Waka Kotahi COVID-19 transport impact

Fieldwork wave 6: topic deep dive analysis on active modes

18 May 2020

WAKA KOTAHI
NZ TRANSPORT AGENCY

New Zealand Government

Disclaimer

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

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

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

Report content

COVID-19 transport impact

- Section 1 – About this research
- Section 2 – Active modes analysis

Section 1 – About this research

Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

Overview of research (i)

Research design and outputs

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

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

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

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

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

There will be **three types of outputs** available on a weekly basis:

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

Example: Harmony Dashboard Page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys 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, enjoyment of 'quiet streets', intention to return children to school, etc.

Report notes (i)

Key information to note for this report

- This report is based on the six waves of fieldwork:
  - wave 1 data collected Friday 3 April to Wednesday 8 April;
  - wave 2 data collected Thursday 9 April to Tuesday 14 April;
  - wave 3 data collected Thursday 16 April to Monday 20 April;
  - wave 4 data collected Thursday 23 April to Sunday 26 April;
  - wave 5 data collected Thursday 30 April to Sunday 3 May;
  - wave 6 data collected Thursday 7 May to Sunday 10 May.
- Total sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves (all conducted under level 4 alert), combined sum of waves 5 and 6 (under level 3 alert), as well as individual waves where appropriate.
- Waves 1–4 of fieldwork were completed under a level 4 alert in New Zealand, while waves 5 and 6 were under a level 3 alert.
- The focus of this report is tracking the trends and changes over time and how New Zealanders have adjusted their use of transport and travel behaviour. As this study was not conducted prior to level 4 restrictions, respondents were asked to recall their transport and travel behaviour prior to level 4 restrictions based on a *'normal week'* i.e. in February this year.
- At a total population level, significance testing indicated in this wave 6 report is based on a statistically significant shift of results between waves 1 to 6, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results.
- 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 all four waves.

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.

Essential worker: All respondents indicating that they are classified as an Essential Worker at the current alert level.

Travelling essential worker: All respondents indicating that they are classified as an essential worker at the current alert level and that they are required to leave their home for their job**.**

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Wave 6	
		Sample	MoE*	Sample	MoE*	Sample	MoE*
Total		n=5,060	1.38	n=2,532	1.95	n=1,265	2.76
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=100	9.8
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=195	7.02
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	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=339	5.32
Any** Disability	See previous page	n=550	4.18	n=297	5.69	n=140	8.28
COVID-19** Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=300	5.66
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=147	8.08
Travelling essential worker**	See previous page	n=542	4.21	n=278	5.88	n=135	8.43
Essential worker**	See previous page	n=1,125	2.92	n=582	4.06	n=285	5.8

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

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

Deep dive analysis

Emergent stories and trends

- It is expected that with the constantly evolving nature of the COVID-19 pandemic, the changing alert levels governing public behaviour and emergent narratives impacting civil society discourse, the environment in which this research takes place will also be ever evolving.
- Deep dive analysis delivered as part of this research will enable questions to be answered outside of the core remit, and to periodically check in on societal variables and trends that may not be of interest every single week, but will speak to contextual changes and important landmarks in New Zealand's response to the COVID-19 overtime.
- Content included in the deep dive is generated from steering group requests.
- The emerging narratives in this deck are in places more complex than would warrant inclusion in the core report, included also are other narratives that may take on greater prominence later on when more responses are accumulated or when alert levels are changed.

Summary

Wave 6 deep dive

The sixth wave of fieldwork took place between Thursday 7 and Sunday 10 May, the last weekend under level 3 alert conditions, with all preceding days that respondents were answering for under level 3 conditions.

Early indications are present that active modes for exercise are beginning to decline under level 3 alert conditions.
In general, cyclists are more likely to cite a lack of cars on the roads making them feel more comfortable as a motivation, while walkers or runners are more likely to cite the need for a 'break from the screen'. Fitness/remaining active is a common motivator of all active mode exercisers.

Active modes exercisers who have been enjoying 'quiet streets' more cite the reduction in motor vehicle traffic as a reason for this, which also makes it safer in general for pedestrians and cyclists. Among the minority of people who are finding 'quiet streets' less enjoyable, they cite crowded footpaths and the resultant difficulty in maintaining distance as the cause for their decline in enjoyment.

There are some regional differences in terms of active modes preferred for exercise:

- Walking or running for fitness is more prevalent in Dunedin, while cycling is more prevalent in Tauranga, Christchurch and other non-metro areas of New Zealand
- Level 3 saw an increase in Wellingtonians walking for fitness, while cycling saw a decline in prevalence in Auckland during level 3.

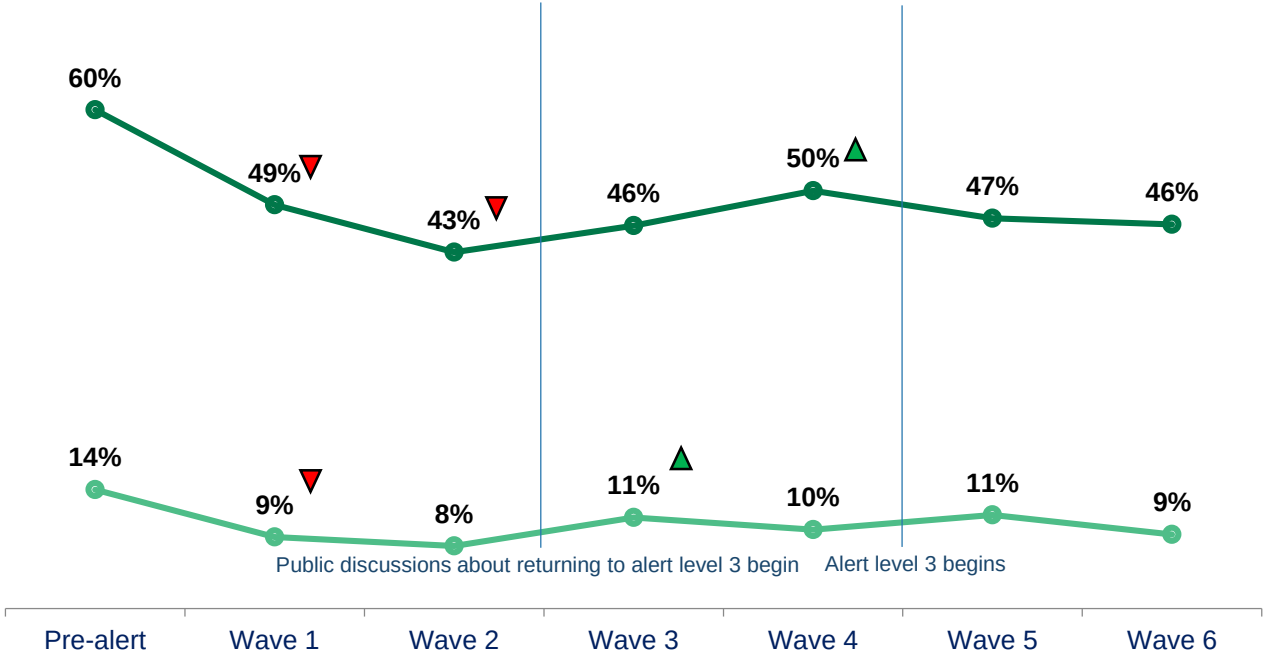
Walking as a form of transport for essential journeys has held onto most of the gains that developed in the last two weeks of alert level 4 during the first two weeks of level 3; whereas cycling as a mode peaked in the first week of alert level 3 before slipping back.

