

Waka Kotahi COVID-19 transport impact

Fieldwork wave 30 deep dive analysis
Working from home
28 June 2023

Disclaimer

This presentation is based on research currently being undertaken by Ipsos on behalf of Waka Kotahi NZ Transport Agency.

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.

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COVID-19 transport impact

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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

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.

The latest wave of research is to help understand some of the enduring changes that have occurred due to the pandemic such as increased working from home and the slow return to public transport.

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 $\sim n=1259$ 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.

*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 three weeks after wave 21. Waves 23–30 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, m ask ownership, etc.

Report notes (i)

Key information to note for this report

- This report is based on 30 waves of fieldwork (see table on next slide).
- 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 30 report is based on a statistically significant shift of results between waves 1 to 30, 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.

Report notes (ii)

Key fieldwork dates

Wave	Dates of fieldwork	Alert level	Wave	Date of fieldwork	Alert level
1	Friday 3 April to Wednesday 8 April	Alert Level 4	16	Thursday 30 July to Sunday 2 August	
2	Thursday 9 April to Tuesday 14 April		17	Thursday 20 August to Sunday 23 August	Alert Level 3 (AKL) / Alert Level 2 (Rest of NZ)
3	Thursday 16 April to Monday 20 April		18	Thursday 27 August to Sunday 30 August	
4	Thursday 23 April to Sunday 26 April		19	Thursday 3 September to Sunday 6 September	Alert Level 2.5 (AKL) / Alert Level 2 (Rest of NZ)
5	Thursday 30 April to Sunday 3 May	Alert Level 3	20	Thursday 17 September to Sunday 20 September	
6	Thursday 7 May to Sunday 10 May	Alert Level 2	21	Thursday 24 September to Sunday 27 September	Alert Level 2 (AKL) / Alert Level 1 (Rest of NZ)
7	Thursday 14 May to Sunday 17 May		22	Thursday 15 October to Sunday 18 October	Alert Level 1
8	Thursday 21 May to Sunday 24 May		23	Thursday 12 November to Sunday 15 November	
9	Thursday 28 May to Monday 1 June		24	Thursday 4 March to Monday 8 March*	Alert Level 3 (AKL) / Alert Level 2 (Rest of NZ)
10	Thursday 4 June to Sunday 7 June	Alert Level 1	25	Thursday 20 May to Monday 24 May	Alert Level 1
11	Thursday 11 June to Sunday 14 June		26	Thursday 2 September to Monday 6 September**	Alert Level 4 (AKL) / Alert Level 3 (Rest of NZ)
12	Thursday 18 June to Sunday 21 June		27	Thursday 10 March to Monday 14 March 2022	Covid Protection Framework, Red light, phase 2
13	Thursday 25 June to Sunday 28 June		28	Thursday 26 May to Tuesday 31 May	Covid Protection Framework, Orange
14	Thursday 2 July to Sunday 5 July		29	Thursday 3 November to Tuesday 8 November	No restrictions on travel, Covid Protection Framework ended
15	Thursday 16 July to Sunday 19 July		30	Thursday 25 th May to Tuesday 30 th May 2023	Covid Protection Framework ended

*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.

Report notes (iii)

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.

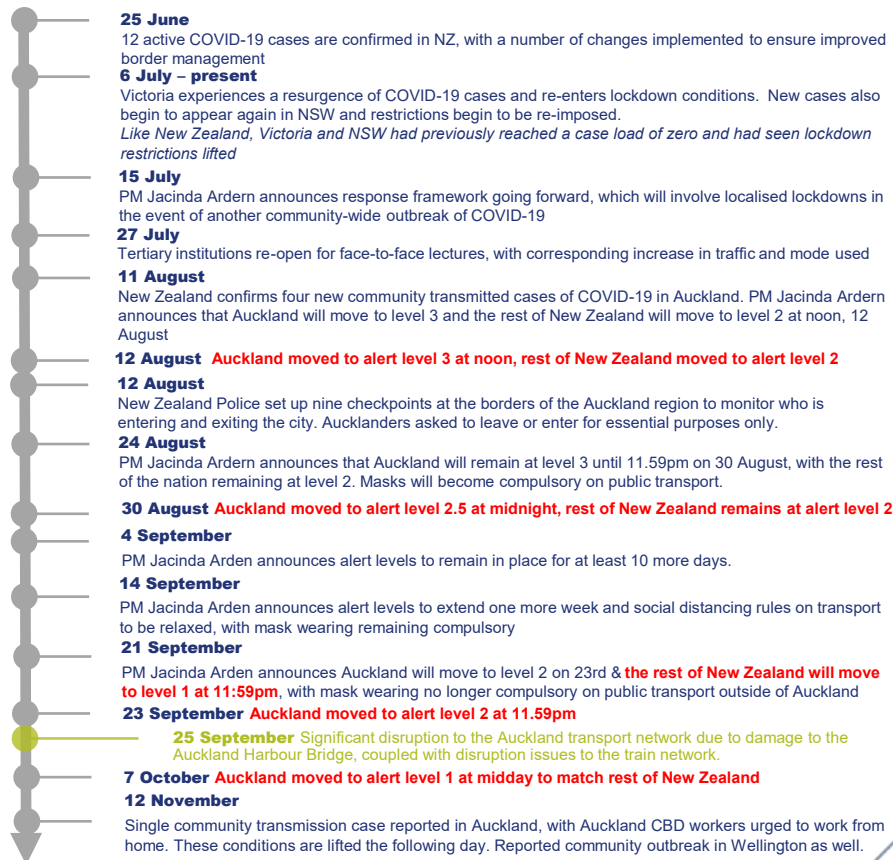
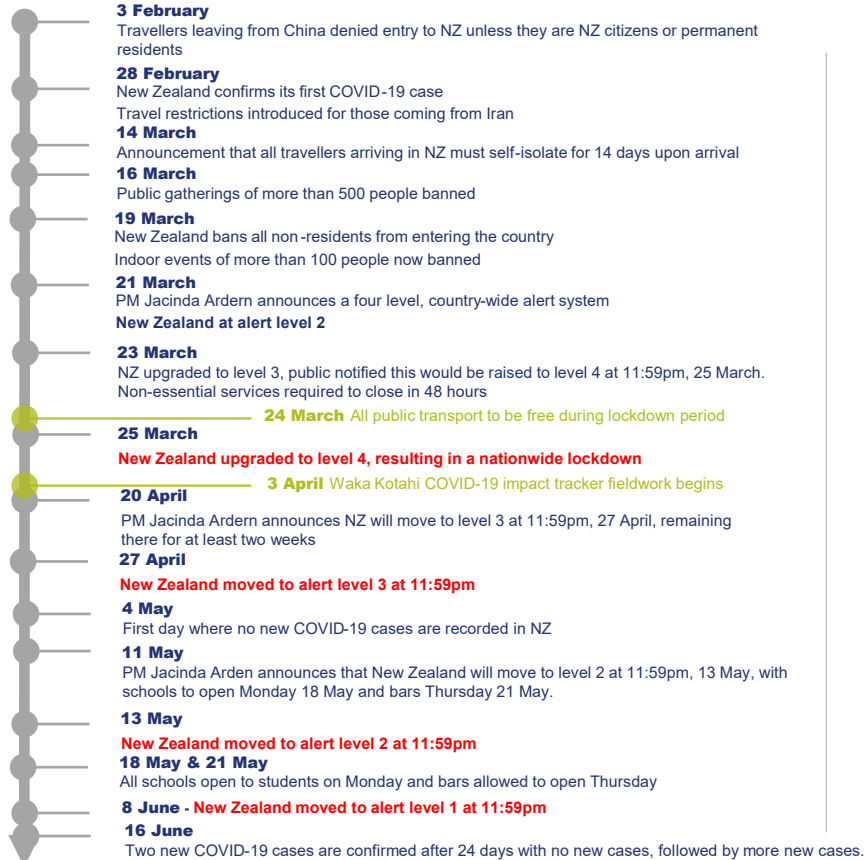
Sample structure and further definitions

		Total	Region of residence							Disability, Vulnerability and COVID-19**		
Wave	Display variable		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
Wave 30	Sample	n=1,231	n=310	n=99	n=100	n=171	n=100	n=100	n=351	n=166	n=264	n=216
	MOE*	2.79	5.57	9.85	9.8	7.49	9.8	9.8	5.23	7.61	6.03	6.67

