Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–10 weekly core report

9 June 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 have not yet been through a formal peer review process and the findings should be considered as draft

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

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

Report content

COVID-19 transport impact

- Section 1 – About this research
  - Overview & technical notes
- Section 2 – Waka Kotahi transport key findings summary
- Section 3 – Local journeys and modes
- Section 4 – Perception of transport modes
- Section 5 – Non-essential & domestic journeys
- Section 6 – Future domestic tourism
- Section 7 – Returning to the workplace

Section 1 – About this research

Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

Overview of research (i)

Research design and outputs

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

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

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

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

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

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

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

Example: Harmony dashboard page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys and domestic travel undertaken and changes

- change is measured since February 2020.

Modal shift patterns and perceptual shifts

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

Measuring attitudinal shifts towards COVID-19

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

Questions to classify into a variety of segments of interest

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

Ad hoc questions of interest

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

Report notes (i)

Key information to note for this report

- This report is based on ten 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 9 and 10, as well as individual waves where appropriate.
- The focus of this report is tracking trends and changes over time and how New Zealanders have adjusted their use of transport and travel behaviour. As this study was not conducted prior to level 4 restrictions, respondents were asked to recall their transport and travel behaviour prior to level 4 restrictions based on a *'normal week'* i.e. in February this year.

Wave	Dates of fieldwork	Alert level
1	Friday 3 April to Wednesday 8 April	Alert level 4
2	Thursday 9 April to Tuesday 14 April	
3	Thursday 16 April to Monday 20 April	
4	Thursday 23 April to Sunday 26 April	
5	Thursday 30 April to Sunday 3 May	Alert level 3
6	Thursday 7 May to Sunday 10 May	
7	Thursday 14 May to Sunday 17 May	Alert level 2
8	Thursday 21 May to Sunday 24 May	
9	Thursday 28 May to Monday 1 June	
10	Thursday 4 June to Sunday 7 June	

- At a total population level, significance testing indicated in this wave 10 report is based on a statistically significant shift of results between waves 1 to 10, 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.

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 - 10		Wave 10	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*
Total		n=5,060	1.38	n=2,532	1.95	n=5,043	1.38	n=1,261	2.76
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=1,324	2.69	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=100	9.8
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=189	7.13
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=99	9.85
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=1,328	2.69	n=342	5.3
	Disability, Vulnerability and COVID-19**								
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=153	7.92
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=303	5.63
Aged 70 + years	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over	n=618	3.94	n=315	5.52	n=627	3.91	n=146	8.11

*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.

**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

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

25 March

All public transport to be free during lockdown period

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

3 April

20 April

Waka Kotahi COVID-19 impact tracker fieldwork begins

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

4 May

First day where no new COVID-19 cases are recorded in NZ

11 May

PM Jacinda Arden announces that New Zealand will move to level 2 at 11:59pm, 13 May, with schools to open Monday 18 May and bars Thursday 21 May.

13 May

New Zealand moved to alert level 2 at 11:59

18 May & 21 May

All schools open to students on Monday and bars allowed to open Thursday

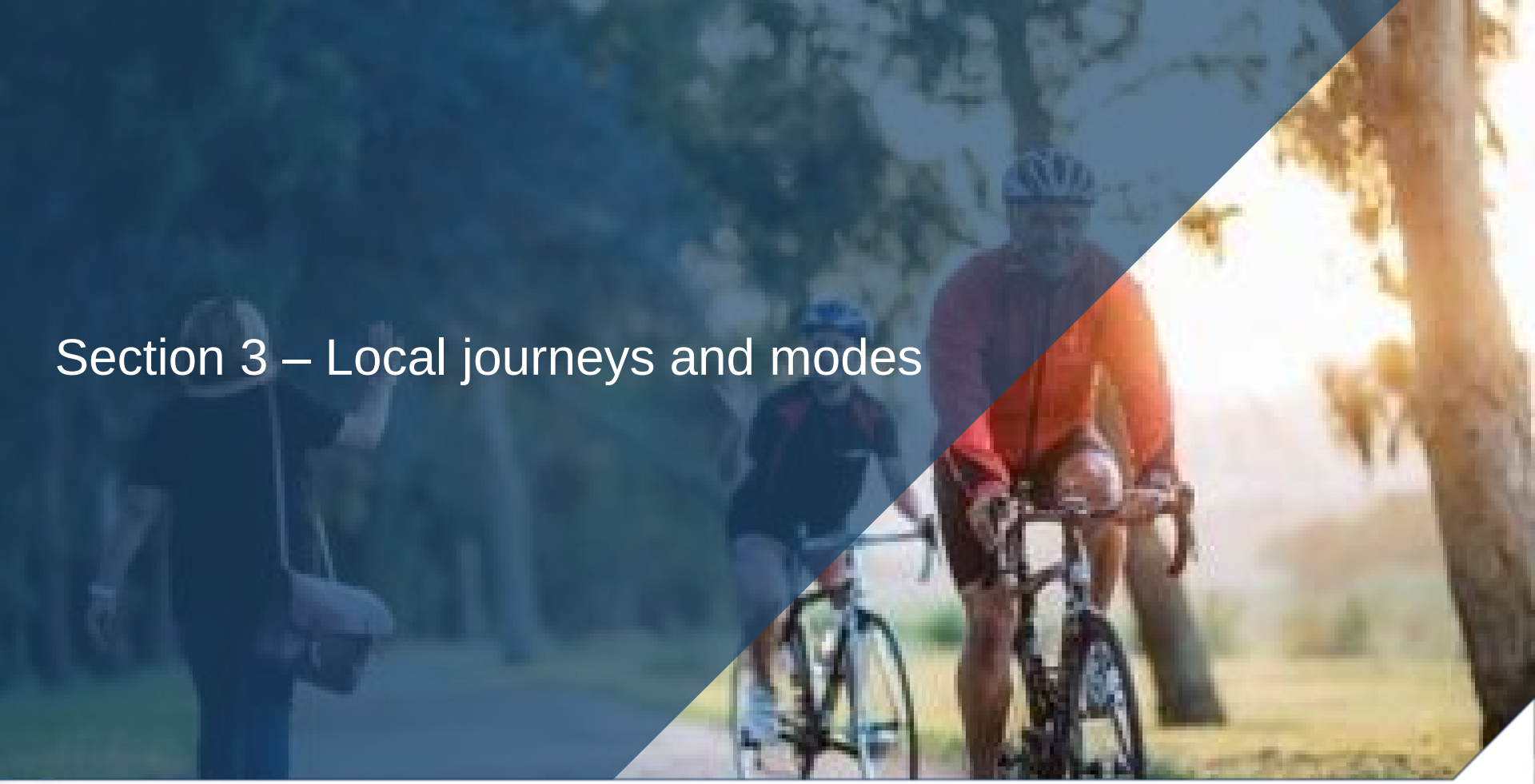
Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–10

Waka Kotahi COVID-19 transport impact tracker

- After over three weeks in level 2, New Zealanders are anticipating a change to level 1 conditions.
- Even under level 2 conditions, close to half are at least partially self isolating. Of these, the vast majority say that they would normally be out and about more and therefore indicates some caution within the population even as COVID-19 transmission risks reduce.
- 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 jumped significantly in the final week of level 2, with buses in particular considered by one in five as a transport mode, which is greater than normal levels of reported usage.
    - There has been no recovery in the rate of public transport usage for the non-essential journeys that people are able to make in level 2.
- While public transport usage is not recovering as strongly as private vehicles, perceptions of buses are improving across many attributes. However, trains are not experiencing the same positive movement with significant decreases in perceived reliability.
- More than half have made domestic journeys between regions, with almost one in 10 taking holiday during last week.
- When it comes to domestic tourism, there has been a significant increase in the proportion saying they will take a holiday in New Zealand in the next six months. However, it is still the case that most think their domestic travel will stay the same or decrease, meaning a net fall in travel for domestic tourism journeys in 2020.
- There has not been an increase this week in workers returning to their normal workplace and the number of travel days for those commuting is down on pre-alert level travel.

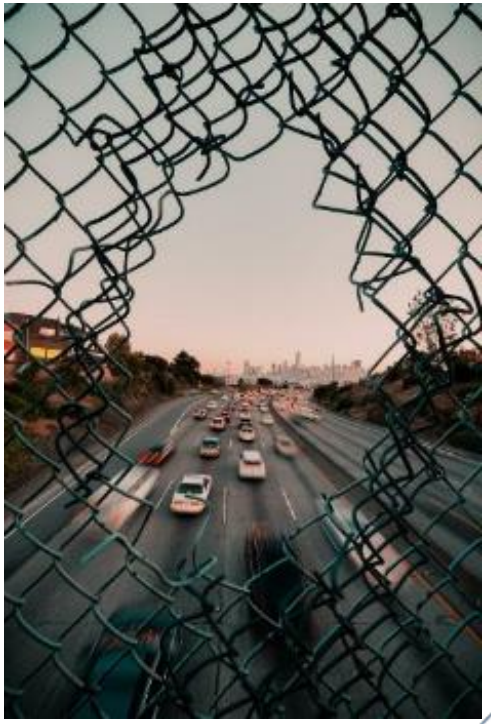
Section 3 – Local journeys and modes



Key findings – local journeys and modes

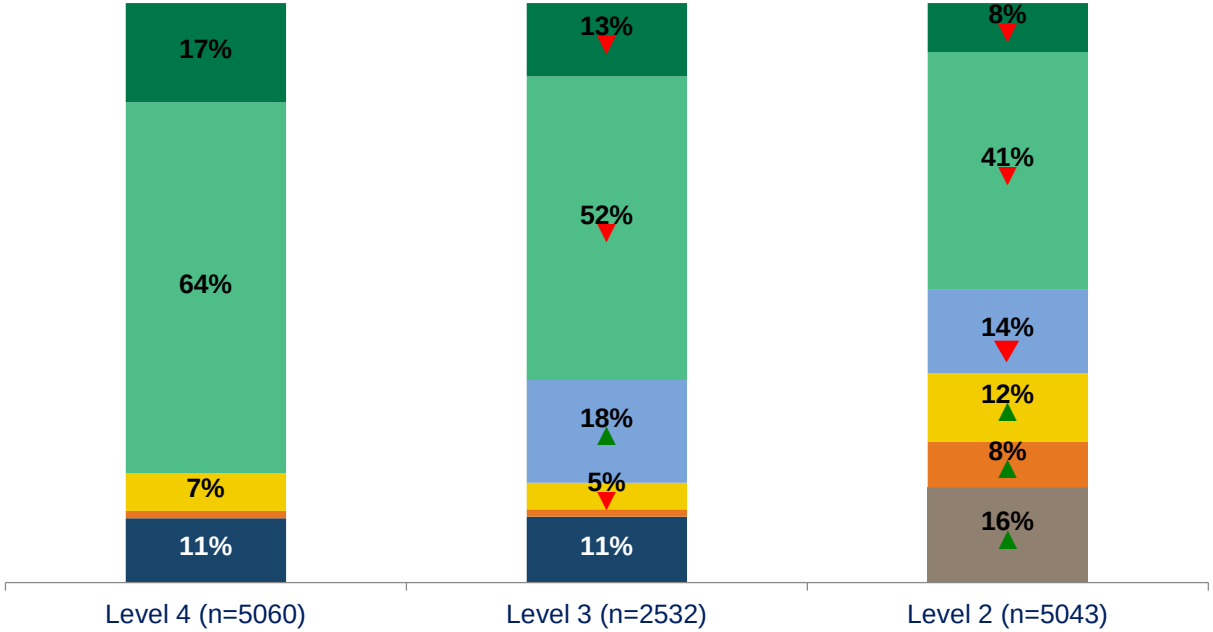
Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have been tracking both changes in journeys made and modes used.
- This section specifically focuses on travel for local, essential journeys during this time.
- General activity is returning to normal, but a number of people are still self-isolating. Of those self-isolating, the majority indicate that this is not normal behaviour and that they would normally leave the house more.
- There's been real growth in essential journey travel in level 2, but this has levelled off in the last couple of weeks.
- Public transport usage has also plateaued and has yet to return to normal levels, however consideration has grown as discussions around returning to level 1 have begun.
- Although modal shift was not present in the higher levels of lockdown, this is beginning to appear in work travel in level 2, with an increase in private vehicle travel at the expense of public transport.



Approximately half report that they are still self isolating at least in part. Of those travelling, the largest group say they are mainly doing so for work

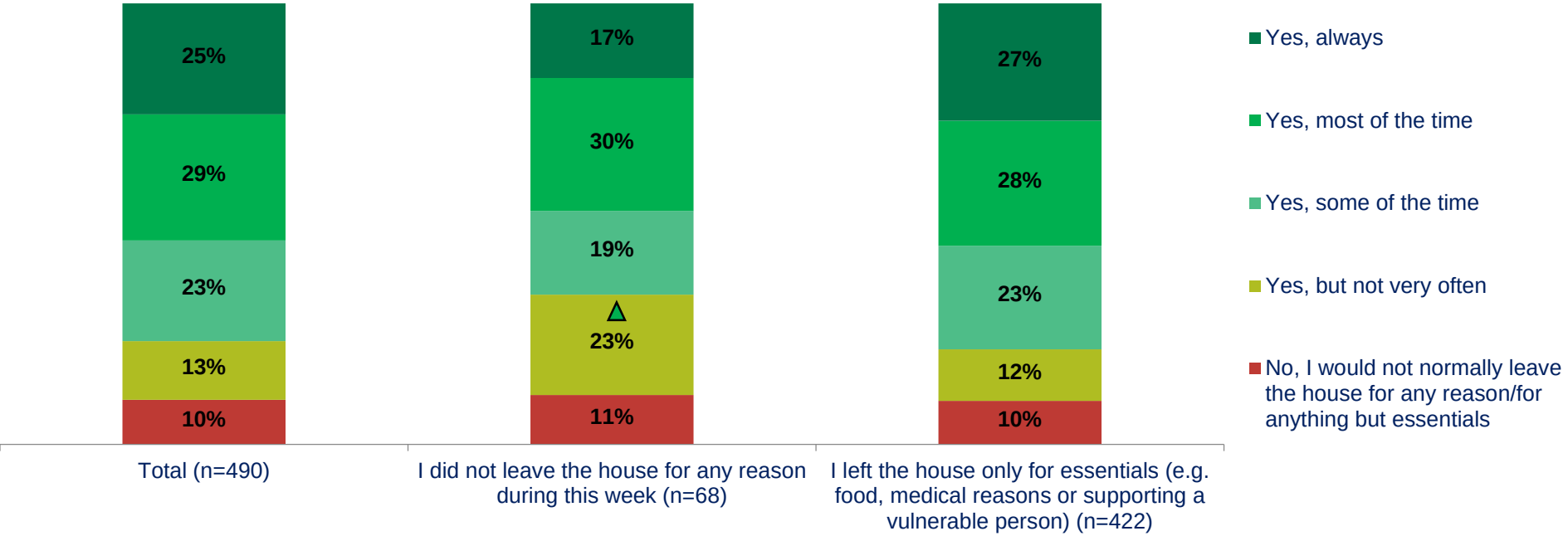
Reported activity and movement during the past seven days by alert level, excludes exercise



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

Of those currently self isolating, the majority indicate that this is not normal behaviour and that in a normal week, they would move around more than they have this week

