

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–9 weekly core report

3 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

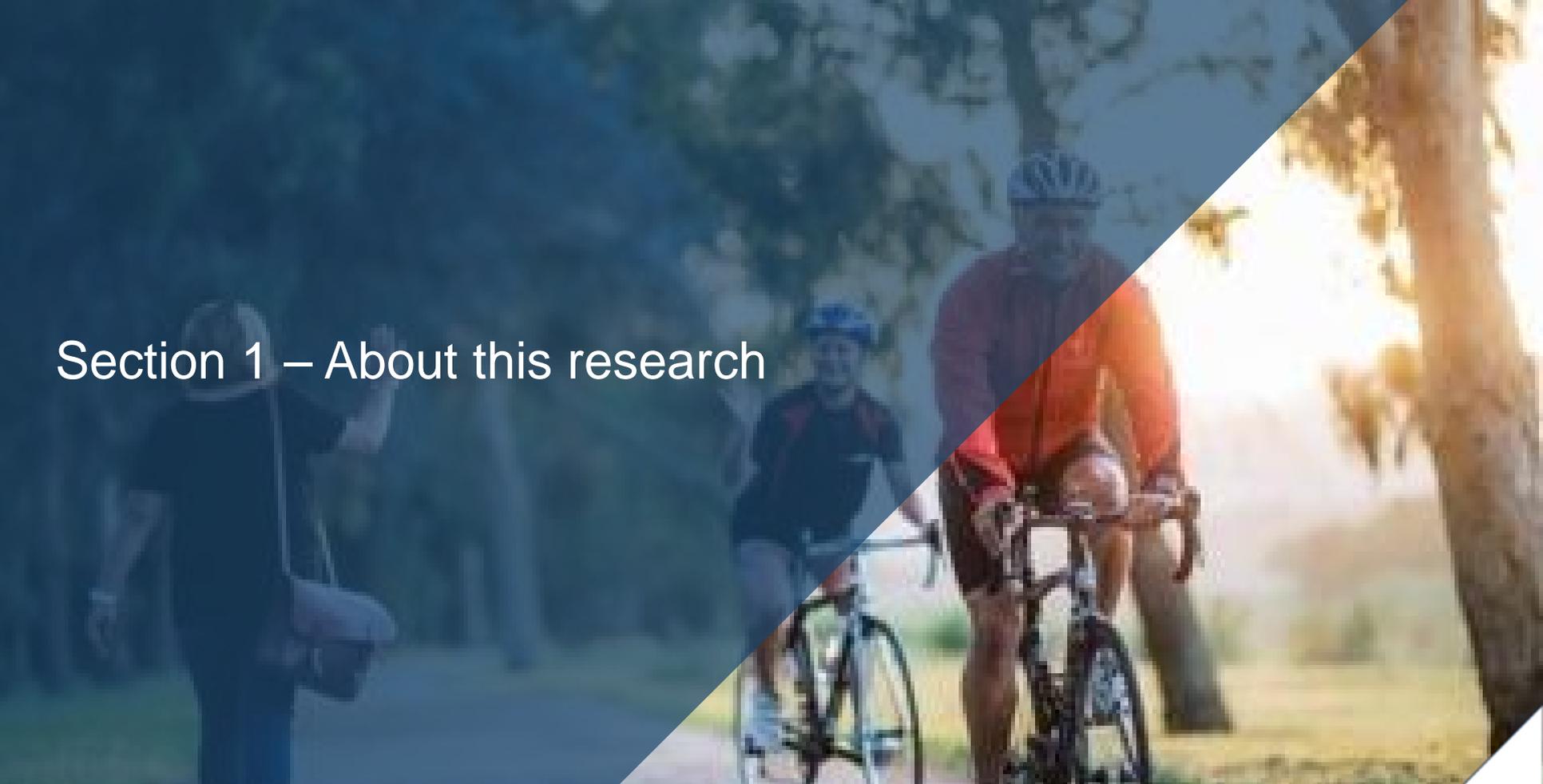
While Waka Kotahi provided investment, the research was undertaken independently, and the resulting findings should not be regarded as being the opinion, responsibility or policy of Waka Kotahi or indeed of any NZ Government agency.

For more information on the Covid-19 weekly tracker contact:
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Report content

COVID-19 transport impact

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Section 1 – About this research

Study purpose and importance

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

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

To understand **how travel is changing** and evolving in response to COVID-19 on a 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 nine waves of fieldwork, see table ►
- Total 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 and 9, 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 9 report is based on a statistically significant shift of results between waves 1 to 9, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs. combined level 2 alerts.
- 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	

Report notes (ii)

Key transport terms and demographic groupings

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

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

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

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

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

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

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

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 9		Wave 9	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*
Total		n=5,060	1.38	n=2,532	1.95	n=3,782	1.59	n=1,255	2.77
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=993	3.11	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=300	5.66	n=100	9.8
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=300	5.66	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=610	3.97	n=179	7.32
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=300	5.66	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=293	5.73	n=93	10.16
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=986	3.12	n=352	5.22
Disability, Vulnerability and COVID-19**									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=458	4.58	n=162	7.7
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=836	3.39	n=262	6.05
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=481	4.47	n=155	7.87

*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.

Context: New Zealand COVID-19 timeline





Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1 – 9

Waka Kotahi COVID-19 transport impact tracker

- After over two weeks in level 2, New Zealanders have settled into level 2 alert conditions, with travel habits and journeys reflecting this reality.
- Contextually, worries about COVID-19 transmission have steadily declined throughout lockdown, but only in level 2 has there been a decrease in economic concerns.
- As transmission concerns wane, so too do worry-related motivations to adhere to travel restrictions. Stated disruption to travel is now also at its lowest level, while social norms related to adherence continue to decline.
- Local journeys increased at the beginning of level 2, but there has not been a significant increase wave-on-wave for most journey types since then.
- The proportion claiming to use public transport at least once a week has levelled out following gains at the start of level 2. **Note that this does not reflect the volume of trips being made, just the proportion travelling at least once in a seven-day period.**
 - Consideration of public transport modes has also plateaued after sharp increases at the start of level 2, with bus consideration still some way short of pre-alert usage.
 - Although public transport usage is increasing, private vehicles are the dominant modes for the types of non-essential journeys that people are now able to make.
- Almost half have made domestic journeys between regions, with trips to visit family and friends the dominant longer-distance journey taken.
- When it comes to domestic journeys and domestic tourism, the desire to see family and friends is still a bigger draw than anything else, although the expectation of New Zealanders is that their domestic tourist travel will decrease compared to a comparable period last year.
- The majority of workers are returning to their normal workplace, although these people report slightly fewer commuting days than in pre-lockdown conditions.
- Among the declining proportion still working from home, motivation, perceived opportunity and confidence in ability to do so is stronger than it was among what was probably a more mixed population in previous waves.



Section 3 – COVID-19 context

Key findings – COVID-19 concerns

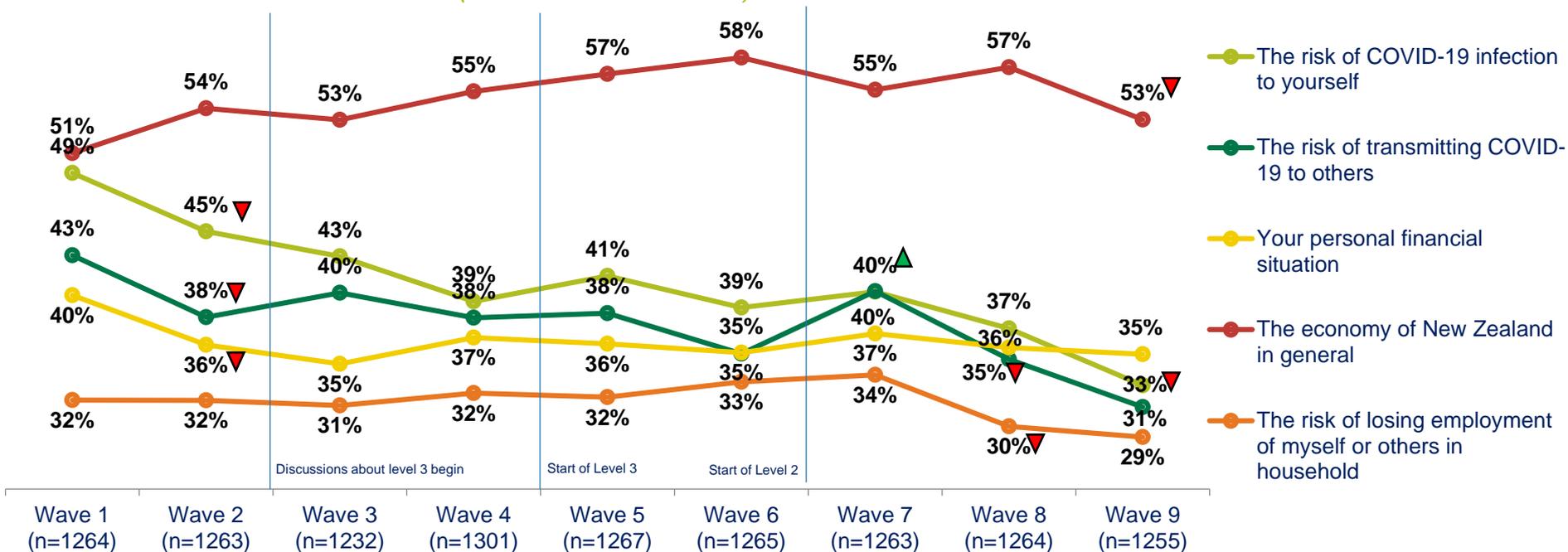
Waka Kotahi objective – levels of personal concern around the impact of COVID-19

- People's concerns around COVID-19 will have an impact on what they perceive as risky travel behaviour. Understanding these concerns will help us to frame their responses in an established mindset.
- In the most recent wave, health and transmission concerns have continued to decline, as they have since the beginning of lockdown.
- Even economic concerns, which have generally been stronger, have begun to trend downwards, with concern about the NZ economy at the lowest level since wave 3.
- Concern about *personal* finances is the only element to remain stable throughout level 2 and has been roughly the same since the final weeks of level 4 conditions.
- People express greater concern about the wider community and the world at large than they do about their own personal situation and local area in managing the lockdown, although concerns about the neighbourhood and wider community have trended downwards in level 2.



Concerns about COVID-19 transmission, employment and the economy have declined gradually in level 2, although financial concerns are among the more stable

Health vs economic concerns (NETT all concerned)



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



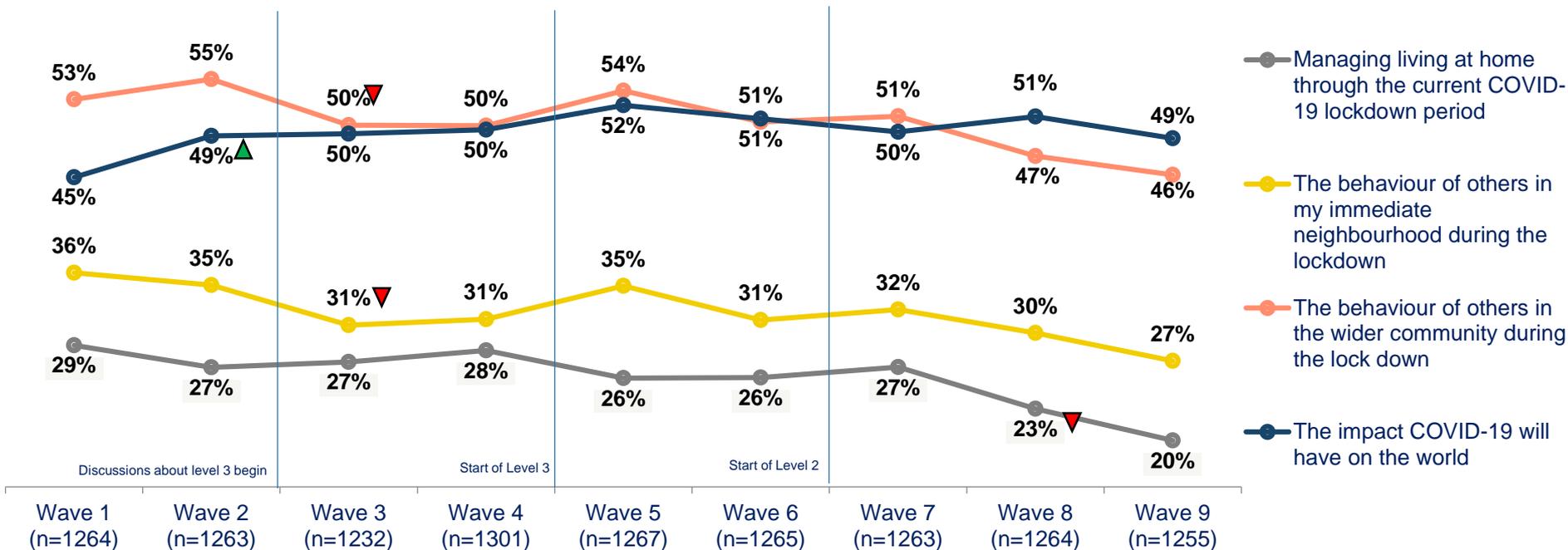
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

New Zealanders have always been less worried about issues closest to home, but there's been a steady decline in concerns about the immediate & wider community

Living under lockdown (NETT all concerned)



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





Section 4 – 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 New Zealand
	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
	Routines	It's not part of what I usually do	I feel confident I know what travel restrictions are in place when it comes to leaving the house 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

