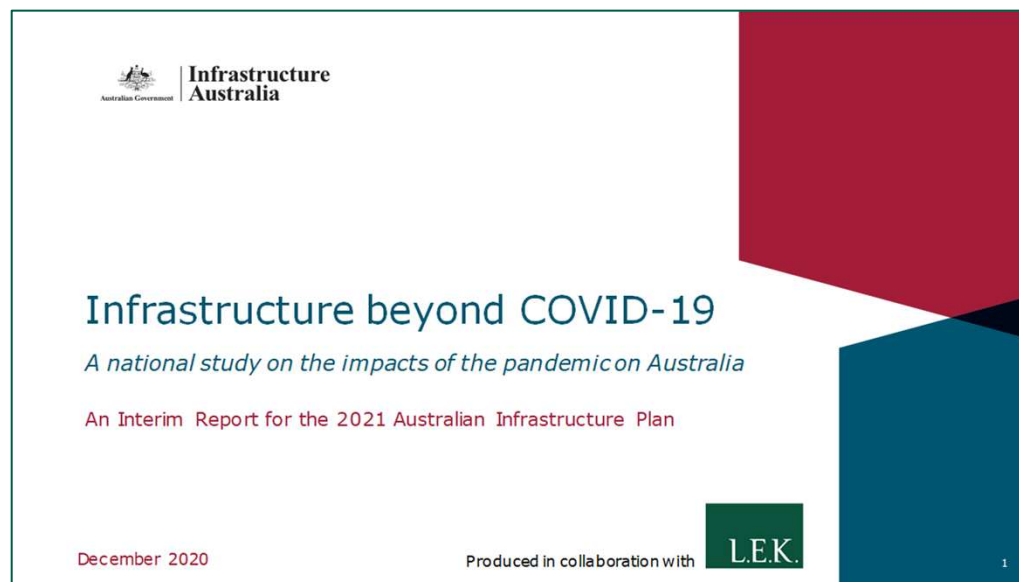# Introduction

Simon Barrett,
Partner L.E.K
Consulting
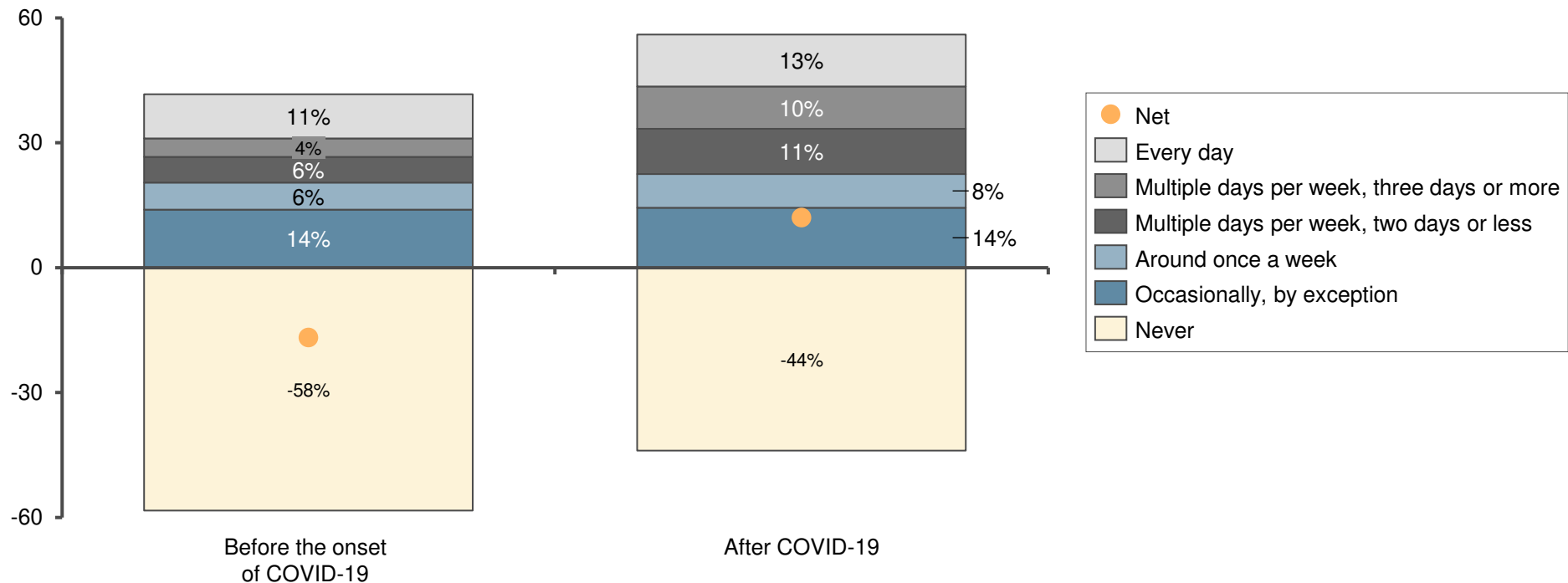
Almost a third of Australia's workforce worked from home during the pandemic, with a third of these hoping to continue post COVID-19

