

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1 – 7 weekly core report

19 May 2020

Disclaimer

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

In order to support an agile response to the unfolding COVID-19 pandemic, we are releasing regular key insights from the preliminary findings prior to this work being finalised. Please note that these deliverables are part of an ongoing research project and have not yet been through a formal peer review process.

While Waka Kotahi provided investment, the research is being 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 weekly basis

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

Overview of research (i)

Research design and outputs

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

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

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

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

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

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

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



Example: Harmony Dashboard Page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys 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, enjoyment of 'quiet streets', intention to return children to school, etc.

Report notes (i)

Key information to note for this report

- This report is based on the six waves of fieldwork:
 - wave 1 data collected Friday 3 April to Wednesday 8 April;
 - wave 2 data collected Thursday 9 April to Tuesday 14 April;
 - wave 3 data collected Thursday 16 April to Monday 20 April;
 - wave 4 data collected Thursday 23 April to Sunday 26 April;
 - wave 5 data collected Thursday 30 April to Sunday 3 May;
 - wave 6 data collected Thursday 7 May to Sunday 10 May;
 - wave 7 data collected Thursday 14 May to Sunday 17 May.
- Total sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves (all conducted under level 4 alert), combined sum of waves 5 and 6 (under level 3 alert), as well as individual waves where appropriate.
- Waves 1-4 of fieldwork were completed under a level 4 alert in New Zealand, waves 5 and 6 were under a level 3 alert and wave 7 under level 2.
- The focus of this report is tracking the trends and changes over time and how New Zealanders have adjusted their use of transport and travel behaviour. As this study was not conducted prior to level 4 restrictions, respondents were asked to recall their transport and travel behaviour prior to level 4 restrictions based on a '*normal week*' ie in February this year.
- At a total population level, significance testing indicated in this wave 7 report is based on a statistically significant shift of results between waves 1 to 7, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results.
- At a sub-population level, significance testing indicates a statistically significant difference between the sub-population and the base or total population. The total population benchmark is based on the total sample base collected across all four waves.

Report notes (ii)

Key transport terms and demographic groupings

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

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

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

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

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

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

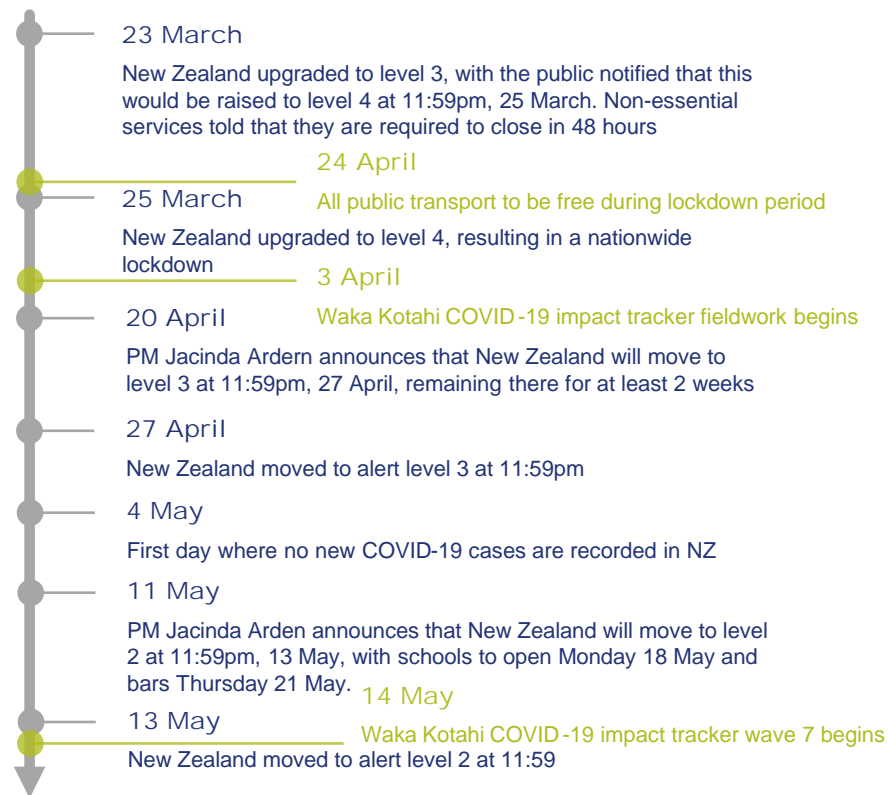
COVID-19 vulnerable: All respondents indicating that they personally have a medical condition that makes them acutely vulnerable to COVID-19, such as heart disease, hypertension, chronic respiratory disease or cancer.


Sample structure and further definitions

	Definition	Total Sample		Waves 1 - 4		Waves 5 - 6		Wave 7	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*
Total		n=6,327	1.23	n=5,060	1.38	n=2,532	1.95	n=1,263	2.76
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,655	2.41	n=1,324	2.69	n=662	3.81	n=331	5.39
Tauranga	All living in the city of Tauranga	n=500	4.38	n=400	4.9	n=200	6.93	n=100	9.8
Hamilton	All living in the city of Hamilton	n=500	4.38	n=400	4.9	n=200	6.93	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=907	3.25	n=684	3.75	n=418	4.79	n=221	6.59
Christchurch	All living in the city of Christchurch	n=500	4.38	n=400	4.9	n=200	6.93	n=100	9.8
Dunedin	All living in the city of Dunedin	n=498	4.39	n=398	4.91	n=200	6.93	n=100	9.8
Rest of NZ	All living in areas outside of those noted above	n=1,767	2.33	n=1,454	2.57	n=652	3.84	n=321	5.47
Any Disability	See previous page	n=707	3.69	n=550	4.18	n=297	5.69	n=145	8.14
COVID-19 Vulnerable	See previous page	n=1,527	2.51	n=1,230	2.79	n=597	4.01	n=280	5.86
Aged 70 + years	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over	n=786	3.5	n=618	3.94	n=315	5.52	n=148	8.28

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

Context: New Zealand COVID-19 timeline





Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–7

Waka Kotahi COVID-19 transport impact tracker

- In general, the first few days of level 2 conditions have yet to impact significantly on people's out of home activities, but there are early indications that this could change rapidly with more time in level 2.
- The only significant change to reported local journeys taken has been in the proportion travelling for work, now almost double the proportion recorded in level 4.
- While private vehicles are still the dominant mode of travel, public transport usage is resurgent and the number of users has returned to almost half the normal level. Note that this does not necessarily equate to an equivalent increase in the number of trips being made.
 - Reported accessibility issues have increased for the first time and may act as a ceiling on this increase.
 - Alongside increased use, consideration of all public transport modes has also improved significantly during this wave, as more people anticipate returning to the workplace full time in the near future.
- Domestic journeys between region are now possible, although in the early days of level 2, the uptake of these has been low.
 - Where these journeys are taken, private vehicles (particularly the car) are the dominant mode used, though this may change once flying returns to normal and when domestic journey uptake picks up.
- When it comes to domestic journeys and domestic tourism, the desire to see family and friends is a bigger draw than anything else, with this one of the major long-distance journeys already taken and the dominant journey planned for in the medium term.
- As stores have opened, the impact on click and collect or delivery of online purchases has been minimal.
- With the expansion of school openings on 18 May, over a third of parents will have returned their children to school. However, there is still hesitancy among around a quarter of parents to go back to the school-run.

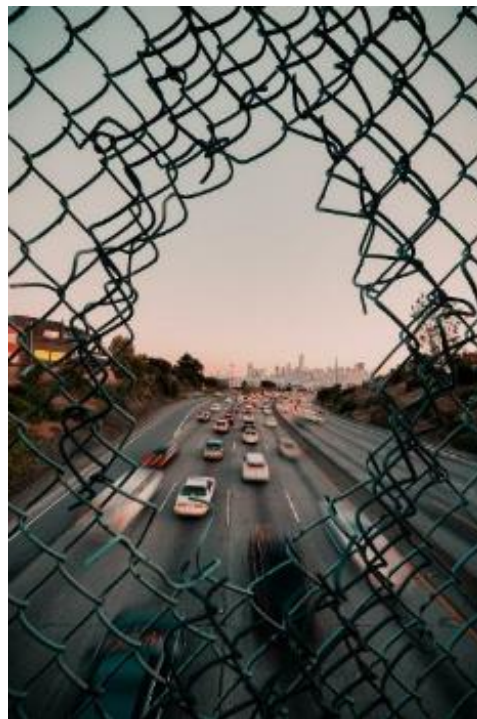


Section 3 – COVID 19 travel behaviour

Key findings – COVID-19 travel behaviour

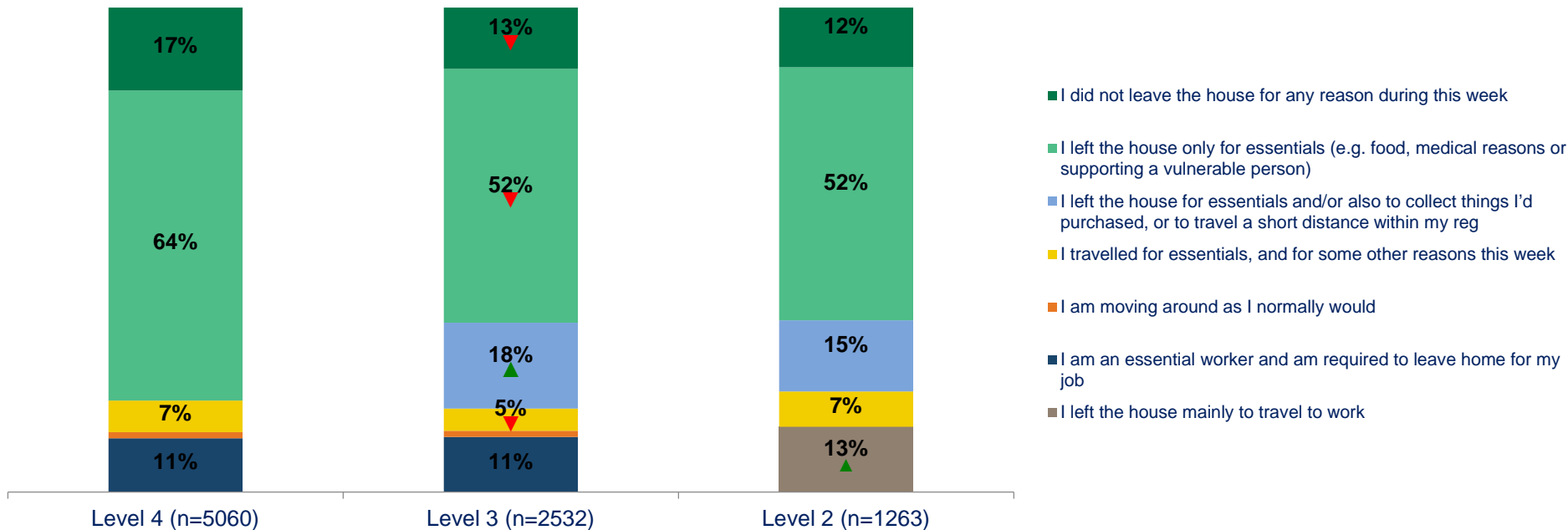
Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels the survey asks New Zealanders about their behaviour in the specific context of current self-isolation in relation to permitted movement and activity.
- Despite the countries move to level 2, there are still just over one in 10 New Zealanders who are completely self isolating.
- Half of New Zealanders are still adhering to lockdown conditions, travelling only for essentials, including grocery shopping and support trips.
- We've yet to see the full impact of level 2 conditions on work travel behaviours and anticipate that in wave 8, with level 2 conditions having run for more than a full week, we will see an upturn in both work, and non-essential travel.



