City of Melbourne
Return of Corporate Workforce
December 2020
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Executive Summary

• As a response to the COVID-19 pandemic restrictions, much of the corporate workforce located in central Melbourne were required to work from home or an alternative location for a period of time. The City of Melbourne wanted to understand the factors that would most significantly influence the decisions of this workforce to return to working in the city.

• At the time of undertaking the survey, 15% of workers had returned to the Melbourne City Precinct (Melbourne), and a further 44% were at least somewhat willing to do so, with 41% indicating some level of reluctance to returning to work in Melbourne.

• This report largely focuses on analysis of those who have returned or are willing to do so, and those who are not willing, as there are important distinctions into what can be done to encourage people to return to working in Melbourne for each of these cohorts.

• Amongst those returned, a key reason for doing so was because they were directed or required to return. The biggest barrier they had to overcome was concerns about contracting COVID, particularly on public transport.

• Those willing to return are motivated by the opportunity to socialise with their colleagues and because they generally prefer the office environment. For them, concerns about contracting COVID also feature as a barrier, as do restrictions on when they can return.

• Those unwilling to return indicated they are also motivated by the opportunity to socialise with their colleagues, but also by assurances of flexibility in working arrangements (i.e. flexible start and finish times), COVID-safe public transport, and access to parking in the city.
  • Whilst there was a small proportion of respondents unwilling to return because they preferred working from home (less than 10%), most barriers mentioned related to COVID and therefore can be addressed, for example, concerns about contracting COVID; the lack of a vaccine and concerns that others would not follow COVID-safe plans.
Executive Summary

• Assurance that businesses have COVID-safe procedures which are being followed has been the most commonly cited factor leading to people feeling safe to return to working in Melbourne.

• Over half of all respondents indicated their decision to return was largely influenced by their direct manager or the CEO of their business.

• The project involved a mixed methodology online and telephone survey, conducted in November-December 2020 with 503 adults aged 18+ who worked in the Melbourne City Precinct prior to the COVID restrictions, and were required to work from home (or another location) for a period of time during those restrictions.
Analysis
Summary Question:

*Please identify the top three things that were critical / would be critical for motivating you to return to working in Melbourne*
We asked a lot of questions about motives, barriers, and influences to encourage returning to work, and the self-identified top critical factors were relatively consistent with key findings from individual elements.

Q35. Please identify the top three things that were critical / would be critical for motivating you to return to working (part or full-time) in the Melbourne City precinct.

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503

- **Socialising with colleagues**: 23%
  - Higher for those in an office

- **Having a COVID-safe plan at work**: 21%
  - Higher for those not yet returned

- **Being directed to return / business being back open**: 19%

- **COVID-related safety on public transport**: 19%
  - Higher for those not yet or unwilling to return

- **Ensuring COVID-safe plans are followed**: 16%

- **Flexible working arrangements (i.e. flexible start and end times)**: 13%
  - Higher for those not yet or unwilling to return

- **Getting COVID under control**: 13%
  - Higher for those working in an office
Q. How willing are you to return to working at your Melbourne business location?
Over half of all respondents indicated that they had either returned (15%) or were at least somewhat willing to return (44%) – with 41% not willing to return to some extent.

**Those not willing to return were more likely to:**
- Be aged 35-49 years
- Either be married or de facto
- Be parents of school aged children
- Be employed on a full-time basis (those employed part-time were more generally more willing to return)
- Work in finance or insurance

**Compared to those who were willing to return, ‘unwilling’ group were also more likely to:**
- Have spent over $200 p/w on average in Melbourne prior to COVID-19
- Live over one hour from the Melbourne
- Have worked regularly from home prior to COVID-19

Q10. How willing are you to return to working at this business location?