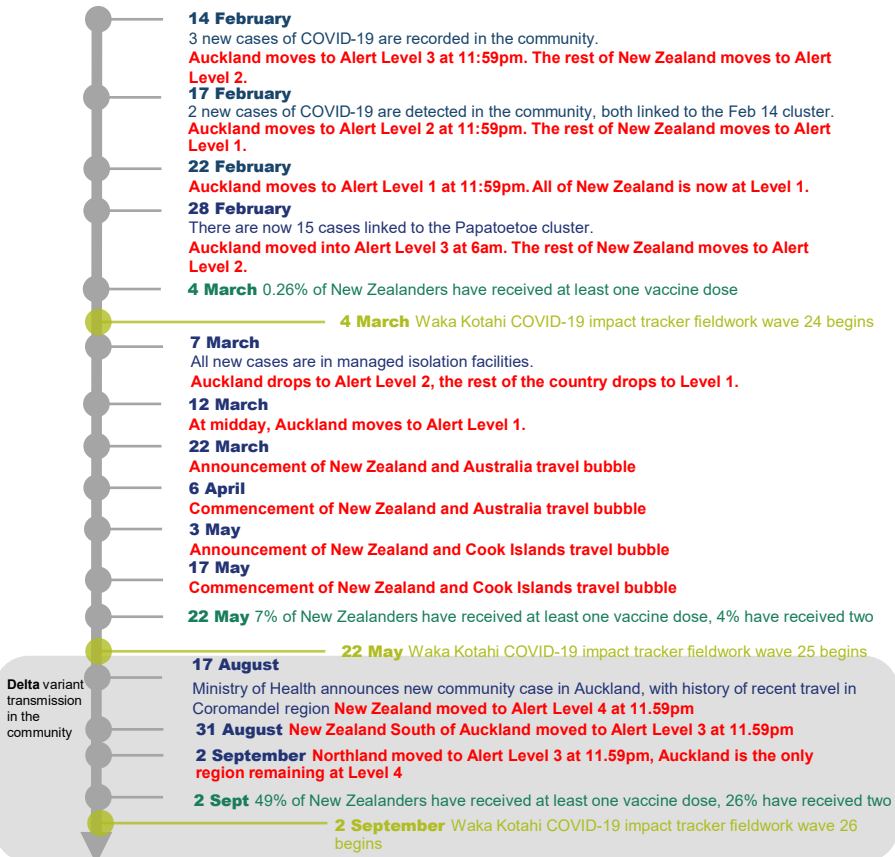
*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 April 12:44pm.

**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



7 September

From 11.59pm., New Zealand moves to Alert Level 2.
Auckland moves remains at Alert level 4.

21 September

From 11.59pm., Auckland and Upper Hauraki move to Alert Level 3.
The rest of New Zealand remain at Alert Level 2.

25 September

From 11.59pm., Upper Hauraki moves to Alert Level 2.
Auckland remains at Alert Level 3. The rest of the country remains at Alert Level 2

3 October

From 11.59pm., additional areas in the Waikato move to Alert Level 3 for 5 days.
Auckland remains at Alert Level 3. The rest of New Zealand remains at Alert Level 2

5 October

From 11.59pm., Auckland eases Alert Level 3 restrictions.
Some areas within the Waikato remain at Alert Level 3. The rest of New Zealand remains at Alert Level 2

7 October

From 11.59 pm., further extension of the Waikato Alert Level 3 boundary
Auckland remains at Alert Level 3 with some restrictions eased. The rest of New Zealand remains at Alert Level 2.

8 October

From 11.59pm., Northland moves to Alert level 3.
Auckland and parts of the Waikato remain in Alert Level 3. The rest of New Zealand remains at Alert Level 2.

15 October

PM Jacinda Ardern announces NZ will soon move to COVID-19 Protection Framework

19 October

From 11.59pm., Northland moves to Alert level 2.
Auckland and parts of Waikato remain at Alert Level 3. The rest of New Zealand remains at Alert Level 2.

27 October

Parts of the Waikato at Alert Level 3 move to Step 1 of Alert Level of Level 3
Auckland remains at step 1 of Alert Level 3. The rest of New Zealand remains at Alert Level 2.

2 November

Upper Northland moves to Alert Level 3. From 11.59 pm., Parts of the Waikato at Alert level 3 move to Alert Level 3 Step 2.
Auckland remains at Step 1 of Alert Level 3. The rest of New Zealand remains at Alert level 2.

9 November

From 11.59 pm., Auckland moves to Alert Level 3 Step 2. Upper Northland remains at Alert Level 3.
Parts of the Waikato remain at Alert Level 3 Step 1. The rest of New Zealand remains Alert Level 2.

11 November

Upper Northland moves to Alert Level 2.
Auckland and parts of the Waikato remain at Alert Level 3, The rest of New Zealand remain at Level 2.

16 November

Parts of the Waikato move to Alert Level 2.
Auckland remains at Alert Level 3 Step 2. The rest New Zealand remains at Level 2.

Cumulative vaccination data sourced from 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 the 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 the 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

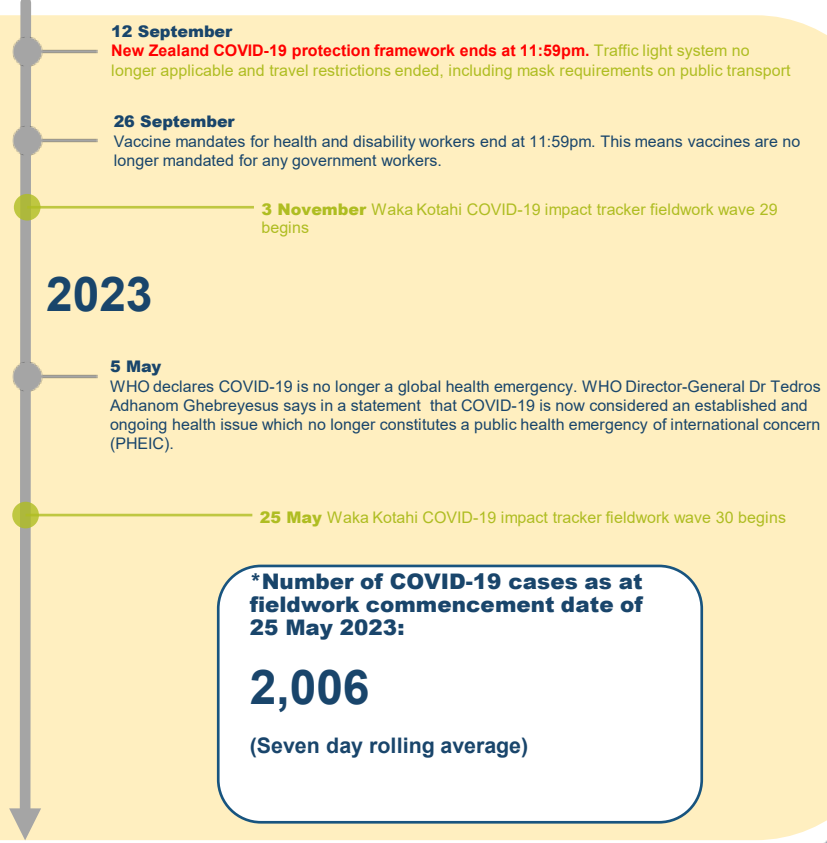
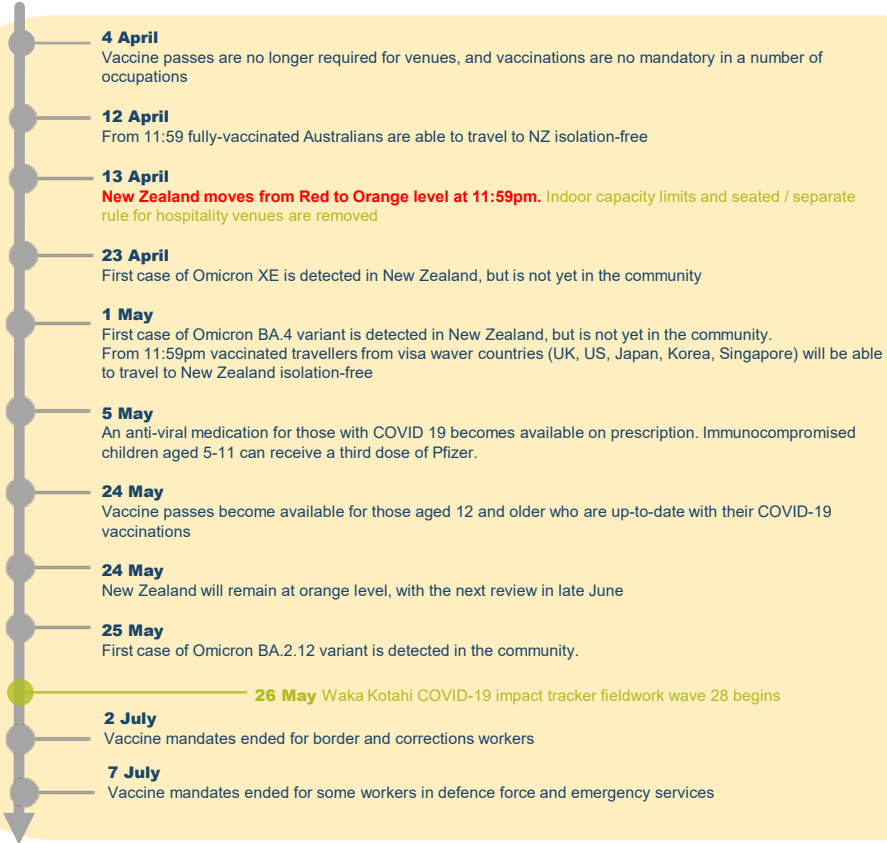
Limits on outdoor gatherings are removed, limits on indoor gatherings changed from 100 to 200. QR code scanning and signs are no longer required

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

Cumulative vaccination data sourced from health.govt.nz on 14.09.2021

Context: New Zealand COVID-19 timeline – 2022 /23

Omicron variant transmission in the community



***Number of COVID-19 cases as at fieldwork commencement date of 25 May 2023:**

2,006

(Seven day rolling average)

*https://covid19.health.nz/advice/covid-19-data?_ga=2.58090666.1228266669.1686267647-700430694.1686267647

Deep dive analysis

Emergent stories and trends

- Since the outbreak of COVID-19 in New Zealand, the context in which people live and travel has continued to evolve, with changing restrictions from alert levels and protection frameworks to emergent narratives in society and long-term changes in behaviour patterns.
- Deep dive analysis delivered as part of this research enables 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.
- **Working from home** has been selected as a deep dive because it is an enduring change that has occurred due to the pandemic and public transport users are more likely to work from home. Public transport patronage has been suppressed by the pandemic and it is useful to understand some of the potential causes in more detail.