Despite people travelling for work in level 2, the proportion still mostly staying home remains the same as in level 3, given restrictions only lifted for part of the week

Reported activity and movement during the past seven days by alert level, excludes exercise

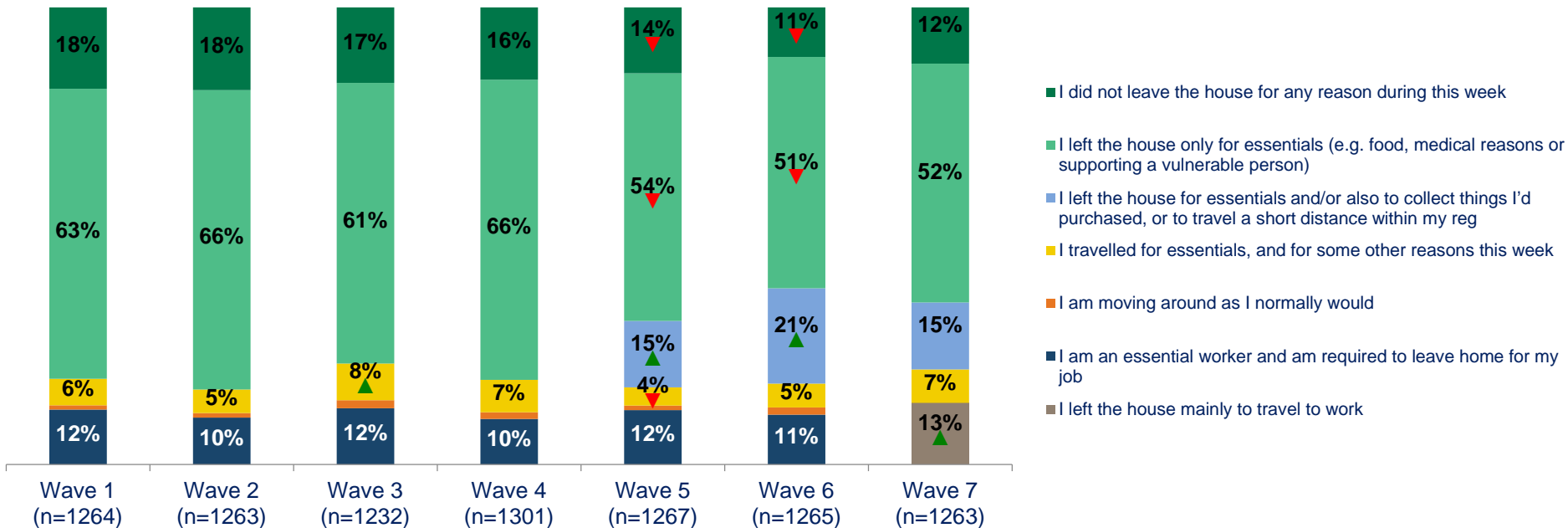


ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
 Base: all adults 15+ in New Zealand



Given that much of the preceding week was still under level 3 conditions, we are yet to fully see the impact of the switch to level 2

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



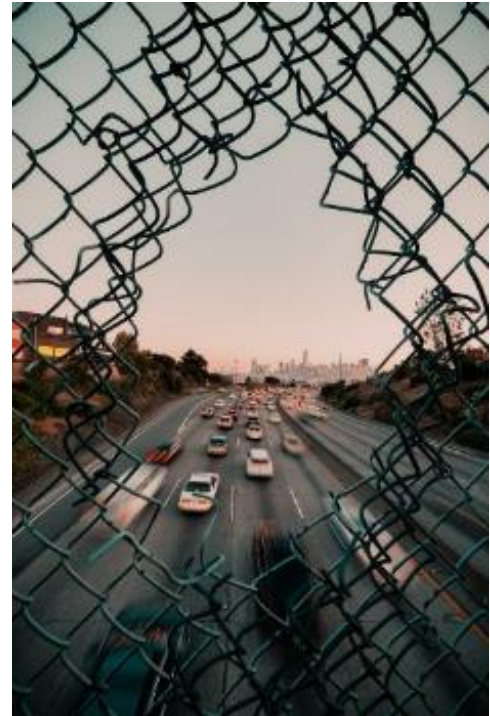


Section 4 – Local journeys and modes

Key findings – Local journeys and modes

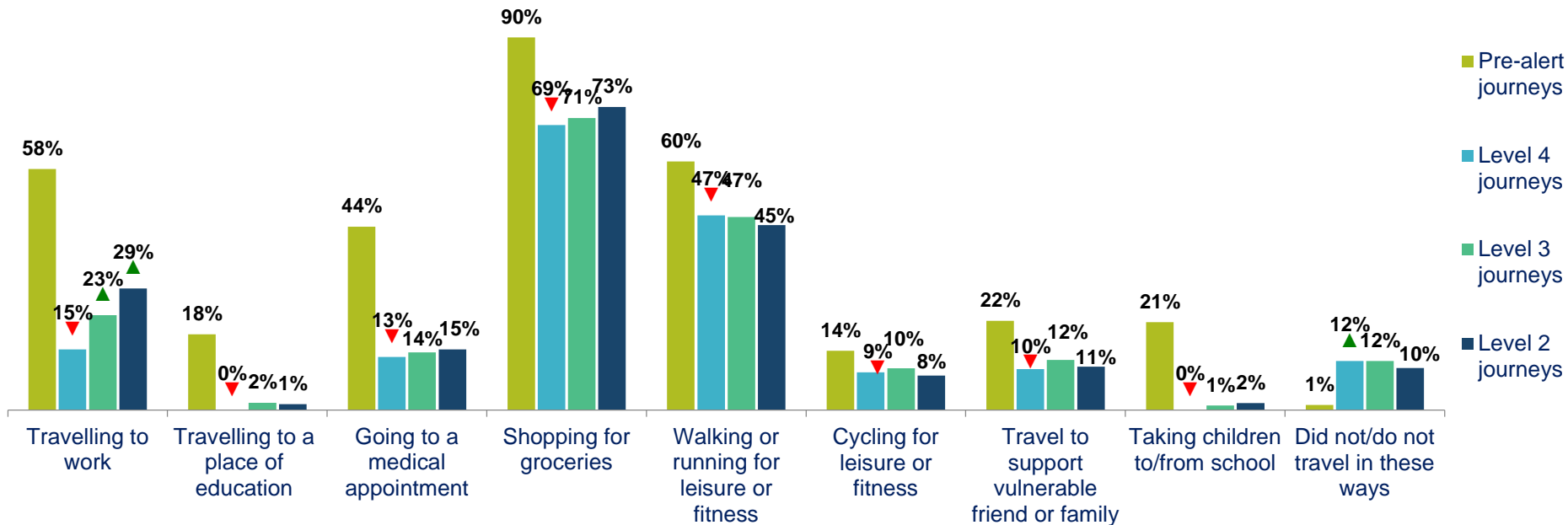
Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have been tracking both changes in journeys made and modes used.
- This section specifically focus on travel for local, essential journeys during this time.
- Of the local, essential journeys measured, only travel for work has seen a significant increase at the start level 2, this has been trending upwards steadily since the start of level 3.
- Public transport use has begun to recover this week, with all modes seeing a statistically significant increase on level 3 and a similar improvement in future consideration.
- However, there may be barriers to full return, as more are citing accessibility issues as reasons for not using public transport at this time.
- There has also been an increase in those saying that they will return to public transport when increased road traffic makes cycling or driving less attractive.



A continued increase in those travelling to work is the biggest shift as we enter level 2

Reported activity and movement during the past seven days by alert level



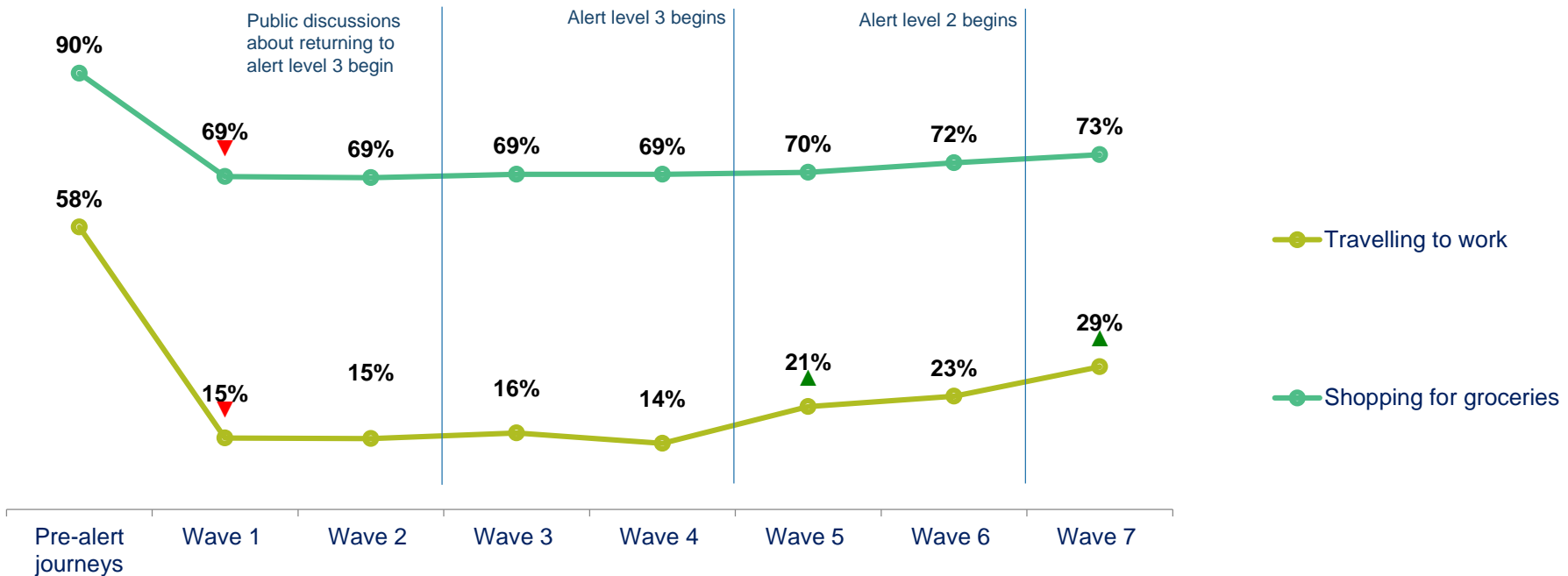
QJOURNEY1/QJOURNEY. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

Base: all adults 15+ in New Zealand in Benchmark wave (n=); Level 4 (n=5,060); Level 3 (n=2,532); Level 2 (n=1,263)



The proportion travelling to work remained stable in level 3, with a significant step change under level 2 conditions

Reported activity and movement during the past seven days by wave



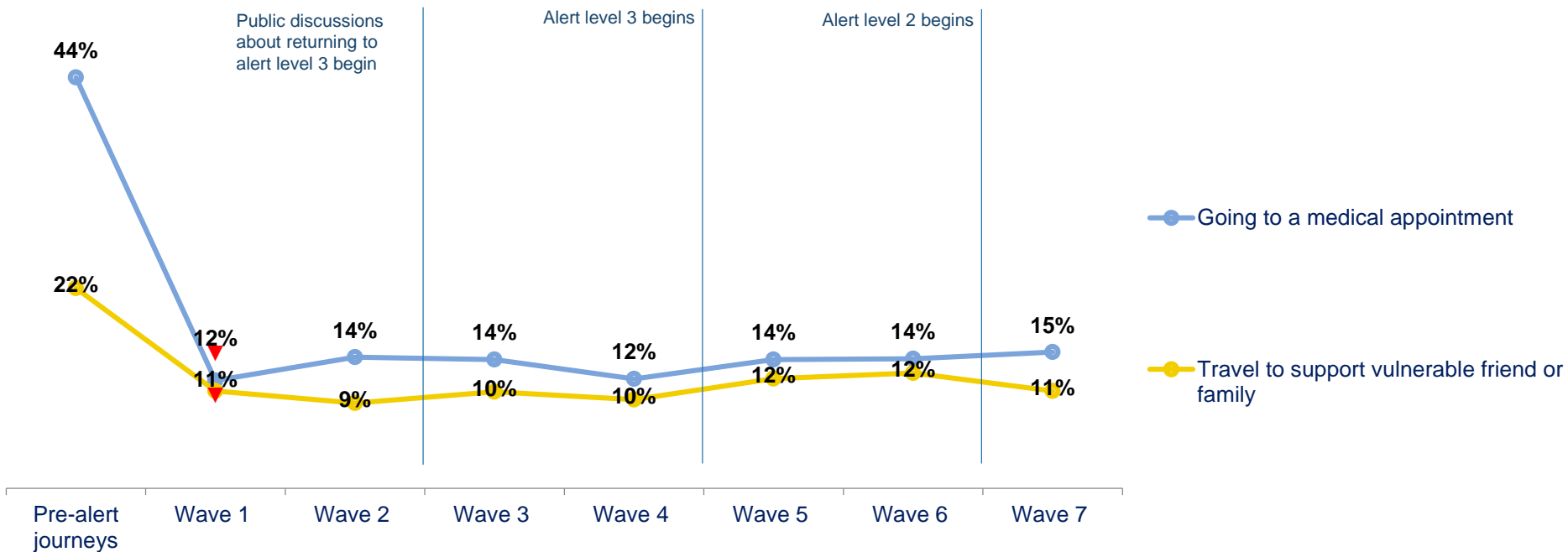
QJOURNEY1/QJOURNEY. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

Base: all adults 15+ in New Zealand Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263)



Medical appointments and support journeys have not seen the same increase in levels 3 and 2 that work has experienced

Reported activity and movement during the past seven days by wave



QJOURNEY1/QJOURNEY. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

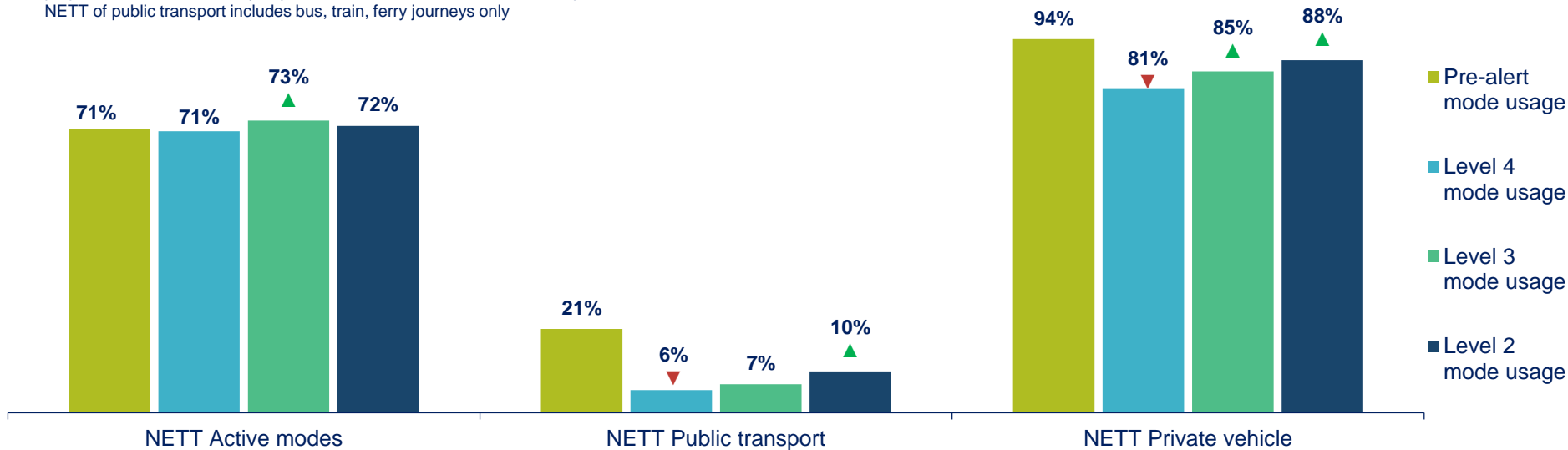
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Public transport usage has risen in level 2 to almost half the pre-lockdown level

Modes used in a normal week vs used in past week by alert level

NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.
NETT of public transport includes bus, train, ferry journeys only



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?

