

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–12 weekly core report

23 June 2020

Disclaimer

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

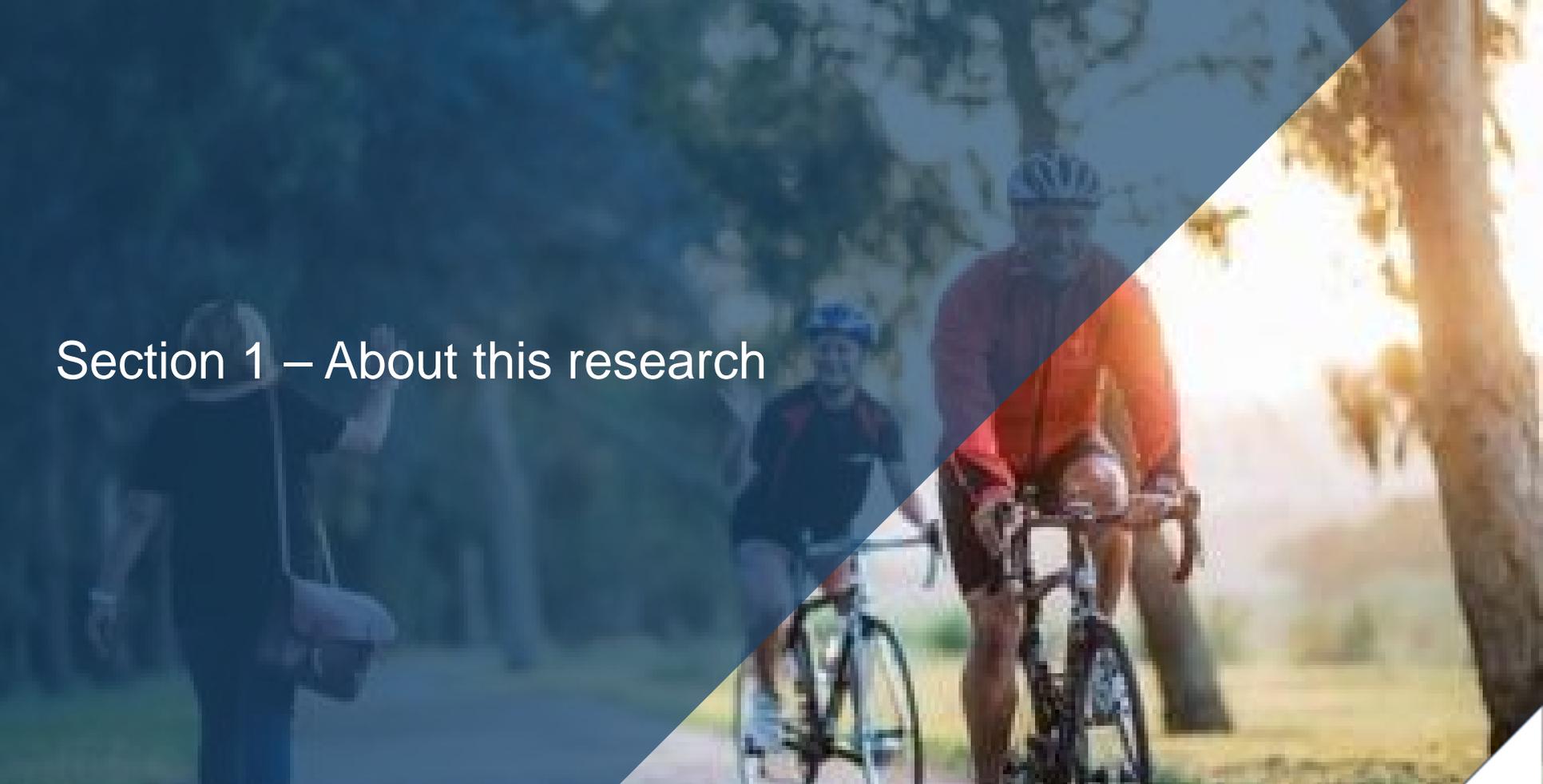
While Waka Kotahi provided investment, the research was undertaken independently, and the resulting findings should not be regarded as being the opinion, responsibility or policy of Waka Kotahi or indeed of any NZ Government agency.

For more information on the Covid-19 weekly tracker contact:
NZTAresearch@nzta.govt.nz.

Report content

COVID-19 transport impact

- Section 1 – About this research
 - Overview & technical notes
- Section 2 – Waka Kotahi transport key findings summary
- Section 3 – Local journeys and modes
- Section 4 – Public transport and mode-switching
- Section 5 – Non-essential & domestic journeys
- Section 6 – Future domestic tourism
- Section 7 – Attitudes leading to transport behaviour change
- Section 8 – Returning to the workplace



Section 1 – About this research

Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

Overview of research (i)

Research design and outputs

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

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

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

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

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

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

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



Example: Harmony dashboard page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys and domestic travel undertaken and changes

- change is measured since February 2020.

Modal shift patterns and perceptual shifts

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

Measuring attitudinal shifts towards COVID-19

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

Questions to classify into a variety of segments of interest

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

Ad hoc questions of interest

- including perceptions of future workplace flexibility, domestic tourism intentions, intention to return children to school, e tc.

Report notes (i)

Key information to note for this report

- This report is based on twelve 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, 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' i.e. in February this year.
- At a total population level, significance testing indicated in this wave 12 report is based on a statistically significant shift of results between waves 1 to 12, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs. combined level 2 alerts vs. level 1 alert (with only one wave of data).
- 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.

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	Alert level 1
11	Thursday 11 June to Sunday 14 June	
12	Thursday 18 June to Sunday 21 June	

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 – 12	
		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=2,531	1.95
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=662	3.81
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=200	6.93
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=200	6.93
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=412	4.83
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=200	6.93
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=206	6.83
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=651	3.84
Disability, Vulnerability and COVID-19**									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=270	5.96
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=564	4.13
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=309	5.57

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

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

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.

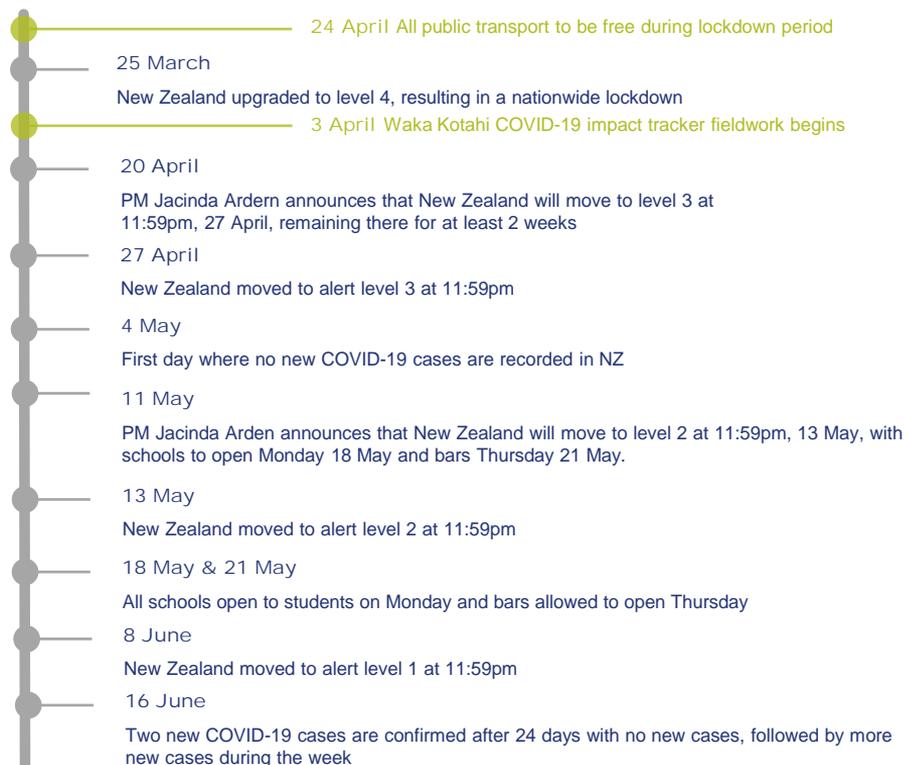
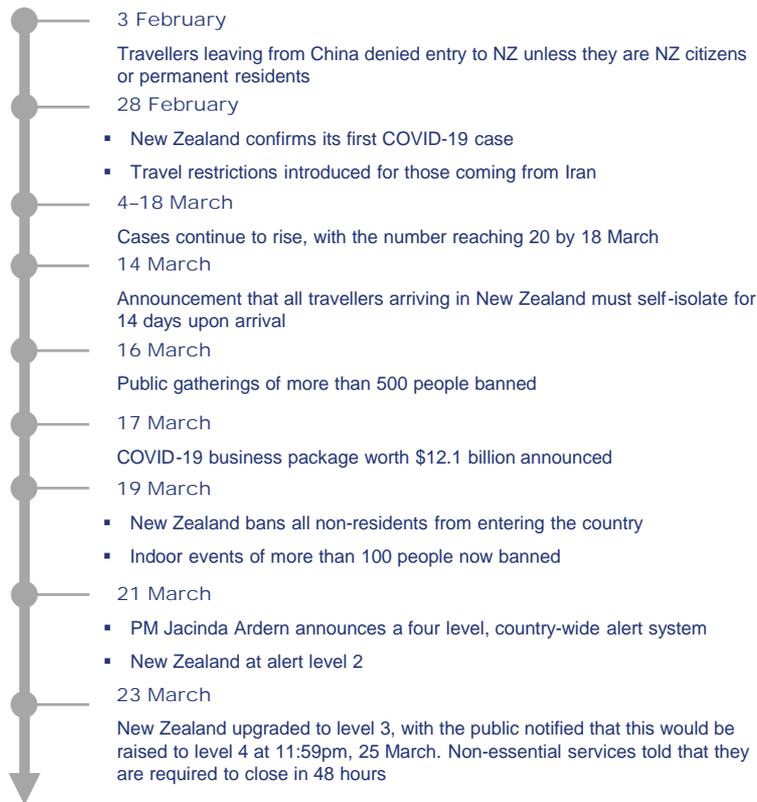
Active modes: refers to walking (of at least 10 mins) and cycling, including e-bikes.

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.

Context: New Zealand COVID-19 timeline



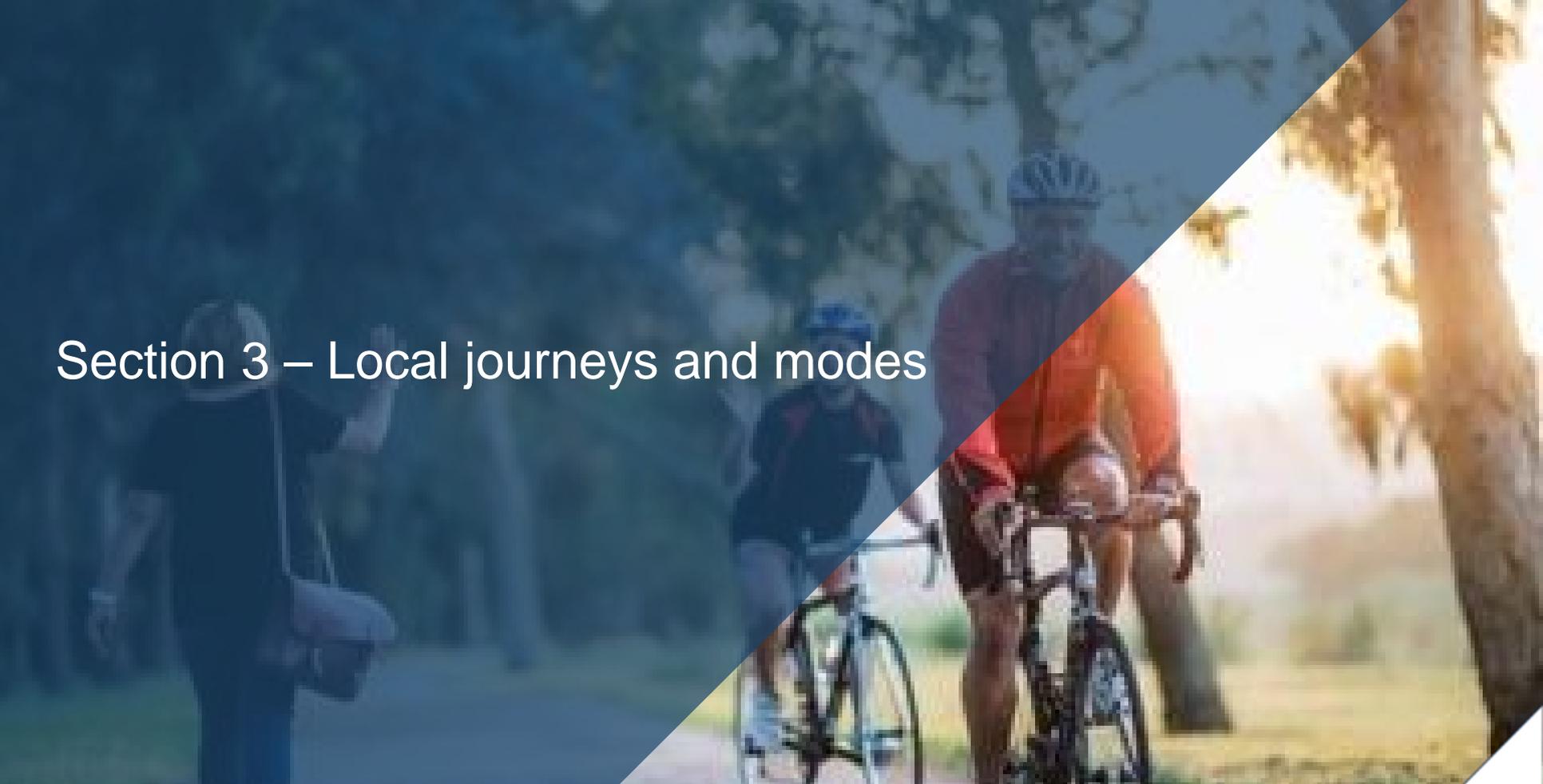


Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–12

Waka Kotahi COVID-19 transport impact tracker

- Wave 12 of fieldwork is the second under level 1 conditions and occurred during a week in which new cases of COVID-19 developed for the first time since it was announced that New Zealand was free of any virus cases. This has been accompanied by an increase in the level of concern cited around transmission and infection.
- Travel activity is continuing to return to normal, although a small minority are still self isolating in level 1.
- Local journeys continue to increase in level 1, with the proportion taking children to school now equivalent to pre-alert levels although there is still a pronounced gap in those returning to the workplace.
- The proportion claiming to use public transport at least once a week has increased further in wave 12, primarily driven by growth in reported weekly bus usage. **Note that this does not reflect the volume of trips being made, just the proportion travelling at least once in a seven-day period.**
 - Findings indicate that roughly 10% of normal weekly public transport users have not returned to the services, these former users currently cite reduced need as the major theme for their usage reduction.
 - There has been an increase (to almost half) in those saying that they will return once COVID-19 alerts are ended.
 - Of those switching commuting modes *from* public transport, the chief reasons cited are being worried about COVID-19 conditions, and the convenience of their new chosen commuting mode.
- Non-essential local journeys have not increased during wave 12, remaining stable for the second consecutive wave.
- There has been a significant decrease in inter-regional domestic journeys overall, primarily due to a sharp fall in the proportion who have made trips to visit friends and family in other regions.
- When it comes to domestic tourism, there has been a sudden shift in concerns about COVID-19 transmission and its potential to cause travel disruption among those who expect to travel less for tourism reasons during the next six months.
- At the same time, there has been a directional decrease in the proportion likely to travel and in the projected NETT change in tourism travel across New Zealand.
- The intended destinations of those expecting to travel more indicate that there may be some increase in demand for planes and ferries, as roughly half in each island intend to make inter-island travel part of their plans.
- The majority agree that others are following rules when it comes to isolating when presenting with symptoms, there is little regional variation in this, but older people (65+ years) appear to feel people are being more adherent compared to other age groups.
- Changes in the working population with regards to working from home appear to have stabilised, as have attitudinal factors around preference and workplace conditions.

