

Waka Kotahi COVID-19 transport impact

Fieldwork wave 7: working from home deep dive analysis

19 May 2020

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.

REPORT CONTENT

COVID-19 transport impact

- Section 1 – About this research
- Section 2 – Working from home context
- Section 3 – Employers as barriers
- Section 4 – Preferred site and flexibility



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 weekly basis

- such as trip frequency and journey type changes.

To understand **why travel is changing** and evolving in response to COVID-19 on a weekly 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 weekly 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 weekly sample of n=1259 per week, 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 **three types of outputs** available:

- 1) Online dashboard results delivered through Harmoni
 - with the ability to manipulate, interrogate and export the data according to your areas of interest.
- 2) This weekly overview power point report
 - benchmark and longitudinal summary of key data points
 - including extra analysis based on topical questions.
- 3) An infographic of key data points
 - visual representative of results for ease of access.



Example: Harmony Dashboard Page

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, e tc.

Report notes (i)

Key information to note for this report

- This report is based on the six waves of fieldwork:
 - wave 1 data collected Friday 3 April to Wednesday 8 April;
 - wave 2 data collected Thursday 9 April to Tuesday 14 April;
 - wave 3 data collected Thursday 16 April to Monday 20 April;
 - wave 4 data collected Thursday 23 April to Sunday 26 April;
 - wave 5 data collected Thursday 30 April to Sunday 3 May;
 - wave 6 data collected Thursday 7 May to Sunday 10 May;
 - wave 7 data collected Thursday 14 May to Sunday 17 May.
- Total sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves (all conducted under level 4 alert), combined sum of waves 5 and 6 (under level 3 alert), as well as individual waves where appropriate.
- Waves 1–4 of fieldwork were completed under a level 4 alert in New Zealand, waves 5 and 6 were under a level 3 alert and wave 7 under level 2.
- The focus of this report is tracking the 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*' i.e. in February this year.
- At a total population level, significance testing indicated in this wave 7 report is based on a statistically significant shift of results between waves 1 to 7, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results.
- 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 all four waves.

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

	Definition	Waves 1 - 4		Waves 5 - 6		Wave 7	
		Sample	MoE*	Sample	MoE*	Sample	MoE*
Total		n=5,060	1.38	n=2,532	1.95	n=1,263	2.76
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=100	9.8
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=221	6.59
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=100	9.8
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=321	5.47
Any Disability**	See previous page	n=550	4.18	n=297	5.69	n=145	8.14
COVID-19 Vulnerable**	See previous page	n=1,230	2.79	n=597	4.01	n=280	5.86
Aged 70 + years**	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over	n=618	3.94	n=315	5.52	n=148	8.28

*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 Apr | 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.

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 7 deep dive

The seventh wave of fieldwork took place between Thursday 14 and Sunday 17 May, the first weekend under level 2 alert conditions, although it is accepted that a number of the preceding days that respondents were answering for would have been under level 3 conditions.

As New Zealand has moved through to the levels, the proportion of people working from home has declined, but is still some way off from pre-lockdown levels.

Across the course of the lockdown, workers have become more confident that their work place will provide them with the opportunity to work more from home, and this matches an increase in the proportion of workers who would prefer to work from home at least some of the time.

Unsurprisingly, people who report increased flexibility in the workplace express higher levels of preference for working from home.

There are some differences according to the age of the worker and type of household they live in:

