

# Waka Kotahi COVID-19 transport impact

Fieldwork wave 29 deep dive analysis

Working from home

28 November 2022

# Disclaimer

This presentation is based on research currently being undertaken by Ipsos on behalf of Waka Kotahi NZ Transport Agency. In order to support an agile response to the unfolding COVID-19 pandemic, we are releasing regular key insights from the preliminary findings prior to this work being finalised. Please note that these deliverables have not yet been through a formal peer review process and the findings should be considered as draft.

While Waka Kotahi provided investment, the research was undertaken independently, and the resulting findings should not be regarded as being the opinion, responsibility or policy of Waka Kotahi or indeed of any NZ Government agency.

For more information on the COVID-19 weekly tracker contact:  
[NZTAresearch@nzta.govt.nz](mailto:NZTAresearch@nzta.govt.nz).

# Report content

## COVID-19 transport impact

- Section 1 – About this research
  - Overview & technical notes
- Section 2 – Rates of working from home
- Section 3 – Relative impact on public transport
- Section 4 – Feasibility and commuter types
- Section 5 – Overall impact of working from home on public transport



## Section 1 – About this research

# Study purpose and importance

## Introducing the Waka Kotahi NZ Transport Agency COVID-19 transport impact tracker

The **purpose of the COVID-19 Tracker** research is:

To understand **how travel is changing** and evolving in response to COVID-19 on a regular basis

- such as trip frequency and journey type changes.

To understand **why travel is changing** and evolving in response to COVID-19 on a regular basis

- such as perceptions/attitudes towards COVID-19 and travel options.

To include sufficient respondent numbers to understand how this varies across region and cohorts of interest

- such as different employment types (work from home, essential workers, etc), vulnerable groups (elderly, immune compromised, etc), DHB, etc.

To provide updates in a timely fashion so actions and planning can respond to the evolving situation.

The **importance of this research** cannot be understated:

There has been a major disruption to travel habits that will have long-lasting impacts on society:

- Where and how people choose to work, and how they choose to travel will change.
- Where people choose to travel domestically will change.
- How these changes will play out in the medium to long-term is unknown.

Without regularly updated knowledge on **what people are thinking and feeling**, and **why they are choosing** to travel the way they do, we won't be able to quantify how people are responding to COVID-19, and without this we won't know how best to respond and how we are able to influence travel habits.

- With regularly updated knowledge on COVID-19's impact, we can quantify how road usage and modal choice is changing, and we will know how to respond and influence future travel habits.

# Overview of research (i)

## Research design and outputs

The **design of the tracker** ensures we can undertake analysis at various levels for different purposes, and for different stakeholders.

The study is an online quantitative survey that is a nationally representative sample of New Zealanders 15+ years old, with a sample of ~n=1259 per wave, using quotas and data weighting.

- With sample boosts to ensure sufficient numbers to analyse key cities of interest, such as Tauranga, Dunedin and Hamilton.
- Sample numbers allow longitudinal view on cohorts and regions of interest.
- Sample is sourced from a blend of online panels, including Pure Profile, Ipsos iSay, Dynata and Consumer Link.

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

Fast turnaround of results to allow a weekly\* view on how behaviours and attitudes are changing.

- Design will pivot according to alert level changes that may occur at nationwide and regional levels.

There will be **two types of outputs** available:

1) Regular\* overview power point report

- benchmark and longitudinal summary of key data points
- including extra analysis based on topical questions.

2) [Open Data tables](#)

- Downloaded crosstabs of key variables in excel format, accompanied by survey technical report and questionnaire changes tracking log, downloadable from Waka Kotahi Open Data portal

\*For waves 1-14 fieldwork and reporting was undertaken weekly, for waves 15 and 16 fieldwork and reporting was undertaken bi-weekly, while wave 17 fieldwork and reporting was undertaken three weeks after wave 16 as fieldwork was brought forward from an intended monthly cycle due to an outbreak of COVID-19 community cases. Waves 17, 18, 19, 20 and 21 are weekly. Wave 22 took place 3 weeks after wave 21. Waves 23-29 have occurred on an ad hoc basis.

# Overview of research (ii)

## Question topics in the survey

### Question areas covered in the research:

#### Level of personal concern of the impact of COVID-19

- to themselves, their families, their work, the country, etc.

#### Current essential journeys and domestic travel undertaken and changes

- change is measured since February 2020.

#### Modal shift patterns and perceptual shifts

- including perceptions of public transport among users
- perceptions of various transports modes with regards to safety, hygiene, convenience, etc
- perceptions of potential shifts in work flexibility.

#### Measuring attitudinal shifts towards COVID-19

- using a Behavioural Science framework to understand current people's current state to facilitate potential interventions.

#### Questions to classify into a variety of segments of interest

- including journey profile, vulnerability, COVID-19 attitudes, economic, etc.

#### Ad hoc questions of interest

- including perceptions of future workplace flexibility, domestic tourism intentions, intention to return children to school, mask ownership, etc.

# Report notes (i)

## Key information to note for this report

- This report is based on 29 waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of fieldwork for specific alert levels, as well as individual waves where appropriate.
- The focus of this report is tracking trends and changes over time and how New Zealanders have adjusted their use of transport and travel behaviour. As this study was not conducted prior to level 4 restrictions, respondents were asked to recall their transport and travel behaviour prior to level 4 restrictions based on a 'normal week' ie in February 2020.
- At a total population level, significance testing indicated in this wave 29 report is based on a statistically significant shift of results between waves 1 to 29, as well as statistically significant shifts between combined alert levels.
- At a sub-population level, significance testing indicates a statistically significant difference between the sub-population and the base or total population. The total population benchmark is based on the total sample base collected across the first four waves of data.

\*Please note: During the fieldwork period, on 7 March, AKL dropped to Alert Level 2 and the rest of New Zealand moved to Alert Level 1.

\*\*Please note: Northland was also under Level 4 for much of the week preceding fieldwork, dropping to Level 3 at midnight on day of launch.

Wave	Dates of fieldwork	Alert level
1	Friday 3 April to Wednesday 8 April	Alert level 4
2	Thursday 9 April to Tuesday 14 April	
3	Thursday 16 April to Monday 20 April	
4	Thursday 23 April to Sunday 26 April	
5	Thursday 30 April to Sunday 3 May	Alert level 3
6	Thursday 7 May to Sunday 10 May	
7	Thursday 14 May to Sunday 17 May	Alert level 2
8	Thursday 21 May to Sunday 24 May	
9	Thursday 28 May to Monday 1 June	
10	Thursday 4 June to Sunday 7 June	
11	Thursday 11 June to Sunday 14 June	Alert level 1
12	Thursday 18 June to Sunday 21 June	
13	Thursday 25 June to Sunday 28 June	
14	Thursday 2 July to Sunday 5 July	
15	Thursday 16 July to Sunday 19 July	
16	Thursday 30 July to Sunday 2 August	
17	Thursday 20 August to Sunday 23 August	
18	Thursday 27 August to Sunday 30 August	
19	Thursday 3 September to Sunday 6 September	Alert Level 2.5 (AKL) / Alert level 2 (Rest of NZ)
20	Thursday 17 September to Sunday 20 September	
21	Thursday 24 September to Sunday 27 September	Alert level 2 (AKL) / Alert level 1 (Rest of NZ)
22	Thursday 15 October to Sunday 18 October	
23	Thursday 12 November to Sunday 15 November	Alert level 1
24	Thursday 4 March to Monday 8 March*	
25	Thursday 20 May to Monday 24 May	Alert level 1
26	Thursday 2 September to Monday 6 September**	
27	Thursday 10 March to Monday 14 March 2022	Covid Protection Framework, Red light, phase 2
28	Thursday 26 May to Tuesday 31 May	Covid Protection Framework, Orange
29	Thursday 3 November to Tuesday 8 November	No restrictions on travel, Covid protection framework ended



# Report notes (ii)

## Key transport terms and demographic groupings

There are a number of transport terms used in this report. Below are key terms with definitions:

**Public transport (PT):** refers to bus, train and ferry and does not include taxi/uber services and private hirer vehicles (these will be treated separately in the analysis).

**Private vehicle (PVT):** refers to car, van, motorcycle or scooter, and does not include e-bikes.

**Active modes:** refers to walking (of at least 10 mins) and cycling, including e-bikes.

There are a number of demographic subgroup terms used in this report. Below are key groups with definitions:

**Any disability:** All respondents indicating that they have a great deal of difficulty or cannot do the following: seeing, even when wearing glasses; hearing, even with a hearing aid; walking or climbing steps; remembering or concentrating; washing or dressing; communicating in their usual language.

**COVID-19 vulnerable:** All respondents indicating that they personally have a medical condition that makes them acutely vulnerable to COVID-19, such as heart disease, hypertension, chronic respiratory disease or cancer.

# Sample structure and further definitions

Wave	Display variable	Total	Region of residence							Disability, Vulnerability and COVID-19**		
			Auckland	Tauranga	Hamilton	Wellington	Christchurch	Dunedin	Rest of NZ	Any Disability	COVID-19 Vulnerable	Aged 70 + years
			All in Auckland Region, including city and surrounding rural areas	All living in the city of Tauranga	All living in the city of Hamilton	All in Wellington Region, including city and surrounding rural areas	All living in the city of Christchurch	All living in the city of Dunedin	All living in areas outside of those noted above	See previous page	See previous page	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over
Waves 1-4	Sample	n= 5,060	n=1,324	n=400	n=400	n=684	n=400	n=398	n=1,454	n=550	n=1,230	n=618
	MoE*	1.38	2.69	4.9	4.9	3.75	4.9	4.91	2.57	4.18	2.79	3.94
Waves 5-6	Sample	n=2,532	n=662	n=200	n=200	n=418	n=200	n=200	n=652	n=297	n=597	n=315
	MoE*	1.95	3.81	6.93	6.93	4.79	6.93	6.93	3.84	5.69	4.01	5.52
Waves 7-10	Sample	n= 5,043	n=1,324	n=400	n=400	n=799	n=400	n=392	n=1,328	n=611	n=1,139	n=627
	MoE*	1.38	2.69	4.9	4.9	3.47	4.9	4.95	2.69	3.96	2.9	3.91
Waves 11-16	Sample	n= 7,561	n=1,964	n=599	n=600	n=1,129	n=601	n=607	n=2,061	n=866	n=1,640	n=830
	MoE*	1.13	2.21	4	4	2.92	4	3.98	2.16	3.33	2.42	3.4
Waves 17-18	Sample	n= 2,455	n=661	n=200	n=200	n=311	n=200	n=200	n=683	n=284	n=584	n=266
	MOE*	1.98	3.81	6.93	6.93	5.56	6.93	6.93	3.75	5.82	4.06	6.01
Waves 19-20	Sample	n= 2,626	n=676	n=197	n=217	n=357	n=200	n=208	n=771	n=323	n=617	n=293
	MOE*	1.91	3.77	6.98	6.65	5.19	6.93	6.79	3.53	5.45	3.95	5.73
Wave 21	Sample	n= 1,253	n=331	n=100	n=100	n=175	n=100	n=87	n=360	n=132	n=317	n=162
	MOE*	2.77	5.39	9.8	9.8	7.41	9.8	10.51	5.16	8.53	5.5	7.7
Wave 22	Sample	n=1,220	n=331	n=97	n=101	n=156	n=100	n=93	n=342	n=130	n=299	n=131
	MOE*	2.81	5.39	9.95	9.75	7.85	9.8	10.16	5.3	8.6	5.67	8.56
Wave 23	Sample	n=1,247	n=331	n=86	n=100	n=165	n=100	n=100	n=365	n=142	n=305	n=141
	MOE*	2.77	5.39	10.57	9.8	7.63	9.8	9.8	5.13	8.22	5.61	8.25
Wave 24	Sample	n=1,232	n=331	n=67	n=100	n=161	n=100	n=100	n=373	n=142	n=297	n=160
	MOE*	2.79	5.39	11.97	9.8	7.72	9.8	9.8	5.07	8.22	5.69	7.75
Wave 25	Sample	n=1,259	n=331	n=100	n=100	n=194	n=100	n=100	n=334	n=187	n=311	n=133
	MOE*	2.76	5.56	9.8	9.8	7.04	9.8	9.8	5.36	7.17	5.56	8.5
Wave 26	Sample	n=1,261	n=331	n=100	n=100	n=164	n=100	n=100	n=336	n=133	n=324	n=159
	MOE*	2.76	5.39	9.8	9.8	7.65	9.8	9.8	9.8	8.5	5.44	7.77
Wave 27	Sample	n=1,181	n=331	n=68	n=95	n=117	n=100	n=95	n=375	n=140	n=299	n=144
	MOE*	2.85	5.39	11.88	10.05	9.06	9.8	10.05	5.06	8.28	5.67	8.17
Wave 28	Sample	n=1,223	n=329	n=83	n=100	n=165	n=101	n=83	n=362	n=164	n=303	n=186
	MOE*	2.80	5.4	10.76	9.8	7.63	9.75	10.76	5.15	7.65	5.63	7.19
Wave 29	Sample	n=1,233	n=311	n=100	n=100	n=177	n=100	n=100	n=345	n=180	n=310	n=169
	MOE*	2.79	5.56	9.8	9.8	7.37	9.8	9.8	5.28	7.3	5.57	7.54

