Waka Kotahi COVID-19 transport impact

Fieldwork waves 1-22 core report

20 October 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:
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Report content

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

- 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.

*For waves 1 – 14 fieldwork and reporting was undertaken weekly, for waves 15 and 16 fieldwork and reporting was undertaken bi-weekly, whilst wave 17 fieldwork and reporting was undertaken 3 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.

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) Regular* 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: Harmoni 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, mask ownership, etc.

Report notes (i)

Key information to note for this report

- This report is based on twenty-two waves of fieldwork, see table ►

- The sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves, combined sum of waves 5 and 6, combined sum of waves 7, 8, 9 and 10, combined sum of waves 11, 12, 13, 14, 15, 16, the combined sum of wave 17 and 18, and the combined sum of waves 19 and 20, 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 this year*.

- At a total population level, significance testing indicated in this wave 22 report is based on a statistically significant shift of results between waves 1 to 22, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs combined level 2 alert results vs combined level 1 vs combined level 3/2 vs. combined level 2.5/2 vs level 2/1 vs level 1 to date.

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	Alert Level 3 (AKL) Alert level 2 (Rest of NZ)
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 24th September to Sunday 27 September	Alert level 2 (AKL) Alert level 1 (Rest of NZ)
22	Thursday 15th October to Sunday 18th October	Alert level 1

- 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 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		Waves 7 - 10		Waves 11 – 16		Waves 17 - 18		Wave 19 - 20		Wave 21		Wave 22	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MOE*	Sample	MOE*	Sample	MoE*	Sample	MOE*
Total		n=5,060	1.38	n=2,532	1.95	n=5,043	1.38	n=7,561	1.13	n= 2,455	1.98	n= 2,626	1.91	n= 1,253	2.77	n= 1,220	2.81
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=1,324	2.69	n=1,964	2.21	n=661	3.81	n=676	3.77	n=331	5.39	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=599	4.0	n=200	6.93	n=197	6.98	n=100	9.8	n=97	9.95
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0	n=200	6.93	n=217	6.65	n=100	9.8	n=101	9.75
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=1,129	2.92	n=311	5.56	n=357	5.19	n=175	7.41	n=156	7.85
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=601	4.0	n=200	6.93	n=200	6.93	n=100	9.8	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=607	3.98	n=200	6.93	n=208	6.79	n=87	10.51	n=93	10.16
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=1,328	2.69	n=2,061	2.16	n=683	3.75	n=771	3.53	n=360	5.16	n=342	5.3
Disability, Vulnerability and COVID-19**																	
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=866	3.33	n=284	5.82	n=323	5.45	n=132	8.53	n=130	8.6
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=1,640	2.42	n=584	4.06	n=617	3.95	n=317	5.5	n=299	5.67
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=627	3.91	n=830	3.4	n=266	6.01	n=293	5.73	n=162	7.7	n=131	8.56

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

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Context: New Zealand COVID-19 timeline

3 February
Travellers leaving from China denied entry to NZ unless they are NZ citizens or permanent residents

28 February
New Zealand confirms its first COVID-19 case
Travel restrictions introduced for those coming from Iran

14 March
Announcement that all travellers arriving in NZ must self-isolate for 14 days upon arrival

16 March
Public gatherings of more than 500 people banned

19 March
New Zealand bans all non-residents from entering the country
Indoor events of more than 100 people now banned

21 March
PM Jacinda Ardern announces a four level, country-wide alert system
New Zealand at alert level 2

23 March
NZ upgraded to level 3, public notified this would be raised to level 4 at 11:59pm, 25 March. Non-essential services required to close in 48 hours

24 March All public transport to be free during lockdown period

25 March
New Zealand upgraded to level 4, resulting in a nationwide lockdown

3 April Waka Kotahi COVID-19 impact tracker fieldwork begins

20 April
PM Jacinda Ardern announces NZ will move to level 3 at 11:59pm, 27 April, remaining there for at least two weeks

27 April
New Zealand moved to alert level 3 at 11:59pm

4 May
First day where no new COVID-19 cases are recorded in NZ

11 May
PM Jacinda Arden announces that New Zealand will move to level 2 at 11:59pm, 13 May, with schools to open Monday 18 May and bars Thursday 21 May.

13 May
New Zealand moved to alert level 2 at 11:59pm

18 May & 21 May
All schools open to students on Monday and bars allowed to open Thursday

8 June - **New Zealand moved to alert level 1 at 11:59pm**

16 June
Two new COVID-19 cases are confirmed after 24 days with no new cases, followed by more new cases during the week

25 June
12 active COVID-19 cases are confirmed in NZ, with a number of changes implemented to ensure improved border management

6 July – present
Victoria experiences a resurgence of COVID-19 cases and re-enters lockdown conditions. New cases also begin to appear again in NSW and restrictions begin to be re-imposed.
Like New Zealand, Victoria and NSW had previously reached a case load of zero and had seen lockdown restrictions lifted

15 July
PM Jacinda Ardern announces response framework going forward, which will involve localised lockdowns in the event of another community-wide outbreak of COVID-19

27 July
Tertiary institutions re-open for face-to-face lectures, with corresponding increase in traffic and mode used

11 August
New Zealand confirms four new community transmitted cases of COVID-19 in Auckland. PM Jacinda Ardern announces that Auckland will move to level 3 and the rest of New Zealand will move to level 2 at noon, 12 August

12 August **Auckland moved to alert level 3 at noon, rest of New Zealand moved to alert level 2**

12 August
New Zealand Police set up nine checkpoints at the borders of the Auckland region to monitor who is entering and exiting the city. Aucklanders asked to leave or enter for essential purposes only.

24 August
PM Jacinda Ardern announces that Auckland will remain at level 3 until 11.59pm on 30 August, with the rest of the nation remaining at level 2. Masks will become compulsory on public transport.

30 August **Auckland moved to alert level 2.5 at midnight, rest of New Zealand remains at alert level 2**

4 September
PM Jacinda Arden announces alert levels to remain in place for at least 10 more days.

14 September
PM Jacinda Arden announces alert levels to extend one more week and social distancing rules on transport to be relaxed, with mask wearing remaining compulsory

21 September
PM Jacinda Arden announces Auckland will move to level 2 on 23rd & **the rest of New Zealand will move to level 1 at 11:59pm**, with mask wearing no longer compulsory on public transport outside of Auckland

23 September **Auckland moved to alert level 2 at 11.59pm**

25 September Significant disruption to the Auckland transport network due to damage to the Auckland Harbour Bridge, coupled with disruption issues to the train network.

7 October **Auckland moved to alert level 1 at midday to match rest of New Zealand**

Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1-22

Waka Kotahi COVID-19 transport impact tracker

- Wave 22 of fieldwork is the first wave to see all areas of New Zealand under the same alert level since community transmissions were recorded in Auckland and triggered a split level lockdown

- Infection and transmission concerns have declined to rates last seen during level 1, driven by lessening concerns in regions outside of Auckland. Conversely, economic concerns have also declined significantly, but driven almost solely by the Auckland region, while remaining stable elsewhere.

  - Self-isolating behaviours are still declining and are now at rates comparable to the original level 1 and while Auckland continues to have higher rates of self isolation, this behaviour is declining at roughly the same rate as it is in the rest of NZ.

  - Commitment to mask wearing on public transport has declined significantly in Auckland now that it is no longer compulsory.

- Daily essential journeys are now occurring at similar rates to the original level 1, but these are relatively unchanged from late September since the recovery had been consistent through the lockdown period and journeys had already returned to level 1 rates.

  - This is true of less frequent essential journeys, non-essential journeys and inter-regional travel too. However, while all of these are matching the original level 1, they are some way short of the stated pre-lockdown rates of travel.

- After falling away significantly during the latest lockdown period, intention to travel more or less for tourism in the coming six months has recovered significantly to lessen the NET negative growth in tourism journeys that we have measured throughout this process.

  - Compared to July, the intended destinations and activities of NZ domestic tourists are mostly unchanged going into the summer, save for a marginal increase in the appeal of North Island beaches.

- While physical stores were largely unaffected by the second lockdown, usage of online specialist stores fell away significantly as level 2 lockdown ended in Auckland.

  - While around one in five consumers indicated that they had changed their car purchasing behaviour as a result of COVID-19, comparisons between pre-lockdown intent and purchases during lockdown don't indicate that decreases are significantly greater than they would otherwise have been due to other purchase delaying factors

- Stated weekly public transport usage grew for the first time in more than a month, driven primarily by an increase in bus usage across the country. At the same time, stated weekly private vehicle usage dropped by a statistically significant extent for the first time under lockdown conditions.

  - With Auckland returning to level 1 conditions and greater freedom of movement and assembly within the city, stated weekly taxi usage doubled, driving statistically significant growth in taxi usage at the national level.

- At a national level, the proportion working from home for most of the week has directionally declined to match rates seen during the original level 1 period.

  - The proportion of public transport commuters working from home is at the lowest level recorded during this research

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Section 3 – Context

Key findings – context

Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- Understanding attitudes around COVID-19 provides the context in which journey and mode changes can be viewed. General fears and attitudes may work as external factors influencing the choices that New Zealanders make.

- The latest wave of fieldwork took place in the first full week for some time in which all of New Zealand has been under level 1 conditions.

- In terms of concerns related to the virus, two dynamics appear to be in play:
  - concerns about personal risk through infection and transmission have significantly decreased driven by rapidly dropping concerns in regions outside of Auckland which did not experience the higher levels of the second lockdown.
  - at the same time, concerns about the economic impact of the virus have dropped significantly in Auckland as the region transitions to level 1, but have remained stable elsewhere.

- Self isolating behaviours continue to decline and are now at rates last seen during the original level 1 period. Auckland still has higher rates of stated isolation, closer in profile to where the rest of New Zealand was at the start of the second lockdown, but is continuing to track downwards at roughly the same pace as the rest of the country.

- Commitment to mask wearing on public transport dropped off in Auckland once it was no longer compulsory, following the same pattern as was seen in the rest of New Zealand in transition from the second level 2 lockdown to level 1.
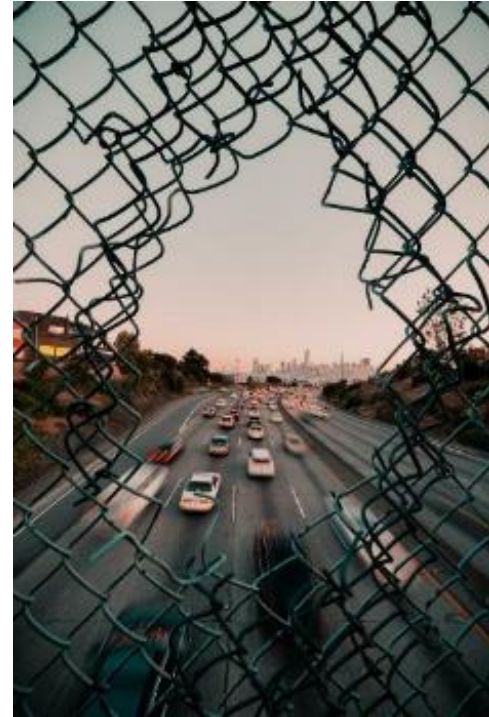
Concern about infection and transmission have dropped significantly for the first time since new community transmission cases were reported

COVID-19 concerns (NETT all concerned)

QPTUSE3. How personally concerned are you about each of the following?
*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1*

▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

In Auckland, these concerns still remain at a higher level and have only declined directionally following the change in alert level

COVID-19 concerns (NETT all concerned) – Auckland

Legend:
- The risk of COVID-19 infection to yourself
- The risk of transmitting COVID-19 to others

Public/school holidays

Discussions about level 3 begin

New cases reported

New cases reported

The risk of COVID-19 infection to yourself (olive/green line):
70%, 64%, 64%, 52%, 58%, 57%, 54%, 51%, 45%, 48%, 46%, 52%, 50%, 45%, 53%, 53%, 61%, 58%, 58%, 56%, 56%, 54%

The risk of transmitting COVID-19 to others (blue line):
69%, 67%, 65%, 55%, 63%, 57%, 61%, 52%, 51%, 49%, 49%, 53%, 54%, 47%, 57%, 58%, 62%, 58%, 59%, 62%, 58%, 55%

Time periods (x-axis):
| 3Apr - 8Apr (n=1264) | 9Apr - 14Apr (n=1263) | 16Apr - 20Apr (n=1232) | 23Apr - 26Apr (n=1301) | 30Apr - 3May (n=1267) | 7May - 10May (n=1265) | 14May - 17May (n=1263) | 21May - 24May (n=1264) | 28May - 1Jun (n=1255) | 4Jun - 7Jun (n=1261) | 11Jun - 14Jun (n=1268) | 18Jun - 21Jun (n=1263) | 25Jun - 28Jun (n=1263) | 2Jul - 5Jul (n=1230) | 16Jul - 19Jul (n=1273) | 30Jul - 2Aug (n=1264) | 20Aug - 23Aug (n=1254) | 27Aug - 30Aug (n=1201) | 3Sep - 6Sep (n=1219) | 17Sep - 20Sep (n=1407) | 24Sep - 27Sep (n=1253) | 15Oct - 18Oct (n=1220) |

Alert levels:
Level 4 | Level 3 | Level 2 | Level 1* | Level 3/2 | Level 2.5/2 | Level 2/1 | Level 1

QPTUSE3. How personally concerned are you about each of the following?
*Base: all adults 15+ in Auckland *fieldwork frequency decreased from weekly during level 1*

▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

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Outside of Auckland, transmission concerns dropped to the lowest level recorded, with concern about personal infection only lower during the initial level 1 period

COVID-19 concerns (NETT all concerned) – rest of New Zealand

QPTUSE3. How personally concerned are you about each of the following?
*Base: all adults 15+ outside of Auckland *fieldwork frequency decreased from weekly during level 1*

▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

Nationally, there have been statistically significant declines in concern about economic impacts, all of which now sit at the lowest levels recorded in this research

Economic concerns (NETT all concerned)

Your personal financial situation

The economy of New Zealand in general

The risk of losing employment of myself or others in household

Public/school holidays

Discussions about level 3 begin

New cases reported

QPTUSE3. How personally concerned are you about each of the following?
*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1*
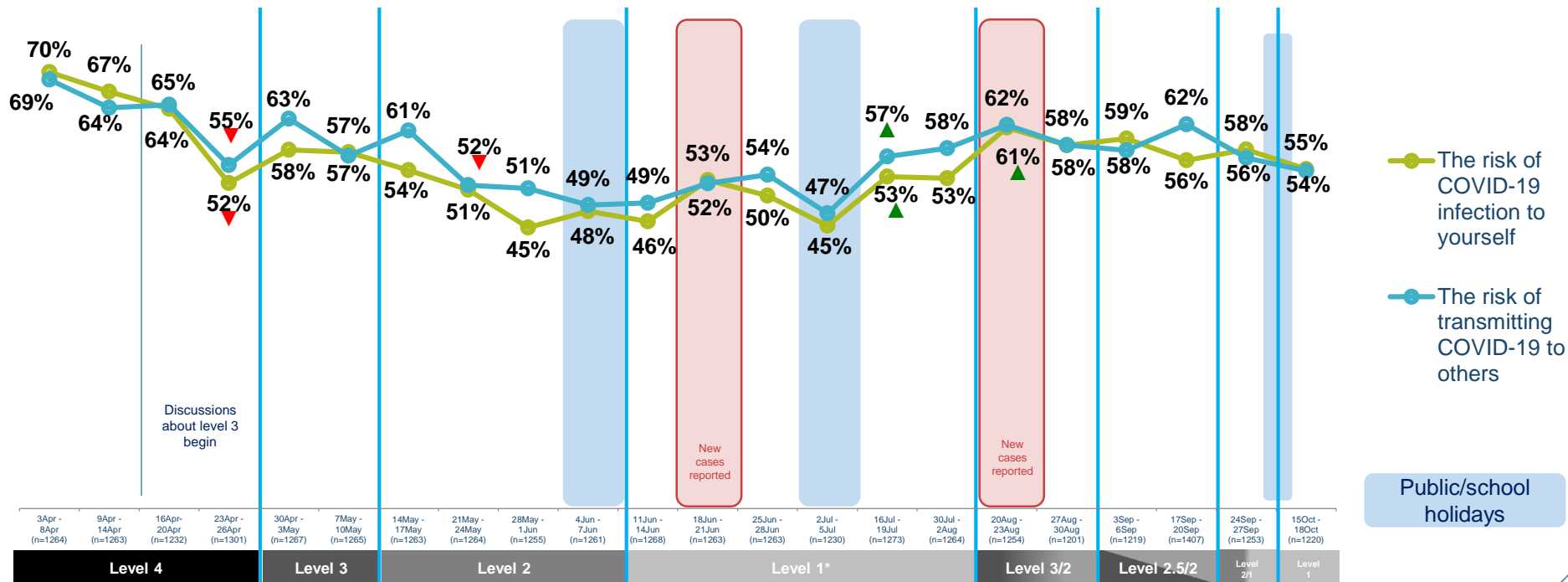
△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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Auckland is the clear driver of this change, with the three concerns seeing close to a ten point decline in the region