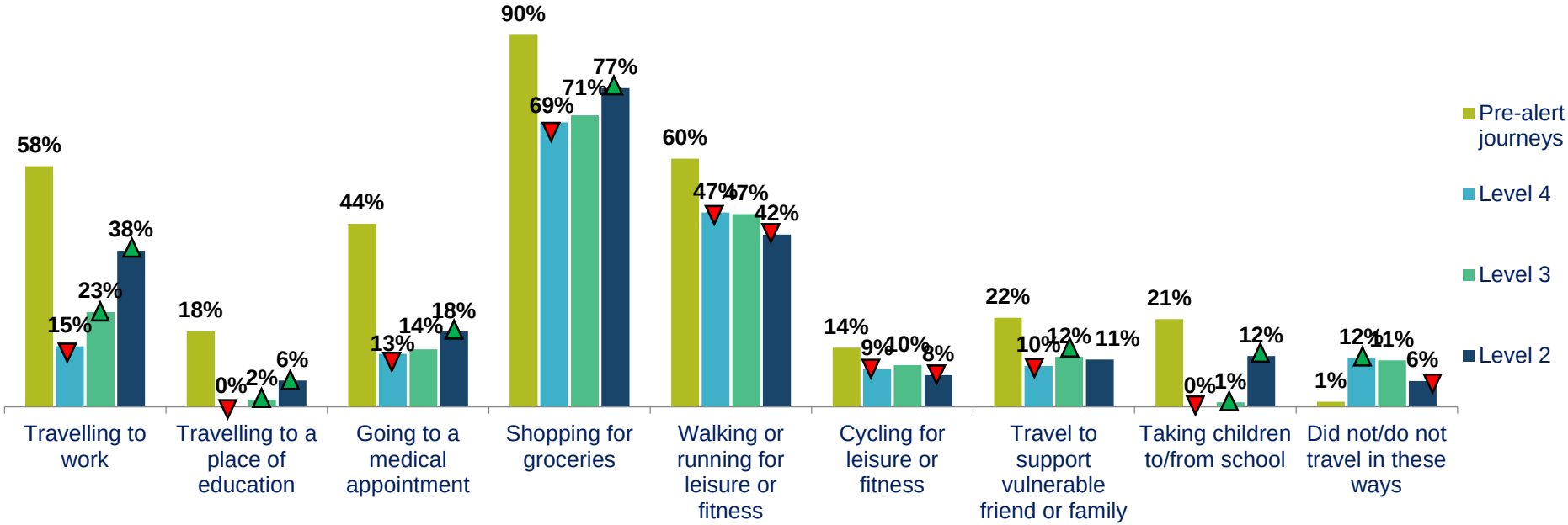
Reported activity and movement during the past seven days by alert level, excludes exercise



ISO_2_TRAVEL. In a typical week outside of any COVID-19 alert conditions (e.g. in February this year), would you normally leave the house for any other reasons?
Base:all adults 15+ in New Zealand

Reported engagement in most activities is continuing to trend upwards towards February levels

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

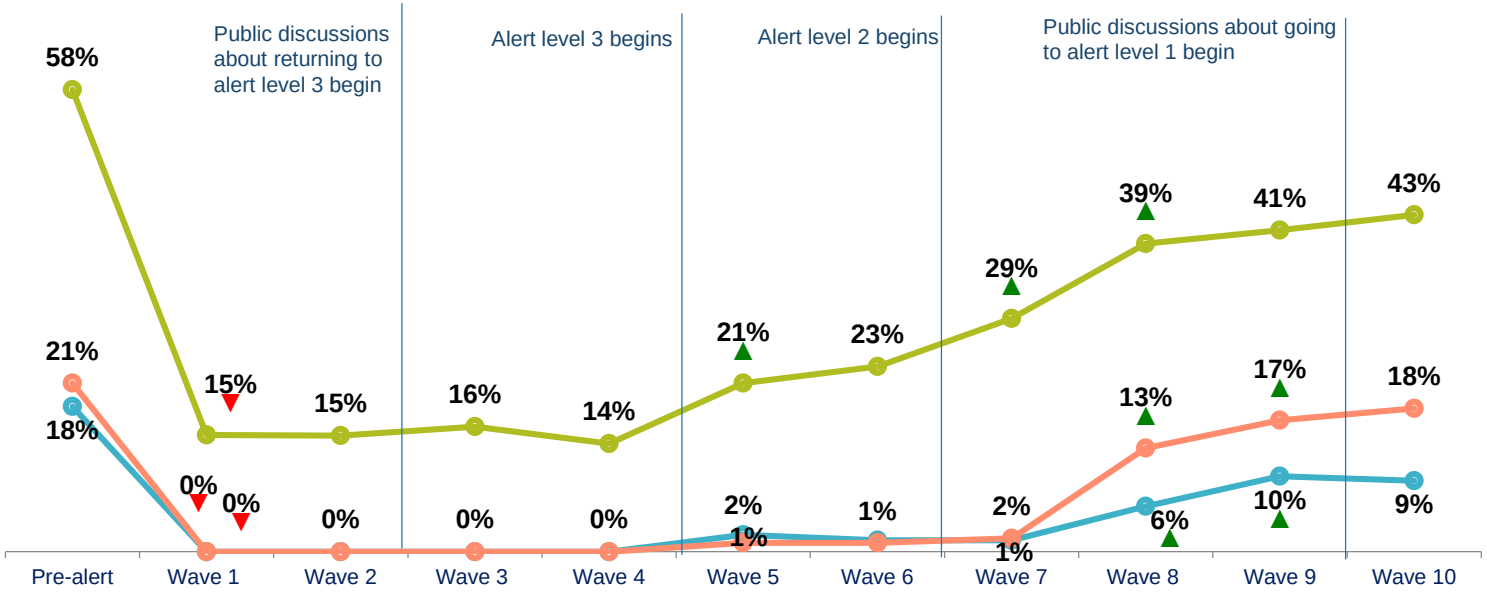


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)?/And which, if any of the following types of journeys did you make during the last seven days?

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

There has been something of a plateau in most of the growing activities, with much of the growth in work travel occurring in wave 7 and 8

Reported activity and movement during the past seven days by wave

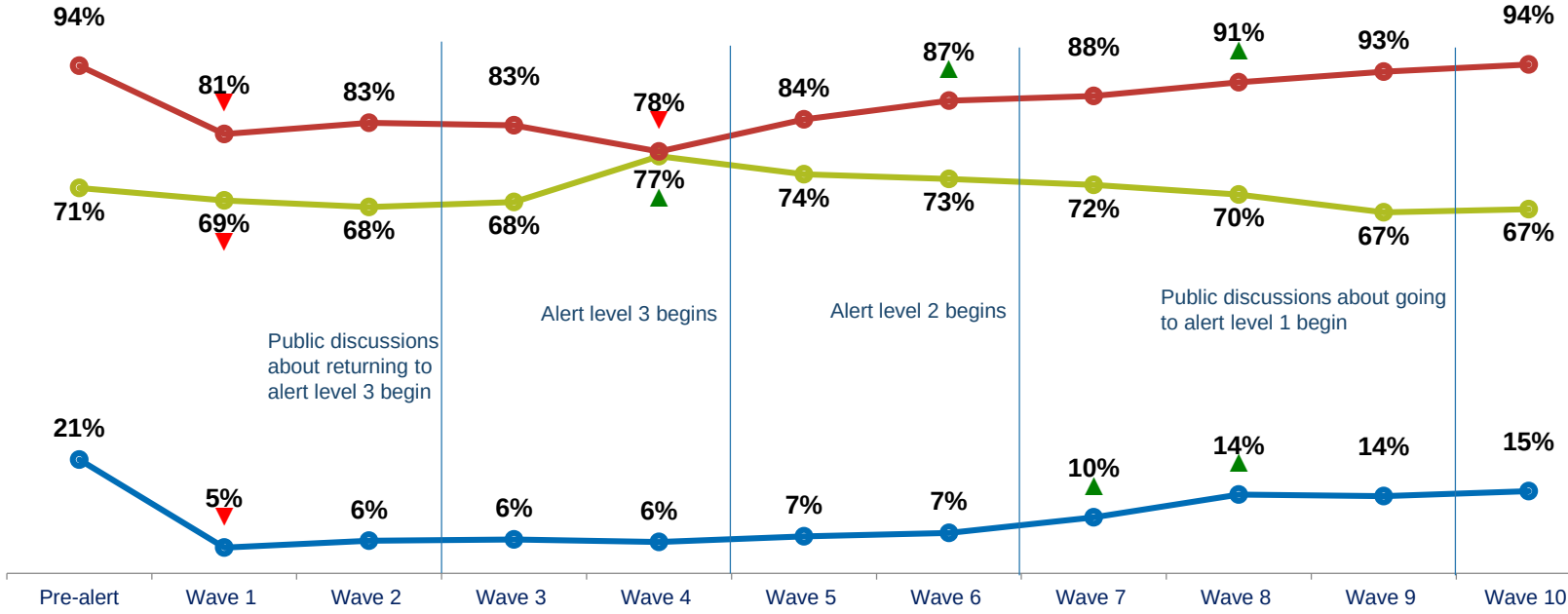


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)?/And which, if any of the following types of journeys did you make during the last seven days?

Base:all adults 15+ in New Zealand Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261)

While private vehicle usage has returned to normal, the recovery in public transport usage has not continued beyond the start of level 2

Changes in mode usage by wave

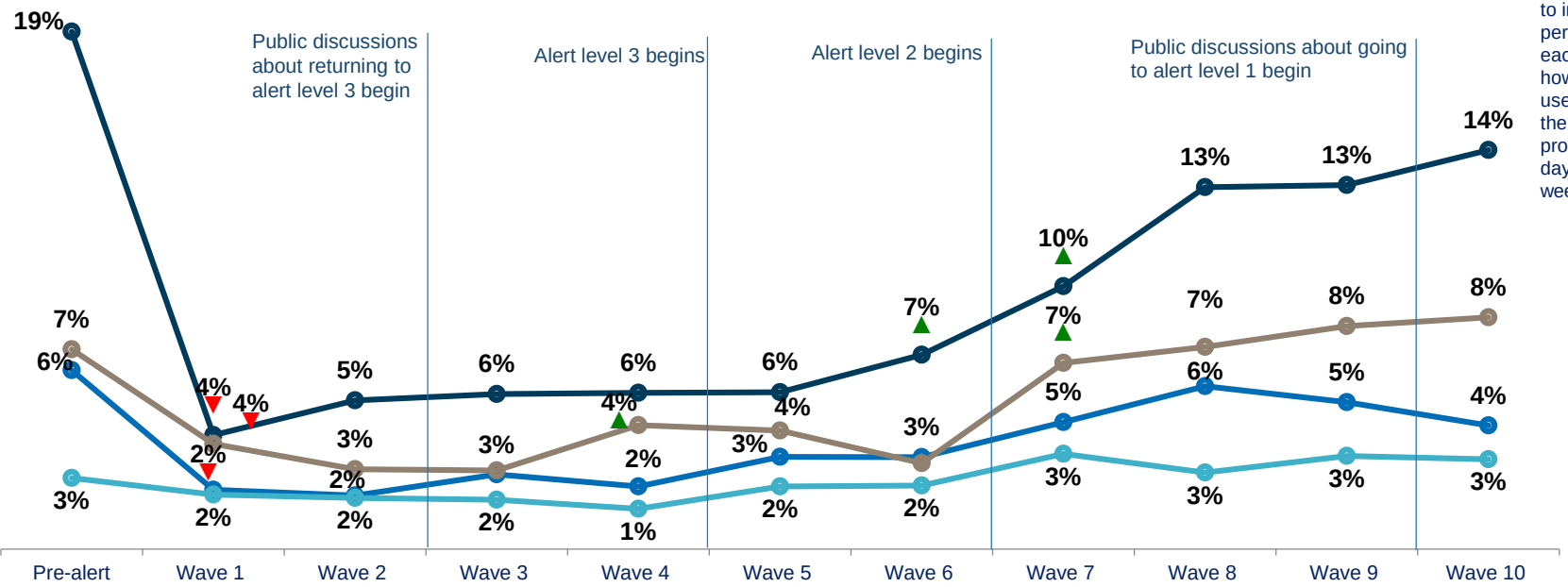


NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.

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

The proportion reporting any taxi usage is now above the reported pre-alert travel, but for most public transport modes it is still some way short

Changes in mode usage by wave



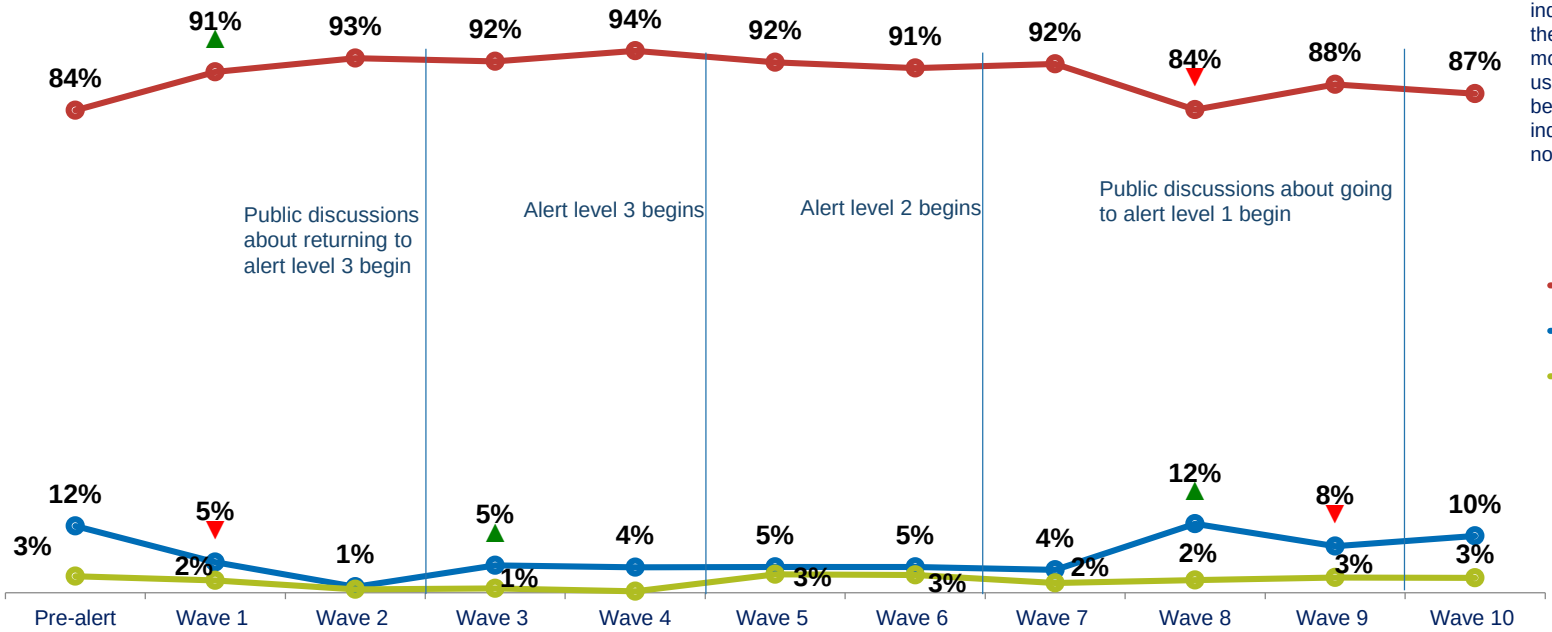
NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.

