



Waka Kotahi COVID-19 transport impact

Fieldwork waves 1-23 core report

17 November 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.

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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 regular basis

- such as trip frequency and journey type changes.

To understand **why travel is changing** and evolving in response to COVID-19 on a regular 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 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 sample of ~n=1259 per wave, 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.

*For waves 1-14 fieldwork and reporting was undertaken weekly, for waves 15 and 16 fieldwork and reporting was undertaken bi-weekly, while wave 17 fieldwork and reporting was undertaken 3 weeks after wave 16 as fieldwork was brought forward from an intended monthly cycle due to an outbreak of COVID-19 community cases. Waves 17, 18, 19, 20 and 21 are weekly. Wave 22 took place 3 weeks after wave 21.

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) Regular* 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, mask ownership, etc.

Report notes (i)

Key information to note for this report

- This report is based on twenty-three waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of fieldwork for specific alert levels, 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' ie in February this year.
- At a total population level, significance testing indicated in this wave 23 report is based on a statistically significant shift of results between waves 1 to 23, as well as statistically significant shifts between combined alert levels.
- 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	Alert level 2
7	Thursday 14 May to Sunday 17 May	
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	
17	Thursday 20 August to Sunday 23 August	Alert Level 3 (AKL) Alert level 2 (Rest of NZ)
18	Thursday 27 August to Sunday 30 August	Alert Level 2.5 (AKL) Alert level 2 (Rest of NZ)
19	Thursday 3 September to Sunday 6 September	
20	Thursday 17 September to Sunday 20 September	Alert level 2 (AKL) Alert level 1 (Rest of NZ)
21	Thursday 24 th September to Sunday 27 September	
22	Thursday 15 th October to Sunday 18 th October	Alert level 1
23	Thursday 12 th November to Sunday 15 th November	

Report notes (ii)

Key transport terms and demographic groupings

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

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

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

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

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

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

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

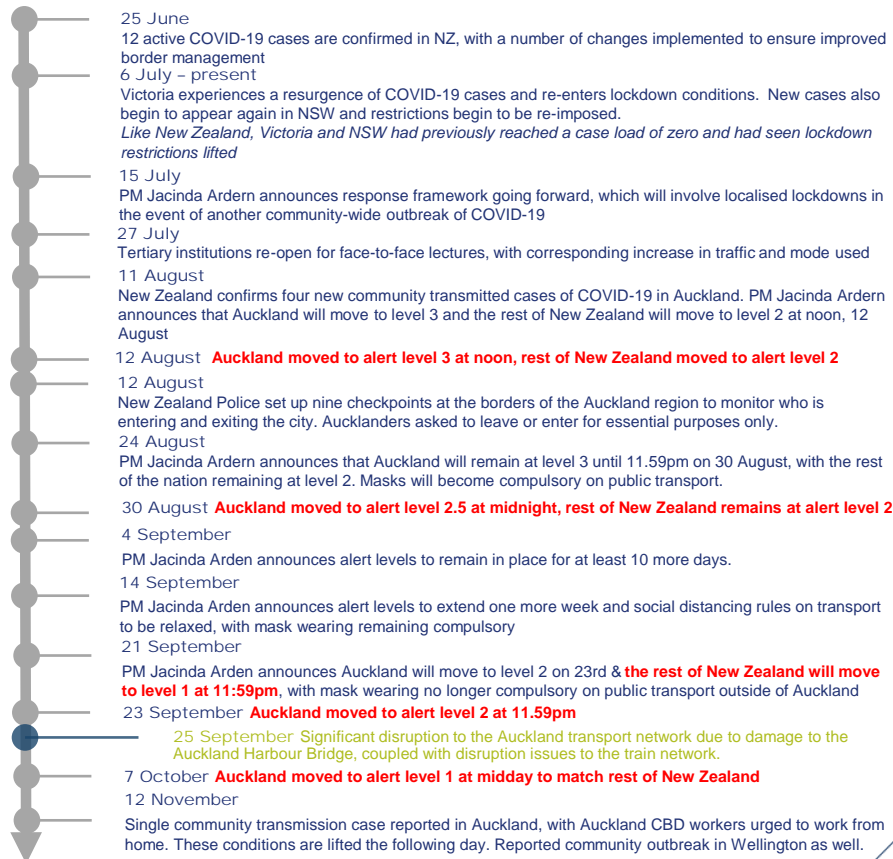
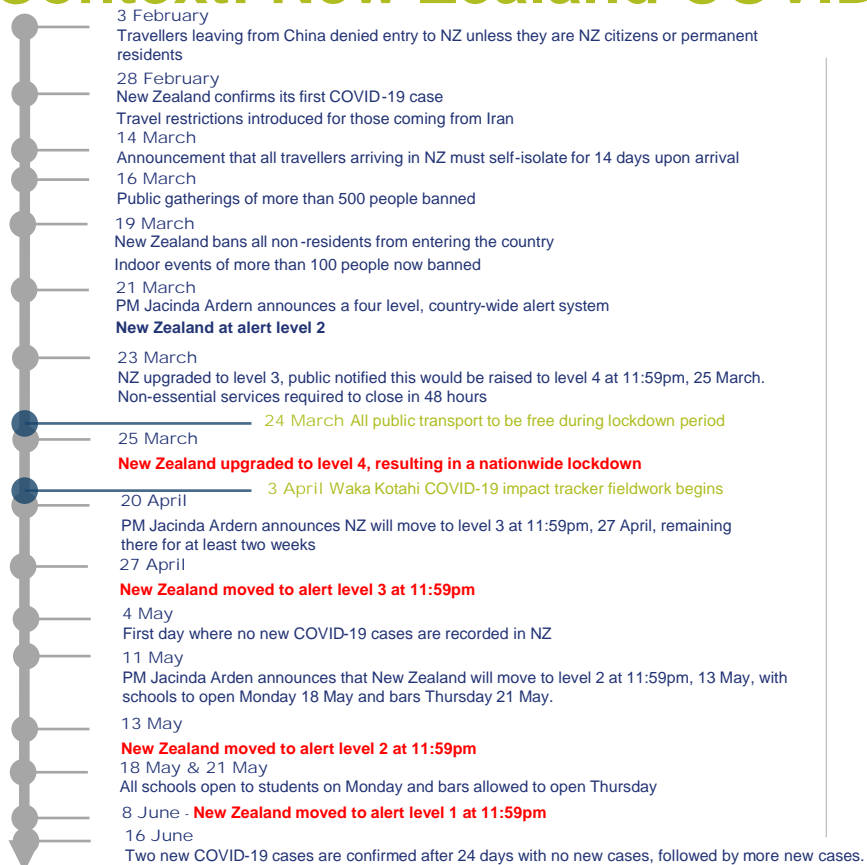
Sample structure and further definitions

	Definition	Waves 1-4		Waves 5-6		Waves 7-10		Waves 11-16		Waves 17-18		Waves 19-20		Wave 21		Wave 22		Wave 23	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MOE*	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	n=2,455	1.98	n=2,626	1.91	n=1,253	2.77	n=1,220	2.81	n=1,247	2.77
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	n=661	3.81	n=676	3.77	n=331	5.39	n=331	5.39	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=599	4.0	n=200	6.93	n=197	6.98	n=100	9.8	n=97	9.95	n=86	10.57
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0	n=200	6.93	n=217	6.65	n=100	9.8	n=101	9.75	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=1,129	2.92	n=311	5.56	n=357	5.19	n=175	7.41	n=156	7.85	n=165	7.63
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=601	4.0	n=200	6.93	n=200	6.93	n=100	9.8	n=100	9.8	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=607	3.98	n=200	6.93	n=208	6.79	n=87	10.51	n=93	10.16	n=100	9.8
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	n=683	3.75	n=771	3.53	n=360	5.16	n=342	5.3	n=365	5.13
Disability, Vulnerability and COVID-19**																			
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=866	3.33	n=284	5.82	n=323	5.45	n=132	8.53	n=130	8.6	n=142	8.22
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	n=584	4.06	n=617	3.95	n=317	5.5	n=299	5.67	n=305	5.61
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	n=266	6.01	n=293	5.73	n=162	7.7	n=131	8.56	n=141	8.25

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

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

Context: New Zealand COVID-19 timeline






Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1-23

Waka Kotahi COVID-19 transport impact tracker

- Wave 23 of fieldwork took place approximately one month after all of New Zealand had been under level 1 conditions. However, just ahead of fieldwork, community transmission cases were reported in Auckland and Wellington. It is possible that while this news may have impacted the levels of concern that New Zealanders expressed contextually, it has not negatively impacted their reported travel behaviour in the preceding seven days, because the news broke so late in that period and the outcomes with regards to further lockdowns or alert level increases were quickly reached.
- While the reporting of new community transmission cases has coincided with a statistically significant increase in concerns about infection and transmission, there are marked differences between regions in the trajectory of these concerns, which may also reflect the ending of wage subsidies or more salient concerns regarding the economic impact of a resurgence.
 - Despite being the site of one reported case, concerns about personal infection did not increase materially in Auckland although there was a significant rise in concerns about job loss.
 - In general, outside of Auckland there has been much more concern reported with regards to infection and transmission.
 - In Wellington, the other site of a community outbreak, infection concerns increased by a significant 12 points. Unlike the rest of the country, which saw concerns about the New Zealand economy at the lowest level so far, concern about the national economy is increasing in Wellington
- Reports of self-isolation are largely unchanged at the national level between October and November. Looking at regional comparisons, the difference in self-isolation behaviours seen during the split-level lockdown is now minimal with both Wellington and Auckland within four points of the national average.
 - Despite the cases being reported in Auckland and Wellington, stated mask adherence on Auckland public transport did not change between October and November, and only directionally increased for Wellington.
- Journeys to work are now at the highest level recorded since lockdown began, increasing a statistically significant seven points since October to be four points shy of pre-lockdown levels.
 - Other essential journeys, such as taking children to school, are already at pre-lockdown levels. Non-essential journeys continue to recover, as do longer distance visits to friends and family.
- At the national level, there has been a directional increase in reported weekly public transport usage, driven primarily by increases in reported bus usage.
 - Auckland and Wellington are both experiencing some similar shifts in public transport dynamics, with reported weekly usage rates back to normal in Wellington. Both cities saw a significant shift towards taxi and uber usage in November as well – note, there has been considerable competition among ride-share companies during the last few weeks.
 - Those staying off public transport in these cities are much more likely to cite worries about COVID-19 concerns and are more likely to return once lockdown alerts end or masks are compulsory on services.
- There appears to be some correlation between transport modes that have best recovered their image to match perceptions from the original level one and the significant gains in usage seen this wave.
 - Buses drove public transport increases this week and have recovered perceptions on all image statements except hygiene. The same is true for taxis / ubers, which recovered across the board and saw statistically significant increases in Auckland and Wellington.
 - Comparatively, trains and ferries fell short of initial level one scores on a number of statements and have not seen the same increase in reported weekly usage.
- At a national level, the proportion working from home for most of the week has significantly declined to the lowest level seen so far and is only six points higher than it was before the initial lockdown.
 - Commuters of all modes have been returning to their daily commute in the second level 1 period, but one in five public transport commuters are still working from home, compared to roughly one in 10 for active mode and private vehicle commuters.

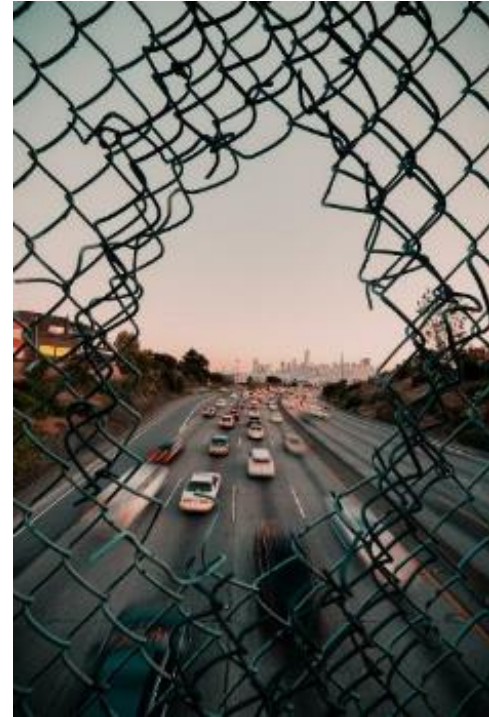
A woman wearing a blue jacket, a grey hat, and orange shoes is stepping out of the open door of a yellow and blue bus. She is carrying a patterned shopping bag. The bus has a yellow upper section and a blue lower section. A sign on the bus door reads "EMERGENCY DOOR CONTROL: PUSH BUTTON TO OPEN. DO NOT USE HANDLE OF DOOR IF NECESSARY." The background shows a white building and a clear sky.

Section 3 – Context

Key findings – context

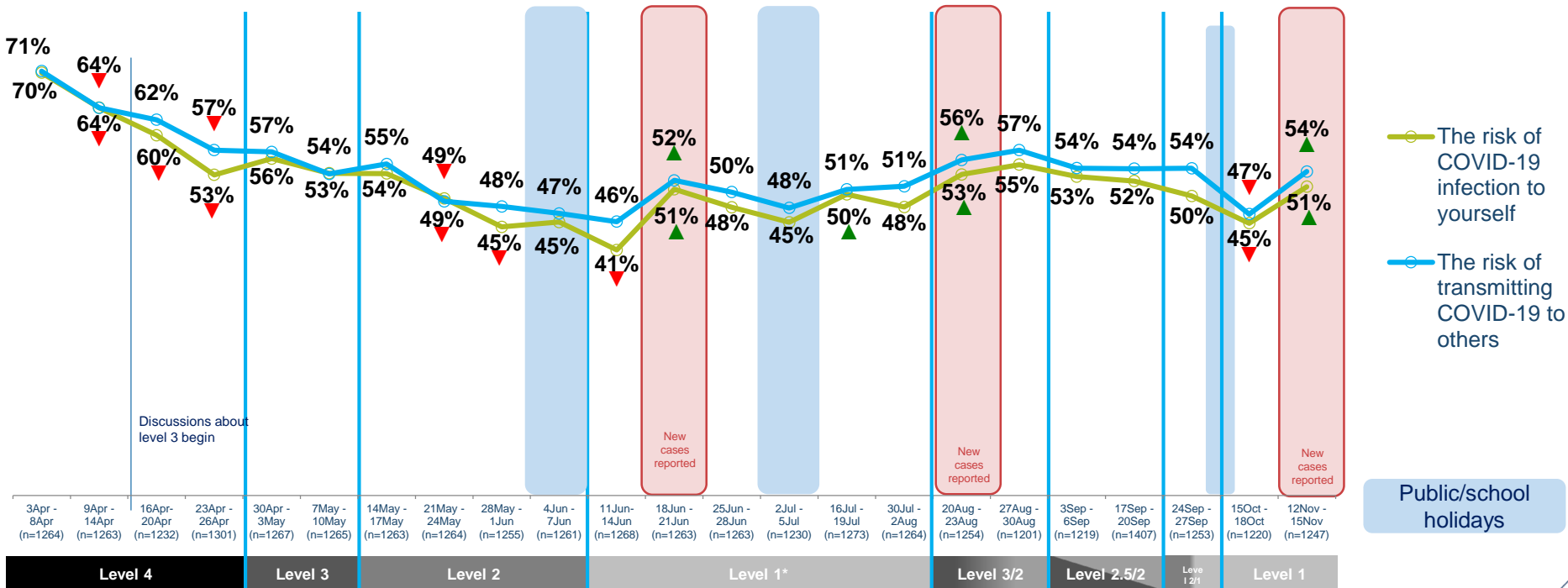
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- 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.
- The latest wave of fieldwork took place approximately one month after all of New Zealand had been under level 1 conditions.
- With the reporting of cases of community transmission in Auckland and Wellington just before fieldwork began, national concerns about COVID-19 transmission and risk of infection to oneself increased significantly.
- However, in Auckland concern about infection did not change from October although there was a directional increase in worries about transmission. Comparatively, those not in living in Auckland expressed significantly greater concern about both infection and transmission this wave.
- In particular, those in Wellington expressed more concern about being infected themselves than transmitting to others for the first time in several waves, with a 12 point increase in fears of infection risk.
- Nationally, economic concerns are generally falling away with concerns about the economy at the lowest level so far recorded. However, the Wellington region continues to see directional increases in this concern.
- Aucklanders are expressing greater economic anxiety in November than the rest of the country, with a significant increase in those worried about losing work.
- These concerns could in part be related to wage subsidies coming to an end.