Economic concerns (NETT all concerned) – Auckland

QPTUSE3. How personally concerned are you about each of the following?
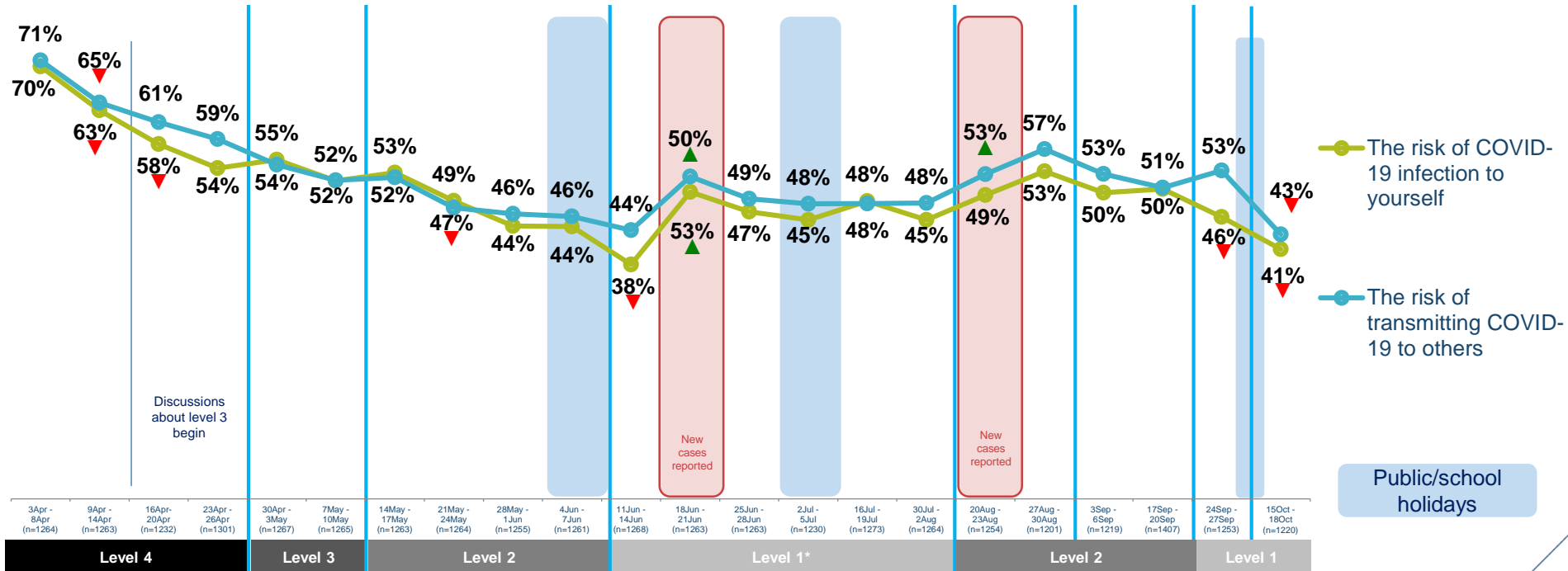*Base: all adults 15+ in Auckland *fieldwork frequency decreased from weekly during level 1*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Comparatively, concerns about the economy experienced no statistically significant decline outside of Auckland

Economic concerns (NETT all concerned) – rest of New Zealand

Your personal financial situation (blue line):
58%, 51%, 45%, 46%, 45%, 48%, 48%, 44%, 45%, 48%, 47%, 49%, 49%, 46%, 47%, 49%, 48%, 49%, 50%, 50%, 48%, 48%

The economy of New Zealand in general (green line):
85%, 83%, 80%, 82%, 82%, 83%, 78%, 76%, 78%, 77%, 76%, 80%, 79%, 76%, 74%, 77%, 76%, 77%, 77%, 76%, 76%, 74%

The risk of losing employment of myself or others in household (brown line):
51%, 48%, 50%, 48%, 47%, 48%, 49%, 39%, 43%, 44%, 42%, 46%, 45%, 43%, 43%, 48%, 46%, 41%, 47%, 42%, 44%, 41%

Discussions about level 3 begin

New cases reported

New cases reported

Public/school holidays

| 3Apr - 8Apr (n=1264) | 9Apr - 14Apr (n=1263) | 16Apr - 20Apr (n=1232) | 23Apr - 26Apr (n=1301) | 30Apr - 3May (n=1267) | 7May - 10May (n=1265) | 14May - 17May (n=1263) | 21May - 24May (n=1264) | 28May - 1Jun (n=1255) | 4Jun - 7Jun (n=1261) | 11Jun - 14Jun (n=1268) | 18Jun - 21Jun (n=1263) | 25Jun - 28Jun (n=1263) | 2Jul - 5Jul (n=1230) | 16Jul - 19Jul (n=1273) | 30Jul - 2Aug (n=1264) | 20Aug - 23Aug (n=1254) | 27Aug - 30Aug (n=1201) | 3Sep - 6Sep (n=1219) | 17Sep - 20Sep (n=1407) | 24Sep - 27Sep (n=1253) | 15Oct - 18Oct (n=1220) |

| Level 4 | Level 3 | Level 2 | Level 1* | Level 3/2 | Level 2.5/2 | Level 2/1 | Level 1 |

QPTUSE3. How personally concerned are you about each of the following?
*Base: all adults 15+ outside of Auckland *fieldwork frequency decreased from weekly during level 1*
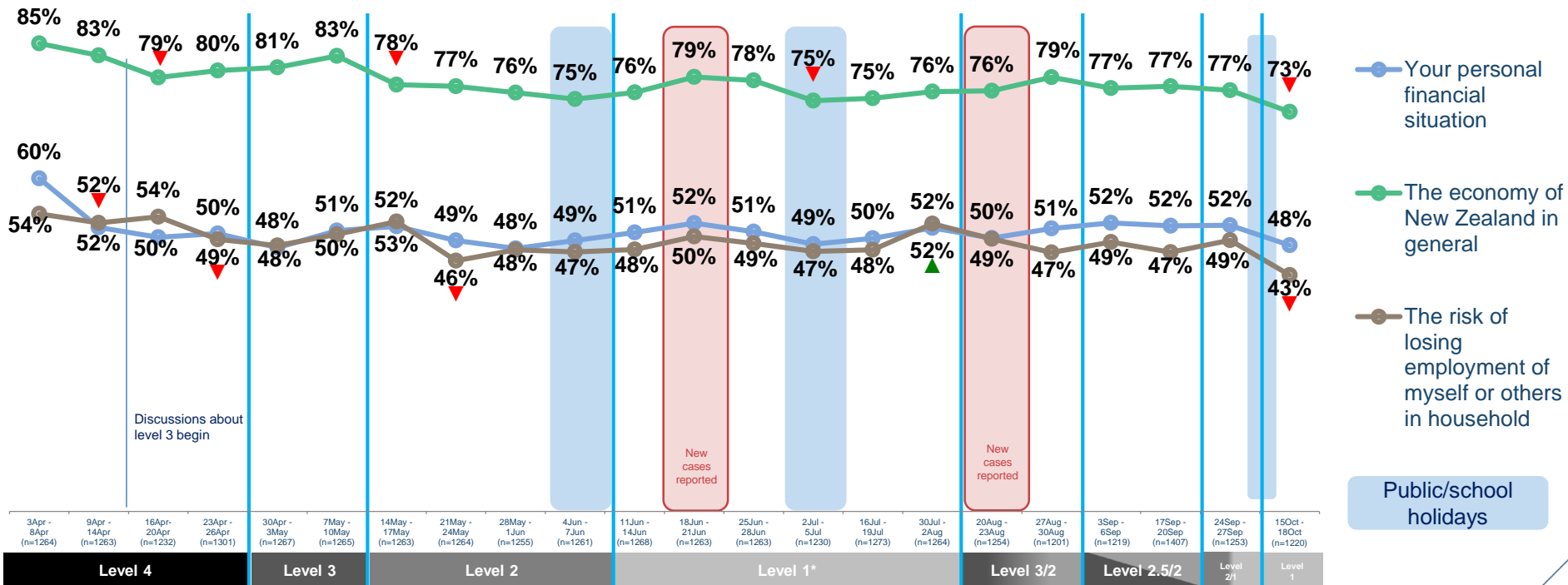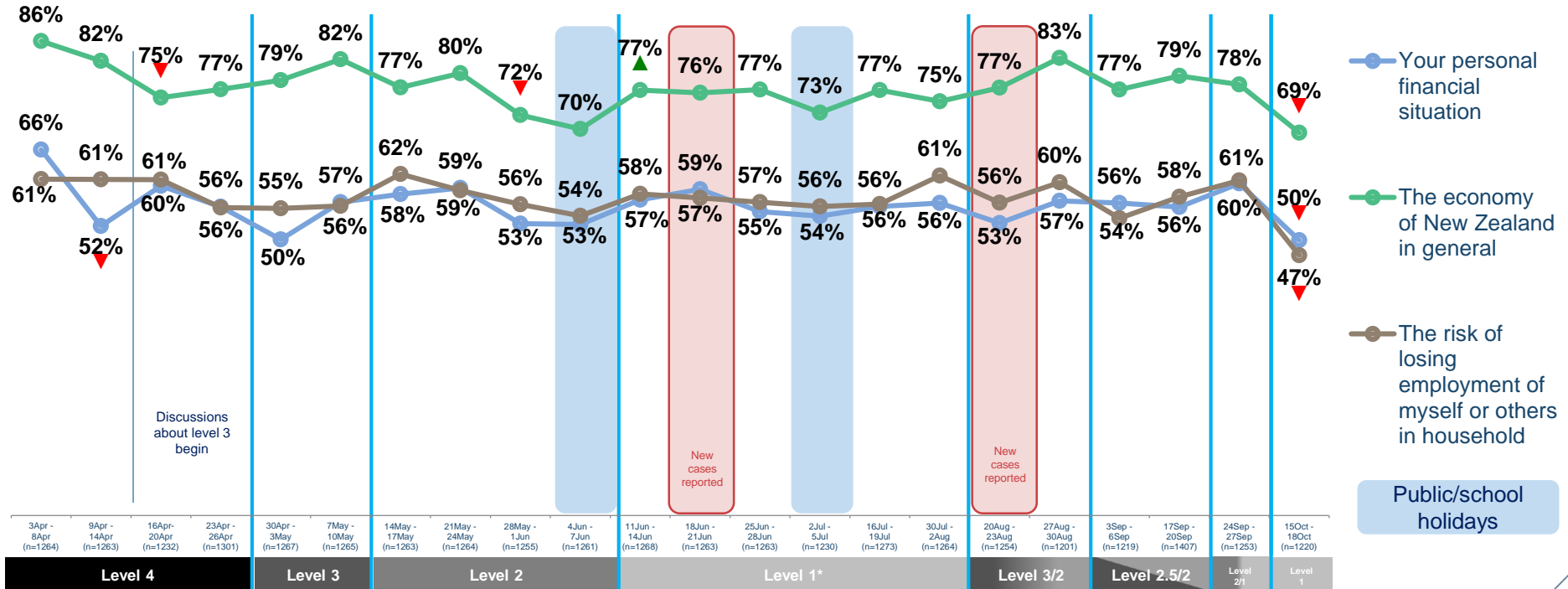
△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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Nationally, New Zealanders appear to be moving around much as they did during the initial level 1 conditions

Reported activity and movement during the past seven days by wave, excludes exercise
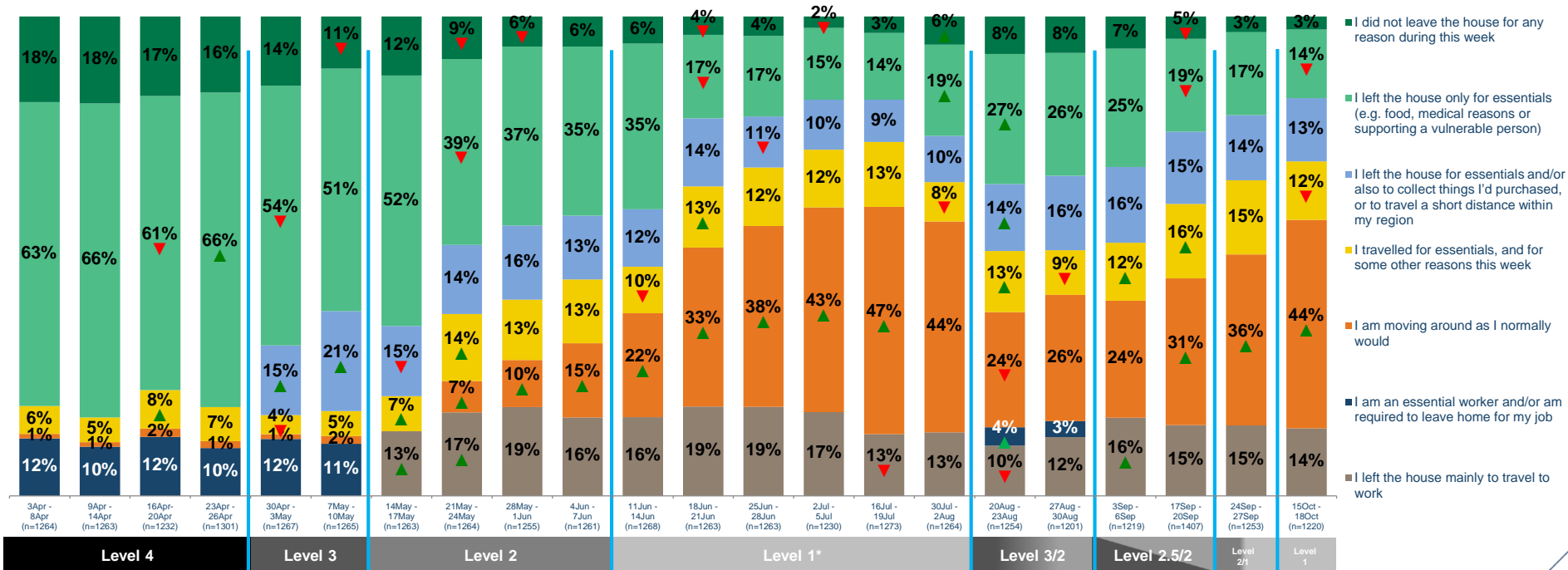
ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
*Base:all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Rates of isolation in Auckland continue to decrease and the profile is now remarkably similar to where the rest of the country was at the start of the second lockdown

Reported activity and movement during the past seven days by wave, excludes exercise
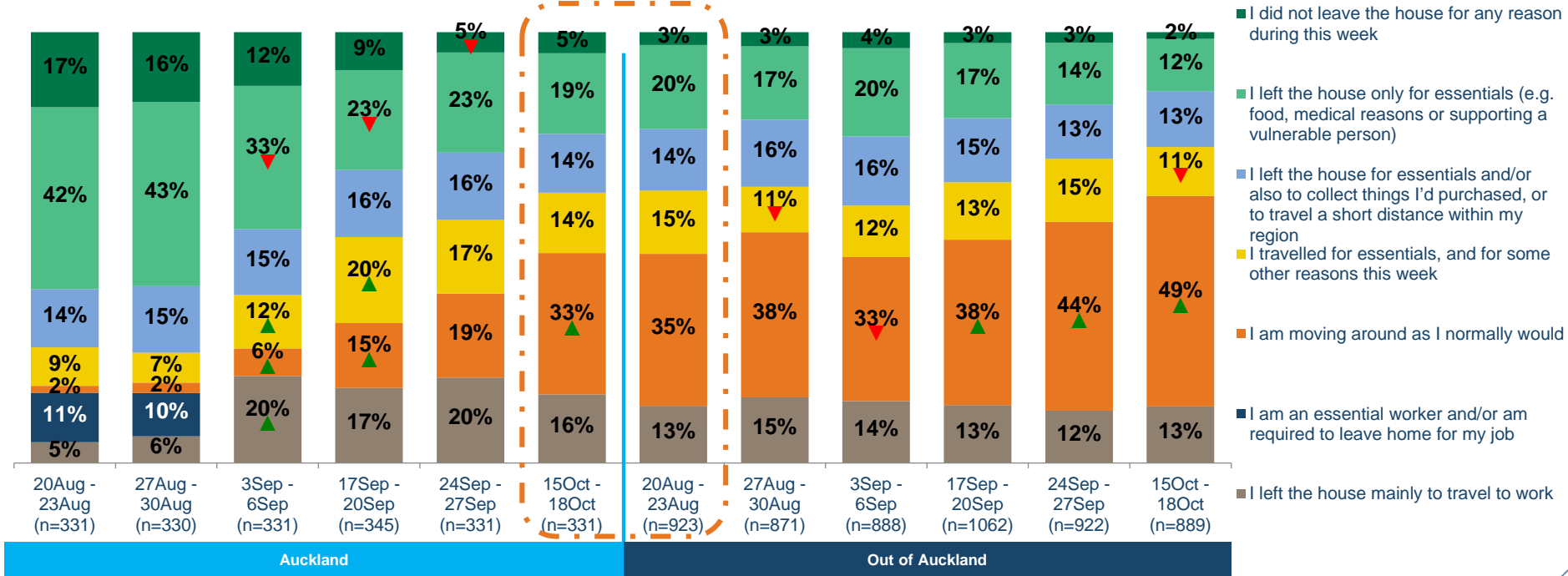
ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
*Base:all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1*