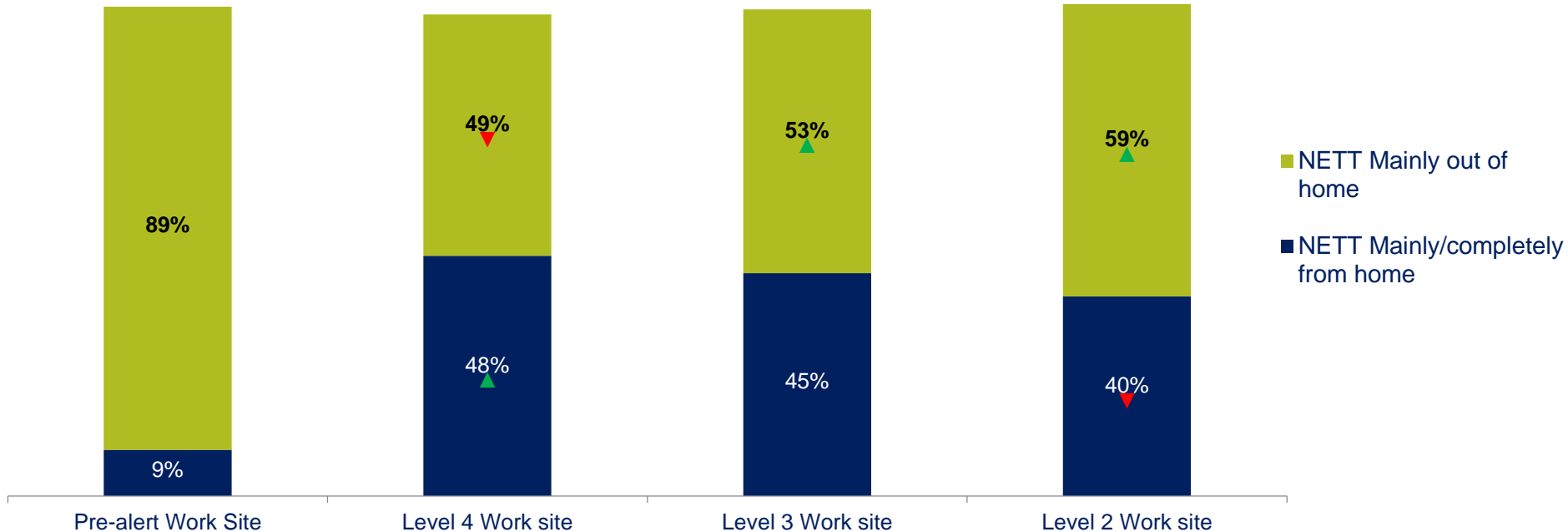
- The preference for working from home tends to increase along with age.
- Households of couples with no children have a significantly higher preference for working from home, whereas people living in shared / flatting households would prefer to work outside the home.



Section 2 – Working from home context

With more opening up, we're beginning to see a shift in the proportion returning to their normal workplace, although there's still a sizable proportion working from home

Proportion working from home



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

Base: all working adults 15+ in New Zealand: benchmark (n=2,305); Level 4 (n=3,081); Level 3 (n=1,568); level 2 (n=760)



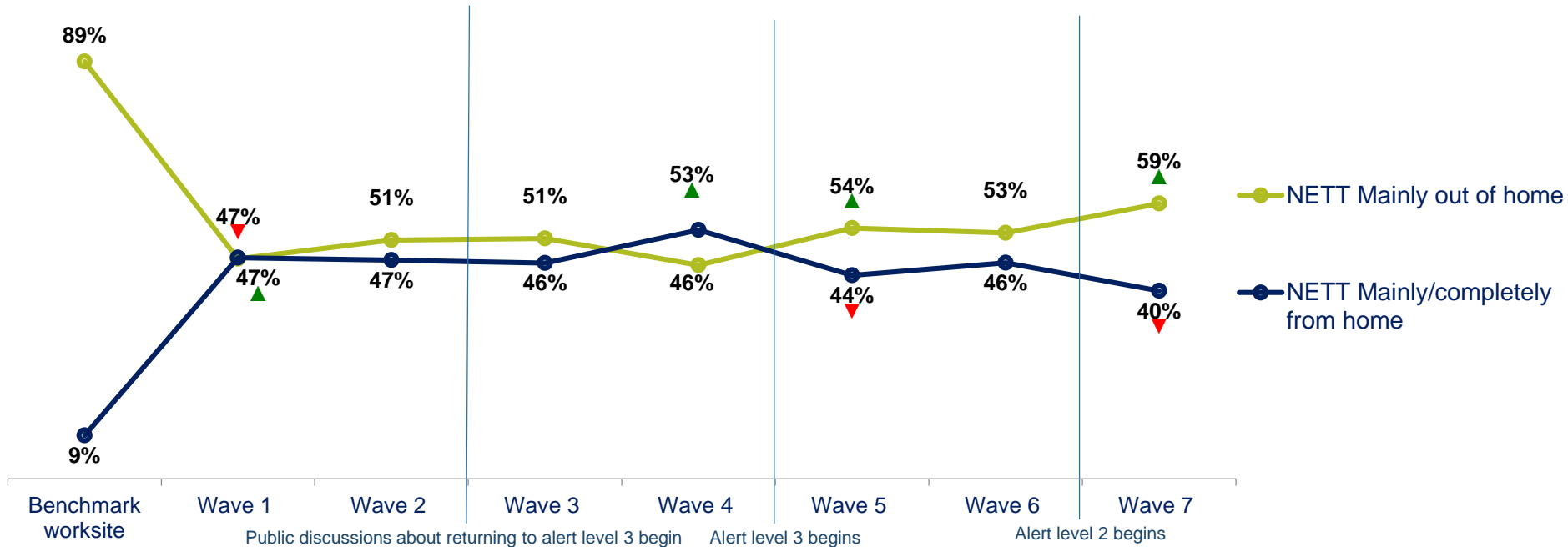
Indicates a statistically significant increase against previous time period



Indicates a statistically significant decrease against previous time period

Only in wave 4 was the proportion working from home greater than the proportion out of home

