

# Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–16 weekly core report

4 August 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](mailto: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.

\*From wave 14, fieldwork and reporting shifted to bi-weekly to account for limited shifts occurring in level 1.

# 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.

\*From wave 14, fieldwork and reporting shifted to bi-weekly to account for limited shifts occurring in level 1.

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) 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: Harmoni 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 sixteen 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, 14, 15 and 16 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 16 report is based on a statistically significant shift of results between waves 1 to 16, 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 2 July to Sunday 5 July	
15	Thursday 16 July to Sunday 19 July	
16	Thursday 30 July to Sunday 2 August	



# Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 – 16	
		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=7,561	1.13
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=1,964	2.21
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=599	4.0
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=1,129	2.92
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=601	4.0
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=607	3.98
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=2,061	2.16
<b>Disability, Vulnerability and COVID-19**</b>									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=866	3.33
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=1,640	2.42
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=830	3.4

\*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 1–16

## Waka Kotahi COVID-19 transport impact tracker

- Wave 16 of fieldwork is the sixth wave in the eighth week under level 1 conditions.
- Concerns about infection and transmission do not appear to have abated greatly since the spike in reported cases before wave 12. This may have translated gradually to a shift in behaviour, with a significant increase in the proportion claiming to self isolate in some way in wave 16. Economic concerns persist as they have done throughout lockdown.
- Two factors have had an influence on journeys in wave 16: the end of school holidays and the beginning of a new semester in tertiary education with face to face teaching. These have meant a recovery of school and education journeys respectively, with the end of holidays also cutting longer distance leisure and vacation trips.
- At the same time that universities are returning to face to face teaching, claimed weekly public transport has been resurgent across all public transport modes, with the level of claimed weekly passengers now matching pre-lockdown levels.
  - Buses have seen the biggest increase in terms of the number of passengers and the average number of travel days across the population.
  - Active mode usage is stable overall, but there has been a statistically significant increase in the proportion of claimed weekly cyclists and a commensurate increase in the average number of cycling days.
- With a number of students returning and using public transport to do so, the proportion citing a lack of need as a reason for reduced public transport travel has dropped off. So too has the proportion saying that they will return when universities reopen as this condition for return has been met.
- Lingering COVID-19 concerns are still keeping some passengers off public transport, and with students returning this plays a bigger role as a barrier among those with reduced travel.
- For the first time, there has been a marked reduction in the proportion saying that they are likely to travel for holidays or to visit friends and family in the next six months. Based on their responses, the projected negative change in tourism journeys has increased for all tourism journey types.
- Those planning tourism activities are prioritising less taxing choices like city and beach breaks and plan to travel to the most logical locations to do these.
- The use of online shopping to meet needs during lockdown may have translated into a more permanent change in shopping behaviours for some categories, with electronics and whitewares seeing an increase in planned online purchases in wave 16.
- Continued working from home is keeping some traffic off of transport networks. Among those working from home some of the time, there does not appear to be a concentration of days where they do so that would materially impact on commuter traffic above other days.

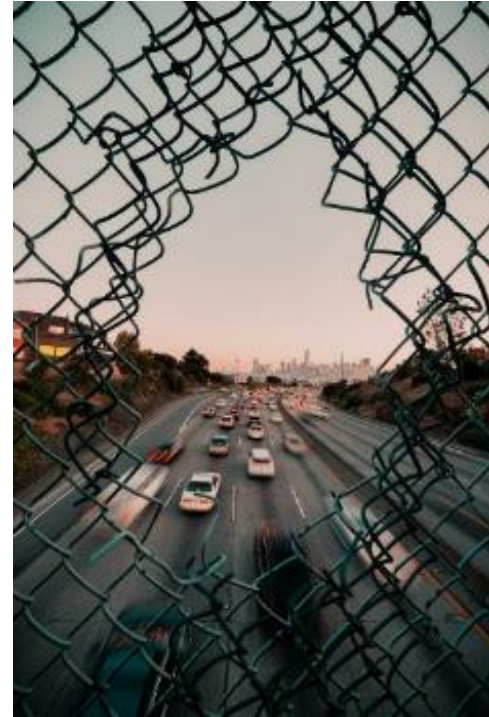
A photograph showing a person walking on the left and two cyclists on the right, all on a path. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is dark blue, and the lower-right portion is a lighter, natural color. The text 'Section 3 – Context' is overlaid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

## Section 3 – Context

# Key findings – context

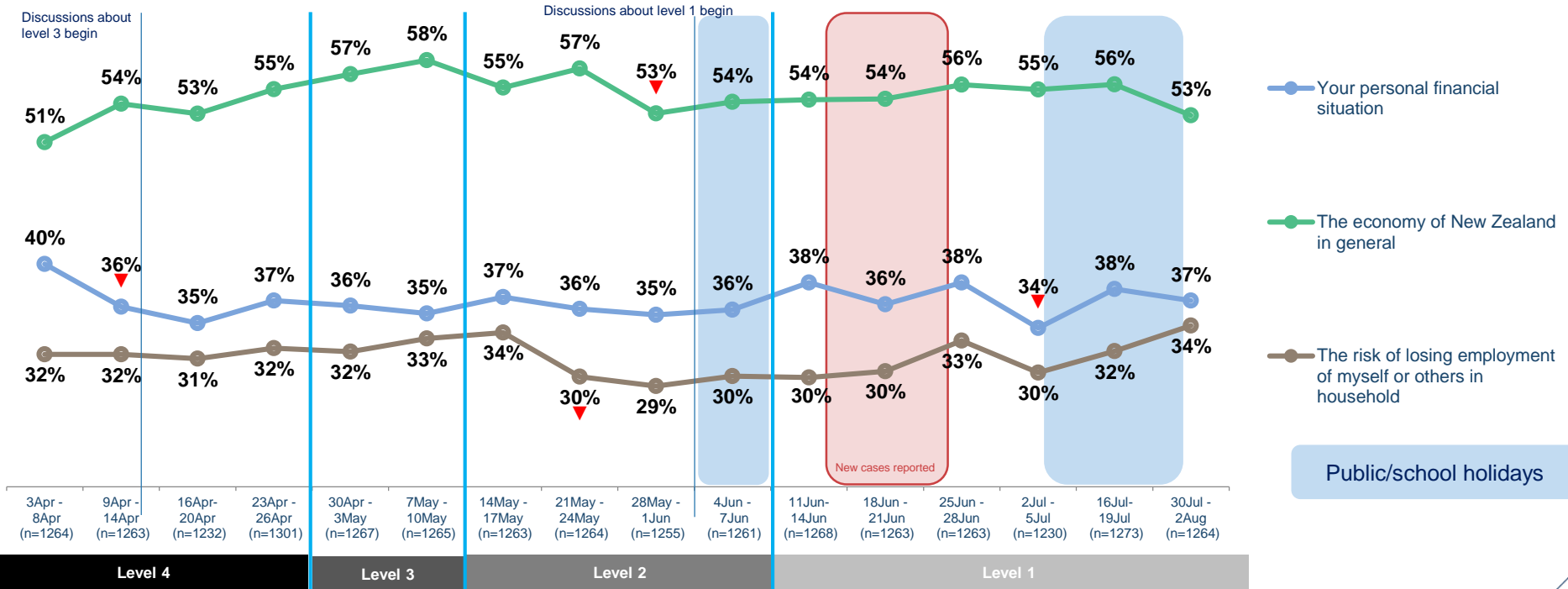
## Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- Understanding attitudes around COVID-19 provides the context in which journey and mode changes can be viewed. General fears and attitudes may work as external factors influencing the choices that New Zealanders make.
- Economic concerns around the impact of COVID-19 are largely unchanged, although there has been continued increase in the proportion claiming to be concerned about job security.
- Explicit concerns about infection and transmission have not abated to the low level they reached at the start of level 1. Since new cases were reported ahead of wave 12, more than a third have expressed explicit concern about catching the virus in each subsequent wave of interviewing.
- Contextually, the public continues to receive updates about new cases caught at the border among returning New Zealanders.
- In light of this consistently high level of concern, there has been a slight reversion towards self isolation, with roughly one in four now wholly or partially self isolating, the highest proportion since wave 12.



# Although not statistically significant wave on wave, there has been a steady increase over July in those concerned about risk of job loss

## Concerns: economic concerns

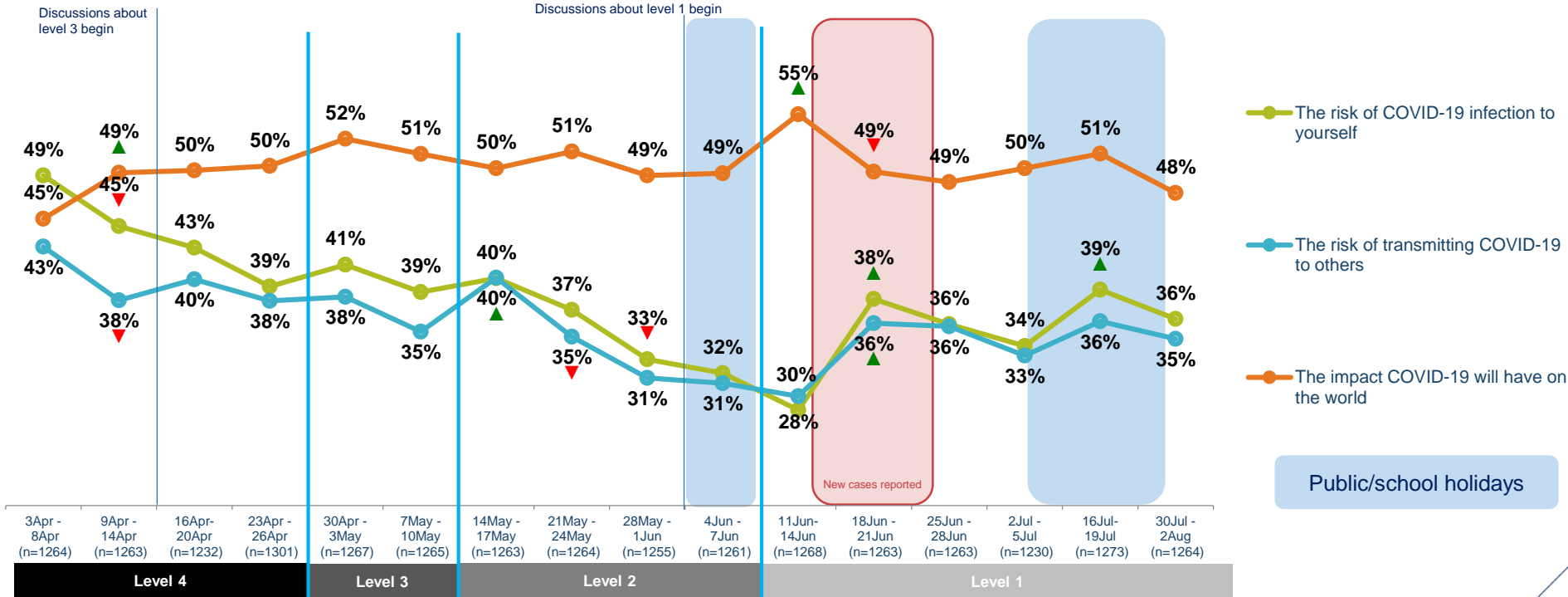


QPTUSE3. How personally concerned are you about each of the following?  
Base: all adults 15+ in New Zealand



# Concerns about COVID-19 transmission have not recovered to the lower level seen at the start of level 1

## Concerns: COVID-19 transmission



QPTUSE3. How personally concerned are you about each of the following?

Base: all adults 15+ in New Zealand



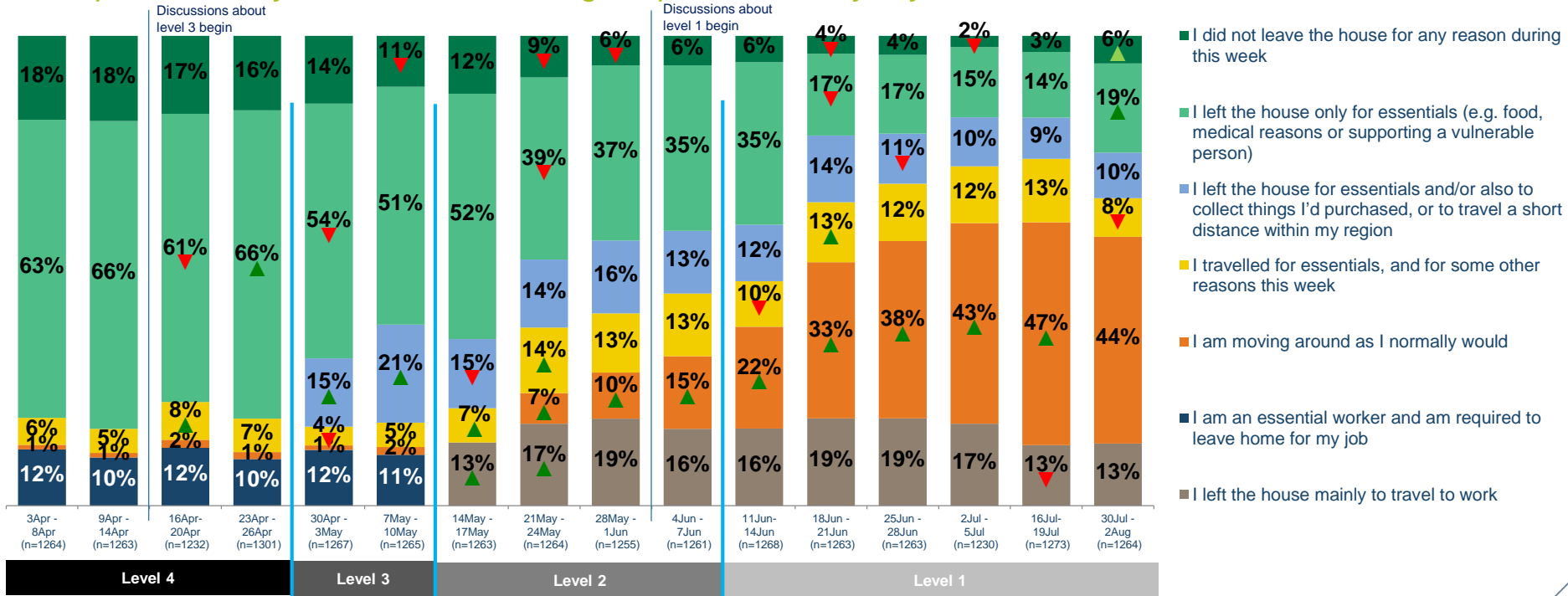
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# There has been a significant increase in those wholly or partially self-isolating in wave 16

