

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–13 weekly core report

30 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

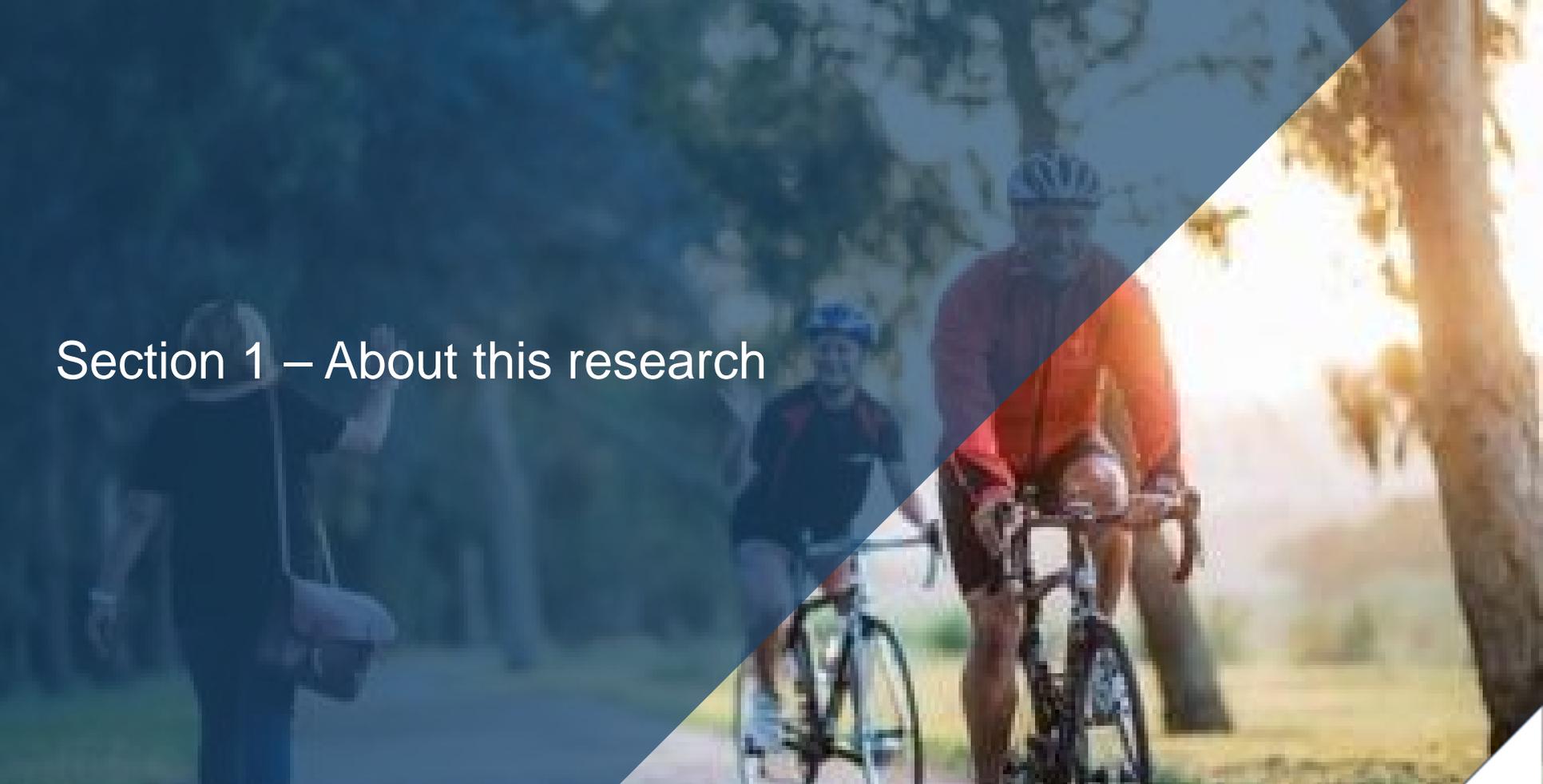
While Waka Kotahi provided investment, the research was undertaken independently, and the resulting findings should not be regarded as being the opinion, responsibility or policy of Waka Kotahi or indeed of any NZ Government agency.

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

Report content

COVID-19 transport impact

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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 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 thirteen 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, and combined waves 11, 12, and 13 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 13 report is based on a statistically significant shift of results between waves 1 to 13, 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 alert results to date.
- 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	
13	Thursday 25 June to Sunday 28 June	

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 – 13	
		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=3,794	1.59
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=854	3.35
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=300	5.66
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=300	5.66
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=602	3.99
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=301	5.65
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=307	5.59
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=1,130	2.91
Disability, Vulnerability and COVID-19**									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=433	4.71
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=824	3.41
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=443	4.66

*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.

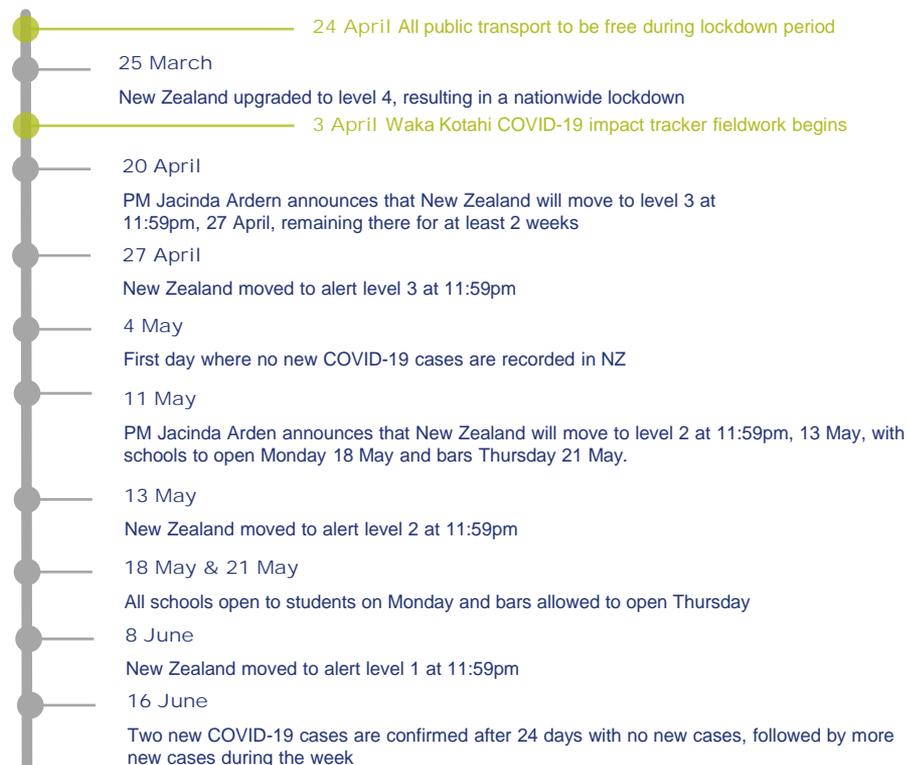
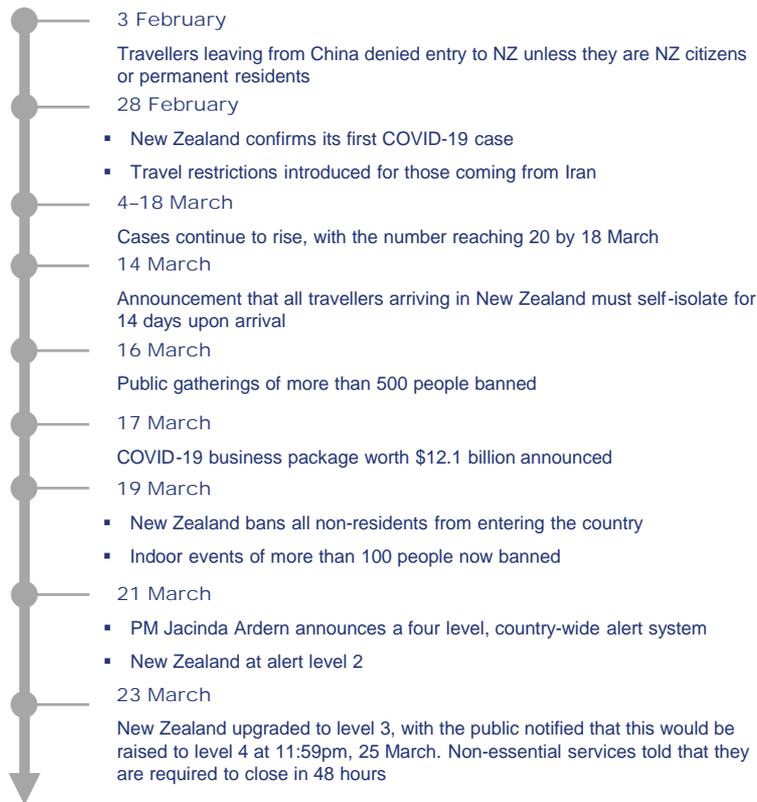
Active modes: refers to walking (of at least 10 mins) and cycling, including e-bikes.

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



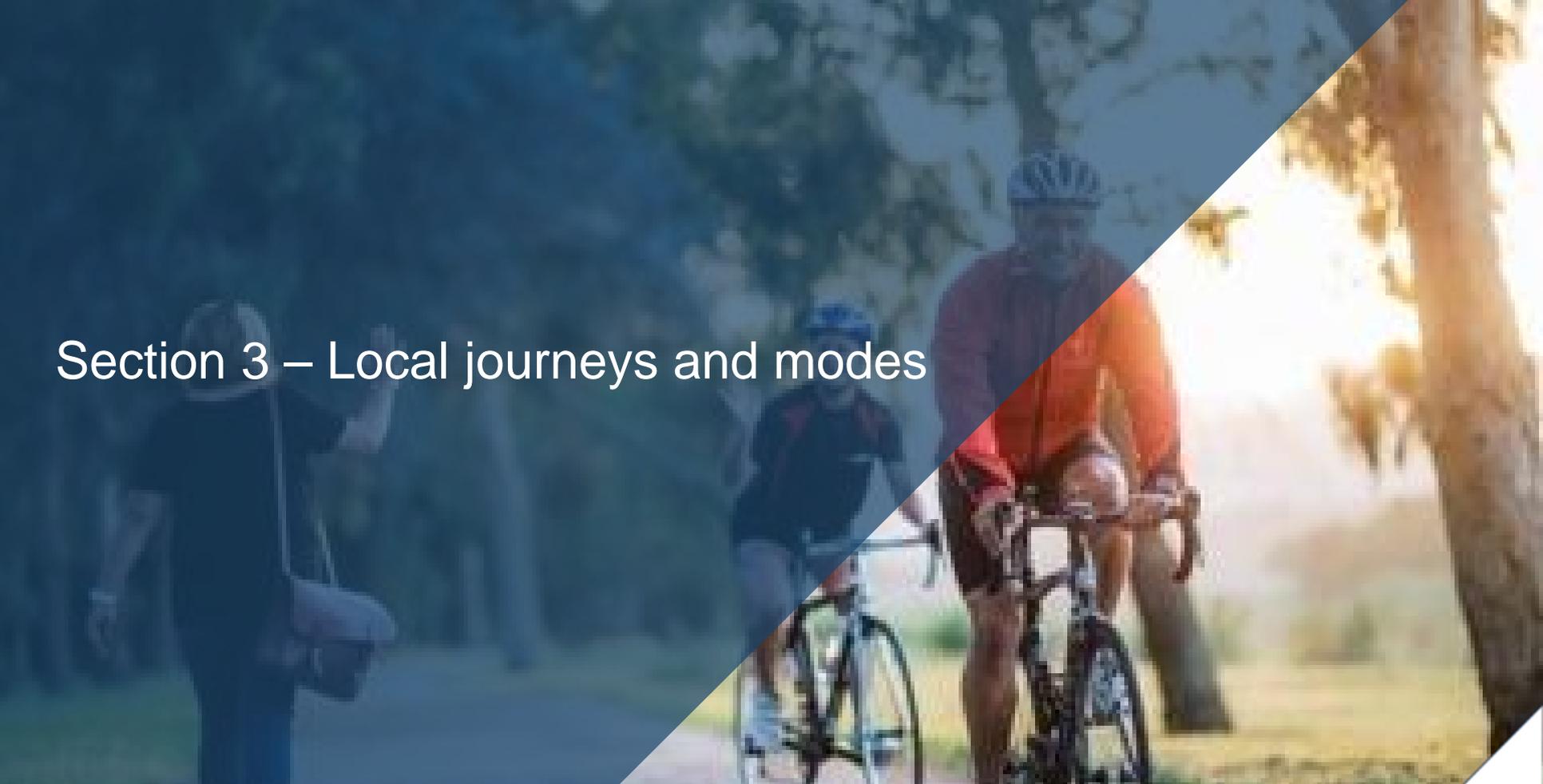


Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–13

Waka Kotahi COVID-19 transport impact tracker

- Wave 13 of fieldwork is the third under level 1 conditions. Wave 12 had seen a number of new COVID-19 cases reported, which was accompanied by an increase in the level of concern cited around transmission and infection. This concern remains at a higher level in wave 13 and has not abated as more new cases emerge.
- Travel activity is continuing to return to normal and, although a small minority are still self isolating in level 1, as many as two in five say they are travelling as they normally would.
- Local journeys continue to increase in level 1, with more than half returning to the workplace in wave 13.
- The proportion claiming to use public transport at least once a week has remained stable, but there has been a statistically significant increase in the proportion claiming to have travelled by train or ferry in the last week. **Note that this does not reflect the volume of trips being made, just the proportion travelling at least once in a seven-day period.**
 - Former users currently continue to cite reduced need as the major theme for their usage reduction, ahead of COVID-19 transmission concerns.
 - There has been an increase in the proportion saying they'll return to public transport once congestion and parking charges make driving less feasible.
 - There's been a statistically significant drop in stated weekly active mode travellers, driven by a decrease in those walking at least once a week during generally harsher weather conditions.
- Non-essential local journeys have not increased during wave 13, which has been the case throughout level 1.
- Inter-regional domestic journeys continue to be less common than they were at the wave 10 peak, primarily because of lower levels of visits to friends and family, but there have been directional increases in claimed work trips.
- When it comes to domestic tourism, there has been something in a switch in the proportions expecting to travel more or less for each reason, with a negative NETT growth in the proportion expecting to visit friends & family but a positive shift for work, education and conference trips.
- The increase in COVID-19 transmission and disruption concerns that accompanied wave 12 has held into wave 13, with similar proportions giving these as reasons for expecting to travel less.
- During lockdown, New Zealanders claim to have taken advantage of online delivery and click & collect services to complete purchases in less routine categories, such as appliances and electronics. However, looking forward to a post-lockdown environment there is a stated intention to make these purchases more locally in physical stores, rather than shopping for them online.
- For the first time those who can but do not work from home were asked about attitudinal positions relating to this theme. The inclusion of these people indicates that within the general working population, capability and opportunity are not as strong as they are in the population still working from home, although *motivation* to gain the option to work from home remains quite robust overall.

