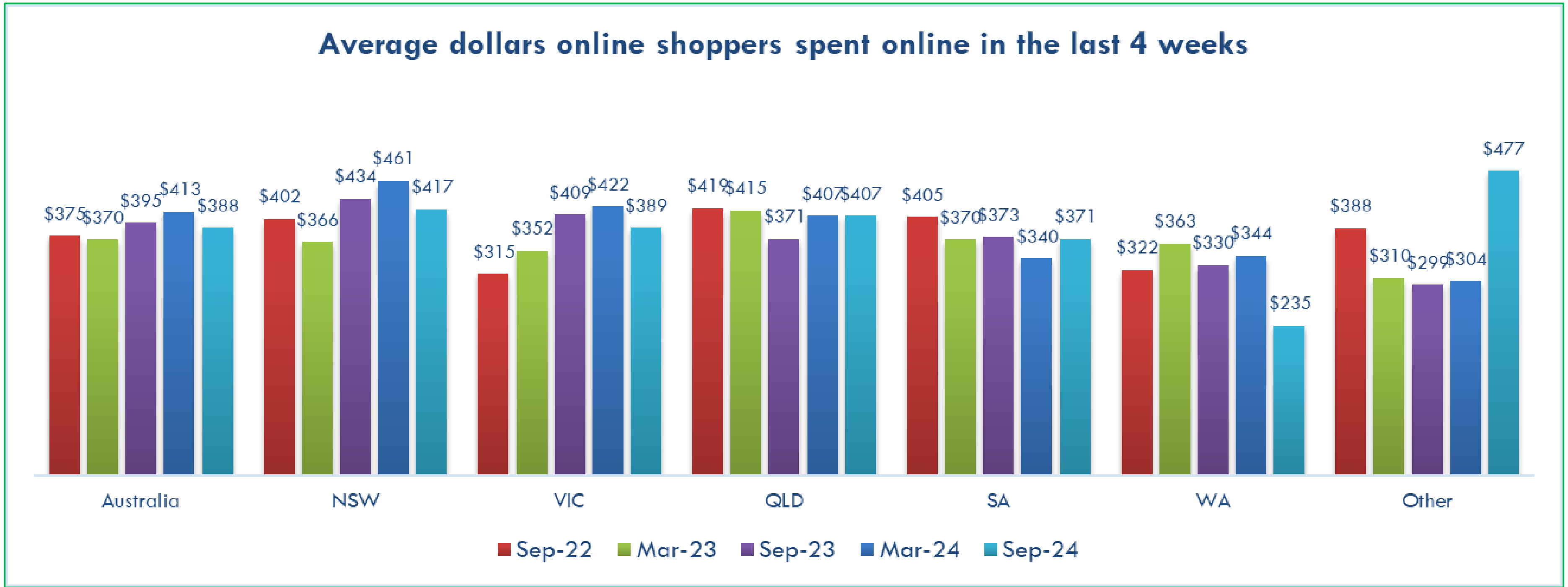
Supplementary questions in September 2024

Online shopping and total & category spending

– An increased percentage of Australians shop online compared to March 2024 with 79% of Australians shopped online over the last four weeks.



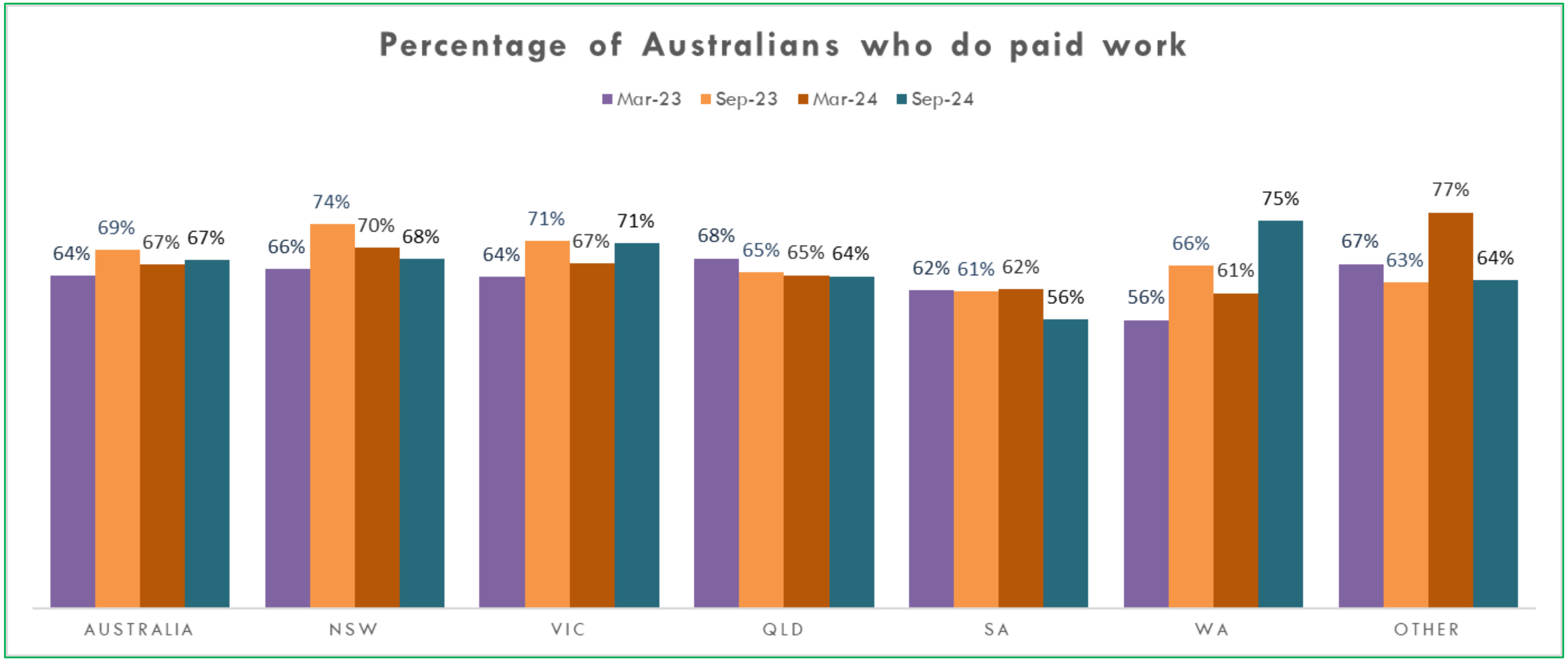
The graph below shows that online shoppers in Australia spent about $388 on average in the last four weeks, slightly less than an average of $413 in March 2024, indicative of the cost-of-living challenges. Online spending has been increasing, given the trend over the previous 18 months. Online shoppers in NSW and TAS/ACT/NT spent the highest amounts, averaging $417 and $477 in four weeks. In VIC and QLD, the average amounts are $389 and $407. In SA and WA, the average amounts are $371 and $235, respectively.



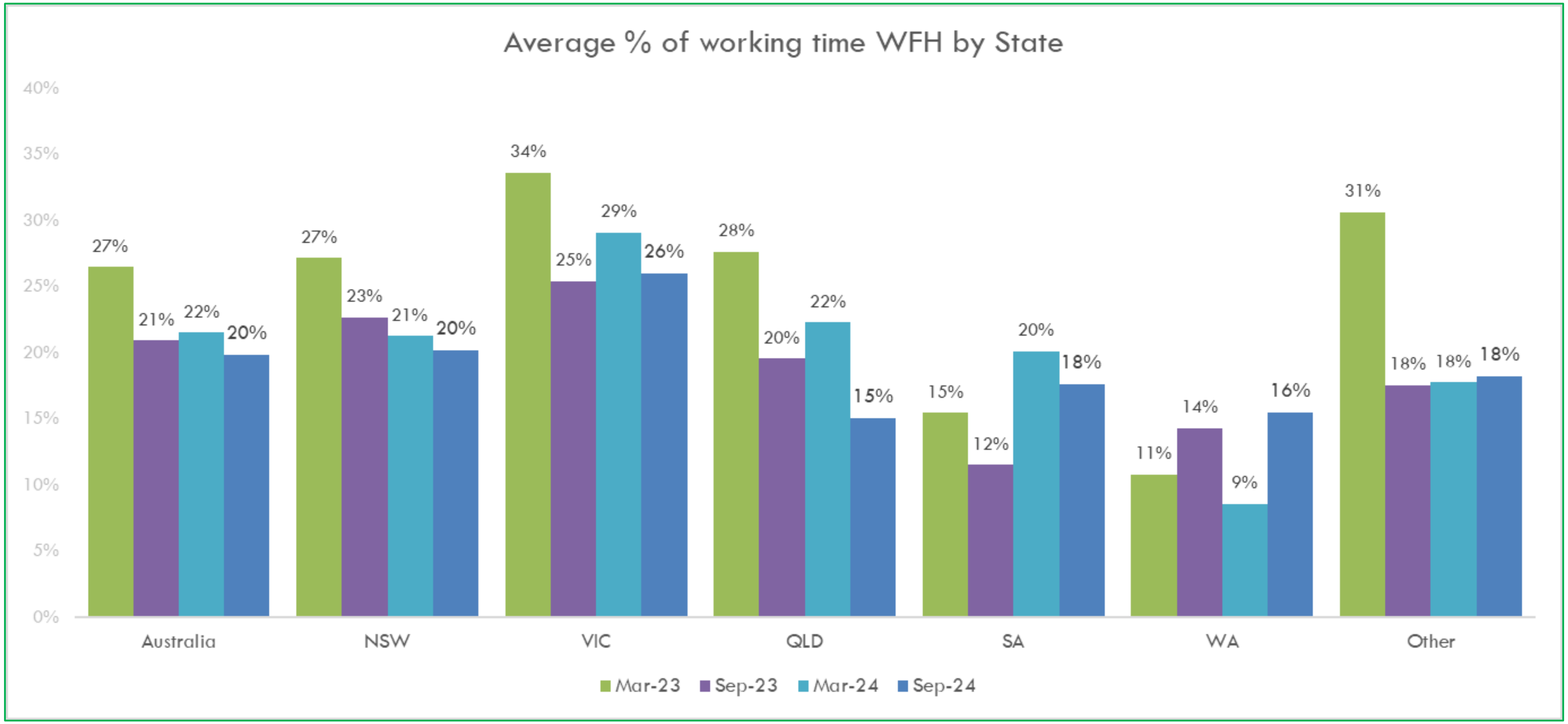
Weekly working hours in office, at home and other locations

From the March 2024 survey, we changed how we asked questions about work time and locations. We asked about work patterns in a typical working week instead of the recent week. A typical working week can better represent how people work and commute in the long term. We can still make some connections to past waves, especially regarding the incidence of WFH. A significant improvement in the new questions allows us to specify the number of hours for each day of the week (DoW) and time of the day (ToD) associated with various working locations, working hours, commuting time, and hybrid work. We adopt the new questions based on a typical working week in the follow-up questions about how they work.