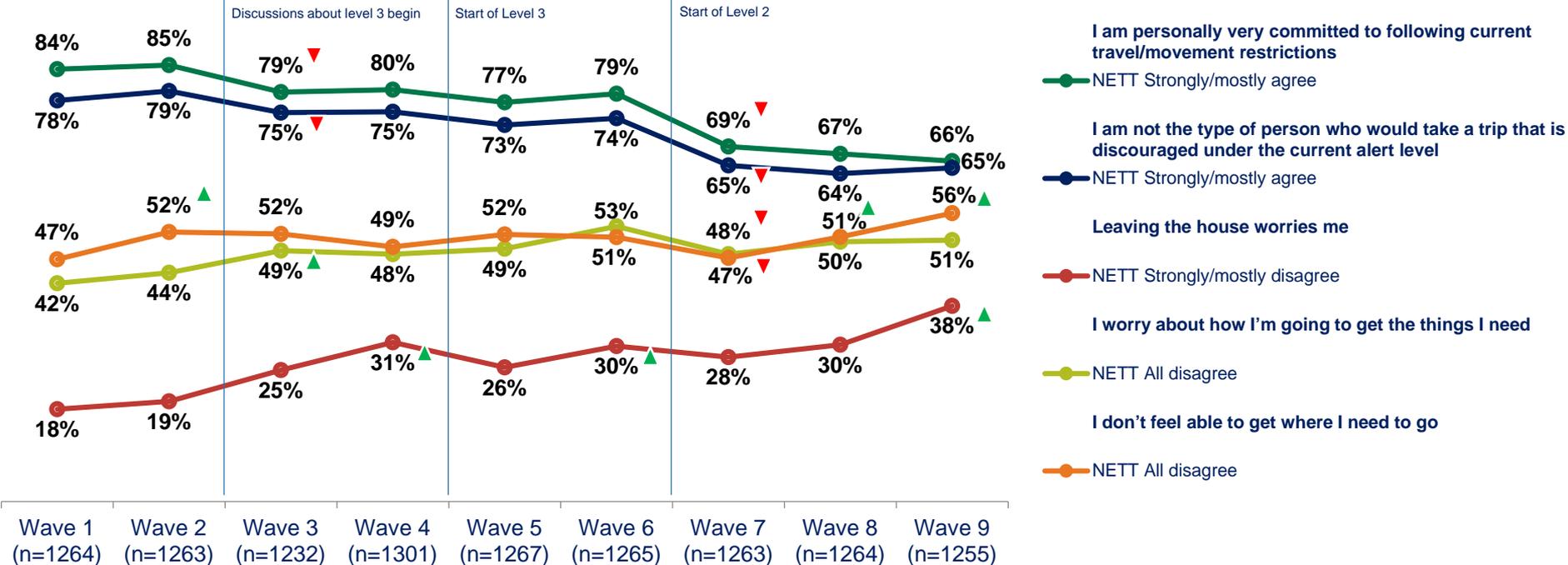
Waka Kotahi objective – understanding behaviour change

- This research has shown that more journeys are being taken as we adjust to level 2 conditions, so it is important to understand the prevalence of certain attitudes in this environment and how those might drive behaviour.
- The proportion *not* worried or concerned about getting around has increased across level 2 at the same time that stated concern around COVID-19 transmission have declined (as shown earlier).
- There is a sense of a return to normal as the proportion feeling their travel routines are disrupted is at its lowest level and the proportion disagreeing that it's hard to know how to get where they need to go increases across level 2.
- In line with this, the proportion saying that they can get where they need to go easily has recovered strongly in the past 2 weeks.
- While there's been no statistically significant change in wave 9, the level of social buy-in has continued to decline.



Commitment and buy-in to restrictions have levelled after a steep decline at the start of level 2, while the proportion *not* worried or concerned about getting around rises

Motivation factors



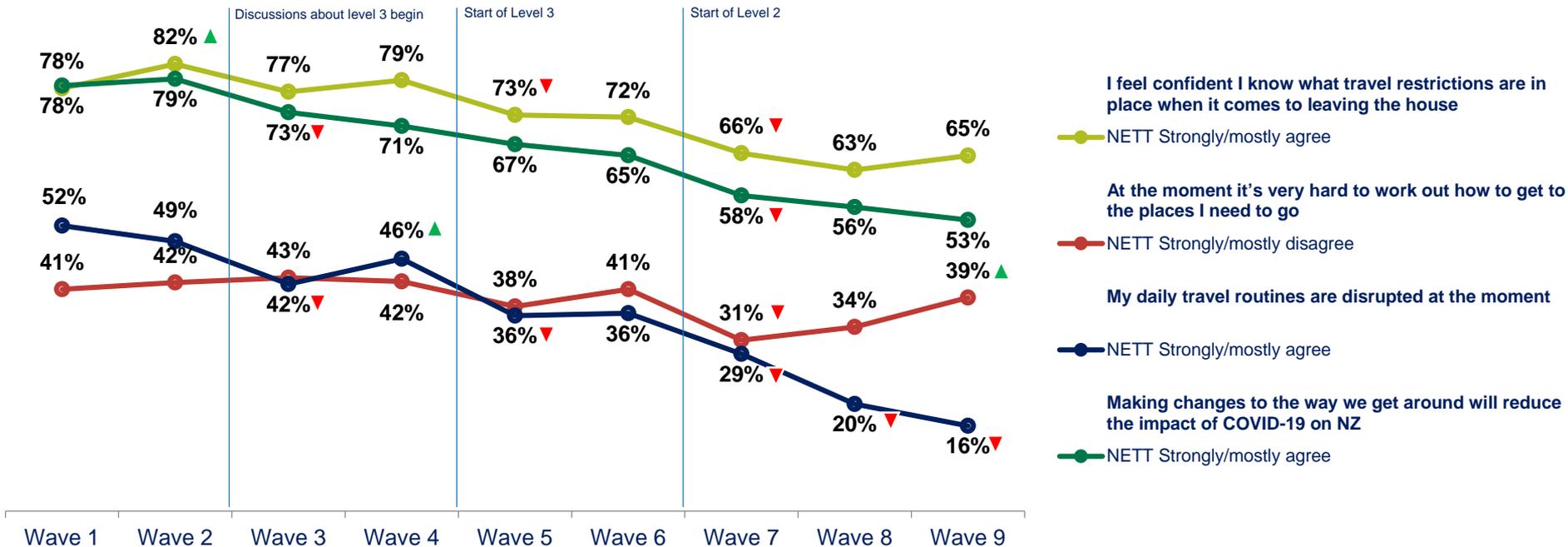
QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand



There has been a marked increase in those confident about knowing how to get around, while the proportion feeling disrupted is now very low

Ability factors + outcome expectation (motivation)

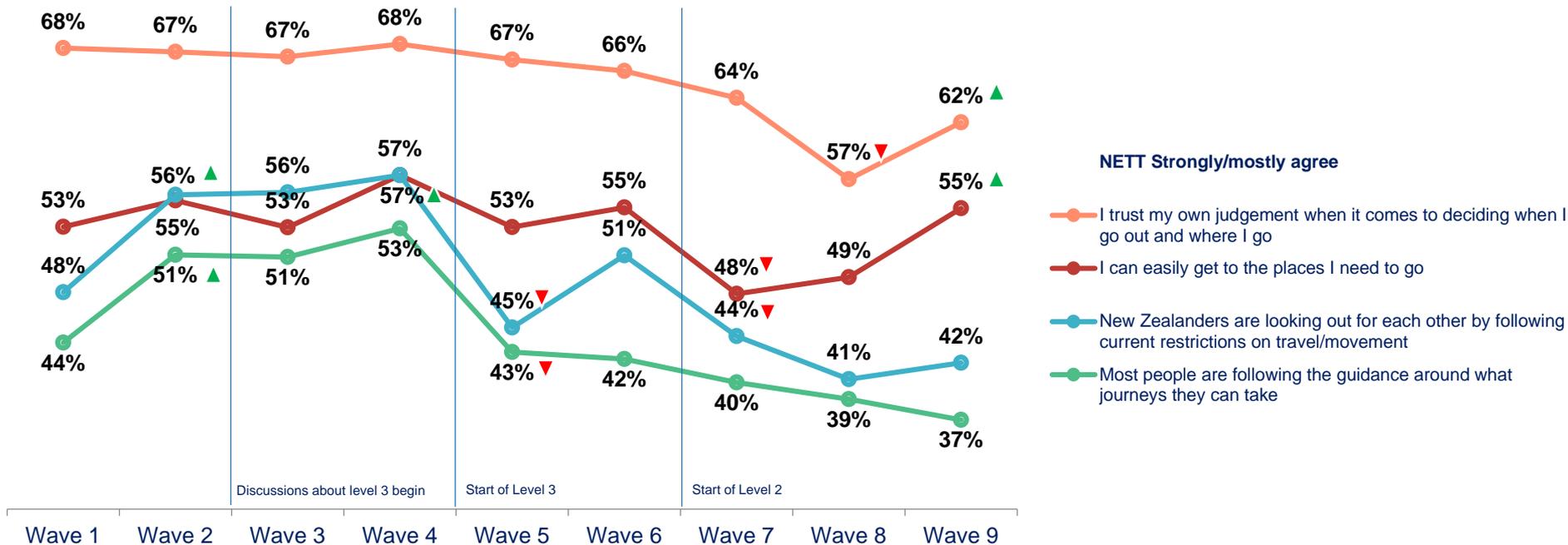


QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand

In the most recent wave, the proportion trusting their own judgment and feeling they can get where they need has strongly recovered

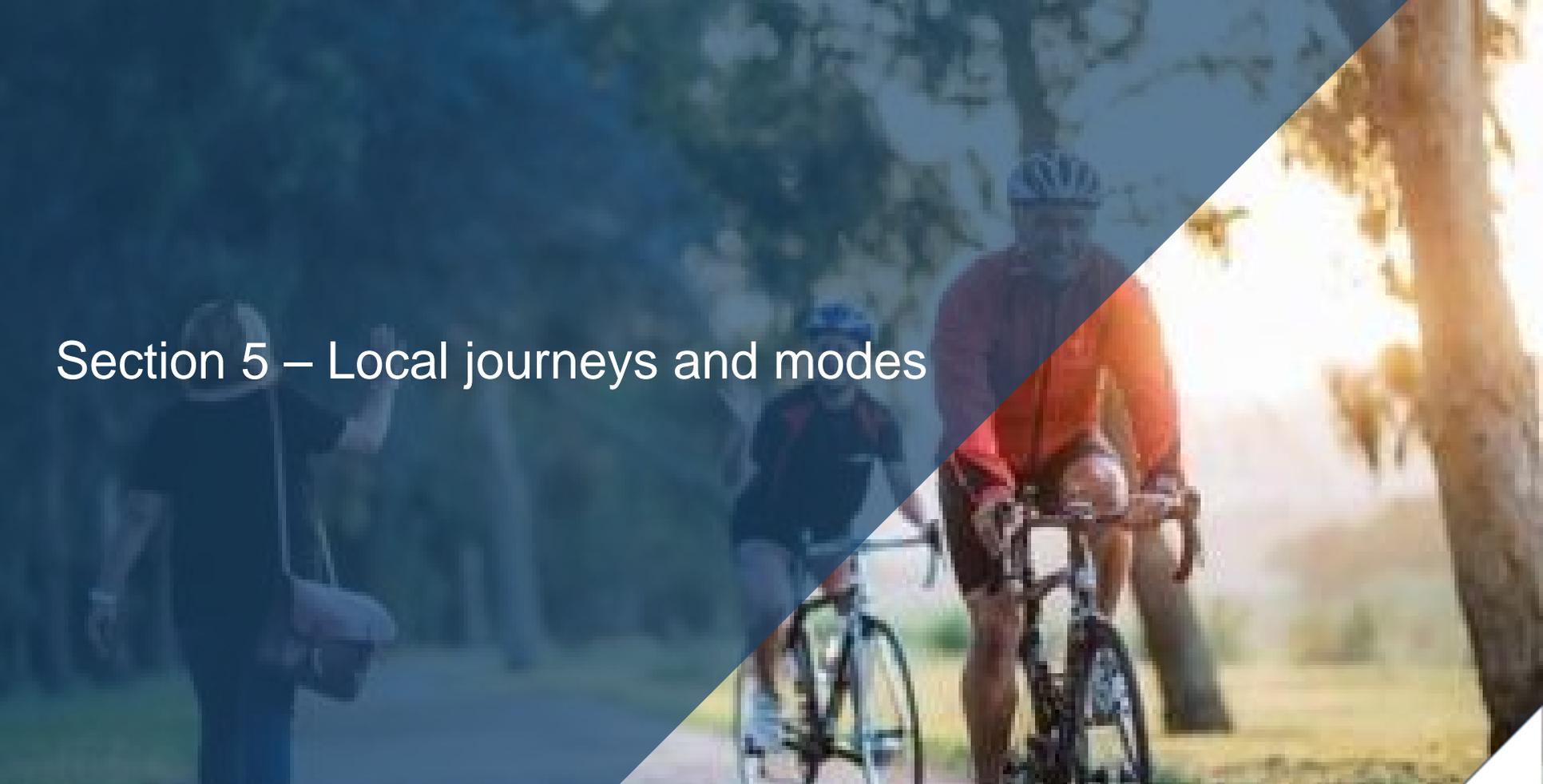
Processing, physical and social factors (NETT strongly / mostly agree)



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



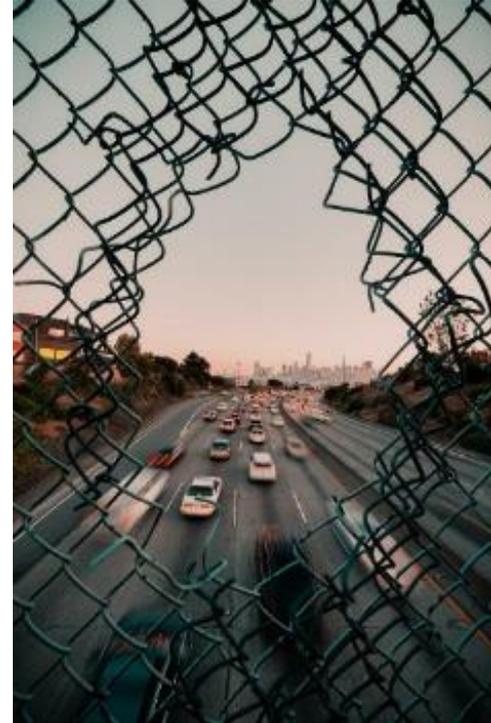
A photograph showing a person walking on the left and two cyclists on the right, all on a path. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is dark blue, and the lower-right portion is a lighter, natural color. The text 'Section 5 – Local journeys and modes'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