- Bus
- Train
- Ferry
- Taxi/ Uber

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)*

In wave 8, the share of commuter traffic briefly returned to pre-lockdown levels, but more have been commuting by private vehicle throughout

Changes in mode usage by wave – travelling to work



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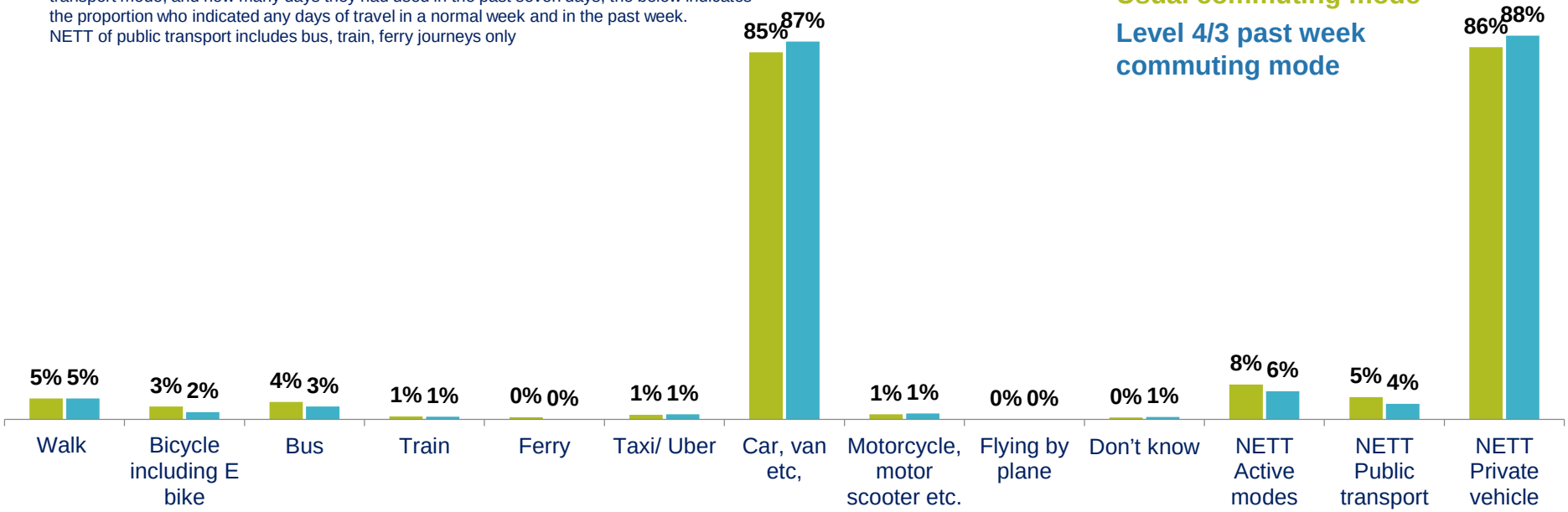
During levels 4 and 3, there was little indication of modal shift among those who were still travelling for work

Modes used in a normal week vs used in past week – travelling to work in level 4 or 3

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

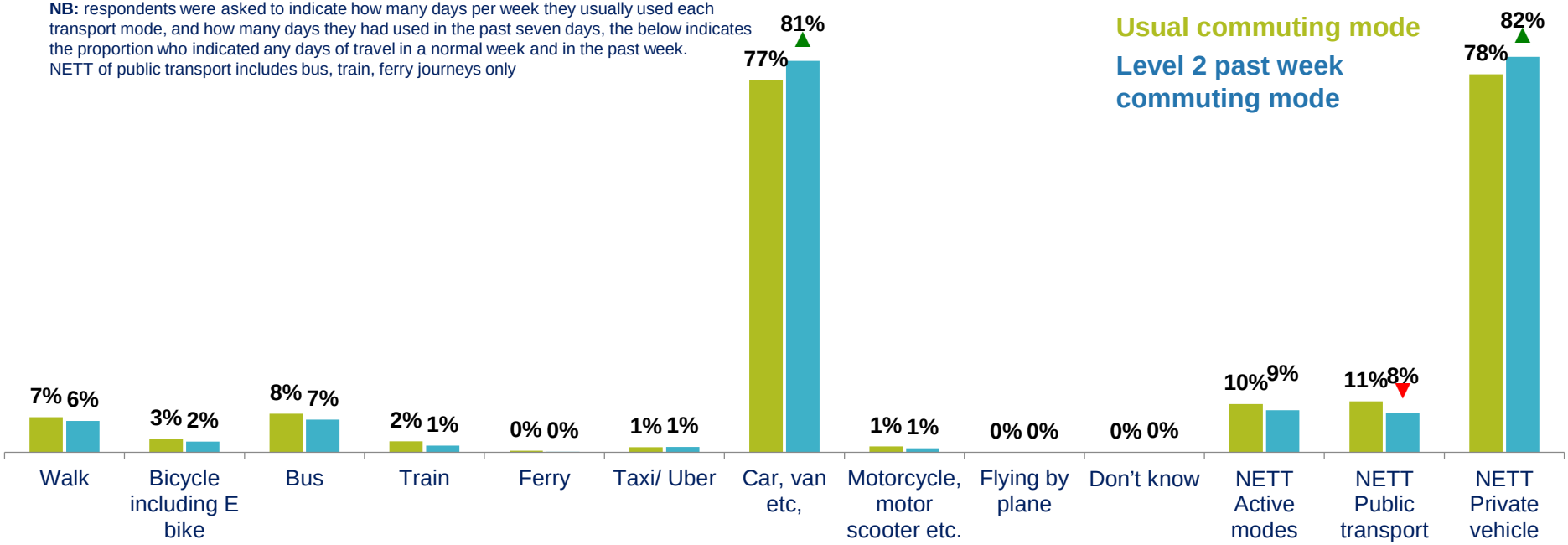


QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?
Base:all adults 15+ in New Zealand

In level 2, there is more of an indication of modal shift, with statistically significant decreases in public transport and an increase in private vehicles

Modes used in a normal week vs used in past week – travelling to work in level 2

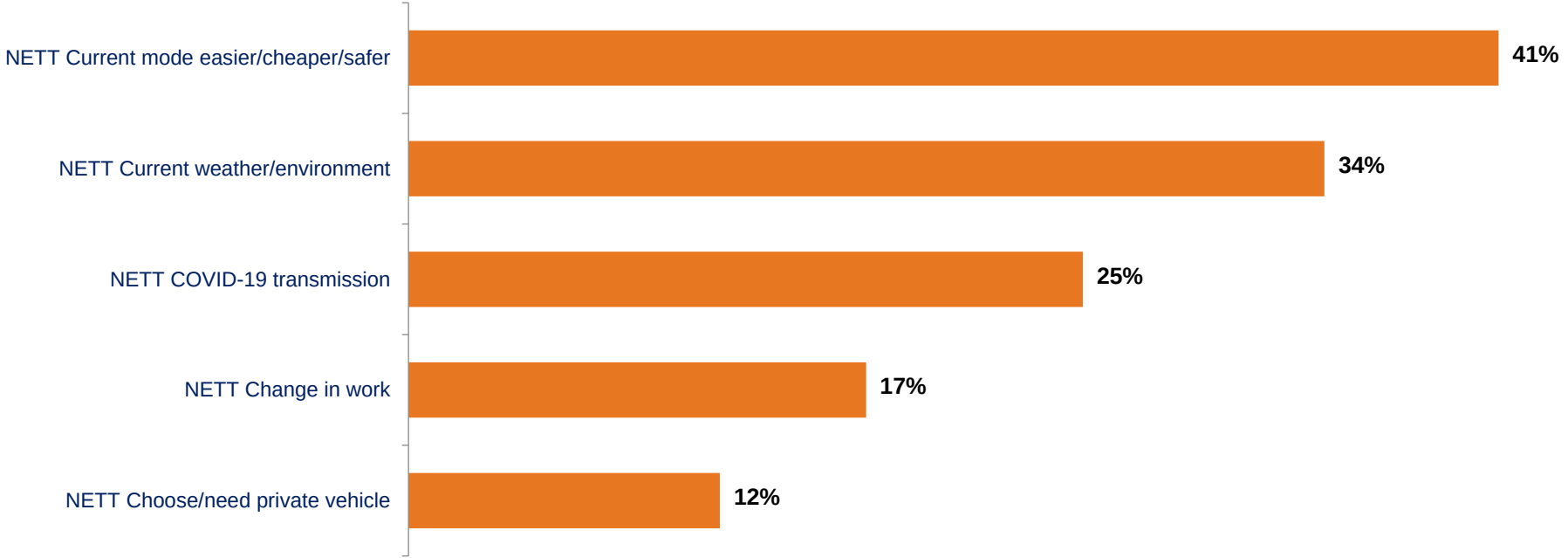
NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week. NETT of public transport includes bus,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

Of those who have changed commuting modes, COVID-19 concerns are cited by fewer than simple practical concerns of convenience, weather and price

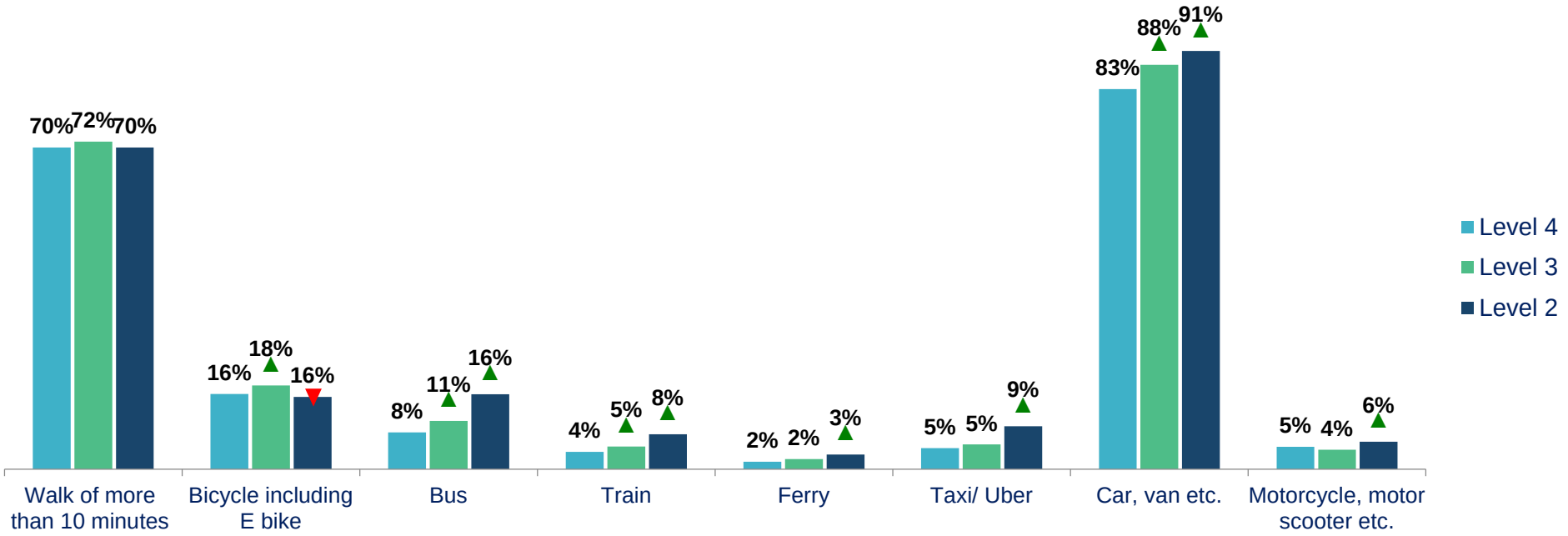
Reasons for changing commute mode



QWORKMODE. You indicated that in the past seven days you have travelled to work using a different mode to what you would have during a normal week. (e.g. in February of this year)
For which, if any of the following reasons did you change the way that you travelled to work?
Base:all adults 15+ in New Zealand who have changed commute mode (n=43)

All transport modes except for active modes have seen statistically significant increases in consideration during level 2

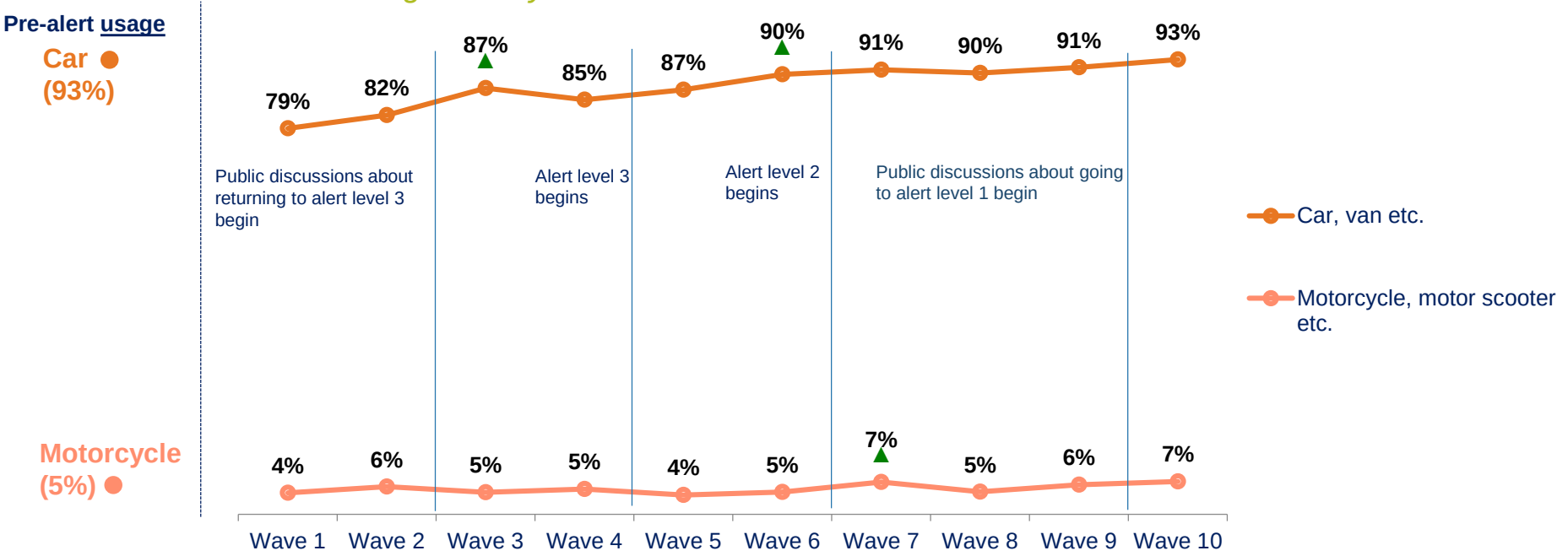
Mode consideration: coming week by alert level



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;

Consideration of private vehicles as a transport mode is now equal to or greater than normal levels of usage

Mode consideration: coming week by wave



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;

In the last weekend under level 2 conditions, consideration of the bus as a transport mode has now reached similar levels to pre-alert usage