Source: COM Return of Corporate Workforce study

Base: Total Respondents n=503
Q: What is motivating or would motivate you to return to working in Melbourne?
Key motives for returning to Melbourne were getting back into a routine and collaborating or socialising with others

<table>
<thead>
<tr>
<th>Motive</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routine &amp; Flexibility</td>
<td>74%</td>
</tr>
<tr>
<td>Collaboration</td>
<td>72%</td>
</tr>
<tr>
<td>Socialising</td>
<td>69%</td>
</tr>
<tr>
<td>Melbourne City</td>
<td>64%</td>
</tr>
<tr>
<td>Health &amp; Wellbeing</td>
<td>57%</td>
</tr>
<tr>
<td>Productivity</td>
<td>53%</td>
</tr>
<tr>
<td>Career</td>
<td>47%</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>44%</td>
</tr>
<tr>
<td>COVID-safety</td>
<td>25%</td>
</tr>
<tr>
<td>Directive</td>
<td>23%</td>
</tr>
<tr>
<td>Travel Incentives</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q11/Q18/Q12: What is motivating or would motivate you/motivated you to return to your workplace in the Melbourne City precinct? Are there any other things (Open ended)

Q15/Q20: Other people have mentioned the following things as being key motivators for them to return to their workplace in the Melbourne City precinct. Which of these would motivate you/also motivated your desire to return?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503
Analysis: Motivation Factors in Detail
Q11/Q18/Q12. What is motivating or would motivate you/ motivated you to return to your workplace in the Melbourne City precinct?

Are there any other things (Open ended)

Q15/ Q20. Other people have mentioned the following things as being key motivators for them to return to their workplace in the Melbourne City precinct. Which of these would motivate you/also motivated your desire to return?

Source: COM Return of Corporate Workforce study

Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208

**ROUTINE and FLEXIBILITY**

- Getting out of the house (53%)
  - Returned: 53%
  - Willing: 66%
  - Unwilling: 40%

- Getting back into a routine / feeling of ‘normal’ (44%)
  - Returned: 54%
  - Willing: 59%
  - Unwilling: 25%

- Flexible working arrangements (18%)
  - Returned: 4%
  - Willing: 10%
  - Unwilling: 32%

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**COLLABORATION**

- Work more closely with work colleagues (60%)
  - Returned: 49%
  - Willing: 74%
  - Unwilling: 50%

- Work more collaboratively (53%)
  - Returned: 43%
  - Willing: 68%
  - Unwilling: 41%

- Work more closely with clients / customers (30%)

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**SOCIALISING**

- Socialising with colleagues (68%)
  - Returned: 51%
  - Willing: 82%
  - Unwilling: 60%

- Meeting friends or family (3%)

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**MELBOURNE CITY**

- Going to cafes, etc. (44%)
  - Returned: 19%
  - Willing: 56%
  - Unwilling: 41%

- Supporting local businesses (38%)
  - Returned: 30%
  - Willing: 44%
  - Unwilling: 33%

- Enjoy the ‘buzz’ of the city (37%)
  - Returned: 20%
  - Willing: 48%
  - Unwilling: 31%

- Better access to other businesses and services (21%)
  - Returned: 9%
  - Willing: 29%
  - Unwilling: 17%

- Shopping / retail therapy (18%)
  - Returned: 7%
  - Willing: 24%
  - Unwilling: 15%

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“Very isolating been at home all the time, I miss the office environment”

“Wanting to get out of the house, change of environment”

“To maintain a normal and professional business regime”

“Flexibility in work arrangements is important”

“Would prefer a balance between work and home”

“Contact with team members both work (formal & informal interactions) and social. Online is OK but very transactional and does not allow for the sort of informal interactions where much information and work actually gets done”

“I miss not being able to converse over a white board with my colleagues to work through business work”

“Better collaboration with colleagues and customers”

“Being able to work with clients face to face”

“The social engagement with colleagues between meetings can be as important as the meetings themselves”

“Seeing work colleagues for after work drinks on Fridays”

“The in-person workplace interactions - ad hoc conversations, banter etc. not present when working at home”

“Social interaction with friends”