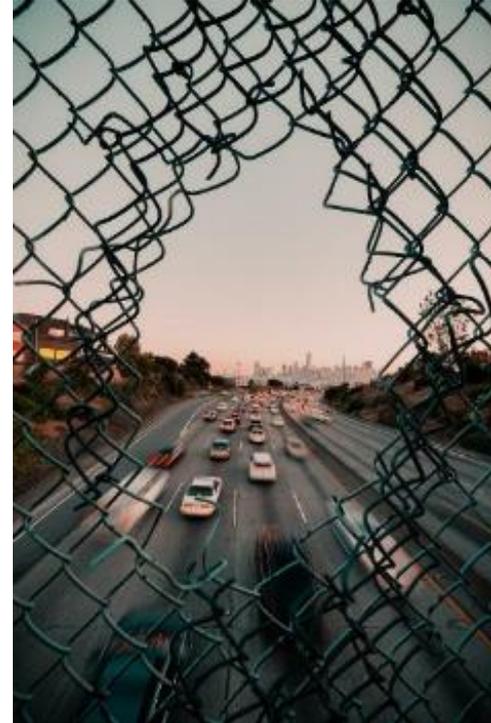


Section 3 – Local journeys and modes

Key findings – local journeys and modes

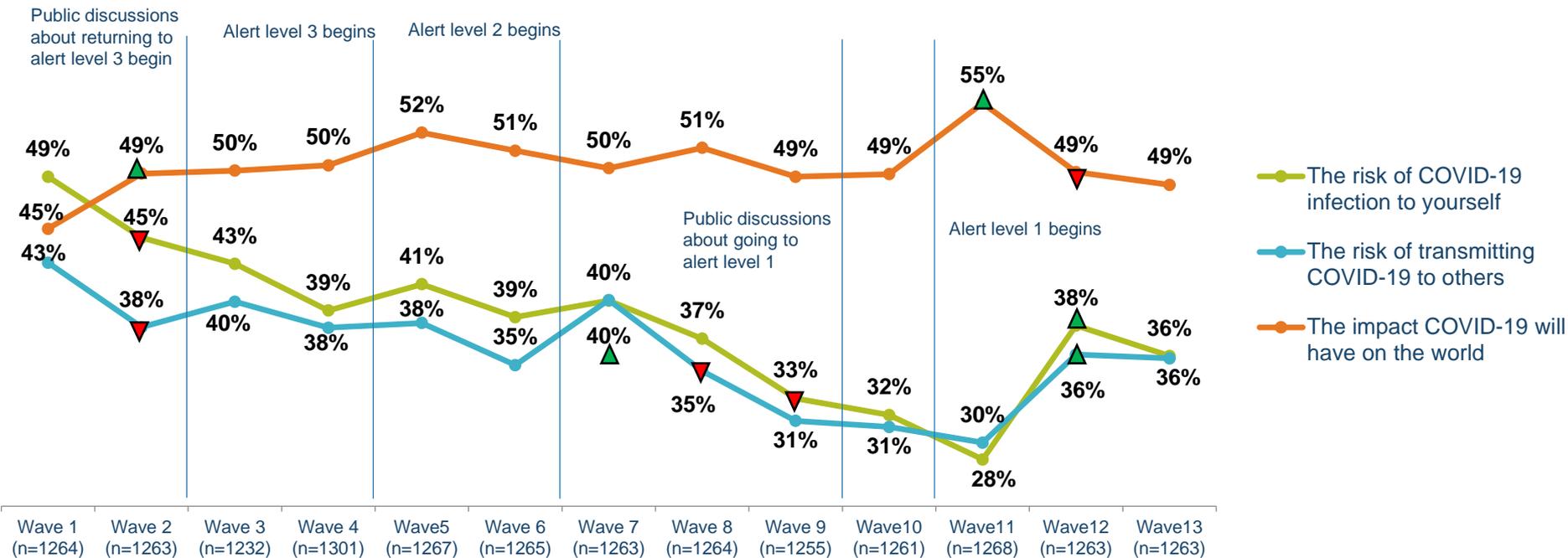
Waka Kotahi objective – how is travel changing?

- 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.
- In wave 12, the announcement of new COVID-19 cases coincided with an increase in stated concern about transmission, which has held through in to wave 13.
- There has been a consistent statistically significant increase wave-on-wave in those who say that they are travelling much as they normally would, but it is still the case that a core of roughly one in five are at least partially self-isolating and not travelling for anything other than essentials.
- For a number of journey types, the proportion travelling continues to recover, with a clear trend of people returning to the workplace during level one.
- There has been a continued decline in active mode travel, coinciding with harsher winter weather and chiefly driven by a decrease in those walking for travel which is not offset by the small directional increase in those cycling.
- In public transport, there has been a significant increase in weekly users of trains and ferries for the first time in a number of waves.



COVID-19 transmission concerns have maintained a high level following a significant increase in wave 12

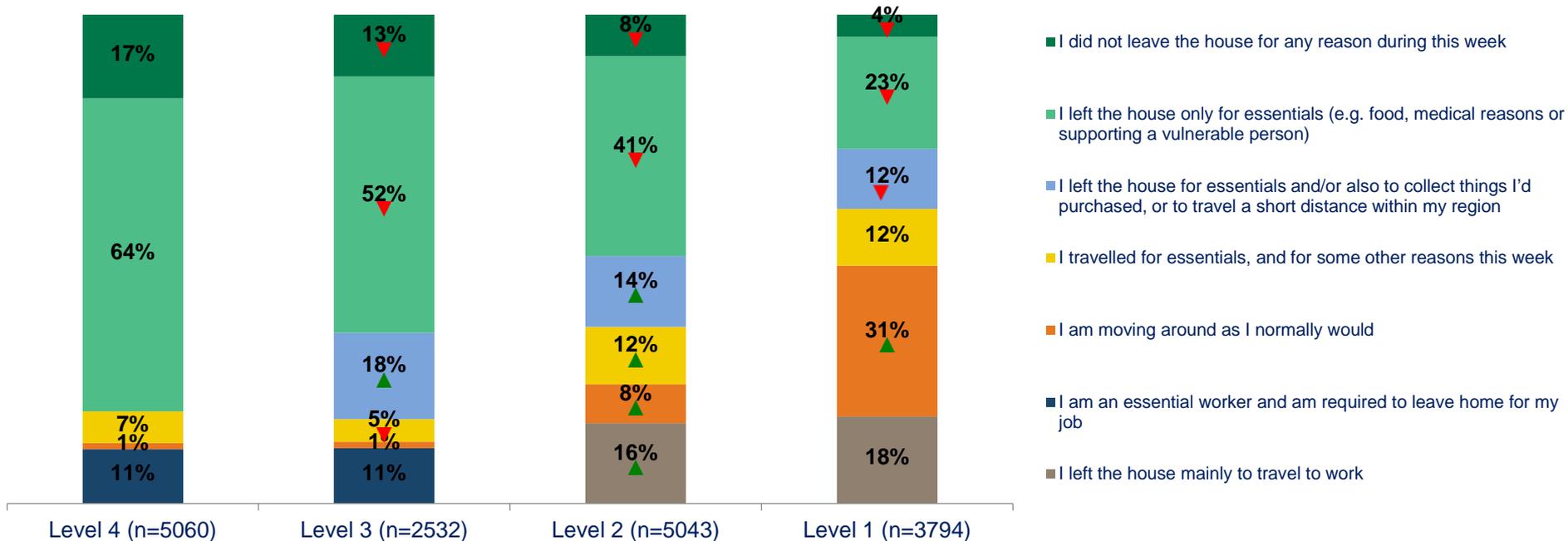
COVID-19 concerns (NETT all concerned)



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

In level 1, three in 10 say that they are moving around as they normally would

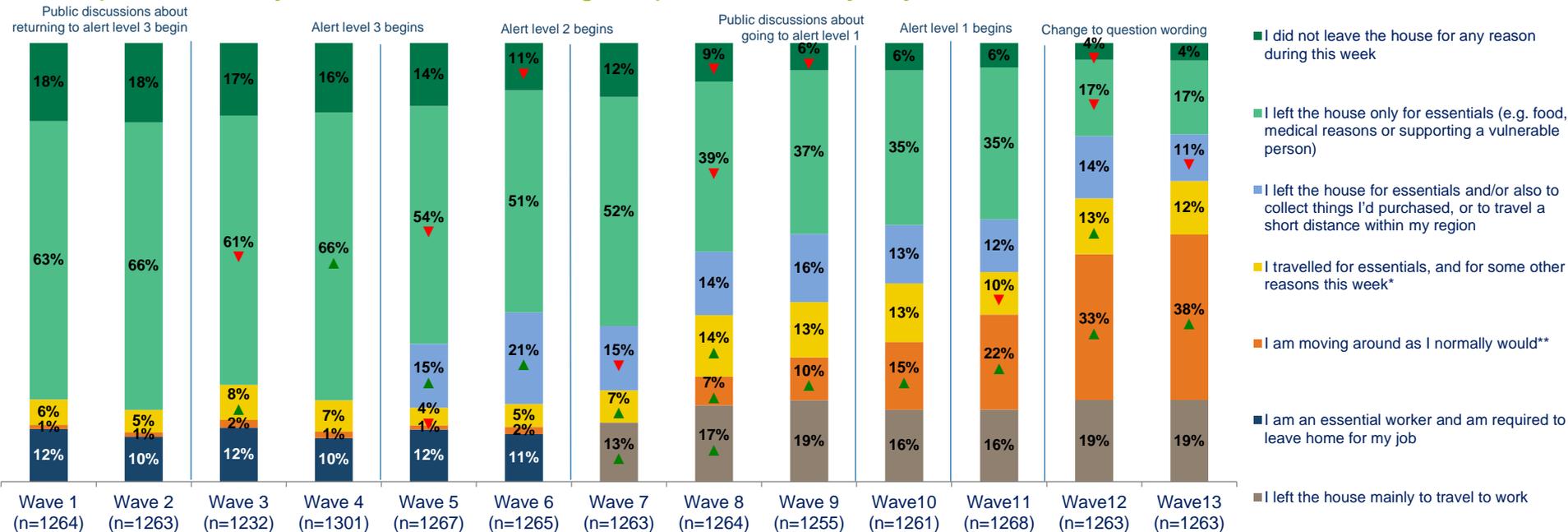
Reported activity and movement during the past seven days by alert level, excludes exercise



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

Following a wording change in wave 12, the proportion still self isolating dropped to roughly one in five

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



*until week 12: "(e.g. visiting someone outside of my bubble, visiting another region), from week 12: (e.g. visiting friends and family, visiting another region)"

**from week 12: "i.e. with no restrictions"

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



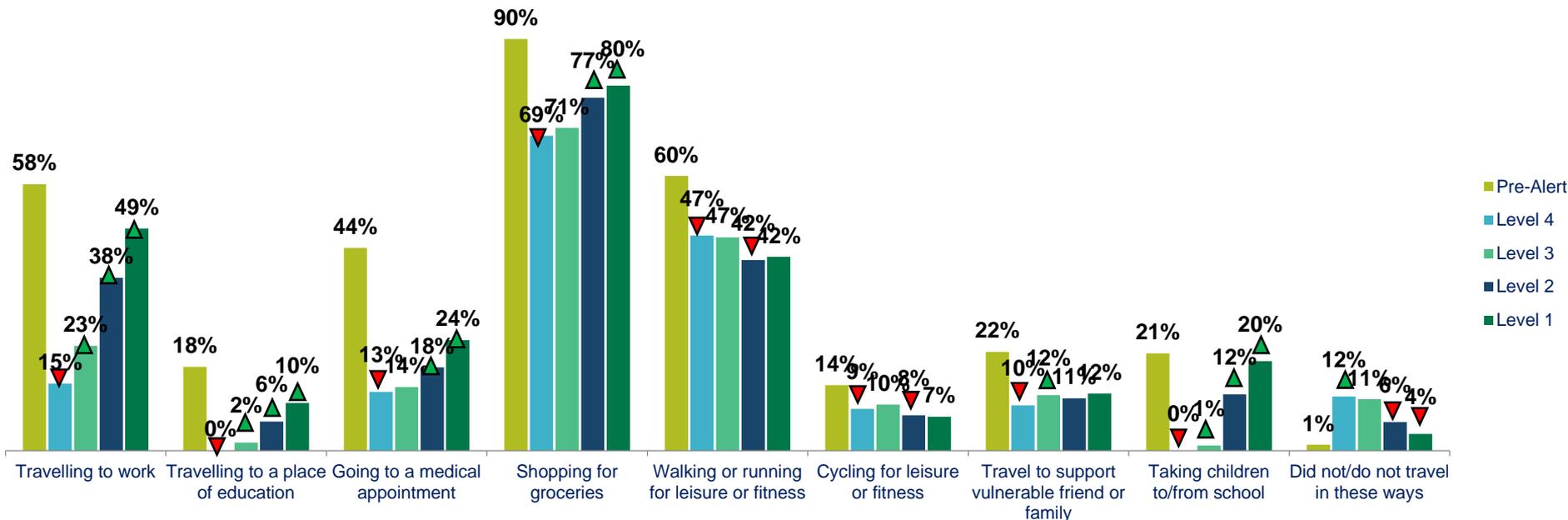
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Most journeys are increasing, with nearly half travelling for work, and four in five making a grocery shopping trip

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



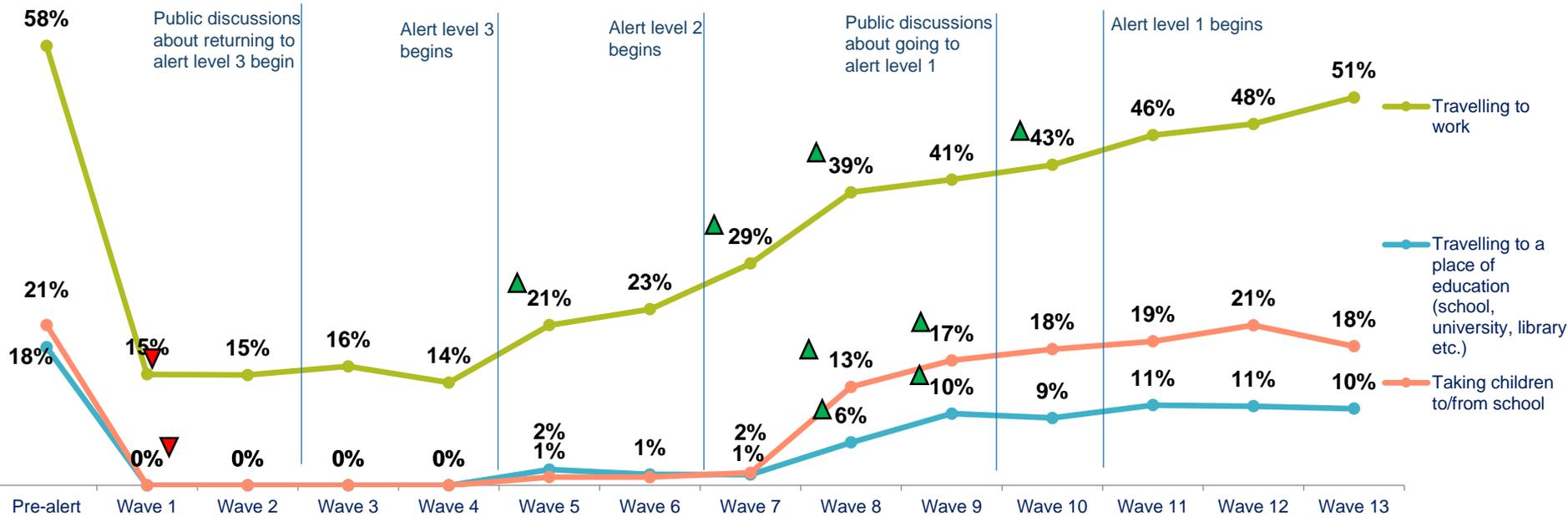
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

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 travelling for work is greater than half for the first time, although still seven points short of the pre-alert levels