Mode consideration: coming week by wave

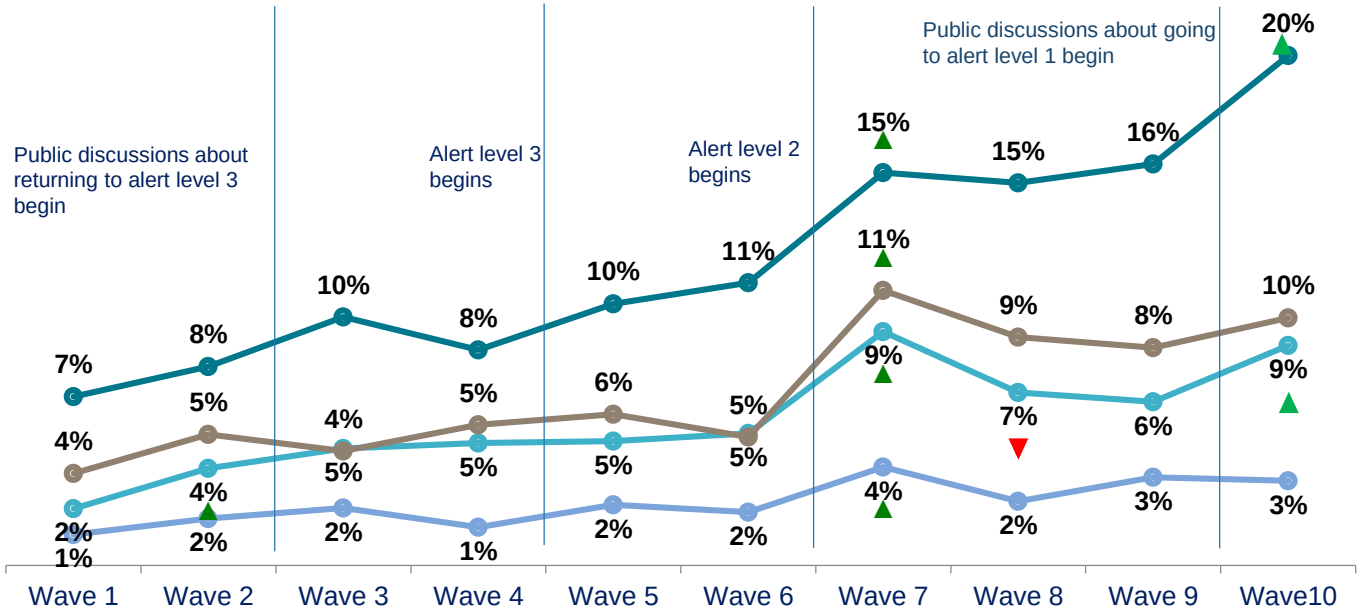
Pre-alert usage

Bus (19%)

Taxi/Uber (7%)

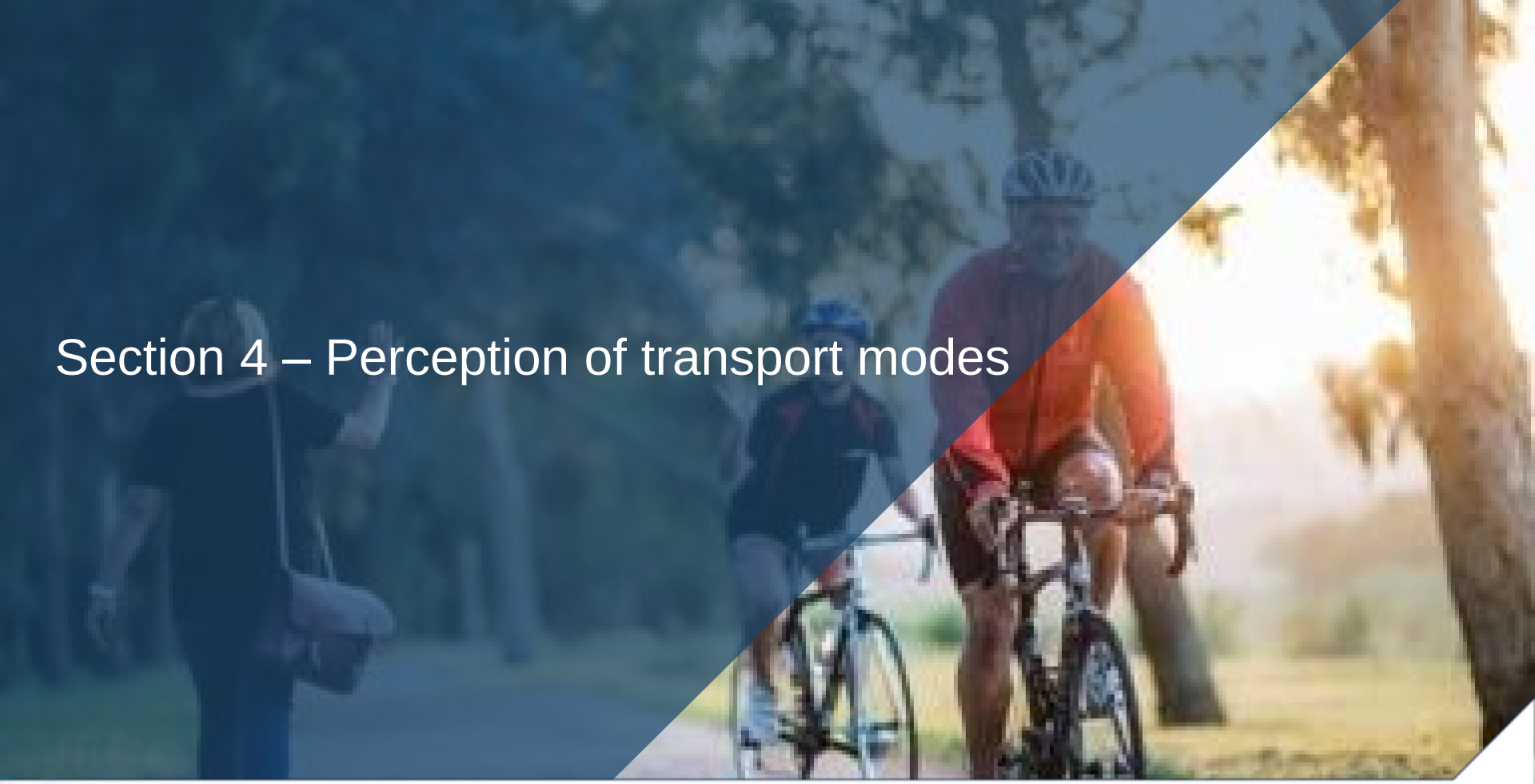
Train (6%)

Ferry (3%)



QPT2. If available next week, which if any of the following would you be likely to use?
Base:all adults 15+ in New Zealand who normally travel;

Section 4 – Perception of transport modes



Key findings – perceptions

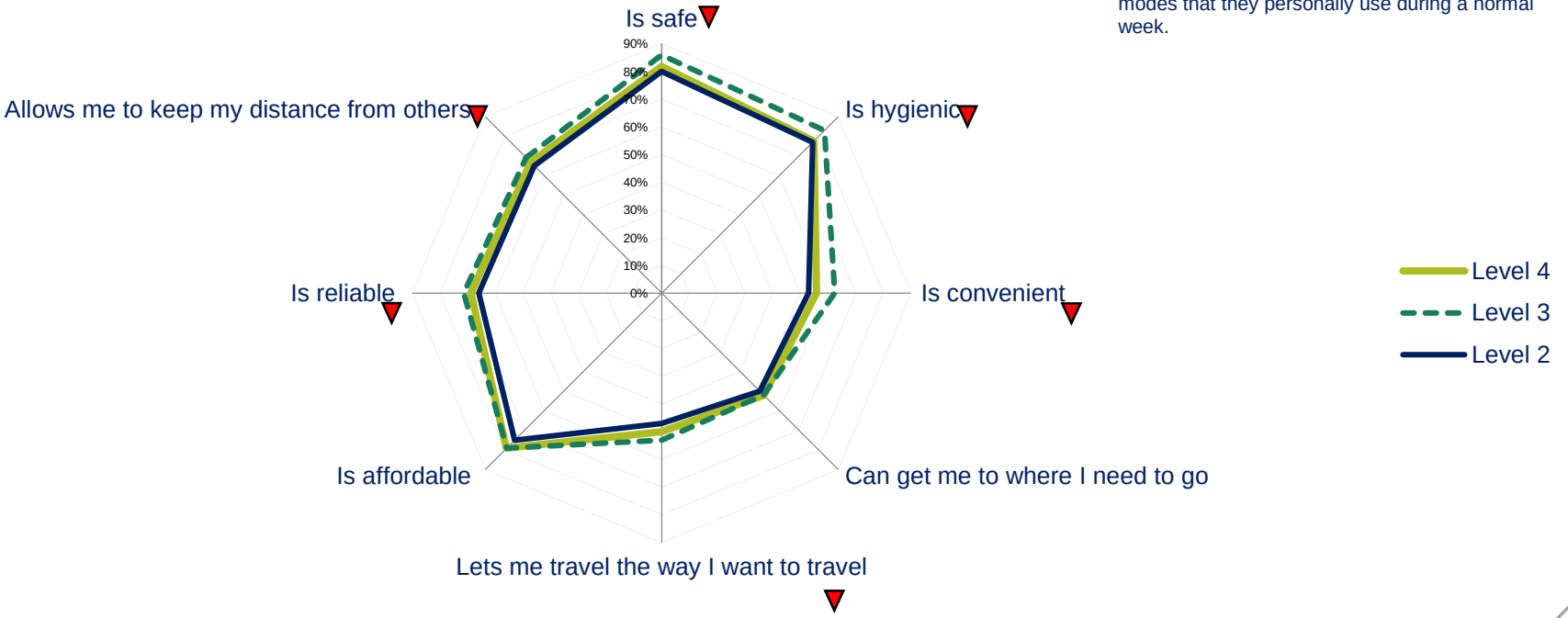
Waka Kotahi objective – how might people's perception of transport modes impact travel choices

- 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.
- After peaking during level 3, perceptions of active modes have declined as more and more people have begun to resume their normal travel patterns in level 2.
- Public transport modes continue to improve perceptions in some areas, with safety, hygiene and convenience improving for buses and no declines in any attributes for this mode.
- Trains however, are perceived as being significantly less reliable than they were in level 3, with safety the only attribute to see an improvement in level 2.
- Perceptions of taxis and ubers are largely unchanged from level 3, which had been a marked improvement on their level 4 scores.
- Cars are generally better perceived on most metrics

Perceptions of walking as a transport mode peaked in level 3 when travel by this mode was at its highest

Perceptions of walking

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

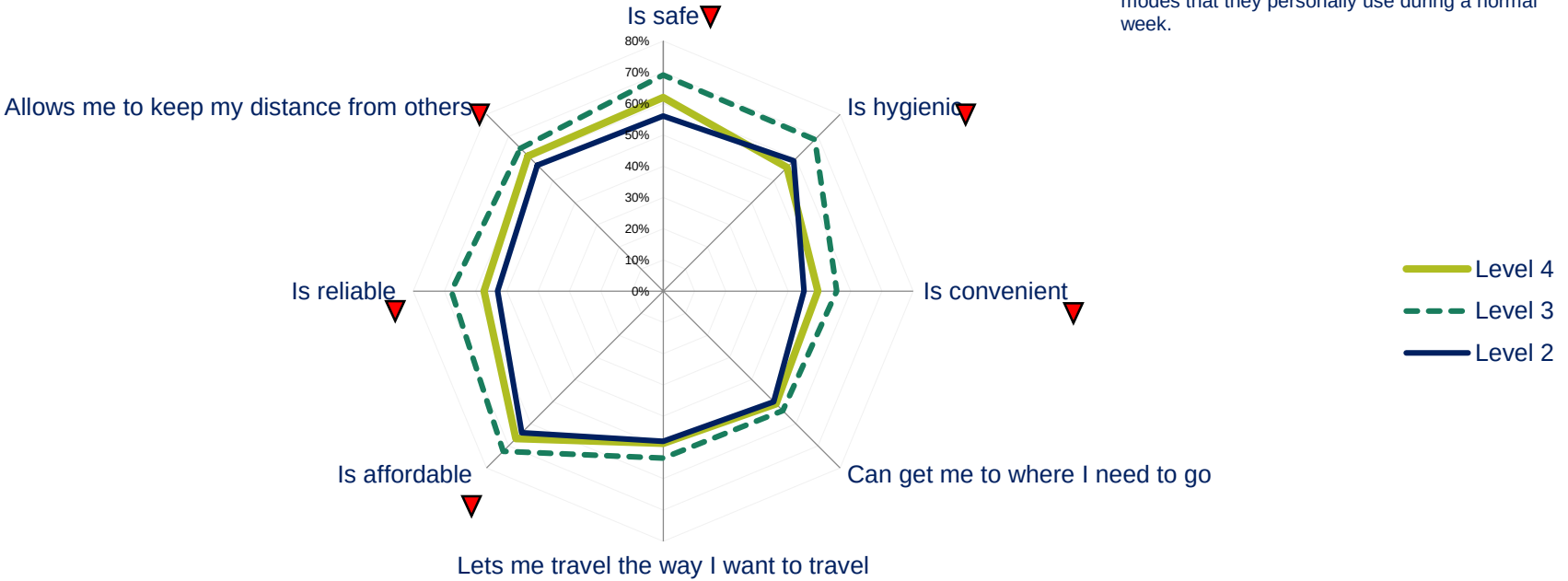


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who normally use walking as a means of travel: level 4 (n=1,445), level 3 (n=736); level 2 (n=1,581)

This is also the case for cycling, which has seen a more pronounced decline in perceptions from the level 3 peak

Perceptions of bicycle including e-bike

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

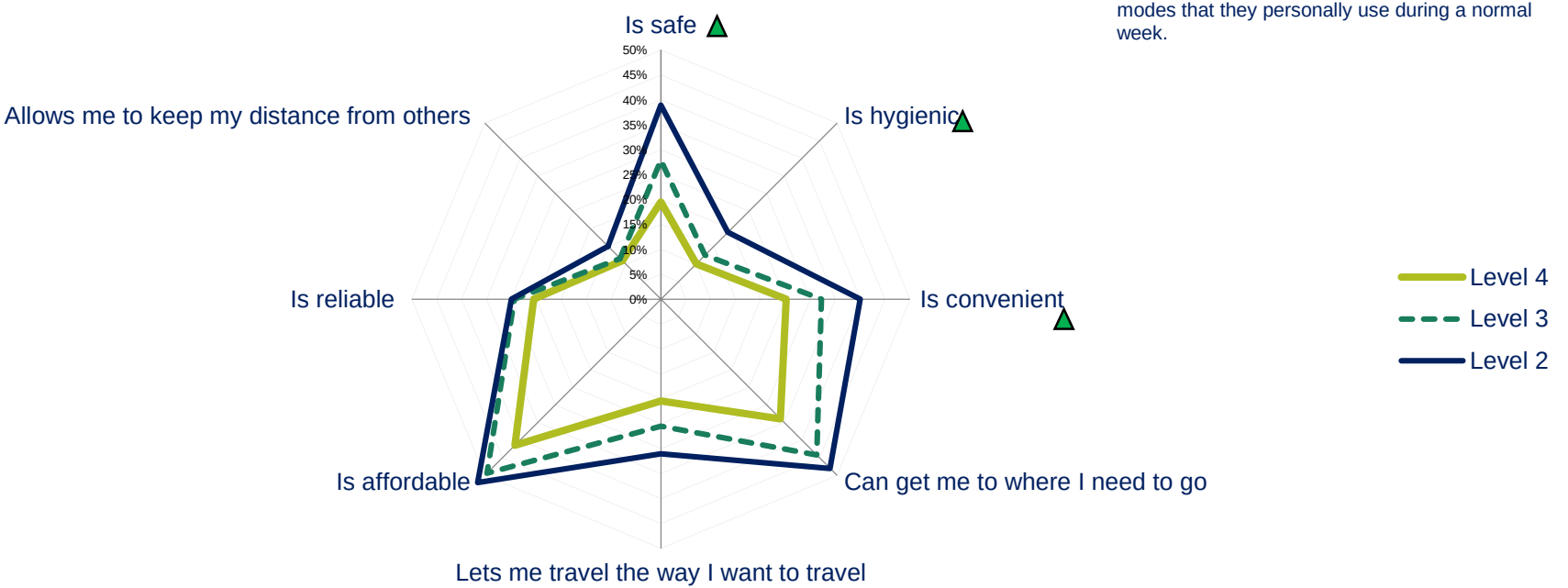


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by bike normally: level 4 (n=782), level 3 (n=419); level 2 (n=797)