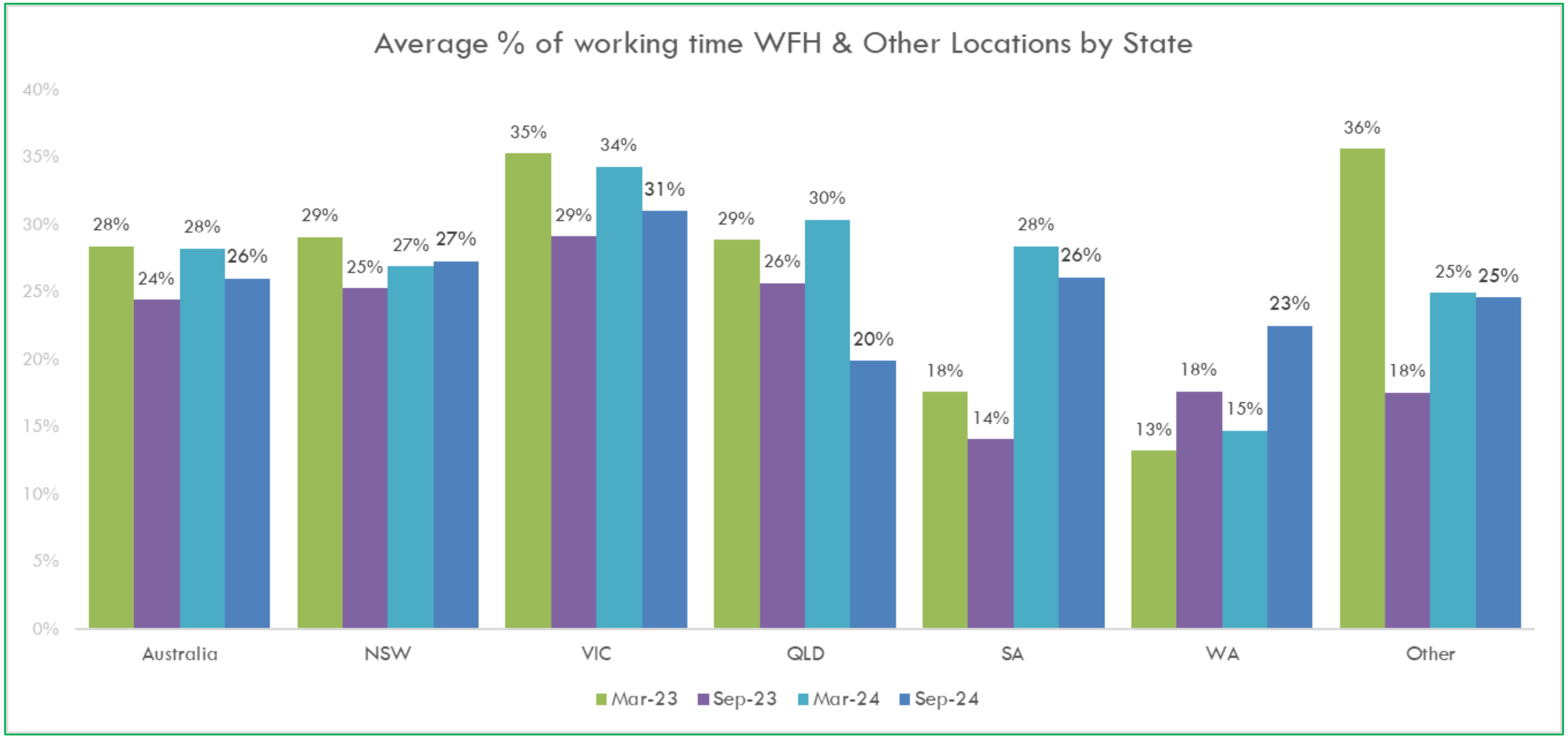
As shown in the chart below, 67% of Australians undertook paid work in a typical week, almost equivalent to the level in March 2024. In the three leading states with more working people, NSW, VIC, and QLD, the percentages of working people are 68%, 71%, and 64% respectively of the population. The working population increased in WA (61% to 75%) but decreased in SA (62% to 56%) and other states (77% to 64%) in September 2024. Of all the working people, about 6% mentioned that they have more than one job.



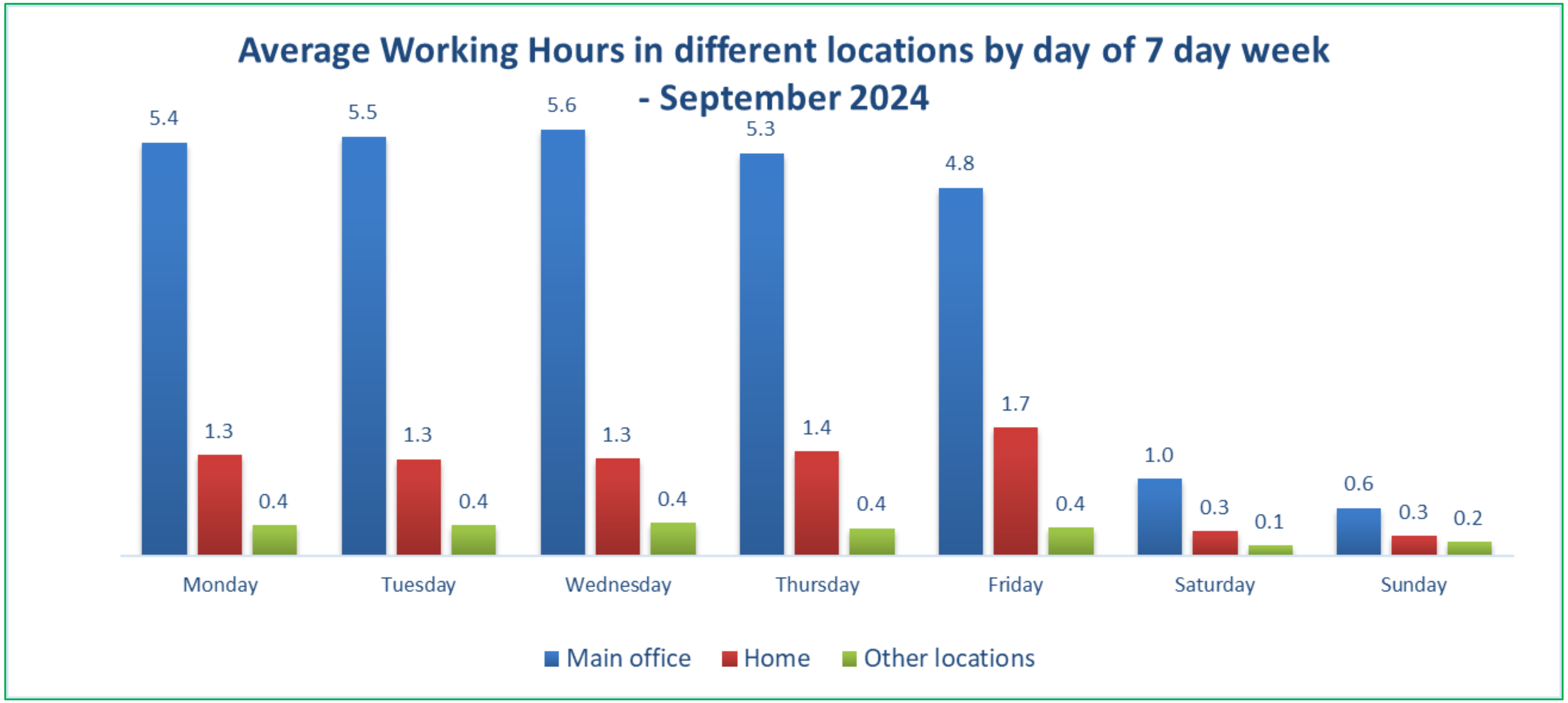
In a typical week, on average, workers spend about 37.7 hours working, with 27.9 hours spent in their main workplaces (74%), 7.5 hours from home (20%) and 2.3 hours from elsewhere (6%). These percentages are very close to what we observed in March 2024. In the chart below, WFH percentages have increased in WA, but decreased slightly in NSW, VIC and SA, and decreased more significantly in QLD, but VIC is still noticeably greater than other States At 26% A distinction must be made here: these WFH percentages are the percentages of weekly working hours, not people who work from home, which will be discussed further in this section.



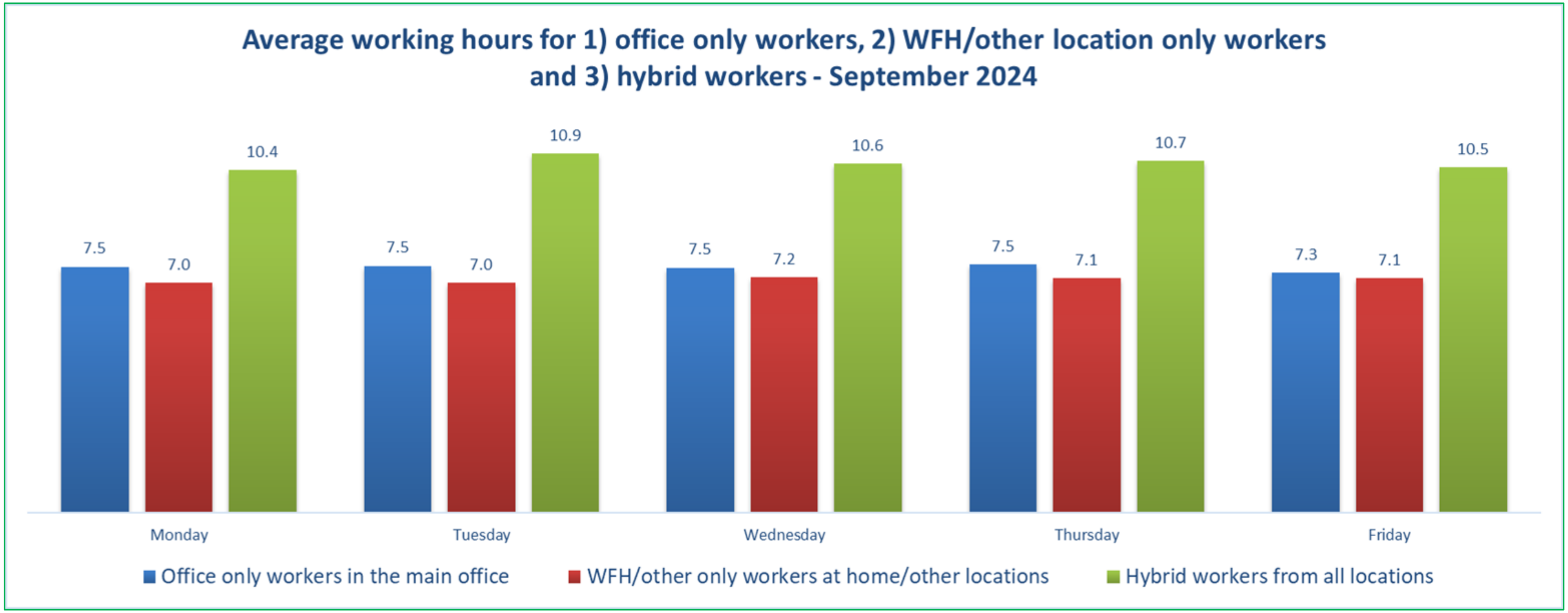
The chart below shows that including hours working from other locations than the main office, the WFH and other locations percentage is 26% on average, a slight decrease from March 2024. The percentage of working hours from home and other locations remains 27% in NSW and has increased in WA from 15% to 23% from March 2024. This percentage has decreased slightly in VIC (but still the highest at 31%), SA, and other states, but has significantly reduced in QLD (30% to 20%). This suggests that there is still noticeable adjustments occurring in the location of working hours.



Looking at each weekday and weekend day, on average, The chart below shows that working Australians work most in the main offices on Wednesday (5.6 hours), followed by Tuesday (5.5 hours) and Monday (5.4 hours). Friday is when people work the least hours in the main office (4.8 hours). In contrast, working Australians work the most hours at home or other locations on Friday (2.1 hours), followed by Thursday (1.8 hours). An equal number of hours are spent working at home or other locations on Monday, Tuesday, and Wednesday (1.7 hours). On Saturday and Sunday, Australians, on average, do not work more than 1.5 hours each day combining all locations.