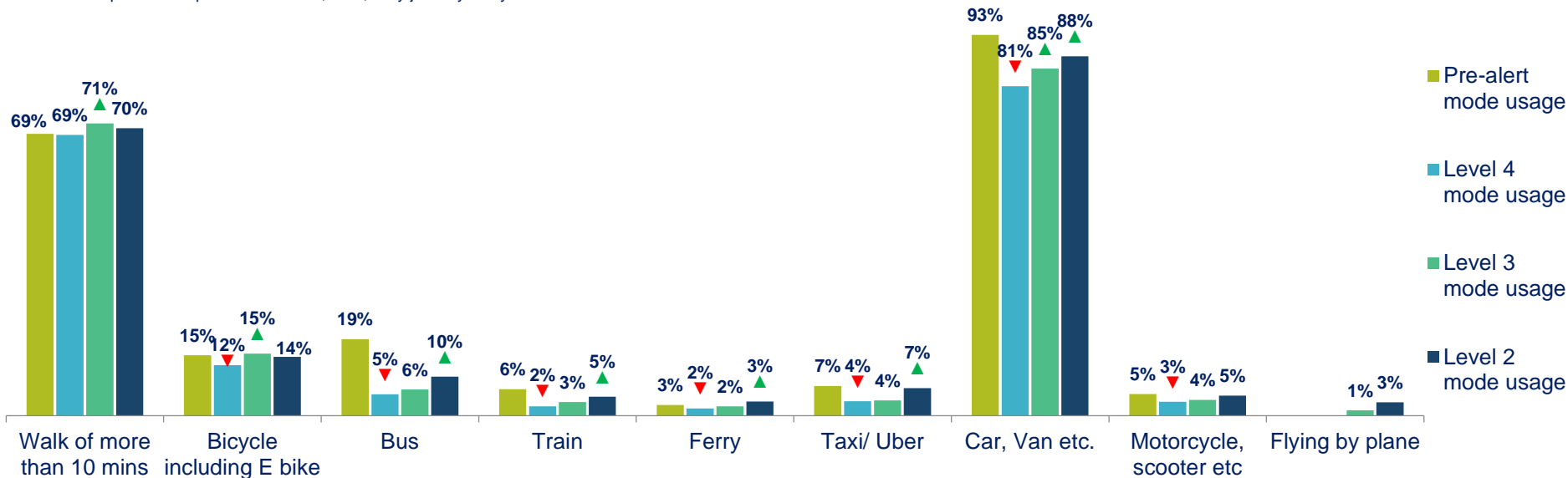
Base: all adults 15+ in New Zealand in Pre-alert level: (n=3,759); level 4 (n=5,060); level 3 (n=2,352); Level 2 (n=1,263)



At the granular level, almost all modes saw an increase in usage in level 2, with every public transport mode increasing reported usage

Modes used in a normal week vs used in past week by alert level

NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.
NETT of public transport includes bus, train, ferry journeys only



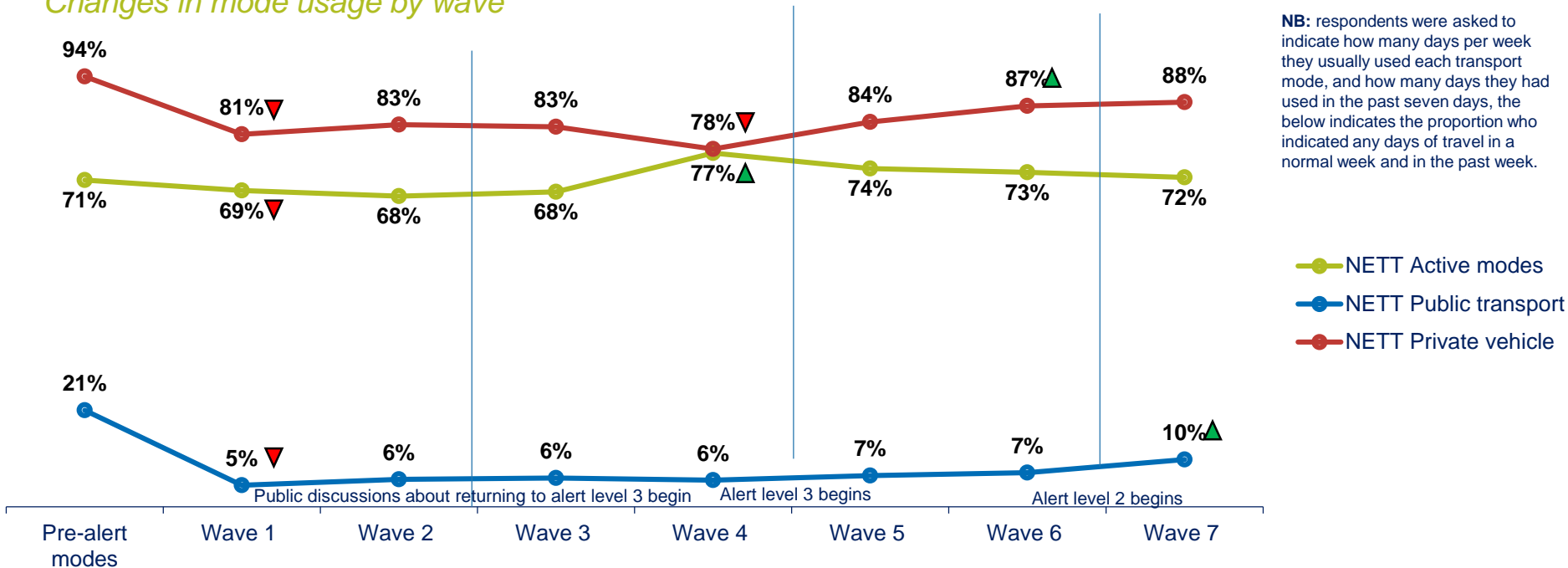
QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?

Base: all adults 15+ in New Zealand in Pre-alert level: (n=3,759); level 4 (n=5,060); level 3 (n=2,352); Level 2 (n=1,263)



During lockdown, active mode usage peaked at six points above normal usage, but the gap between this and private vehicle usage is beginning to grow again

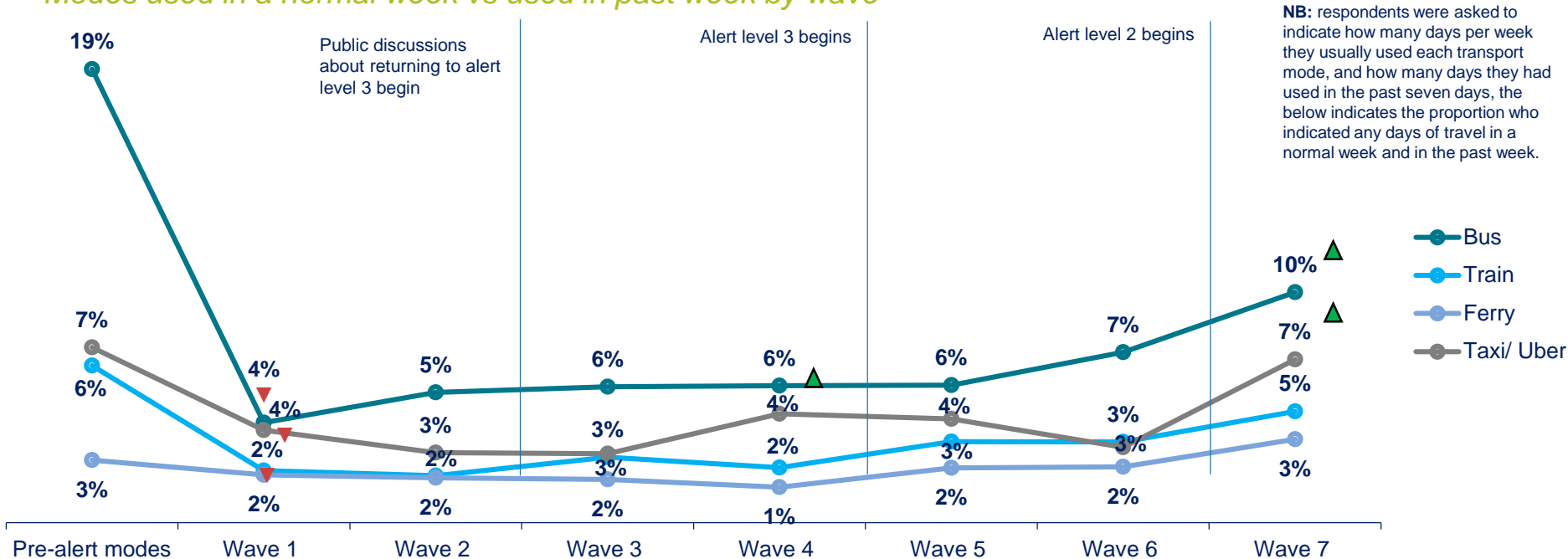
Changes in mode usage by wave



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 (e.g. 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 in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263)

Whilst increased bus usage has been significant, the proportion using taxis and Ubers at least once during the week is now at pre-lockdown levels

Modes used in a normal week vs used in past week 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 (e.g. 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 in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263)

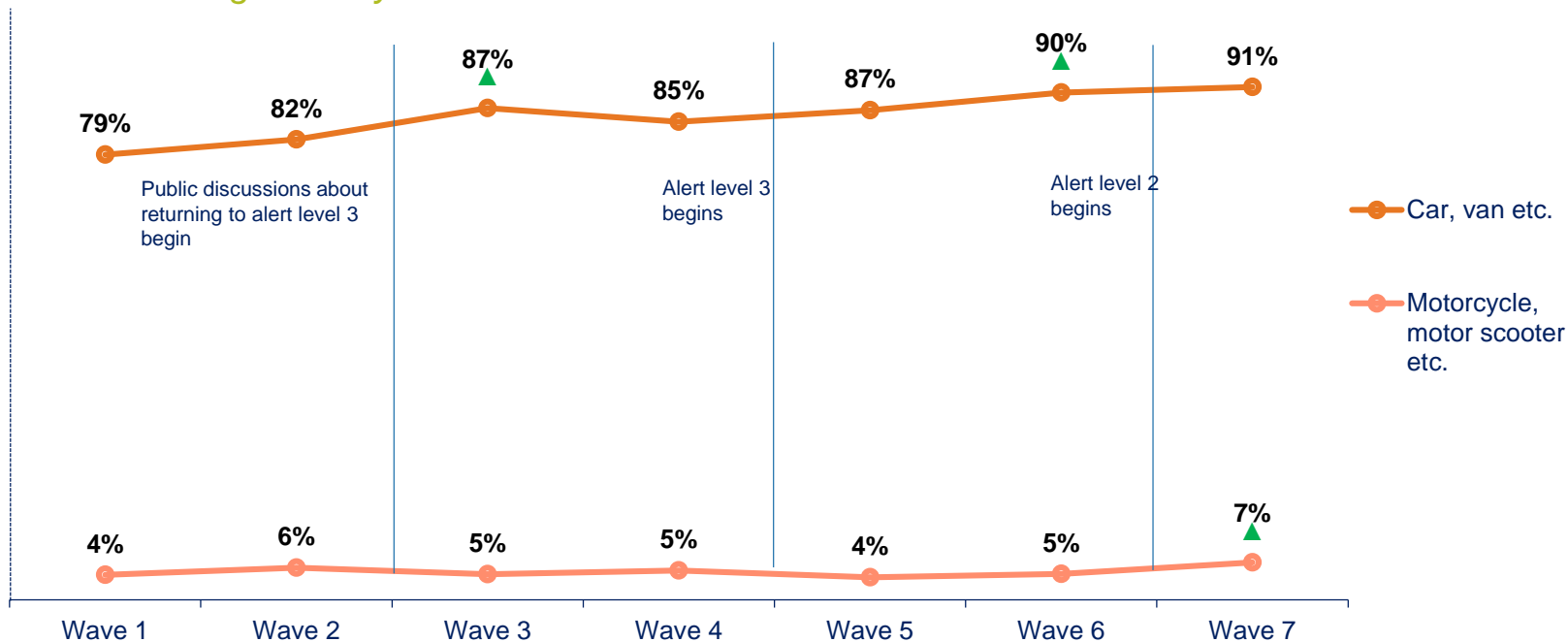
Consideration of private vehicles has been climbing steadily since alert level 3, tracking a point or two above actual reported usage each wave

Mode consideration: coming week by wave

Pre-alert usage

Car ●
(93%)

Motorcycle ●
(5%)



QPT2. If available next week, which if any of the following would you be likely to use?