Intention to work from home, before vs after COVID-19
(Survey taken November 2020)
Percent of respondents (N=1,531)

Before the onset
of COVID-19

After COVID-19

Legend:
- ● Net
- Every day
- Multiple days per week, three days or more
- Multiple days per week, two days or less
- Around once a week
- Occasionally, by exception
- Never

Before the onset of COVID-19:
- 11%
- 4%
- 6%
- 6%
- 14%
- -58%

After COVID-19:
- 13%
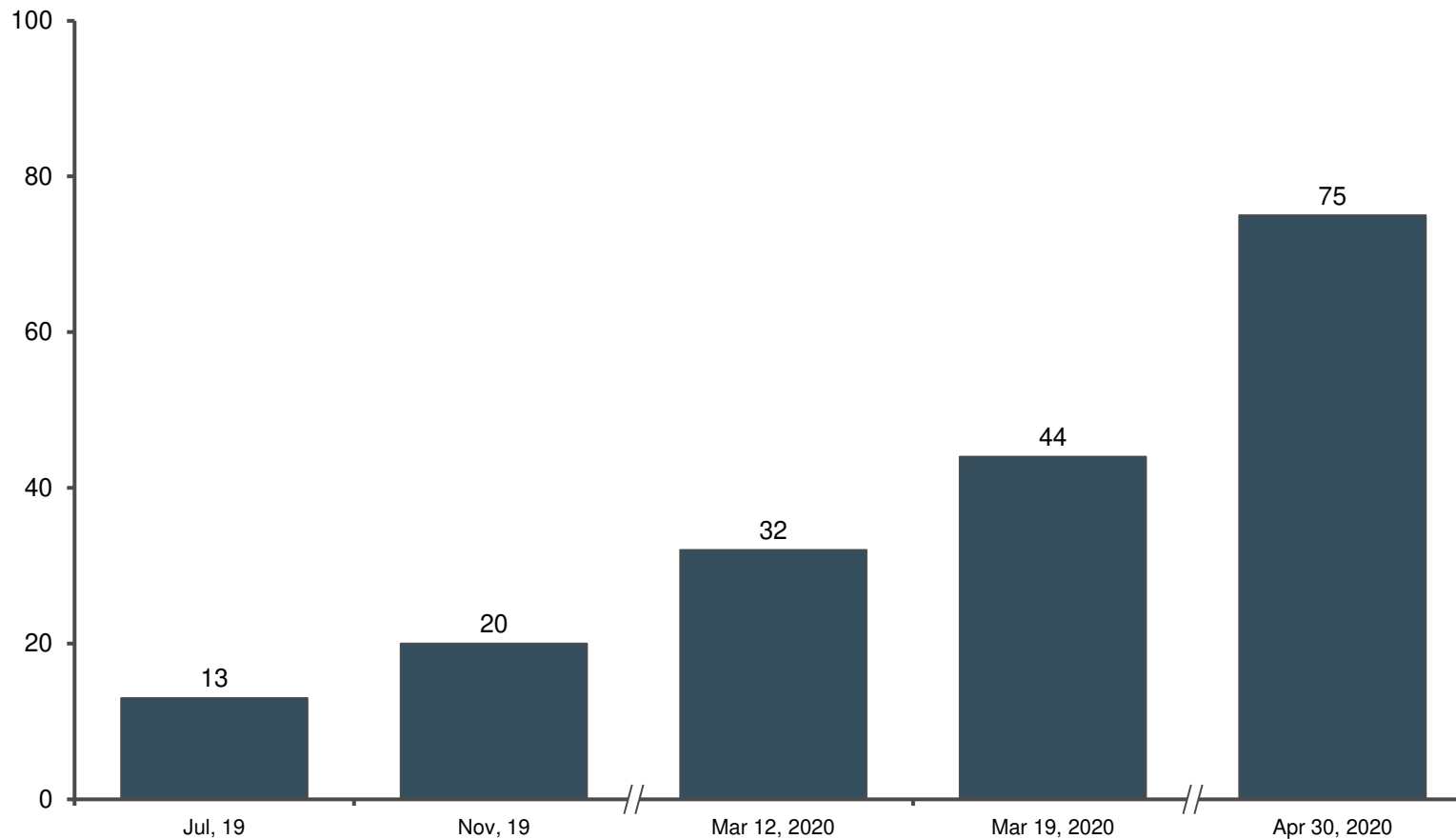- 10%
- 11%
- 8%
- 14%
- -44%

Note: * Post-COVID-19 responses excluding those who answered N/A in their pre-COVID-19 responses
Source: L.E.K. Consumer Survey (November 2020; N=1,531);

L.E.K.