Section 5 – Local journeys and modes

Key findings – local journeys and modes

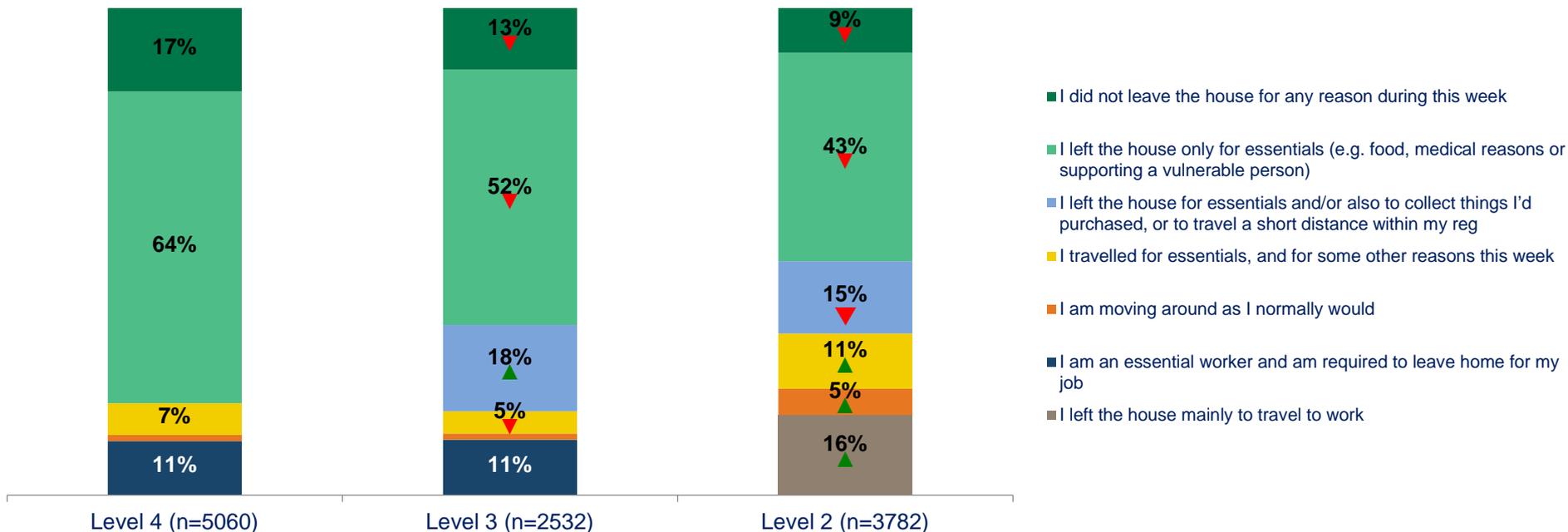
Waka Kotahi objective – how is travel changing?

- 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.
- General activity is returning to normal, but a number of people are still self-isolating.
- While the overall incidence of essential journeys increased in level 2, it has stabilised by the third week under these conditions rather than continuing an upward trend to match pre-alert conditions.
- While reported car use continues to gradually return to normal and active mode use continues to decline, reported public transport has plateaued.
- At the start of level 2, consideration of many public transport modes exceeded the incidence of pre-alert usage. However, this has now trended back down for those modes to better reflect the proportion who would normally travel in that way, with the notable exception of buses where consideration has yet to match pre-alert usage.



It remains the case that there are still people who report self-isolating in level 2

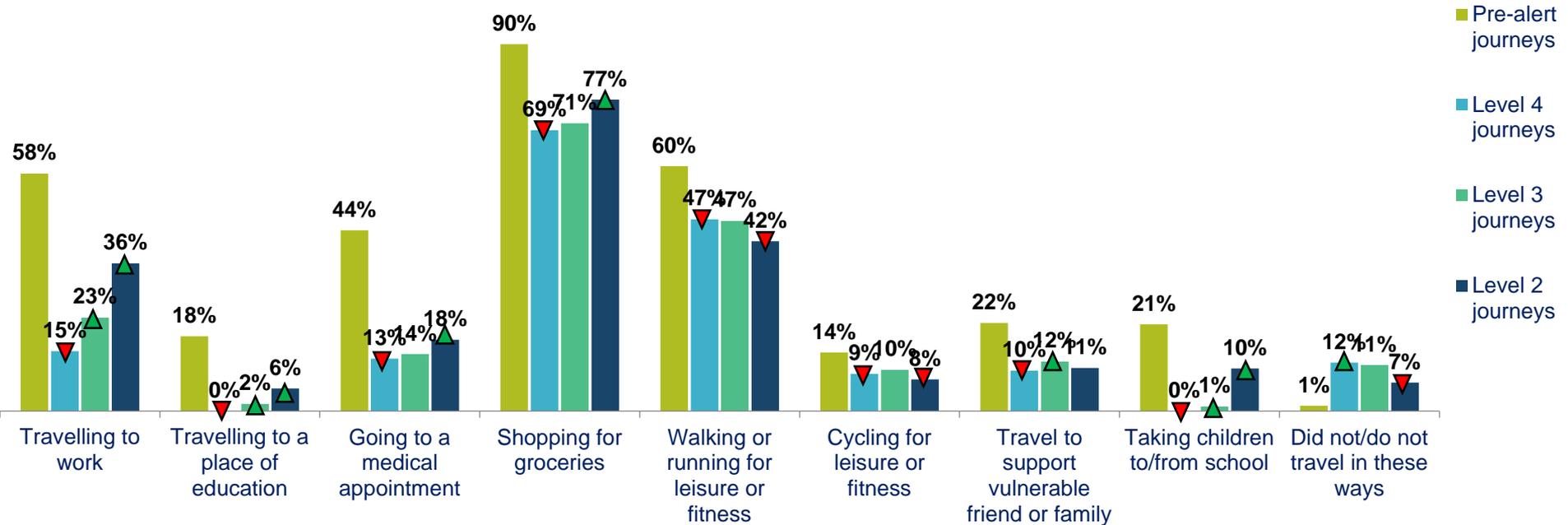
Reported activity and movement during the past seven days by alert level, excludes exercise



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

One in 10 now report taking children to school during level 2 conditions and only seven percent say that they have not made any of the essential journeys tested

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=); Level 4 (n=5,060); Level 3 (n=2,532); Level 2 (n=3,782)



After a significant increase in the first two weeks of level 2, the proportion travelling to work has now stabilised

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)



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

In a continuation of wave 8 trends, the proportion travelling to medical appointments remains higher than during lockdown

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)



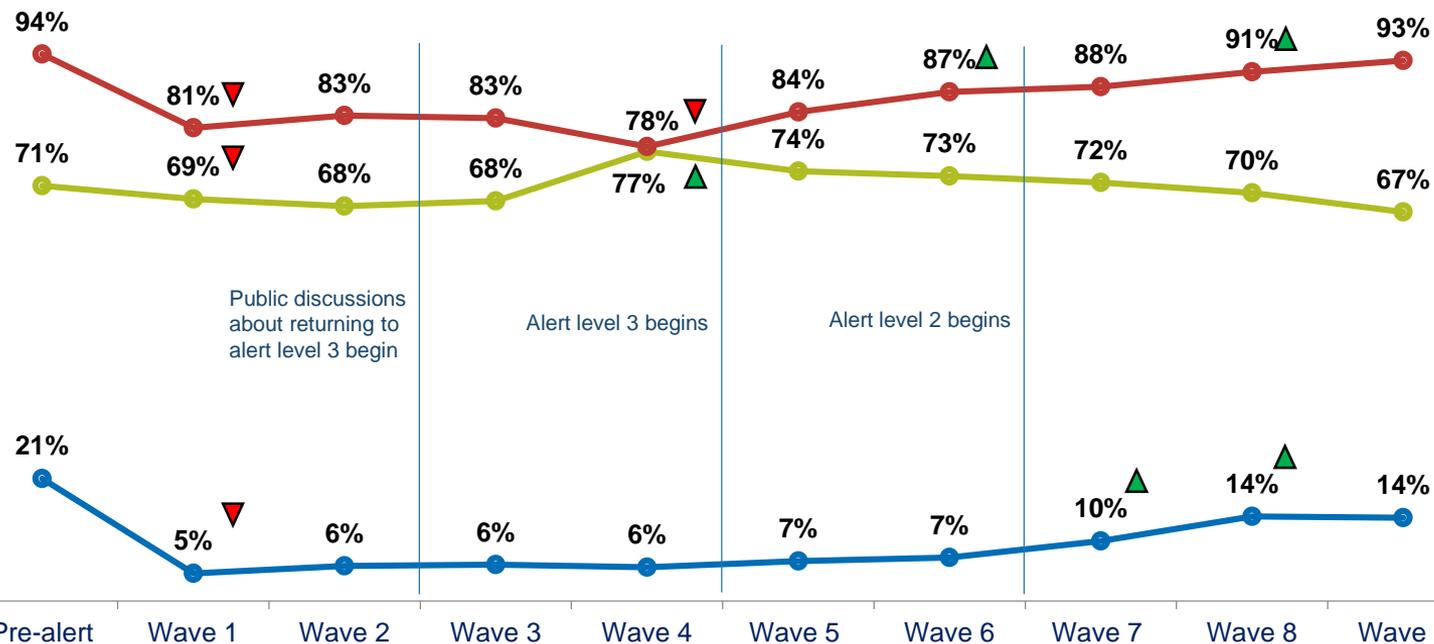
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Public transport usage has remained at the same level seen in wave 8, while private vehicle usage continues to recover and active mode use steadily declines

Changes in mode usage by wave



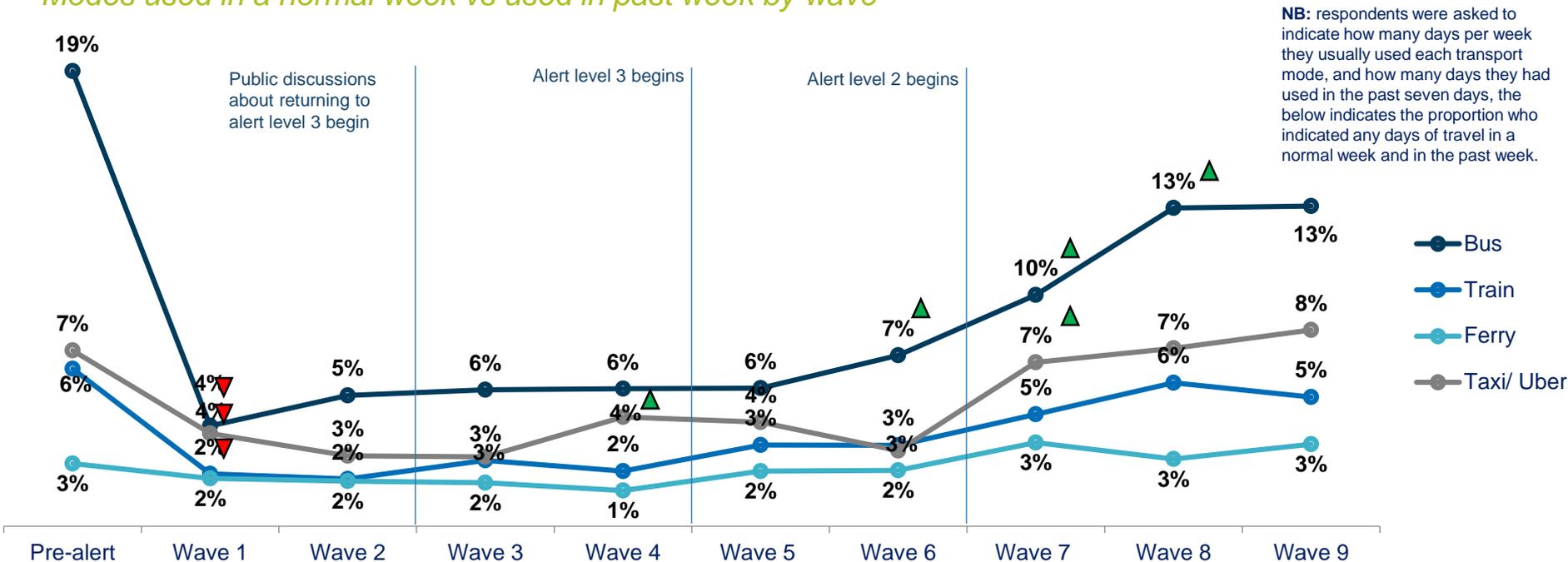
NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.