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

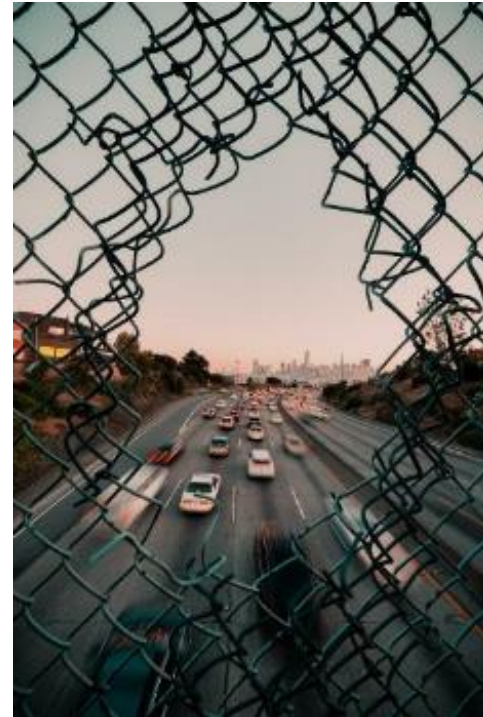


## Section 4 – Local and domestic journeys

# Key findings – local and domestic journeys

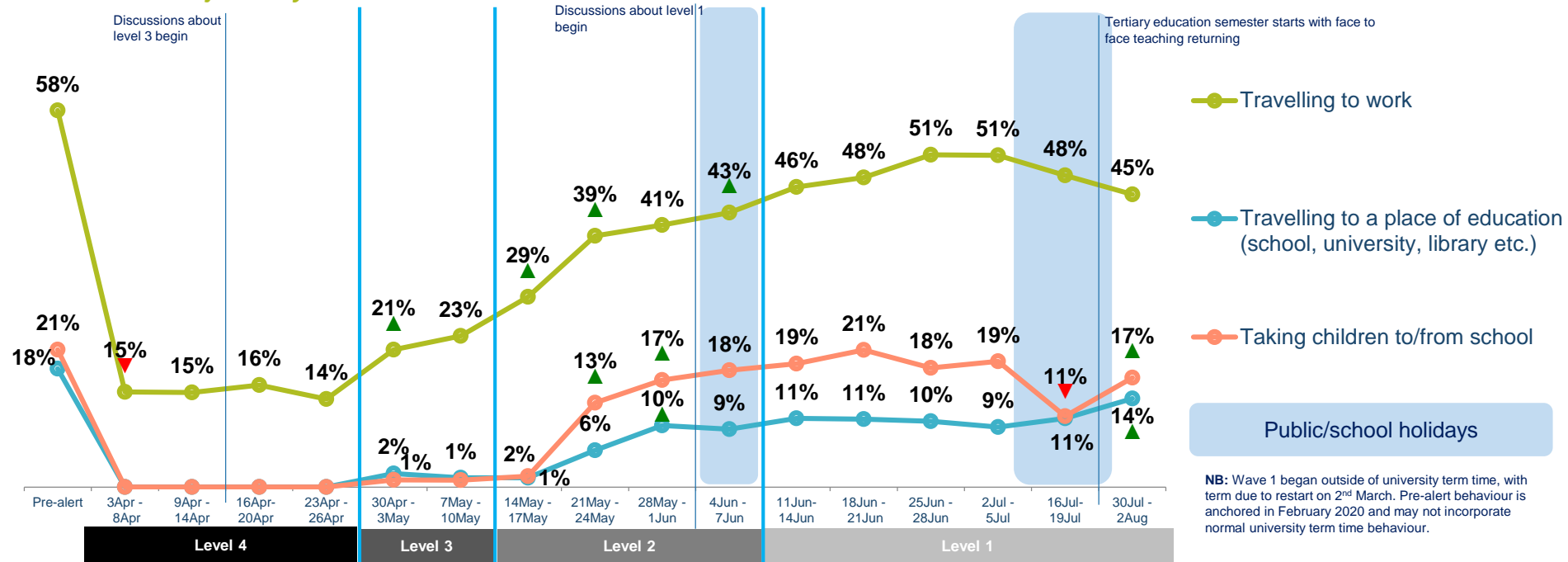
## Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels, we have been tracking changes in journeys made at a local and national level as and when they have been permitted under lockdown conditions.
- Two factors had a large influence on journeys during wave 16:
  - Firstly, the recent school holidays came to an end, which has meant many or most children returning to school during the period preceding interviewing.
  - Secondly, tertiary education providers (eg universities) began a new semester, with face to face teaching returning for the first time since lockdown.
- The proportion taking children to and from school in this wave reverted to an incidence close to that seen before school holidays, although there appears to be some lag in the return of work journeys during this time.
- The proportion travelling for education purposes increased to the highest level recorded since COVID-19 lockdowns began, however, this is still four points short of the claimed incidence pre-alert.
- In addition, the end of school holidays meant a marked decrease in past week holiday trips and visits to family and friends.



# Although school and university trips have recovered this wave, there has been a continued directional drop in the proportion travelling to work

## Essential journeys

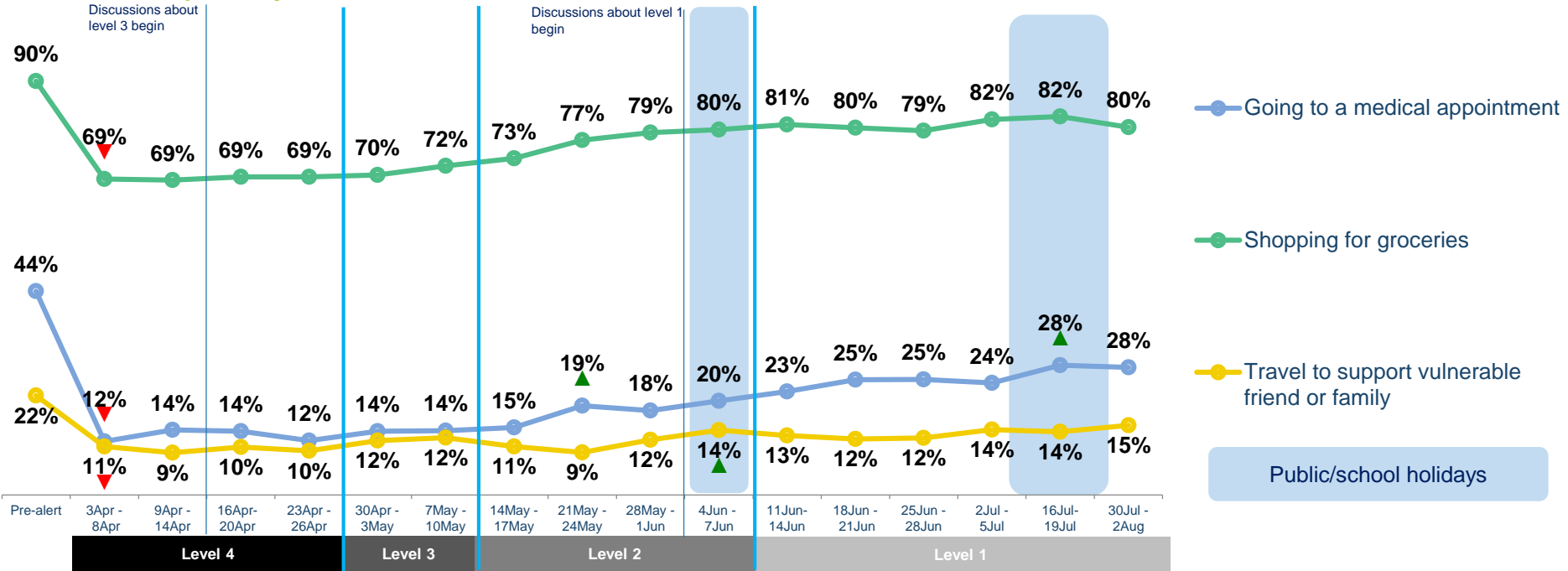


NB: Wave 1 began outside of university term time, with term due to restart on 2<sup>nd</sup> March. Pre-alert behaviour is anchored in February 2020 and may not incorporate normal university term time behaviour.

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), wave 14 (n=1,230), wave 15 (n=1,273), wave 16 (n=1,264)

# The proportion travelling to medical appointments has remained stable at 28% following the school holidays

## Essential journeys

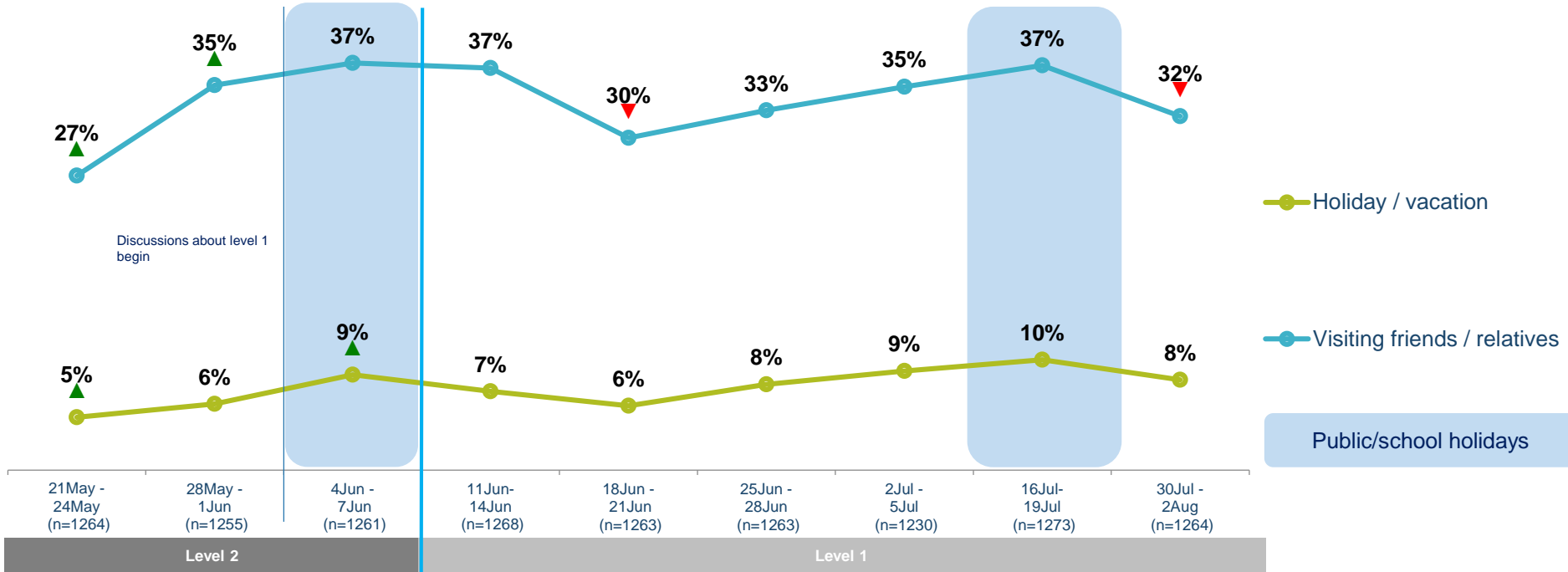


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# Past week holiday journeys and visits to family and friends have dropped off after the school holidays

## Domestic journeys



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), wave 15 (n=1,273)



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

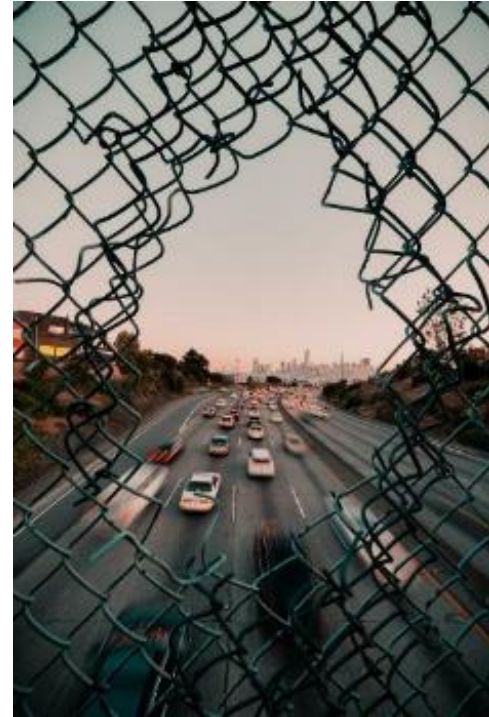
## Section 5 – Modal changes



# Key findings – modal changes

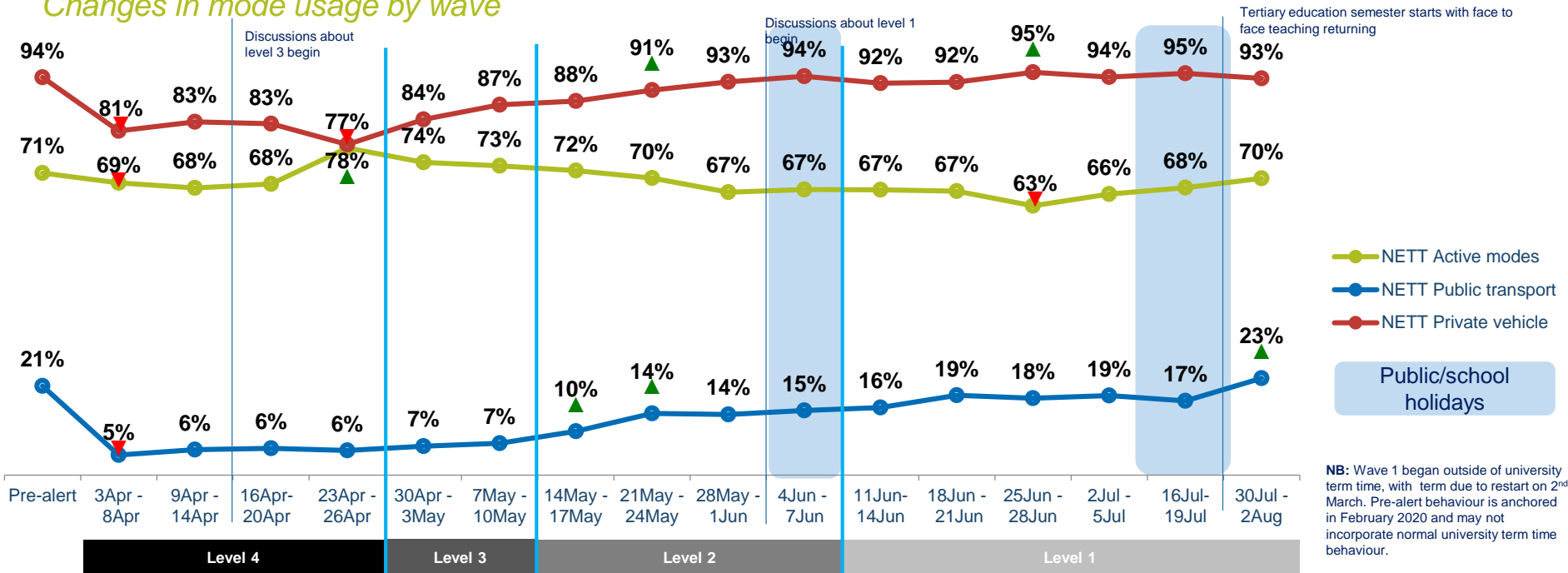
## Waka Kotahi objective – how and why is travel changing?