Summary

Wave 30 deep dive – working from home (WFH)

The 30th wave of fieldwork took place between Thursday 25th and Monday 29th May 2023.

This deep dive is designed to investigate how various employee and employer factors work to encourage or discourage the practice of working from home. This is a practice that we already know to impact Public Transport patronage disproportionately. However, by understanding the balance of these behavioural drivers, it may be possible to project how this demand will change and if the transport network should be prepared for more week-day users.

Context

Working from home remains consistent at around 20% of the working population, more than double the pre-COVID rates and possibly reflecting a new normal base-level of this behaviour.

Employee desire factors

As the practice of working from home has settled at 20%, the interest from workers in the practice also seems consistent at a little over 60%. Around 40% indicate preference for on-site work, but there is not much variance in desire factors by commuter groups. PT users are slightly more enthusiastic about the idea, but desire to work from home is common across all modes.

Employee capability factors

Stated capability to work from home remains high at over 60%, but workers have gradually become less confident they can make the case for it since May 2022. In this area, there is a big difference between commuter groups, with PT commuters significantly more confident in their capabilities. This is reflected in the higher share of this group saying they can do most of their work this way.

Employer enablement factors

Compared to March 2022, the proportion saying that their workplace has changed to enable more people to work from home has declined by 11 percentage-points but is still high. Employers may have become less active in encouraging the practice, but greater than three in five say that their workplace has become more flexible on the practice. The proportion of PT commuters strongly agreeing that they have flexibility and enablement is more than double that of active mode and private vehicle commuters.

Employer barrier factors

These factors have only been measured in wave 30, so it is not possible to say if they have become more prevalent. It is apparent that they are not particularly common to date, but the most common of these factors is set limits on number of days WFH per week. This is also slightly more common for PT commuters, but private vehicle commuters are more likely to say that they don't know about such factors, or they're not applicable. Workplaces where this practice is more commonplace may have engaged more with setting policies around it, so having a limit on days may not be a barrier, but a reflection of an infrastructure which recognises the practice.



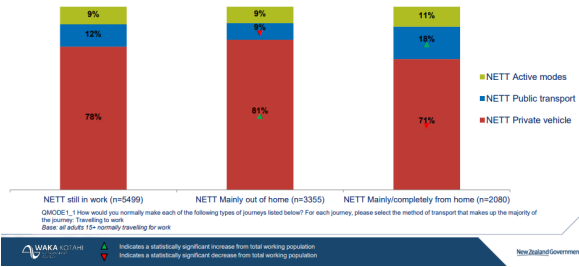
Section 2 – What we already know

Rates of working from home emerged as one of the enduring changes resulting from COVID-19, investigated frequently in depth to establish a few core truths

Commuter traffic deep dive: June 2020

Working from home had a much larger impact on public transport usage than loss of employment or working hours

Normal commuting travel by current working location

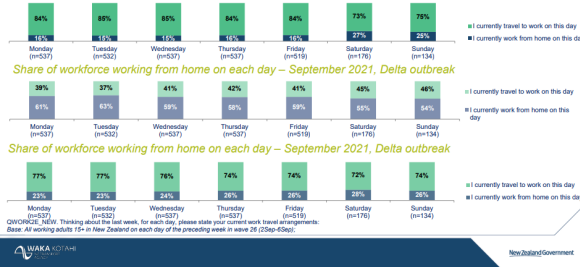


As early as June 2020, it was established that Public Transport is disproportionately impacted by commuters working from home. With PT commuters more often in jobs that allow them to work remotely.

Core report: November 2022

On each week day, the proportion of workers working from home is 7-10 points higher than it would have been pre-COVID

Share of workforce working from home on each day – pre-covid



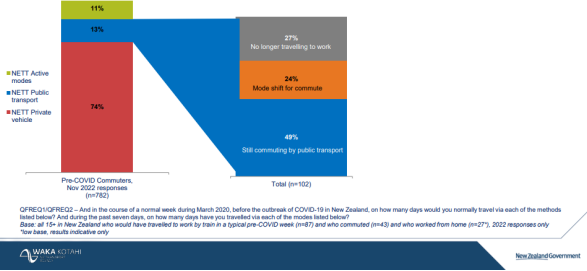
As time has gone on, results from COVID-19 impact tracking shows a persistent WFH population, resulting in a 4-6 percentage - point reduction in the proportion of people commuting on each weekday.

WFH deep dive: November 2022

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

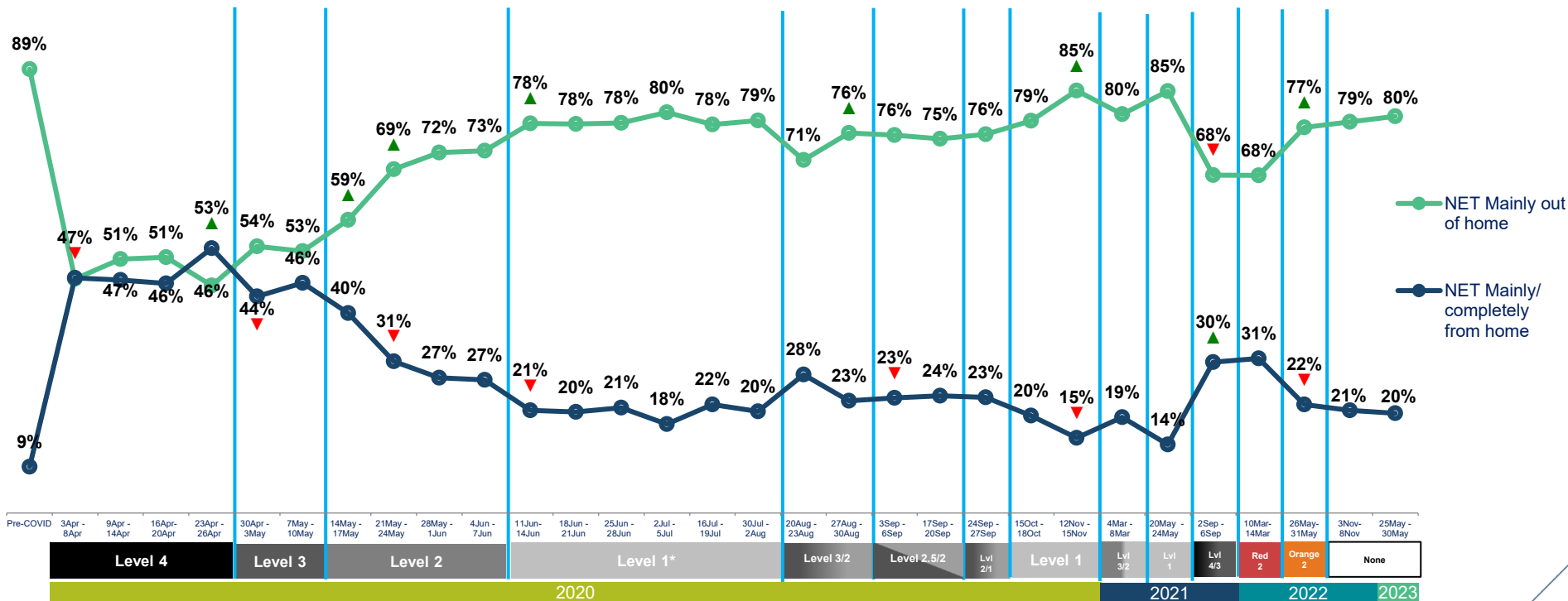
Past week activity of pre-COVID PT commuters



Other factors, such as pre-COVID commuters stopping work and general mode shift are in play, but the cumulative impact by November '22 was a 17 percentage - point reduction in the PT commuter population.