Regionally, cycling as a mode of use for essential journeys has been significantly more prevalent outside of the metro areas of New Zealand, with the exception of Tauranga.

Section 2 – Active modes analysis

Walking and cycling for leisure or fitness declined during alert level 3 after peaking in the last two weeks of alert level 4

Changes in leisure or fitness mode usage by wave

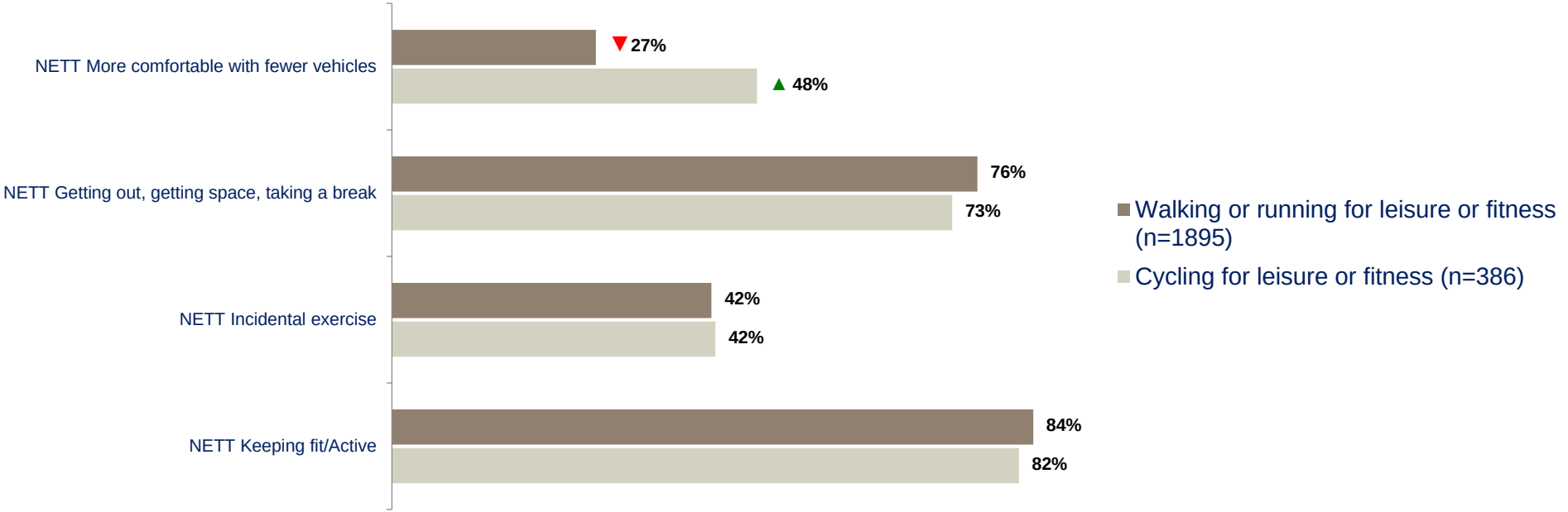


QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a ***normal*** week (e.g. in February this year)?/ And which, if any of the following types of journeys did you make *during the last seven days*?

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

Motivations for walking or cycling during alert level 4 are similar, although for cyclists having fewer vehicles on the road has been a greater impetus to get on their bike

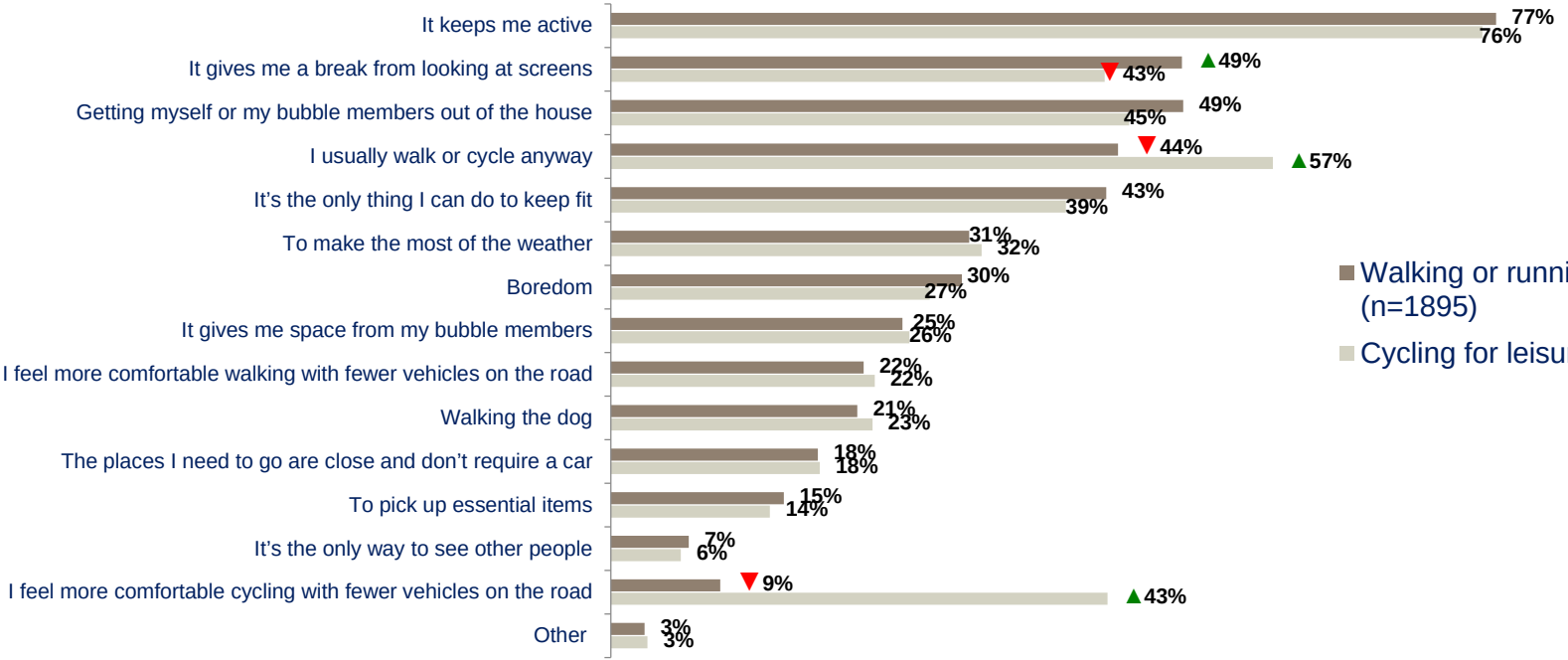
Reasons for walking, running or cycling by current journeys