- Within the context of COVID-19 and changing travel restrictions it is important to understand how the transportation modes that New Zealanders are choosing have changed in response to this and which parts of the transport network are most impacted by these changes.
- In light of the changes in journeys types during wave 16, there have been marked increases in all types of public transport usage and some recovery in active mode travel.
- A roughly equal proportion claimed to have used public transport in the past week as claimed to have done so prior to lockdown, suggesting that for the first time the number of unique passengers each week may have fully recovered.
- All forms of public transport have grown to drive this, although this hasn't translated into a significant increase in the average number of travel days for all modes, with the additional train usage perhaps looking more occasional compared to buses which saw an increase in travel days reflecting the higher number of passengers.
- Consideration of public transport has continued to be a somewhat reliable lead indicator for public transport usage.
- At the same time that universities are returning and public transport usage has increased, there has been a significant increase in the proportion claiming to cycle at least once a week with a proportionate increase in the average number of days of bike travel.



# The proportion claiming to use public transport during the past week increased significantly and is above pre-lockdown claimed usage for the first time

## Changes in mode usage by wave

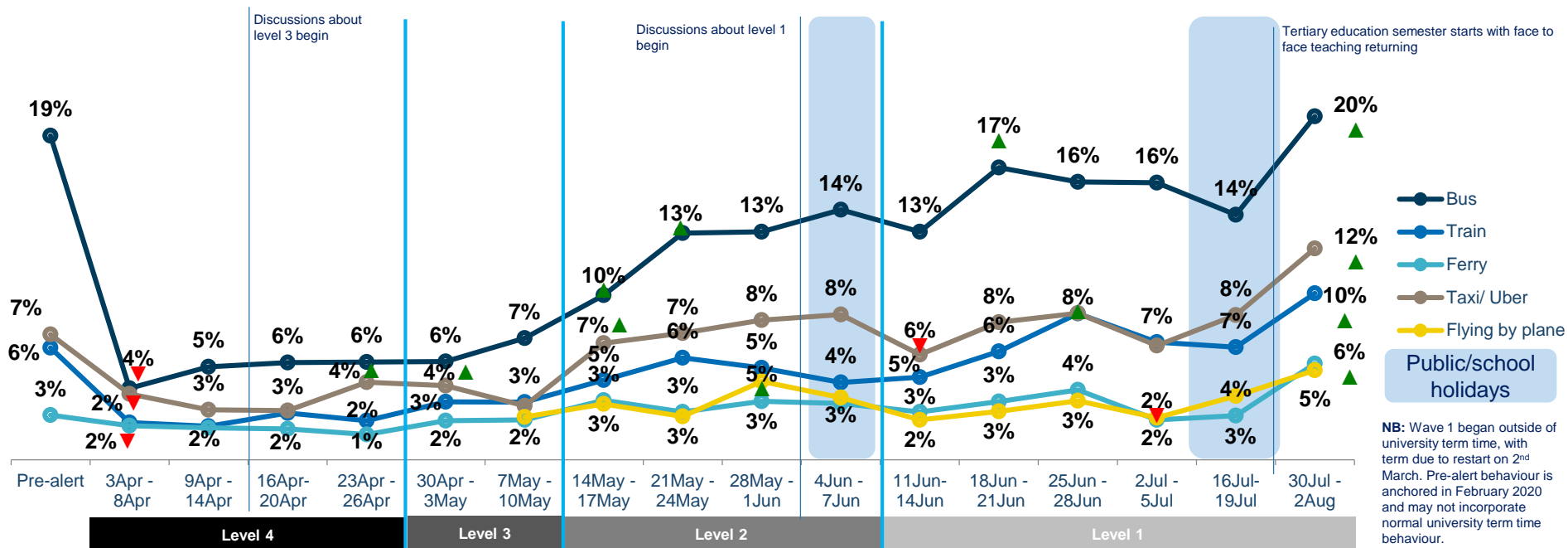


NB: Wave 1 began outside of university term time, with term due to restart on 2<sup>nd</sup> March. Pre-alert behaviour is anchored in February 2020 and may not incorporate normal university term time behaviour.

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), wave 15 (n=1,273), wave 16 (n=1,264)

# All public transport modes have seen a statistically significant increase in wave 16, with bus usage roughly equivalent to claimed pre-lockdown behaviour

## Changes in mode usage by wave

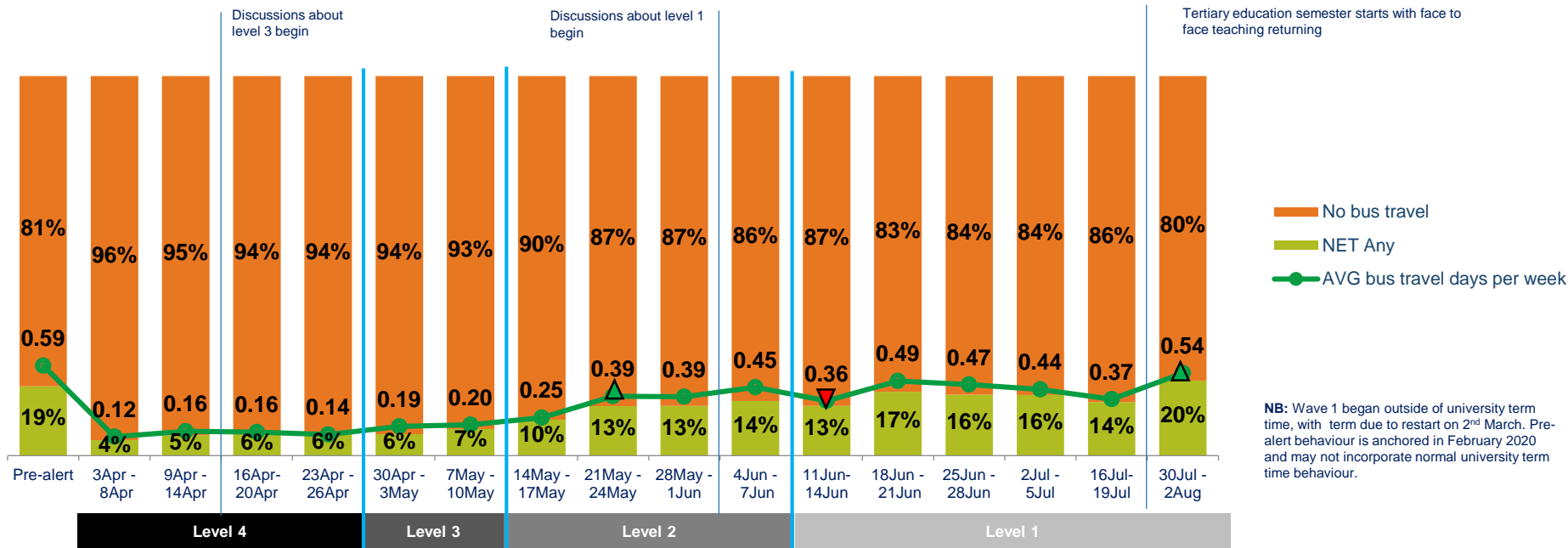


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# The claimed volume of bus travel days is higher in wave 16 than it has been at any point during lockdown, with half a day of travel per week on average

## Bus travel – mode usage and frequency



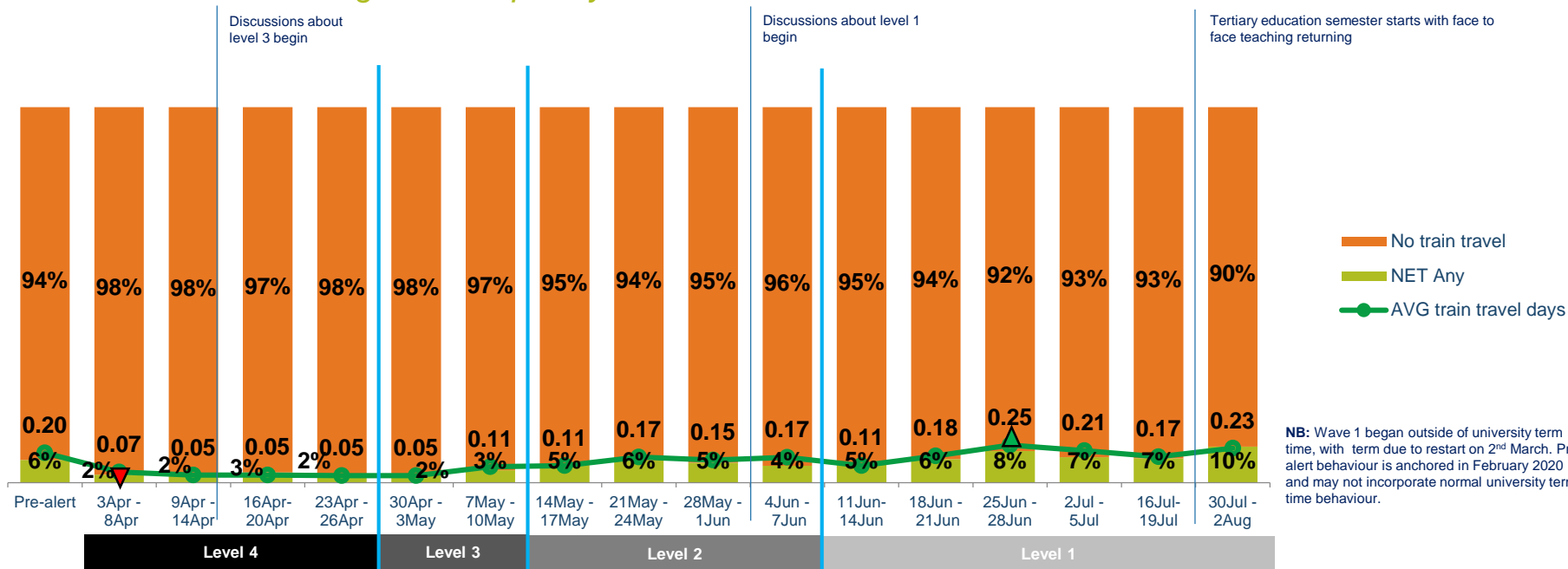
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Although the number claiming to travel by train increased significantly, there wasn't as large an increase in travel days, potentially due to more one-off occasional travel

### Train travel – mode usage and frequency

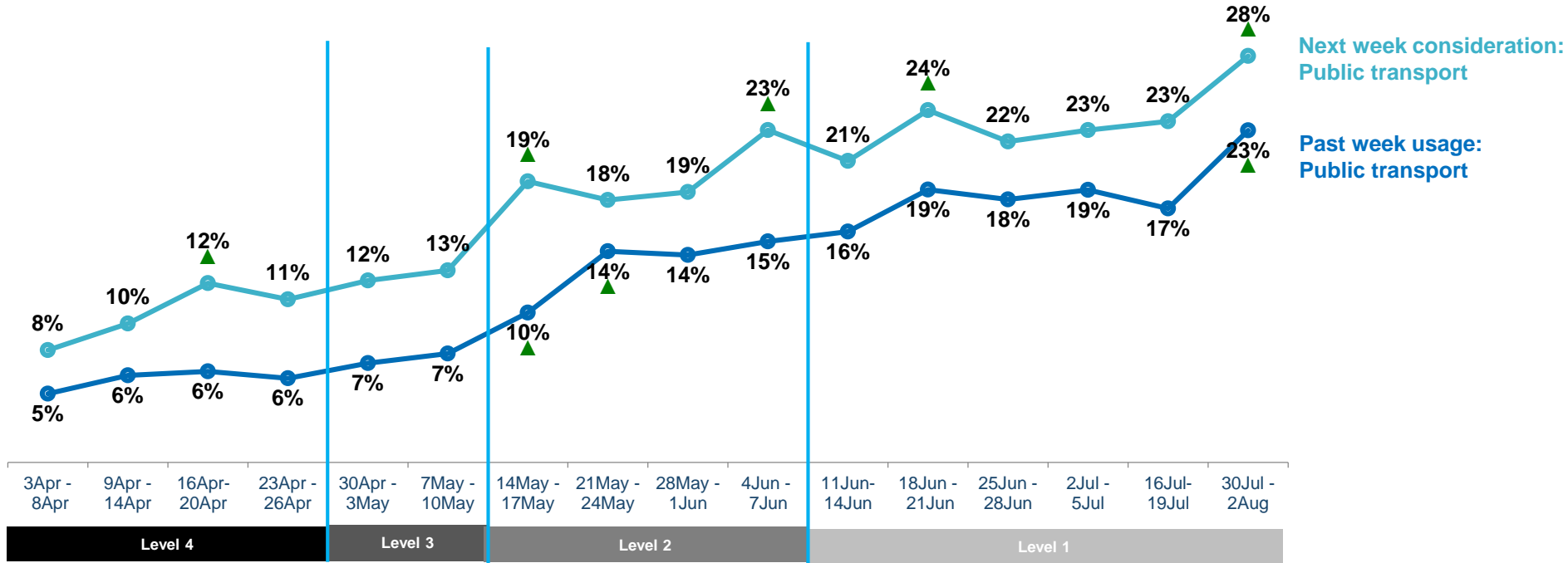


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# Public transport usage during wave 16 is roughly the same as stated consideration from wave 15, consideration also increased significantly this wave

## Current mode usage vs mode consideration (public transport)



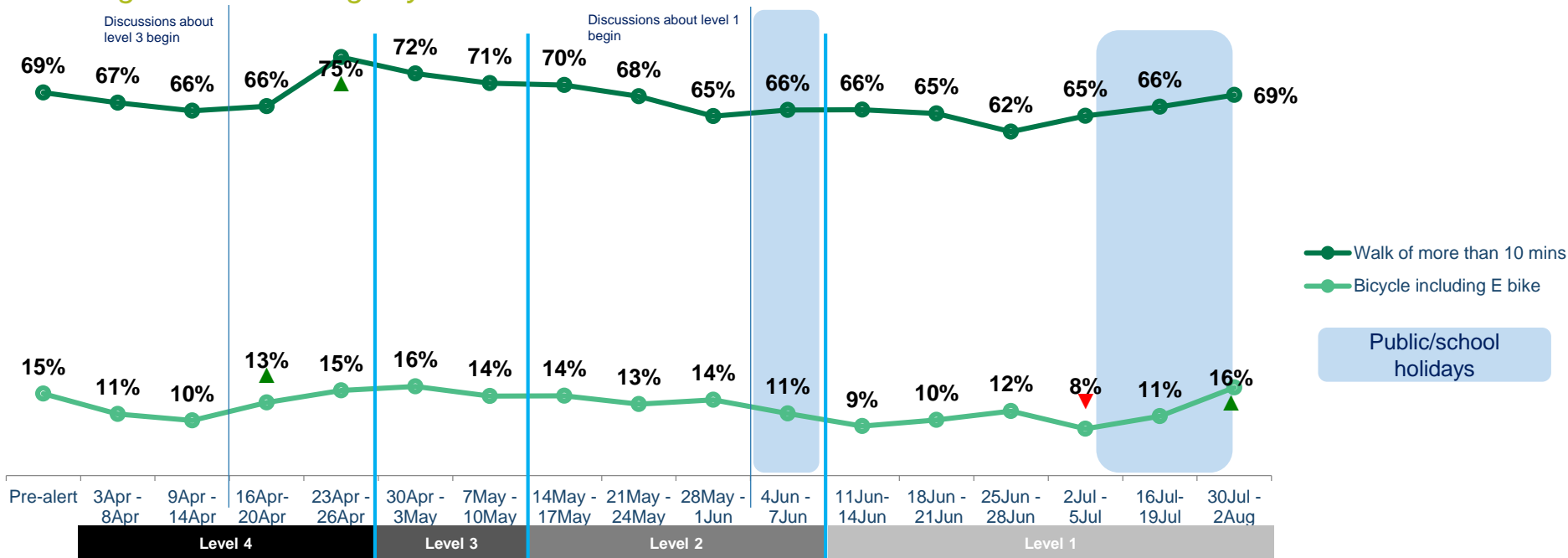
QPT2. If available next week, which if any of the following would you be likely to use?

