

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–14 weekly core report

7 July 2020

Disclaimer

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

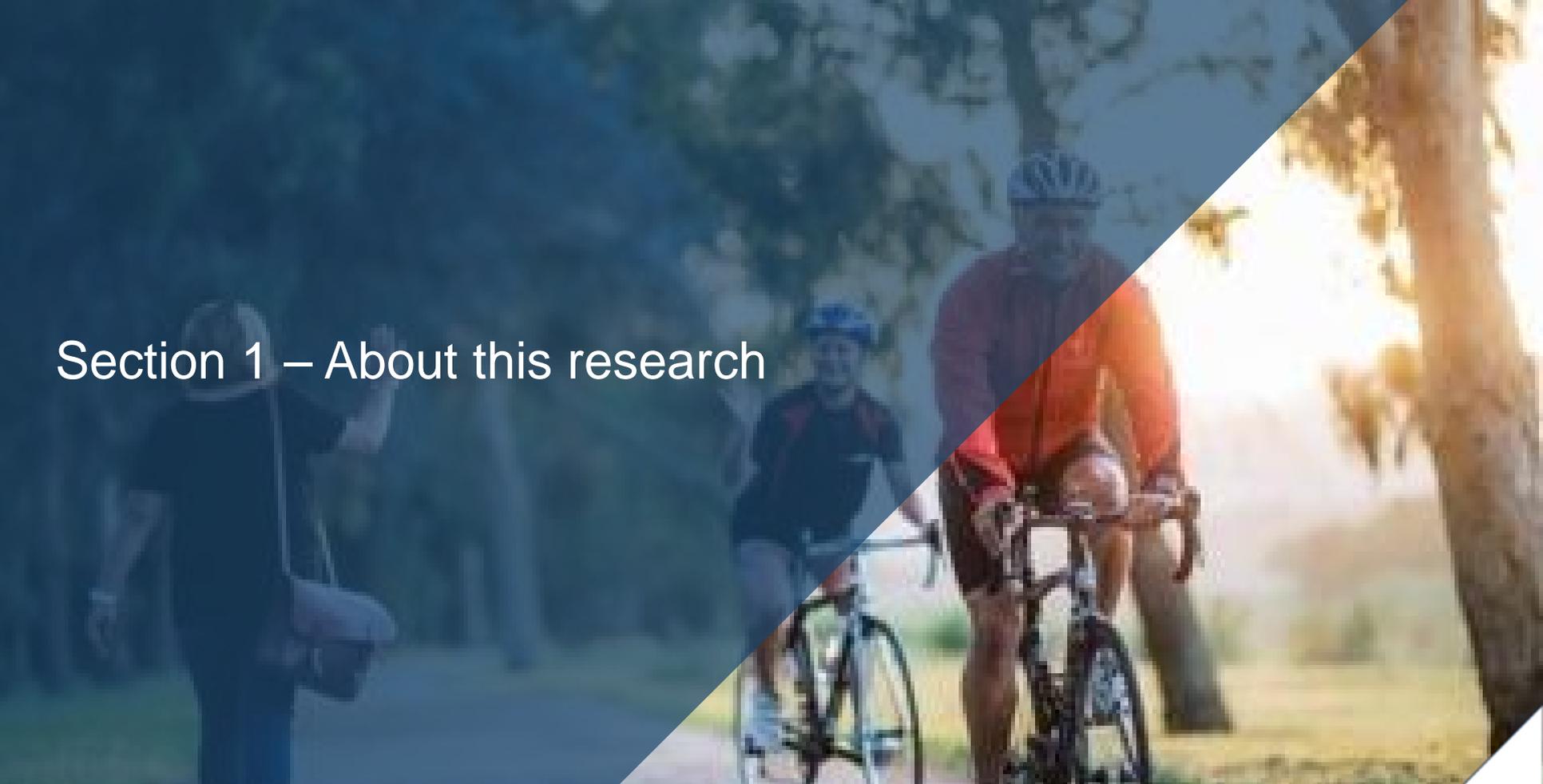
While Waka Kotahi provided investment, the research was undertaken independently, and the resulting findings should not be regarded as being the opinion, responsibility or policy of Waka Kotahi or indeed of any NZ Government agency.

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

Report content

COVID-19 transport impact

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Section 1 – About this research

Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

Overview of research (i)

Research design and outputs

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

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

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

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

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

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

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



Example: Harmony dashboard page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys and domestic travel undertaken and changes

- change is measured since February 2020.

Modal shift patterns and perceptual shifts

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

Measuring attitudinal shifts towards COVID-19

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

Questions to classify into a variety of segments of interest

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

Ad hoc questions of interest

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

Report notes (i)

Key information to note for this report

- This report is based on fourteen waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves, combined sum of waves 5 and 6, combined sum of waves 7, 8, 9 and 10, and combined waves 11, 12, 13, and 14 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 14 report is based on a statistically significant shift of results between waves 1 to 14, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs. combined level 2 alert results vs. combined level 1 alert results to date.
- At a sub-population level, significance testing indicates a statistically significant difference between the sub-population and the base or total population. The total population benchmark is based on the total sample base collected across the first four waves of data.

Wave	Dates of fieldwork	Alert level
1	Friday 3 April to Wednesday 8 April	Alert level 4
2	Thursday 9 April to Tuesday 14 April	
3	Thursday 16 April to Monday 20 April	
4	Thursday 23 April to Sunday 26 April	
5	Thursday 30 April to Sunday 3 May	Alert level 3
6	Thursday 7 May to Sunday 10 May	
7	Thursday 14 May to Sunday 17 May	Alert level 2
8	Thursday 21 May to Sunday 24 May	
9	Thursday 28 May to Monday 1 June	
10	Thursday 4 June to Sunday 7 June	
11	Thursday 11 June to Sunday 14 June	Alert level 1
12	Thursday 18 June to Sunday 21 June	
13	Thursday 25 June to Sunday 28 June	
14	Thursday 9 July to Sunday 12 July	

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 – 14	
		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=5,024	1.38
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=1,302	2.72
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=394	4.94
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=400	4.9
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=774	3.52
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=401	4.89
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=407	4.86
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=1,328	2.69	n=1,346	2.67
Disability, Vulnerability and COVID-19**									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=563	4.13
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=1,094	2.96
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=567	4.12

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

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

Report notes (ii)

Key transport terms and demographic groupings

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

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

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

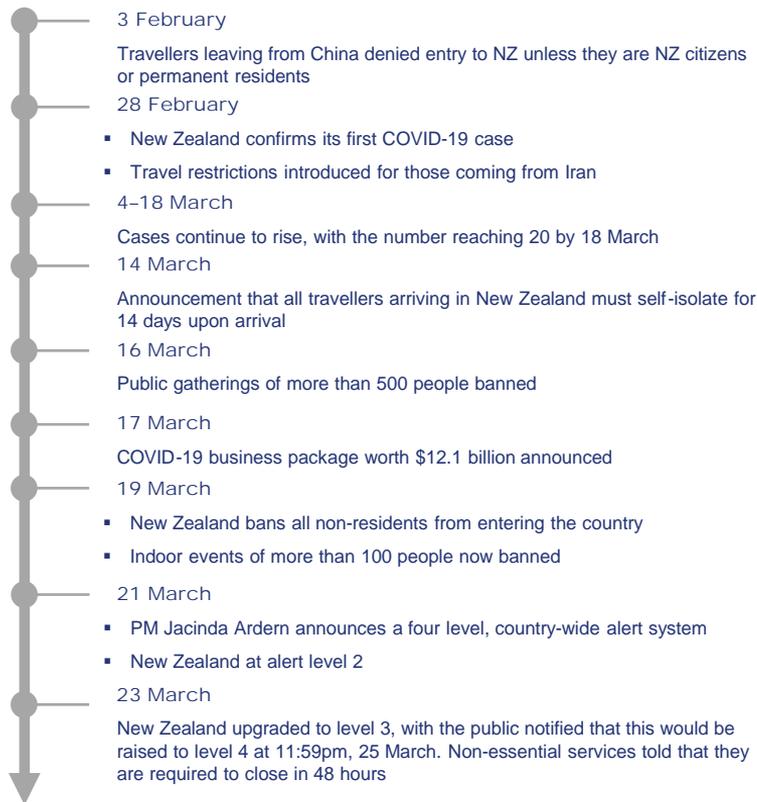
Active modes: refers to walking (of at least 10 mins) and cycling, including e-bikes.

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

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

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

Context: New Zealand COVID-19 timeline



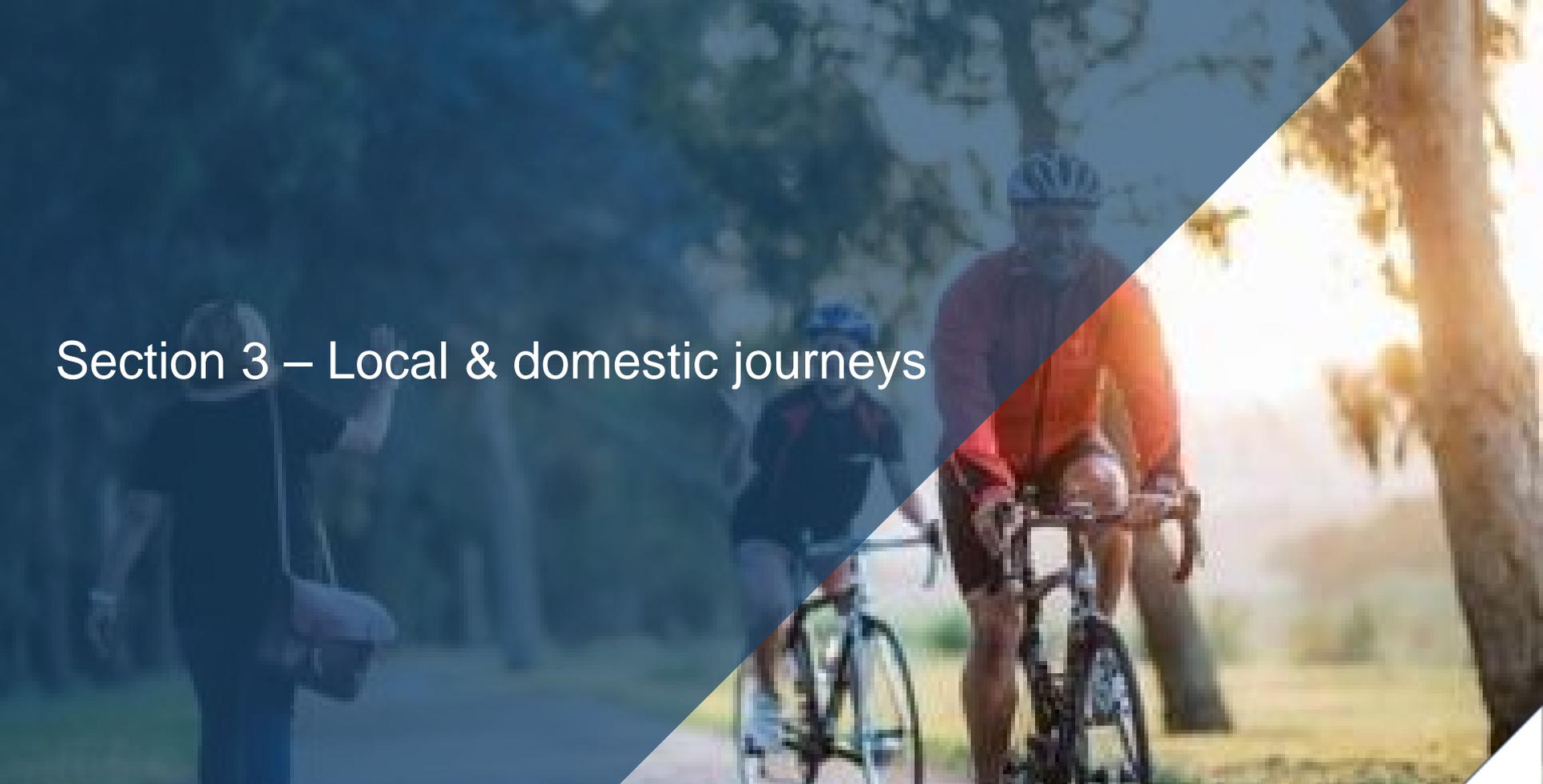


Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–14

Waka Kotahi COVID-19 transport impact tracker

- Wave 14 of fieldwork is the fourth under level 1 conditions. Wave 12 had seen a number of new COVID-19 cases reported, which was accompanied by an increase in the level of concern cited around transmission and infection. This concern has begun to drop off gradually although it is still at a higher level than recorded at the start of level 1.
- Travel activity is continuing to return to normal, with the proportion indicating that they are self-isolating in this wave at the lowest level recorded so far during this research.
- The level 1 increase in [local journeys](#) undertaken has begun to slow, with the proportion commuting to work stalling a little way short of pre-lockdown levels.
- Some [inter-regional domestic journeys](#) are returning to levels seen at the wave 10 peak, primarily driven by a recovery in the proportion visiting friends and family.
- The proportion claiming to use public transport at least once a week has remained stable, with weekly bus usage in particular having stalled short of pre-lockdown levels. **Note that this does not reflect the volume of trips being made, just the proportion travelling at least once in a seven-day period.**
 - The most frequently cited trigger for returning to public transport is the return of need through re-opening workplaces and places of education.
 - In wave 13, there has been a marked decrease in the proportion saying that they will return to public transport once driving becomes less convenient.
 - On the whole, it appears that a key factor in returning public transport usage to normal will be the increase in the number of normal day-to-day journeys that people need to take.
- When it comes to [domestic tourism](#), the projected NETT growth in the coming year is trending more negatively for all journey types, reversing positive movement in work and conference related projections in wave 13.
- Despite the decrease in stated overall levels of concern about COVID-19 transmission, it continues to be as much of a barrier to increased tourism travel as it was in wave 12, indicating that the impact of new cases on transportation could linger longer.
- For the first time in this survey, New Zealanders were asked their intentions with regards to future international travel following a hypothetical lifting of travel restrictions in the next 12 months. Journeys to Australia and the Pacific would be more common, more immediate and more focused on leisure and tourism than travel further afield were these options available to New Zealanders today.
- As a greater share of the workforce continues to return to normal places of work, it is important to understand how attitudinal drivers to working from home may persist beyond the lockdown period and how these attitudes compare between those who continue to work from home, those who no longer do, and those who have never done so, but were able.
 - Increased opportunity appears to be pervasive across all groups, with similar proportions reporting changes in how their workplace operates to allow people to work from home and whilst capability (set-up comfortable to work from home) is certainly stronger among those still working from home, half of those who did not work from home say they have the capability to do so.
 - When it comes to motivation, a desire for flexibility is not necessarily the same as a desire to take up the offer. A large proportion of those who never worked from home, but could, would like this flexibility, even if they're likely to prefer that it only be a 'last resort'.
- It is unclear whether COVID-19 has had a sizable and tangible impact on vehicle purchasing. While many say that they have delayed or foregone a planned purchase, it is clear that people have continued to buy new or replacement vehicles during the last three-four months, and intention to purchase has also recovered. Overall, it does not appear that the market has been affected by a shift from planned EV or hybrid purchase to traditional diesel or petrol vehicles instead.

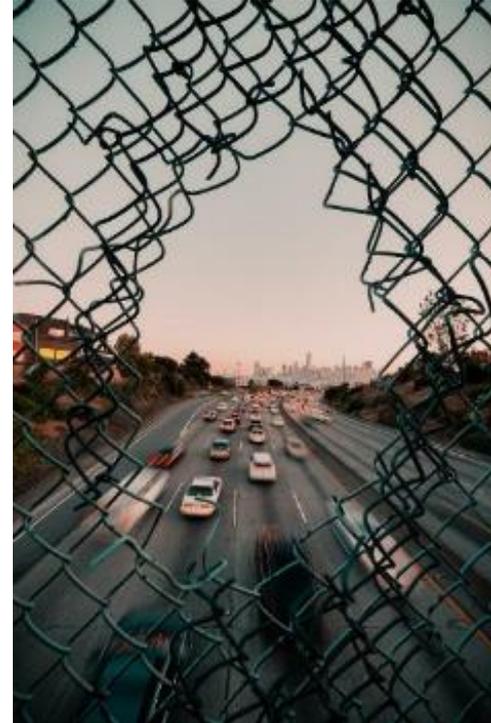
A photograph showing a person walking on the left and two cyclists on the right, all on a path. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is dark blue, and the lower-right portion is a lighter, natural color. The text 'Section 3 – Local & domestic journeys' is overlaid in white on the dark blue area.