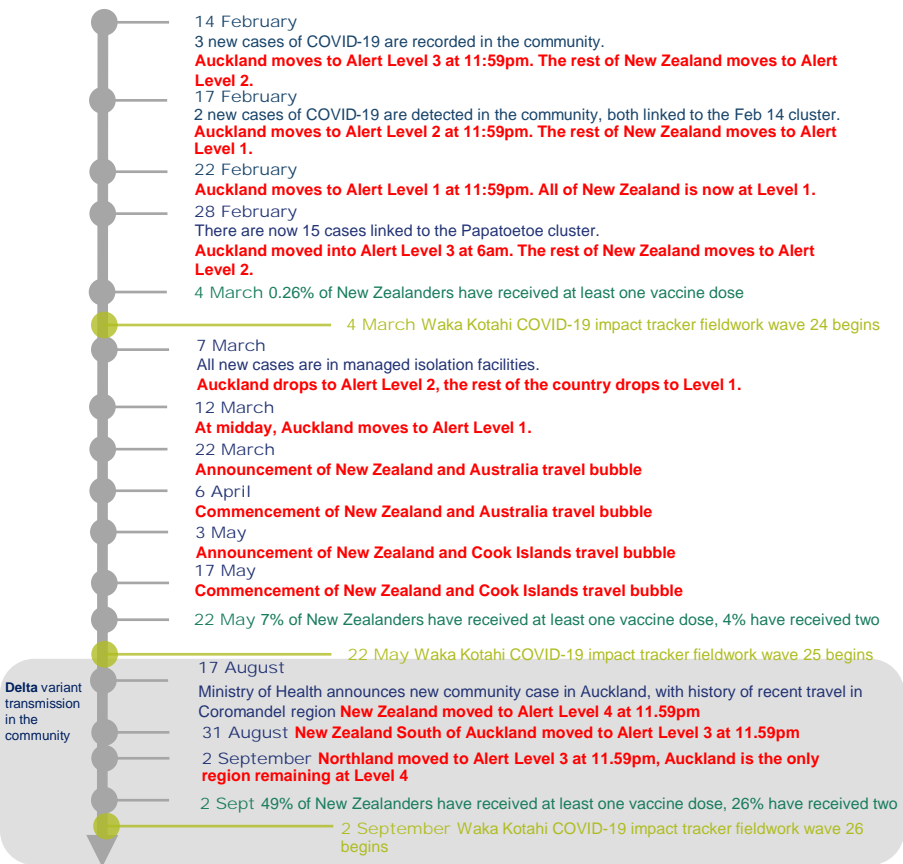
\*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 April 12:44pm.

\*\*Sub-groups are *not mutually exclusive* as individuals may fit into more than one category (for example, some may be aged over 70 and also have a chronic respiratory condition that makes them more vulnerable to COVID-19) any such respondents within the sample would be counted in *both* applicable groups.

# Context: New Zealand COVID-19 timeline – 2020



# Context: New Zealand COVID-19 timeline – 2021



Delta variant transmission in the community



Cumulative vaccination data sourced from [health.govt.nz](https://health.govt.nz) on 14/09/2021

# Context: New Zealand COVID-19 timeline – 2021/22

Delta variant transmission in the community

2 December

From 11.59pm on 2 December 2021, New Zealand moves to the COVID-19 Protection Framework, also known as the traffic light system. **The South Island and parts of the North Island are at orange. Auckland, Northland, and areas from Whanganui and Rangitikei to East Cape in red.**

13 December

From 11.59pm on 30 December, Auckland and most of the other regions currently in red move to orange.

**South Island remains orange and Northland remains at red.**

16 December

First case of Omicron reported in New Zealand, in managed isolation in Christchurch.

21 December

Government announces that phased border reopening will be delayed until the end of February.

## 2022

17 January

Over 18's can book a booster vaccine shot four months after their second vaccine. The Pfizer vaccine is available to children aged 5-11 years at 500 vaccination sites

17 January Vaccination rate of eligible people reaches 95% first dose, 93% second dose

18 January

First case of community transmission of Omicron in New Zealand,

20 January

Covid-19 Protection Framework Level change: From 11.59pm Northland currently at red joins the rest of New Zealand at orange. **440 cases on Omicron and 32 cases of Delta detected at the border since 1 December 2021**

21 January

Due to the infectiousness of Omicron, case isolation temporarily increased to 14 days from 10 days. **The isolation time for close contacts has been increased to 10 days, from seven.**

22 January Of those eligible, 54% have received a booster shot

23 January

COVID-19 Protection Framework level change: From 11.59pm all of New Zealand goes to red from orange, due to high risk of undetected community spread of Omicron.

3 February

New date announced for border reopening, which will begin on February 27 with fully vaccinated New Zealanders and other eligible visitors returning from Australia.

**From 11.59pm medical type masks are now mandatory for workers subject to compulsory vaccination and in a public facing role.**

Omicron variant transmission in the community

4 February

The approved time between the second vaccine and the booster reduced for those who are over 18, from four months to three.

24 February

From 11.59pm phase 3 of the Governments plan comes to effect. Only household contacts will be considered contacts, RAT-detected cases will self-notify their result to the official register, those who test positive to notify their own contacts, and rapid antigen tests introduced at Auckland general practices and urgent care clinics.

27 February

From 11.59pm borders reopen to vaccinated New Zealanders from Australia. **MIQ is removed with self-isolation and test on arrival.**

28 February

Most travellers entering New Zealand from 28 February 2022 must provide evidence of a negative COVID-19. **Government announces self-isolation requirements to be relaxed for returning New Zealanders.**

1 March Novavax vaccine approved in New Zealand for those 18 and older.

2 March

from 11.59pm fully vaccinated New Zealanders and other eligible people entering from Australia are no longer required to isolate. They must return a negative pre-departure test result. They must also return negative RAT results on arrival and on day 5/6; those who are COVID-positive must report the results and self-isolate.

4 March

Borders opened to New Zealanders and other eligible travellers from anywhere in the world and don't have to self-isolate. **51.6% of children aged 5-11 years have had their first dose, 72.2% of people eligible have received a booster.**

9 March

Government announces case and household contact isolation period to reduce to seven days from 10, at 11.59pm on 11 March.

11 March

From 11.59pm case and household contact isolation periods are reduced from 10 to seven days.

18 March

From 11.59pm unvaccinated NZ citizens and those eligible do not have to enter MIQ or self-isolation.

25 March

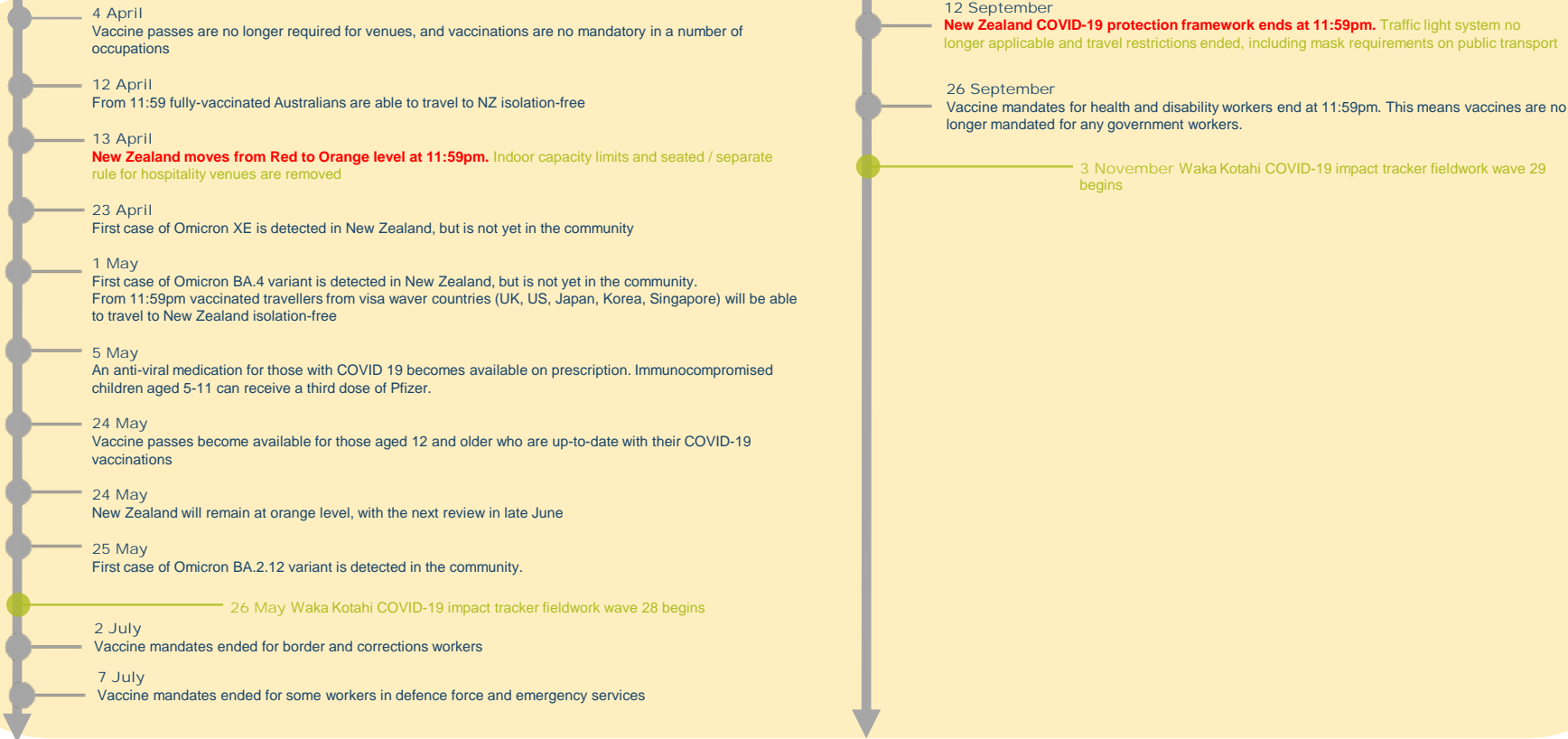
Limits on outdoor gatherings are removed, limits on indoor gatherings changed from 100 to 200. QR code scanning and signs are no longer required

10 March Waka Kotahi COVID-19 impact tracker fieldwork wave 27 begins

Cumulative vaccination data sourced from [health.govt.nz](https://health.govt.nz) on 14/09/2021

# Context: New Zealand COVID-19 timeline – 2022

Omicron variant transmission in the community



# Deep dive analysis

## Emergent stories and trends

- It is expected that with the constantly evolving nature of the COVID-19 pandemic, the changing alert levels governing public behaviour and emergent narratives impacting civil society discourse, the environment in which this research takes place will also be ever evolving.
- Deep dive analysis delivered as part of this research will enable questions to be answered outside of the core remit, and to periodically check in on societal variables and trends that may not be of interest every single week, but will speak to contextual changes and important landmarks in New Zealand's response to the COVID-19 overtime.
- Content included in the deep dive is generated from steering group requests.
- The emerging narratives in this deck are in places more complex than would warrant inclusion in the core report, included also are other narratives that may take on greater prominence later on when more responses are accumulated or when alert levels are changed.

