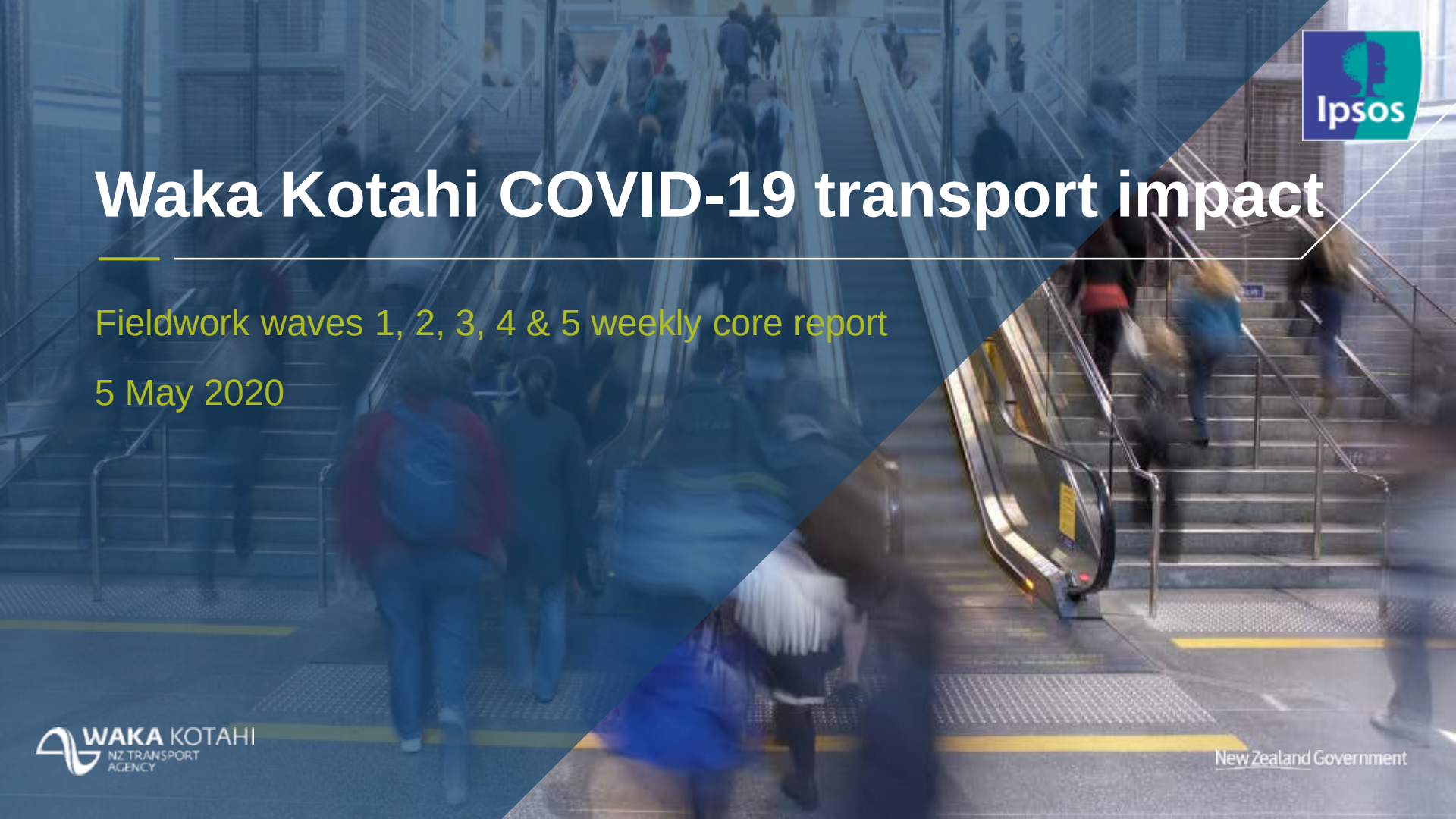
Waka Kotahi COVID-19 transport impact

Fieldwork waves 1, 2, 3, 4 & 5 weekly core report

5 May 2020



WAKA KOTAHI NZ TRANSPORT AGENCY

New Zealand Government

Disclaimer

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

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

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

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 on a weekly basis:

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

Example: Harmony Dashboard Page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys undertaken and changes

- change is measured since February 2020.

Modal shift patterns and perceptual shifts

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

Measuring attitudinal shifts towards COVID-19

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

Questions to classify into a variety of segments of interest

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

Report notes (i)

Key information to note for this report

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

Report notes (ii)

Key transport terms and demographic groupings

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

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

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

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

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

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

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

Essential worker: All respondents indicating that they are classified as an Essential Worker at the current alert level.

Travelling essential worker: All respondents indicating that they are classified as an essential worker at the current alert level and that they are required to leave their home for their job**.**

Sample structure and further definitions

	Definition	Total Sample		Waves 1 - 4		Wave 5	
		Sample	MoE*	Sample	MoE*	Sample	MoE*
Total		n=6,327	1.23	n=5,060	1.38	n=1,267	2.75
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,655	2.41	n=1,324	2.69	n=331	5.39
Tauranga	All living in the city of Tauranga	n=500	4.38	n=400	4.9	n=100	9.8
Hamilton	All living in the city of Hamilton	n=500	4.38	n=400	4.9	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=907	3.25	n=684	3.75	n=223	6.56
Christchurch	All living in the city of Christchurch	n=500	4.38	n=400	4.9	n=100	9.8
Dunedin	All living in the city of Dunedin	n=498	4.39	n=398	4.91	n=100	9.8
Rest of NZ	All living in areas outside of those noted above	n=1,767	2.33	n=1,454	2.57	n=313	5.54
Any Disability	See previous page	n=707	3.69	n=550	4.18	n=157	7.82
COVID-19 Vulnerable	See previous page	n=1,527	2.51	n=1,230	2.79	n=297	5.69
Aged 70 + years	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over	n=786	3.5	n=618	3.94	n=168	7.61
Travelling Essential Worker	See previous page	n=685	3.74	n=542	4.21	n=143	8.2
Essential worker	See previous page	n=1,422	2.6	n=1,125	2.92	n=297	5.69

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

Context: New Zealand COVID-19 timeline

3 February

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

28 February

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

4–18 March

Cases continue to rise, with the number reaching 20 by 18 March

14 March

Announcement that all travellers arriving in New Zealand must self-isolate for 14 days upon arrival

16 March

Public gatherings of more than 500 people banned

17 March

COVID-19 business package worth $12.1 billion announced

19 March

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

21 March

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

23 March

New Zealand upgraded to level 3, with the public notified that this would be raised to level 4 at 11:59pm, 25 March. Non-essential services told that they are required to close in 48 hours

24 April

All public transport to be free during lockdown period

25 March

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

3 April

Waka Kotahi COVID-19 impact tracker fieldwork begins

20 April

PM Jacinda Ardern announces that New Zealand will move to level 3 at 11:59pm, 27 April, remaining there for at least 2 weeks

27 April

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

Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1 – 5

Waka Kotahi COVID-19 transport impact tracker

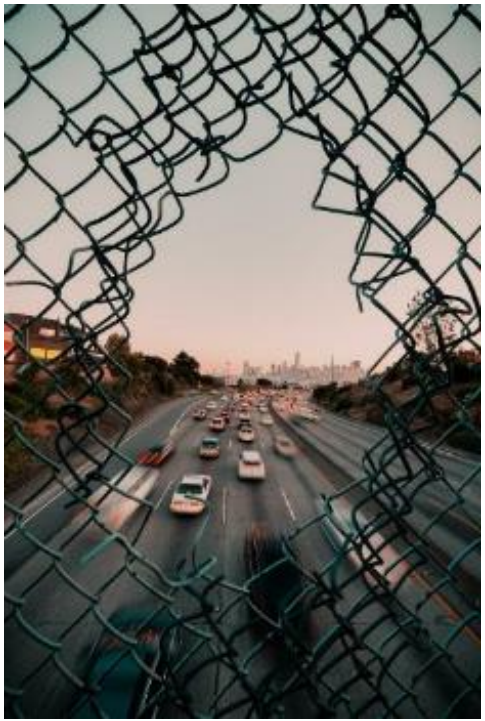
- Under level 3 restrictions, new types of out of home activity are possible, with 15% this week taking up that opportunity.
  - This increase is happening among those categorised as “partially isolated”, so the picture of adherence remains unchanged from level 4.
- All modes of transport have seen an increase in reported usage and, at the same time, an increase in future consideration for the coming week. Although public transport usage hasn’t risen to a statistically significant extent, there has been a noted increase in bus consideration.
  - The stated triggers for returning to public transport are overwhelmingly focused on personal safety, expressed as a relaxing of lockdown levels and a feeling that it is safe to return, rather than a worsening car or bike experience driving them back onto public transport.
  - However, for buses to see a return to normal, image perceptions around hygiene and distancing may need to be improved.
- Attitudinal tracking shows that while motivation to adhere to restrictions remains high, confidence in knowing how to do so is slipping and the perception that others are adhering has fallen sharply.
  - There is a danger that this may create a feedback loop wherein the perceived non-adherence of others erodes the confidence and motivation of individuals to adhere.
- The return of “click and collect” services is putting private vehicle traffic back on the road, but the uptake of this has not been as significant as the increase of home delivery services.
- While some parents now have the option to return their children to school, there is still hesitancy among most of these parents whose children qualify to return. Level 3 may not see an impact on road traffic related to children returning to school.
- Preference and expectation about returning to the workplace is closely aligned, so those who want to go back to the office are much more likely to expect to return to the office following the end of level 3 restrictions.

Section 3 – COVID 19 travel behaviour

Key findings – COVID-19 travel behaviour

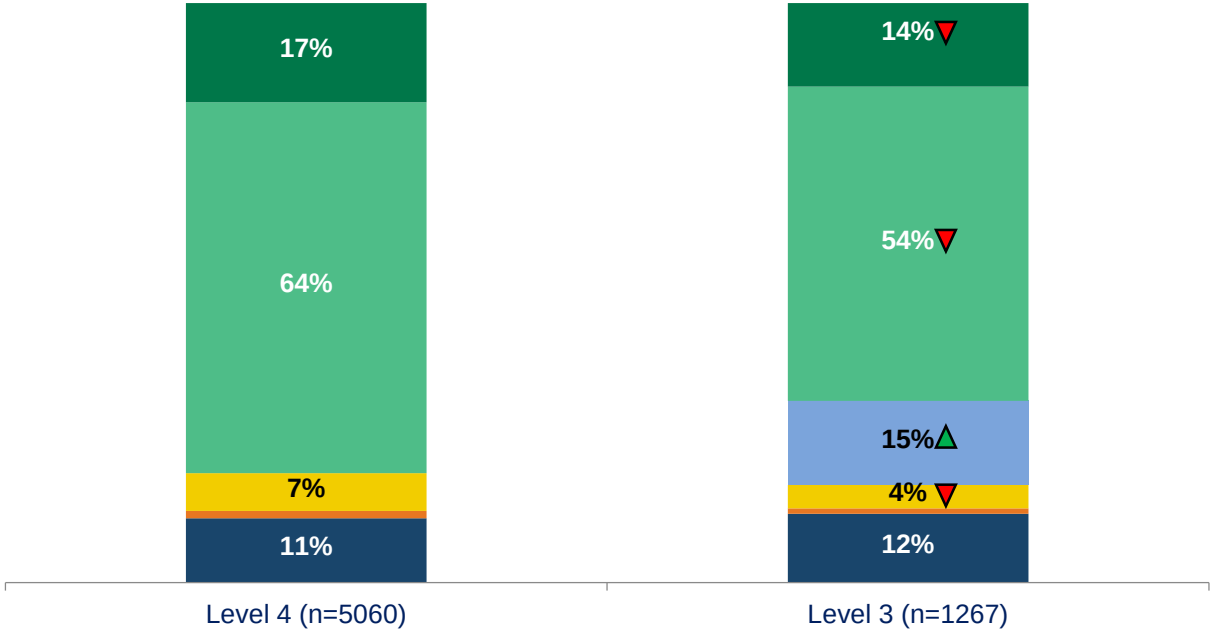
Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels the survey asks New Zealanders about their behaviour in the specific context of current self-isolation in relation to permitted movement and activity.
- New Zealanders are now presented with a different context to adjust to, with a small number of additional out-of-home activities now permitted in level 3.
- A number of people have taken advantage of this change to do things that they weren't doing before, but they are still only a minority, with most New Zealanders only leaving the home for essential journeys at most.
- The greater volume of permitted activities means that even though some New Zealanders are moving around more, the overall picture of adherence to lockdown restrictions is unchanged in level 3.
- The only tangible change in reported essential journeys is that from level 3 there have been some returning to educational institutions either to teach or to take their children to school.



Around 1 in 7 indicate that they've taken advantage of the change to level 3 by engaging in other activities, such as fetching purchases or travelling short distances

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



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

Level 4 segmentation

Vulnerability and activity

A segmentation was created to categorise the public according to their behaviour and circumstances in level 4.