Section 3 – Local & domestic journeys

Key findings – local and domestic journeys and modes

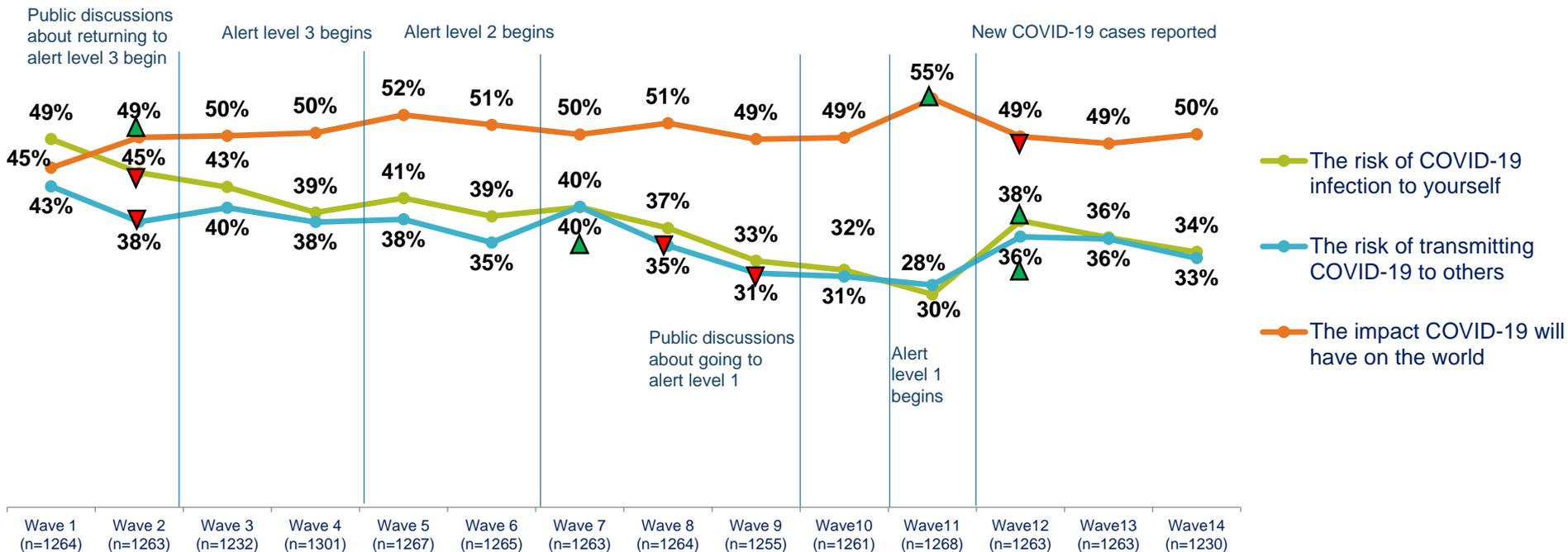
Waka Kotahi objective – how is travel changing?

- 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 and domestic journeys during this time and weekly mode usage.
- As people become familiar with the idea of new COVID-19 cases being caught at the border, concerns about transmission are beginning to return to levels seen before the announcement of new cases.
- Gradually, people are beginning to travel as they normally would. At this point, only one in six are wholly or partially self-isolating.
- Local journeys appear to have reached a plateau in terms of recovery, close to their pre-lockdown levels, while variability continues for longer domestic journeys, particularly visits to friends and family.



Concerns about COVID-19 have gradually dropped off following a spike in wave 12 with the announcement of new cases

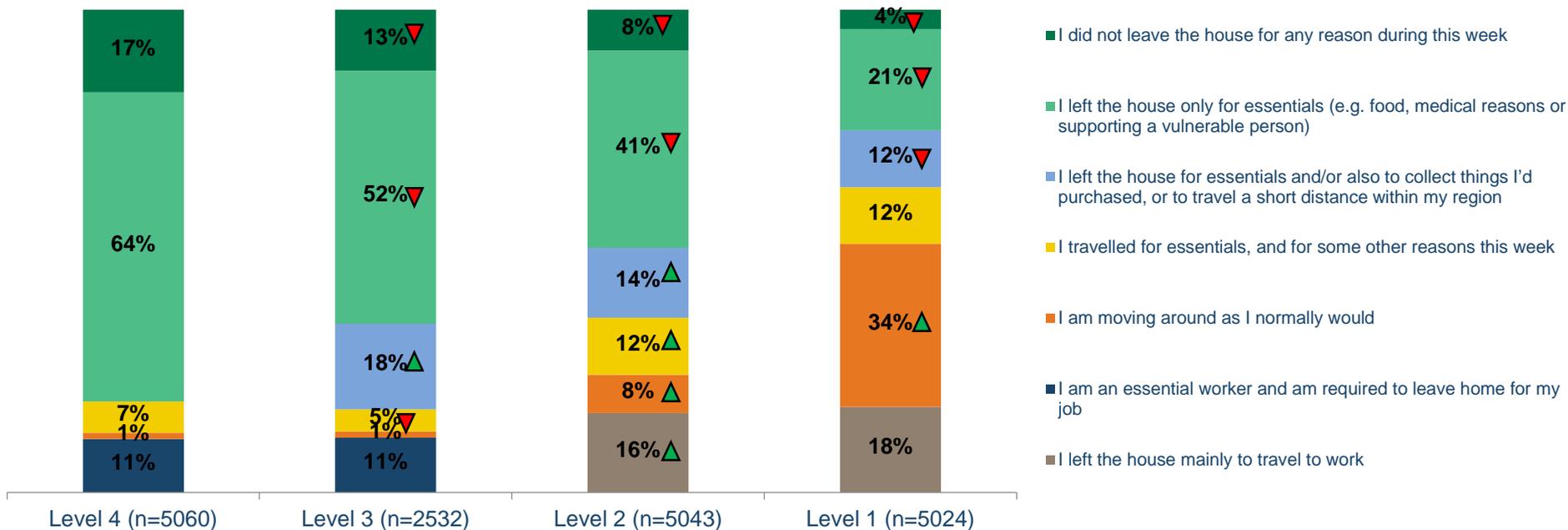
COVID-19 concerns (NETT all concerned)



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

More than a third of those interviewed in level 1 say they're moving around much as they normally would

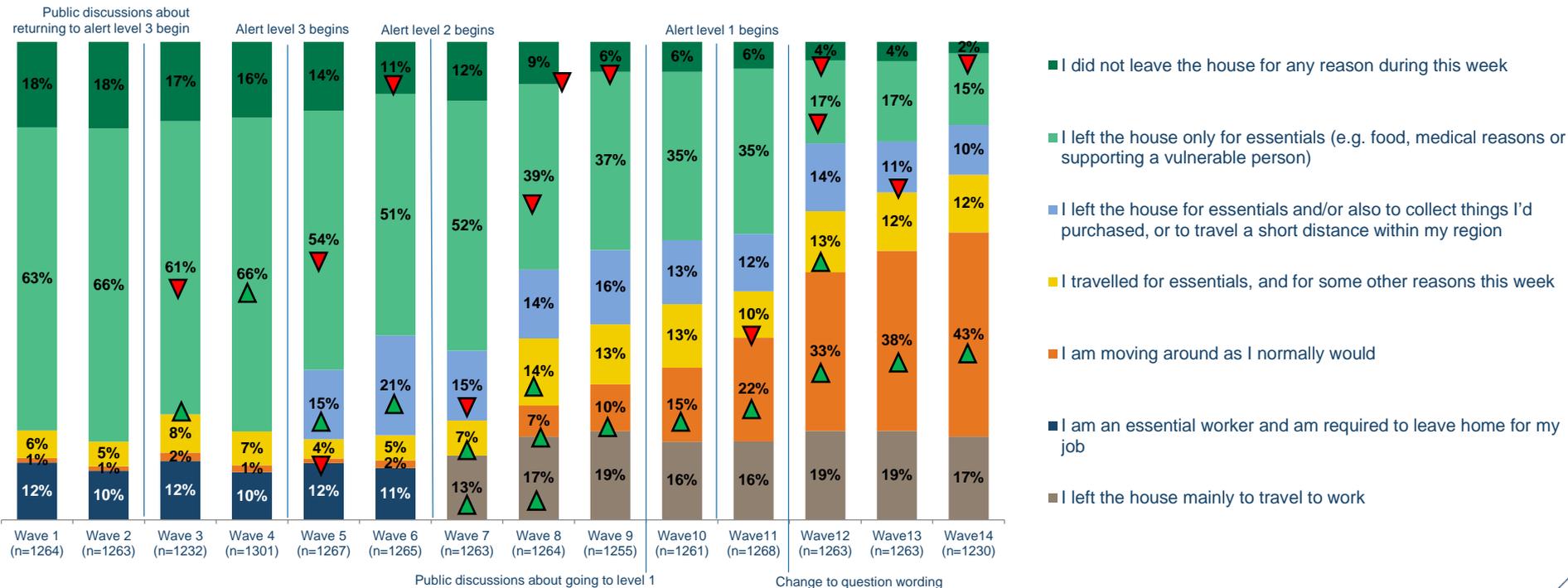
Reported activity and movement during the past seven days by alert level, excludes exercise



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

The proportion moving around as normal has increased significantly in every wave of level 1, self-isolating is now at the lowest level recorded so far

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



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

Base: all adults 15+ in New Zealand



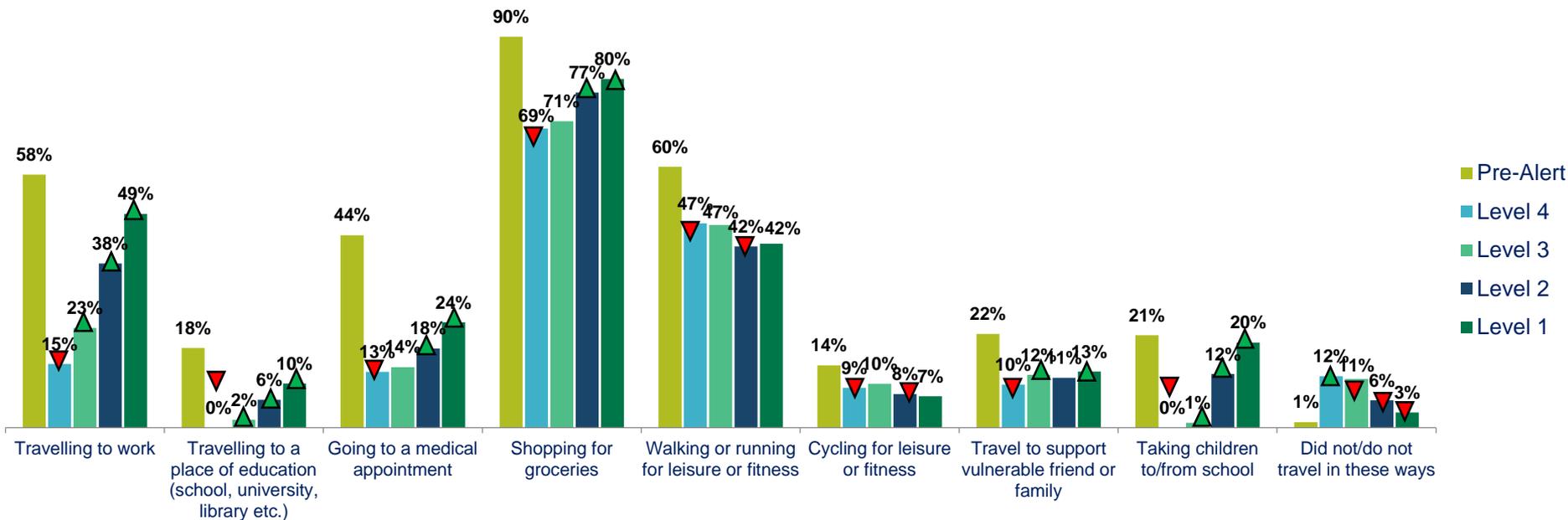
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Most journey activities continue to grow, with exercise and leisure continuing to be the activities that are not recovering

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



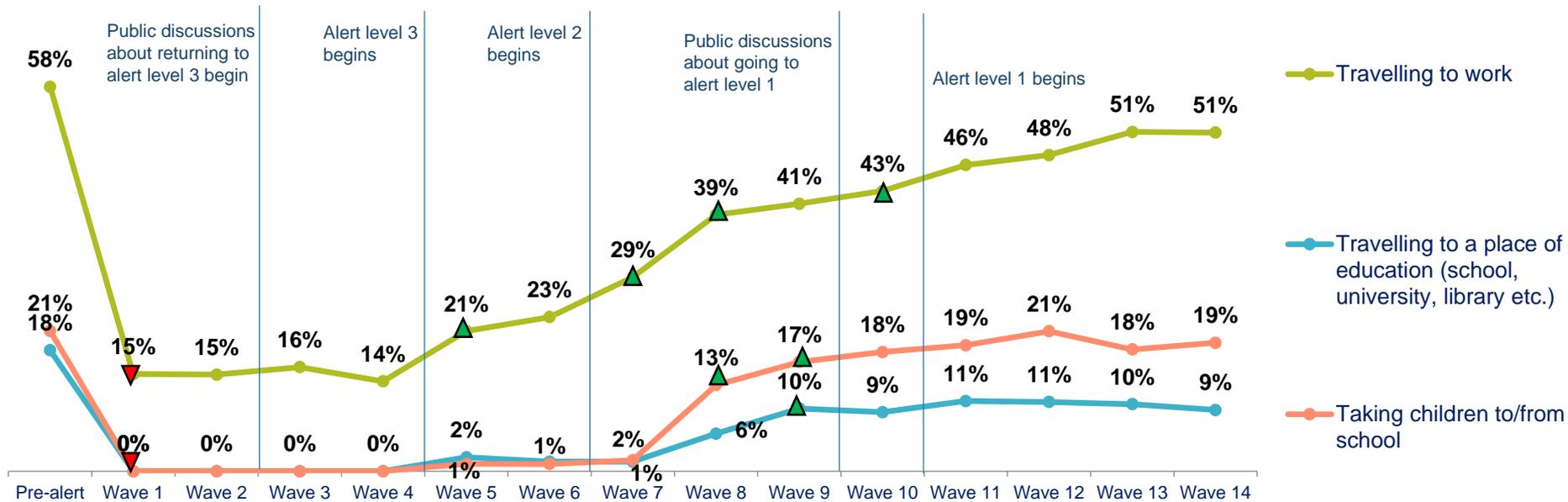
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

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



Most of the major daily journeys have returned to close to normal, although education trips may not fully recover until the new semester starts