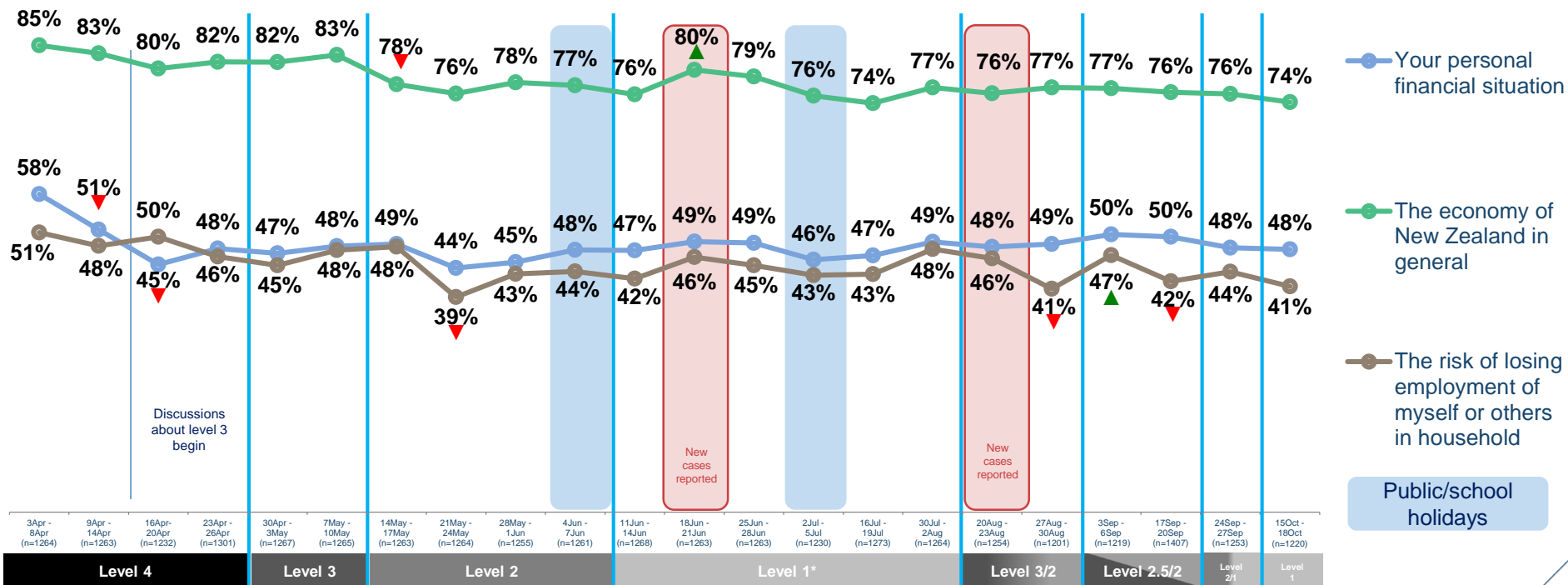△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Self isolation is declining at a steady rate both in Auckland and New Zealand in general, with Auckland tracking a little above the rest of the country

Self isolation over time
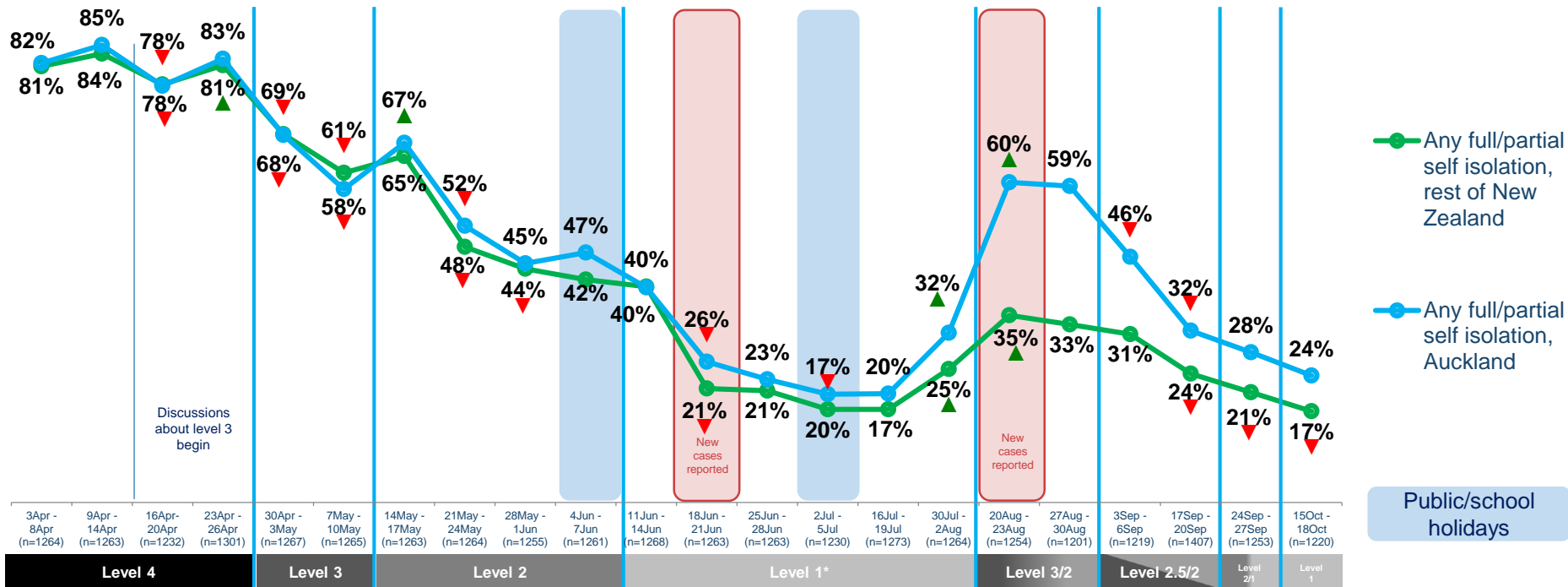
Any full/partial self isolation, rest of New Zealand

Any full/partial self isolation, Auckland

Public/school holidays

ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
*Base:all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1*

▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

Although not statistically significant, stated mask adherence on public transport has dropped in Auckland to levels comparable to early level 1 elsewhere in New Zealand

When travelling on public transport (eg bus, train or ferry)
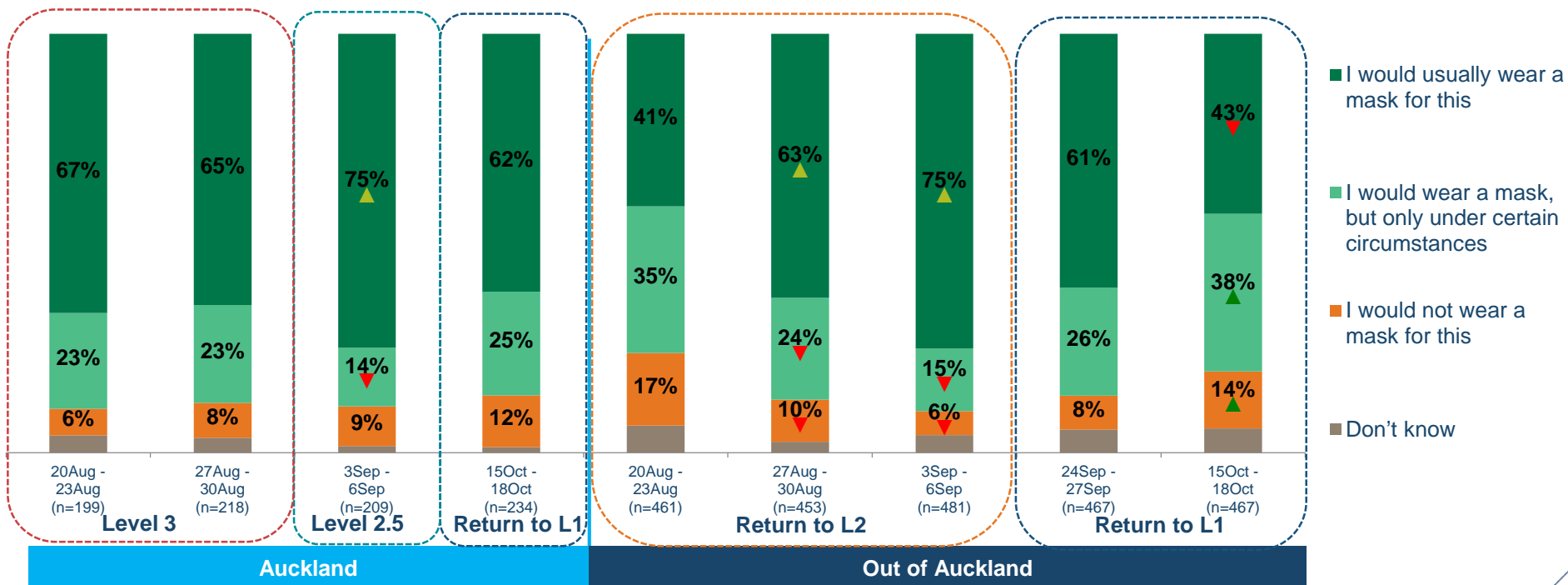
Legend:
- ■ I would usually wear a mask for this
- ■ I would wear a mask, but only under certain circumstances
- ■ I would not wear a mask for this
- ■ Don't know

Auckland

Level 3:
- 20Aug - 23Aug (n=199): 67%, 23%, 6%
- 27Aug - 30Aug (n=218): 65%, 23%, 8%

Level 2.5:
- 3Sep - 6Sep (n=209): 75%, 14%, 9%

Return to L1:
- 15Oct - 18Oct (n=234): 62%, 25%, 12%

Out of Auckland

Return to L2:
- 20Aug - 23Aug (n=461): 41%, 35%, 17%
- 27Aug - 30Aug (n=453): 63%, 24%, 10%
- 3Sep - 6Sep (n=481): 75%, 15%, 6%

Return to L1:
- 24Sep - 27Sep (n=467): 61%, 26%, 8%
- 15Oct - 18Oct (n=467): 43%, 38%, 14%

QMASK2A. Under the current alert level in your area, when doing the following activities which statement applies to you… When travelling on public transport (eg bus, train or ferry)
Base: all adults 15+ in New Zealand who would normally do this activity
NOTE: question suspended during times that masks were compulsory on public transport

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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Even when grocery shopping, which had appeared to have resilient adherence, Auckland mask wearing has dropped off

When shopping for groceries (eg in a supermarket)

Auckland

	20Aug - 23Aug (n=312)	27Aug - 30Aug (n=311)	3Sep - 6Sep (n=316)	17Sep - 20Sep (n=339)	24Sep - 27Sep (n=325)	15Oct - 18Oct (n=319)
I would usually wear a mask for this	74%	71%	75%	70%	73%	44% ▼
I would wear a mask, but only under certain circumstances	16%	19%	14%	19%	18%	32% ▲
I would not wear a mask for this	8%	9%	10%	10%	9%	22% ▲

Out of Auckland

	20Aug - 23Aug (n=876)	27Aug - 30Aug (n=843)	3Sep - 6Sep (n=862)	17Sep - 20Sep (n=1021)	24Sep - 27Sep (n=883)	15Oct - 18Oct (n=850)
I would usually wear a mask for this	24%	26%	25%	21%	14% ▼	15%
I would wear a mask, but only under certain circumstances	37%	35%	33%	33%	29% ▼	33% ▲
I would not wear a mask for this	36%	38%	39%	44%	54% ▲	48% ▼

Legend:
- I would usually wear a mask for this
- I would wear a mask, but only under certain circumstances
- I would not wear a mask for this
- Don't know

QMASK2A. Under the current alert level in your area, when doing the following activities which statement applies to you… When shopping for groceries (eg in a supermarket)
Base: all adults 15+ in New Zealand who would normally do this activity
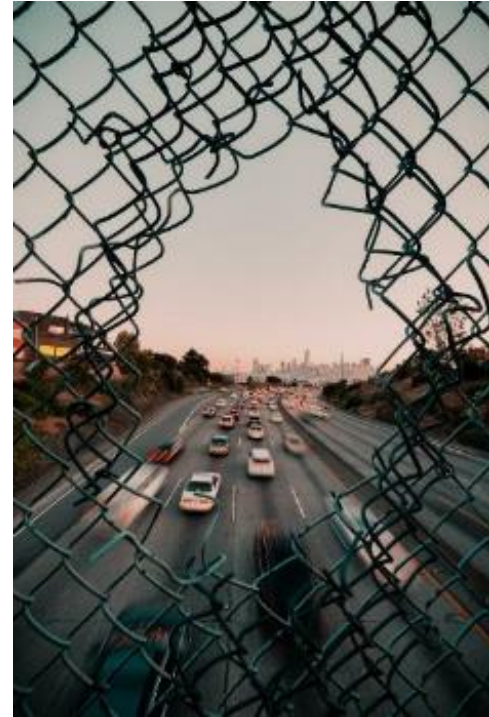
Section 4 – Local and domestic journeys

Key findings – local and domestic journeys

Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels, we have been tracking changes in journeys made at a local and national level as and when they have been permitted under lockdown conditions.

- Most daily essential journeys are now happening at roughly the rate they did during the initial level 1 period. However, work journeys are still 10 points behind and journeys for further/higher education four points behind stated pre-lockdown rates. Only trips to take children to and from school are occurring at a rate comparable to stated pre-COVID levels.

- This is also the case for less-frequent essential journeys and for non-essential journeys, which are matching to original level 1 rates, but remaining some way short of the stated pre-lockdown behaviours.

- Prominent inter-regional journeys remain relatively high, having recovered steadily since the second lockdown was announced. Trips to visit family and friends recovered quickest and are now comparable to previous level 1 conditions.

Nationally, daily essential journeys have returned to rates seeing during the first level 1 period, however only taking children to school has matched pre-lockdown levels

Daily essential journeys
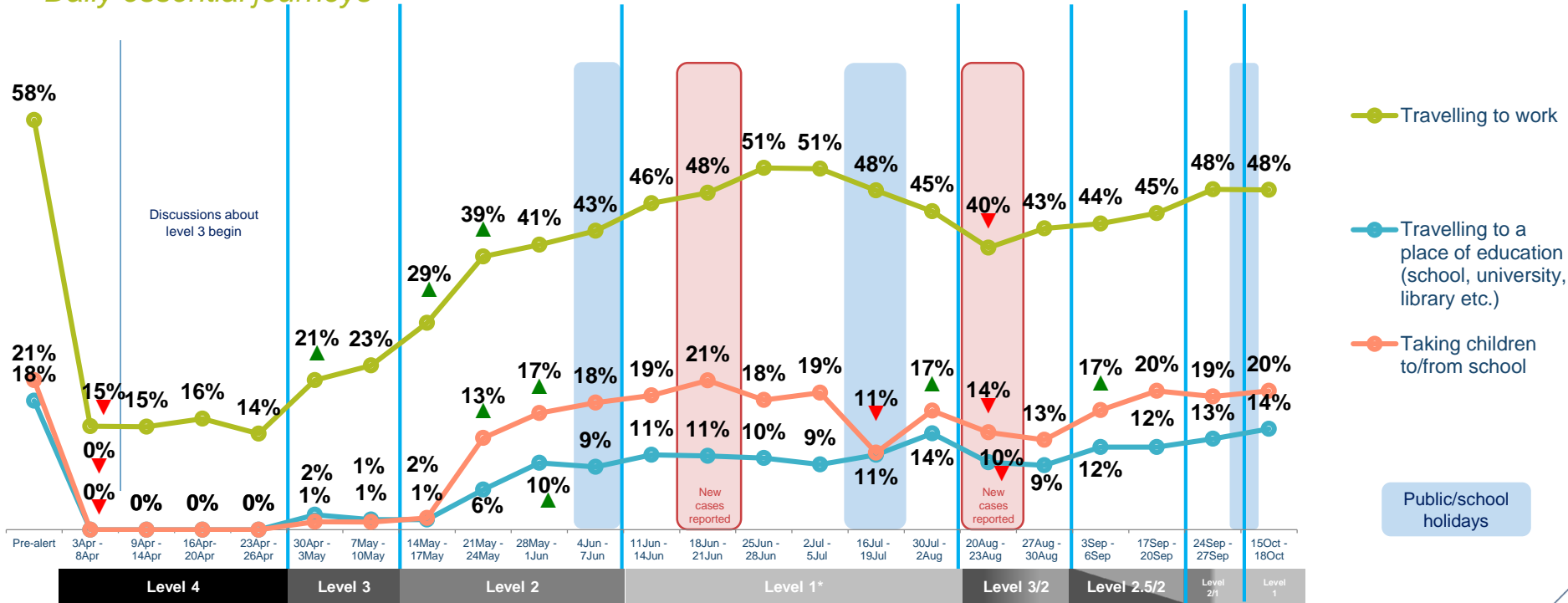
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: *all adults 15+*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Those less frequent essential journeys have also returned to level 1 rates, but don't appear on track to matching pre-outbreak activity

Other journeys

Going to a medical appointment (blue line): 44%, 12%, 14%, 14%, 12%, 14%, 14%, 15%, 19%, 18%, 20%, 23%, 25%, 25%, 24%, 28%, 28%, 22%, 21%, 23%, 26%, 27%, 28%

Shopping for groceries (green line): 90%, 69%, 69%, 69%, 69%, 70%, 72%, 73%, 77%, 79%, 80%, 81%, 80%, 79%, 82%, 82%, 80%, 78%, 78%, 78%, 81%, 84%, 83%

Travel to support vulnerable friend or family (yellow line): 22%, 11%, 9%, 10%, 10%, 12%, 12%, 11%, 9%, 12%, 14%, 13%, 12%, 12%, 14%, 14%, 15%, 11%, 11%, 11%, 14%, 14%, 13%

Discussions about level 3 begin

New cases reported

New cases reported

Public/school holidays

Time periods: Pre-alert, 3Apr-8Apr, 9Apr-14Apr, 16Apr-20Apr, 23Apr-26Apr, 30Apr-3May, 7May-10May, 14May-17May, 21May-24May, 28May-1Jun, 4Jun-7Jun, 11Jun-14Jun, 18Jun-21Jun, 25Jun-28Jun, 2Jul-5Jul, 16Jul-19Jul, 30Jul-2Aug, 20Aug-23Aug, 27Aug-30Aug, 3Sep-6Sep, 17Sep-20Sep, 24Sep-27Sep, 15Oct-18Oct