# Summary

## Wave 29 deep dive – working from home (WFH)

The 29<sup>th</sup> wave of fieldwork took place between Thursday 3 and Tuesday 8 November, 2022.

This deep dive is designed to investigate how increased working from home is impacting the transportation network and the reasons that public transport is seeing a more substantial impact. In a few places data from the Waka Kotahi Customer Journey Monitor has also been included to assist with analysis.

### Context

Despite the end of the COVID protection framework, reported rates of working from home are unchanged from May 2022 at around 20%, more than double the reported pre-COVID incidence. Data from the Customer Journey Monitor shows that working New Zealanders consistently WFH at least 1 day a week on average, which may be a 'new normal' even without travel restrictions.

### Public transport

It is clear that public transport is most impacted by WFH. Only 14% of pre-COVID private vehicle commuters worked from home in November, compared to 26% of pre-COVID PT commuters. Based on reported commuting days, close to 90% of pre-COVID private vehicle commuters are now travelling into work each week day, but the PT commuter population varies across the week, with only 68% of pre-COVID commuters still travelling on a Friday.

### Impact of feasibility on PT commuters working from home

This research has previously shown that pre-COVID PT commuters are more likely to have jobs that can be carried out from home. Almost 9-in-10 of those surveyed in 2022 say that they can do at least some of their job from home, compared to 7-in-10 private vehicle commuters. Almost 8-in-10 of those who *did* commute by PT in November said they *could* WFH if they wanted to. Attitudinally, PT commuters show significantly more *desire* to work from home more and report significantly greater flexibility from their workplace. They are also more likely to work in CBDs or other major urban areas and tend to live close to these areas, in CBDs and suburbs. The types of non-manual jobs concentrated in these areas may be more easily done from home than the jobs at out-of-town business and industrial areas that a quarter of private vehicle commuters do.


### Overall impact of WFH on PT

Greater flexibility for PT commuters to WFH clearly impacts patronage, particularly either side of weekends. However, WFH is not the sole factor: of adults interviewed in 2022 who would have commuted by PT before COVID, almost a quarter reported a different primary commute mode in the past week, with 1 in 5 travelling by private vehicle instead.

Of those not travelling for work at all, only a third were working from home, with a similar proportion working less, or not working any more.

In addition, even those still commuting full time by bus and train for work have reduced their overall usage, reporting fewer days of travel by these modes on average. Wider behaviour changes on the part of these commuters will also have a role to play in changing patronage and they may have reduced their bus, train and ferry travel for non-work journeys as well.

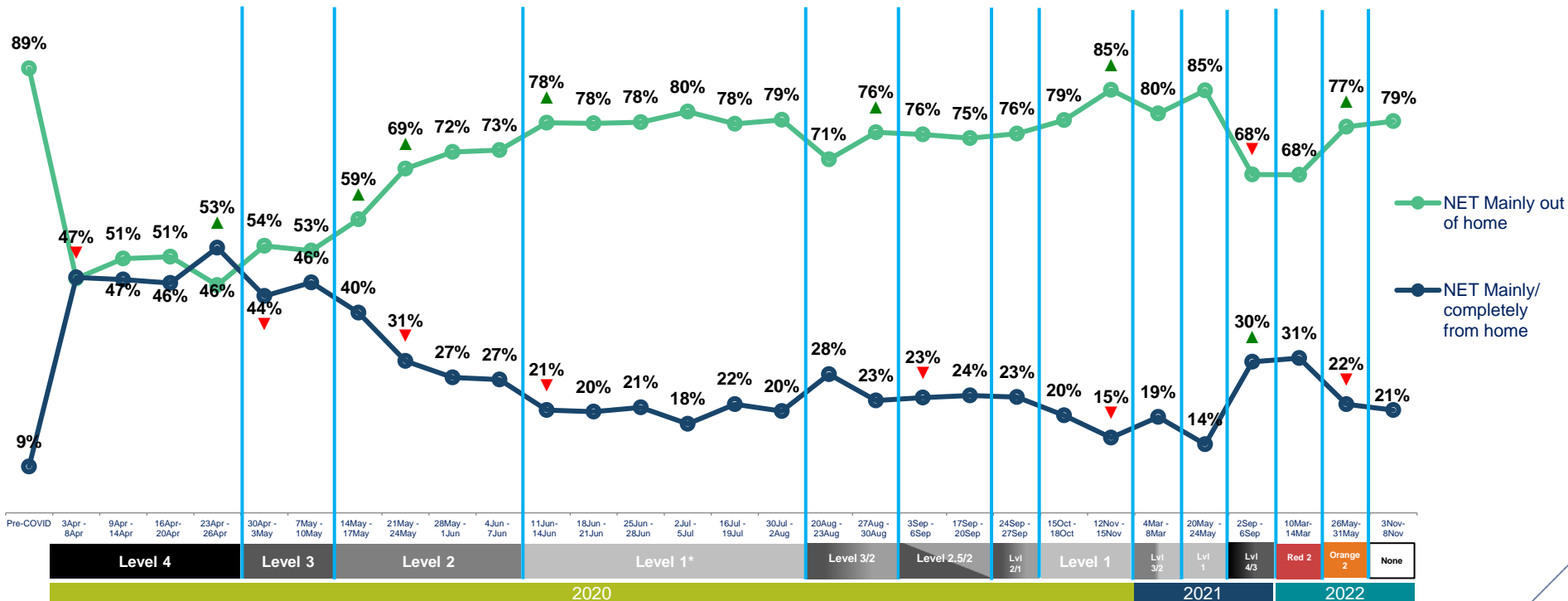




## Section 2 – Rates of working from home

# The settling of WFH incidence around 20% suggests a new normal with a net reduction in commuter populations

## Proportion working in and out of home by survey wave



QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you currently work?

Base: all adults 15+ who are usually working



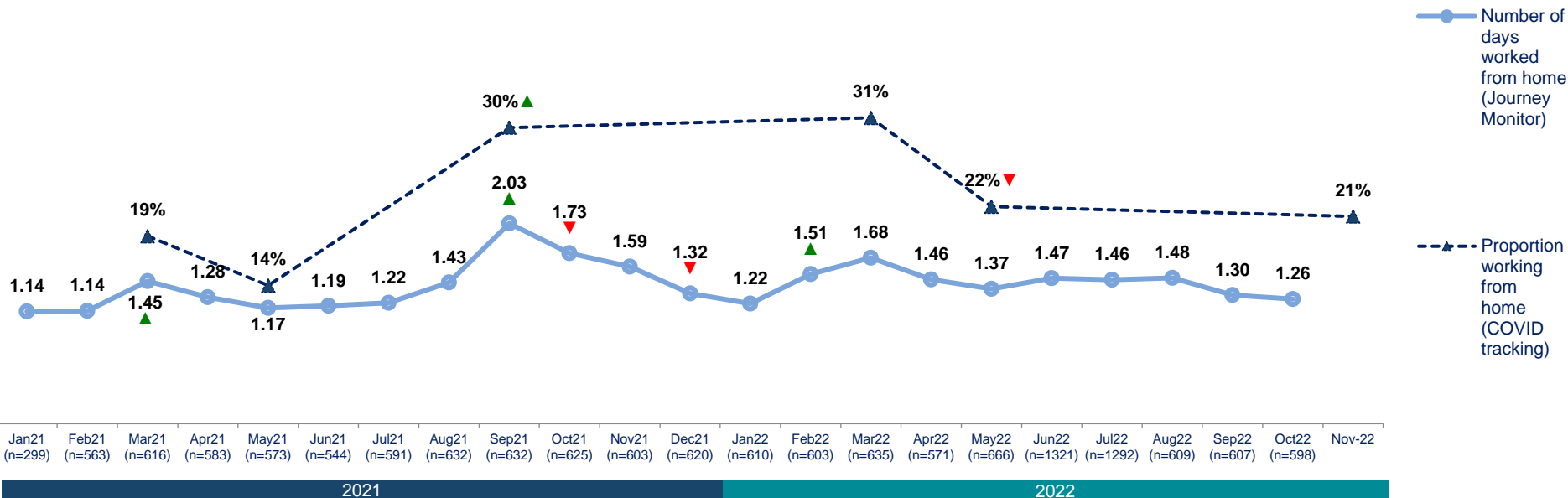
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# The ending of the COVID protection framework hasn't significantly reduced the number of days that working people are working from home on average

## Working from home – among working adults



QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?

Base: all adults 15+ who are usually working

QAF1 – On how many days in the last week have you travelled each of these ways?

Base: all working adults 15+ - Customer Journey Monitor

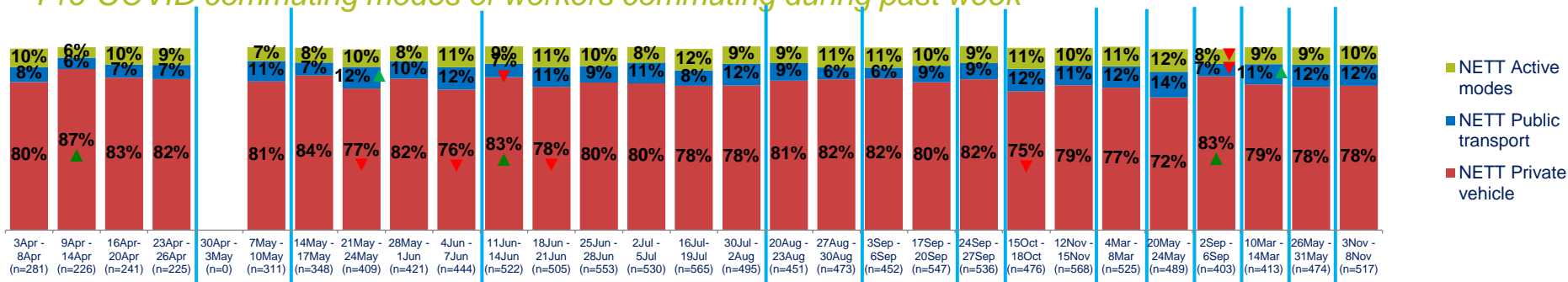


A woman wearing a blue jacket, a grey hat, and orange shoes is stepping out of the open door of a yellow and blue bus. She is carrying a patterned bag. The bus has a yellow upper section and a blue lower section. A sign on the side of the bus reads "EMERGENCY DOOR CONTROL: PUSH BUTTON TO OPEN. DO NOT PRESS THIS BUTTON UNLESS YOU ARE IN AN EMERGENCY." The background shows a building and a clear sky.