Reported activity and movement during the past seven days by wave



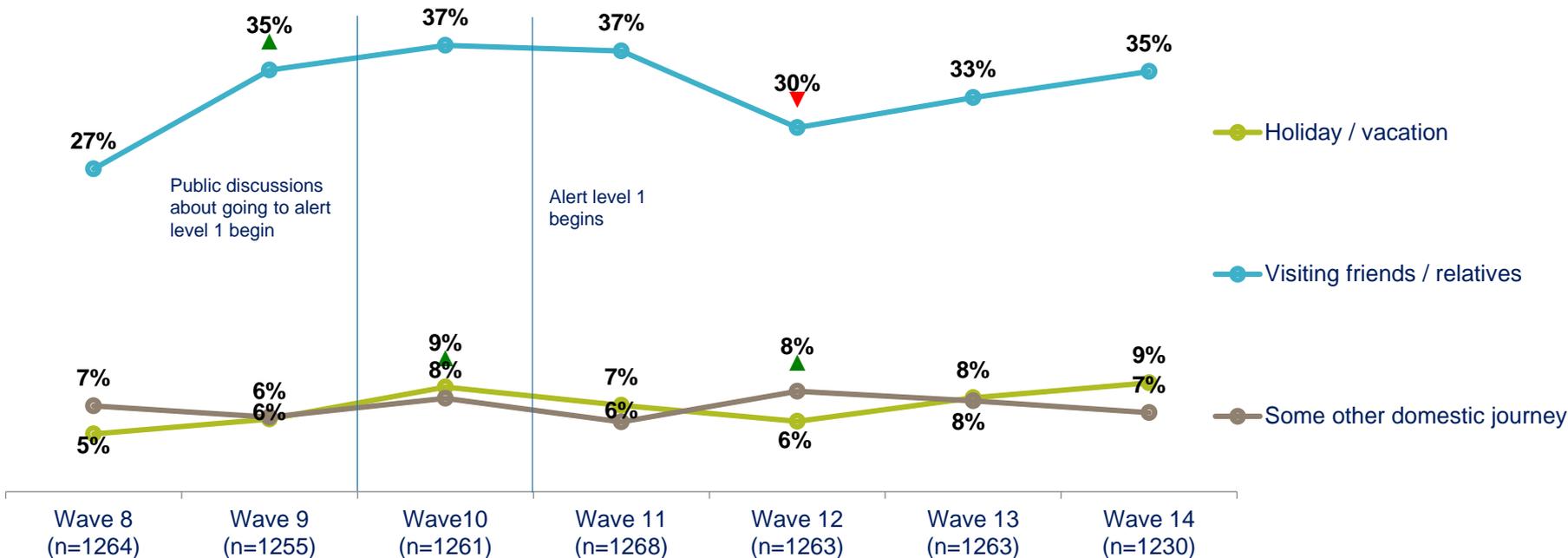
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)?/And which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263), wave 13 (n=1,263)



The proportion visiting friends and relatives has started to recover towards levels seen before the sudden drop off in wave 12

Domestic journeys in the past seven days by wave



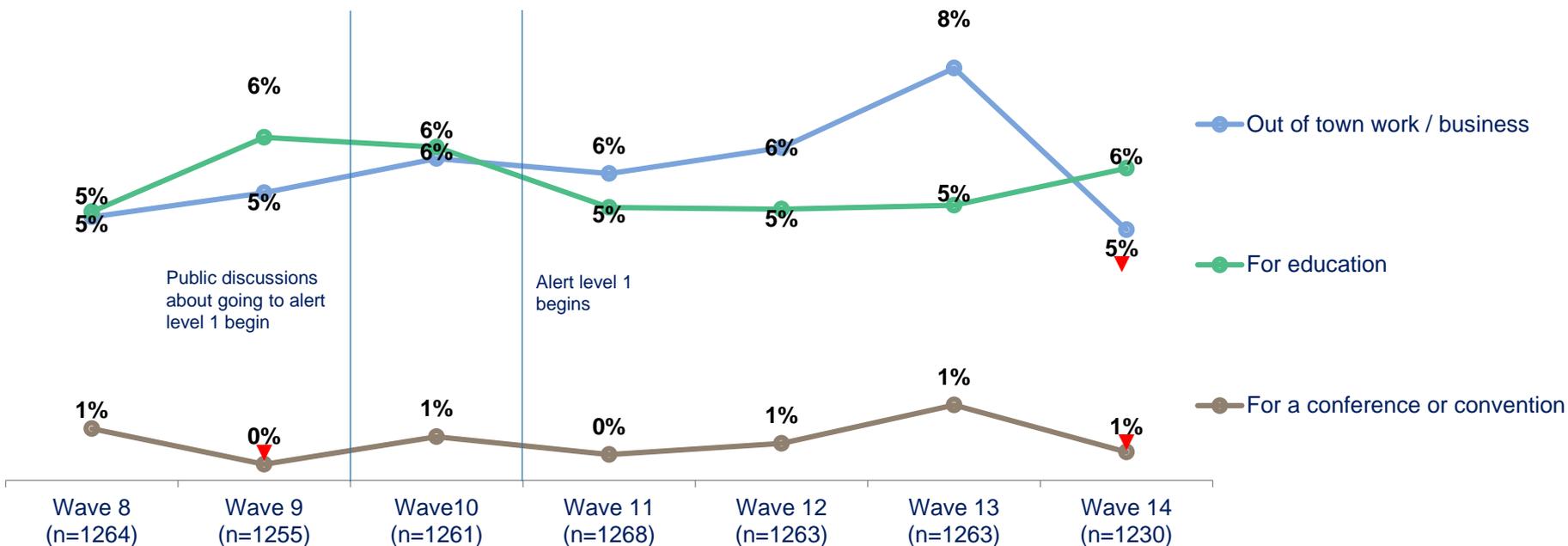
QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand; wave 8 (n= 1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263), wave 13 (n=1,263), wave 14 (n=1,230)



Out of town work trips have dropped off significantly following a spike in wave 13

Domestic journeys in the past seven days by wave



Q.JOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand; wave 8 (n= 1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263), wave 13 (n=1,263), wave 14 (n=1,230)



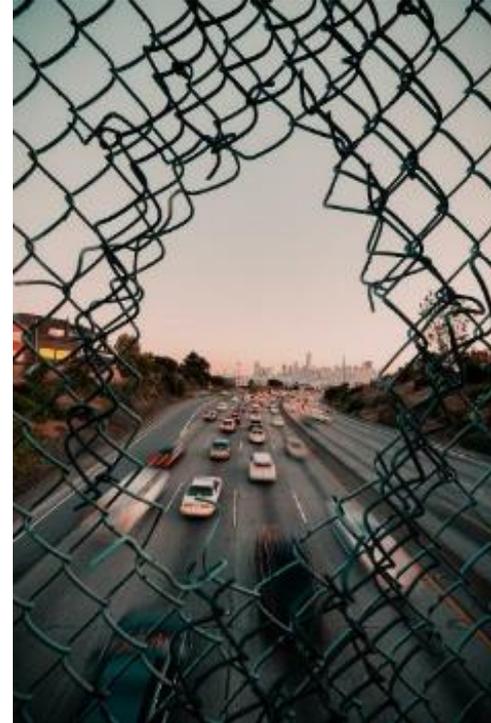


Section 4 – Public transport modes and mode-switching

Key findings – public transport and mode-switching

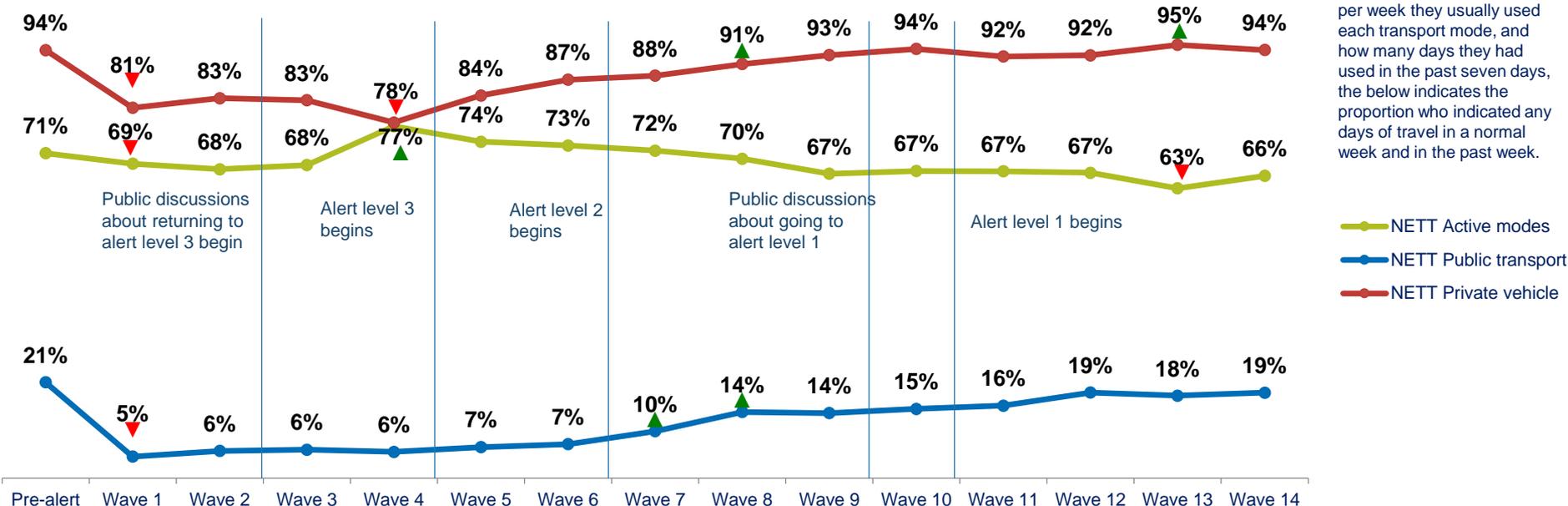
Waka Kotahi objective – how and why is travel changing?

- Within the context of public transport services returning to normal capacities it is important to track and understand the rates at which users return to public transport, the drivers of returning usage and the barriers that may still keep some passengers away.
- Growth in mode use has slowed, with the number of weekly bus and train users now close to pre-lockdown levels, but not quite fully recovered.
- High consideration levels show that most people have access to diverse ranges of travel modes, but the fact that this doesn't translate into weekly usage may mean that many of those who would consider using buses, trains or ferries have not found or met the criteria that would lead them to return to the service.
- The potential cause of this gap between consideration and use is evidenced by the fact that the most cited 'trigger' for returning to public transport among those who have decreased usage is the return of work or educational trip needs. This exists as a physical barrier to return, rather than a perceptual one as these 'lost' public transport passengers are expressing a diminished or lack of need to use the services.
- Of the perceptual triggers to return, the larger theme is the removal of COVID-19 alert levels, with a drop off this week in the proportion citing the return of driving or cycling barriers, which had peaked in wave 13.
- This was chiefly driven by a 10 point decrease in the proportion citing the return of road congestion as a trigger for returning to public transport, but all driving related triggers declined as reasons for returning to public transport this week.



Public transport usage hasn't varied significantly during level 1 interviewing

Changes in mode usage by wave

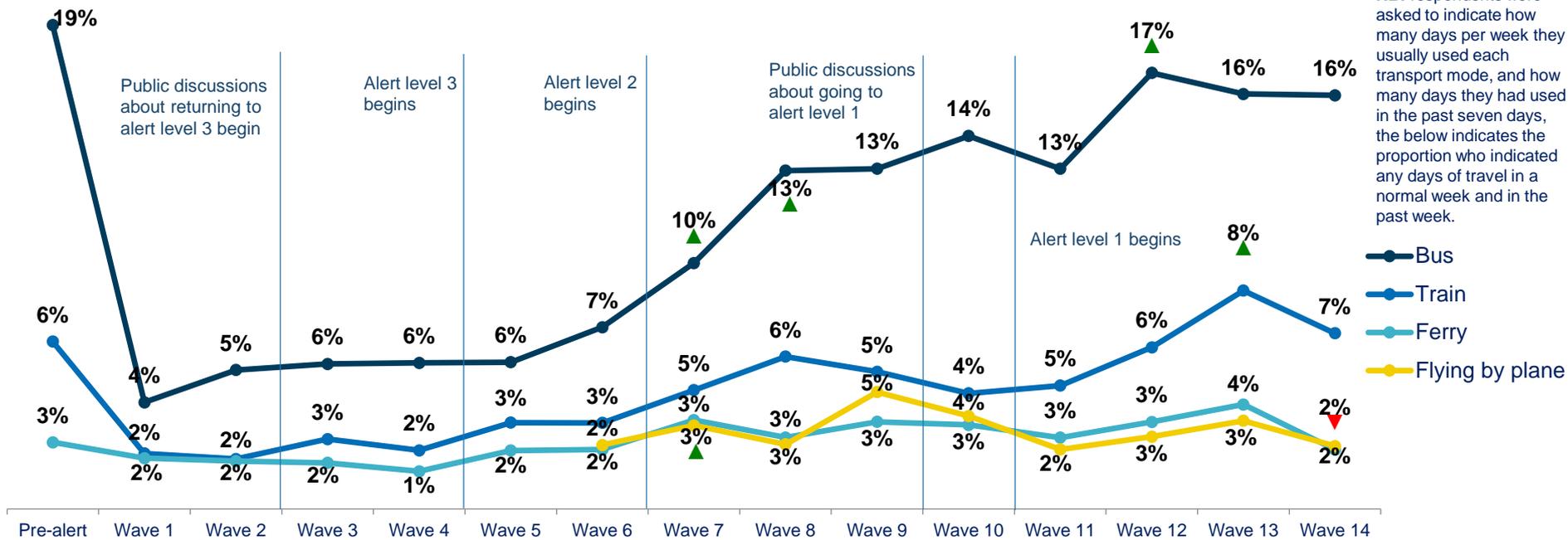


NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.

QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a *normal* week (e.g. in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261); wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230)

Bus and trains appear to have returned to a stable level of weekly users, close to pre-lockdown levels

Changes in mode usage by wave



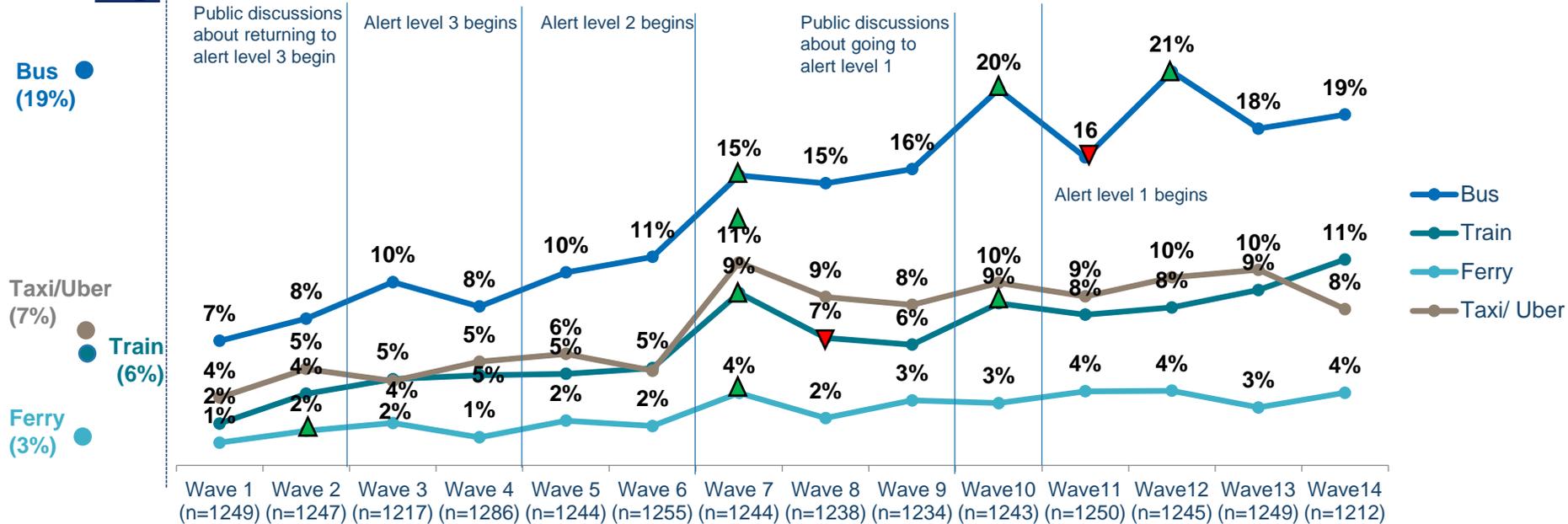
QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a *normal* week (e.g. in February this year)?/ And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230)



