



Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–26 core report

14 September 2021



Disclaimer

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

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

For more information on the COVID-19 weekly tracker contact:
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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.

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

1) Regular* overview power point report

- benchmark and longitudinal summary of key data points
- including extra analysis based on topical questions.

2) [Open Data tables](#)

- Downloaded crosstabs of key variables in excel format, accompanied by survey technical report and questionnaire changes tracking log, downloadable from Waka Kotahi Open Data portal

*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. Waves 23, 24, 25 and 26 have occurred on an ad hoc basis.

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 26 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 26 report is based on a statistically significant shift of results between waves 1 to 26, 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	Alert level 3
5	Thursday 30 April to Sunday 3 May	
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	Alert level 1
10	Thursday 4 June to Sunday 7 June	
11	Thursday 11 June to Sunday 14 June	
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	Alert Level 3 (AKL) Alert level 2 (Rest of NZ)
16	Thursday 30 July to Sunday 2 August	
17	Thursday 20 August to Sunday 23 August	Alert Level 2.5 (AKL) Alert level 2 (Rest of NZ)
18	Thursday 27 August to Sunday 30 August	
19	Thursday 3 September to Sunday 6 September	Alert level 2 (AKL) Alert level 1 (Rest of NZ)
20	Thursday 17 September to Sunday 20 September	
21	Thursday 24 th September to Sunday 27 September	Alert level 1
22	Thursday 15 th October to Sunday 18 th October	
23	Thursday 12 th November to Sunday 15 th November	Alert Level 3 (AKL) Alert Level 2 (Rest of NZ)
24	Thursday 4 th March to Monday 8 th March*	
25	Thursday 20 th May to Monday 24 th May	Alert level 1
26	Thursday 2 nd September to Monday 6 th September**	Alert Level 4 (AKL) Alert Level 3 (Rest of NZ)

*Please note: During the fieldwork period, on the 7th March AKL dropped to Alert Level 2 and the rest of New Zealand moved to Alert Level 1.

**Please note: Northland was also under Level 4 for much of the week preceding fieldwork, dropping to Level 3 at midnight on day of launch.

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.

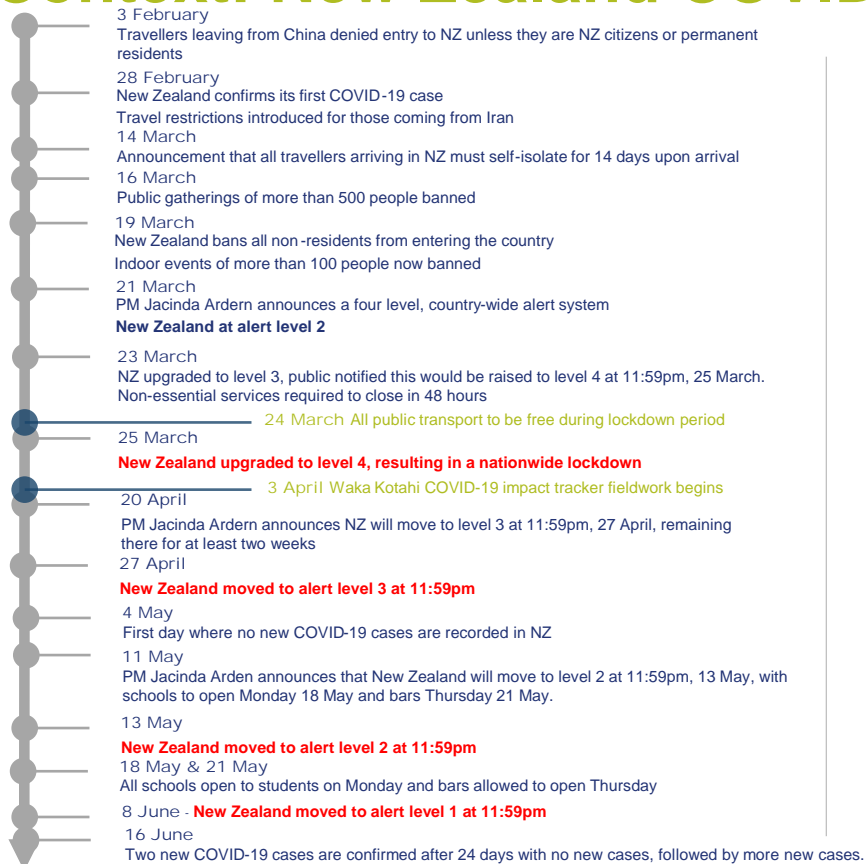
Sample structure and further definitions

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		Wave 24		Wave 25		Wave 26		
	Sample	MoE*	Sample	MoE*	Sample	MoE*	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	n=1,232	2.79	n=1,259	2.76	n=1,261	2.76	
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=1,324	2.69	n=1,964	2.21	n=661	3.81	n=676	3.77	n=331	5.39	n=331	5.39	n=331	5.39	n=331	5.39	n=331	5.56	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	n=67	11.97	n=100	9.8	n=100	9.8
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0	n=200	6.93	n=217	6.65	n=100	9.8	n=101	9.75	n=100	9.8	n=100	9.8	n=100	9.8	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	n=161	7.72	n=194	7.04	n=164	7.65
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	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	n=100	9.8	n=100	9.8	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	n=373	5.07	n=334	5.36	n=336	9.8
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	n=142	8.22	n=187	7.17	n=133	8.5
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	n=297	5.69	n=311	5.56	n=324	5.44
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	n=160	7.75	n=133	8.5	n=159	7.77

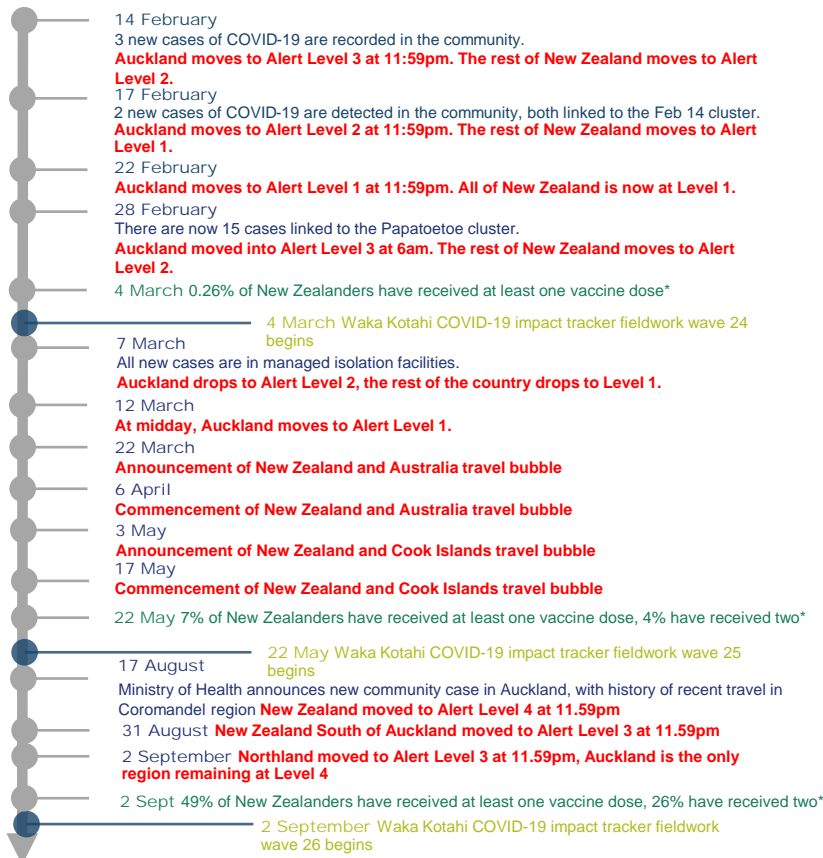
*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 April 12:44pm.

**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 - 2020



Context: New Zealand COVID-19 timeline - 2021



*Cumulative vaccination data sourced from health.govt.nz on 14.09.2021




Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1-26

Waka Kotahi COVID-19 transport impact tracker

Wave 26 of fieldwork took place following the first national level 4 lockdown since April 2020, with Auckland still under level 4 conditions and the rest of the country at level 3.

- Explicit concern about transmission and infection increased as might be expected, matching rates seen in previous cluster outbreaks, similar to where they were in the initial level 3.
- The high level of the recent lockdown may have impacted confidence in transport network usage in other ways.
 - The proportion disagreeing that leaving the house worries them dropped significantly, indicating attitudes similar to those seen during the May 2020 level 3 period and the proportion agreeing that their routines were disrupted doing the same.
 - However, there is some confidence around understanding of restrictions and a high level of commitment to following them.
- With much of the country under level 4 conditions in the preceding week, New Zealanders restricted their movement at rates comparable to April and May of 2020.
- Frequent essential journeys like work and education related journeys dropped significantly to rates seen during the initial alert level 3 conditions, with around 23% reporting that they'd travelled for work.
 - Despite a significant drop from May 2021, grocery shopping journeys continued to take place at a higher rate.
- Compared to 2020, the perception that streets are a more enjoyable environment have significantly softened, with two key changes: a statistically significant increase in the proportion citing no change and a significant 10 point decrease in those giving the highest rating for enjoyability.
 - Walking running and cycling for leisure did not increase compared to the previous research wave in May, with cycling actually decreasing significantly.
 - The absence of cars or traffic continues to be the big driver of perceptions that streets are more enjoyable whilst, while those enjoying streets less were primarily impacted with issues of crowding
- As has often been the case, the impact of lockdown restrictions on public transport usage was more pronounced than for other modes, with weekly public transport usage down to about a third the level recorded in May. This extends to all modes, but buses are most acutely impacted.
 - The main cause of this change appears to be the lack of travel in general by public transport users. Compared to May 2021, when New Zealand was at alert level 1, the proportion saying that they are just travelling less in general jumped from 35 to 51% and there were few indicators of mode shift occurring for journeys, with fewer mentions for these causes compared to the previous wave.
 - This is supported by the increase in reduced alert levels as a trigger for returning to public transport, 69% selected this option during the most recent wave compared to 24% in May 2021.
- The new lockdown has meant that the proportion working from home increased significantly compared to May 2021. However, it is not as high as rates seen during the initial lockdown months of 2020. This impact is similar across the week.
 - Public transport continues to be impacted by commuters working from home at a higher rate and this pattern also occurs equally across the working week and weekends.

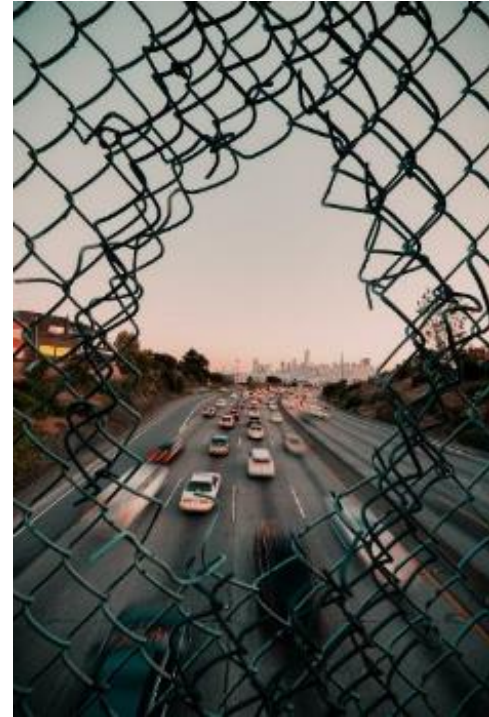


Section 3 – Context

Key findings – context

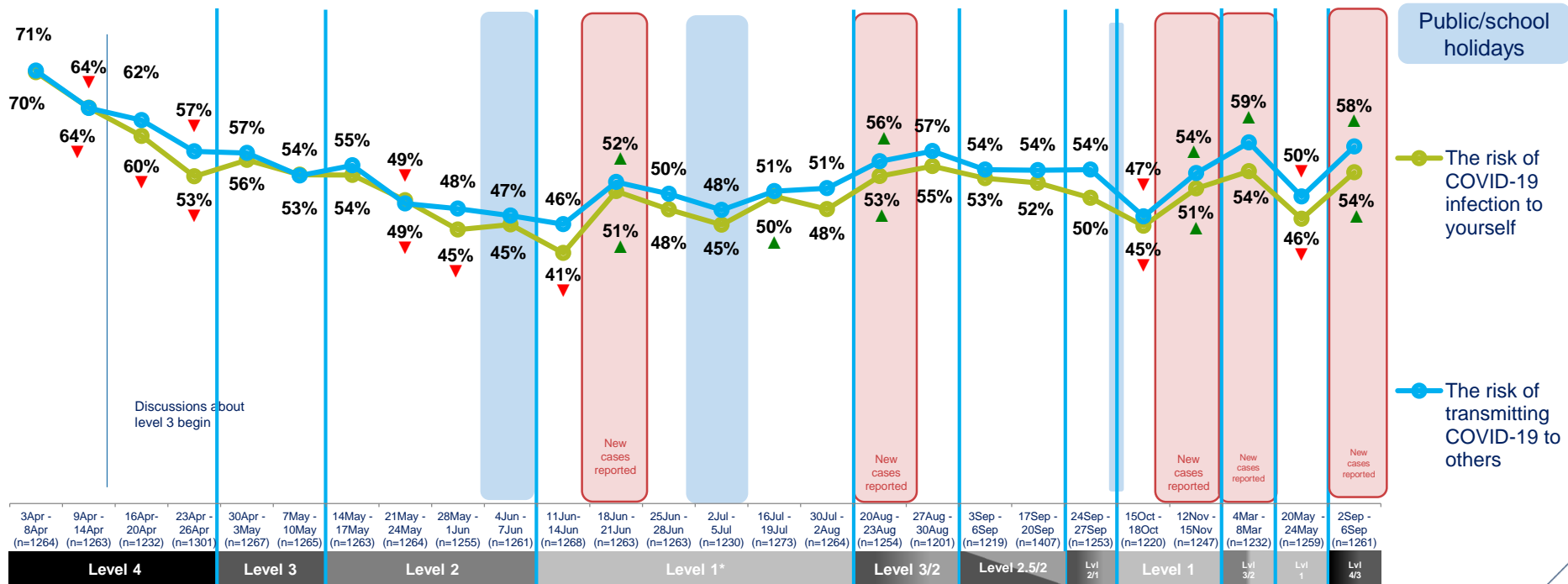
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- 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 following the first national level 4 lockdown since April 2020, with Auckland still under level 4 conditions and the rest of the country at level 3 (although Northland had spent much of the preceding week in level 4 as well).
- Explicit concern about transmission and infection increased as might be expected, matching rates seen in previous cluster outbreaks, similar to where they were in the initial level 3 lockdown. The vaccination status of New Zealanders does not appear to greatly affect perceived infection risk, with the fully vaccinated not significantly less concerned than those waiting.
- Concern about personal finances and economic situation continued to decline steadily and after several COVID outbreaks and lockdowns, these factors no longer appear to respond to changing restrictions in New Zealander's ability to get around.
- With every outbreak, concerns about further clusters and national lockdowns jumps significantly, with around seven in 10 worried about a local one, and around eight in 10 worried about outbreaks somewhere in the country.
- There has been no change in concern around complacency in others.
- The high level of the recent lockdown may have impacted confidence in transport network usage in other ways. The proportion disagreeing that leaving the house worries them dropped significantly, indicating attitudes similar to those seen during the May 2020 level 3 period and the proportion agreeing that their routines were disrupted doing the same.
- However, there is some confidence around understanding of restrictions and a high level of commitment to following them.
- It should be noted, given the time elapsed in this research that many New Zealanders have gone through life changes that might affect their transportation network usage. Roughly two in five have experienced one of the measured changes, with half of those saying that they've moved to a new home. These factors could mean different access to means of travel or changes in network usage.