Levels: Level 4, Level 3, Level 2, Level 1*, Level 3/2, Level 2.5/2, Level 2/1, Level 1

QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: *all adults 15+*

Non-essential journeys have also continued a steady recovery in every wave since new community transmissions were reported

Non-essential journeys
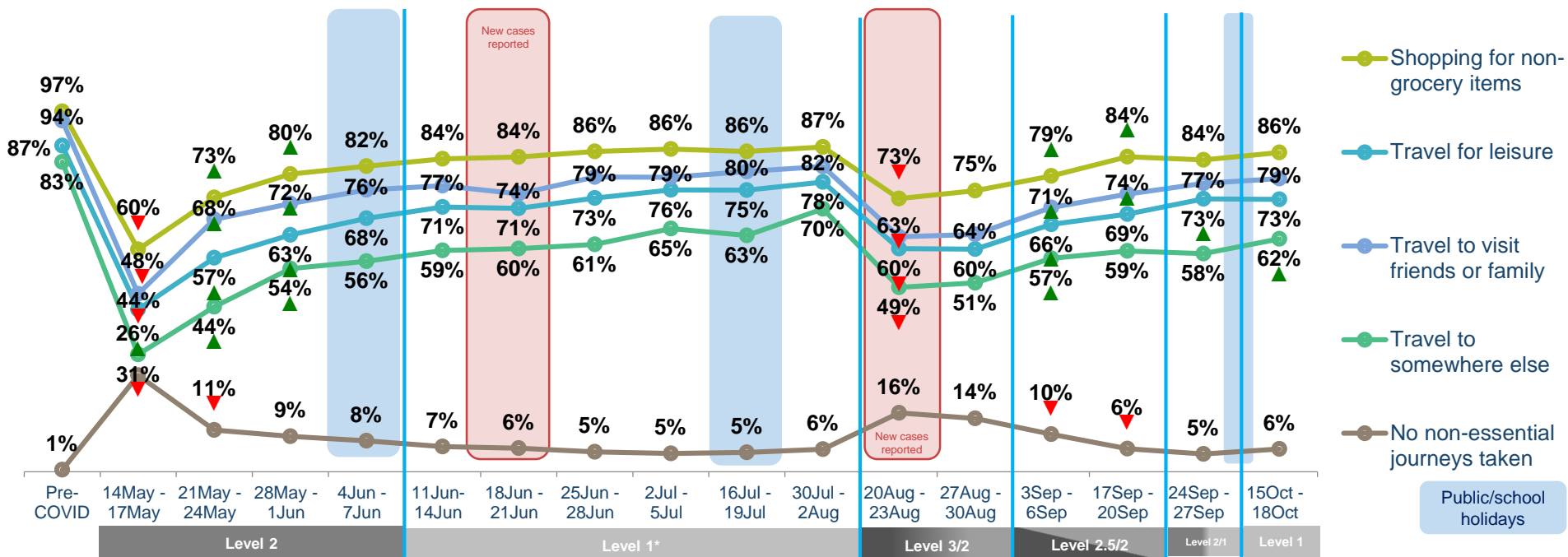
QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
Base: all adults 15+ interviewed during level 2, level 1, level 3/2, level 2.5/2, level 2/1 and level 1

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Visits to friends and relatives decreased directionally following an end of September peak, while holiday trips remained relatively stable into October

Domestic journeys

Holiday / vacation (green line):
27%, 35%, 37%, 37%, 30%, 33%, 35%, 37%, 32%, 23%, 25%, 27%, 30%, 36%, 32%

Visiting friends / relatives (olive line):
5%, 6%, 9%, 7%, 6%, 8%, 9%, 10%, 8%, 5%, 5%, 7%, 7%, 7%, 8%

New cases reported

21May - 24May	28May - 1Jun	4Jun - 7Jun	11Jun - 14Jun	18Jun - 21Jun	25Jun - 28Jun	2Jul - 5Jul	16Jul - 19Jul	30Jul - 2Aug	20Aug - 23Aug	27Aug - 30Aug	3Sep - 6Sep	17Sep - 20Sep	24Sep - 27Sep	15Oct - 18Oct

Level 2 | Level 1* | Level 3/2 | Level 2.5/2 | Level 2/1 | Level 1

Public/school holidays

QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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Section 5 – Domestic tourism

Key findings – going forward with domestic tourism

Waka Kotahi objective – how will domestic tourism change going forward?

- As New Zealand returns from a second period of lockdown conditions, it is important to understand how domestic tourism in this context will impact the transportation network and what draws who to where.

- After falling away significantly during the latest lockdown period, intention to travel more or less for the coming six months has recovered significantly to lessen the NET negative growth in tourism journeys that we have measured throughout this process.

- However, the evidence remains that domestic tourism trips will be down in volume from previous years, leaving markets to compete over a reduced pool of domestic visitors.

- Less physically taxing activities such as city attractions, beaches and short walks appear poised to receive more of this tourist traffic than longer physical excursions.

- Outside of these, the areas of particular DOC interest have not seen any significant change in intended visitors between the last time this data was collected during the winter and this week, as we approach the summer.

- In fact, the only thing that appears to be impacting tourism destination is warmer weather, with beaches directionally appearing to have greater appeal, which may draw a greater volume of visitors to the North Island.

Long term plans for holidays and family visits peaked at the end of September, perhaps in anticipation of the coming school holiday period

Proportion saying that they are likely to make domestic journeys in the next six months
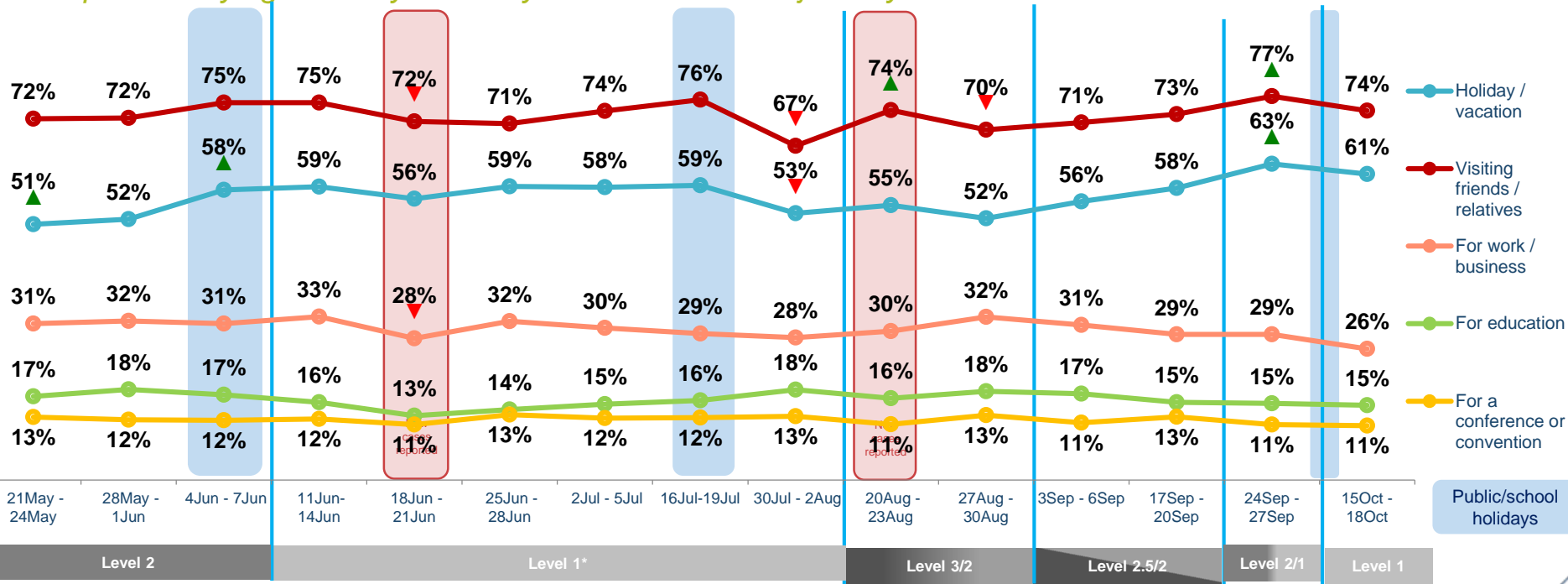
FDT1. How likely are you to make following types of domestic journeys in the next six months?
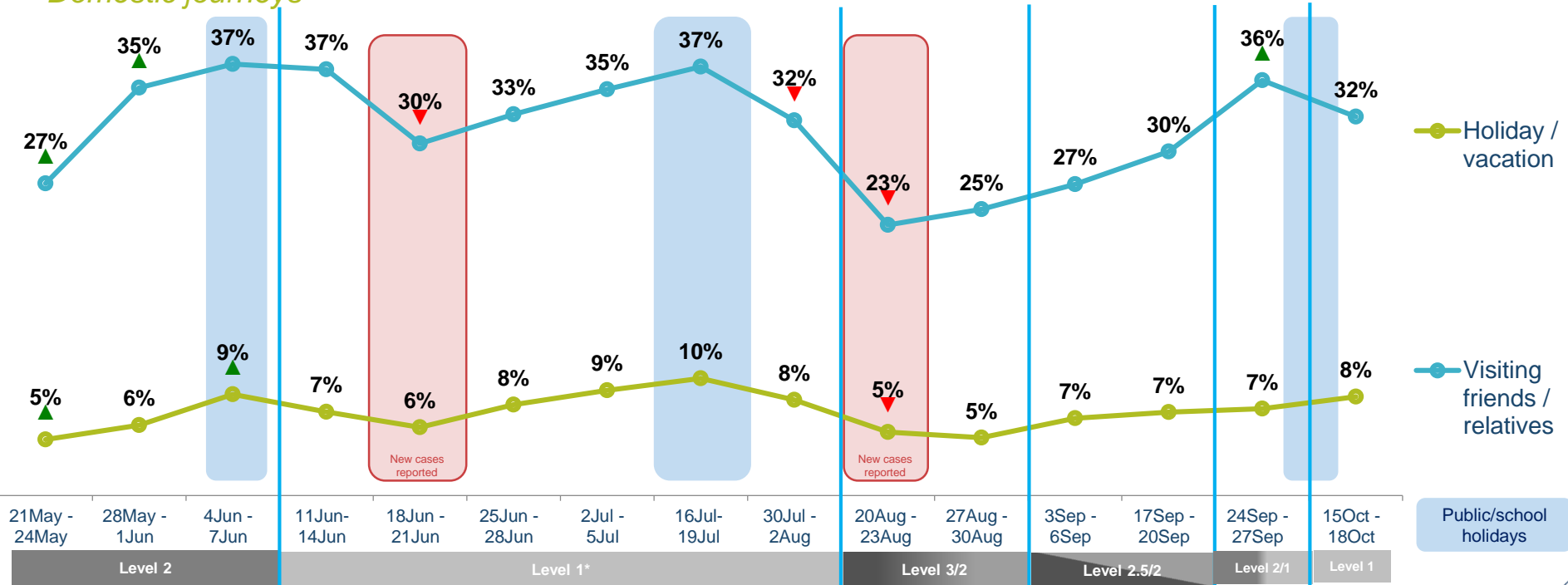*Base: all adults 15+ in New Zealand*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

NET projected growth in domestic travel has trended positively and projected decreases are less pronounced, particularly for holidays and visits to friends

Intention to travel domestically
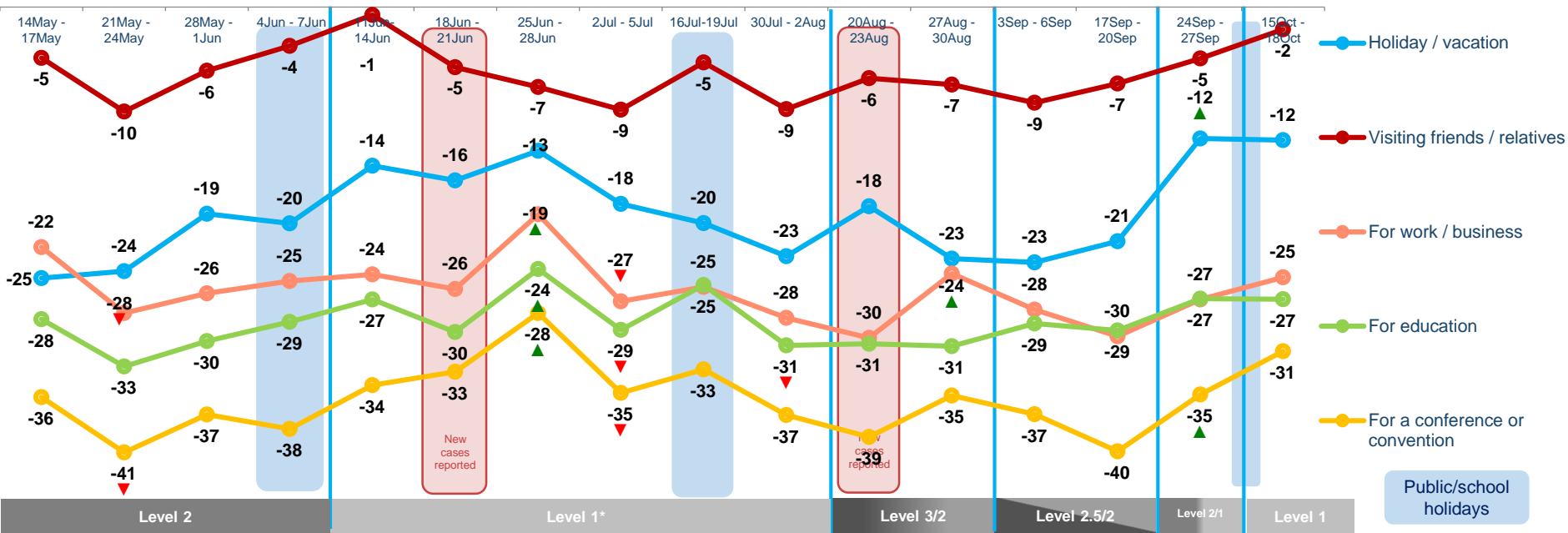
FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for…
Base: all adults 15+ in New Zealand

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

At present, beach and water activities seem to hold the greatest appeal going into the summer

Leisure and tourism activities
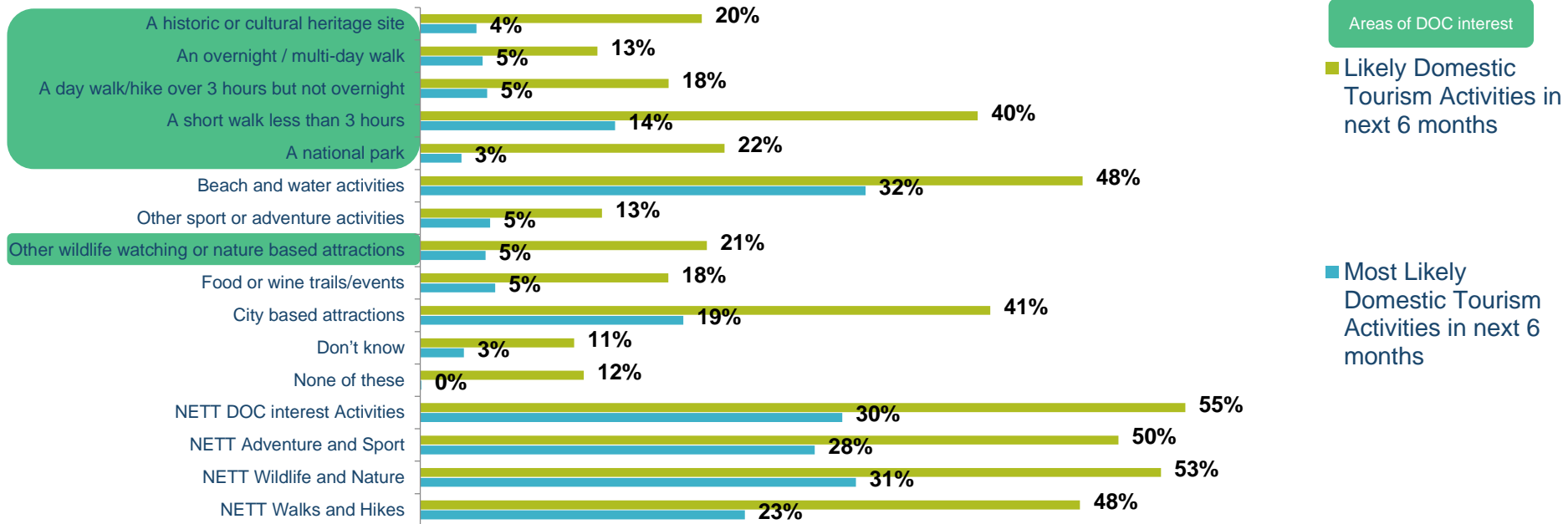
Areas of DOC interest

■ Likely Domestic Tourism Activities in next 6 months

■ Most Likely Domestic Tourism Activities in next 6 months

Activity	Likely (%)	Most Likely (%)
A historic or cultural heritage site	20%	4%
An overnight / multi-day walk	13%	5%
A day walk/hike over 3 hours but not overnight	18%	5%
A short walk less than 3 hours	40%	14%
A national park	22%	3%
Beach and water activities	48%	32%
Other sport or adventure activities	13%	5%
Other wildlife watching or nature based attractions	21%	5%
Food or wine trails/events	18%	5%
City based attractions	41%	19%
Don't know	11%	3%
None of these	12%	0%
NETT DOC interest Activities	55%	30%
NETT Adventure and Sport	50%	28%
NETT Wildlife and Nature	53%	31%
NETT Walks and Hikes	48%	23%