Reported activity and movement during the past seven days by wave



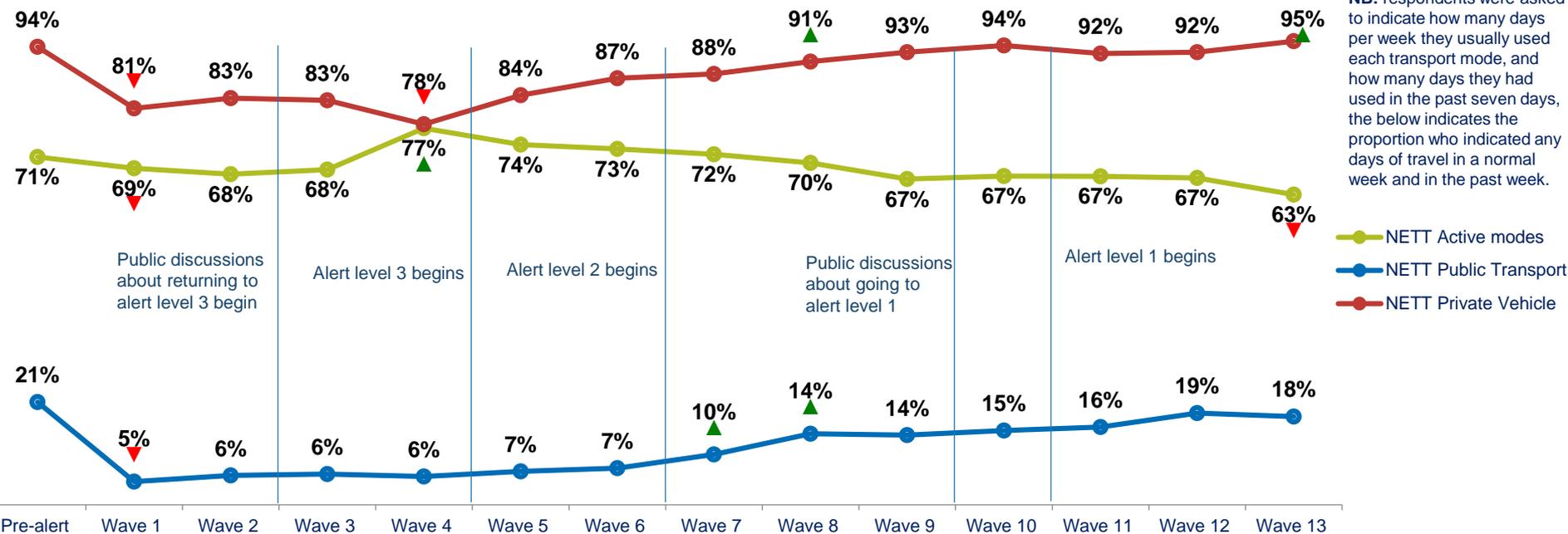
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)?/And which, if any of the following types of journeys did you make during the last seven days?

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), wave 13 (n=1,263)

There's been a statistically significant drop in weekly active mode travel during the most recent wave, with weekly public transport usage holding stable

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.

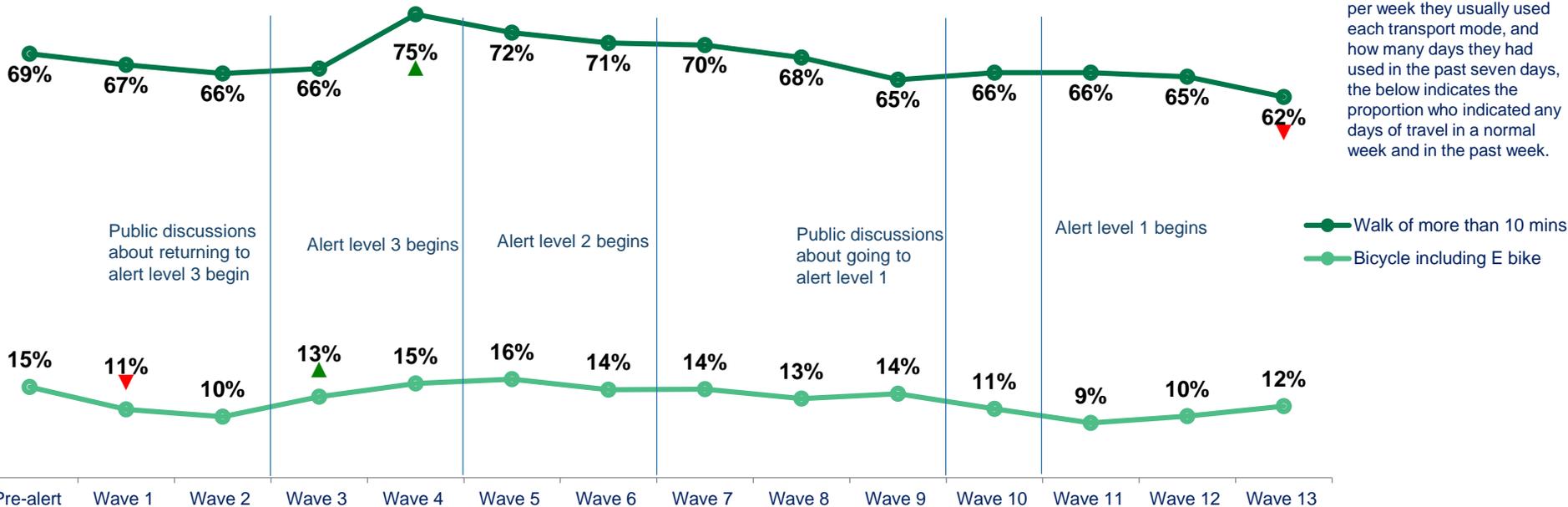


QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would 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); wave 13 (n=1,263)

The drop in active mode travel is chiefly driven by a drop in the proportion walking at least once a week

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.

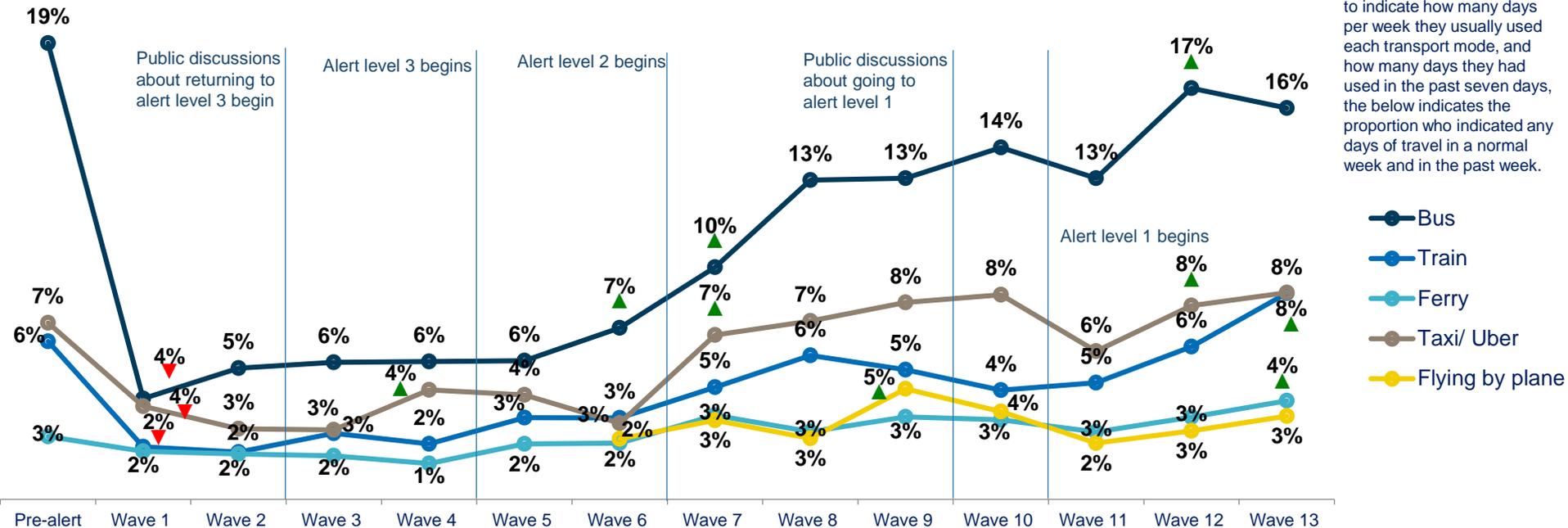


QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would 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); wave 13 (n=1,263)

The big changes in public transport travel have been in the proportion travelling at least once a week by train or ferry, with bus and taxi usage remaining stable

Changes in mode usage by wave

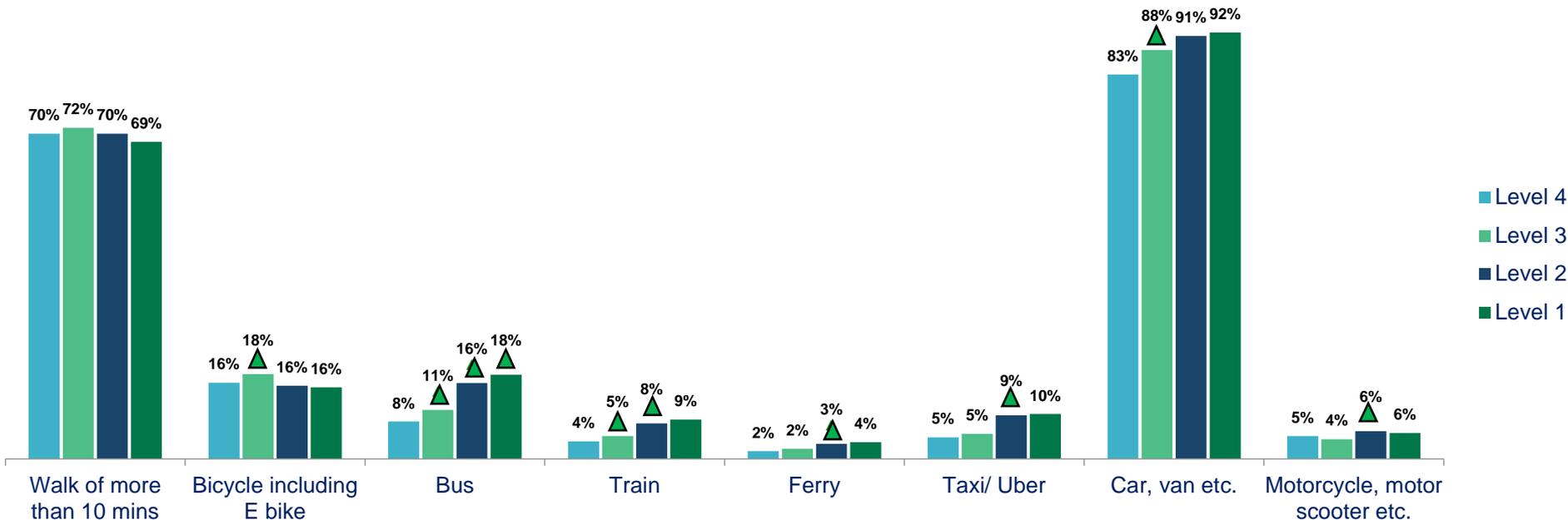
NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.



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); wave 13 (n=1,263)

Buses are now the only mode to have a statistically significant increase in consideration during level 1 fieldwork

Mode consideration: coming week by alert level



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

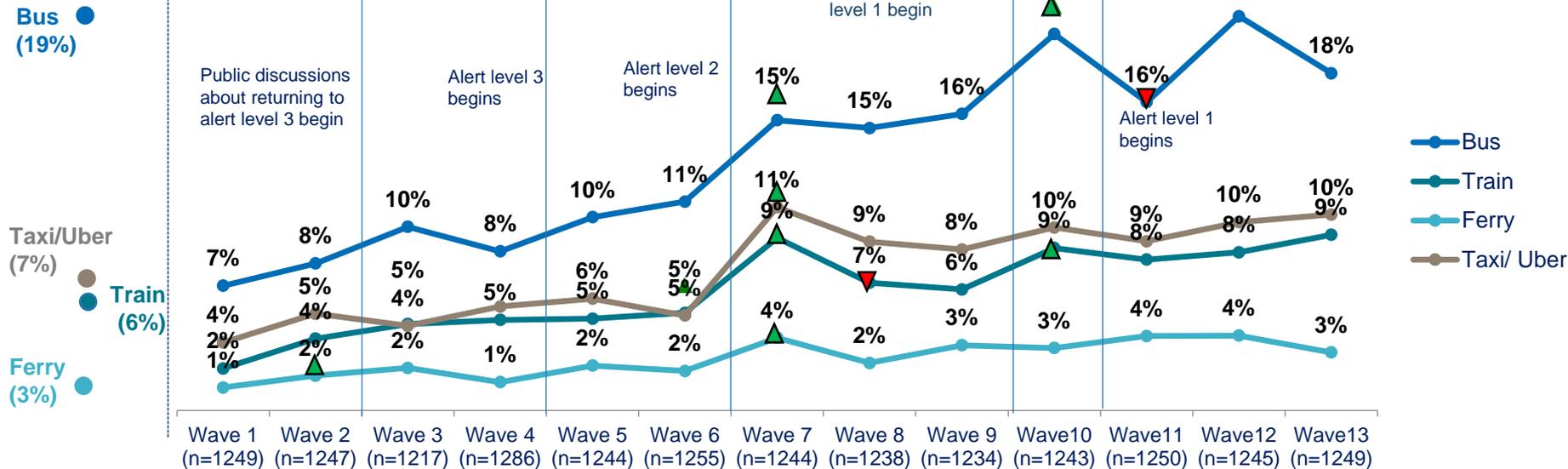
Base: all adults 15+ in New Zealand who normally travel; level 4 (n=4,999), level 3 (n=2,499), level 2 (n=4,959), level 1 (n=2,495)



Although it has varied somewhat in level 1, bus consideration has made it to levels comparable with pre-alert usage

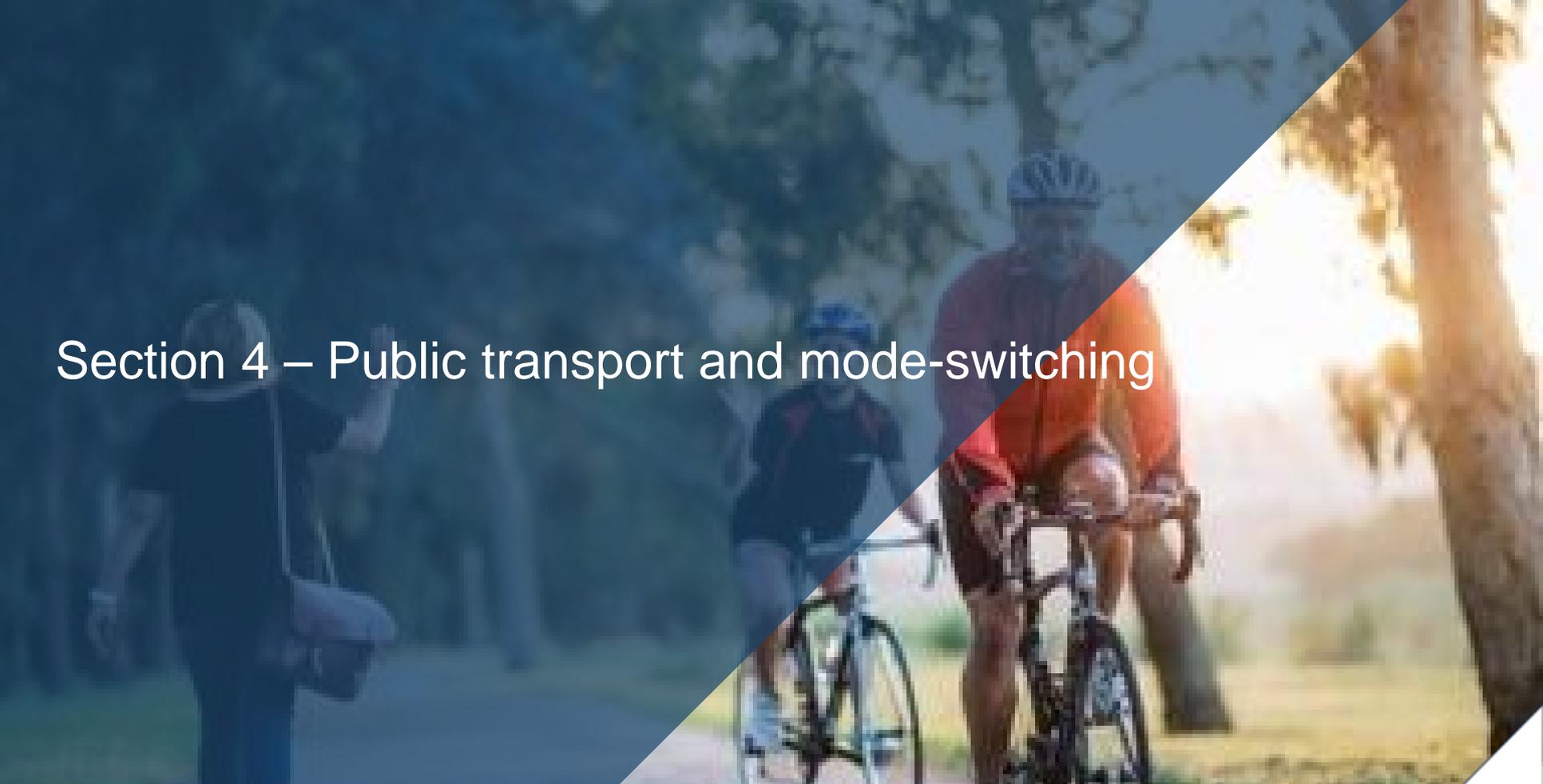
Mode consideration: coming week by wave

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), wave 13 (n=1,249)