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

In addition to variations in concerns about motorists, those walking and running are a little more likely to be motivated by a screen-break

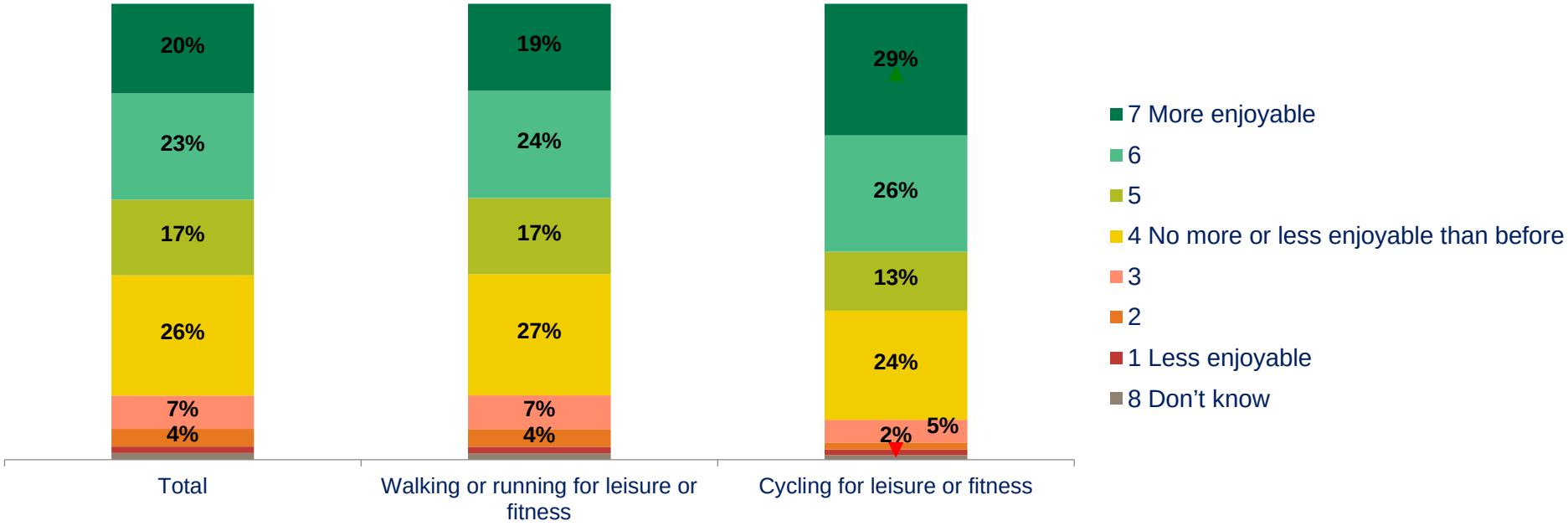
Reasons for walking, running or cycling by current journeys



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

Cyclists have been enjoying quiet streets slightly more than those walking during alert level 4

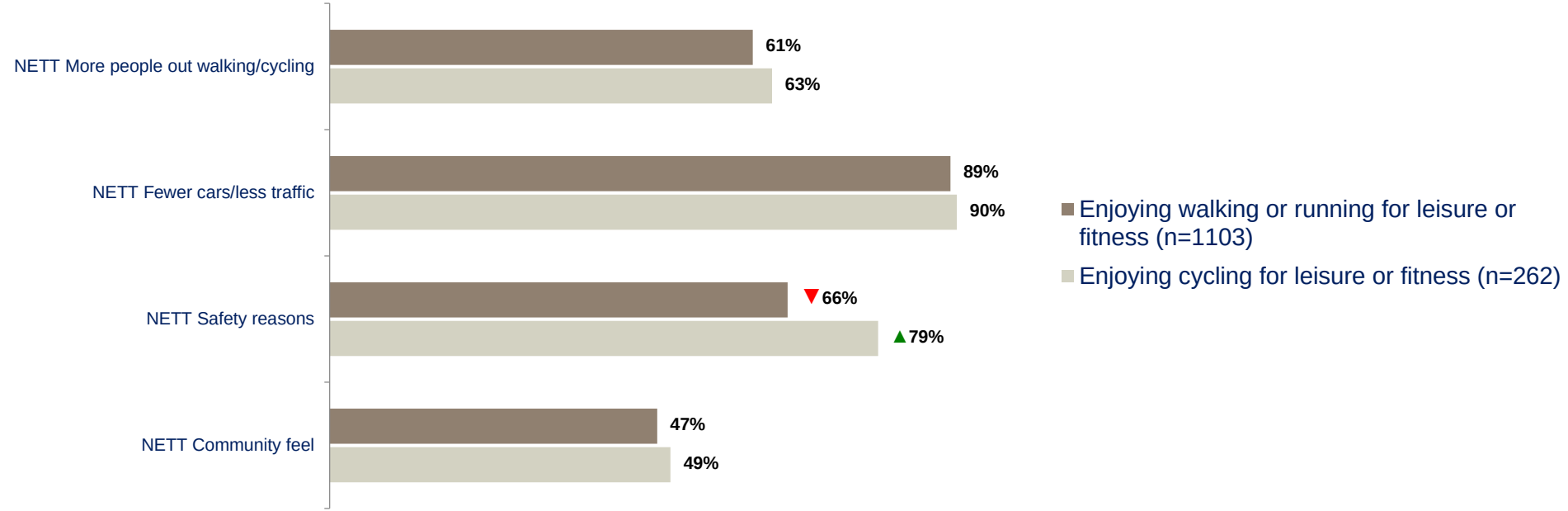
Enjoyment of streets and roads during lockdown



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

Among those finding it more enjoyable, reasons are similar or expected, although cyclists cite in higher numbers safety-related reasons for their enjoyment