Proportion working from home



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

Base: all working adults 15+ in New Zealand: benchmark (n=2,305); wave 1 (n=808); wave 2 (n=749); wave 3 (n=748); wave 4 (n=776); wave 5 (n=786); wave 6 (n=782); wave 7 (n=760)

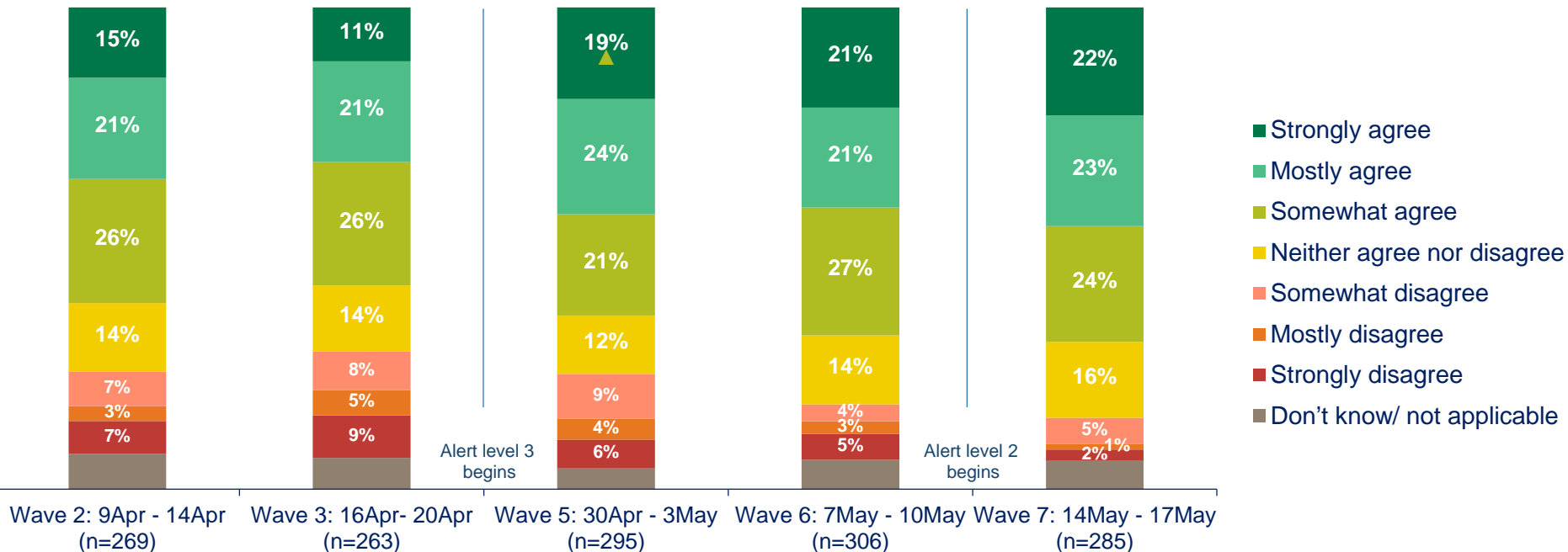




Section 3 – Employers as barriers

There has been a gradual directional increase since the end of level 4 in those agreeing their workplace will be more flexible going forward

“I think my workplace will become more flexible / open to people working from home”



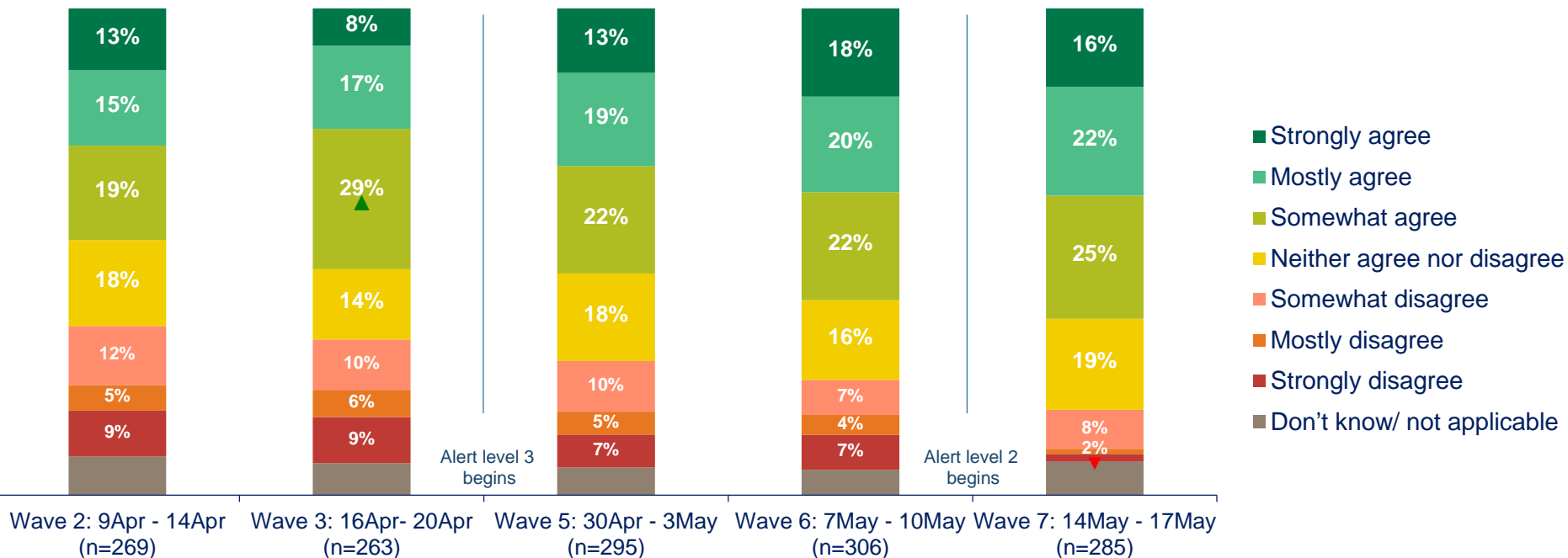
QWORK6A. Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