Nationally, concerns about infection and transmission have rebounded in November, matching levels of concern seen in late September

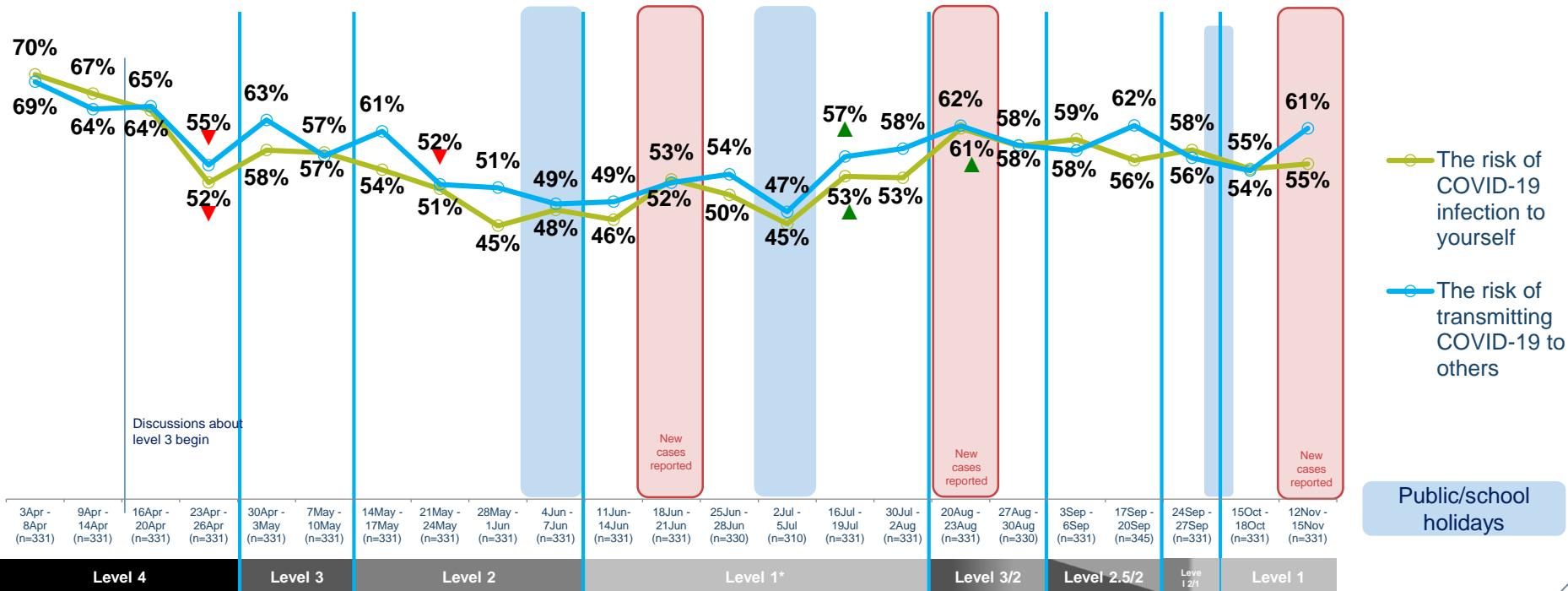
COVID-19 concerns (NETT all concerned)



QPTUSE3. How personally concerned are you about each of the following?
 Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1

Concerns about risk of infection didn't notably increase in Auckland, although there was a directional increase in concerns about transmitting to others

COVID-19 concerns (NETT all concerned) – Auckland



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

Base: all adults 15+ in Auckland *fieldwork frequency decreased from weekly during level 1



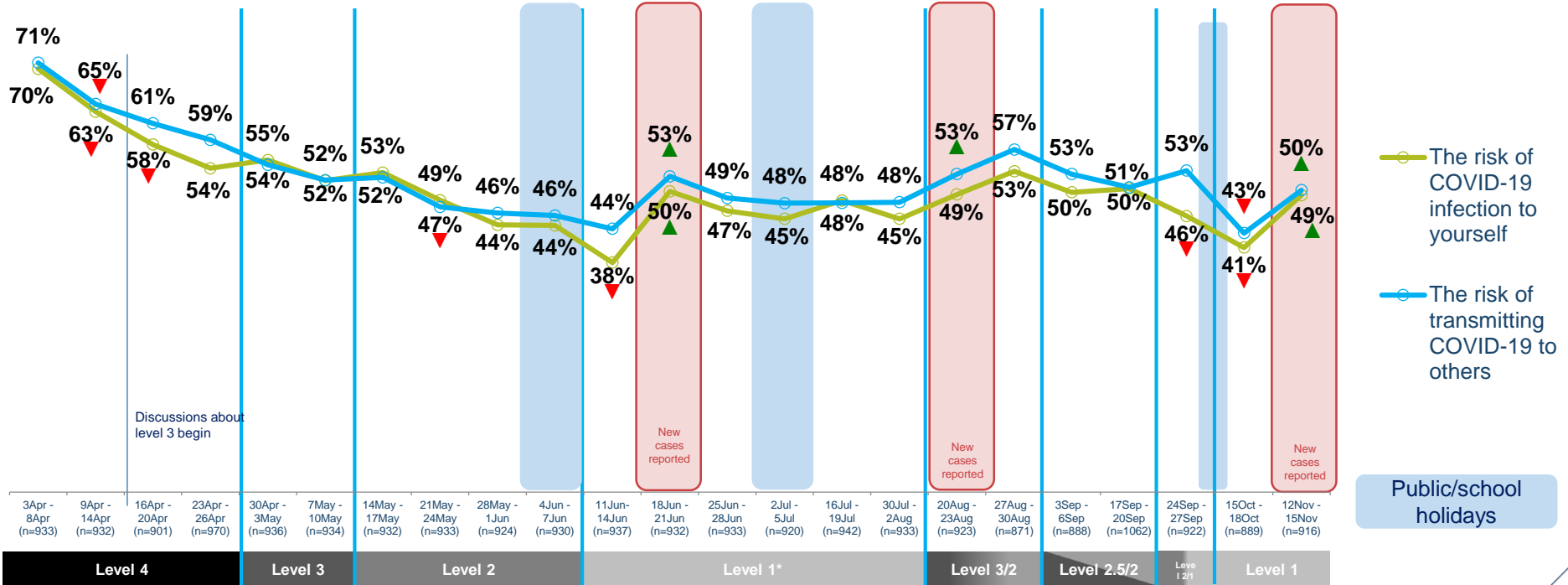
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

For all areas outside of Auckland, both transmission and infection concerns have jumped significantly, although they remain lower than those in Auckland

COVID-19 concerns (NETT all concerned) – rest of New Zealand (including Wellington)



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

Base: all adults 15+ not in Auckland *fieldwork frequency decreased from weekly during level 1



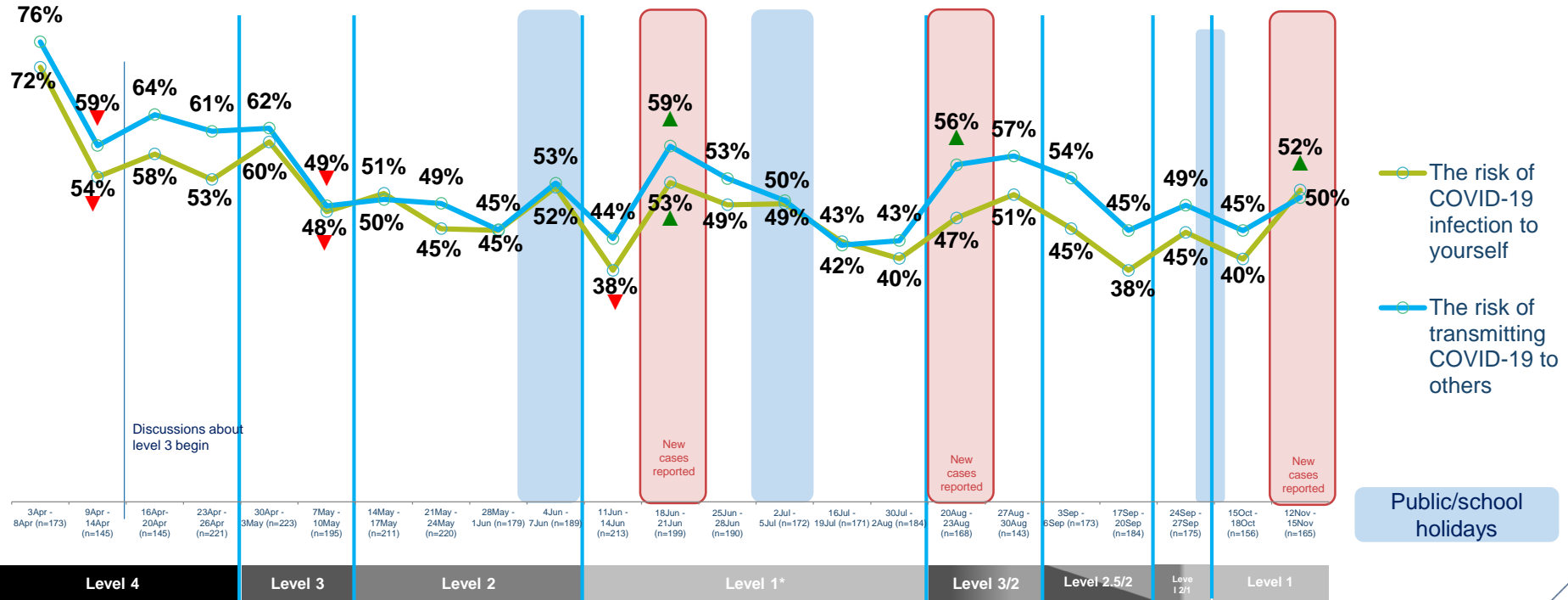
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

With community transmission also occurring in Wellington, November saw a significant 12 point increase in infection worries

COVID-19 concerns (NETT all concerned) – Wellington



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

Base: all adults 15+ in Wellington *fieldwork frequency decreased from weekly during level 1



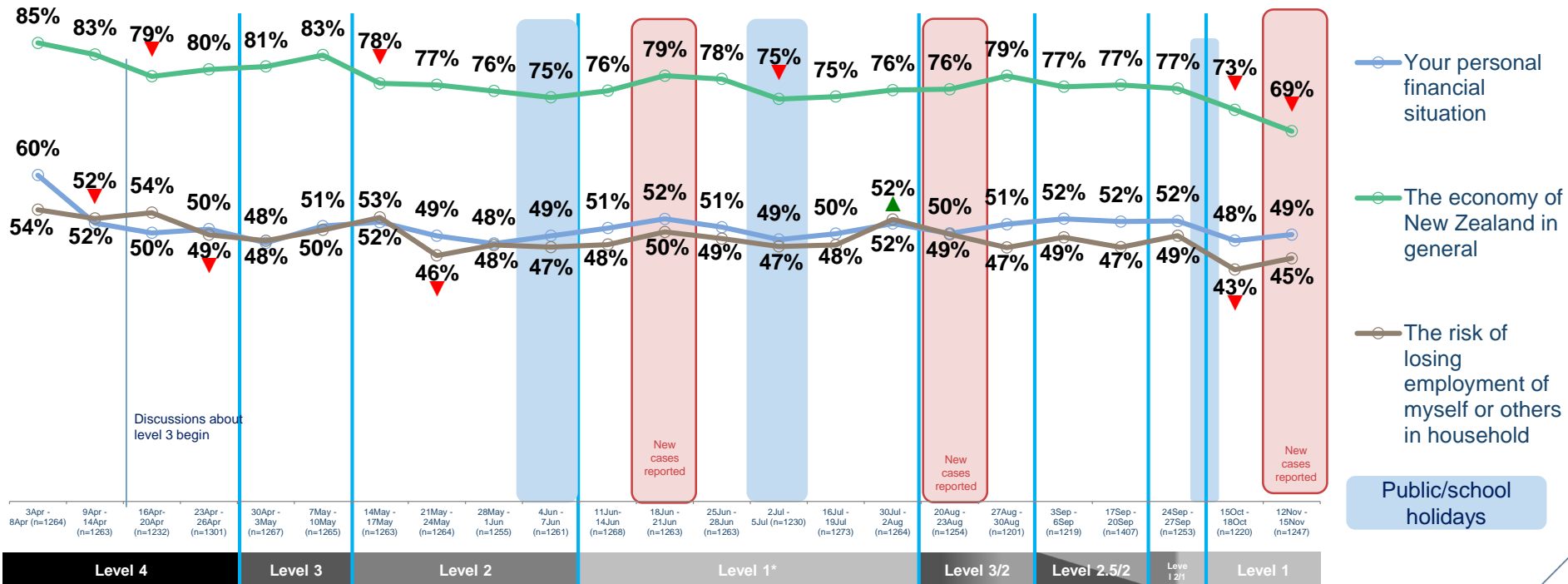
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Nationally, concerns about the economy of New Zealand have decreased significantly for the second wave in a row, although personal finances are largely unchanged

Economic concerns (NETT all concerned)



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

Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1



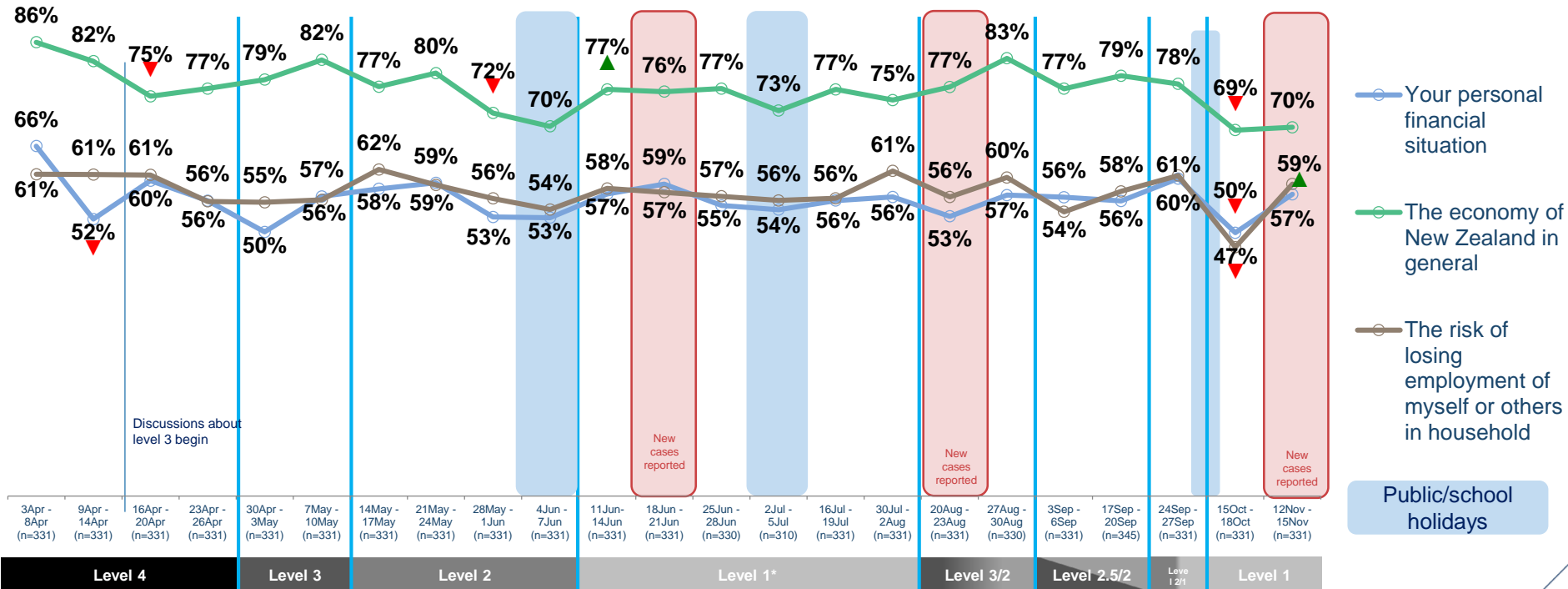
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Personal economic concerns are on the increase in Auckland, with worries about job loss in particular increasing by a statistically significant 12 points