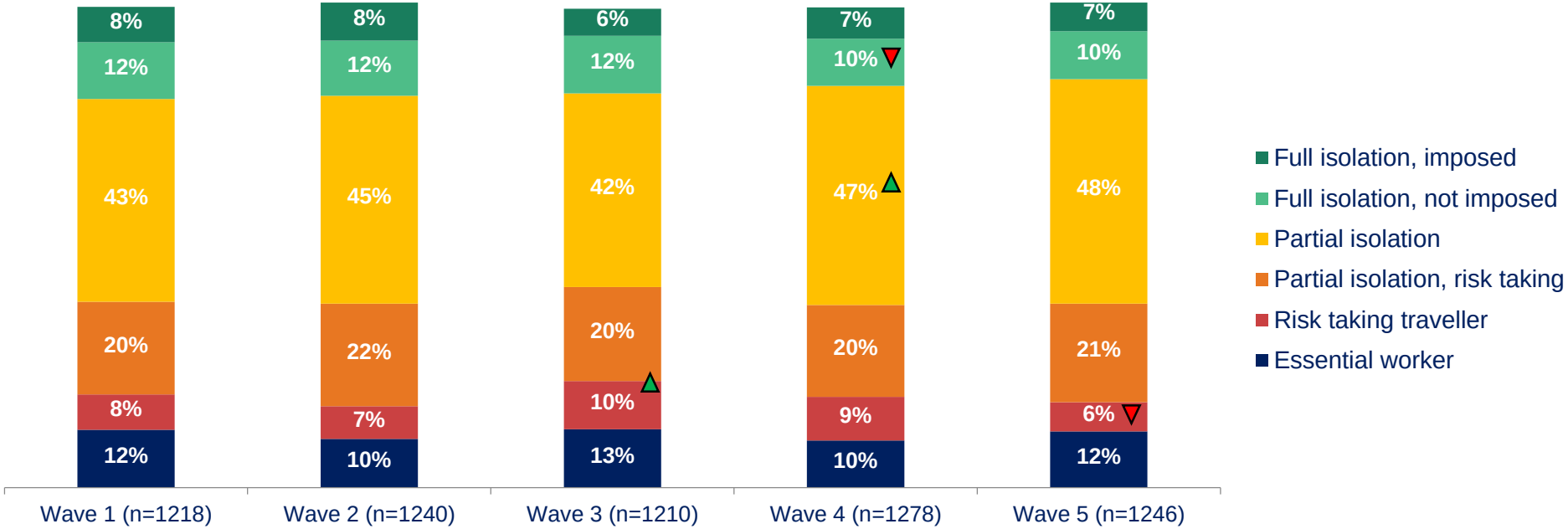
This has been updated to reflect changing permissions in level 3, whilst ensuring a consistent classification of adherence between survey waves.

<table>
<tr><th>Reported activity levels

Reported health status</th><th>I am not prepared leave the house for any reason during this week</th><th>I will only leave the house for essentials (e.g. food and medical reasons) excluding exercise</th><th>[NEW FOR LEVEL 3] I left the house for essentials and/or also to collect things I’d purchased, or to travel a short distance within my region</th><th>I travelled for some other reasons this week</th><th>I am moving around as I normally would</th><th>I am an essential worker and am required to leave home for my job</th></tr>
<tr><td>COVID-19 Vulnerable</td><td rowspan="3">Full isolation, imposed</td><td colspan="2" rowspan="3">Risk taking partial isolation</td><td colspan="3" rowspan="5">Risk taking traveller</td><td rowspan="5">Essential worker</td></tr>
<tr><td>Aged 70+ years</td></tr>
<tr><td>Overseas or exposed</td></tr>
<tr><td>Sick, not COVID-19</td><td>Full isolation, not imposed</td><td colspan="2">Partial isolation</td></tr>
<tr><td>COVID-19 or suspected COVID-19</td><td rowspan="2">Full isolation, imposed</td><td colspan="2" rowspan="2">Risk taking traveller</td></tr>
<tr><td>COVID-19 recovered</td></tr>
<tr><td>No health conditions</td><td>Full isolation, not imposed</td><td colspan="2">Partial Isolation</td></tr>
</table>

Despite the existence of other permitted activities in level 3, the way that this translates into overall lock-down adherence is unchanged

Reported activity and movement during the past seven days by survey wave

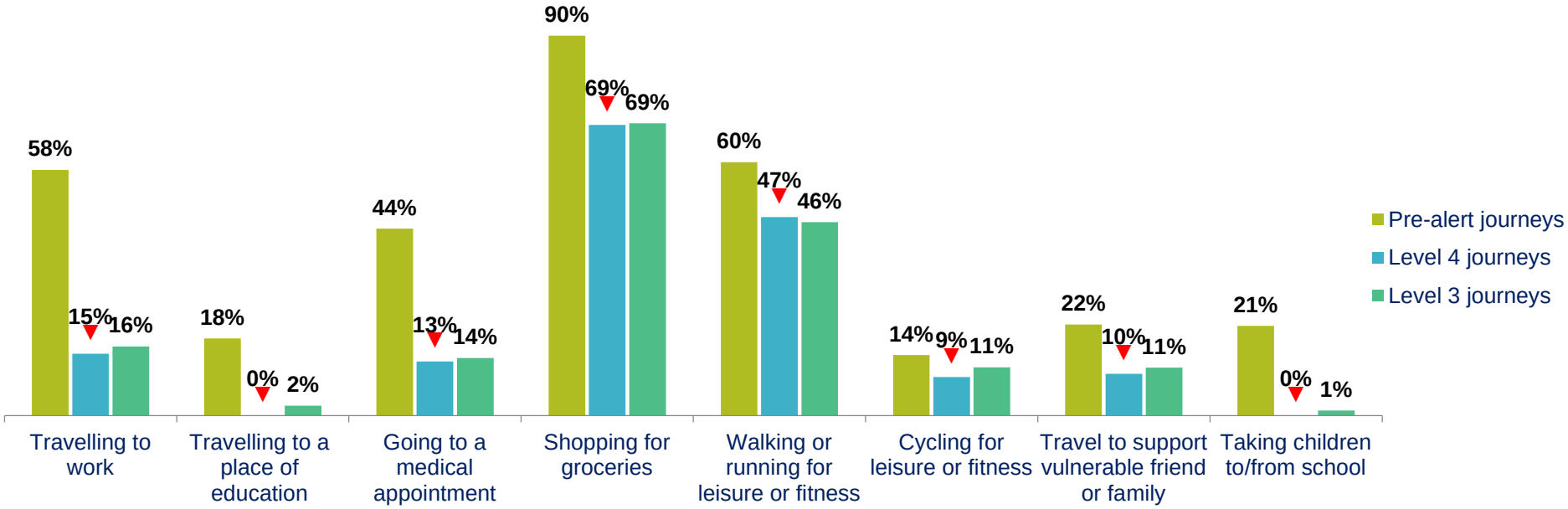


ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?/ QVULN Which, if any of the following best describes the health of people in your household last week?

Base:all adults 15+ in New Zealand

While a small number have begun travelling to places of education, either to teach or to take kids to school, the overall picture is mostly unchanged from level 4

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



QJOURNEY1/QJOURNEY. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
Base:all adults 15+ in New Zealand *Level 3 work travel data currently estimative and may be subject to change following investigation

Section 4 – COVID 19 mode usage

Key findings – mode usage

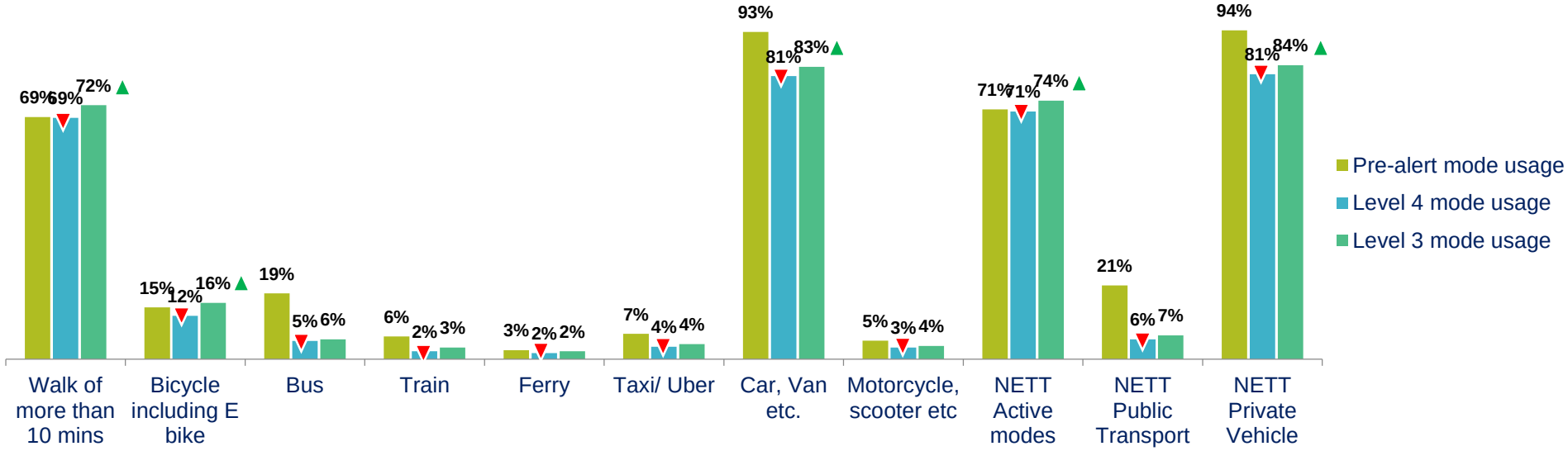
Waka Kotahi objective – how are travel patterns changing?

- In order to understand how travel patterns are changing we need to understand how COVID-19 may drive shifts in the modes of transport used at different risk levels and how this varies across the population.
- Self-reported usage of all modes has begun to rise again as the country has shifted to level 3 restrictions. However, it is only the use of active modes and private vehicles that has changed sufficiently to be considered significant.
- Walking and cycling for transportation returned to pre-lockdown levels even before the switch to level 3. However, using these modes for leisure has not recovered to the same extent.
- There is evidence of a continuing reliance on public transport among New Zealanders with a disability and this has recovered further under level 3.
- Alert level changes and the end of restrictions are seen to be the key triggers to encourage returning to public transport among those who have reduced their usage in lockdown.
- Despite this, the proportion who say they'd consider the bus as a transportation mode in the coming week has increased to a statistically significant extent along with other modes.

The advent of level 3 has seen a statistically significant increase in active mode and private vehicle usage, but public transport remains as it has been in level 4

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

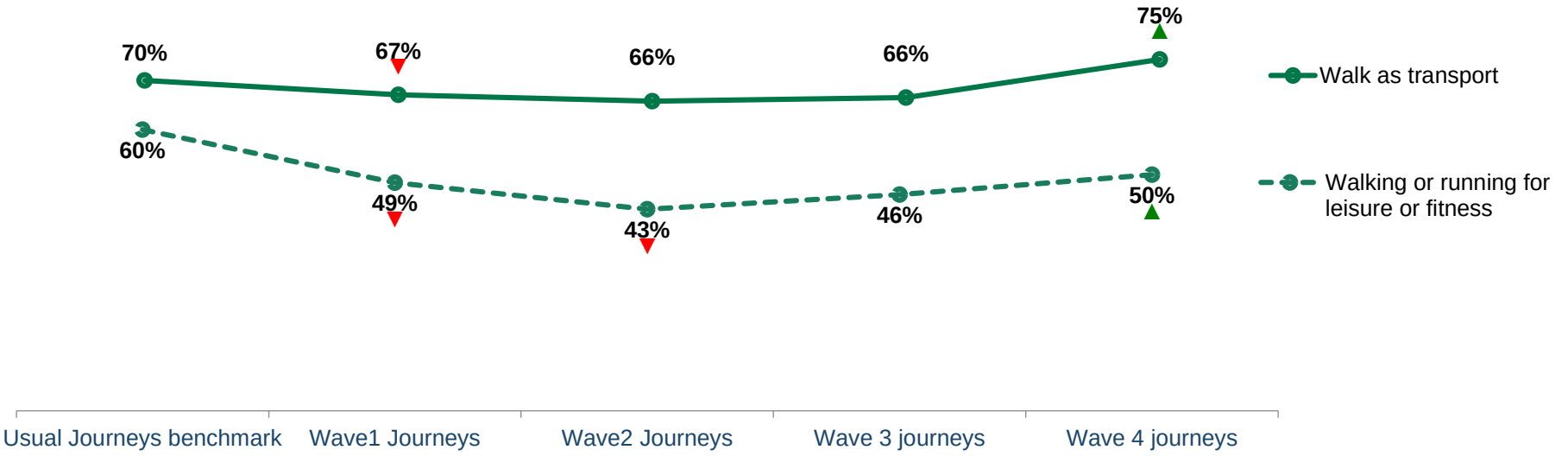
NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.
NETT of public transport includes bus,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



QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?
Base: all adults 15+ in New Zealand in Pre-alert level: (n=3,759); level 4 (n=5,060); level 3 (n=1,267);

The reported use of walking as a transportation mode exceeded benchmark levels in wave 4, while walking as leisure has yet to fully recover

Walking as transport compared with leisure (wave 4 analysis)