“Lots of outdoor dining and drinking options”

“The coffee is better in the city”

“I want to support the businesses in the city, esp. my usual morning café”

“Melbourne is an exciting place to be”

“Having access to city facilities is an essential part of his business”

“I have previously preferred to shop in person rather than online so getting back to the shops will be nice”

Q11/18/12. What is motivating or would motivate you/ motivated you to return to your workplace in the Melbourne City precinct? Are there any other things (Open ended)

Q15/ Q20. Other people have mentioned the following things as being key motivators for them to return to their workplace in the Melbourne City precinct. Which of these would motivate you/also motivated your desire to return?

Source: COM Return of Corporate Workforce study

Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208
Q11/Q18/Q12. What is motivating or would motivate you/ motivated you to return to your workplace in the Melbourne City precinct?

Are there any other things (Open ended)

Q15/ Q20. Other people have mentioned the following things as being key motivators for them to return to their workplace in the Melbourne City precinct. Which of these would motivate you/also motivated your desire to return?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208

**HEALTH and WELLBEING**
- Separating work and home life (48%)
  - Returned 50%
  - Willing 60%
  - Unwilling 33%
- Improving my mental health (33%)
  - Returned 43%
  - Willing 40%
  - Unwilling 22%

**PRODUCTIVITY**
- Being in a more creative environment (34%)
  - Returned 28%
  - Willing 43%
  - Unwilling 26%
- Increasing personal productivity (24%)
  - Returned 41%
  - Willing 33%
  - Unwilling 10%
- Less distractions at work (18%)
  - Returned 26%
  - Willing 21%
  - Unwilling 13%
- Prefer the office (12%)
  - Returned 9%
  - Willing 20%
  - Unwilling 4%

**CAREER**
- Keeping up with changes in the organisation (30%)
- Better career advancement opportunities (13%)
- Returning to previous income levels (13%)
  - Returned 22%
  - Willing 10%
  - Unwilling 13%
- Increased job security (11%)

**INFRASTRUCTURE**
- Better materials / equipment at work (33%)
  - Returned 42%
  - Willing 40%
  - Unwilling 22%
- Better IT support / infrastructure at work (26%)
  - Returned 30%
  - Willing 32%
  - Unwilling 19%

*“Separation of home from work” “Mental health”*
*“More energetic and stimulating environment” “To be productive without distraction” “Work from home is interrupted by family needs, affecting productivity” “I loved where I worked. I enjoyed the CBD”*

“To access the printer (my work involves reviewing and drafting very large confidential agreements which has been very difficult to do without access to bulk printing)”

“Can get a promotion rather than working at home where no one knows where you’re at”
“After 8 months of being stood down would be getting a decent pay check again”
Q11/Q18/Q12. What is motivating or would motivate you/ motivated you to return to your workplace in the Melbourne City precinct?

Q15/ Q20. Other people have mentioned the following things as being key motivators for them to return to their workplace in the Melbourne City precinct. Which of these would motivate you/also motivated your desire to return?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208
Amongst those returned, routine and collaboration were still strong motivators, but so were health, productivity and being directed to return.
Amongst those willing to return collaboration and routine were even more prominent, with socialising and accessing services within Melbourne also key motivating factors.
For those unwilling to return, they were less motivated by collaboration, socialisation, health or productivity than others, and more motivated by assurances of safety from COVID-19, and incentives relating to travel and parking.

Q11/Q18/Q12. What is motivating or would motivate you/ motivated you to return to your workplace in the Melbourne City precinct? Are there any other things (Open ended)
Q15/ Q20. Other people have mentioned the following things as being key motivators for them to return to their workplace in the Melbourne City precinct. Which of these would motivate you/also motivated your desire to return?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208
Q. What barriers or problems, if any, will need to be overcome before you will be ready to return / still causes you some concern about having returned to working in Melbourne?
Key barriers to be overcome to help people feel ready to return include ensuring that COVID-safe practices exist and will be followed at work and in the office, as well as concerns about travel and parking.