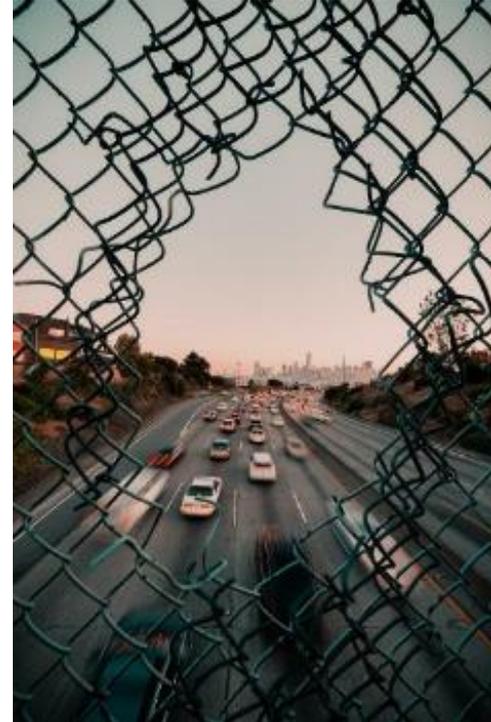
A photograph showing a person walking on the left and two cyclists on the right, all on a path. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is dark blue, and the lower-right portion is a lighter, natural color. The text 'Section 4 – Public transport and mode-switching' is overlaid in white on the dark blue area.

Section 4 – Public transport and mode-switching

Key findings – Public transport and mode-switching

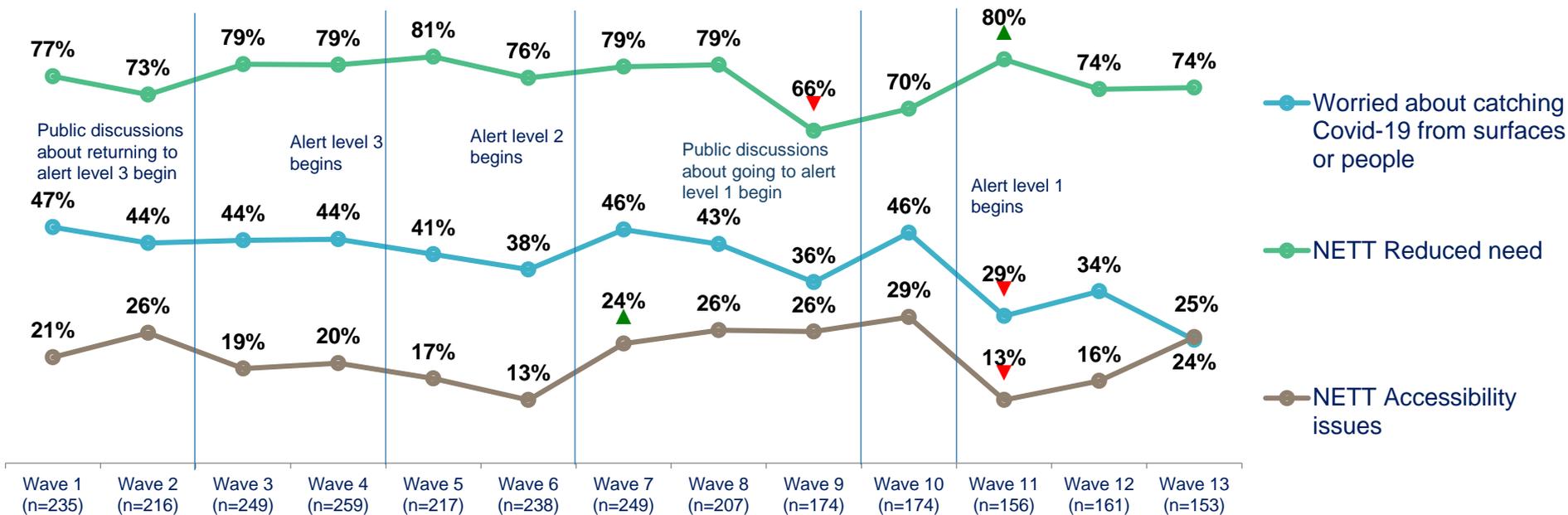
Waka Kotahi objective – why is travel changing?

- 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.
- At this point, the proportion of people using public transport at least once a week has recovered almost to pre-alert levels with a recent increase in train and ferry usage.
- Among those not yet returning to normal rates of usage, reduced need is by far the dominant thematic barrier, with COVID-19 transmission concerns some way behind and dropping during level one.
- There's been an increase during the most recent wave in those saying that they will return to public transport once barriers to driving and cycling return. Biggest among these barriers are road congestion and having to pay for parking again.
- Among those switching commuting modes, environmental factors like weather have become more salient and are cited almost as much as the easier nature of the commuting mode they have switched to.
- Thematically, commuters have a much wider range of reasons for switching from public transport to another mode, but formerly active mode commuters are more likely to cite weather related factors.



Even in the context of heightened COVID-19 concerns, worries about transmission on public transport are far behind reduced need as a reason for reducing usage

Reasons for decrease in public transport usage



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



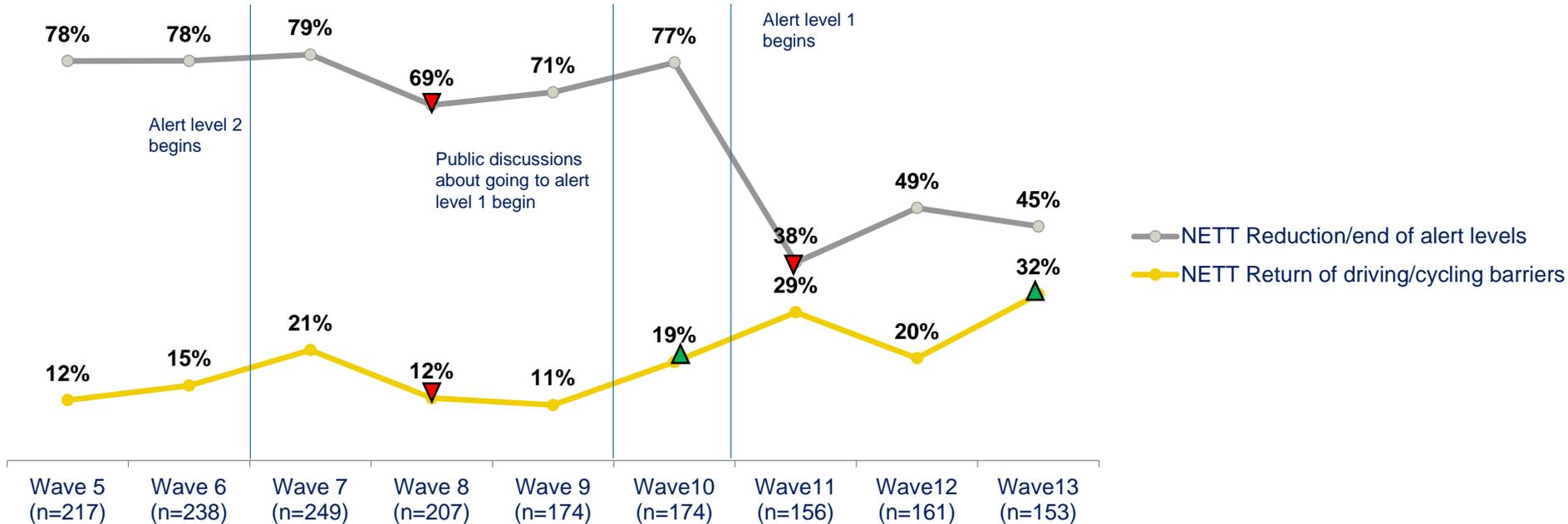
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

There has been a significant jump in the most recent wave in the proportion saying that they will return to public transport once barriers to driving or cycling return

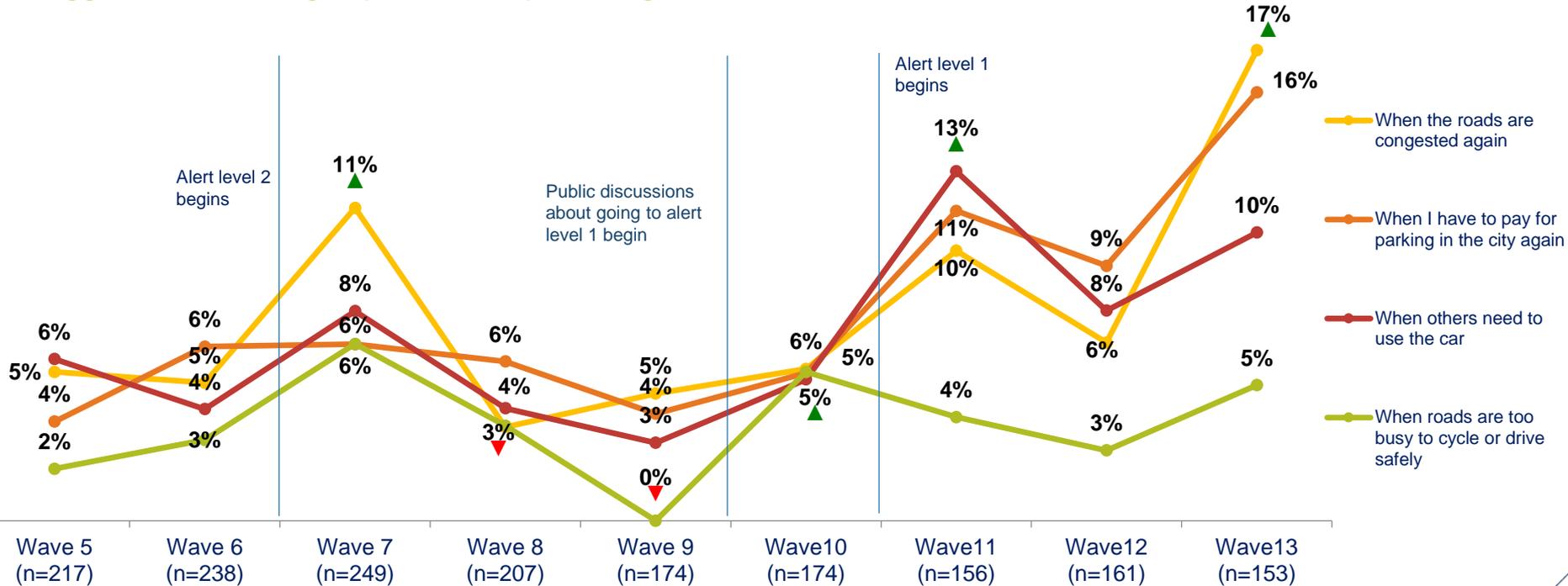
Triggers for returning to public transport usage in the future



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

At this point, one in six of those with decreased public transport usage say they'll return to buses, trains and ferries when the roads are congested again

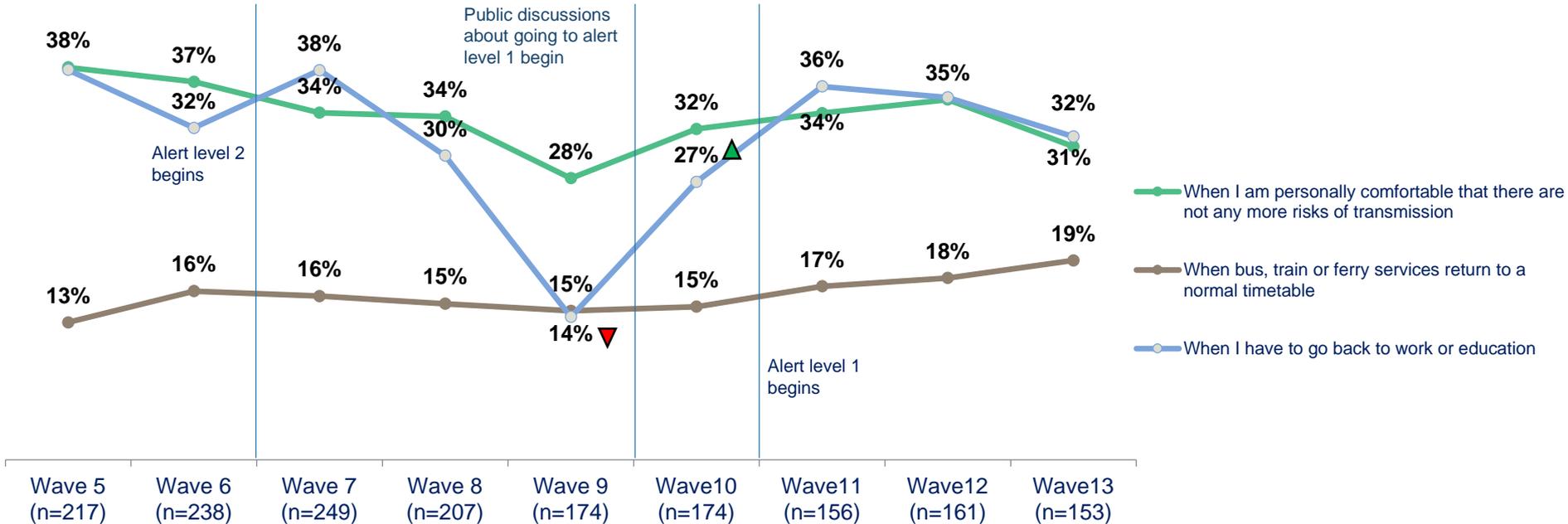
Triggers for returning to public transport usage in the future



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

Some individual factors have increased as cited triggers during level 1, particularly those saying they will return when they need to go back to work or education

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

Of those changing modes, there are three drivers cited by about one in five of those who are changing modes which are convenience and environmental factors