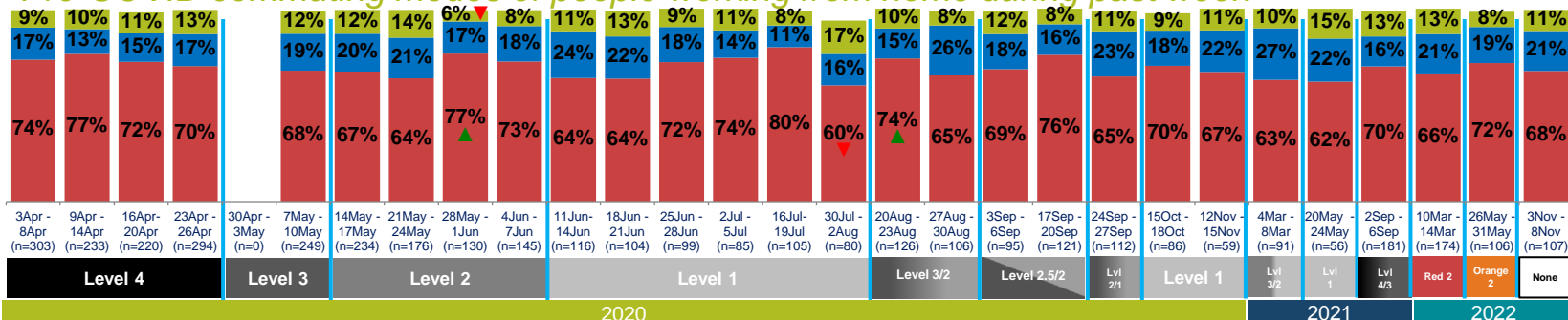
## Section 3 – Relative impact on public transport

# Public transport and active mode travel are consistently over-represented in the usual commuting modes of people working from home

## Pre-COVID commuting modes of workers commuting during past week



## Pre-COVID commuting modes of people working from home during past week



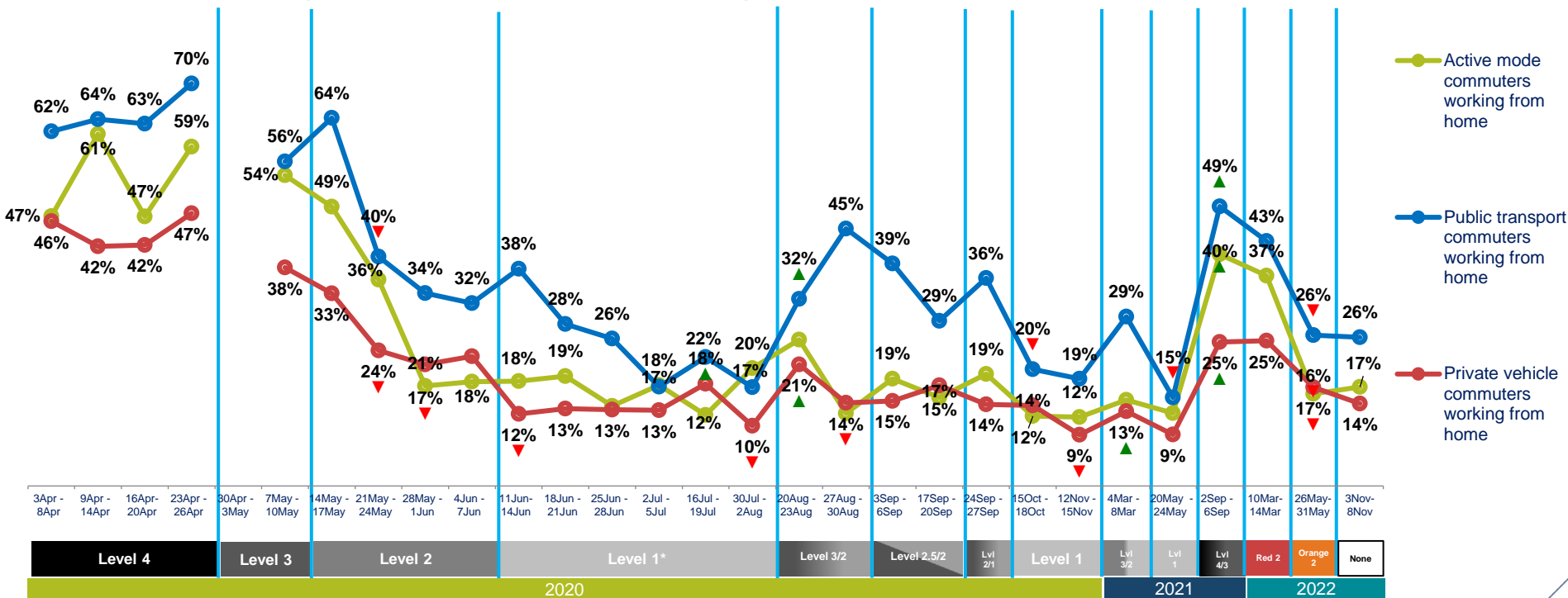
QMODE1 – Thinking again about how you would normally travel within the course of a normal week in March 2020 (before the outbreak of COVID) how would you normally make each of the following types of journeys listed below? **NB** – Analysis will not always sum to 100% for each wave: 'don't know' and 'taxi/uber/etc' hidden as usually reported by <1%.

Base: all adults 15+ in New Zealand who would have travelled to work in a typical pre-COVID week



# A quarter of workers who commuted by PT before COVID are working from home for most of their working week, almost double the rate for private vehicle commuters

## Proportion working from home by usual commuting mode



QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?

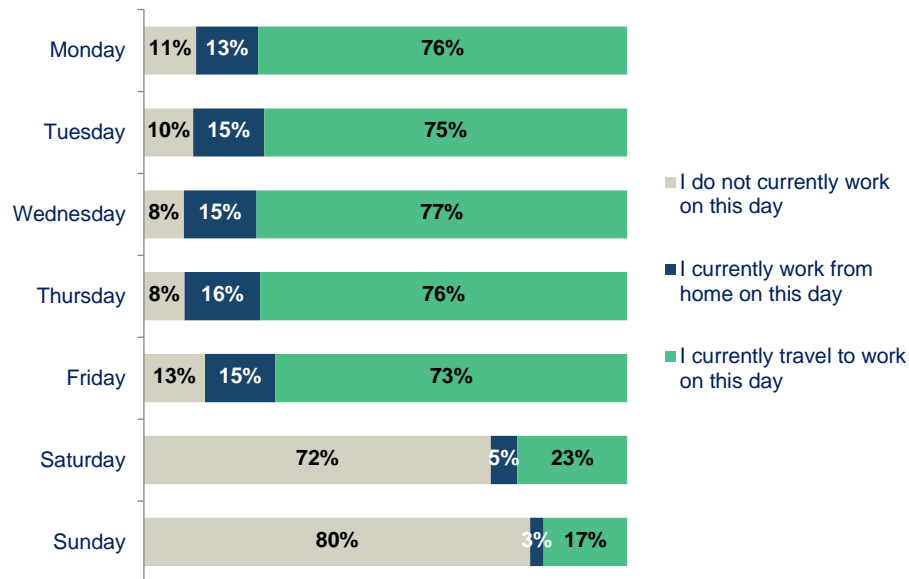
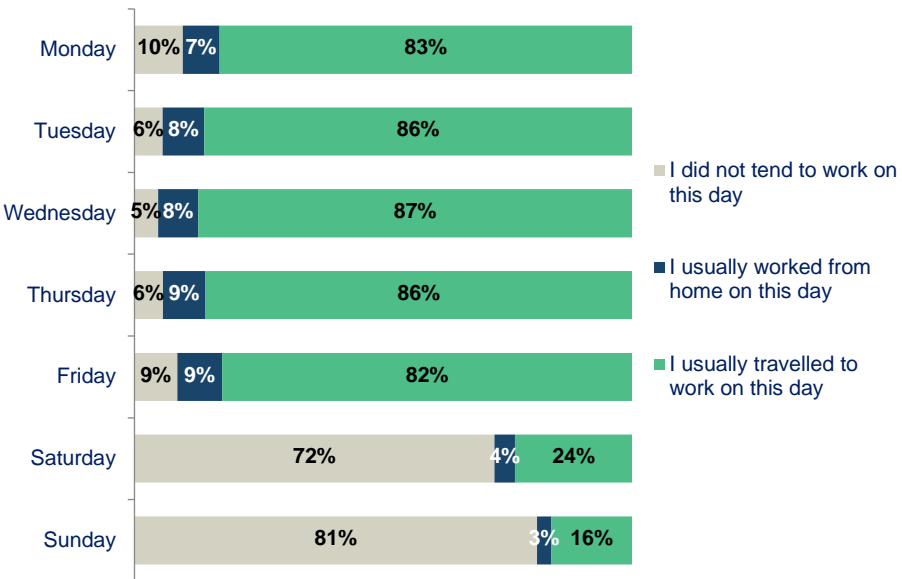
Base: all adults 15+ in New Zealand who would have travelled to work in a typical pre-COVID week



# While the proportion of drivers working from home each day has almost doubled, around $\frac{3}{4}$ of private vehicle commuters are commuting each week day

## Days WFH for normal private vehicle commuters – pre-COVID

## Days WFH for normal private vehicle commuters – past week



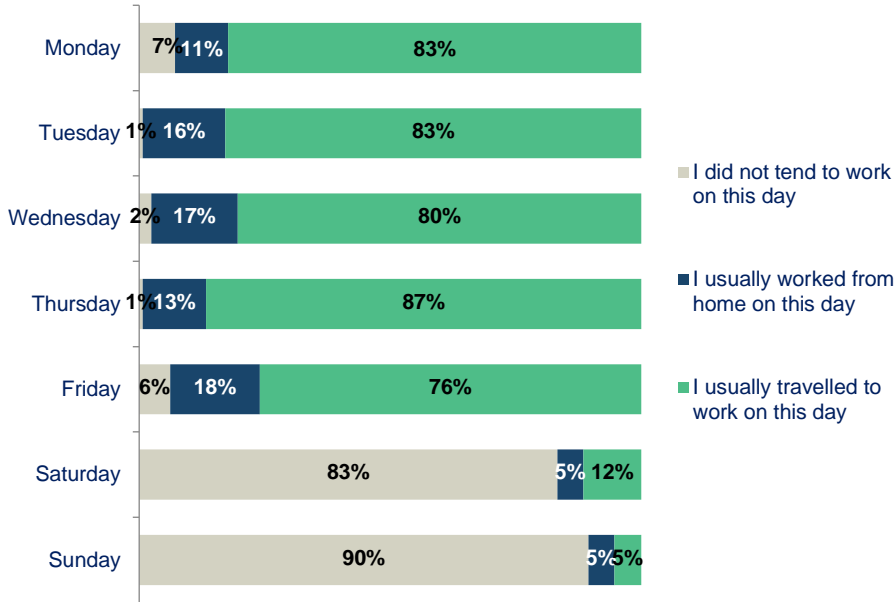
QWORK2E\_NEW\_A/QWORK2E\_NEW: Thinking again about your work arrangements at the beginning of March 2020, before outbreak of COVID-19, please state your usual work travel arrangements during that time: Thinking about the last week, for each day, please state your current work travel arrangements:

Base: all 15+ in New Zealand who would have travelled to work by Car, van or motorcycle in a typical pre-COVID week and were still working last week (n=556) – Nov 2022 responses only