Base: all currently working from home



Similarly, there's not been a significant increase in the proportion who think their workplace will change, although this remains quite high

"I think my workplace will change how it operates so more people can regularly work from home"



QWORK6A. Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

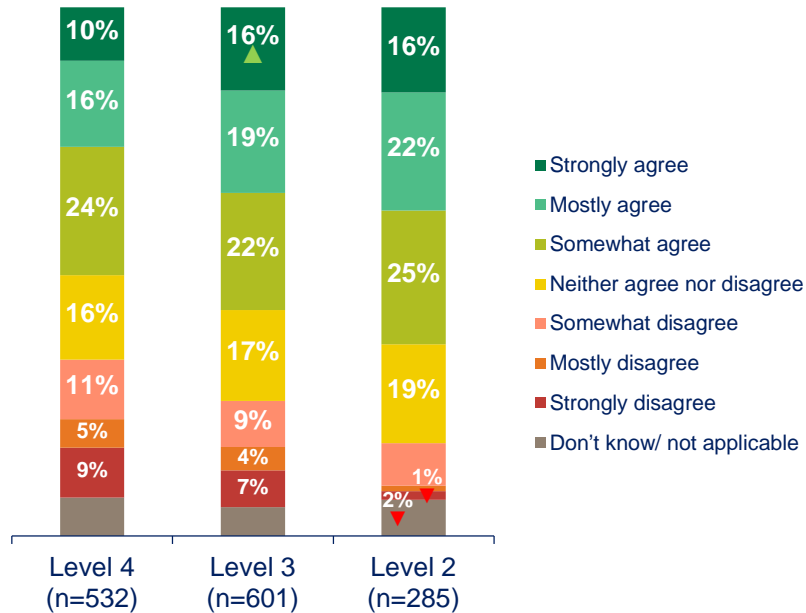
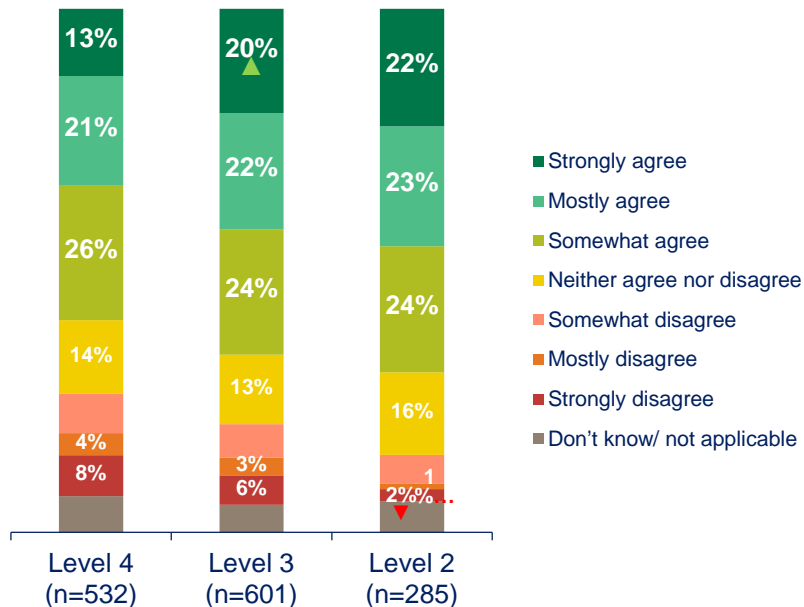
Base: all currently working from home