Reasons for changing commute mode



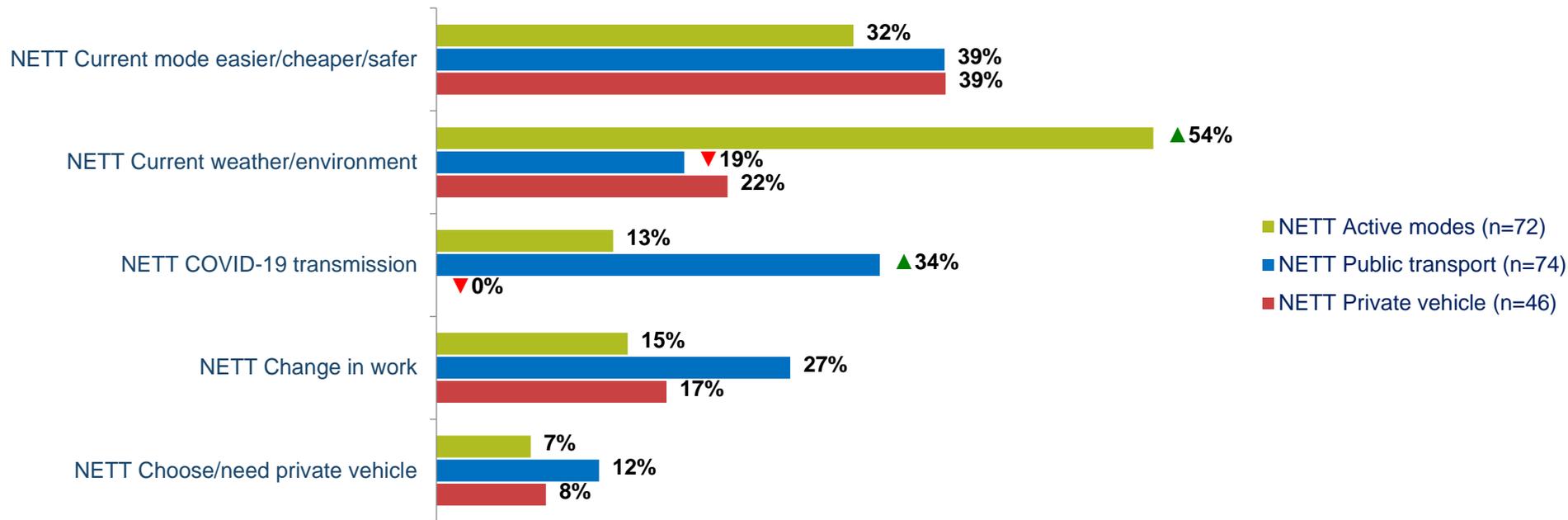
QWORKMODE. You indicated that in the past seven days you have travelled to work using a different mode to what you would have during a normal week. (e.g. in February of this year)

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, 12 and 13 (n=198)

Active mode travel is more impacted by weather, with public transport more affected by a wider range of factors

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, 12 or 13 (n=198)





Section 5 – Non-essential & domestic journeys

Key findings – non-essential & domestic journeys

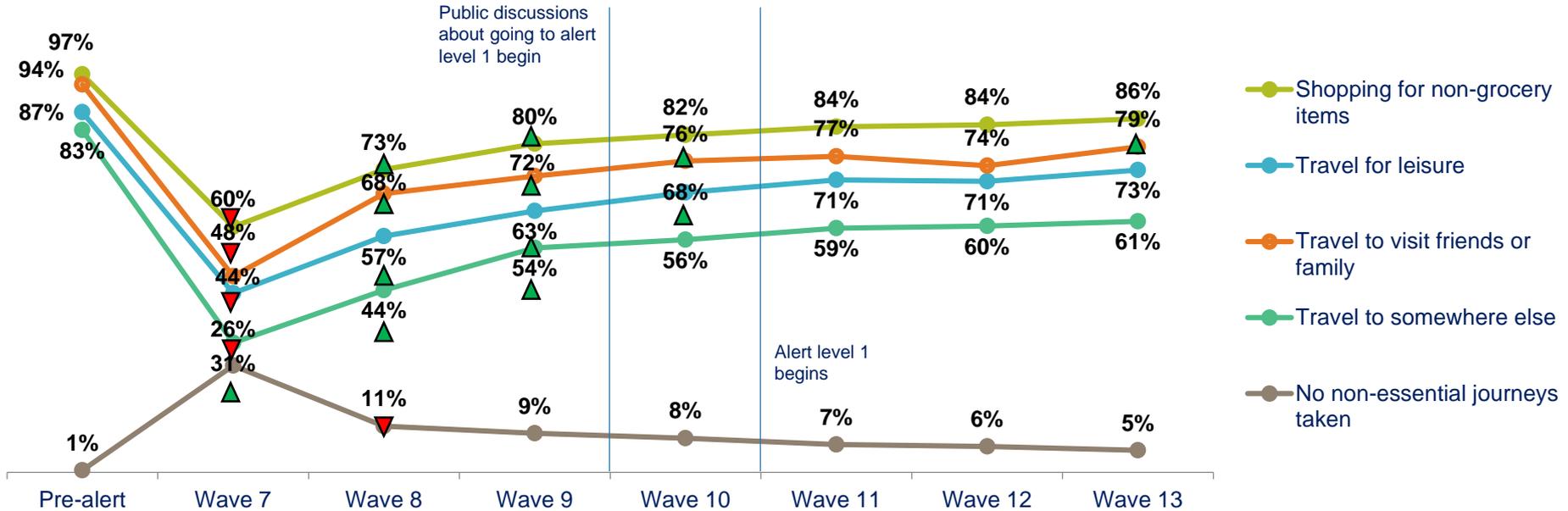
Waka Kotahi objective – how is non-essential & domestic travel changing?

- 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.
- Non-essential travel has seen little statistically significant growth during level 1, but there has been a significant jump in those who are travelling for friends and family visits during this wave.
- Inter-regional travel declined from a peak in wave 10, which coincided with a public holiday and has not returned to those levels since. The bigger driver of this has been a decrease and halted growth in those travelling to visit family and friends.
- Although not statistically significant, there has been some indication of an increase in work, education and even conference travel.



Since alert level 1 began, the proportion travelling for non-essential reasons has been in a plateau, with a minor jump in visits to friends during wave 13

Non-essential journeys



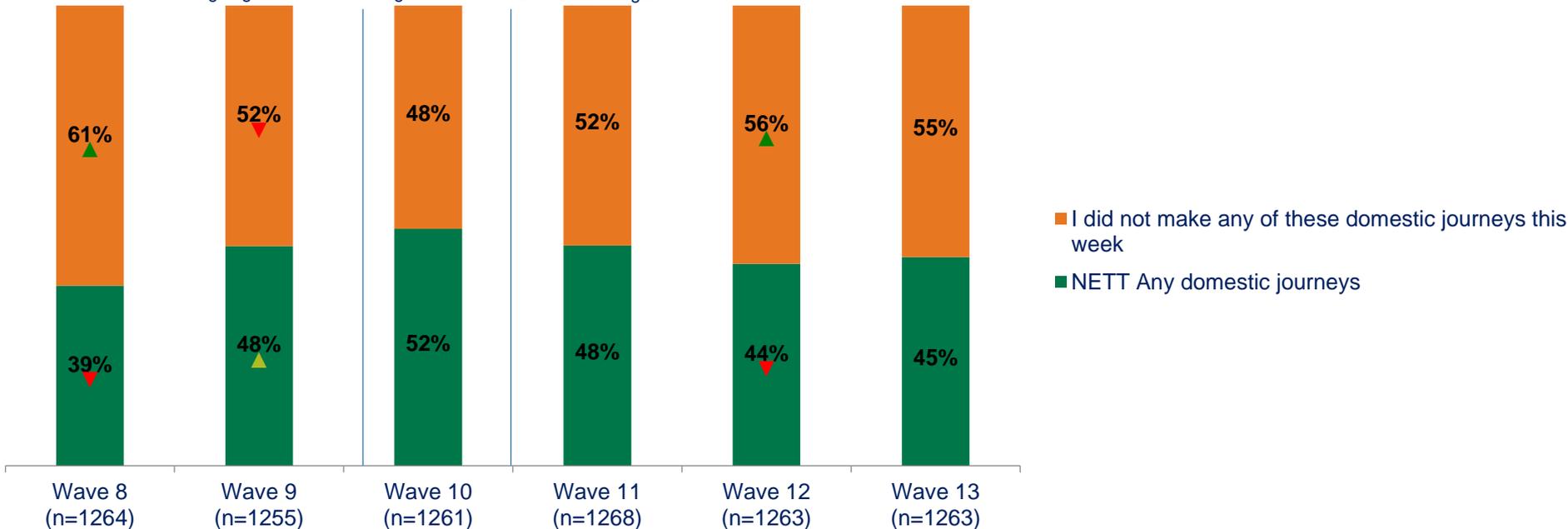
QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
 Base: all adults 15+ interviewed during level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

The proportion making inter-regional domestic journeys dropped from a wave 10 peak and has remained at less than half since

Domestic journeys in the past seven days by wave

Public discussions about going to alert level 1 begin

Alert level 1 begins



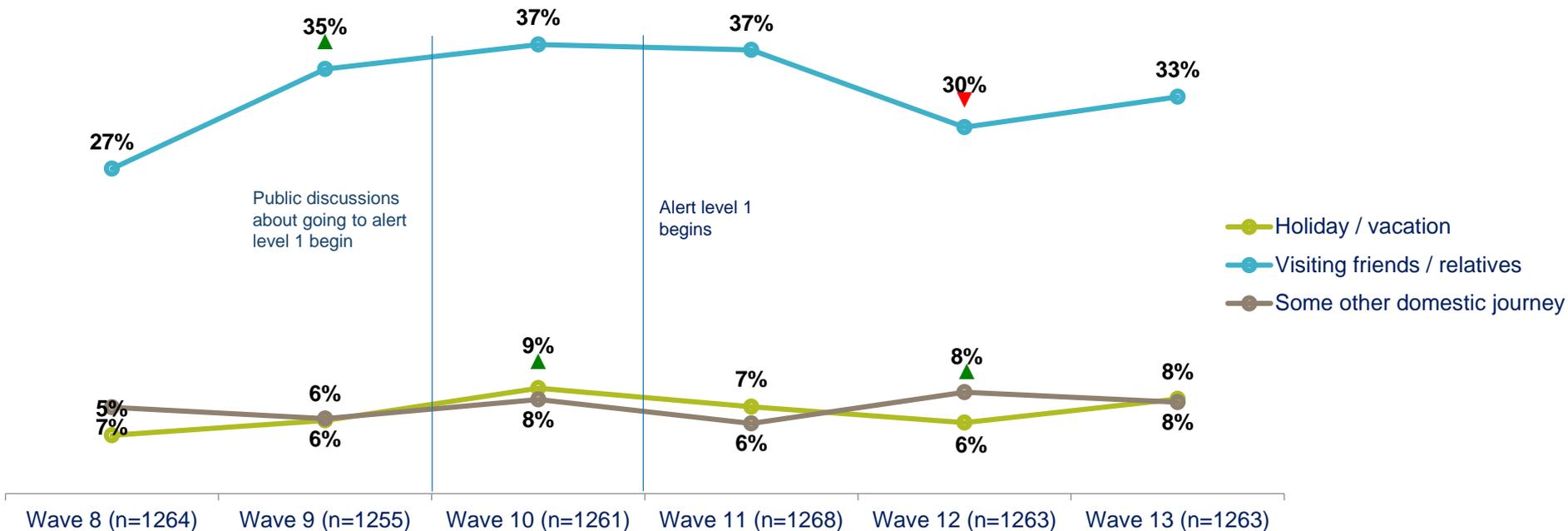
QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

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), wave 13 (n=1,263)



In the case of inter-regional journeys, the proportion travelling to visit friends and relatives has not returned to the levels seen in waves 10 and 11

Domestic journeys in the past seven days by wave



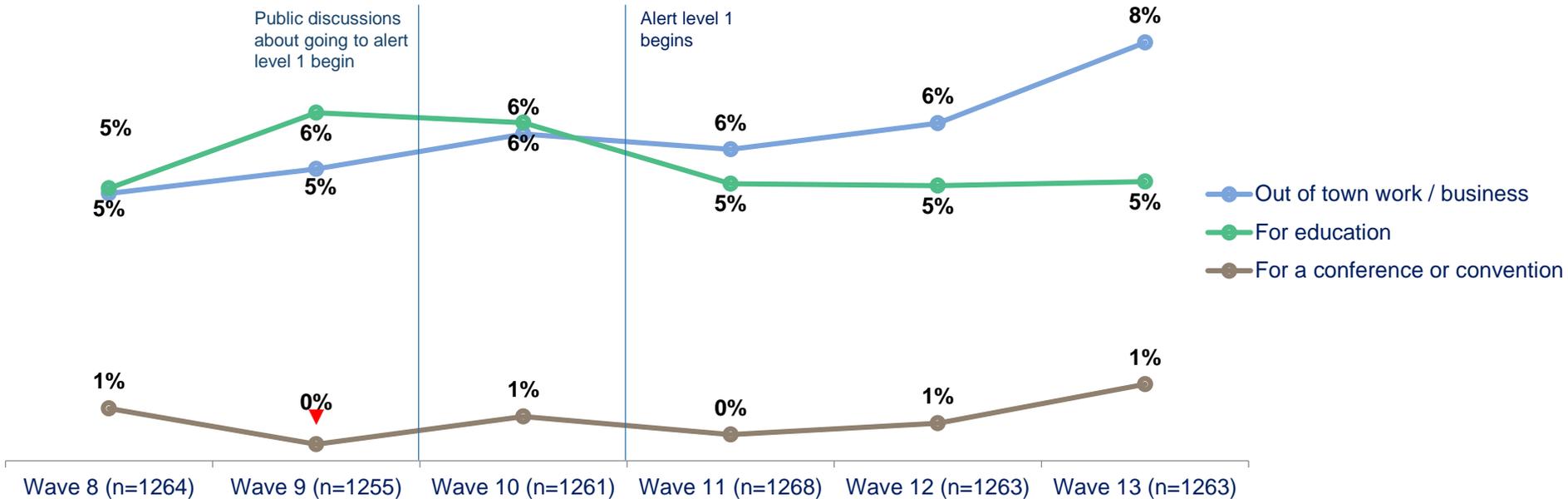
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Although not statistically significant, there has been a directional increase in those travelling for work or business

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), wave 13 (n=1,263)





Section 6 – Future domestic tourism

Key findings – future domestic tourism

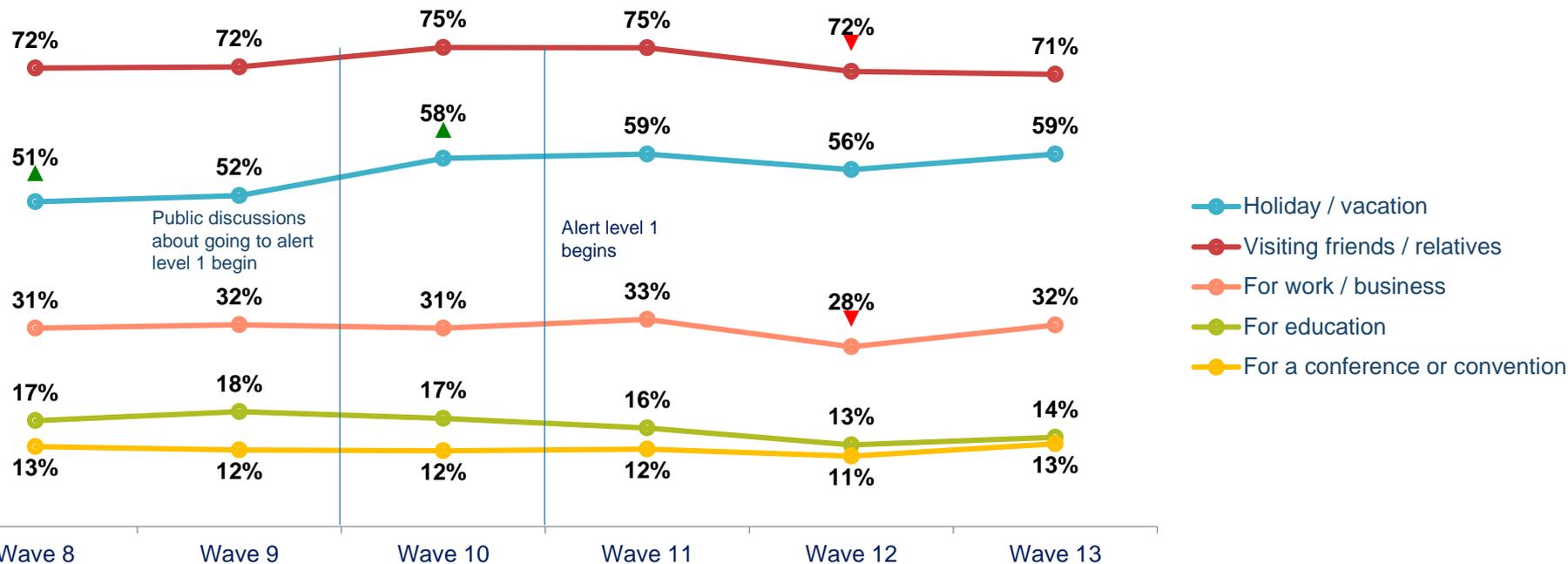
Waka Kotahi objective – how will domestic tourism change going forward?