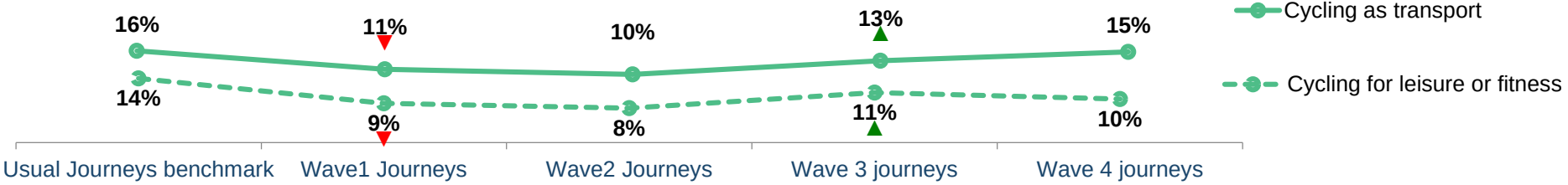


QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys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

Until wave 4, there was a two point gap in the proportions cycling for transport and for leisure; while this has widened, more tracking will allow us to infer real change

Cycling as transport compared with leisure (wave 4 analysis)



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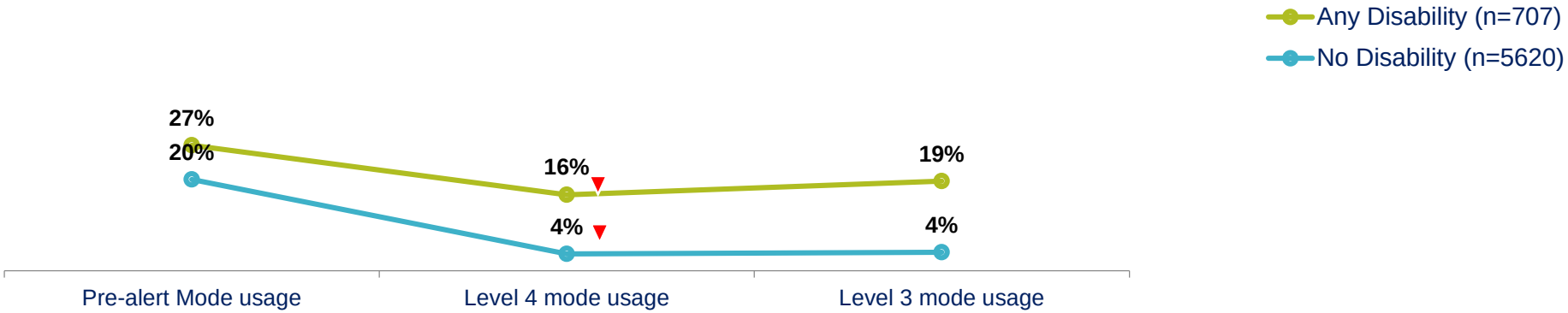
Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301)

Public transport usage among those with disabilities has been more resilient throughout alert levels and is now only eight points below pre-lockdown levels

Public Transport used in a normal week vs used in past week by alert level

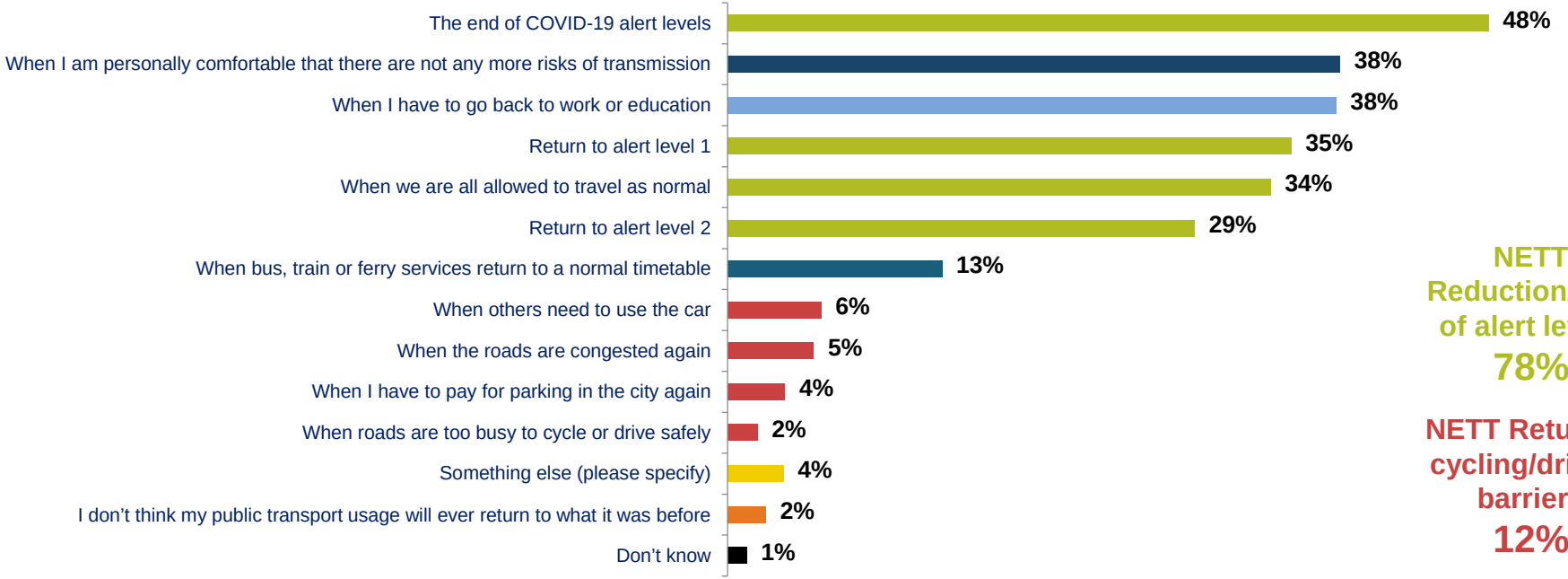
NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week. NET of public transport includes bus,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



QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?
Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); level 4 (n=5,060); level 3 (n=1,267);

Compliance with guidelines rather than transport barriers are seen as the likely drivers of a return to public transport, with *personal need* and *alert lifting* the dominant drivers

Triggers for returning to public transport usage in the future



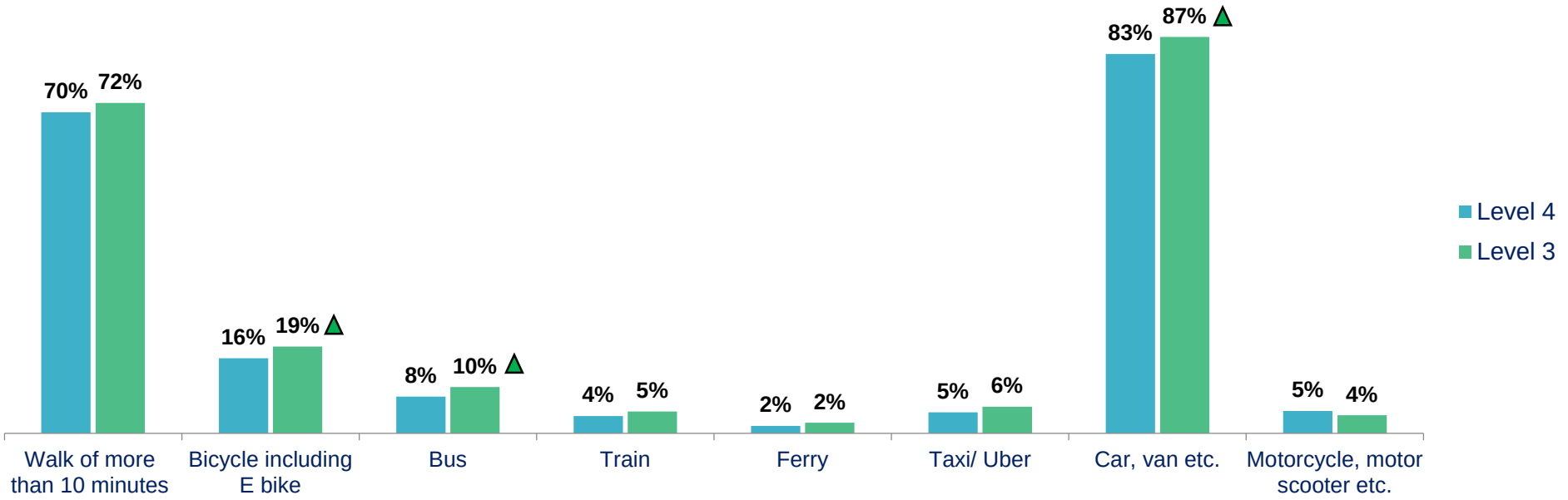
NETT Reduction/ end of alert levels
78%

NETT Return of cycling/driving barriers
12%

QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?
Base: all in wave 5 decreasing PT usage in past week (n = 217)

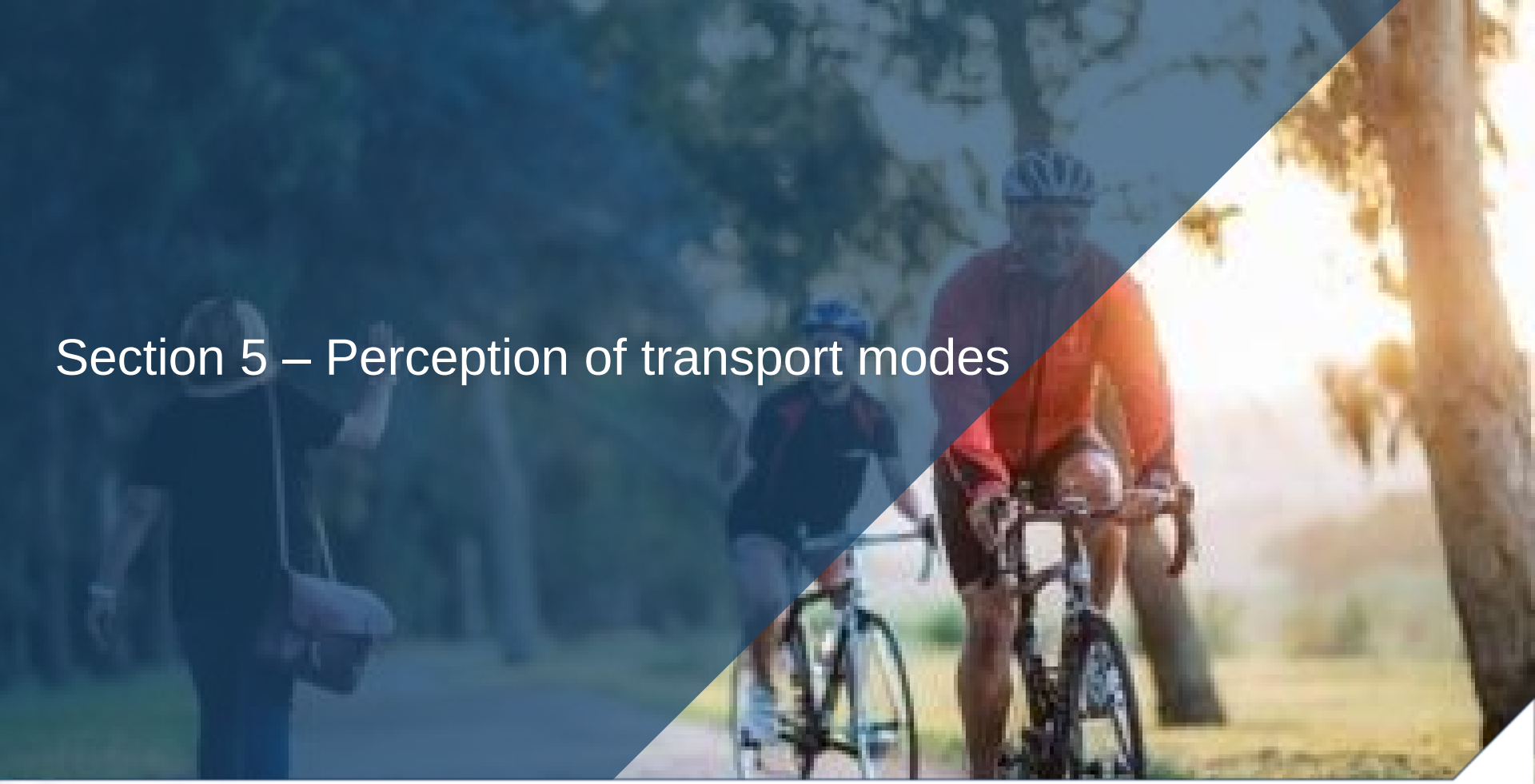
At the start of level 3, consideration of almost all modes has increased, with cars, bikes and buses seeing a statistically significant increase

Mode consideration: Coming week by alert levels



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=1,244)