Base: all adults 15+ in New Zealand who normally travel;



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Consideration of all public transport modes has increased significantly at the beginning of alert level 2, with taxi consideration now above pre-lockdown usage

Mode consideration: coming week by wave

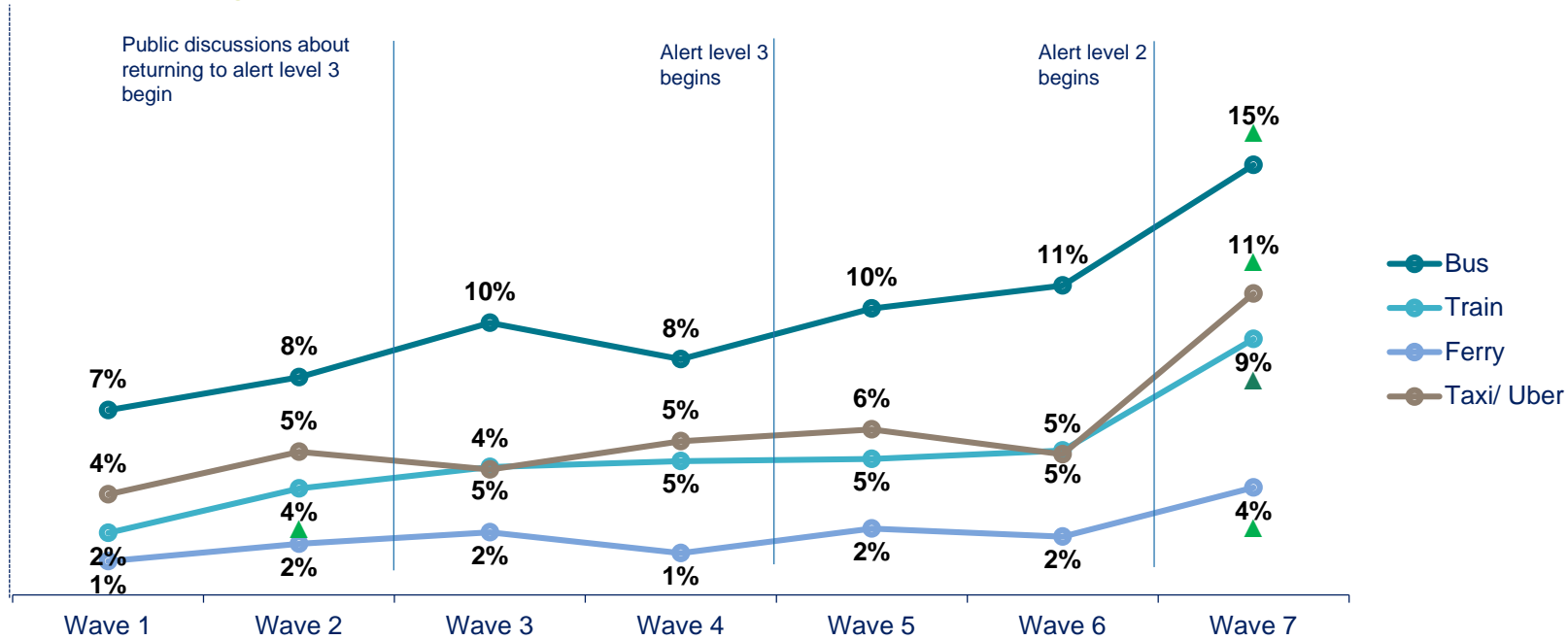
Pre-alert usage

Bus ● (19%)

Taxi/Uber ● (7%)

● Train (6%)

Ferry ● (3%)



QPT2. If available next week, which if any of the following would you be likely to use?

Base: all adults 15+ in New Zealand who normally travel;



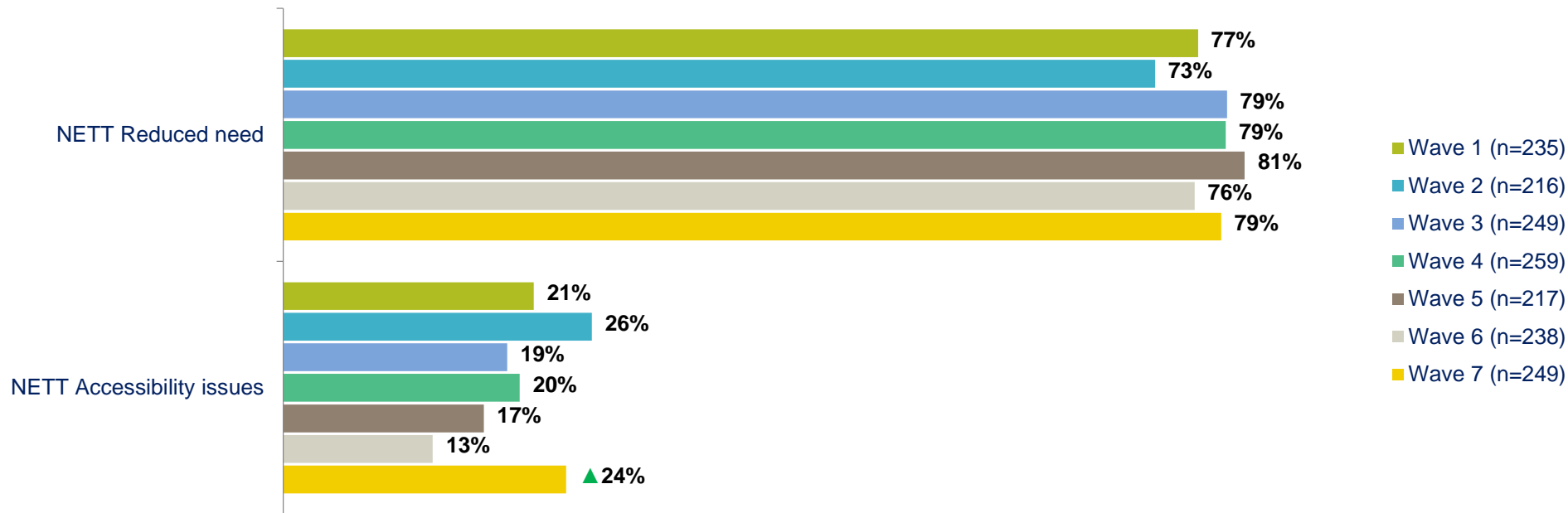
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Following a decline during level 3, there has been a significant increase in the proportion citing accessibility issues as reasons for reducing public transport usage

Reasons for reduced reported public transport usage in past seven days



QDEC. Reasons for decrease in PT activity - For which, if any of the following reasons, has your use of public transport decreased?

Base: all decreasing PT usage in past week



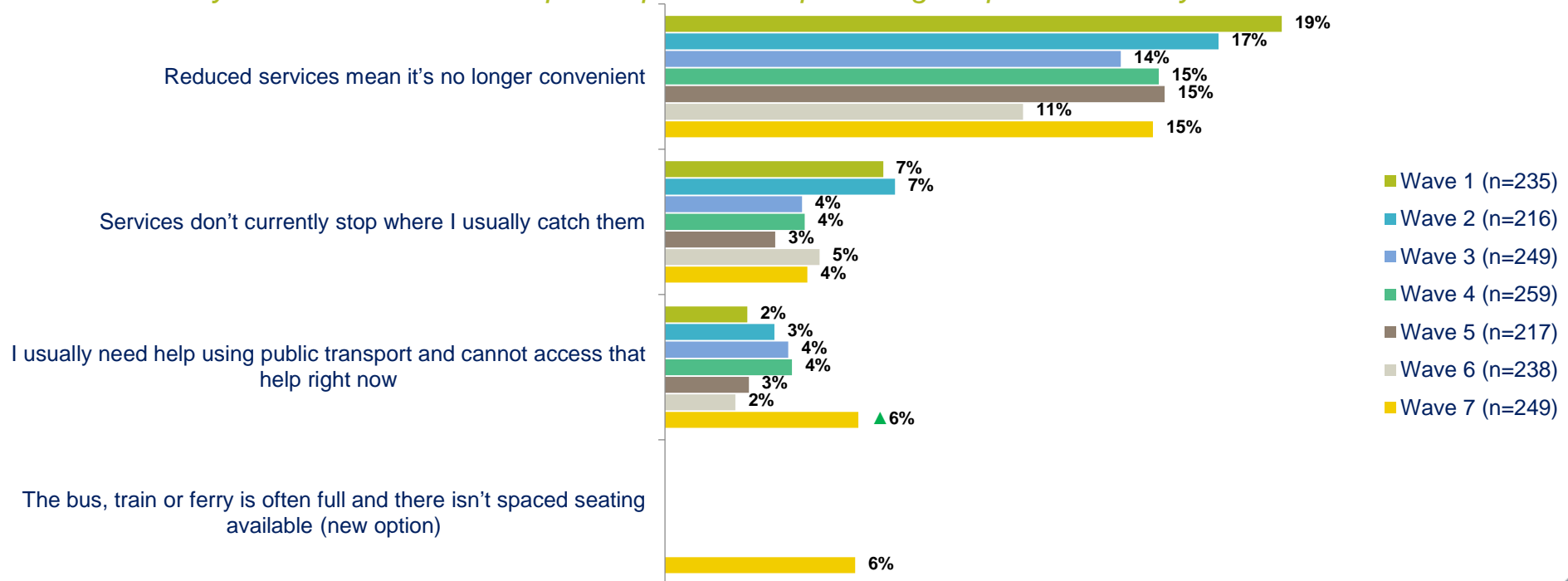
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

At the granular level, there were directional increases in those citing reduced services, as well as a significant upturn in those needing help that isn't accessible

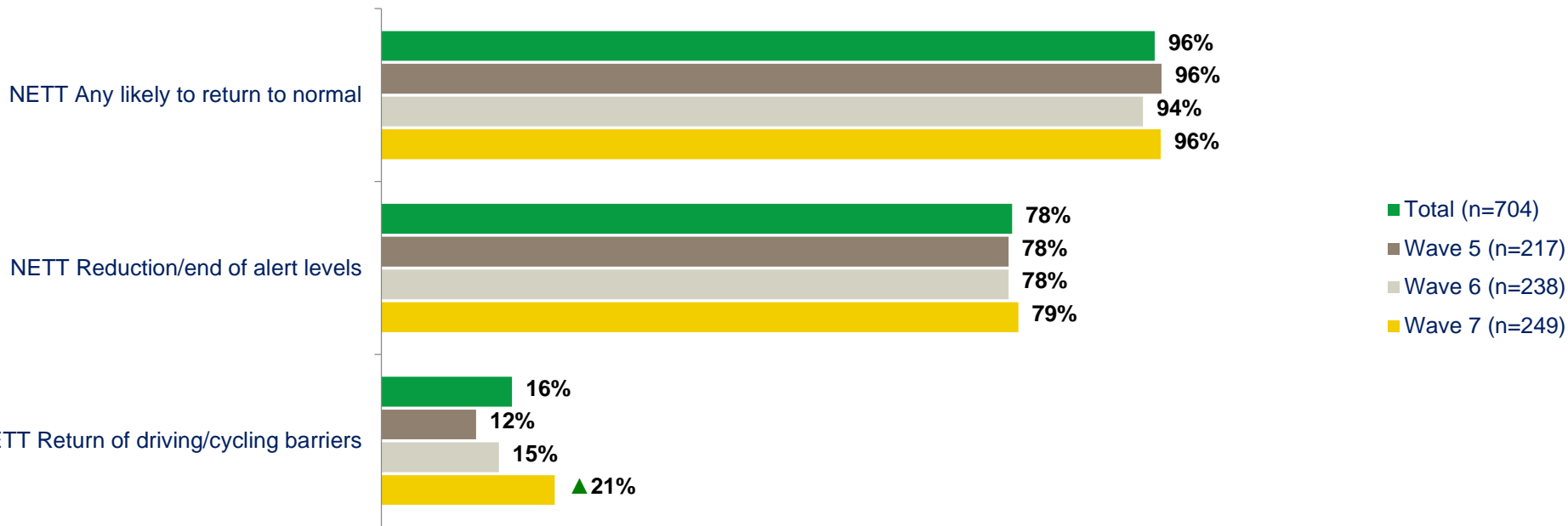
Accessibility reasons for reduced reported public transport usage in past seven days



QDEC. Reasons for decrease in PT activity - For which, if any of the following reasons, has your use of public transport decreased?
 Base: all decreasing PT usage in past week

There has been an increase in people citing reasons like increased traffic or unsafe roads for cycling as a key trigger for returning to public transport