Economic concerns (NETT all concerned) – Auckland



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

Base: all adults 15+ in Auckland *fieldwork frequency decreased from weekly during level 1



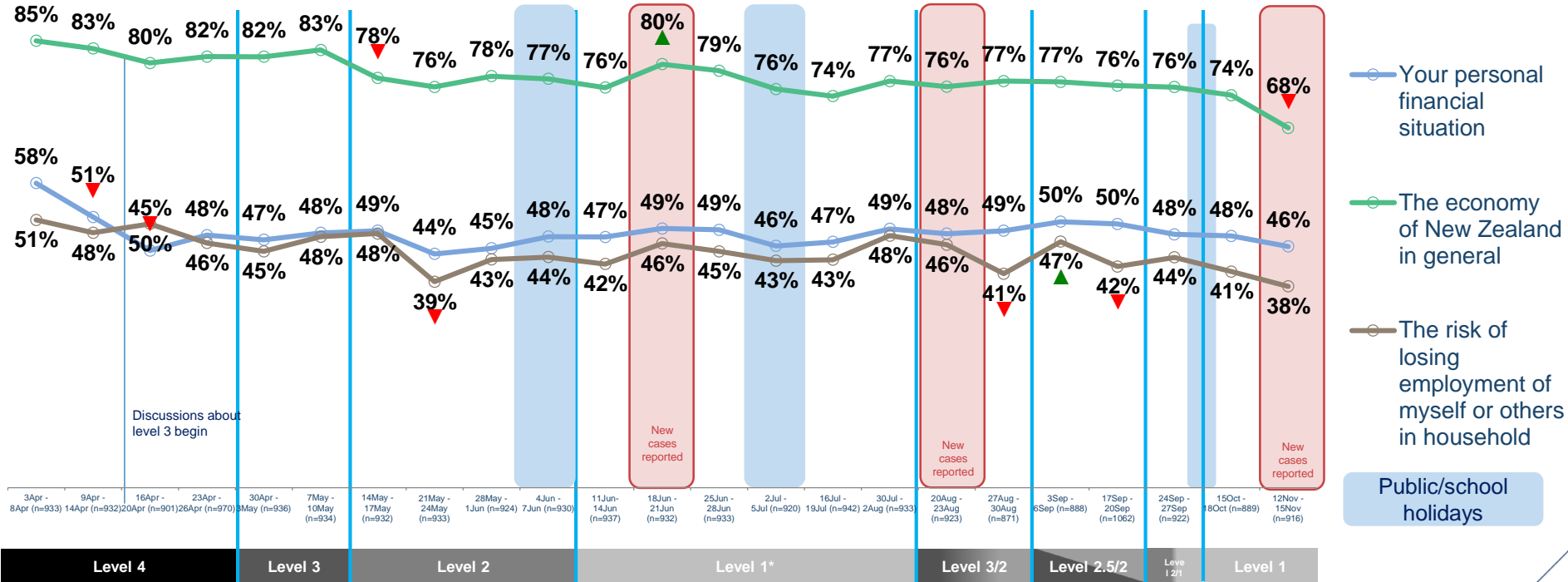
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Outside Auckland, economic concerns are weakening, with a directional decline in personal financial concerns and a significant fall in concern about the economy

Economic concerns (NETT all concerned) – rest of New Zealand (including Wellington)



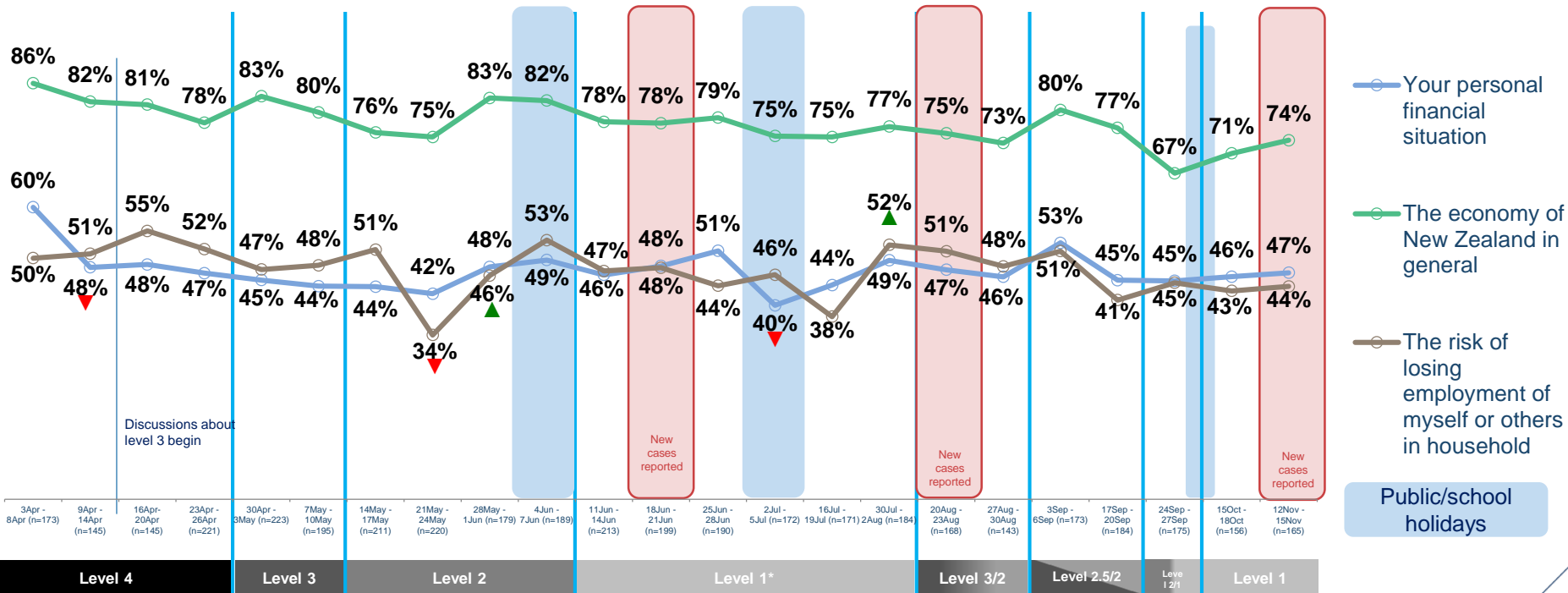
QPTUSE3. How personally concerned are you about each of the following?

Base: all adults 15+ not in Auckland *fieldwork frequency decreased from weekly during level 1



It is a different picture in Wellington, where concerns about personal finances are stable and concerns about the economy are directionally increasing

Economic concerns (NETT all concerned) – Wellington



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


Base: all adults 15+ in Wellington *fieldwork frequency decreased from weekly during level 1



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

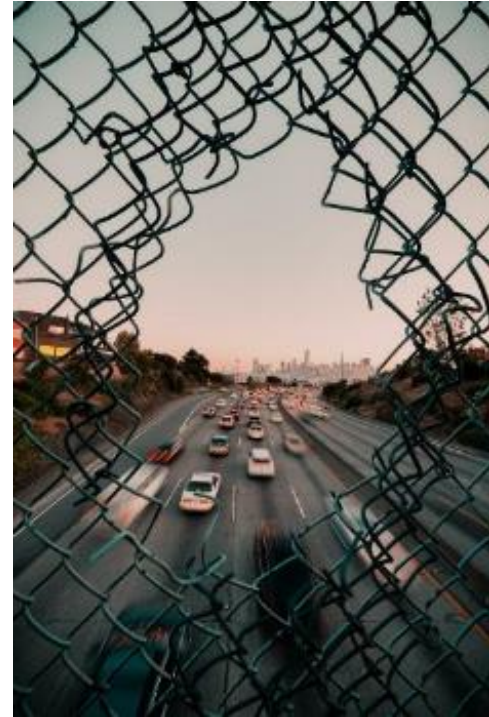


Section 4 – Behaviours

Key findings – behaviours

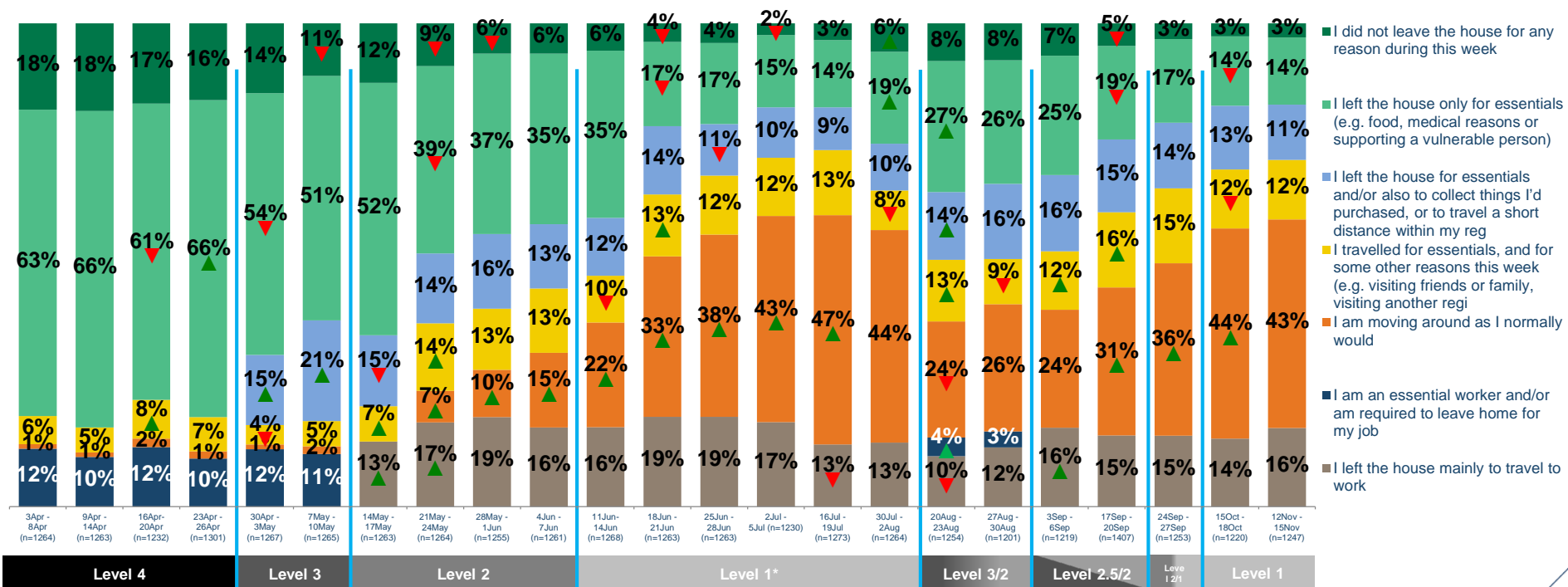
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- In light of changing attitudes and concerns around COVID-19 in the country, New Zealanders may change their behaviour in different ways to adapt to their situation. This includes moderating the amount of weekly travel undertaken or taking certain steps to protect oneself in transit, such as wearing masks.
- Reports of self-isolation are largely unchanged at the national level between October and November. In fact, the general profile of movement across New Zealand is almost identical to the previous wave and much alike that seen in the middle of the initial level 1 period.
- Looking at regional comparisons, the difference in self-isolation behaviours seen during the split-level lockdown is now minimal with both Wellington and Auckland now within four points of the national average.
- During the initial lockdown, self-isolation in the two cities adhered closely to the national average, but diverged significantly during the split-level lockdown, with self-isolation reaching 60% in Auckland where the alert level was higher, and not increasing at all in Wellington as it entered level 2.
- Despite the latest case being reported in the city, stated mask adherence on Auckland public transport did not change between October and November. In Wellington there was a directional shift towards stronger intent to wear masks, but not a statistically significant one.



Nationally, there has been no change of note in isolation behaviours between October and November, with the national profile much like that seen during the first level 1

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 *fieldwork frequency decreased from weekly during level 1



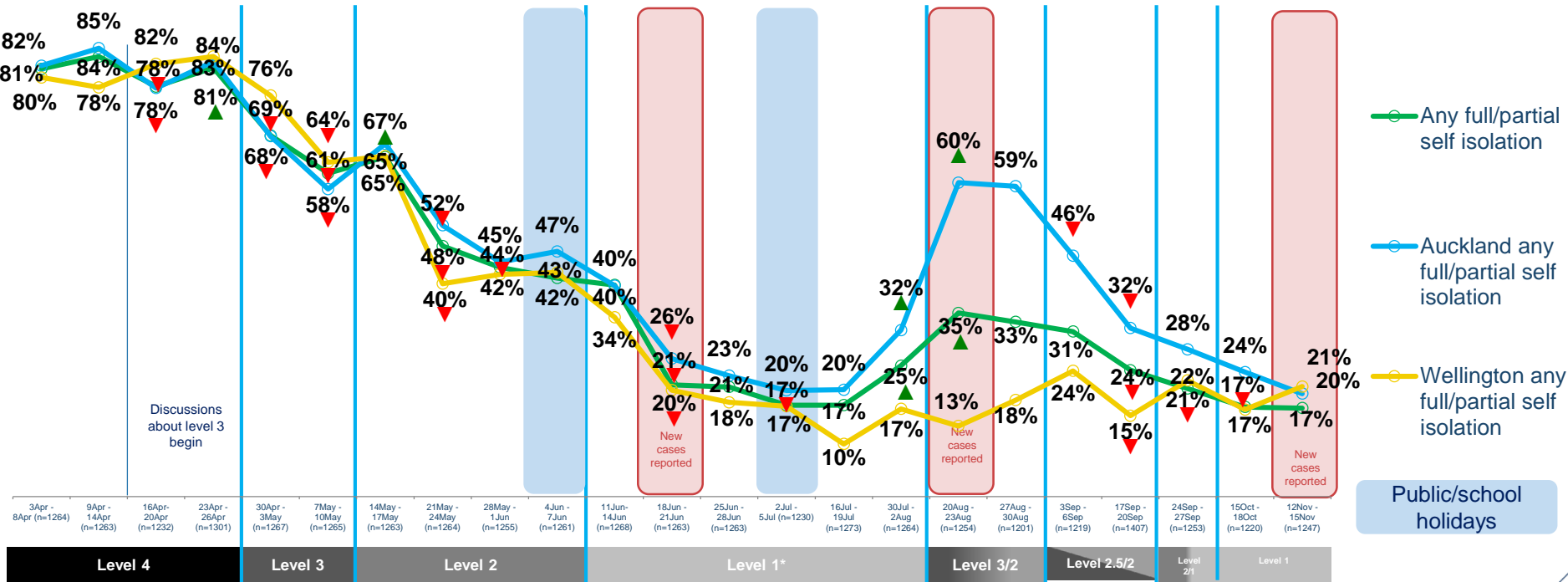
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Since the initial level 1, Wellington self-isolation has tracked lower than national average but is now higher than the national average