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), wave 14 (n=1,212), wave 15 (n=1,256), Wave 16 (n=1,237)



# Active mode travel has been recovering slightly, with the proportion claiming to cycle at the highest point since level 3

## Changes in mode usage by wave

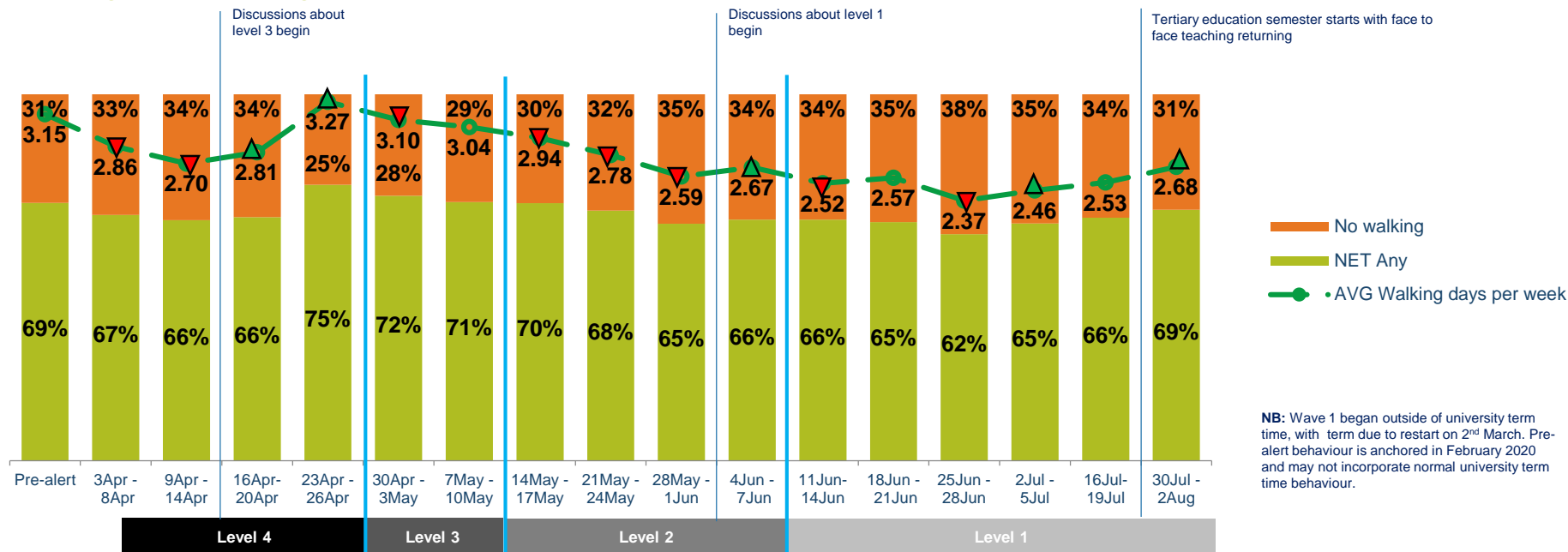


QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys 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), wave 15 (n=1,273), wave 16 (n=1,264)



# The average number of days walking has increased in line with the proportion claiming to travel that way, with more than 2.5 days travelling that way per week

## Walking – mode usage and frequency



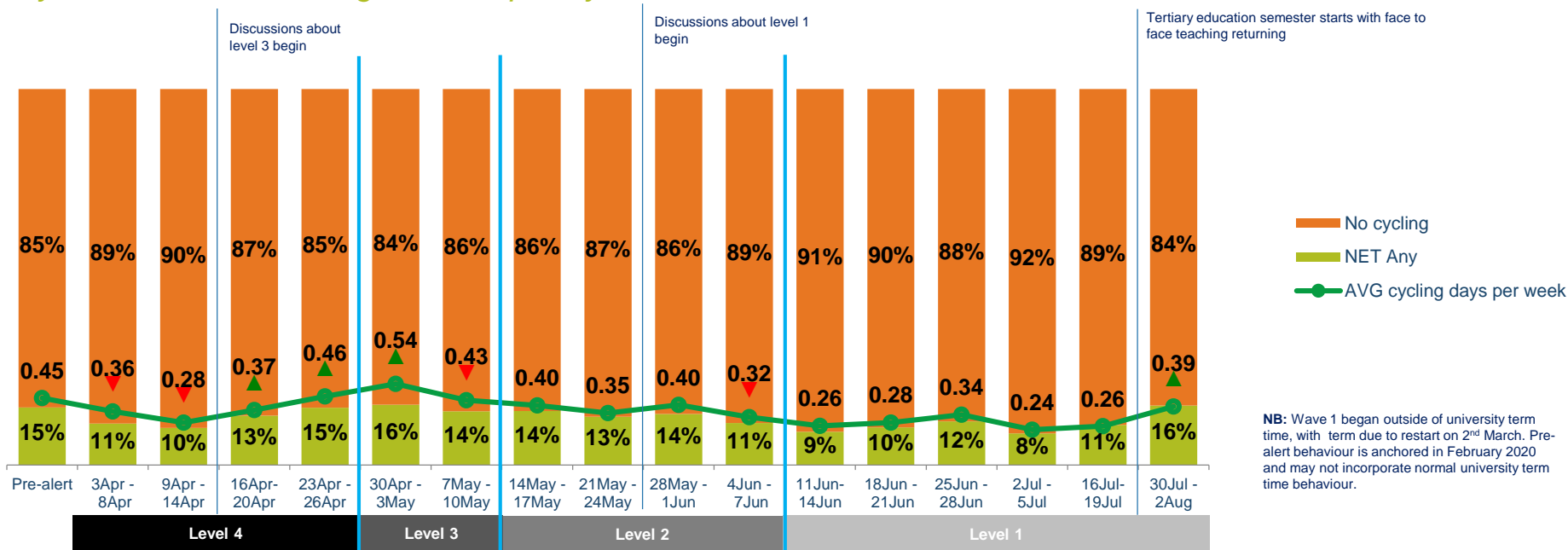
**NB:** Wave 1 began outside of university term time, with term due to restart on 2<sup>nd</sup> March. Pre-alert behaviour is anchored in February 2020 and may not incorporate normal university term time behaviour.

QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); 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); Wave 15 (n=1,273), wave 16 (n=1,264)



# The average number of cycling days has recovered significantly, but is still a little way short of the volume recorded at the start of level 3

## Cycle travel – mode usage and frequency



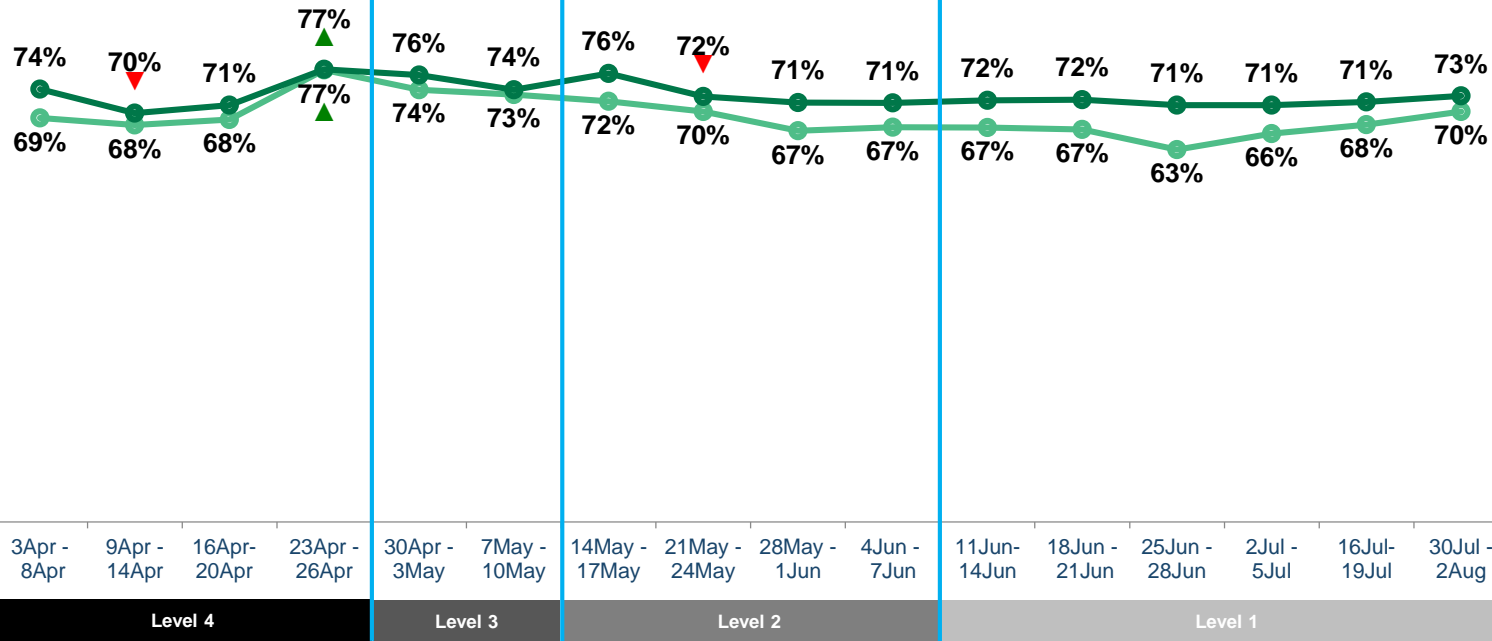
NB: Wave 1 began outside of university term time, with term due to restart on 2<sup>nd</sup> March. Pre-alert behaviour is anchored in February 2020 and may not incorporate normal university term time behaviour.

QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); 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); Wave 15 (n=1,273), Wave 16 (n=1,264)



# Consideration of active modes as a means of travel has continued to track just a little ahead of claimed usage, but the two remain close together

## Current mode usage vs Mode consideration (Active Modes)



Next week consideration: active modes

Past week usage: active modes

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), wave 14 (n=1,212), wave 15 (n=1,256), wave 16 (n=1,237)



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

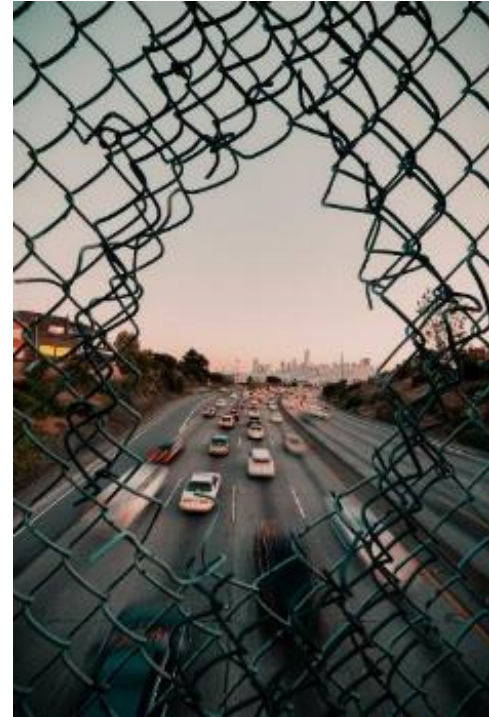


## Section 6 – Changes in public transport usage

# Key findings – changes in public transport usage

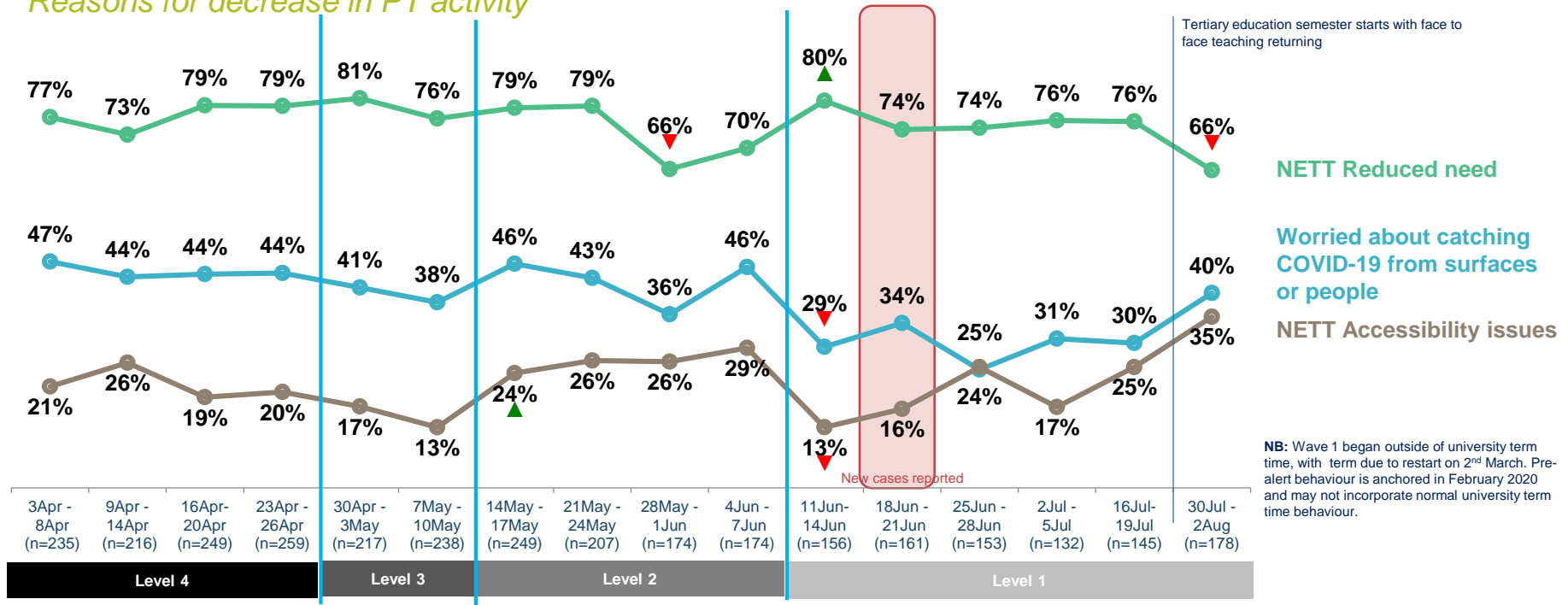
## Waka Kotahi objective – how and why is travel changing?

- 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.
- Although we have seen an increase in stated public transport usage within the population as a whole, patronage volume for most modes is not back at pre-lockdown levels, as some passengers continue to forgo or minimise the number of days they travel.
- From previous waves it's clear that reduced need driven by people not returning to work or higher education was stalling the return to public transport. The return of face to face teaching in the new semester has resulted in one of these factors being largely removed. Meanwhile the heightened concern about COVID-19 transmission has persisted.
- As a result, the proportion citing reduced need as a reason for decreased travel and citing places of education opening as a trigger for returning to public transport has dropped off.
- The combination of these factors has meant that the role of COVID-19 transmission as a barrier to return has proportionately increased among those still not travelling.