Section 5 – Perception of transport modes



Key findings – perceptions

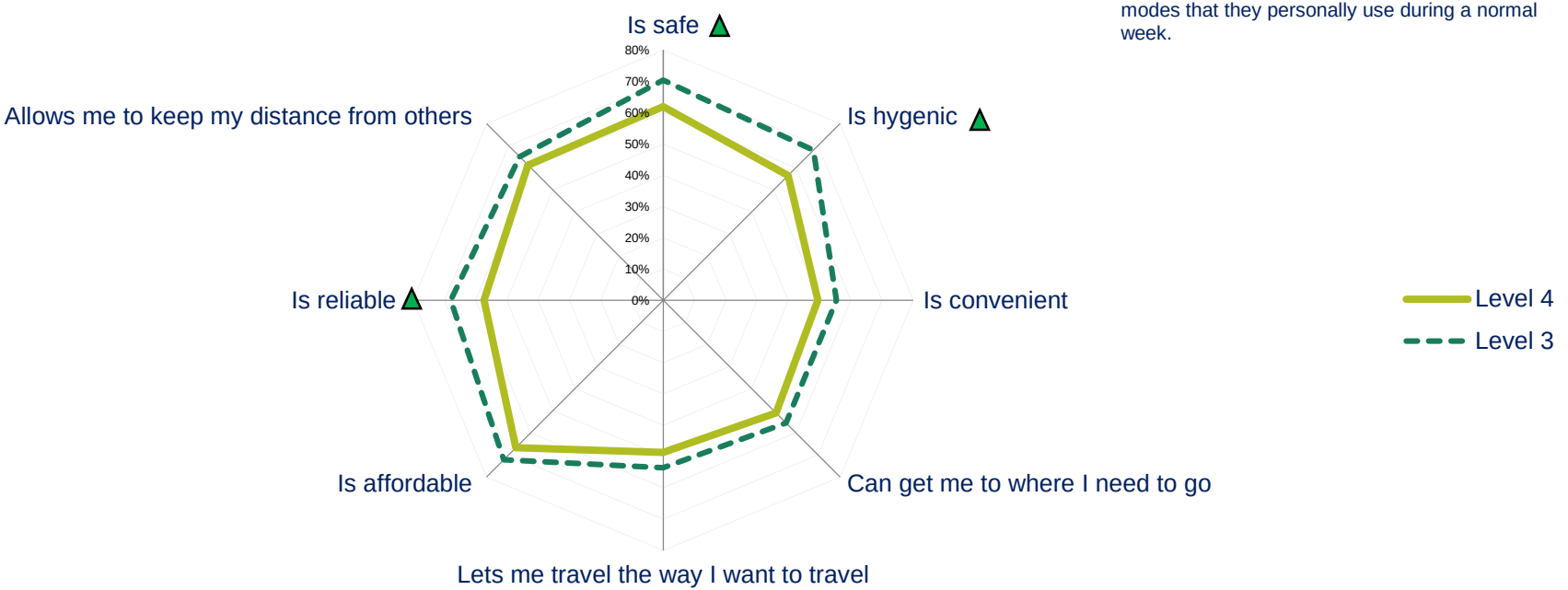
Waka Kotahi objective – how might people's perception of transport modes impact travel choices

- The COVID-19 environment may over time change the way that New Zealanders perceive different modes of transport. This will be important to understand as these perceptions may impact people's travel patterns and behaviour.
- Looking at the change from level 4 to level 3, there have only been notable changes in modal perceptions for buses and bicycles.
- Bicycles have always had stronger image performance on all metrics, particularly distancing and affordability, all of which has strengthened under level 3 conditions.
- Buses however, have performed more poorly on most image values throughout level 4, but have improved in some notable areas in level 3.
- Perceptions of hygiene and distance have barely improved at all for buses and may require focus as levels reduce further and people begin to travel more. Similarly, safety has not tangibly increased as a perception, although it has done better than hygiene and distancing.

The change to level 3 has seen perceptions of bicycles improve among users, particularly in safety and hygiene, where it was already strong

Perceptions of bicycle including E bike

NB: users were only asked about transport modes that they personally use during a normal week.

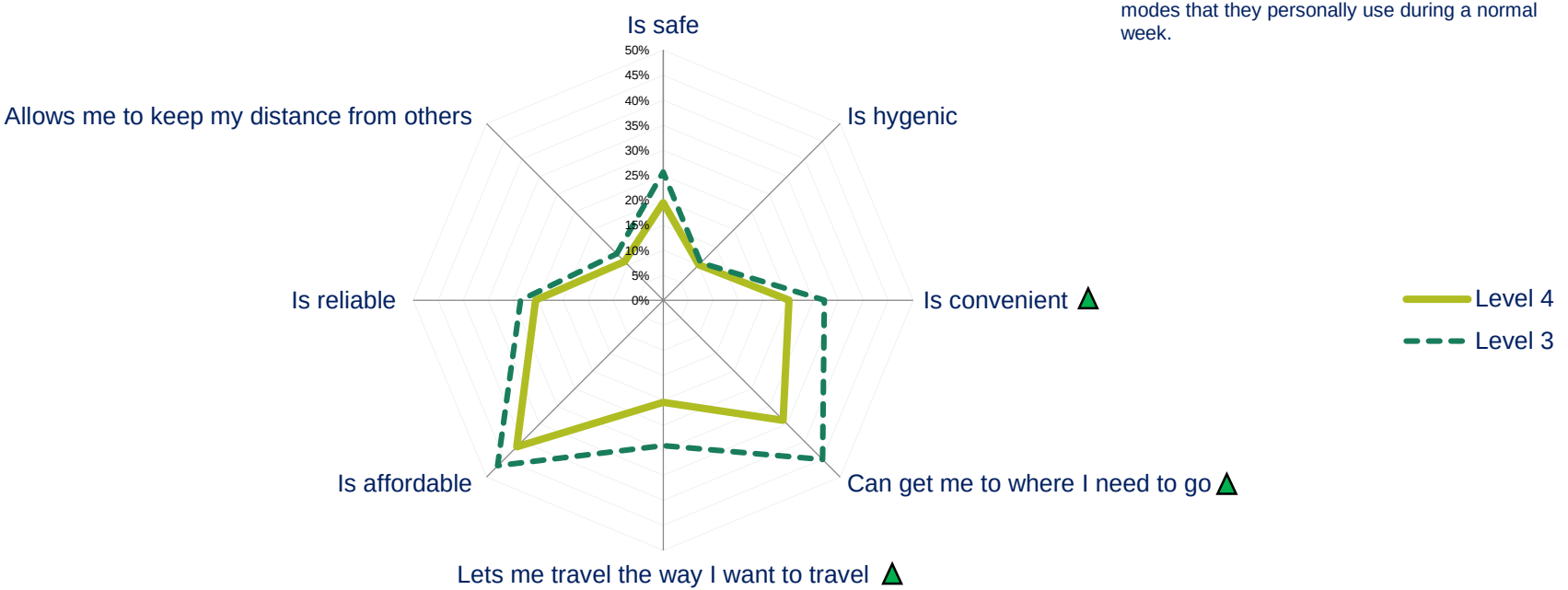


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who transport using Bicycle regularly: level 4 (n=771), level 3 (n=214)

Buses have also seen an image improvement in practical areas, but improving perceptions of hygiene and distancing needs to be done

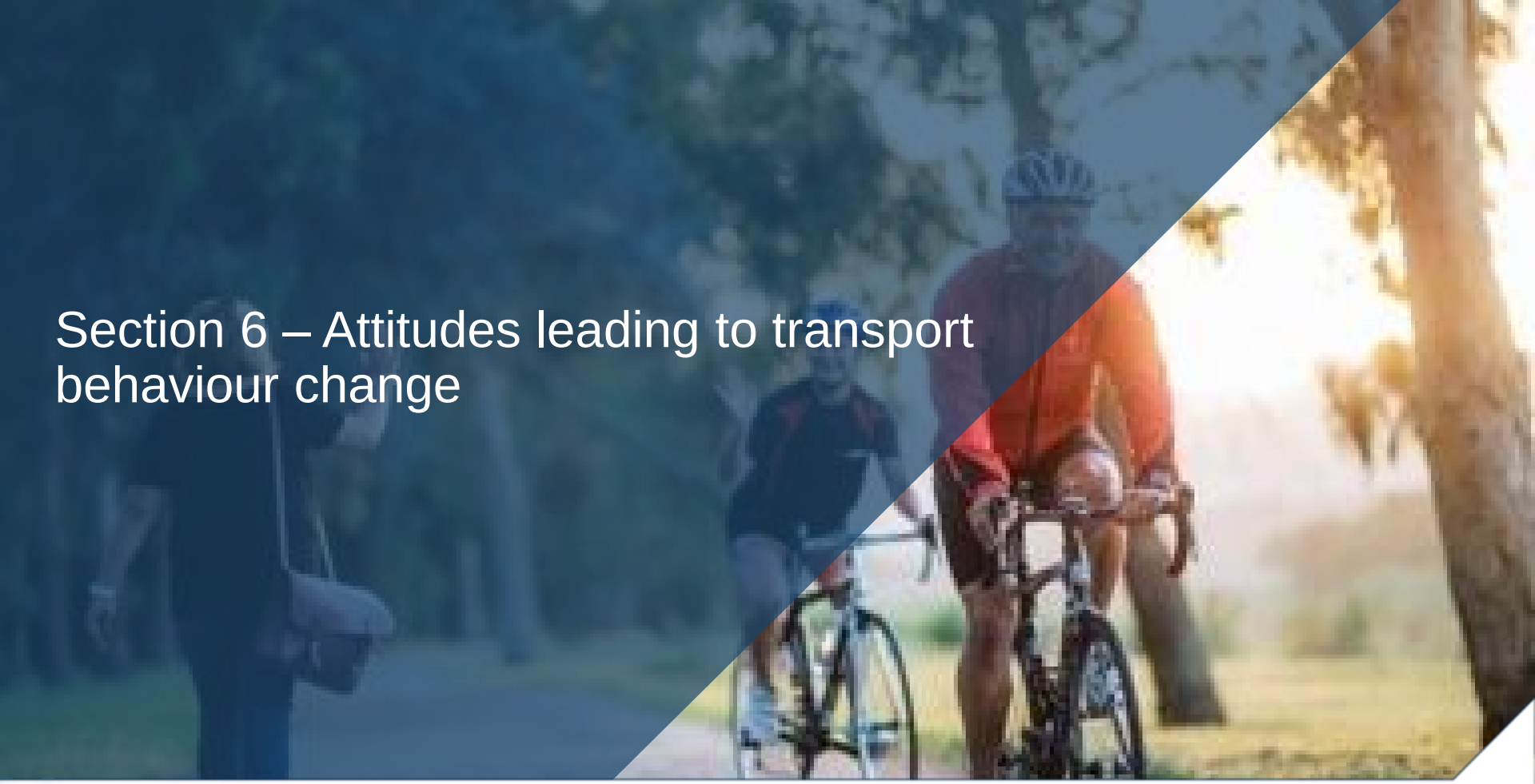
Perceptions of bus

NB: users were only asked about transport modes that they personally use during a normal week.



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who transport using Bicycle regularly: level 4 (n=953), level 3 (n=223)

Section 6 – Attitudes leading to transport behaviour change



We use an holistic model of understanding how to influence behaviour change

COVID-19 tracker MAPPS questions

MAPPS DIMENSION	MAPPS CATEGORY	WHAT IT MEANS	STATEMENT IN QUESTIONNAIRE
Motivation	Outcome expectations	I don't think it will work	Making changes to the way we get around will reduce the impact of COVID-19 on NZ
	Internalisation	I don't want to do it	I am personally very committed to following current travel/movement restrictions
	Self-efficacy	I don't feel able to do it	I don't feel able to get where I need to go
	Identity	I'm not that kind of person	I am not the type of person who would take a trip that is discouraged under the current alert level
	Emotion	I do not feel like doing it	Leaving the house worries me I worry about how I'm going to get the things I need
Ability	Capability	I am not able to do it	At the moment it's very hard to work out how to get to the places I need to go I feel confident I know what travel restrictions are in place when it comes to leaving the house
	Routines	It's not part of what I usually do	My daily travel routines are disrupted at the moment
Processing	Decision forces	How things are processed	I trust my own judgement when it comes to deciding when I go out and where I go
Physical	Structural factors	How things are set up	I can easily get to the places I need to go
Social	Cultural norms	The way we live	New Zealanders are looking out for each other by following current restrictions on travel/movement
	Social norms	The kind of thing expected of us	Most people are following the guidance around what journeys they can take

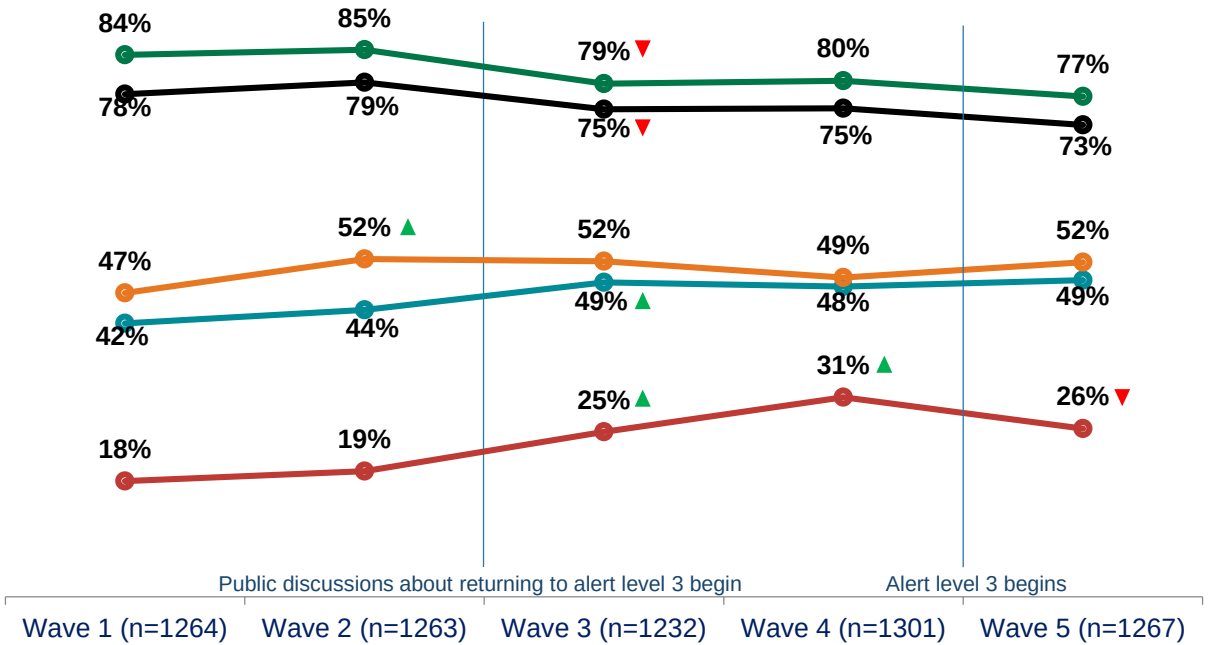
Key findings – attitudes

Waka Kotahi objective – understanding behaviour change

- This research has shown that New Zealanders are reporting reduced journeys during the level 4 lockdown period, so it is important to understand the prevalence of certain attitudes in this environment and how those might drive behaviour once restrictions are lifted.
- We now have sufficient data points to observe how attitudes shift as risk levels change over time.
- Following the switch to level 3 in wave 5, people still report high motivation to adhere to travel restrictions.
- Although there has been a marked decrease in those stating confidence in their knowledge of travel restrictions, the proportion reporting disrupted routines has started to decline.
- Social drivers indicate that people are feeling less confident about the adherence of others, which could risk undermining their own motivation to adhere to restrictions and further erode confidence.