Train consideration continues to be greater than current or pre-alert levels of usage, but this has not translated into an equivalent volume of weekly users

Mode consideration: coming week by wave

Pre-alert usage



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

Base: all adults 15+ in New Zealand who normally travel; Wave 1 (n=1,249); Wave 2 (n=1,247); wave 3 (n=1,217); wave 4 (n=1,286), wave 5 (n=1,244), wave 6 (n=1,255), wave 7 (n=1,244), wave 8 (n=1,238), wave 9 (n=1,234), wave 10 (n=1,243), wave 11 (n=1,250), wave 12 (n=1,245), wave 13 (n=1,249)



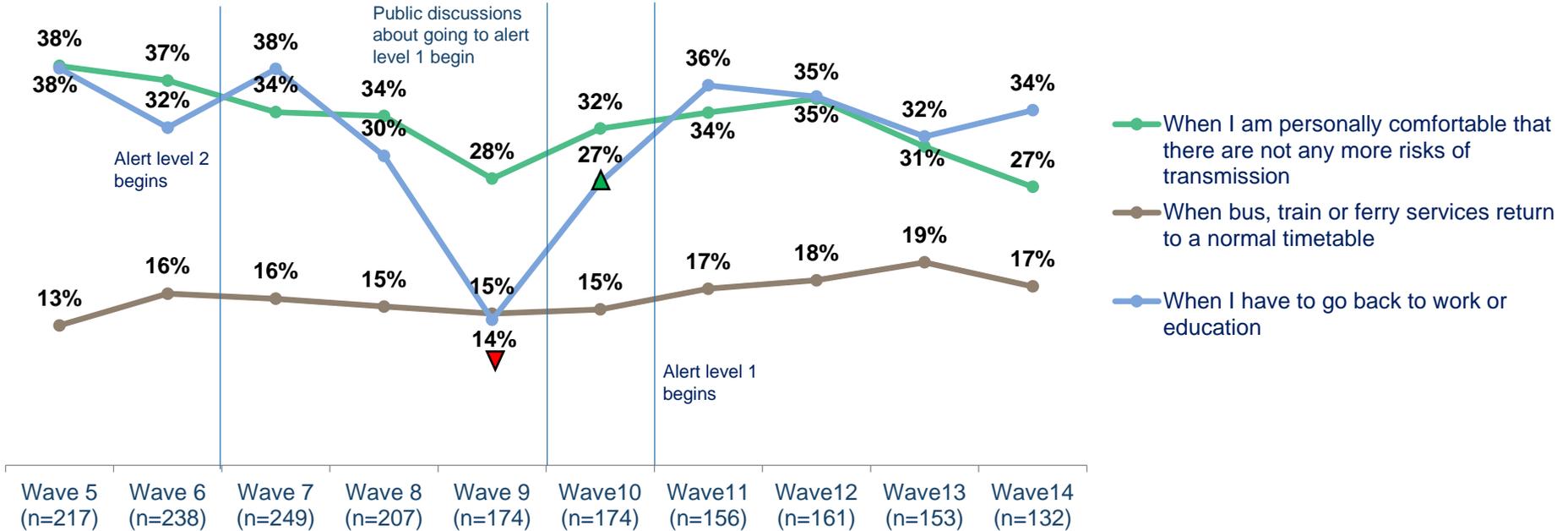
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

More than a third are citing a return to work or education as a reason to return to public transport, currently the most cited individual trigger for returning

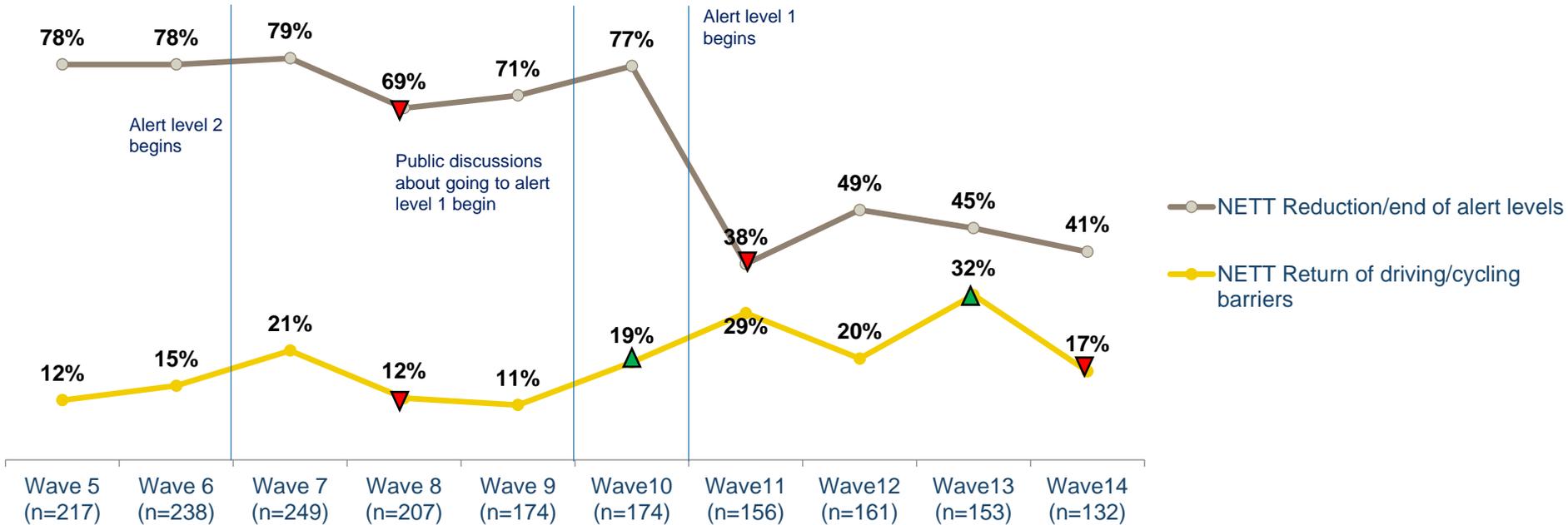
Triggers for returning to public transport usage in the future



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

Following a significant increase in wave 13, the proportion citing a return of driving barriers as a trigger for return has dropped off

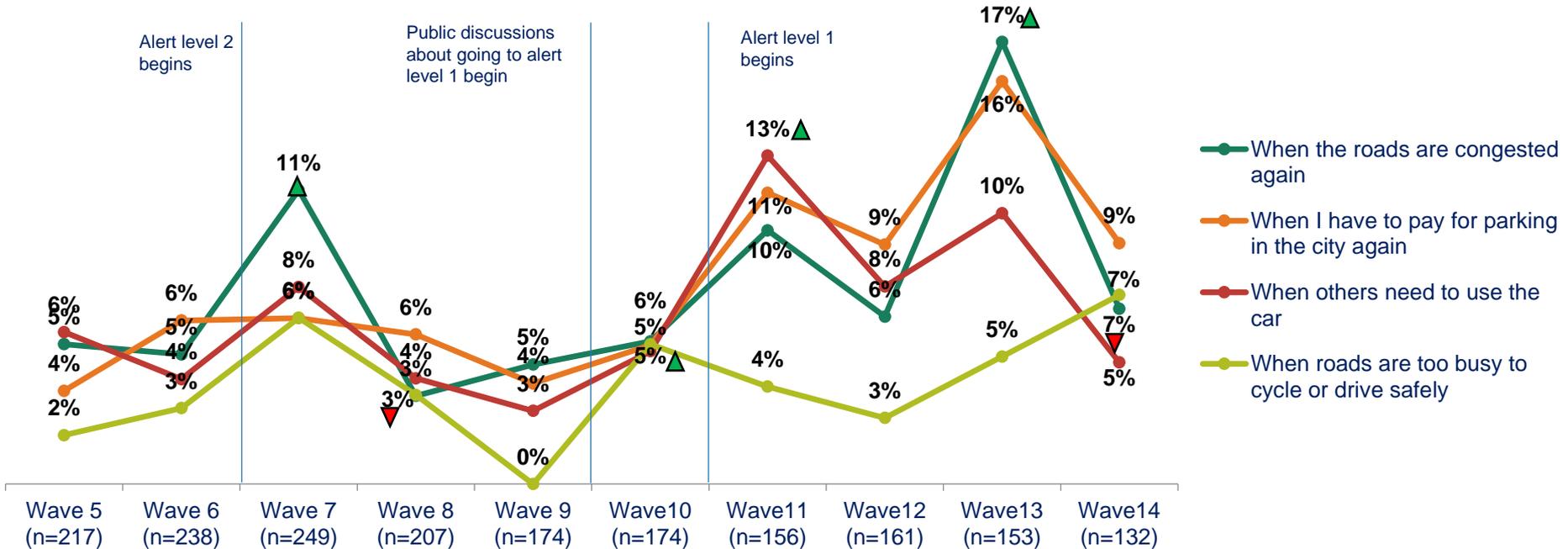
Triggers for returning to public transport usage in the future



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

The return of traffic and parking charges have both dropped most significantly from wave 13

Triggers for returning to public transport usage in the future



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

The background image shows a person in a dark jacket and hat walking on the left, and two cyclists on the right. One cyclist is in a red jacket and the other is in a dark jacket. They are on a paved path with trees in the background. A diagonal blue line separates the dark blue left side from the lighter right side.

Section 5 – Future domestic tourism

Key findings – future domestic tourism

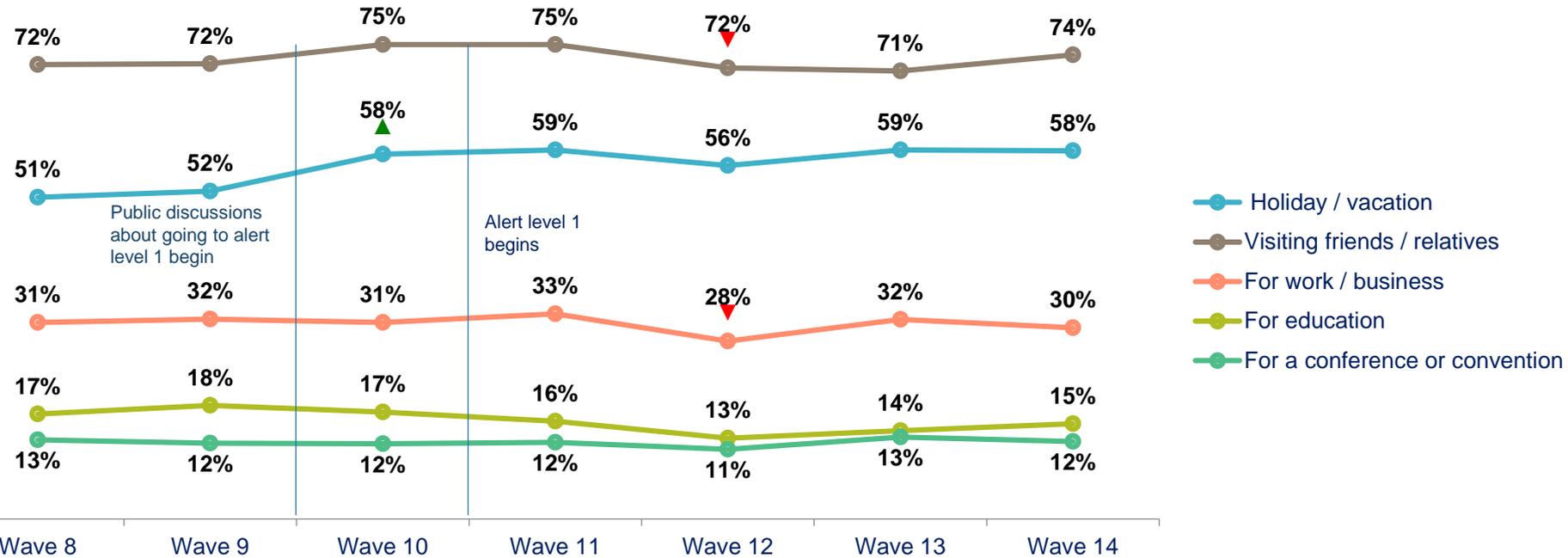
Waka Kotahi objective – how will domestic tourism change going forward?

- 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.
- In wave 13, there was a positive movement in the NET projected travel for work, conferences and education for the first time, but this has quickly reversed in wave 14.
- The NET projected growth in visits to friends and family continues to decrease further from the peak seen in wave 11.
- For those planning to travel less overall, the resurgence of COVID-19 concerns continue to be heavily cited as barriers, despite the fact that the overall level of concern in the population is beginning to decline.
- Although the sense of national worry may have begun to subside, as evidenced by the declining proportion saying that they are concerned about transmission, the impact on transportation and domestic tourism behaviour may lag in its recovery.



There hasn't been a great deal of variation in the proportion saying that they are likely to travel in each of the tested ways

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

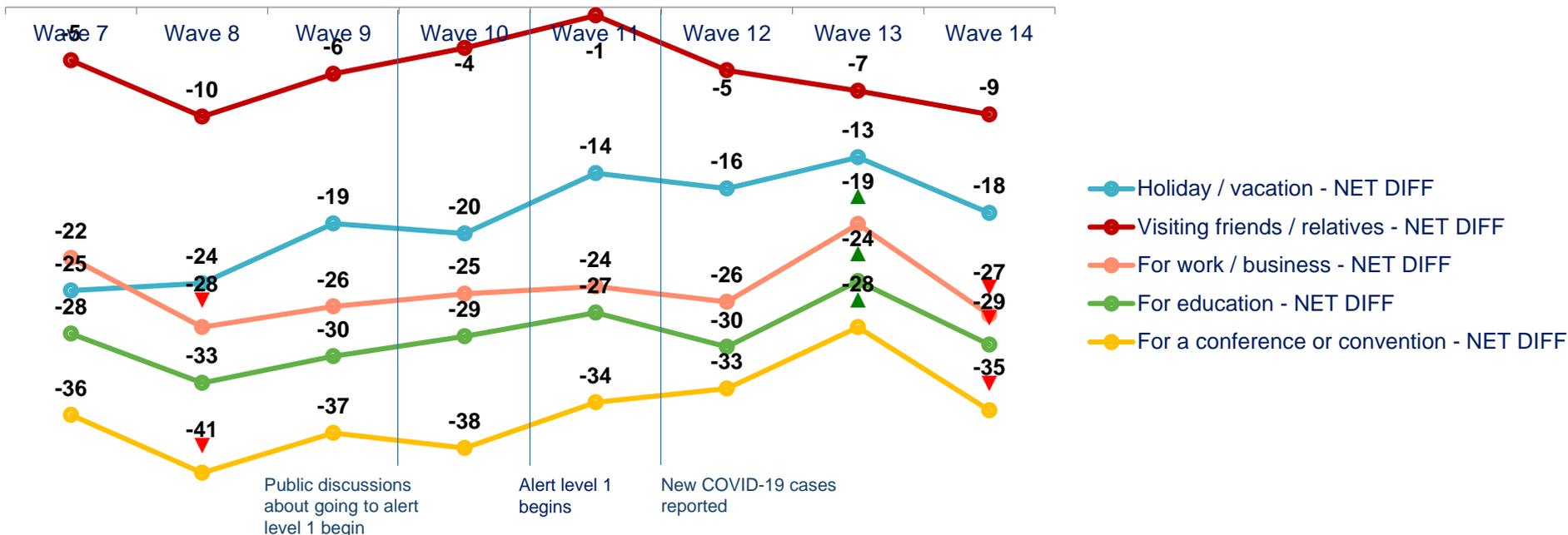


FDT1. How likely are you to make following types of domestic journeys in the next six months?
 Base: all adults 15+ in New Zealand



After a week of positive NET movement, the projected growth of all types of domestic tourism journey has declined in wave 14