Concerns about both transmission and infection matched closely the levels seen during the most recent March lockdown and during initial L3 conditions of May 2020

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



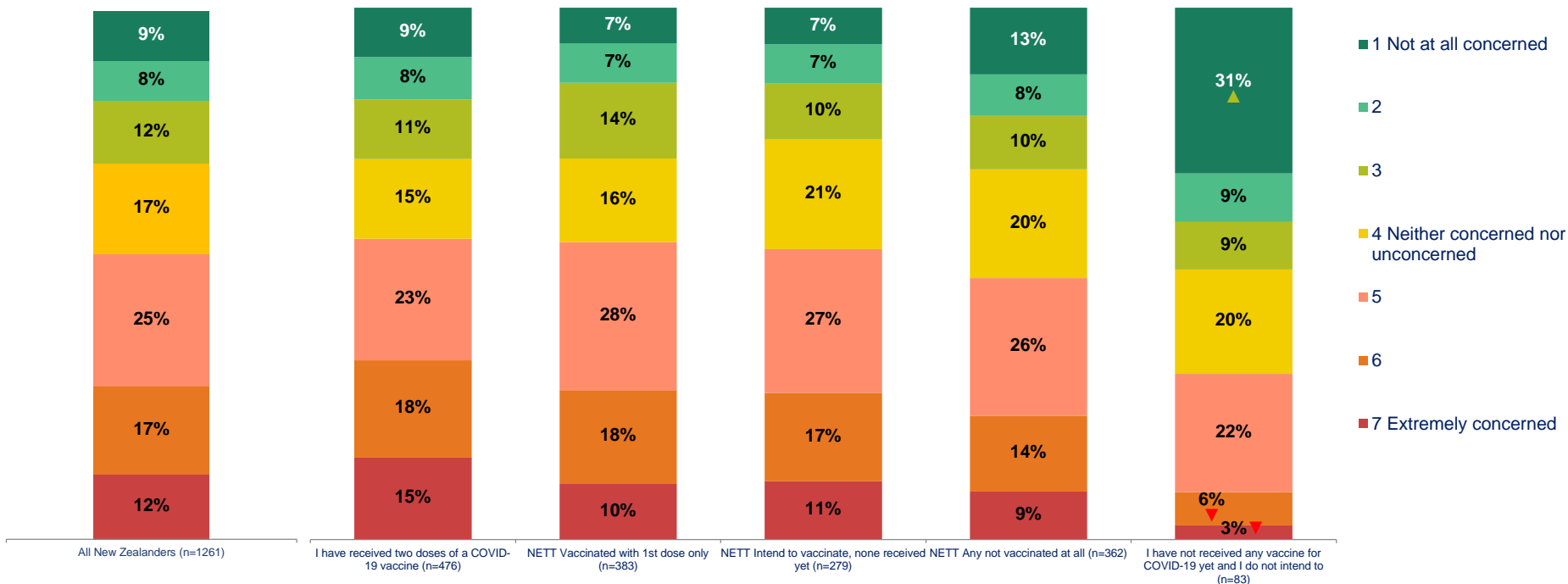
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Those with no intention to vaccinate do not seem concerned in a way that would affect their travel, while others have higher but uniform levels of concern

The risk of COVID-19 infection to yourself



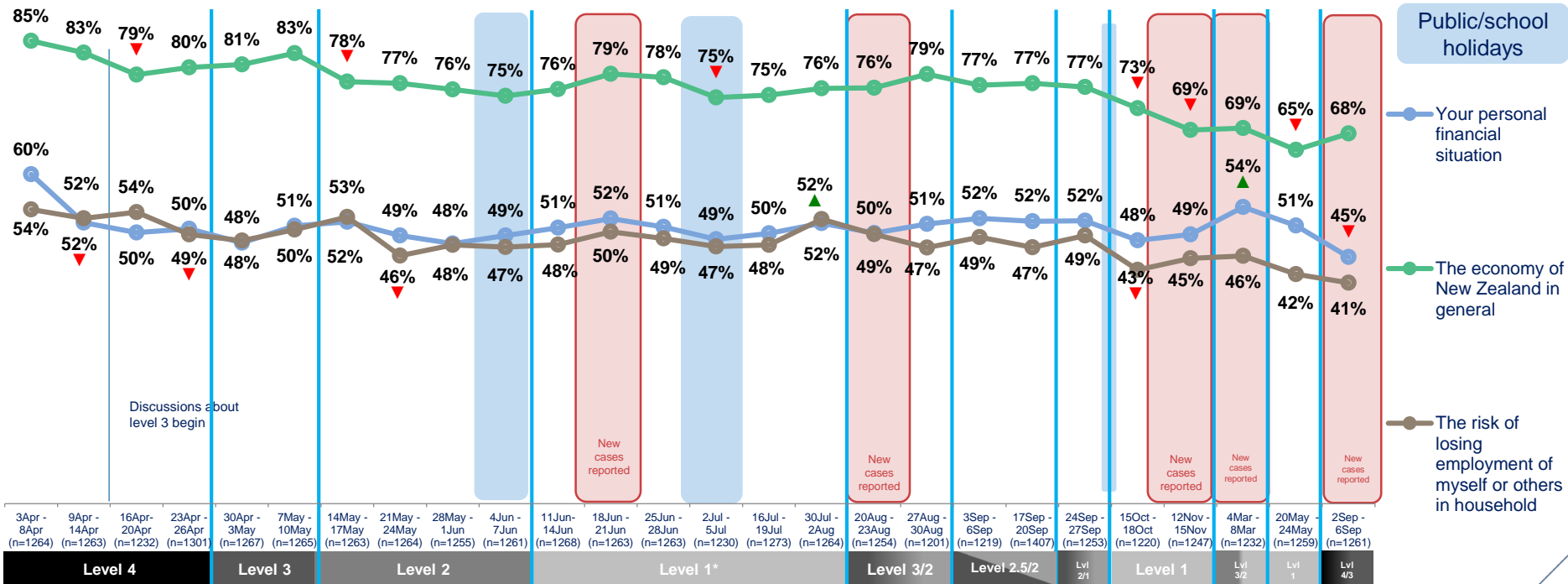
QPTUSE3. How personally concerned are you about each of the following?

Base: all adults 15+ in New Zealand during wave 26, Sep 2-Sep 6 2021



Economic worries now seem somewhat divorced from COVID outbreaks, with personal finance and job retention worries at their lowest level so far

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



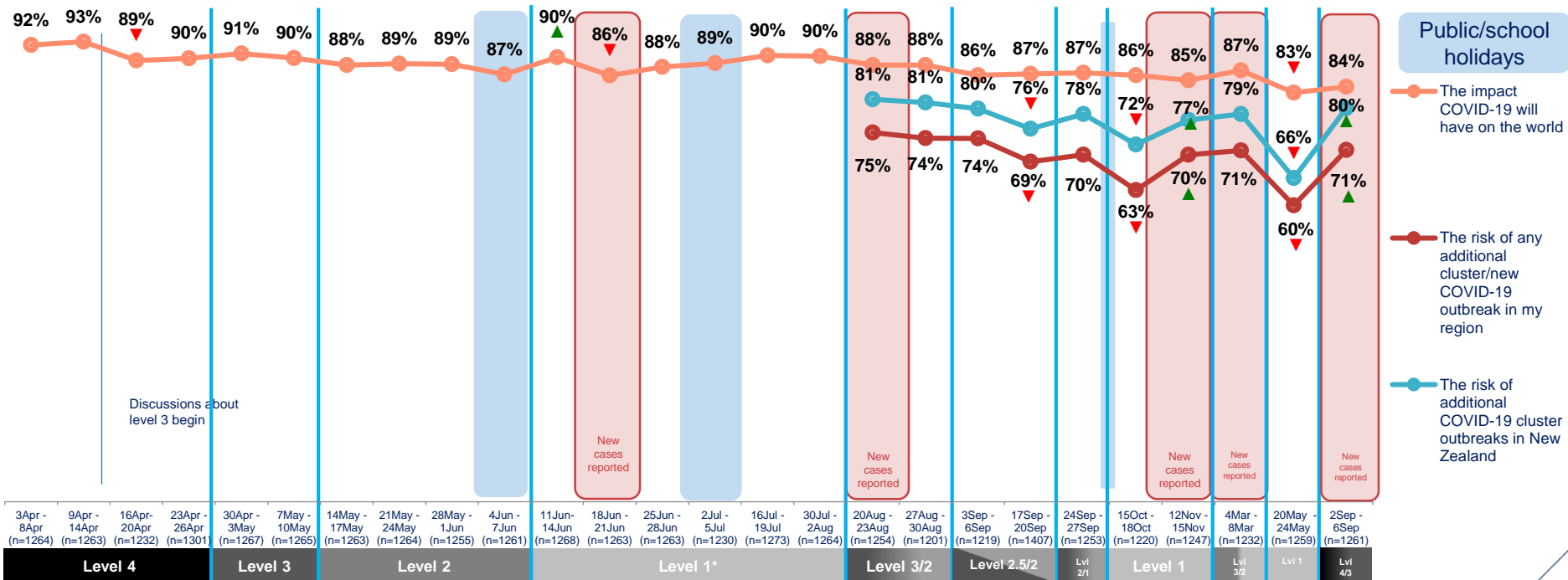
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Following a relaxation of concern about additional outbreaks in May, the new lockdown has returned these concerns to similar levels to before

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



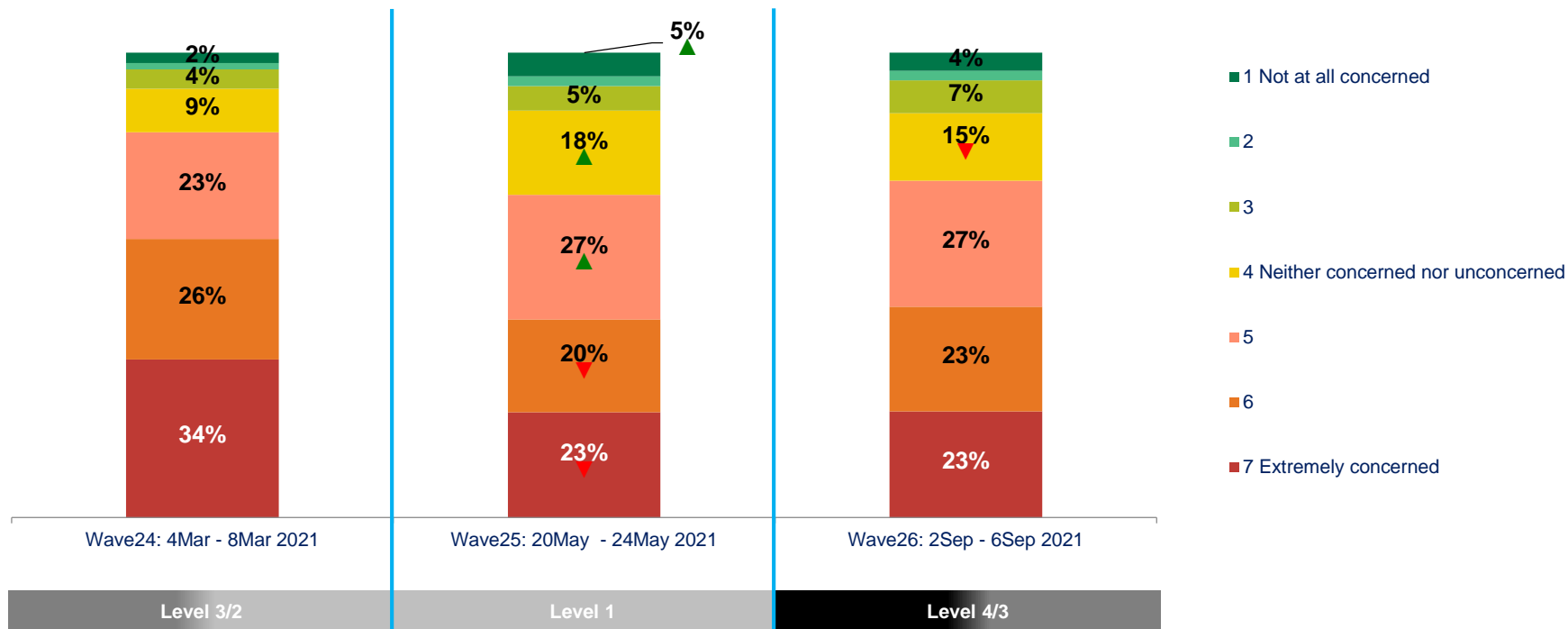
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

There has not been any statistically significant shift from level 1 to the new lockdown when it comes to worries about complacency in others

People have stopped seeing COVID-19 as a threat and are not following guidelines



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, statement suppressed for most waves during this time period



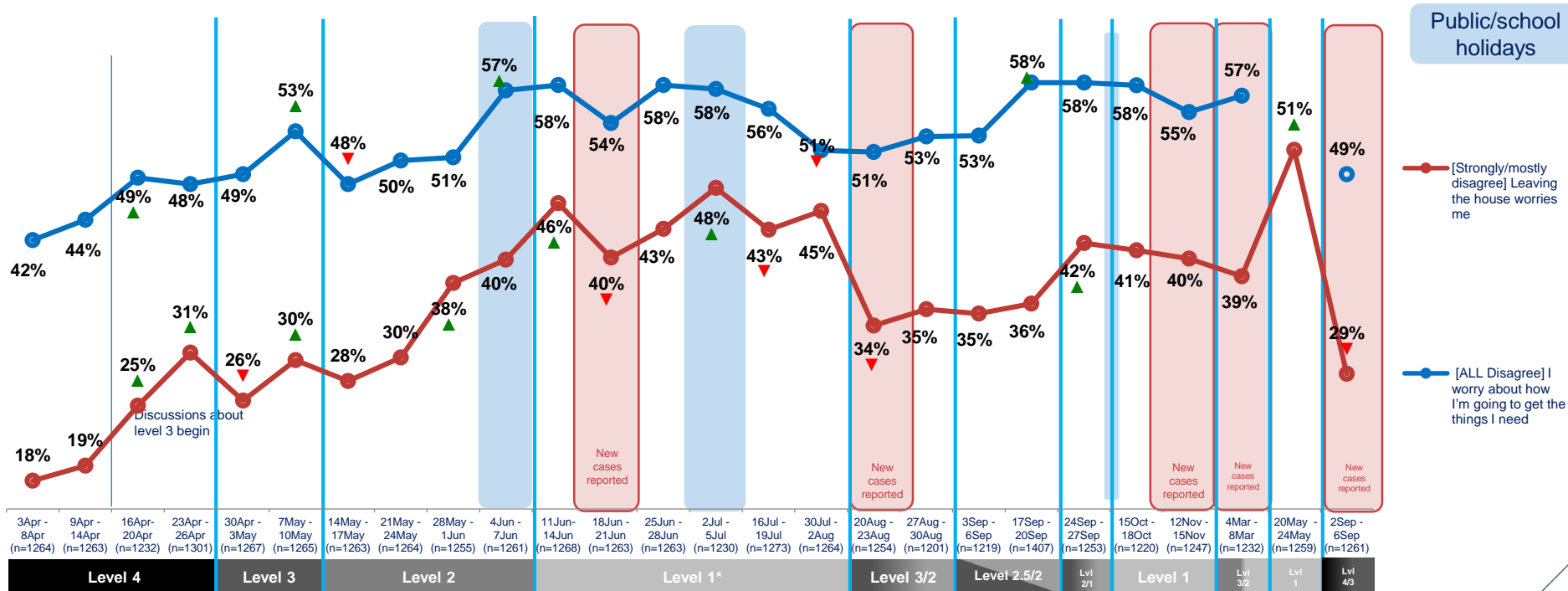
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Concerns about capability are clearly increased, the proportion disagreeing that leaving the house worries them is as low as in initial level 3 lockdowns

COVID-19 attitudes (NETT all who disagree or strongly/mostly disagree)

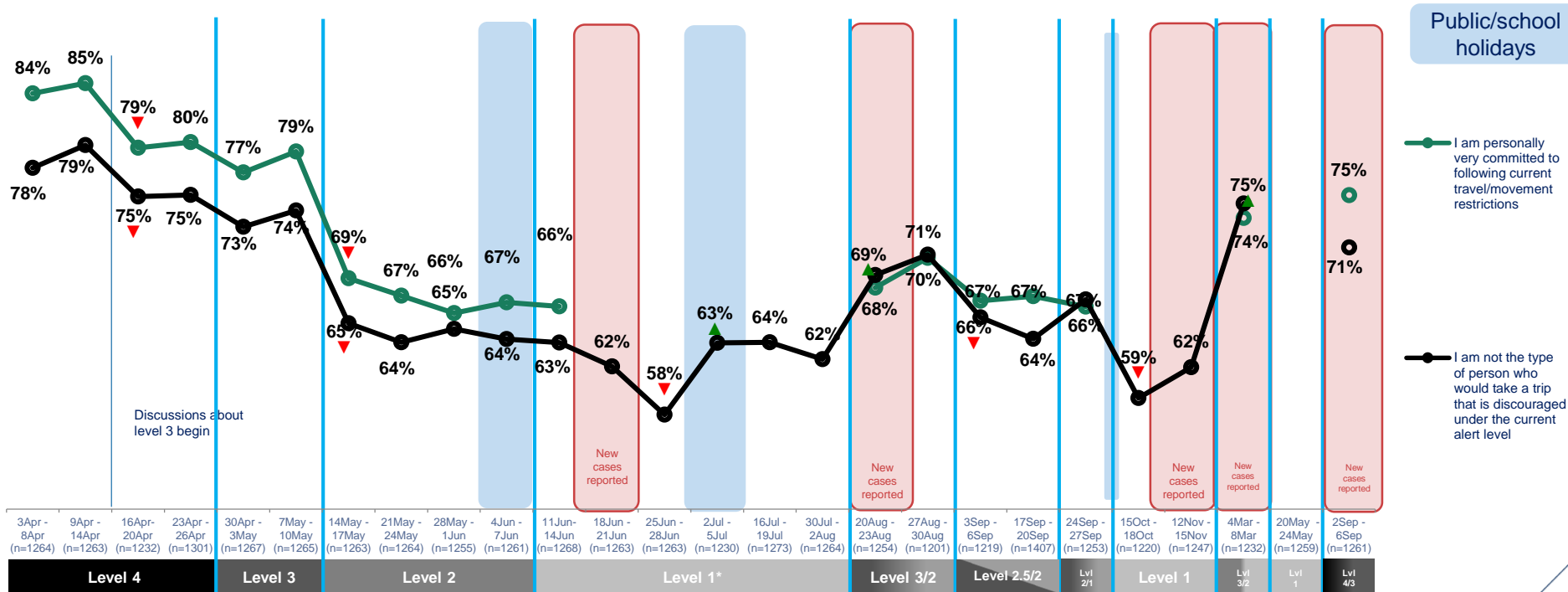


QATT. To what extent do you agree or disagree with the following statements?

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

Motivations to restrict movement appear strong at this time and are close to those expressed during the initial level 3 lockdown

COVID-19 attitudes (NETT all who strongly or mostly agree)



QATT. To what extent do you agree or disagree with the following statements?