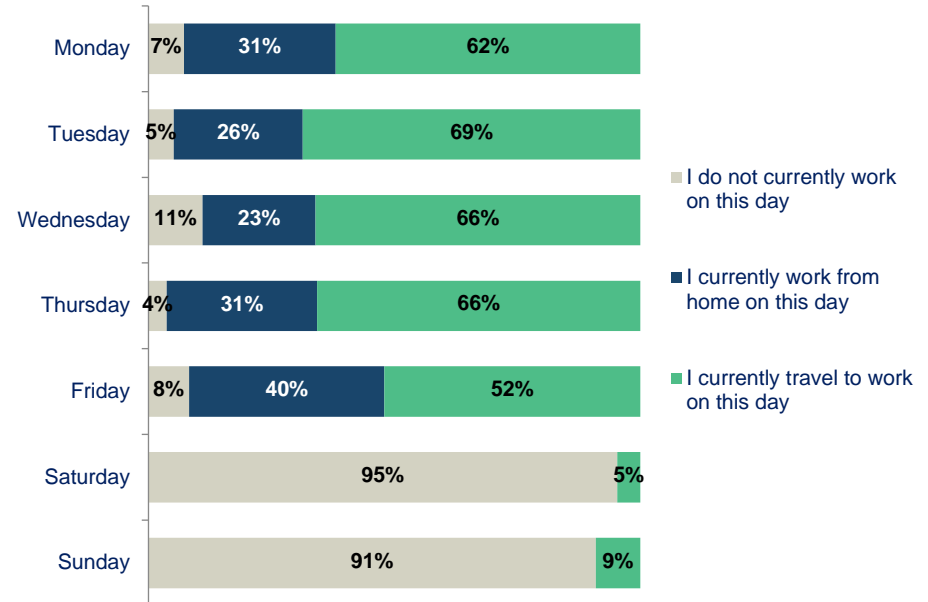


# PT commuters are now less likely to work at weekends than before COVID, while the proportion commuting most weekdays has decreased between 14 and 24 points

## Days WFH for normal PT commuters – pre-COVID



## Days WFH for normal PT commuters – past week



QWORK2E\_NEW\_A/QWORK2E\_NEW: Thinking again about your work arrangements at the beginning of March 2020, before outbreak of COVID-19, please state your usual work travel arrangements during that time: Thinking about the last week, for each day, please state your current work travel arrangements:

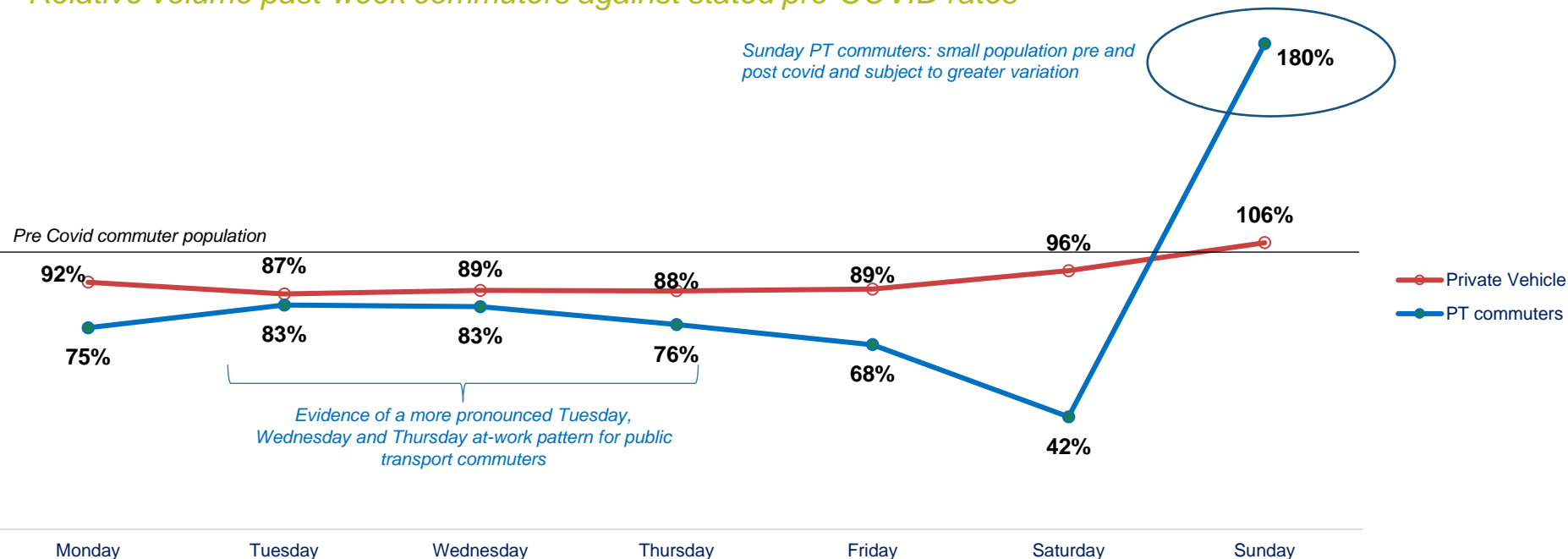
Base: all 15+ in New Zealand who would have travelled to work by PT in a typical pre-COVID week and were still working last week (n=83) – Nov 2022 responses only





Across the week, almost all of the private vehicle commuting population has returned, but either side of the weekend, at least a ¼ of pre-COVID PT commuters are missing

*Relative volume past-week commuters against stated pre-COVID rates*



QWORK2E\_NEW\_A/QWORK2E\_NEW: Thinking again about your work arrangements at the beginning of March 2020, before outbreak of COVID-19, please state your usual work travel arrangements during that time: Thinking about the last week, for each day, please state your current work travel arrangements:

Base: all 15+ in New Zealand who would have travelled to work by PT in a typical pre-COVID week and were still working last week (n=83) – Nov 2022 responses only

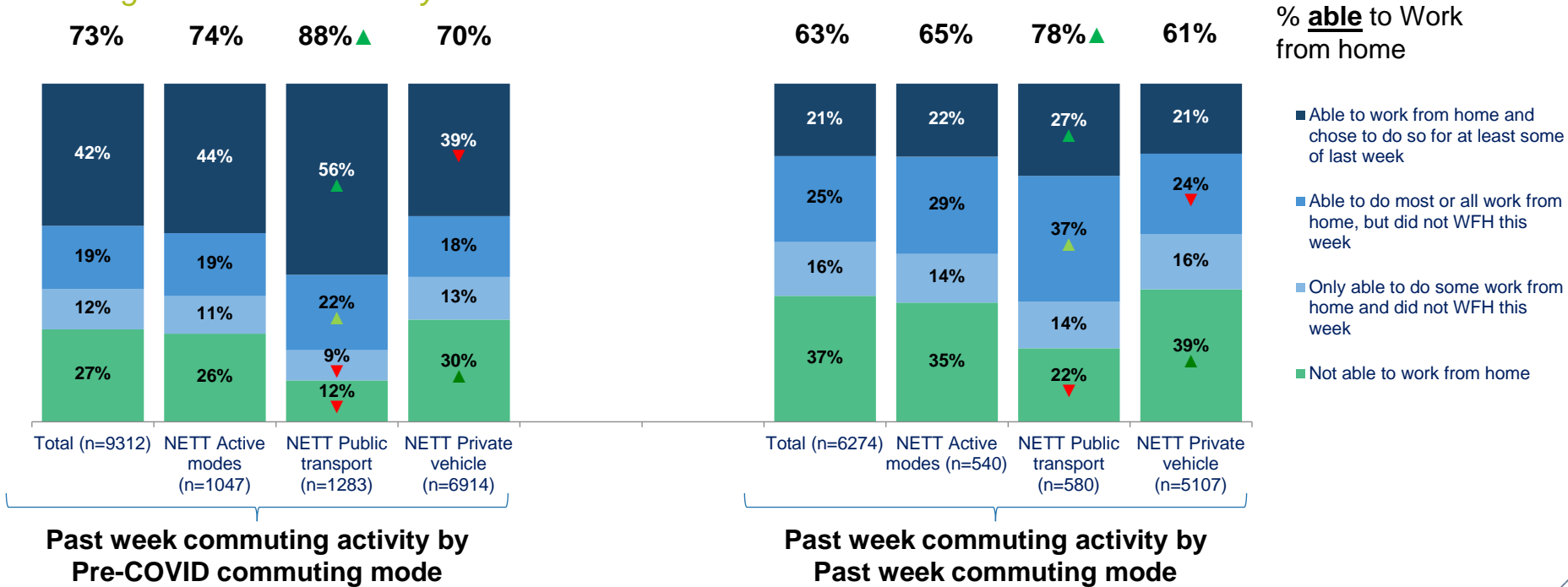




## Section 4 – Feasibility and commuter types

# Even PT commuters who *have* commuted in the past week are significantly more likely to be able to work from home

## Working from home feasibility



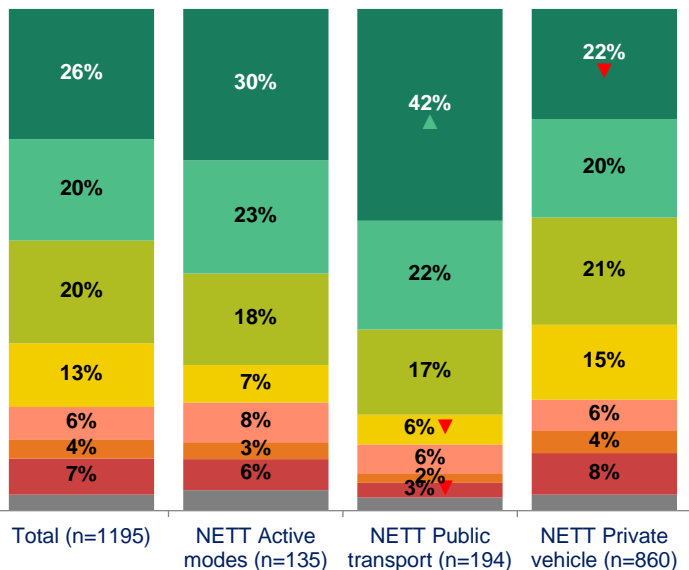
QWORK2A/WORK2D – And where do you currently work? Which, if any of the following applies to your job?  
 Base: all adults 15+ in New Zealand responding in 2022 who would have travelled to work in a typical pre-COVID week using each mode



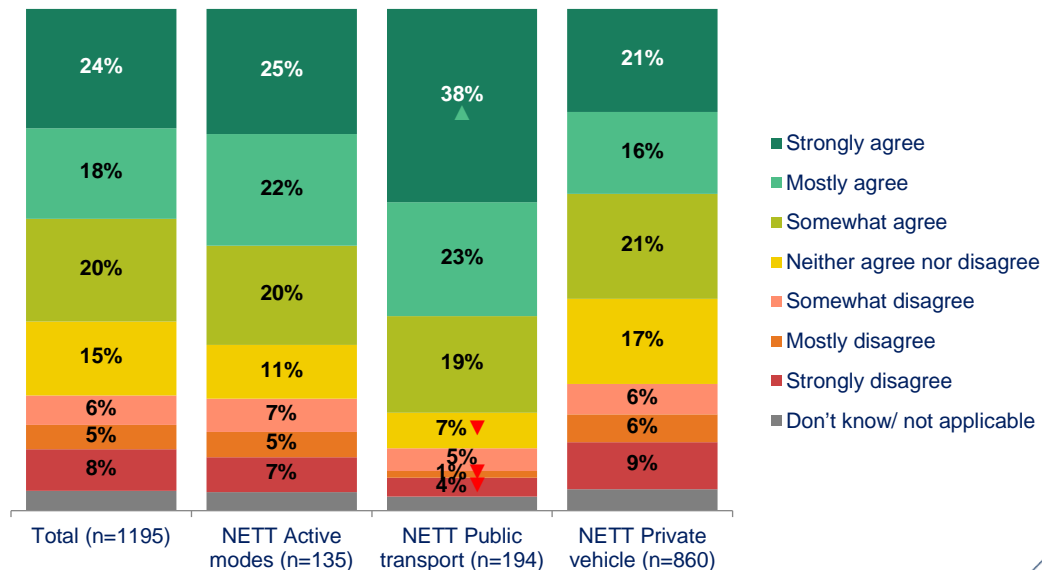
# PT commuters are significantly more likely to say their workplace is more flexible and has made changes to enable working from home.