Intention to travel domestically



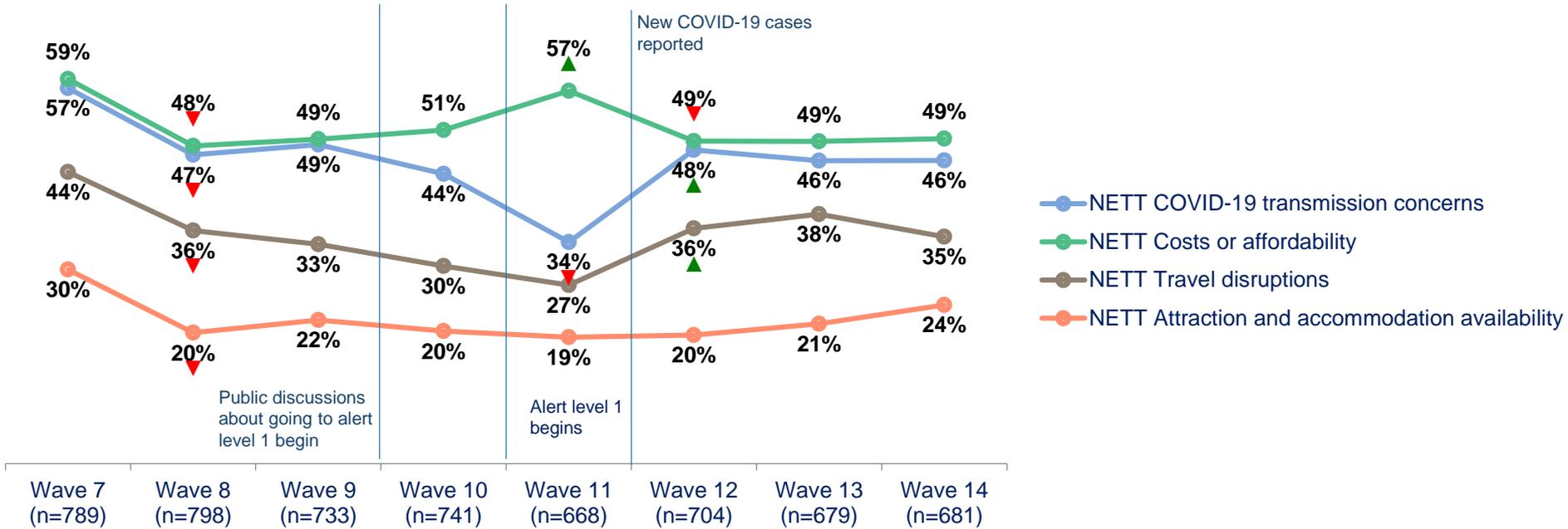
FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand



Concerns about COVID-19 continue to be major reasons for planning less travel in the next six months, as do anticipated related travel disruptions

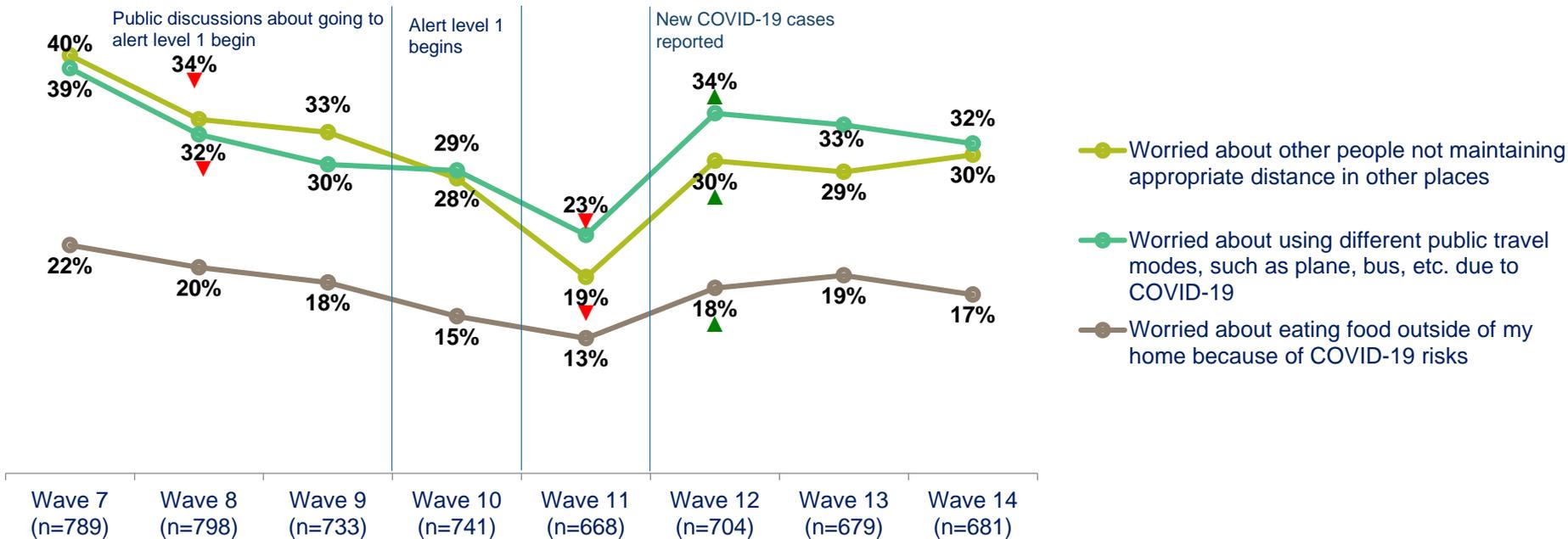
Reasons for travelling less



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

There hasn't been any significant drop off in the proportion citing concerns about distancing, transmissions during transportation or eating outside of the home

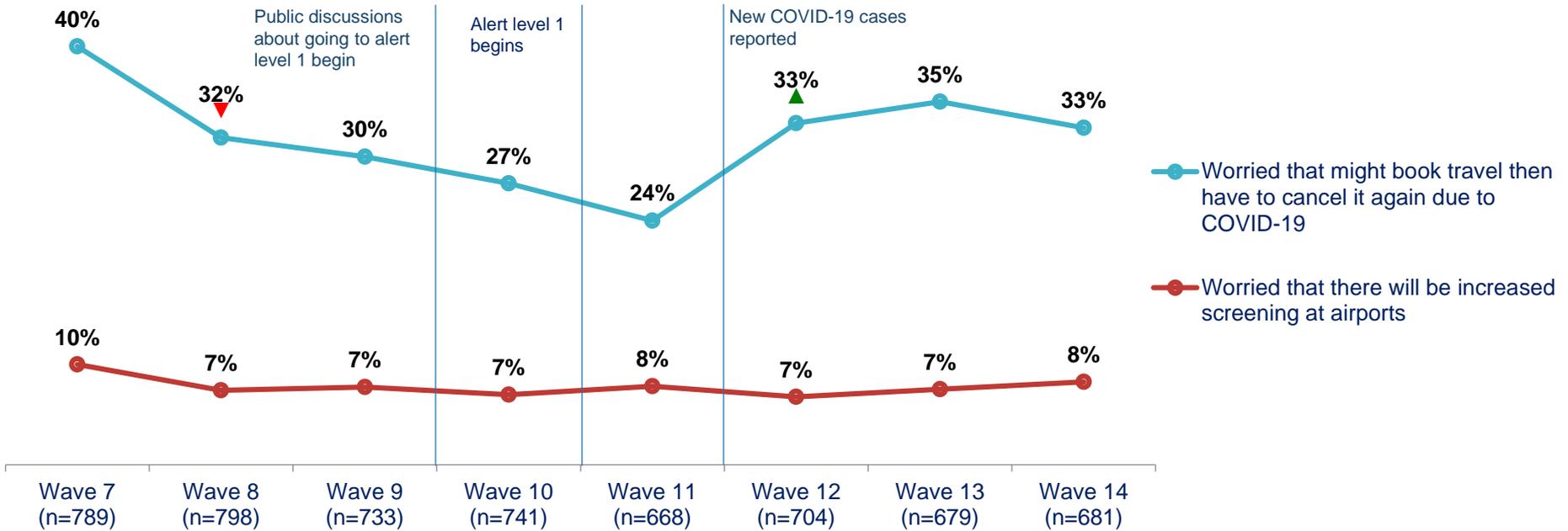
Reasons for travelling less – COVID concerns



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

The proportion worried about travel disruptions is at a similar level to that seen in wave 12

Reasons for travelling less – travel disruptions



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





Section 6 – Future international tourism

Key findings – future international tourism

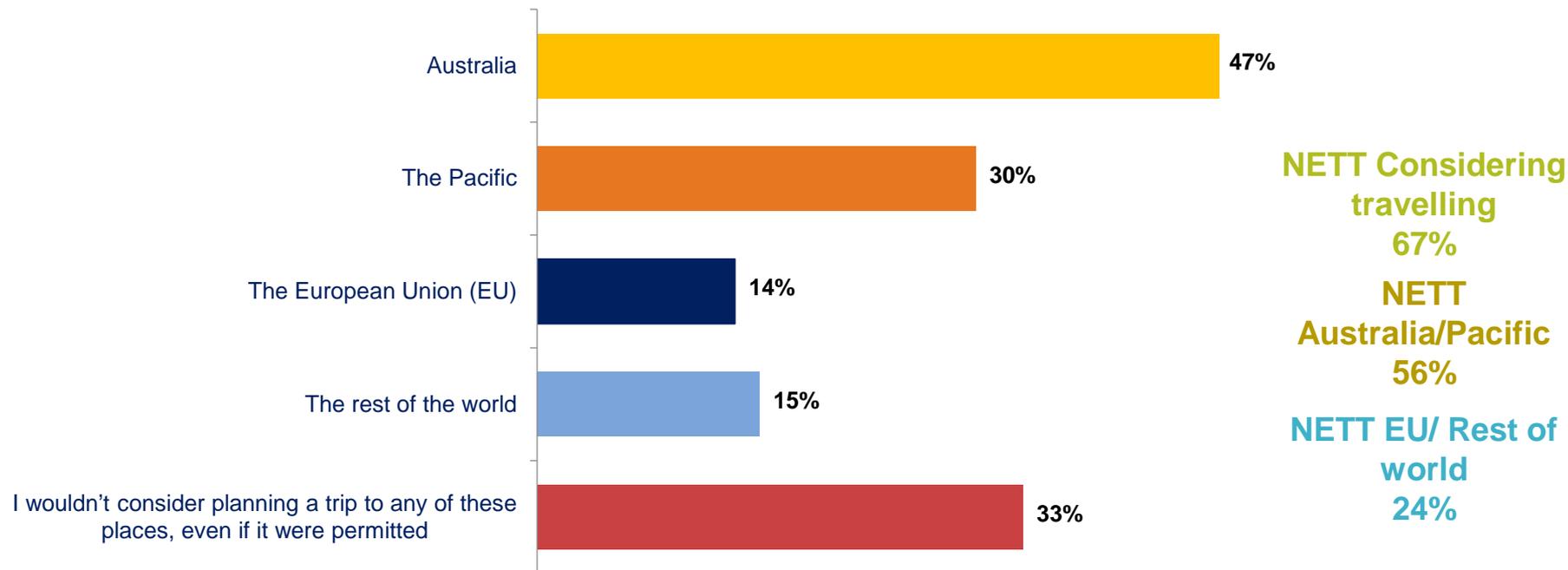
Waka Kotahi objective – changes to travel

- With New Zealand now in alert level 1 and discussions taking place about opening international ‘bubbles’ to allow international travel in and out of New Zealand, it’s important to understand how fast and eager the uptake will be once these options become available.
- People are generally more open to planning international travel to Australia, with nearly half saying that they would do and the majority of these anticipating a leisure journey.
- Three in 10 would consider planning a trip to the Pacific and the distribution of trip types is similar here to Australia, with the majority of trips being for leisure.
- There appears to be less appetite for travel further afield, but of those considering a trip, a greater proportion are thinking about work and other non-leisure travel.
- Looking at the population as a whole, around 3% would plan a trip to Australia within a month of borders being opened, with more than a third doing so within the year.



Nearly half would consider booking travel to Australia if it were possible to do so within the next 12 months, although a third would not plan any international travel

Proportion who would consider travelling to each location in the next 12 months

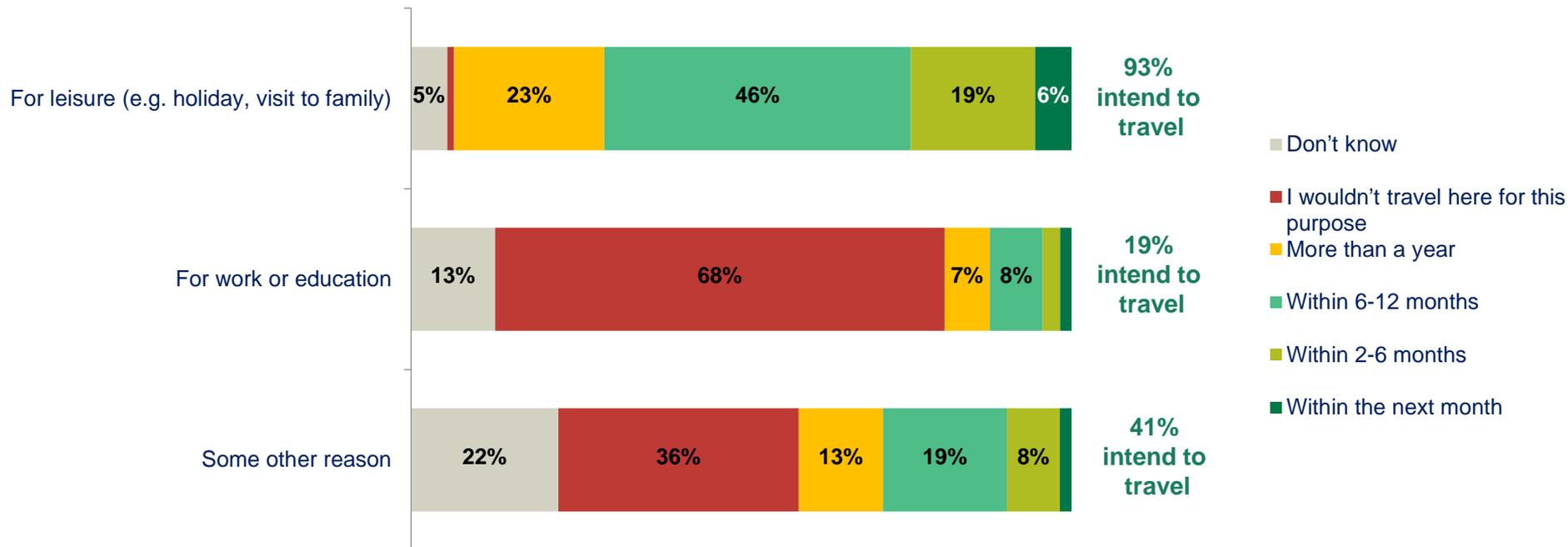


FIT1: Which, if any of the following places would you personally consider travelling to in the next 12 months, either for work, education or leisure purposes such as a holiday?