The directional change in perceived workplace changes is more pronounced when viewed according to alert levels

“I think my workplace will become more flexible / open to people working from home”

“I think my workplace will change how it operates so more people can regularly work from home”



QWORK6A. Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

Base: all currently working from home

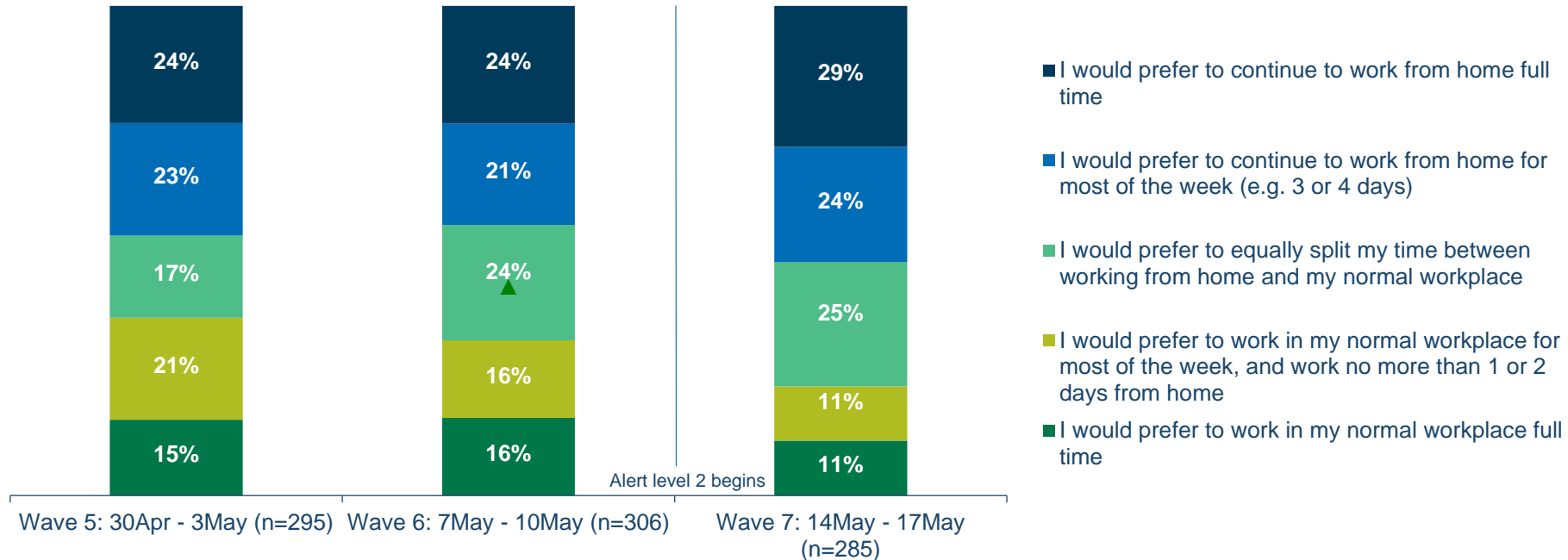




Section 4 – Preferred site and flexibility

On balance, there's been a gradual increase in the proportion who would prefer to continue working from home at least part of the time

Preferred work site by wave



QWORK6B. And thinking about the period immediately following the end of the lockdown, when everyone is permitted to return to the workplace.