## Workplace support for working from home among those able to do so by pre-COVID commuting mode

**My workplace has become more flexible / open to people working from home**



**My workplace has changed how it operates so more people can regularly work from home**



QWORK6A/WORK2D – Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?

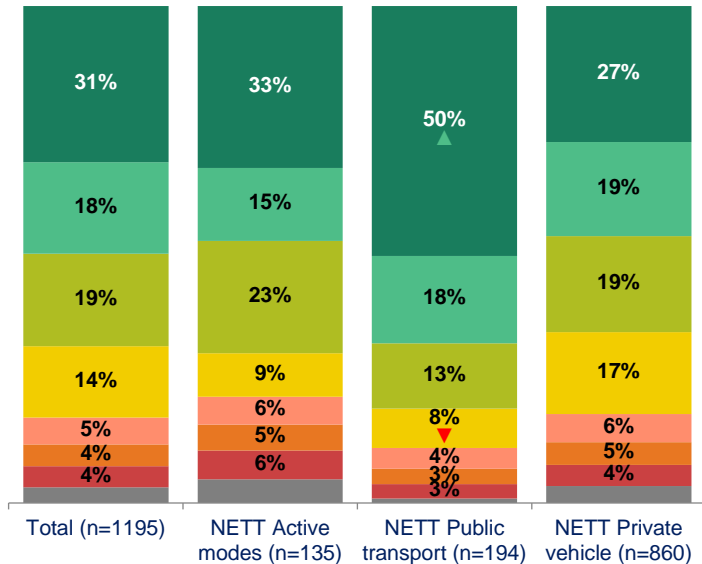
Base: all adults 15+ in New Zealand who would have travelled to work in a typical pre-COVID week (2022 completes only) and who are able to do some work from home if they wish to



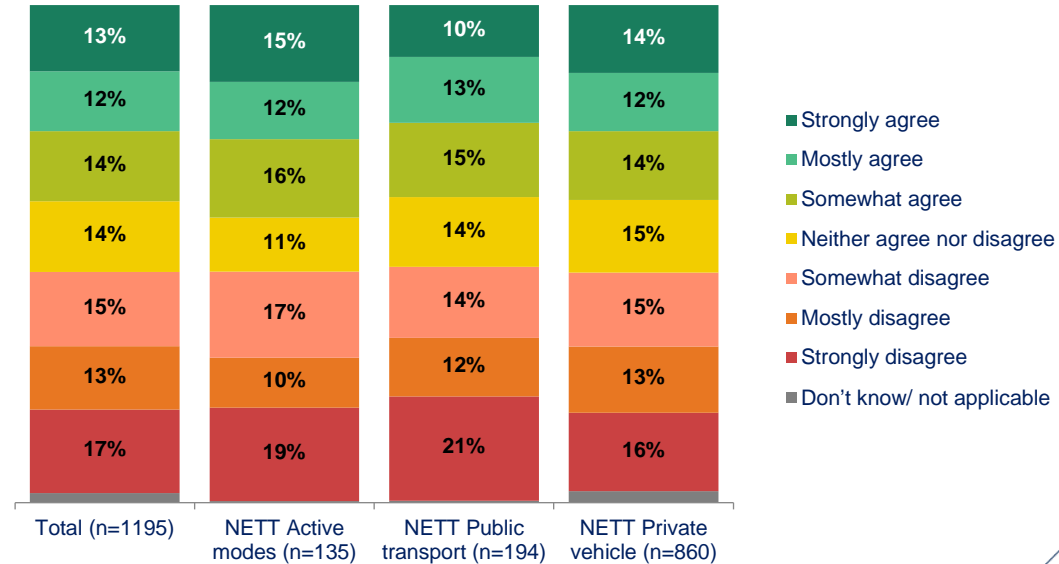
# There isn't a particular commuter group that is more strongly *opposed* to working from home, but half of PT commuters express a desire for WFH flexibility

## *Interest in working from home among those able to do so by pre-COVID commuting mode*

(Now that I've experienced it), I would like more flexibility to work from home



My preference would be to only work from home as a last resort



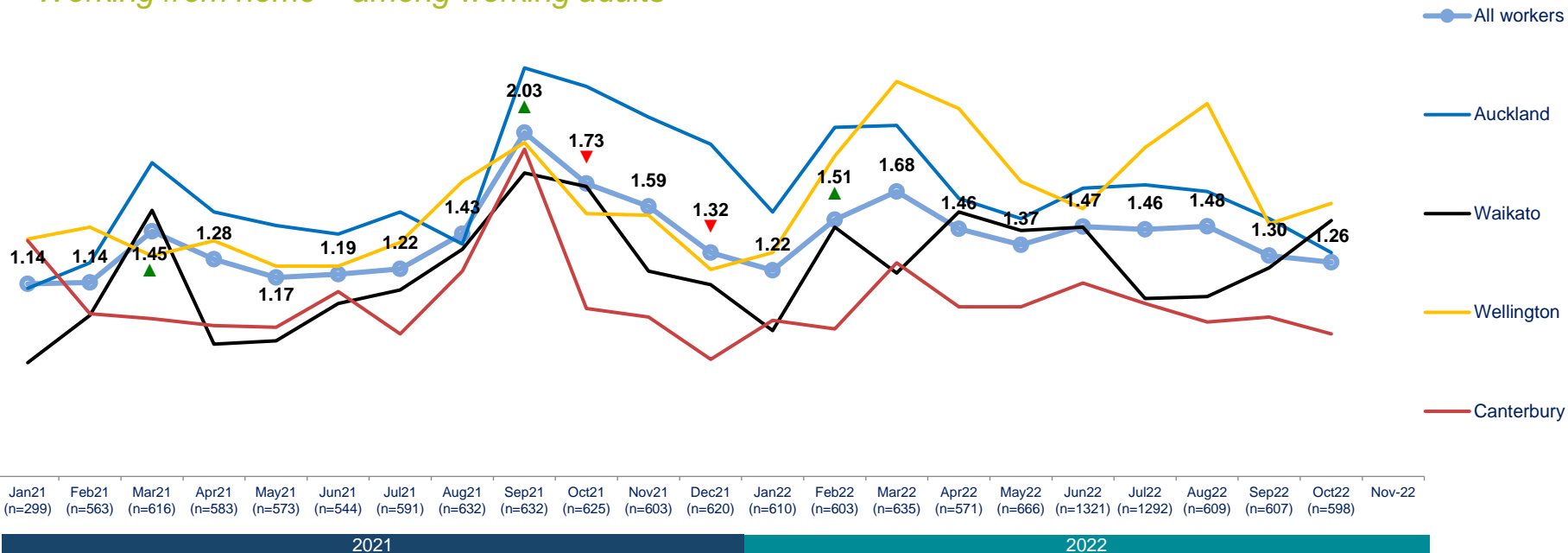
QWORK6A/WORK2D – Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand who would have travelled to work in a typical pre-COVID week (2022 completes only) and who are able to do some work from home if they wish to



# Journey Monitor data indicates rates of working from home are consistently higher in Auckland and Wellington

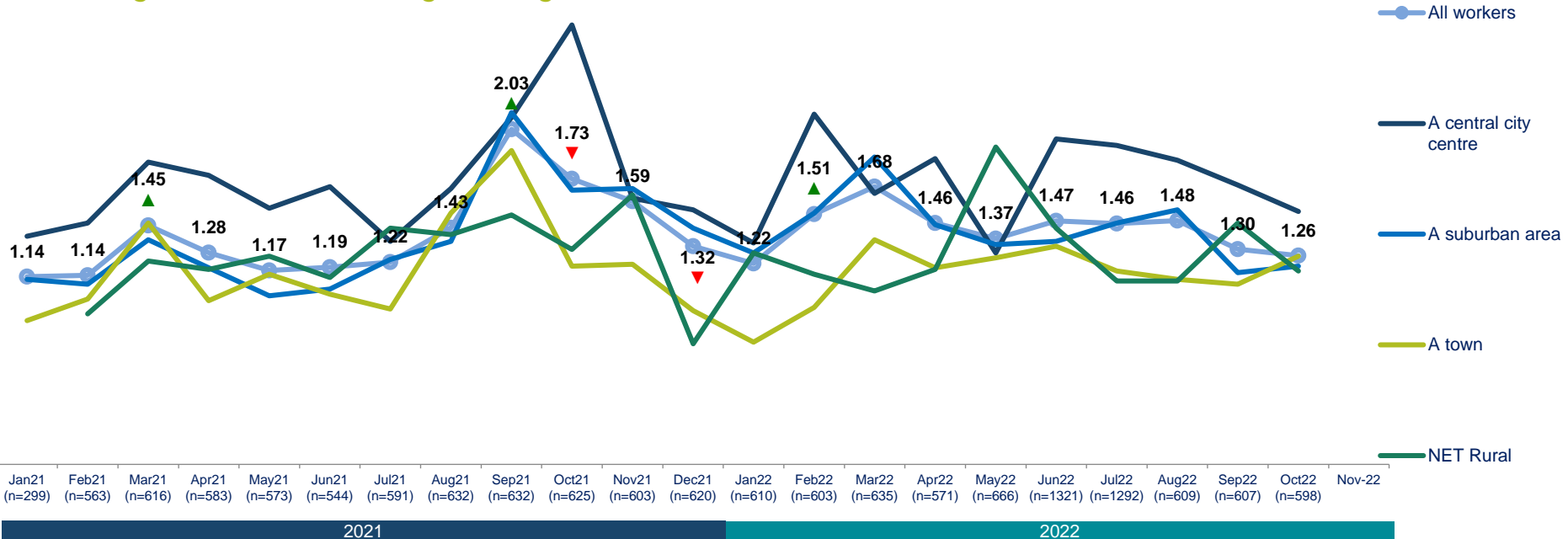
## Working from home – among working adults



QAF1 – On how many days in the last week have you travelled each of these ways? – Working From Home  
 Base: all working adults 15+ - Customer Journey Monitor

# Working from home rates are also consistently higher for those living in city centres and suburbs

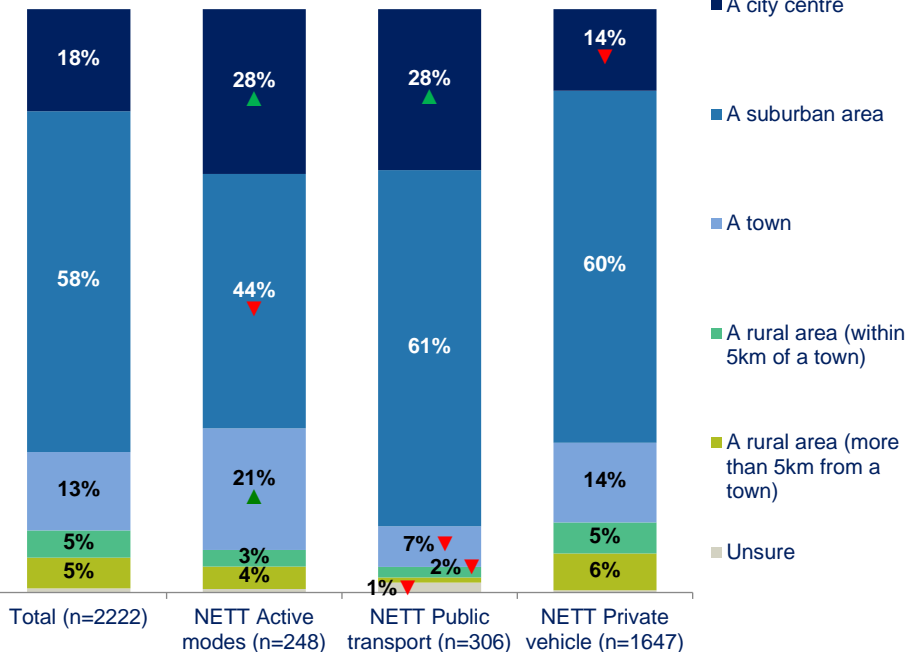
## Working from home – among working adults