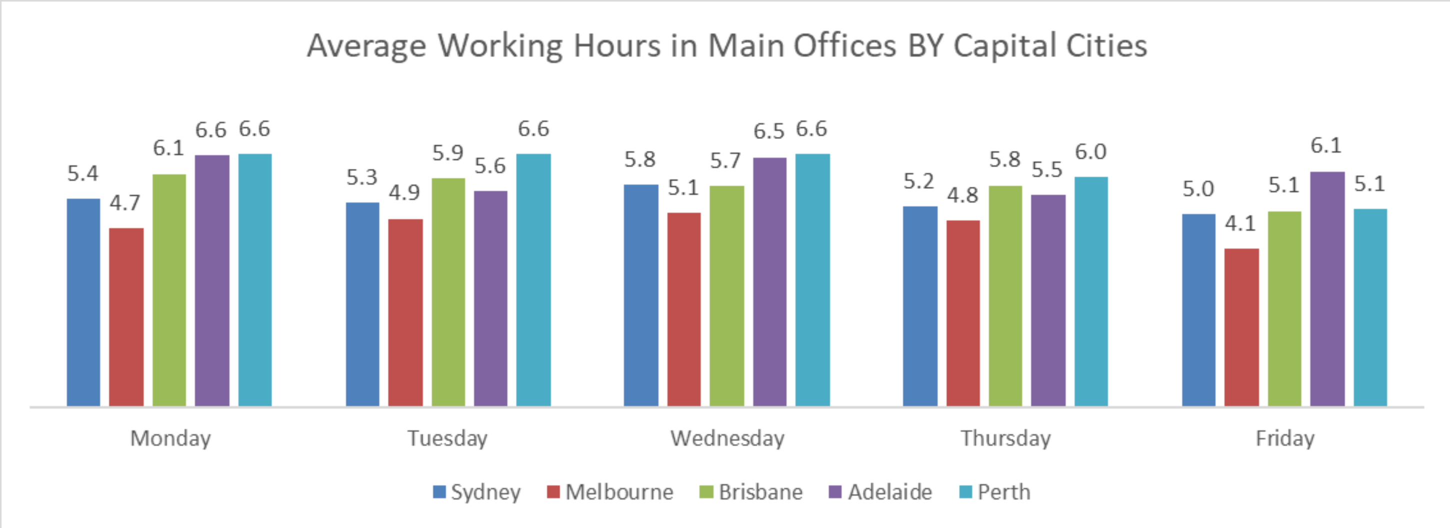


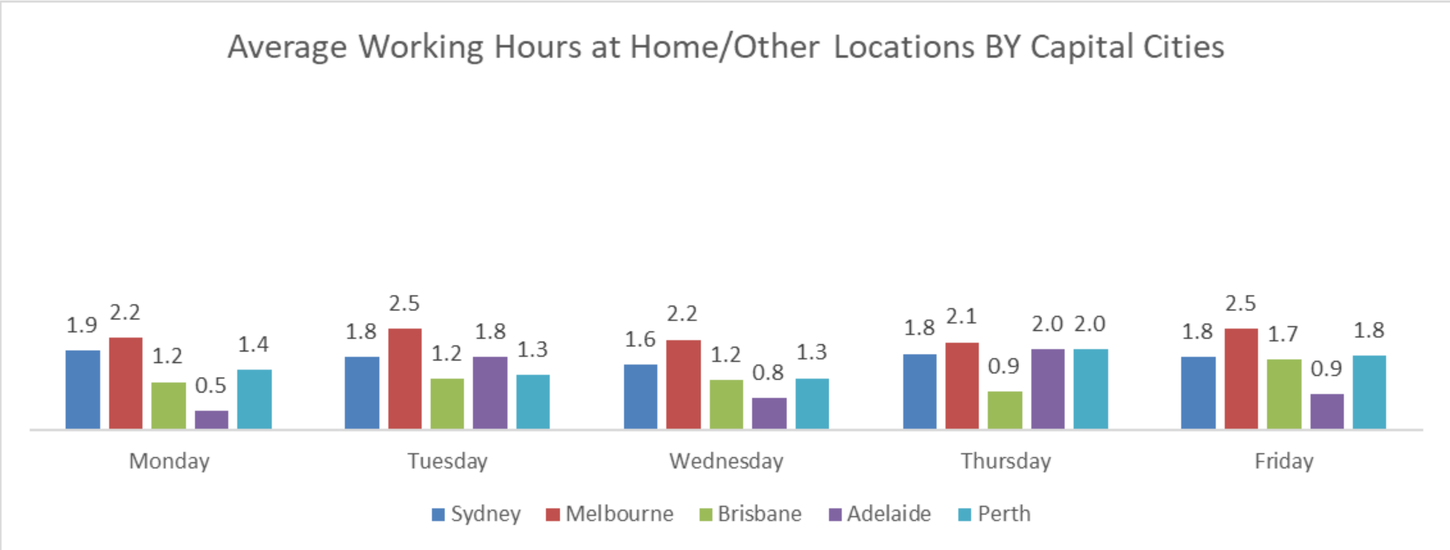
The chart below shows the average total daily working hours for three types of working Australians for each day of the week. First, those who only work in the main office but nowhere else, work 7.5 hours on average each weekday except Friday (7.3 hours). Second, those only working at home or other locations on a particular weekday, only work 7 to 7.2 hours each weekday. Third, those who work both in the main office and at different locations on a weekday, work 10.4 to 10.9 hours on average on each weekday. The last group of working Australians are often called the "hybrid" or "blended" workforce. They exhibit larger daily working hours out of the three groups. Later sections will reveal their occupation profiles and how much they account for varying work location activity in the workforce.

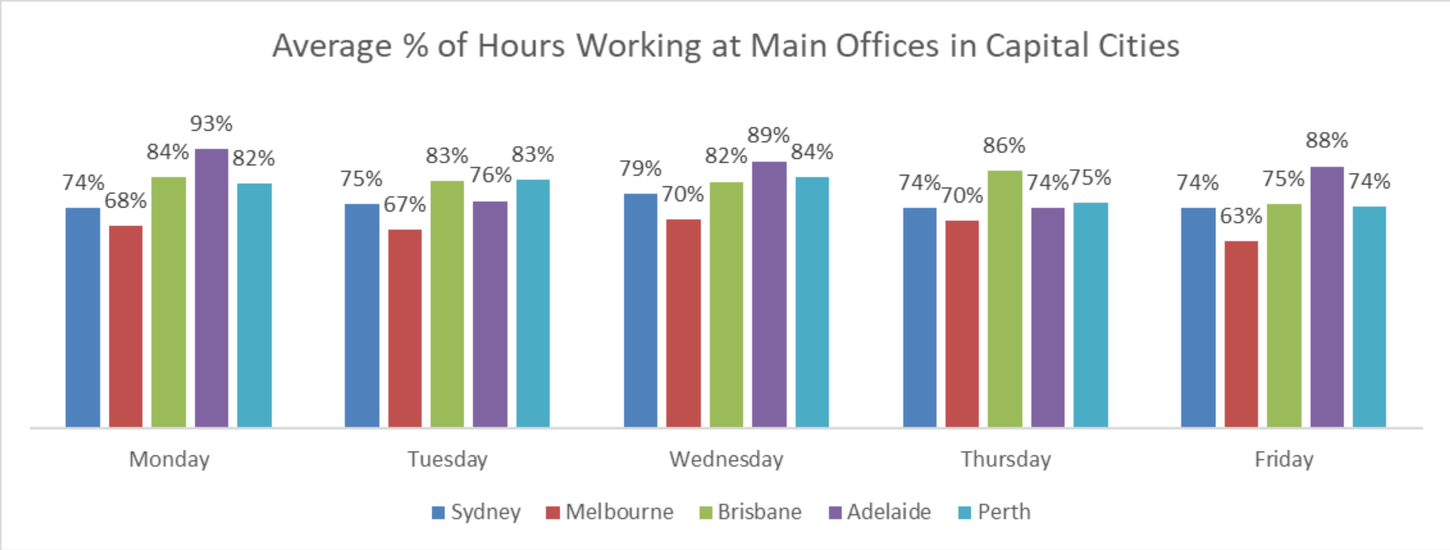


Weekly working hours of working Australians in capital cities

Among the five main capital cities Sydney, Melbourne, Brisbane, Adelaide and Perth, on average, the charts below show that working Australians in Melbourne work the least hours in the main office and the most hours at home or other locations across the week. They only spend 63% to 70% of their working hours in the main office. Sydney follows with 74% to 79% of working hours spent in the main office during weekdays. Working Australians in Brisbane spend 75% (Friday) to 86% (Thursday) of working hours in the main office. Workers in Perth are similar to workers in Brisbane in terms of the percentage of working hours in the main office, ranging from 74% to 84%. Working Australians in Adelaide spend the highest hours working in the main office. Although they work fewer hours in the main office on Tuesday (76%) and Thursday (74%). They spend 88% to 93% of their working hours in the main office on Monday, Wednesday and Friday. It is also easy to see that patterns of working in the main offices and at home/other locations are not the same across the main capital cities. While workers in Sydney, Melbourne, Brisbane and Perth like to do less work in the main office on a Friday compared to other weekdays, workers in Adelaide spend the least working hours in the main office on Thursday and Tuesday.

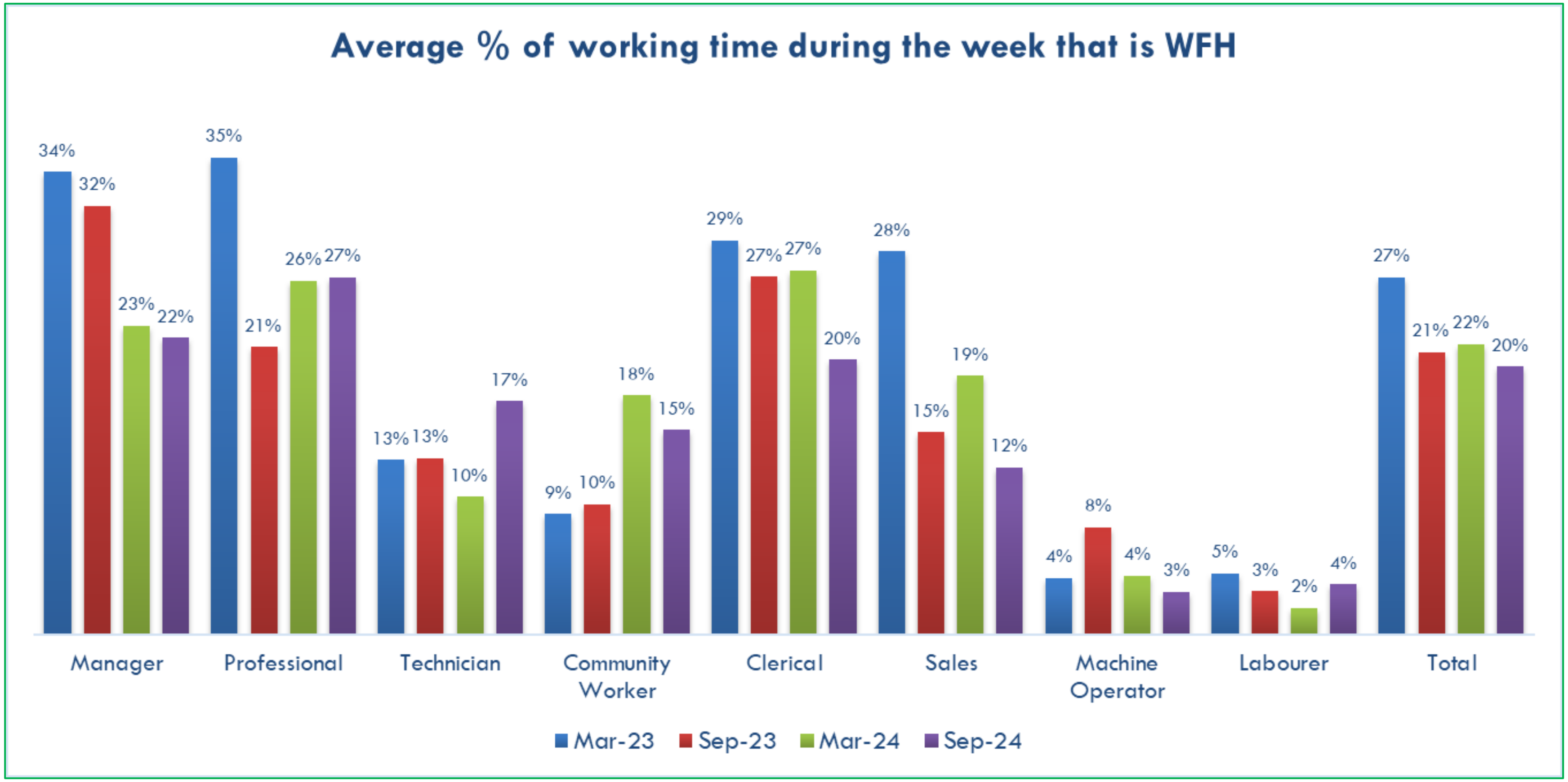

Average Working Hours in Main Offices BY Capital Cities
5.4
4.7
6.1
6.6
6.6
5.3
4.9
5.9
5.6
6.6
5.8
5.1
5.7
6.5
6.6
5.2
4.8
5.8
5.5
6.0
5.0
4.1
5.1
6.1
5.1
Monday
Tuesday
Wednesday
Thursday
Friday
Sydney
Melbourne
Brisbane
Adelaide
Perth