The COVID-19 lockdowns significantly accelerated the uptake of online collaboration tools by businesses

**Daily active users of Microsoft Teams worldwide
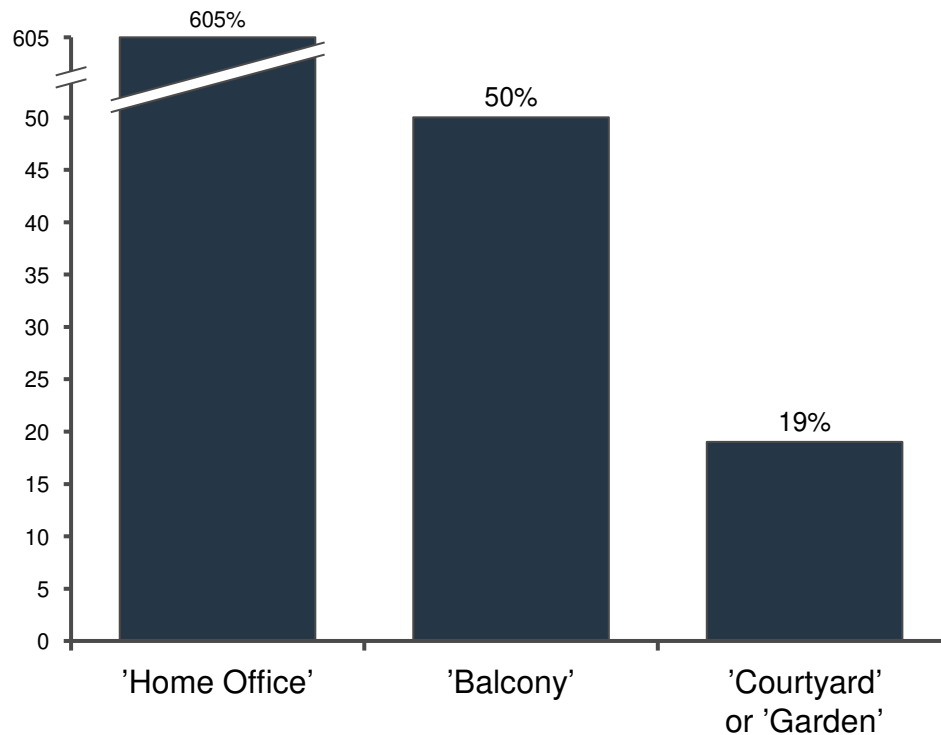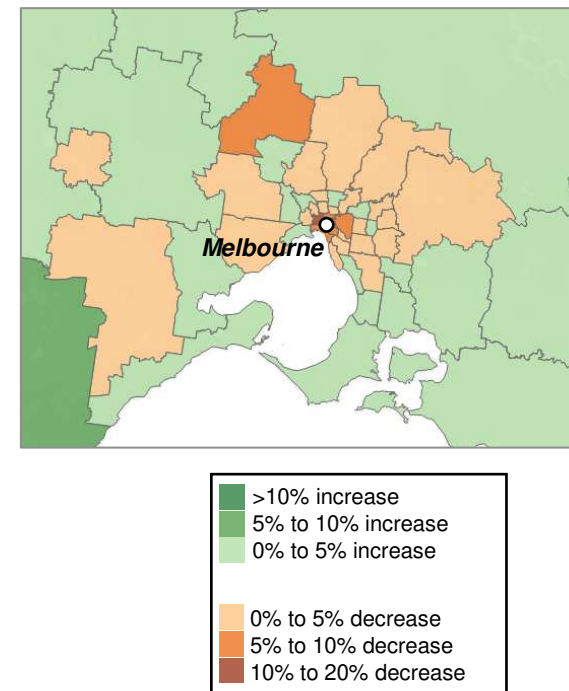(Jul 2019 – Apr 2020)**
Millions

L.E.K.

