

The commute has changed – but the car is still relevant

An inside look at Australia's transportation trends

A significant shift in commuter behaviour has taken place over the last few years. We've moved away from traditional full-time office work.

Local governments are advocating for bicycle and public transport use through guideline implementation and road infrastructure changes.

Yet despite this, the car remains the most popular choice due to its flexibility and convenience.

Understanding commuter behaviour

Traditional full-time office work has given way to hybrid alternatives.

Today, flexibility extends beyond merely coming into the office a few days per week. Many commuters now enjoy the freedom to arrive and leave at different times throughout the day.

As a result, we're seeing:

- A change in peak hours (extending beyond the usual 8-9am times)
- More diverse driving patterns
- Increased demand for flexible parking options

This is what current workplace arrangements look like for staff:



58%

Have hybrid work schedules



35%

Have full-time remote work schedules



87%

Choose flexible work schedules when offered

Modern work options are more appealing than ever:

- 66% of HR leaders provide a hybrid work model (and 30% are planning to adopt one)²
- Companies without a hybrid offering increase the risk of employees leaving by 12%³

Here's a snapshot of commuter behaviour heading into Australia's major CBDs:⁶



58%

Drive into the CBD for work



70%

Travel to the CBD one to three times per week



46%

Can choose when they get to or leave the office



Tuesdays, Wednesdays and Thursdays are the most popular days to drive into the CBD

Monday and Friday are down 21% and 20% in comparison⁵



With the change in commute no longer being five days per week, people prefer the convenience of their car over public transport.

Despite an upturn in public transport, Transport use in NSW remains 16% lower than pre-COVID.⁴

Flexible working has changed the game

The majority of today's commuters:

- Travel to the office only 1-3 days per week
- Have varying start and end times
- Prefer to drive rather than use public transport

The car is the best option for many due to the accessibility and convenience it provides.



Sources: 1. McKinsey & Company data 2023 2. & 3. Garter 39-percent-of-global-knowledge-workers-will-work-hybrid-by-the-end-of-2023 4. NSW Public Transport data 2023 5. Wilson Parking Customer and Transaction Data 2023 6. Wilson Parking Household Survey 2023

Jugglers

The rise of a new demographic within the market

With the shift towards flexible working, a new demographic known as ‘jugglers’ has emerged.⁵

These are individuals who use the commute to complete other daily tasks.

Meet the ‘juggler’ demographic with these example personas:



Sarah

- I drive to the CBD for work on Tuesday, Wednesday and Thursday
- On Tuesday morning I do my early online meeting from home, before driving into the office
- On Wednesday evening, I coach junior basketball after hours, so I head straight to the court after work, then pick-up dinner on the way home

My main concern:

I want quick and easy parking so I can get more done on my driving days.



Greg

- I drive to the office on Monday and Tuesday
- On these days, I drop my children off at day care on the way. And I leave the office in time to pick them up at 4pm
- I stop by the supermarket on the trip home. Once I get back, I log on to finish my work

My main concern:

I want flexible parking at different times throughout the day.

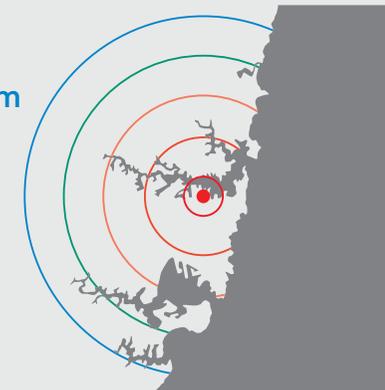
From dropping off and picking up children, to stopping by the supermarket on the way home from work, they rely on the convenience of their car.

‘Jugglers’ differ from traditional, 9-5 commuters and even hybrid home/office workers. They want to take advantage of their adaptable schedule to manage other priorities in life.

On average commuters travel 25 kms each way to get to work.

This means the accessibility of their car is crucial. And for jugglers, it gives them the opportunity to complete multiple tasks along the way.⁴

25km



34%

of commuters are likely to make stops on the way to or from work

28%

of commuters travel with children some or all the way

15%

of commuters pick passengers up or drop them off at some point

Understanding ‘jugglers’

It’s important to offer parking solutions that account for people like Sarah and Greg. Both rely on flexible parking to suit their hybrid work schedule.

They want:

- Affordable parking options
- Fast, reliable and convenient access
- The freedom to come and go as they need

Providing the above will draw traditional and modern commuters back to the office.



The challenge:

How can the commute and parking be made easier?

Commuters face a number of obstacles. Each one makes their driving experience stressful. As a result, they're less likely to drive to the office.