Triggers for return to Public Transport

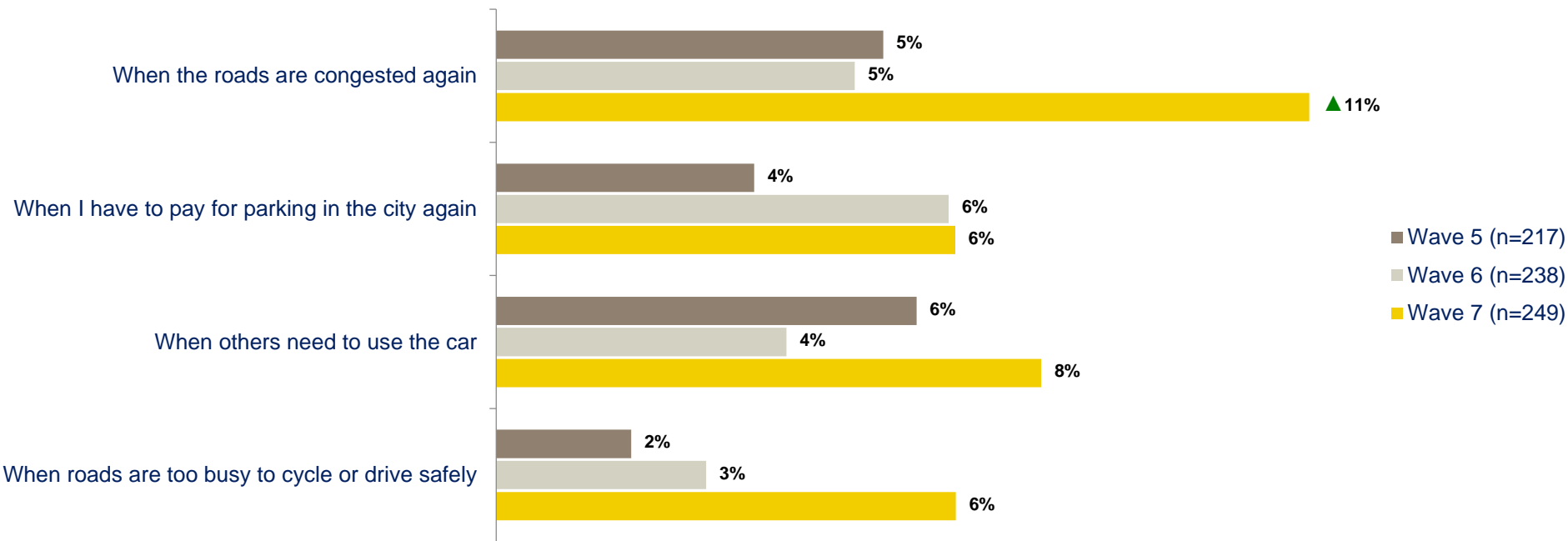


QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?
Base: all in wave 5 decreasing PT usage in past week



The big driver in this increase is the proportion saying they will switch to public transport when congestion returns, although all barriers-related reasons have grown

Triggers for return to public transport related to the return of driving cycling barriers



QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?
Base: all in wave 5 decreasing PT usage in past week





Section 5 – Domestic journeys and modes

Key findings – domestic journeys and modes

Waka Kotahi objective – how is domestic travel changing?

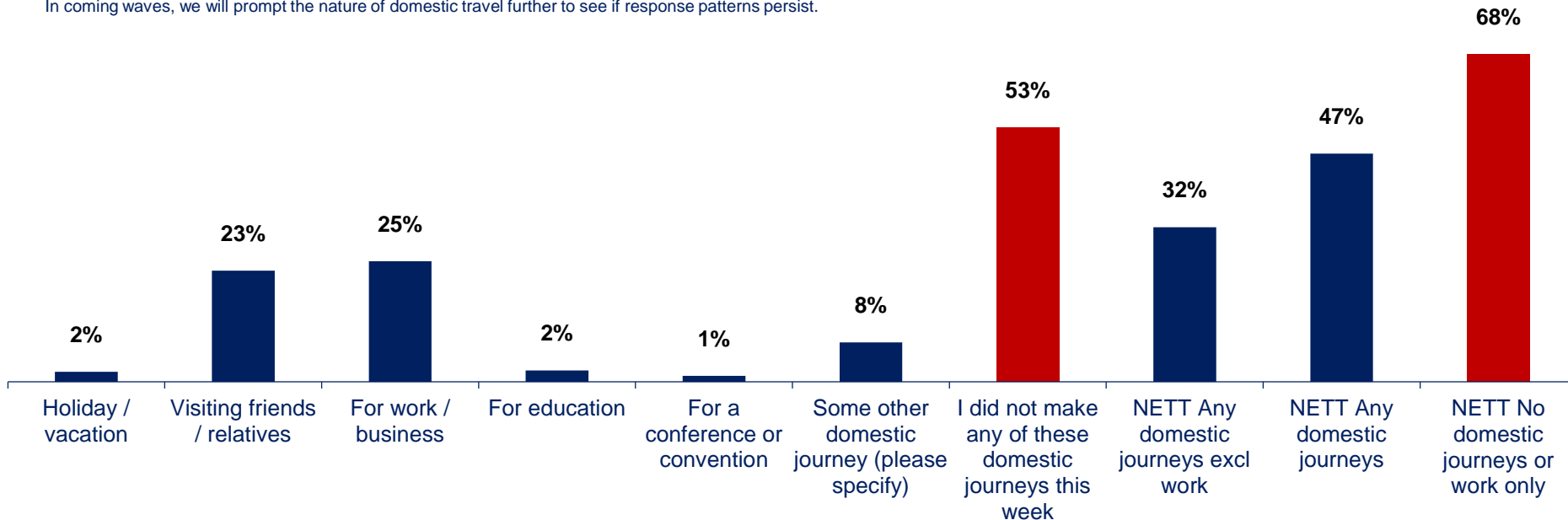
- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have begun to measure how domestic inter-regional travel is being taken up in level 2.
- Longer domestic journeys have only just become feasible under level 2 conditions, with only trips to visit friends and relatives and work/business trips being undertaken during this time.
- So far, private vehicles are favoured as a mode for these trips, with minimal use of mass transit options.
- Generally, inter-regional travel is consistent across the country, but in Wellington, a statistically smaller proportion are travelling.



In the first days of level 2, people have taken advantage of inter-regional travel to visit friends and relatives living further away

Domestic journeys in the past seven days

NB: Some reporting work travel may be including normal commutes within their answers and as such, we have also presented NETTs of non-travel that include work journeys. In coming waves, we will prompt the nature of domestic travel further to see if response patterns persist.

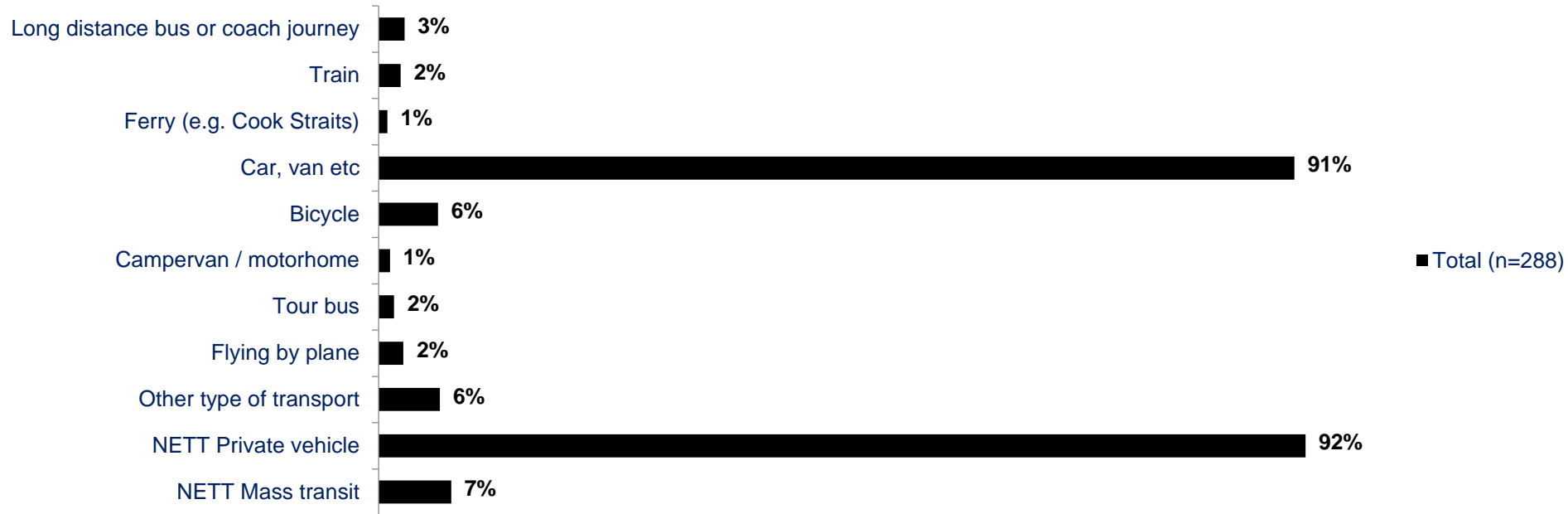


QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand (n=1,263)

Car journeys have been the dominant mode for visiting friends and family inter-regionally

Domestic journeys in the past seven days by mode – visiting friends / relatives

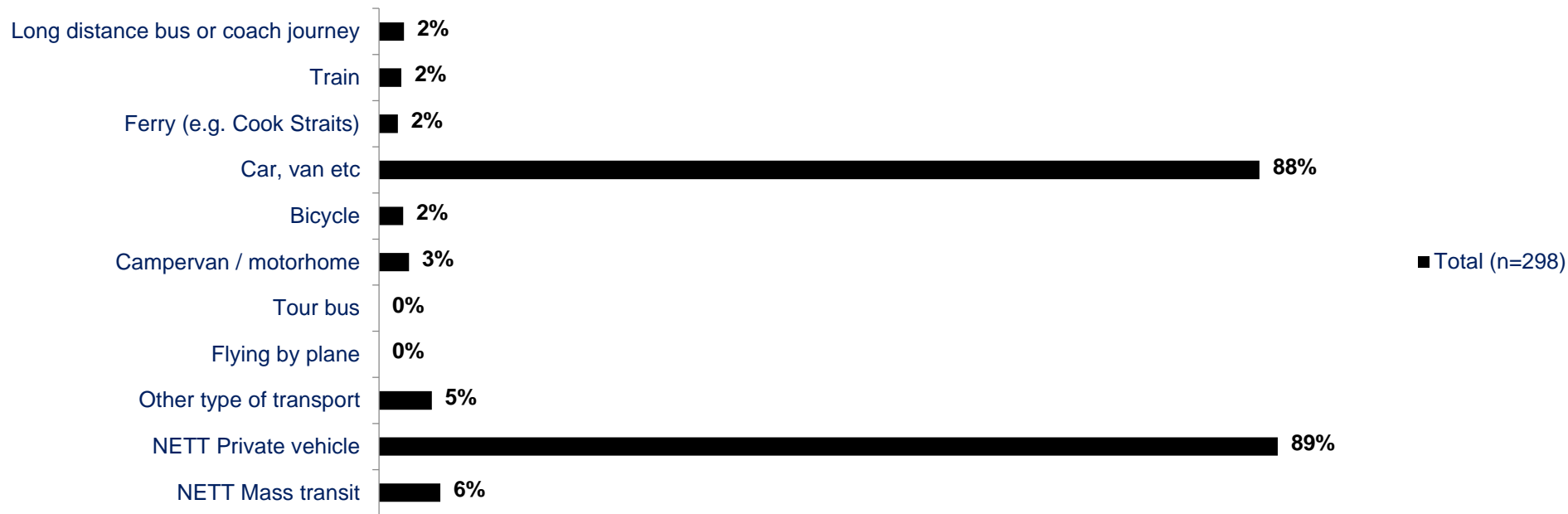


QMODE4. How did you make each of the domestic journeys listed below during the last 7 days?

Base: all adults 15+ in New Zealand who have travelled domestically in the past 7 days

Private modes also dominate for inter-regional work or business journeys

Domestic journeys in the past seven days by mode – work / business trip

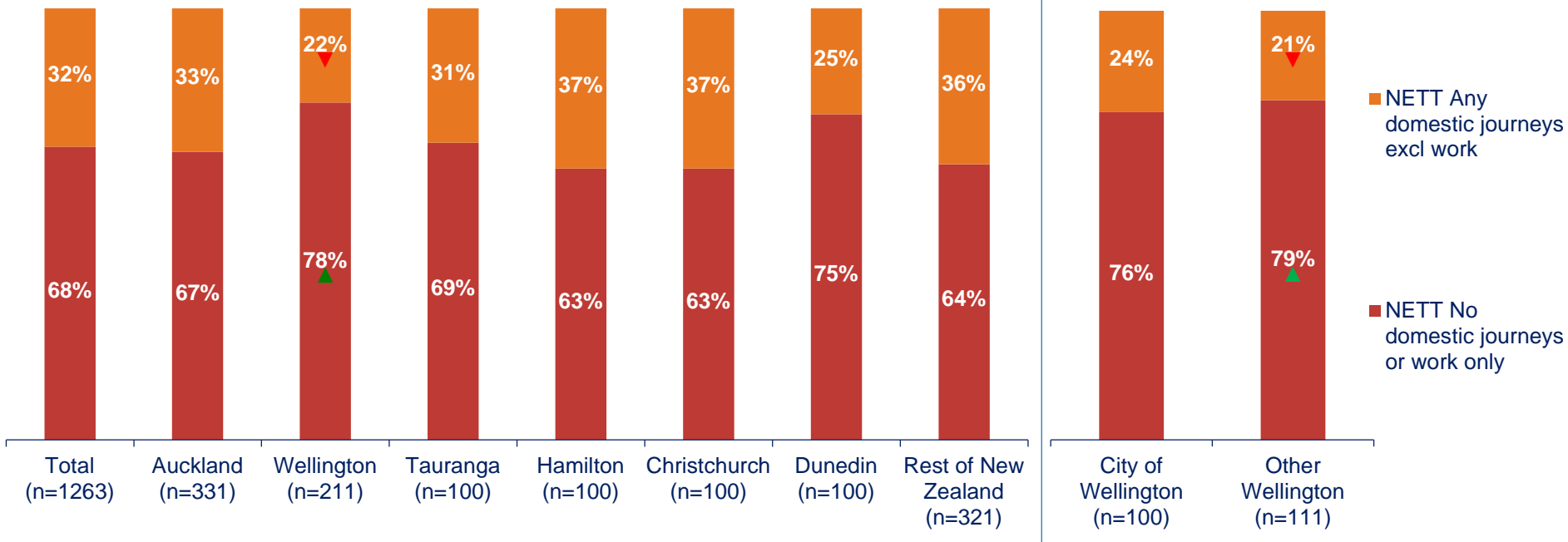


QMODE4. How did you make each of the domestic journeys listed below during the last 7 days?