- 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 continued to decline, and the balance has shifted such that the projected NETT change in travel for this reason has trended negatively to -7%.
- However, as people's work lives return to normal, the expectation of travel for business, conferences and education has moved positively. While responses still indicate a NETT decrease in these types of journeys, the decrease projected is becoming smaller.
- COVID-19 remains salient as a reason to travel less, with the proportion citing transmission and disruption concerns resulting from the virus remaining steady after the jump in wave 12.



Although it is still the most planned journey, the proportion planning to travel to visit others is at the lowest level recorded so far

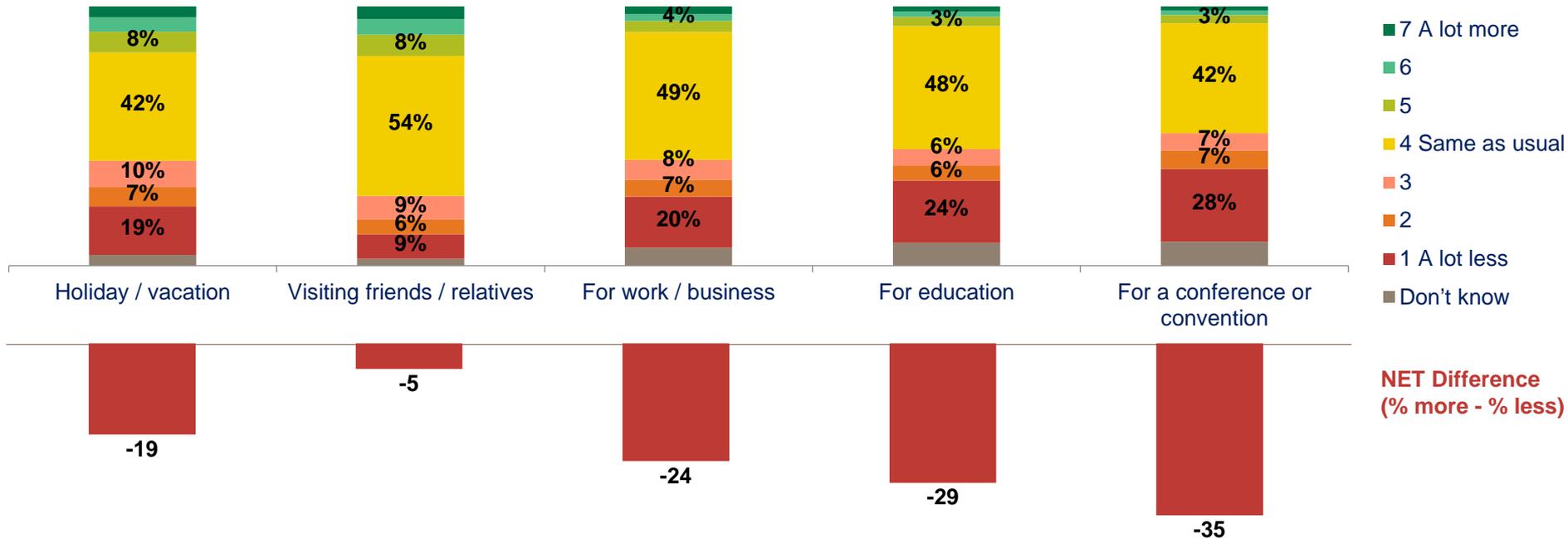
Proportion saying that they are likely to make domestic journeys in the next 6 months



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

It is still the case that responses indicate a NETT decrease in domestic tourism journeys in the coming six months

Intention to travel more or less domestically

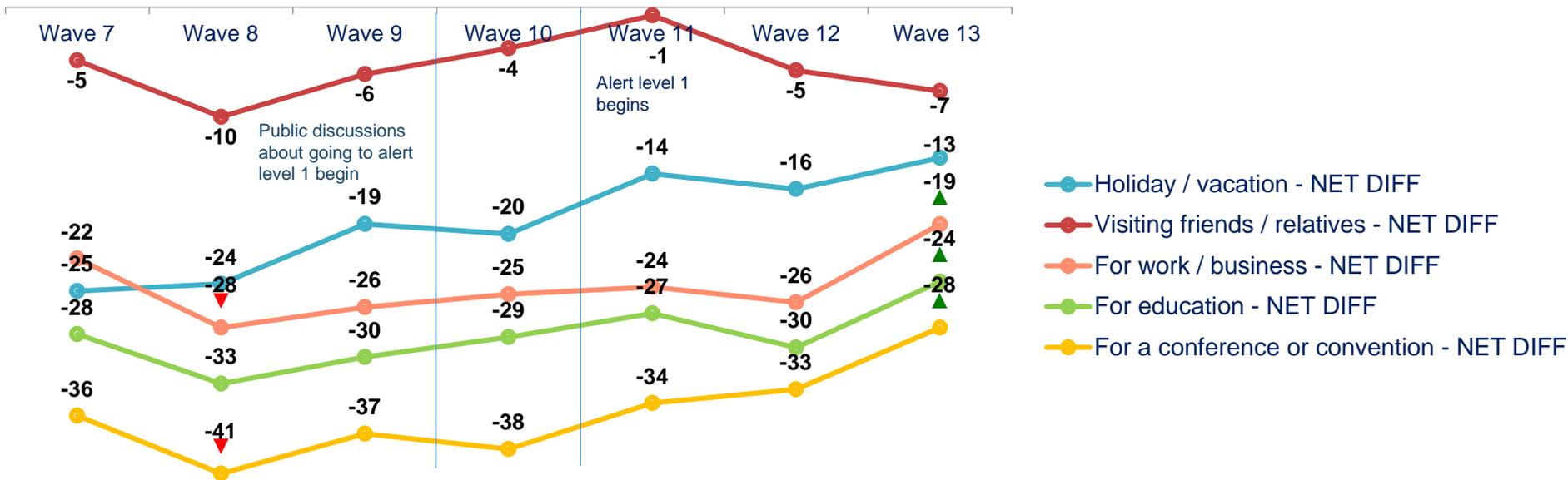


FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand

There have been statistically significant jumps in the projected NETT growth of work and education trips in wave 13, but a downward trend continues for visiting 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



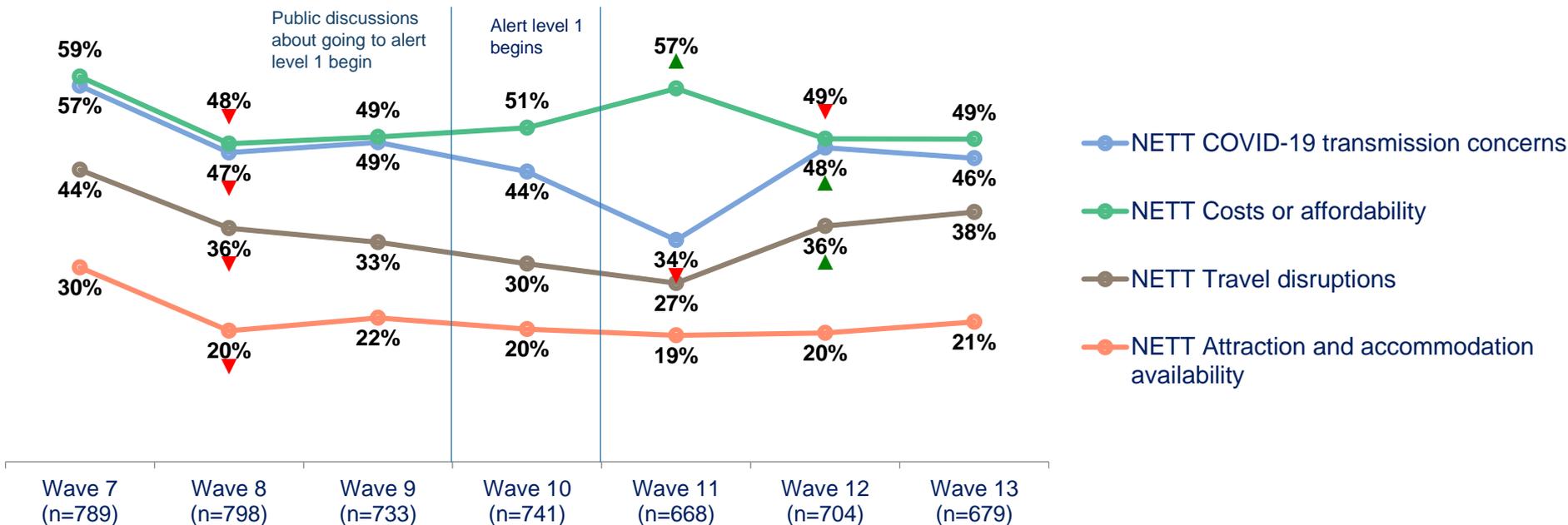
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

As with general concerns about COVID-19, the proportion citing it as a reason to travel less has remained at a higher level in wave 13

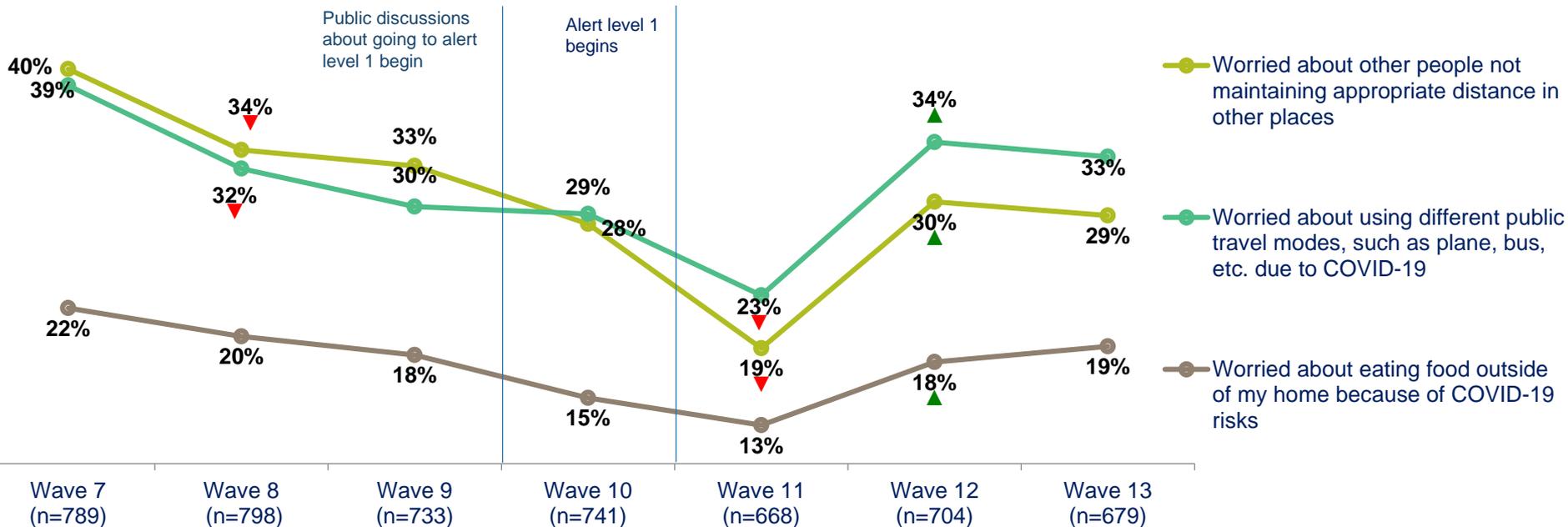
Reasons for travelling less



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

All COVID-19 concerns have maintained this pattern of rising in wave 12 and holding firm in wave 13

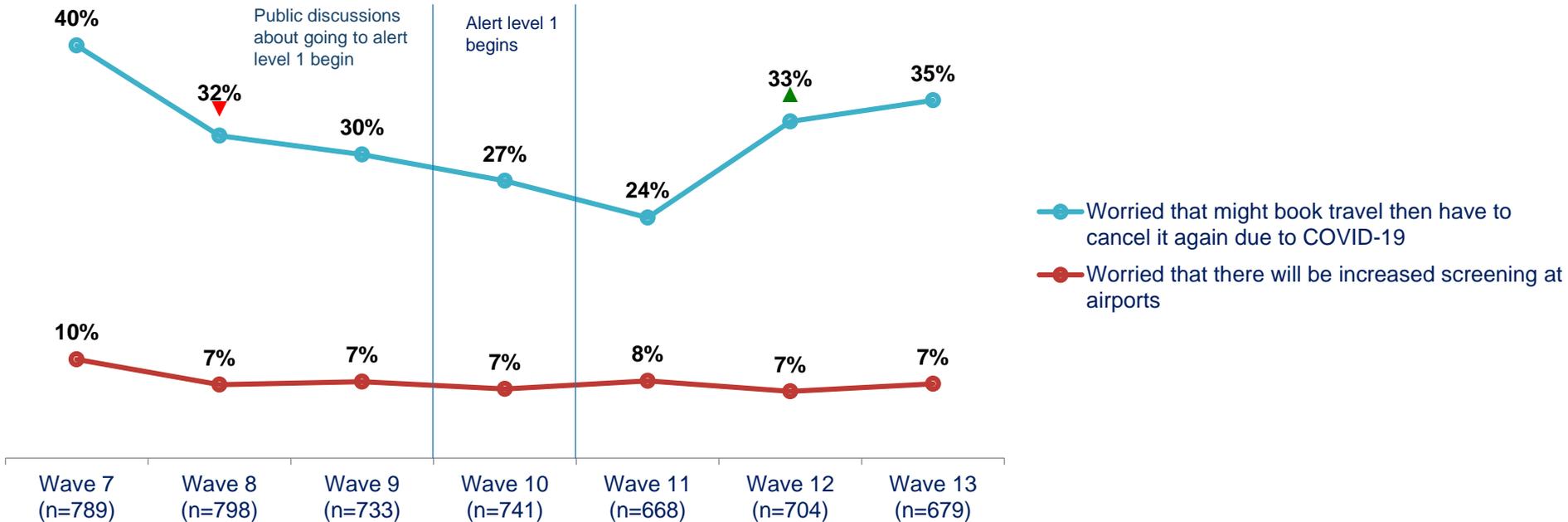
Reasons for travelling less – COVID concerns