These are their top concerns:



Proximity

They want to find a car park close to the office

- 69% of commuters believe there are not enough car parks available⁶
- And 57% are concerned there will be no parking spots available close to their office⁷



Security

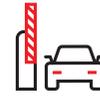
They want their vehicle to be safe and secure



Costs

They want a solution to high parking and fuel prices

Parking behaviour at a glance



62% of potential customers pay for parking and park in the same car park 'most of the time'⁶



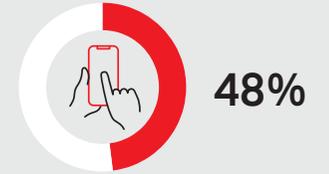
Flexible parking options purchased increased by 128% since the COVID-19 pandemic⁵



67% of potential customers don't drive to work due to the perceived cost of parking⁶



And 40% of potential customers don't drive to work due to the increasing fuel costs⁶



Commuters also want to manage their parking remotely, using their smart device. In fact, 48% of drivers would like to use their phone to **handle the entire process.**

They're asking for ...

✓ MORE

- Convenient access to bays
- Fast, seamless booking options
- Smooth digital experiences
- Flexibility to come and go

✗ LESS

- Rigid, 9-5 parking rules
- Manual payment machines
- Printed tickets
- Chaotic parking lots

Let's make driving to work more appealing

The office commute is the second most common source of workplace stress.⁸

So it's important to offer convenient, flexible and affordable parking. Doing so will ensure that more people feel comfortable driving to the office on their required days.

Sources:

7. The National Roads and Motorists' Association Limited 2023

8. The American Psychological Association 2023

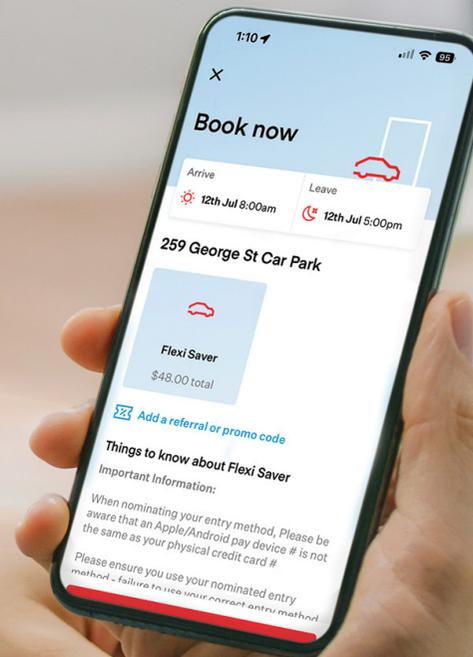
The power of digital parking solutions

Modern parking solutions tackle commuter concern head on.

For instance, new apps offer true convenience and value. That's why they're growing more and more popular, with downloads increasing by **364%** over the last three years.⁶

Public apps for off-street parking provide:

- Easy ways for commuters to find, book and access parking
- A channel to deliver flexible parking options
- Value through the inclusion of preferential pricing, bundle discounts and reward programs
- Improved commuter engagement and loyalty



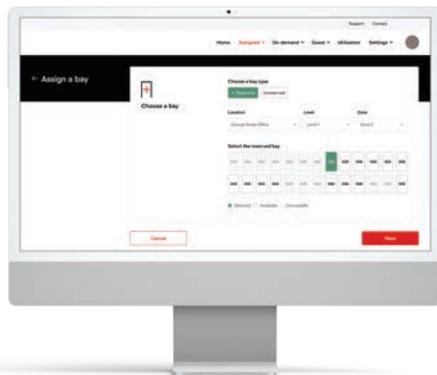
Tenant parking management

For tenants looking to self-manage their staff parking, specialist digital solutions are a powerful tool. They provide support for businesses that want to manage flexible working and encourage people back to the office.



Platforms vary but the majority will offer:

- An administration portal that allows parking managers to efficiently manage, allocate and assign spaces
- Seamless entry and exit for staff and guests, without the hassle of managing access cards
- Connection to existing parking equipment
- Reporting and insights platform to better forecast for future allocations



With the right technology in place, delivering the parking experience customers demand is simple.

One-minute recap

Hybrid working is likely here to stay
70% only travel to the CBD one to three times per week ⁶

Growth of tenant parking management
Companies look to manage parking capacity with flexible office work schedules

Convenience of the car is crucial
Allows for greater flexibility and for 'jugglers' to do more with their commute

Top 3 factors when selecting a car park

48% want to manage their parking via a smart device ⁵

Factor	Relative Importance
Proximity	High
Security	Medium
Cost	Low