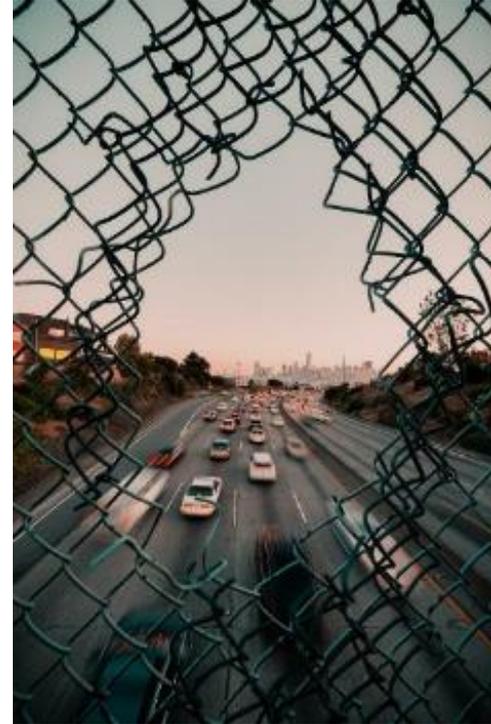


Section 3 – Local journeys and modes

Key findings – local journeys and modes

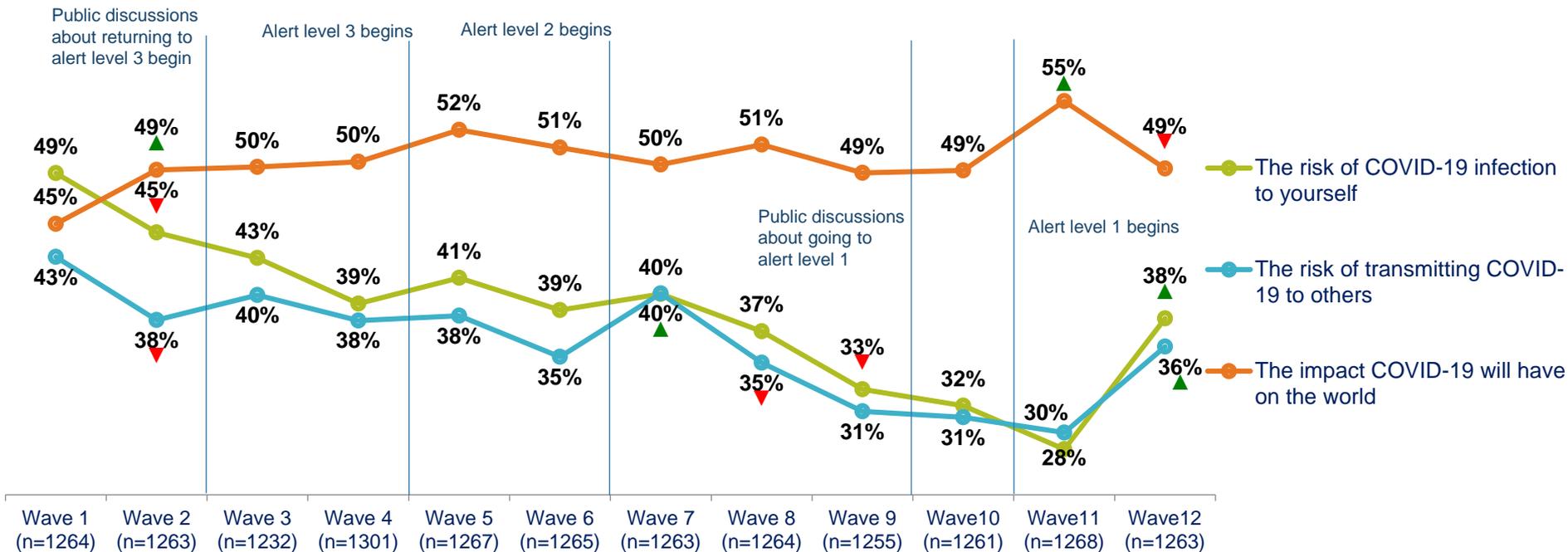
Waka Kotahi objective – how is travel changing?

- 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 focuses on travel for local, essential journeys during this time.
- Following a week in which new cases of COVID-19 were reported in New Zealand, there has been an increase in levels of concern about infection and transmission for the first time since the beginning of level 2.
- Under level 1 conditions, 69% say that they have left the house for reasons *other* than essential travel during the last week, although 31% still indicate some form of self-isolation.
- The incidence of people taking children to or from school has now returned to pre-alert levels, with just over a fifth doing so, while the proportion travelling to work is still 10 points below normal levels.
- The rates of weekly public transport usage continue to recover, chiefly driven by a sharp increase in reported weekly bus usage during wave 12.
- This is accompanied by a significant recovery in bus usage consideration for the week ahead.



In the weekend following the announcement of new COVID-19 cases, concerns about transmission and infection jumped significantly

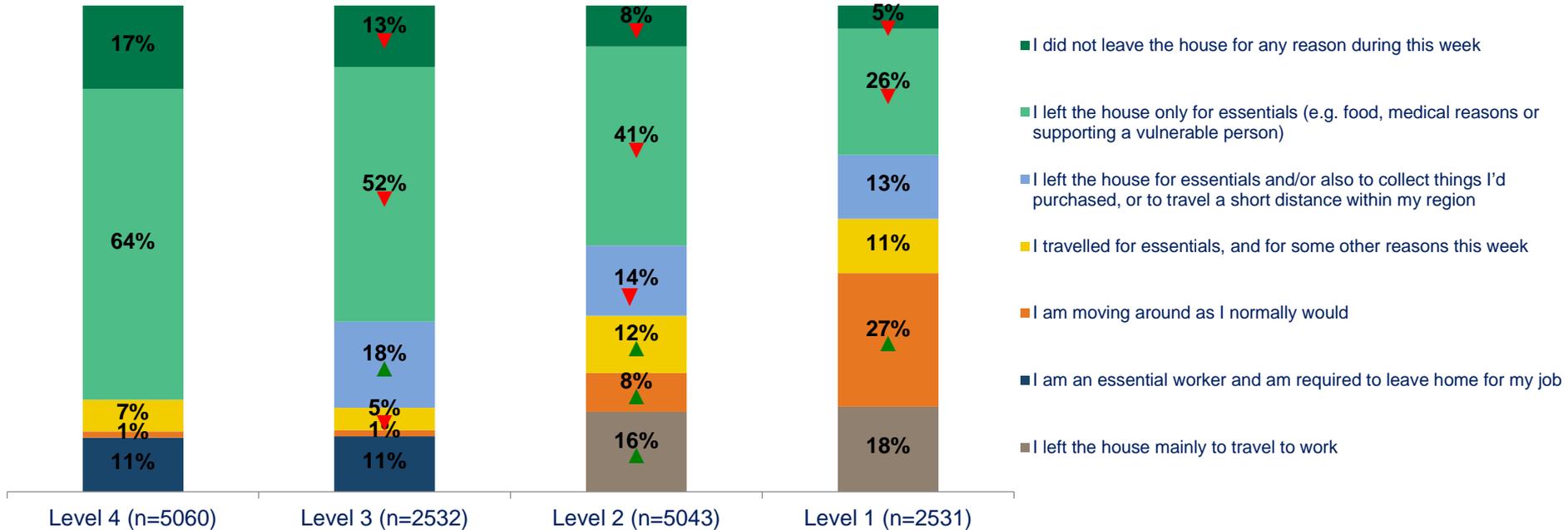
COVID-19 concerns (NETT all concerned)



QPTUSE3. How personally concerned are you about each of the following?
 Base: all adults 15+ in New Zealand

In level 1, more than a quarter say they are moving around as normal, with just over three in 10 at least partially isolating

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



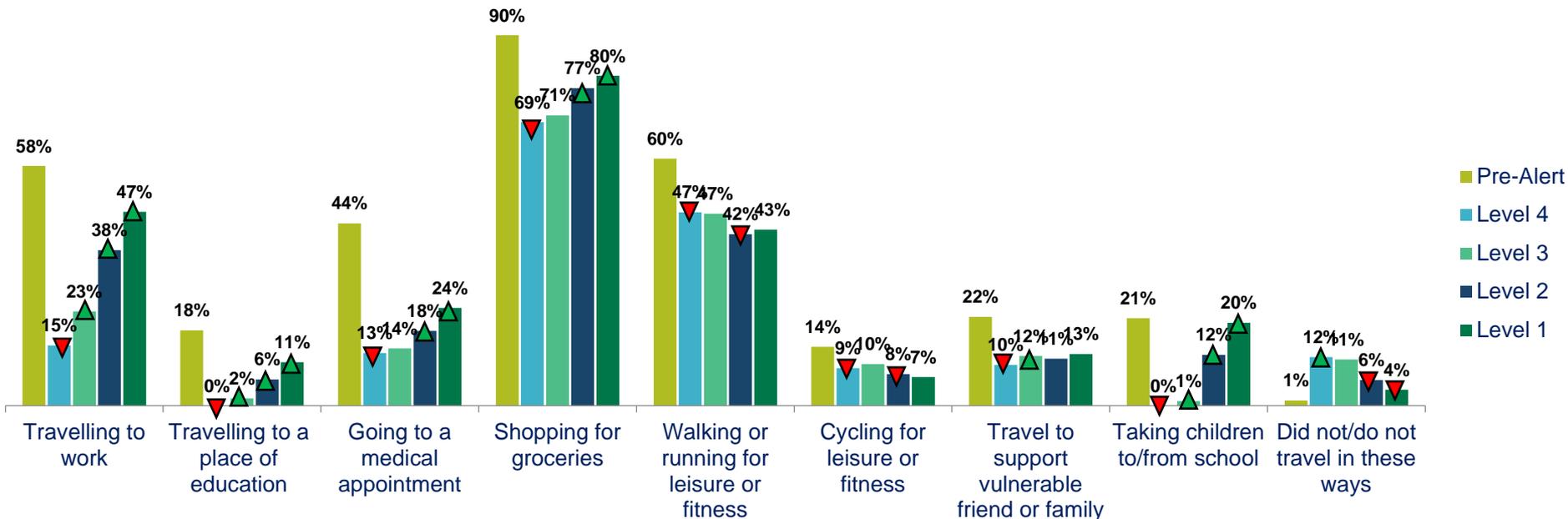
ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

Base: all adults 15+ in New Zealand



The proportions travelling for work and shopping are now close to 10 points below pre-alert levels, with the proportion taking children to school almost back to normal

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



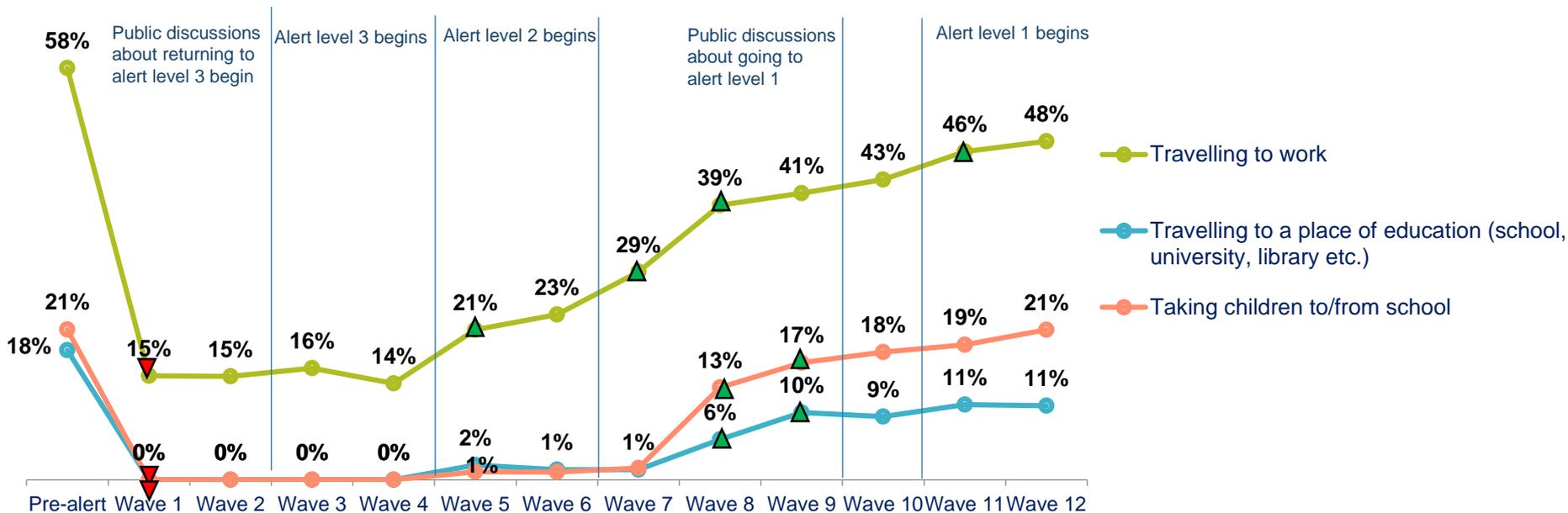
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)?/And which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand in Benchmark wave (n=3,759); Level 4 (n=5,060); Level 3 (n=2,532); Level 2 (n=5,043); Level 1 (n=2,531)



In wave 12, the proportion taking children to and from school is now back to approximately the same as pre-alert levels

Reported activity and movement during the past seven days by wave

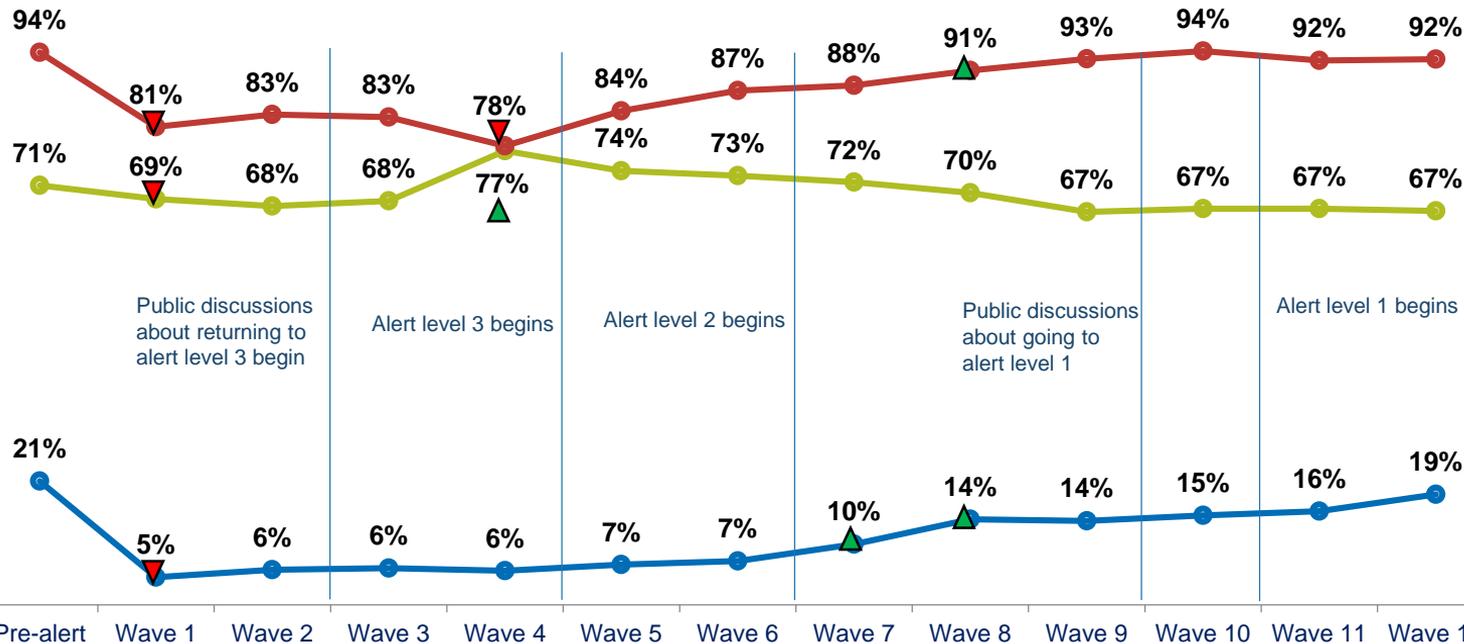


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)?/And which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand 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), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263)

The proportion who are using public transport at least once a week is now only two points below pre-lockdown levels

Changes in mode usage by wave



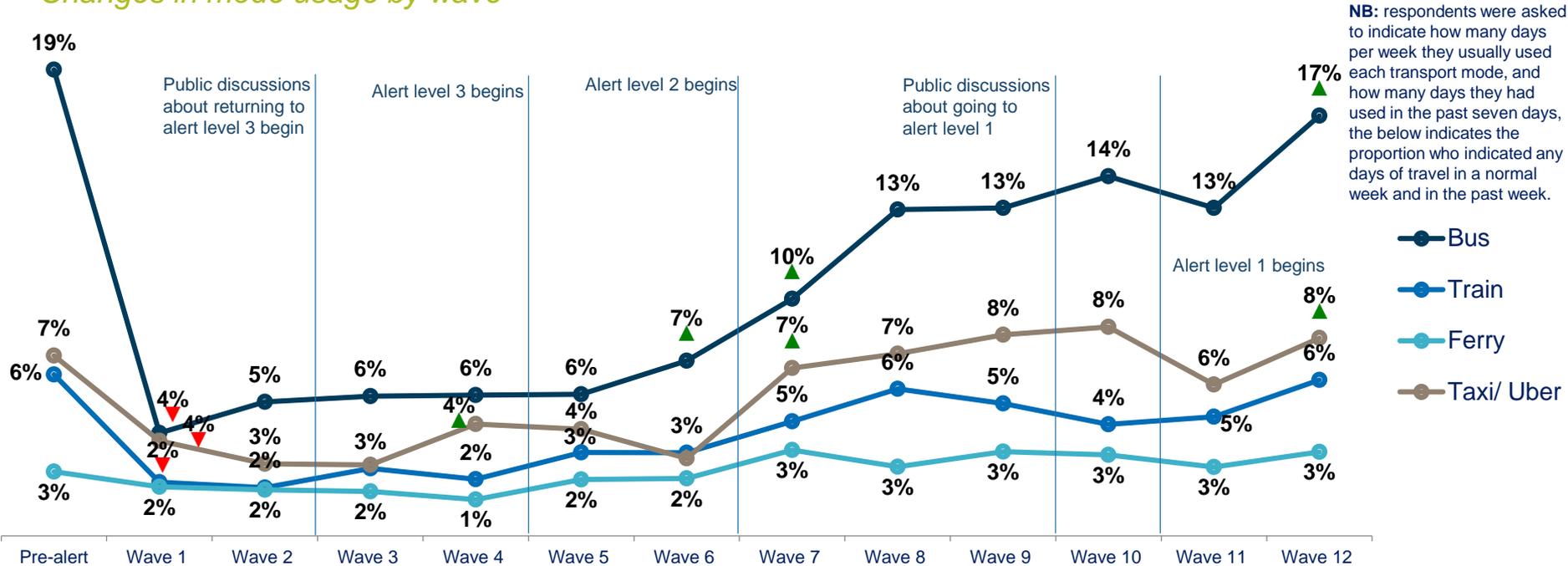
NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.