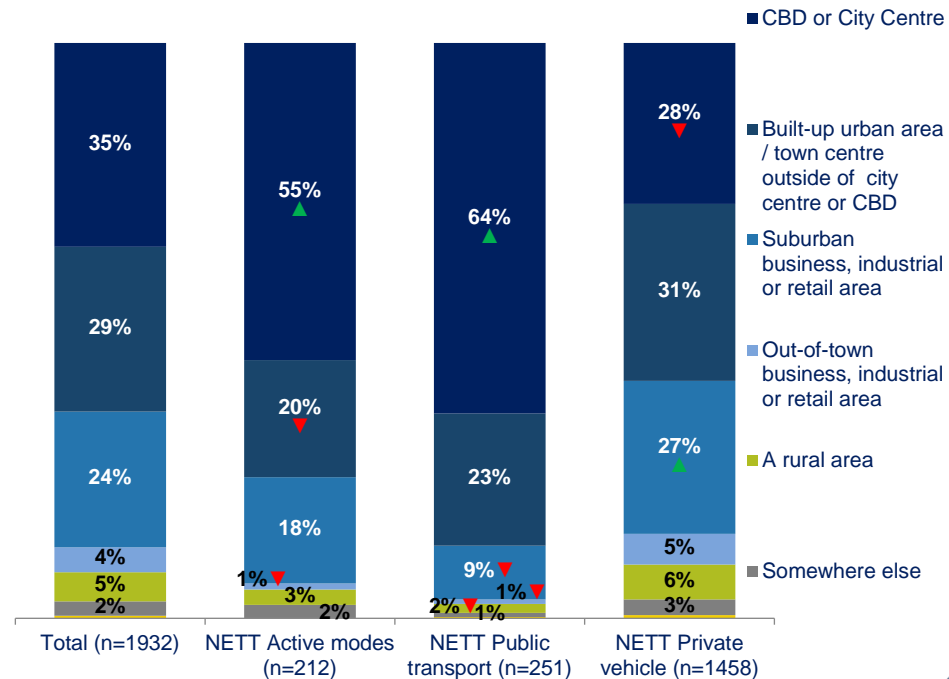
QAF1 – On how many days in the last week have you travelled each of these ways? – Working From Home  
 Base: all working adults 15+ - Customer Journey Monitor

# PT commuters tend to be heading to local city centres and live in similar areas, likely around major commuting corridors

## Home location by pre-COVID commuter mode



## Work location by pre-COVID commuter mode



QWORK6A/WORK2D – Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand who would have travelled to work in a typical pre-COVID week (2022 completes only)





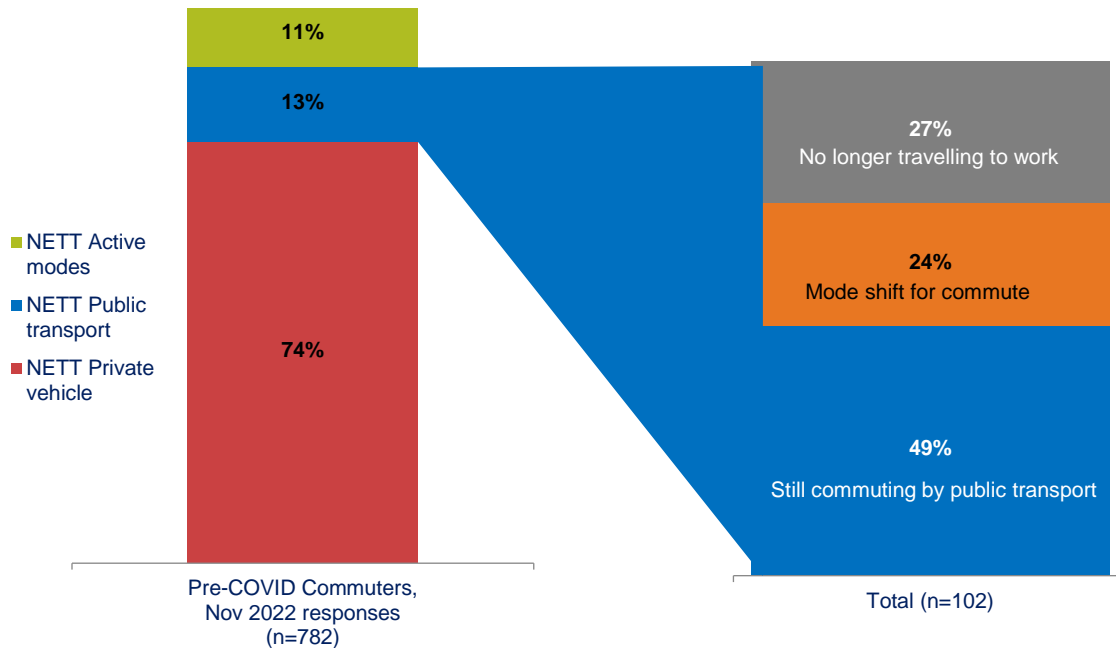


# Section 5 – Overall impact of working from home on public transport

# The biggest cause of the reduction in commuter volume comes from people who no longer travel for work, with a quarter changing their commute mode since March '20

*Pre COVID commuting mode*

*Past week activity of pre-COVID PT commuters*

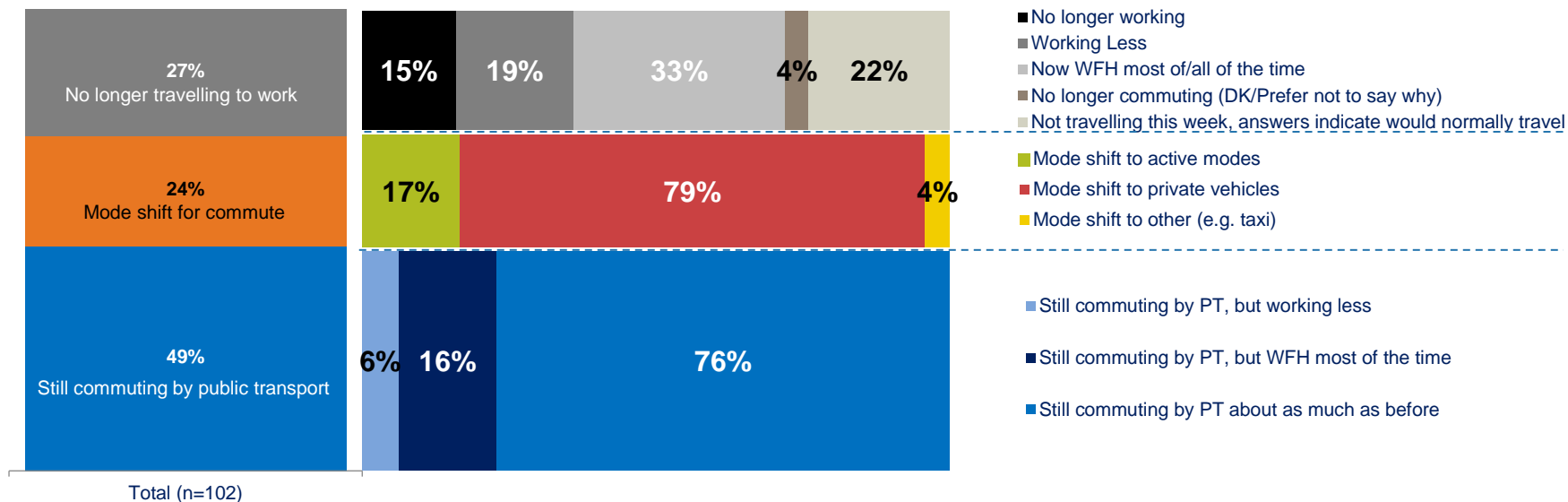


QFREQ1/QFREQ2 – And in the course of a normal week during March 2020, before the outbreak of COVID-19 in New Zealand, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

Base: all 15+ in New Zealand who would have travelled to work by train in a typical pre-COVID week (n=87) and who commuted (n=43) and who worked from home (n=27\*), 2022 responses only  
 \*low base, results indicative only

# Working from home accounts for a third of those no longer travelling, and 1-in-6 of those still commuting are travelling less, most mode shift is to private vehicles

## Past week activity of pre-COVID PT commuters

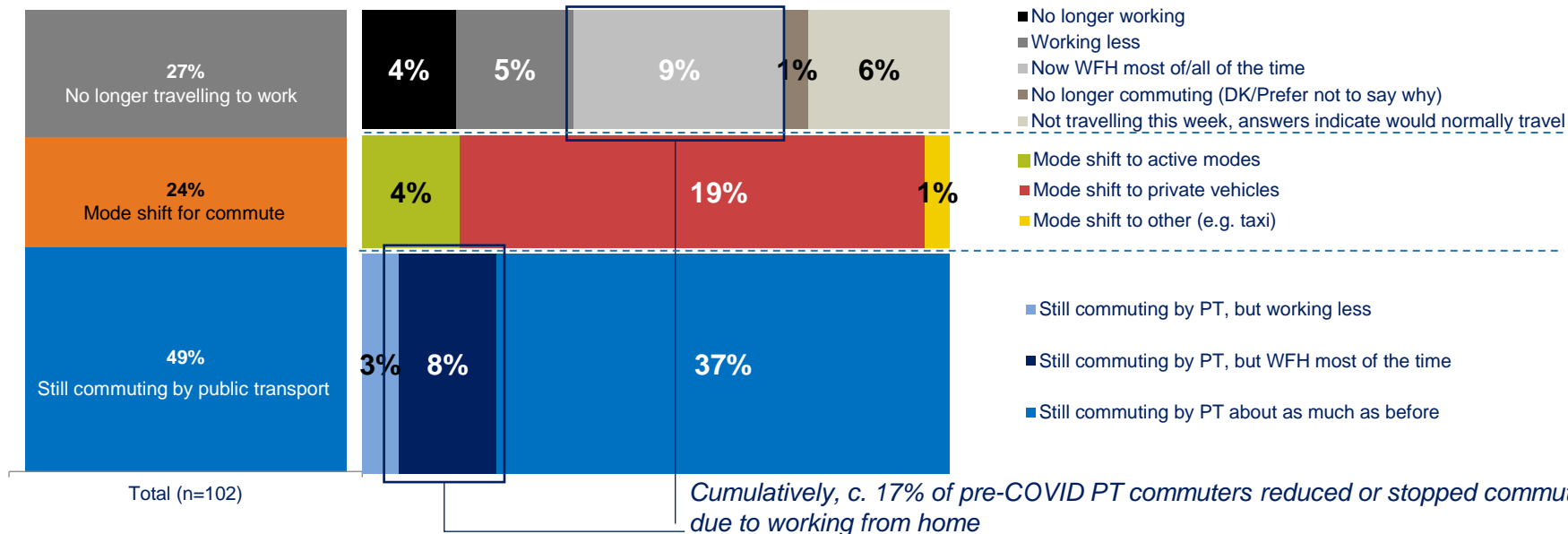


QFREQ1/QFREQ2 – And in the course of a normal week during March 2020, before the outbreak of COVID-19 in New Zealand, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

Base: all 15+ in New Zealand who would have travelled to work by public transport in a typical pre-COVID week (n=102) 2022 responses only

# There has been a shift away from PT by pre-COVID commuters, some of which may have been offset by new commuters, but WFH is not the only factor