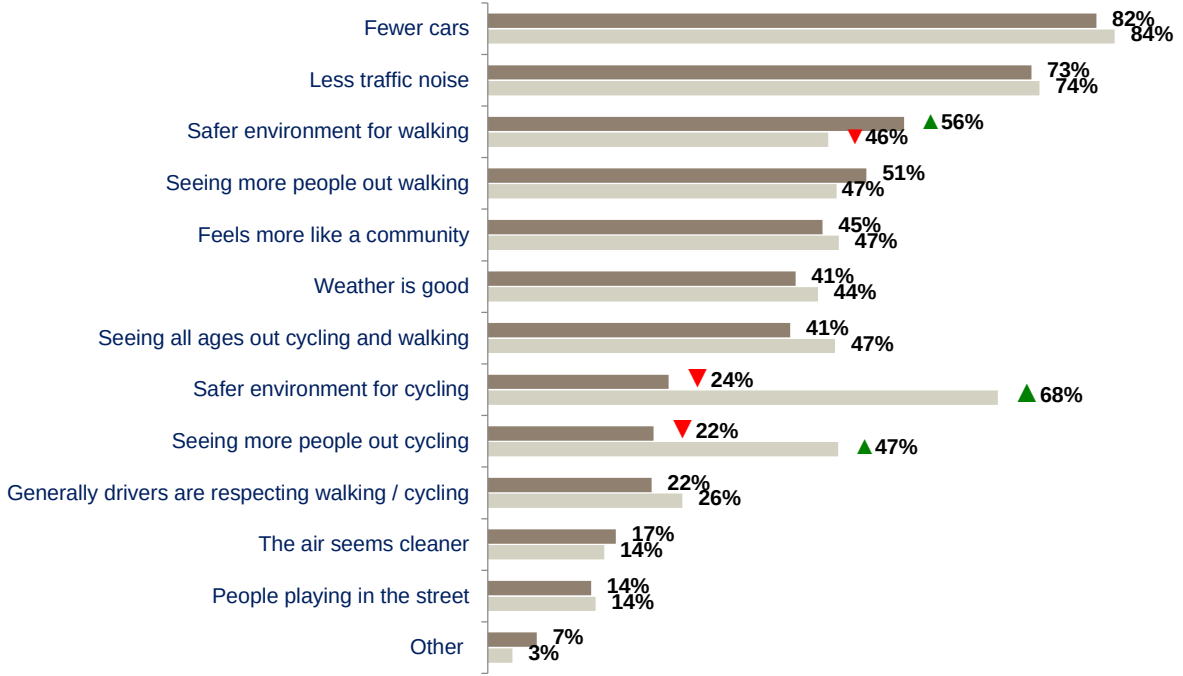
Reasons streets more enjoyable



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

For both groups out exercising, the absence of cars make for the top two reasons that streets are more enjoyable

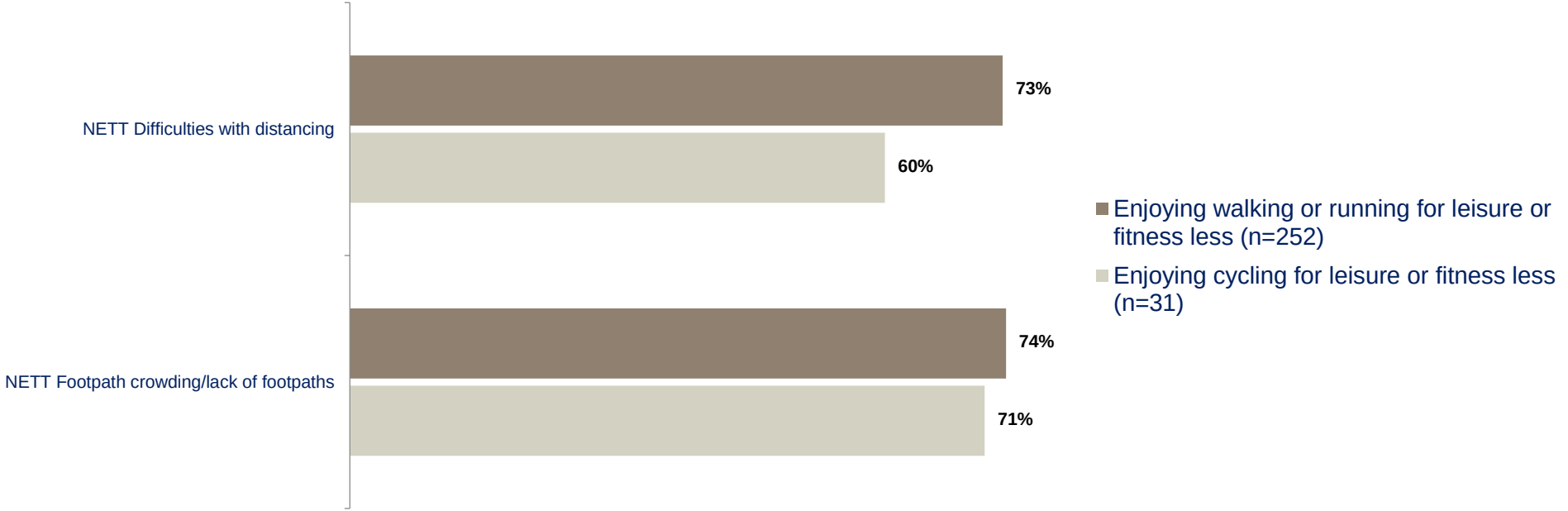
Reasons streets more enjoyable



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

Among those finding it less enjoyable, challenges with adequate distancing are cited more by those walking than cycling during this time

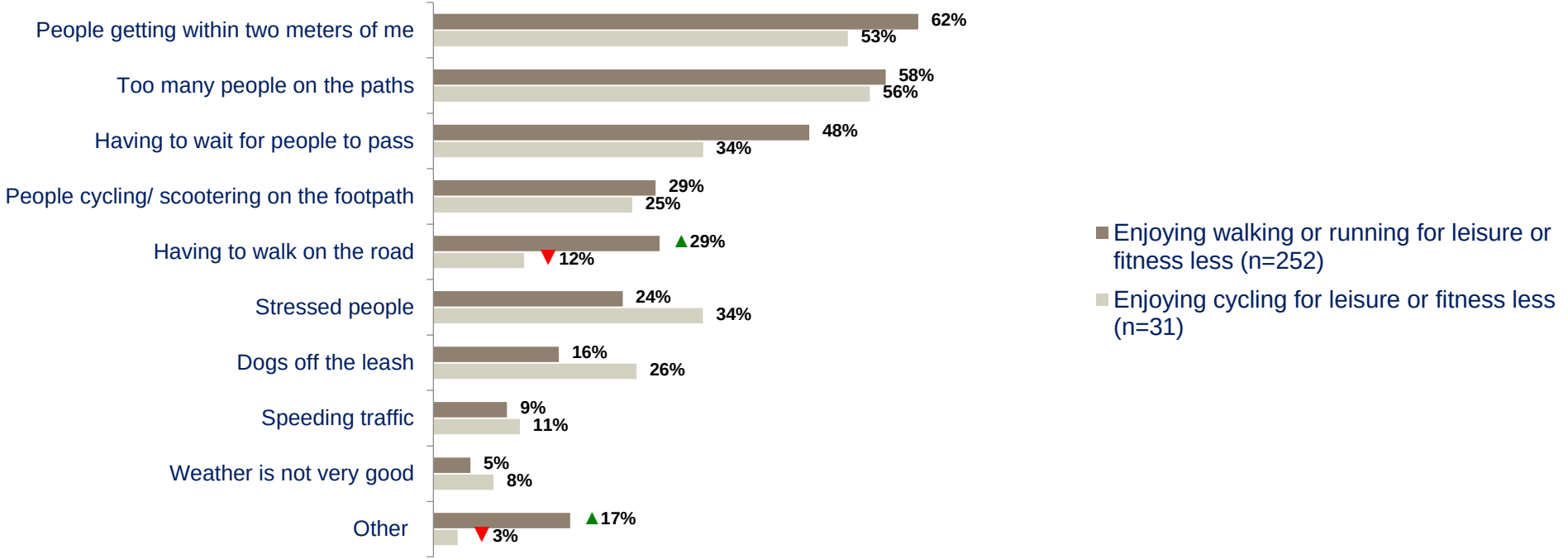
Reasons streets less enjoyable



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

Distancing and crowding disproportionately impact those walking and running who are perhaps less used to the vulnerability of having to be on the road