The proportion working from home during the past week is comparable to November and Level 1 restrictions in 2020, but still more than double the pre-COVID rate

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



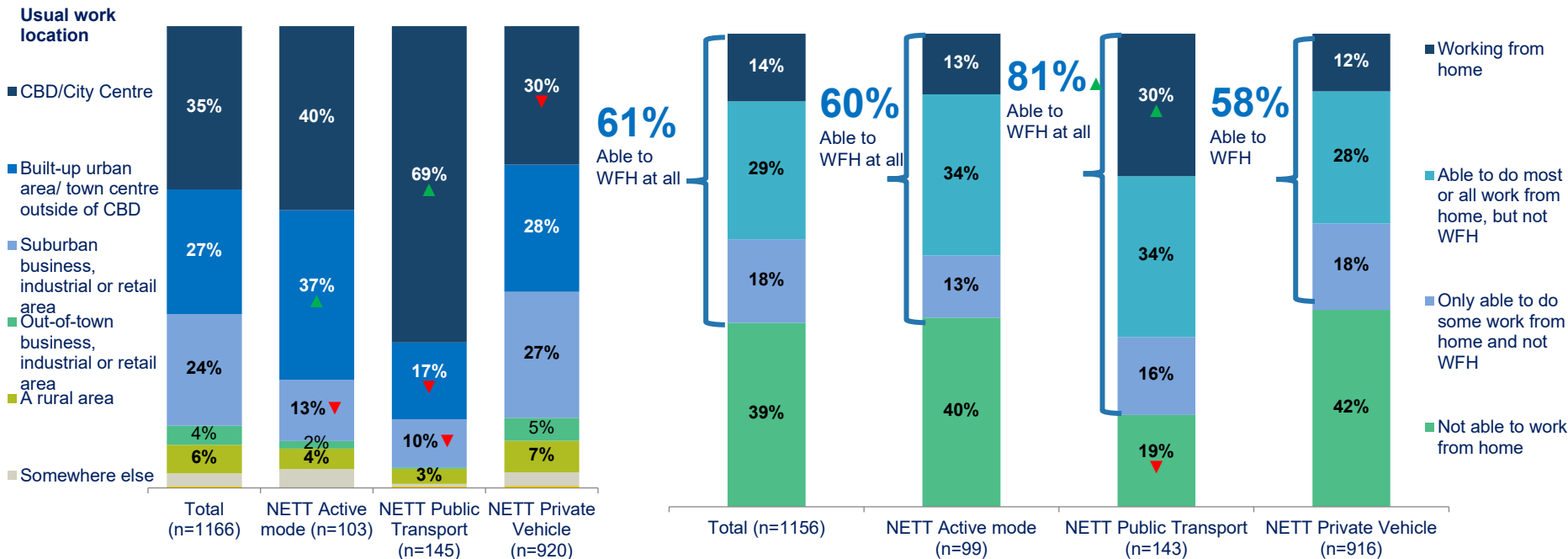
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

High rates of PT commuters WFH correspond with high feasibility: 4-in-5 can WFH and most work jobs in built-up urban areas where office and clerical work is common

Actual WFH rates and feasibility



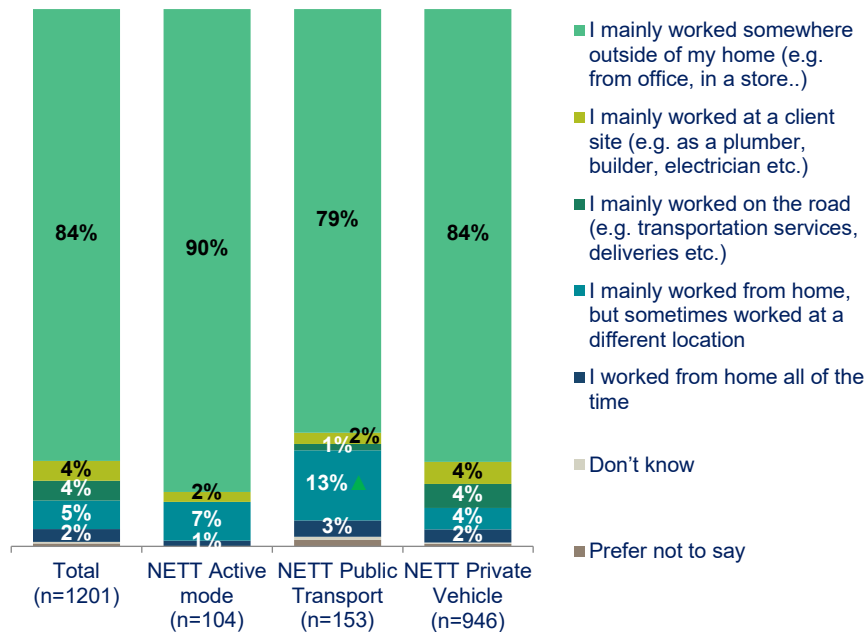
QWORK1_DEST – usual work location/QWORK2A/2D-Current worksite & ability to work from home

Base: all working adults 15+ in New Zealand who commuted by each mode in the past week November 2022 & May 2023

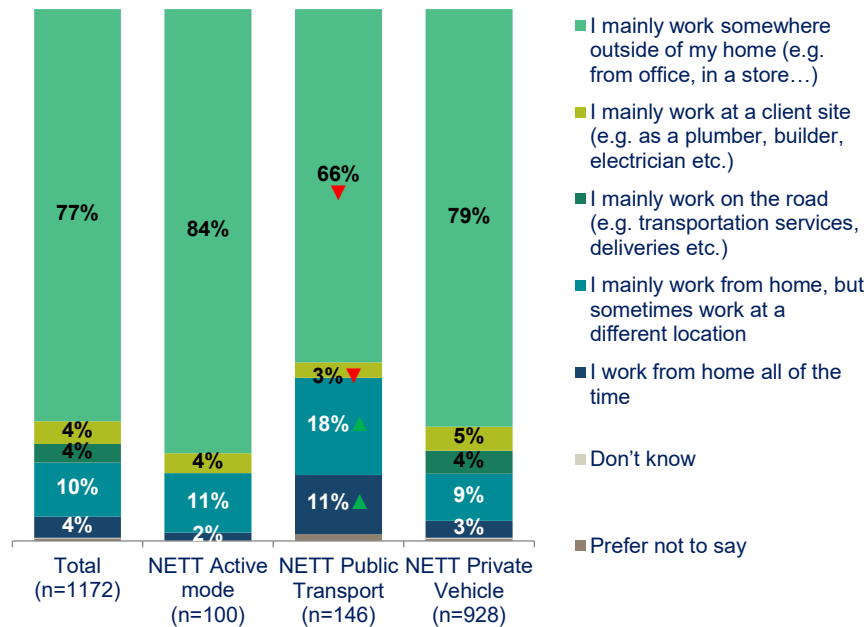


PT commuters have seen a greater shift towards full time working from home, but partial working from home is much more common in all groups than before COVID

Pre-COVID work site



Current work site



QWORK1A/2A – pre covid work site and current work site

Base: all working adults 15+ in New Zealand who commuted by each mode in the past week November 2022 & May 2023



Indicates higher than total working population to statistically significant extent



Indicates lower than total working population to statistically significant extent

It is not guaranteed that WFH will continue at the same rate and this could impact transport network needs in future, to this end we measure three groups of factors:

Factors impacting WFH behaviours

I want to do it

Employee desire

- I would like more flexibility to work from home
- My preference would be to only work from home as a last resort

I can do it

Employee capability

- I think I could make a good case for working from home (more) in the future if I wanted.
- I'm (confident/more confident now) that I have the ability to work from home productively
- I am (now) set up at home to be able to work more flexibly from home

They will help me do it

Employer enablement

- 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

They will stop me from doing it

Employer barriers

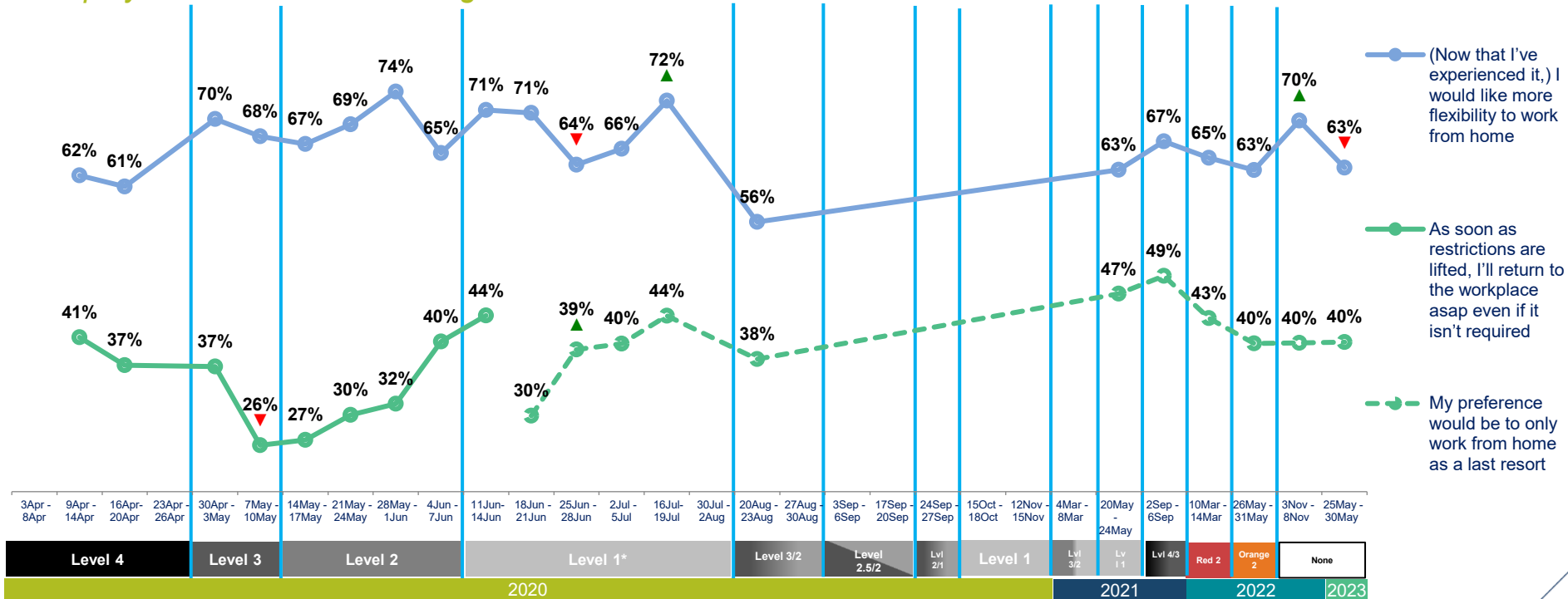
- My workplace has set limits on the number of days that they will allow you to work from home
- My workplace is offering incentives for people to work on-site or in-office
- My employer has denied at least some of my working from home requests recently
- My employer now has stricter criteria/conditions for working from home



Section 3 – Employee desire factors

Consistently around three in five workers want more flexibility, with around two in five expressing a preference not to work from home.