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

QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a *normal* week (e.g. in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255)

All public transport modes have remained at a similar level to the preceding wave, accessibility issues continue to be cited as a reason for not using public transport

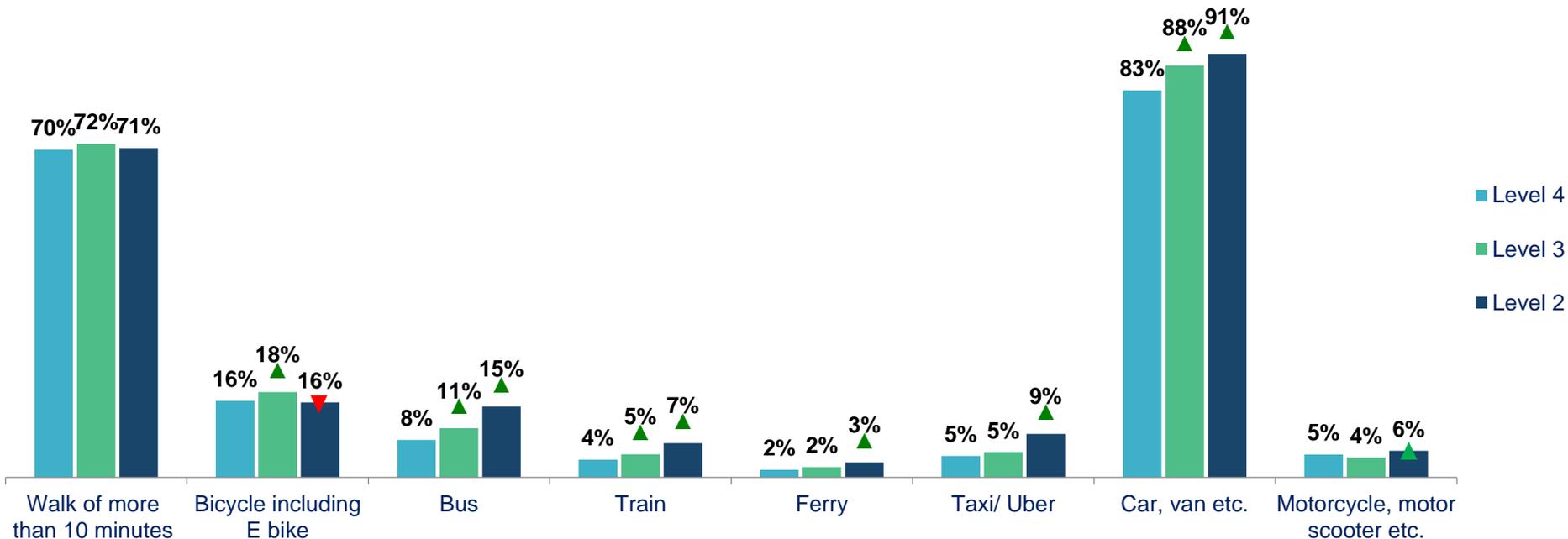
Modes used in a normal week vs used in past week by wave



QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a *normal* week (e.g. in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255)

As consideration of private vehicle and public transport has increased, active modes have begun to decrease in level 2

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;



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

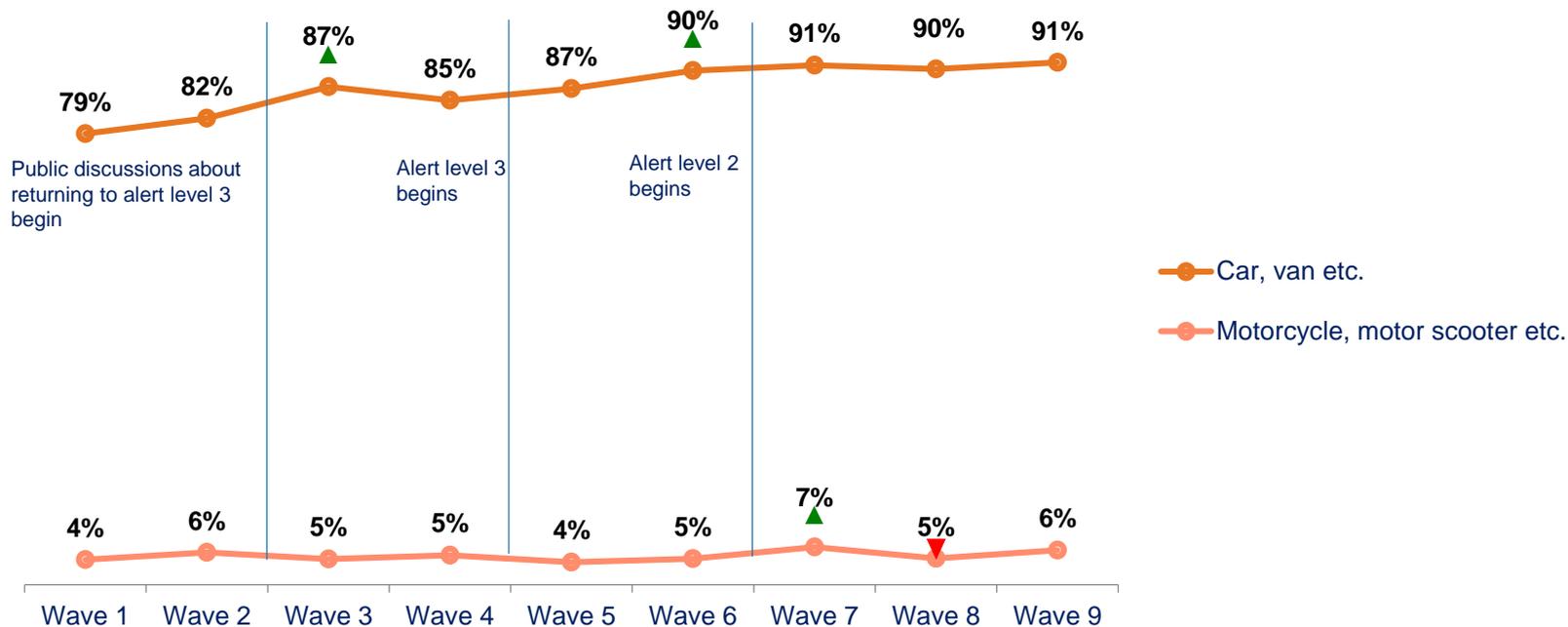
Car consideration has stabilised in level 2, just short of normal usage incidence

Mode consideration: coming week by wave

Pre-alert usage

Car ●
(93%)

Motorcycle ●
(5%)



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

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



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

For trains, ferries and taxis, consideration has decreased to match pre-alert usage levels, while bus consideration has yet to reach that threshold

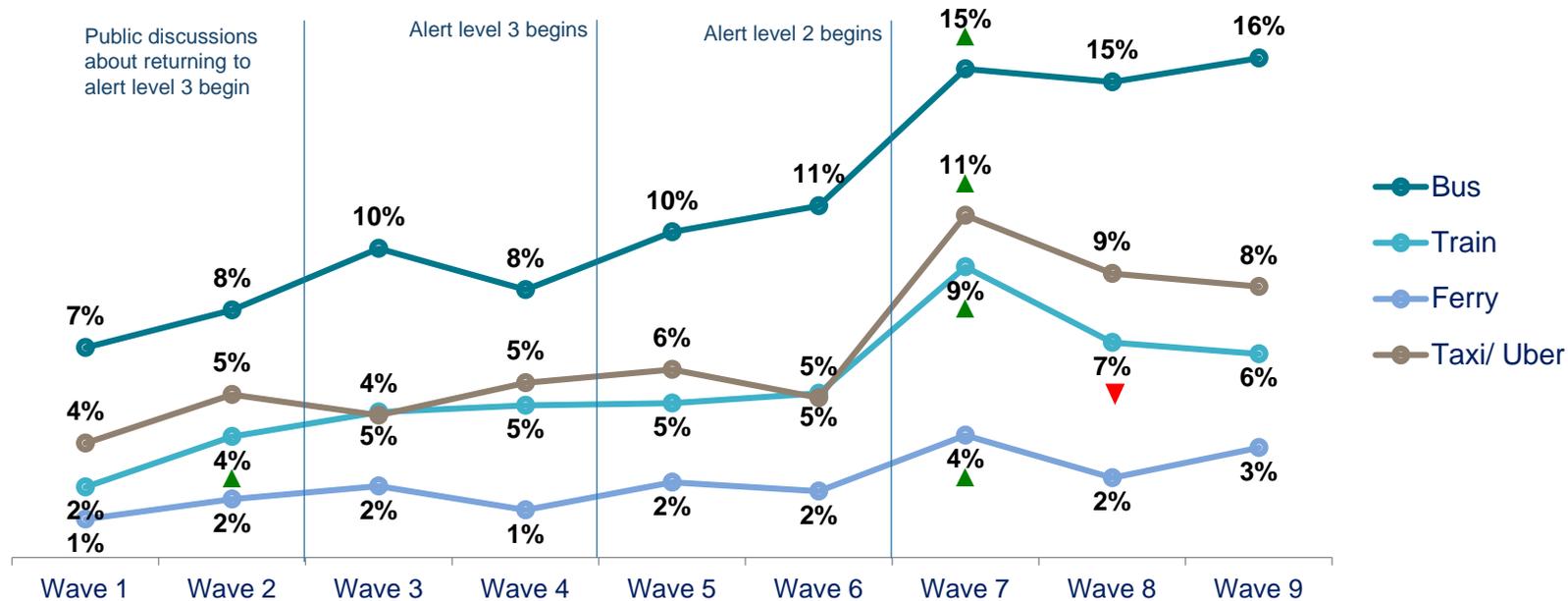
Mode consideration: coming week by wave

Pre-alert usage

Bus ● (19%)

Taxi/Uber ● (7%)

Train ● (6%)
Ferry ● (3%)



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

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



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period



Section 6 – Non-essential & domestic journeys

Key findings – non-essential & domestic journeys

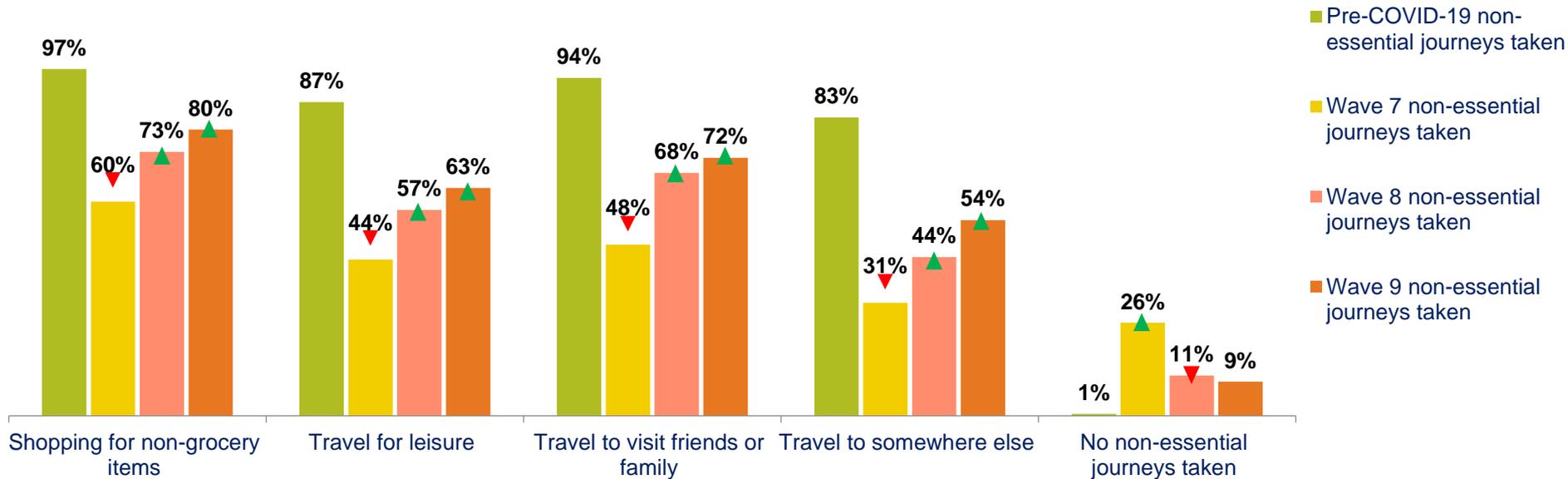
Waka Kotahi objective – how is non-essential & domestic travel changing?

- 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 2.
- The reported incidence of all types of non-essential journeys has been recovering, but is yet to match pre-alert levels, with four in five now shopping for non-grocery items in the last week.
- Private vehicles continue to recover more quickly than other modes for these types of journeys.
- The proportion taking longer, inter-regional journeys during the past seven days increased to nearly half of the population, with most of those visiting friends and family in other regions.



The incidence of all non-essential journeys continues to increase, but is still yet to achieve pre-lockdown levels

Non-essential journeys

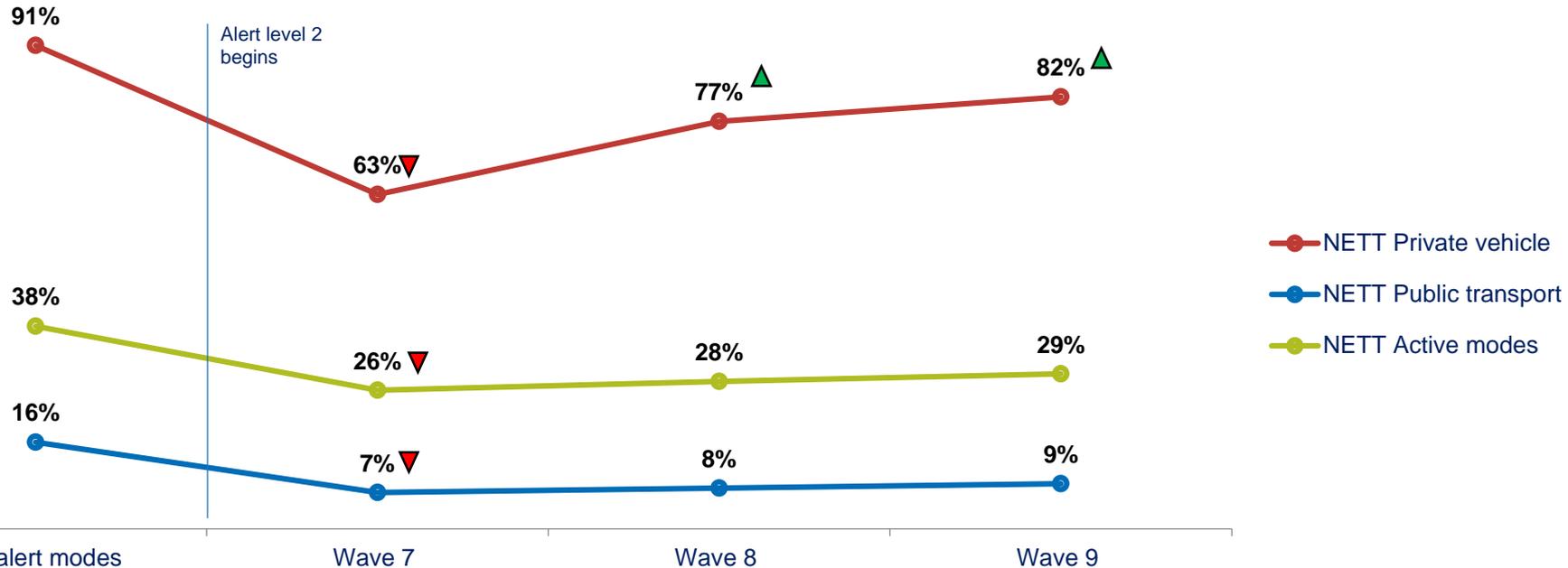


QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
 Base: all adults 15+ interviewed during level 2 in New Zealand (n=3,782)



The use of private vehicles for non-essential journeys is recovering more quickly than public transport or active modes

Mode Usage: 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.