# Among those using public transport less, reduced need is less of a factor in wave 16, but COVID-19 and accessibility have grown as barriers

## Reasons for decrease in PT activity



NB: Wave 1 began outside of university term time, with term due to restart on 2<sup>nd</sup> March. Pre-alert behaviour is anchored in February 2020 and may not incorporate normal university term time behaviour.

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



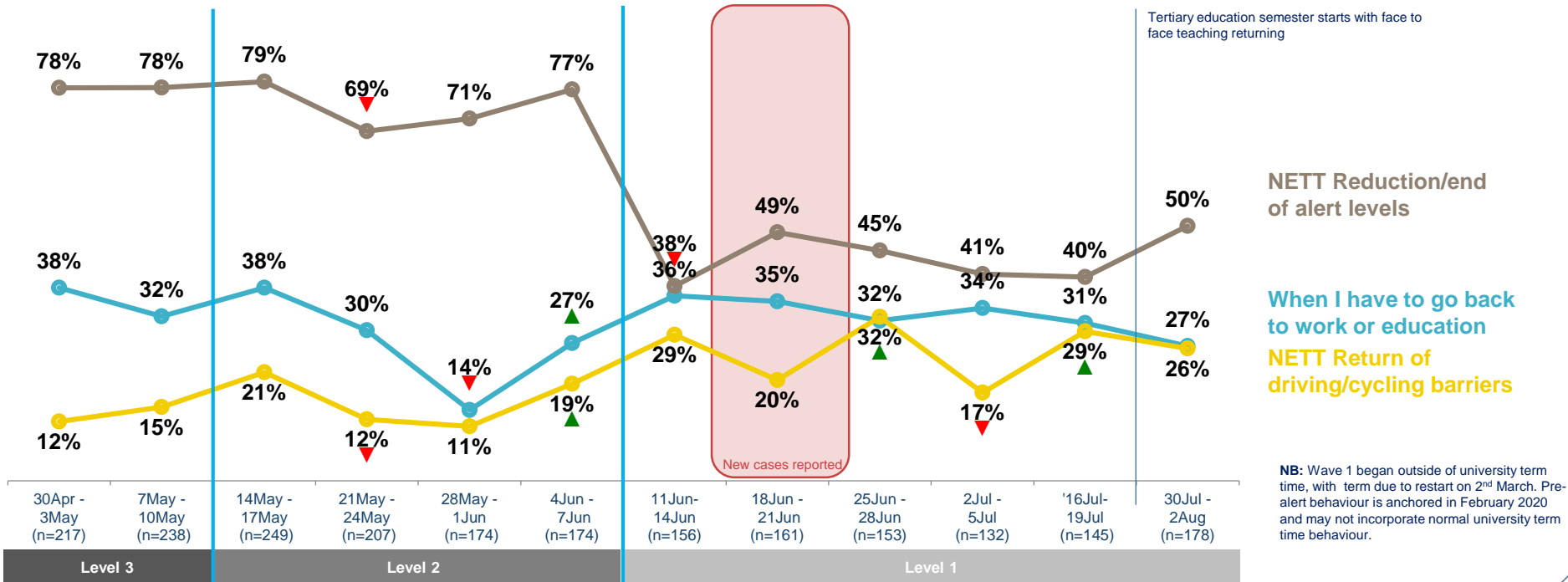
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# With the return of universities in recent weeks, fewer and fewer say they are waiting for this as a trigger to return to public transport

## Triggers for returning to public transport usage in the future

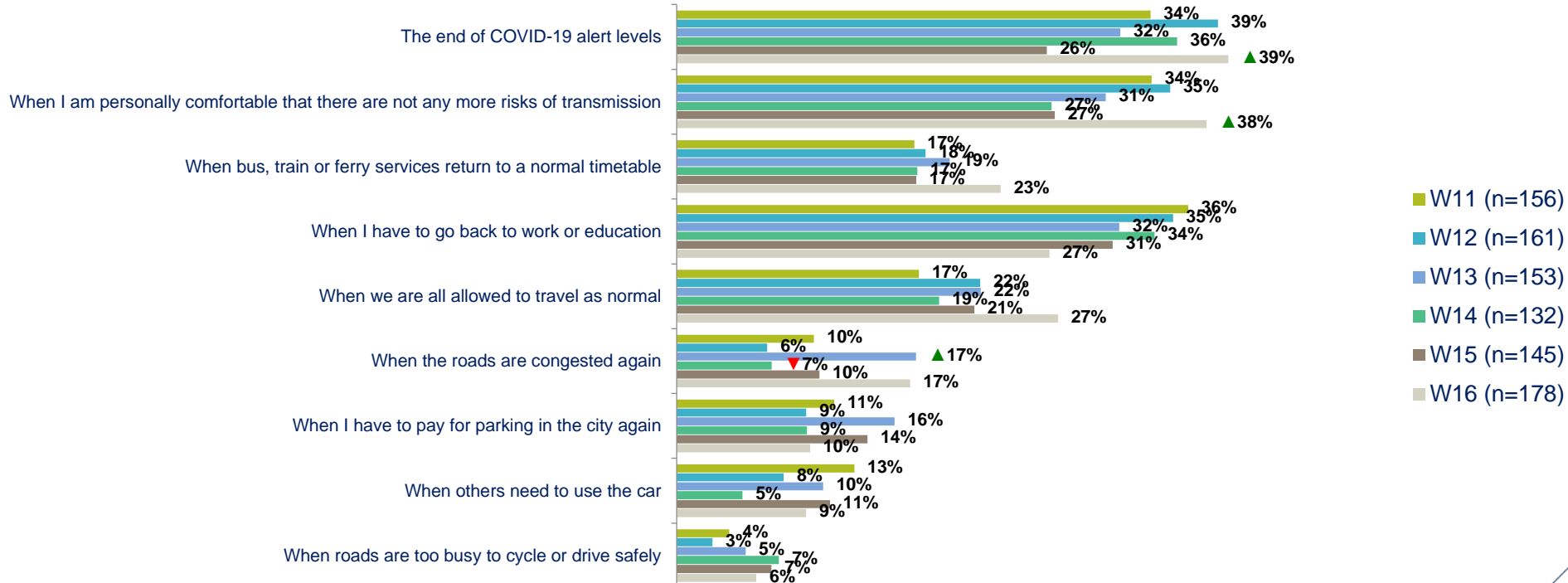


**NB:** Wave 1 began outside of university term time, with term due to restart on 2<sup>nd</sup> March. Pre-alert behaviour is anchored in February 2020 and may not incorporate normal university term time behaviour.

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

# An explicit end to alert levels and alleviation of personal transmission concerns jumped sharply in wave 16 as triggers for public transport return

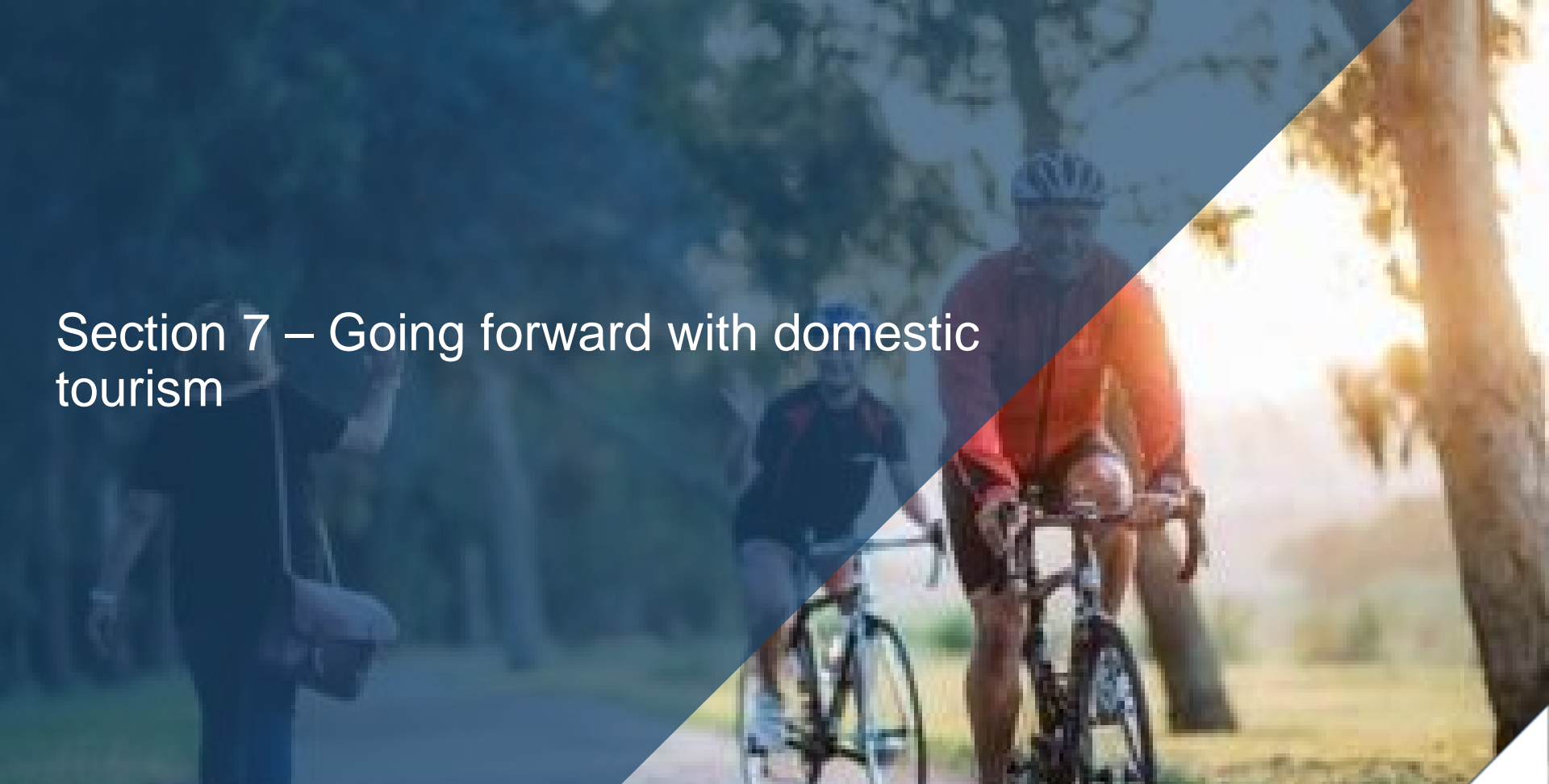
## Triggers for returning to public transport usage in the future



QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?

Base: decreasing PT usage in past week





## Section 7 – Going forward with domestic tourism



# Key findings – going forward with domestic tourism

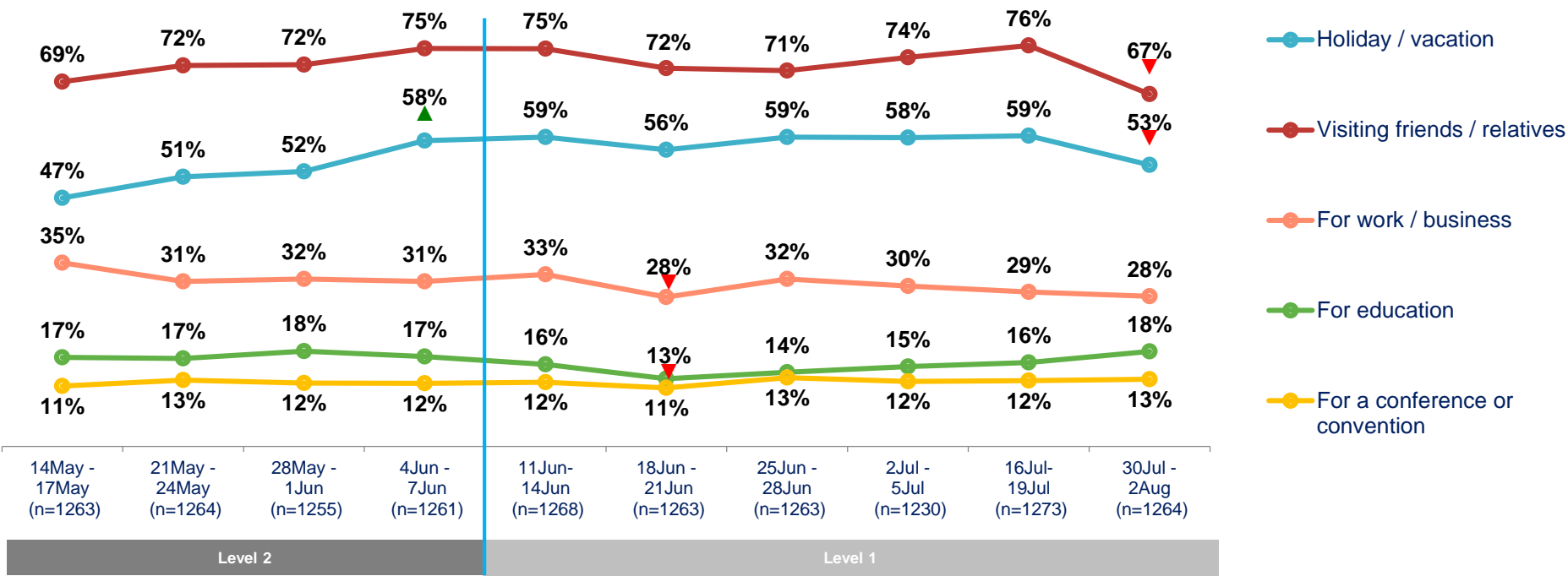
## Waka Kotahi objective – how will domestic tourism change going forward?

- New Zealand has opened up internally to domestic travel while borders remain closed. It is important to understand how domestic tourism in this context will make up a large proportion of the longer distance on the transportation network.
- For the first time, there has been a marked reduction in the proportion saying that they are likely to travel for holidays or to visit friends and family in the next six months.
- Based on their responses, the projected negative change in tourism journeys has increased for all tourism journey types.
- Tourism activities will therefore have a lower base of tourists from which to draw income. Less physically taxing activities such as city attractions, beaches and short walks appear poised to receive more of this tourist traffic than longer physical excursions.
- Outside of these, the areas of particular DOC interest are as much influenced by population distribution as anything else, with the proportion selecting regions as a destination reflective of the number of people living there. This may translate into fewer people making longer journeys for these types of activities compared to city or beach breaks.