Self-isolation over time



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 *fieldwork frequency decreased from weekly during level 1



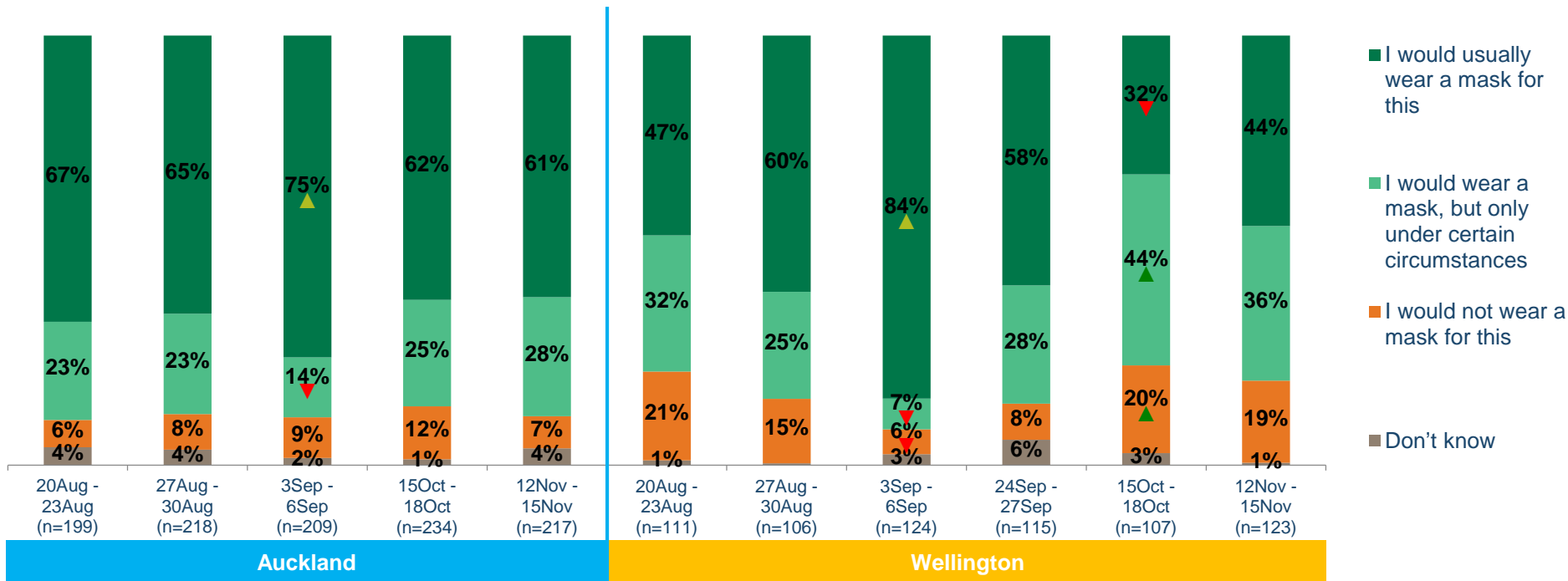
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Following the announcement of a community transmission in Auckland, stated mask adherence remained stable in the city, although it directionally increased in Wellington

When travelling on public transport (eg bus, train or ferry)



QMASK2A. Under the current alert level in your area, when doing the following activities which statement applies to you... When travelling on public transport (eg bus, train or ferry)

Base: all adults 15+ in New Zealand who would normally do this activity

NOTE: question suspended during times that masks were compulsory on public transport



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

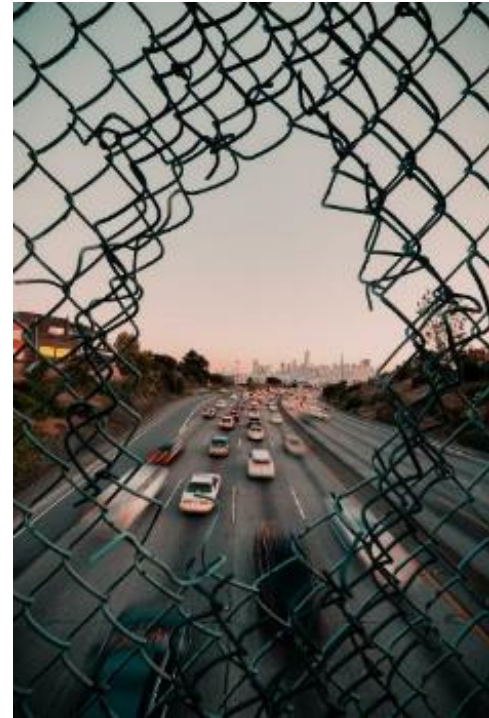
A woman wearing a blue jacket, a grey hat, and orange shoes is stepping out of the open door of a yellow and blue bus. She is carrying a patterned bag. The bus has a yellow upper section and a blue lower section. A sign on the side of the bus reads "EMERGENCY DOOR CONTROL: PUSH BUTTON TO OPEN. DO NOT USE HANDLE OF DOOR IF NECESSARY". The background shows a building and a clear sky.

Section 5 – Local and domestic journeys

Key findings – local and domestic journeys

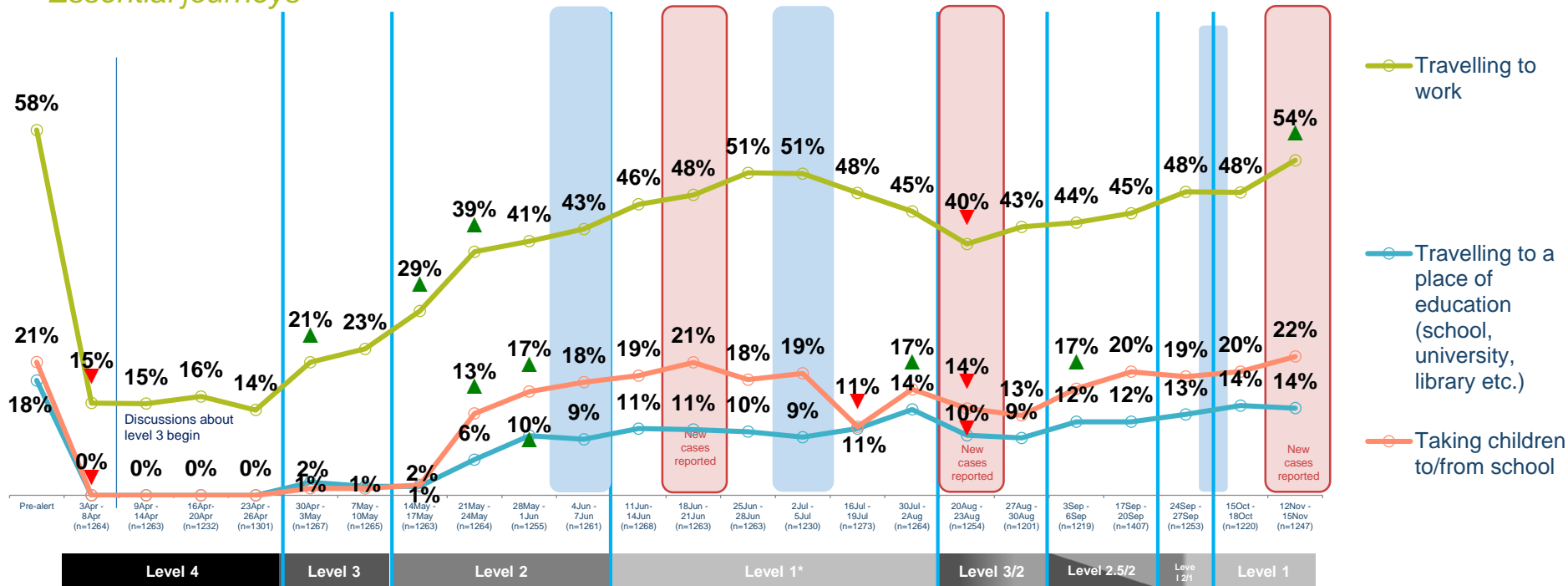
Waka Kotahi objective – how is travel changing?

- 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.
- Most daily essential journeys are now happening at roughly the rate they did during the initial level 1 period. While travelling to work hasn't yet matched pre-lockdown stated rates, it increased significantly to the highest level recorded since lockdown and is now only four points short of rates reported from the pre-alert period.
- Non-essential journeys are, for the most part, back to the rates they were at during the initial level 1 period following several waves of steady increases.
- The more prominent inter-regional domestic journeys saw another increase this wave, with a statistically significant increase in visits to friends and family and a continued steady increase in reported holidays.
- Long-distance trips for other purposes continue to take place at a much lower rate, with a lot of variation from wave to wave.



The proportion of people saying they travelled to work is now at the highest point recorded with a significant seven point increase from October

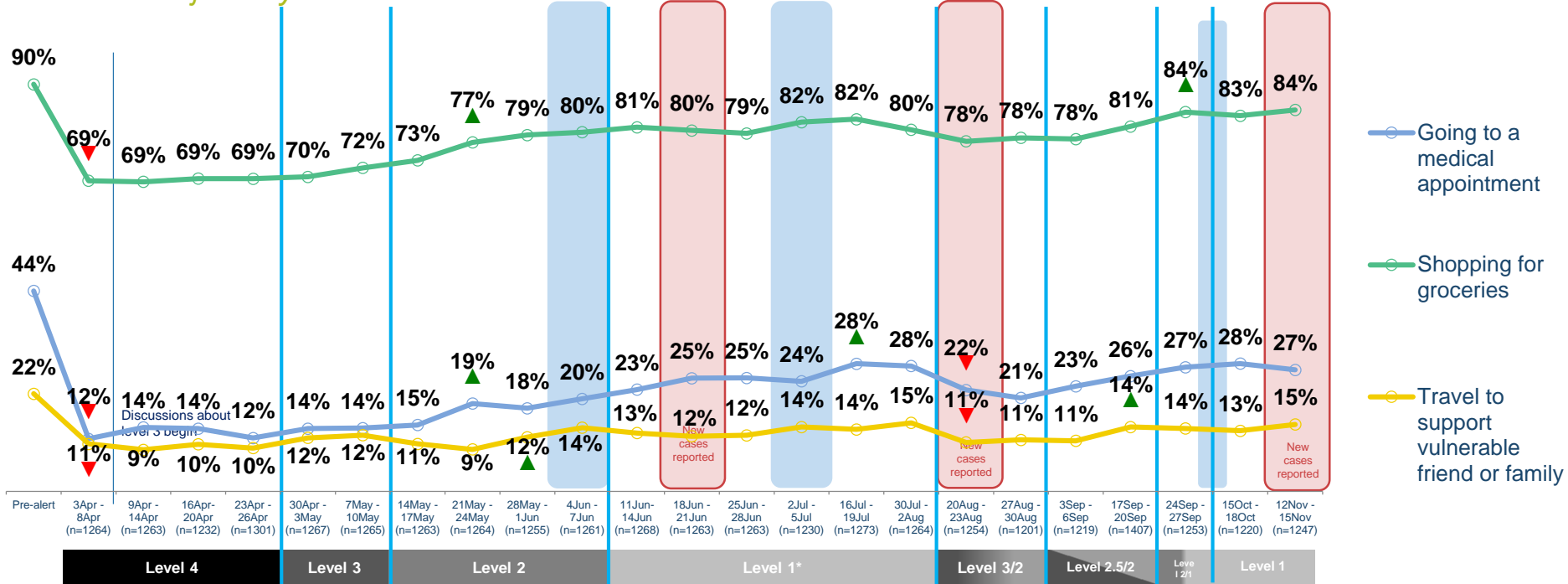
Essential journeys



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg 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 – 20 (n= between 1,230 – 1,300)

Those journeys that are generally taken less often are occurring at a roughly stable rate in November

Essential journeys

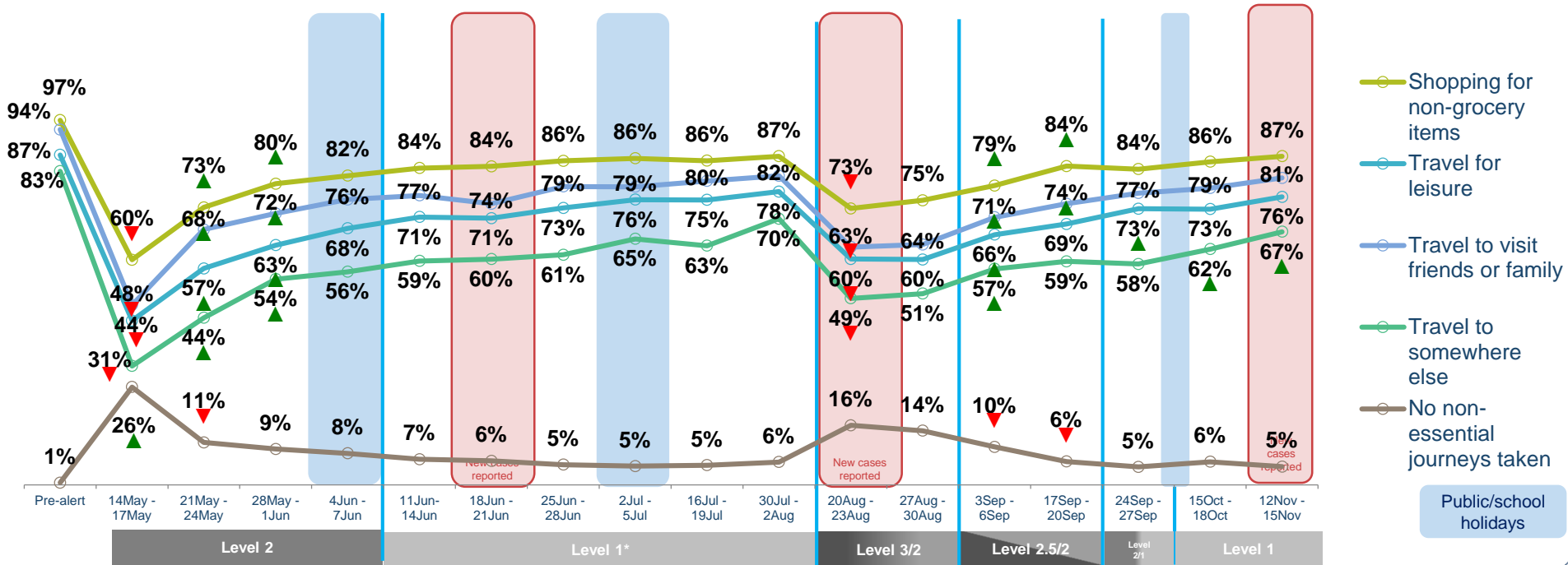


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 20 (n= between 1,230 – 1,300)



The rate of reported non-essential journeys continues to increase at a stable rate and now roughly matches the rates seen in the initial level 1 period