Average Working Hours at Home/Other Locations BY Capital Cities
1.9
2.2
1.2
0.5
1.4
1.8
2.5
1.2
1.8
1.3
1.6
2.2
1.2
0.8
1.3
1.8
2.1
0.9
2.0
2.0
1.8
2.5
1.7
0.9
1.8
Monday
Tuesday
Wednesday
Thursday
Friday
Sydney
Melbourne
Brisbane
Adelaide
Perth



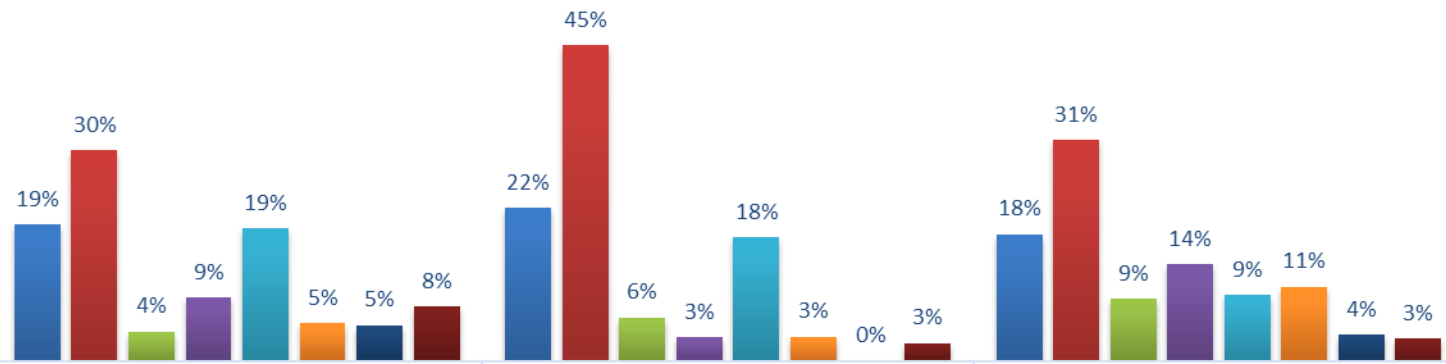
Occupation and work hours

Among all the occupations, professionals, technicians, managers and labourers have either increased slightly or maintained WFH percentages out of the total working hours compared to March 2024. Community workers, clerical and administration workers, and salespeople have reduced WFH hours compared to March 2024.



Occupation may play an critical role in explaining for each of the three groups of working Australians why they may have chosen the work arrangements and locations of work. Among those who work only in the office all day, averaged across all weekdays, 19% are managers, 30% are professionals, and 19% are clerical and administration workers. Hybrid workers have similar levels for managers (18%) and professionals (31%). There is a higher percentage of community and personal service workers at 14% (e.g., nurses and carers), a higher percentage of salespeople at 11%, and a higher percentage of technicians and tradespeople (9%). In contrast, the majority of workers who work at home and in other locations all day are professionals (45%), managers (22%), and clerical and administration people (18%). It explains why hybrid workers, on average, work longer hours daily compared to the other two groups because the occupations in which they have higher percentages are known to work longer hours and often need to work at different locations.

Occupations of Three Profiles of Working Australians (Weekday Average) - September 2024



	Office Only	WFH/Other Only	Hybrid/Blended
Manager	19%	22%	18%
Professional	30%	45%	31%
Technicians and trades	4%	6%	9%
Community and personal services	9%	3%	14%
Clerical and administration	19%	18%	9%
Sales	5%	3%	11%
Machine operators / drivers	5%	0%	4%
Labourer	8%	3%	3%

Profiles of working Australians for Day of Week (DoW) and the whole week

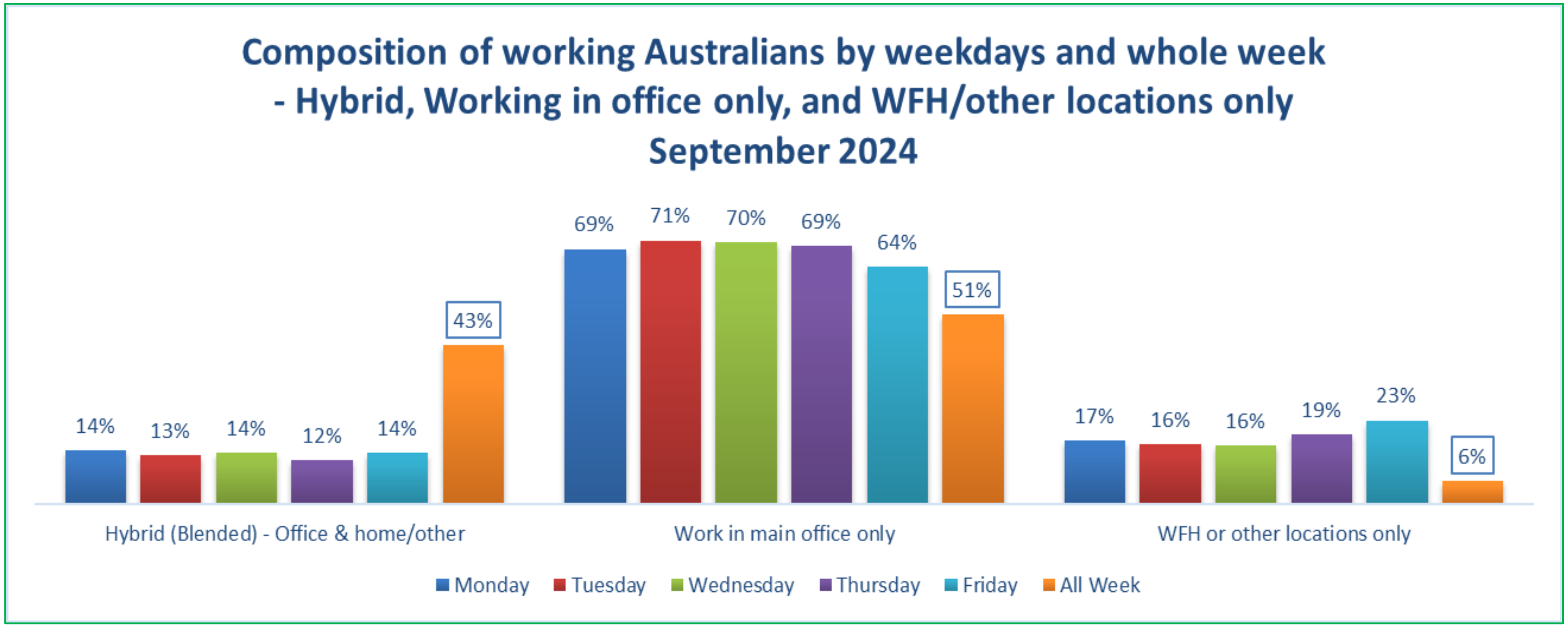
Previous discussion focussed on the percentages of working hours in a typical week. This section shows different profiles of working Australians. Generally speaking, there are three types of working Australians: 1) working Australians who only work in the main office for a particular period, either a particular day or a week; 2) working Australians who only work at home or other locations for a particular period and do not go to the main work office; and 3) working Australians who work both in the main office and at home or other locations during a particular period. The last type is often called hybrid workers (or blended workers). It is important to note that a worker belonging to a profile for a particular weekday does not mean she must have the same profile on a different day or week. Working Australians arrange their work locations differently. Some like to work at multiple locations on the same day, and some change locations on different days, such as working in the main office on Wednesday and completely working at home on Friday. This difference should be noted because working Australians can dynamically change their working patterns across a typical working week.

Whereas the days of week percentages refer to the percentage of working Australians participating in either blended work locations., office location only or WFH only on each day, we also need to show the overall number of working Australians who exhibit weekly blended working hours, office location only and WFH only profile.

We find as shown in the chart below, that for all working Australians, the weekly working hours profile is:

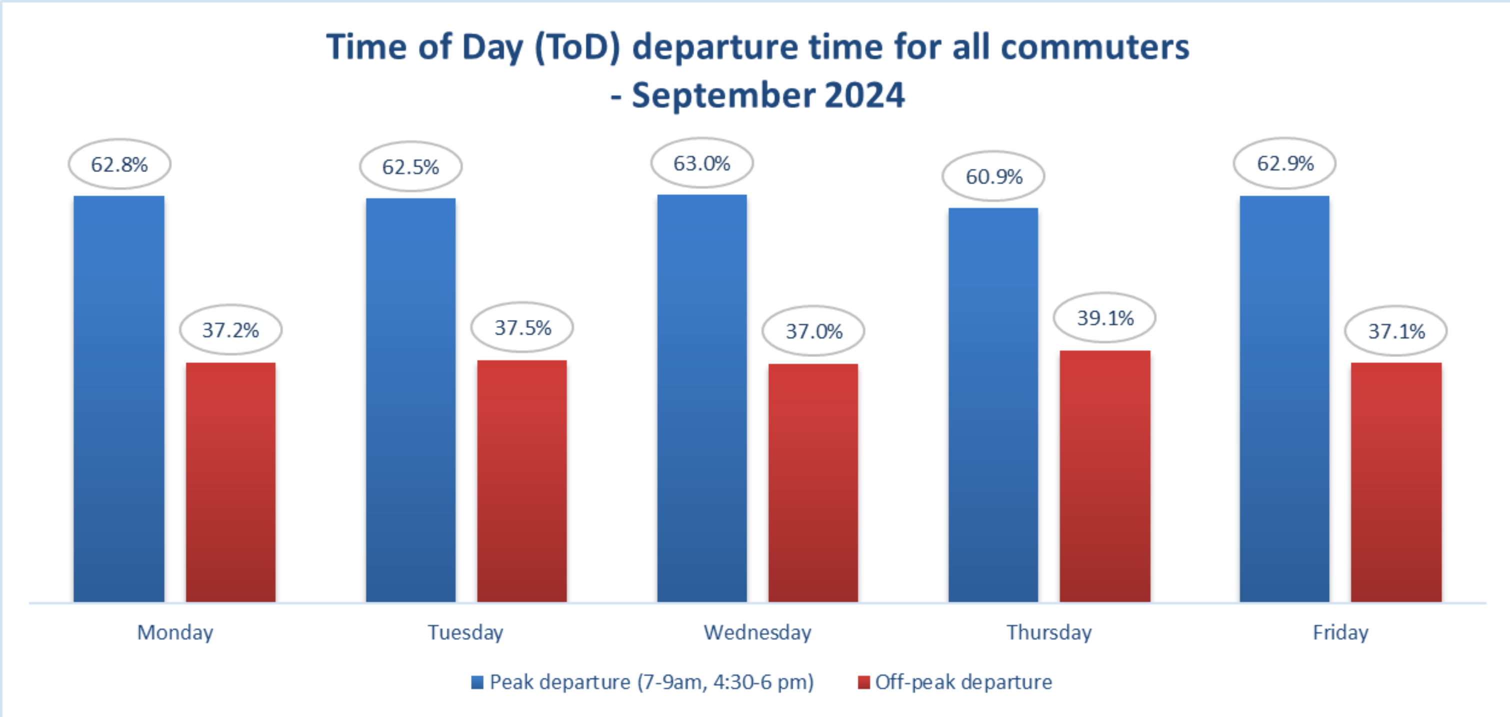
- 43% blended,
- 51% at a weekly office location only, and
- 6% is WFH and other locations.