# The proportion saying they are likely to travel to visit friends and relatives dropped to the lowest level recorded, with holiday planners decreasing too

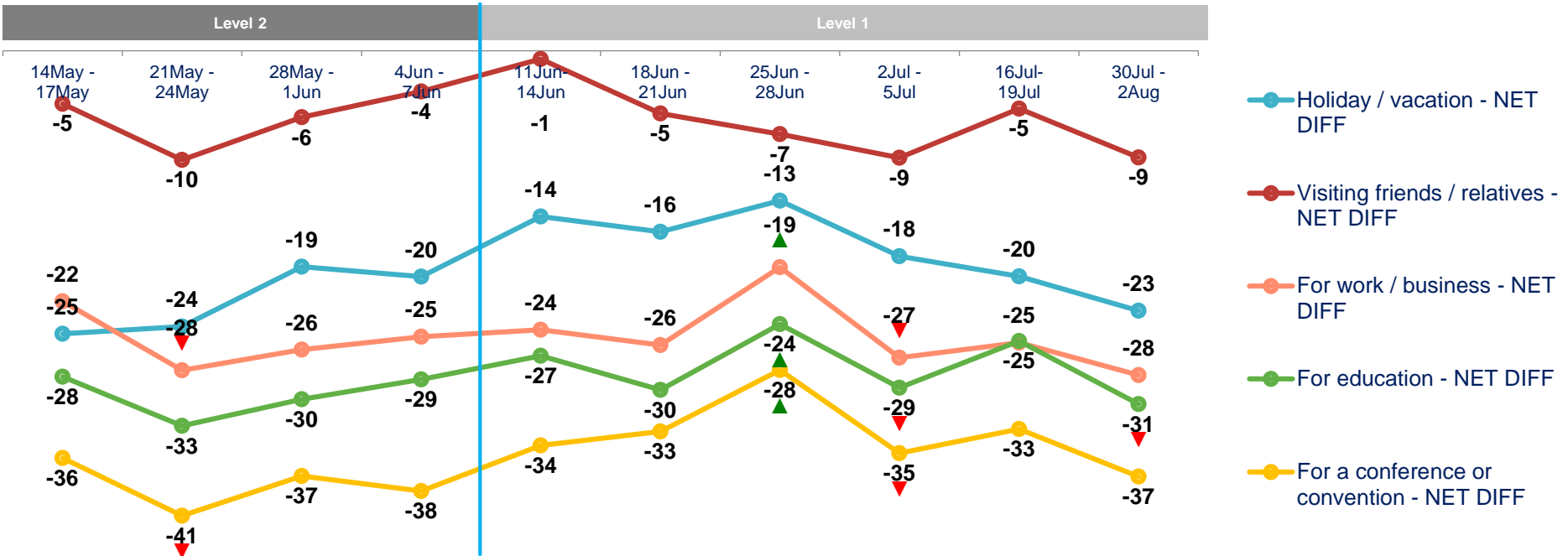
*Proportion saying that they are likely to make domestic journeys in the next six months*



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

# Wave 16 has seen a decrease in the projected growth of all tourism travel types for the next six months

## Intention to travel domestically



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

Base: all adults 15+ in New Zealand



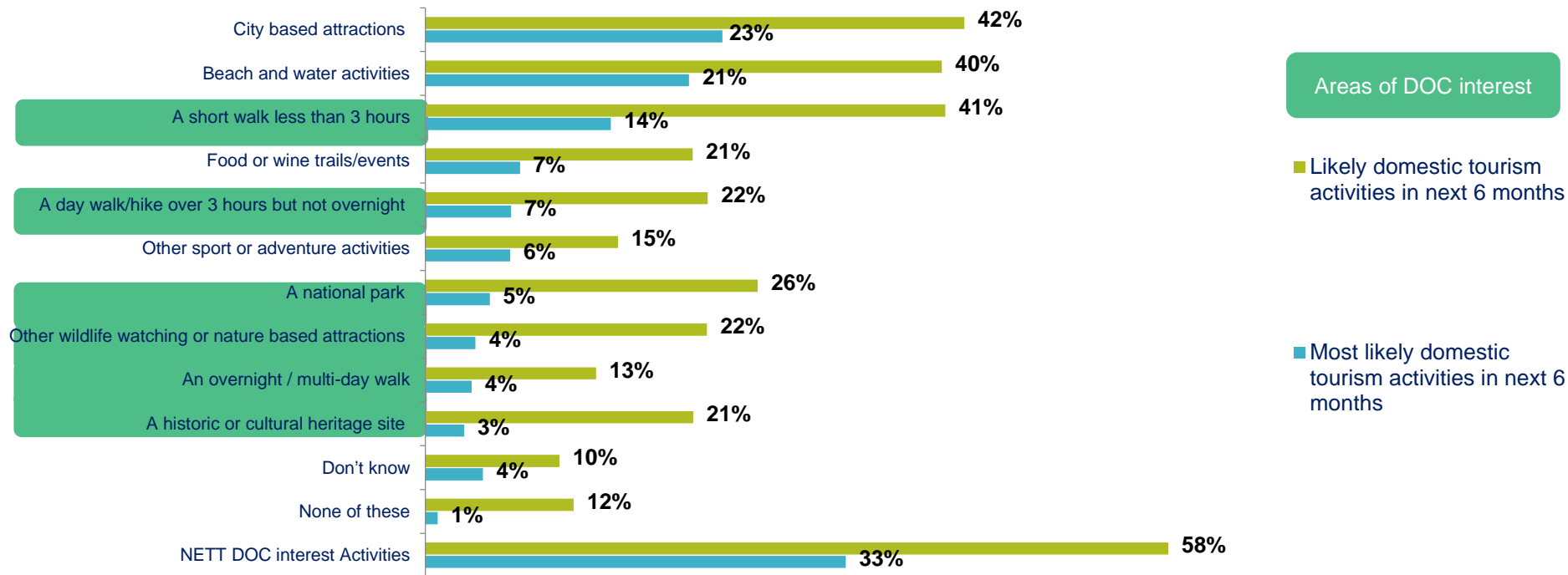
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Less taxing activities such as cities, beaches and short walks are the most planned tourism activities for New Zealanders

## Leisure and tourism activities



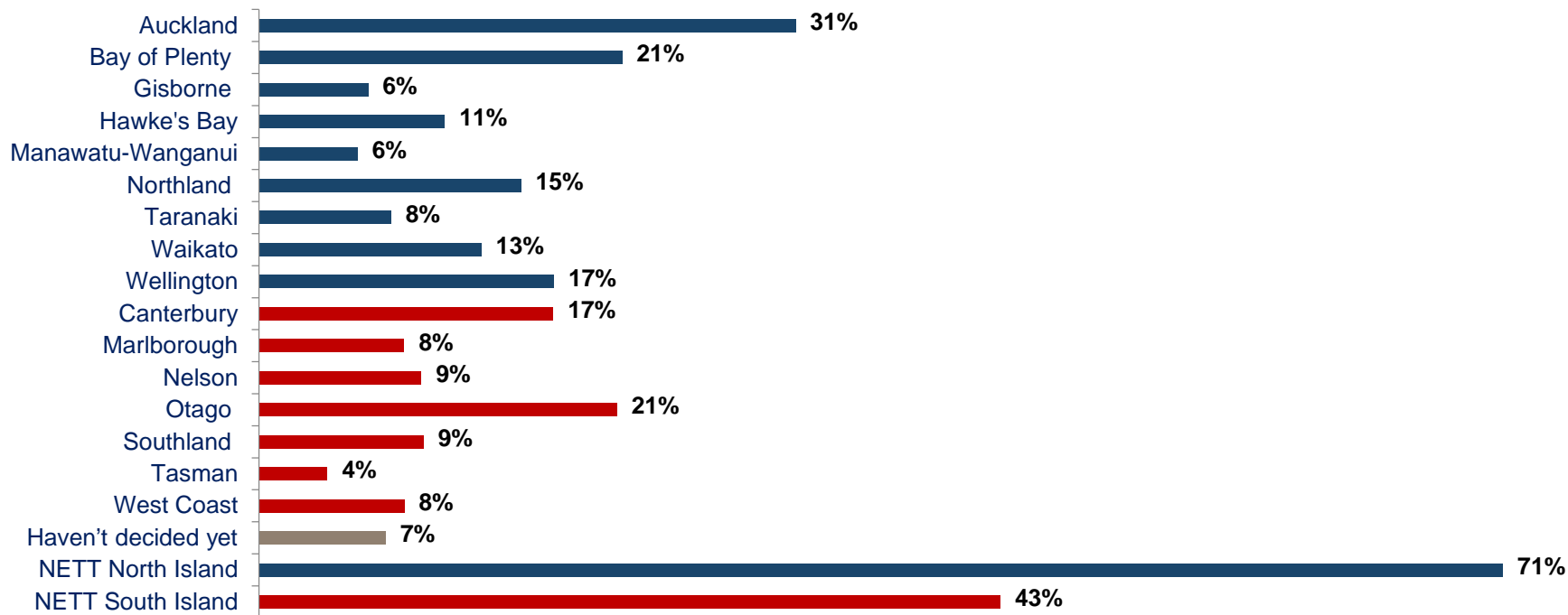
DOC1A. / DOC1B And which if any of the following, would you be likely to visit or take part in outside of the region you live in during the next six months? And thinking about the destinations and activities that you would consider, which one of these are you most likely, in the next six months, to visit or take part in?

Base: all adults 15+ in New Zealand likely to travel for a holiday or family visit in the next 6 months (n=953); likely to do any of the listed activities (n=758)



# Auckland, the Bay of Plenty and Otago are the most desired locations for the tourism activities New Zealanders are most likely to undertake

## Intended destinations for all leisure and tourism activities



DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?

Base: all adults 15+ in New Zealand with planning a specific activity (n=723)



# People from Wellington are more likely to be planning inter-island activities, but most activities are planned **within the home region**

## Intended destinations for all leisure and tourism activities

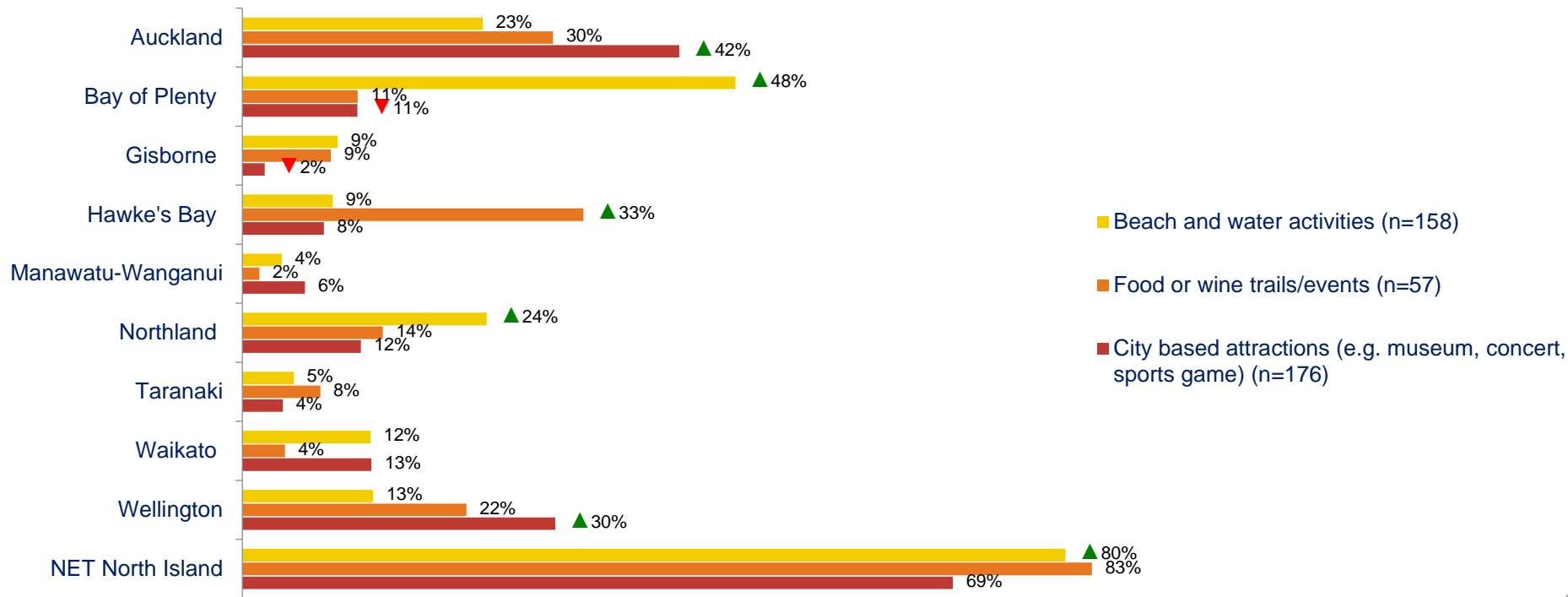
Likely destination of most likely domestic tourism activity		Region of residency								
		Total (qualified)	Auckland	Bay of Plenty	Waikato	Wellington	Canterbury	Otago	NET North Island	NET South Island
<b>Total (qualified)</b>	uB	723	190	94	100	108	71	65	561	162
<b>Auckland</b>	%	31%	<b>49%</b>	26%	21%	23%	15%	21%	36%	18%
<b>Bay of Plenty (e.g. Tauranga, Coromandel)</b>	%	21%	25%	<b>48%</b>	42%	14%	2%	9%	27%	5%
<b>Gisborne (e.g. East Coast)</b>	%	6%	9%	7%	3%	10%	3%	5%	8%	3%
<b>Hawke's Bay (e.g. Napier, Hastings)</b>	%	11%	12%	16%	9%	21%	5%	1%	14%	2%
<b>Manawatu-Wanganui</b>	%	6%	4%	5%	4%	14%	3%	1%	7%	2%
<b>Northland (e.g. Bay of Islands, Whangarei)</b>	%	15%	20%	16%	11%	5%	4%	22%	16%	12%
<b>Taranaki</b>	%	8%	10%	12%	7%	6%	2%	1%	9%	3%
<b>Waikato (e.g. Lakes, Rotorua)</b>	%	13%	10%	24%	<b>38%</b>	14%	6%	0%	16%	4%
<b>Wellington</b>	%	17%	16%	16%	12%	<b>30%</b>	14%	18%	18%	14%
<b>Canterbury (e.g. Christchurch)</b>	%	17%	8%	8%	10%	13%	<b>52%</b>	28%	8%	38%
<b>Marlborough</b>	%	8%	7%	8%	4%	9%	13%	7%	7%	12%
<b>Nelson</b>	%	9%	5%	5%	6%	13%	15%	14%	7%	15%
<b>Otago (e.g. Queenstown, Dunedin)</b>	%	21%	15%	8%	8%	21%	23%	<b>57%</b>	13%	38%
<b>Southland (e.g. Milford Sound, Fiordland)</b>	%	9%	8%	6%	7%	9%	7%	17%	8%	14%
<b>Tasman</b>	%	4%	2%	2%	0%	8%	10%	2%	3%	6%
<b>West Coast (e.g. Franz Josef or Fox Glacier)</b>	%	8%	4%	6%	4%	8%	20%	14%	5%	16%
<b>Haven't decided yet</b>	%	7%	6%	6%	8%	7%	11%	5%	8%	7%
<b>NET North Island</b>	%	71%	<b>89%</b>	<b>87%</b>	<b>81%</b>	<b>77%</b>	34%	42%	<b>85%</b>	38%
<b>NET South Island</b>	%	43%	30%	23%	24%	45%	76%	72%	29%	<b>77%</b>

DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?