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

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), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263)

The proportion of weekly bus users jumped significantly in the most recent wave, driving the increase in overall public transport usage

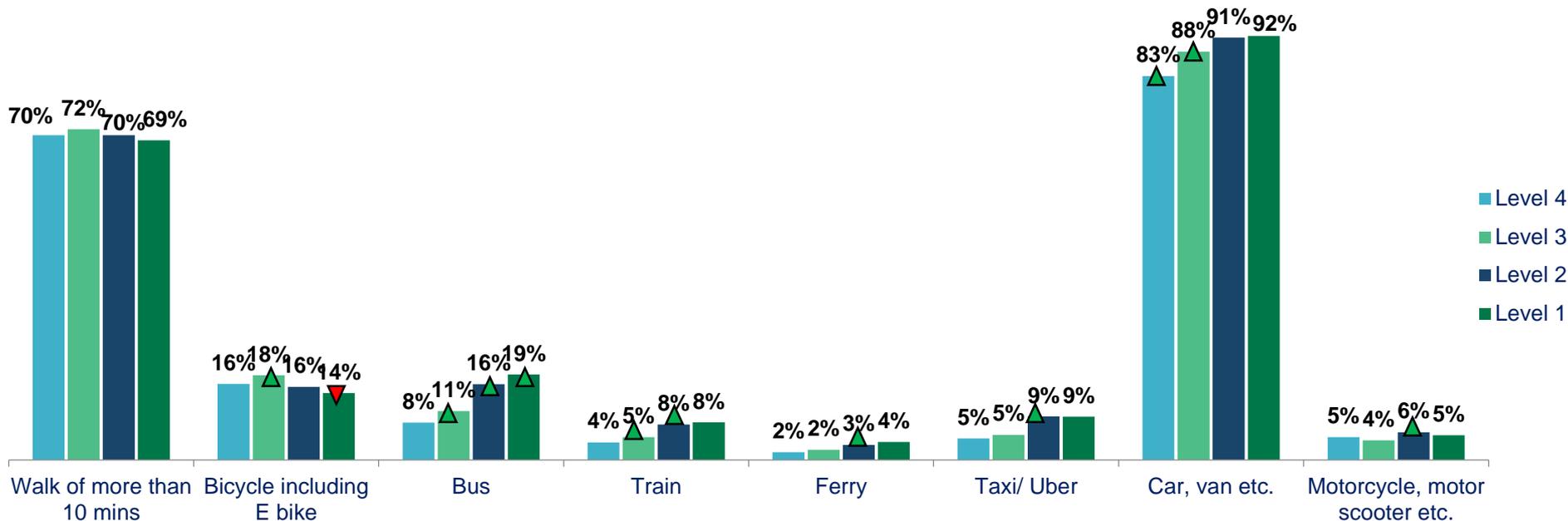
Changes in mode usage by wave



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 (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), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263)

Around one in five of those interviewed in level 1 would consider using the bus in the next week

Mode consideration: coming week by alert level



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

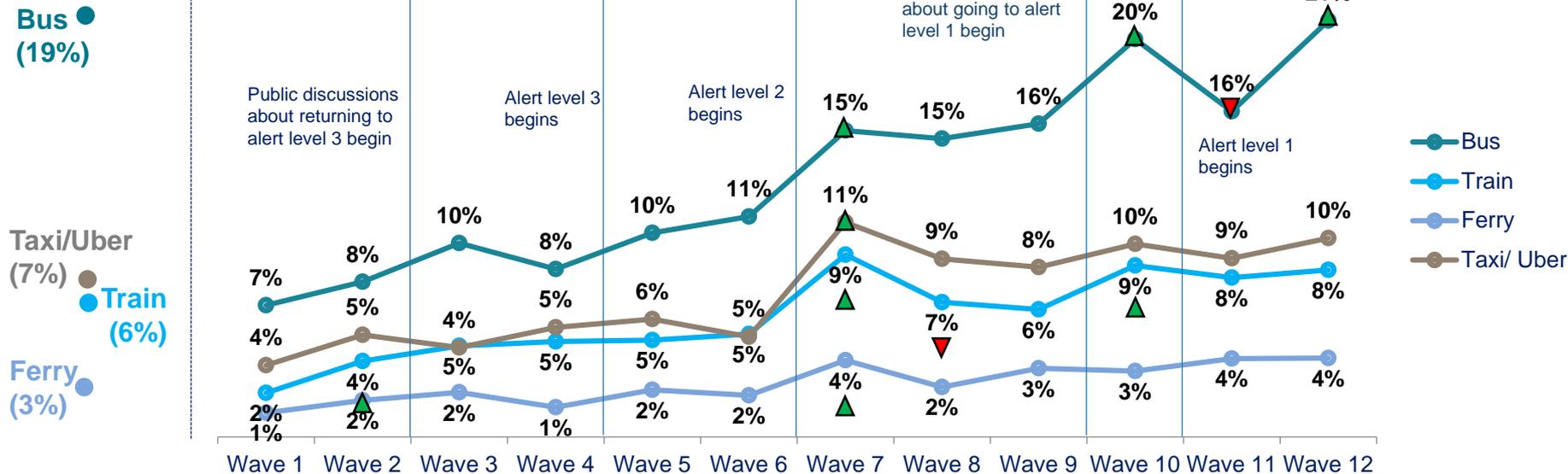
Base: all adults 15+ in New Zealand who normally travel; level 4 (n=4,999), level 3 (n=2,499), level 2 (n=4,959), level 1 (n=2,495)



After dropping in wave 11, consideration of bus as a transport mode is now greater than pre-lockdown usage

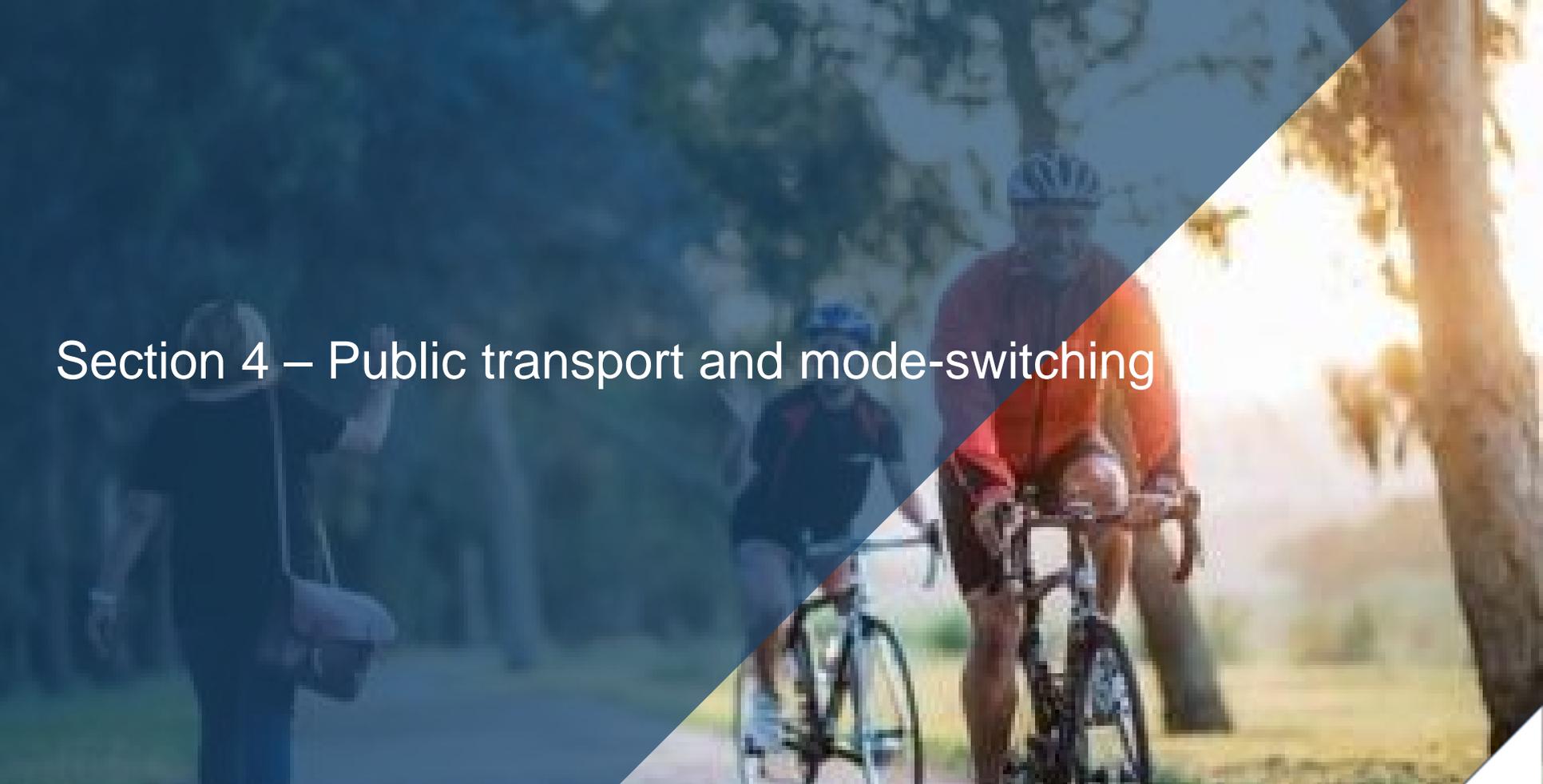
Mode consideration: coming week by wave

Pre-alert usage



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; Wave 1 (n=1,249); Wave 2 (n=1,247); wave 3 (n=1,217); wave 4 (n=1,286), wave 5 (n=1,244), wave 6 (n=1,255), wave 7 (n=1,244), wave 8 (n=1,238), wave 9 (n=1,234), wave 10 (n=1,243), wave 11 (n=1,250), wave 12 (n=1,245)

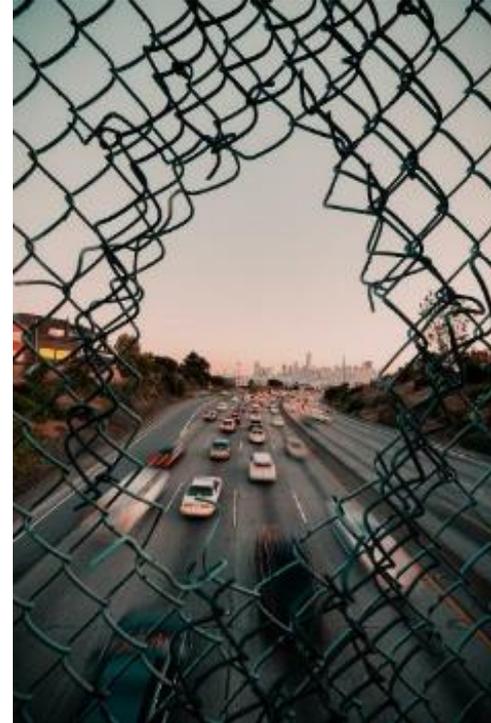


Section 4 – Public transport and mode-switching

Key findings – public transport and mode-switching

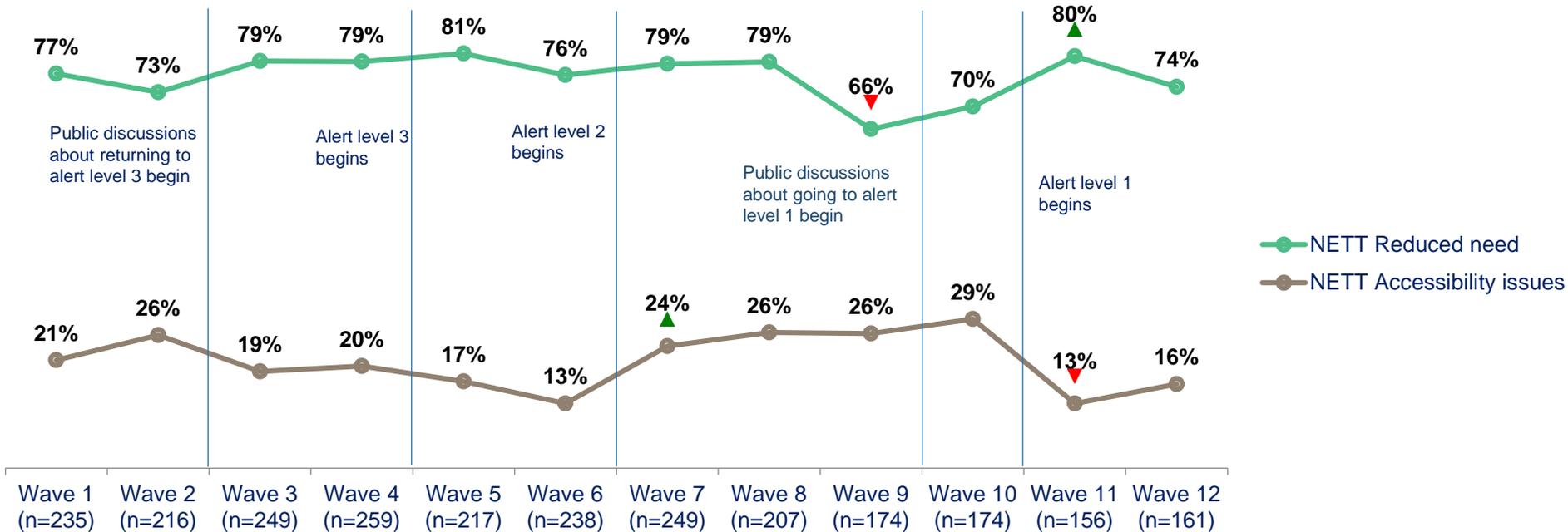
Waka Kotahi objective – why is travel changing?

- Within the context of public transport services returning to normal capacities it is important to track and understand the drivers of returning usage and the barriers that may still keep some passengers away.
- During level 2, when service provision was widened as many returned to work, there was a greater incidence of accessibility issues being cited as a reason for not returning to the services. This has dropped off in level 1 when those not travelling are more likely to say they just have no reason to do so.
- Close to half of those not returning to public transport say that they will do so when COVID-19 alert levels end entirely; this has seen a resurgence since new cases were announced in the preceding week.
- Among those who have switched from public transport as a commuting mode, fears of COVID-19 transmission and factors relating to convenience are equally cited as a reason for doing so.
- Those switching from active modes are more likely to cite issues relating to weather and environmental conditions.
- When it comes to convenience, those switching from public transport are likely to do so because they believe their chosen new mode of commuting is just easier to use than public transport was.