The proportion associating the bus with safety, hygiene and convenience has significantly increased in level 2

Perceptions of the bus

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

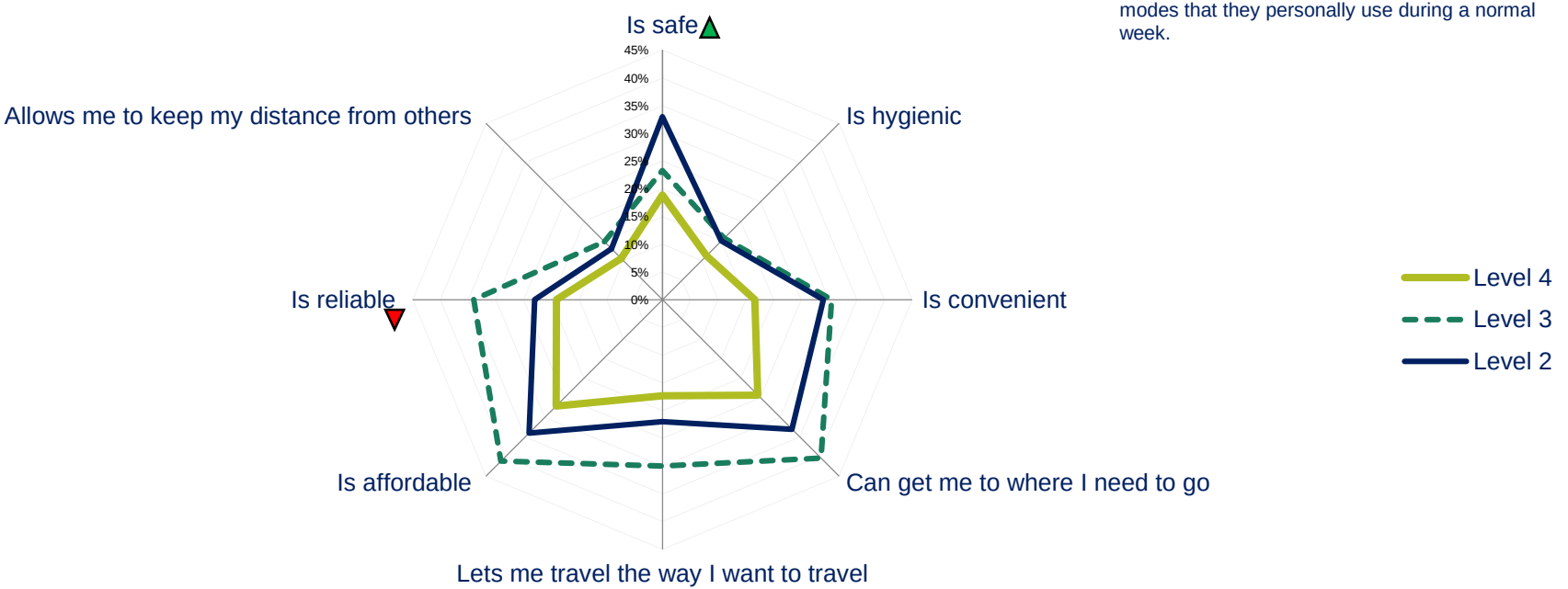


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by bus normally: level 4 (n=943), level 3 (n=452); level 2 (n=981)

As much as trains have gained ground on perceptions of safety, reliability has significantly dropped off in level 2

Perceptions of the train

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

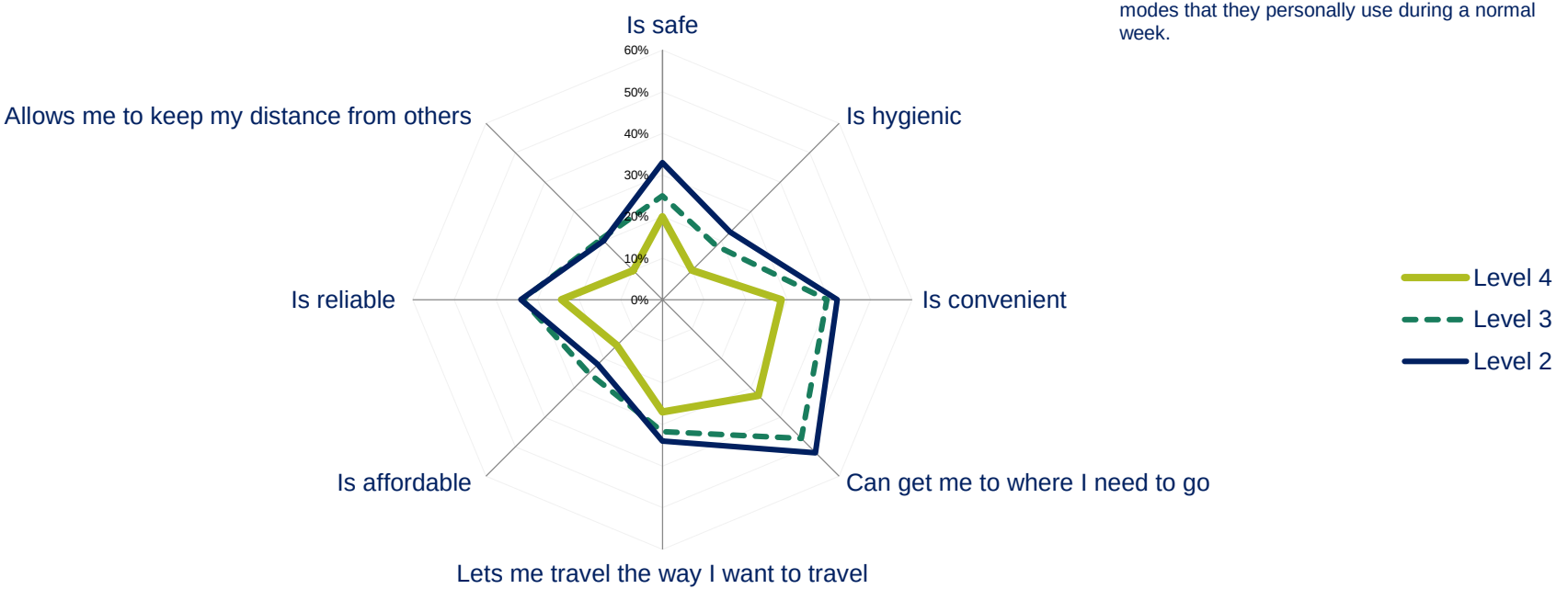


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by train normally: level 4 (n=323), level 3 (n=160); level 2 (n=407)

While there have been no statistically significant changes, perceptions of private hire vehicles have grown directionally between levels

Perceptions of taxi / uber

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

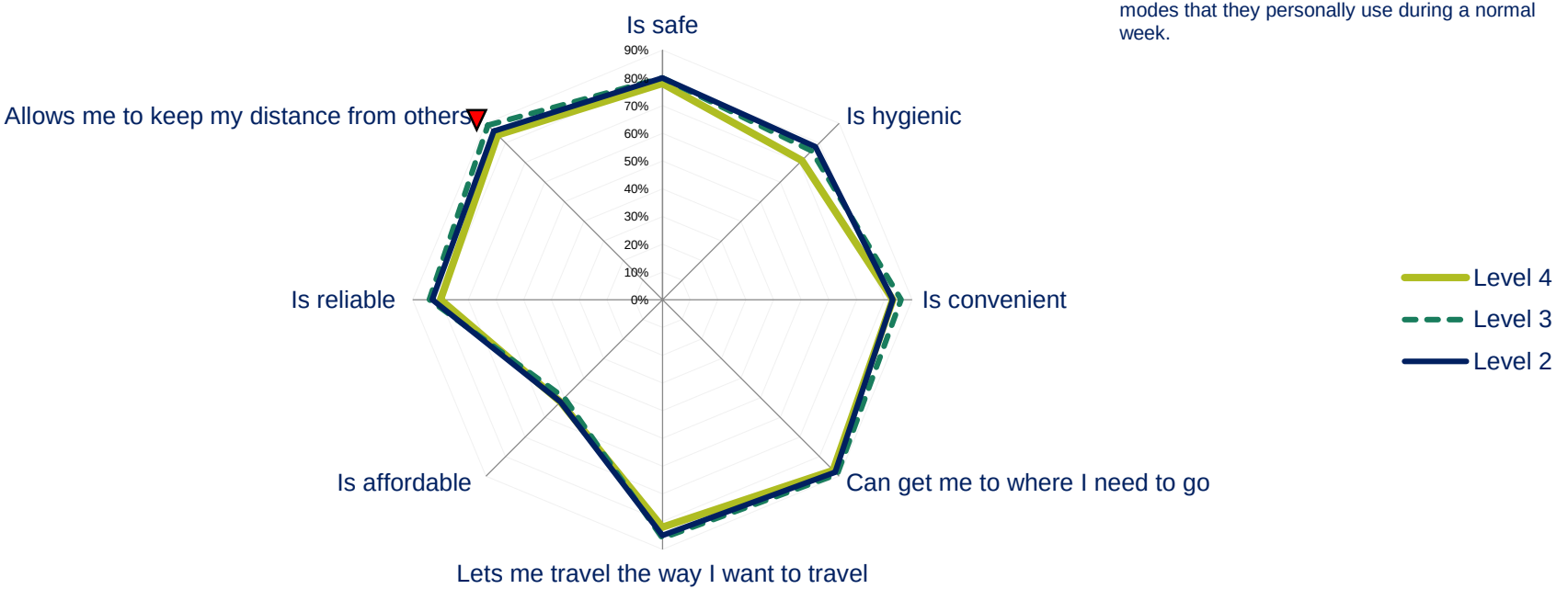


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who normally travel by uber / taxi: level 4 (n=355), level 3 (n=164); level 2 (n=473)

Aside from on affordability, cars outperform most modes on most perceptions

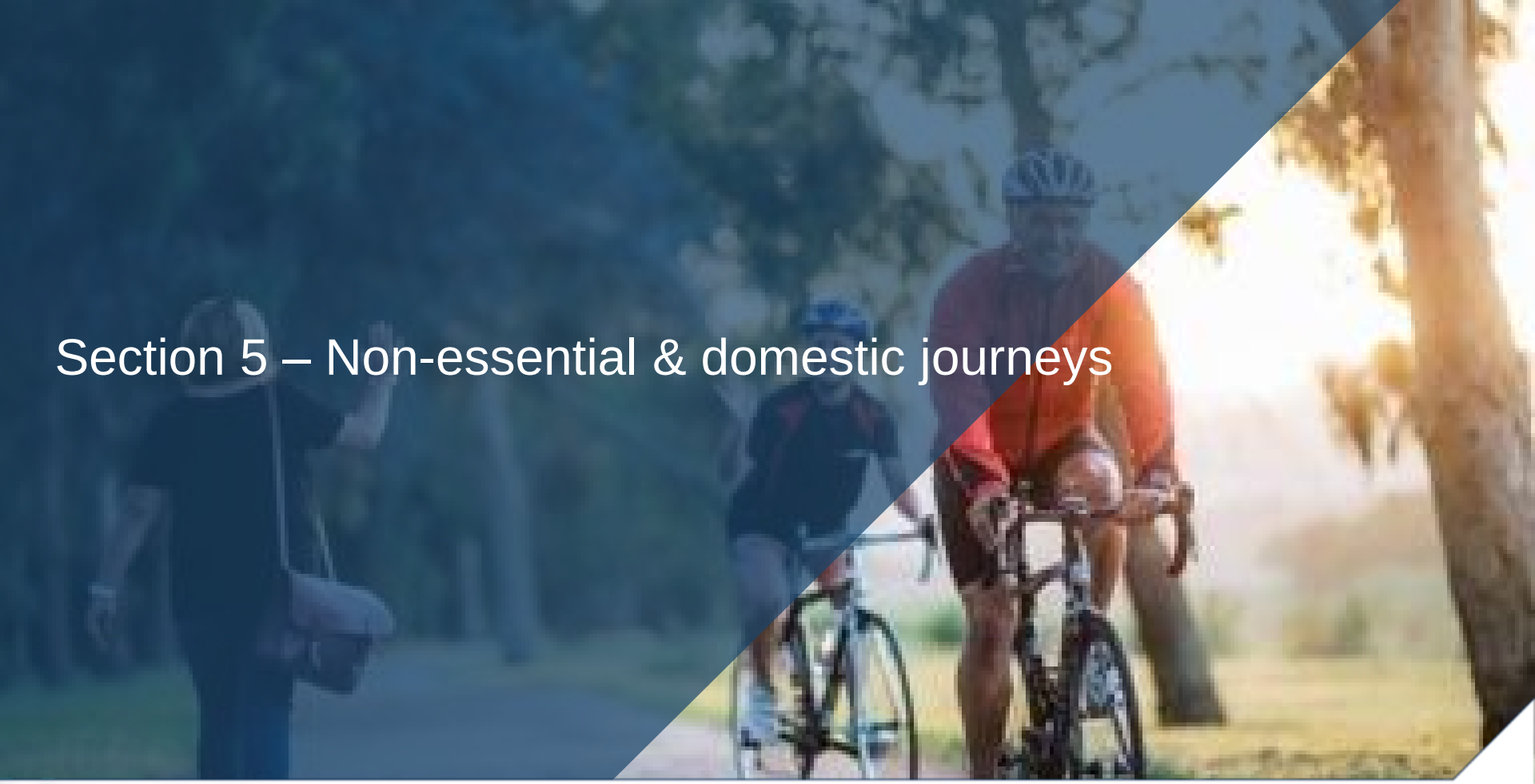
Perceptions of Car / Van

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 normally travel by car / van: level 4 (n=1,453), level 3 (n=746); level 2 (n=1,586)

Section 5 – Non-essential & domestic journeys



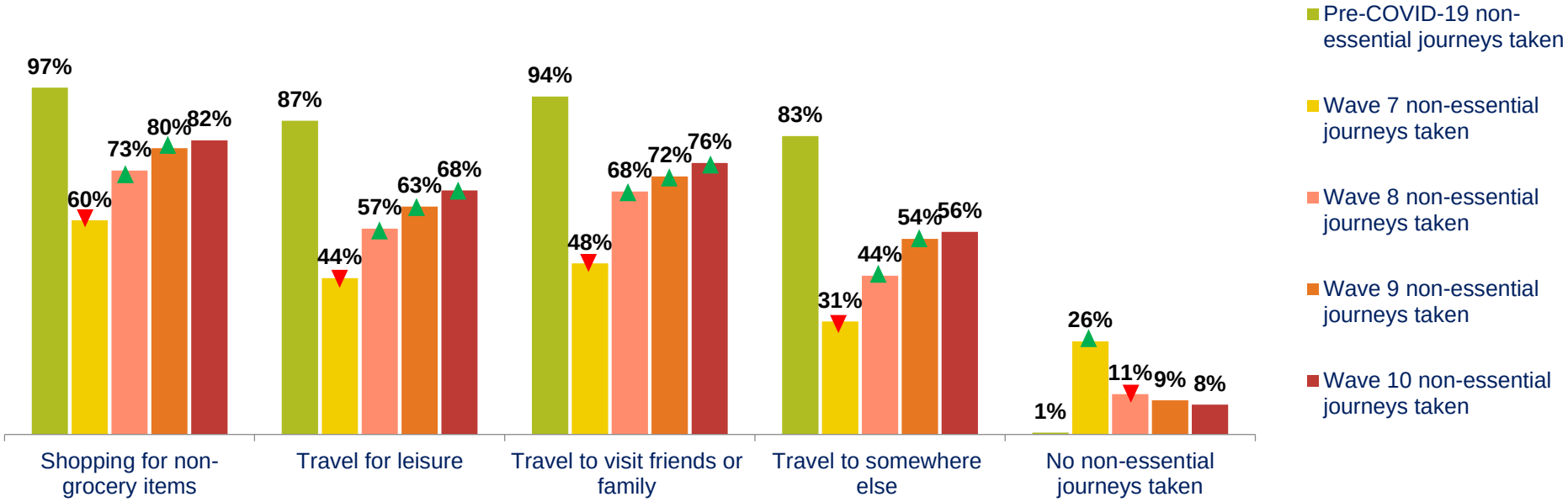
Key findings – non-essential & domestic journeys

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

- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have begun to measure non-essential journeys, and the ways domestic inter-regional travel is being taken up in level 2.
- The reported incidence of all types of non-essential journeys has been recovering, but is yet to match pre-alert levels, with leisure travel and family visits both up significantly this 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 more than half of the population, with most of those visiting friends and family in other regions.
- Looking back at a week including a long weekend, one in 10 say they took a holiday during this time, up significantly from the previous week.