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



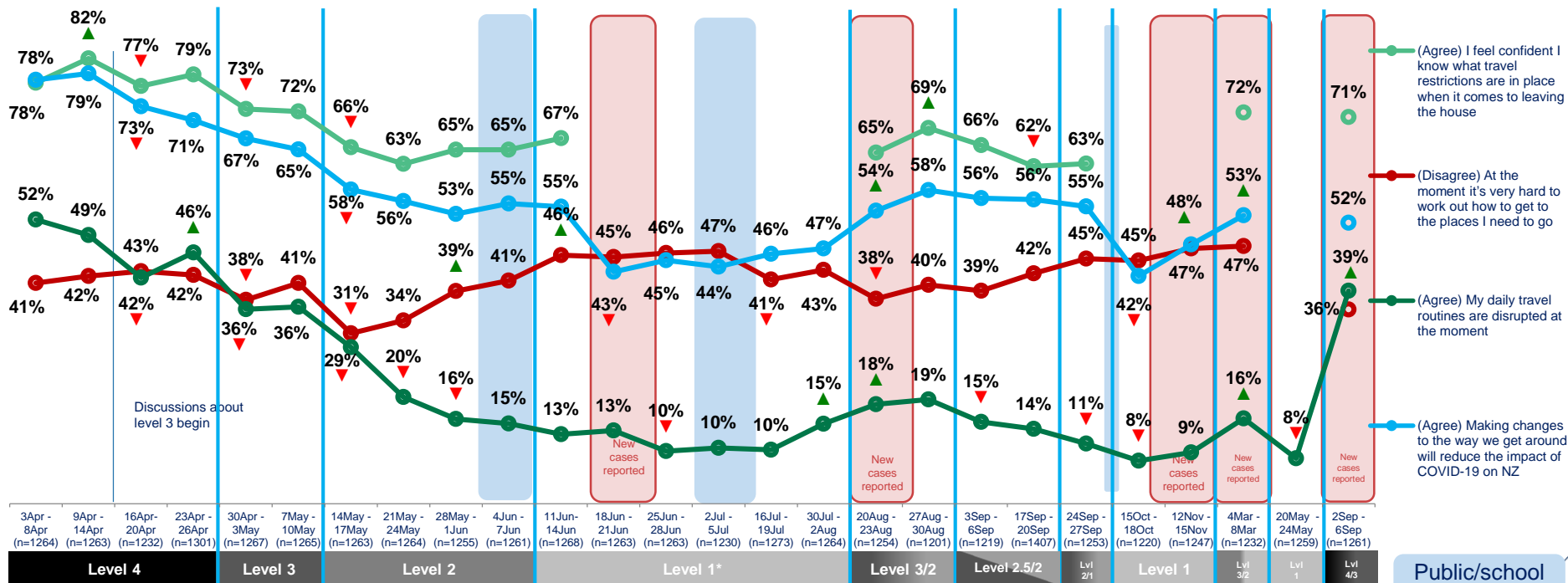
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

For the first time since April 2020, as many as two in five agreed that their routine was disrupted; social motivations to restrict movement have not increased significantly

COVID-19 attitudes (NETT all who agree or disagree)



QATT. To what extent do you agree or disagree with the following statements?

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



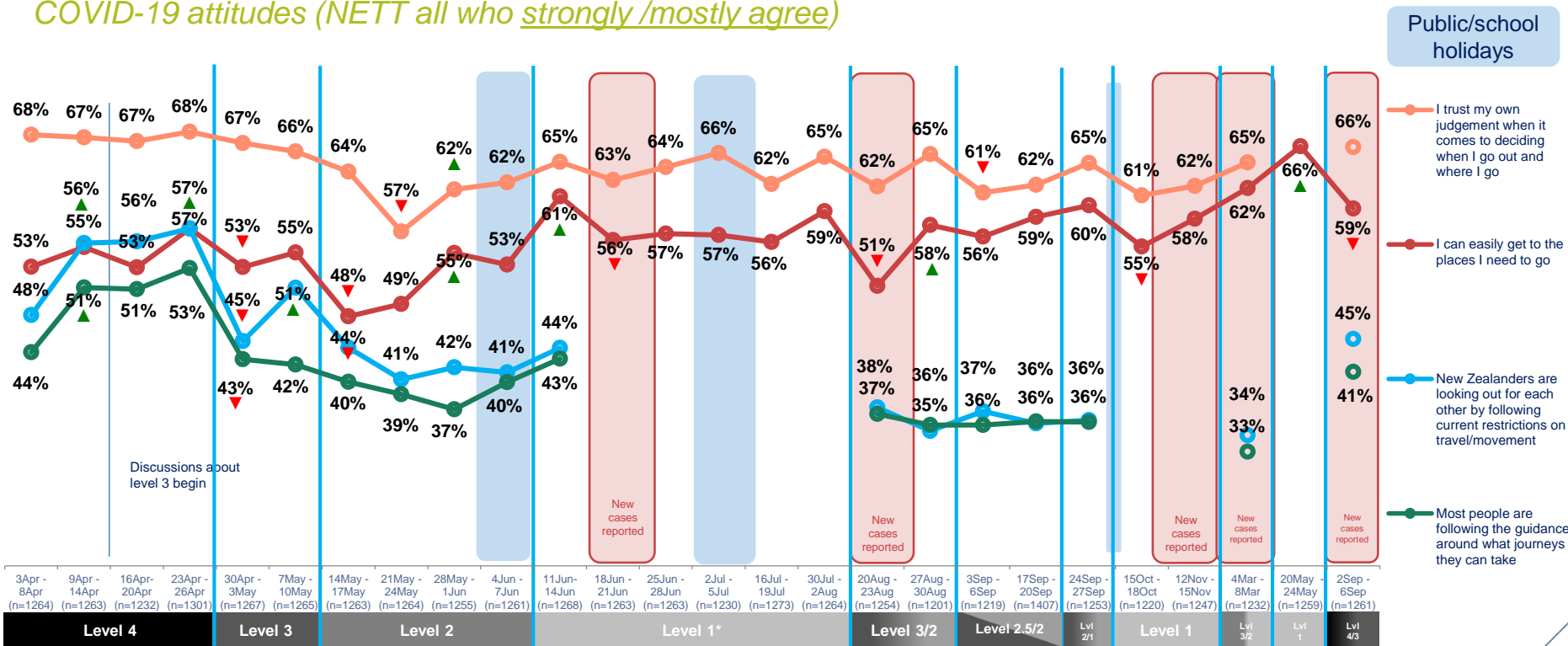
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

While it has dropped significantly, the proportion who say they can easily get where they need to go is similar to the initial alert level 1 period

COVID-19 attitudes (NETT all who strongly /mostly agree)



QATT. To what extent do you agree or disagree with the following statements?

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



Indicates a statistically significant increase from previous time period

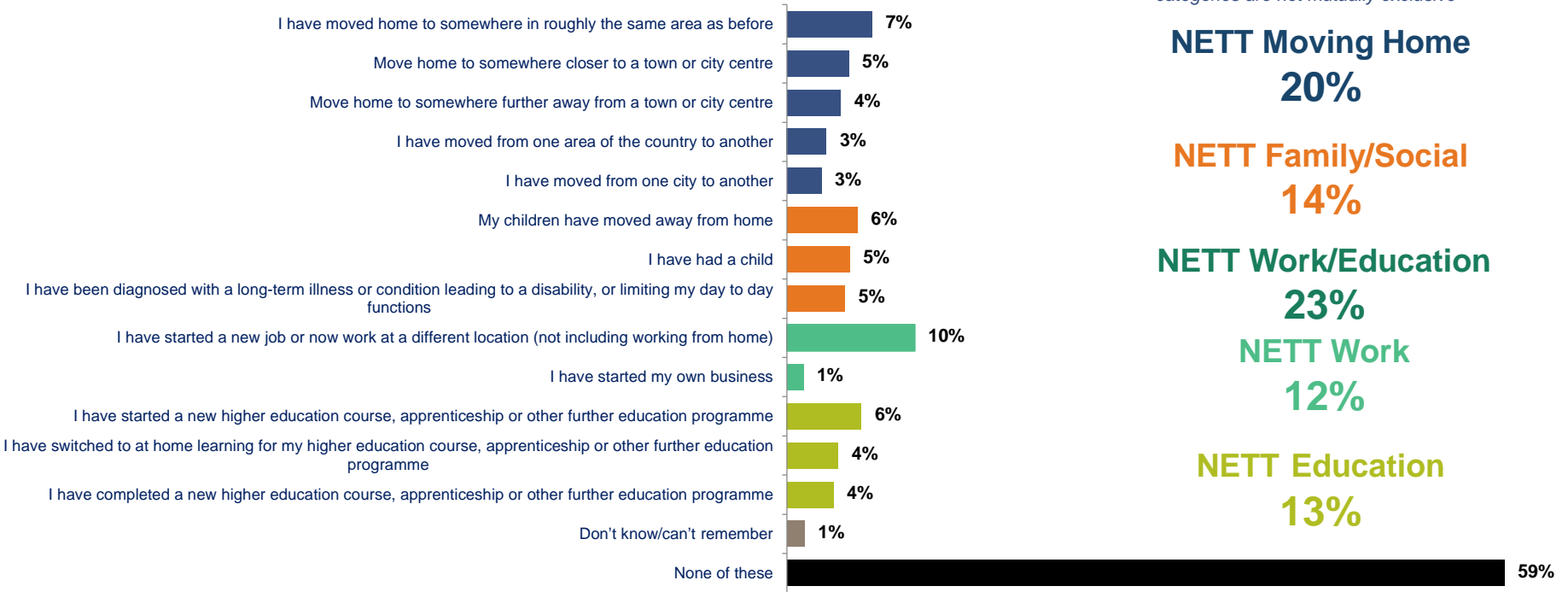


Indicates a statistically significant decrease from previous time period

As many as 2 in 5 New Zealanders have experienced some sort of life change in the past 18 months, primarily in relocating in some way which may affect transportation

Non-COVID related life changes since initial outbreak

NB: respondents could select multiple events if multiple applied to them, categories are not mutually exclusive



QLIFE Thinking now about the past 18 months (from early March 2020 – Sept 2021). Which, if any of the following applies to you?


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 – Behaviours

Key findings – behaviours

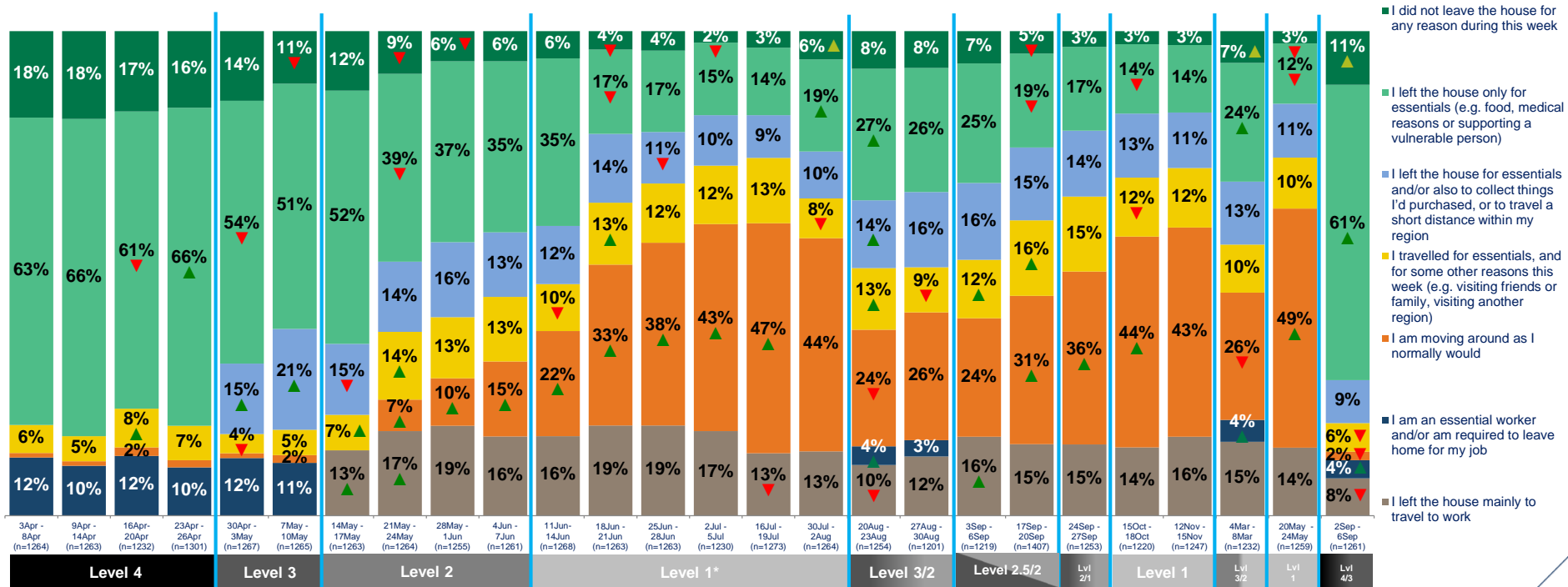
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- 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.
- With much of the country under level 4 conditions in the preceding week, New Zealanders restricted their movement at rates comparable to April and May of 2020.
- Only 2% claimed to be moving around as normal, with about 12% travelling only for work either as essential workers in Auckland or due to lower restrictions elsewhere. A similar proportion claimed that they did not leave the house at all during the preceding seven days.
- Despite higher restrictions in Auckland, the proportion at least partially self isolating was only 10 points higher than the country as a whole. Previous localised lockdowns have seen a much more pronounced difference (for example, the gap in March was approximately 28 points).



With much of the country under alert level 4 for the preceding week, the proportion at least partially self-isolating was comparable to April 2020

Isolation – travel behaviour



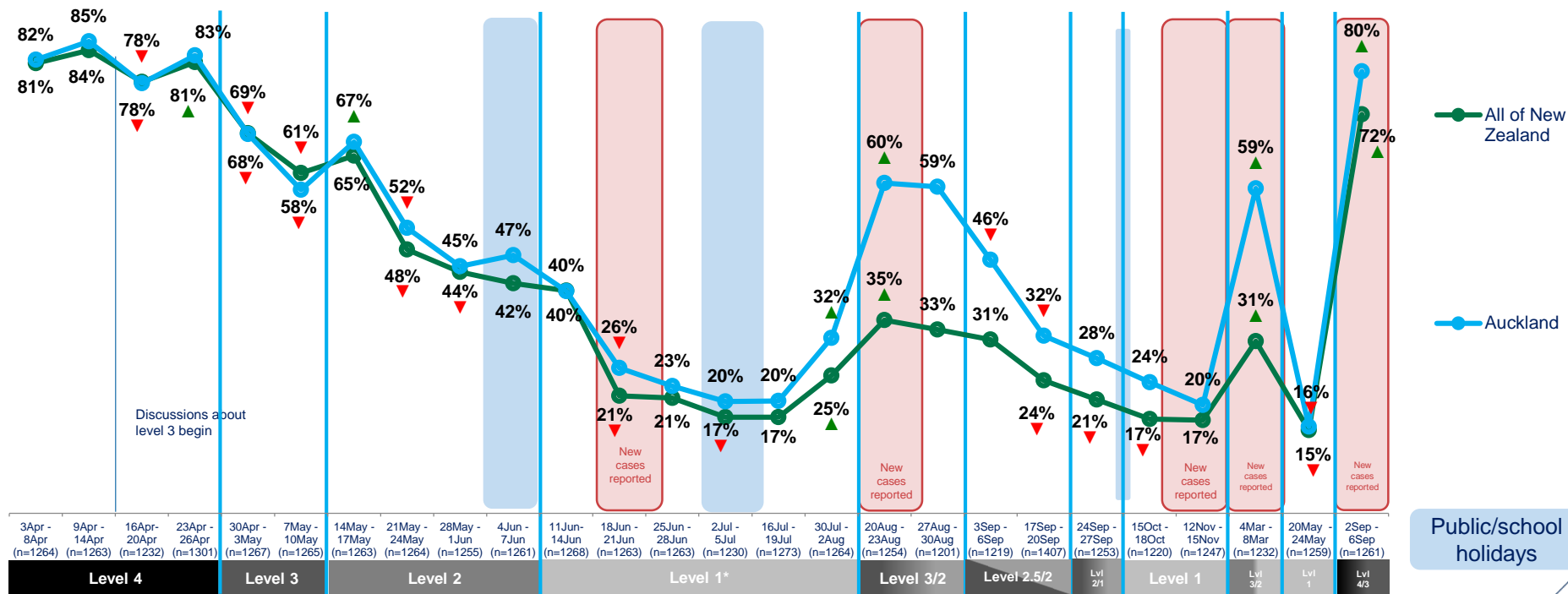
ISO_1_TRAVEL Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 4



The proportion staying home in Auckland reflected its status as the only region under level 4 conditions for the full week

Self-isolation over time – all at least partially self isolating



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

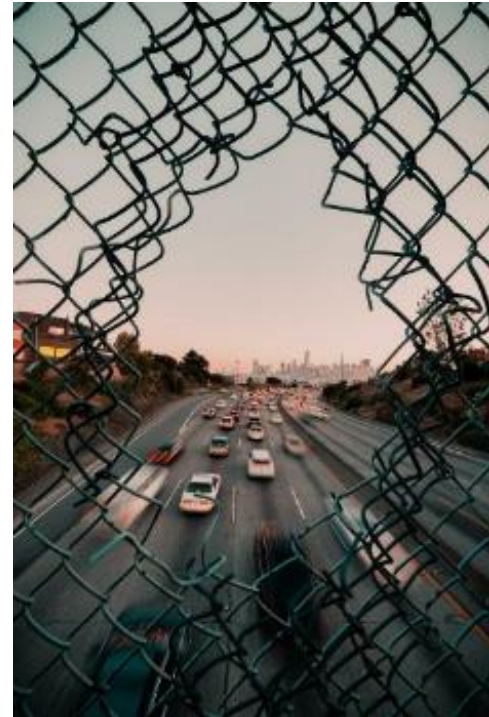


Section 5 – Journeys and mode usage

Key findings – local and domestic journeys

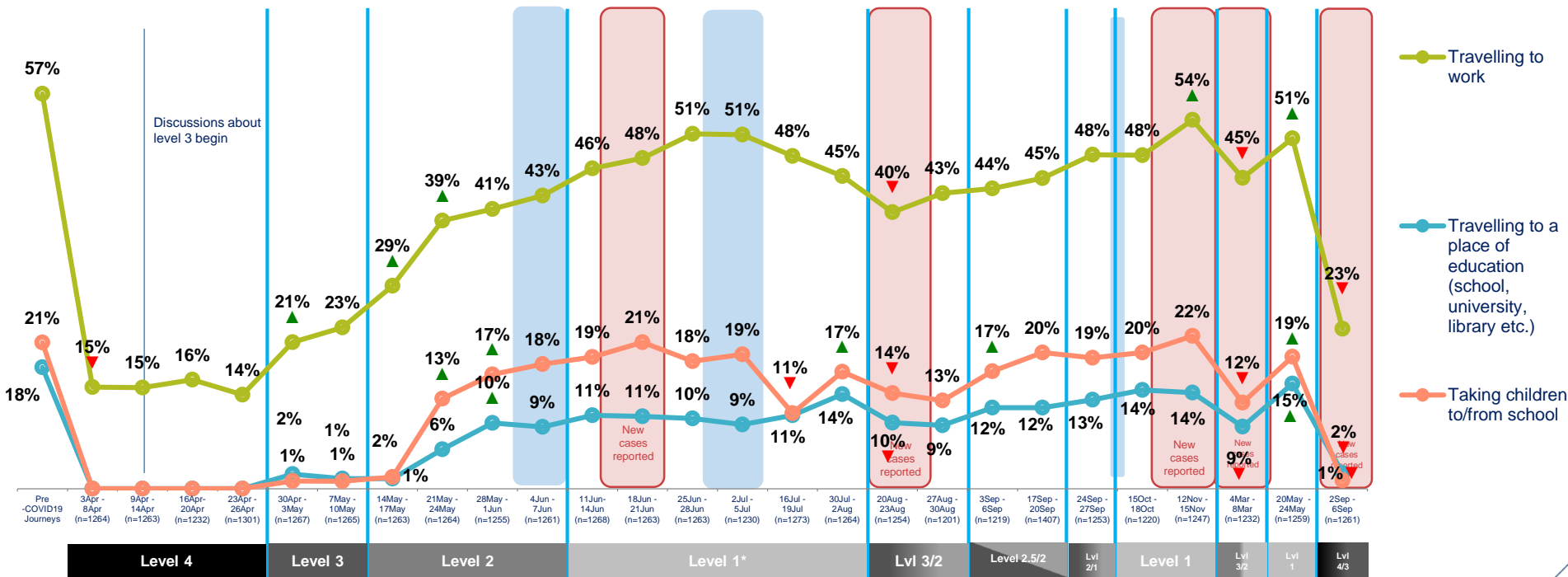
Waka Kotahi objective – how is travel changing?