Accessibility issues have been less cited in level 1 as a reason for not using public transport than they were in level 2

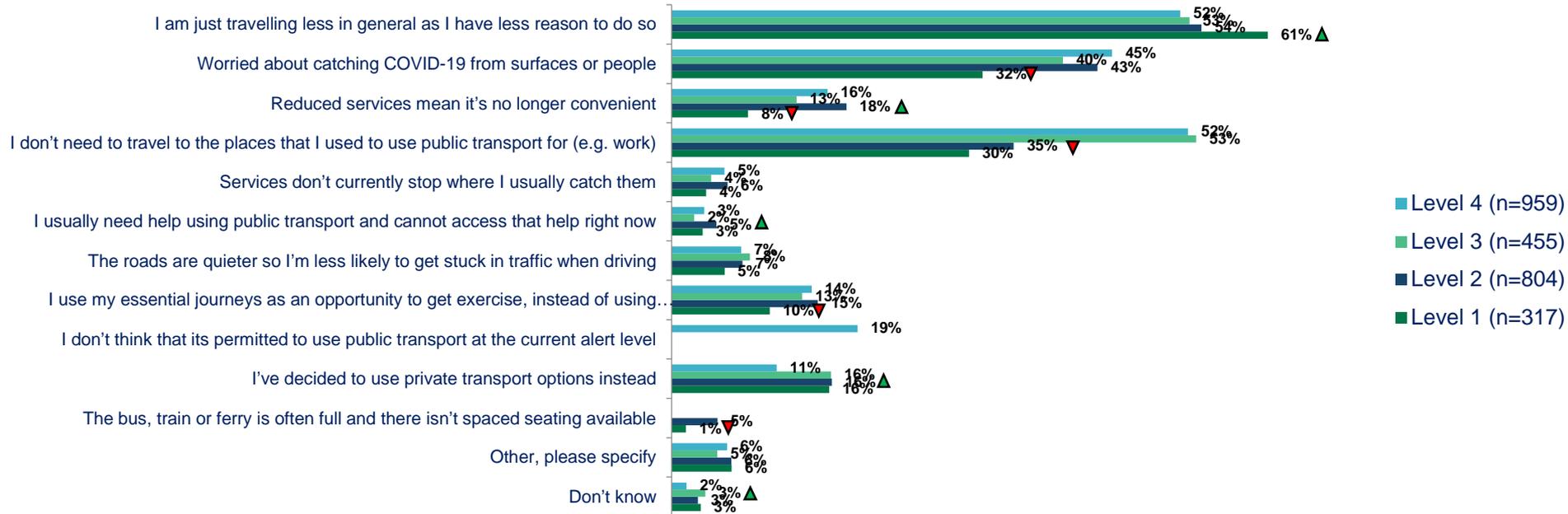
Reasons for decrease in PT usage



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

In level 1, a reduced level of need is the single most cited reason for using public transport less than usual

Reasons for decrease in PT usage



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



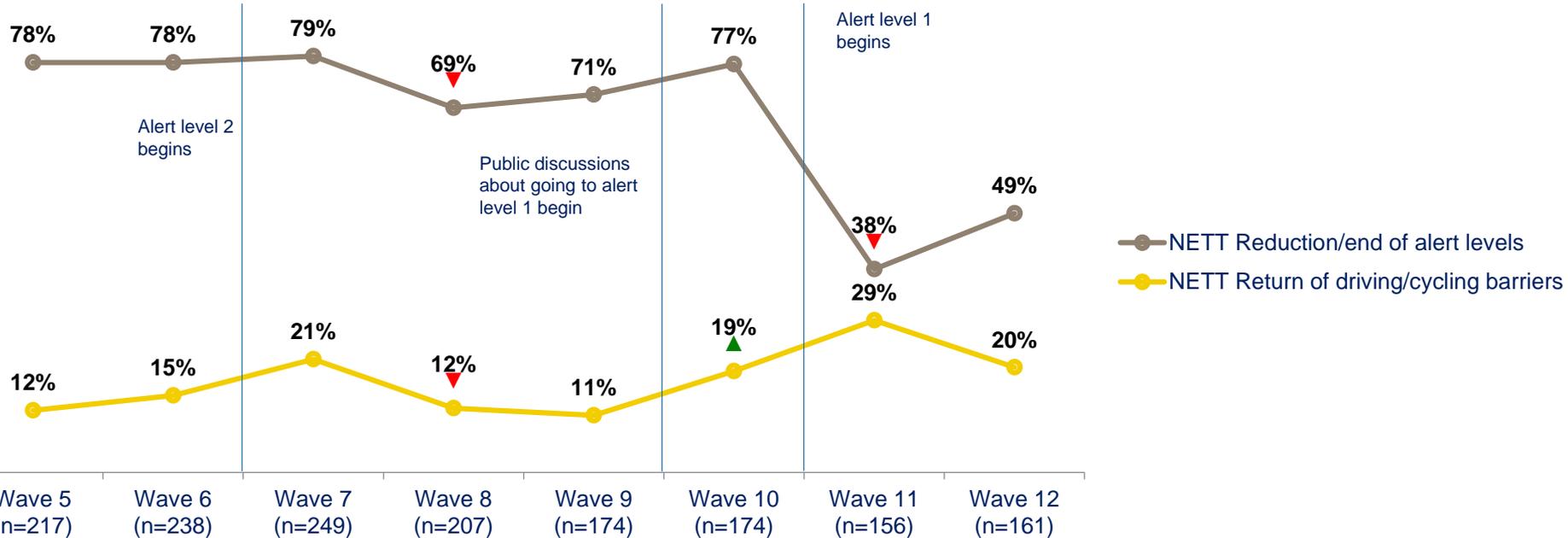
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Although not statistically significant, there has been an increase in the proportion of people citing the end of alert levels as a reason to return to public transport

Triggers for returning to public transport usage in the future

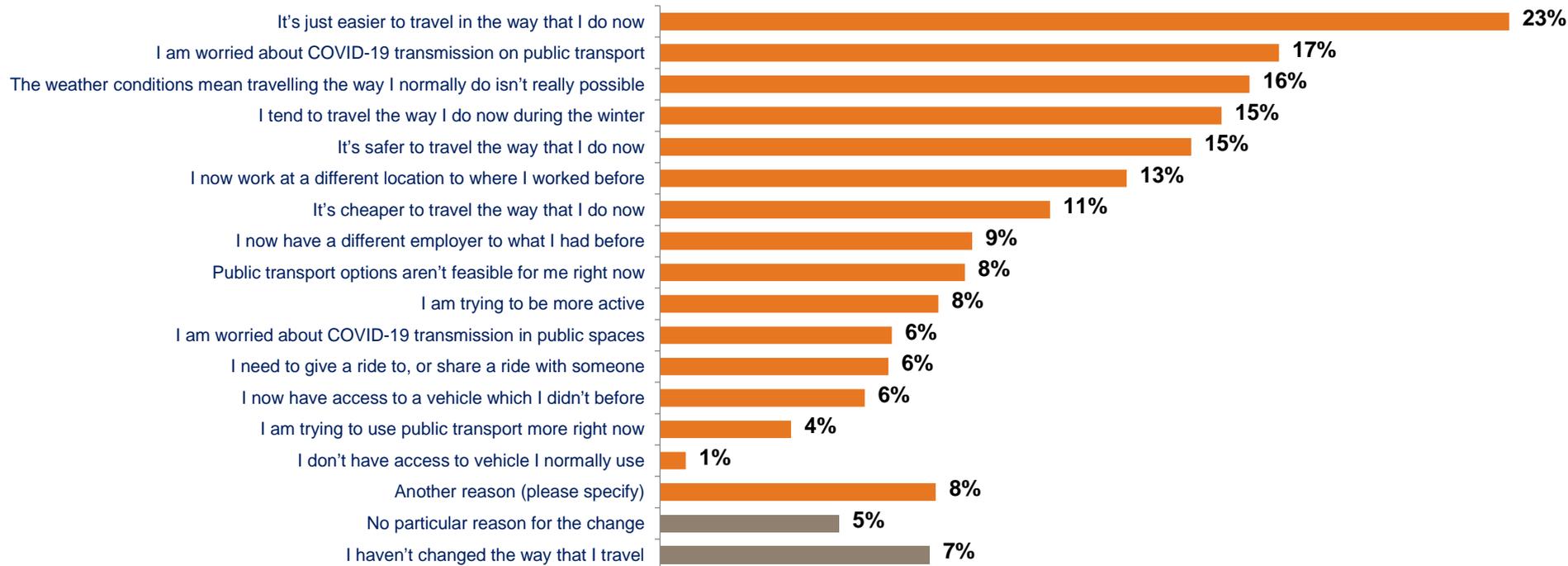


QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?
Base: decreasing PT usage in past week



Ease and convenience are the most cited reasons for changing commuter mode over the past three weeks

Reasons for changing commute mode

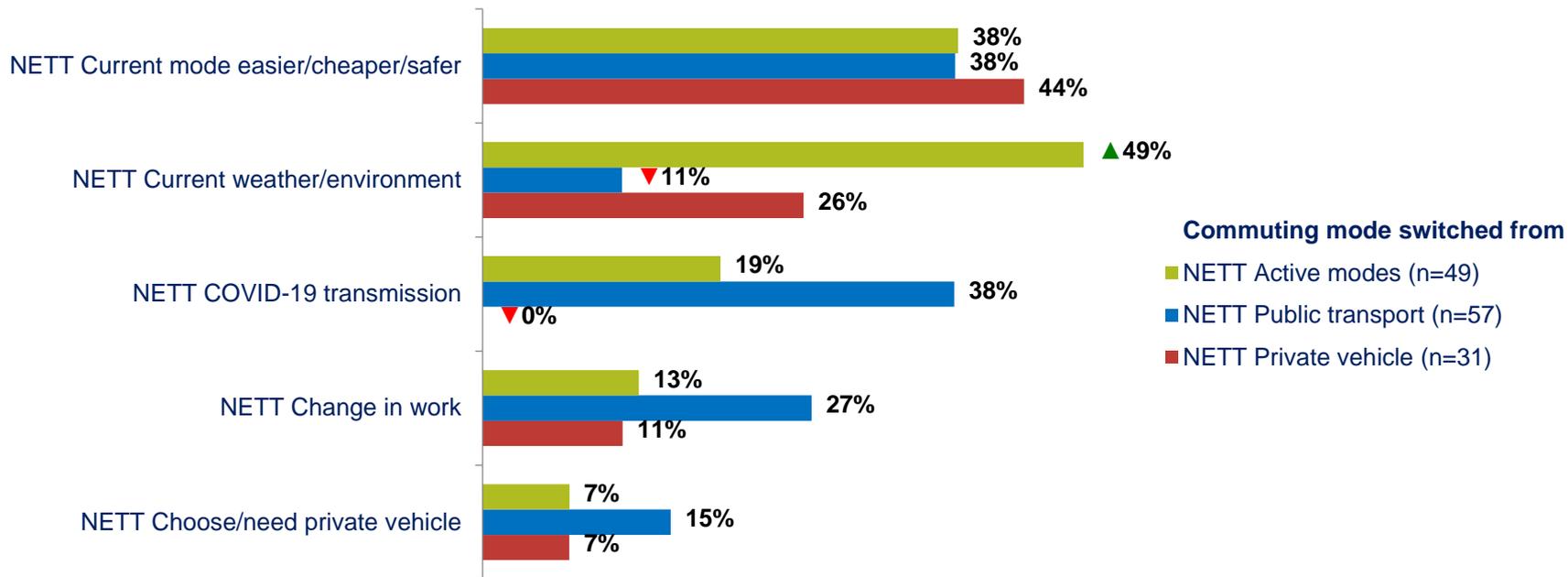


QWORKMODE. You indicated that in the past seven days you have travelled to work using a different mode to what you would have during a normal week. (e.g. in February of this year) For which, if any of the following reasons did you change the way that you travelled to work?

Base: all adults 15+ in New Zealand who have changed commute mode in waves 10, 11 and 12 (n=140)

People who normally commute by public transport are more likely to cite COVID-19 transmission concerns as a reason for changing mode

Reasons for changing commute mode by normal commute mode used



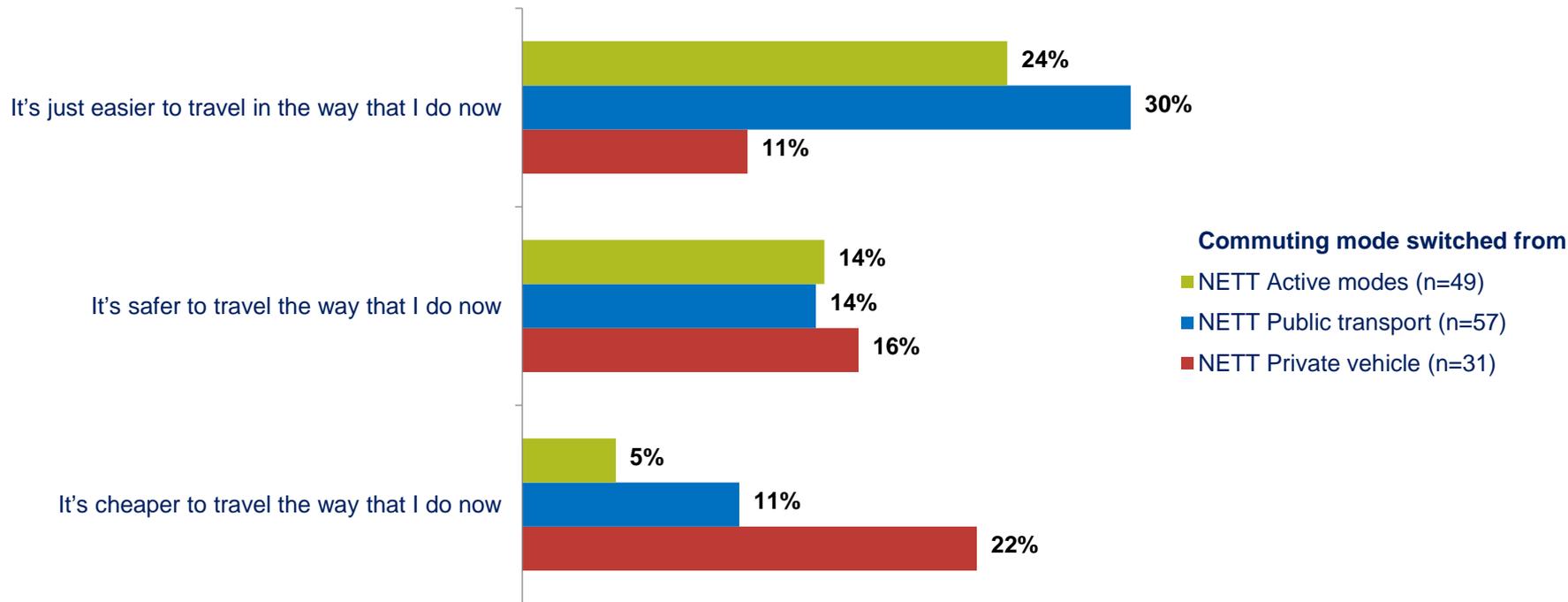
QWORKMODE. You indicated that in the past seven days you have travelled to work using a different mode to what you would have during a normal week. (e.g. in February of this year)
For which, if any of the following reasons did you change the way that you travelled to work?

Base: all adults 15+ in New Zealand who have changed commute mode in waves 10, 11 or 12



Three in 10 of those normally travelling by public transport say the mode they choose now is an easier way to travel

Reasons for changing commute mode – reasons easier/cheaper/safer



QWORKMODE. You indicated that in the past seven days you have travelled to work using a different mode to what you would have during a normal week. (e.g. in February of this year)
For which, if any of the following reasons did you change the way that you travelled to work?

Base: all adults 15+ in New Zealand who have changed commute mode



A photograph showing a person walking on the left and two cyclists on the right, all on a path. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is dark blue, and the lower-right portion is a lighter, natural color. The text 'Section 5 – Non-essential & domestic journeys' is overlaid in white on the dark blue area.

Section 5 – Non-essential & domestic journeys

Key findings – non-essential & domestic journeys

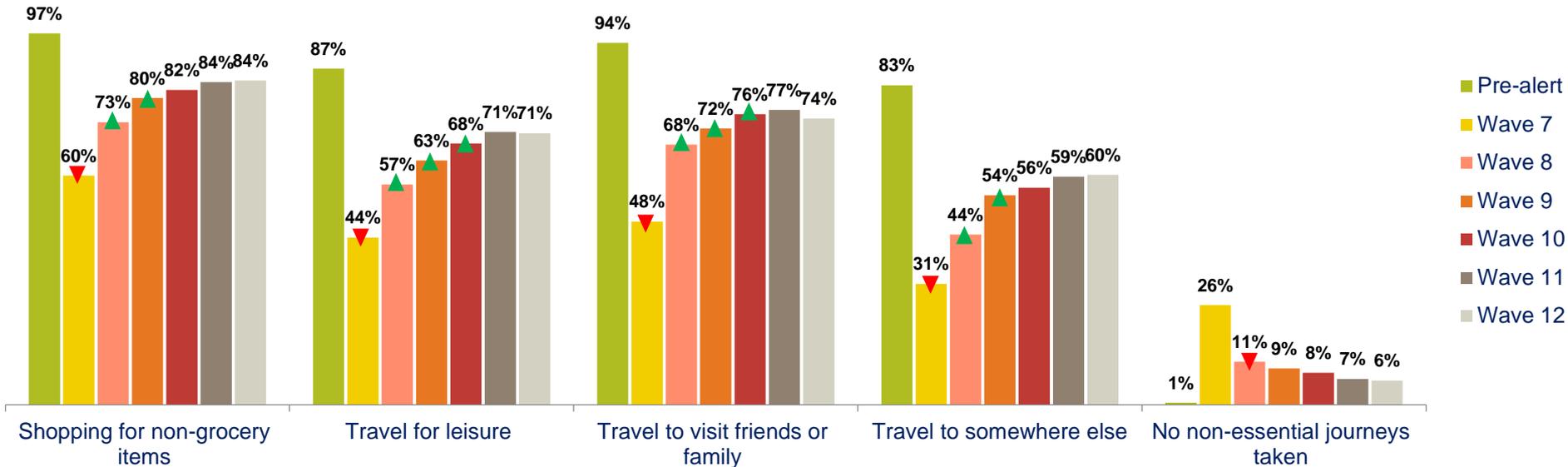
Waka Kotahi objective – how is non-essential & domestic travel changing?

- 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 non-essential journeys, and the ways domestic inter-regional travel is being taken up in level 1.
- For the second consecutive week, there has been little to no growth in the proportion travelling for non-essential reasons such as leisure, non-grocery shopping or visits to local friends and family.
- For the first time since measurement began, there has been a significant *decrease* in the proportion reporting inter-regional travel, primarily driven by a seven point decrease in those travelling to visit friends and family in other regions.