For each DoW, we note the profiles are different to the weekly profiles, with hybrid/blended workers down to 12% to 14%, office only workers up to 64% to 71%, and WFH/other location only workers up to 16% to 23%.

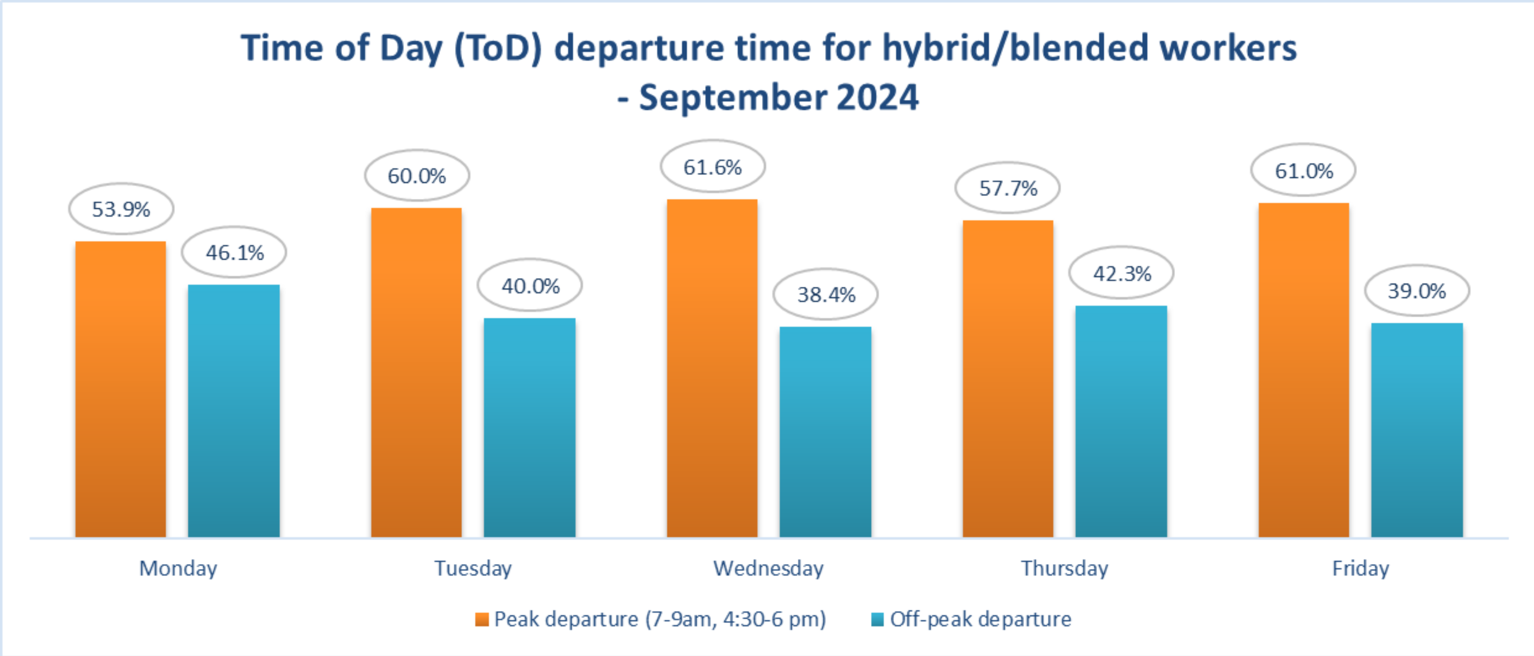


Commuting time and transport modes

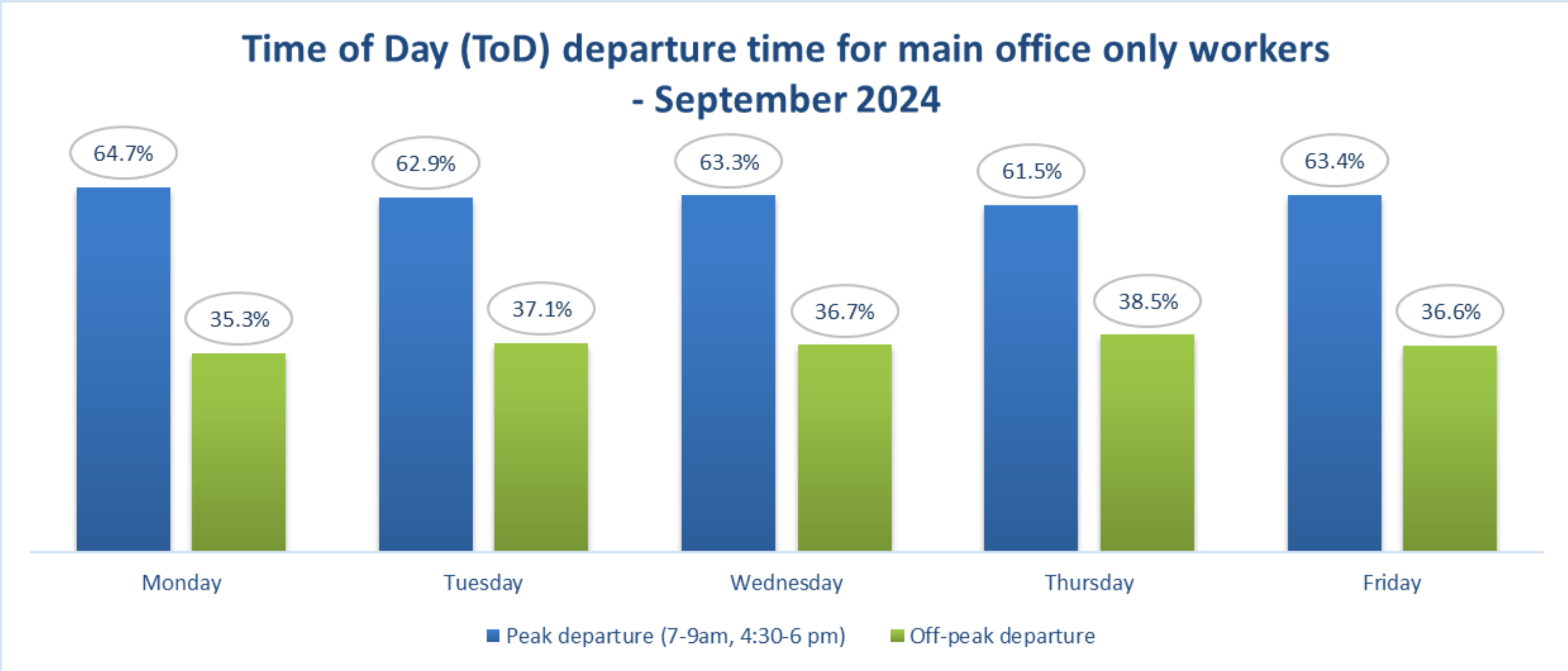
Workers commute to the workplace at different times throughout the week, and those who work in the office only and those who are hybrid workers also commute to work at different times, as shown in the following three charts. For all commuters (including both office only and hybrid workers), Monday, Tuesday, Wednesday and Friday have the higher percentages of people leaving home during peak hours (62.5% to 63%), either in the morning or afternoon peaks (i.e., afternoon peak for working the night shift). On Thursday, 61% of workers leave home on their commute during peak hours.



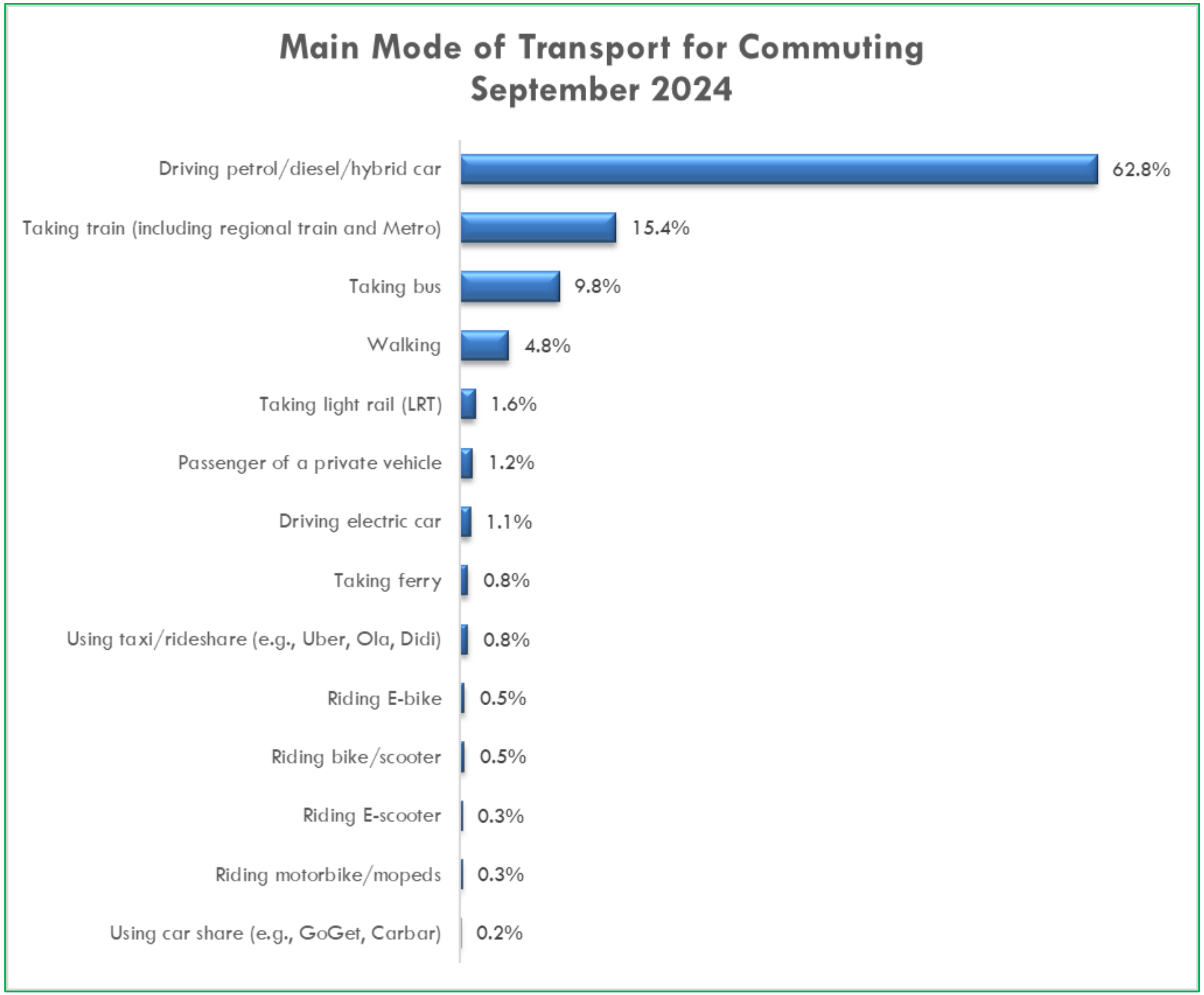
For hybrid/blended workers, except Tuesday, Wednesday and Friday, less than 60% of the hybrid workers leave home during peak hours. On Monday and Thursday, 53.9% and 57.7% of workers leave home during peak hours.