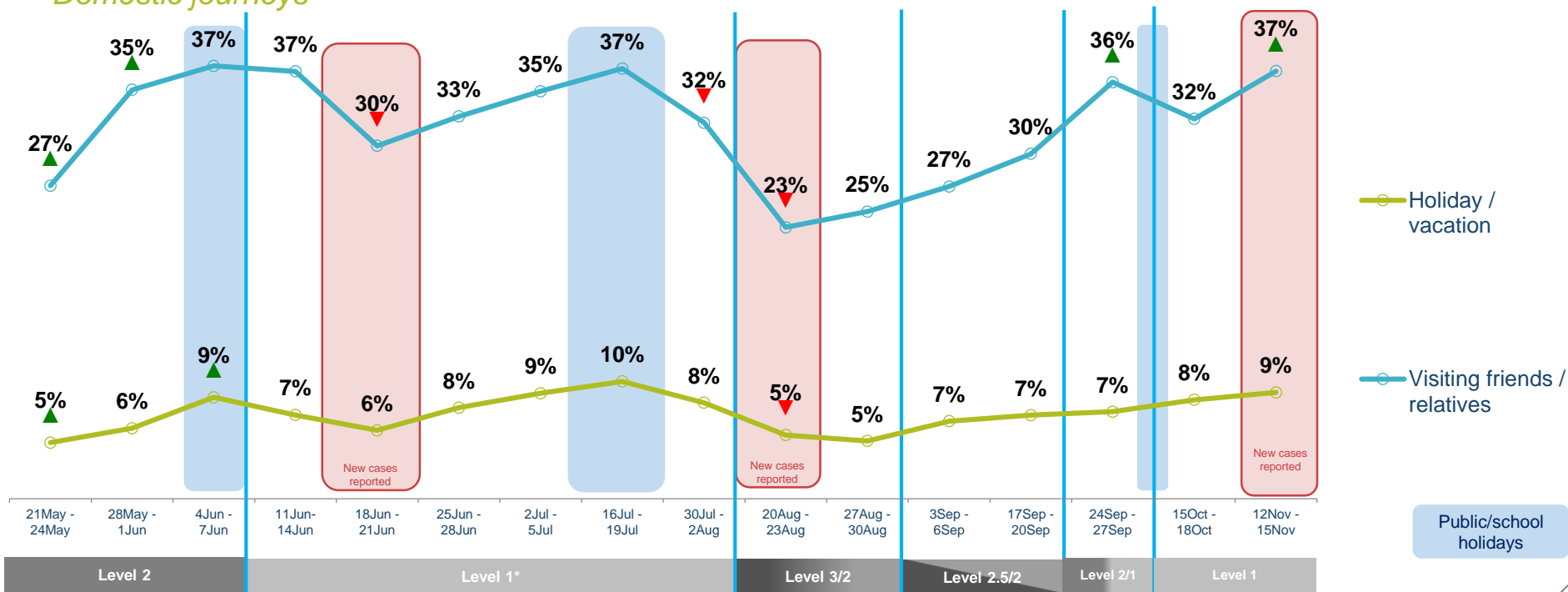
Non-essential journeys



QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
 Base: all adults 15+ interviewed during level 2, level 1, level 3/2 and level 2.5/2 in Auckland (c. 1,200 per wave)

There has been a significant increase in the proportion reporting longer distance domestic journeys to see friends and family, with holidays increasing directionally

Domestic journeys

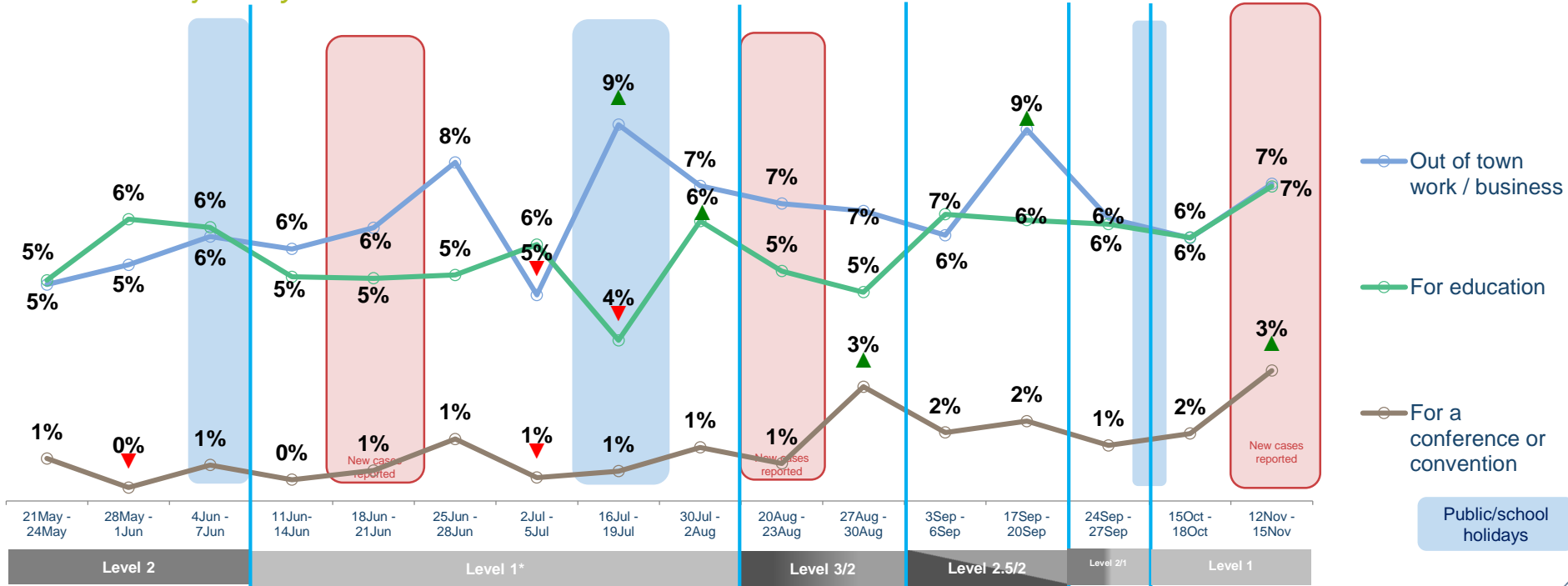


QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?



Other types of long-distance domestic journeys continue to occur at very low rates, with a significant increase in reported conference trips this wave

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?



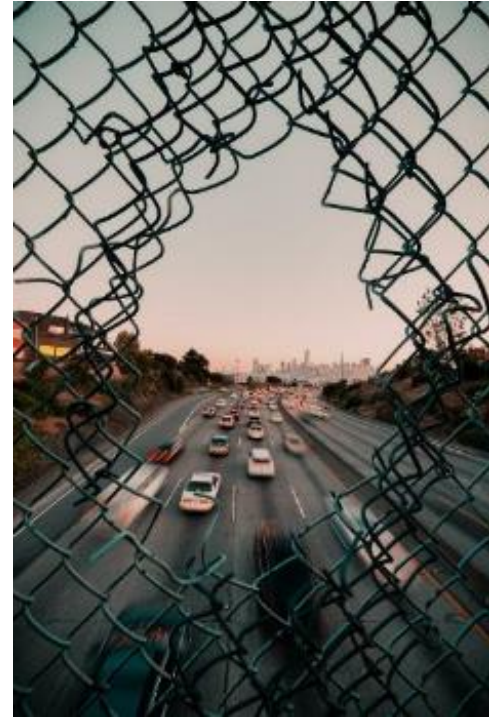
A woman wearing a blue jacket, a grey hat, and orange shoes is stepping out of the open door of a yellow and blue bus. She is carrying a patterned bag. The bus has a yellow upper section and a blue lower section. A sign on the bus reads "EMERGENCY DOOR CONTROL: PUSH BUTTON TO OPEN. DO NOT USE HANDLE OF DOOR IF NECESSARY". The background shows a white building and a clear sky.

Section 6 – Modal changes

Key findings – modal changes

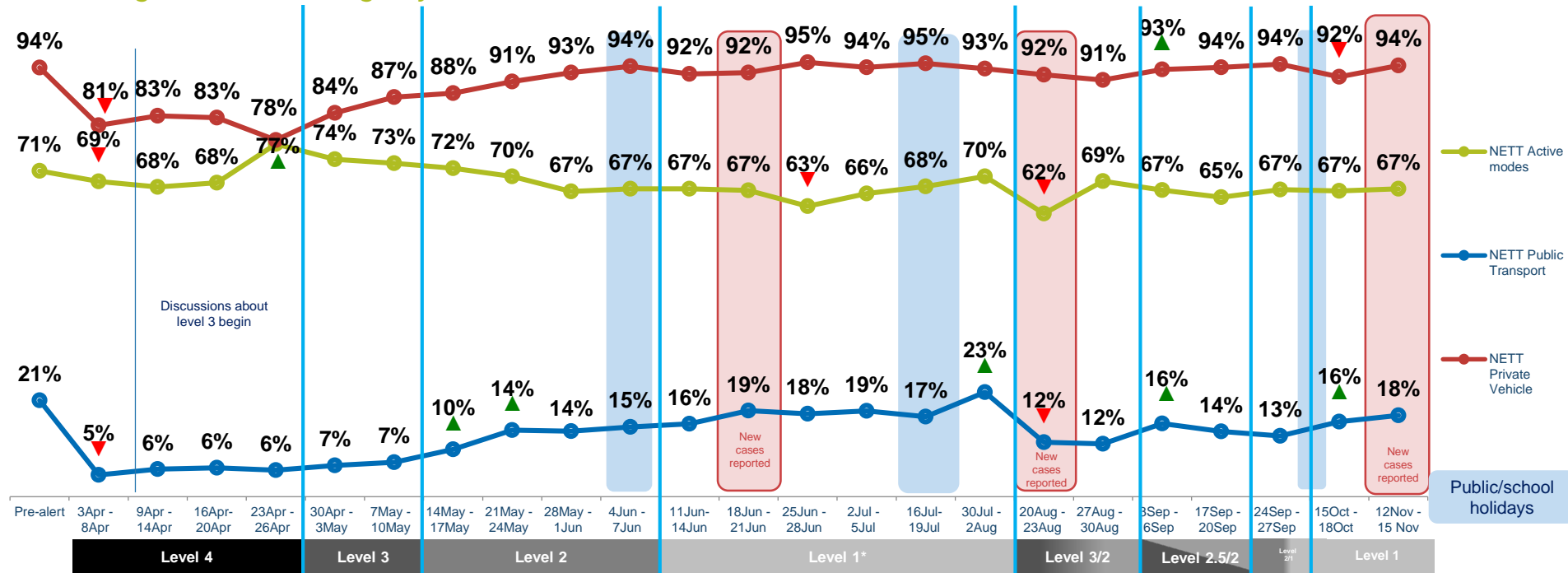
Waka Kotahi objective – how and why is travel changing?

- 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.
- At the national level, there has been a directional increase in reported weekly public transport usage, driven primarily by increases in reported bus usage.
- Auckland and Wellington are both experiencing some similar shifts in public transport dynamics, with directional increases to November for both cities, primarily driven by an increase in bus usage. However, they are also seeing significant increases in reported usage of ubers and taxis this month.
- Public transport usage in Wellington is now back to pre-lockdown levels, particularly for reported weekly bus usage, while in Auckland, reported weekly usage is still about five points short of pre-lockdown levels.
- For those staying off public transport in this second level 1 period, concerns about risk of transmission are much more prominent in major metropolitan areas like Wellington and Auckland than they are elsewhere in New Zealand. This is echoed by the fact that concern about others not wearing masks is significantly higher in these cities.
- Reported usage of all modes has increased directionally in the greater Christchurch area as the nation shifts to a national level 1 alert. Although only a directional shift, the three point increase in those reporting weekly bus usage brings the region only one point short of pre-lockdown rates.



Nationally, reported weekly mode usage has been relatively stable from October to November, with directional increases in private vehicle and public transport usage

Changes in mode usage by wave – national

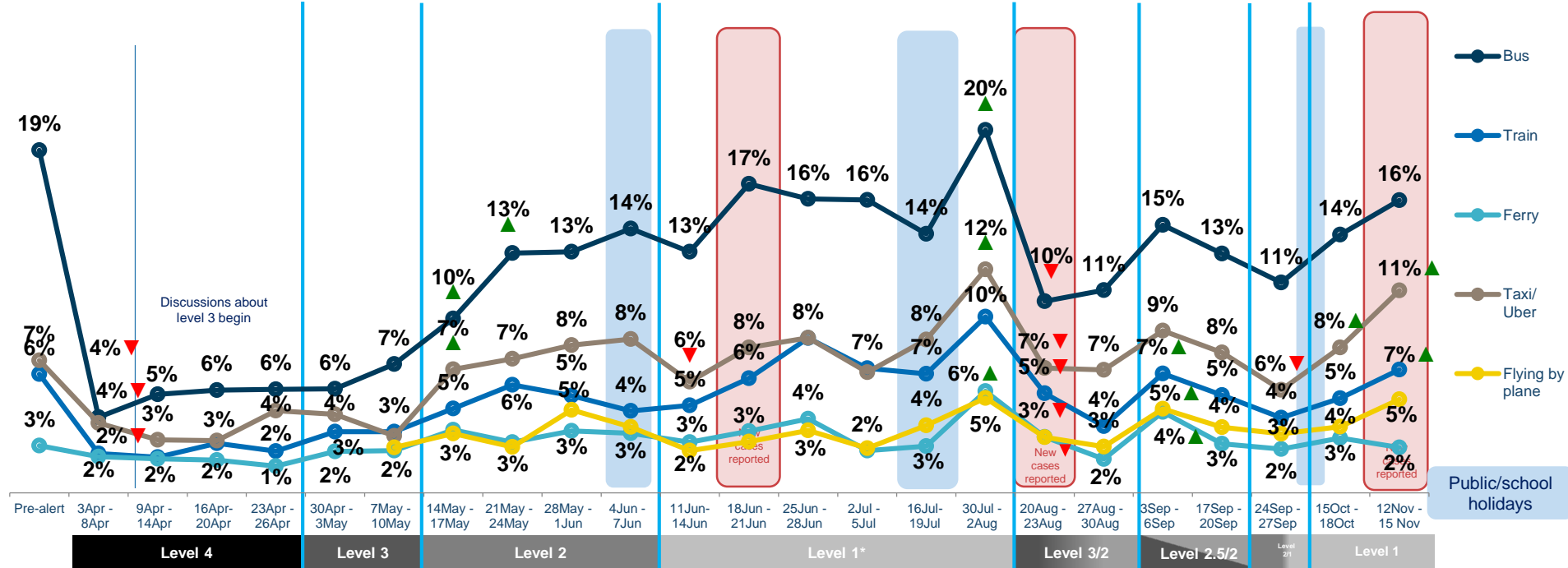


QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys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



Looking more closely at public transport, both taxi and train usage experienced statistically significant increases in reported usage, with bus use up directionally

Changes in mode usage by wave – national



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 (eg 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