Employee desire factors – all agree



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements? Base: all adults 15+ in New Zealand who have worked from home, or who have the capability to work from home

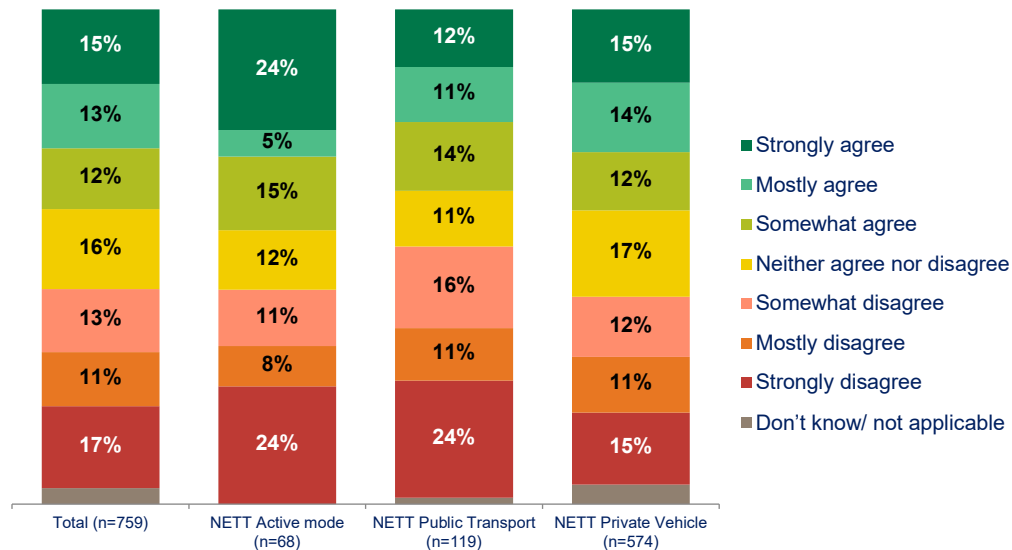
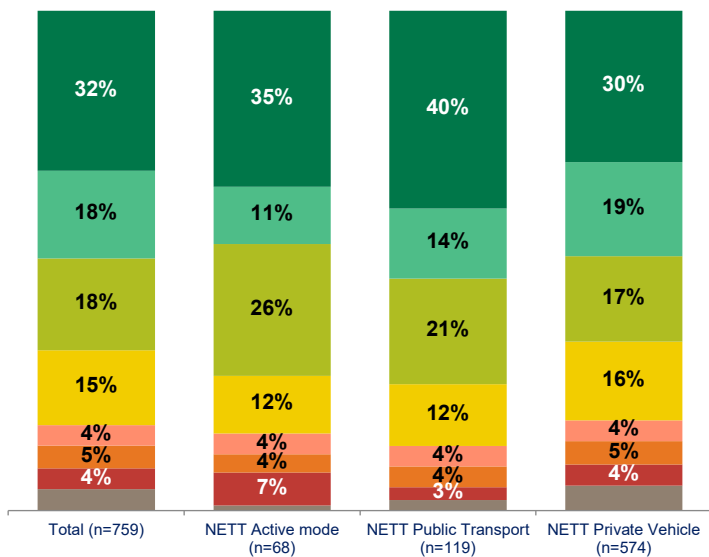


Desire for flexibility is a little stronger for PT commuters, but common across all groups. Active mode commuters have slightly stronger preference for on-site work.

Employee desire factors by commuting mode

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

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



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?
 Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

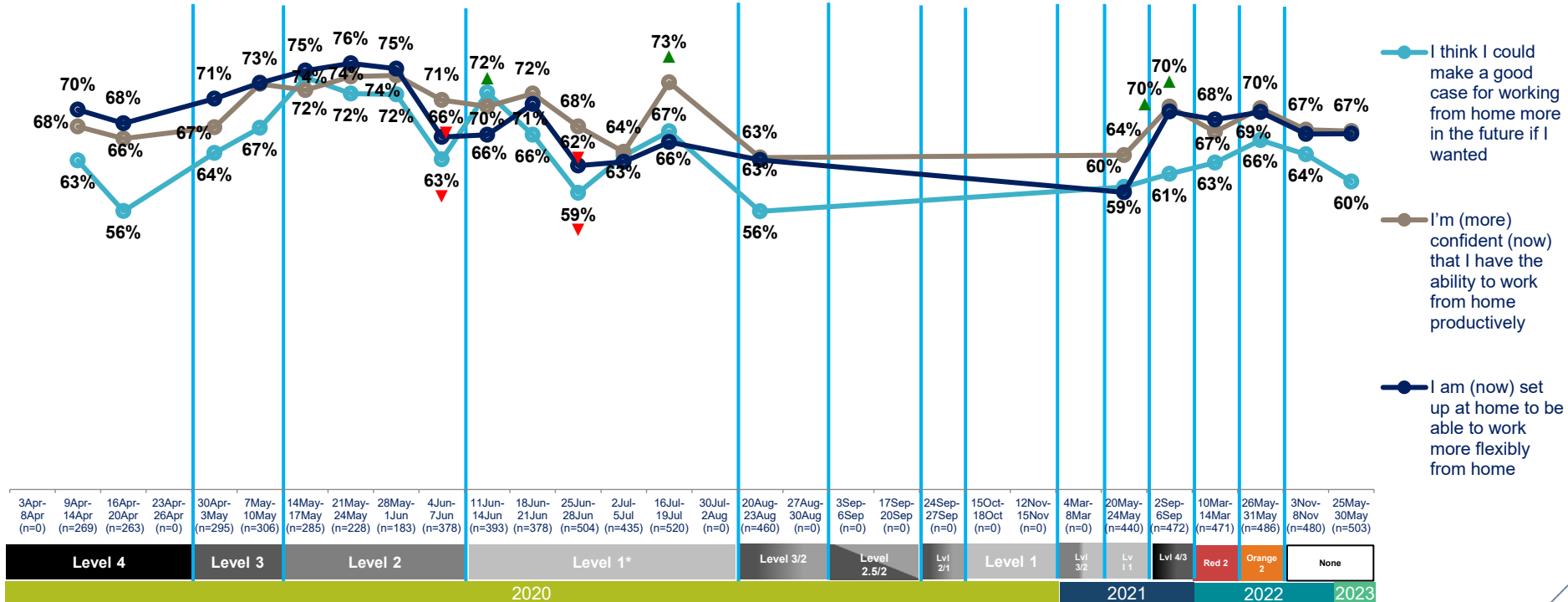




Section 4 – Employee capability factors

Most workers agree that they have confidence in their productivity and setup, and could make a good case for working from home

Capability factors – all agree



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements? Base: all adults 15+ in New Zealand who have worked from home, or who have the capability to work from home



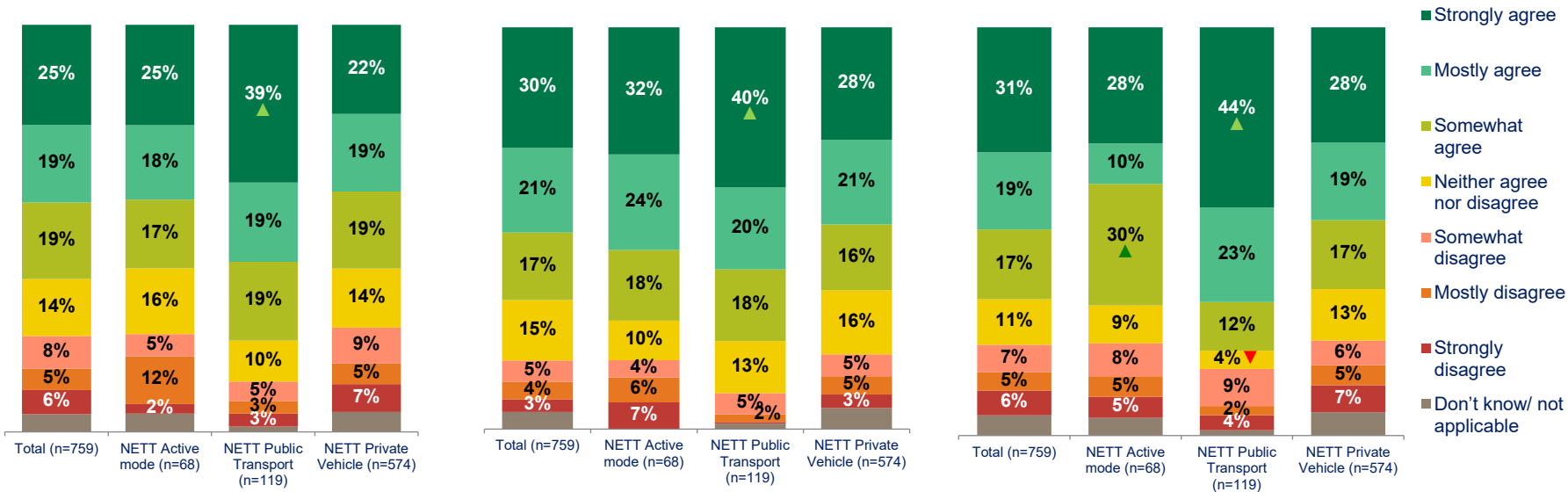
There is clear variance in capability factors: PT commuters are significantly more confident in their capabilities and set up

Employee capability factors by commuting mode

I think I could make a good case for working from home (more) in the future if I wanted

I'm (more) confident (now) that I have the ability to work from home productively

I am (now) set up at home to be able to work more flexibly from home



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?

Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

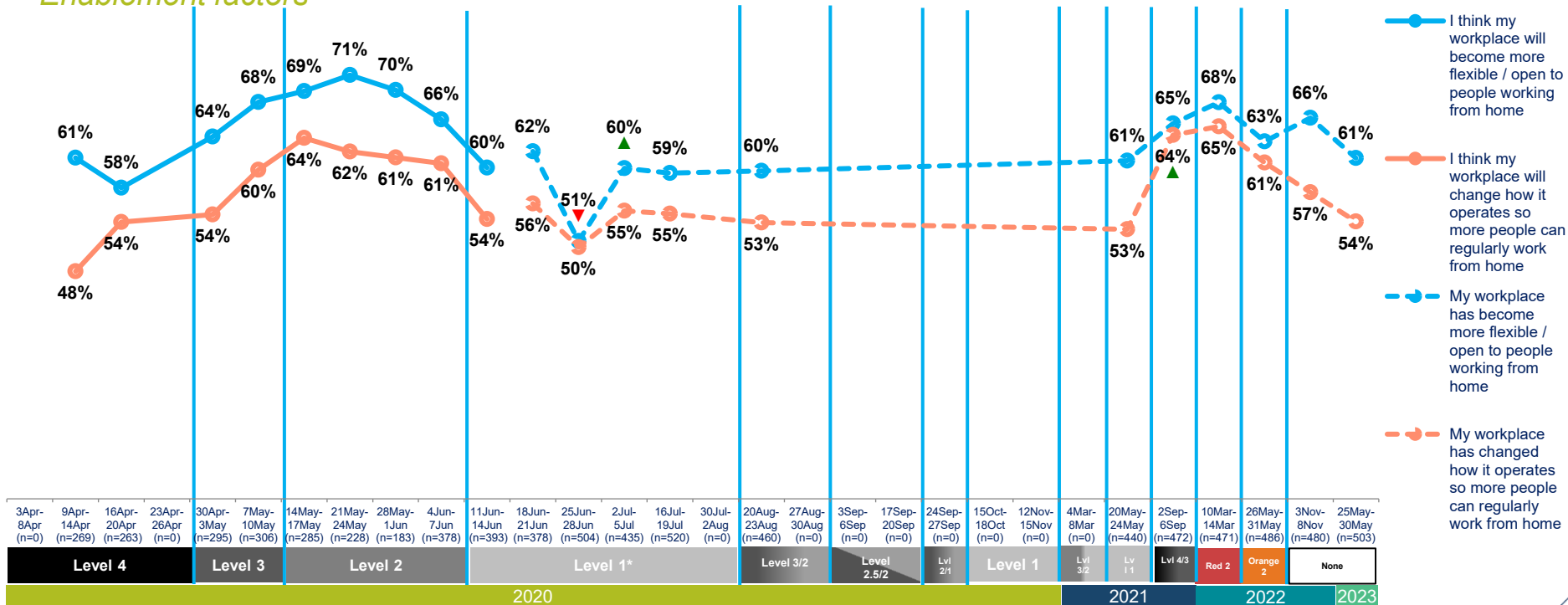




Section 5 – Employer enablement factors

The proportion who think their workplace has changed to enable WFH has been steadily declining since early 2022

Enablement factors



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements? Base: all adults 15+ in New Zealand who have worked from home, or who have the capability to work from home

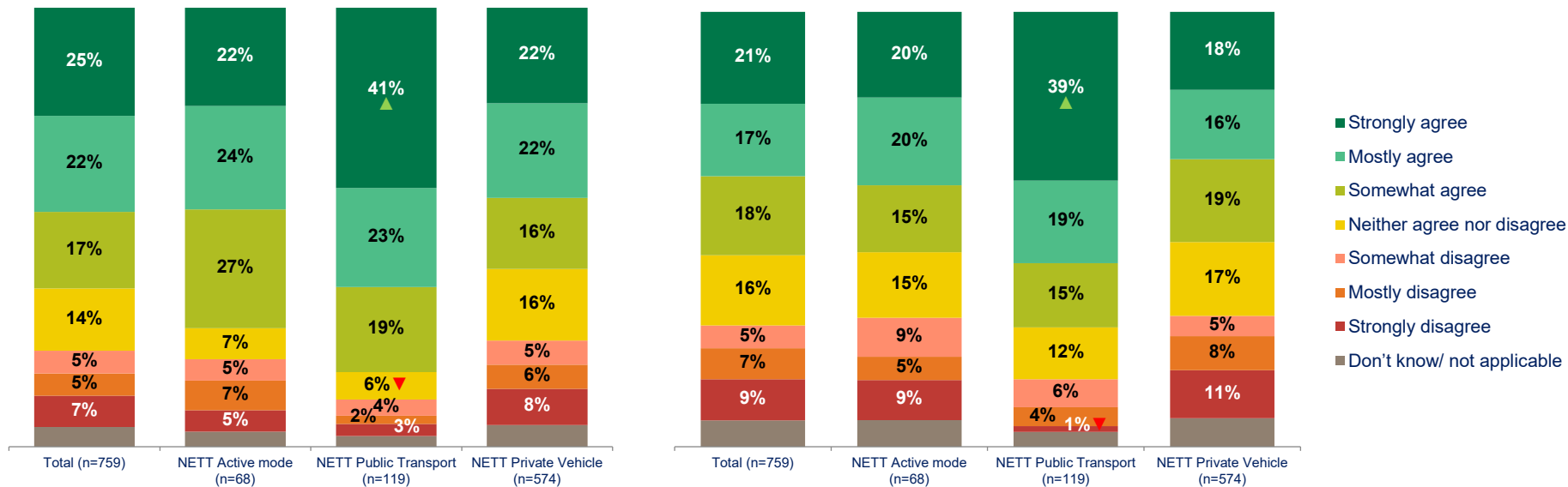


Those with high capability also agree they have greater employer enablement: more than four in five PT commuters agree their workplace has become flexible

Employer enablement factors by 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 work from home



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?

Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

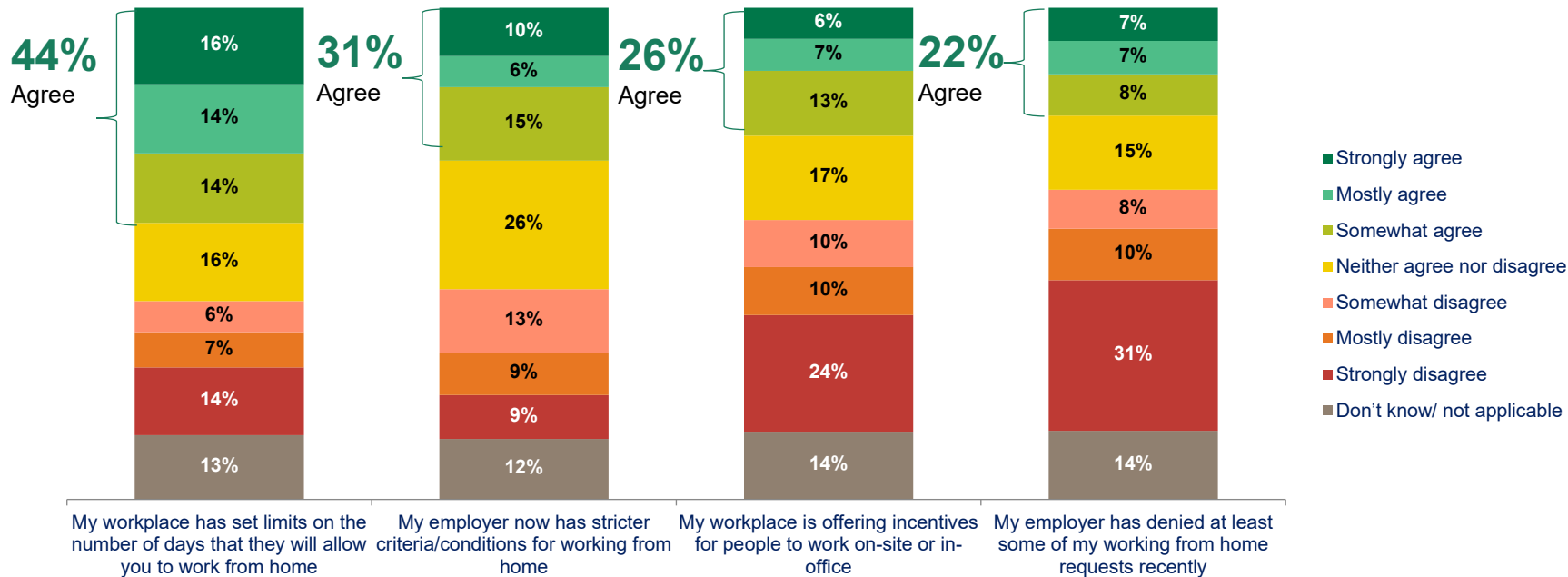




Section 6 – Employer barrier factors

Limits on WFH days are the most common employer barriers. Compared to other factors workers are more likely to say they don't know, or they are not applicable

Employer barrier factors – wave 30 only



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?