In contrast, over 60% of main office only workers leave home every weekday during peak hours. The highest percentage is for Monday, with 64.7% of office only workers leaving home during peak hours. This is an important finding suggesting that if there is also return to the office for an entire weekday, then we might expect an increase in the amount of commuting commencing in peak periods in contrast to the off-peak. Clearly, blended or hybrid workers on a particular weekday might commute throughout the day, possibly WFH early in the day and going to the office outside of peak periods, something that makes good sense in order to avoid peak traffic times.

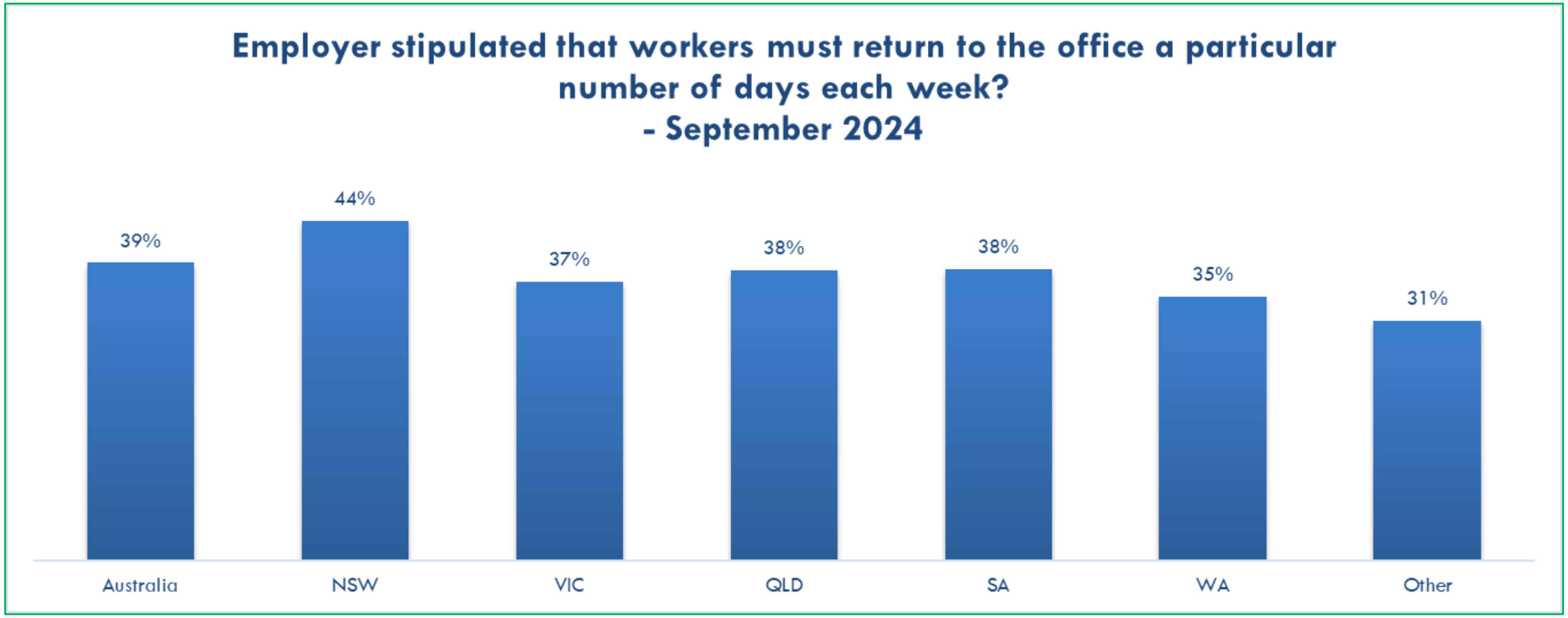


Driving any petrol/diesel/hybrid vehicle is the most dominant mode of transport for commuting at 62.8%. Taking public transport is also popular, with taking train at 15.4%, bus at 9.8%, and light rail and ferry at 1.6%. Driving an electric vehicle for commuting has a small share at 1.1%. Active modes of transport as main mode are the choices for a small percentage of commuters, with walking at 4.8%, cycling at 0.5% and using E-bike/E-scooter at 0.8%. Taxi use, rideshare, and car share for commuting have a combined mode share of 1%. Using private vehicles as a passenger has a small share of 1.2%. Driving motorbikes or mopeds is the choice for 0.3% of commuters. These figures are very close to what were observed in March 2024, with slightly higher share of bus and active modes.

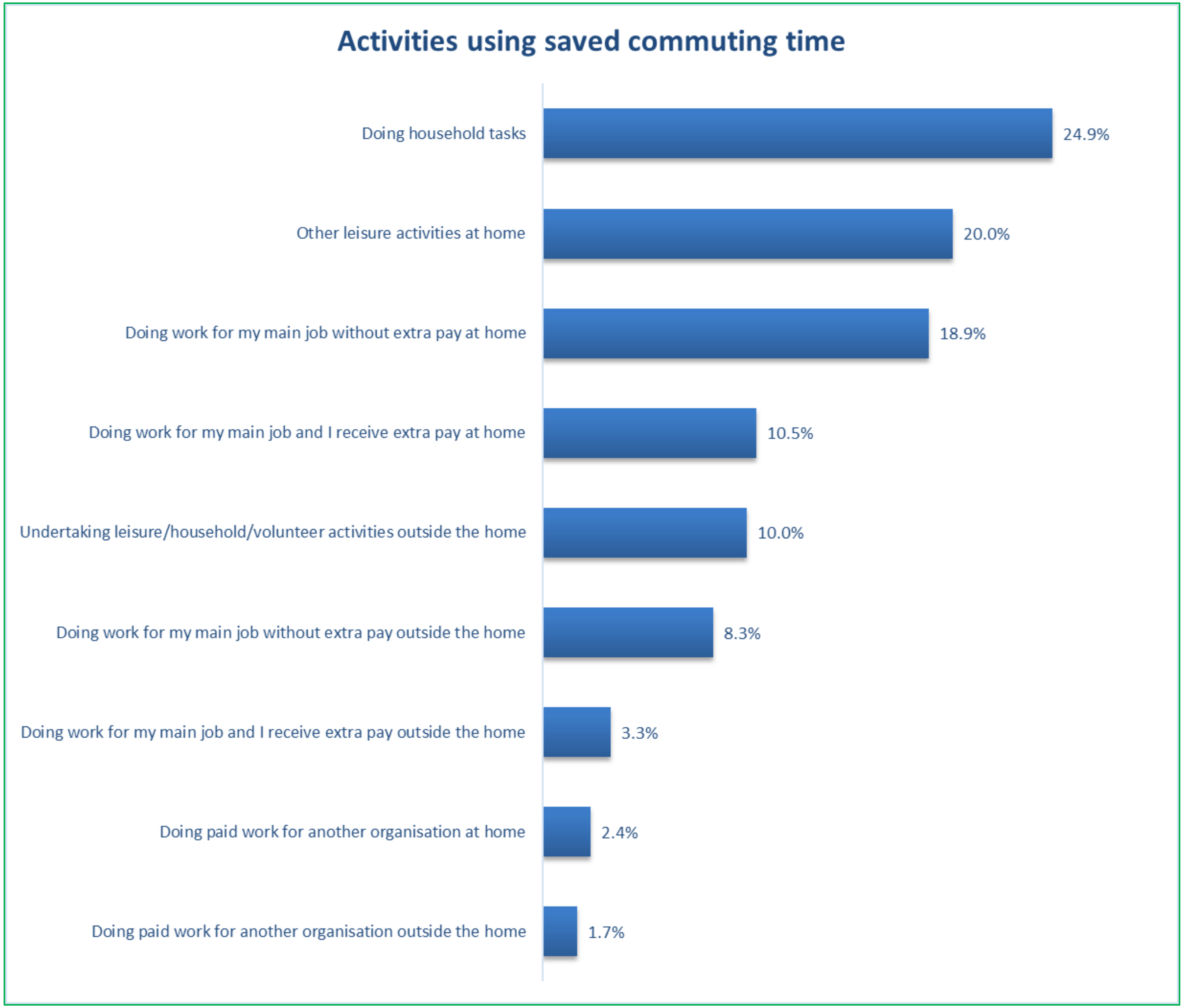


Employer, activities using saved commuting time, and estimated productivity

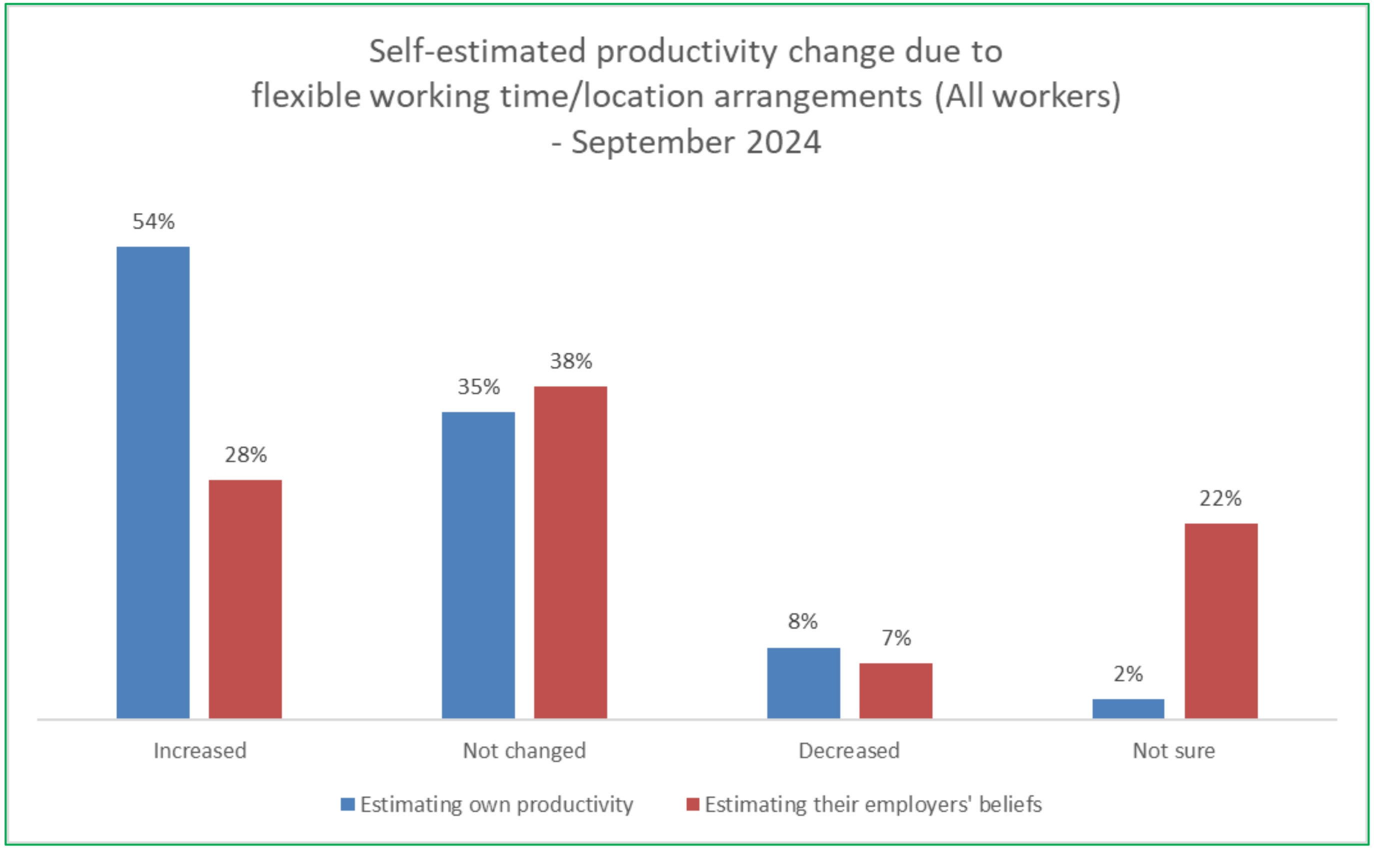
We asked whether the employer stipulated that they return to the office a particular number of days each week. About 39% of working Australians answered "yes", which is the same as in March 2024.