DOC1A. / DOC1B And which if any of the following, would you be likely to visit or take part in outside of the region you live in during the next six months? And thinking about the destinations and activities that you would consider, which one of these are you most likely, in the next six months, to visit or take part in?
Base: all adults 15+ in New Zealand likely to travel for a holiday or family visit in the next six months (n=1002); likely to do any of the listed activities (n=784)

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There has been little change in desire to do any of the activities, but there has been an 8 point directional shift in interest in beaches as we approach the summer

Leisure and tourism activities
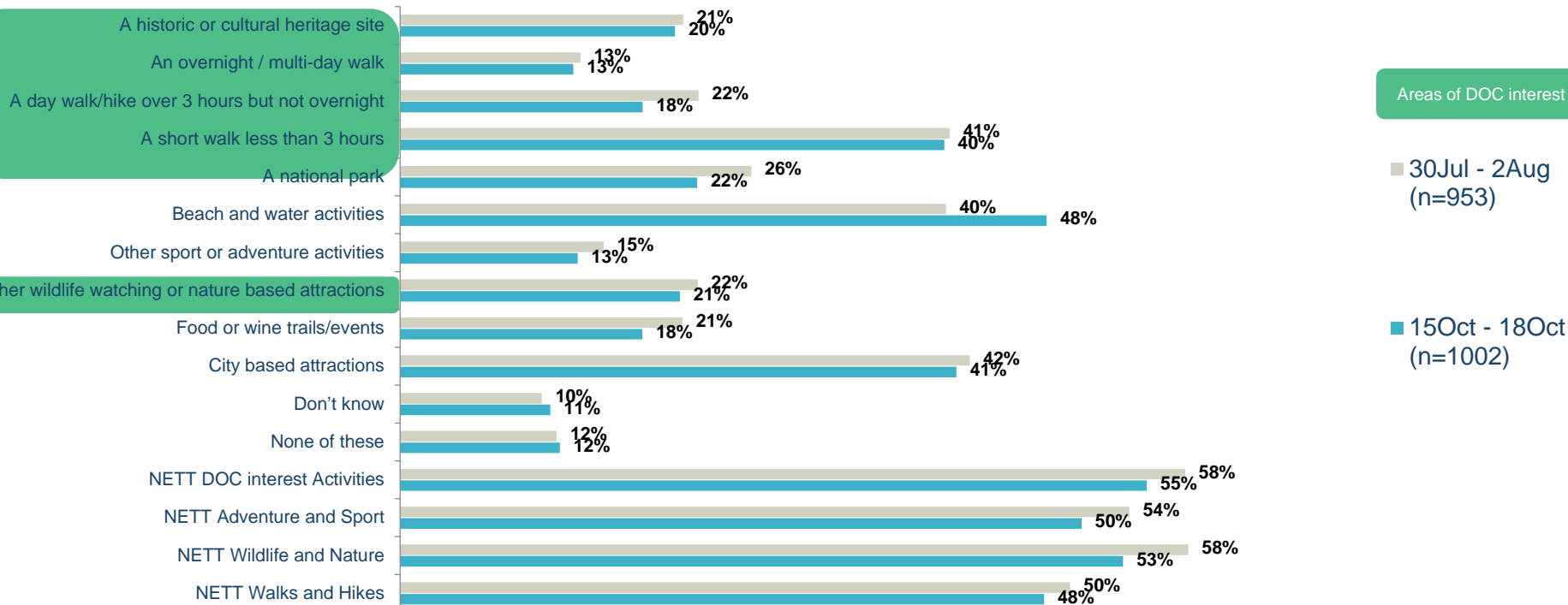
Areas of DOC interest

Activity	30Jul - 2Aug (n=953)	15Oct - 18Oct (n=1002)
A historic or cultural heritage site	21%	20%
An overnight / multi-day walk	13%	13%
A day walk/hike over 3 hours but not overnight	22%	18%
A short walk less than 3 hours	41%	40%
A national park	26%	22%
Beach and water activities	40%	48%
Other sport or adventure activities	15%	13%
Other wildlife watching or nature based attractions	22%	21%
Food or wine trails/events	21%	18%
City based attractions	42%	41%
Don't know	10%	11%
None of these	12%	12%
NETT DOC interest Activities	58%	55%
NETT Adventure and Sport	54%	50%
NETT Wildlife and Nature	58%	53%
NETT Walks and Hikes	50%	48%

DOC1A. / DOC1B And which if any of the following, would you be likely to visit or take part in outside of the region you live in during the next six months? And thinking about the destinations and activities that you would consider, which one of these are you most likely, in the next six months, to visit or take part in?
Base: all adults 15+ in New Zealand likely to travel for a holiday or family visit in the next six months

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Between the end of July and mid-October, New Zealanders have not substantially re-assessed their planned domestic holiday destinations for the next six months

Intended destinations for all leisure and tourism activities
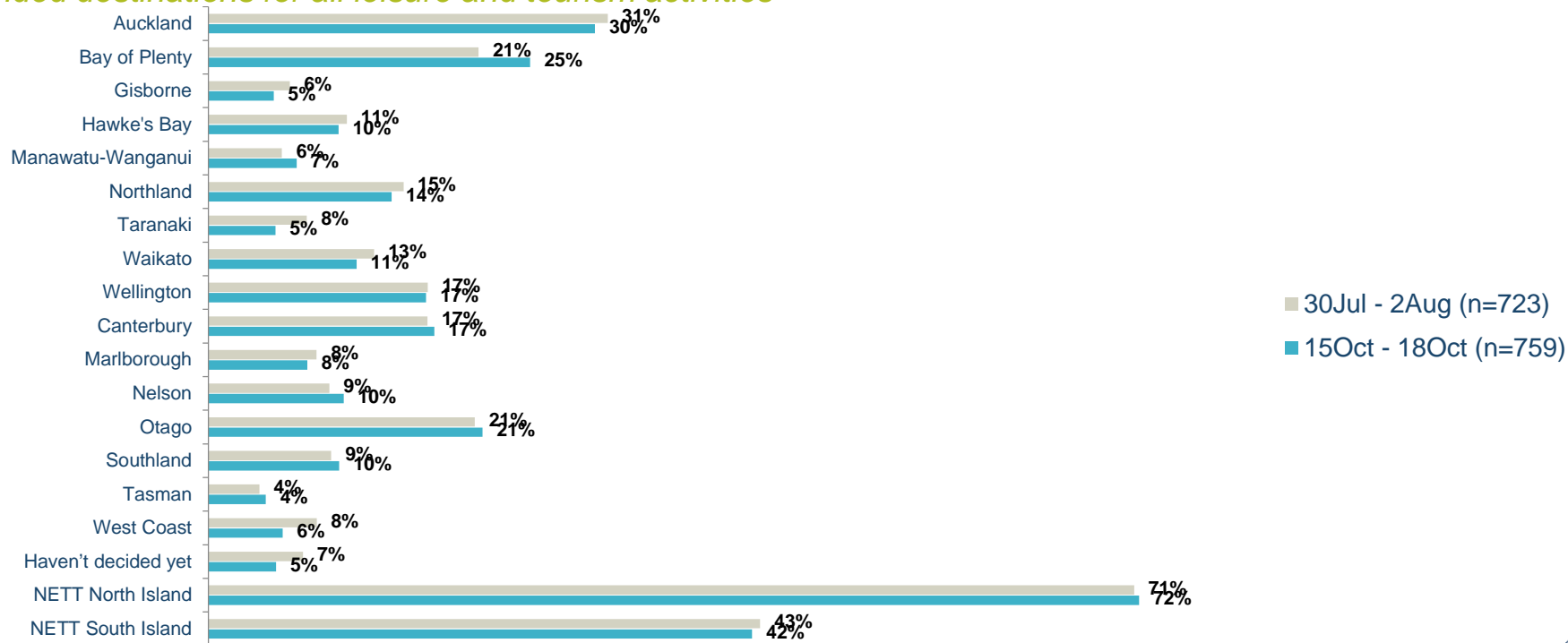
Destination	30Jul - 2Aug (n=723)	15Oct - 18Oct (n=759)
Auckland	31%	30%
Bay of Plenty	21%	25%
Gisborne	6%	5%
Hawke's Bay	11%	10%
Manawatu-Wanganui	6%	7%
Northland	15%	14%
Taranaki	8%	5%
Waikato	13%	11%
Wellington	17%	17%
Canterbury	17%	17%
Marlborough	8%	8%
Nelson	9%	10%
Otago	21%	21%
Southland	9%	10%
Tasman	4%	4%
West Coast	8%	6%
Haven't decided yet	7%	5%
NETT North Island	71%	72%
NETT South Island	43%	42%

DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?
Base: all adults 15+ in New Zealand with planning a specific activity

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For the most popular activities, the destinations match largely with where you would expect for North Island regions

Intended destinations for types of leisure and tourism activities – North Island

Auckland
- Beach and water activities: 32%
- Food or wine trails/events: 38%
- City based attractions: ▲ 42%

Bay of Plenty
- Beach and water activities: ▲ 38%
- Food or wine trails/events: 21%
- City based attractions: ▼ 16%

Gisborne
- Beach and water activities: 7%
- Food or wine trails/events: 10%
- City based attractions: 3%

Hawke's Bay
- Beach and water activities: 10%
- Food or wine trails/events: ▲ 28%
- City based attractions: 9%

Manawatu-Wanganui
- Beach and water activities: 5%
- Food or wine trails/events: 10%
- City based attractions: 9%

Northland
- Beach and water activities: ▲ 23%
- Food or wine trails/events: 6%
- City based attractions: ▼ 5%

Taranaki
- Beach and water activities: 5%
- Food or wine trails/events: 3%
- City based attractions: 6%

Waikato
- Beach and water activities: 13%
- Food or wine trails/events: 11%
- City based attractions: 9%

Wellington
- Beach and water activities: ▼ 12%
- Food or wine trails/events: 21%
- City based attractions: ▲ 33%

NETT North Island
- Beach and water activities: ▲ 80%
- Food or wine trails/events: 77%
- City based attractions: 74%

Legend:
- ■ Beach and water activities (n=265)
- ■ Food or wine trails/events (n=49)
- ■ City based attractions (e.g. museum, concert, sports game) (n=150)

DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?
Base: all adults 15+ in New Zealand with planning each activity type

▲ Indicates a statistically significant increase against total activities for this region
▼ Indicates a statistically significant decrease against total activities for this region

Beach activities are less of a draw for the South Island, but nearly two thirds of those planning food or wine trails are aiming to visit the island

Intended destinations for types of leisure and tourism activities – South Island

Canterbury
- Beach and water activities: 13%
- Food or wine trails/events: 20%
- City based attractions: 23%

Marlborough
- Beach and water activities: 6%
- Food or wine trails/events: ▲27%
- City based attractions: 5%

Nelson
- Beach and water activities: 8%
- Food or wine trails/events: ▲26%
- City based attractions: 12%

Otago
- Beach and water activities: ▼11%
- Food or wine trails/events: 28%
- City based attractions: ▲30%

Southland
- Beach and water activities: ▼5%
- Food or wine trails/events: 9%
- City based attractions: 8%

Tasman
- Beach and water activities: 4%
- Food or wine trails/events: 9%
- City based attractions: 4%

West Coast
- Beach and water activities: ▼3%
- Food or wine trails/events: 5%
- City based attractions: 6%

NETT South Island
- Beach and water activities: ▼30%
- Food or wine trails/events: ▲64%
- City based attractions: 46%

Legend:
- Beach and water activities (n=265)
- Food or wine trails/events (n=49)
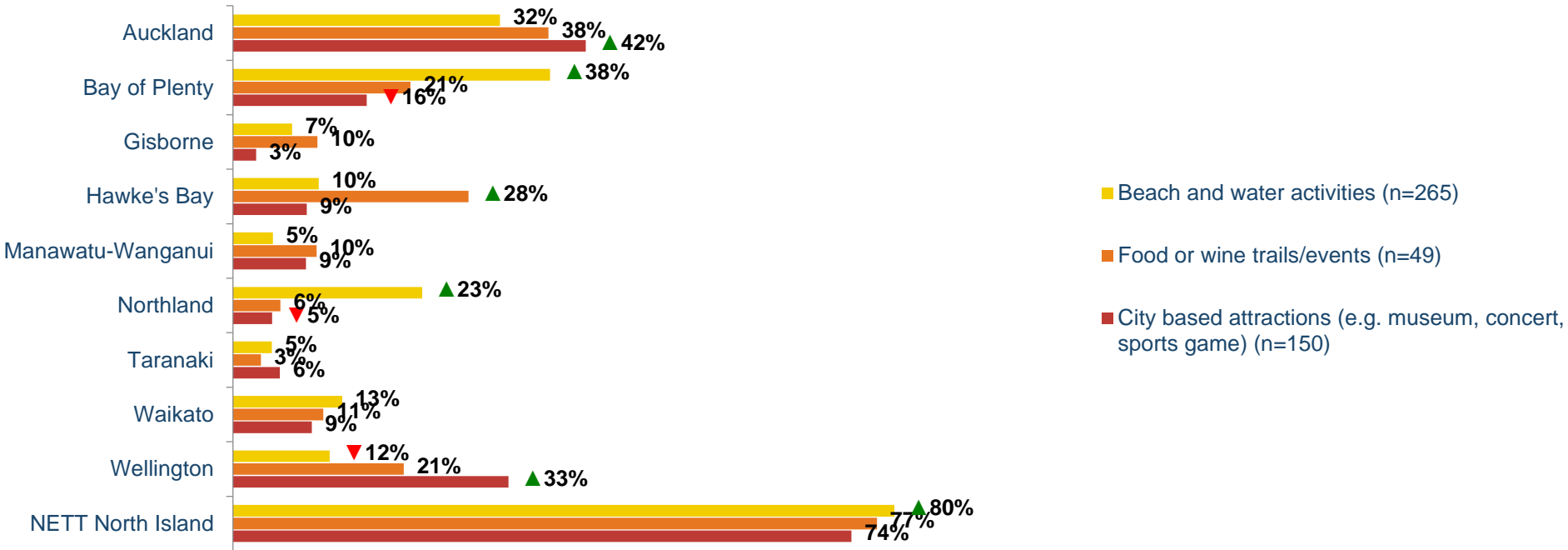- City based attractions (e.g. museum, concert, sports game) (n=150)

DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?
Base: all adults 15+ in New Zealand with planning each activity type

▲ Indicates a statistically significant increase against total activities for this region
▼ Indicates a statistically significant decrease against total activities for this region

Section 6 – Modal changes

Key findings – modal changes

Waka Kotahi objective – how and why is travel changing?

- Within the context of COVID-19 and changing travel restrictions it is important to understand how the transportation modes that New Zealanders are choosing have changed in response to this and which parts of the transport network are most impacted by these changes.

- At the national level, there has been a statistically significant increase in weekly public transport usage by New Zealanders for the first time in over a month.

- During this week, we also saw a statistically significant decrease in private vehicle usage for the first time since the start of lockdowns in April. If sustained, this could be indicative of a shift back from private vehicles to public transport.

- Stated public transport usage grew primarily due to more weekly bus passengers, although ferry and train usage was also directionally up by one or two points.

- The biggest shift in modes was in taxi usage, which increased to a statistically significant extent nationally, mostly driven by a doubling in stated weekly usage within Auckland.

- In Auckland, some passengers claimed to return to buses within the preceding week, but train usage remained at the lower levels seen in September while a number of lines were still closed for the week.