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

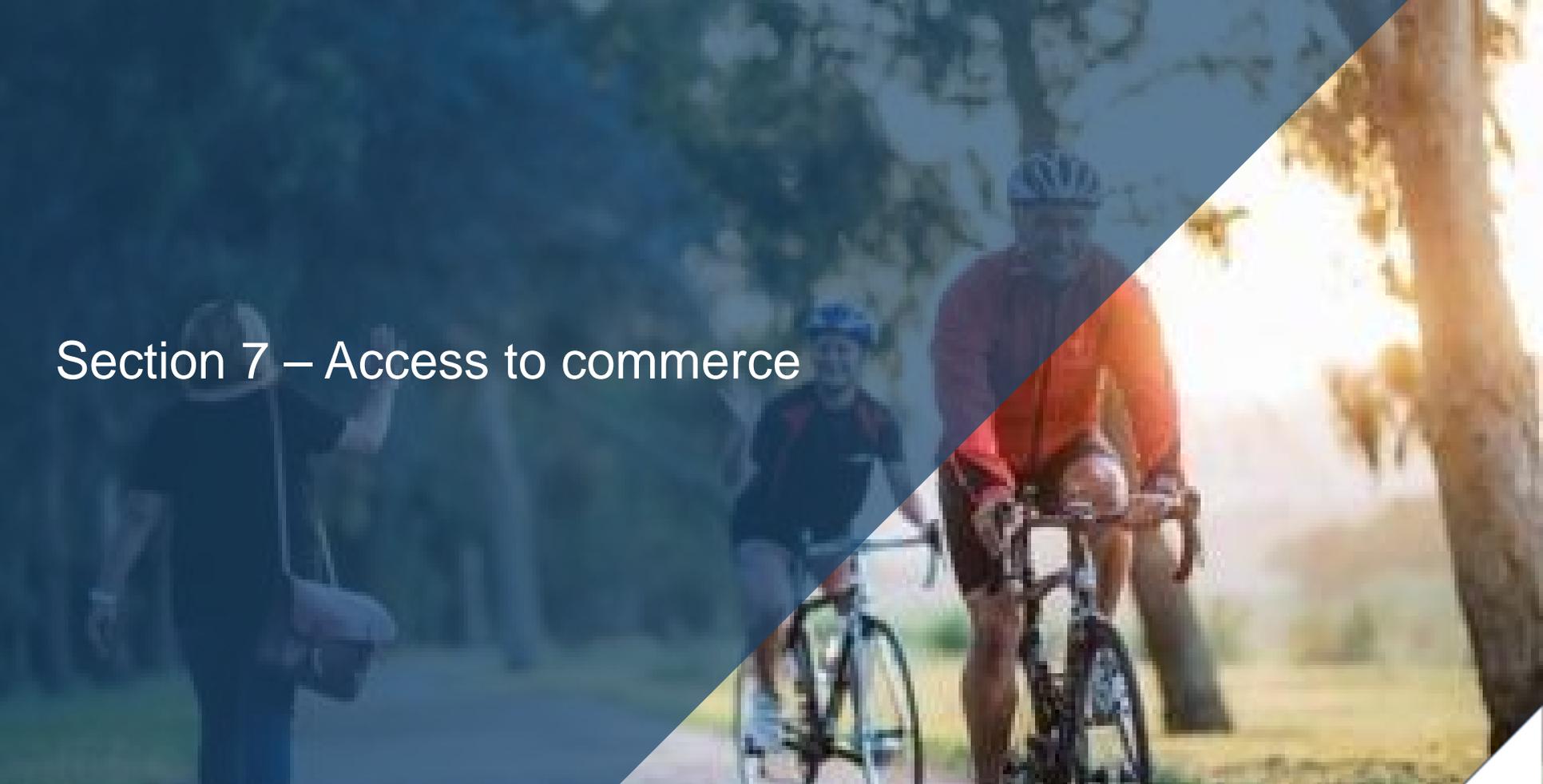
This is also the case in terms of those concerned about the travel disruption that COVID-19 will cause

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





Section 7 – Access to commerce

Key findings – access to commerce

Waka Kotahi objective – changes to travel

- 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.
- New Zealanders have kept up shopping activities during lockdown, particularly grocery shopping and some less routine purchases like whitewares and electronics.
- They are planning fewer purchases in the coming months, although some categories are frequently unplanned and the one area of projected growth is in home improvement.
- To keep up this level of shopping during lockdown there has been significant use of online delivery and click & collect shopping, particularly with non-routine categories like clothing, furniture and electronics.
- However, coming out of lockdown, New Zealanders express a desire to shift from this pattern of activity back towards physical stores, particularly those local to them.



Taking a longer view of purchasing, everyone reports grocery shopping recently, but the one category they expect to shop more in is home improvement

Shopping journey past three-four months vs next three-four months



QNEWSHOP1: Which, if any, of the following categories have you purchased in the past three–four months? QNEWSHOP3: And thinking ahead to the next three–four months, which, if any of the following do you think you are likely to purchase?

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



Two in five say that at least one recent purchase was delivered to them, but in terms of their projected purchases there is a shift towards physical locations

Shopping channel past three-four months vs next three-four months



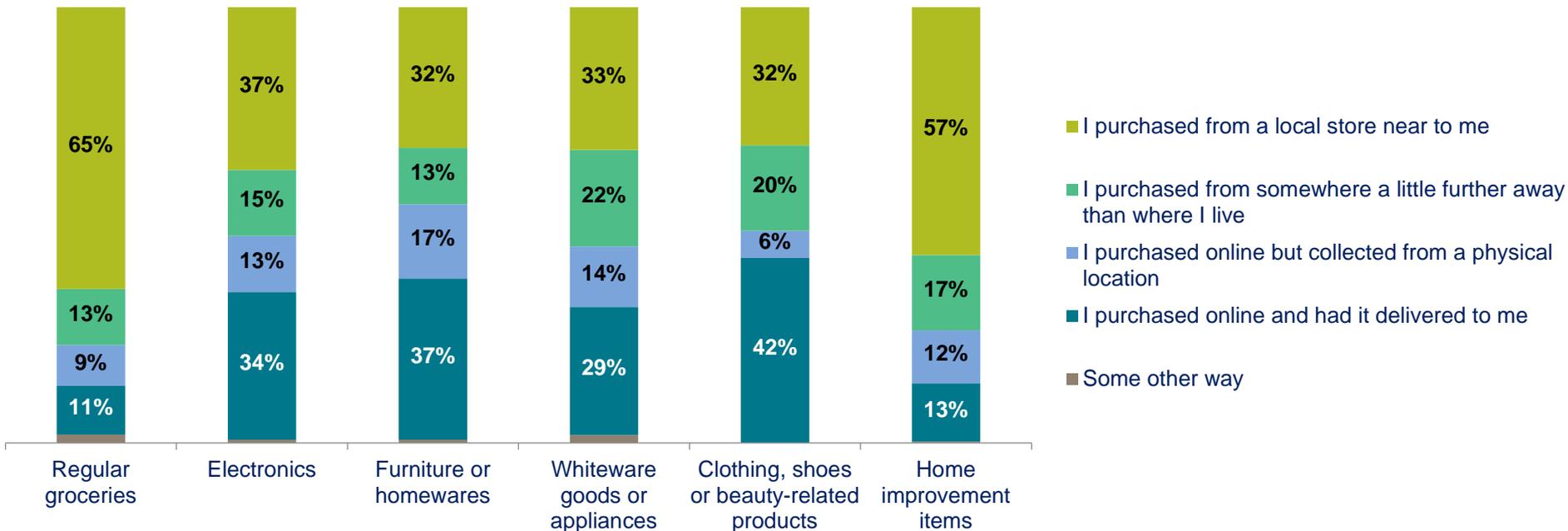
QNEWSHOP2/ QNEWSHOP4: And in which way did you make those purchase(s)?/And how do you think you will purchase those items?

Base: all adults 15+ in New Zealand who have made a purchase or intend on making a purchase (n=1,263)



Grocery shopping and home improvement have been the main categories where people have shopped locally, with clothing the biggest *delivery* category

Shopping channel past three-four months

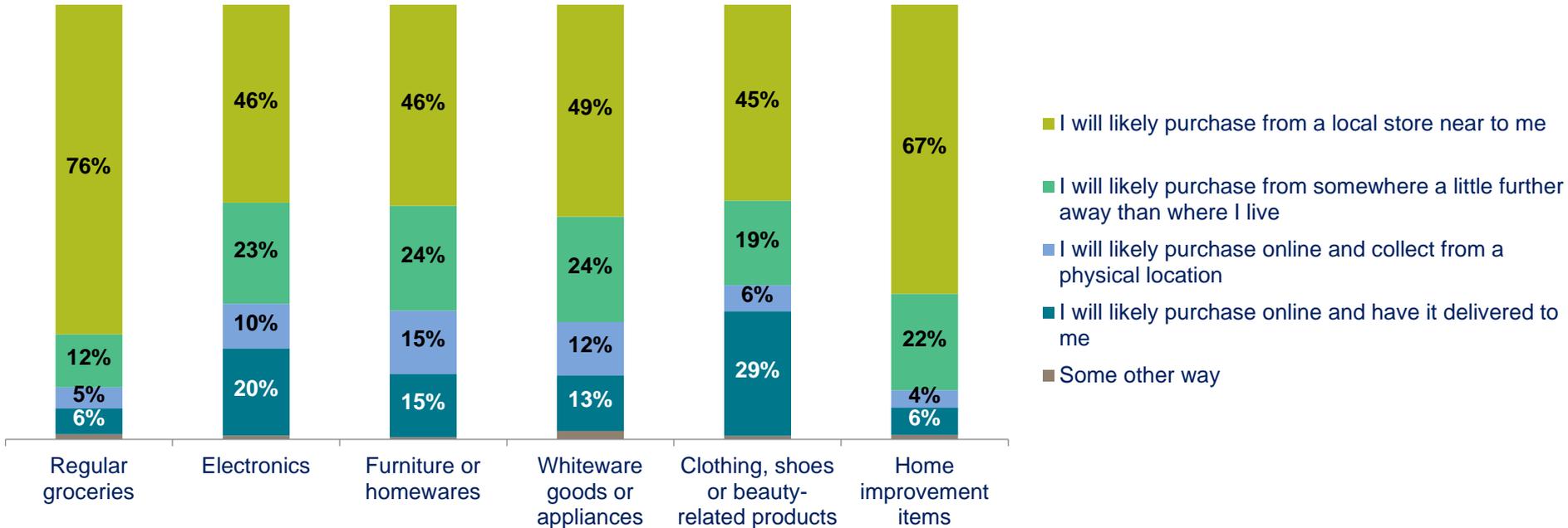


QNEWSHOP2: And in which way did you make those purchase(s)?

Base: all adults 15+ in New Zealand who have made a purchase in the past three-four months (n=1,262)

Intended shopping locations for the next quarter are shifting towards local locations, but clothing purchases will still be one of the big delivery categories

Shopping channel next three-four months

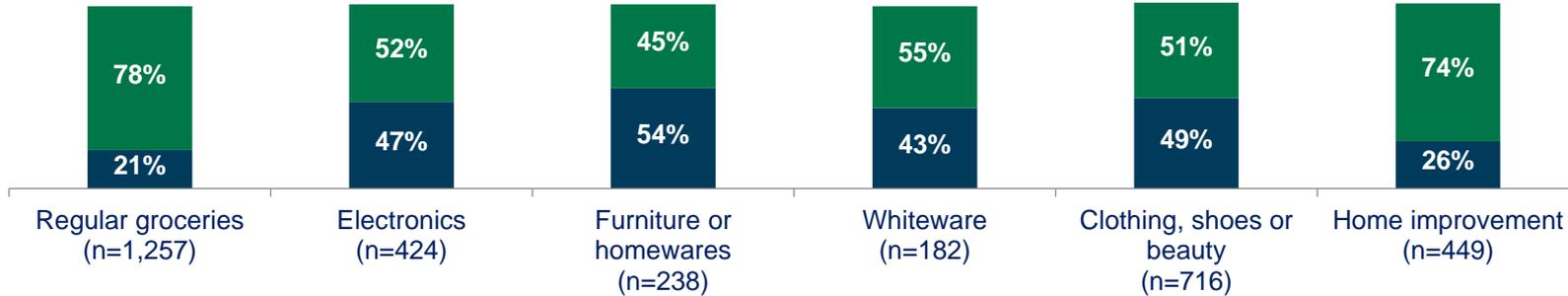


QNEWSHOP4: And how do you think you will purchase those items?

Base: all adults 15+ in New Zealand who intend to make a purchase in the next three-four months (n=1,199)

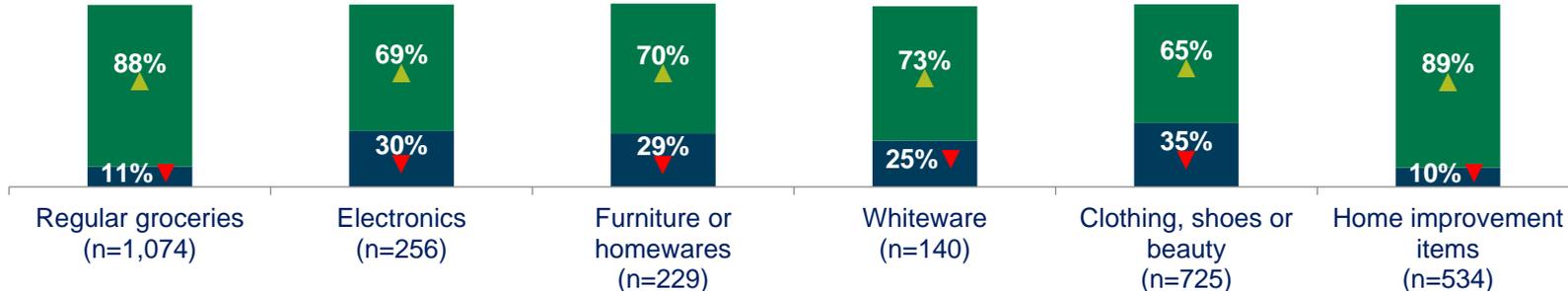
Viewed comparatively, there is a statistically significant shift from online to physical location in each category when comparing recent and intended purchases