There has been a significant shift in where and how people want to live

Change in key word frequency in house search criteria (Jun-2020 vs Mar-2020)
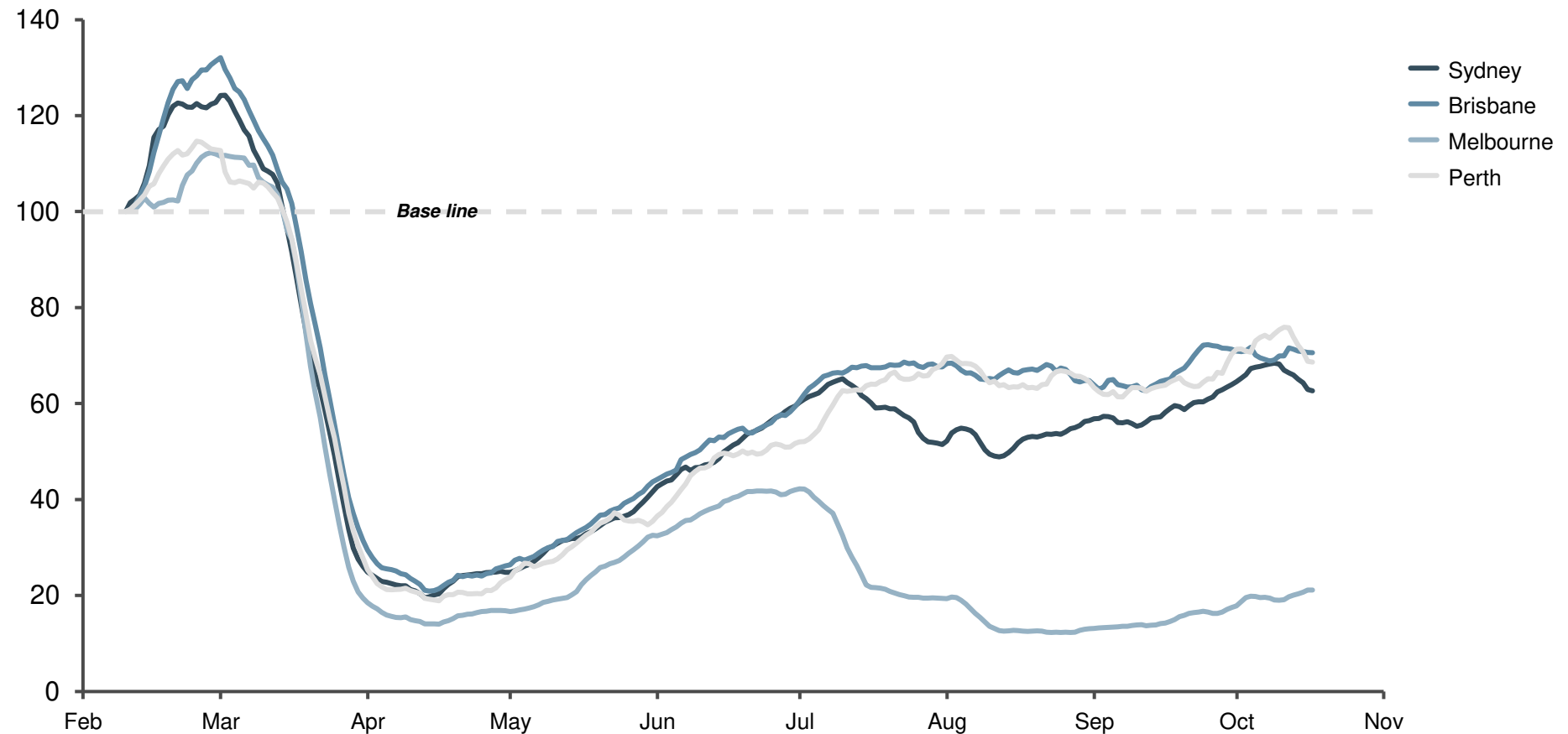Percent increase

Growth in advertised rents* (Mar-20 to Jun-20)

Legend:
- >10% increase
- 5% to 10% increase
- 0% to 5% increase

- 0% to 5% decrease
- 5% to 10% decrease
- 10% to 20% decrease

L.E.K.