Base: all adults 15+ in New Zealand in wave 14 (n=1,230)

The majority of those intending to travel to Australia are planning to do so for leisure purposes

Proportion who would consider travelling to Australia for each purpose in the next 12 months

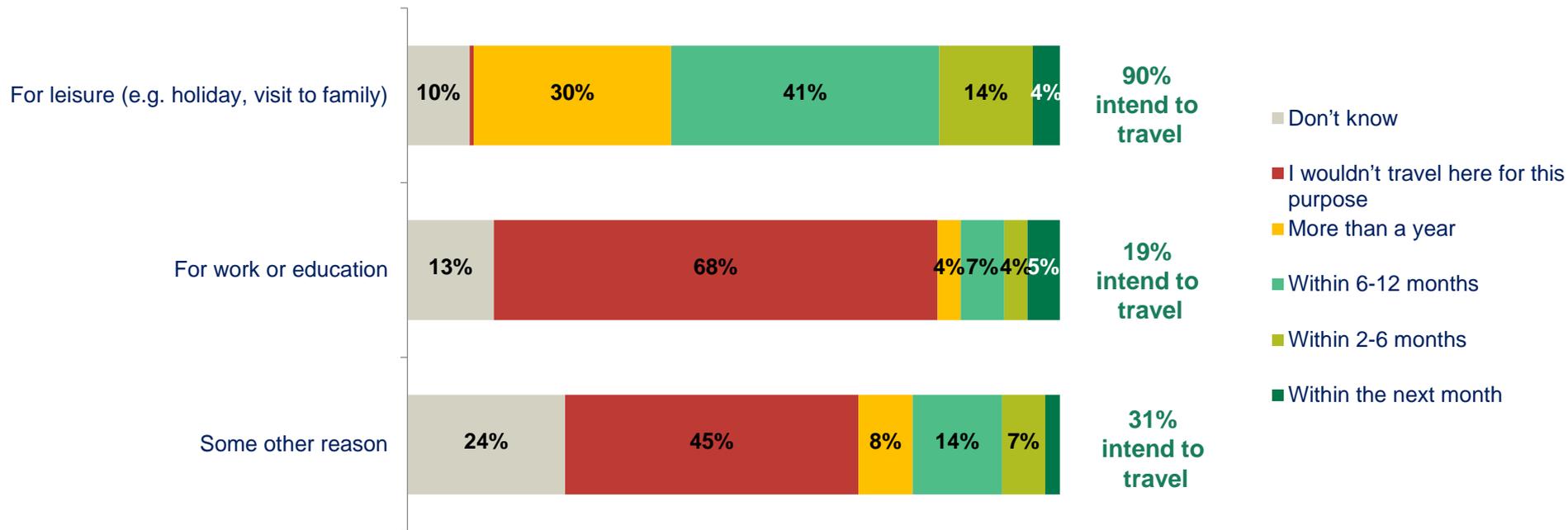


FIT1A: If this sort of travel were permitted today, how soon do you think you would plan to travel to Australia for each purpose?

Base: all adults 15+ in New Zealand in wave 14 who would consider travelling to Australia in the next 12 months (n=576)

This is also the case for those who would consider travelling to the Pacific, with an almost identical proportion planning to travel for leisure or work

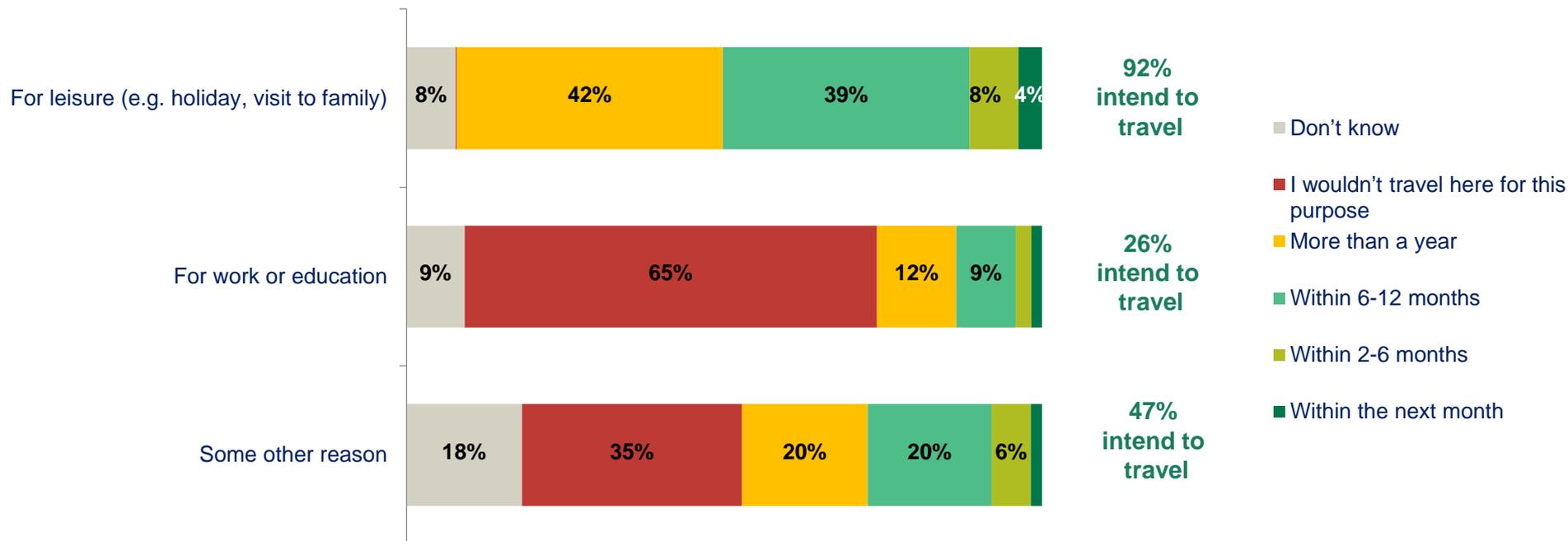
Proportion who would consider travelling to the Pacific for each purpose in the next 12 months



FIT1B: If this sort of travel were permitted today, how soon do you think you would plan to travel to the Pacific region for each purpose?
 Base: all adults 15+ in New Zealand in wave 14 who would consider travelling to the Pacific region in the next 12 months (n=367)

Only 14% are hoping to travel to Europe, but a much greater proportion were planning to travel for non-leisure purposes

Proportion who would consider travelling to EU for each purpose in the next 12 months



FIT1A: If this sort of travel were permitted today, how soon do you think you would plan to travel to the European Union for each purpose?
Base: all adults 15+ in New Zealand in wave 14 who would consider travelling to the EU in the next 12 months (n=180)

Almost a third would plan to travel somewhere else in the world for work purposes

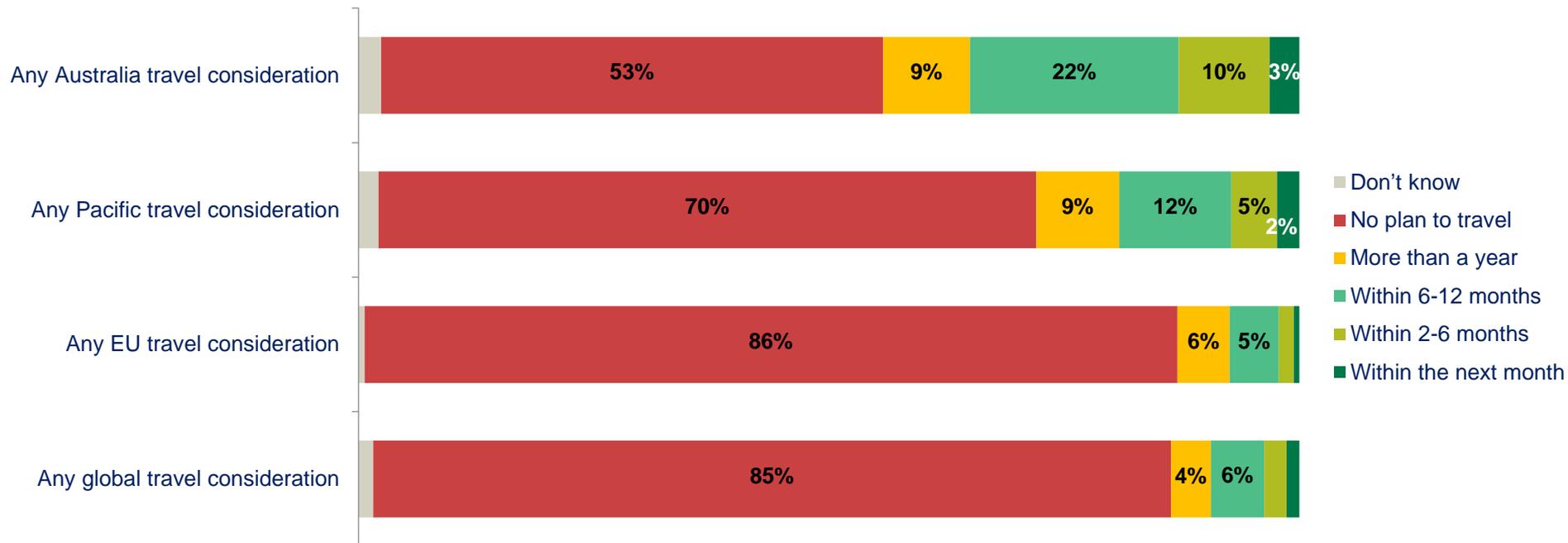
Proportion who would consider travelling to the Pacific for each purpose in the next 12 months



FIT1D: If this sort of travel were permitted today, how soon do you think you would plan to travel to somewhere internationally for each purpose?
Base: all adults 15+ in New Zealand in wave 14 who would consider travelling to the rest of the world in the next 12 months (n=201)

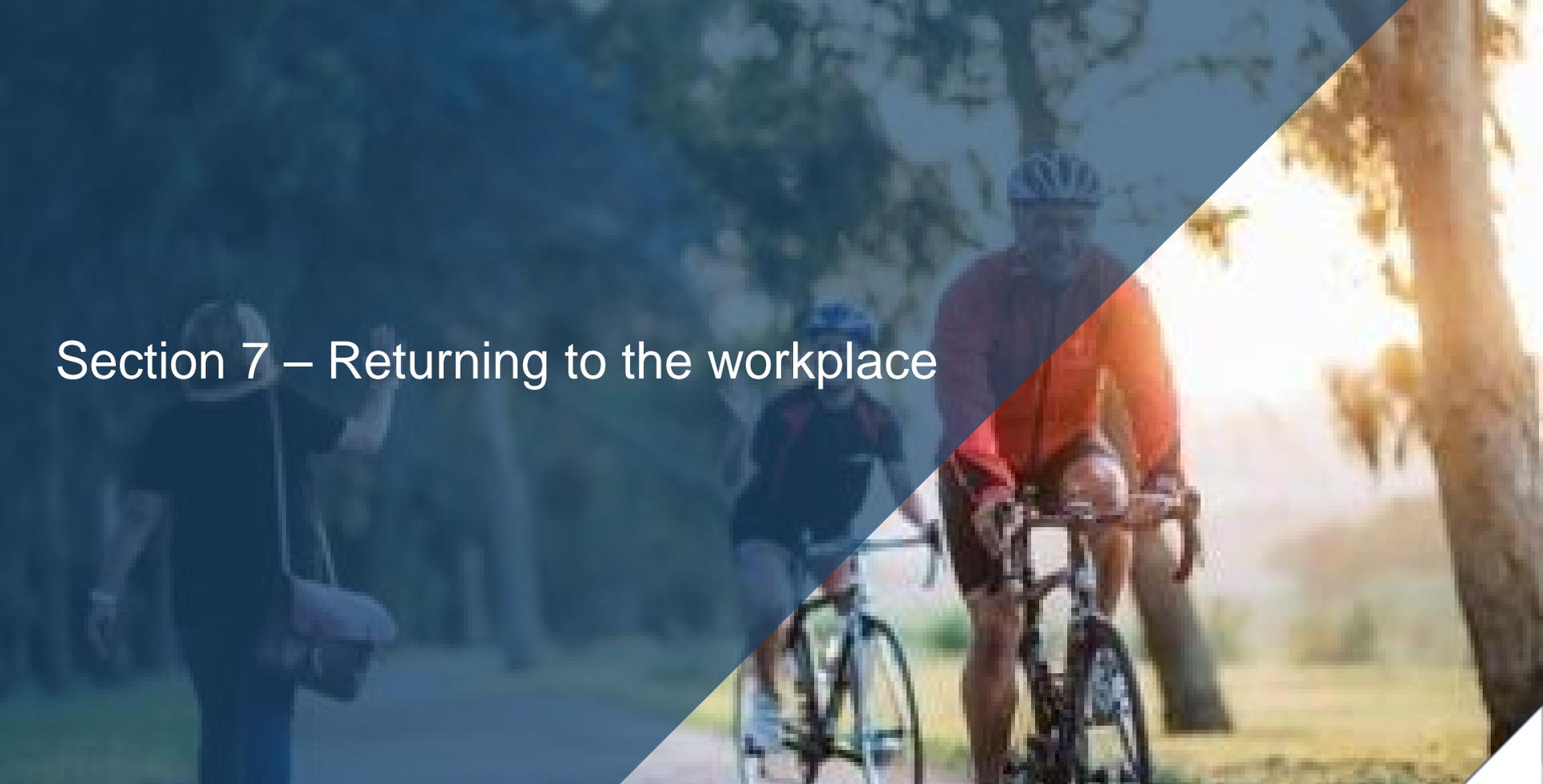
Looking at the population as a whole, the proportion planning travel is generally greater for what will be short-haul travel

Proportion who would consider travelling to each location in the next 12 months



FIT1A/FIT1B/FIT1C/FIT1D: If this sort of travel were permitted today, how soon do you think you would plan to travel to Australia/the Pacific region/ the EU/ somewhere internationally for each purpose?

Base: all adults 15+ in New Zealand in wave 14 (n=1,230)



Section 7 – Returning to the workplace

Key findings – working from home

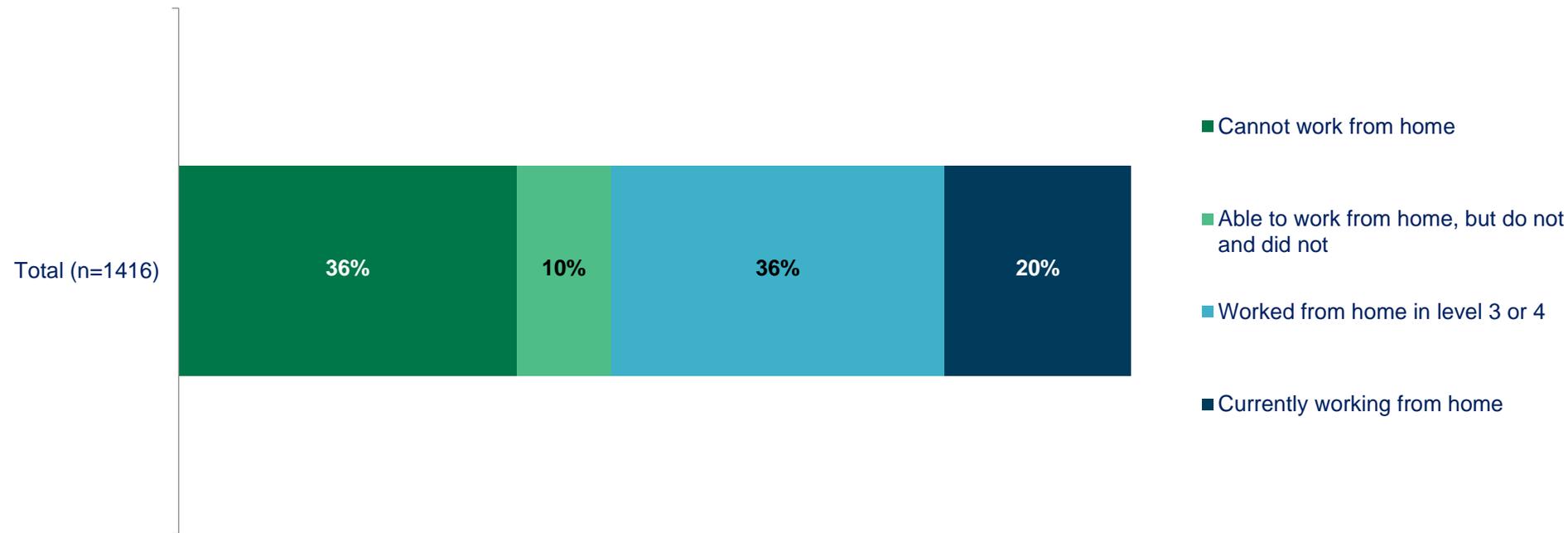
Waka Kotahi objective – understanding behaviour change

- Commuter traffic makes up a large proportion of the impact on transport infrastructure. As alert levels decrease and restrictions are relaxed, it's important to understand who will return to work travel and how, and who will continue to be absent from the commuter population.
- With many people now returning to their normal workplaces, it's important to understand how attitudinal drivers differ between these groups, those continuing to work from home and those who didn't do so even though they were able to.
- One in five are still working from home in some capacity, and in total, more than half of all workers did so at some point during lockdown, although a third were (or are) unable to work from home at all.
- Those who could but do not work from home tend to include more manual industry workers than the groups who currently work from home or who did during lockdown.
- As expected, capability is highest among those already working from home, but even in the group that doesn't do so, there is still a high expression that they are set up to do so.
- All groups of workers say that there is greater opportunity to work from home at a roughly even rate, this is not a distinguishing factor between these groups.
- Positive motivation to work from home more is higher among those who have returned to work and it isn't low among those who don't work from home, indicating a broad desire to have flexibility around this issue.
- Conversely, the majority of those who never worked from home would only want to take the option as a last resort.
- Workers want flexibility from employers on working from home, even if they're not planning to take advantage of it.