Nationally, October and the return to nationwide level 1 conditions saw a statistically significant peak in stated weekly public transport usage

Changes in mode usage by wave
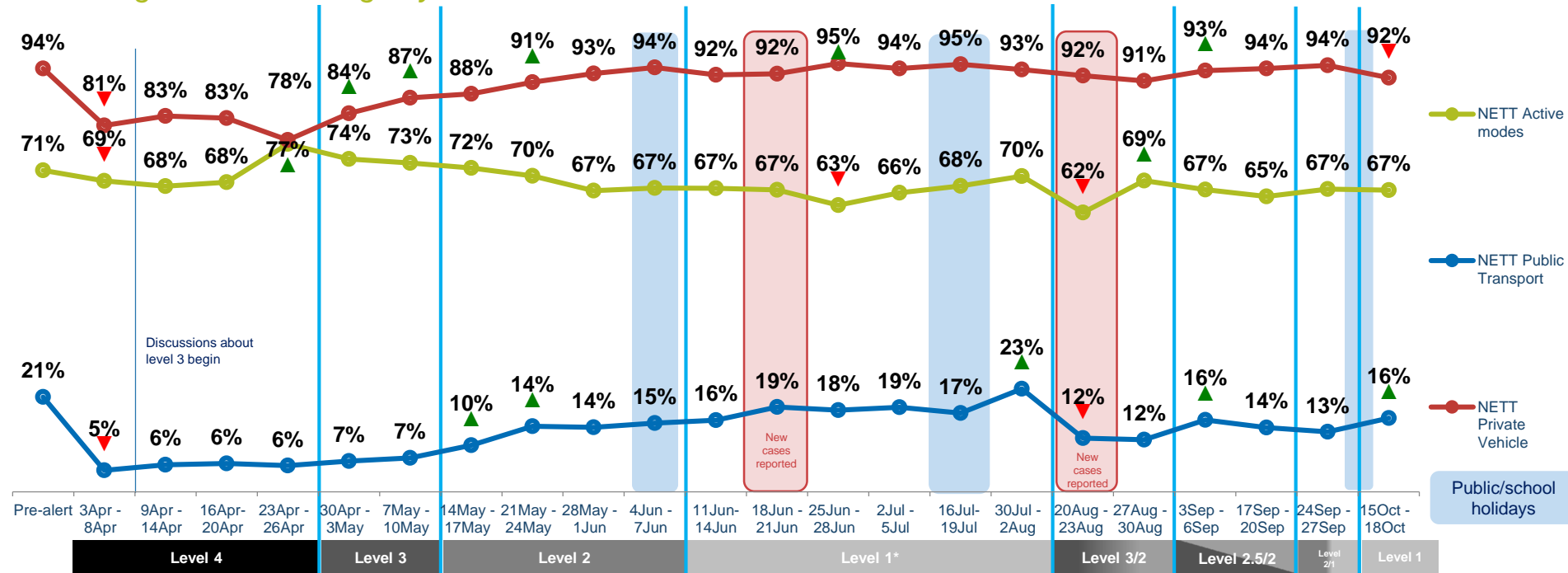
QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a *normal* week (eg in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

This is driven in part by a directional recovery in stated weekly usage of public transport within Auckland, following a month of directional declines

Changes in mode usage by wave – Auckland

NETT Active modes values: 70%, 68%, 62%, 69%, 77%, 78%, 68%, 74%, 67%, 71%, 66%, 68%, 67%, 68%, 60%, 63%, 64%, 66%, 60%, 63%, 69%, 64%, 65%, 66%

NETT Private Vehicle values: 92%, 81%, 84%, 83%, 77%, 87%, 88%, 89%, 89%, 91%, 93%, 91%, 89%, 93%, 92%, 94%, 93%, 90%, 87%, 92%, 92%, 93%, 91%

NETT Public Transport values: 30%, 8%, 9%, 10%, 8%, 10%, 11%, 16%, 22%, 16%, 21%, 18%, 30%, 24%, 27%, 22%, 31%, 11%, 13%, 22%, 19%, 17%, 20%

Discussions about level 3 begin

New cases reported

Public/school holidays

X-axis: Pre-alert, 3Apr - 8Apr, 9Apr - 14Apr, 16Apr - 20Apr, 23Apr - 26Apr, 30Apr - 3May, 7May - 10May, 14May - 17May, 21May - 24May, 28May - 1Jun, 4Jun - 7Jun, 11Jun - 14Jun, 18Jun - 21Jun, 25Jun - 28Jun, 2Jul - 5Jul, 16Jul - 19Jul, 30Jul - 2Aug, 20Aug - 23Aug, 27Aug - 30Aug, 3Sep - 6Sep, 17Sep - 20Sep, 24Sep - 27Sep, 15Oct - 18Oct

Levels: Level 4, Level 3, Level 2, Level 1*, Level 3/2, Level 2.5/2, Level 2/1, Level 1

QFREQ1/QFREQ2 – And in the course of a normal week, **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? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a _normal_ week (eg in February this year)? And which, if any of the following types of journeys did you make _during the last seven days_? Base: all adults 15+ in Auckland (n=c. 330 per wave)

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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All public transport modes saw directional recovery in October, and while this was only significant for taxis, the role of buses in the overall increase was largest

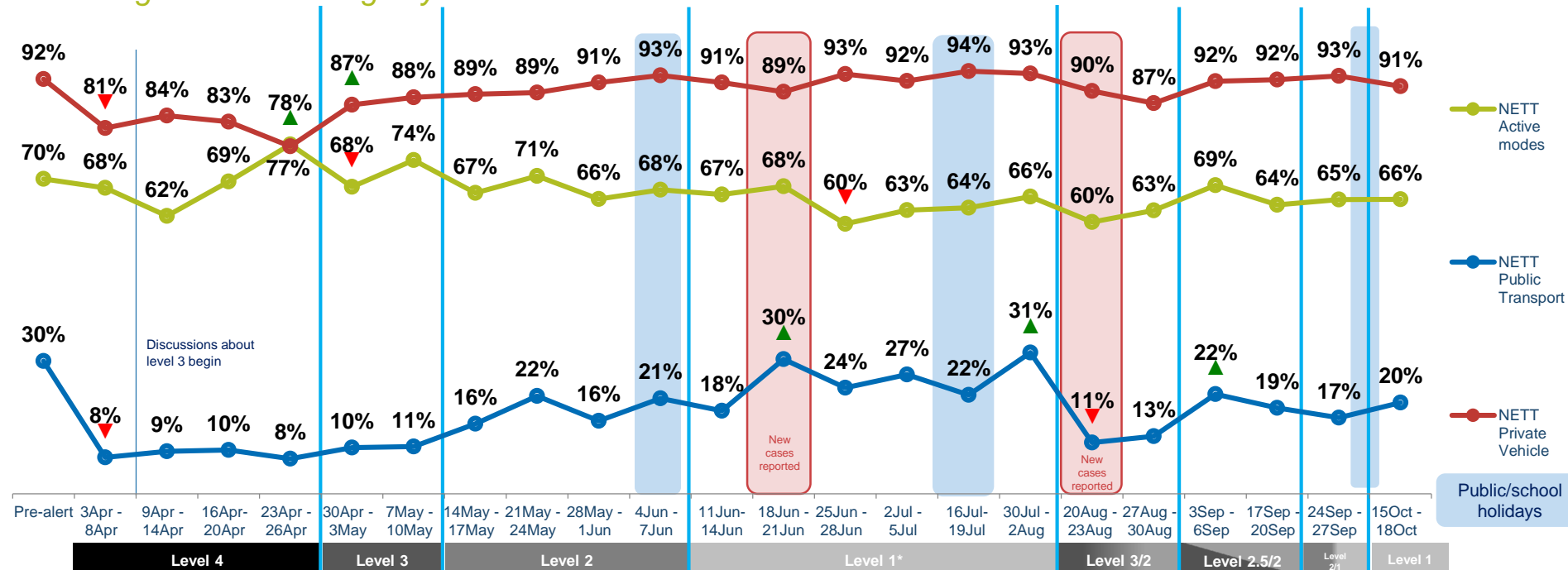*Changes in mode usage by wave*
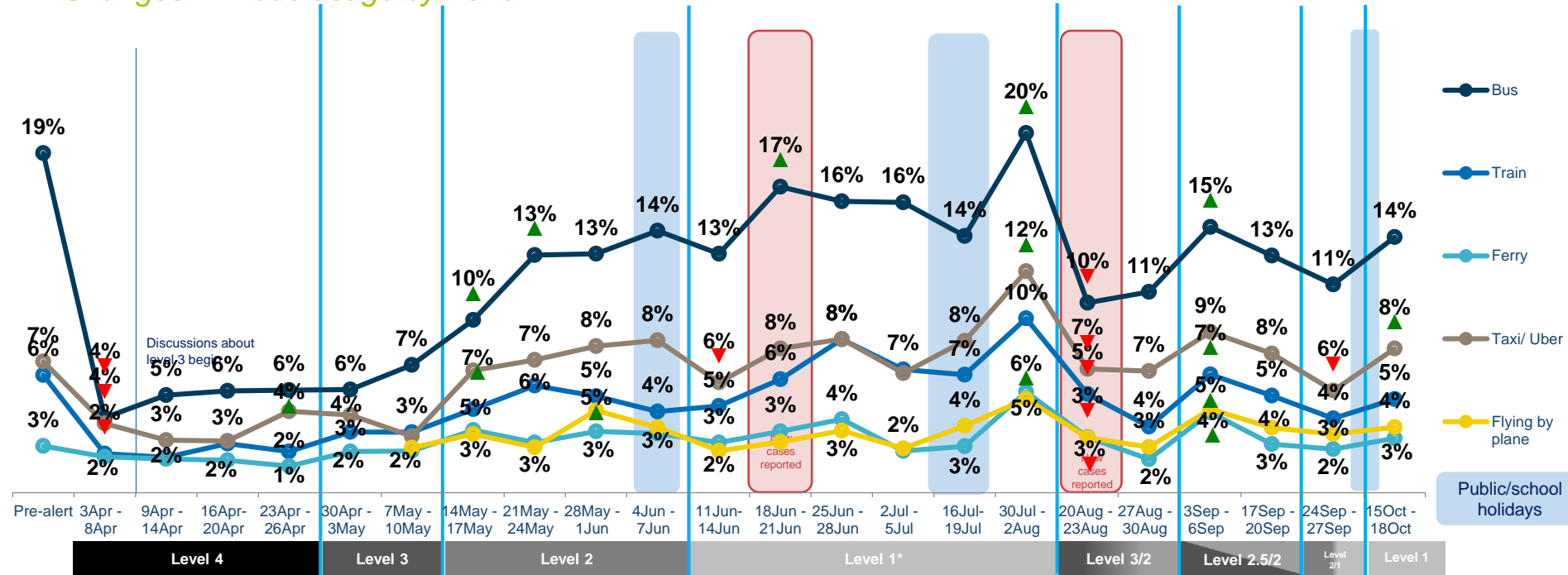
QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a _normal_ week (eg in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? *Base: all adults 15+ in New Zealand*

▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

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Auckland played a big role in taxi usage growth, doubling the weekly passenger rate, while train usage remained stable and buses recovering directionally

Changes in mode usage by wave – Auckland
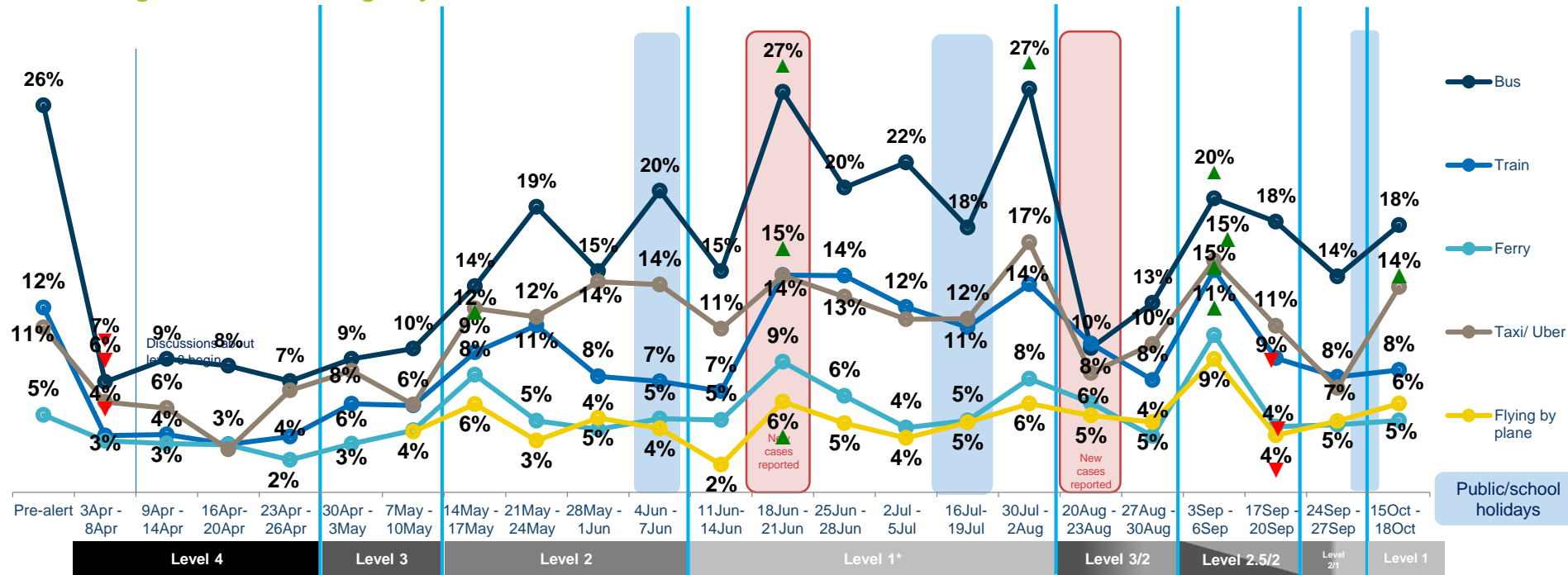
QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a *normal* week (eg in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in Auckland

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▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

New Zealand Government

Among those still staying off public transport, there hasn't been a tangible change in the factors keeping them off services

Reasons for decrease in PT activity

NETT Reduced need (grey line): 77%, 73%, 79%, 79%, 81%, 76%, 79%, 79%, 66%, 70%, 80%▲, 74%, 74%, 76%, 76%, 66%, 60%, 71%▲, 68%, 67%, 62%, 65%

NETT Accessibility issues (orange line): 47%, 44%, 44%, 44%, 41%, 38%, 46%, 43%, 36%, 46%, 29%▼, 34%, 25%, 31%, 30%, 40%, 46%, 44%, 52%, 42%, 38%, 37%

NETT Transmission concerns (yellow line): 21%, 26%, 19%, 20%, 17%, 13%, 24%▲, 26%, 26%, 29%, 13%▼, 16%, 24%, 17%, 25%, 35%, 28%, 21%, 21%, 30%, 25%, 26%

Time periods: 3Apr - 8Apr (n=235); 9Apr - 14Apr (n=216); 16Apr - 20Apr (n=249); 23Apr - 26Apr (n=259); 30Apr - 3May (n=217); 7May - 10May (n=238); 14May - 17May (n=249); 21May - 24May (n=207); 28May - 1Jun (n=174); 4Jun - 7Jun (n=174); 11Jun - 14Jun (n=156); 18Jun - 21Jun (n=161); 25Jun - 28Jun (=153); 2Jul - 5Jul (n=132); 16Jul - 19Jul (n=145); 30Jul - 2Aug (n=178); 20Aug - 23Aug (n=182); 27Aug - 30Aug (n=195); 3Sep - 6Sep (n=176); 17Sep - 20Sep (n=148); 24Sep - 27Sep (n=138); 15Oct - 18Oct (n=117)

Alert Levels: Level 4 | Level 3 | Level 2 | Level 1* | Level 3/2 | Level 2.5/2 | Level 2/1 | Level 1

New cases reported

For which, if any of the following reasons, has your use of public transport decreased?
Base: decreasing PT usage in past week

Section 7 – Working from home

Key findings – working from home

Waka Kotahi objective – understanding behaviour change

- Commuter traffic makes up a large proportion of the impact on transport infrastructure. As alert levels decrease and restrictions are relaxed, it's important to understand who will return to work travel and how, and who will continue to be absent from the commuter population.

- At a national level, the proportion working from home for most of the week has directionally declined to match rates seen during the original level 1 period. This is driven in part by the nine-point decrease that occurred in Auckland during this time.

- There are marginal skews towards working from home on Mondays and Fridays, but these currently seem to be too small to have a real tangible impact on various transportation networks.

- The proportion of public transport commuters working from home is at the lowest level recorded during this research, although public transport continues to be disproportionately affected compared to other commuter modes.

After remaining stable through September, there has been a directional decrease in the proportion working from home for the first time since new cases were reported

Proportion working in and out of home by survey wave

NETT Mainly out of home

NETT Mainly/ completely from home

Public/school holidays

Discussions about level 3 begin

New cases reported

New cases reported

Pre-alert: 89%, 9%
3Apr - 8Apr: 47%, 47%
9Apr - 14Apr: 51%, 47%
16Apr - 20Apr: 51%, 46%
23Apr - 26Apr: 53%, 46%
30Apr - 3May: 54%, 44%
7May - 10May: 53%, 46%
14May - 17May: 59%, 40%
21May - 24May: 69%, 31%
28May - 1Jun: 72%, 27%
4Jun - 7Jun: 73%, 27%
11Jun - 14Jun: 78%, 21%
18Jun - 21Jun: 78%, 20%
25Jun - 28Jun: 78%, 21%
2Jul - 5Jul: 80%, 18%
16Jul - 19Jul: 78%, 22%
30Jul - 2Aug: 79%, 20%
20Aug - 23Aug: 71%, 28%
27Aug - 30Aug: 76%, 23%
3Sep - 6Sep: 76%, 23%
17Sep - 20Sep: 75%, 24%
24Sep - 27Sep: 76%, 23%
15Oct - 18Oct: 79%, 20%

Level 4 | Level 3 | Level 2 | Level 1* | Level 3/2 | Level 2.5/2 | Level 2/1 | Level 1

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 Auckland who are usually working

△ Indicates a statistically significant increase from previous wave
▽ Indicates a statistically significant decrease from previous wave

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New Zealand Government

Although not statistically significant, this movement has been most pronounced in Auckland, with a nine point swing

Proportion working in and out of home by survey wave – Auckland

NETT Mainly out of home

NETT Mainly/ completely from home

Discussions about level 3 begin

New cases reported

Public/school holidays

Pre-alert	3Apr - 8Apr	9Apr - 14Apr	16Apr - 20Apr	23Apr - 26Apr	30Apr - 3May	7May - 10May	14May - 17May	21May - 24May	28May - 1Jun	4Jun - 7Jun	11Jun - 14Jun	18Jun - 21Jun	25Jun - 28Jun	2Jul - 5Jul	16Jul - 19Jul	30Jul - 2Aug	20Aug - 23Aug	27Aug - 30Aug	3Sep - 6Sep	17Sep - 20Sep	24Sep - 27Sep	15Oct - 18Oct