Low recovery of public transport use is a national trend, and evident even in cities with fewer COVID-19 case numbers

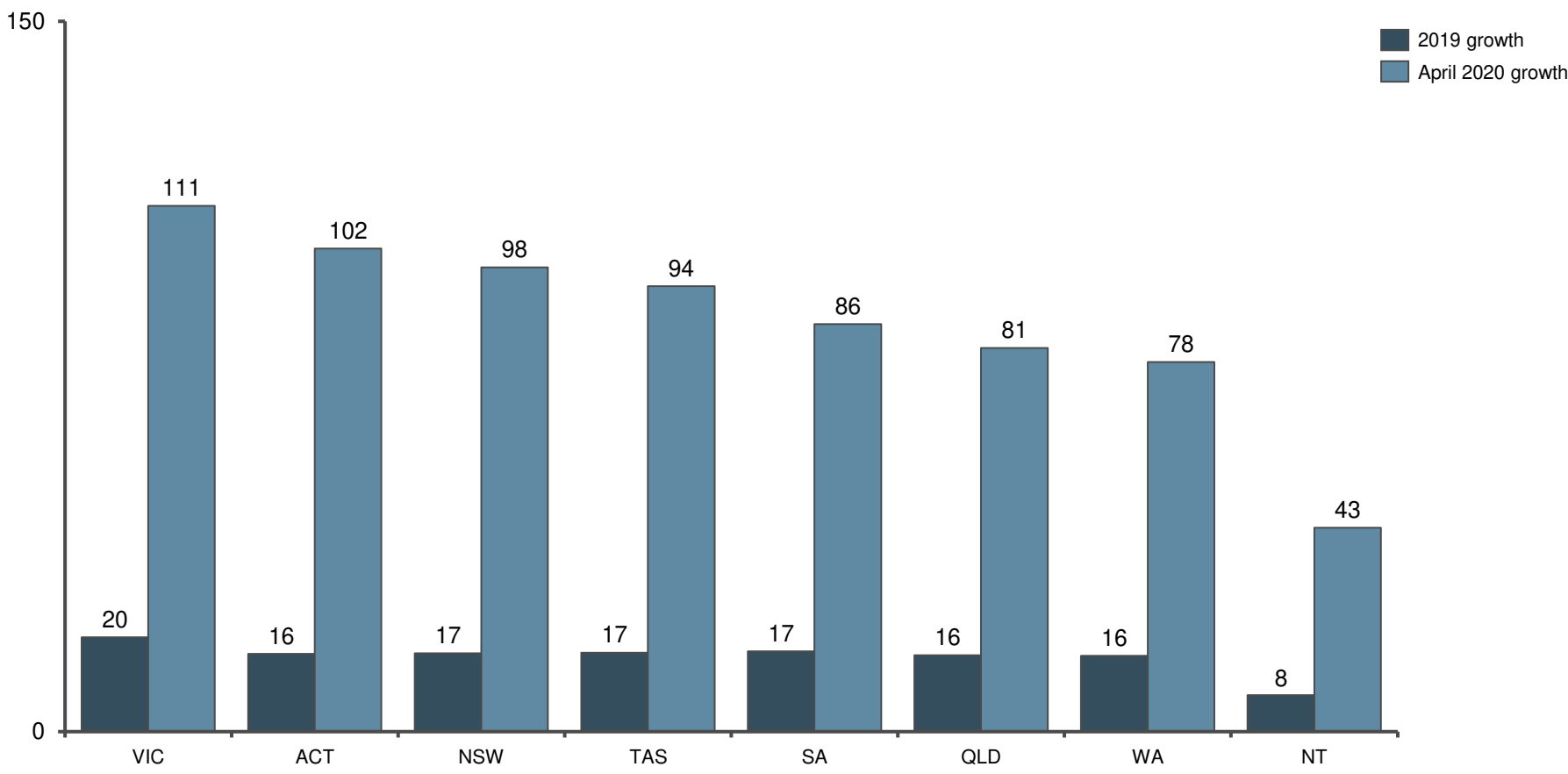**Indexed public transport demand*, by city**
(January-October 2020)
Percentage of baseline demand (7 day rolling average)

— Sydney
— Brisbane
— Melbourne
— Perth

L.E.K.

In the first month of lockdown, online shopping grew six times the level of growth in 2019, increasing the last mile freight task and household waste

Online shopping growth by state (2019-20)
Percentage

L.E.K.

Five key responses

Digitisation

100% growth
Monthly online retail growth was 5-6 times the annual growth in 2019

9 in 10 Australian firms
Adopted new technology including collaboration tools and cyber security

Decentralisation

163,459 new PV solar panels
under the small-scale renewable energy scheme in first half 2020

200% increase
in net migration from capital cities to regional areas

Localism

Growth in suburban last mile trips
With loading zone use falling to less than half in the Sydney CBD

23% increase
in utilization of national parks and green spaces nationally

Service innovation

Public transport improvements
such as increased cleaning, social distancing initiatives and real time occupancy data

17.2m telehealth consults
(Mar–Jun) comprising 35% of all Medicare Benefits Schedule services

Adaptability

40% extra broadband capacity
NBN released latent capacity to service providers to address network congestion

4600 new ICU beds
Health infrastructure repurposed to create 291% increased capacity

L.E.K.