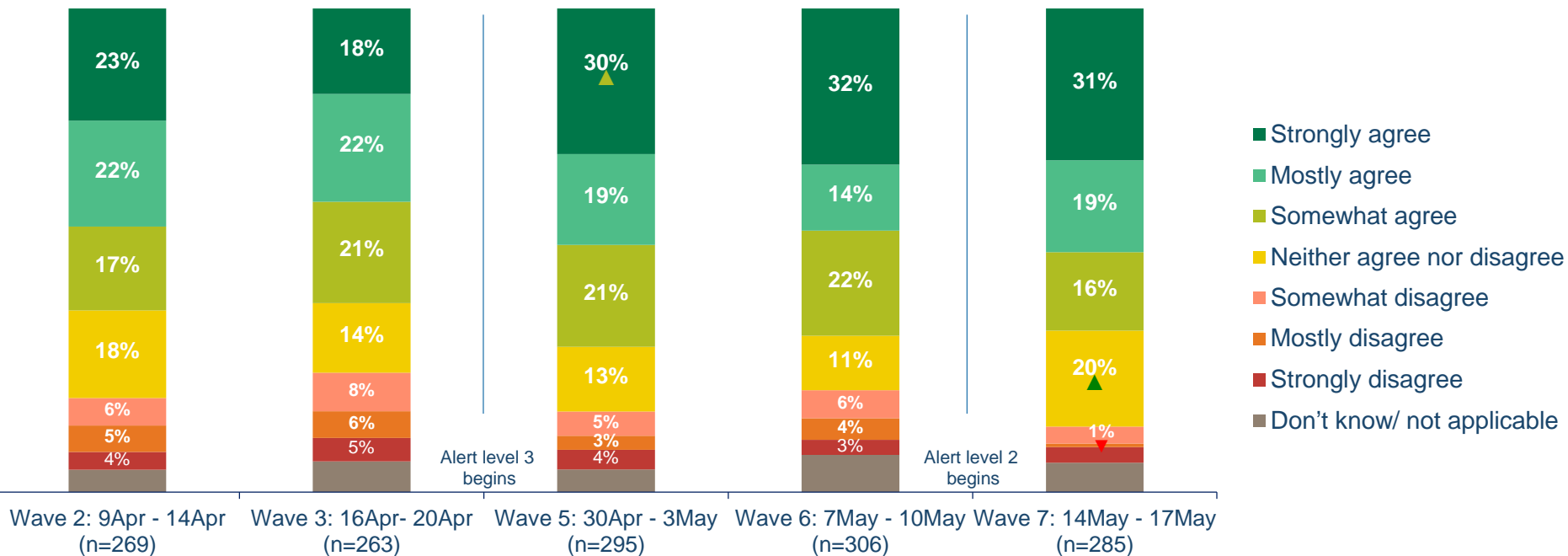
Which of the following applies to you?

Base: all currently working from home



When it comes to desired flexibility, this grew in level 3, but has been at roughly the same level since, although the proportion disagreeing is now at its lowest level

“Now that I’ve experienced it, I would like more flexibility to work from home”



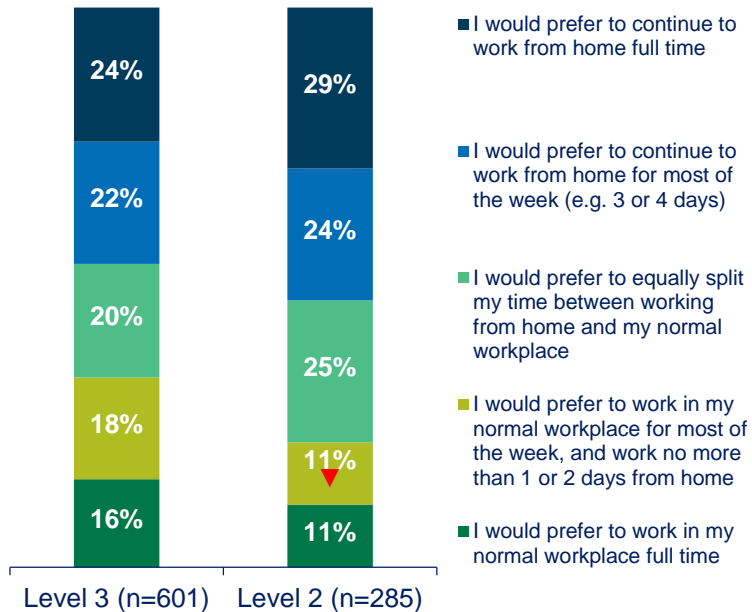
QWORK6A. Thinking now about the future and how people’s work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

Base: all currently working from home

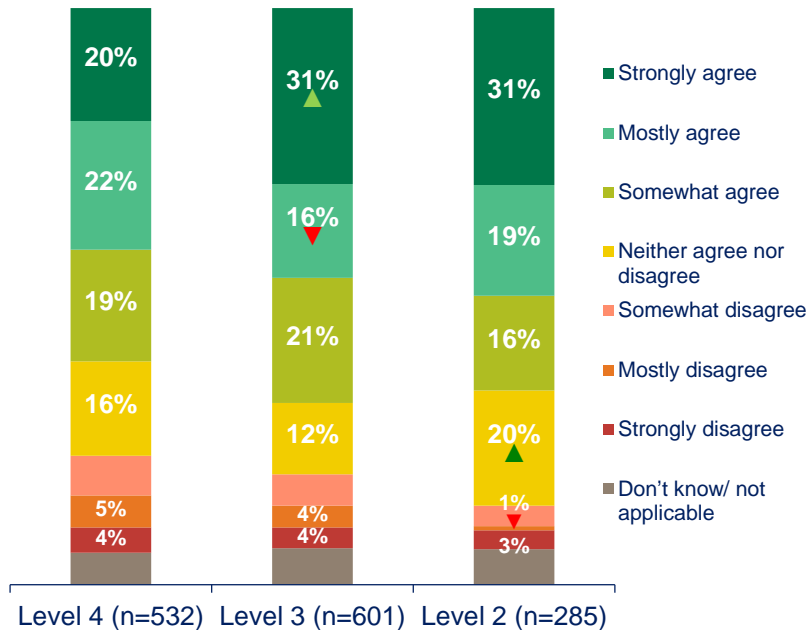


When viewed according to alert level, the apparent increase in desired flexibility primarily manifested in level 3, although as we progress into level 2 this may change