The rate of non-essential journey growth has slowed over the past three weeks, with no statistically significant changes

Non-essential journeys

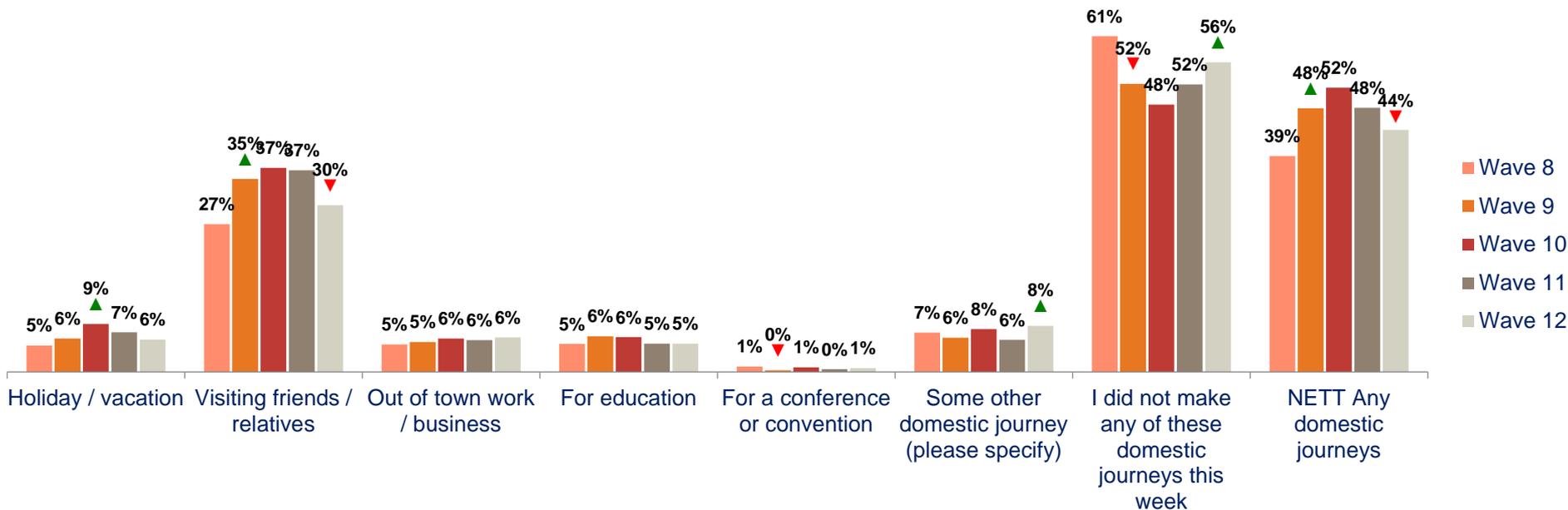


QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
 Base: all adults 15+ interviewed during level 2 and level 1 in New Zealand (n=7,574)



The proportion not taking any non-essential journeys has grown by a statistically significant extent, due in part to declining visits to friends and family

Domestic journeys in the past seven days by wave



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; wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263)





Section 6 – Future domestic tourism

Key findings – future domestic tourism

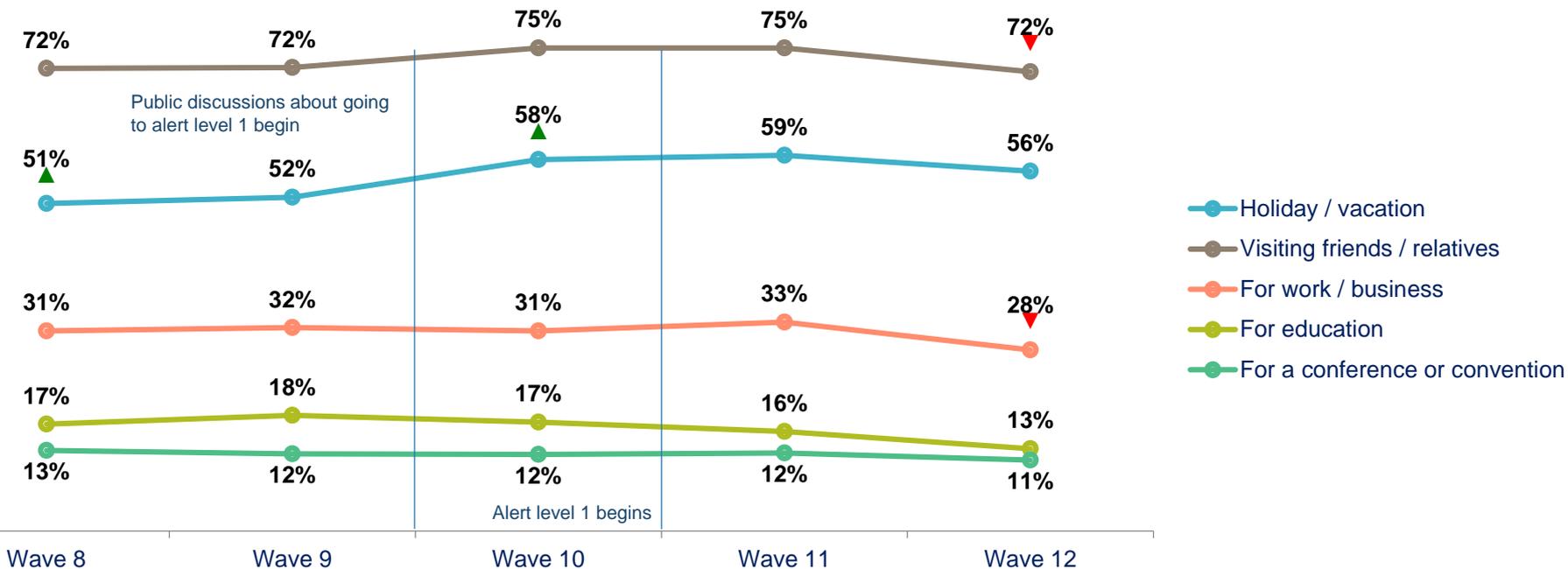
Waka Kotahi objective – how will domestic tourism change going forward?

- 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.
- The proportion intending to travel more to visit friends and family has dropped off following several weeks of growth, mirroring the significant decrease in those reporting this type of inter-regional travel during this wave.
- Intention to travel has dropped off slightly for all tourism journey types and results indicate that this is in large part related to resurgent COVID-19 transmission and infection concerns.
- Travellers are not only concerned about the risk of infection to themselves, but also the potential for travel disruption that might occur with an elevated lockdown status.
- Although more are planning trips to the North Island, the proportion planning to travel to or within the South Island somewhat over-indexes against the population share, this is in part because nearly half of North Islanders intend to travel to the South Island.



The proportion saying they are likely to make some form of domestic tourism journeys is trending downwards

Proportion saying that they are likely to make domestic journeys in the next six months

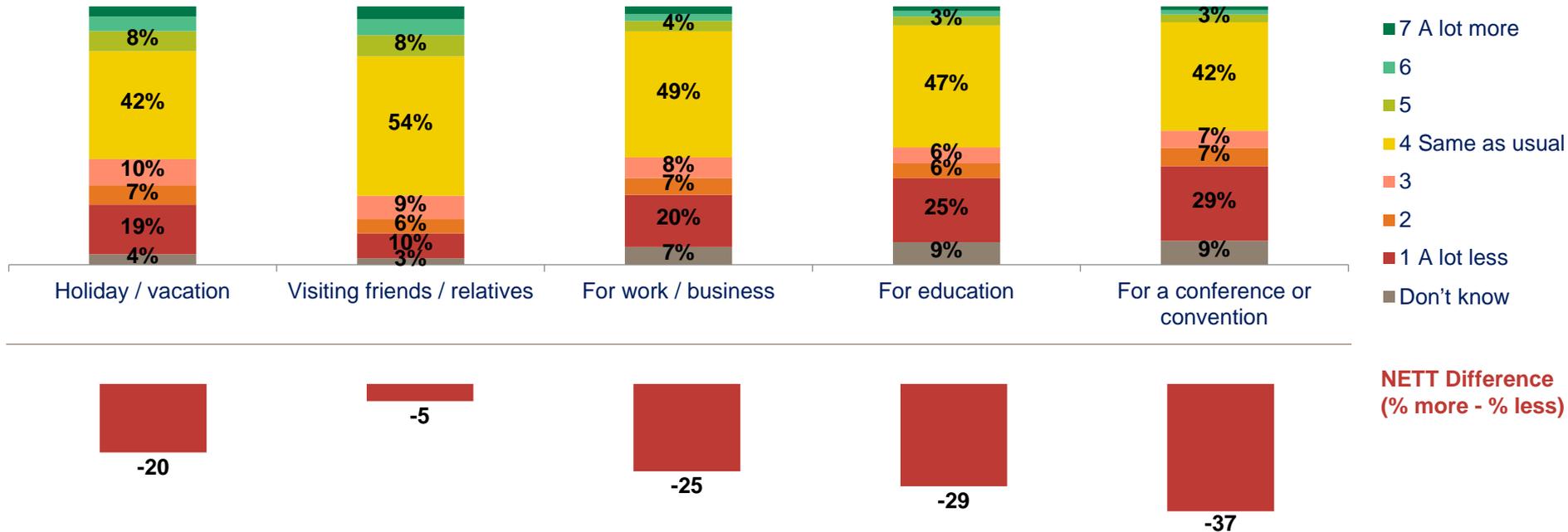


FDT1. How likely are you to make following types of domestic journeys in the next six months?
 Base: all adults 15+ in New Zealand



The reported change in volume of intended travel indicates that there will still be a NETT decrease in all domestic tourism journey types

Intention to travel more or less domestically

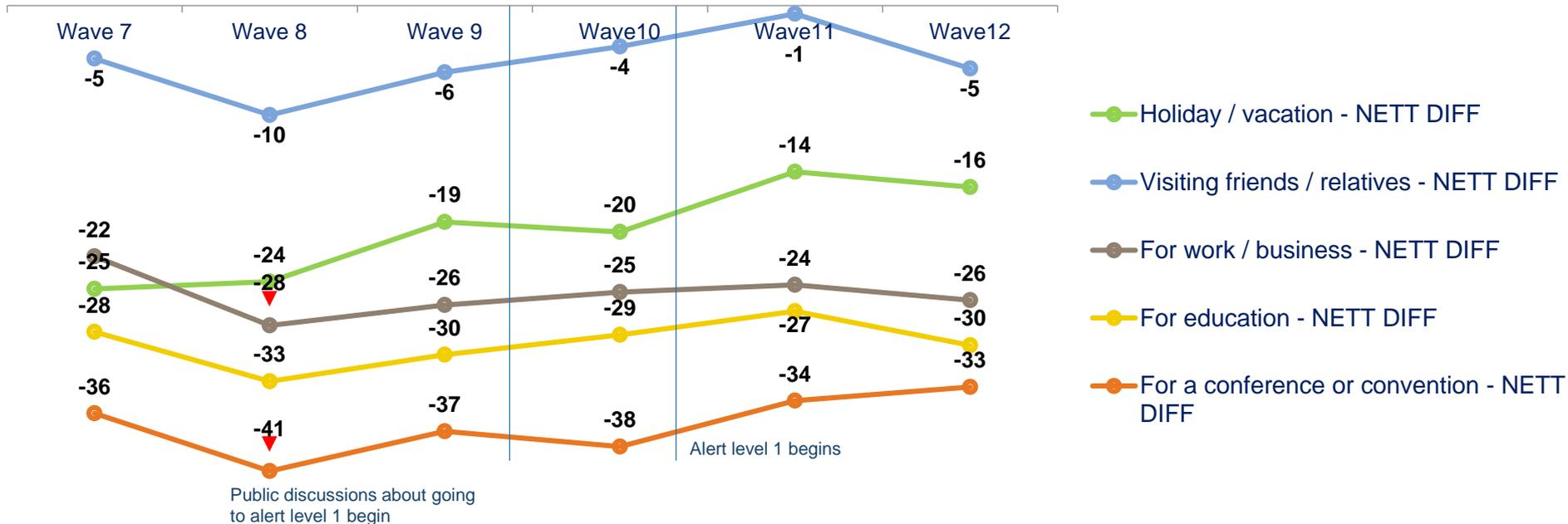


FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand

After trending upwards for several weeks, the projected NETT growth in those travelling to visit friends is becoming more negative

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



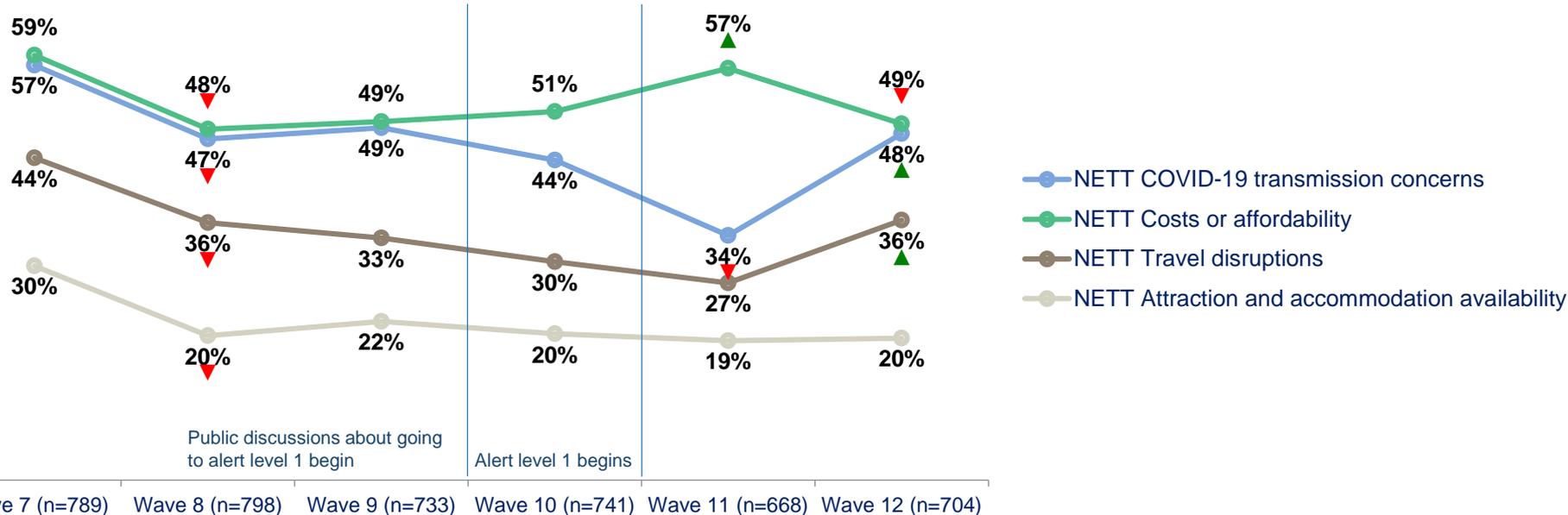
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

Among those planning to travel less, there has been a significant upturn in those citing COVID-19 transmission or travel disruption concerns

Reasons for travelling less

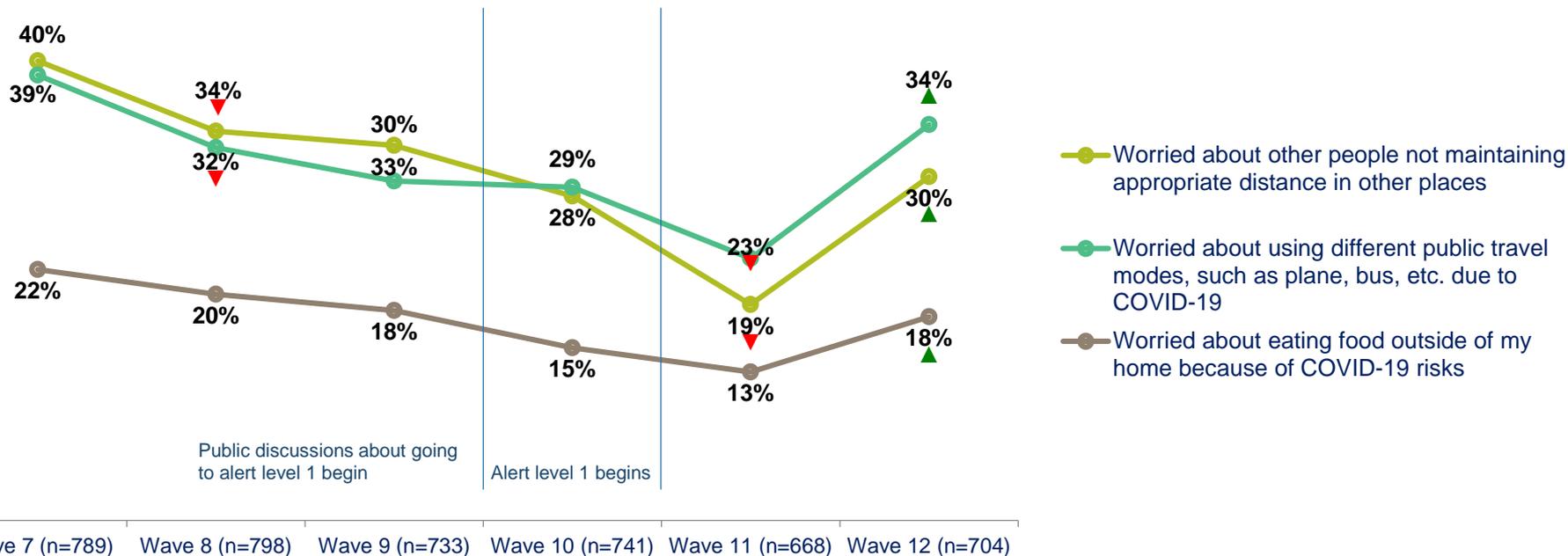


FDT3a. What are the main reasons that you intend to travel less?
 Base: all adults 15+ in New Zealand intending to travel less