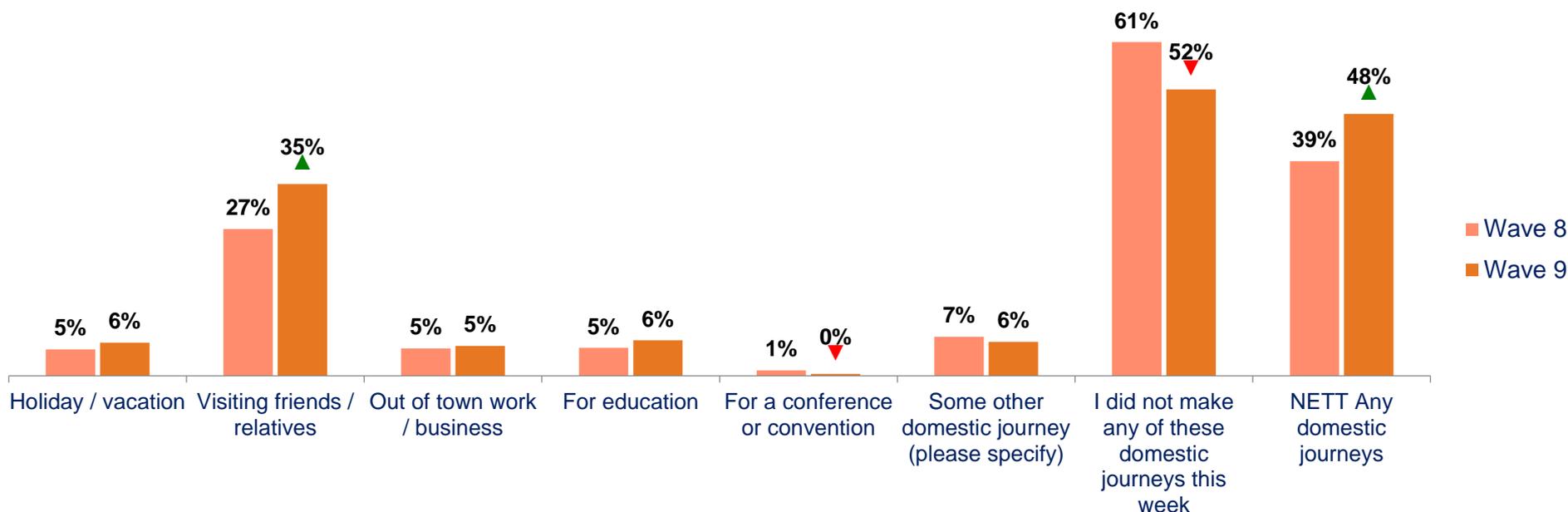
How, if at all did you make each of the journeys listed below in the past seven days?

Base: all adults 15+ interviewed during level 2 in New Zealand, pre-alert modes (n=3,782); wave 7 (n=1,263); wave 8 (n=1,264); wave 9 (n=1,255)



Nearly half reported taking a longer-distance domestic journey in wave 9, with visits to friends and relatives the most common journey type undertaken

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)





Section 7 – Future domestic tourism

Key findings – future domestic tourism

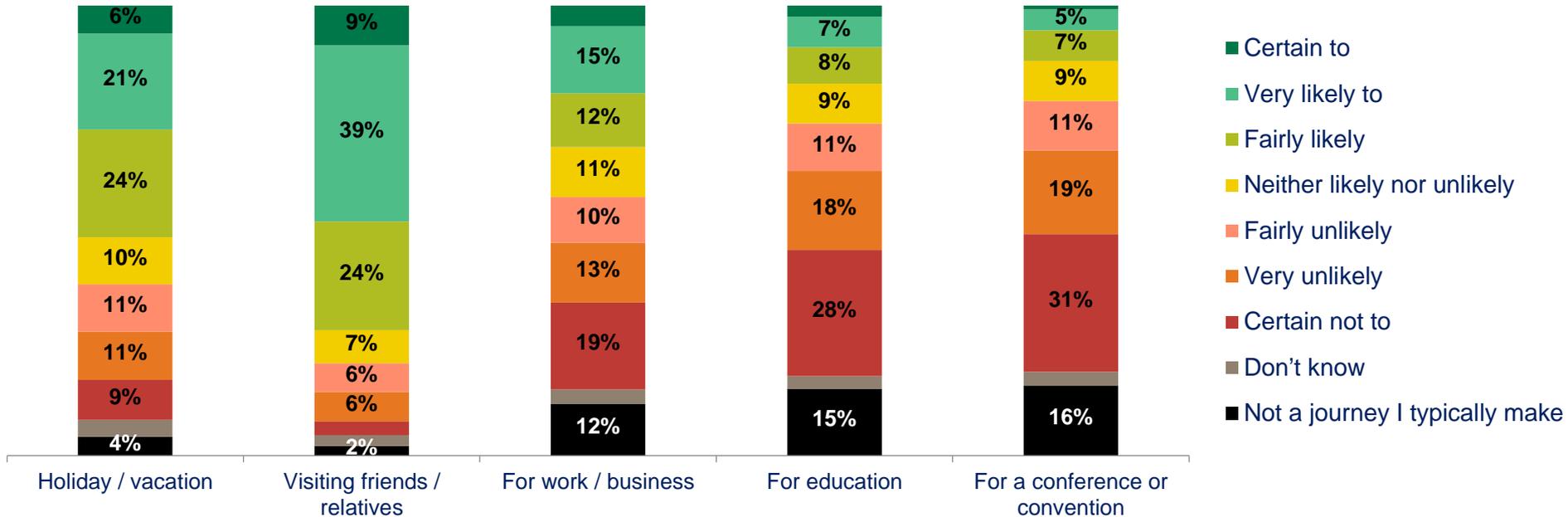
Waka Kotahi objective – how will domestic tourism change going forward?

- In light of restricted international travel, it is important to understand how domestic travel and tourism may change and impact New Zealand's travel infrastructure.
- Visiting friends and family is the big driver for inter-regional travel in the medium-term future, with 72% saying they are likely to travel for this reason and about half citing it as a reason for increasing their travel overall.
- While people are confident that they will travel domestically in the next six months, this doesn't translate into an anticipated increase in the volume of travel, more a reversion to the levels of travel they had before.
- In fact, taking into account those who feel they will travel less, the overall impact for most travel types is a net decrease during the coming half year.
- The main reasons for not travelling more are COVID-19 concerns and affordability, followed by an absence of need or desire to do so.
- There's been a directional increase in the perception that places will be less crowded than usual as a driver of increased travel.



In level 2, visiting friends and family is the domestic journey that people are most likely to make in the next six months

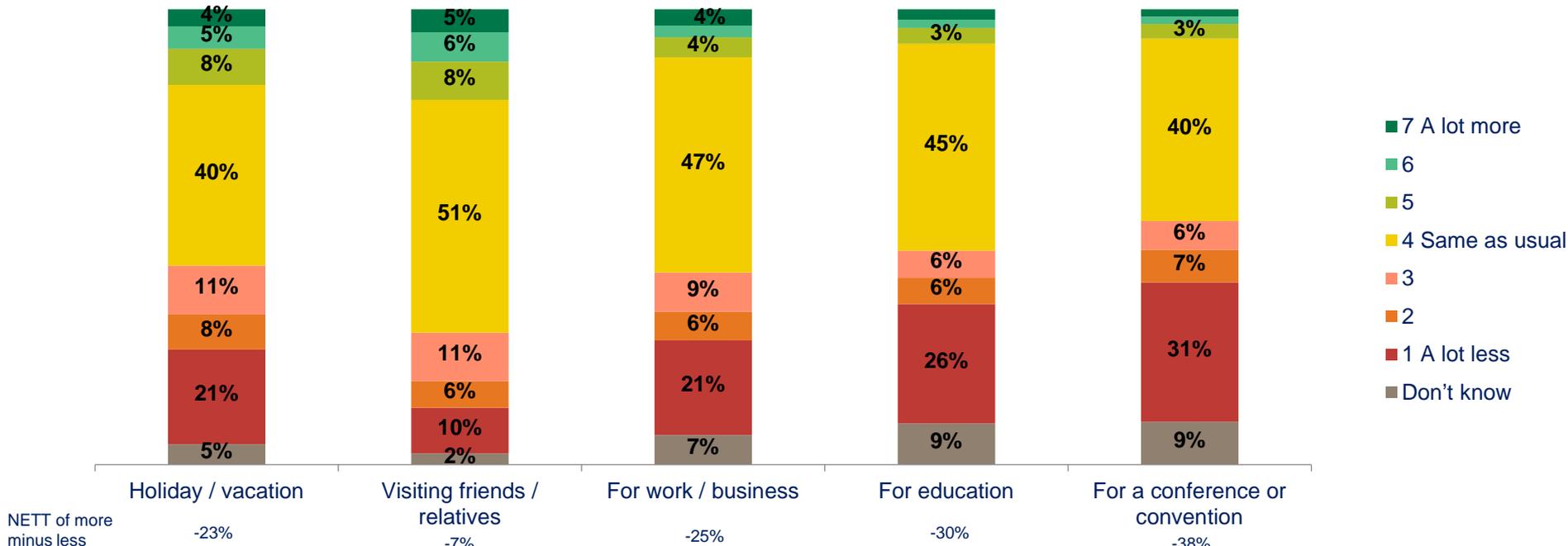
Likelihood to make domestic journeys



FDT1. How likely are you to make following types of domestic journeys in the next six months?
 Base: all adults 15+ in New Zealand, Base: (n=2,519)

While a large proportion say they're likely to travel in this way, the expected volume of travel overall will be less than in a normal winter and spring period

Intention to travel domestically

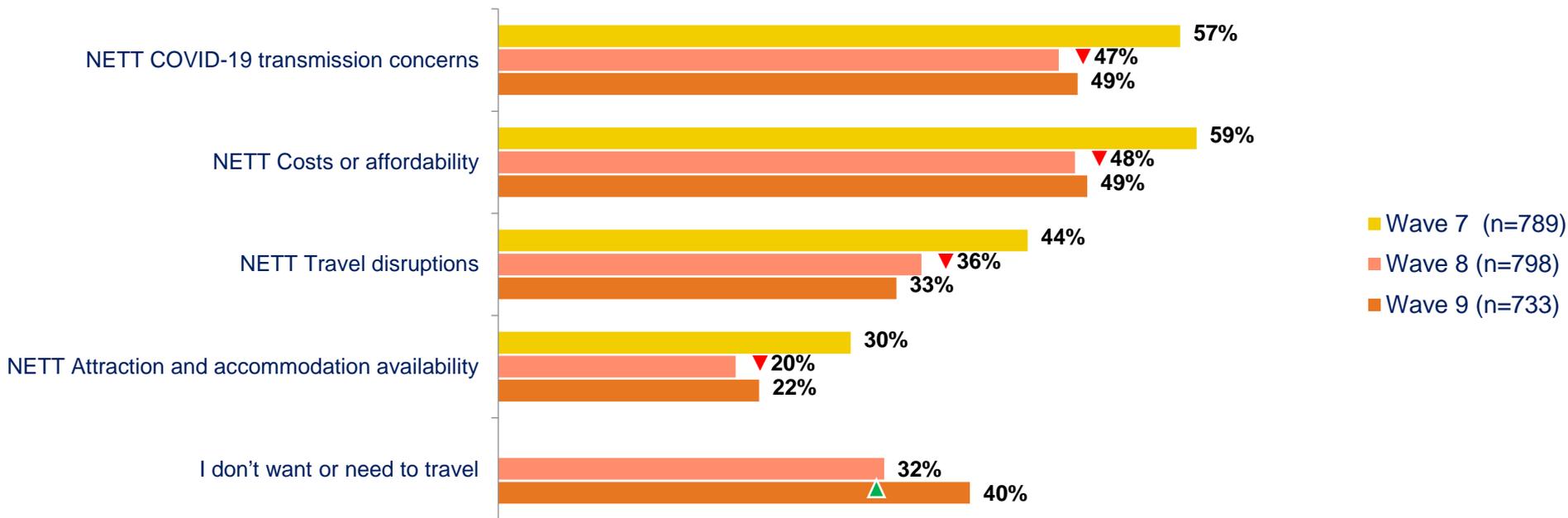


FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand

Two in five say that the reason they'll travel less is that they don't want or need to do so, up from just under a third in wave 8

Reasons for travelling less



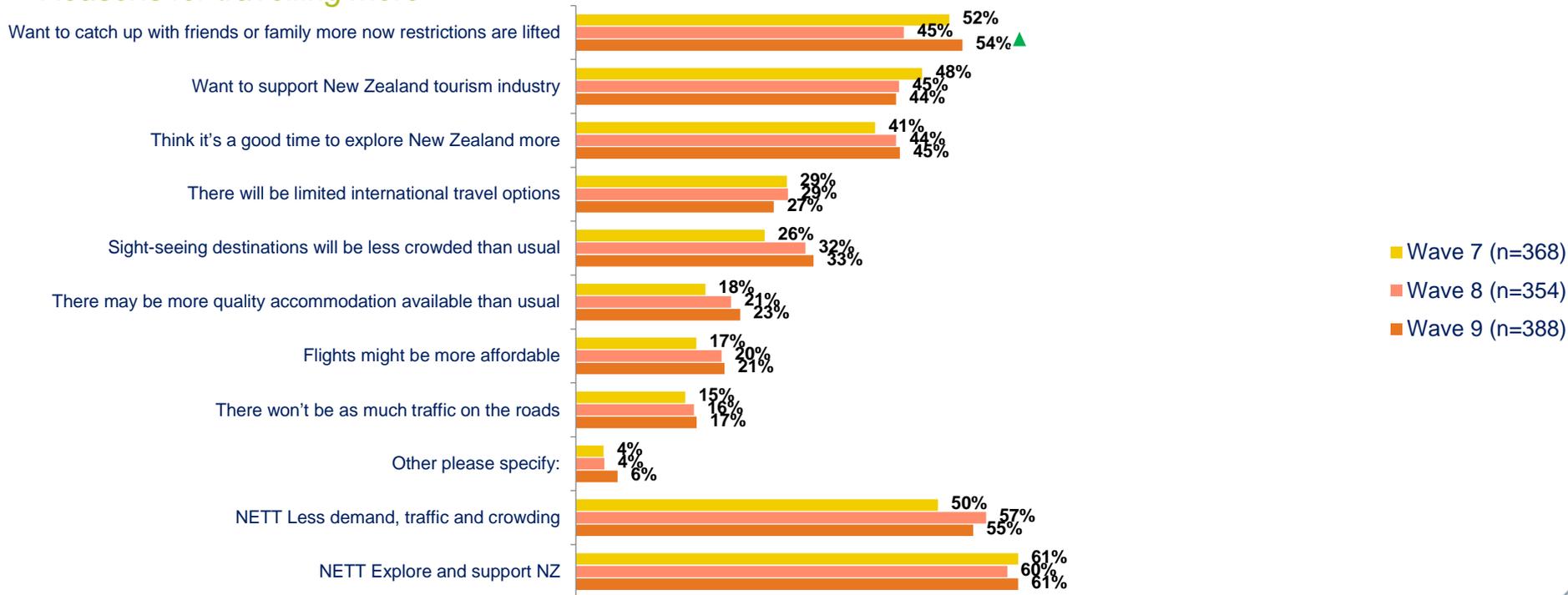
FDT3a. What are the main reasons that you intend to travel less?