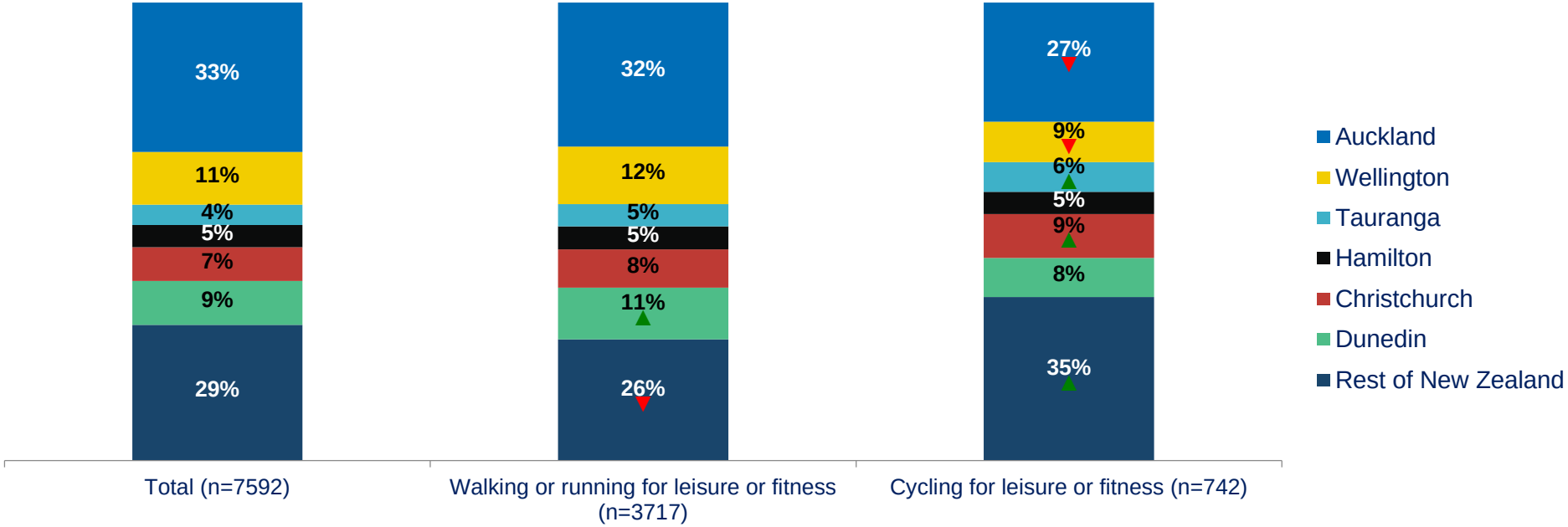
Reasons streets less enjoyable



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

Walking or running for fitness is more prevalent in Dunedin, while cycling is more prevalent in Tauranga, Christchurch and other non-metro areas of New Zealand

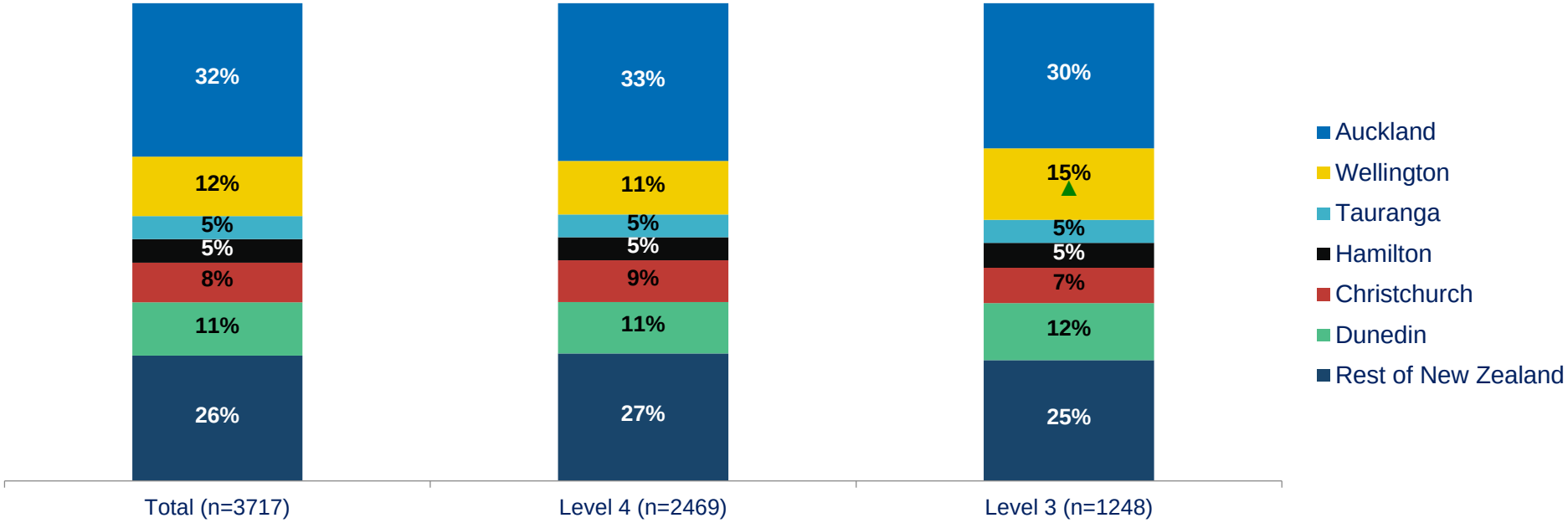
Leisure or fitness modes used in past week by region



QJOURNEY1-2. 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

Alert level 3 saw a significant increase in the proportion of Wellingtonians that comprised people walking compared to the previous alert level