All three COVID-19 transmission concerns grew significantly during the most recent wave

Reasons for travelling less – COVID-19 concerns



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



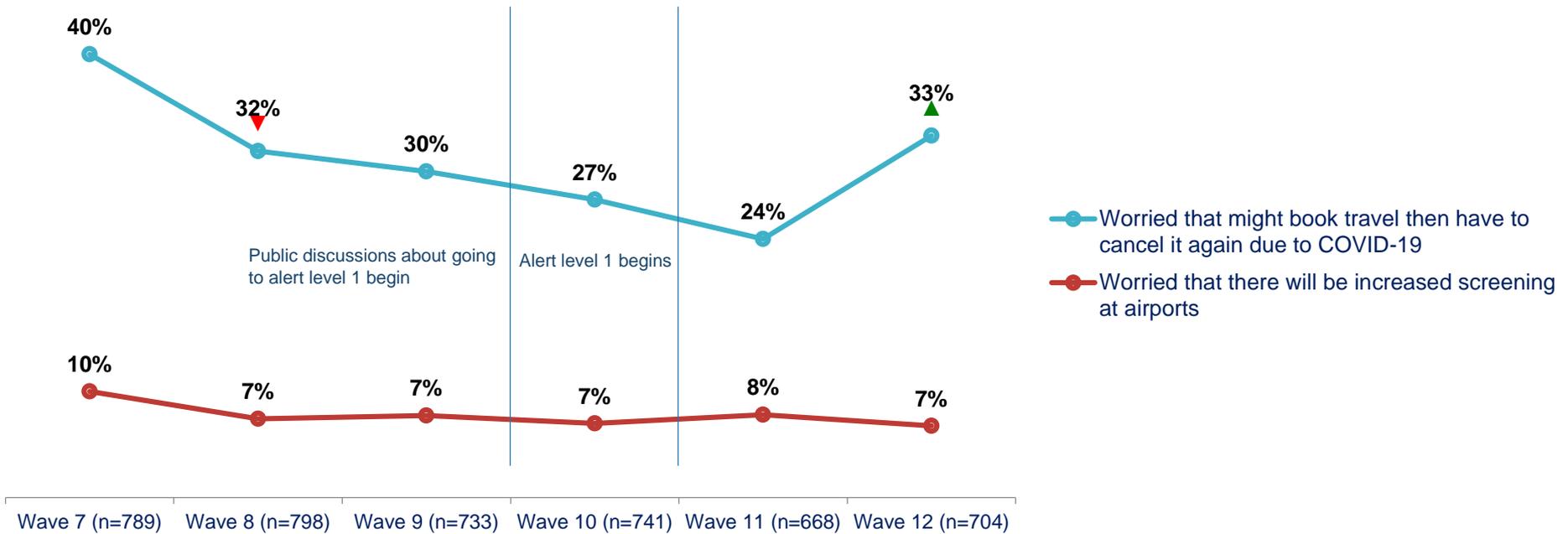
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

There has been no growth in the proportion worried about increased screening, but a third say they're worried that COVID-19 may cause cancellations

Reasons for travelling less – travel disruptions

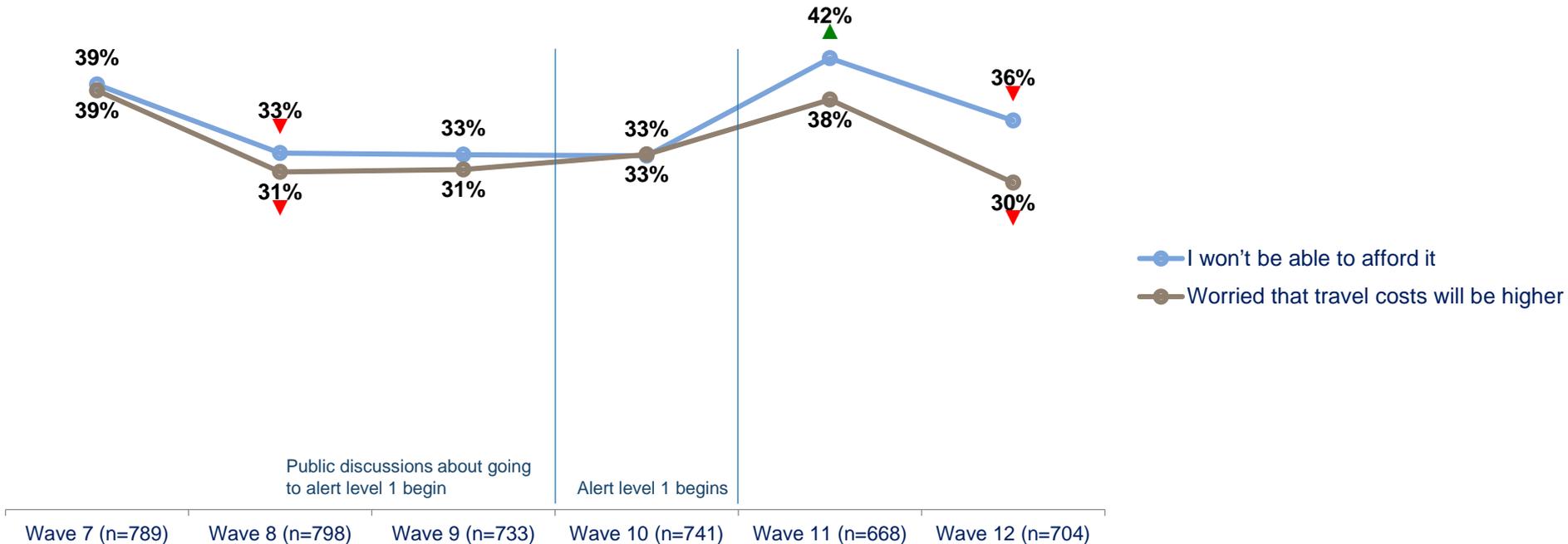


FDT3a. What are the main reasons that you intend to travel less?
Base: all adults 15+ in New Zealand intending to travel less



Comparatively, there has been a significant drop off in those citing costs and affordability issues

Reasons for travelling less – costs & affordability

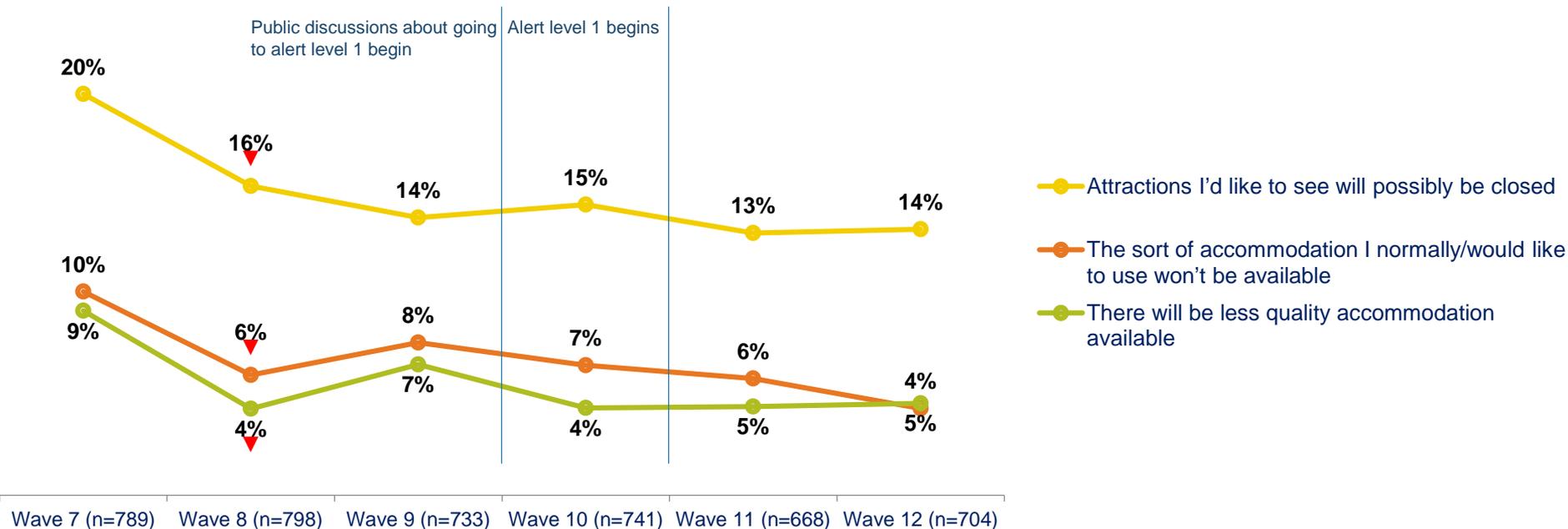


FDT3a. What are the main reasons that you intend to travel less?
Base: all adults 15+ in New Zealand intending to travel less



The availability of accommodation is cited by few as a reason to travel less, although one in seven think that the attractions they'd like to see will be closed

Reasons for travelling less – attractions and accommodation availability

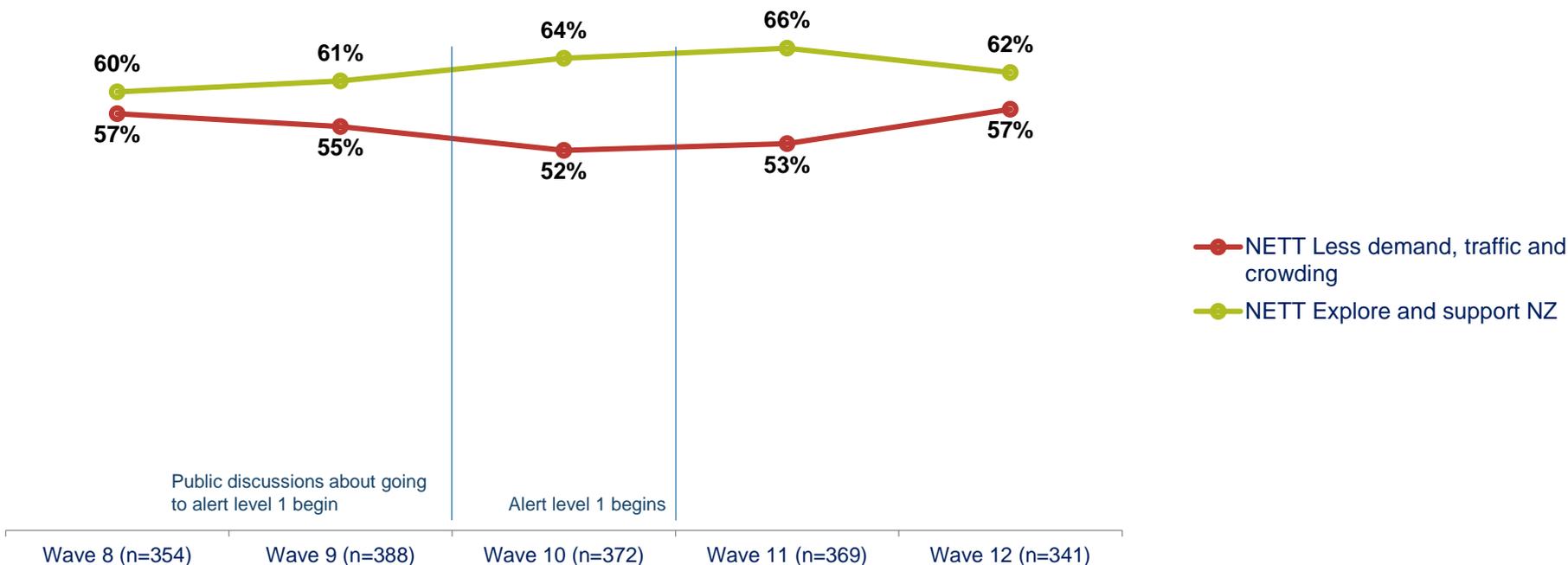


FDT3a. What are the main reasons that you intend to travel less?

Base: all adults 15+ in New Zealand intending to travel less

Among those planning to travel *more*, there has been little variation over time in the themes cited, although perceptions of lessened demand are creeping back up

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



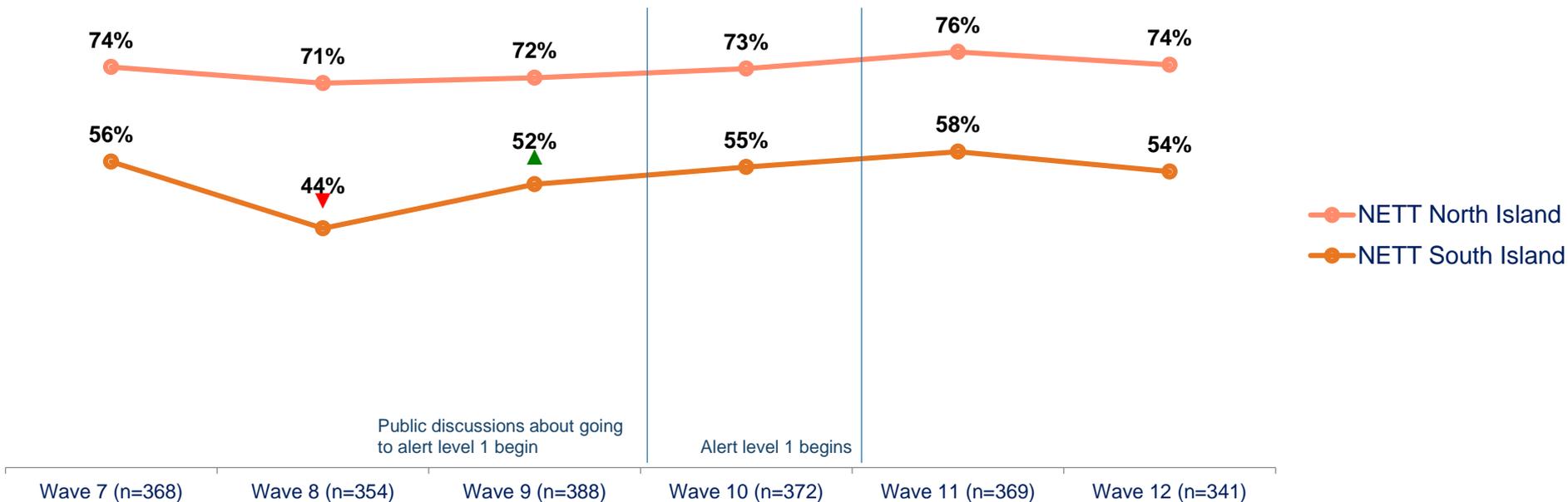
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

A greater proportion plan to travel somewhere in the North Island, with greater variation over time in plans to travel within or to the South Island

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



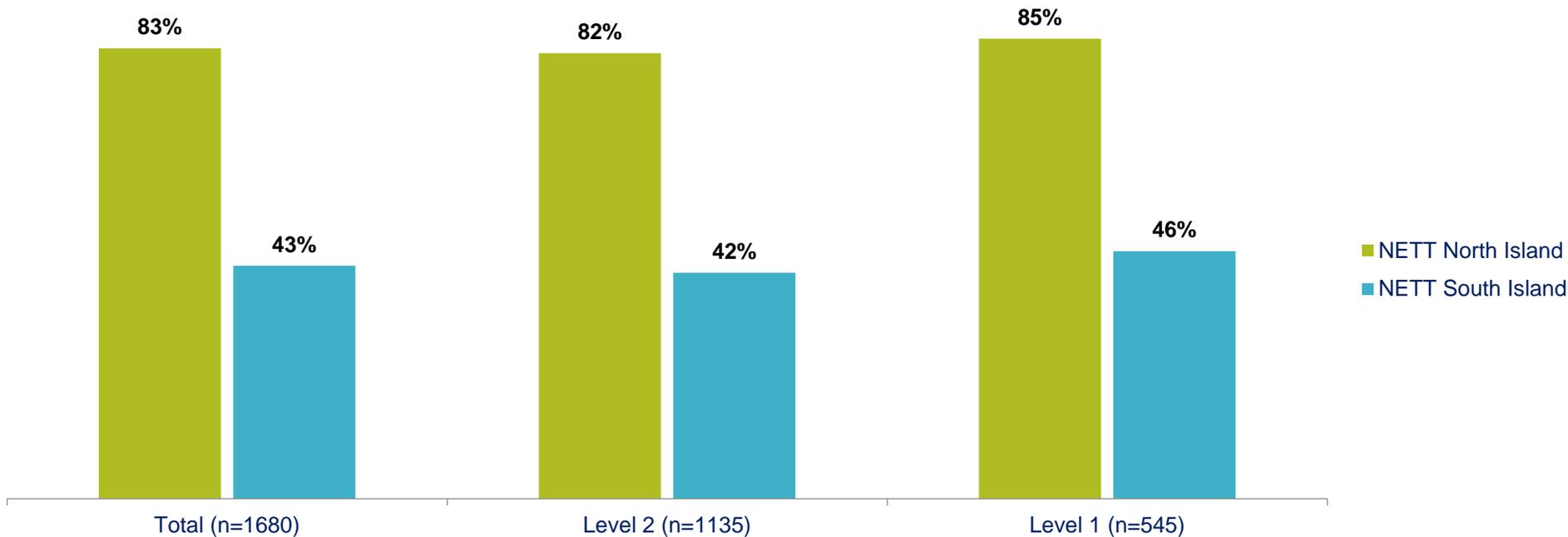
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