More than a third of working people say that they are unable to work from home, with one in five still working from home currently

Ability to work from home



QWORK2A/QWORK2C/QWORK2D: And where do you currently work? / Did you work from home at all during alert levels 4 and 3? / Which, if any of the following applies to your job?

Base: New Zealanders currently working in wave 13 or 14



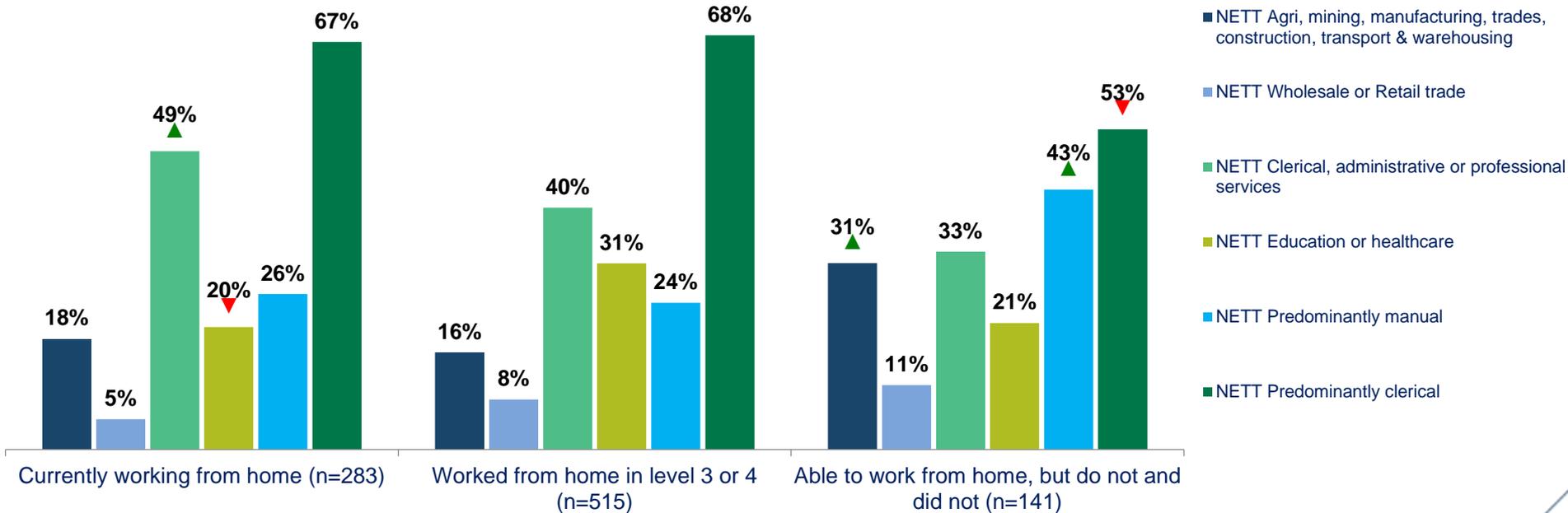
Indicates a statistically significant increase from the total



Indicates a statistically significant decrease from the total

Those still working from home are much more likely to be in clerical, administrative and professional services

Industries of people working from home



QINDUSTRY: Which sector do you currently work in?

Base: New Zealanders currently working, who are at least able to work from home wave 13 or 14



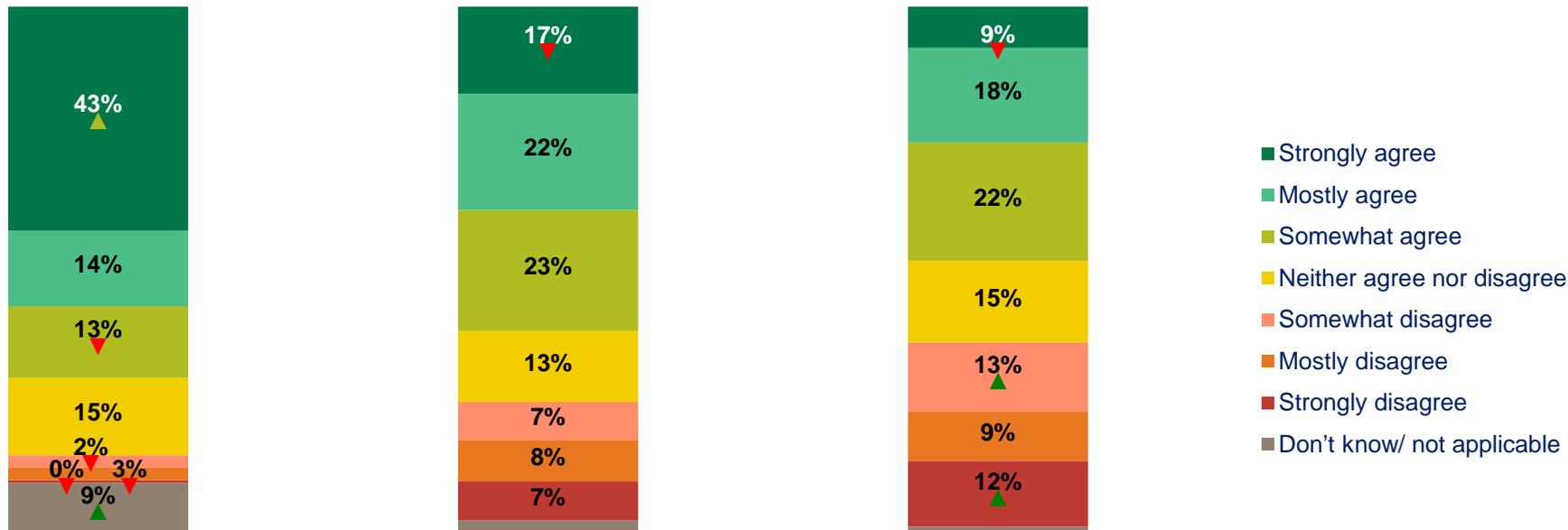
Indicates a statistically significant increase from the total



Indicates a statistically significant decrease from the total

Those working from home are much more likely to be stronger in their beliefs about their capability, although half of those who didn't WFH say they are able

Capability - I am (now) set up at home to be able to work more flexibly from home



Currently working from home (n=283) Worked from home in level 3 or 4 (n=515) Able to work from home, but do not and did not (n=141)

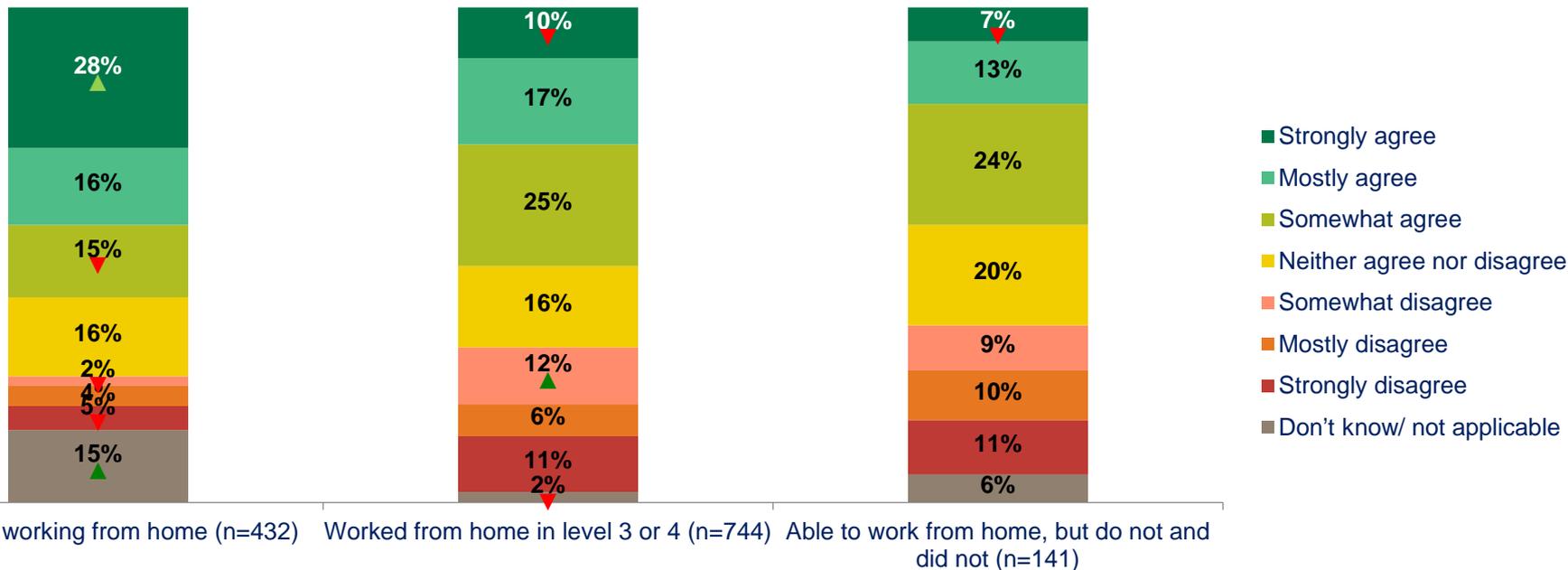
QWORK6A: Thinking now about how people's work habits may have changed after lock-down restrictions were removed, to what extent do you agree or disagree with the following statements?

Base: New Zealanders currently working, who are at least able to work from home wave 13 or 14



There is not that much difference in the scale of recognised opportunity between those who have returned to work and those who did not work from home

Opportunity - My workplace has changed how it operates so more people can regularly work from home



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

Base: New Zealanders currently working, who are at least able to work from home wave 13 or 14



A slightly greater proportion of those who have returned to the workplace would like flexibility, although the desire is stronger among those working from home

Motivation - (Now that I've experienced it) I would like more flexibly to work from home



Currently working from home (n=283) Worked from home in level 3 or 4 (n=515) Able to work from home, but do not and did not (n=141)

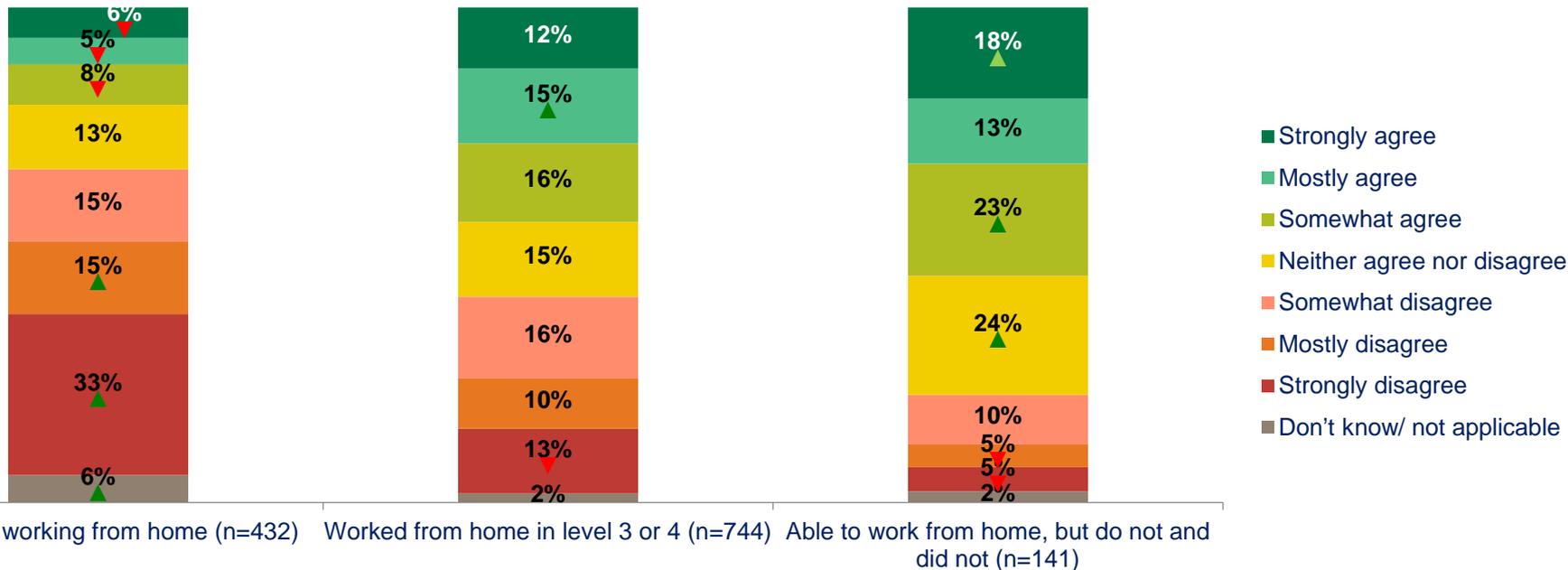
QWORK6A: Thinking now about how people's work habits may have changed after lock-down restrictions were removed, to what extent do you agree or disagree with the following statements?