- 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.
- For the first time since April 2020, all of New Zealand has recently experienced alert level 4 conditions, with travel restricted primarily to essential journeys only, and Auckland still under these conditions.
- Frequent essential journeys like work and education related journeys dropped significantly to rates seen during the initial alert level 3 conditions, with around 23% reporting that they'd travelled for work.
- Despite a significant drop from May, grocery shopping journeys continued to take place at a higher rate than in comparable periods of restriction, as did medical appointments (which may have been impacted by some travel for testing and vaccinations).
- A large proportion of New Zealanders reported that they were undertaking some non-essential journeys, but this was at the lowest level recorded so far, with close to two in five taking no such journey.
- Public transport and private vehicle usage were negatively impacted by the restrictions, with significant decreases in weekly usage of both mode types, although this drop was largest for PT, with about a third the rate of weekly usage reported compared to May
- Active mode travel actually experienced some directional growth compared to May and was seemingly less impacted by travel restrictions.



Nationally, the new lockdown drove a drop in all daily essential journeys, with only 23% reporting any work travel, comparable to national L3 conditions in May 2020

Frequent 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 – 25 (n= between 1,230 – 1,407)



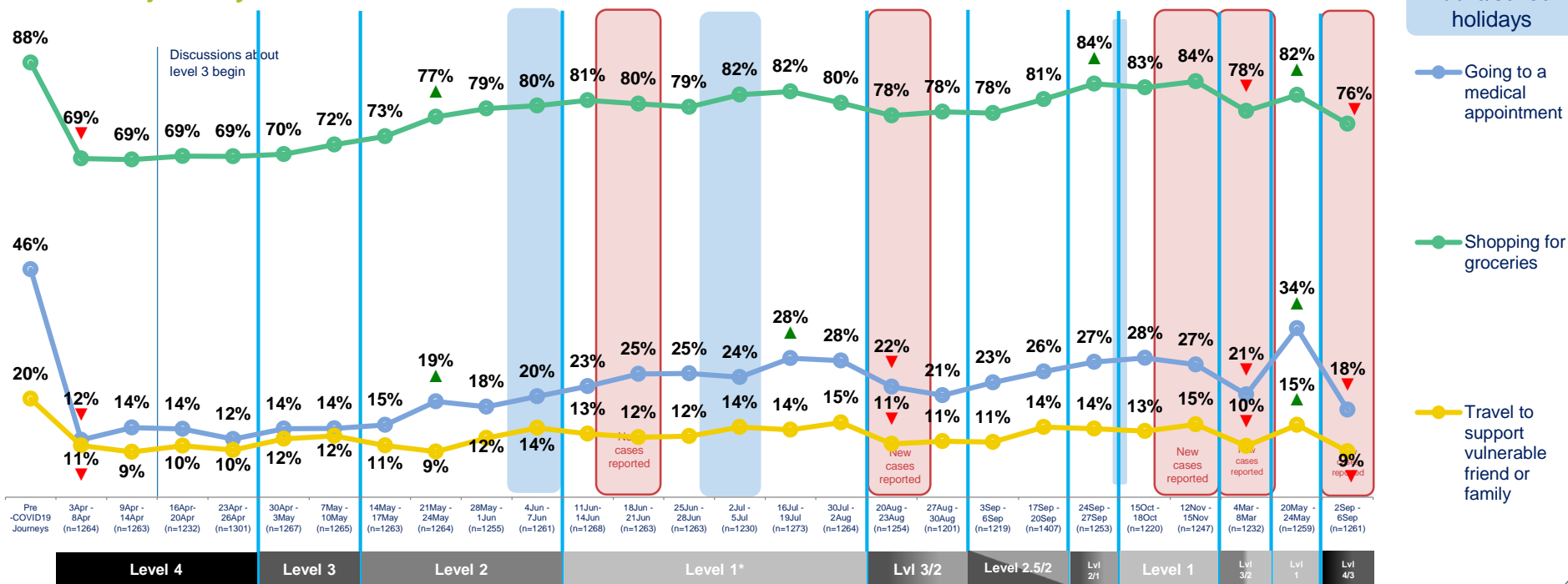
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Journeys like grocery shopping and medical appointments followed the sort of trajectory that might be expected given previous experience of similar lockdowns

Current journeys



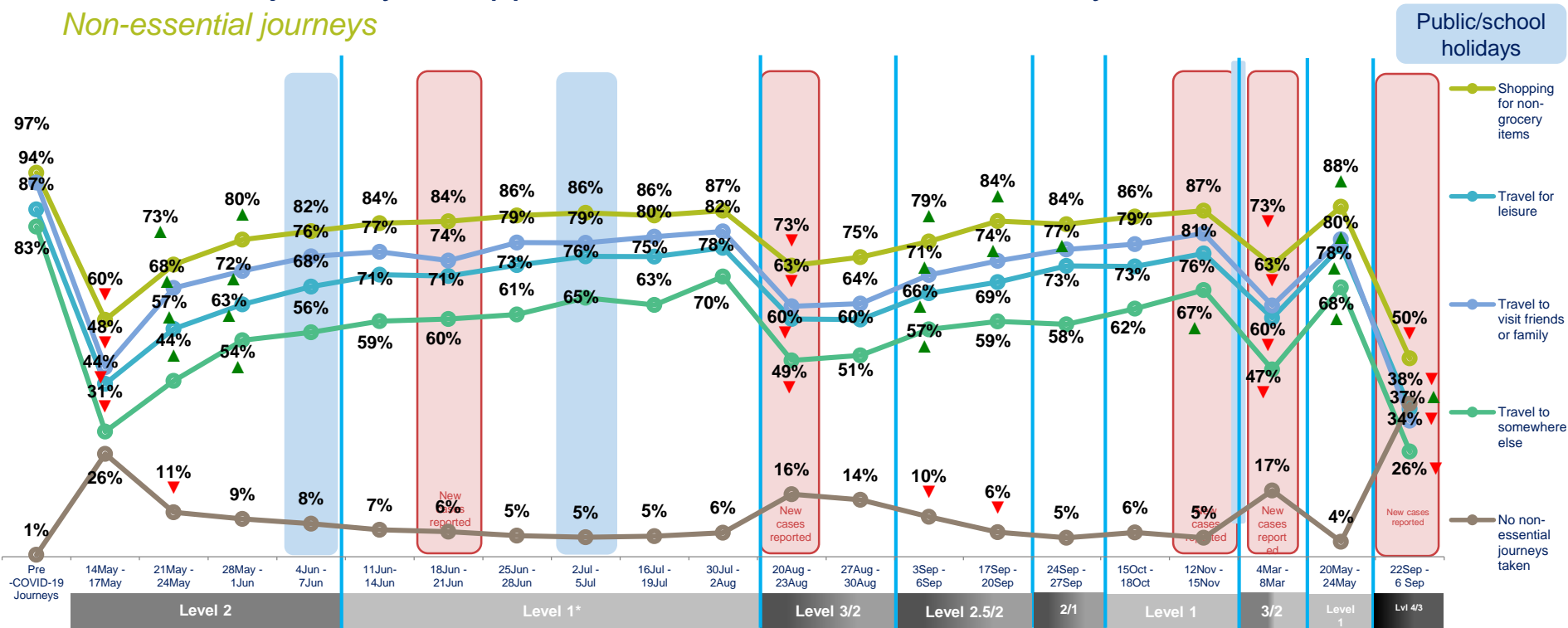
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 - 25 (n= between 1,230 - 1,407)



This is the first time that these journeys have been tested under level 3 or 4 and while these journeys dropped to their lowest incidence, they did not reach zero

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 since initial alert level 2 in New Zealand (c. 1,200 per wave)



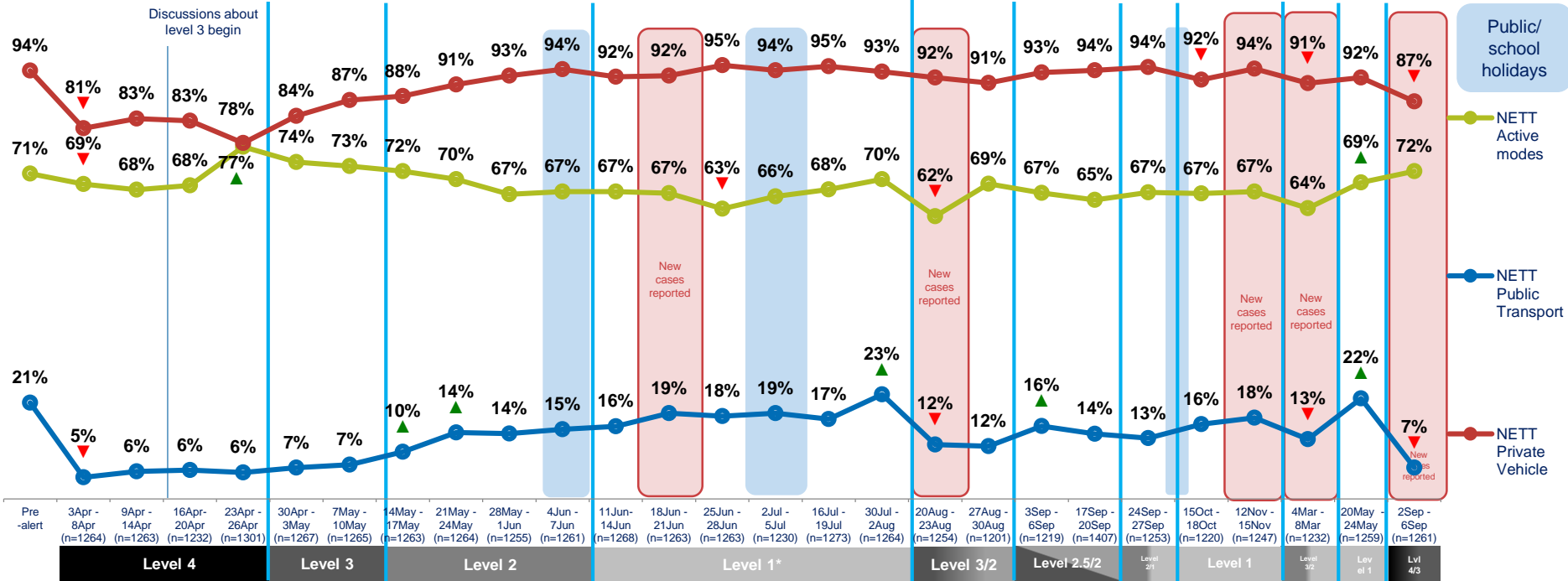
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Active mode travel remained resilient during the latest lockdown, with many choosing to walk for the journeys they did take instead of driving or using public transport

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?


Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 25 (n= between 1,230 – 1,407)



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period



Section 6 – Active modes and quiet streets

Key findings – active modes & quiet streets

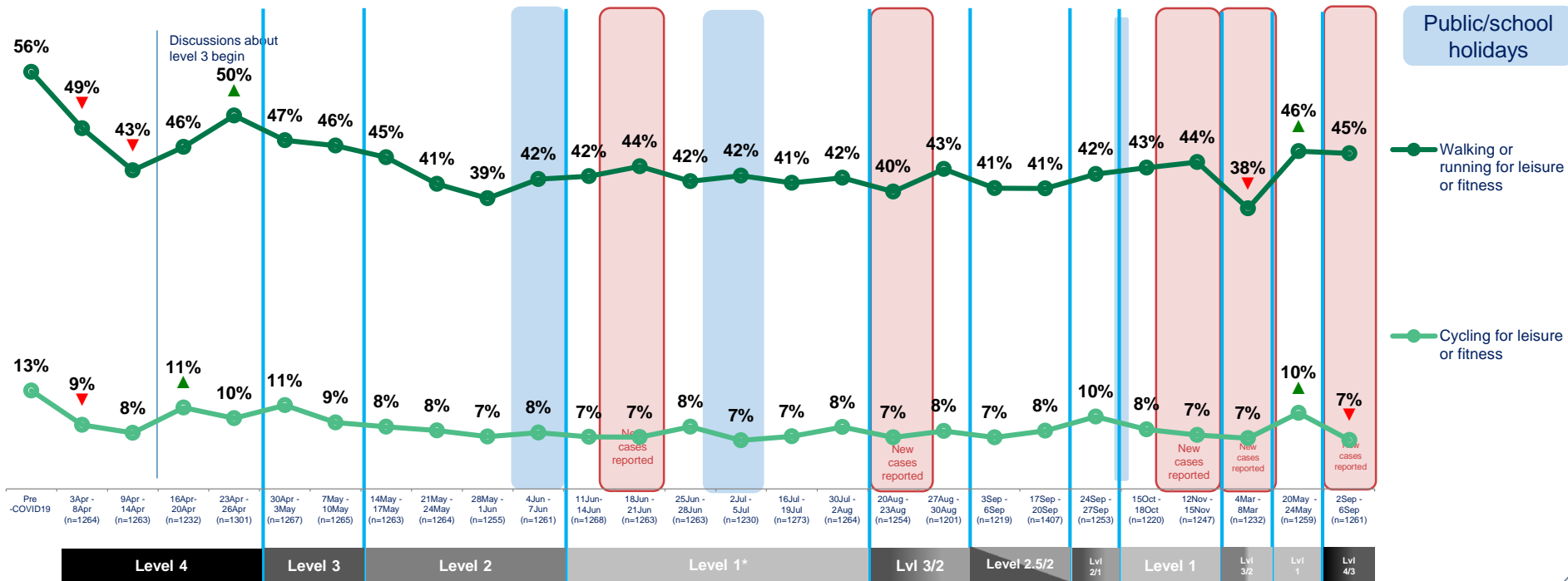
Waka Kotahi – why is travel behaviour changing?

- Initial lockdowns in 2020 saw some increases in active mode travel, as well as walking, running and cycling for leisure. With New Zealand once again experiencing similar conditions at a national level, it is valuable to once again observe how this changes the local environment and what impact this has had.
- Walking running and cycling for leisure did not increase compared to the previous research wave in May, with cycling actually decreasing significantly.
- However, the proportion choosing to walk for at least one journey a week increased directionally to rates not seen since the first national L3 lockdown.
- Compared to 2020, the perception that streets are a more enjoyable environment have significantly softened, with two key changes: a statistically significant increase in the proportion citing no change and a significant 10 point decrease in those giving the highest rating for enjoyability.
- The absence of cars or traffic continues to be the big driver of perceptions that streets are more enjoyable. However, it is notable that, over time the perceptions related to a positive community feel seem to have lessened somewhat.
- Those enjoying streets less were primarily impacted with issues of crowding on footpaths and cycleways. There seems to be a little more difficulty when it comes to footpaths, with almost twice the proportion reporting distancing as difficult on these, compared to cycleways.



In general, walking and cycling for leisure have not varied substantially since the initial lockdowns and the proportion cycling actually dropped significantly, compared to May

Current journeys



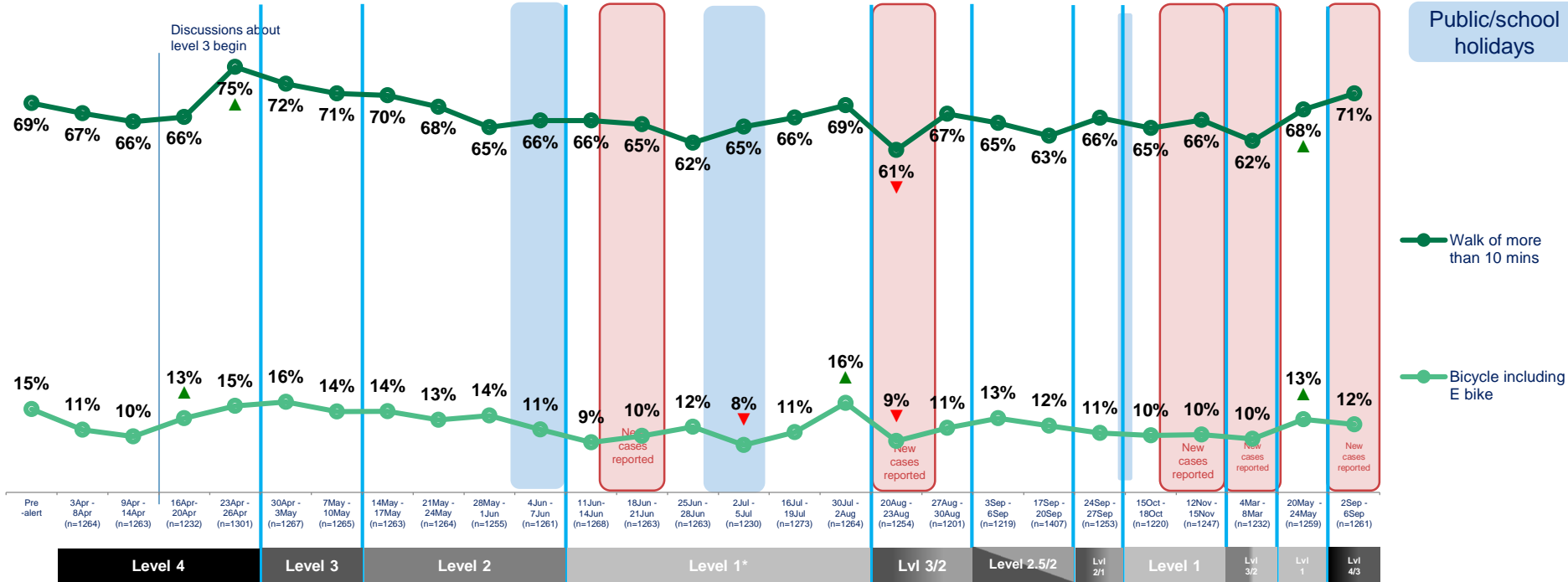
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 25 (n= between 1,230 – 1,407)



However, active mode travel reached rates comparable to initial level 3 lockdown, driven primarily by the proportion walking for their essential journeys

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?

Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 24 (n= between 1,230 – 1,407)



Indicates a statistically significant increase from previous time period

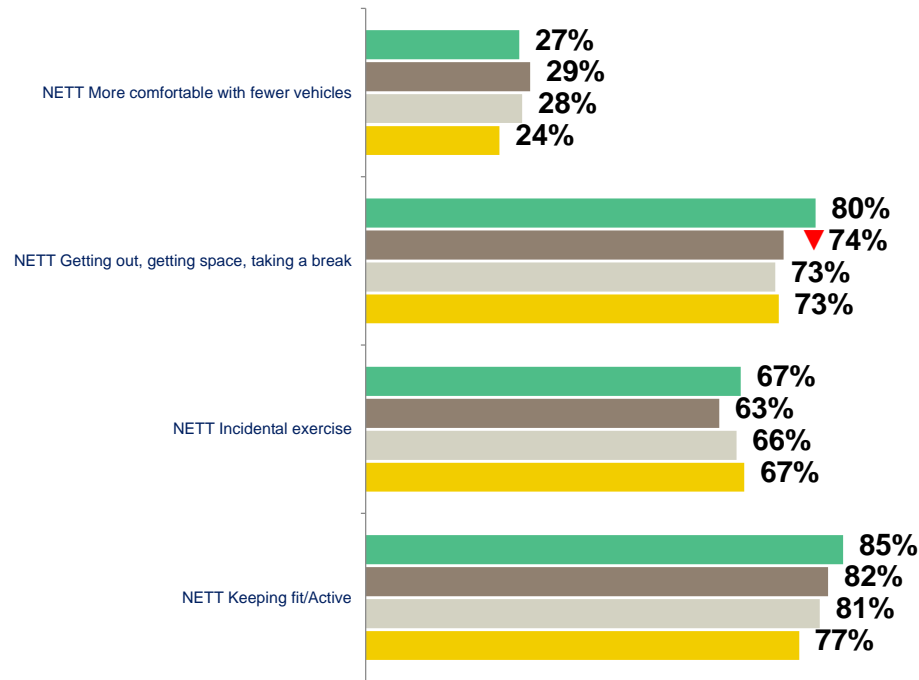
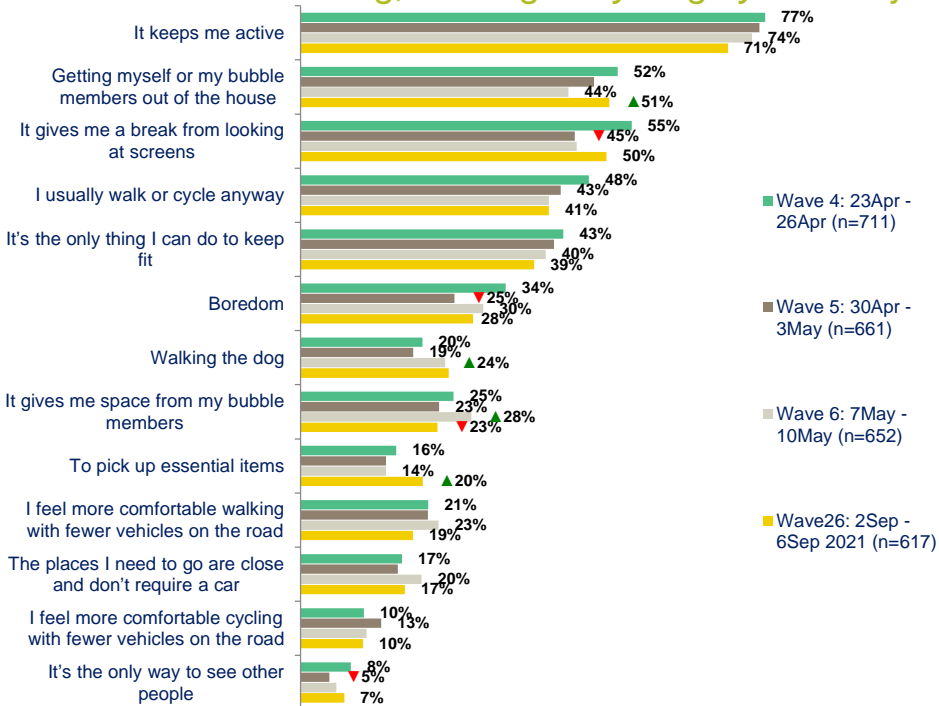


Indicates a statistically significant decrease from previous time period

Compared to last year, there was no significant change in the motivations for getting exercise, except for incidental trips for essentials and a desire to get out of the house

Reasons for walking, running or cycling by current journeys

Primary themes



QST3. What are the main reasons that you choose to walk, run or cycle for fitness, leisure, or transport at the moment?

Base: New Zealanders who in the past seven days walked or cycled for fitness



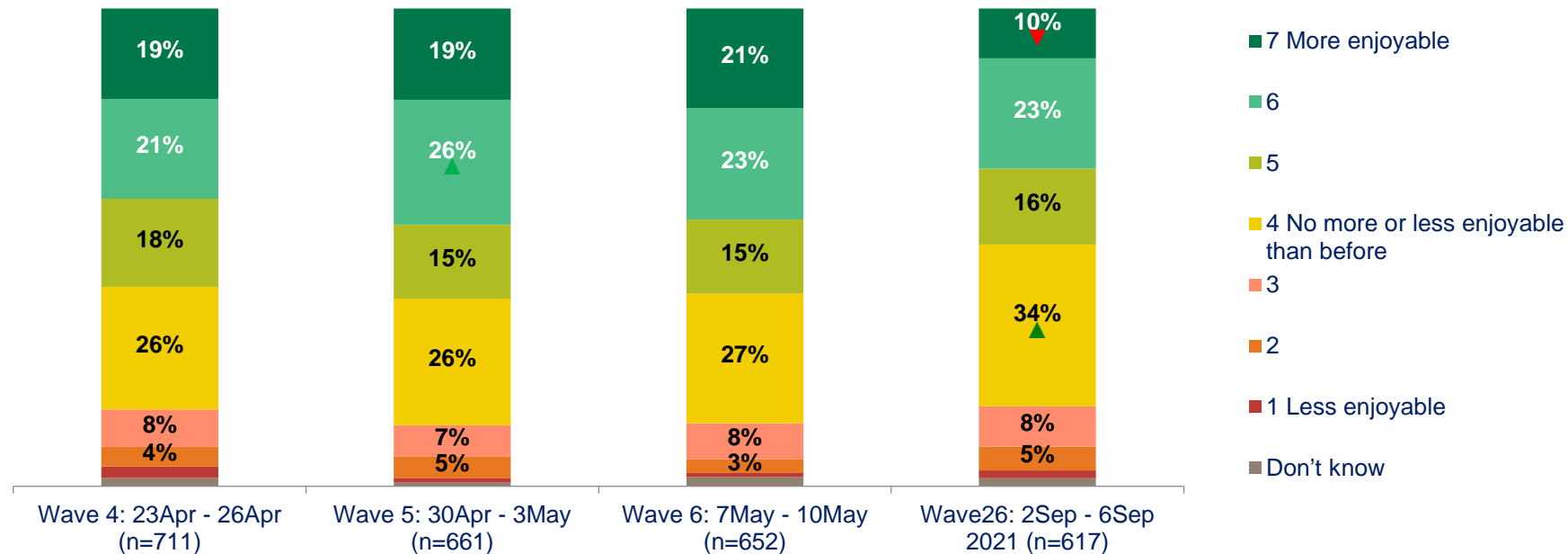
Indicates a statistically significant increase against total population



Indicates a statistically significant decrease against total population

Compared to last year, the perception that streets are more enjoyable has declined, with a third now saying that they're around the same as before

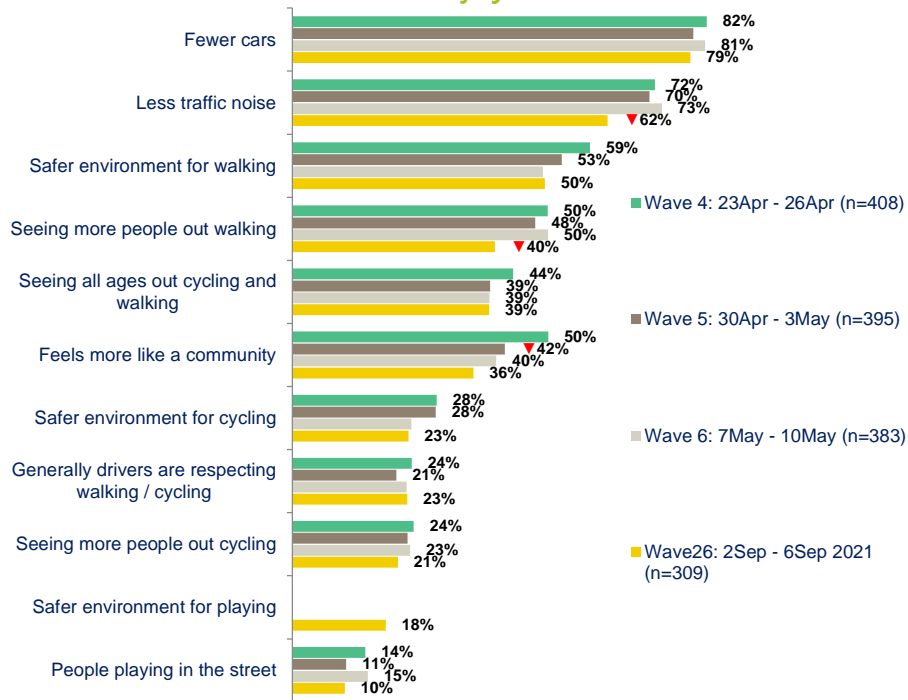
Enjoyment of streets and roads during lockdown



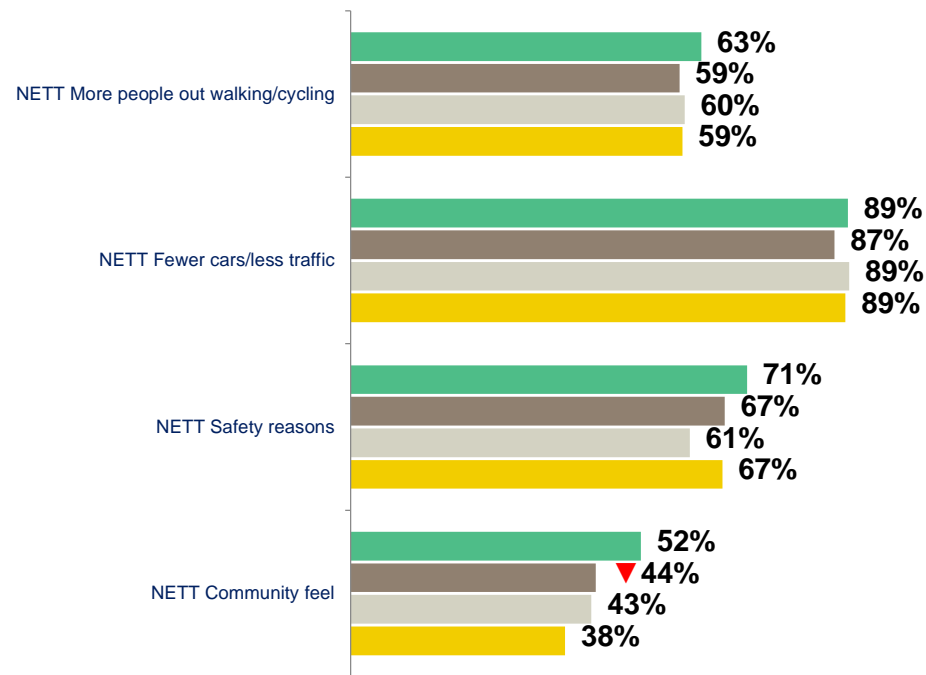
QST1. Thinking of the roads and streets where you are walking or cycling, are you finding being in these environments more or less enjoyable during level 4?
 Base: those who have been outside walking/running or cycling during level 4

A notable difference over time for those saying streets are more enjoyable has been a decline in community feel sentiments as a factor

Reasons streets more enjoyable



Primary themes



QST2A. What are the main reasons that you are finding walking / running or cycling on roads and streets more enjoyable now?

Base: those who are finding walking/running or cycling more enjoyable now



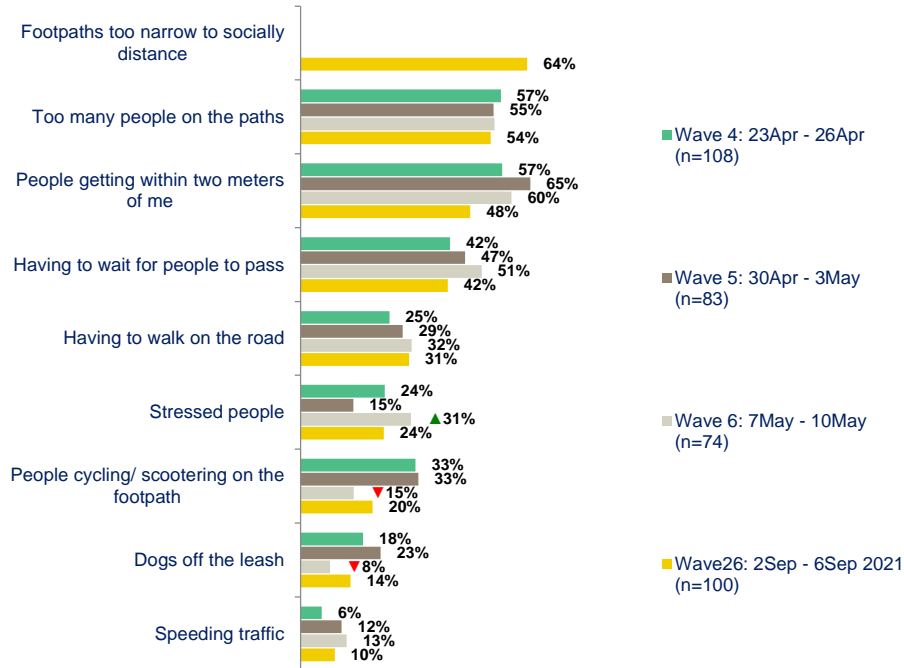
Indicates a statistically significant increase against total population



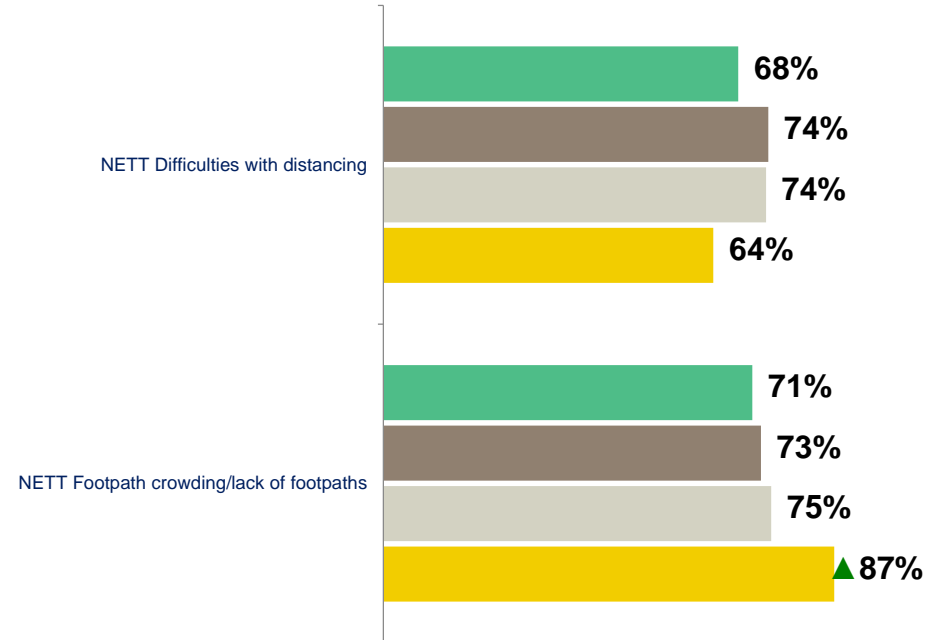
Indicates a statistically significant decrease against total population

Although it was asked for the first time this wave, the role of narrow footpaths is the biggest negative factor impacting New Zealand streets

Reasons streets less enjoyable



Primary themes



QST2B. What are the main reasons that you are finding walking / running or cycling on roads and streets less enjoyable now?