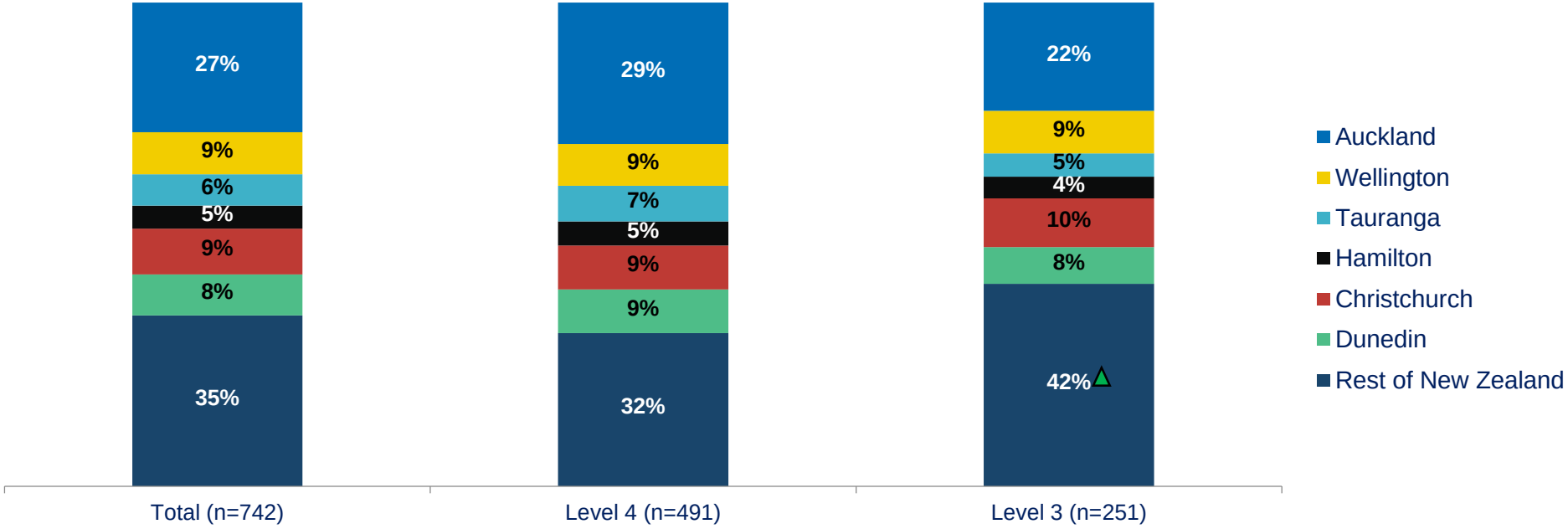
Walking / running for leisure in past week by region by alert level



QJOURNEY1-2. 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 alert level 3 there was a significant shift in the geographic make-up of people cycling for fitness, with notably fewer Aucklanders cycling

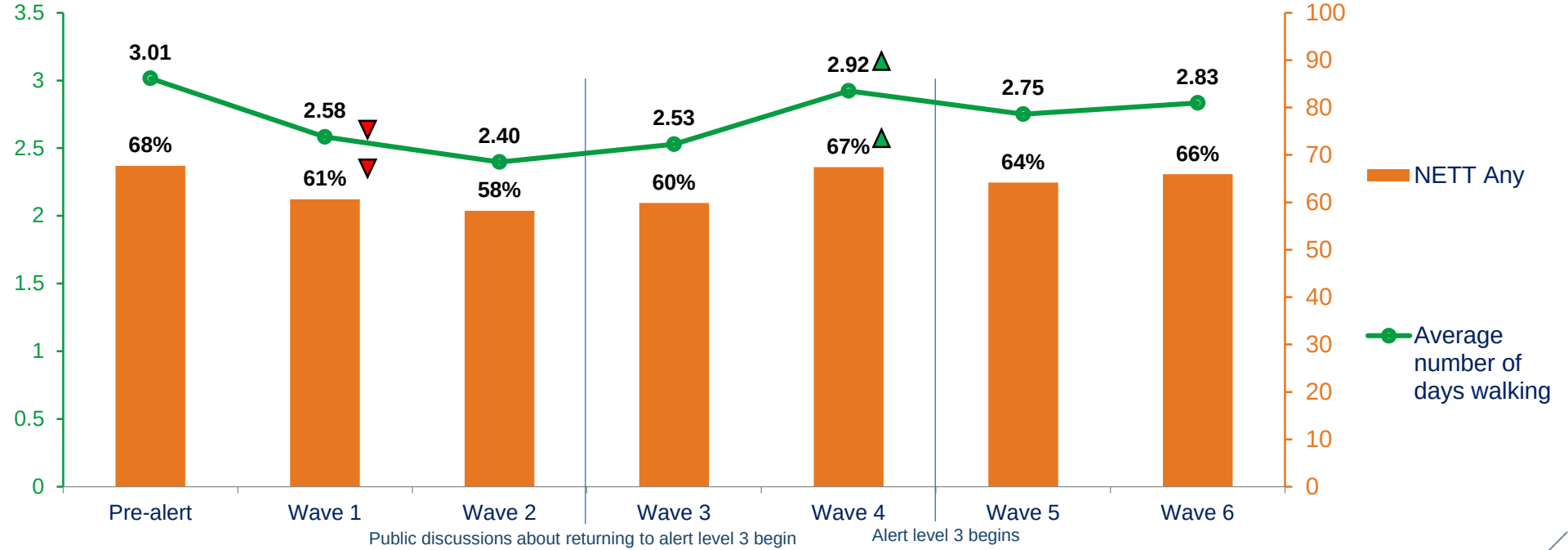
Cycling for leisure or fitness in past week by region



QJOURNEY1-2. 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

Walking as a general mode of transport has held on to most of the gains that developed in the last two weeks of alert level 4