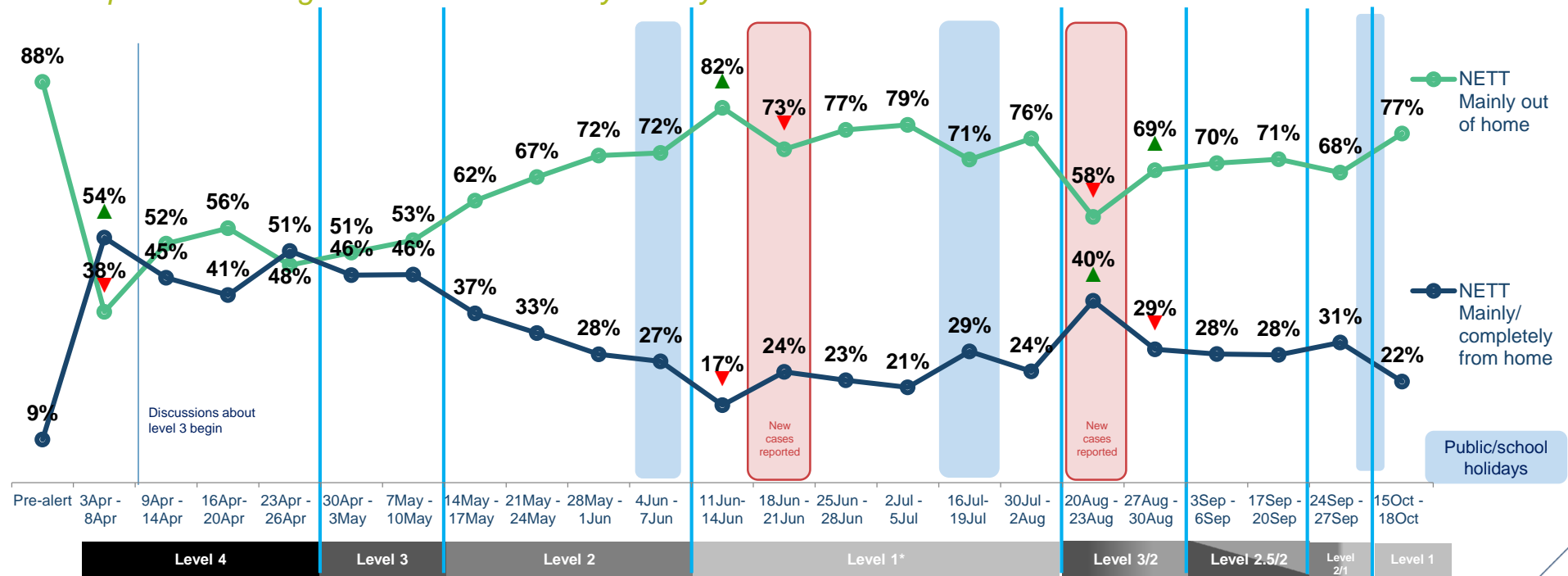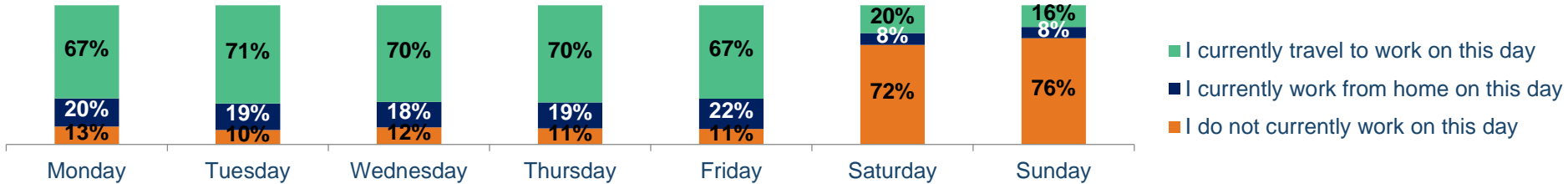| Level 4	Level 3	Level 2	Level 1*	Level 3/2	Level 2.5/2	Level 2/1	Level 1

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 Auckland who are usually working

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▲ Indicates a statistically significant increase from previous wave
▼ Indicates a statistically significant decrease from previous wave

New Zealand Government

At present, the proportion working from home on each week day remains stable at around a fifth, with some slight skews at either end of the working week

Current days work from home/out of home

Legend:
- ■ I currently travel to work on this day
- ■ I currently work from home on this day
- ■ I do not currently work on this day

Current days work from home/out of home (top chart):

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
I currently travel to work on this day	67%	71%	70%	70%	67%	20%	16%
I currently work from home on this day	20%	19%	18%	19%	22%	8%	8%
I do not currently work on this day	13%	10%	12%	11%	11%	72%	76%

All with fixed "on-site" days

All with fixed "on-site" days (bottom chart):

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
I currently travel to work on this day	77%	80%	81%	81%	77%	23%	18%
I currently work from home on this day	10%	10%	6%	8%	12%	5%	4%
I do not currently work on this day	12%	10%	12%	12%	11%	72%	78%

Those stating that they have designated 'in-work' days do not have a significantly different pattern of days, but generally work from home about half as much as the general working population.

QWORK2E_NEW: Thinking about the last week, for each day, please state your current work arrangements:
Base: all adults 15+ in New Zealand currently working away from home (n=648) all currently working set days from work (n=444)

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New Zealand Government

The proportion of public transport commuters working from home is at the lowest level recorded yet, indicating some diminishing of impact

Proportion of commuters <u>working from home</u> who would <u>normally travel by each mode</u>

- ■ NETT Active modes
- ■ NETT Public transport
- ■ NETT Private vehicle

Proportion who would normally work from home — 9%

	Level 4 & 3 (n=1299)	Level 2 (n=685)	Level 1 (n=589)	Level 2/3 (n=232)	Level 2/2.5 (n=216)	Level 1/2 (n=112)	Level 1 (2nd) (n=86)
Proportion working from home	**47%** (L3 & 4)	**31%** (L2)	**20%** (L1)	**25%** (L2/L3)	**23%** (L2/L2.5)	**23%** (L1/2)	**20%** (L1)
NETT Active modes	11%	11%	11%	9%	10%	11%	9%
NETT Public transport	16%	19%	18%	20%	17%	23%	18%
NETT Private vehicle	72%	69%	70%	70%	73%	65%	70%

Proportion of each commuter type working from home

Proportion WFH by level	47%	31%	20%	25%	23%	23%	20%
Within active mode commuters	53%	31% ▼	17% ▼	19%	17%	19%	12%
Within private vehicle commuters	43%	25% ▼	13% ▼	18% ▲	16%	14%	14%
Within public transport commuters	62%	42% ▼	24% ▼	38% ▲	33%	36%	20% ▼

QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work? By QMODE1_1 How would you normally make each of the following types of journeys listed below? – travelling to work
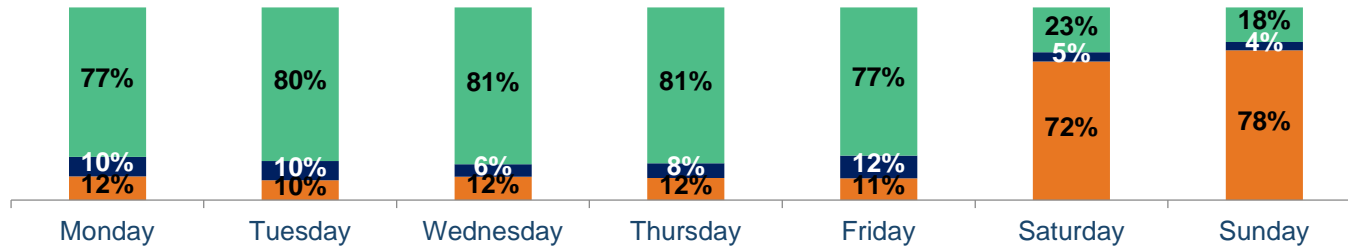*Base: all adults 15+ in New Zealand who normally commute by each of the modes mentioned*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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New Zealand Government

Section 8 – Access to commerce
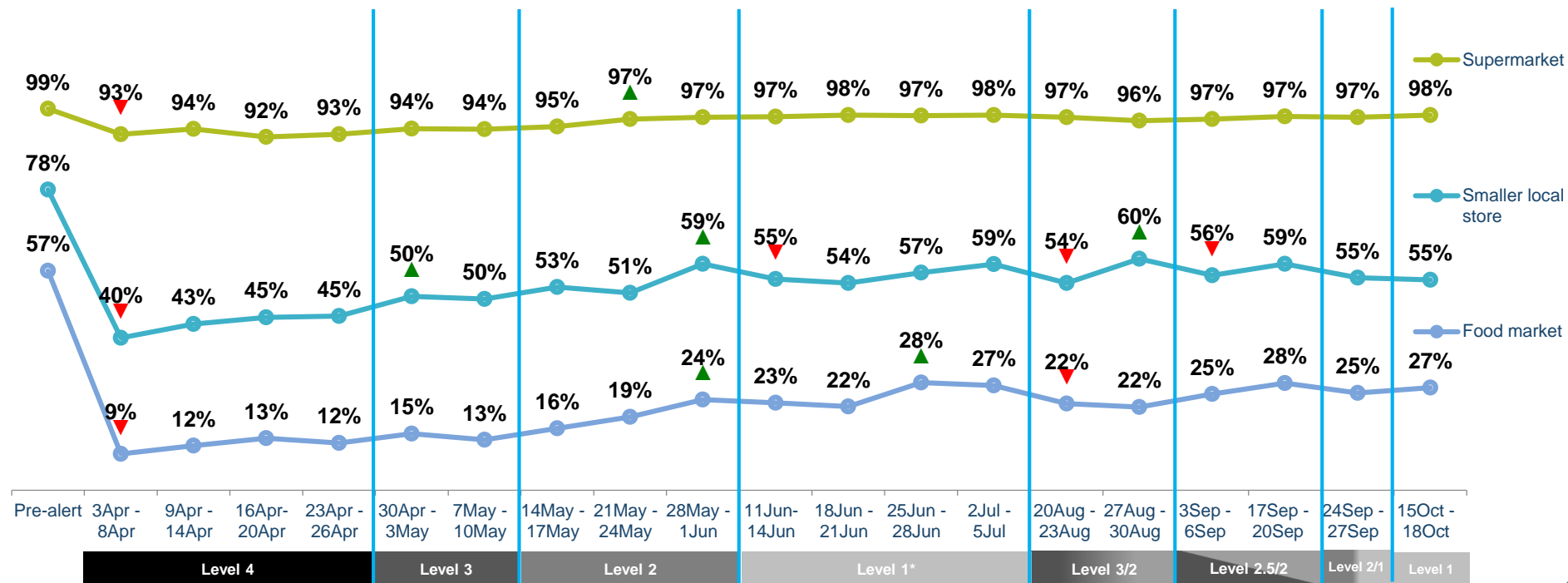
Key findings – Access to commerce

Waka Kotahi objective – understanding behaviour change

- COVID-19 had a variety of impacts on New Zealand society, including on personal income, immediate needs and purchasing behaviours. It is therefore valuable to understand how this could impact on the small and big purchases that New Zealanders are making or planning in the immediate and longer term.

- While physical stores were largely unaffected by the second lockdown, usage of online specialist stores fell away significantly as level 2 lockdown ended in Auckland.

- Around one in five New Zealanders indicated that their recent vehicle purchasing choices had been somewhat impacted by COVID-19, either delaying or bringing forward a purchase depending on how they had assessed the situation.

- In reality, while there was a significant decrease in the number of purchases made during the first and second lockdown periods compared to the proportion planning a purchase before lockdown, vehicle purchasing still took place and it is not clear whether or not the volume of foregone purchases is significantly greater than it would otherwise have been due to other delaying factors.

- Bike and e-bike purchase appears to have been less impacted during the second lockdown period, perhaps helped by the reduced financial risk involved in the purchase and the fact that intended purchase levels were already quite low anyway.

- While future purchase intent appears higher for active mode vehicles like bikes, e-bikes and e-scooters than for electric cars, traditional diesel and petrol powered vehicles still have higher future purchase intent.

The only significant impact of the second lockdown period has been the growth of local grocery store usage during the level 3/2 peak

Normal week and most recent week shopping trips taken by survey wave – physical

Supermarket

Pre-alert	3Apr-8Apr	9Apr-14Apr	16Apr-20Apr	23Apr-26Apr	30Apr-3May	7May-10May	14May-17May	21May-24May	28May-1Jun	11Jun-14Jun	18Jun-21Jun	25Jun-28Jun	2Jul-5Jul	20Aug-23Aug	27Aug-30Aug	3Sep-6Sep	17Sep-20Sep	24Sep-27Sep	15Oct-18Oct
99%	93% ▼	94%	92%	93%	94%	94%	95%	97% ▲	97%	97%	98%	97%	98%	97%	96%	97%	97%	97%	98%

Smaller local store

| 78% | 40% ▼ | 43% | 45% | 45% | 50% ▲ | 50% | 53% | 51% | 59% ▲ | 55% ▼ | 54% | 57% | 59% | 54% ▼ | 60% ▲ | 56% ▼ | 59% | 55% | 55% |

Food market

| 57% | 9% ▼ | 12% | 13% | 12% | 15% | 13% | 16% | 19% | 24% ▲ | 23% | 22% | 28% ▲ | 27% | 22% ▼ | 22% | 25% | 28% | 25% | 27% |

Level 4 | **Level 3** | **Level 2** | **Level 1*** | **Level 3/2** | **Level 2.5/2** | **Level 2/1** | **Level 1**

QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days? *Base: all adults who ever grocery shop)*

△ Indicates a statistically significant increase from previous wave
▽ Indicates a statistically significant decrease from previous wave

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E-commerce as a grocery shopping channel has been a little more affected, and directional growth in usage during the lockdown has fallen away for online specialists

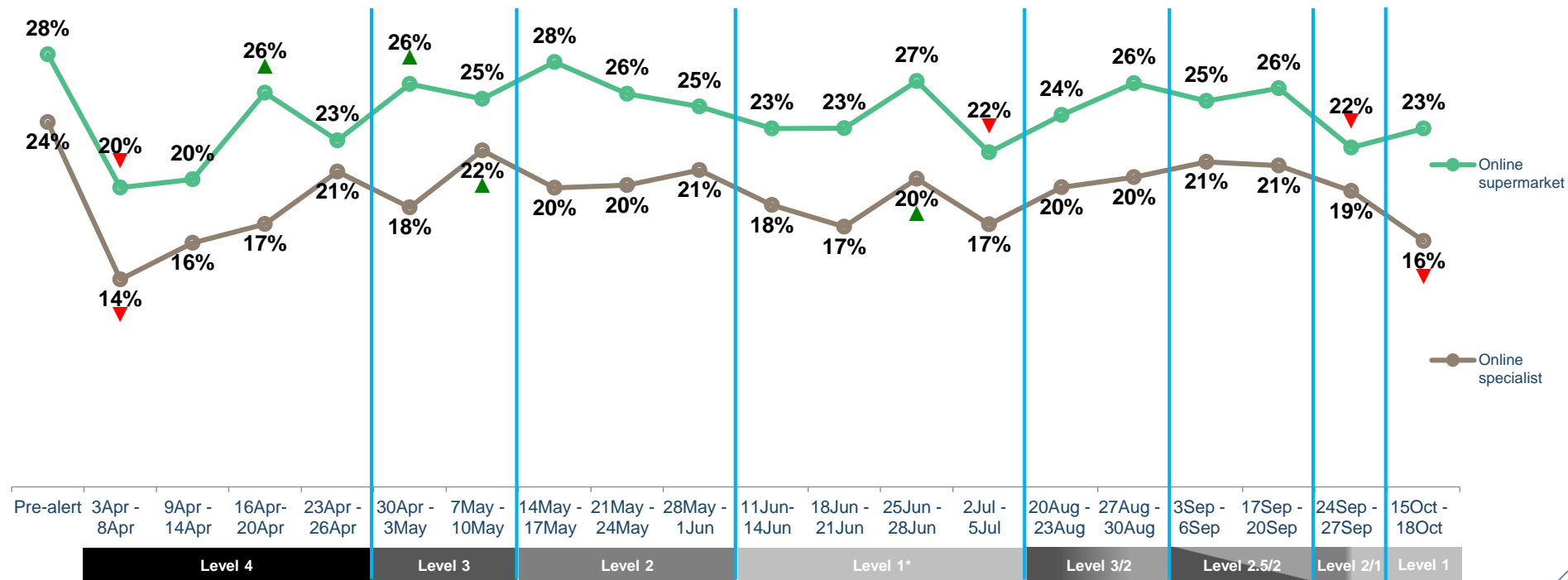*Normal week and most recent week shopping trips taken by survey wave – online*

QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days? *Base: all adults who ever grocery shop)*

△ Indicates a statistically significant increase from previous wave
▽ Indicates a statistically significant decrease from previous wave

While the impact on active mode **vehicle** purchase has been lesser, this could be a reflection of lower initial purchase intent, rather than suppressed purchasing

EV/ICE* purchase behaviours in response to COVID-19

Bike/e-bike/e-scooter purchase behaviours

20% Any impact

| 13% |
| 4% |
| 4% |
| 78% |

2Jul - 5Jul (n=1230)

19% Any impact

| 14% |
| 3% |
| 3% |
| 78% |

15Oct - 18Oct (n=1220)