Base: those who are finding walking/running or cycling less enjoyable now



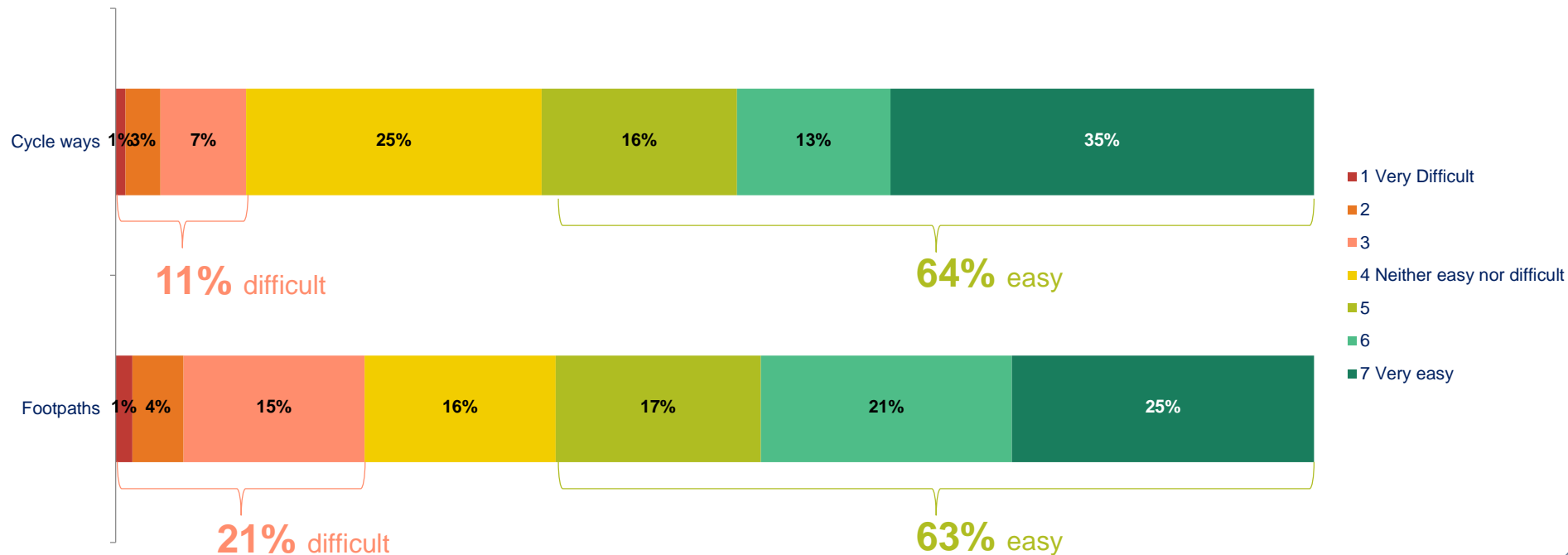
Indicates a statistically significant increase against total population



Indicates a statistically significant decrease against total population

Perceived ease of distancing is mostly high, although those on footpaths seem a little more likely to have some difficulty, and less likely to find it very easy

Ease of social distancing



QST4. When you are out and about walking or cycling in your area at current alert levels, how easy do you find it to socially distance on....

Base: those walking or running for leisure or exercise (n=587) all cycling for leisure or exercise (n=97)



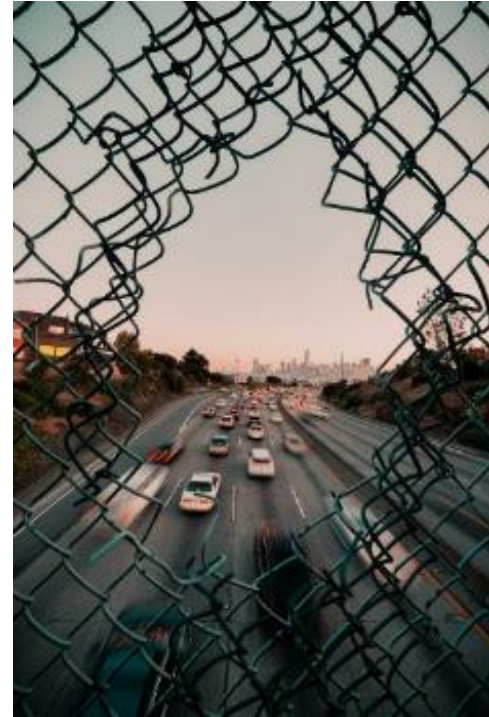


Section 7 – Public transport

Key findings – public transport

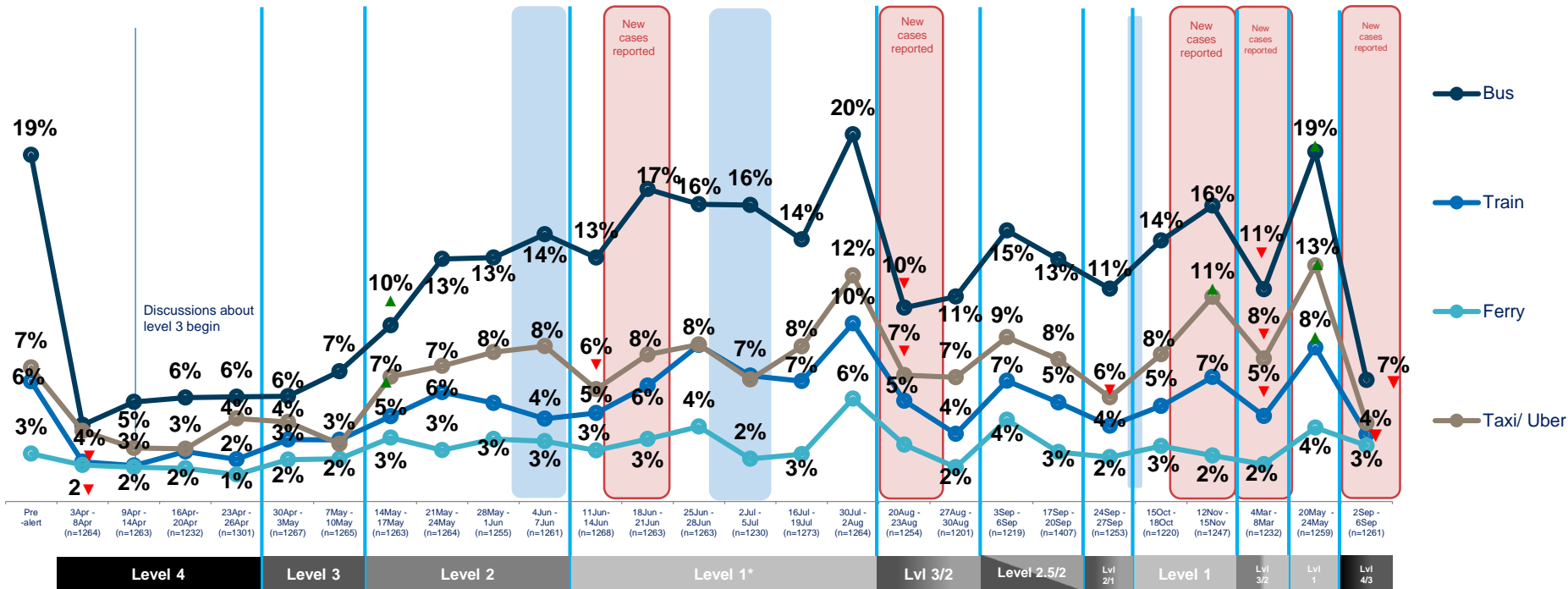
Waka Kotahi objective – how and why is travel changing?

- 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.
- As has often been the case, the impact of lockdown restrictions on public transport usage was more pronounced than for other modes, with weekly public transport usage down to about a third the level recorded in May.
- All modes of public transport saw a decrease in stated past week usage, with the difference to May most significant for buses and trains.
- Taxi usage also dropped a statistically significant 9 points during this most recent lockdown.
- The main cause of this change appears to be the lack of travel in general by public transport users. Compared to May, when New Zealand was at alert level 1, the proportion saying that they are just travelling less in general jumped from 35 to 51% and there were few indicators of mode shift occurring for journeys, with fewer mentions for these causes compared to the previous wave.
- This is supported by the increase in *reduced alert levels* as a trigger for returning to public transport, 69% selected this option during the most recent wave compared to 24% in May.
- There has been no change over time on the impact of masks on people's willingness to use public transport.
- Looking into sub-groups of the population, people who would normally use public transport are most positively impacted by mask mandates, with 40% saying that this makes them more likely to use public transport. New Zealanders with disabilities are also more likely to use public transport as a result of masks being mandatory, with 37% saying so.
- However, people who are more COVID-19 vulnerable are no different from the general population when it comes to how masks impact their public transport usage.



Almost all modes of public transport were significantly impacted by the new lockdown, having previously matched or exceeded pre-lockdown weekly usage rates

Changes in mode usage by wave - national



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 – 25 (n= between 1,230 – 1,407)



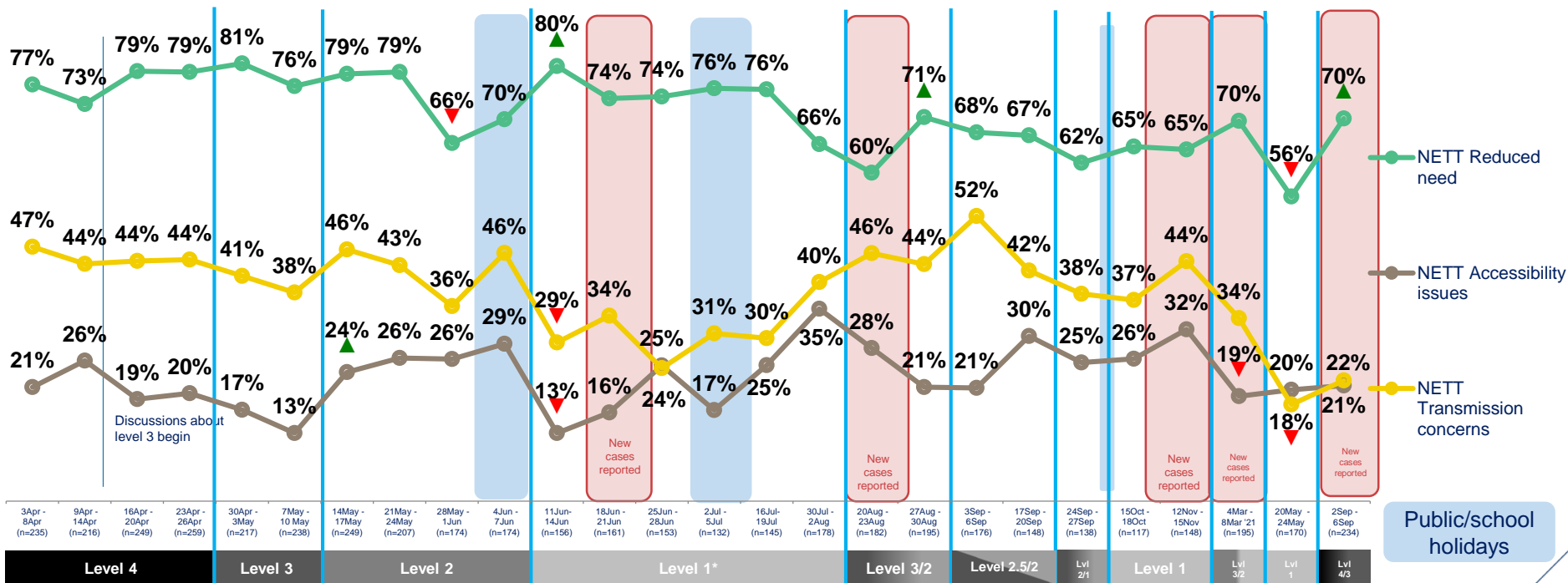
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

With significant travel restrictions in place, the primary reasons that people stayed off public transport during this week were simply not needing to travel

Reasons for decrease in PT activity

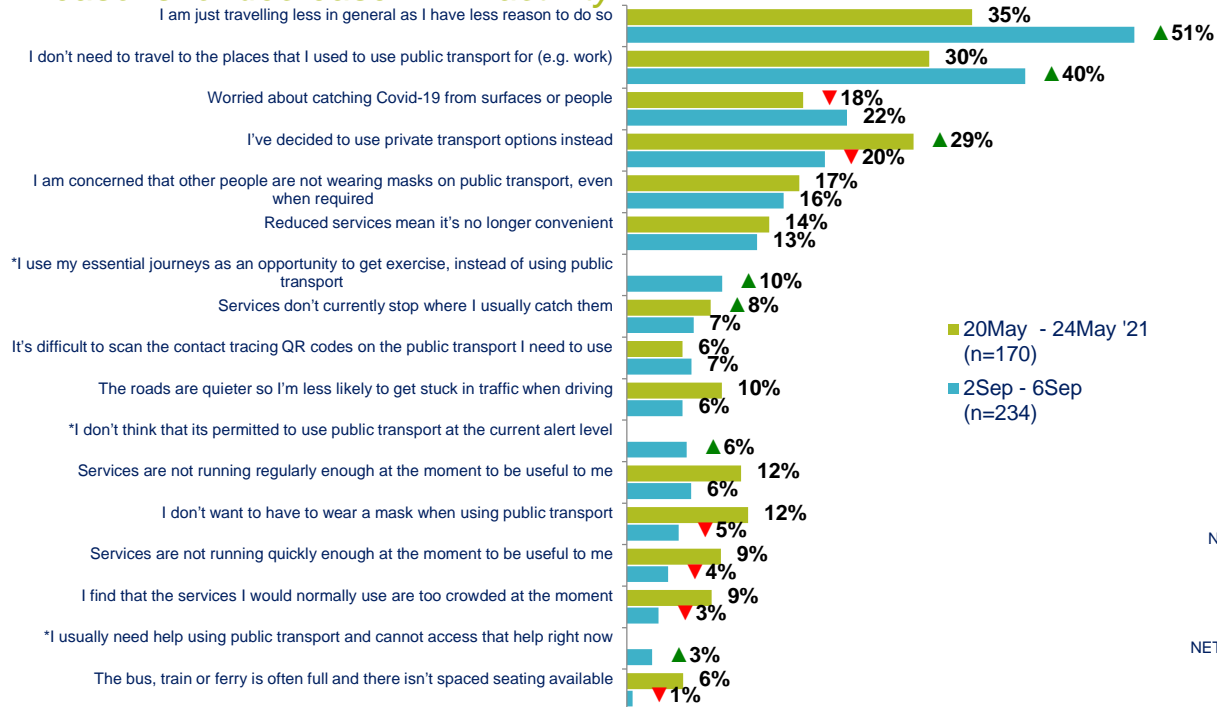


QDEC - For which, if any of the following reasons, has your use of public transport decreased?

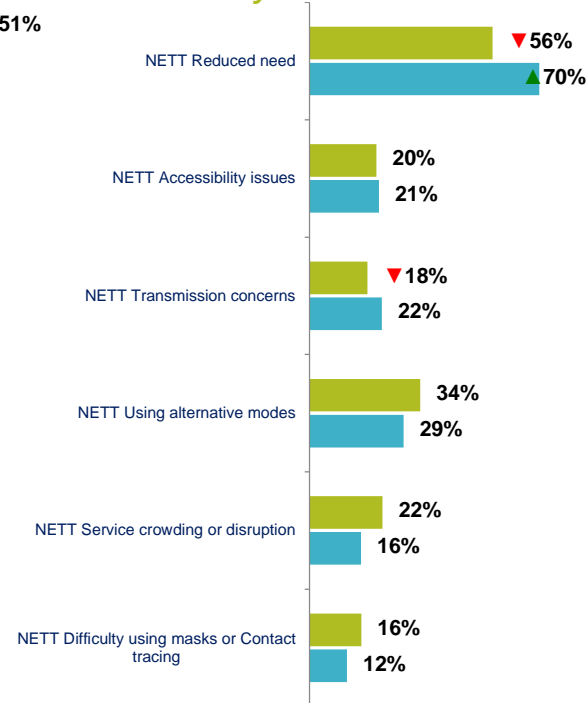
Base: all decreasing PT usage in past week compared to March 2020

It appears that in higher levels of lockdown, passenger reduction is primarily related to reductions in travel and mode-shift (eg to private vehicles) isn't too common

Reasons for decrease in PT activity



Primary themes



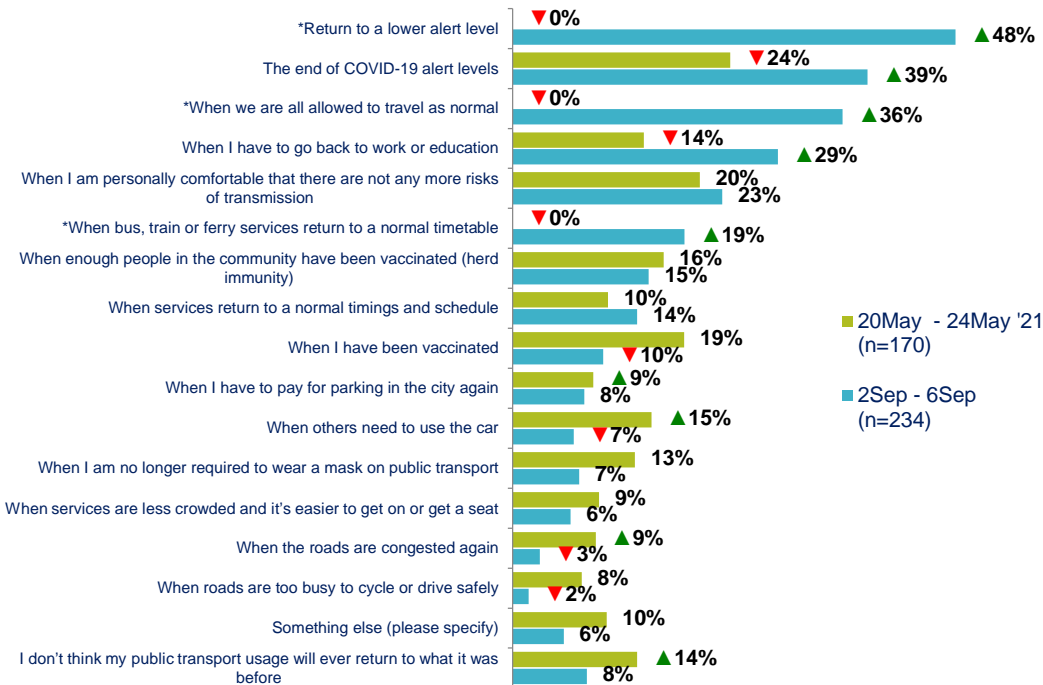
QDEC For which, if any of the following reasons, has your use of public transport decreased?