Changes in mode frequency by wave – walk of more than 10 minutes

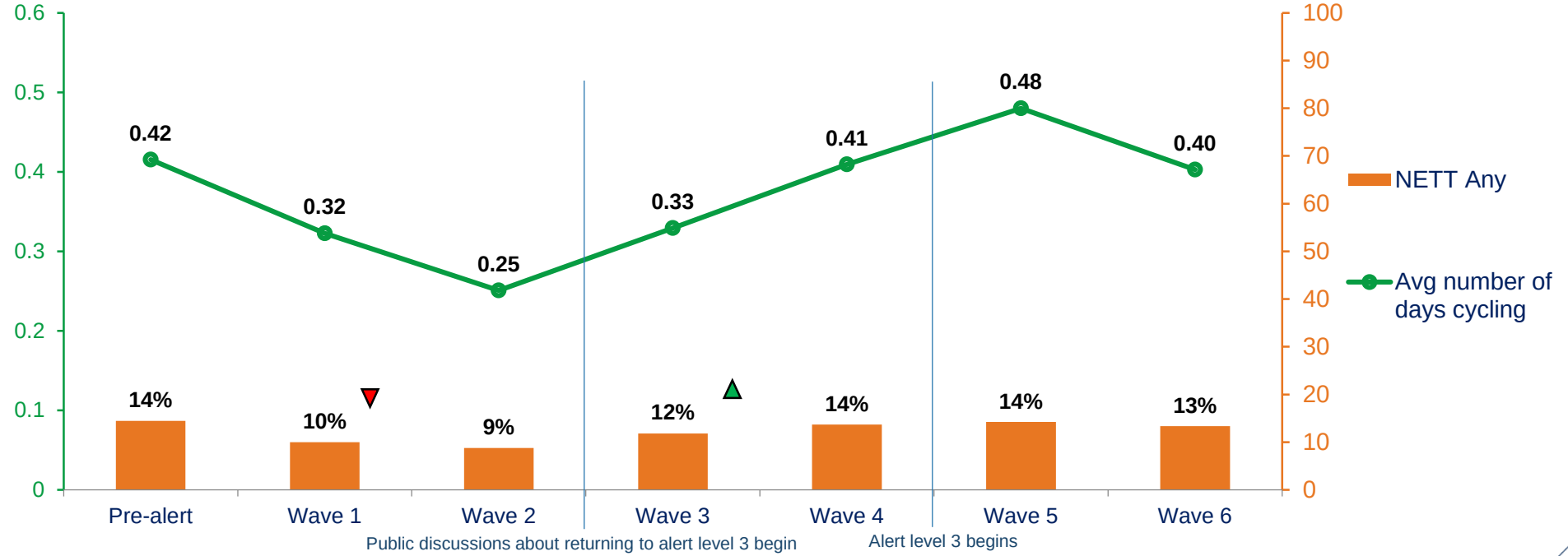


QFREQ2 –And during the past seven days, **on how many days** have you travelled via each of the modes listed below?

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

Cycling as a mode peaked in the first week of alert level 3 before slipping back to levels seen prior to lifting of alert level 4

Changes in mode frequency by wave – bicycle including E-bike



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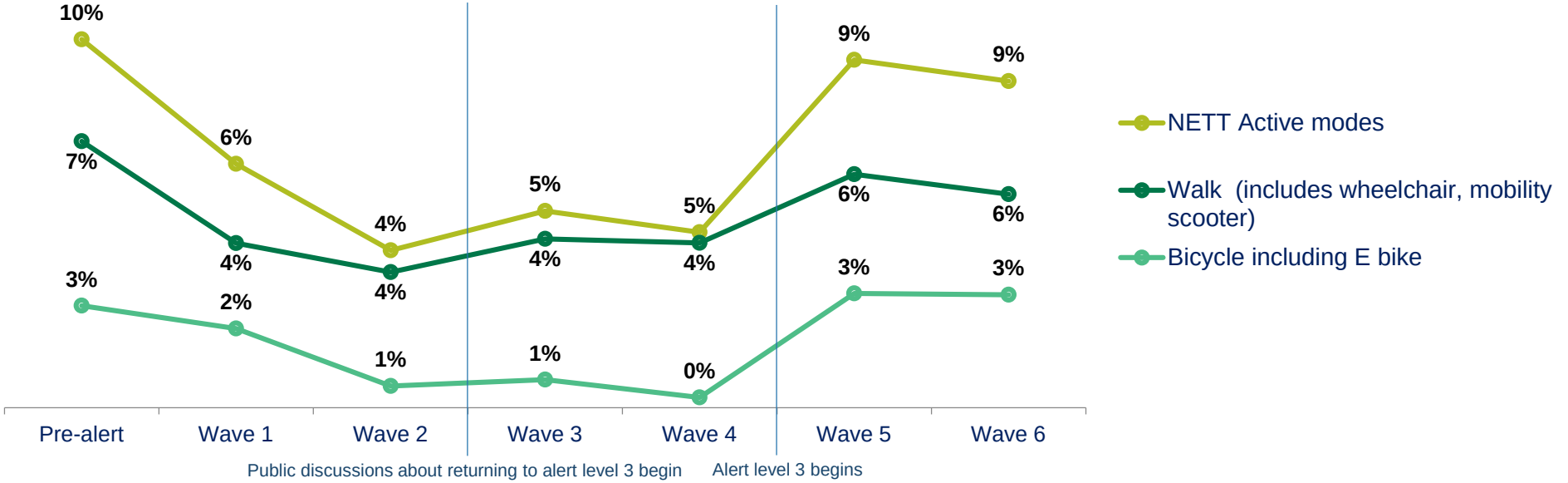
Once alert level 3 commenced, active modes for getting to work almost returned to levels that were self-reported by people as their typically mode in February

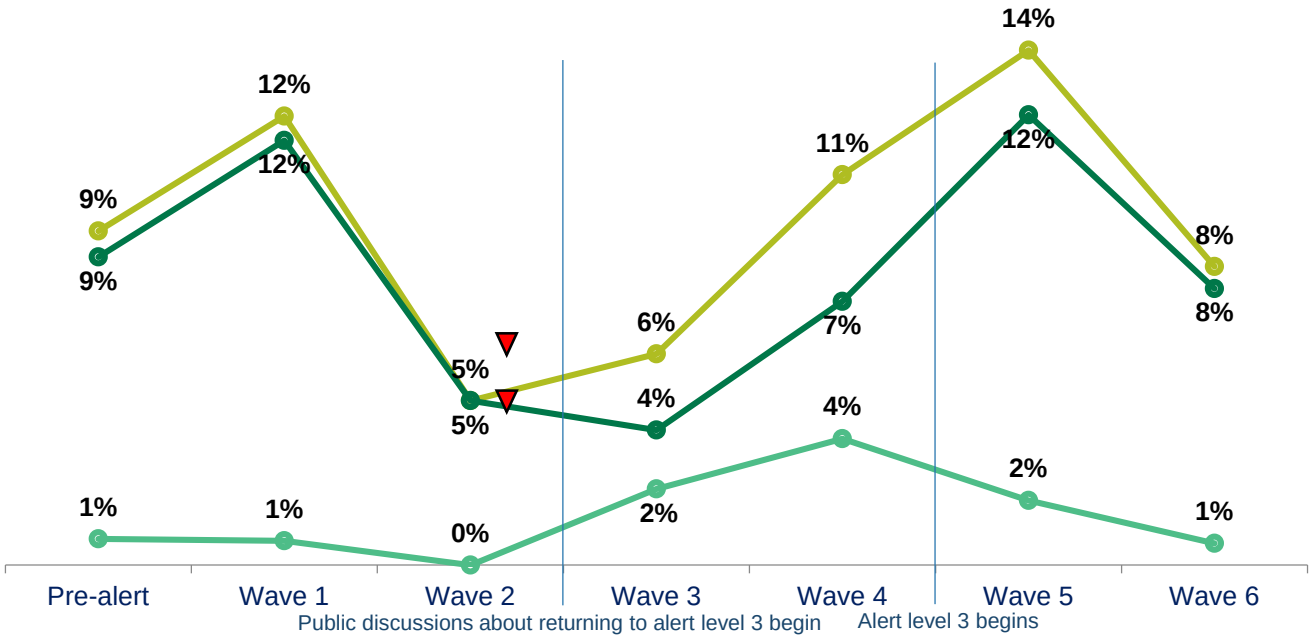
Travelling to work in the past seven days – active modes