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



Since measurement began, there has been a directional increase in those citing decreased traffic and demand as a reason for travelling more

Reasons for travelling more



FDT3b. What are the main reasons that you intend to travel more?

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





Section 8 – Returning to school

Key findings – returning to school

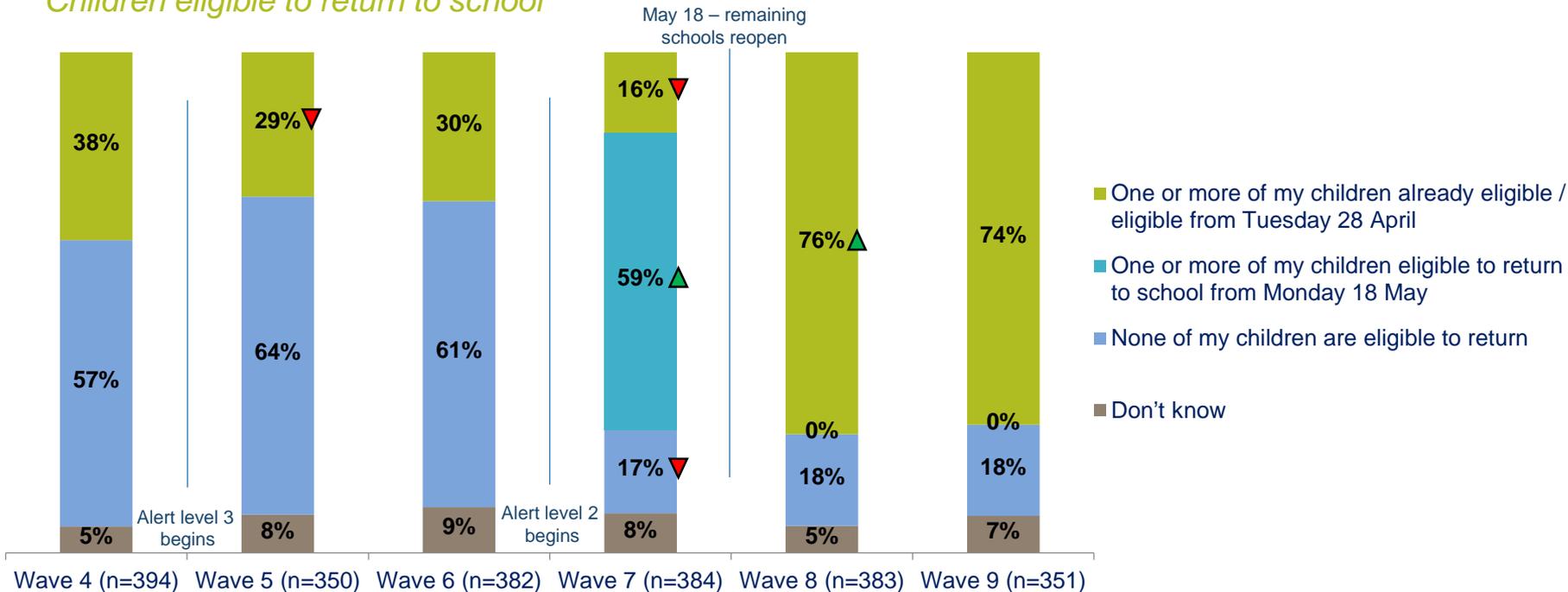
Waka Kotahi objective – how is travel changing?

- On 18 May, following the switch to alert level 2, all children were permitted to return to school or pre-school across New Zealand. It is important to understand how the intention to return is likely to impact daily traffic on our roads and rails.
- After two weeks under these conditions, the proportion of parents returning their children to school has stabilised across all measurements.
- Three quarters say their children are eligible to return, and of these 91% say their children have already, or are about to return to school.
- Overall, only 3% say that their children will not be returning to school, even though they are eligible. With this in mind, it's likely that school-run traffic will be closer to normal levels.



There has been no change between wave 8 and 9 in the proportion who think their children are eligible to be back at school

Children eligible to return to school



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

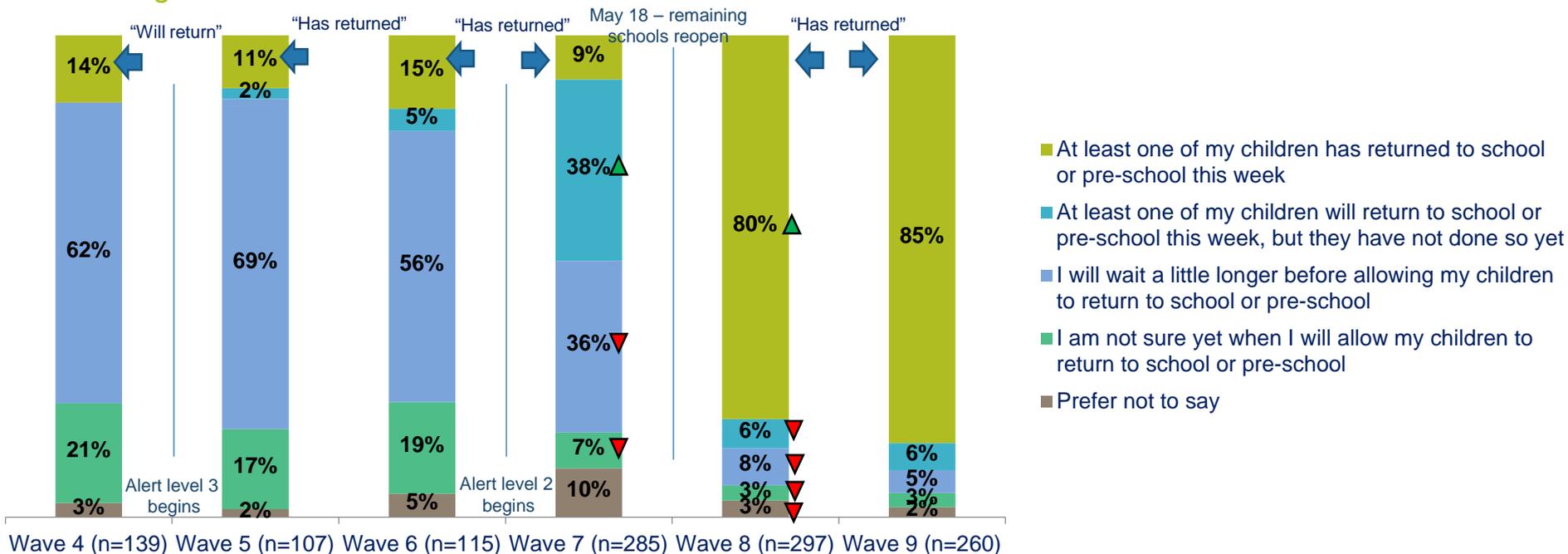
QHH1A. You said that you have children living at home with you. Which, if any of the following applies to you? QHH1B. And which, if any, of the following applies to you?

Base: those with children living at home



Of those with children eligible to return to school, more than nine in 10 say their children have returned or are about to do so

Intending / have returned children to school

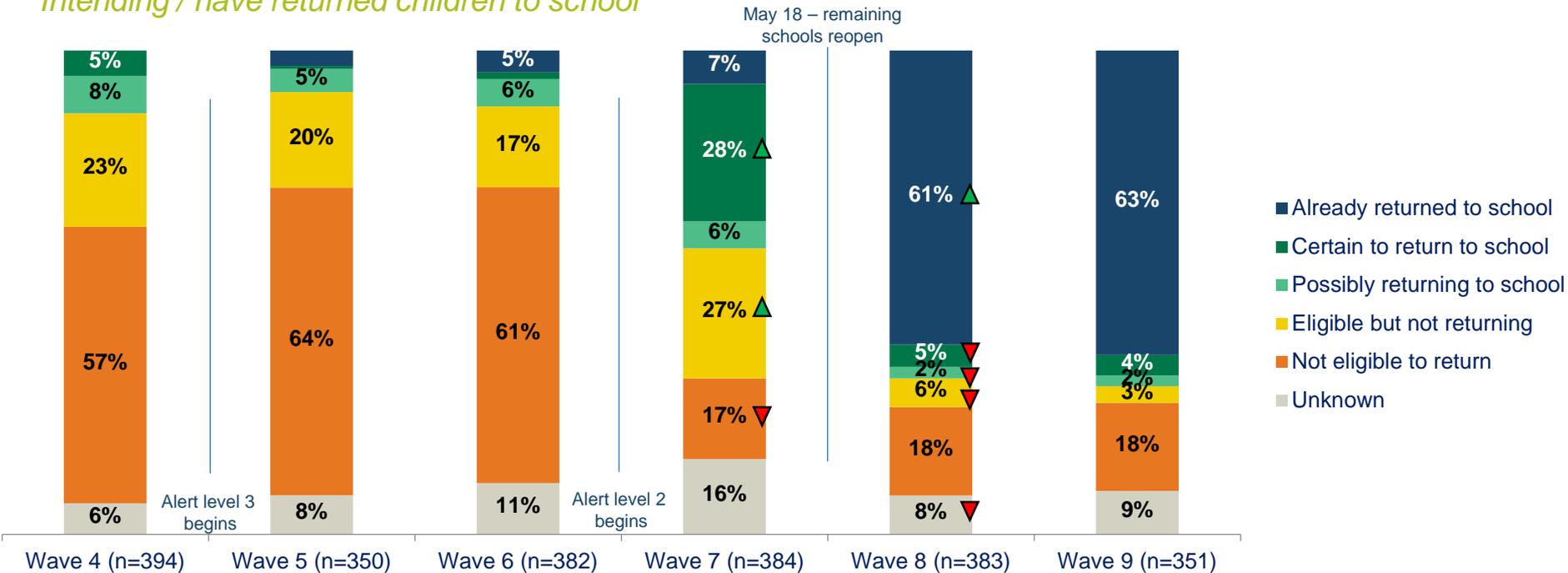


NB: official eligibility during level 3 is for children of essential workers.

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

At this point, only three percent of parents say their children are eligible, but still not returning to school

Intending / have returned children to school

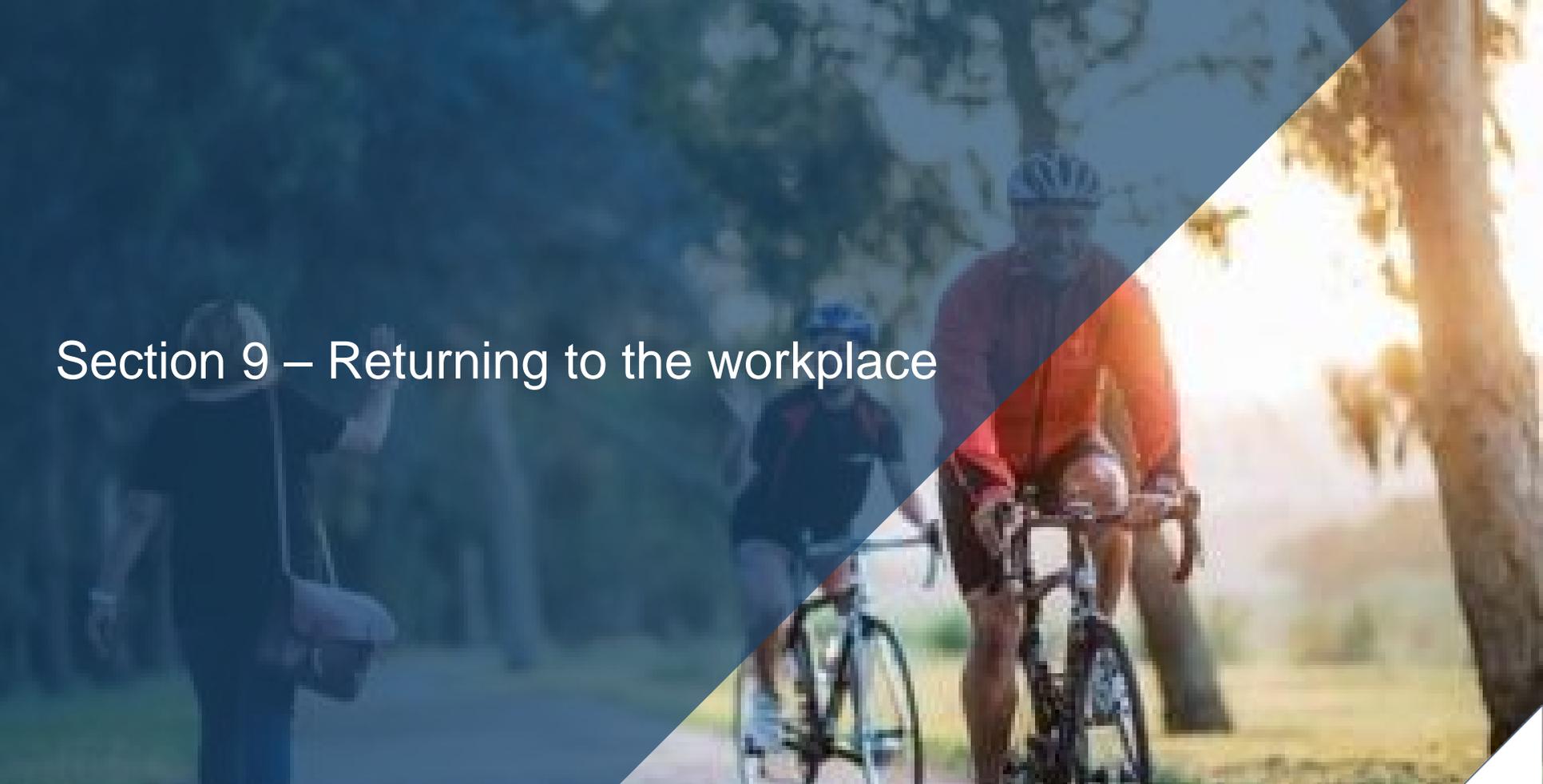


NB: official eligibility during level 3 is for children of essential workers.