The proportion of North Islanders intending to travel within the North Island is double those intending to travel to the South Island

Destination intend on travelling to – North Island residents intending to travel more



FDT4. Where do you think you will travel within New Zealand?
Base: all adults 15+ on the North Island intending to travel more



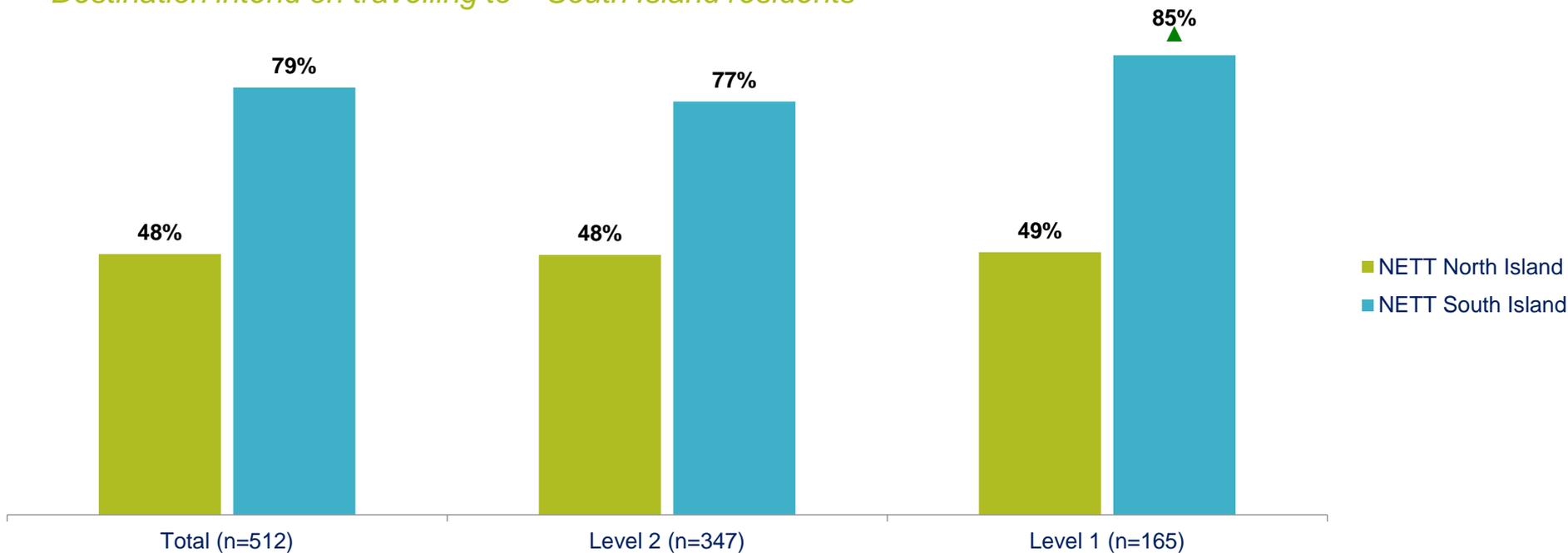
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

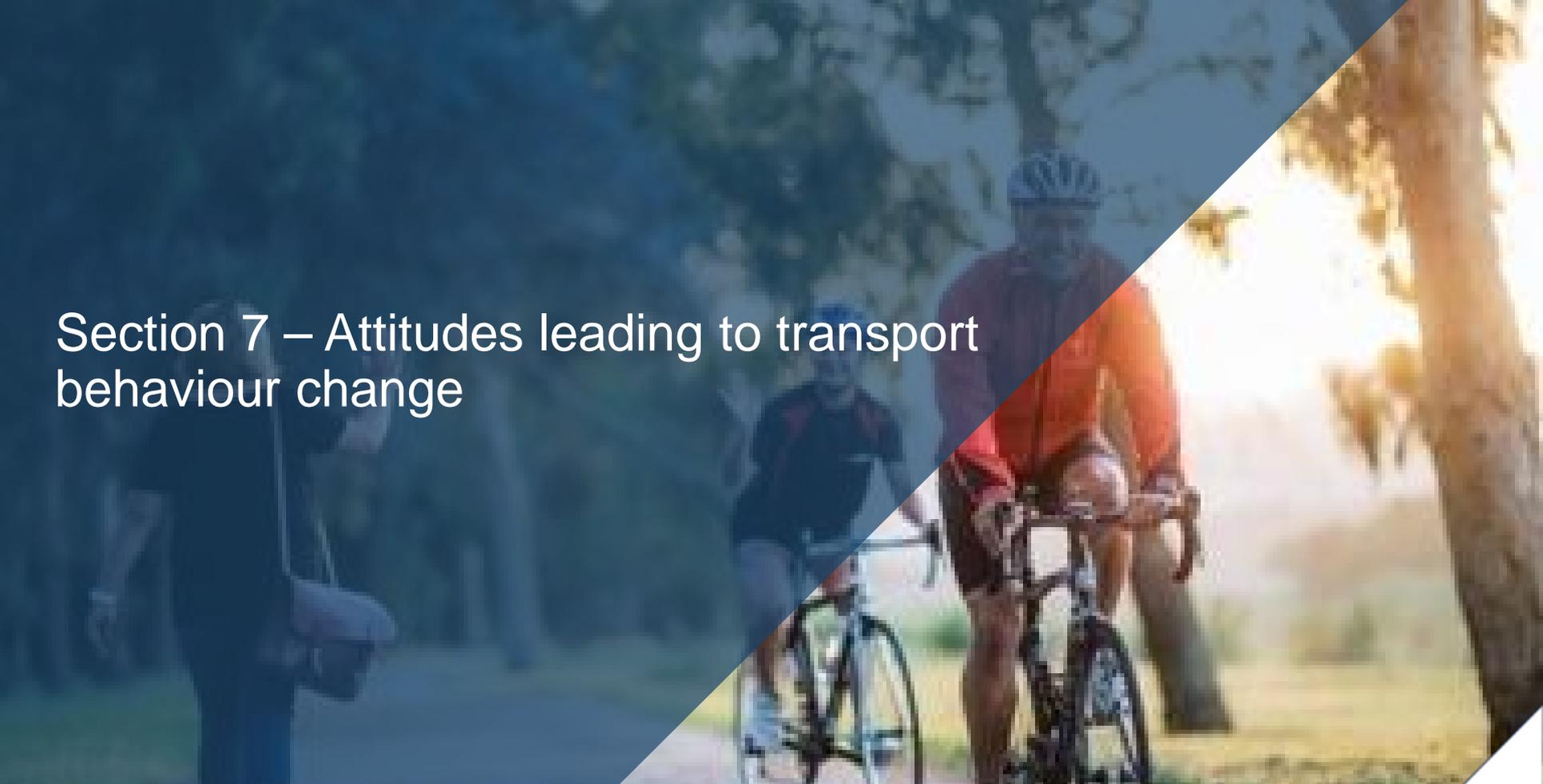
Intention to travel *within* the South Island has increased significantly since level 2, although half are planning inter-island travel

Destination intend on travelling to – South Island residents



FDT4. Where do you think you will travel within New Zealand?
Base: all adults 15+ on the South Island intending to travel more





Section 7 – Attitudes leading to transport behaviour change

Key findings – attitudes

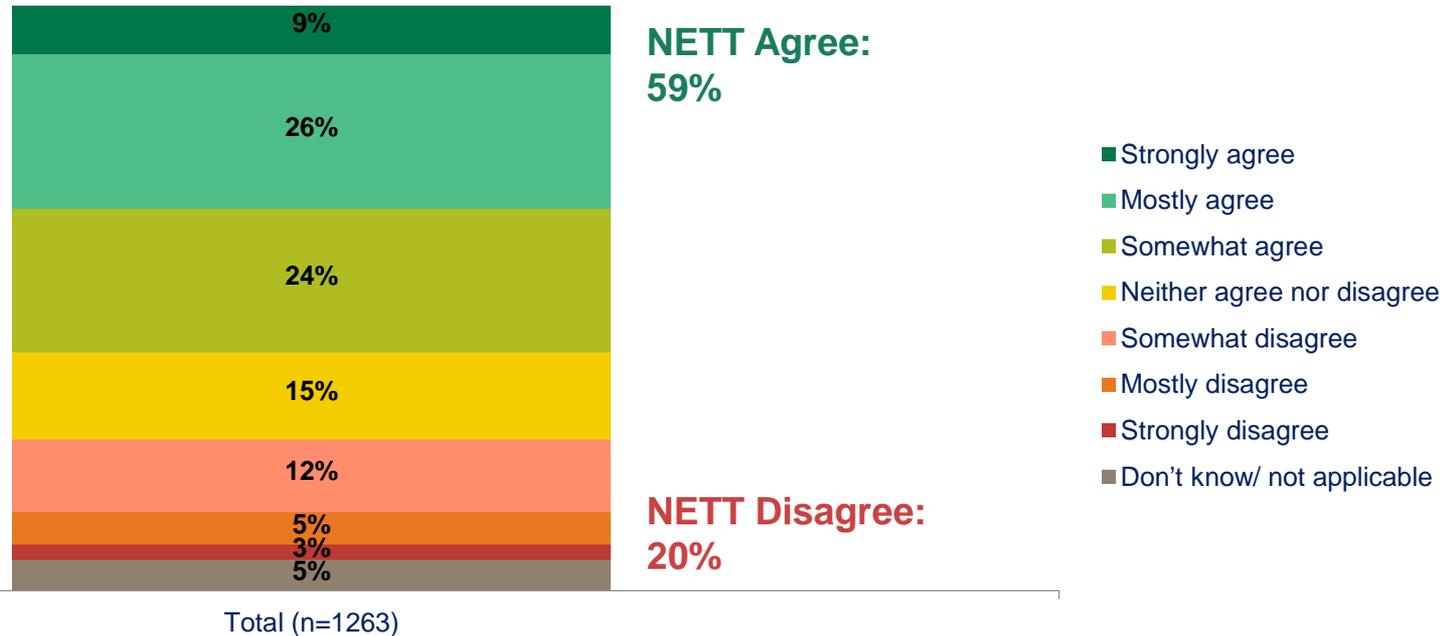
Waka Kotahi objective – understanding behaviour change

- This research has shown that more journeys are being taken as we adjust to level 1 conditions, so it is important to understand the prevalence of certain attitudes in this environment and how those might drive behaviour.
- In wave 12, a new statement was introduced to measure the perceived adherence of others to travel restrictions when displaying COVID-19 symptoms.
- At this point, most people agree that others are following this rule, although there is some variation according to age, with younger people more sceptical of the adherence of others when compared to over 65s.
- There is some directional regional variation, but little significant difference save for variations that may be indicative of the nature of the population within the regions.



Three in five agree that others are following updated guidance, compared to one in five that don't

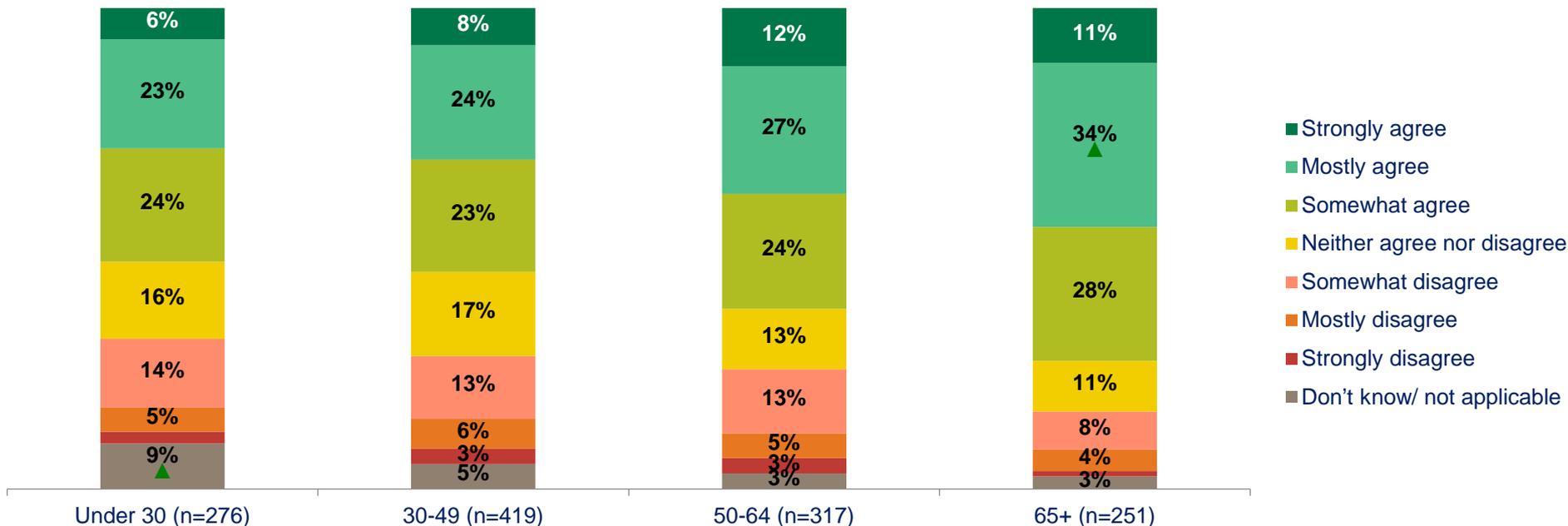
Most people are following guidance around not leaving the house and travelling if they display symptoms



QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
Base: all adults 15+ in New Zealand in wave 12

There is a clear directional difference in agreement according to age, with over 65s much more likely to agree than other age groups

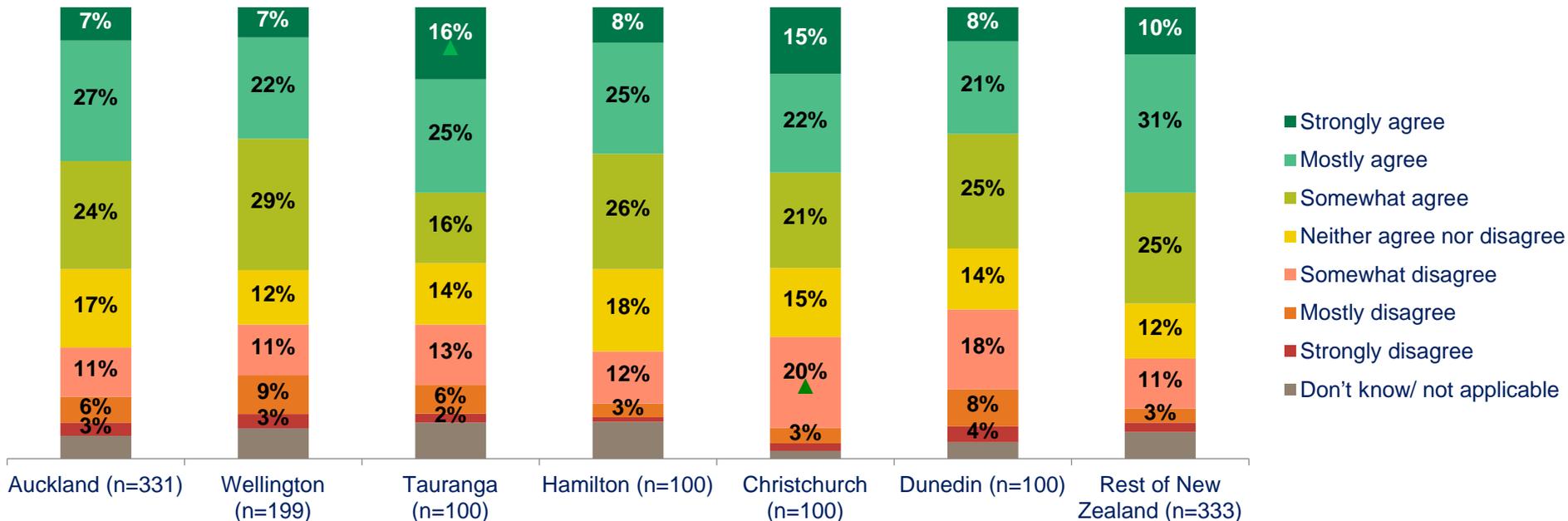
Most people are following guidance around not leaving the house and travelling if they display symptoms