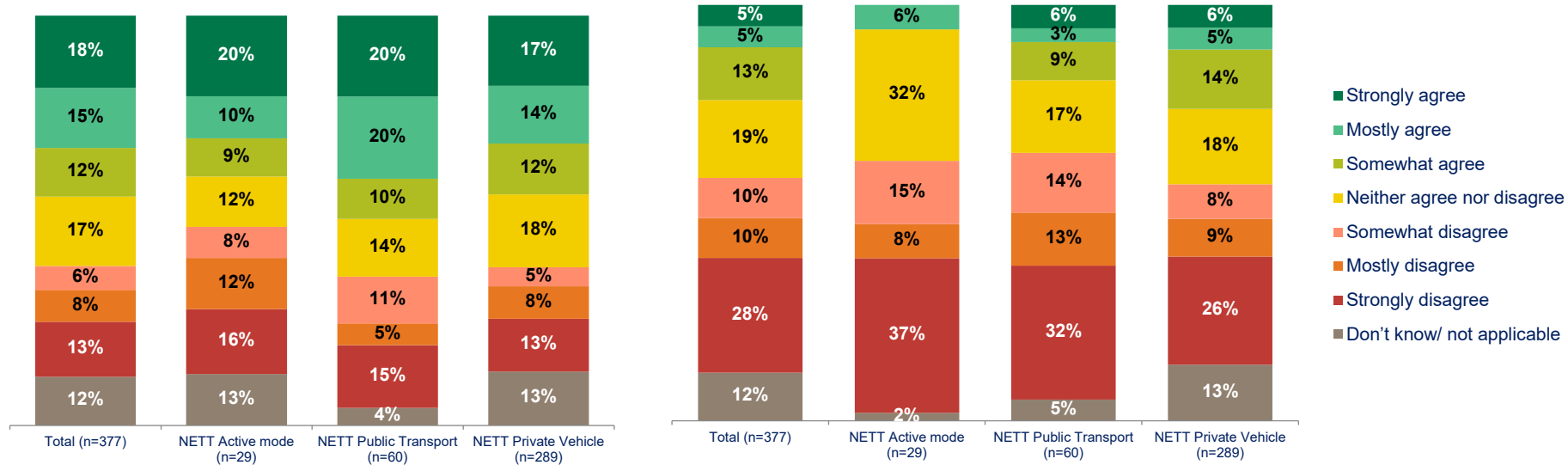
Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home, May 2023 (n=503)

Incentives for working on-site are relatively uncommon, but PT commuters are most likely to say that their workplace has a set limit on WFH days

Employer barrier factors by commuting mode

My Workplace has set limits on the number of days that they will allow you to work from home

My workplace is offering incentives for people to work on-site or in-office



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?
 Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

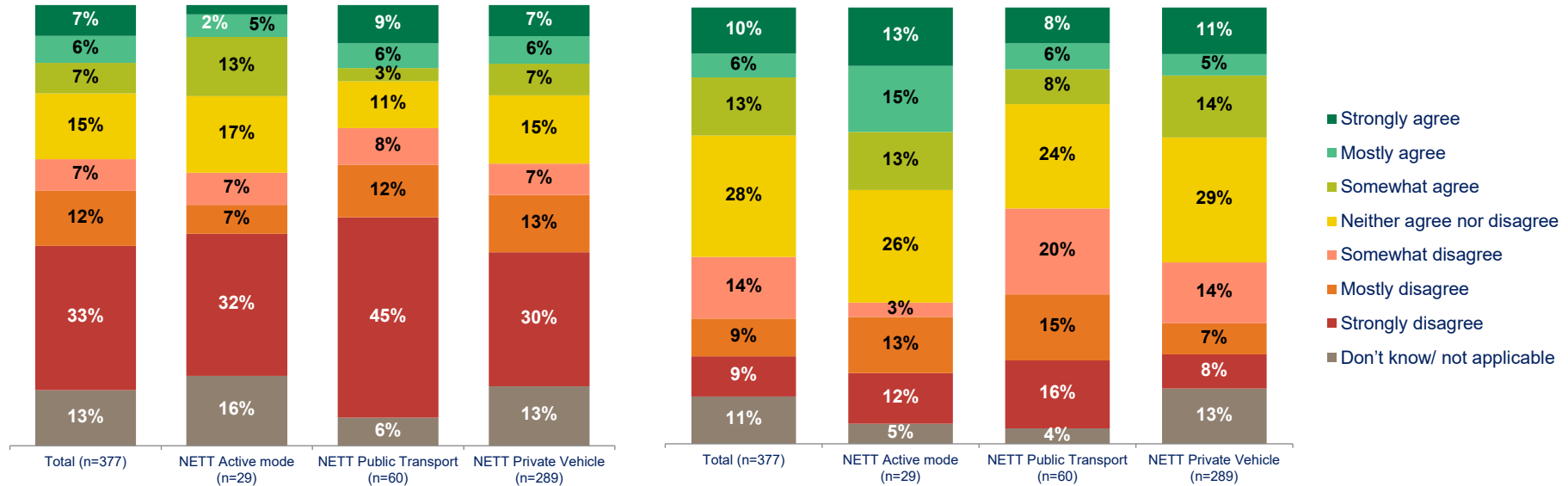


PT commuters are least likely to say that they don't know or a factor is not applicable, this might reflect more formalised WFH policies in their workplaces

Employer barrier factors by commuting mode

My employer has denied at least some of my working from home requests recently

My employer now has stricter criteria/conditions for working from home



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?
 Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

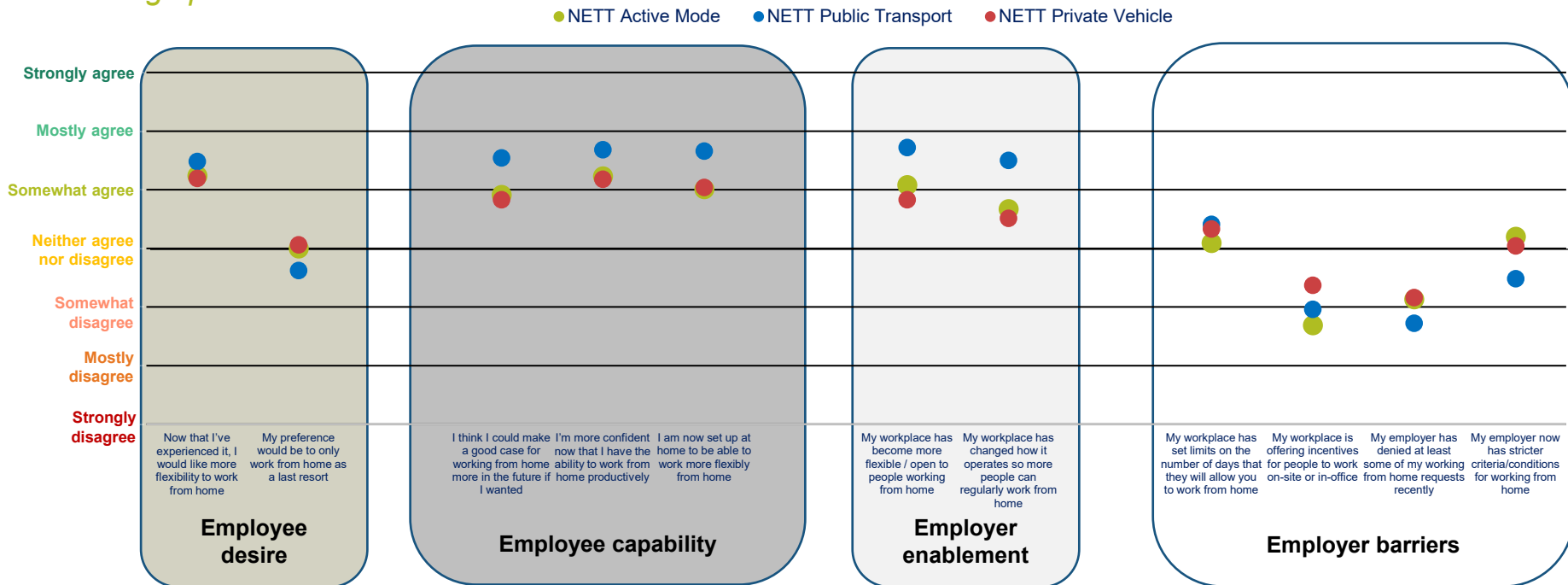




Section 7 – Overview of factor prevalence

There is little difference in desire by commuter group. PT commuters have stronger capability and enablement – possibly reflecting more engaged employers

Average position on factors



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?

Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

Agreement does not always mean the same thing, for some factors, in some cases it indicates more likely to WFH and in some cases less likely

Average position on factors

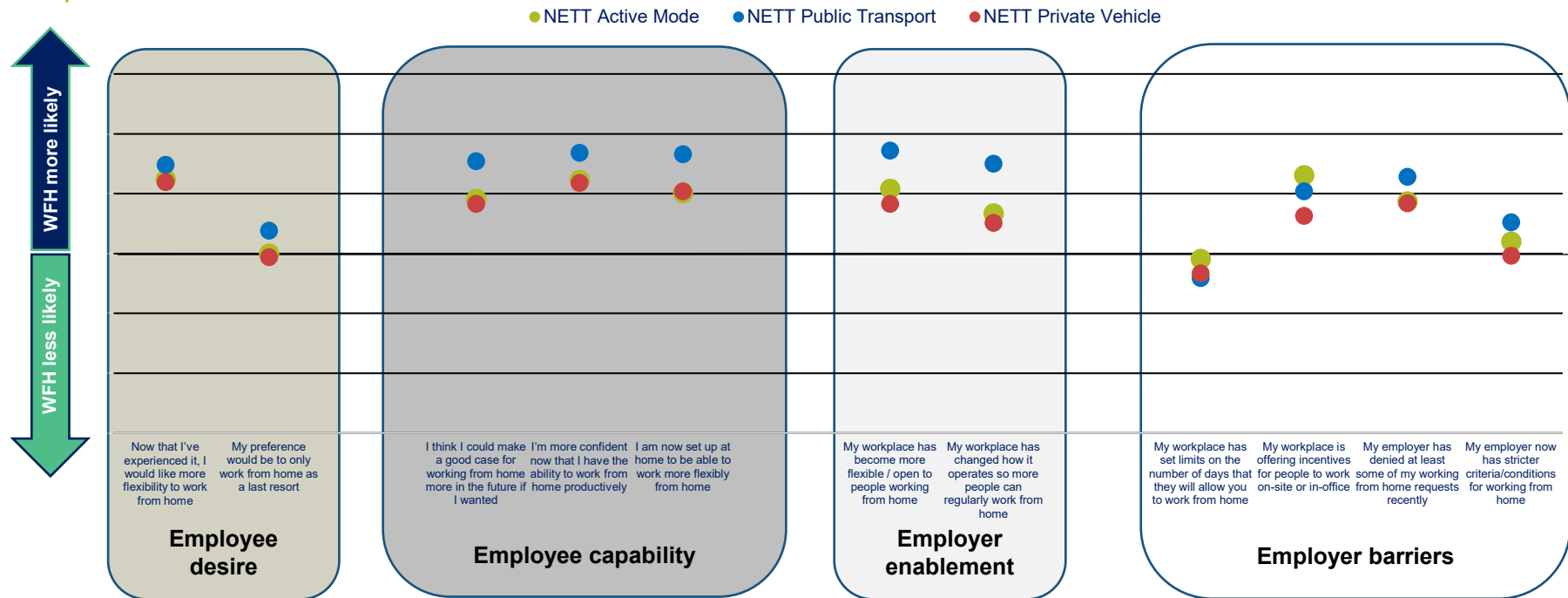
	Employee Desire		Employee Capability			Employer enablement		Employer barriers			
	Now that I've experienced it, I would like more flexibility to work from home	My preference would be to only work from home as a last resort	I think I could make a good case for working from home more in the future if I wanted	I'm more confident now that I have the ability to work from home productively	I am now set up at home to be able to work more flexibly from home	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	My workplace has set limits on the number of days that they will allow you to work from home	My workplace is offering incentives for people to work on-site or in-office	My employer has denied at least some of my working from home requests recently	My employer now has stricter criteria/conditions for working from home
Strongly agree	Much more likely	A lot less likely	Much more likely	Much more likely	Much more likely	Much more likely	Much more likely	A lot less likely	A lot less likely	A lot less likely	A lot less likely
Mostly agree	More likely	Less likely	More likely	More likely	More likely	More likely	More likely	Less likely	Less likely	Less likely	Less likely
Somewhat agree	A little more likely	A little less likely	A little more likely	A little more likely	A little more likely	A little more likely	A little more likely	A little less likely	A little less likely	A little less likely	A little less likely
Neither agree nor disagree	No impact either way	No impact either way	No impact either way	No impact either way	No impact either way	No impact either way	No impact either way	No impact either way	No impact either way	No impact either way	No impact
Somewhat disagree	A little less likely	A little more likely	A little less likely	A little less likely	A little less likely	A little less likely	A little less likely	A little more likely	A little more likely	A little more likely	A little more likely
Mostly disagree	Less likely	More likely	Less likely	Less likely	Less likely	Less likely	Less likely	More likely	More likely	More likely	More likely
Strongly disagree	A lot less likely	Much more likely	A lot less likely	A lot less likely	A lot less likely	A lot less likely	A lot less likely	Much more likely	Much more likely	Much more likely	Much more likely

QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?

Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

When viewed this way, most factors appear to encourage WFH more than discouraging it

Impact of factors

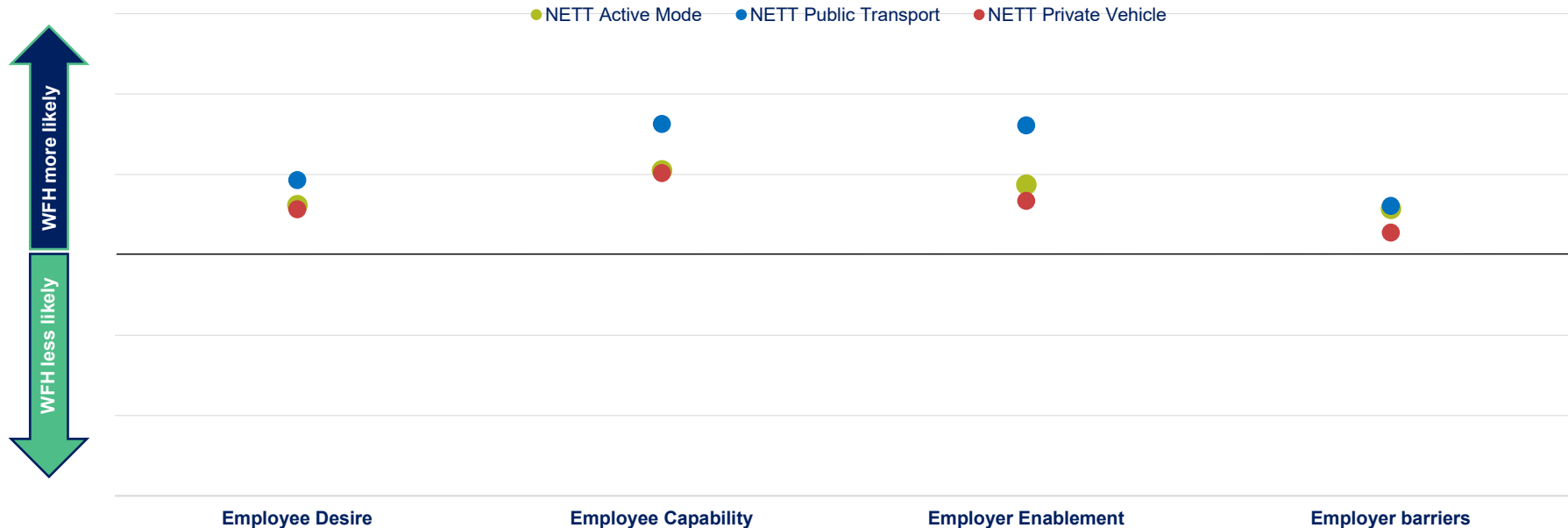


QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?

Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

Assuming that all factors have an equal impact, in aggregate they are currently more likely to encourage working from home among those capable of doing so

Impact of factors



QWORK6A- Thinking now about how people's work habits have changed over the past few years, to what extent do you agree or disagree with the following statements?

Base: all working adults 15+ in New Zealand who have worked from home, or who have the capability to work from home and who commuted by each mode in the past week or would have commuted by this mode before covid, but worked from home all week November 2022 & May 2023

I want to do it

Employee desire

- Desire factors have settled at a consistent level, around 3-in-5 want flexibility and 2-in-5 would rather not WFH if they can help it
- Desire is *slightly* stronger among PT commuters, but it is still common for all commuter types
- Active mode and private vehicle commuters are equally likely to reject, or at least *prefer not to* WFH and this instinct isn't very common among PT commuters

I can do it

Employee capability

- Capability is relatively strong among the commuting population: at least half of commuters think they have the means to do so and can make a good case to their employer.
- However, this is an area where there is serious divergence in commuter groups: PT commuters are much more likely to be able to do most work from home and have much stronger convictions about their capabilities that may make them more likely to persist with this practice

They will *help me* do it

Employer enablement

- Workplace *flexibility* is consistently recognised and common. However, there has been a steady decline in workers saying that their employer has changed to enable more working from home
- This may reflect official openness from employers, but less active encouragement than before
- In this area, PT commuters are significantly different, with much stronger confidence that the flexibility and workplace changes to enable working from home

They will *stop me* from doing it

Employer barriers

- Employer barriers haven't yet become very common, with limits on WFH days the most common factor
- The big difference between modes is that PT commuters are less likely to say that they don't know if barriers are there, or that they aren't applicable. They are among the most likely to have limits on WFH days.
- With the practice more common in their workplaces, employers may be more engaged and more likely to set formal policies