Public discussions around level 3 restrictions appear, at this stage, to have had more impact on motivation factors than the actual end of level 4 restrictions has so far

Motivation factors



I am personally very committed to following current travel/movement restrictions
NETT Strongly/mostly agree

I am not the type of person who would take a trip that is discouraged under the current alert level
NETT Strongly/mostly agree

Leaving the house worries me
NETT Strongly/mostly disagree

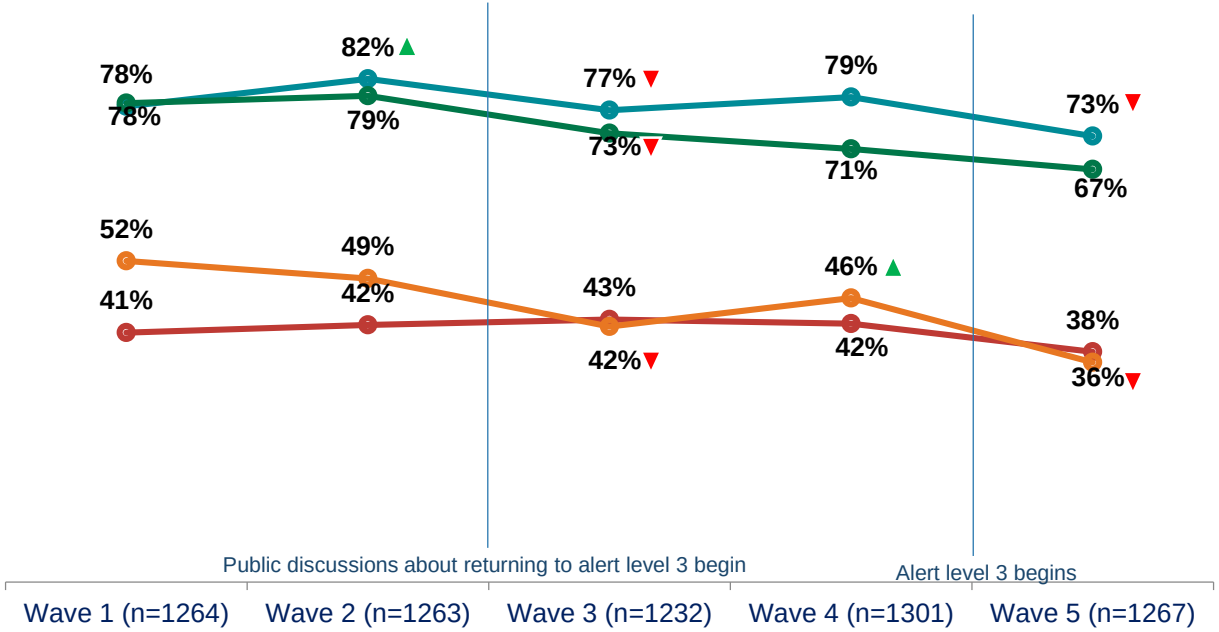
I worry about how I'm going to get the things I need
NETT All disagree

I don't feel able to get where I need to go
NETT All disagree

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

There has been a marked decrease in confidence around travel restrictions as we switch to level three and the proportion feeling their routine is disrupted has dropped

Ability factors + Outcome Expectation (motivation)



I feel confident I know what travel restrictions are in place when it comes to leaving the house

NETT Strongly/mostly agree

At the moment it's very hard to work out how to get to the places I need to go

NETT Strongly/mostly disagree

My daily travel routines are disrupted at the moment

NETT Strongly/mostly agree

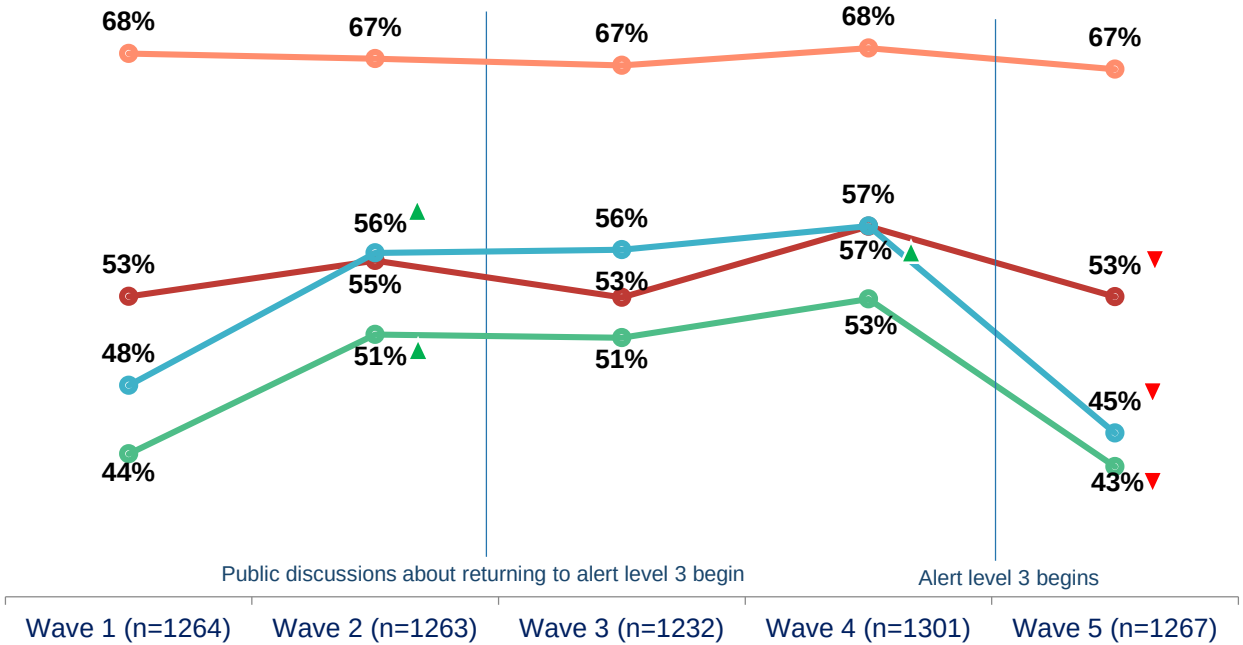
Making changes to the way we get around will reduce the impact of COVID-19 on NZ

NETT Strongly/mostly agree

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

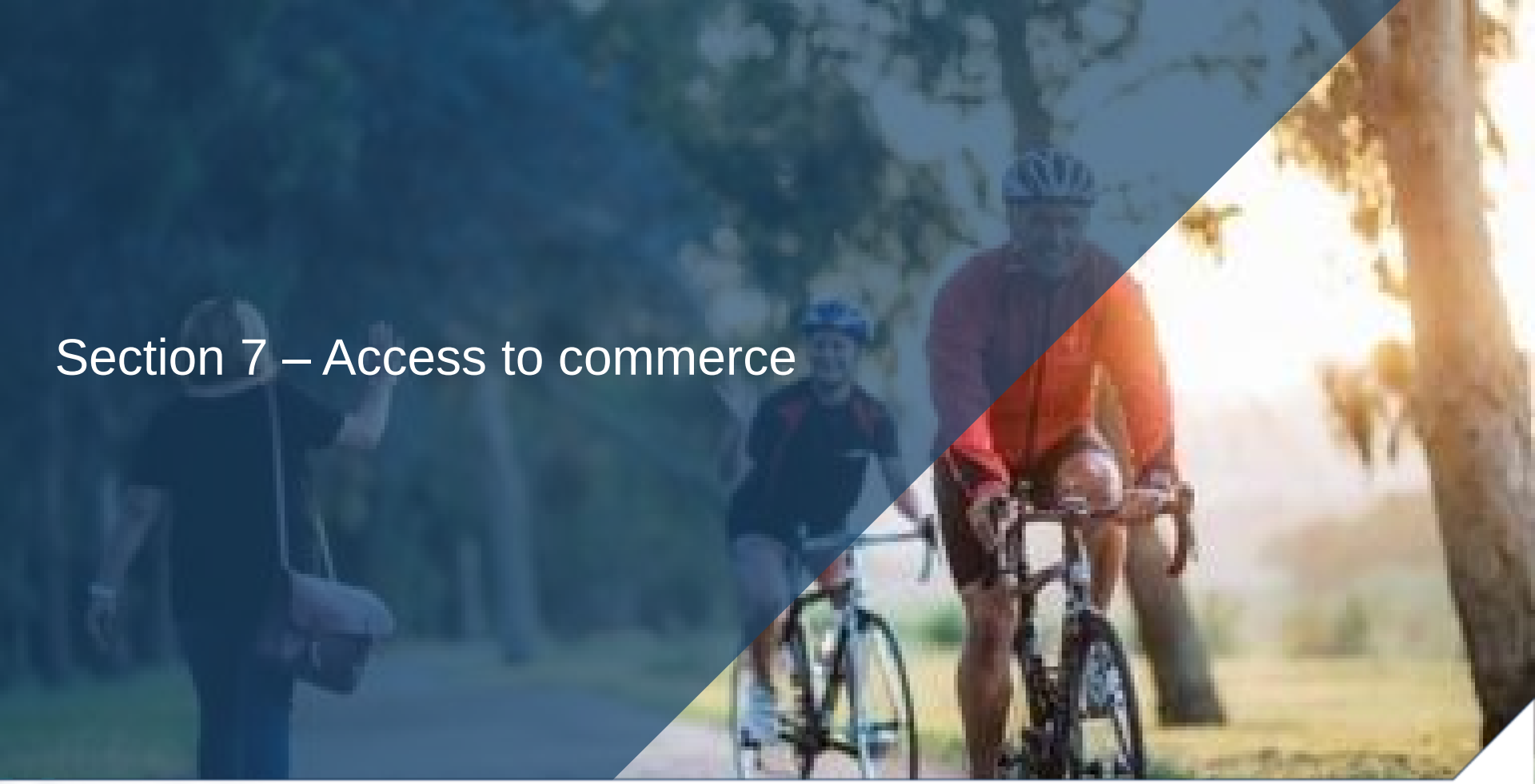
The most pronounced attitudinal change has come in social drivers as restrictions are relaxed and activity becomes more visible

Processing, physical and social factors (NETT strongly / mostly agree)



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

Section 7 – Access to commerce



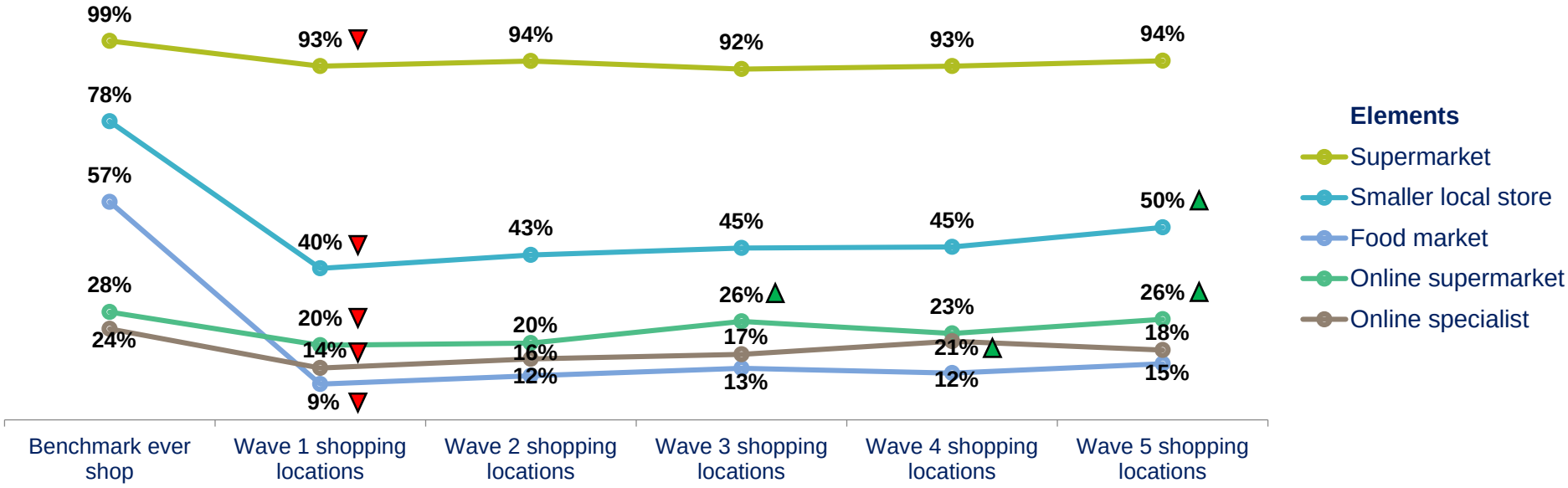
Key findings – access to commerce

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.
- In general people are adhering to shopping patterns established at the start of lockdown, but they continue to adjust to their situation, with the proportion saying shopping is harder decreasing for 3 consecutive waves.
- Level 3 restrictions have permitted “click and collect” services to open up for many businesses as well as home delivery. Around one in three of those ordering items online are using “click and collect” for at least some of their purchases, but delivery remains the dominant option.
- Those COVID-19 vulnerable and over-70 are more likely to choose delivery at this time.
- For those collecting purchases, private vehicles are the dominant mode used.