Base: all adults 15+ in each region who are planning a specific activity; regions with <30 respondents planning a specific activity are not shown

# In the North Island the planned destinations for some of the more popular activities are largely where you would expect them to be

## Intended destinations for types of leisure and tourism activities – North Island

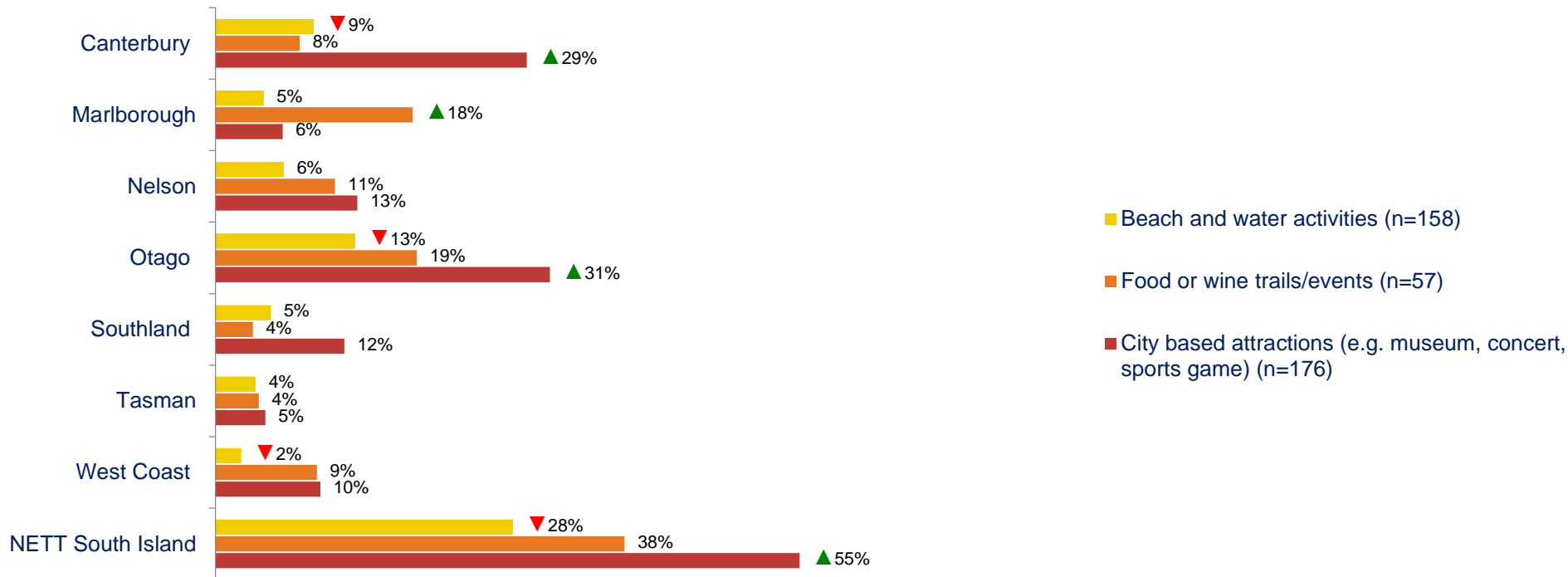


DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?  
 Base: all adults 15+ in New Zealand with planning each activity type



# This remains the case in the South Island, where activities largely reflect the distribution of related sites

## Intended destinations for types of leisure and tourism activities – South Island



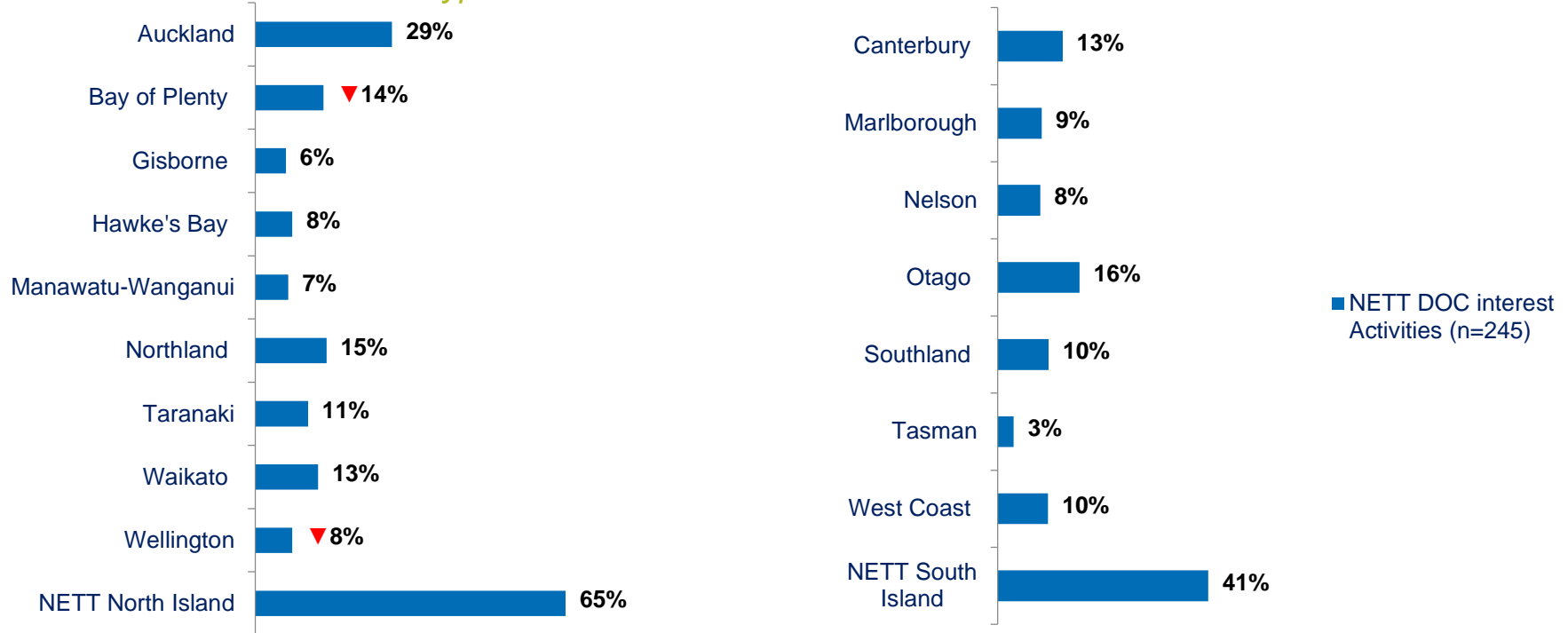
DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?  
 Base: all adults 15+ in New Zealand with planning each activity type





# Ultimately, locational interest in DOC activities is partly reflective of population density and distribution of national parks and reserves

## Intended destinations for types of leisure and tourism activities – North and South Island



DOC2 And if you were to visit or take part in the following activity in the next six months where do you think you will travel within New Zealand?  
Base: all adults 15+ in New Zealand with planning each activity type





## Section 8 – Access to commerce

# Key findings – access to commerce

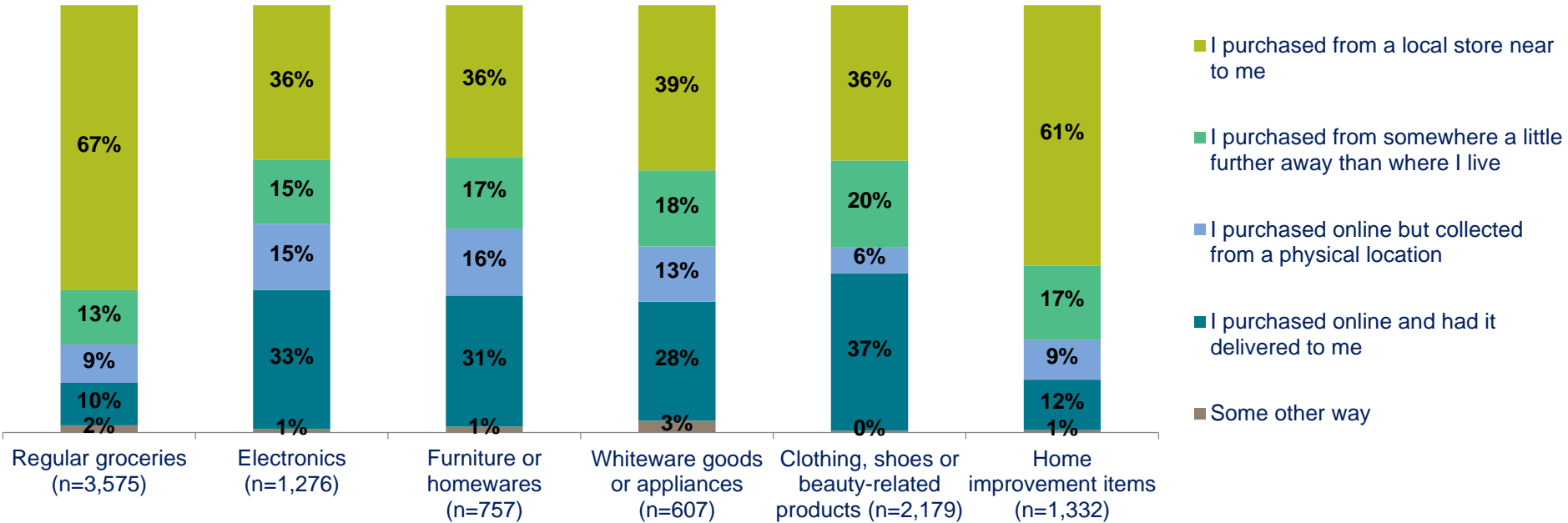
## Waka Kotahi objective – understanding behaviour change

- In order to understand the potential long term effects of changing travel behaviour we want to understand the ways in which New Zealanders are adapting to their circumstances and accessing the things they need and want.
- Early on in level 1, it was clear that although online shopping had filled a gap for people in many categories during lockdown there was a broad desire in most categories to get back to shopping in physical stores.
- However, wave 16 has revealed that in some categories this desire is less persistent than others, with the proportion intending to buy online increasing for the likes of electronics, groceries, whitewares and furniture.
- The increase in planned online delivery orders was particularly noticeable in consumer electronics, while click & collect grew most significantly in planned whiteware purchases.
- In spite of this, two categories have seen persistent growth in planned physical in store purchases. These are clothing, shoes and beauty, and home improvement items.



# During the various periods of lockdown, purchases in many categories shifted towards online channels, be they click and collect or delivery

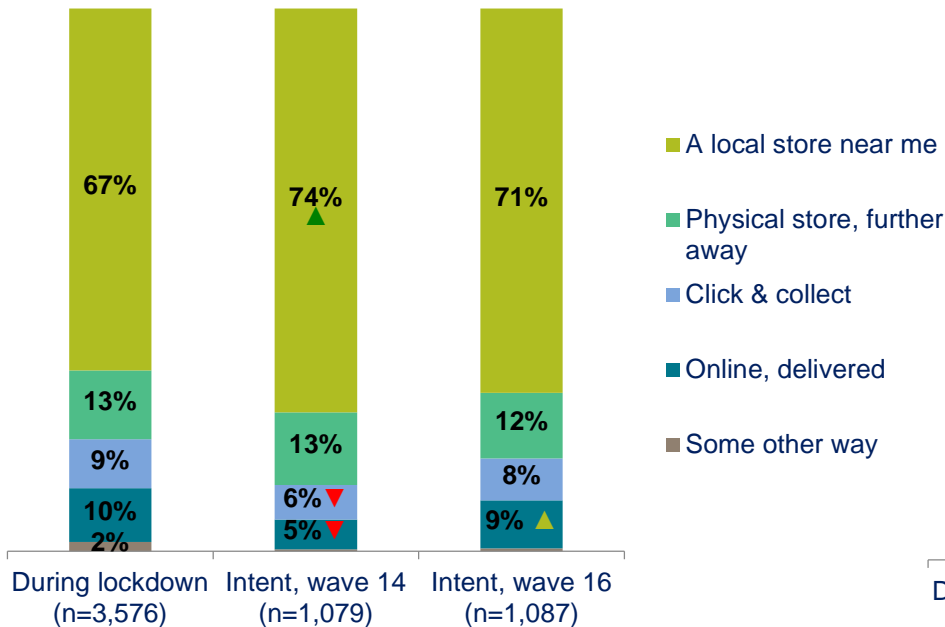
## Place of purchase during lockdown



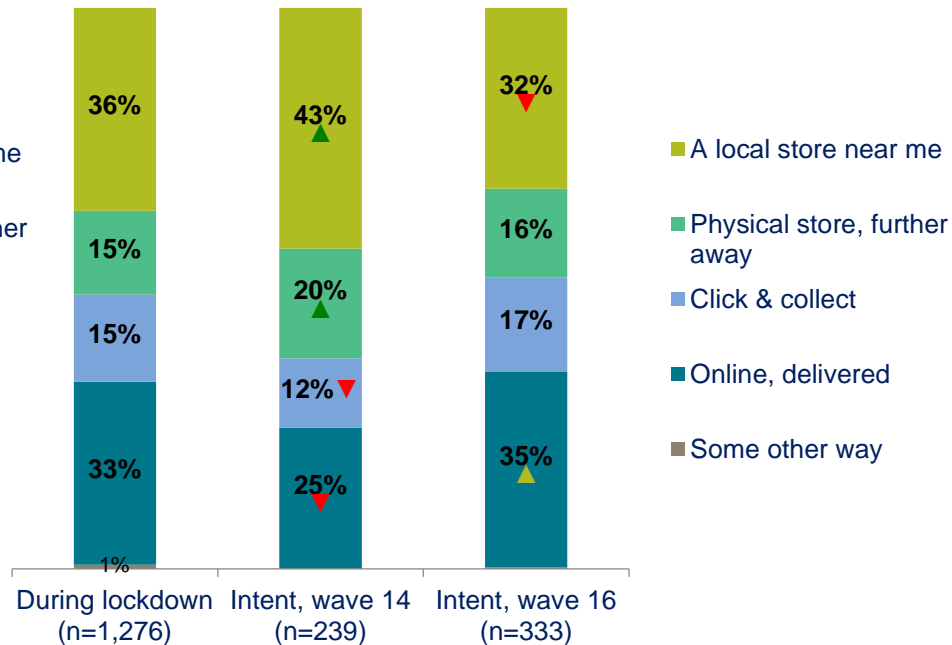
QNEWSHOP2: And in which way did you make those purchase(s)??  
 Base: Those who made a purchase (n=3,713)

# After initially appearing to shift back towards physical locations, wave 16 has seen a returning desire to purchase groceries and electronics online instead