Preferred work site by level



Desire for flexibility by level

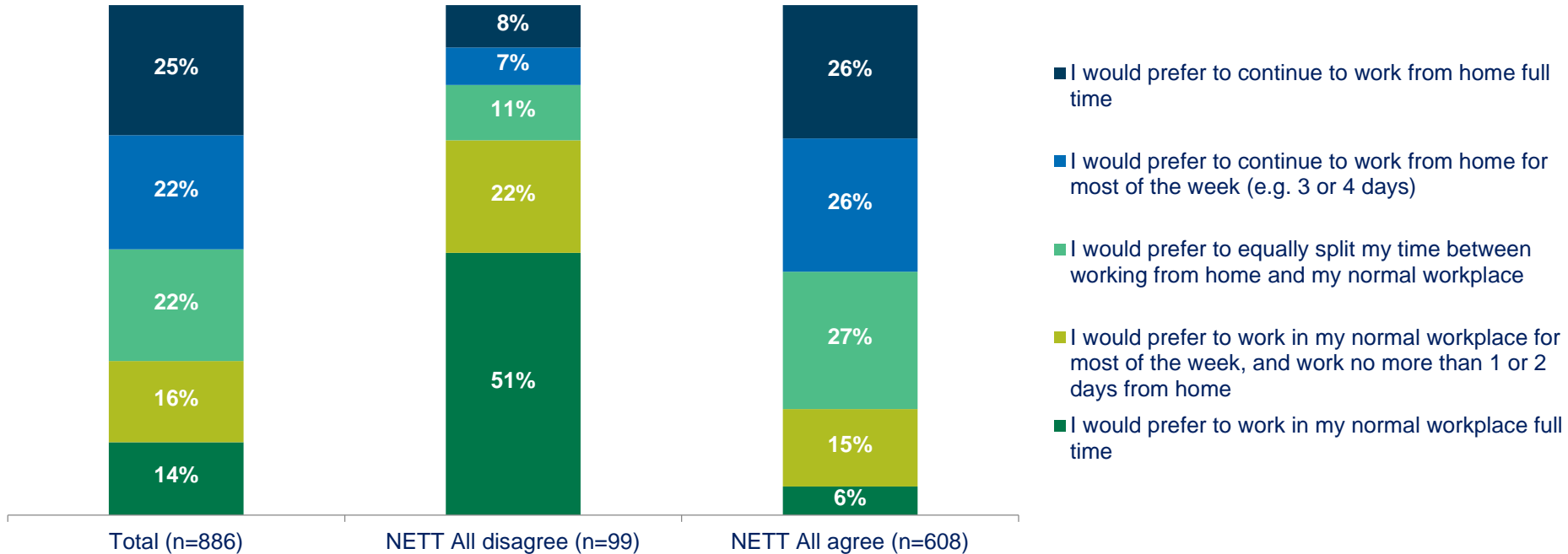


QWORK6A./ QWORK6B. Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements? And thinking about the period immediately following the end of the lockdown, when everyone is permitted to return to the workplace. Which of the following applies to you? Base: all currently working from home



Desire for flexibility correlates with preferences for continued working situation