Most forms of non-essential journeys have continued to grow in wave 10, but all activities are still some way short of reported pre-alert activity

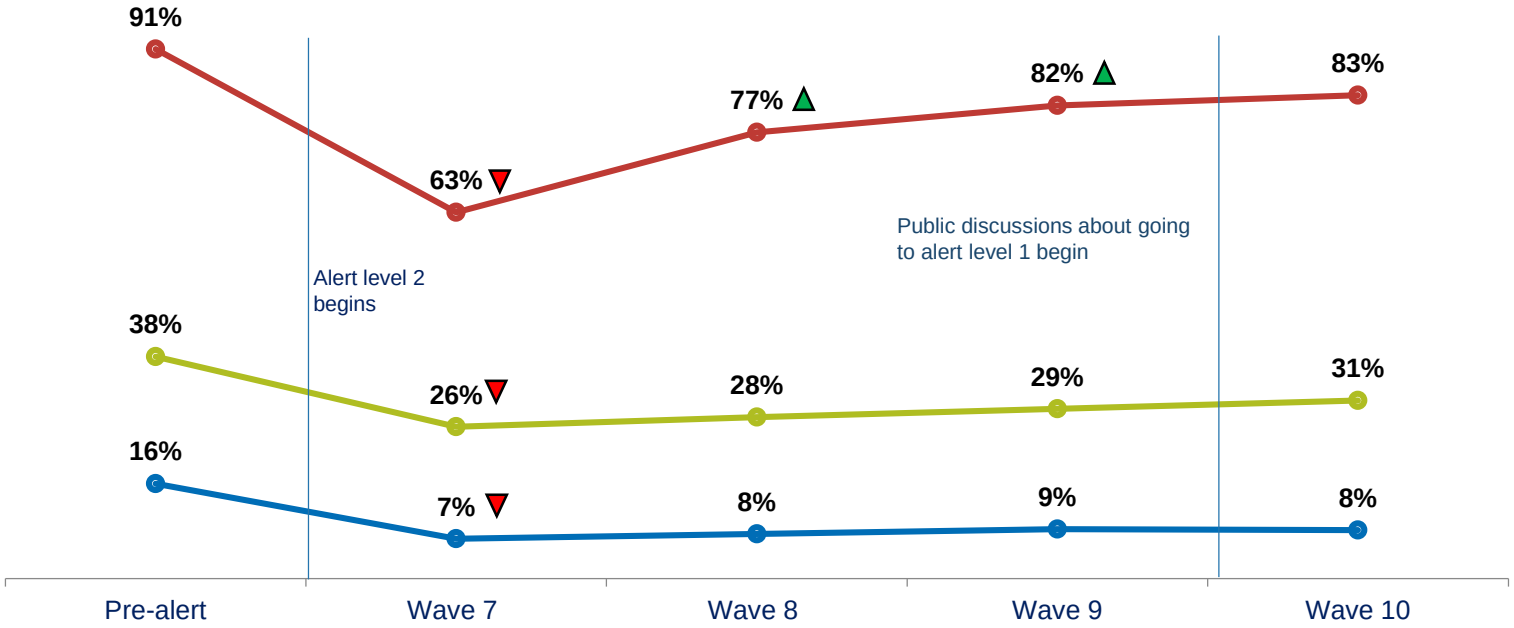
Non-essential journeys



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=5,043)

Public transport and active mode usage for non-essential journeys have not recovered at the same rate as private vehicle travel

Mode usage: non-essential journeys

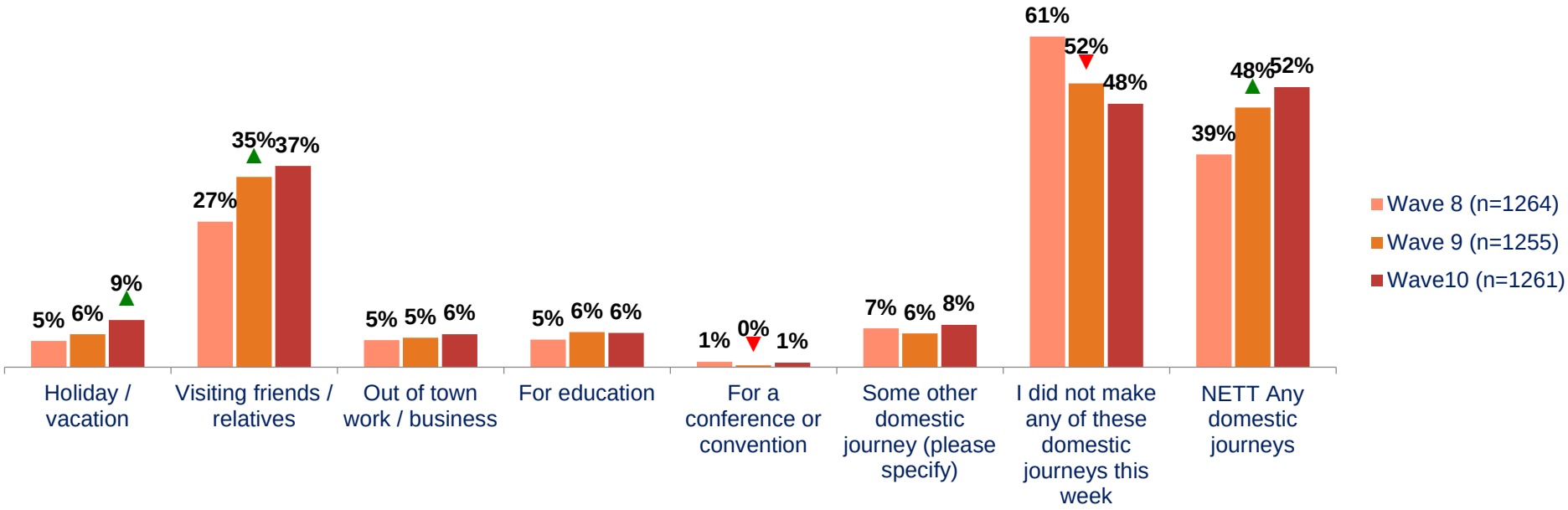


QMODE1A/2A. How would you normally make each of the following types of journeys? / And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?

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), wave 10 (n=1,261)

Although growth has slowed, more than half report travelling domestically in the past week, with nearly one in 10 taking a holiday of some sort

Domestic journeys in the past seven days by wave



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

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

Section 6 – Future domestic tourism

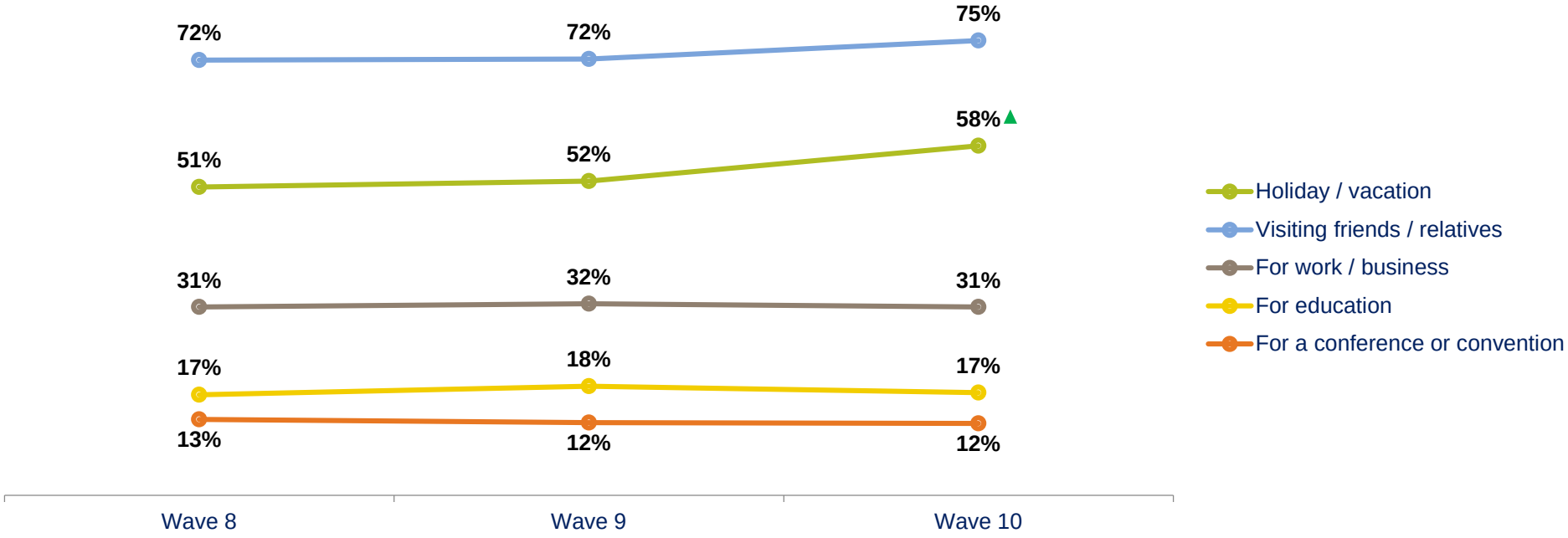
Key findings – future domestic tourism

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

- In light of restricted international travel, it is important to understand how domestic travel and tourism may change and impact New Zealand's travel infrastructure.
- When it comes to those saying they're likely to travel for each reason, only holidays are trending upwards, although people are still more likely to intend to visit friends and family.
- Despite this when people are asked about how much they think they will travel compared to last year, a large proportion think their travel will decrease or stay the same.
- This means that there may be a net decrease in travel for most reasons, however there are indications that travel to visit friends and family may not be as significantly impacted in the medium term.
- There's been a gradual decrease in COVID-19 transmission concerns and expectations of travel disruption as reasons for travelling less.
- Nearly two thirds give reasons related to exploring and supporting New Zealand as a reason for intending to travel more.

Consideration of holiday travel increased significantly in wave 10, but generally the proportion likely to travel for most reasons remains stable

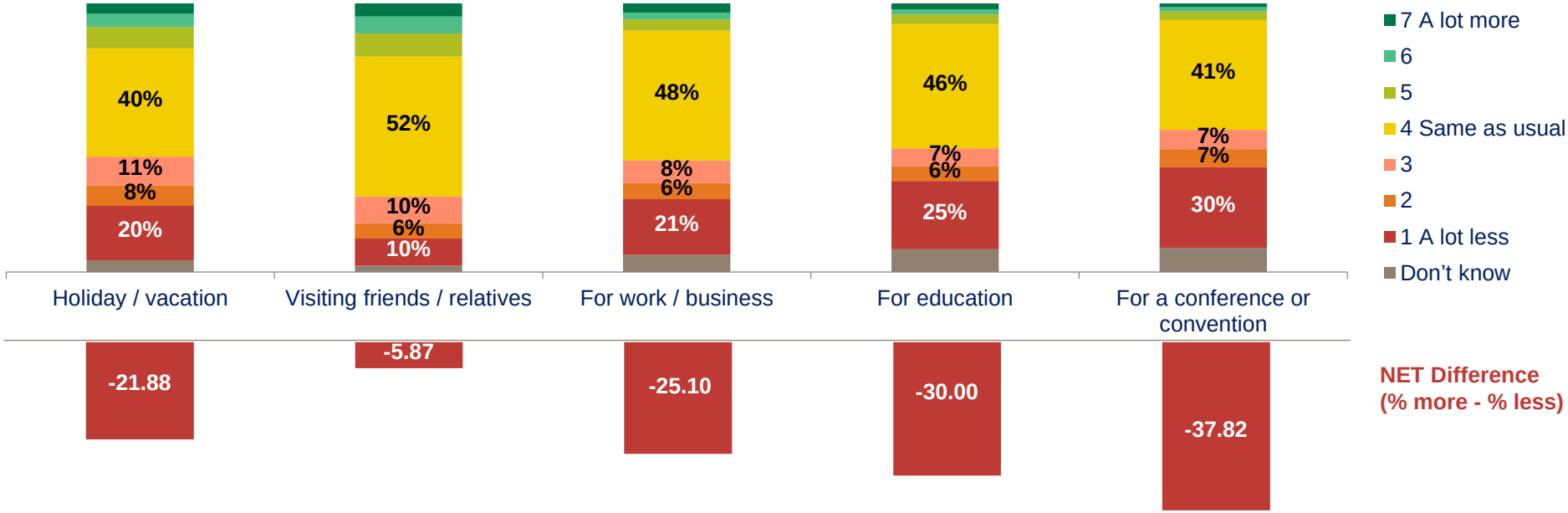
Proportion saying that they are likely to make domestic journeys in the next six months



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

Most think that they'll travel about the same in the next six months, but a large minority expect to travel less, indicating a net decrease in most forms of travel