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





Section 9 – Returning to the workplace

Key findings – returning to the workplace

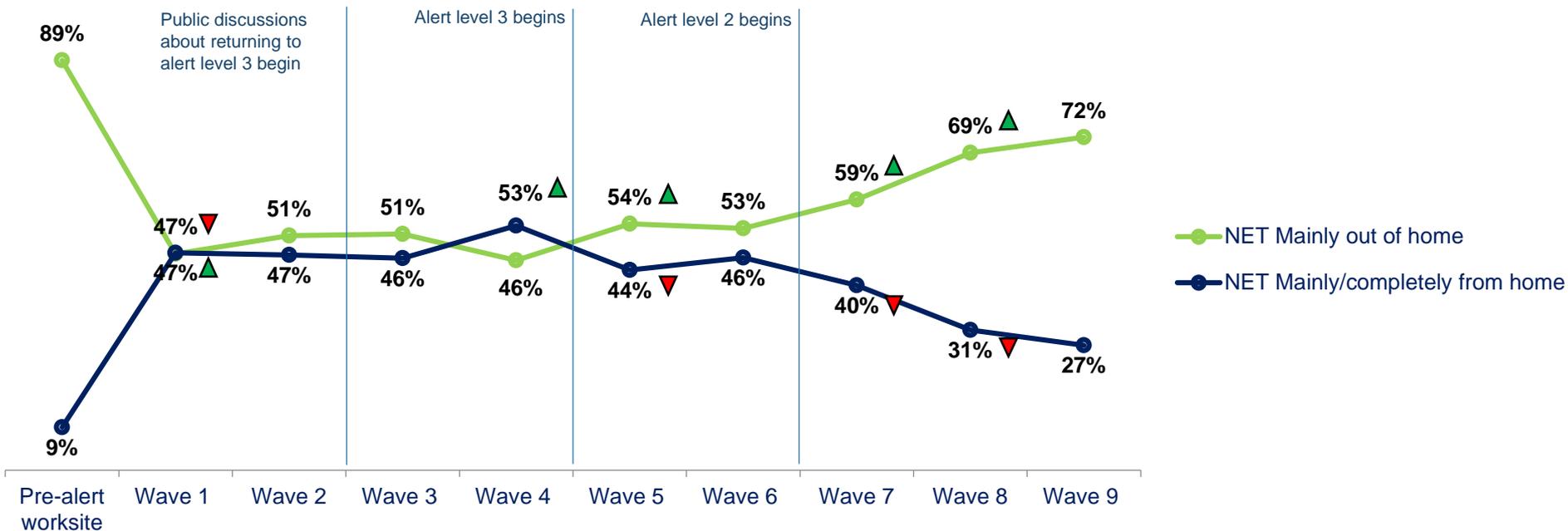
Waka Kotahi objective – how is travel changing?

- Commuter traffic makes up a large proportion of the impact on transport infrastructure. As alert levels decrease and restrictions are relaxed, it's important to understand who will return to work travel and how, and who will continue to be absent from the commuter population.
- The proportion commuting is trending back towards pre-alert levels but there is a net decrease in commuting days amongst those that are doing so.
- Although it's too early to say for certain, there are indications that there is a greater decrease in commuting days among those who would normally use public transport to commute.
- As the proportion returning to the workplace increases, those still working from home are more confident in their abilities, more motivated to do so and more likely to push for a continuation of this working arrangement.



Since alert level 2 began, people have steadily returned to the workplace, with the proportion doing so now 17 points short of pre-alert levels

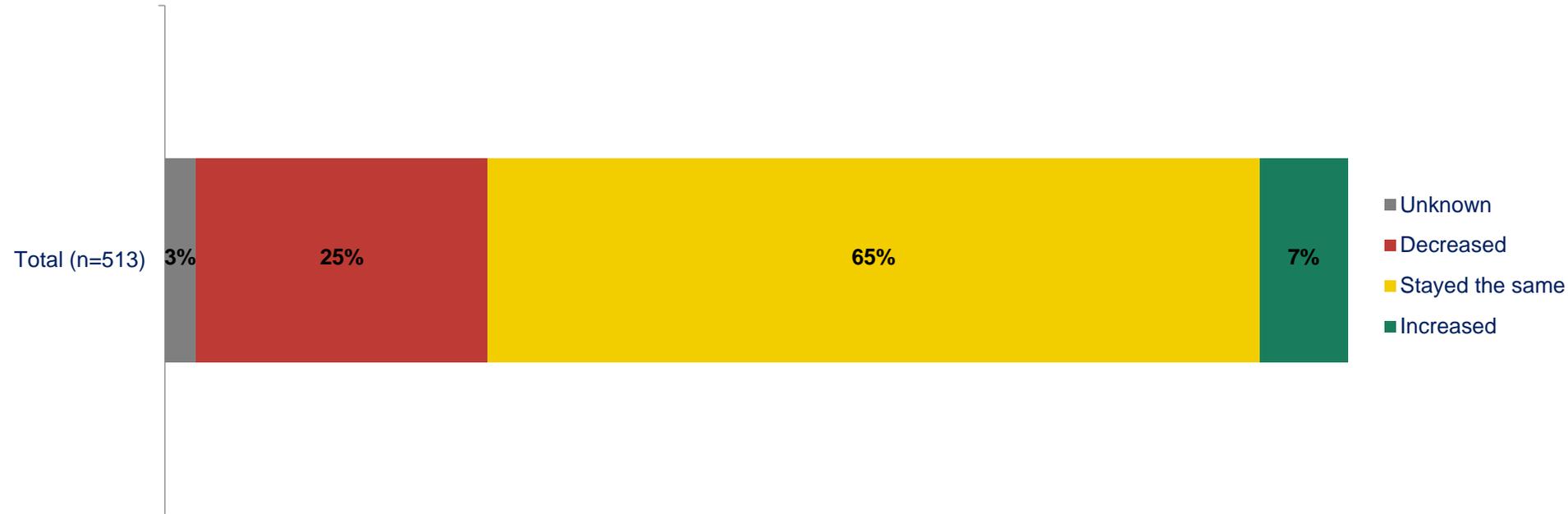
Proportion working in and out of home by survey wave



QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you currently work?
 Base: all adults 15+ in New Zealand usually working

Although a number of people are returning to work, the volume of reported work journeys is lower than pre-alert levels

Change in commuter days among those still travelling for work



QWORK1B/QWORK2B: In a typical week prior to any public health alert or lockdown, on how many days per week did you tend to travel to a place of work (e.g. office, store, client site)? / Thinking about the past week, on how many days out of the past seven did you travel to a place of work (e.g. office, store, client site)?

Base: all adults 15+ in New Zealand working away from home

When taken across the entire working population, the average number of commuter days has dropped by almost half a day

Number of commuter days – pre-lockdown vs past week who are still travelling to work



Pre-lockdown number of commuter days

Past week number of commuter days

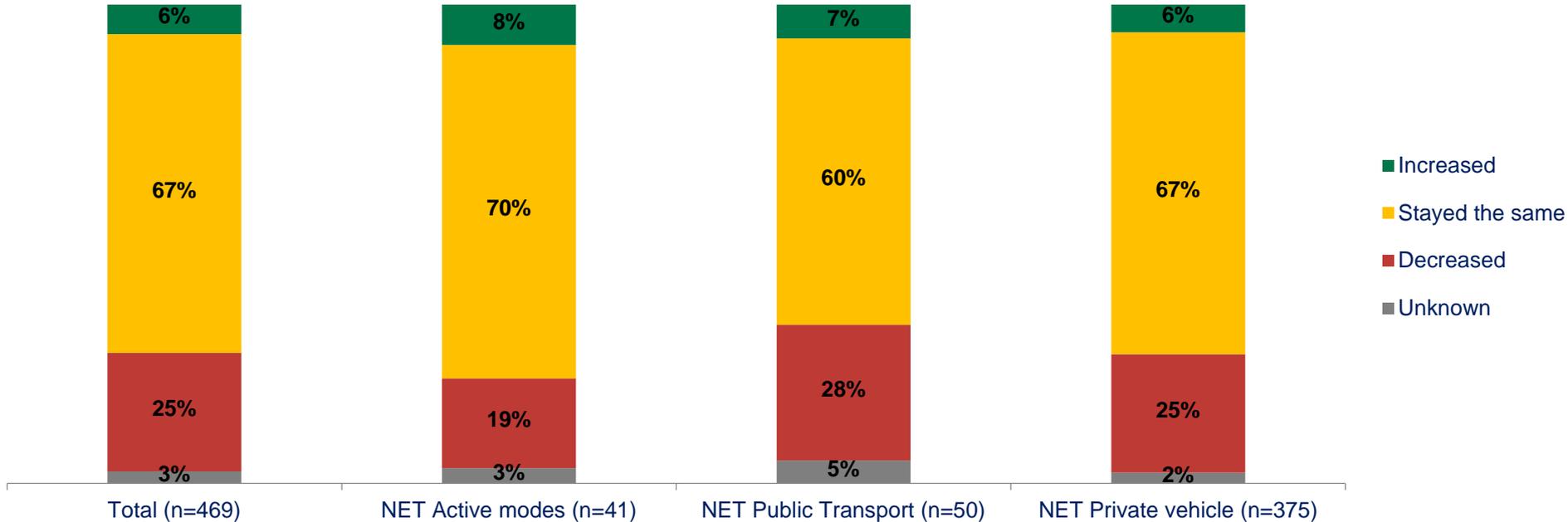
QWORK1B/QWORK2B: In a typical week prior to any public health alert or lockdown, on how many days per week did you tend to travel to a place of work (e.g. office, store, client site)? / Thinking about the past week, on how many days out of the past seven did you travel to a place of work (e.g. office, store, client site)?

Base: all adults 15+ in New Zealand working away from home (n=513)



While it's difficult to infer statistical significance at this stage, there is an apparent difference in the change in commuting days by mode

Change in commuter days by mode among those still travelling for work

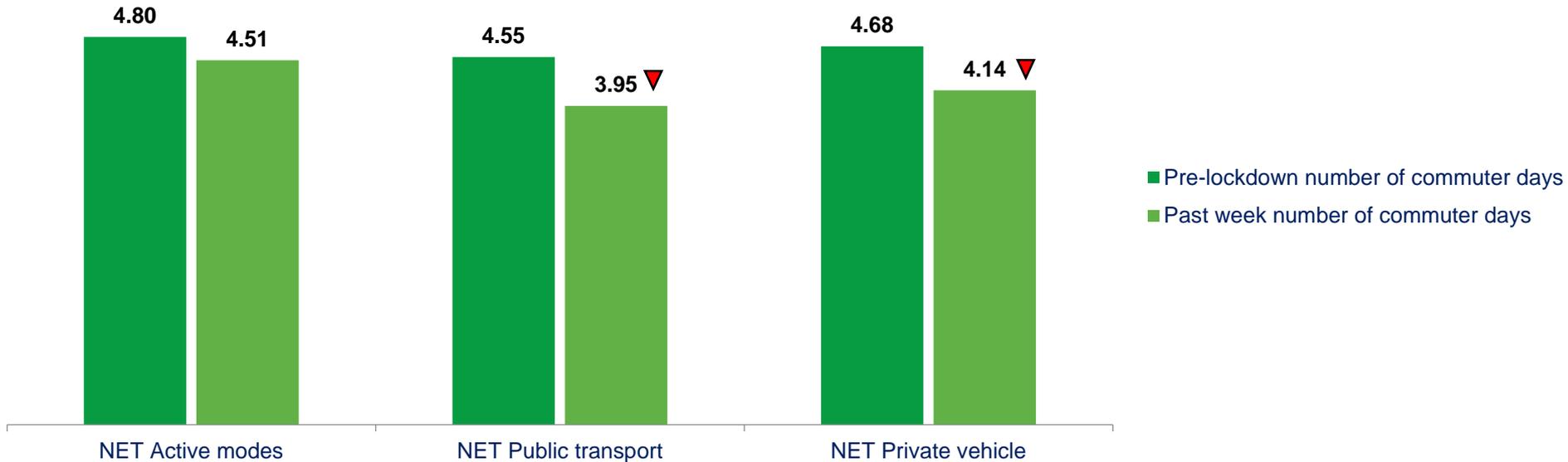


QWORK1B/QWORK2B: In a typical week prior to any public health alert or lockdown, on how many days per week did you tend to travel to a place of work (e.g. office, store, client site)? / Thinking about the past week, on how many days out of the past seven did you travel to a place of work (e.g. office, store, client site)?