Q13. What barriers of problems, if any, will need to be overcome before you will be ready to return to your workplace in the Central Melbourne precinct? Q14. Are there any other barriers you want to mention? (Open ended) Q19. What, if anything, still causes you some concern about having returned to working at your workplace in the Melbourne City precinct? (Open ended) Q16/Q21. Which of these would impact on your decision to return to work / did you consider when making your decision to return to work?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503
Analysis: Barriers in Detail
Q13. What barriers of problems, if any, will need to be overcome before you will be ready to return to your workplace in the Central Melbourne precinct?

Q14. Are there any other barriers you want to mention? (Open ended)

Q19. What, if anything, still causes you some concern about having returned to working at your workplace in the Melbourne City precinct? (Open ended)

Q16/Q21. Which of these would impact on your decision to return to work / did you consider when making your decision to return to work?

Source: COM Return of Corporate Workforce study

Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208

COVID-SAFE IN PUBLIC

- COVID transmission on public transport (62%)
  - Returned 41%
  - Willing 61%
  - Unwilling 71%

- COVID-safe plans not followed by others (49%)
  - Returned 30%
  - Willing 47%
  - Unwilling 58%

- Crowded spaces (49%)
  - Returned 30%
  - Willing 47%
  - Unwilling 58%

- Others not wearing masks (49%)

- Cleanliness of public spaces (39%)

- Fear of another wave of COVID (13%)

- Vaccine availability (9%)
  - Returned -%
  - Willing 7%
  - Unwilling 13%

TRAVEL / PARKING

- Increased travel time (70%)
  - Returned 51%
  - Willing 65%
  - Unwilling 81%

- Road congestion (37%)
  - Returned 41%
  - Willing 30%
  - Unwilling 43%

- Availability of parking (26%)
  - Returned 19%
  - Willing 19%
  - Unwilling 35%

- Reliability of public transport (5%)

COVID-SAFE AT WORK

- Not wanting to wear a mask all day (51%)
  - Returned 26%
  - Willing 54%
  - Unwilling 57%

- Physical workplace environment (e.g. ventilation, hot desking) (40%)
  - Returned 15%
  - Willing 38%
  - Unwilling 50%

- Others not wearing masks (39%)
  - Returned 26%
  - Willing 33%
  - Unwilling 49%

- High density environment (38%)
  - Returned 20%
  - Willing 33%
  - Unwilling 49%

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“Having to wear a mask all day in office would be unpleasant”

“Office needs a new floorplan and general expansion of space”

“Capacity of work environment for appropriate social distancing / work out how to do calls from desks - to prevent sound pollution - lots more meeting rooms or work appropriate spacing”

“Workable solution for lifts. If many people return, cannot spend hours waiting for a lift due to social distancing”

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“I’m a bit concerned about public transport, as I do not like to drive into the CBD. I’m hoping it will remain easy to social distance on trains but believe this will be harder as more people return to work”

“The general population need to demonstrate a serious understanding of the COVID safe practices”

“No mass congregations like use to happen on the streets, shops, etc.”

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“The current length of the commute. When time can be saved achieving the same thing from home”