There has been a lot of variation over recent weeks in usage of online suppliers, with online supermarkets now back to the level of usage seen in wave 3

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

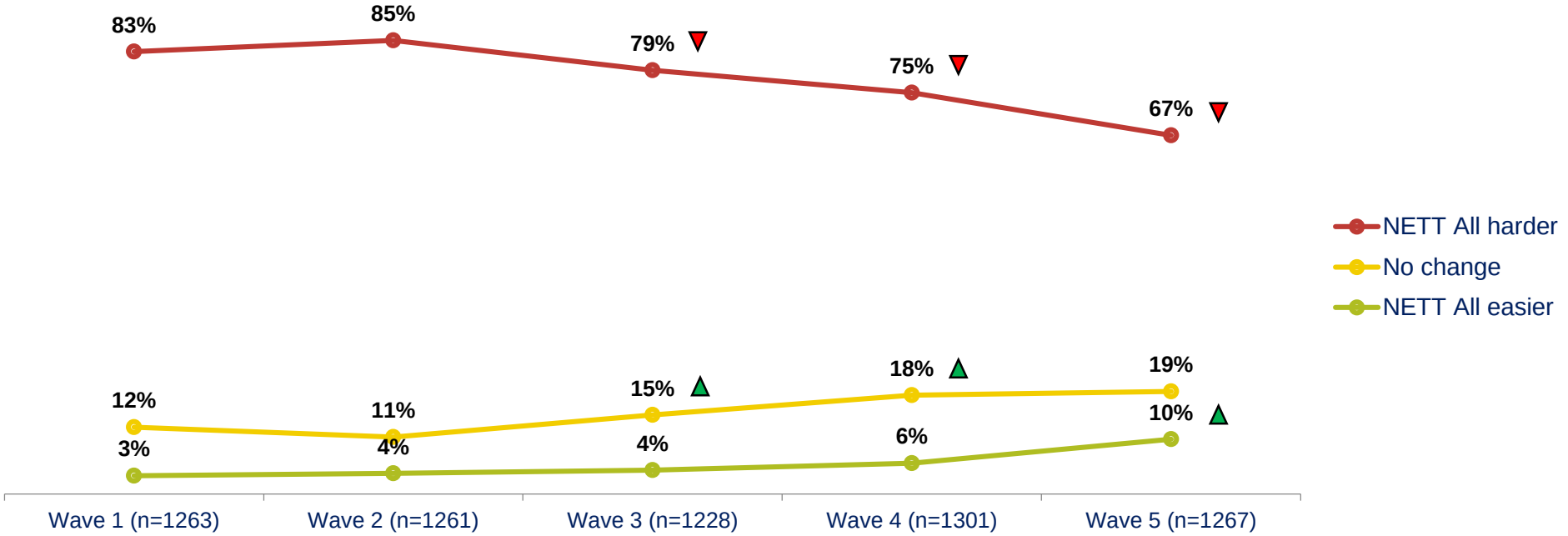


QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past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

Base: all adults who ever grocery shop in New Zealand, Benchmark (n=2,519); wave 1 (n=1,189) ; wave 2 (n=1,192); wave 3 (n=1,166), Wave 4 (n=1,238), Wave 5 (n=1,219)

Whether from forgetting the difference between pre-lockdown and current experience, or from adjusting to lifestyle, people are finding shopping easier to do

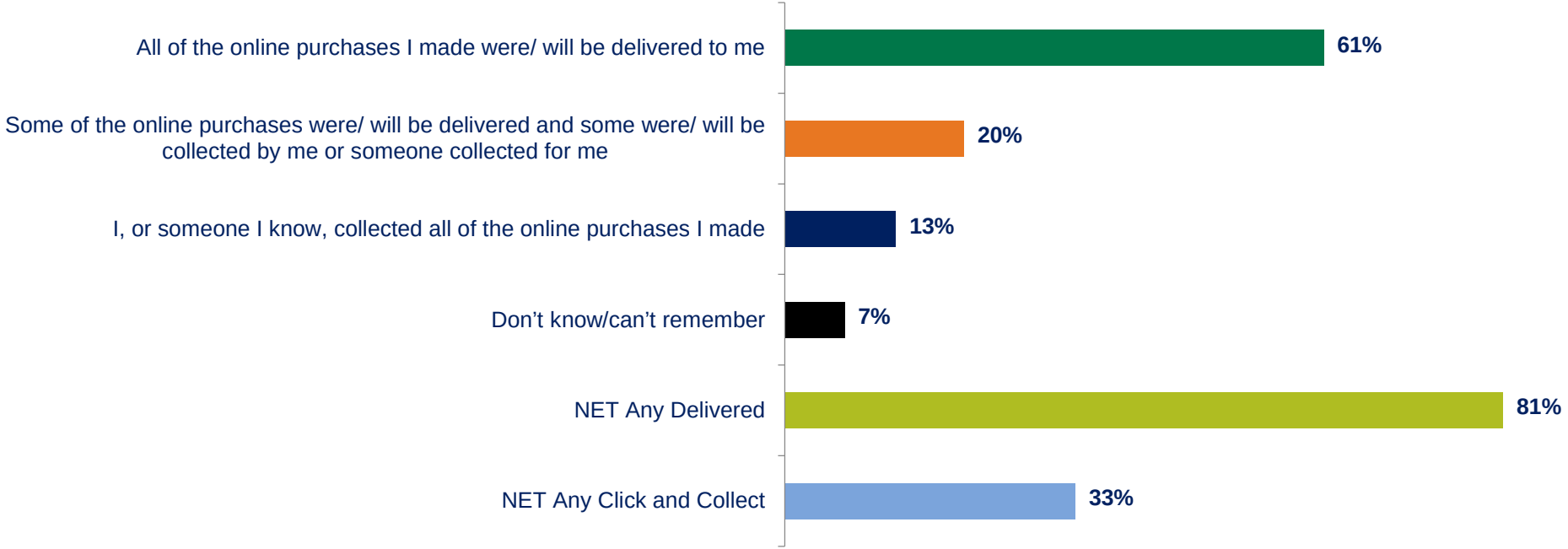
Relative difficulty of shopping in past week by survey wave



QSH2A. Shopping ease percentages - To what extent has shopping for the groceries and household essentials that you need been easier or harder during the past week than it was prior to any public health alert or lock down?
Base: all adults 15+ in New Zealand

A third of e-commerce customers indicated that they used a “click and collect” service at least once, but four in five received at least one home delivery

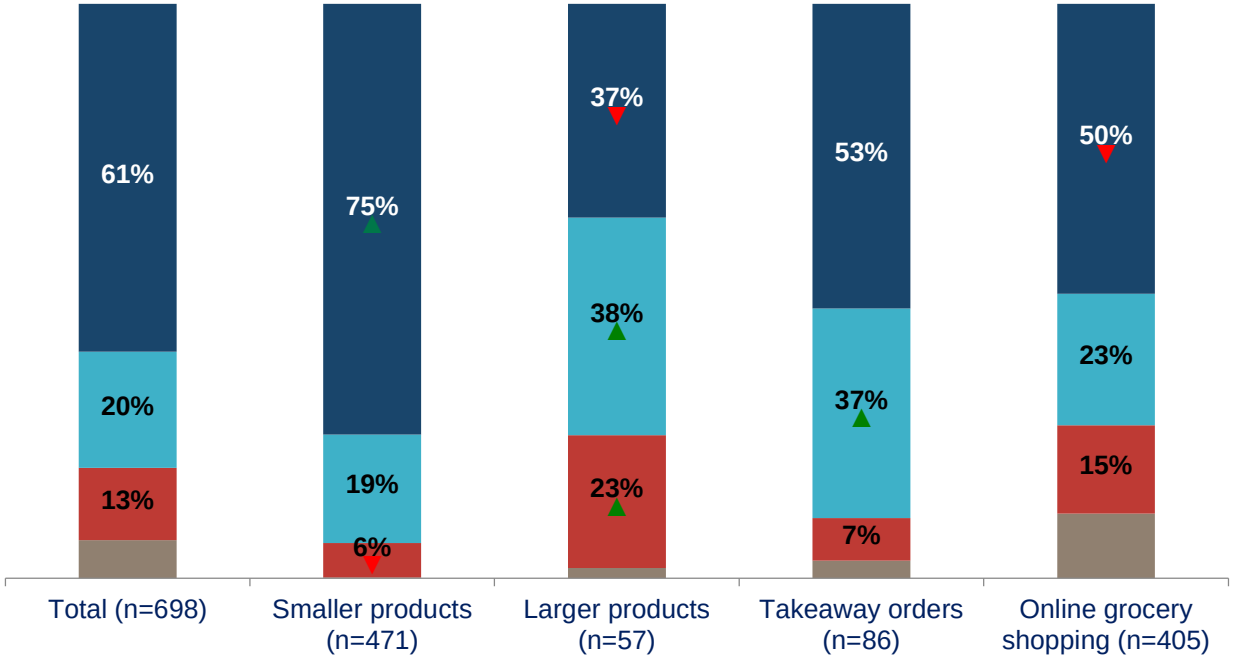
“Click and collect” or delivery



QSH4. And which of the following applies to the online grocery shop that you ordered this week? / And which of the following applies to the online purchases that you made this week?
Base:all adults 15+ in New Zealand online shopping online for groceries or other items (n=702)

Smaller products are most likely to be delivered rather than collected from the seller, perhaps because these are often bundled with other smaller products in an order

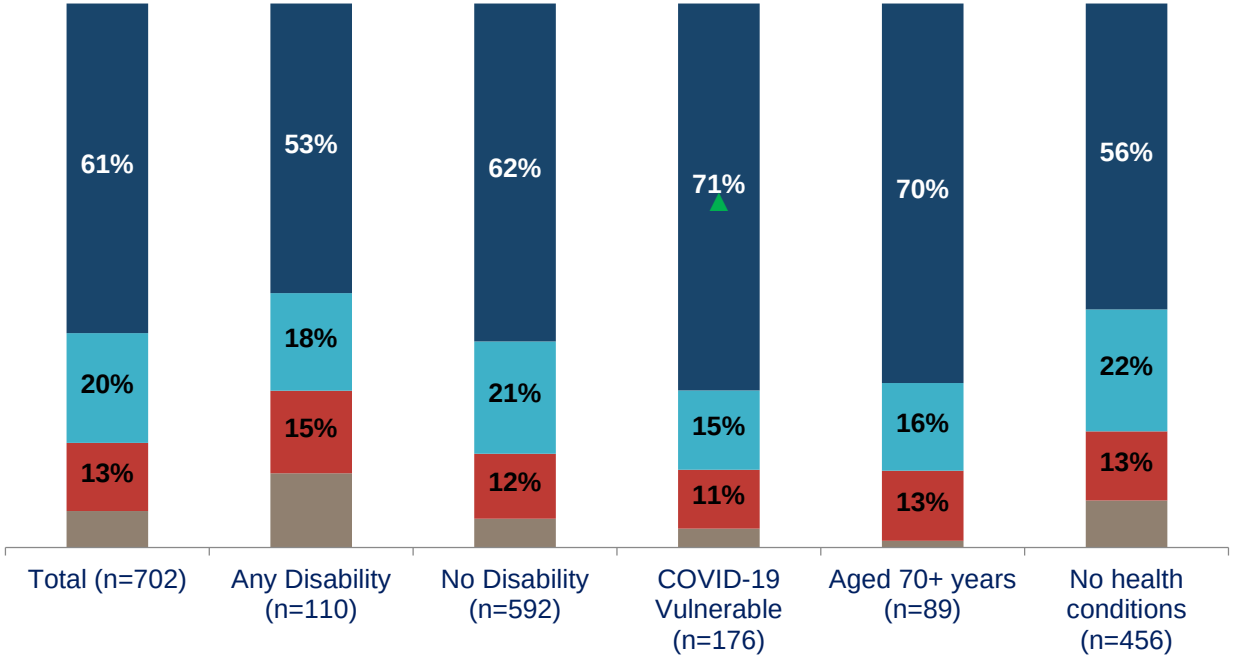
Transport mode used to "click and collect"