Shopping channel past three-four months



Physical location
Online purchase

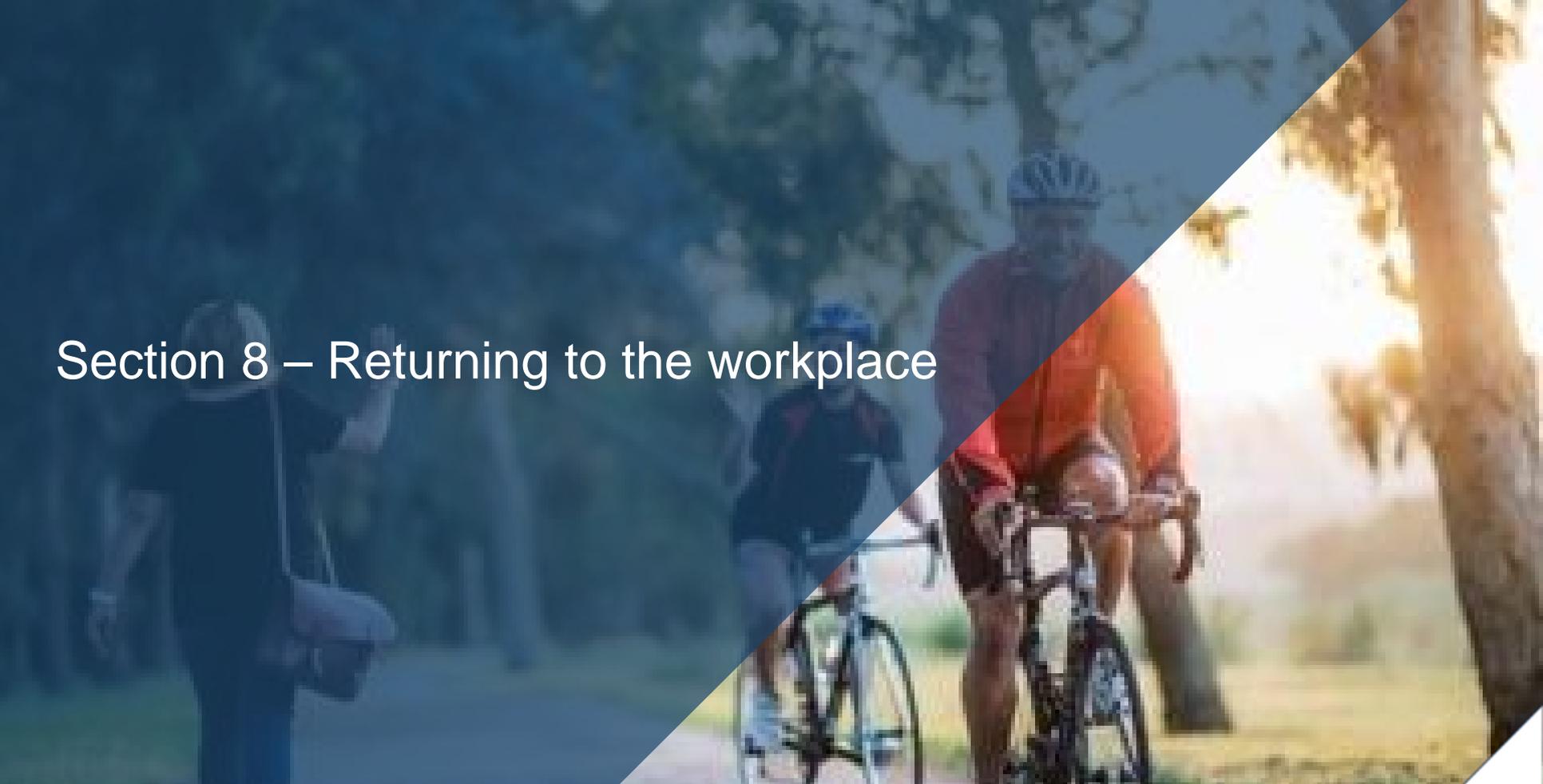
Shopping channel next three-four months



QNEWSHOP2: And in which way did you make those purchase(s)? QNEWSHOP4: And how do you think you will purchase those items?

Base: all adults 15+ in New Zealand who have made each type of purchase in the past three-four months (n=1,262); all who intend to make each type of purchase in the next three-four months (n=1,199)





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.
- In order to better measure the attitudinal factors impacting longer-term working from home trends, wave 13 saw a questionnaire design change to ensure that attitudinal questions are now addressed to those who *can* work from home, even if they do not and have not done so during lockdown.
- This puts capability at a lower level than measured previously, since this may be one of the reasons that some who can do their job from home do not do so.
- Opportunity is also significantly impacted by the inclusion of these respondents, with motivation least impacted, although it is directionally shifting towards a workplace preference rather than a working from home preference.



As people return to normal workplaces, some sample changes have been made to attitudinal questions to better project how attitudes impact trends

Proportion qualifying for working from home attitudinal questions

Public discussions about returning to alert level 3 begin

Alert level 3 begins

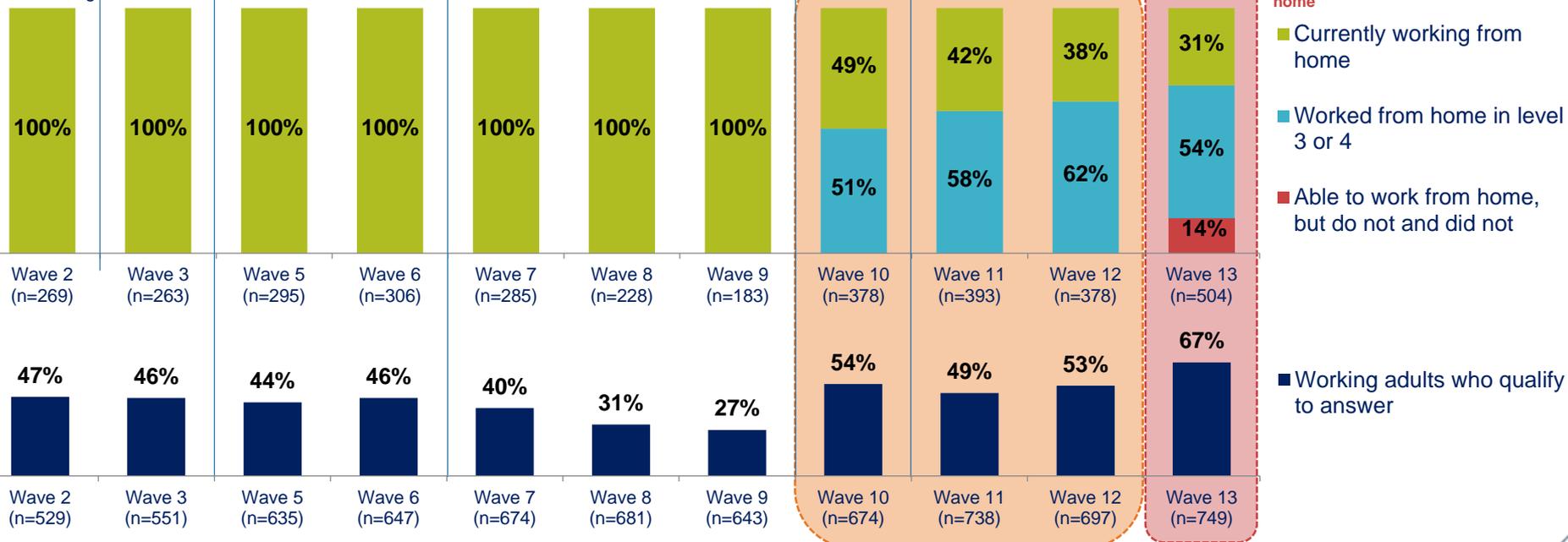
Alert level 2 begins

Public discussions about going to alert level 1 begin

Alert level 1 begins

Sample updated to include those who had worked from home at all during lockdown

Sample updated to include people who could but do not work from home



QWORK2A/QWORK2C/QWORK2D And where do you currently work?/ Did you work from home at all during alert levels 4 and 3?/Which, if any of the following applies to your job?
 Base: New Zealanders currently working from home, those who worked from home during level 4 or level 3 and those able to work from home



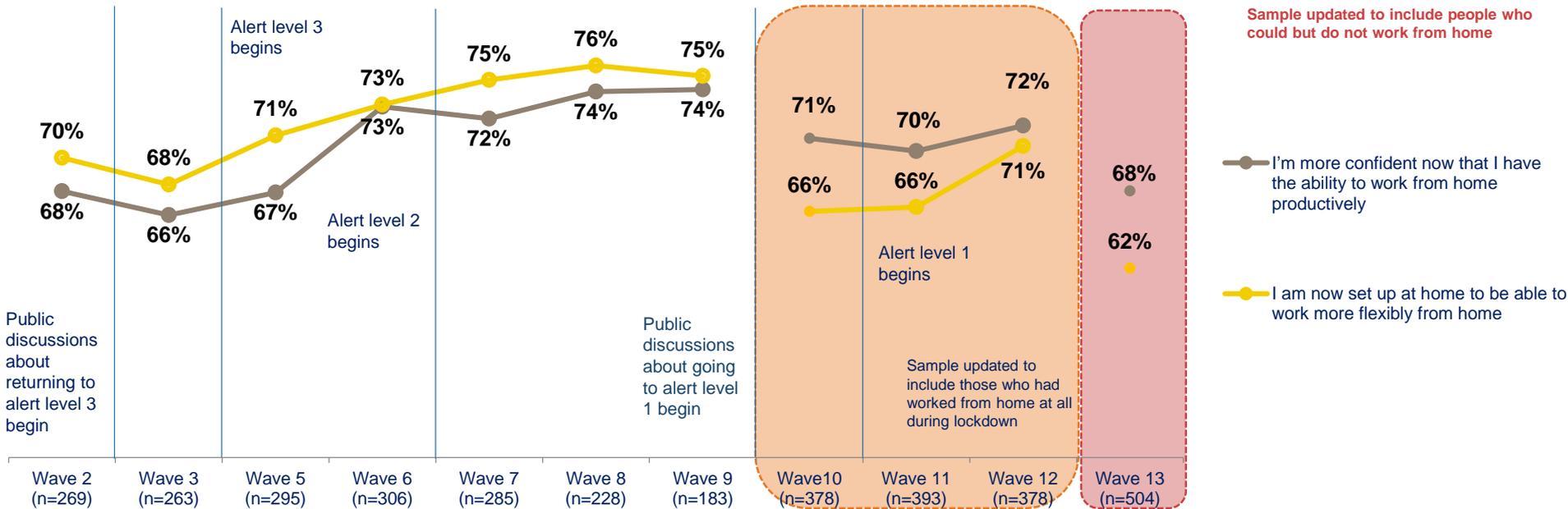
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

With the inclusion of those who can and do not work from home, the proportion set up to do so has dropped off significantly

Working from home attitudes (NETT all agree), capability



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

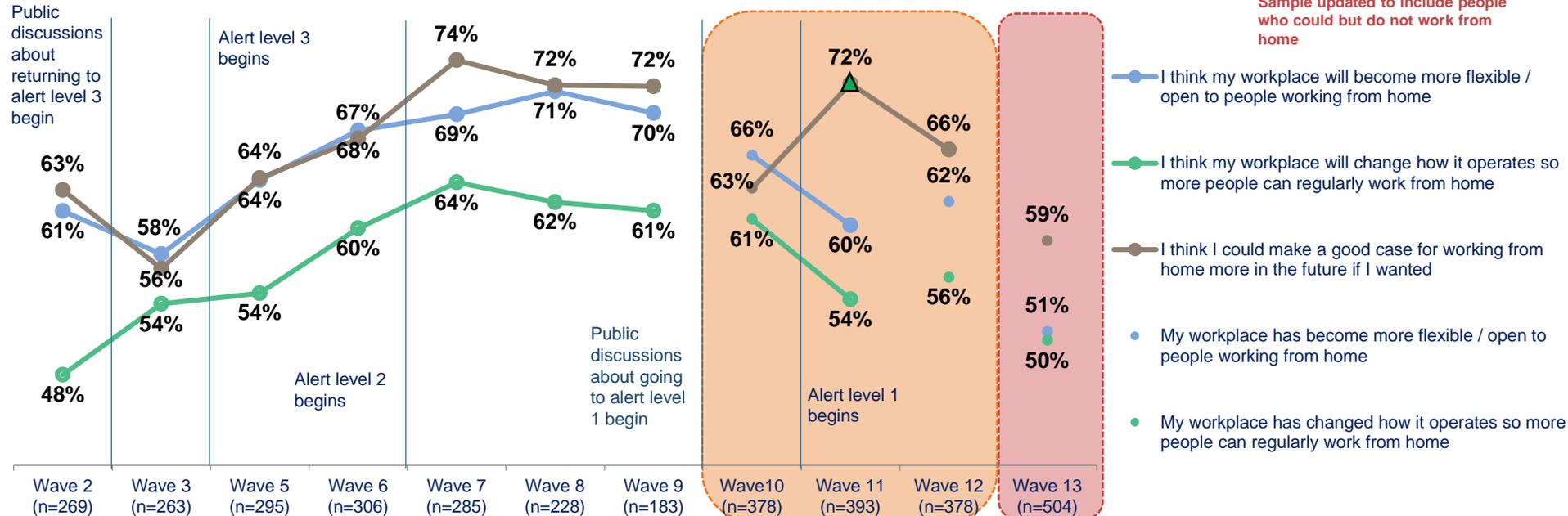


There has also been a decrease in opportunity factors, which were already trending downward during level 1

Working from home attitudes (NETT all agree), opportunity

Sample updated to include those who had worked from home at all during lockdown

Sample updated to include people who could but do not work from home



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



Indicates a statistically significant increase from previous time period



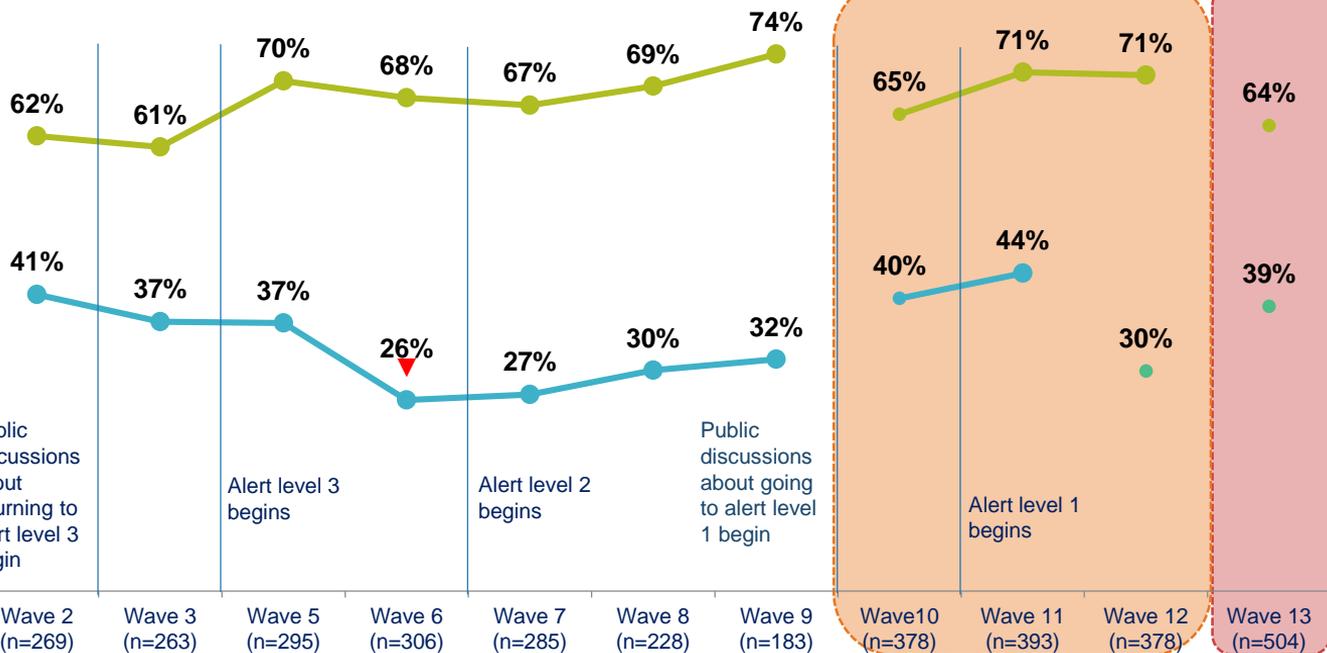
Indicates a statistically significant decrease from previous time period

When it comes to motivation, the change in those answering the question has coincided with a shift towards greater motivation for returning to the workplace

Working from home attitudes (NETT all agree), motivation

Sample updated to include those who had worked from home at all during lockdown

Sample updated to include people who could but do not work from home



● Now that I've experienced it, I would like more flexibility to work from home

● As soon as restrictions are lifted, I'll return to the workplace asap even if it isn't required

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

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



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