*barrier not included in May code list as not relevant under alert level conditions

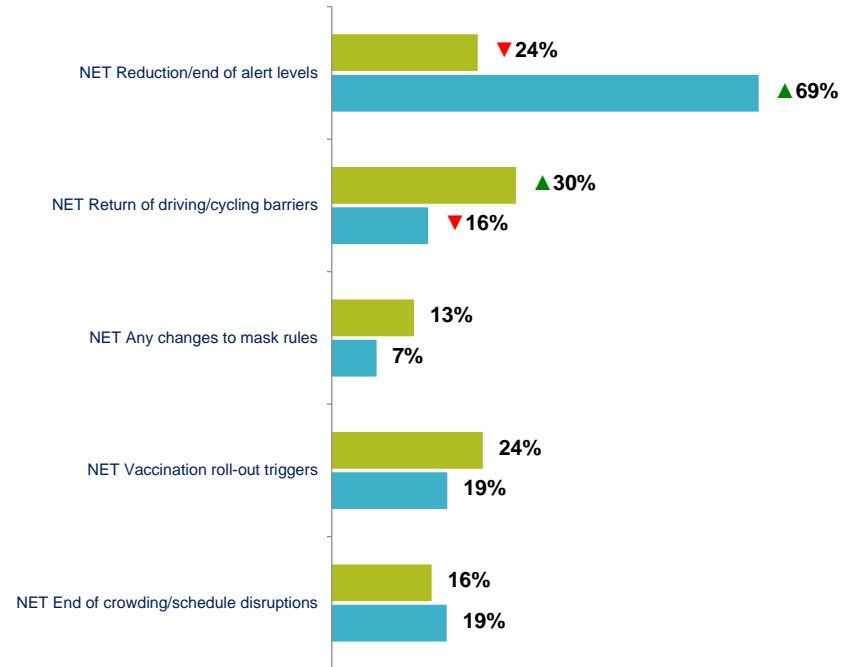
Base: all who have decreased PT usage in past week compared to pre-lockdown frequency

The majority of those limiting PT usage this week indicate that they'll return to normal when current lockdown restrictions are lifted

Triggers for return to PT usage



Primary themes



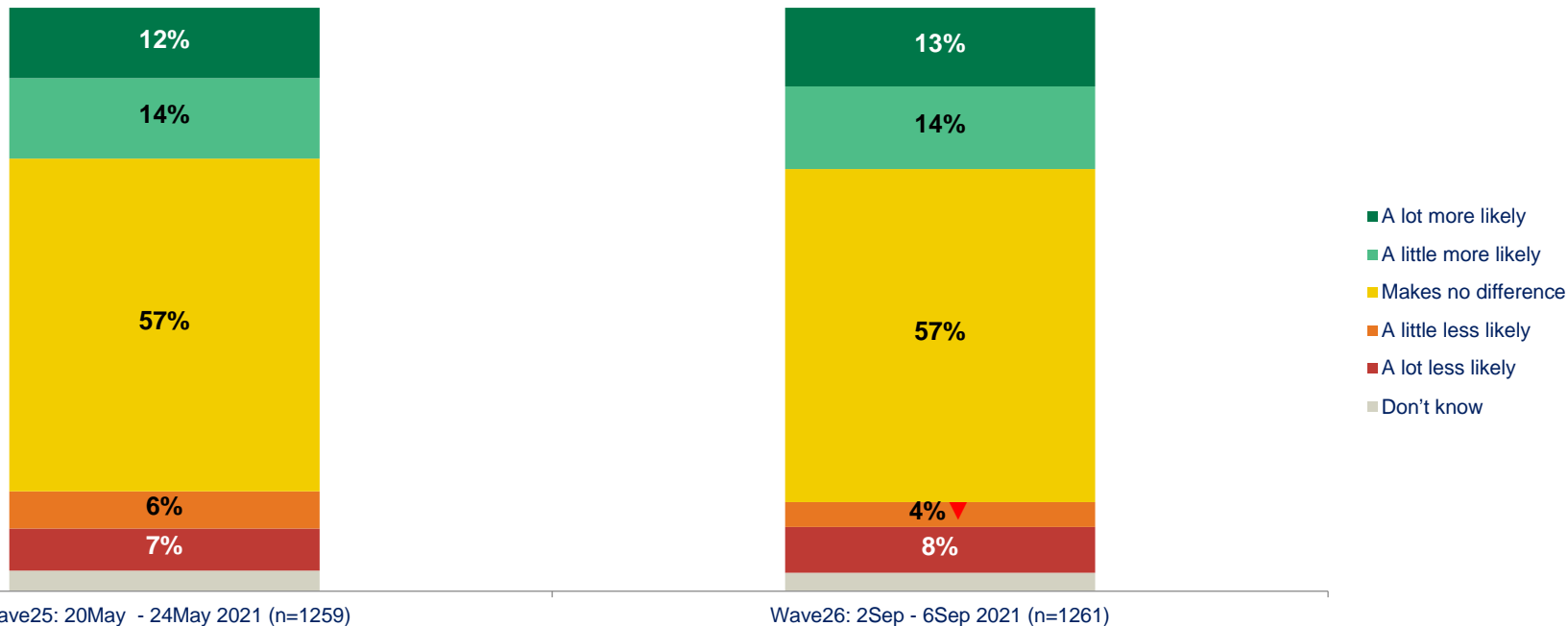
QDEC2 Which, if any of the following would encourage you to start using public transport as much as you used to?

*trigger not included in May code list as not relevant under alert level conditions

Base: all who have decreased PT usage in past week compared to pre-lockdown frequency

While mask issues were less likely to be cited as barriers this wave, the stated impact of mask mandates on PT are unchanged from May

Impact of masks on public transport usage



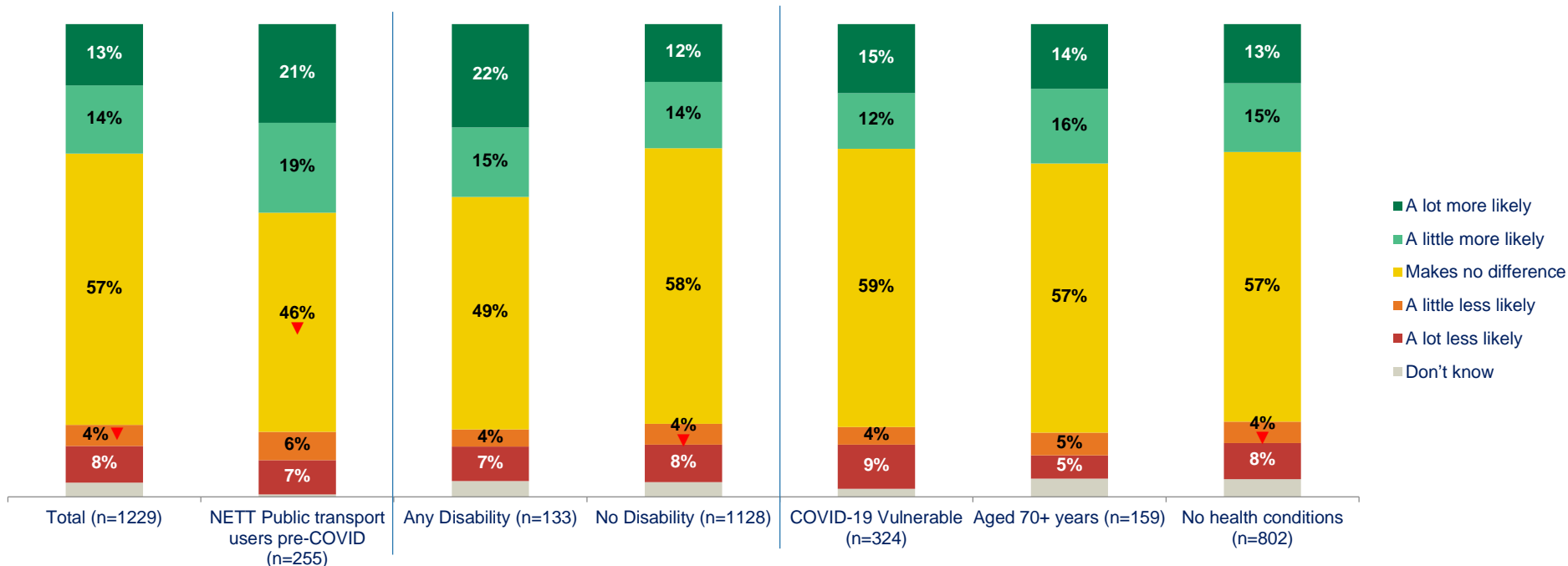
QMASK5. As you may be aware, anyone travelling on public transport in New Zealand is currently required to wear a mask or face covering whilst they are on the bus, train or ferry. To what extent does this rule make you more or less likely to use public transport, or does it make no difference?

Base: all adults 15+ in New Zealand



Habitual PT users and those with disabilities indicate that mask mandates have a more positive impact on their usage, compared even to the COVID-vulnerable

Impact of masks on public transport usage by normal usage, disability and vulnerability



- A lot more likely
- A little more likely
- Makes no difference
- A little less likely
- A lot less likely
- Don't know

QMASK5. As you may be aware, anyone travelling on public transport in New Zealand is currently required to wear a mask or face covering whilst they are on the bus, train or ferry. To what extent does this rule make you more or less likely to use public transport, or does it make no difference?

Base: all adults 15+ in New Zealand in wave 26



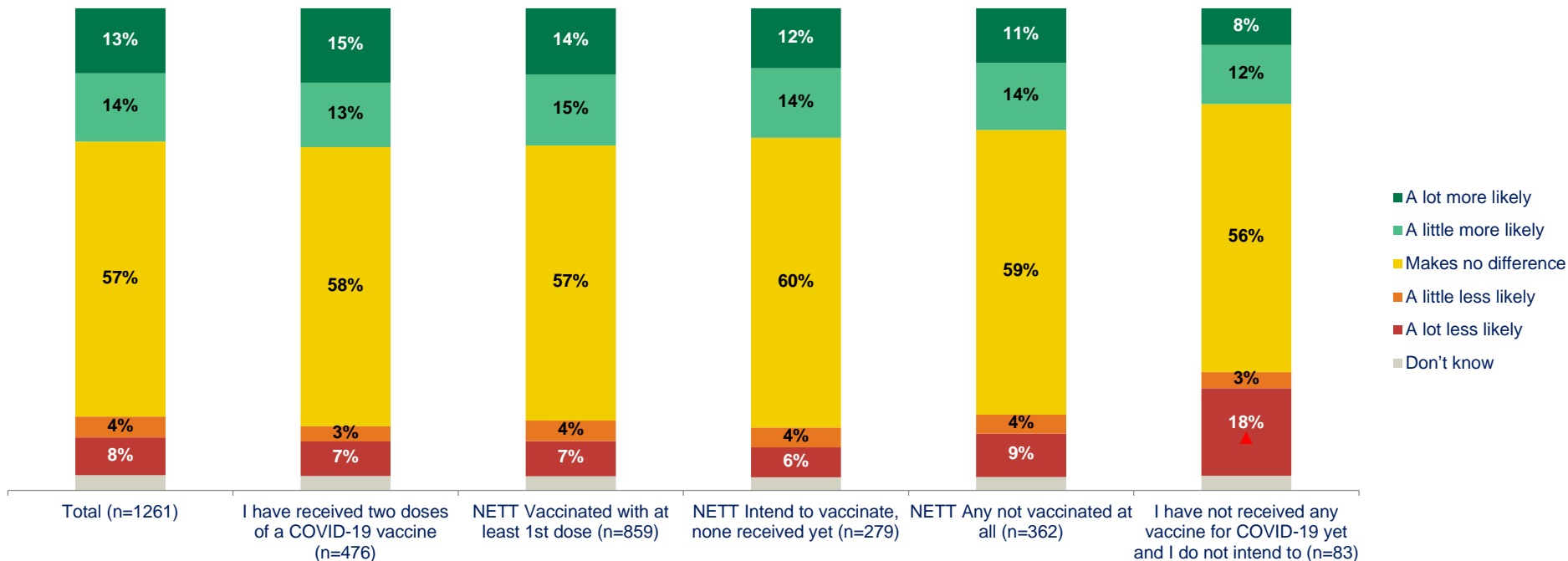
Indicates a statistically significant increase against total sample



Indicates a statistically significant decrease against total sample

Those not intending to vaccinate are the only group that are significantly less likely to use public transport in light of masks being mandatory

Impact of masks on public transport usage by vaccination status



QMASK5. As you may be aware, anyone travelling on public transport in New Zealand is currently required to wear a mask or face covering whilst they are on the bus, train or ferry. To what extent does this rule make you more or less likely to use public transport, or does it make no difference?

Base: all adults 15+ in New Zealand in wave 26





Section 8 – Working from home

Key findings – working from home

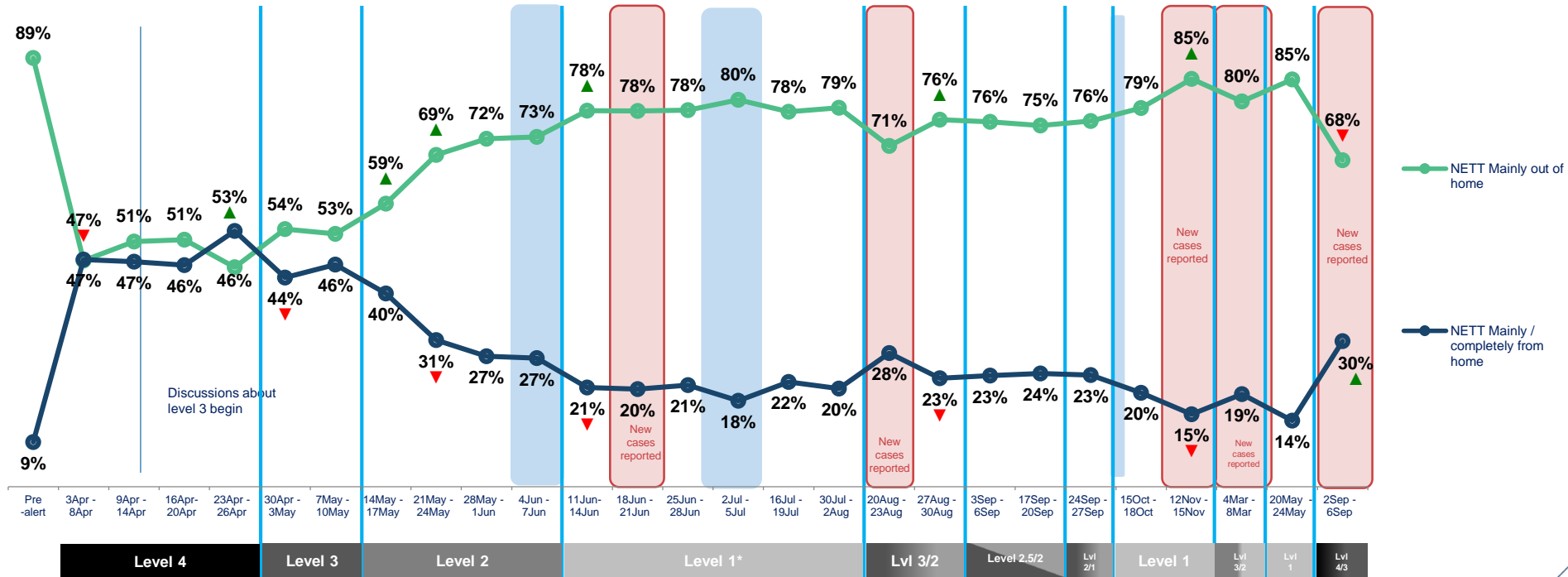
Waka Kotahi objective – understanding behaviour change

- 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.
- The new lockdown has meant that the proportion working from home increased significantly compared to May 2020. However it is not as high as rates seen during the initial lockdown months of 2020.
- The public transport network is still more impacted by people working from home, almost half of habitual public transport commuters were working from home, compared to c. two in five active mode commuters and just one in four private vehicle commuters.
- This is reflected in the types of commuters still on the roads. Roughly 10% of those working from home on each day of the week would normally be taking public transport. Comparatively, no more than 3% of those still commuting on each day of a lockdown week are taking public transport, with public transport commuters almost entirely gone from the network on Sundays.
- As the issue has become more salient to more workers, confidence in abilities to effectively work from home has increased significantly among the NZ working population.
- This is true also of opportunity, with an 11 point increase in workers saying that their workplace has changed how it operates to enable working from home.
- Desire to work from home is a more complex story, since August 2020 the proportion desiring more flexibility has steadily increased, but so too has the proportion who would only like to do so as a last resort. It should be noted that desiring more flexibility does not mean a desire to take up that option more regularly and the two are not mutually exclusive of one another.



New restrictions resulted in a shift towards more people working from home, but as with previous outbreaks, this did not match incidences seen in early lockdowns

Proportion working in and out of home by survey wave



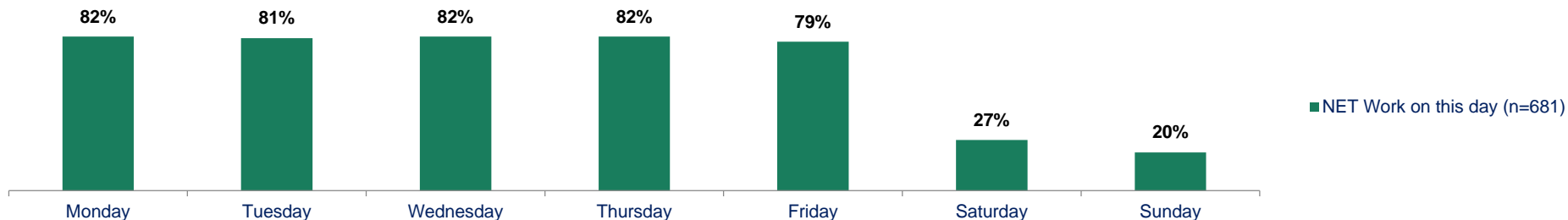
QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?