“Traffic management, congestion and travel time - Princes highway is a crucial route to workplace, congestion or road delays are very disruptive and inconvenient (double travel time)”
<table>
<thead>
<tr>
<th><strong>LACK OF FLEXIBILITY</strong></th>
<th><strong>COSTS</strong></th>
<th><strong>WORK ENVIRONMENT</strong></th>
<th><strong>DENSITY RESTRICTIONS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss of extra time to myself (52%)</td>
<td>Extra costs associated with working in Melbourne (49%)</td>
<td>More productive at home (36%)</td>
<td>Restrictions prevent their return (9%)</td>
</tr>
<tr>
<td>Returned 32%</td>
<td>Returned 28%</td>
<td>Returned 14%</td>
<td>Returned -%</td>
</tr>
<tr>
<td>Willing 45%</td>
<td>Willing 46%</td>
<td>Willing 28%</td>
<td>Willing 17%</td>
</tr>
<tr>
<td>Unwilling 67%</td>
<td>Unwilling 60%</td>
<td>Unwilling 52%</td>
<td>Unwilling 4%</td>
</tr>
<tr>
<td>Used to working from home (47%)</td>
<td>Costs of parking (28%)</td>
<td>Colleagues have not returned (25%)</td>
<td>Limitations on numbers in the office (3%)</td>
</tr>
<tr>
<td>Returned 15%</td>
<td></td>
<td>Returned 9%</td>
<td></td>
</tr>
<tr>
<td>Willing 38%</td>
<td></td>
<td>Willing 24%</td>
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<tr>
<td>Unwilling 69%</td>
<td></td>
<td>Unwilling 31%</td>
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<tr>
<td>Lack of flexible work hours (40%)</td>
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<td>More stressful at work (18%)</td>
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<tr>
<td>Returned 18%</td>
<td></td>
<td>Returned 19%</td>
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<tr>
<td>Willing 30%</td>
<td></td>
<td>Willing 8%</td>
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<tr>
<td>Unwilling 60%</td>
<td></td>
<td>Unwilling 30%</td>
<td></td>
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<tr>
<td>Prefer to work from home (7%)</td>
<td></td>
<td>IT infrastructure is better at home (9%)</td>
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<tr>
<td>Lack of flexible work days (3%)</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

“Cost of parking, tolls, petrol. Saving so much from working at home”
“Finding cheap, safe and reliable parking areas near my workplace”
“Although I prefer to use public transport… more affordable parking would be a positive step to encourage people into the CBD”

“If more people return”

Q13. What barriers of problems, if any, will need to be overcome before you will be ready to return to your workplace in the Central Melbourne precinct? Q14. Are there any other barriers you want to mention? (Open ended) Q19. What, if anything, still causes you some concern about having returned to working at your workplace in the Melbourne City precinct? (Open ended) Q16/Q21. Which of these would impact on your decision to return to work / did you consider when making your decision to return to work?

Source: COM Return of Corporate Workforce study

Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208
Barriers still causing concern to those who have returned followed the same trend as the overall results, but were far less prominent, particularly regarding workplace flexibility.

Q13. What barriers of problems, if any, will need to be overcome before you will be ready to return to your workplace in the Central Melbourne precinct? Q14. Are there any other barriers you want to mention? (Open ended) Q19. What, if anything, still causes you some concern about having returned to working at your workplace in the Melbourne City precinct? (Open ended). Q16/Q21. Which of these would impact on your decision to return to work / did you consider when making your decision to return to work?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503, Returned to Melbourne n=74
Biggest barriers for those willing to return were restrictions preventing their return, being assured that their workplace would be COVID-safe, and potential loss of more flexible working arrangements.
For those unwilling to return, almost all barriers were felt more strongly than for others, with the most commonly cited barriers relating to a mix of COVID related concerns, and concerns about not wanting to increase their travel time or lose their current level of work flexibility.
Q. What would / did it take for you to feel confident and safe to return to work in Melbourne?
Across all groups, having COVID-safe plans in place was most likely to make people feel safe and confident to return – with both the returned and unwilling group motivated by elements linked to the absence of COVID in the community.

Q17. If your organisation asked you to return to work, what would it take for you to feel confident and safe to do so?

Q22. When you returned to work, what key things made you feel confident and safe to do so? Please specify

Source: COM Return of Corporate Workforce study

Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208
Q17. If your organisation asked you to return to work, what would it take for you to feel confident and safe to do so?