QSH4. And which of the following applies to the online grocery shop that you ordered this week? / And which of the following applies to the online purchases that you made this week?
Base:all adults 15+ in New Zealand online shopping online for groceries or other items

Those with greater COVID-19 vulnerability are most likely to order items for delivery instead of using “click and collect” services

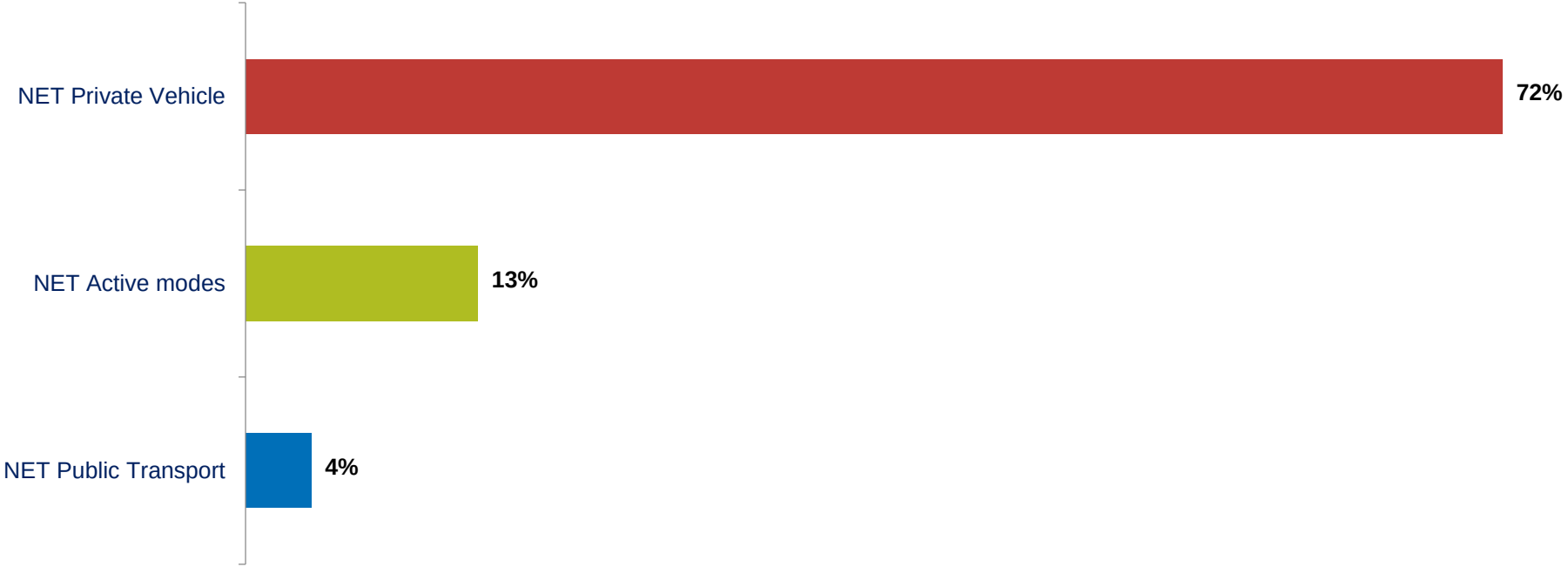
Transport mode used to “click and collect”



QSH4. And which of the following applies to the online grocery shop that you ordered this week? / And which of the following applies to the online purchases that you made this week?
Base:all adults 15+ in New Zealand online shopping online for groceries or other items

Private vehicles are the mode most used for “click and collect” services

Transport mode used to “click and collect”



QSH5. And how, if at all did/will you travel to collect this/these purchase/s?
Base:all adults 15+ in New Zealand collecting online shopping from vendors (n=230)

Section 8 – Returning to school

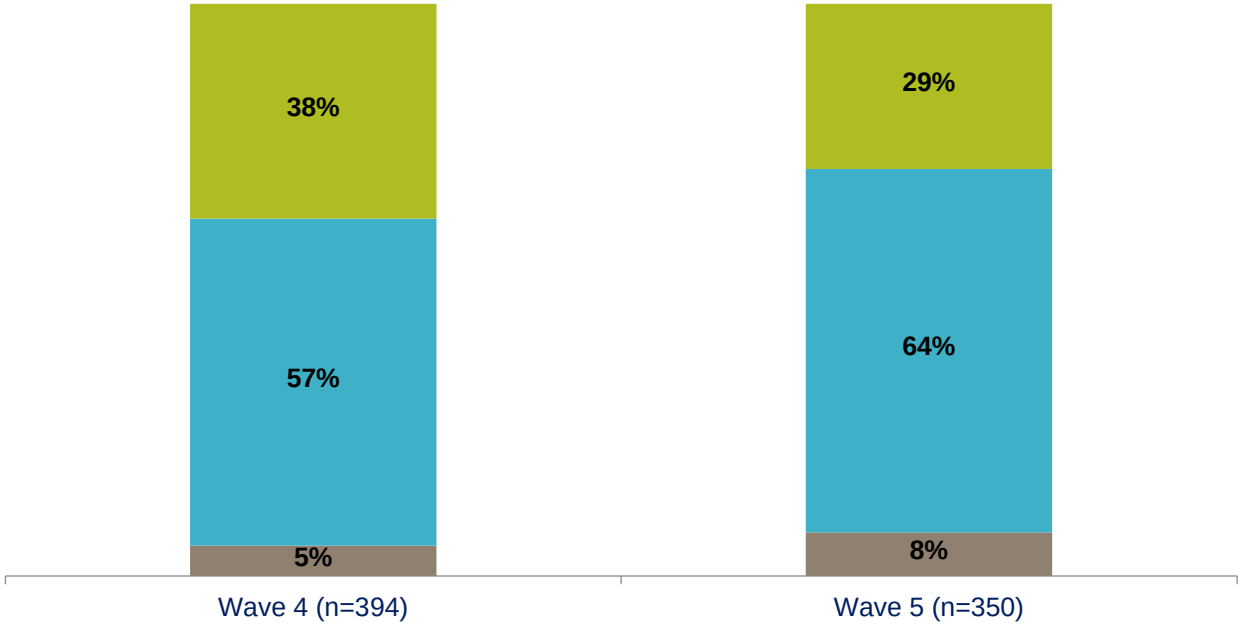
Key findings – returning to school

Waka Kotahi objective – how is travel changing?

- When restrictions were lifted to alert level 3 on 28th April, a number of children were permitted to return to school or pre-school across New Zealand. It is important to understand how the intention to return is likely to impact daily traffic on our roads and rails.
- Around one in three parents think that their children are eligible to return, of these about one in 10 say they have already returned their children to school, with a further 2% saying that they will do so this week.
- The majority of parents are still hedging, indicating that they will wait longer to decide or they just don't know when they will allow a return.
- This translates to a picture where only 3% of parents say that one or more of their children have returned to school at this stage. However, it's worth noting that the majority of parents say none of their children are eligible to return at this point.

In the 1st wave of level 3 alert, the proportion of parents who believe their children are eligible to return has fallen slightly

Children eligible to return to school

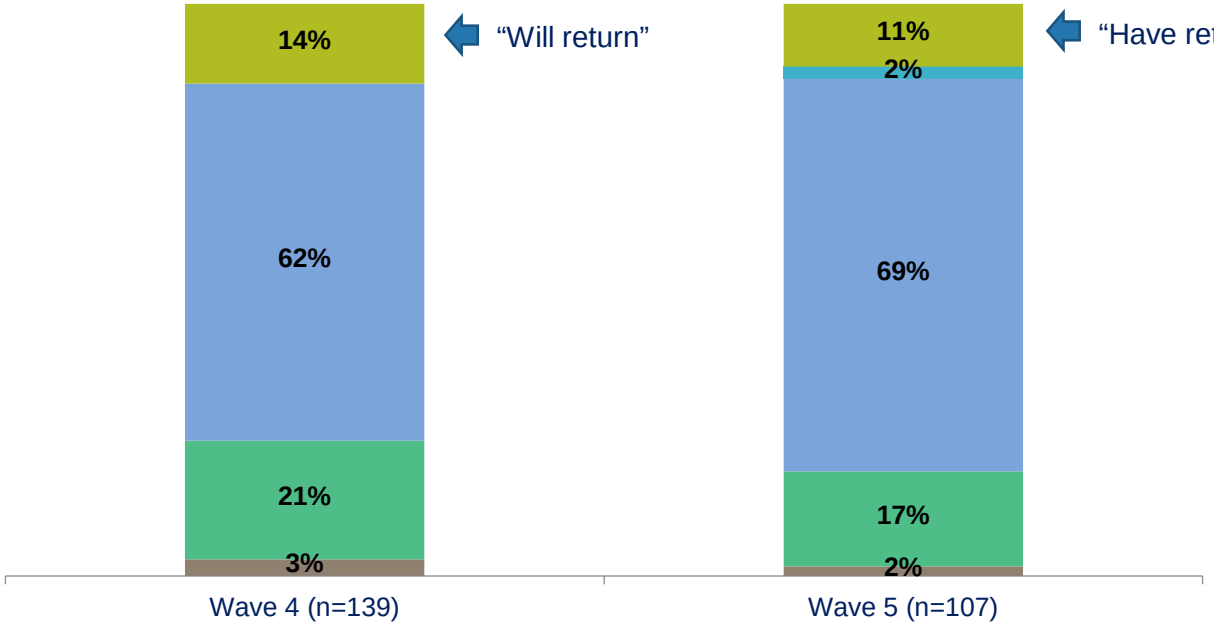


NB: official eligibility during level 3 is for children of essential workers.

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

Of those with qualifying children, approximately one in 10 say that one or more has already returned to school or pre-school

Intending / have returned children to school

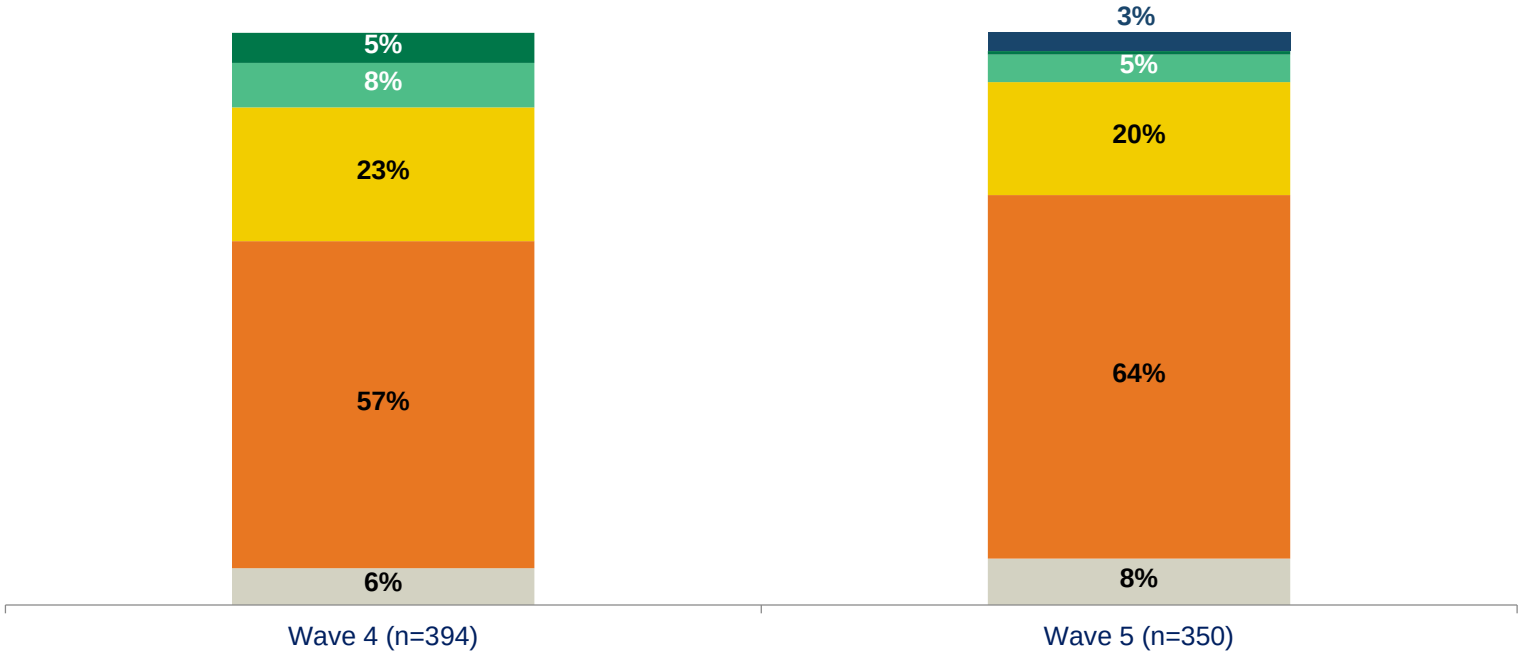


NB: official eligibility during level 3 is for children of essential workers.