Base: all adults 15+ in New Zealand working away from home who stated their normal commuting mode

More commuting days have been lost on public transport than any other mode, with public transport users now travelling less than four days a week on average

Number of commuter days – pre-lockdown vs past week by normal commute mode

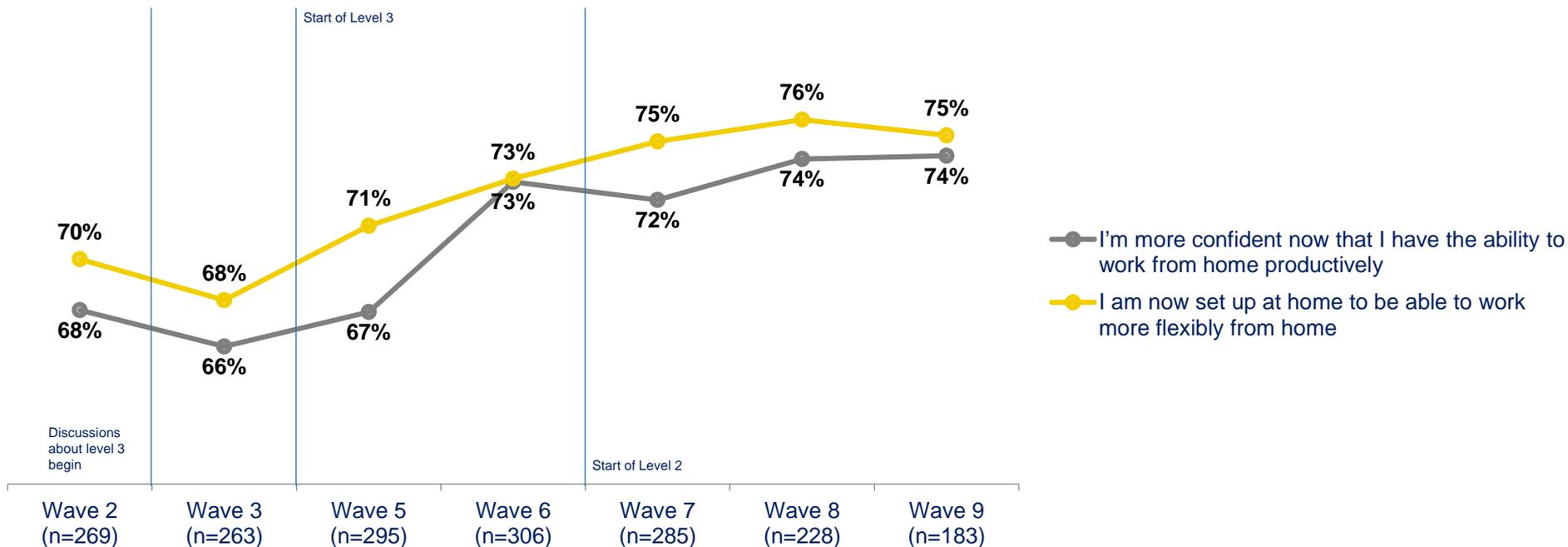


QWORK1B/QWORK2B: In a typical week prior to any public health alert or lockdown, on how many days per week did you tend to travel to a place of work (e.g. office, store, client site)? / Thinking about the past week, on how many days out of the past seven did you travel to a place of work (e.g. office, store, client site)?

Base: all adults 15+ in New Zealand working away from home who normally travel by active modes (n=41); Public transport (n=50); Private vehicle (n=375)

While many have returned to normal workplaces in level 2, those still working from home have a high level of stated capability

Capability factors (NETT all agree)

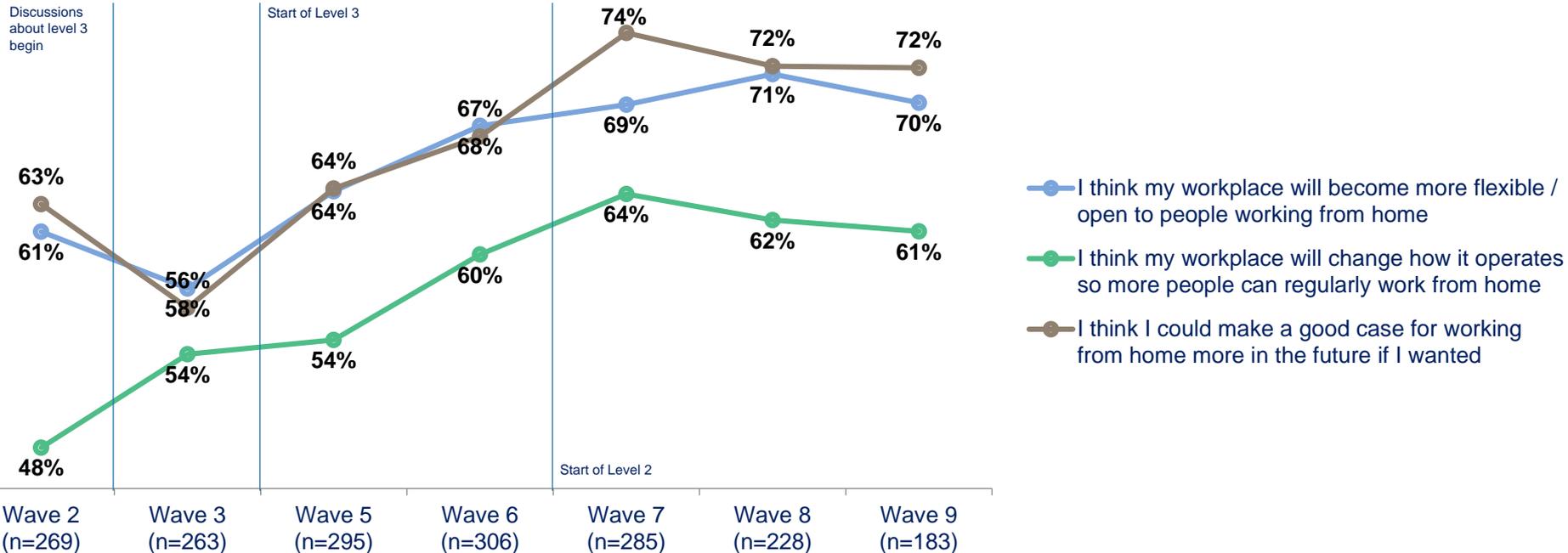


QWORK6A. Future attitudes to Working From Home -Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand currently working from home



The perception that workplaces were changing and workers could make a case peaked at the start of level 2, but has experienced a directional decline since

Opportunity factors (NETT all agree)



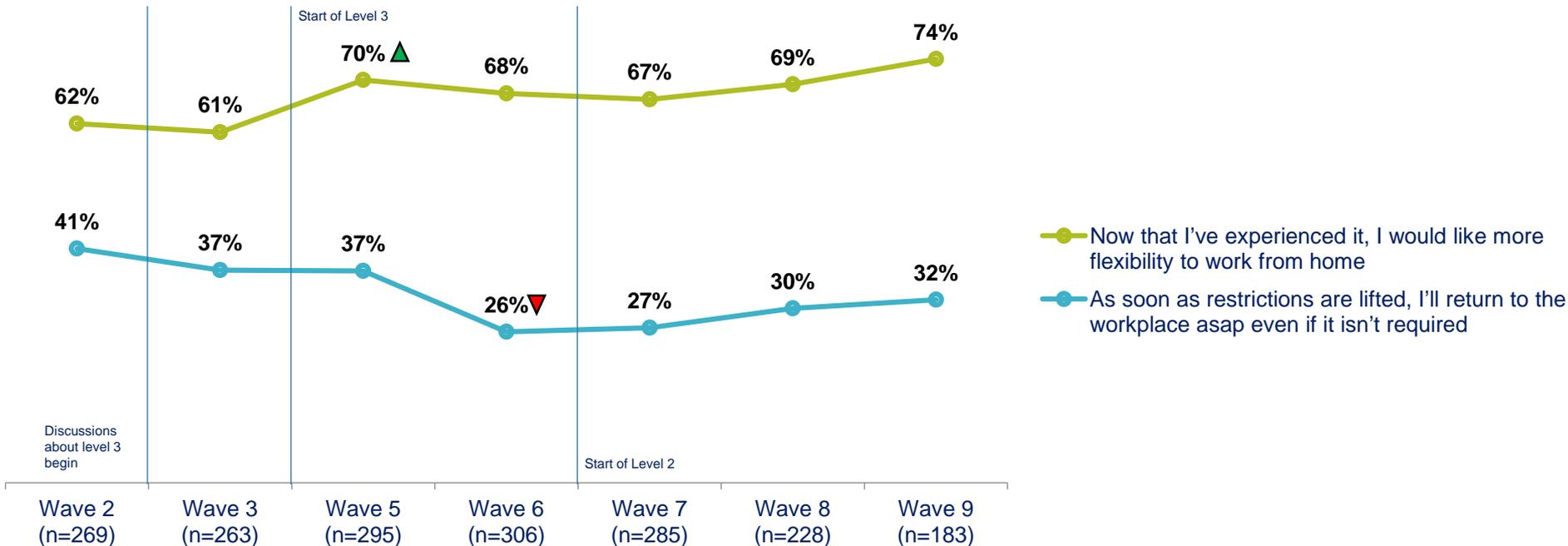
QWORK6A. Future attitudes to Working From Home -Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand currently working from home



The high level of motivation among those who are still working from home indicates that many of them are likely to continue to do so

Motivation factors (NETT all agree)



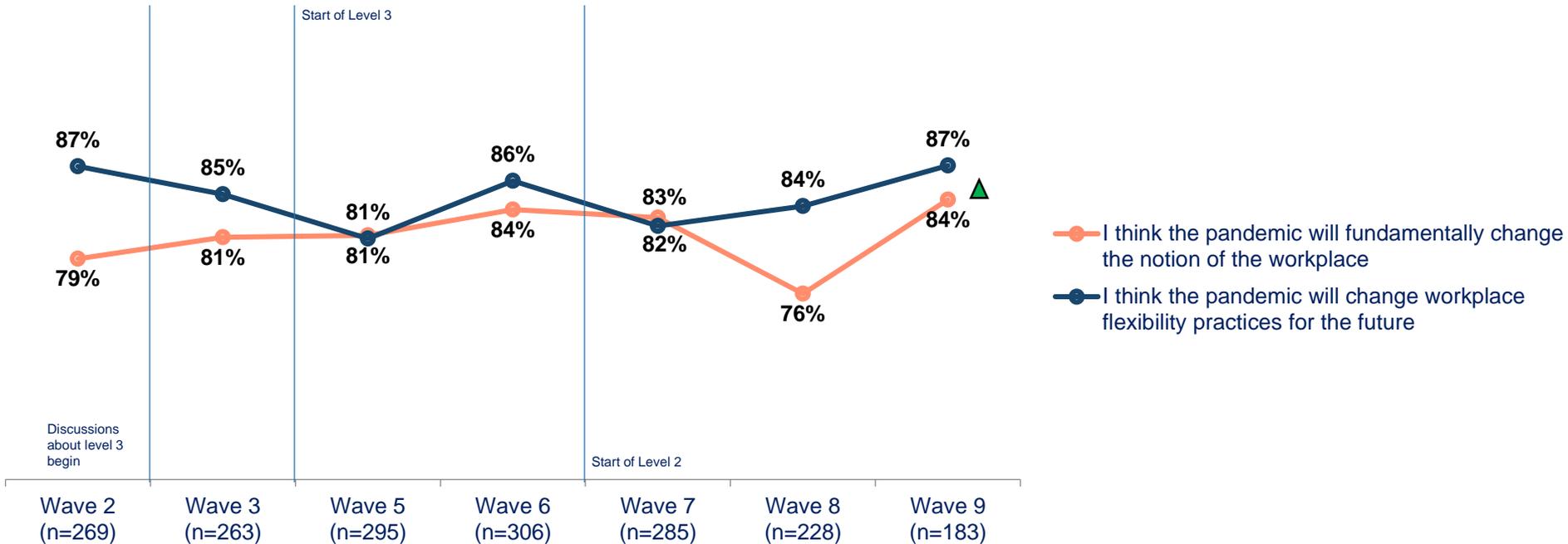
QWORK6A. Future attitudes to Working From Home -Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand currently working from home



At a macro level there is a high level of agreement that COVID-19 will have lasting impacts on the workplace, and this hasn't varied a great deal during lockdown

Context factors (NETT all agree)



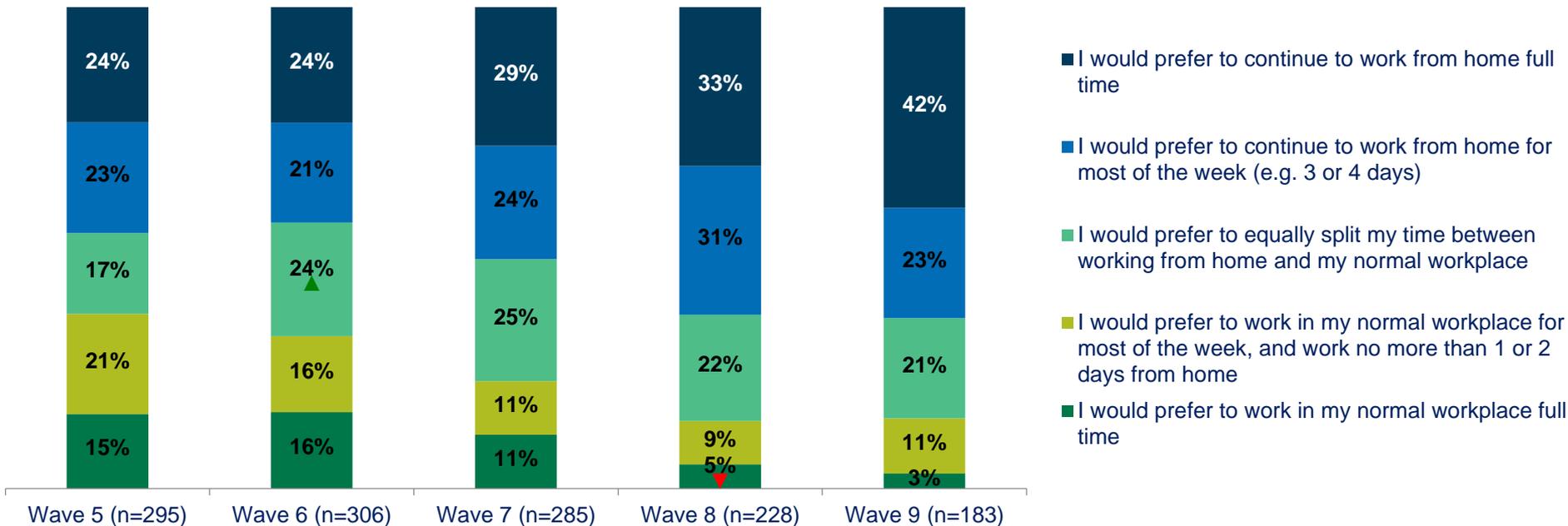
QWORK6A. Future attitudes to Working From Home -Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand currently working from home



As the proportion working from home has decreased, the proportion who are determined to do so has understandably strengthened

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



- I would prefer to continue to work from home full time
- I would prefer to continue to work from home for most of the week (e.g. 3 or 4 days)
- I would prefer to equally split my time between working from home and my normal workplace
- I would prefer to work in my normal workplace for most of the week, and work no more than 1 or 2 days from home
- I would prefer to work in my normal workplace full time

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



Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