Base: all adults 15+ in New Zealand who have travelled domestically in the past 7 days

Levels of inter-regional travel have been largely consistent across New Zealand, with the notable exception of the greater Wellington area

Domestic journeys in the past seven days by region



QJOURNEY4. Which, if any of the following types of journeys did you make during the last seven days?
 Base: all adults 15+ in New Zealand





Section 6 – Future domestic tourism

Key findings – future domestic tourism

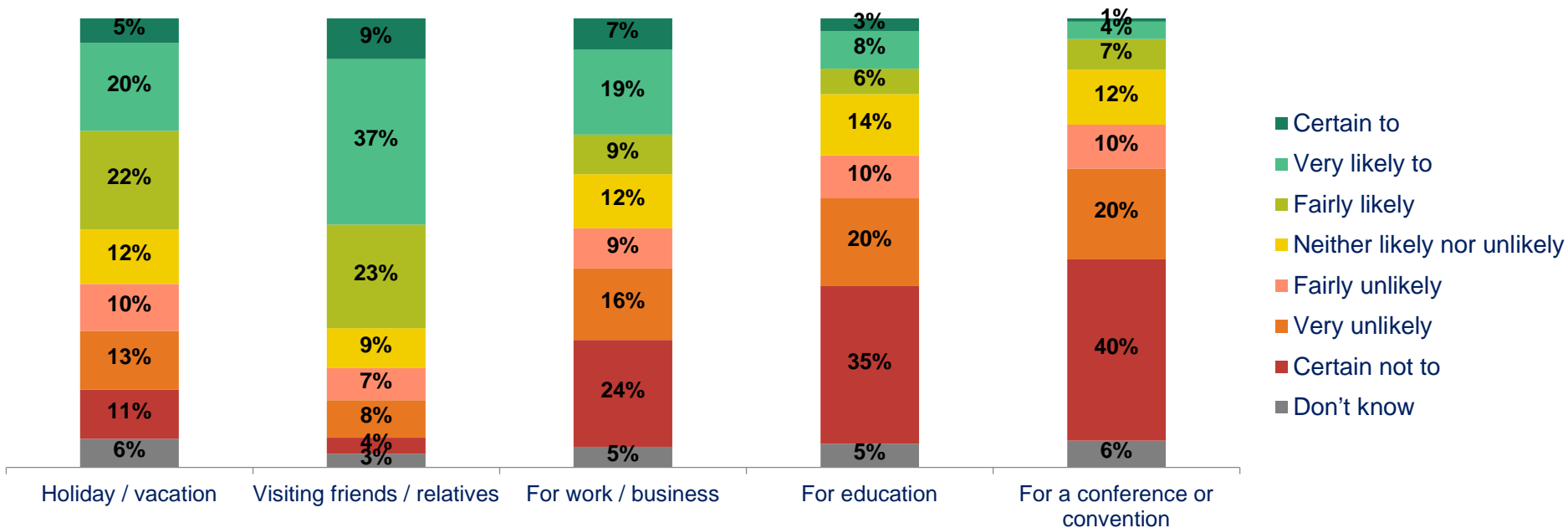
Waka Kotahi objective – how will domestic tourism change going forward?

- In light of restricted international travel, it is important to understand how domestic travel and tourism may change and impact New Zealand's travel infrastructure.
- Visiting friends and family is the big driver for inter-regional travel in the medium-term future, with 69% saying they are likely to travel for this reason and more than half citing it as a reason for increasing their travel overall.
- Whilst people are confident that they will travel domestically in the next six months, this doesn't translate into an anticipated increase in the volume of travel, more a reversion to the levels of travel they had before.
- In fact, taking into account those who feel they will travel less, the overall impact for most travel types is a net decrease during the coming half year.
- Affordability and concerns of COVID-19 transmission are the big barriers to travelling domestically going forward, whilst a desire to see friends and family is the biggest single driver of travelling more.



Nearly half expect to undertake domestic holidays during the next six months, with visits to friends and relatives more likely to be in people's travel plans

Likelihood to make domestic journeys

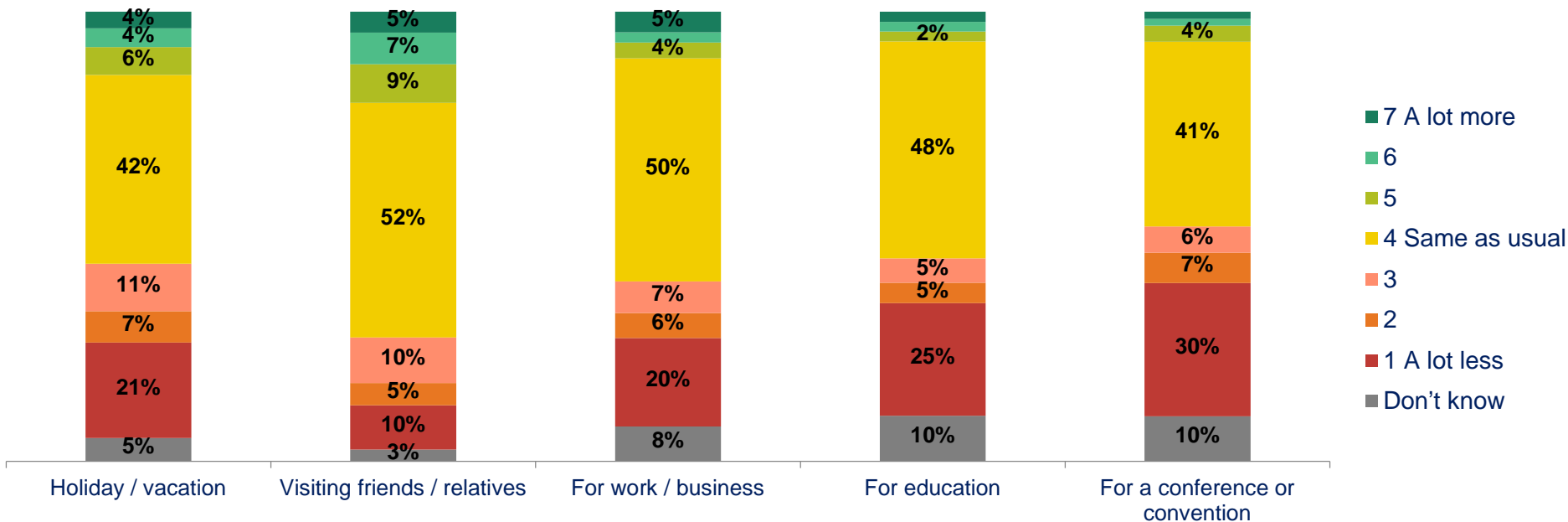


FDT1. How likely are you to make following types of domestic journeys in the next six months?

Base: all adults 15+ in New Zealand, Base: (n=1,263)

While many anticipate that they will travel domestically for holidays and visits, this doesn't necessarily translate to an increase, with a net decrease projected overall

Intention to travel domestically

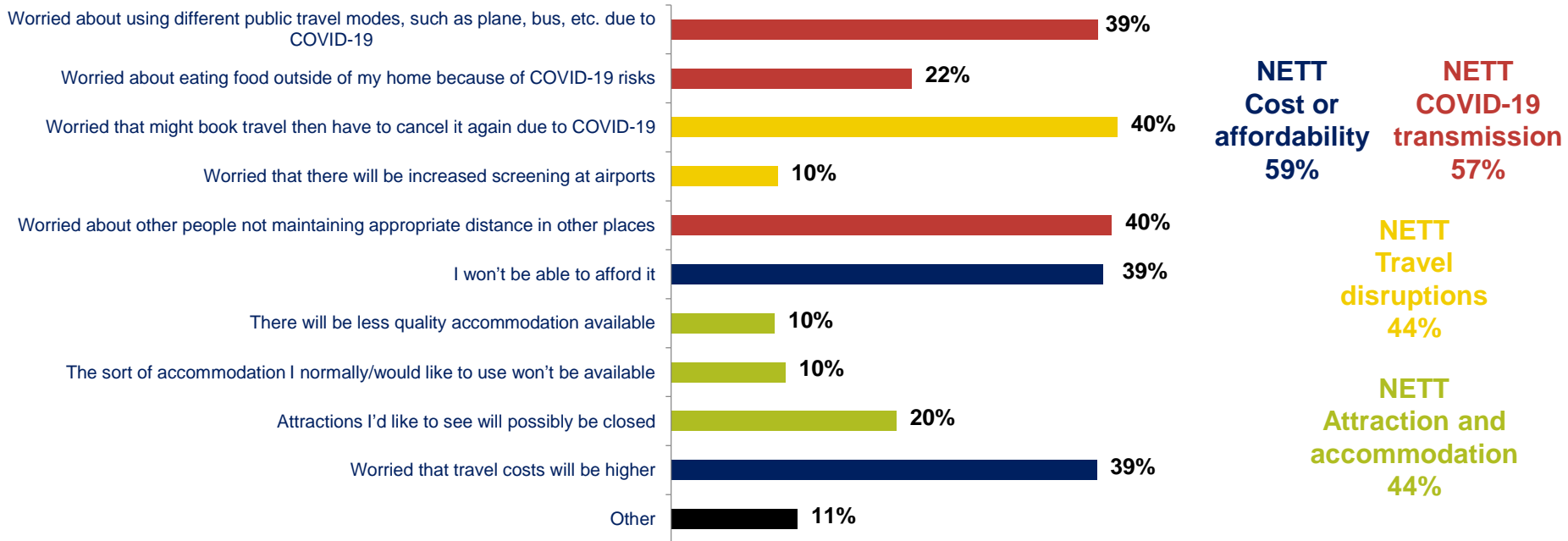


FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand, Base: (n=1,263)

Cost and affordability and fears about COVID-19 transmissions are the leading reasons cited by people that anticipate decreased travel

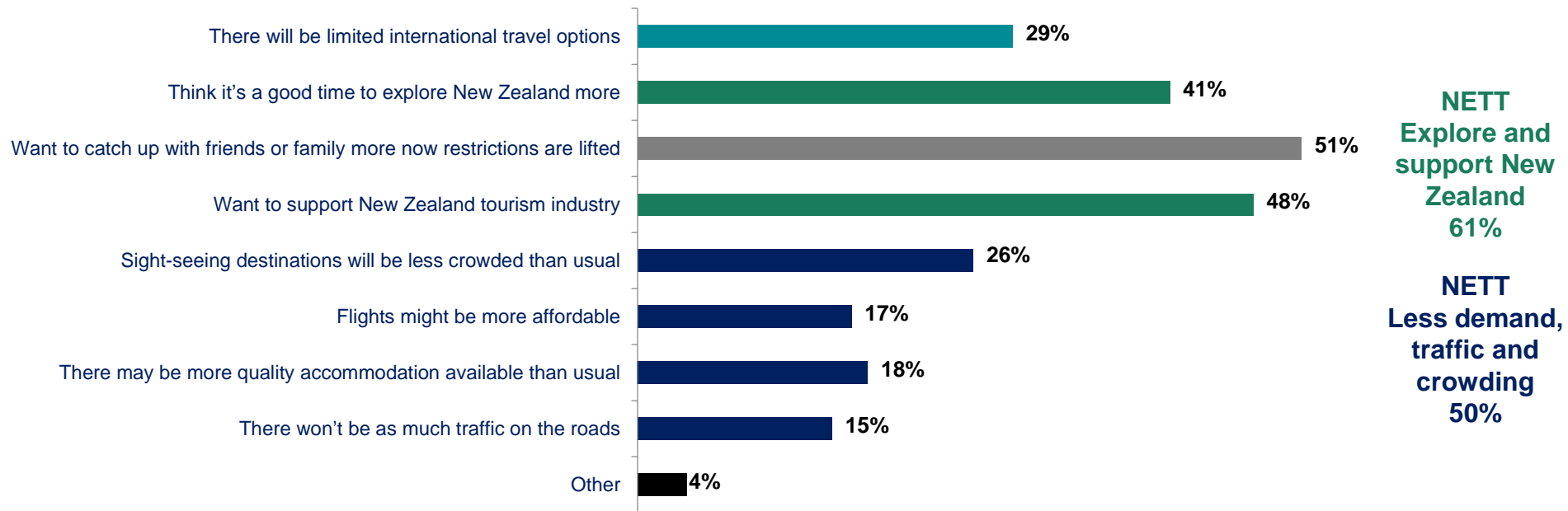
Reasons for travelling less



FDT3a. What are the main reasons that you intend to travel less?
 Base: all adults 15+ in New Zealand intending to travel less (n=789)