Q22. When you returned to work, what key things made you feel confident and safe to do so? Please specify

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208

<table>
<thead>
<tr>
<th>COVID-SAFE PLANS</th>
<th>NO COVID</th>
<th>SAFE OFFICE</th>
<th>FLEXIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having a COVID-safe plan in place (22%)</td>
<td>- Vaccine available (7%)</td>
<td>- Limited numbers returning to work (5%)</td>
<td>- Flexible work day options (7%)</td>
</tr>
<tr>
<td>Returned 30%</td>
<td>- Returned 1%</td>
<td>- Enough space in the workplace (3%)</td>
<td>- Flexible hours (5%)</td>
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<tr>
<td>Willing 24%</td>
<td>- Willing 3%</td>
<td>- Not having to hot desk (2%)</td>
<td></td>
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<tr>
<td>Unwilling 18%</td>
<td>- Unwilling 14%</td>
<td>- Access to stairs / elevators (2%)</td>
<td></td>
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<tr>
<td>Others following the COVID-safe plan (13%)</td>
<td>- Low / no active cases (7%)</td>
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<tr>
<td>Social distancing (9%)</td>
<td>- Returned 16%</td>
<td></td>
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<tr>
<td>Wearing masks (6%)</td>
<td>- Willing 5%</td>
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<tr>
<td>Returned 14%</td>
<td>- Unwilling 5%</td>
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<tr>
<td>Willing 3%</td>
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<tr>
<td>Unwilling 6%</td>
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<tr>
<td>Regular, thorough cleaning (6%)</td>
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<td>Availability and use of PPE and good hygiene practices (3%)</td>
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<td>Having sufficient information / communication (2%)</td>
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<tr>
<td>NO COVID</td>
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<td>Safe office</td>
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<tr>
<td>FLEXIBILITY</td>
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<tr>
<td>Flexible work day options (7%)</td>
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<td>Flexible hours (5%)</td>
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<tr>
<td>TRAVEL SAFETY</td>
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<tr>
<td>COVID-related safety on public transport (7%)</td>
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<tr>
<td>Safe alternative transport methods (4%)</td>
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<tr>
<td>TRAVEL EASE AND COSTS</td>
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<tr>
<td>Parking availability (3%)</td>
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Q. How many days per week do you anticipate working in Melbourne?

Q. How frequently did you / do you wish to work from home?
COVID has seen a desire from employees for a more flexible working arrangement moving forward

Q30/Q31. You said that you have returned / When you return to working in the Melbourne City Precinct, how many days per week are you doing this? / do you anticipate this would be?

Q29. Before COVID-19, how frequently did you work from home?

Q32. Which of the following best describes you?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503

Pre-COVID work from home frequency
- Routinely - I had a flexible work agreement and regularly worked from home
- Occasionally - I worked from home on an as-needs basis
- I rarely or never worked from home

Current / anticipated number of days

Preferred work from home frequency
Q. How long is your commute to work in Melbourne, and how did / do you usually travel?
Post COVID-19 travel will see a slight shift in people favouring personal cars over public transport.

**Average travel time (one-way)**
- Less than 15 minutes: 5%
- 15 minutes to under 30 minutes: 23%
- 30 minutes to under an hour: 48%
- One hour to under 2 hours: 23%
- 2 hours or more: 1%

**Pre-COVID and current/ anticipated travel mode**
- Train: 53% (Pre-COVID), 62% (Current/Anticipated)
- Tram: 21% (Pre-COVID), 14% (Current/Anticipated)
- Bus: 6% (Pre-COVID), 7% (Current/Anticipated)
- Personal car: 31% (Pre-COVID), 25% (Current/Anticipated)
- Car-pooling: 1% (Pre-COVID), 1% (Current/Anticipated)
- Motorcycle/scooter: 2% (Pre-COVID), 1% (Current/Anticipated)
- Walk/run: 11% (Pre-COVID), 11% (Current/Anticipated)
- Bicycle: 12% (Pre-COVID), 9% (Current/Anticipated)
- Taxi/Uber/ride-share: 1% (Pre-COVID), 1% (Current/Anticipated)
- Other: 3% (Pre-COVID), 2% (Current/Anticipated)

Q28. On average, how long is your commute to work in the Melbourne City Precinct (one way)?
Q25./Q26./Q27. Before COVID-19, how did you usually travel / How are you currently travelling / How do you anticipate travelling to work in the Melbourne City Precinct?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503
Q. Approximately how much money, excluding travel costs, did you spend / do you anticipate spending in Melbourne?
23% of respondents spent over $100 per week in Melbourne prior to COVID. It is anticipated that this proportion will drop to 15% post-COVID.