Intention to travel more or less domestically

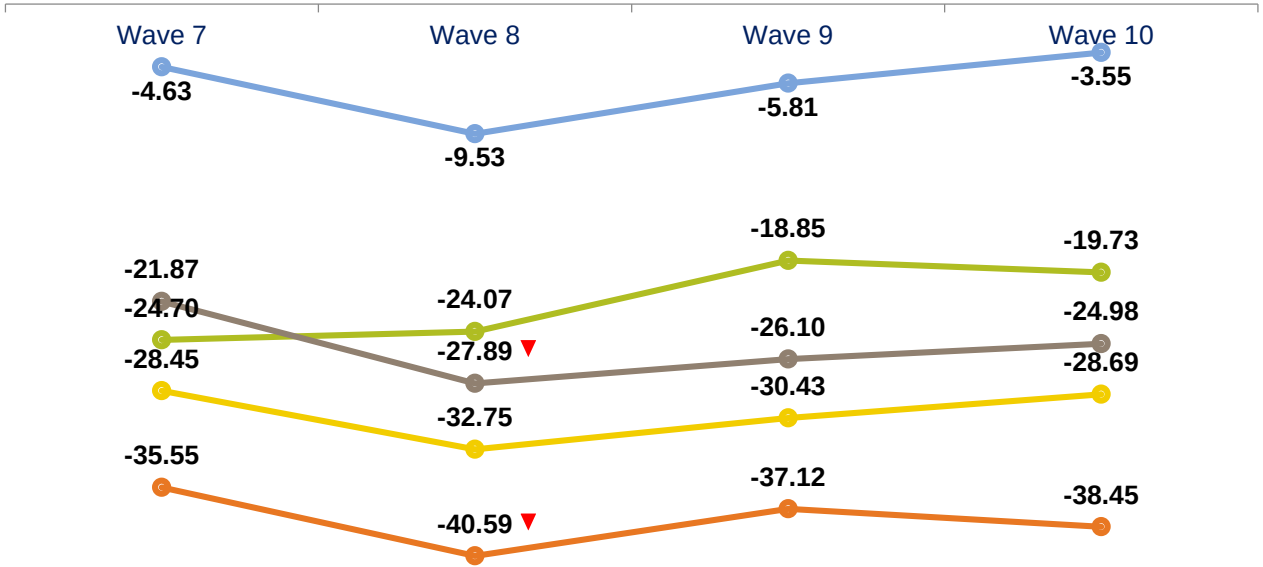


FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for…

Base:all adults 15+ in New Zealand

The net difference in intent to travel is trending back towards a level indicative of growth, but there is still some way to go for holiday, business & education travel

Intention to travel domestically

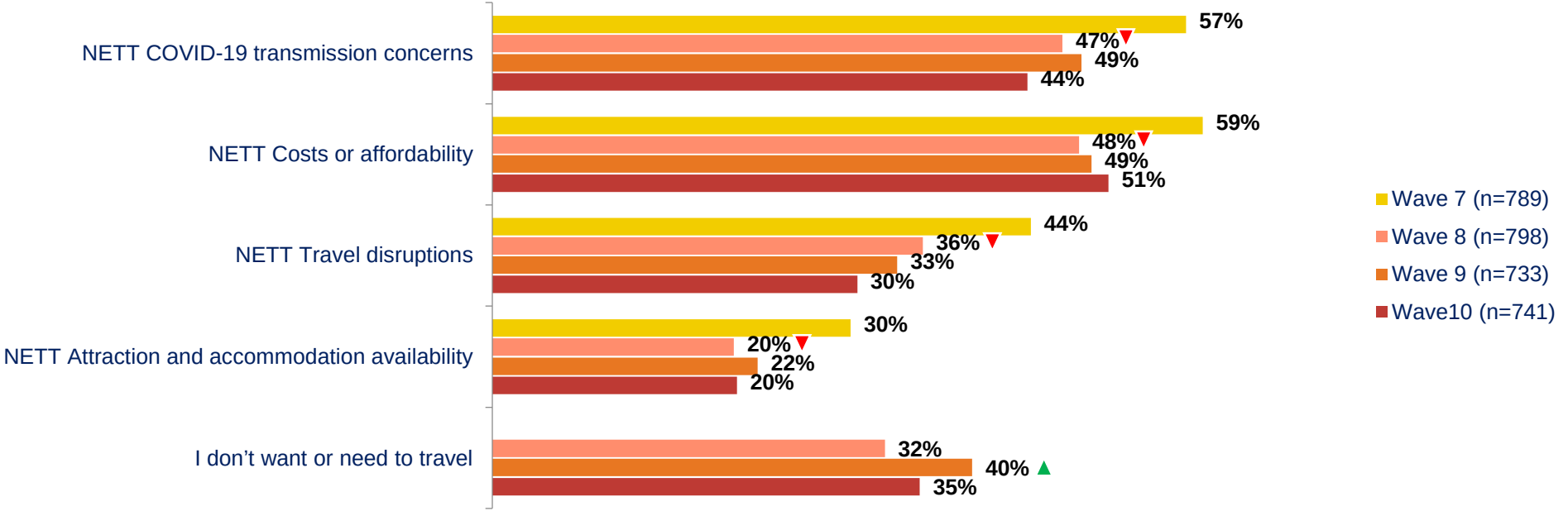


FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for…

Base:all adults 15+ in New Zealand

In general the reasons not to travel aren't shifting significantly, but there are directional decreases in transmission concerns and travel disruption worries

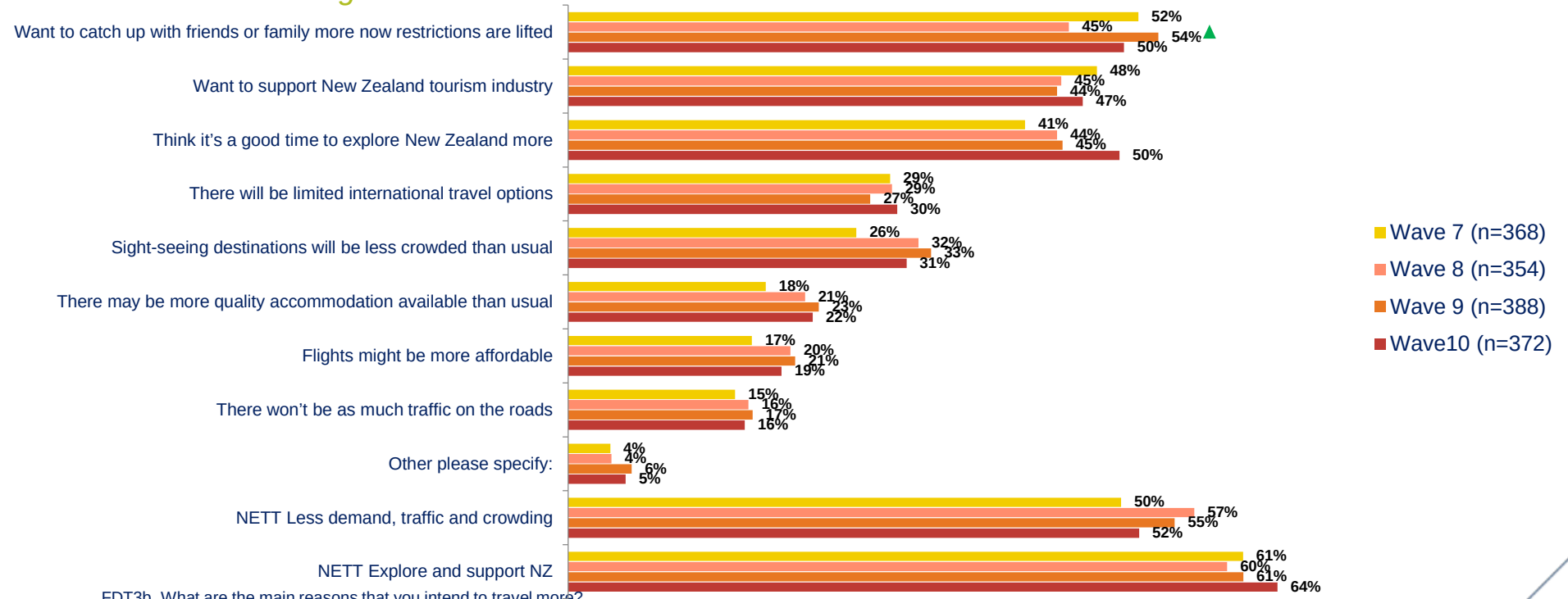
Reasons for travelling less



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

Motivations for travelling for tourism are generally unchanged from preceding waves, but friends and family are still one of the bigger individual drivers

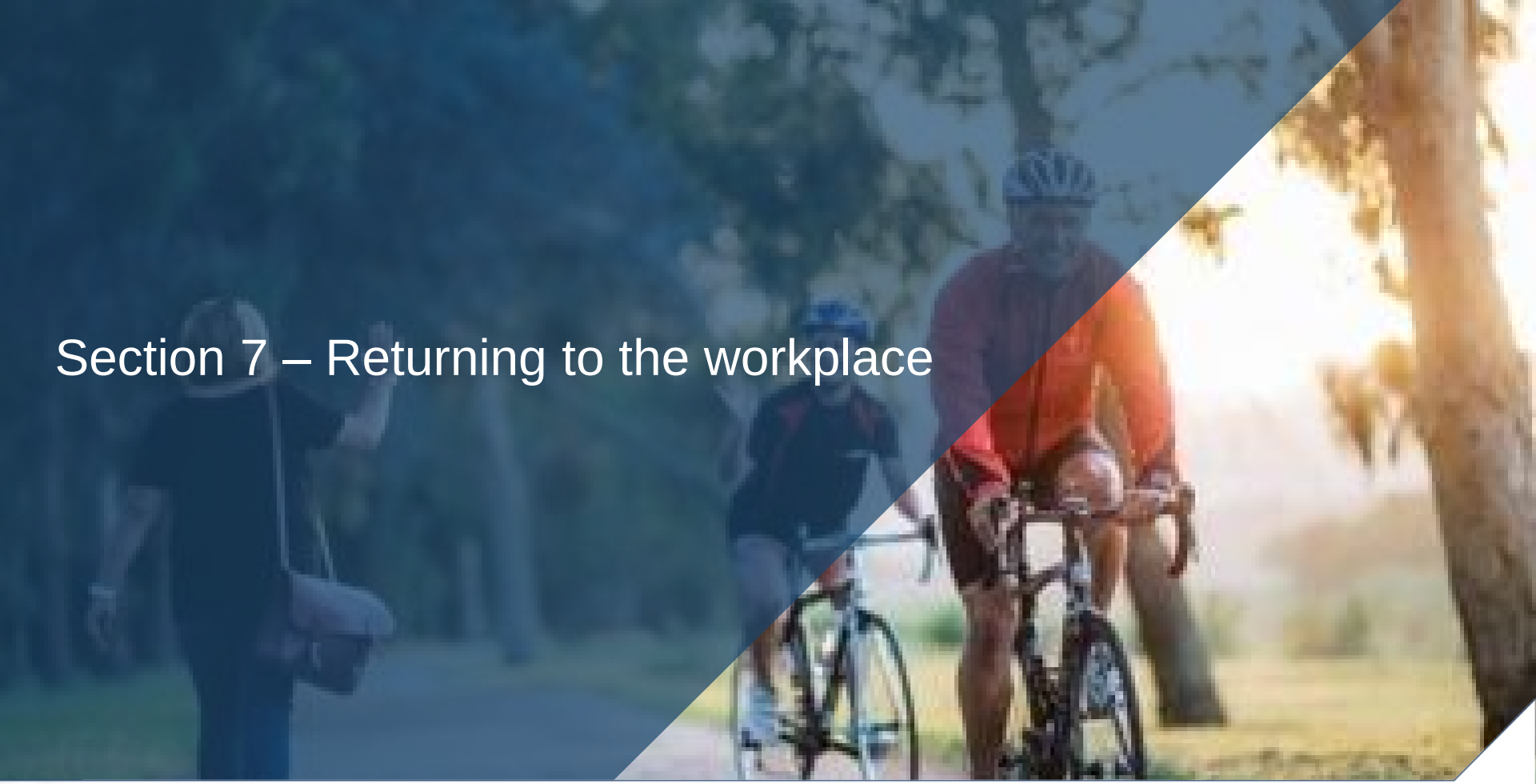
Reasons for travelling more



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

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

Section 7 – Returning to the workplace



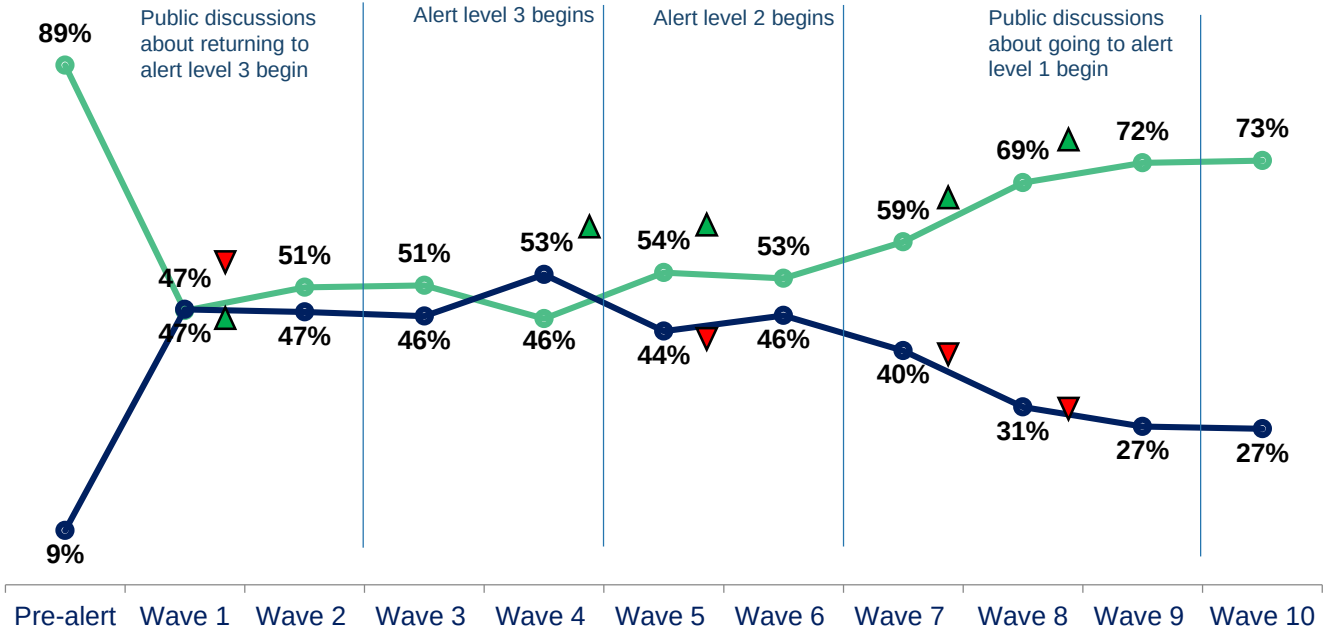
Key findings – returning to the workplace

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 has held steady at three quarters of workers during the final weeks of level 2.
- For all modes, the number of commuting days is still down compared to pre-alert levels, with the gap largest for public transport commuters.
- Although a third of those still working from home say they'd prefer to do so full time, when re-based as a proportion of the total working population this works out to be roughly the same as the proportion working from home before the COVID-19 lockdown began.
- However, a not insignificant proportion would like to continue working from home for the majority of the week, which might result in less commuter traffic on some days.