## Grocery shopping – channel intention



## Electronics – channel intention

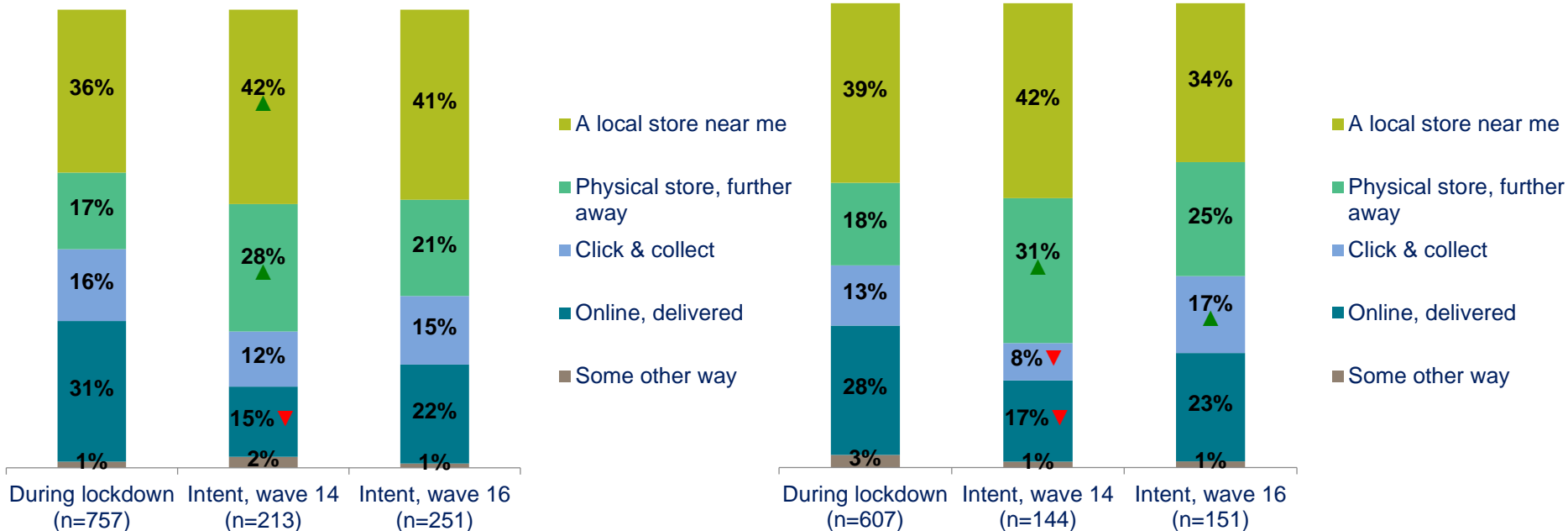


QNEWSHOP4: And how do you think you will purchase those items?  
 Base: Those who intend to make a purchase (n=3,240)

# Preference for physical store shopping has softened for furniture and homewares, while whitewares have seen a resurgence in planned click and collect purchases

## Furniture or homewares – channel intention

## Whitewares – channel intention



QNEWSHOP4: And how do you think you will purchase those items?  
 Base: Those who will make a purchase (n=693)



Indicates a statistically significant increase from previous time period

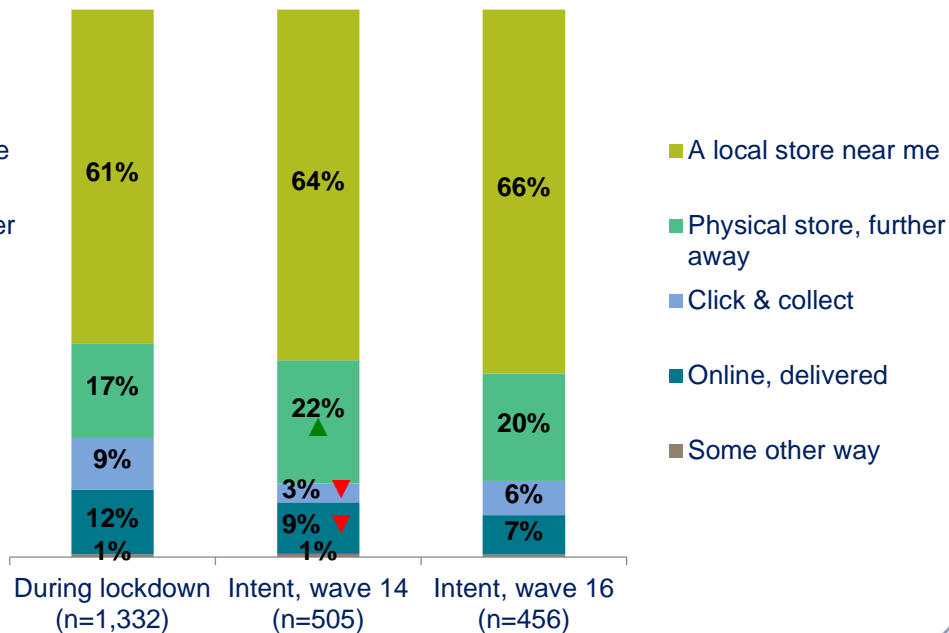
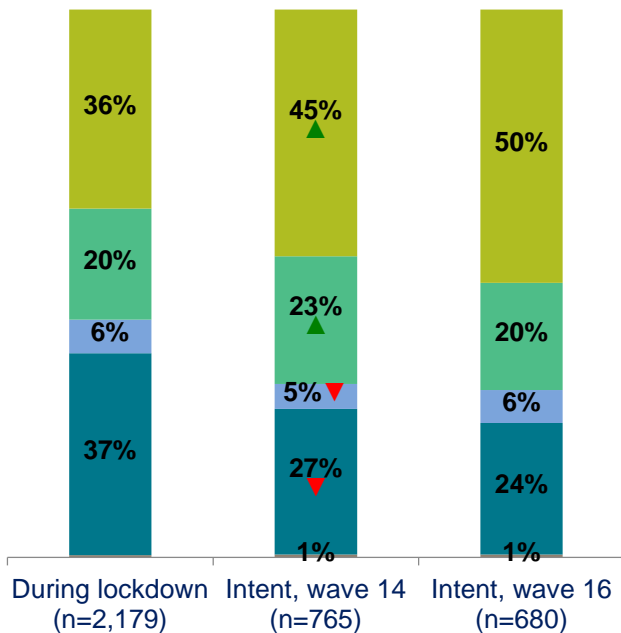


Indicates a statistically significant decrease from previous time period

# Clothing and home improvement items are the two categories where the desire to keep shopping in stores has proved most resilient

## Clothes, shoes and beauty shopping – channel intention

## Home improvement – channel intention



QNEWSHOP4: And how do you think you will purchase those items?  
 Base: Those who will make a purchase (n=2,170)



## Section 9 – Working from home



# Key findings – working from home

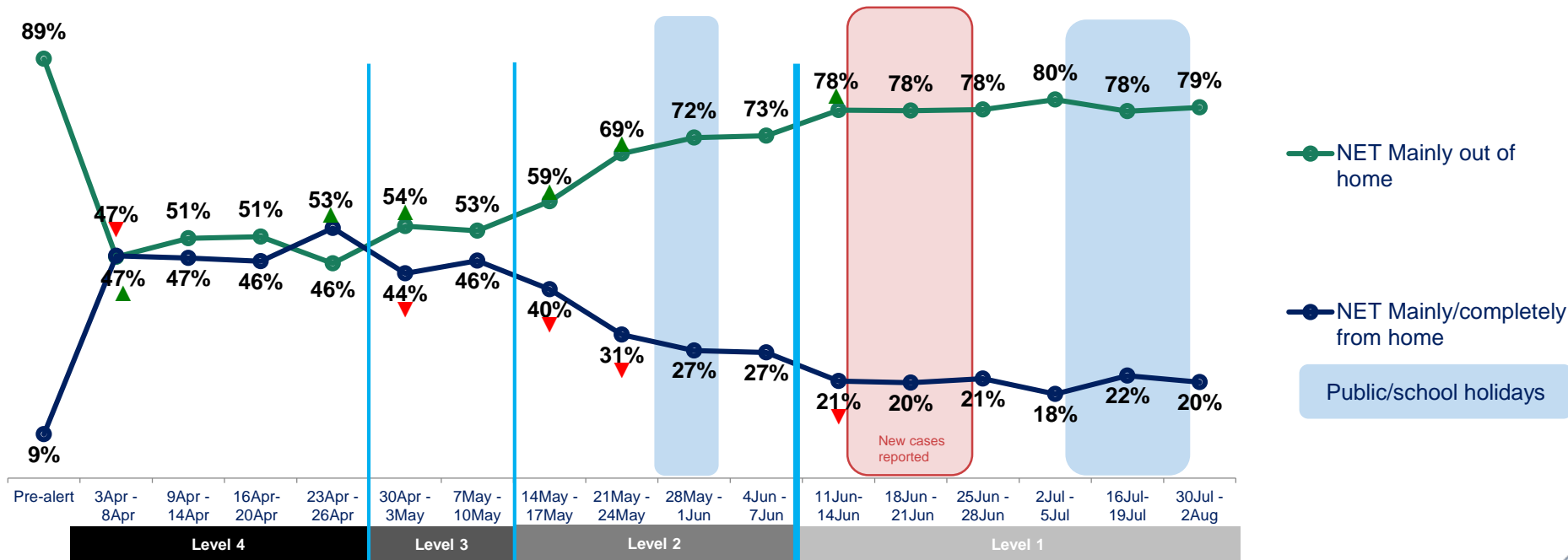
## Waka Kotahi objective – understanding behaviour change

- 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.
- At this point, one in five are working from home at least some of the time with no indication that this is changing under level 1 conditions.
- Some are splitting their time between working from home and another worksite, but there doesn't seem to be a particular concentration of days worked from home, such as the beginning or end of the week.
- Most commute level behaviours are and were impacted by people working more from home, with a marked decrease in the likes of car park usage, seasonal passes, car shares and cycling.
- Driving to work was most impacted, both positively and negatively, with 62% decreasing this activity and 11% increasing their driving to work. This resulted in a NET negative shift of 51% in the proportion driving to work during this time.



# The proportion working mainly or completely from home seems to have settled at around one in five, double the rate claimed before lockdown

*Proportion working in and out of home by survey wave*

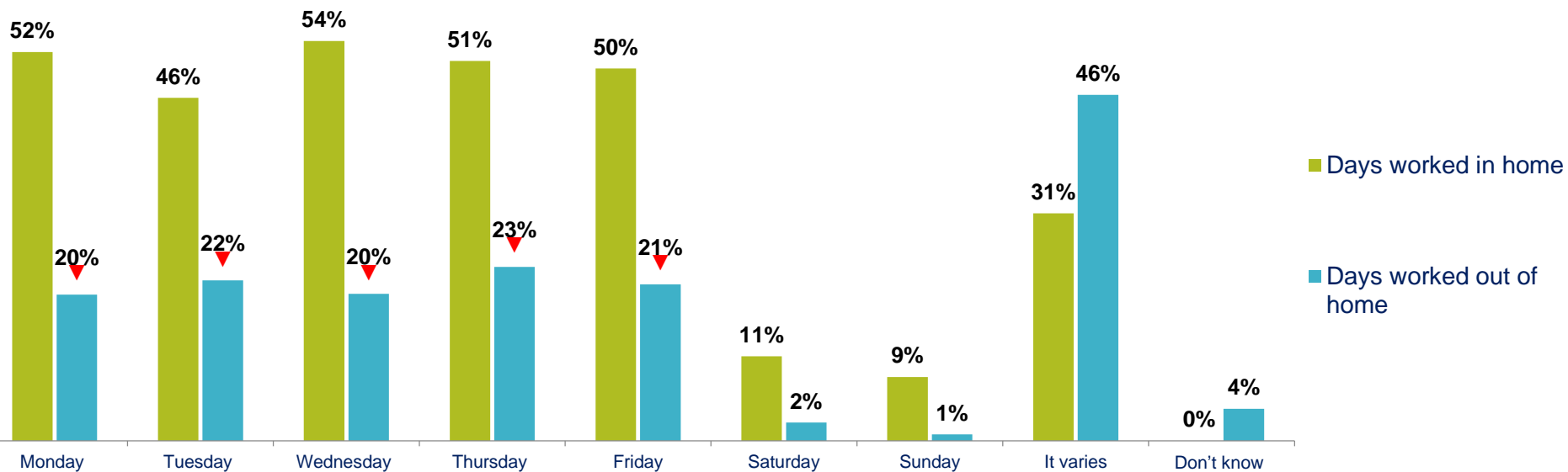


QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you *currently* work?

Base: all adults 15+ in New Zealand usually working

# Among those splitting their time between office and home, there is no indication of a particular concentration in terms of days worked from home

## Work from home vs out of home



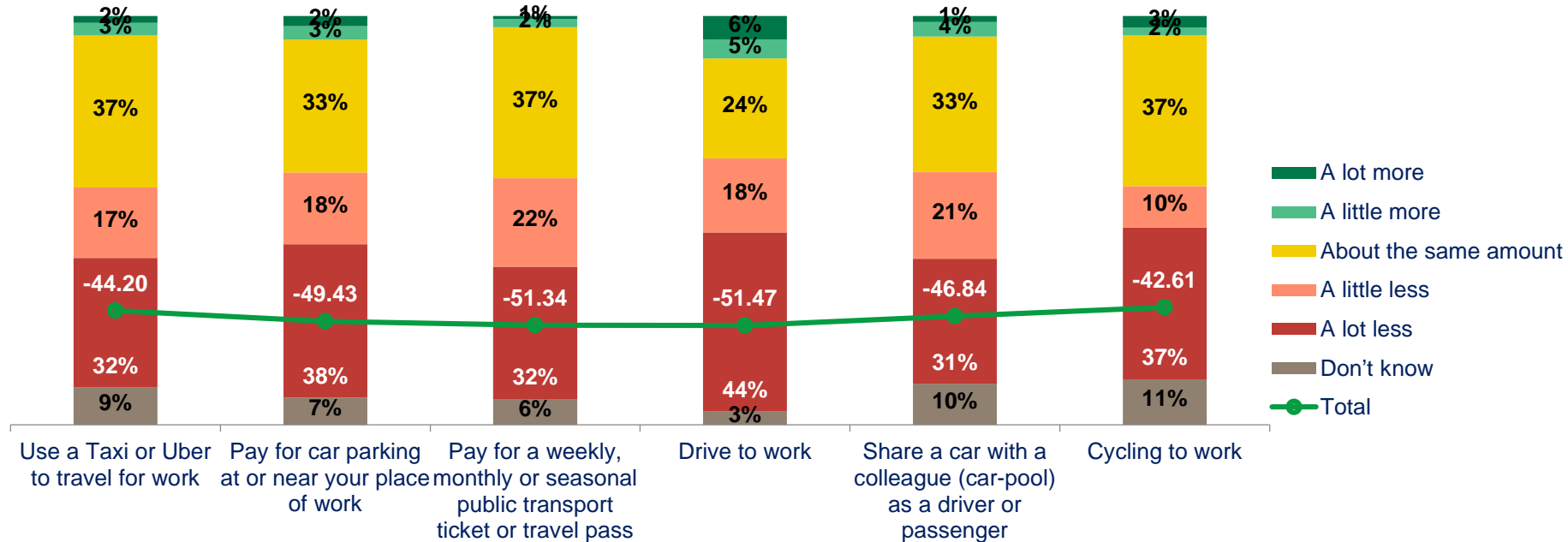
QWORK2E: On which days do you currently... ?

Base: All those currently working from home part of the time (n=74)



# Working from home has impacted differently on driving to work compared to other activities, experiencing both the biggest increases and decreases

## Change in travel behaviour when working from home



QWORK2F: Thinking now about the days that you work from home and how that might have changed your journeys to work. On balance, would you say that you have been doing each of the following more, less or about the same as you were before? Thinking now when you were working from home during level 2 or level 1 lockdown and how that might have changed your journeys to work. On balance, would you say that you were been doing each of the following more, less or about the same during that time as you were before lockdown? Base: Those who worked from home at least once (n=302)