The leading individual reason for travel is visiting friends and family, with exploring and supporting New Zealand the biggest motivation for increasing domestic travel

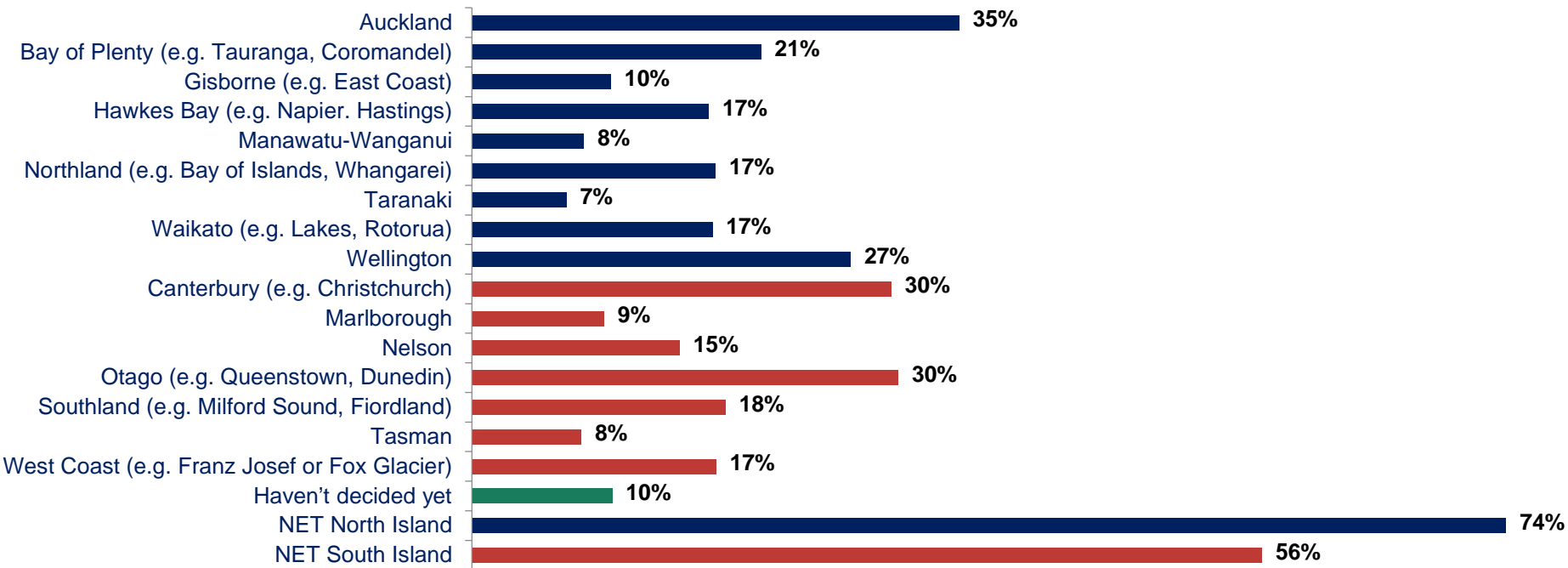
Reasons for travelling more



FDT3b. What are the main reasons that you intend to travel more?
Base: all adults 15+ in New Zealand intending to travel more (n=368)

North Island destinations are more likely to be in people's medium term plans, but it will be interesting to see how this changes once air travel becomes more normalised

Destination intend on travelling to



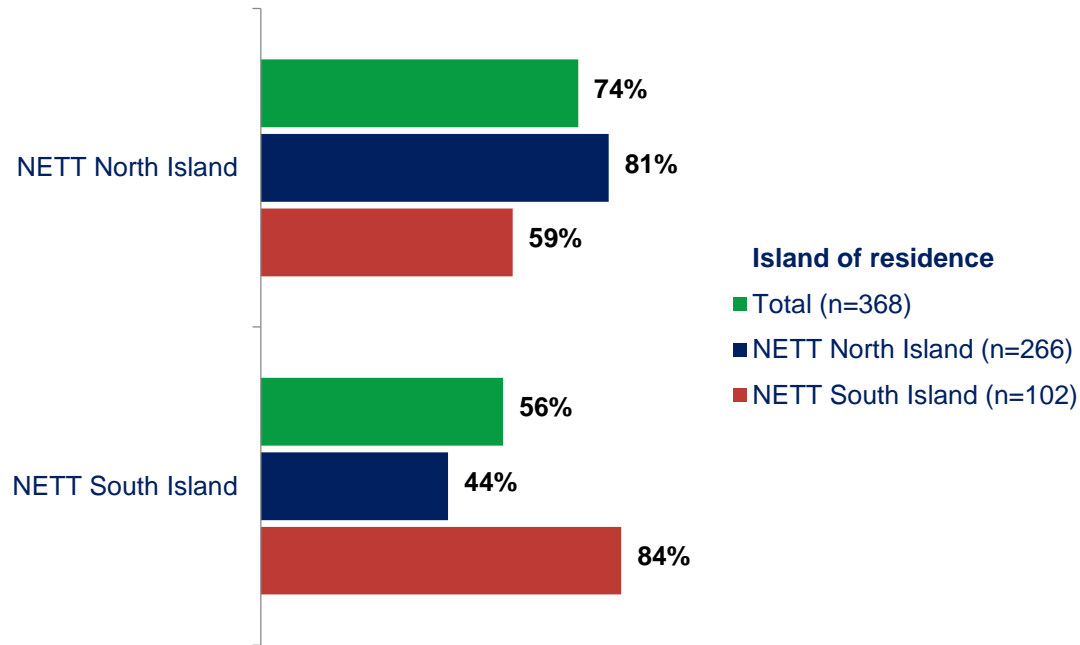
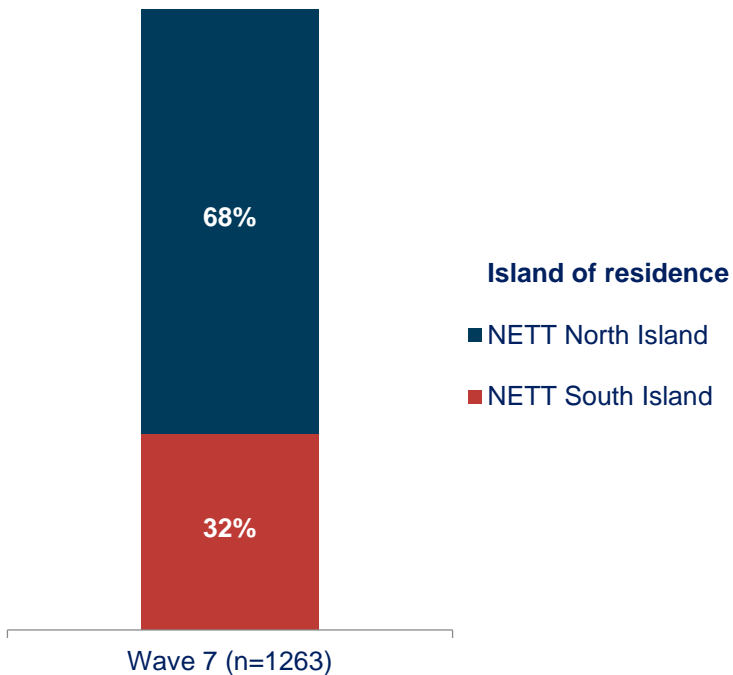
FDT4. Where do you think you will travel within New Zealand?

Base: all adults 15+ in New Zealand intending to travel more (n=368)

Most plan to travel within their own island, at least in the medium term, although 3 in 5 South Islanders intend to visit their North Island neighbours

Wave 7 sample distribution by Island

Destination intend on travelling to by Island of origin



FDT4. Where do you think you will travel within New Zealand?
Base: all adults 15+ in New Zealand intending to travel more (n=368)



Section 7 – Access to commerce

Key findings – access to commerce

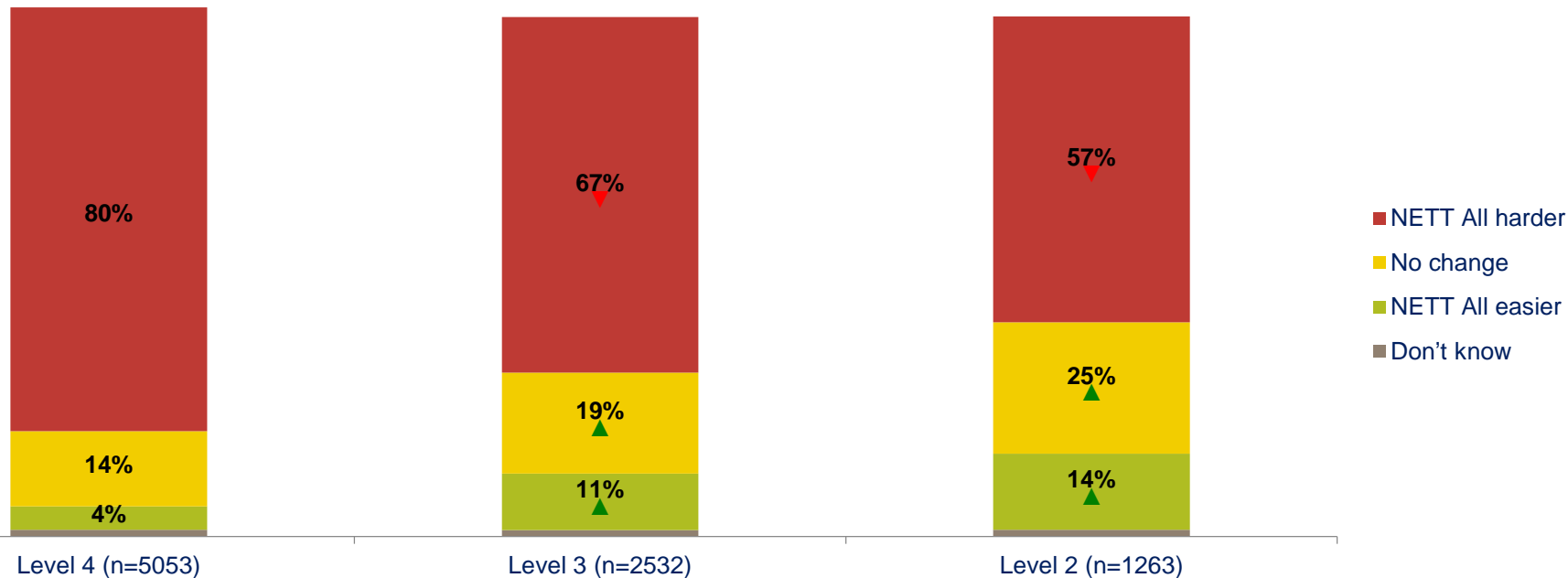
Waka Kotahi objective – how is travel changing?

- In order to understand the potential long term effects of changing travel behaviour we want to understand the ways in which New Zealanders are adapting to their circumstances and accessing the things they need and want.
- In general the shopping experience is becoming more bearable to New Zealanders. At the start of level 2, a quarter say it is no different to what it was pre-lockdown.
- Whilst level 3 restrictions permitted “click and collect” services to open up for many businesses as well as home delivery, there hasn’t been a marked change in take-up for this activity during this time, nor has there been a marked decrease as stores open up in level 2.



In each level the proportion finding shopping harder than normal has decreased, with a quarter now saying it is no different than before

Relative difficulty of shopping in past week by alert level



QSH2A. Shopping ease percentages - To what extent has shopping for the groceries and household essentials that you need been easier or harder during the past week than it was prior to any public health alert or lock down?