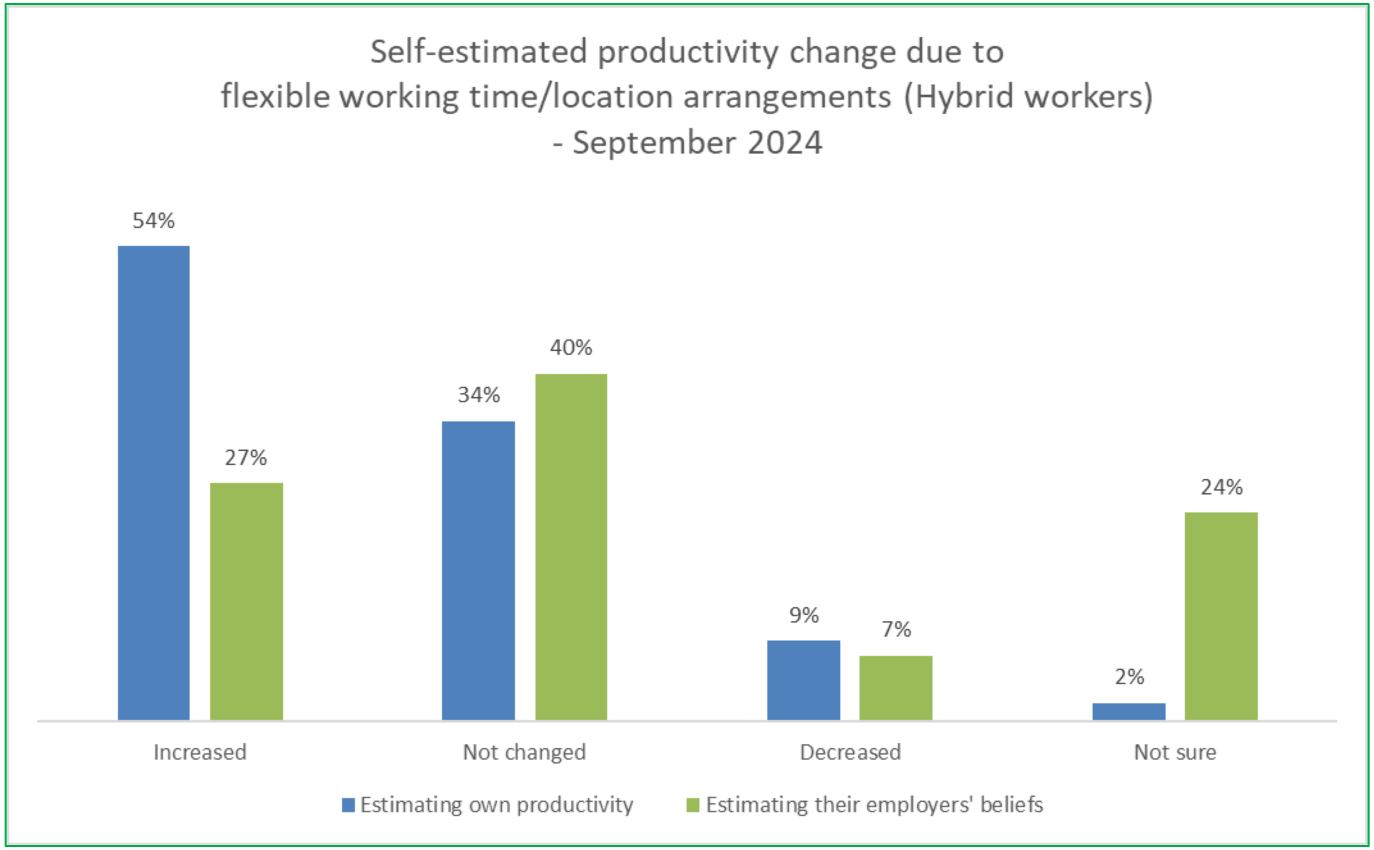
In the September 2024 survey, we added some new questions to address recent conversations in the public domain relating to flexible work arrangements. We want to know how people spend their saved commuting time due to working from home or other locations outside the main workplace. The top five activities that people spend these saved times on are: 1) doing household tasks (24.9%), 2) other leisure activities at home (20%), 3) doing unpaid work for their main job (18.9%), 4) doing work for the main job and receiving extra pay (10.5%), and 5) undertaking leisure/household/volunteer activities outside the home (10%). People spend 11.6% of combined time outside the home doing their main job with or without pay. People spend 45% of saved time working, although 4.1% points is with another organisation, and 55% on other activities.


Activities using saved commuting time
Doing household tasks
24.9%
Other leisure activities at home
20.0%
Doing work for my main job without extra pay at home
18.9%
Doing work for my main job and I receive extra pay at home
10.5%
Undertaking leisure/household/volunteer activities outside the home
10.0%
Doing work for my main job without extra pay outside the home
8.3%
Doing work for my main job and I receive extra pay outside the home
3.3%
Doing paid work for another organisation at home
2.4%
Doing paid work for another organisation outside the home
1.7%

We asked working Australians to estimate the (perceived) productivity changes due to the flexible work arrangements. About 89% of working Australians believe their productivity has either increased or not changed. We also asked *all* respondents to estimate their employers' belief in their productivity change due to flexible working arrangements. More than half (66%) of workers believe their employers would think their productivity has increased or maintained. About 22% of workers do not know what their employers think about their productivity change.



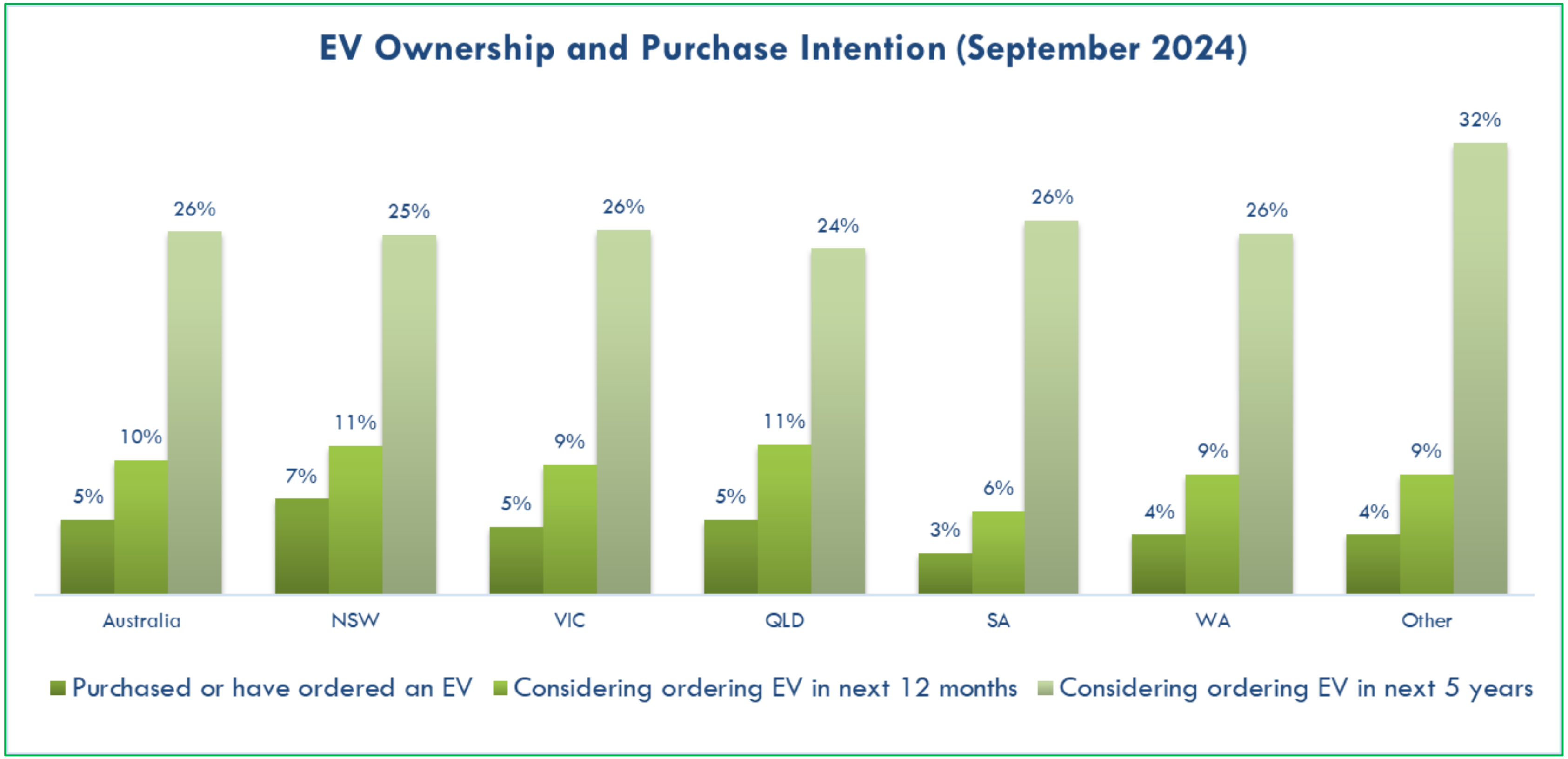
We also cross-checked with the sub-sample of 43% of hybrid workers who work in both main offices and home or other locations during the week. The results are almost identical to the responses from all workers.