## Past week activity of pre-COVID PT commuters – rebased to all



QFREQ1/QFREQ2 – And in the course of a normal week during March 2020, before the outbreak of COVID-19 in New Zealand, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

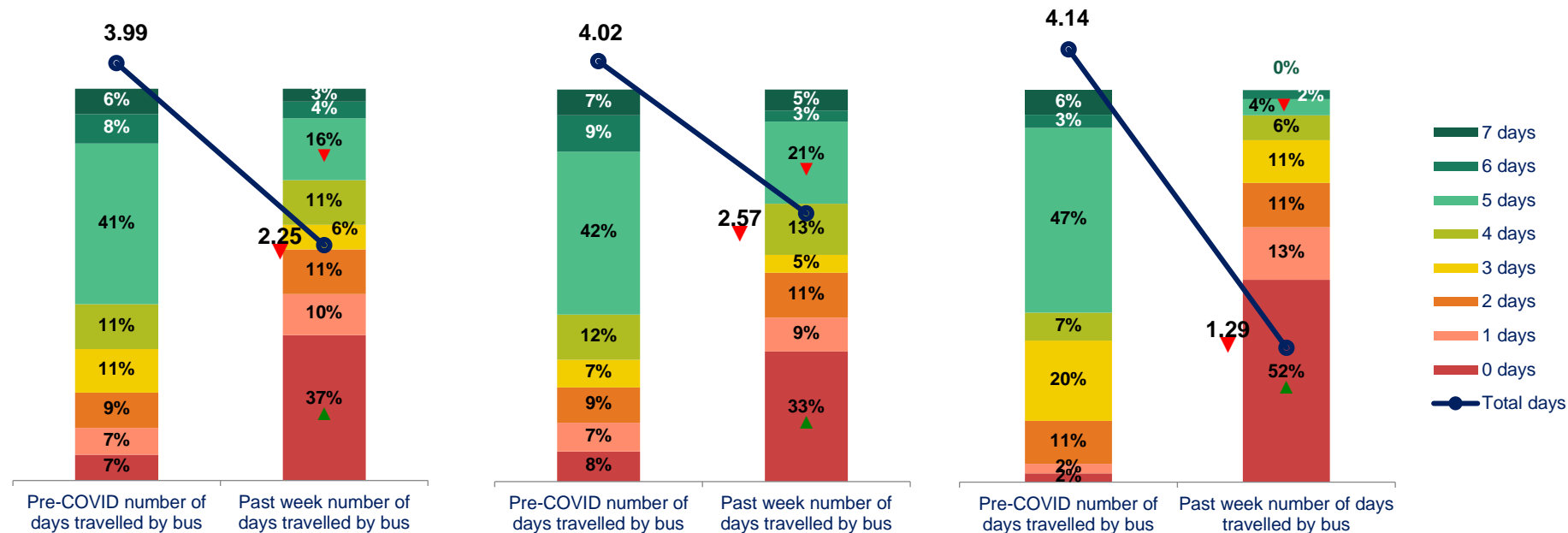
Base: all 15+ in New Zealand who would have travelled to work by public transport in a typical pre-COVID week (n=102) 2022 responses only

# However, even bus commuters travelling to work in the past week travelled on significantly fewer days by bus in total

All pre-COVID bus commuters

All commuting past week

All WFH past week



QFREQ1/QFREQ2 – And in the course of a normal week during March 2020, before the outbreak of COVID-19 in New Zealand, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

Base: all 15+ in New Zealand who would have travelled to work by bus in a typical pre-COVID week (n=209) and who commuted (n=113) and who worked from home (n=50), 2022 responses only

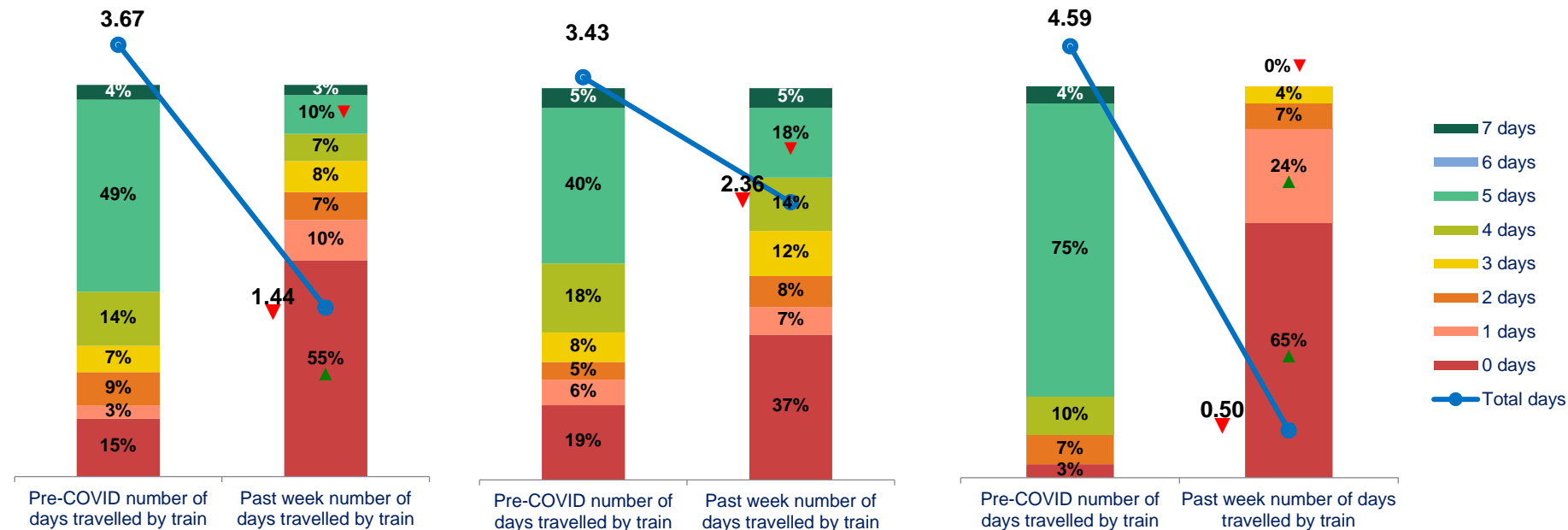


# The same is true for pre-COVID train commuters, a third of those still travelling to work reported 0 days of train travel, so some mode shift may play a role

All pre-COVID train commuters

All commuting past week\*

All WFH past week\*

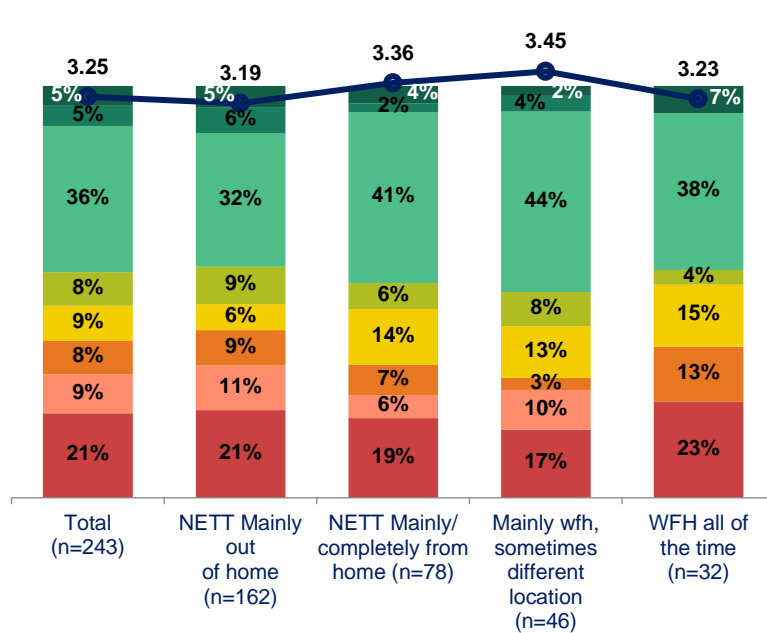


QFREQ1/QFREQ2 – And in the course of a normal week during March 2020, before the outbreak of COVID-19 in New Zealand, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

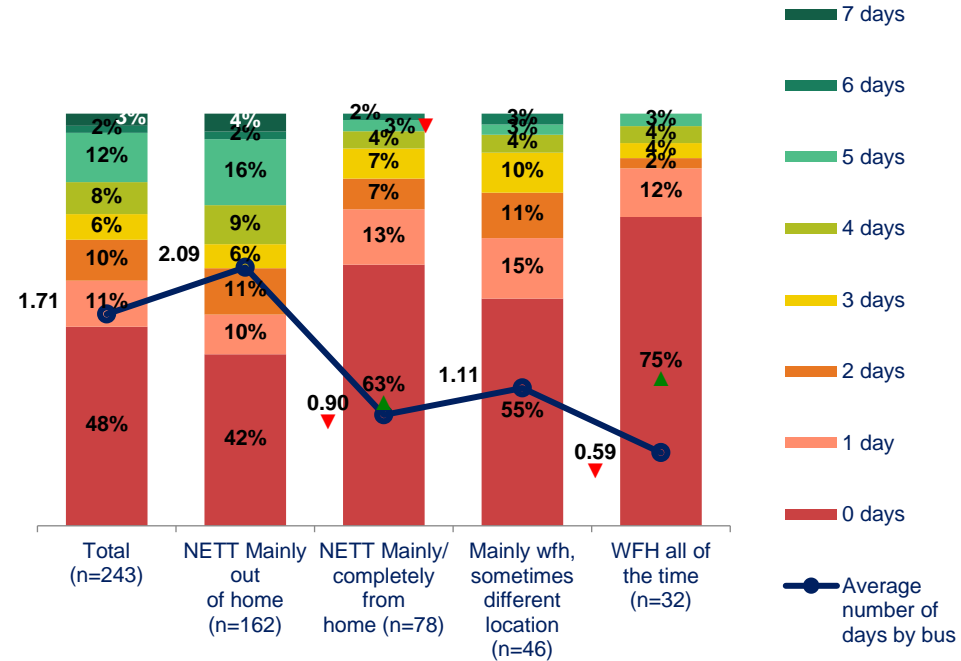
Base: all 15+ in New Zealand who would have travelled to work by train in a typical pre-COVID week (n=87) and who commuted (n=43\*) and who worked from home (n=27\*), 2022 responses only  
\*low base, results indicative only

# Those WFH in past week have reduced their bus travel volume the most, but even those still commuting are using buses one day less on average

Pre-COVID number of days travelled by bus



Past week number of days travelled by bus



QFREQ1/QFREQ2 – And in the course of a normal week during March 2020, before the outbreak of COVID-19 in New Zealand, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?  
 Base: all pre-COVID Bus commuters by past week work site, 2022 responses only

# Working from Home

**Working from home has become more common-place, even without COVID-related travel restrictions.**

- The proportion of workers doing so once a week or more is at least *double* what it was pre-COVID.
- On average, in 2022, working adults work from home more than once per week.
- PT patronage is disproportionately impacted, with emergent Tuesday, Wednesday and Thursday in-office patterns more common.

**The larger impact on public transport patronage is in part driven by more workplace flexibility.**

- PT commuters are largely travelling from CBDs and suburban areas to the same sorts of places, where office & clerical jobs are based and bus & train services are well established and more frequent.
- Not only do they express greater capability to do their work from home, but a stronger desire to do so and more support in this from their workplace.

**However, working from home is not the only behavioural change impacting patronage.**

- Many pre-COVID PT commuters have stopped or reduced work and a quarter indicate that their commute has shifted to private vehicles or active modes.
- The total volume of PT travel days is significantly reduced *even among those* who are still travelling to work.
- These commuters may have reduced PT travel for other journey types, contributing to reduced patronage.