Base: all adults 15+ who are usually working

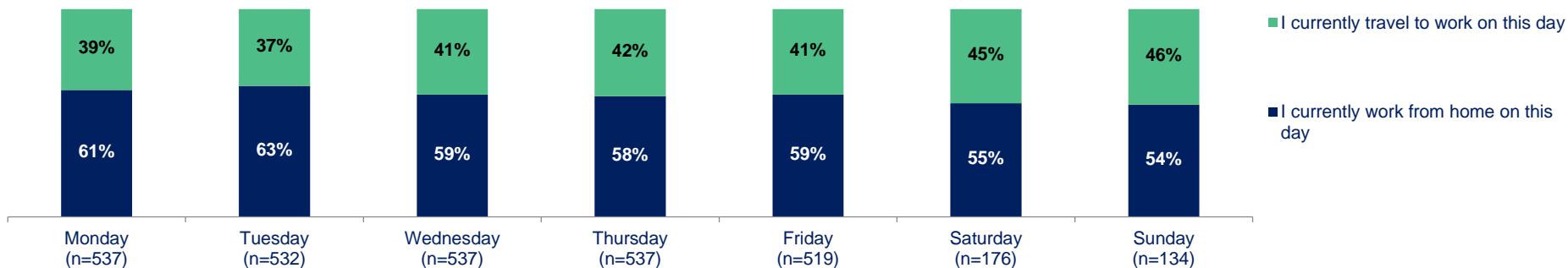


Around 4 in 5 work each weekday, with c.60% of them currently doing so from home; weekends have smaller workforces with directionally higher shares still commuting

Proportion working on each day – latest wave



Share of workforce working from home on each day – latest wave

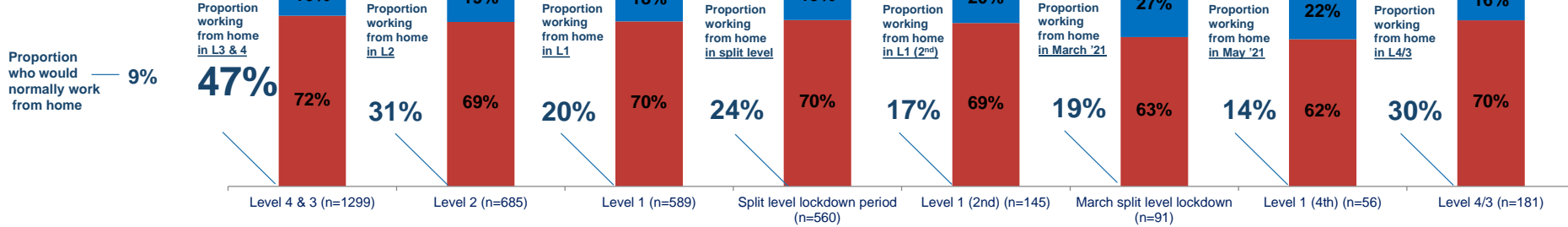


QWORK2E_NEW. Thinking about the last week, for each day, please state your current work travel arrangements:
 Base: all working adults 15+ in New Zealand in wave 26 (2Sep-6Sep); all adults working on each day of the preceding week

As has consistently been the case, the increase in working from home disproportionately impacts those who would travel by PT or active modes

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

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



Proportion of each commuter type working from home

Proportion WFH by level	47%	31%	20%	24%	17%	19%	14%	30%
Within active mode commuters	53%	31% ▼	17% ▼	18%	12%	15%	13%	40% ▲
Within private vehicle commuters	43%	25% ▼	13% ▼	16% ▲	11% ▼	13%	9%	25% ▲
Within public transport commuters	62%	42% ▼	24% ▼	36% ▲	19% ▼	29%	15% ▼	49% ▲

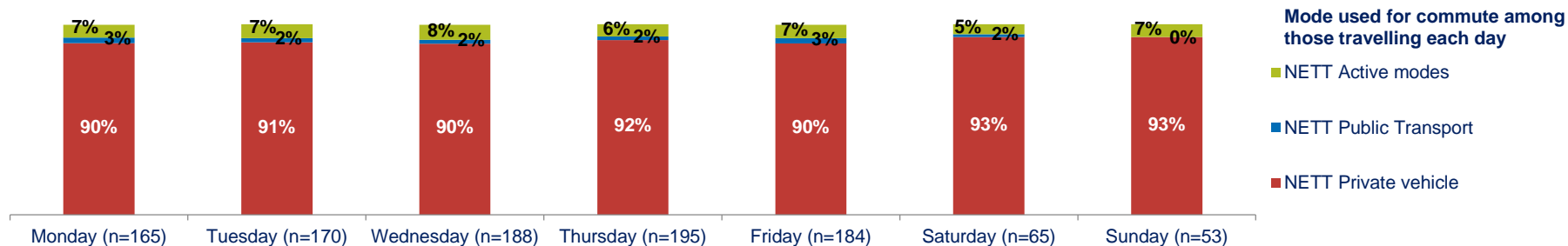
QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work? By QMODE1_1 How would you normally make each of the following types of journeys listed below? – travelling to work

Base: all adults 15+ in New Zealand who normally commute by Active modes in L4&3 (n=292)/L2 (n=256)/ L1 (n=402)/split level (n=324) 2nd L1 (n=141)/ Feb (n=69) | Private vehicle L4&3 (1,748)/L2 (n=2,916)/split (n=2,390)/ 2nd L1 (n=895)/Feb (n=464) | Public transport L4&3 (n=323)/L2(n=295)/L1(n=436)/split(n=314)/ 2nd L1 (n=152)/Feb (n=83*) *low base, interpret with caution

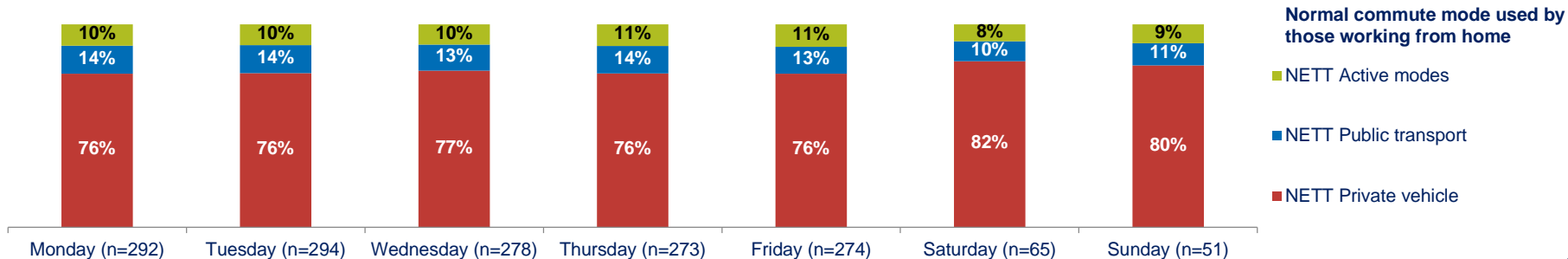


In the past week, 90% or more of retained commuter traffic was by private vehicle, with PT travel for work almost completely removed at weekends

Commuter traffic types still on the network by day



Commuter traffic types lost from the network by day



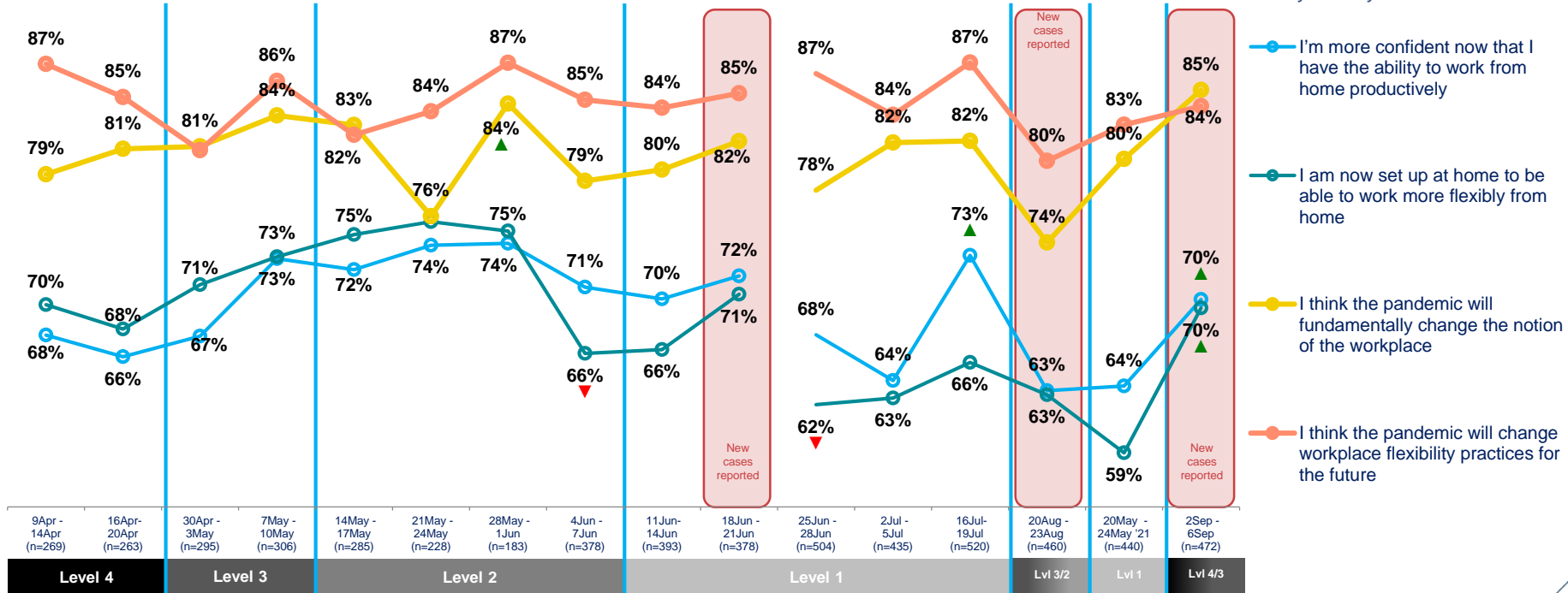
QMODE1/QMODE2. How would you normally make each of the following types of journeys listed below? – travelling to work / How did you make each of the journeys listed below? – travelling to work | QWORK2E_NEW. Thinking about the last week, for each day, please state your current work travel arrangements

Base: all adults 15+ in New Zealand who were in work before lockdown interviewed in waves 17 and 25 who provided detail on work location

Compared to May, the proportion feeling confident about their abilities in working from home increased significantly

Future attitudes to working from home*

*NB: qualification for question changed in June of 2020, broken tracking lines indicate break in continuity of analysis



QWORK6a. Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?

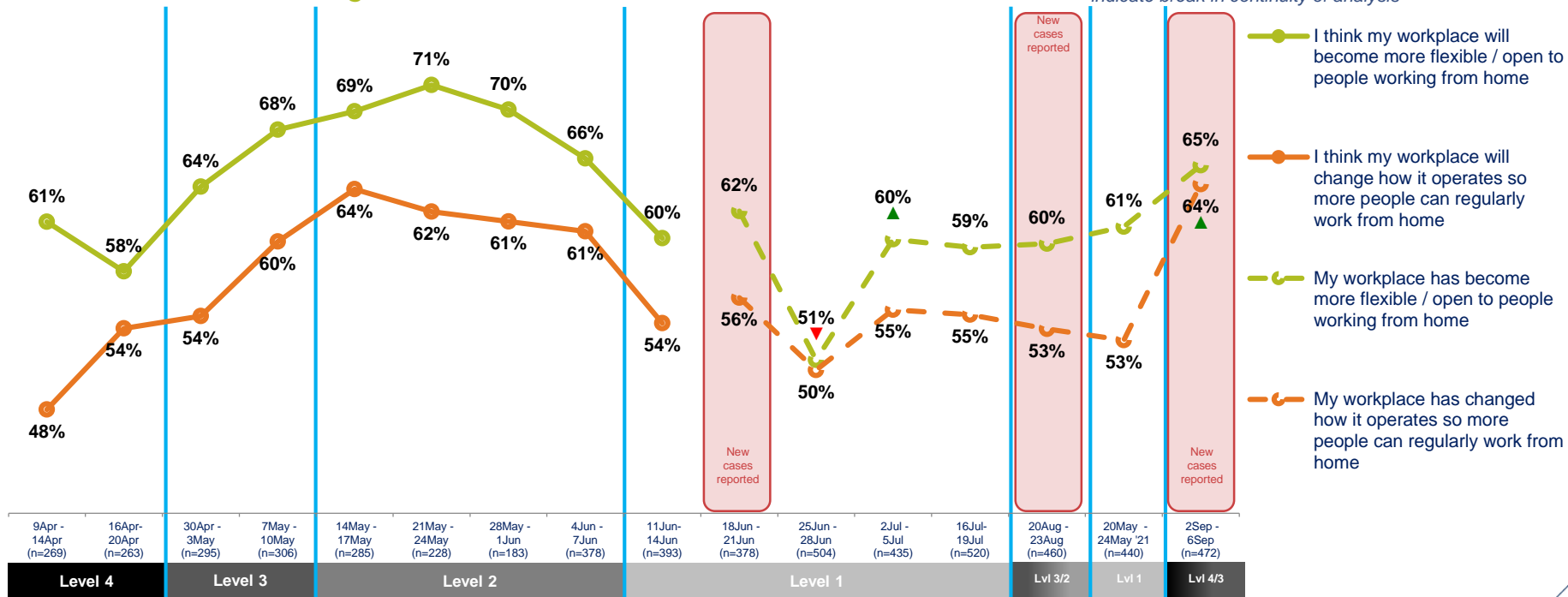
Base: all adults 15+ in New Zealand who were working from home at time of interviewing (9 Apr – 21 Jun); all currently working from home, who had worked from home, or who were able to wfh (from 25 Jun)

*Note change in sample qualifying into survey question over time

From the employer perspective, there was also an increase in worker confidence that their workplace had changed, suggesting that saliency impacts this perception

Future attitudes to working from home*

*NB: qualification for question changed in June of 2020, broken tracking lines indicate break in continuity of analysis



QWORK6a. Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?

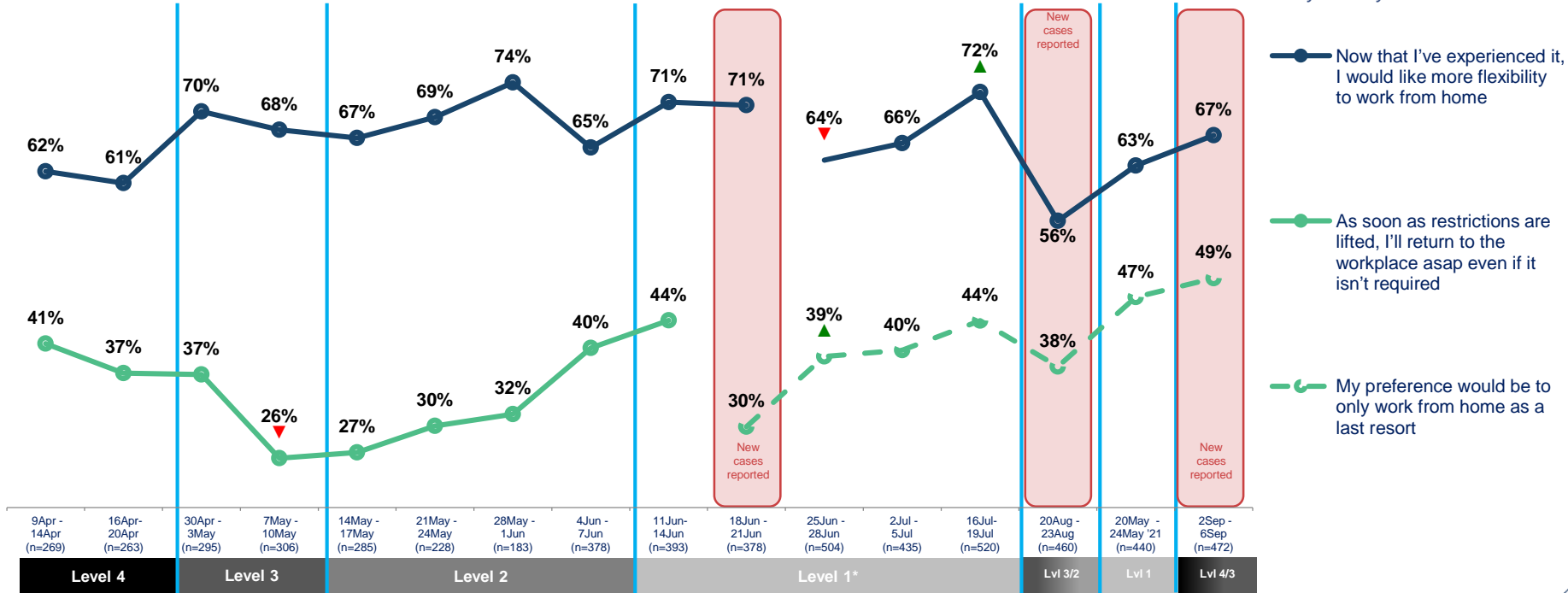
Base: all adults 15+ in New Zealand who were working from home at time of interviewing (9 Apr – 21Jun); all currently working from home, who had worked from home, or who were able to wfh (from 25 Jun)

*Note change in sample qualifying into survey question over time

In the past 12 months, there has been a directional increase in both the proportion desiring flexibility and the proportion who want to minimise working from home

Future attitudes to working from home*

*NB: qualification for question changed in June of 2020, broken tracking lines indicate break in continuity of analysis



QWORK6a. Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?

Base: All adults 15+ in New Zealand who were working from home at time of interviewing (9 Apr – 21 Jun); all currently working from home, who had worked from home, or who were able to wfh (from 25 Jun)

*Note change in sample qualifying into survey question over time