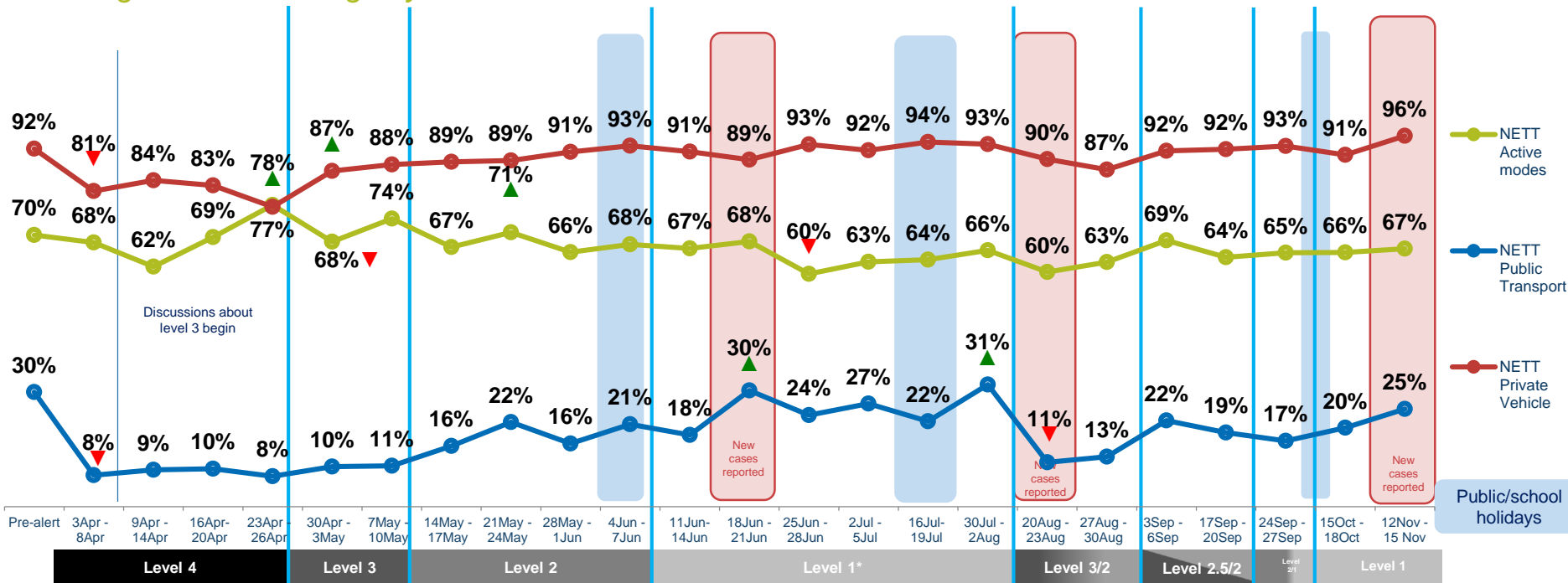
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Reported weekly public transport usage continues to grow directionally in Auckland and is at the highest level since the start of the second lockdown

Changes in mode usage by wave – Auckland

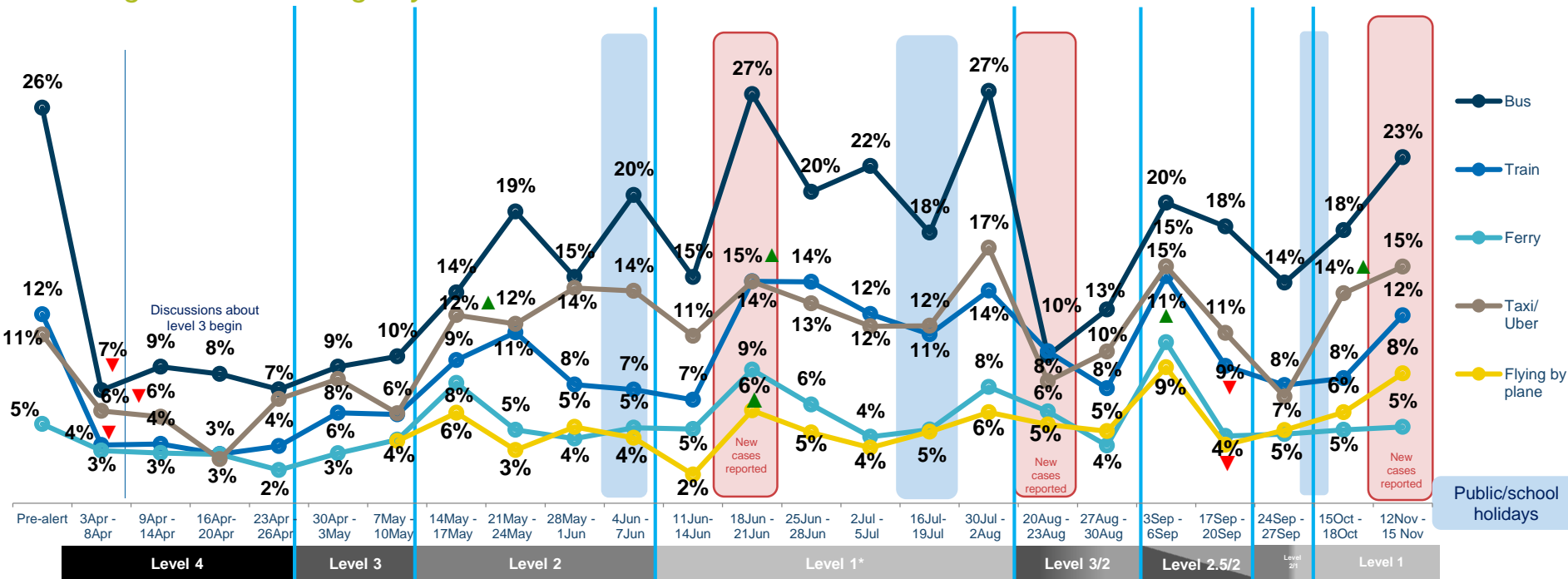


QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg 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 Auckland (n=c. 330 per wave)



Train usage, taxi usage and flights are all increasing, but it is the five point directional increase in bus usage that is driving reported PT usage in the region the most

Changes in mode usage by wave – Auckland

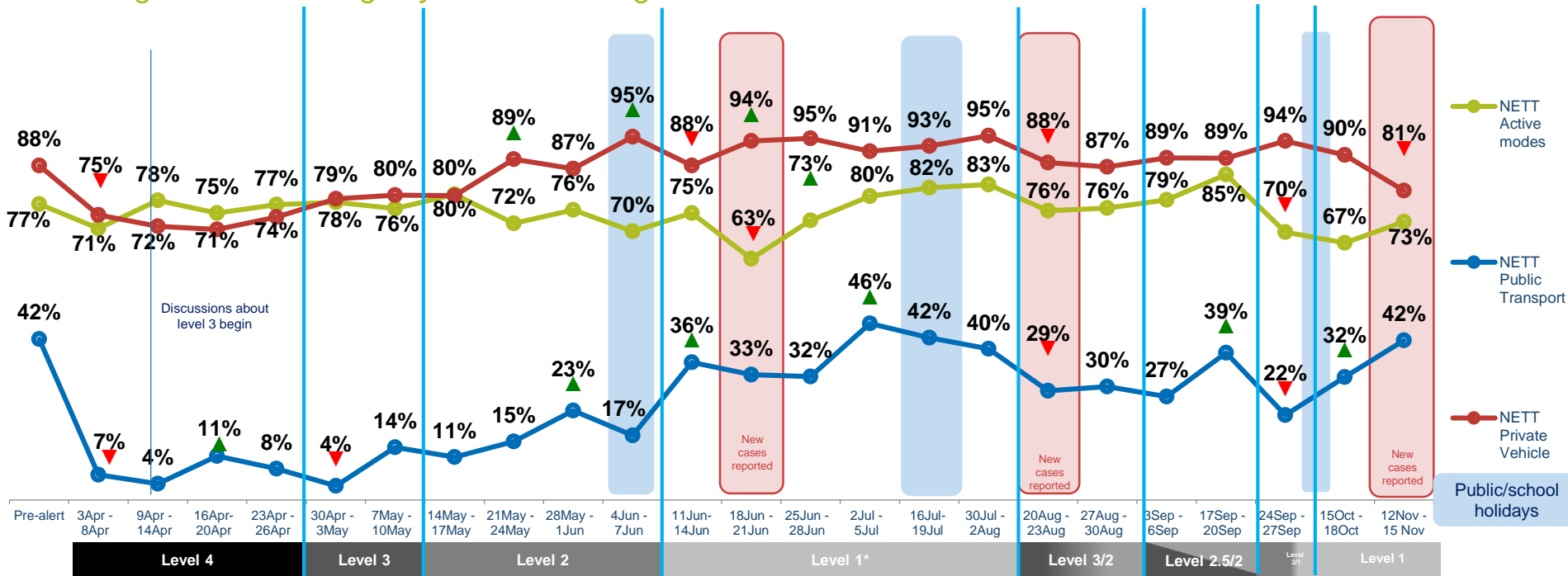


QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg 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 Auckland (n=c. 330 per wave)



Wellington has higher rates of public transport usage than much of the rest of New Zealand, and a 10 point increase this wave has brought it to pre-lockdown levels

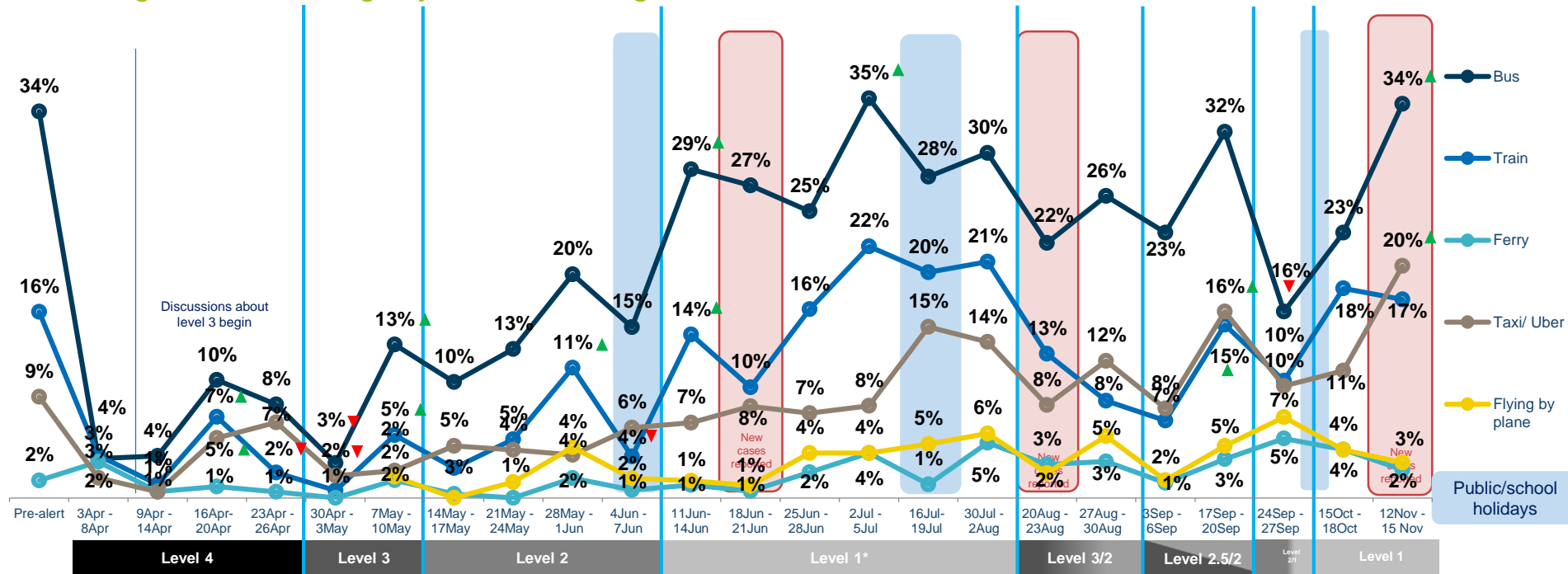
Changes in mode usage by wave – Wellington



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 (eg 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 Wellington

Reported weekly bus usage is also the big driver of public transport increases in Wellington, although like Auckland, the capital has seen a big shift to taxi usage

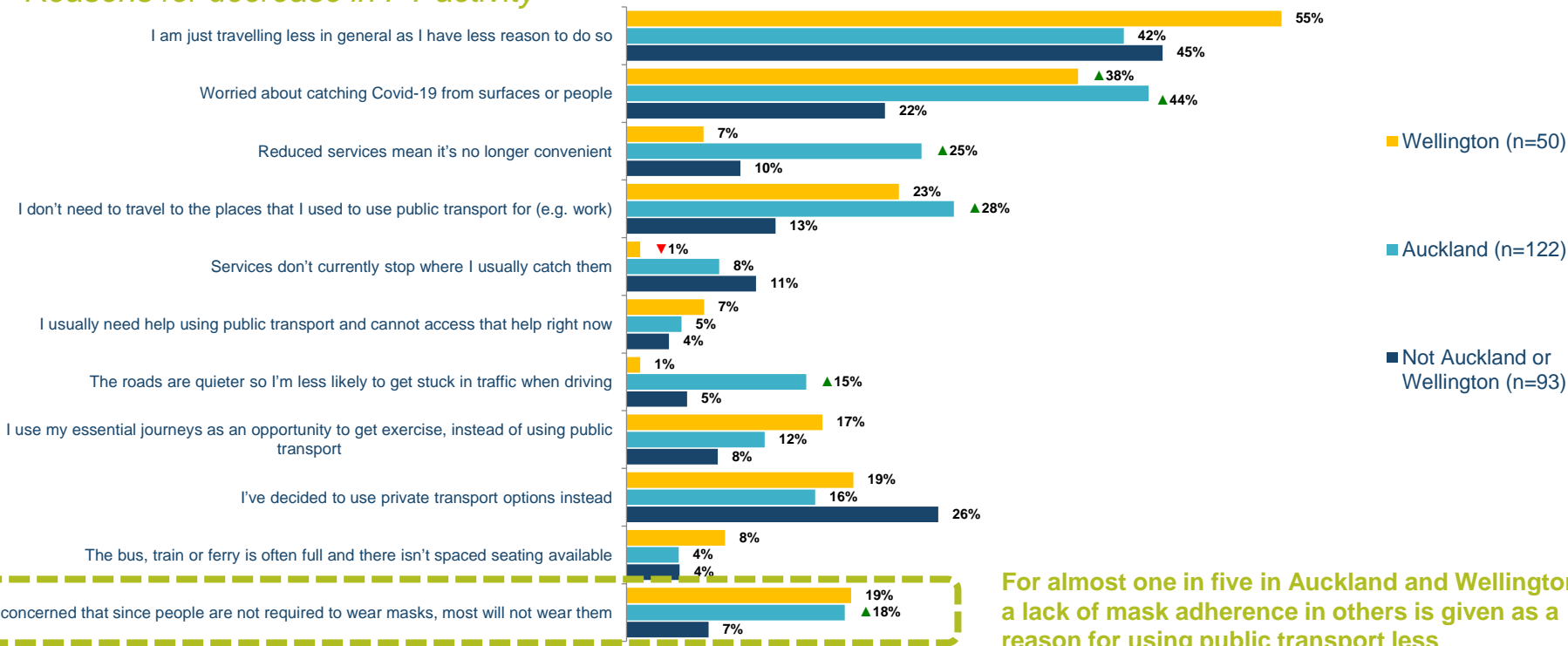
Changes in mode usage by wave – Wellington



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 (eg 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 Wellington

Those staying off public transport in Auckland and Wellington generally give similar reasons for doing so, with concerns about COVID transmission much higher there

Reasons for decrease in PT activity



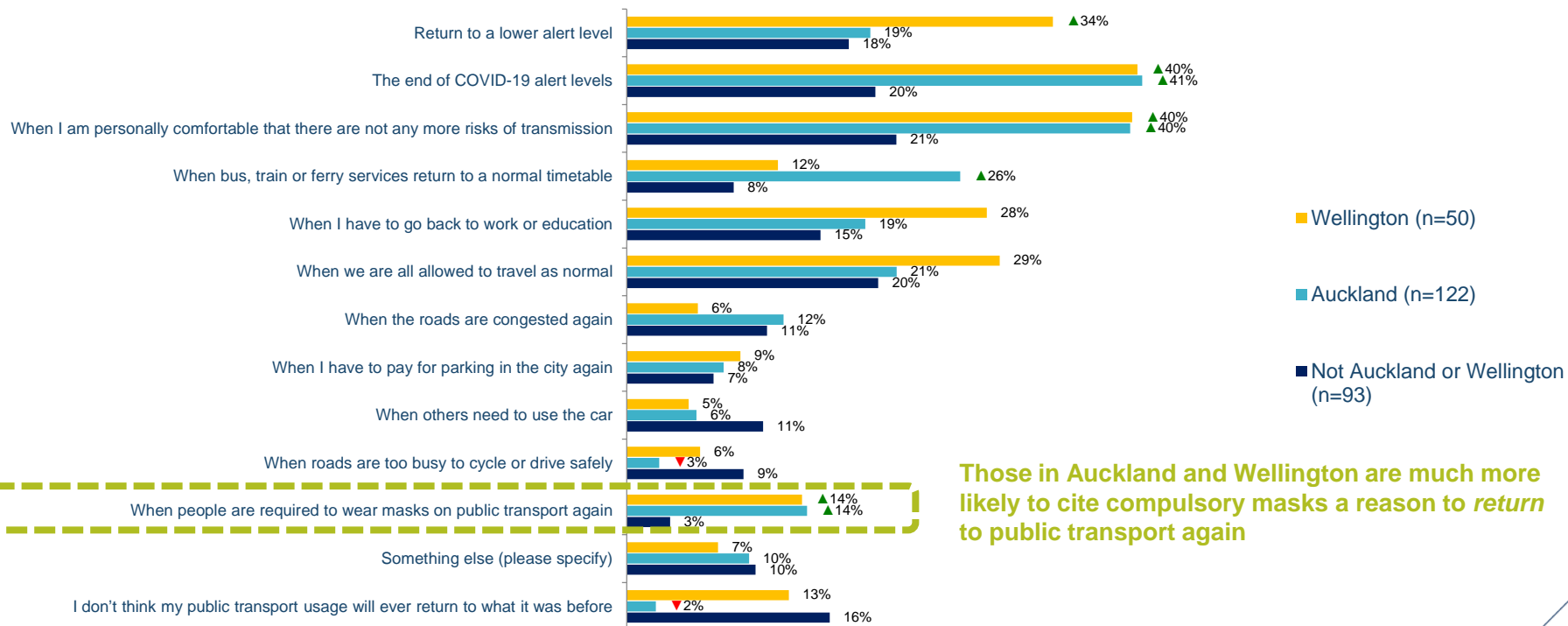
For almost one in five in Auckland and Wellington, a lack of mask adherence in others is given as a reason for using public transport less

For which, if any of the following reasons, has your use of public transport decreased?