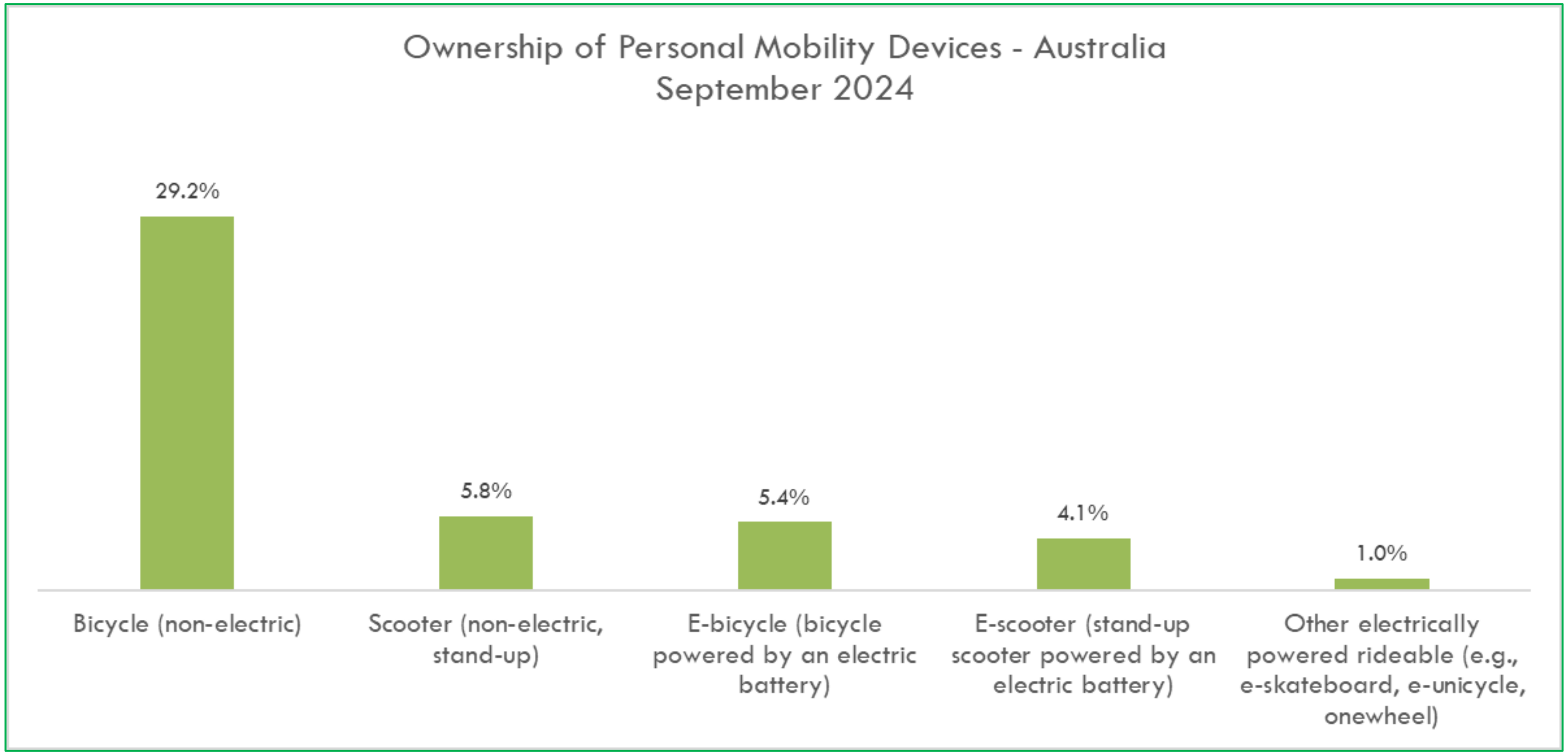
Electric vehicle and personal mobility devices

We asked Australians about their ownership status and intention to purchase an electric vehicle (EV). Among the 90% of Australians who gave an opinion, 5% have bought or ordered an EV, 10% are considering ordering an EV in the next 12 months, and 26% are considering ordering an EV in the next five years. These figures are almost identical to March 2024. In contrast, 18% of Australians are not interested, although they can afford an EV. About 41% of Australians cannot afford an EV and are not considering ordering one. As mentioned in the March 2024 report, these findings show that there is a big task to improve the affordability of EVs and convince nearly 60% of Australians that an EV is a viable option. Once the market's full potential for those who own or intend to purchase EVs has been reached, will further increases in EVs halt because of lack of interest or financial capacity for the remainder of the population? It is a question to consider for a sustainable transport future.

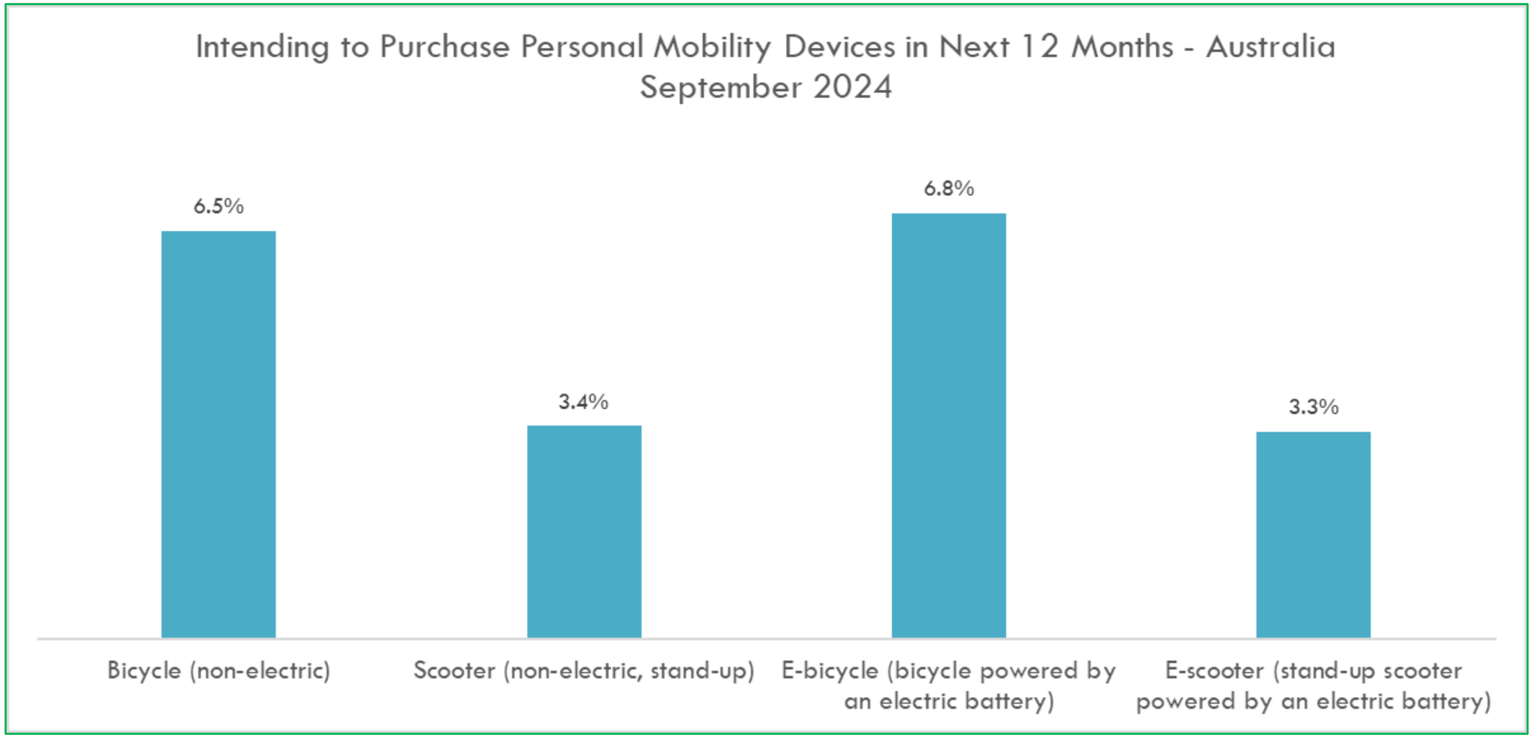
NSW residents have the highest ownership of EVs, with 7% of the residents who answered the question either owning or have ordered an EV. In other states and territories, the ownership levels are at 3% to 5%. In the next 12 months, over 10% of NSW and QLD residents intend to order an EV. Although the intention levels are high for ACT/NT/TAS residents considering EV in the next five years (32%), caution must be taken, given the small sample sizes in these states and territories.



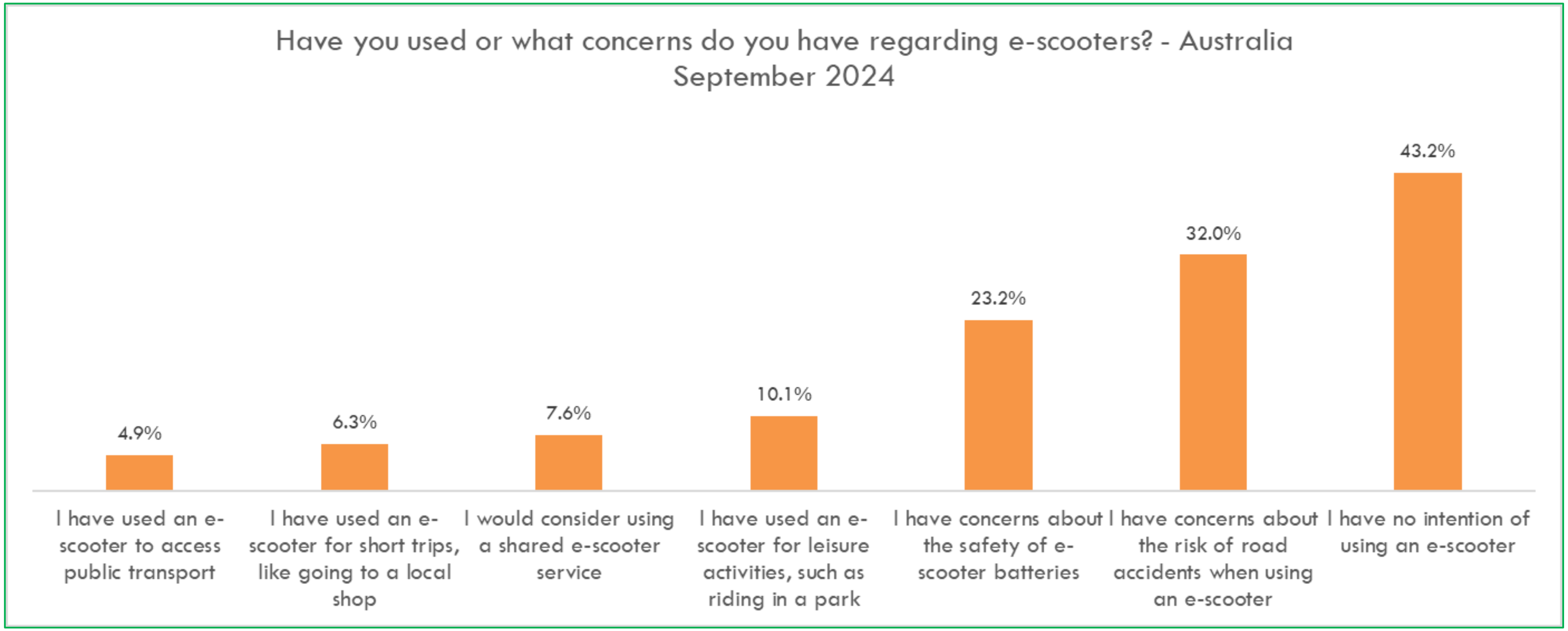
About 37% of Australian households own at least one personal mobility device, such as a bicycle, scooter, e-bike, or e-scooter. Non-electric bicycles have the highest level of ownership, at 29% of Australian households. E-bike and E-scooter have an ownership level of 5.4% and 4.1% respectively, both higher than March 2024.



Equally, 6.8% and 3.3% of Australians plan to purchase E-bikes or E-scooters in the next 12 months. Of all Australians, about 18% intend to buy a personal mobility devices, including non-electric bicycles or scooters, E-bikes, or E-scooters, higher than 13% observed in March 2024. These figures are all higher than in March 2024, showing an increasing trend and popularity of active and micro-mobility.



We asked Australians about their opinions and experience using E-scooters. About 43.2% of Australians have no intention of using one. This figure is lower than the 46% observed in March 2024, again showing an increasing trend of active and micro-mobility. However, 56.8% have used or intended to use an E-scooter. About 4.9% of Australians have used it to access public transport, 6.3% for short trips, and 10.1% for leisure activities. About 7.6% of Australians have shown interest in using shared E-scooters. However, over 32% of Australians have concerns about road safety when using an E-scooter, and about 23.2% are concerned about the safety of E-scooter batteries. These figures are similar to what have been observed in March 2024.


Have you used or what concerns do you have regarding e-scooters? - Australia September 2024
4.9%
6.3%
7.6%
10.1%
23.2%
32.0%
43.2%
I have used an e-scooter to access public transport
I have used an e-scooter for short trips, like going to a local shop
I would consider using a shared e-scooter service
I have used an e-scooter for leisure activities, such as riding in a park
I have concerns about the safety of e-scooter batteries
I have concerns about the risk of road accidents when using an e-scooter
I have no intention of using an e-scooter

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

- March 2024: March 1st – March 10th 2024
- September 2024: September 2nd – September 11th 2024

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

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