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

From our sample there hasn't been a significant change in the proportion projected to return to school in the short to medium term

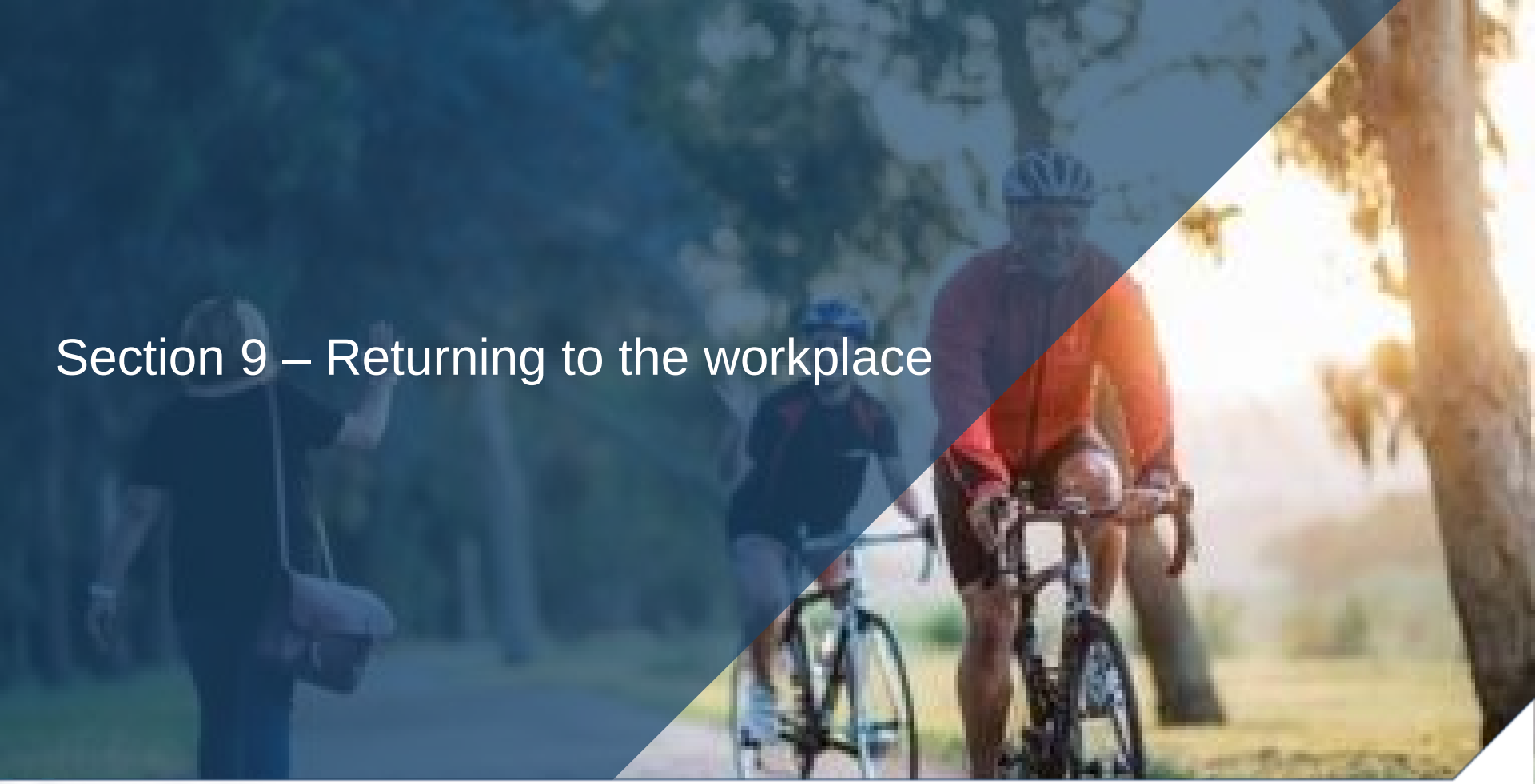
Intending / have returned children to school



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

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

Section 9 – Returning to the workplace



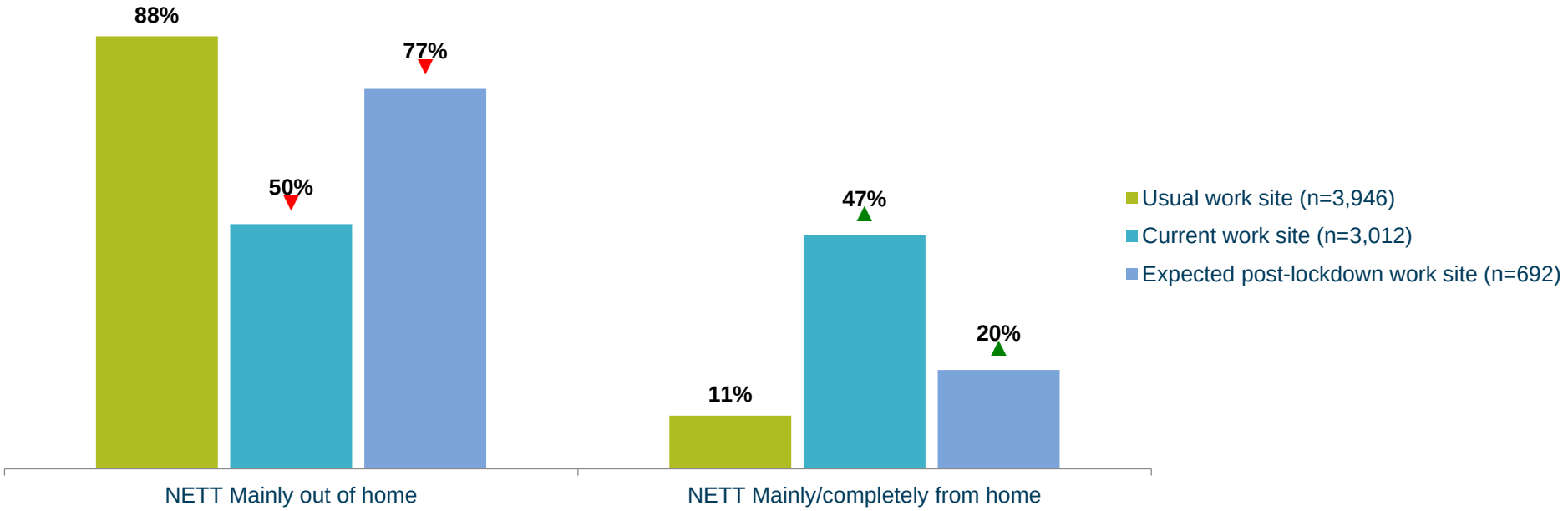
Key findings – returning to work

Waka Kotahi objective – how is travel changing?

- The advent of level 3 has meant that more workers are able to return to their normal workplace, and perhaps an even greater proportion are able to start thinking about and making preparations for such a return.
- While the majority think that they will go back to their normal workplace, the expectations of workers indicate that when restrictions end there could be a decrease in commuter traffic compared to pre-lockdown levels.
- Workers' preference for post-lockdown work site generally adheres to what their pre-lockdown situation was. However, there is a sizable proportion expressing a specific desire to continue working from home at least to some extent.
- When looking at the relationship between post-lockdown expectation and post-lockdown preference, it's clear that those who desire a return to their usual workplace also expect that they will be able to and vice versa.

88% say they normally work outside of home, with most of these people expecting to return to the workplace post-lockdown restrictions

Usual, current and expected work site

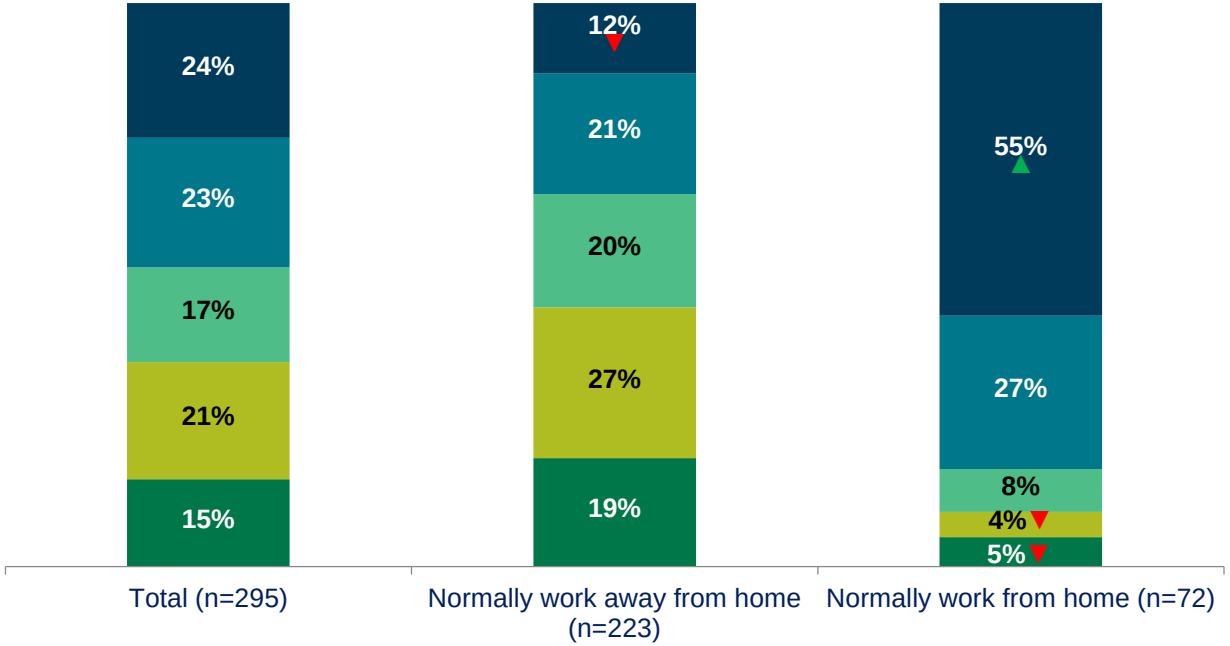


QWORK1A/QWORK2A/QWORK7A . And prior to any public health alert or lockdown, where did you mainly work? / And where do you currently work? / And where do you expect to be working immediately following the end of the lockdown?

Base:all working adults in New Zealand

Around a quarter want to continue to work from home; however, this pattern generally reflects their usual working situation, rather than a preference for change

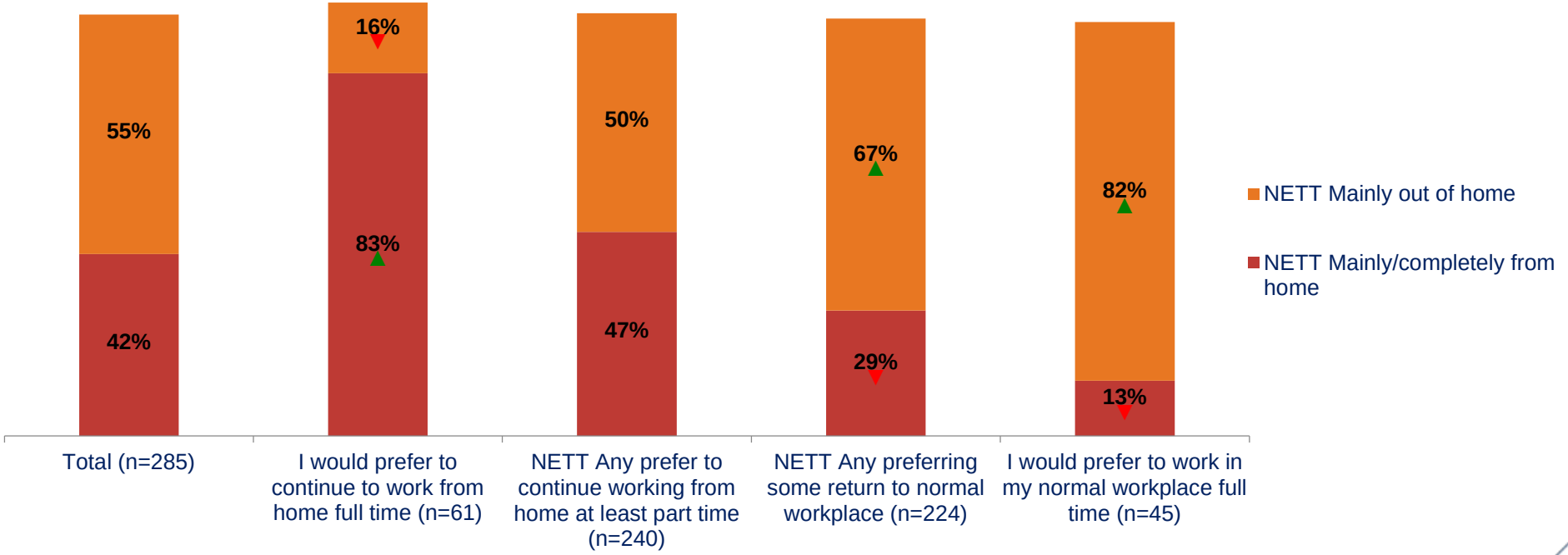
Preferred post-lockdown work site by normal (pre-lockdown) work site



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 currently working from home(n=295)

Expected return to workplaces also adheres closely to preference

Expected post-lockdown work site by preferred post-lockdown work site



QWORK7A And where do you expect to be working immediately following the end of the lockdown?
Base:all adults in New Zealand currently working from home and expecting to work post lockdown (n=285)

RICOCHE