Base: decreasing PT usage in past week; current alert level: level 1 (2nd)

Aucklanders and Wellingtonians generally cite a wider range of reasons that might encourage their public transport return, but an end to COVID risk is the top reason

Encourage to return to PT use



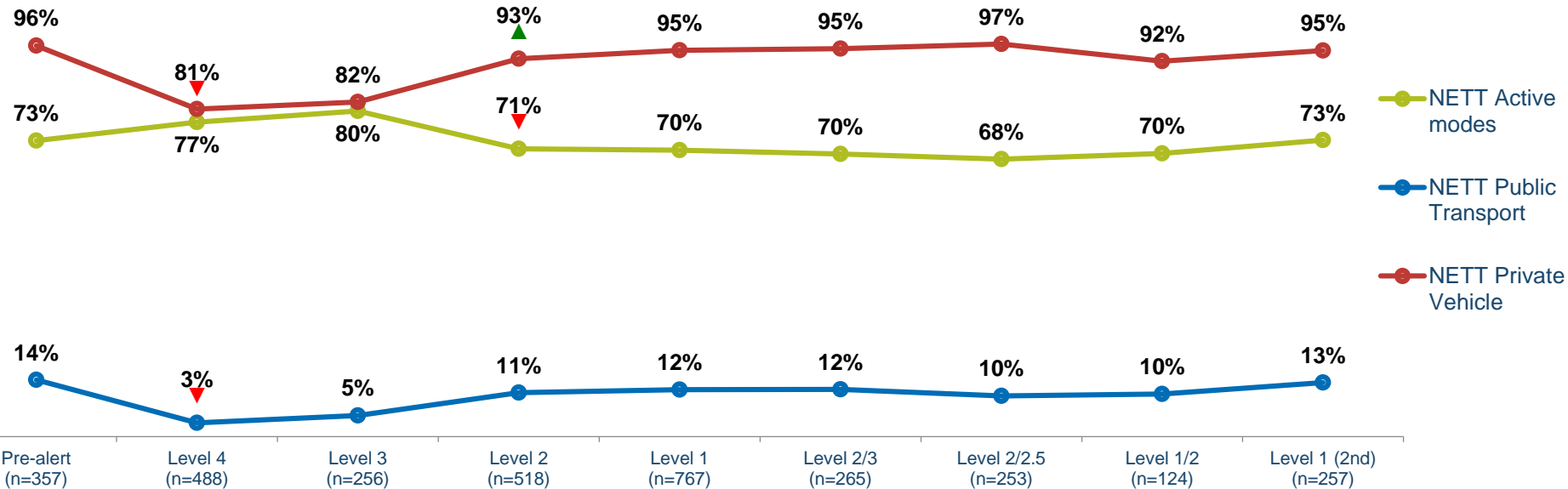
Those in Auckland and Wellington are much more likely to cite compulsory masks a reason to return to public transport again

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; current alert level: level 1 (2nd)

Reported public transport usage in the Greater Christchurch region has increased directionally and is only just short of the pre-alert level of reported usage

Changes in mode usage by level – Greater Christchurch

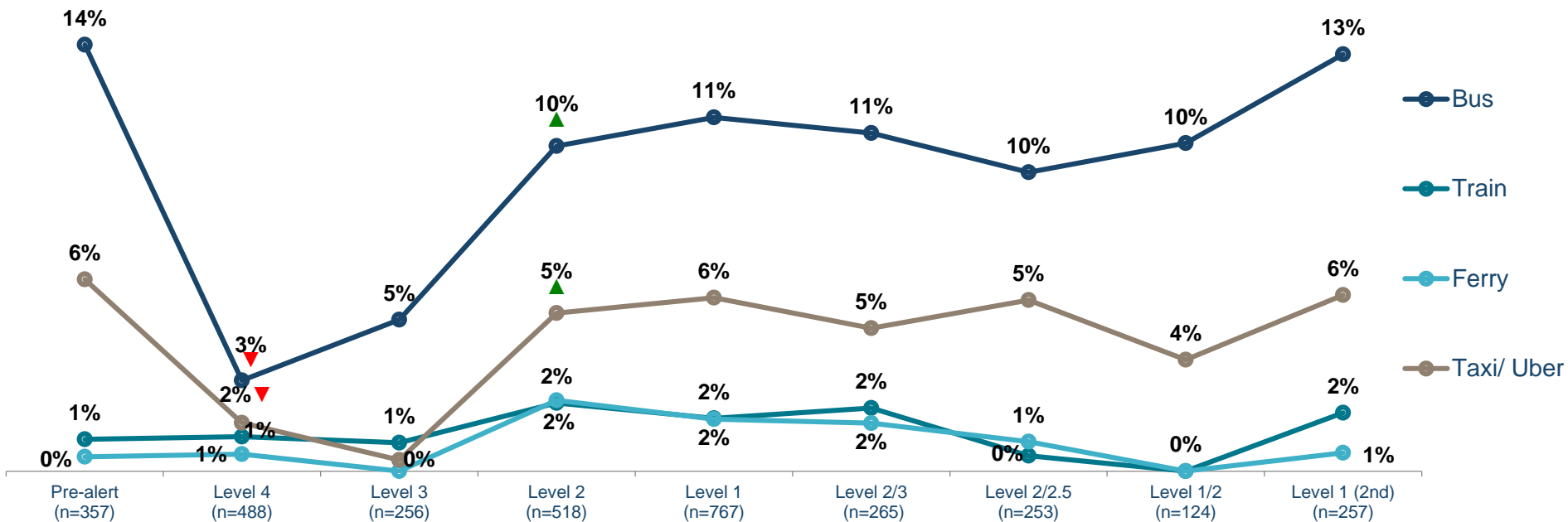


QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys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



As with other regions, it is a directional increase in reported weekly bus usage which is the biggest driver of increasing public transport levels

Changes in mode usage by level – Greater Christchurch

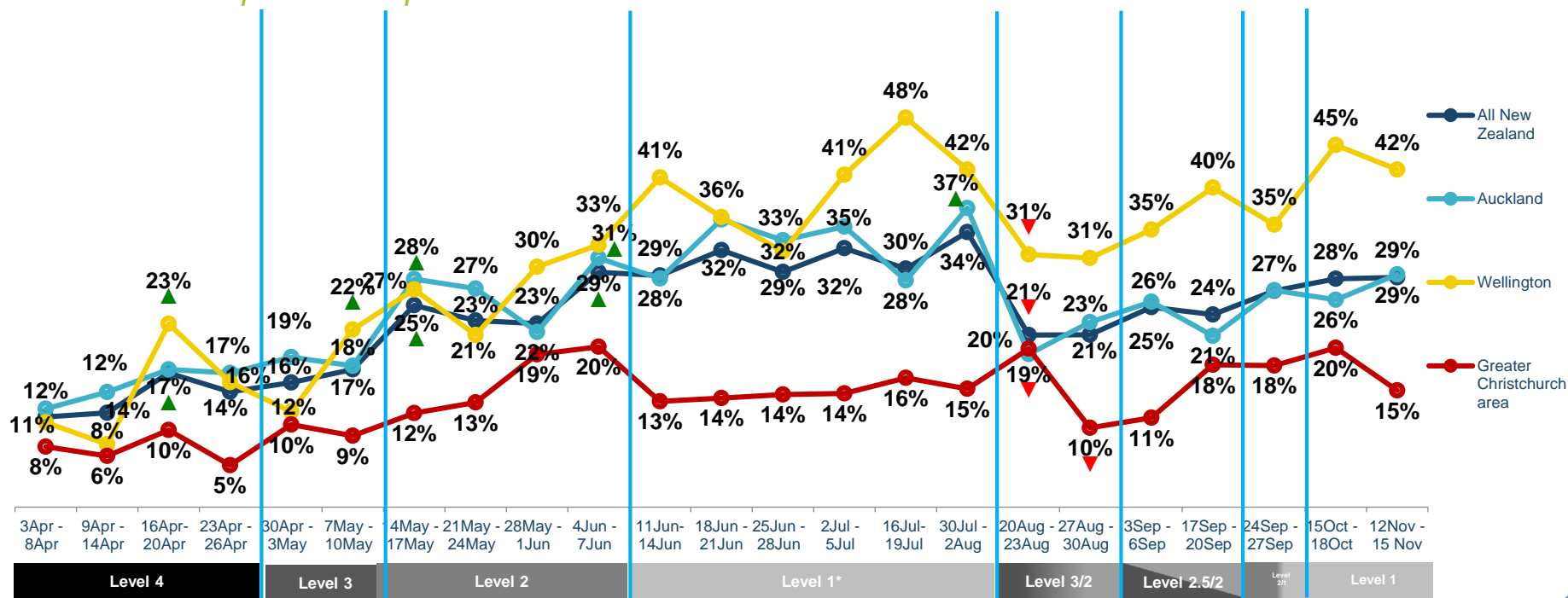


QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would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



Consideration of public transport has generally been higher in Wellington and lower around Christchurch, with Auckland much closer to the national average

Consideration of 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



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period



Section 7 – Perceptions of transport modes

Key findings – perceptions of transport modes

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

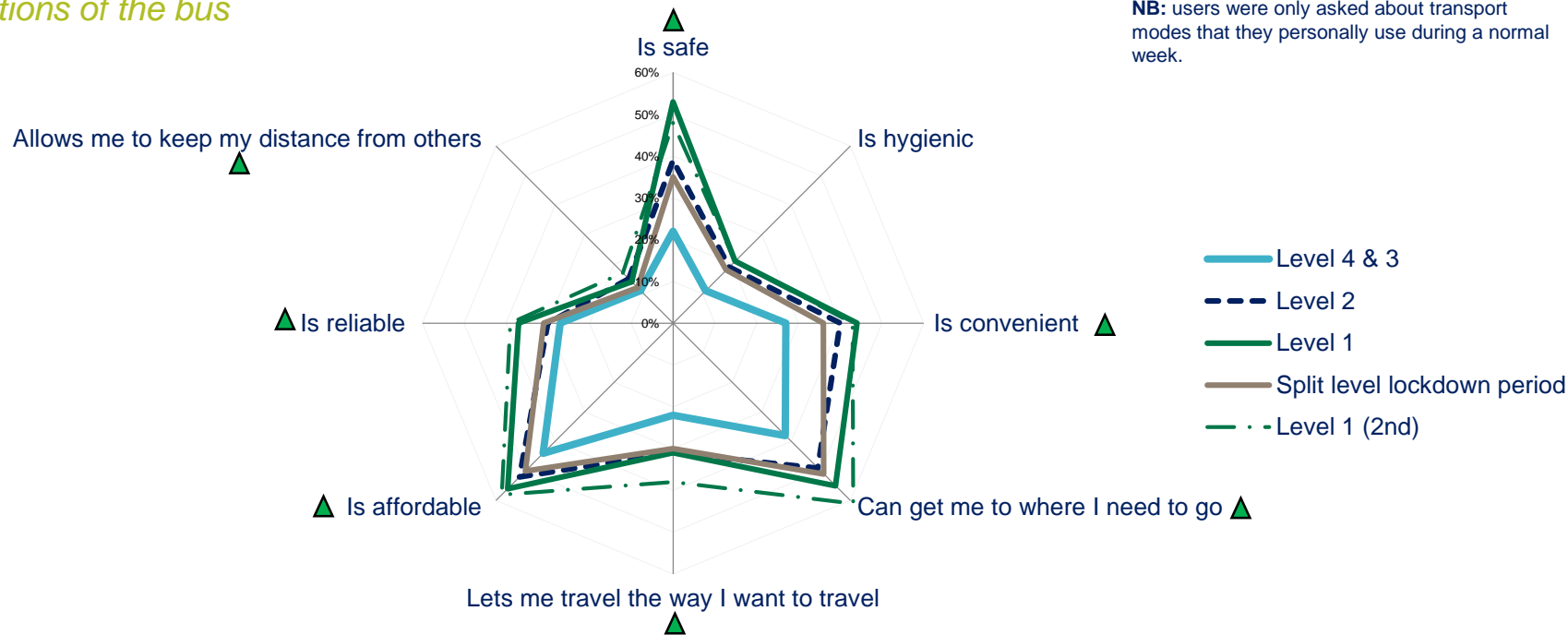
- The COVID-19 environment may over time change the way that New Zealanders perceive different modes of transport. This will be important to understand as these perceptions may impact people's travel patterns and behaviour.
- With the whole country having returned to alert level 1, the key question with transport modes is whether or not they could recover image perceptions to at least match what was seen during the previous level one period.
- Buses, which saw a significant increase in reported weekly usage this wave, largely achieved this except for on hygiene.
- Trains made similar gains, except on factors relating most closely to transmission risk: hygiene and social distancing (where trains have historically been weaker) and safety.
- Recovery on ferries hasn't really occurred, although more time in level 1 may be needed for a clearer read.
- Taxis and ubers, which also saw much greater reported usage this wave, have basically matched previous level one image perceptions.