12% Any impact

| 6% |
| 3% |
| 3% |
| 86% |

15Oct - 18Oct (n=1220)
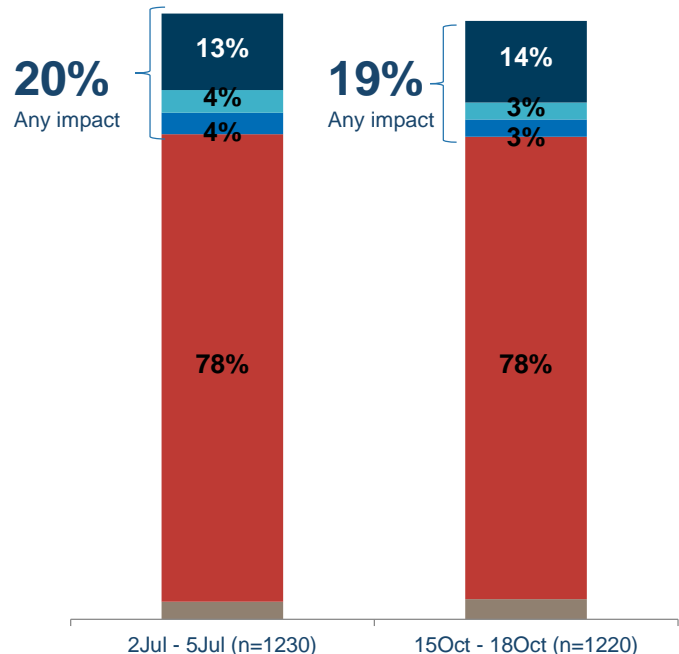
Legend:
- ■ I have delayed purchasing a vehicle because of COVID-19 or a change in circumstances relating to COVID-19
- ■ I have purchased a different type of vehicle because of COVID-19 or a change in circumstances relating to COVID-19
- ■ I purchased a vehicle sooner than I planned because I was worried about supply chain issues and car availability if I waited any longer.
- ■ None of these
- ■ Don't know/can't remember
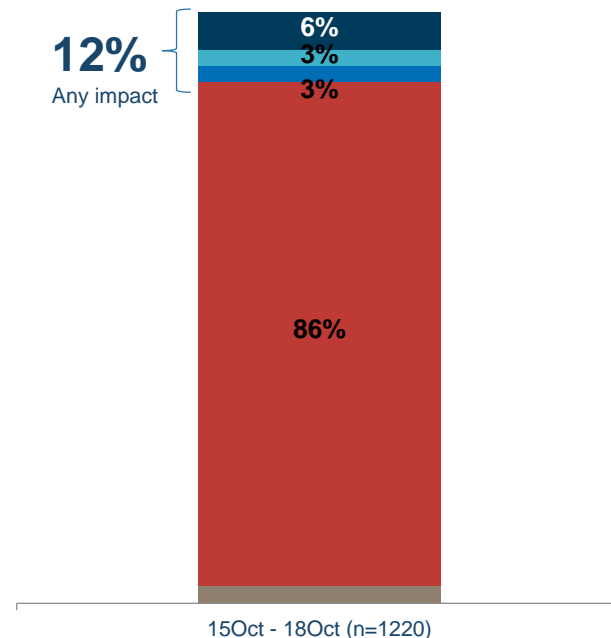
CARPURCHASE4: Which, if any of the following applies to you?
Base: all adults 15+ in New Zealand in wave 14 (n=1,230) or wave 22 (n=1,220)
Note: bikes, e-bikes and e=scooters asked I wave 22 only

* ICE = Internal Combustion Engine

New vehicle purchases still took place during the initial lockdown, with the volume of purchases only dropping a little from pre-lockdown intent

Planned vehicle purchases before lockdown

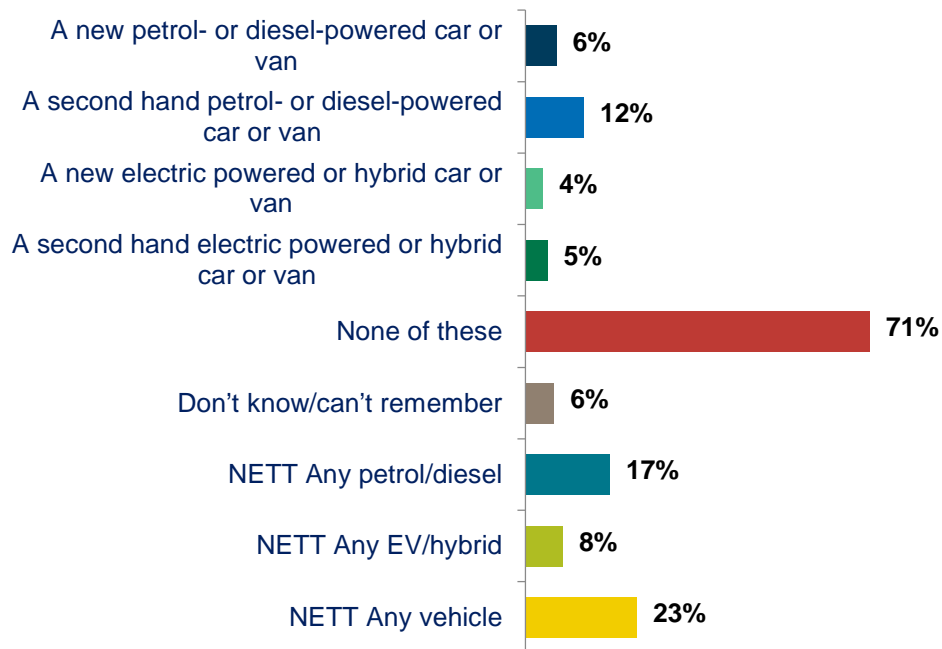| Category	%
A new petrol- or diesel-powered car or van	6%
A second hand petrol- or diesel-powered car or van	12%
A new electric powered or hybrid car or van	4%
A second hand electric powered or hybrid car or van	5%
None of these	71%
Don't know/can't remember	6%
NETT Any petrol/diesel	17%
NETT Any EV/hybrid	8%
NETT Any vehicle	23%

Vehicle purchases during _initial_ lockdown
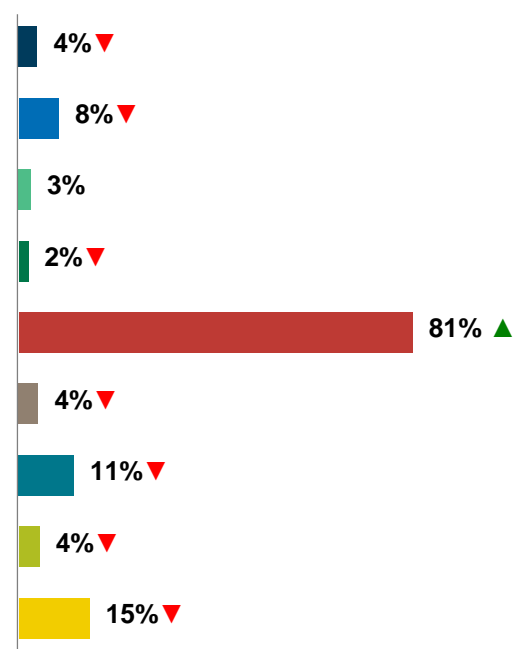
Category	%	
A new petrol- or diesel-powered car or van	4%	▼
A second hand petrol- or diesel-powered car or van	8%	▼
A new electric powered or hybrid car or van	3%	
A second hand electric powered or hybrid car or van	2%	▼
None of these	81%	▲
Don't know/can't remember	4%	▼
NETT Any petrol/diesel	11%	▼
NETT Any EV/hybrid	4%	▼
NETT Any vehicle	15%	▼

CARPURCHASE1/CARPURCHASE2: Which, if any, of the following purchases were you planning on making before any COVID-19 alert or lockdown (ie in March 2020), either by yourself or as a household? And which, if any, of the following have you or someone in your household bought during the past four months (ie since March 2020)?
Base: all adults 15+ in New Zealand in wave 14 (n=1,230)

△ Indicates a statistically significant increase against pre-lockdown purchase intention
▽ Indicates a statistically significant decrease against pre-lockdown purchase intention

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The impact during the second lockdown was similar, with purchases only a little lower than initial intent

Planned vehicle purchases before lockdown

Category	%
A new petrol- or diesel-powered car or van	6%
A second hand petrol- or diesel-powered car...	11%
A new electric powered or hybrid car or van	5%
A second hand electric powered or hybrid car...	3%
A new or second hand bicycle (including any...	4%
A new or second hand electric bicycle	2%
A new or second hand electric scooter	1%
None of these	69%
Don't know/can't remember	5%
NETT Any petrol/diesel	17%
NETT Any EV/hybrid	7%
NETT Any Electric bike/scooter	4%
NETT Any bicycle	6%
NETT Any car or van	22%
NETT Any active mode vehicle	7%
NETT Any vehicle	26%

Vehicle purchases during <u>second</u> lockdown

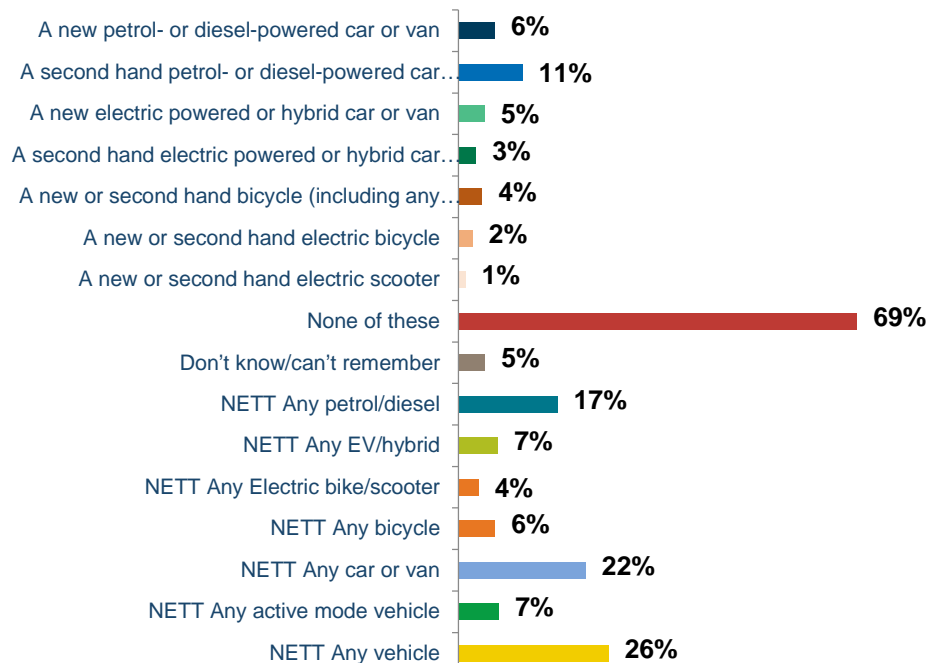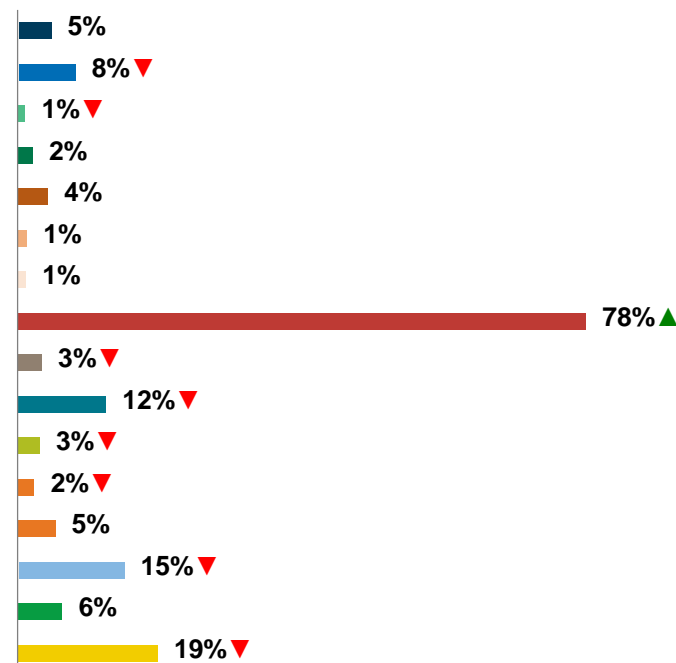| Category	%	
A new petrol- or diesel-powered car or van	5%	
A second hand petrol- or diesel-powered car...	8%	▼
A new electric powered or hybrid car or van	1%	▼
A second hand electric powered or hybrid car...	2%	
A new or second hand bicycle (including any...	4%	
A new or second hand electric bicycle	1%	
A new or second hand electric scooter	1%	
None of these	78%	▲
Don't know/can't remember	3%	▼
NETT Any petrol/diesel	12%	▼
NETT Any EV/hybrid	3%	▼
NETT Any Electric bike/scooter	2%	▼
NETT Any bicycle	5%	
NETT Any car or van	15%	▼
NETT Any active mode vehicle	6%	
NETT Any vehicle	19%	▼

CARPURCHASE1/CARPURCHASE2: Which, if any, of the following purchases were you planning on making before any COVID-19 alert or lockdown (ie in March 2020), either by yourself or as a household? And which, if any, of the following have you or someone in your household bought during the past four months (ie since March 2020)?
Base: all adults 15+ in New Zealand in wave 22 (n=1,220)

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Future consideration of second hand petrol or diesel vehicles remains greater than for any other vehicle type

Future vehicle purchase consideration

Vehicle type	Certain to / Very likely to	Fairly likely	Neither likely nor unlikely	Fairly unlikely	Very unlikely	Certain not to
A new petrol- or diesel-powered car or van		6%	11%	10%	18%	49%
A second hand petrol- or diesel-powered car or van		7%	10%	10%	19%	46%
A new electric powered or hybrid car or van		4%	9%	7%	18%	55%
A second hand electric powered or hybrid car or van		4%	8%	8%	18%	55%
A new or second hand bicycle (including any non-electric road or mountain bike)		5%	8%	9%	16%	56%
A new or second hand electric bicycle		5%	9%	9%	17%	56%
A new or second hand electric scooter		3%	7%	7%	16%	62%

Legend:
- Certain to
- Very likely to
- Fairly likely
- Neither likely nor unlikely
- Fairly unlikely
- Very unlikely
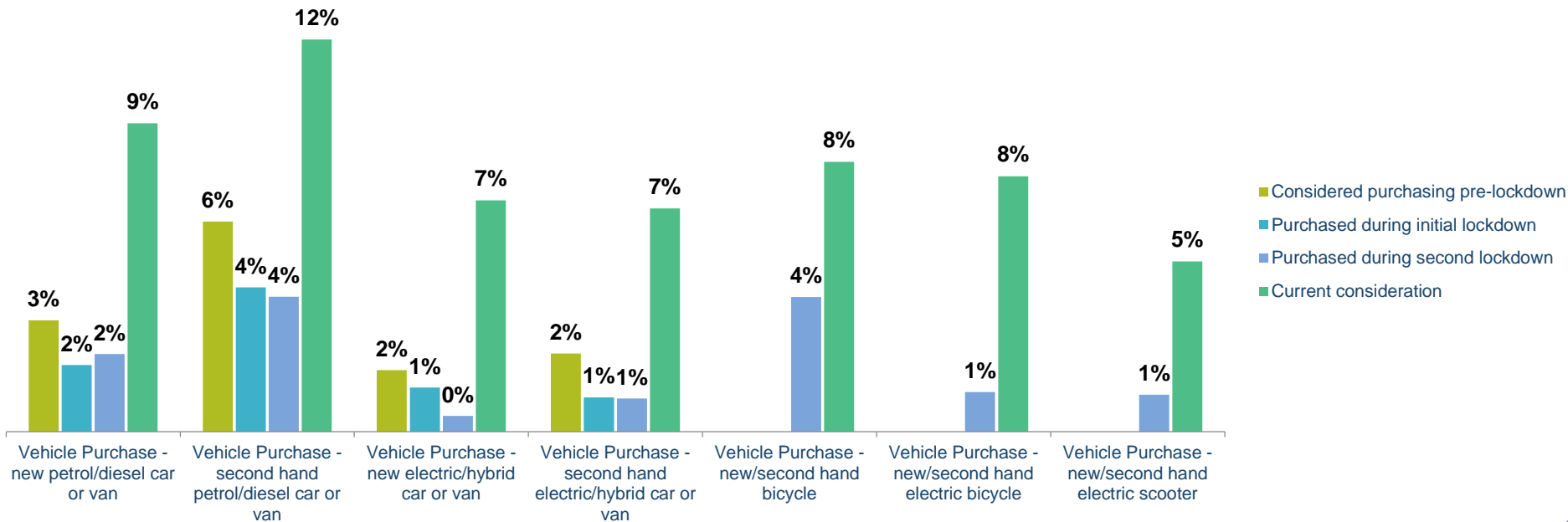- Certain not to
- Don't know

CARPURCHASE3: And how likely are you to purchase each of the following in the next few months?
Base: all adults 15+ in New Zealand in wave 22 (n=1,220)

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Bikes and electric bikes outstrip EVs on recent purchase and future purchase intent, but traditional ICE* vehicles are most popular on these metrics

Derived impact on vehicle purchasing

Legend:
- Considered purchasing pre-lockdown
- Purchased during initial lockdown
- Purchased during second lockdown
- Current consideration

Categories and values:

Vehicle Purchase - new petrol/diesel car or van: 3%, 2%, 2%, 9%

Vehicle Purchase - second hand petrol/diesel car or van: 6%, 4%, 4%, 12%

Vehicle Purchase - new electric/hybrid car or van: 2%, 1%, 0%, 7%

Vehicle Purchase - second hand electric/hybrid car or van: 2%, 1%, 1%, 7%

Vehicle Purchase - new/second hand bicycle: 4%, 8%

Vehicle Purchase - new/second hand electric bicycle: 1%, 8%

Vehicle Purchase - new/second hand electric scooter: 1%, 5%

CARPURCHASE3: And how likely are you to purchase each of the following in the next few months?
Base: all adults 15+ in New Zealand in wave 14 (n=1,230) or wave 22 (n=1,220) or both (n=2,450) note, only wave 22 included in future consideration,*

* ICE = Internal Combustion Engine

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