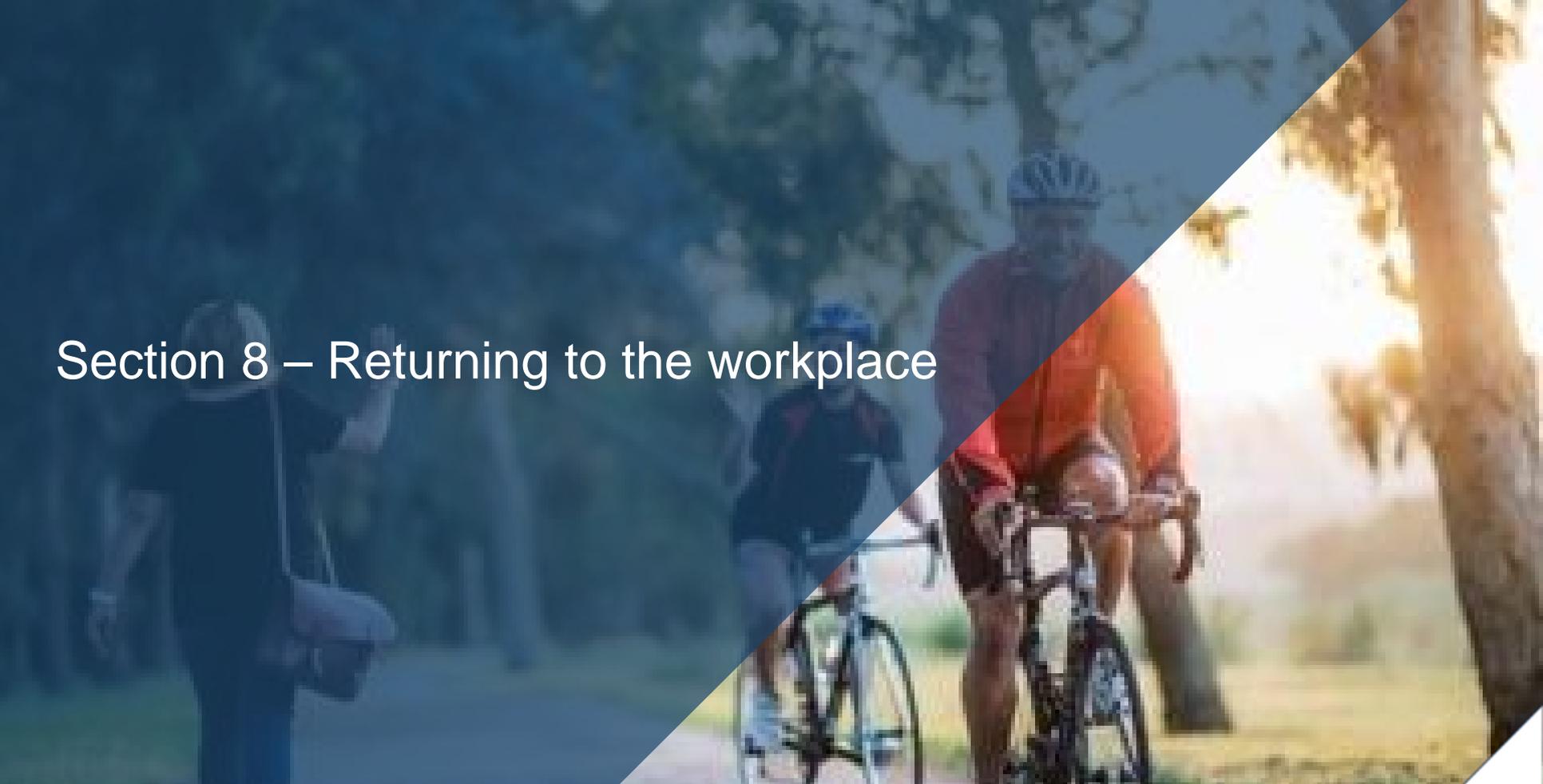
QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand in wave 12

There is some regional variation in agreement, but still too early to be certain if any of significant note

Most people are following guidance around not leaving the house and travelling if they display symptoms



QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand in wave 12



Section 8 – Returning to the workplace

Key findings – working from home

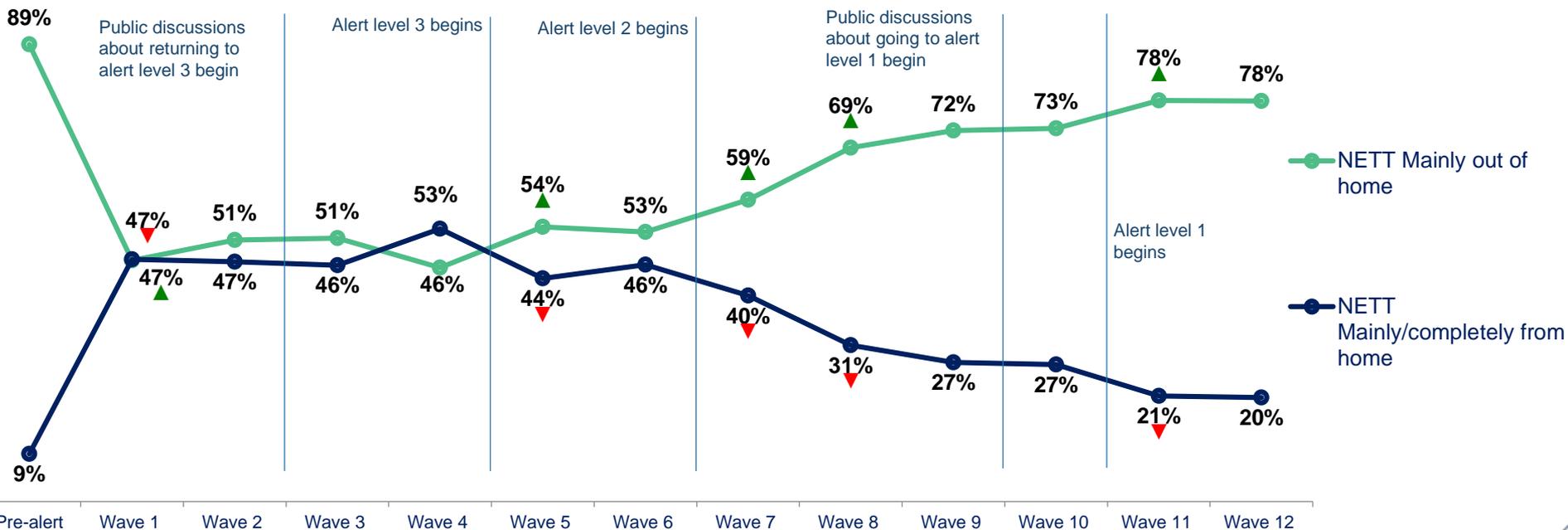
Waka Kotahi objective – understanding behaviour change

- 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.
- The proportion commuting has levelled out during the second week under level 1 conditions, with the majority now commuting to work.
- Close to half of those now travelling to their normal workplace worked from home at some point during the lockdown period.
- A number of work flexibility attitudinal statements were amended this wave to ensure that measurement reflects the current nature of the workplace.
- The majority disagree that they would *only* work from home as a last resort, indicating a great deal of openness to this way of working.
- The majority agree that flexibility around and openness to working from home has in fact increased within their workplace.



There has been a levelling out in the proportion returning to work out of home, with the proportion working from home double the pre-lockdown incidence

Proportion working in and out of home by survey wave



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

Base: all adults 15+ in New Zealand usually working



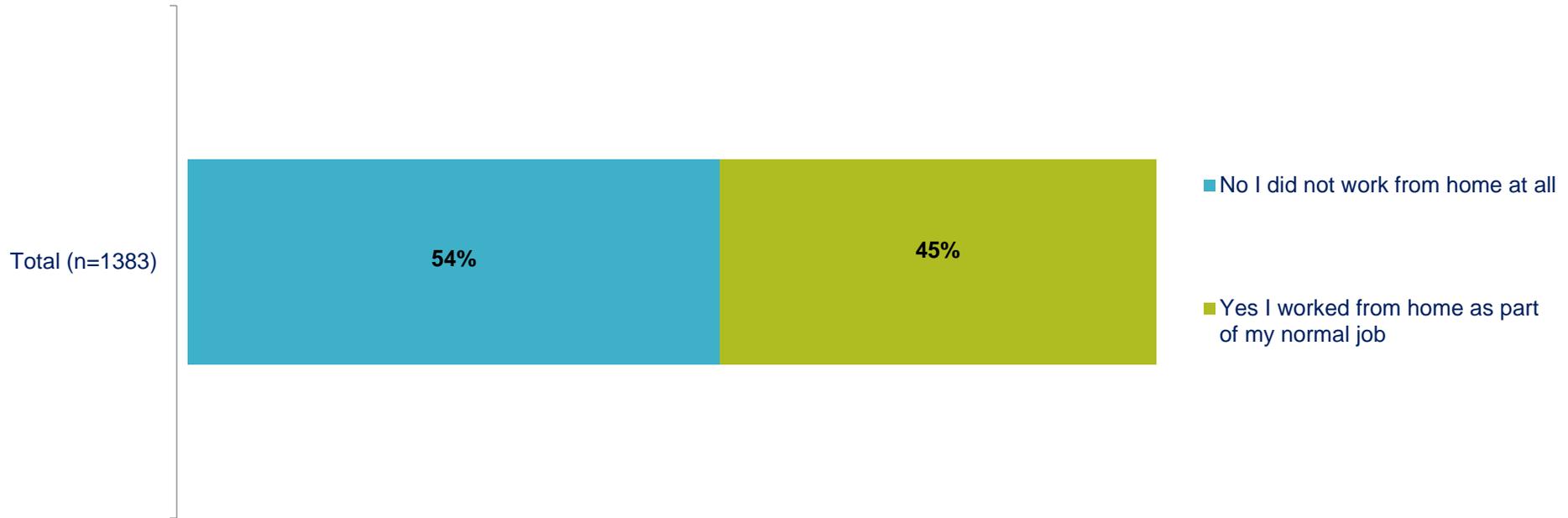
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Of those not currently working from home, just under half said that they did so at some point during lockdown

Lockdown working location of those not working from home



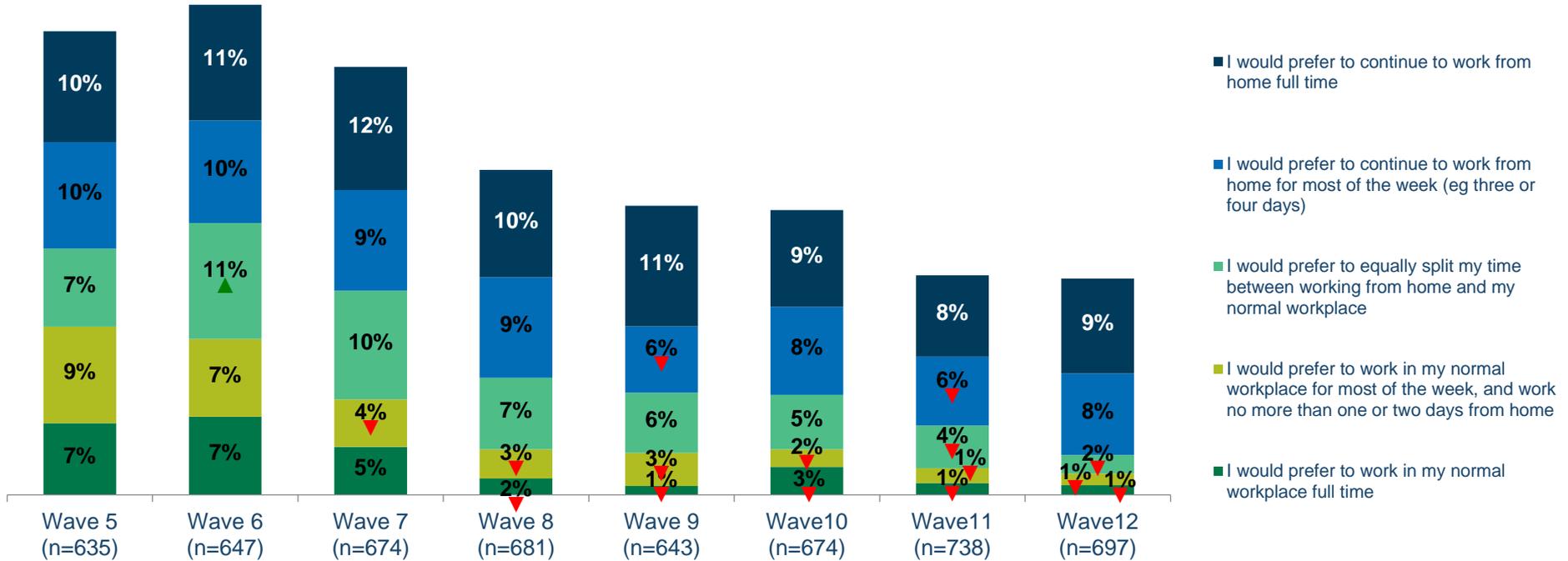
QWORK2C Did you work from home at all during alert levels 4 and 3?

Base: all adults in New Zealand that are not currently working from home in waves 11 and 12



The majority of those still working from home, would prefer to stay working from home, full time or most of the week

Preferred post-lockdown work site by wave



QWORK6B And thinking about the period immediately following the end of the lockdown, when everyone is permitted to return to the workplace. Which of the following applies to you?
 Base: all adults in New Zealand that are working



Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

A majority of workers indicate that their workplace has changed or become more flexible about working from home

Working from home attitudes

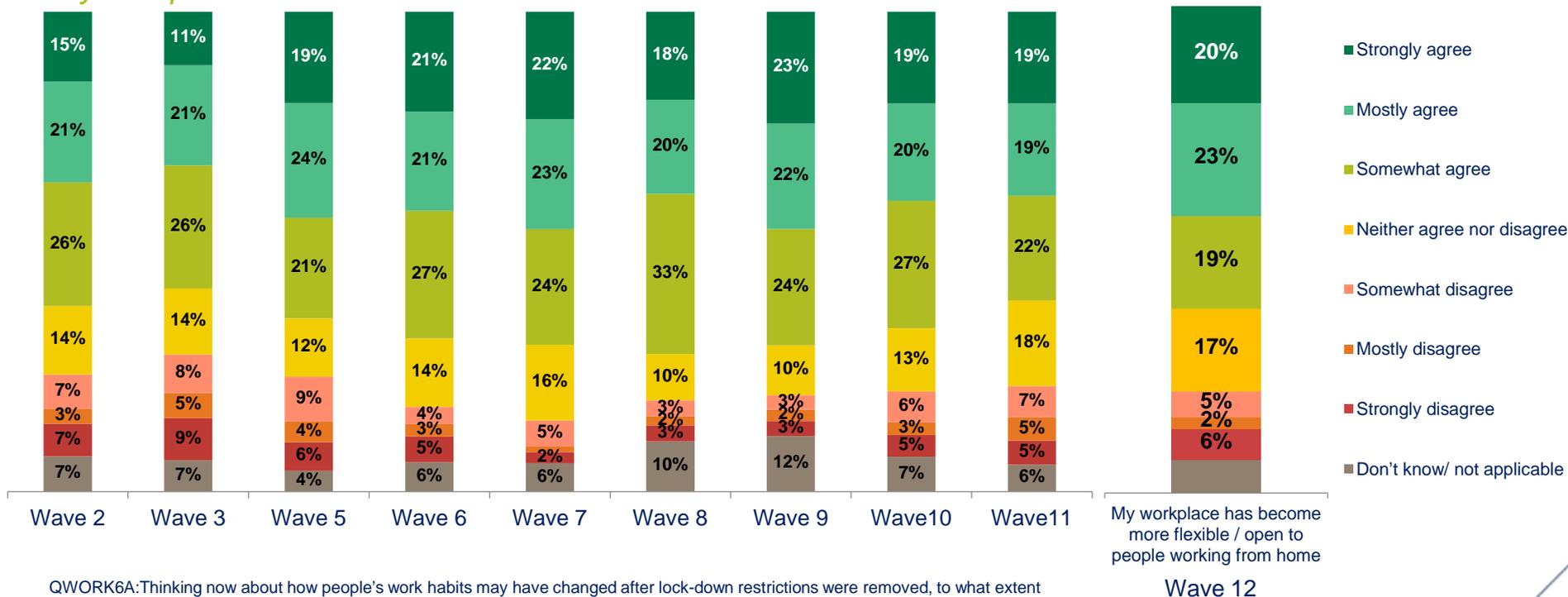


QWORK6A: Thinking now about how people's work habits may have changed after lock-down restrictions were removed, to what extent do you agree or disagree with the following statements?

Base: New Zealanders currently working from home or those who worked from home during level 4 or level 3 (n=378)

Perceptions around flexibility have not shifted a great deal since the start of level one and the amended statement appears to illustrate this continued trend

“My workplace will/has become more flexible”



QWORK6A: Thinking now about how people's work habits may have changed after lock-down restrictions were removed, to what extent do you agree or disagree with the following statements?

Base: New Zealanders currently working from home or those who worked from home during level 4 or level 3 (n=378)