Base: all adults 15+ in New Zealand



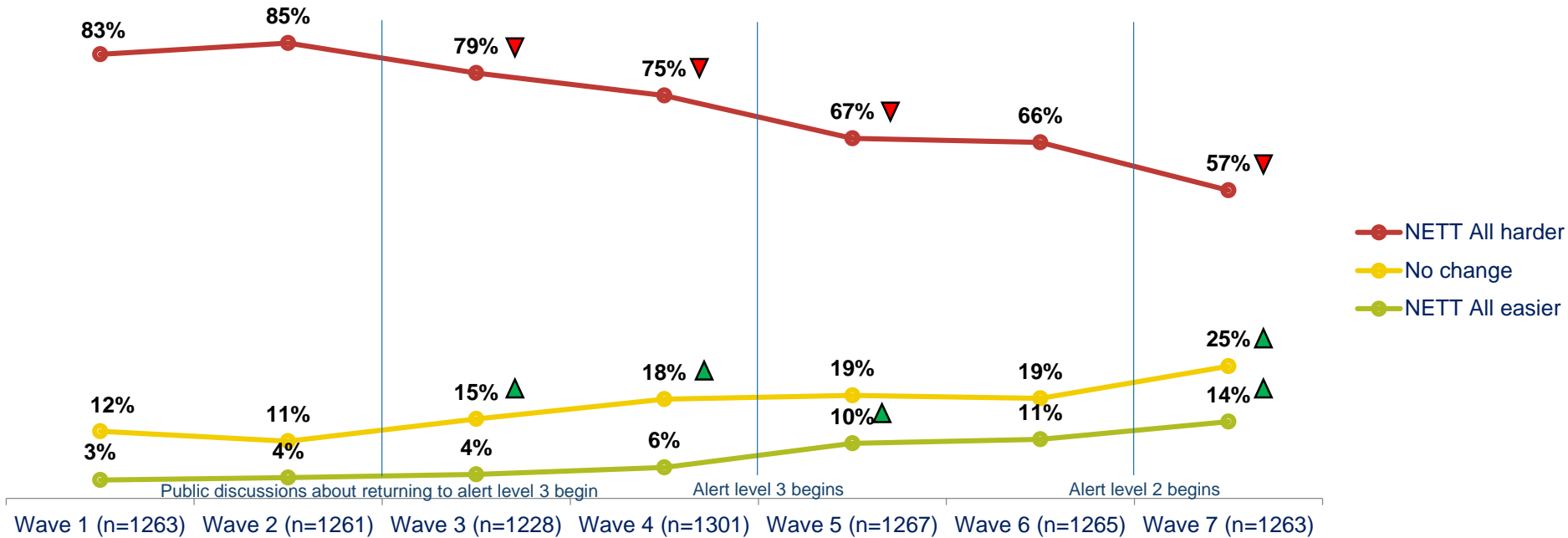
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The decrease in shopping challenges has been consistent ever since discussions about returning to level 3 began in the public domain

Relative difficulty of shopping in past week by survey wave



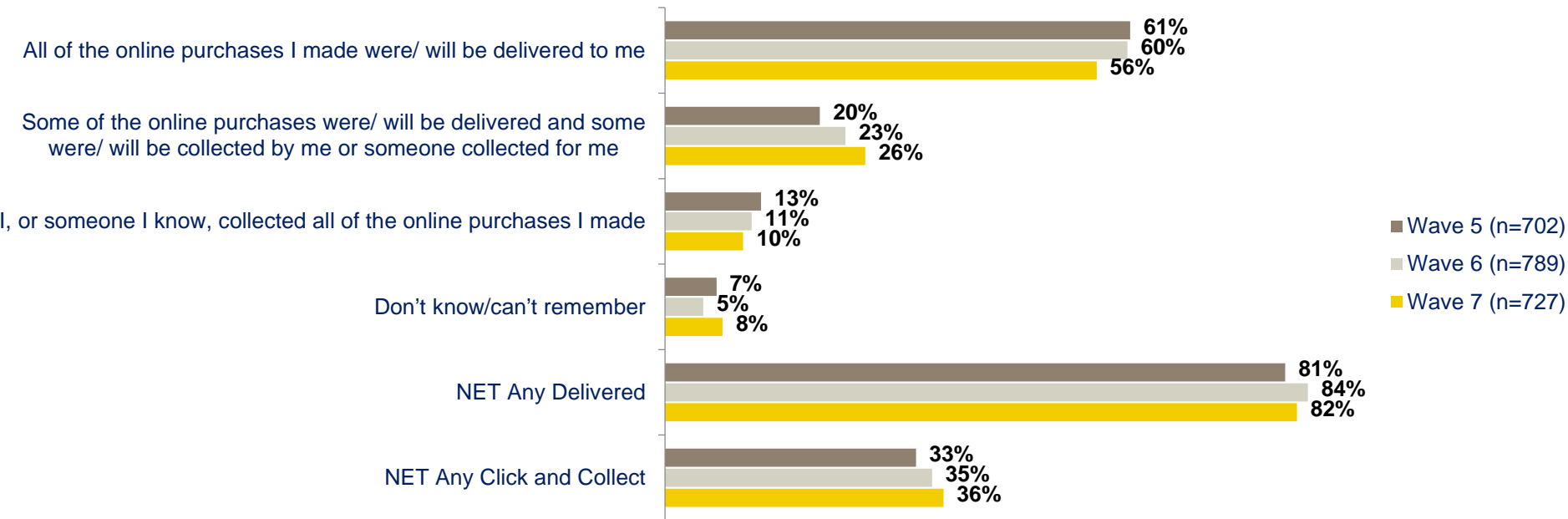
QSH2A. Shopping ease percentages - To what extent has shopping for the groceries and household essentials that you need been easier or harder during the past week than it was prior to any public health alert or lock down?

Base: all adults 15+ in New Zealand



There has been no significant change in the way that online orders are collected or delivered throughout level 3 or at the start of level 2

“Click and collect” or delivery



QSH4. And which of the following applies to the online grocery shop that you ordered this week? / And which of the following applies to the online purchases that you made this week?

Base: all adults 15+ in New Zealand online shopping online for groceries or other items



Section 8 – Returning to school

Key findings – returning to school

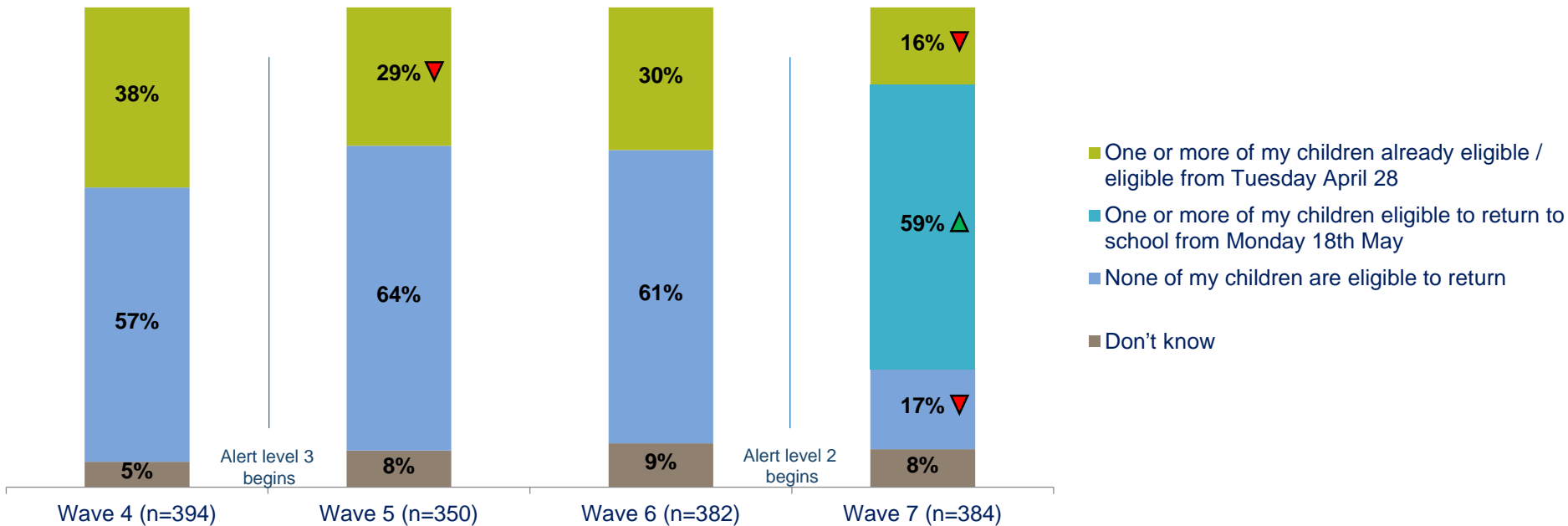
Waka Kotahi objective – how is travel changing?

- On 18 May, following the switch to alert level 2, all children were permitted to return to school or pre-school across New Zealand. It is important to understand how the intention to return is likely to impact daily traffic on our roads and rails.
- With this change, the majority of parents report that their children are eligible to return for the first time.
- Almost half of these parents say that their children have already returned, or will have done so on May 18.
- However, a sizable minority are hesitant about sending their children back, so the impact on transport infrastructure may not be equivalent to pre-lockdown levels.



For the first time, the majority of parents say that they have children who are eligible to return to school

Children eligible to return to school



NB: official eligibility during level 3 is for children of essential workers.

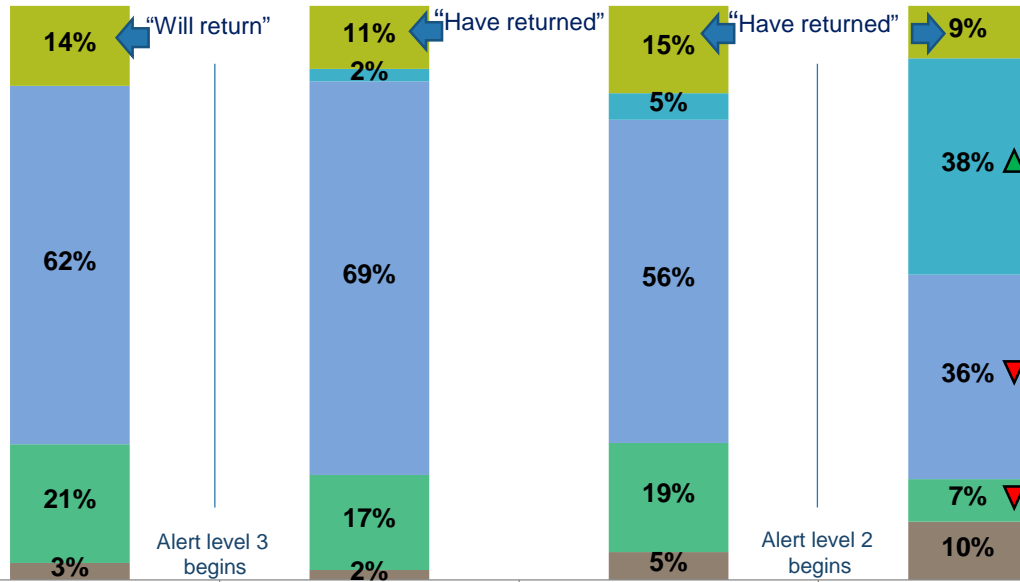
QHH1A. You said that you have children living at home with you. Which, if any of the following applies to you? QHH1B. And which, if any, of the following applies to you?

Base: those with children living at home



Almost half of parents say their children have returned, or will have returned on Monday 18 May

Intending / have returned children to school



- At least one of my children (Level 4 "has returned", Level 3/2 "will return") to school or pre-school this week
- At least one of my children will return to school or pre-school this week, but they have not done so yet
- I will wait a little longer before allowing my children to return to school or pre-school
- I am not sure yet when I will allow my children to return to school or pre-school
- Prefer not to say

NB: official eligibility during level 3 is for children of essential workers.

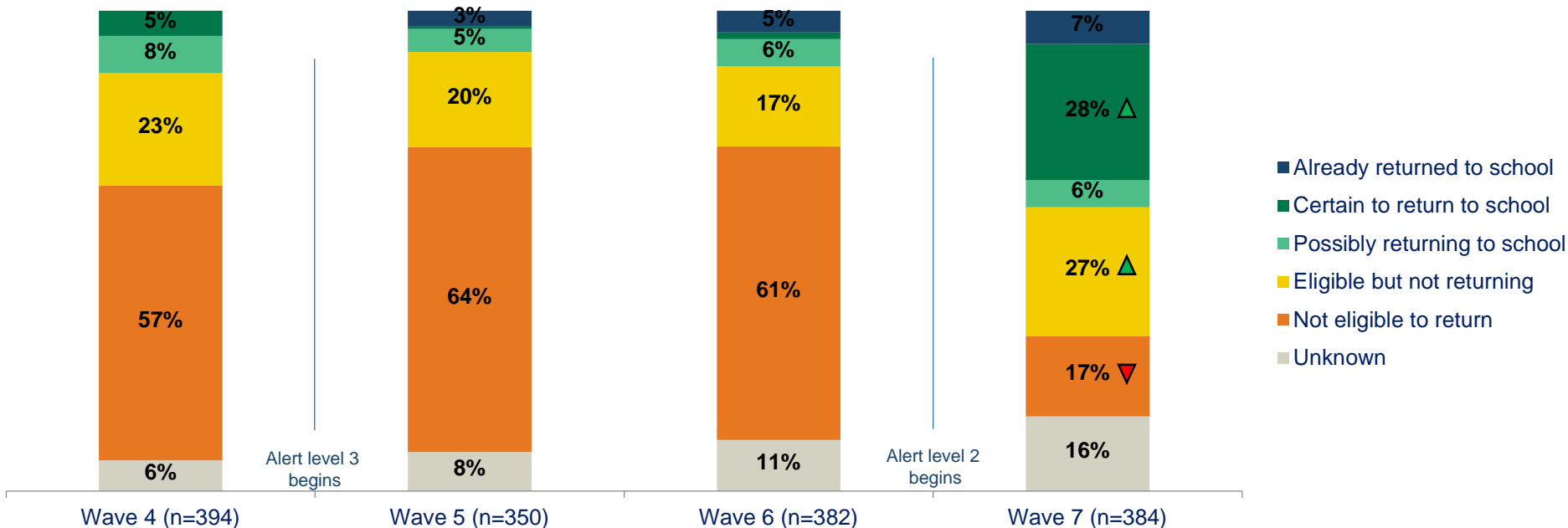
QHH1A. You said that you have children living at home with you. Which, if any of the following applies to you? QHH1B. And which, if any, of the following applies to you?

Base: those with children living at home



Over a third of parents say their children have or definitely will return, but there is still a large share of parents who are holding off

Intending / have returned children to school



NB: official eligibility during level 3 is for children of essential workers.

QHH1A. You said that you have children living at home with you. Which, if any of the following applies to you? QHH1B. And which, if any, of the following applies to you?
 Base: those with children living at home