The split between working home and returning to the office has levelled out in the final weeks of level 2

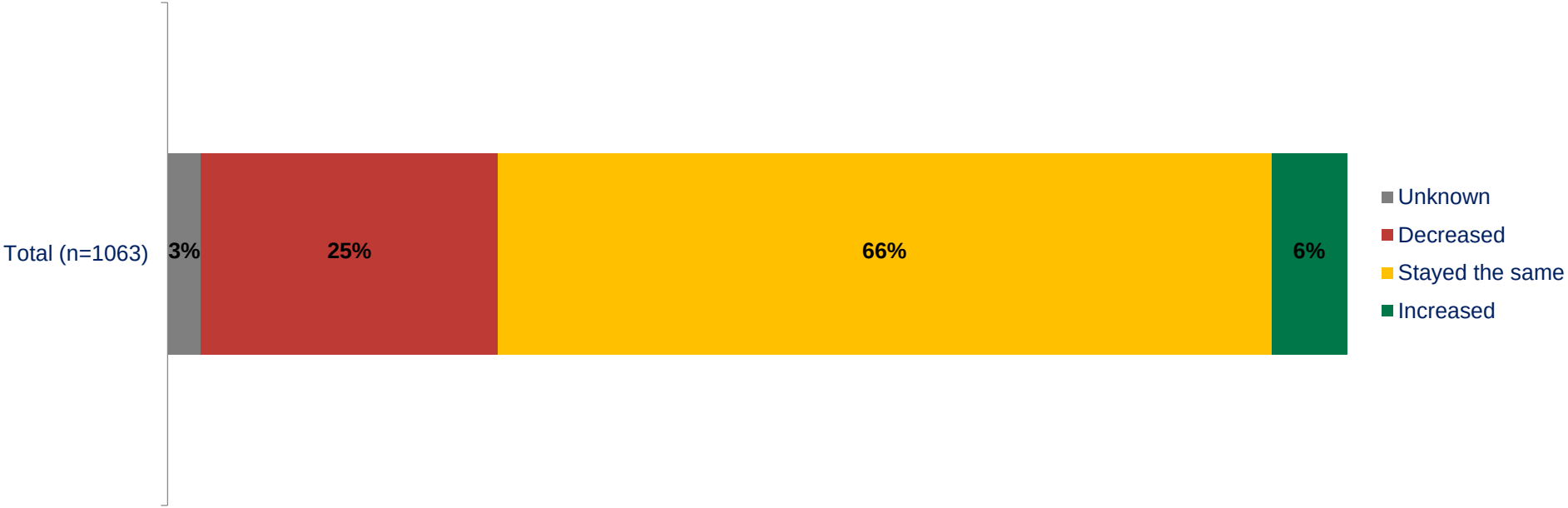
Proportion working in and out of home by survey wave



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

A quarter say their commuting days have decreased, with two thirds saying they are unchanged

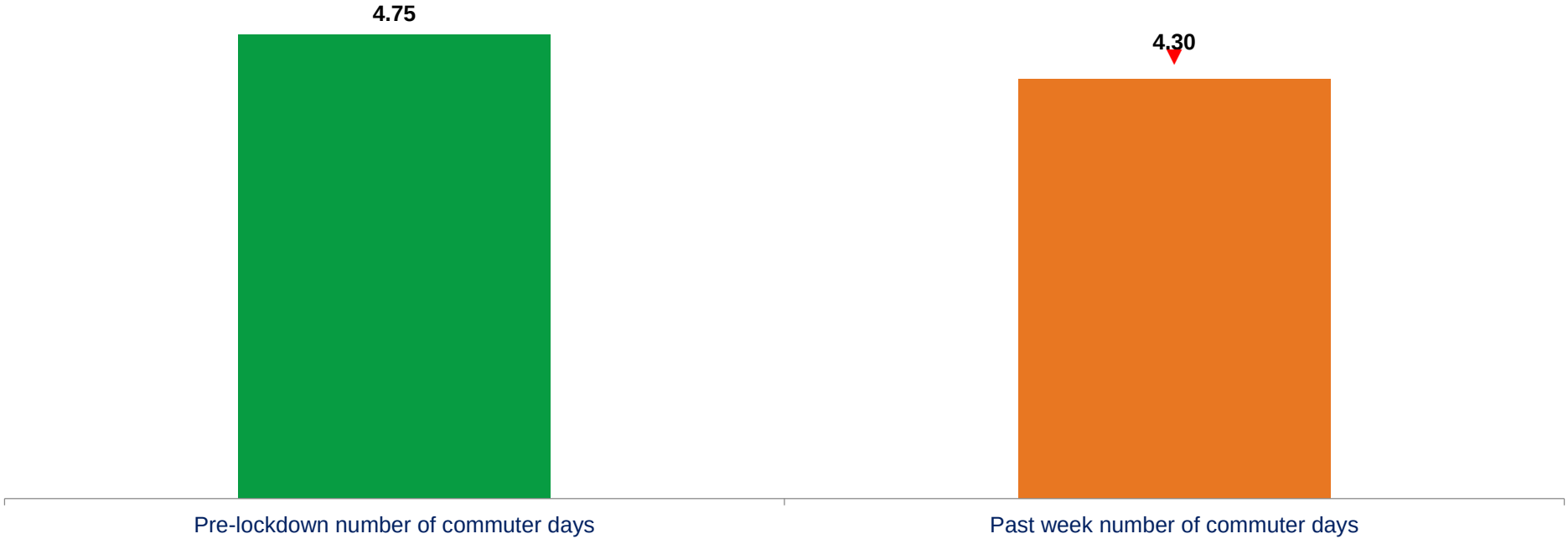
Change in commuter days among those still travelling for work



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

Among those travelling, there is a net decrease of almost half a day of travel

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



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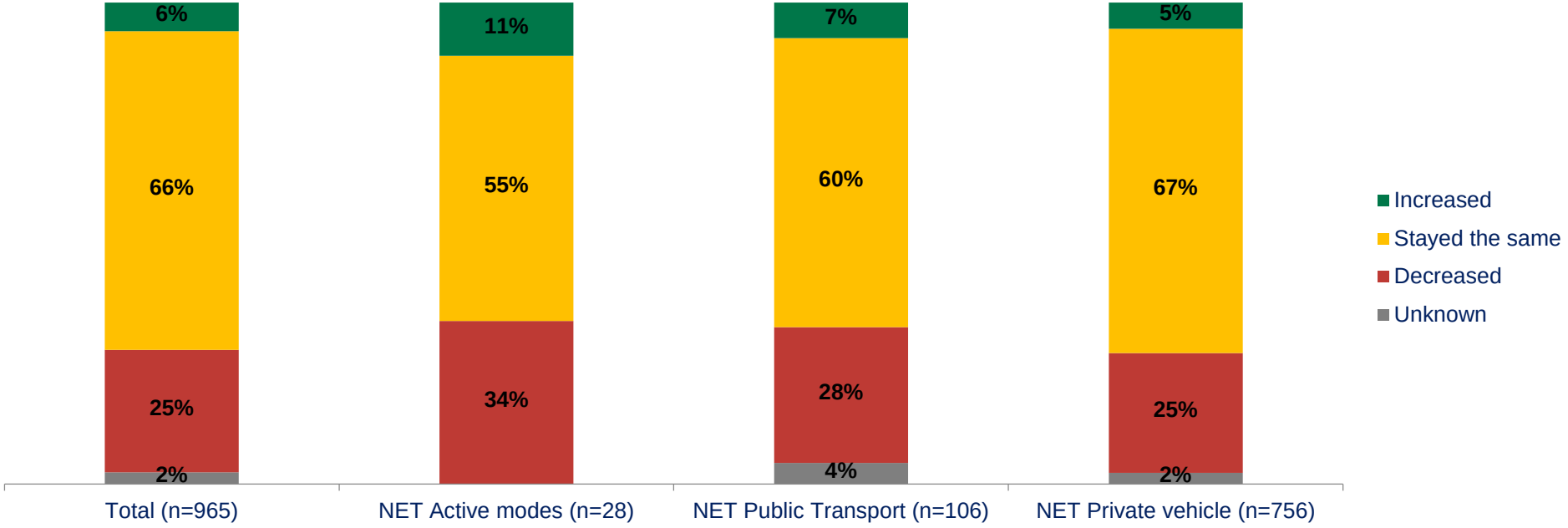
Base: all adults 15+ in New Zealand working away from home (n=1,033)

After two weeks, there isn't a statistically significant difference in the change to reported commuter days by mode

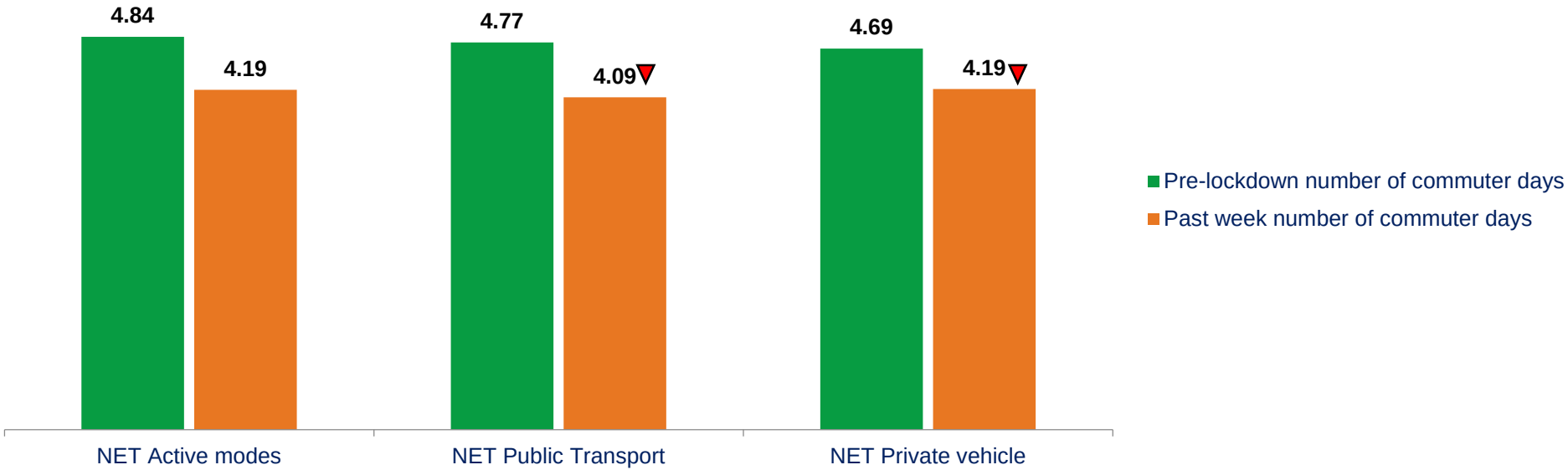
Change in commuter days by mode among those still travelling for work



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

The change in the volume of commuter days is roughly similar among commuters of all modes

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

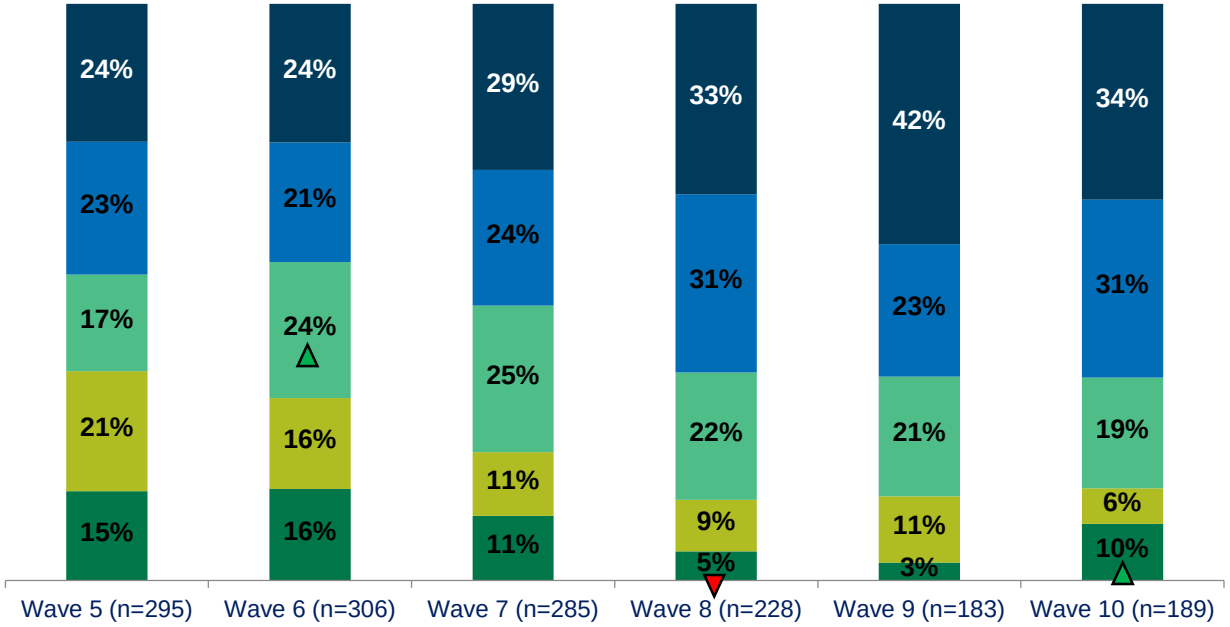


QWORK1B/QWORK2B: In a typical week prior to any public health alert or lockdown, on how many days per week did you tend to travel to a place of work (e.g. office, store, client site)? / Thinking about the past week, on how many days out of the past seven did you travel to a place of work (e.g. office,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

Base: all adults 15+ in New Zealand working away from home who normally travel by active modes (n=28); Public transport (n=106); Private vehicle (n=756)

A third of those still working from home would prefer to continue to do so full-time, with another one in three preferring to work from home most of the week

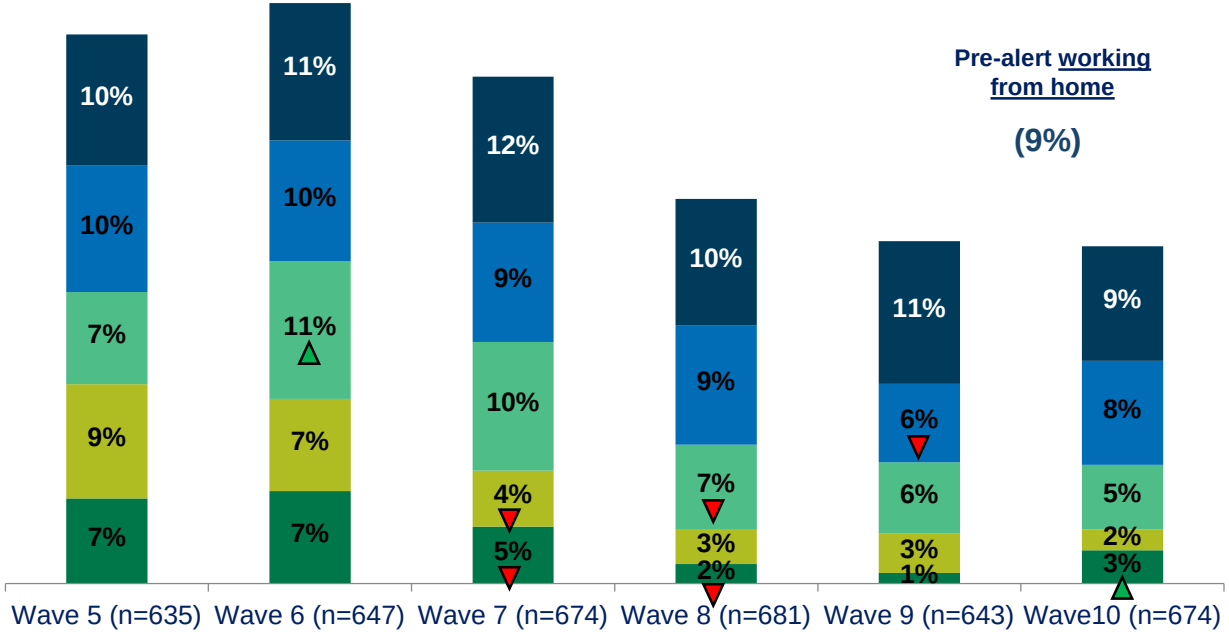
Preferred post-lockdown work site of those still working from home by wave



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

When projected out to the total working population, the nine percent of people who would prefer to continue working from home matches pre-lockdown levels

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 that are working

RICOCHE