Base: New Zealanders currently working, who are at least able to work from home wave 13 or 14



More than two in five of those who have returned to work agree that they'd prefer to only use it as a last resort

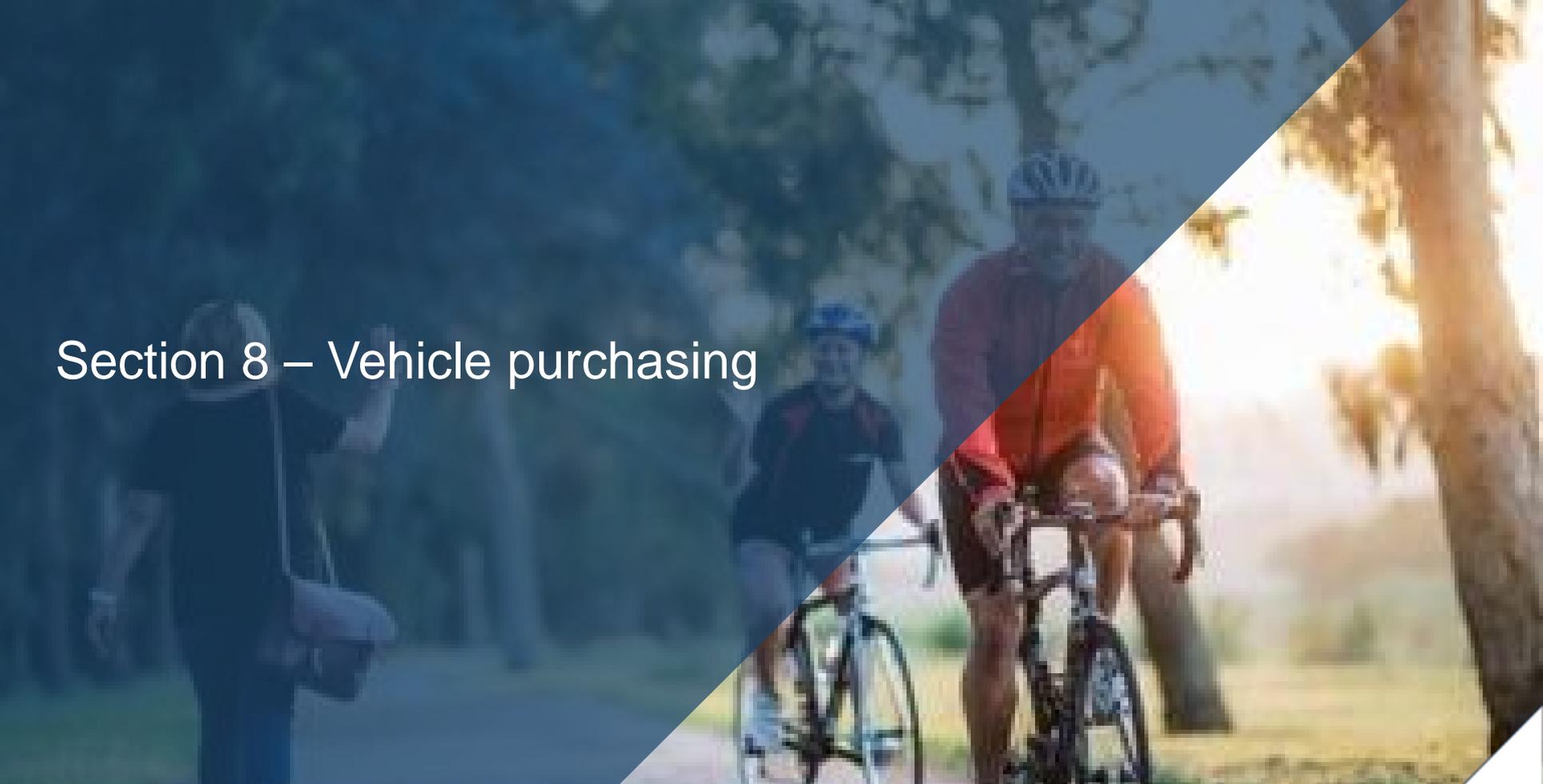
Motivation - My preference would be to only work from home as a last resort



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

Base: New Zealanders currently working, who are at least able to work from home wave 13 or 14





Section 8 – Vehicle purchasing

Key findings – vehicle purchasing

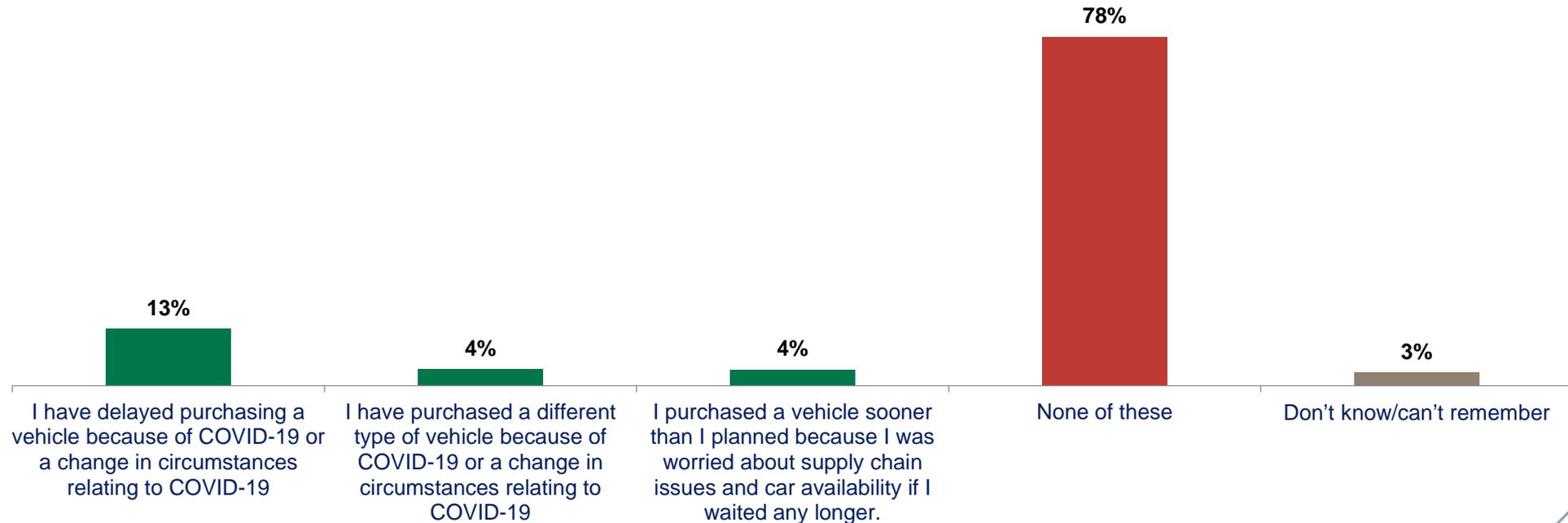
Waka Kotahi objective – understanding behaviour change

- COVID-19 had a variety of impacts on New Zealand society, including on personal income, immediate needs and purchasing behaviours. It is therefore valuable to understand how this could impact on the big transportation purchases that New Zealanders may be planning in the immediate and longer term.
- A sizable proportion of New Zealanders indicated that they had pushed back a vehicle purchase because of COVID-19, slightly off-set by a small proportion who brought forward a purchase due to concerns about future supply chains.
- In reality, while there was a significant decrease in the number of purchases made during the lockdown period compared to the proportion planning a purchase before lockdown, vehicle purchasing still took place and it is not clear whether or not the volume of foregone purchases is significantly greater than it would otherwise have been due to other delaying factors.
- The decrease from planned to actual purchases was certainly greater for electric and hybrid vehicles, but there was also a decrease between the two measures for petrol and diesel vehicles, indicating that there was not a marked switch from one vehicle type to another, just a discrepancy between planned and actual vehicle purchasing across all vehicle types.
- Looking forward, the proportion currently considering a future EV or hybrid vehicle purchase is greater than it was before lockdown, although still somewhat smaller than consideration for petrol and diesel powered vehicles.



More than one in 10 people indicated that COVID-19 caused them to delay purchasing a vehicle

Vehicle purchasing behaviours in response to COVID-19

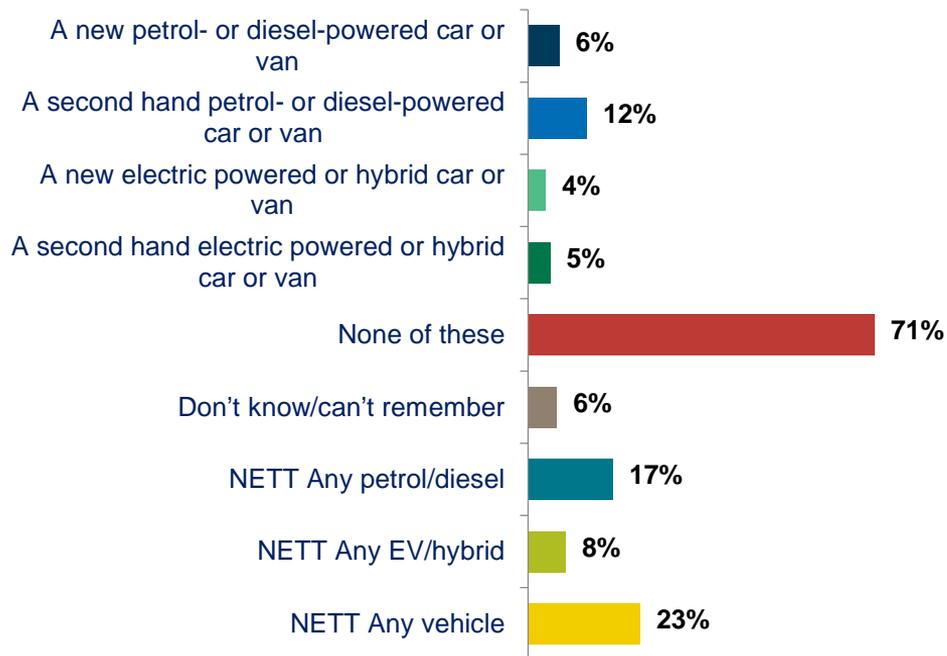


CARPURCHASE4: Which, if any of the following applies to you?

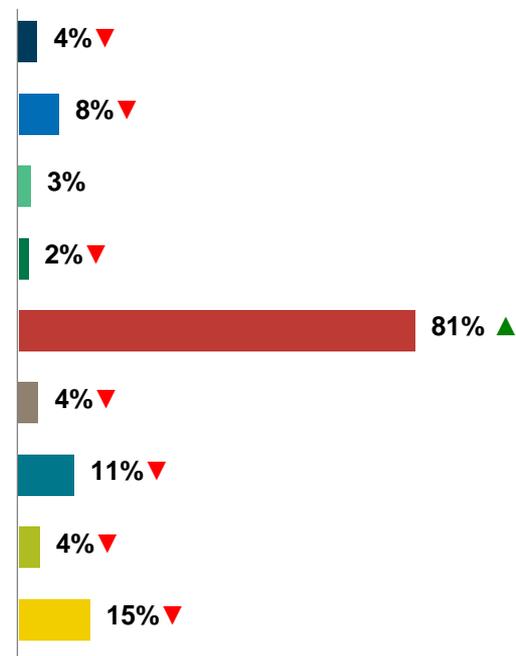
Base: all adults 15+ in New Zealand in wave 14 (n=1,230)

While purchasing did not match with pre-lockdown intent and the impact was statistically significant, new vehicle purchases still took place during lockdown

Planned vehicle purchases before lockdown



Vehicle purchases during lockdown



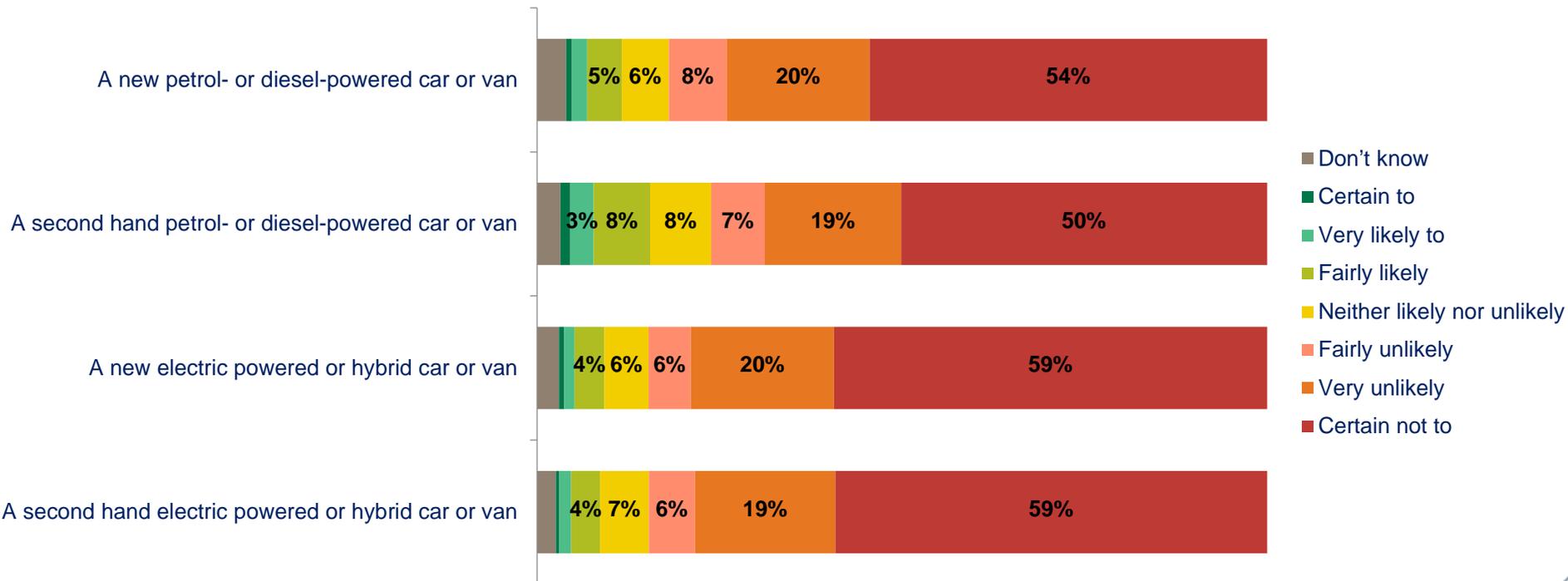
CARPURCHASE1/CARPURCHASE2: Which, if any, of the following purchases were you planning on making before any COVID-19 alert or lockdown (i.e. in March 2020), either by yourself or as a household? / And which, if any, of the following have you or someone in your household bought during the past four months (ie since March 2020)?

Base: all adults 15+ in New Zealand in wave 14 (n=1,230)



Future consideration of second hand petrol or diesel vehicles is greater than for any other vehicle type

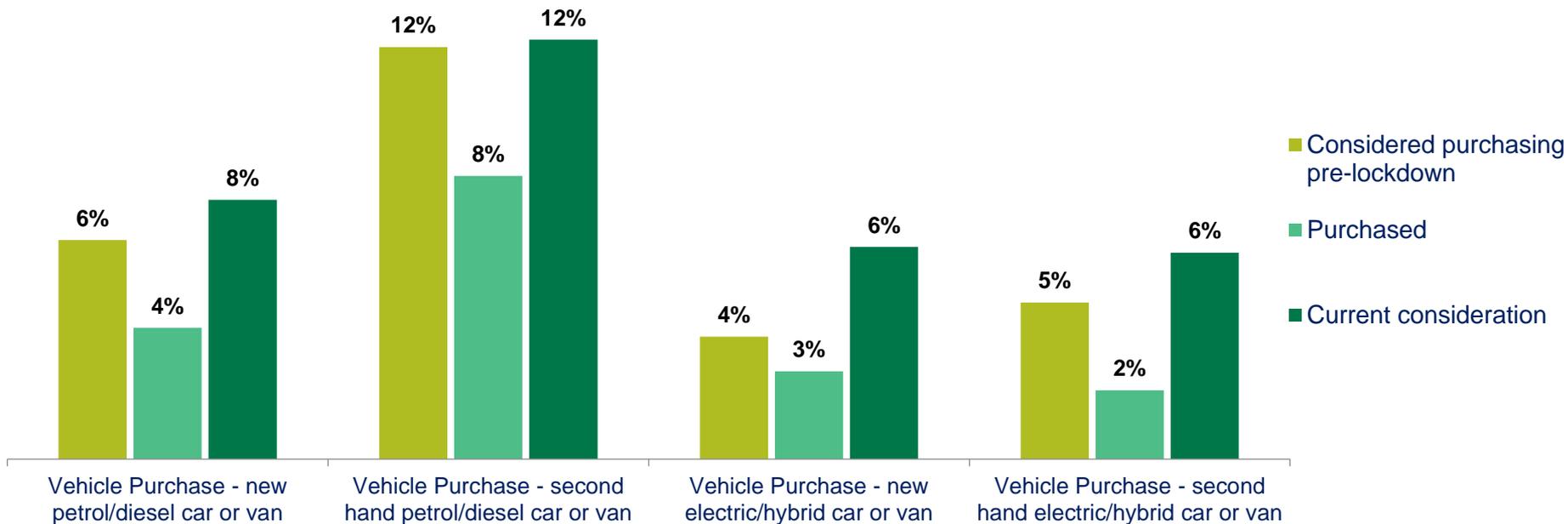
Future vehicle purchase consideration



CARPURCHASE3: And how likely are you to purchase each of the following in the next few months?
Base: all adults 15+ in New Zealand in wave 14 (n=1,230)

Future consideration of new EVs and hybrids is 50% higher than it was before lockdown

Derived impact on vehicle purchasing



CARPURCHASE3: And how likely are you to purchase each of the following in the next few months?

Base: all adults 15+ in New Zealand in wave 14 (n=1,230)