In moving from a split level lockdown to national level 1, buses are looked on much more favourably, with increases in almost all image statements

Perceptions of the bus

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

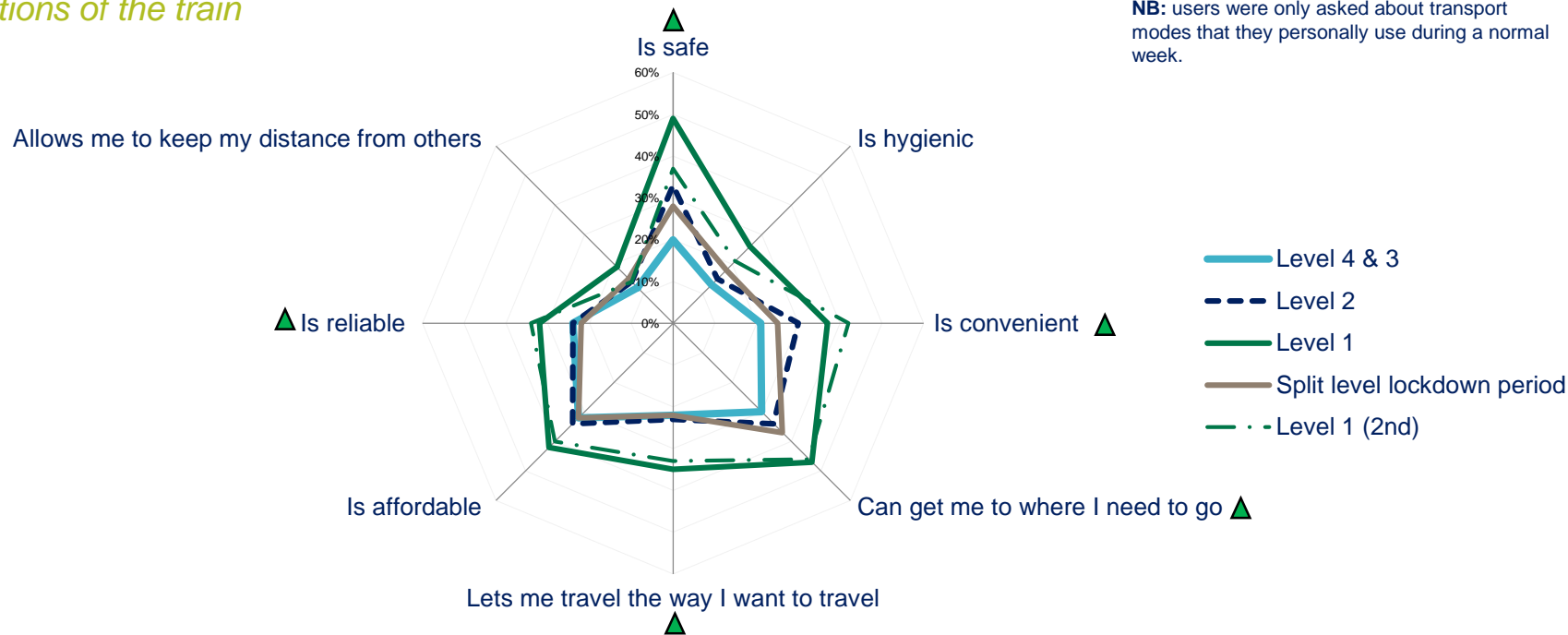


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: New Zealanders who travel by Bus normally: level 4&3 (n=1,395), level 2 (n=979); level 1 (n=1,489); Split level lockdown period (n=1,224); 2nd level 1 (n=463)

Trains are feeling a similar benefit, with many sentiments returning to those seen in initial level 1, although it hasn't returned on safety, distancing and hygiene

Perceptions of the train

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



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?

Base: New Zealanders who travel by train normally: level 4&3 (n=543), level 2 (n=453); level 1 (n=650); Split level lockdown period (n=485); 2nd level 1 (n=188)



Indicates a statistically significant increase against split level lockdown period



Indicates a statistically significant decrease against split level lockdown period

Ferries largely haven't recovered from the split level lockdown just yet

Perceptions of ferries

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



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?

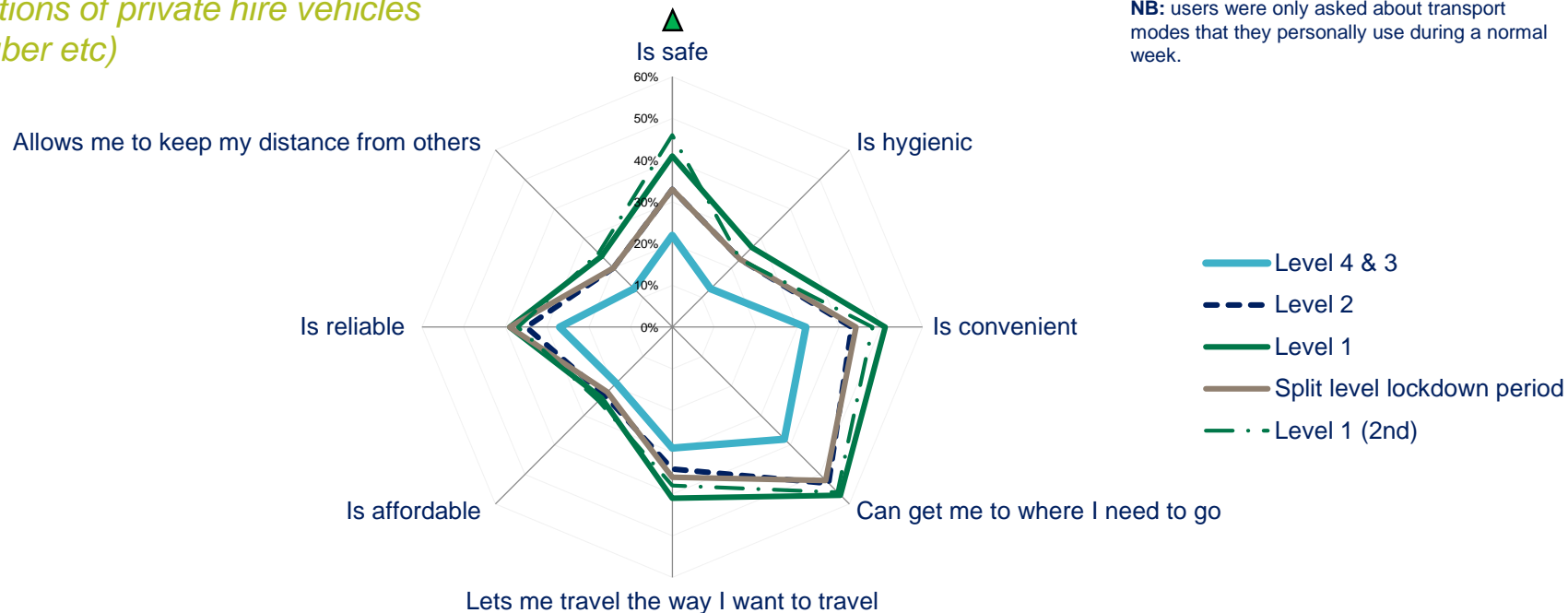
Base: New Zealanders who travel by ferries normally: level 4&3 (n=158), level 2 (n=173); level 1 (n=244); Split level lockdown period (n=186); 2nd level 1 (n=69)



Taxis and ubers are largely back to where they were during the initial level 1 lockdown period

Perceptions of private hire vehicles (taxi / uber etc)

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



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by taxi/uber normally: level 4&3 (n=556), level 2 (n=531); level 1 (n=721); Split level lockdown period (n=618); 2nd level 1 (n=246)





Section 8 – Working from home

Key findings – working from home

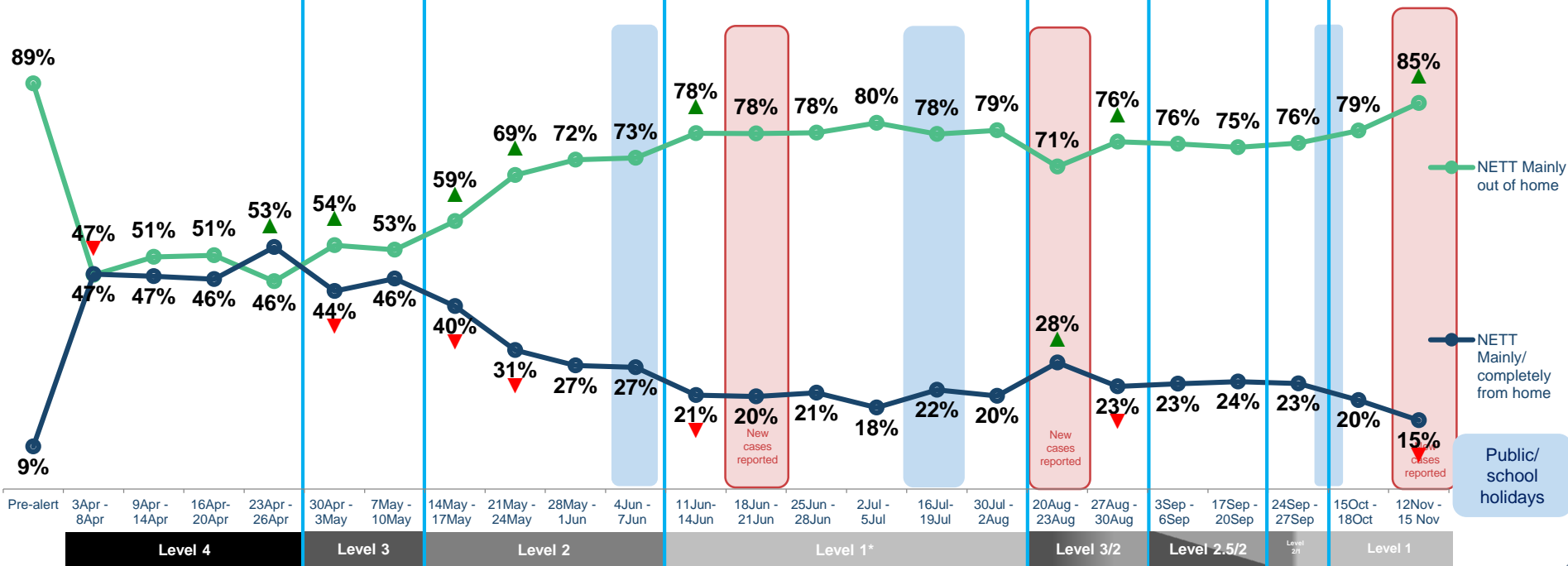
Waka Kotahi objective – understanding behaviour change

- 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 a national level, the proportion working from home for most of the week has significantly declined to the lowest level seen so far and only six points higher than it was before the initial lockdown.
- Looking at major urban areas, Wellington, Auckland and the Greater Christchurch area have generally been returning to work at similar rates, although Wellington was initially slower and the return to a higher lockdown level following community transmission stalled the return in Auckland through August and September.
- All commuter modes have seen a return in the second level 1 period, with significant decreases in the proportion of private vehicle and public transport commuters. However, public transport commuters are still much more likely to be working from home, with one in five currently doing so.



Echoing the increase in reported weekly work journeys, those working out of home increased a significant six points to the highest level recorded so far

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+ who are usually working



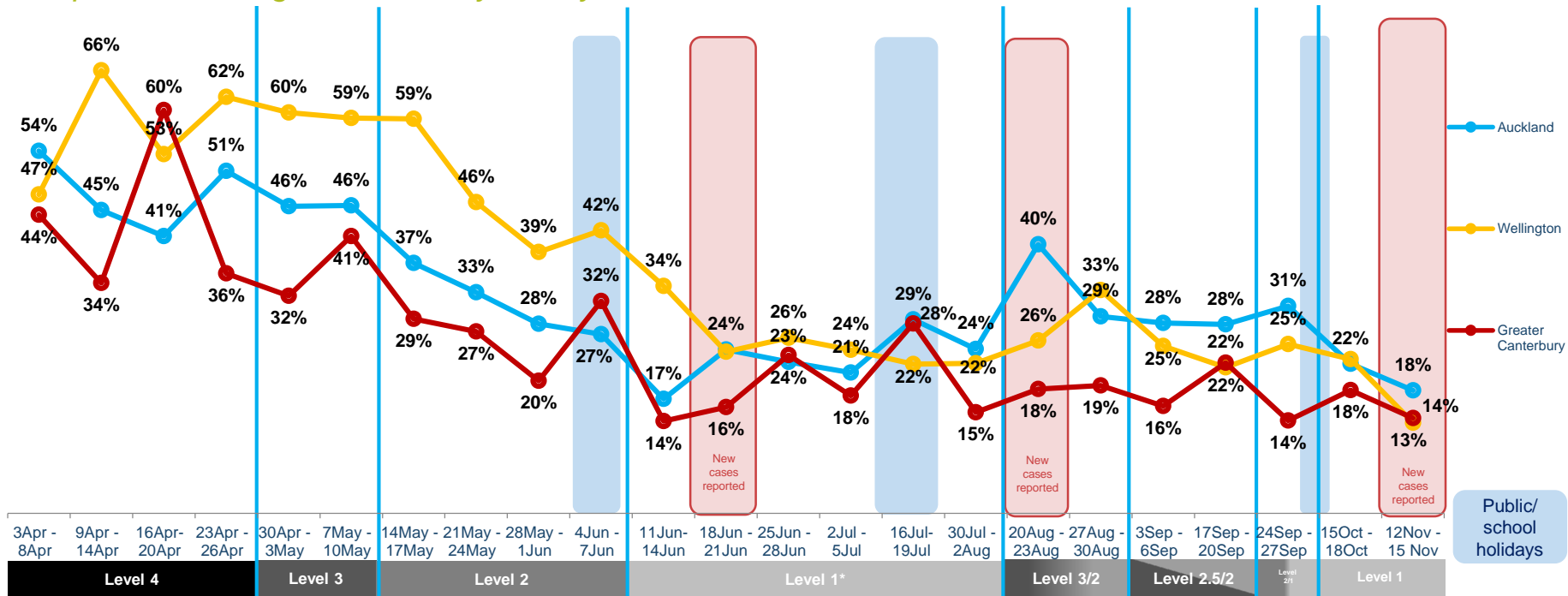
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The return to workplaces has largely been uniform across the country, although Wellington was initially slower, and Auckland lagged in the split level lockdown

Proportion working from 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+ who are usually working



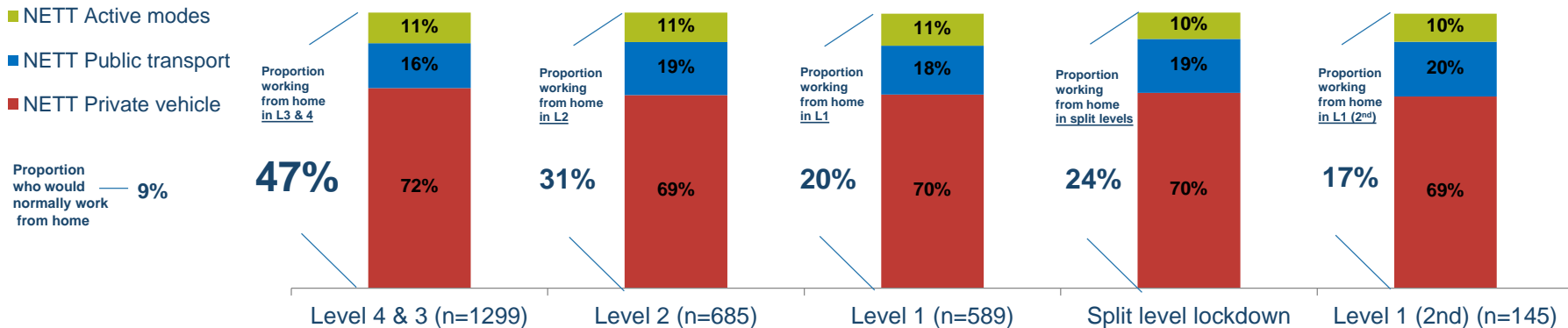
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Working from home has decreased significantly among public transport commuters, although one in five of them are still working from home

Proportion of commuters working from home who would normally travel by each mode



Proportion of each commuter type working from home

Proportion WFH by level	47%	31%	20%	24%	17%
Within active mode commuters	53%	31% ▼	17% ▼	18%	12%
Within private vehicle commuters	43%	25% ▼	13% ▼	16% ▲	11% ▼
Within public transport commuters	62%	42% ▼	24% ▼	36% ▲	19% ▼

QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work? By QMODE1_1 How would you normally make each of the following types of journeys listed below? – travelling to work

Base: all adults 15+ in New Zealand who normally commute by each of the modes mentioned for work