Q23/Q24. Prior to COVID-19, approximately how much money, excluding travel costs, did you spend / do you anticipate spending in the Melbourne City Precinct?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503, Returned to Melbourne n=74, Willing to return n=221, Not willing to return n=208

For Returned and Willing, those spending $100-$200 p/w most likely to anticipate a decrease
For Unwilling, those spending over $200 p/w most likely to anticipate a decrease
Appendix
Our Approach

**Methodology**
An online Computer-Assisted Web Interviewing (CAWI)
Computer-Assisted Telephone Interviewing (CATI)

**Target Audience**
Victorians, aged 18 and over who worked in the Melbourne City Precinct prior to COVID-19 restrictions, and were required to work from home for some period during those restrictions

**Sample Size & Source**
N = 503 respondents sourced from Roy Morgan's Ozpanel.

**Questionnaire Length**
Average length of survey =
16 minutes for CAWI survey
20 minutes for CATI survey

**Timing**
27 November – 10 December, 2020
Methodology and Sample Profile
Methodology

• This was a mixed methodology project, with the survey being conducted both online (Computer-Assisted Web Interviewing, CAWI) and via telephone (Computer-Assisted Telephone Interviewing, CATI).

• The fieldwork period was from 27 November to 10 December, 2020.

• The questionnaire included approximately 45 questions per person (including 25 screener and demographic questions) and took approximately 16 minutes to complete via CAWI and 20 to complete via CATI. This is not uncommon for a CATI survey to run slightly longer than a CAWI survey, as questions and responses need to be spoken.

• The sample was sourced from the Roy Morgan Consumer Panel, a database of nearly 1,000,000 Australians predominantly sourced from Roy Morgan Single Source, our proprietary survey of over 50,000 nationally representative personal interviews annually based on an addressed based random probability clustered sample frame.

• A total of 503 interviews were achieved.

• The survey was hosted and managed by Roy Morgan.
Sample Profile

- 38.6% female
- 60.6% male
- 0.4% other
- 0.4% prefer not to say

Age

- 2% (8) 18-24
- 15% (73) 25-34
- 42% (210) 35-49
- 34% (172) 50-64
- 8% (38) 65+
- 0% (2) Prefer not to say

Income

- 1% (3) Less than $20,000
- 6% (28) $20,000 to $49,999
- 10% (48) $50,000 to $69,999
- 20% (101) $70,000 to $99,999
- 26% (133) $100,000 to $149,999
- 23% (115) $150,000+
- 15% (75) Can't Say/Prefer not to answer

- 2.4% Melbourne City
- 93.8% Greater Melbourne
- 3.8% VIC - other
Sample Working Situation

Questions:

Q37. Are you currently receiving JobKeeper payments as part of your wage?  
Q1. Are you currently working full-time or part-time/casual or stood-down but still employed?  
Q3. Before the COVID-19 restrictions, were you working in or around the Melbourne City precinct at least some of the time?  
Q5. Are you currently mainly working from home or at a business/office location?  
Q6. And are you currently mainly working inside the Melbourne City precinct or elsewhere?  
Q7. Prior to COVID-19, which of the following best reflects your organisation’s work environment?  
Q42. Do you work in the public service, private industry or Not For Profit?  
Q8. Is your workplace in the Melbourne City precinct currently open or closed?

Source: COM Return of Corporate Workforce study
Base: Total Respondents n=503