Preferred work site by desire for flexibility

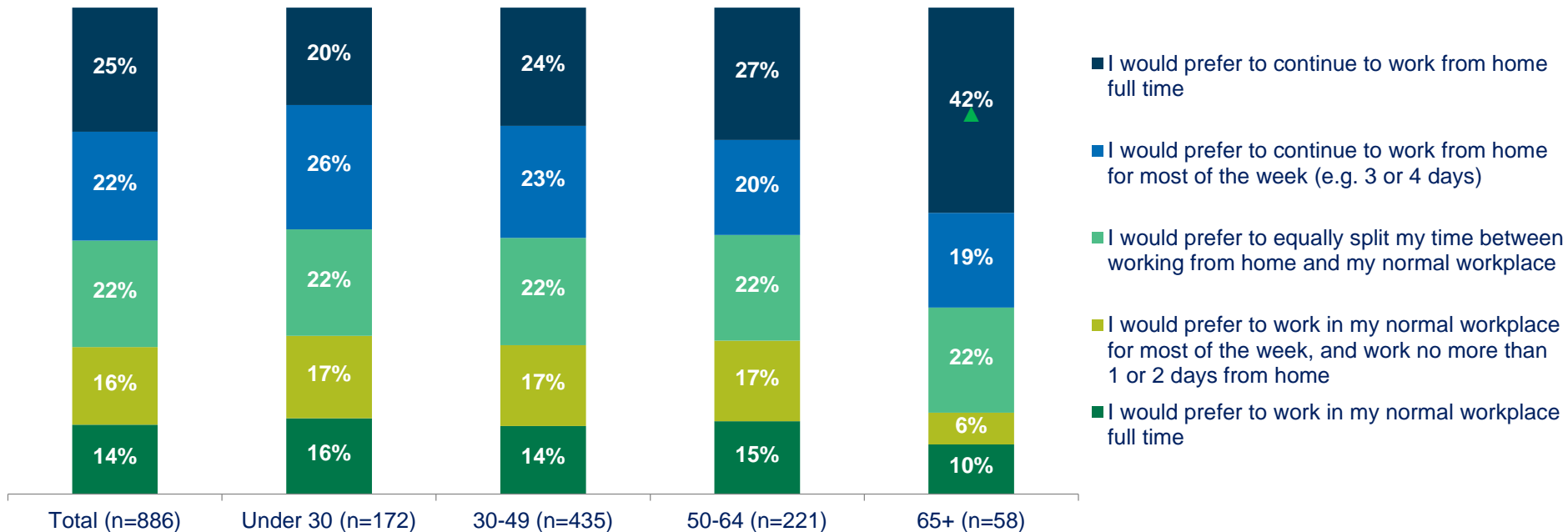


QWORK6A./ QWORK6B. Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements? And thinking about the period immediately following the end of the lockdown, when everyone is permitted to return to the workplace. Which of the following applies to you? Base: all currently working from home



Age doesn't have a particularly marked impact, although working from home is preferred by those at the older end of the workforce

Preferred work site by age



QWORK6B. And thinking about the period immediately following the end of the lockdown, when everyone is permitted to return to the workplace.

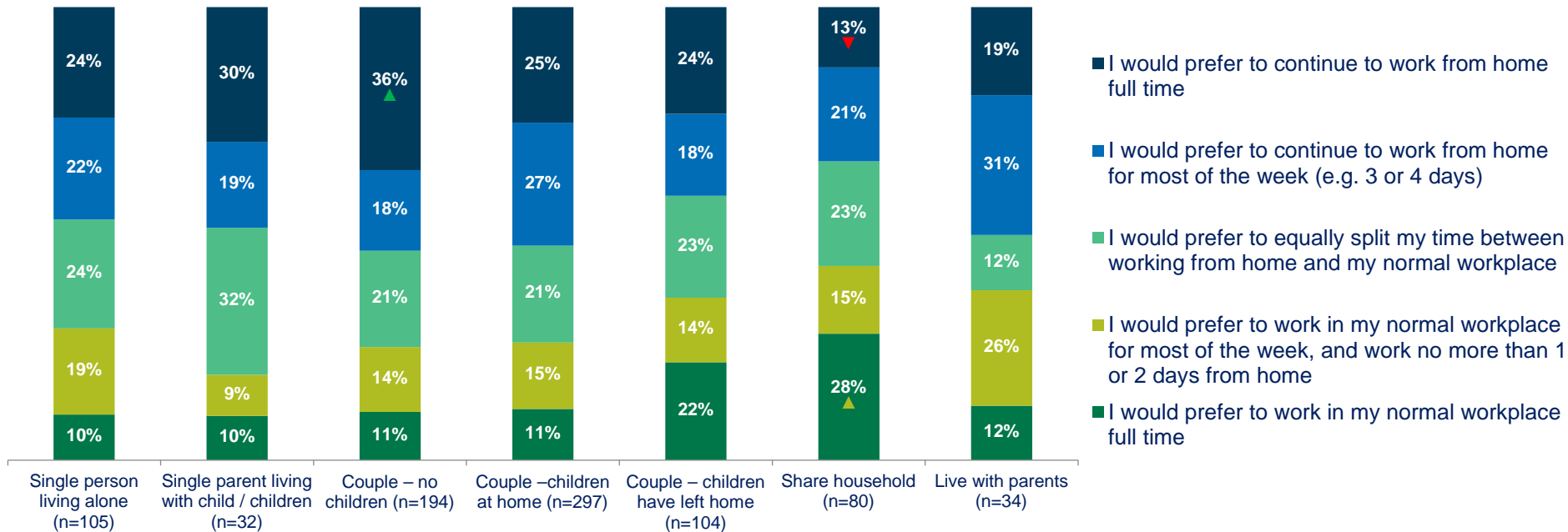
Which of the following applies to you?

Base: all currently working from home



Household composition is one of the few demographics to have an impact on preference, with childless couples more like to prefer working from home full-time

Preferred work site by household composition



QWORK6B. And thinking about the period immediately following the end of the lockdown, when everyone is permitted to return to the workplace.

Which of the following applies to you?

Base: all currently working from home