QMODE2. Thinking again about the journeys you have taken outside of the home during the past 7 days. How did you make each of the journeys listed below?
Base: New Zealanders who have travelled to work in the past 7 days; Benchmark wave (n=3,751), Wave 1 (n=170), Wave 2 (n=175), Wave 3 (n=185), Wave 4 (n=165), Wave 5 (n=135), Wave 6 (n=290)

Immediately after alert level 3 began, walking to medical appointments peaked but have declined since then

Travelling to medical appointments in the past seven days – active modes

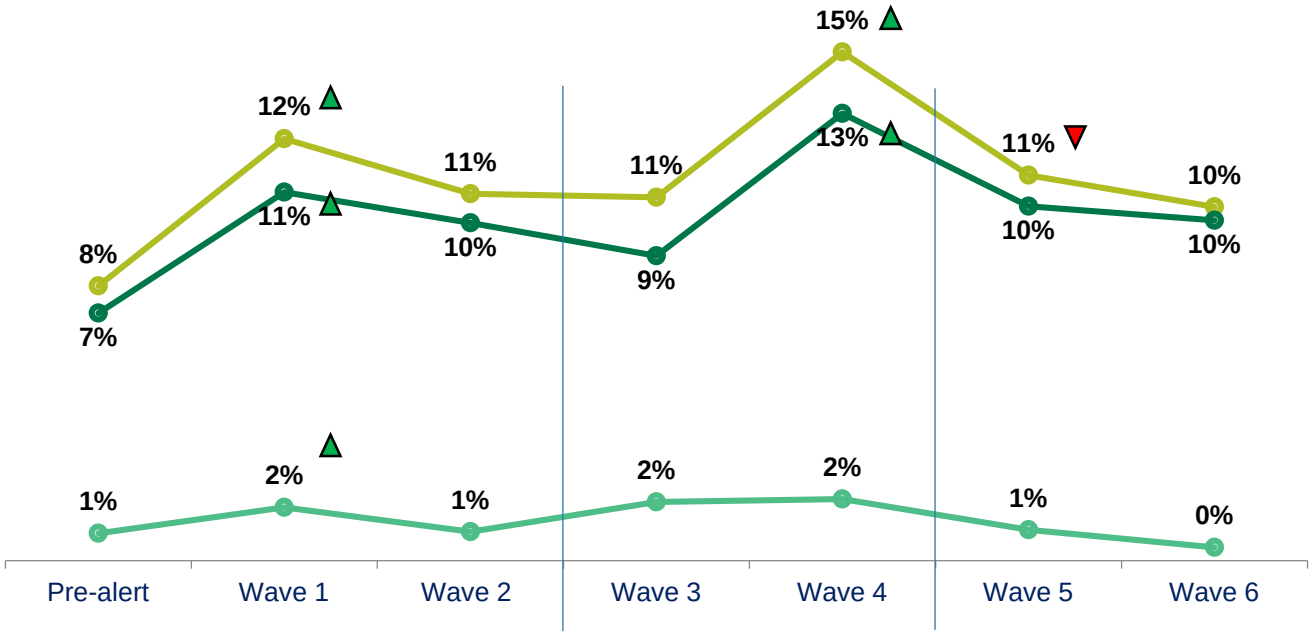


QMODE2. Thinking again about the journeys you have taken outside of the home during the past seven days. How did you make each of the journeys listed below?

Base: New Zealanders who have travelled to a medical appointment in the past seven days; Benchmark wave (n=2,869), Wave 1 (n=159), Wave 2 (n=172), Wave 3 (n=156), Wave 4 (n=159), Wave 5 (n=181), Wave 6 (n=188)

Active modes for getting groceries has also declined significantly in alert level 3 after experiencing a spike the week prior to be applied

Travelling to shop for groceries in the past seven days – active modes

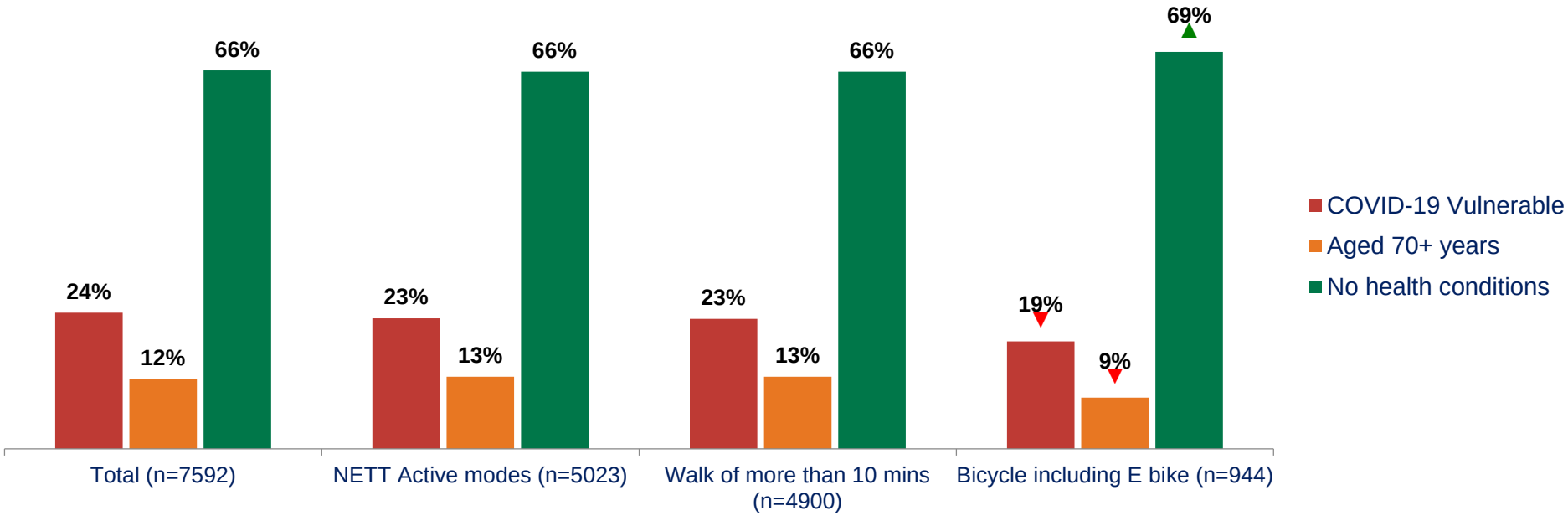


QMODE2. Thinking again about the journeys you have taken outside of the home during the past seven days. How did you make each of the journeys listed below?

Base: New Zealanders who have travelled to shop for groceries in the past seven days; Benchmark wave (n=5,768), Wave 1 (n=870), Wave 2 (n=862), Wave 3 (n=864), Wave 4 (n=906), Wave 5 (n=889), Wave 6 (n=902)

Those who are COVID-19 vulnerable are significantly less likely to have been cycling in the past seven days, but still represent a sizeable proportion using this mode

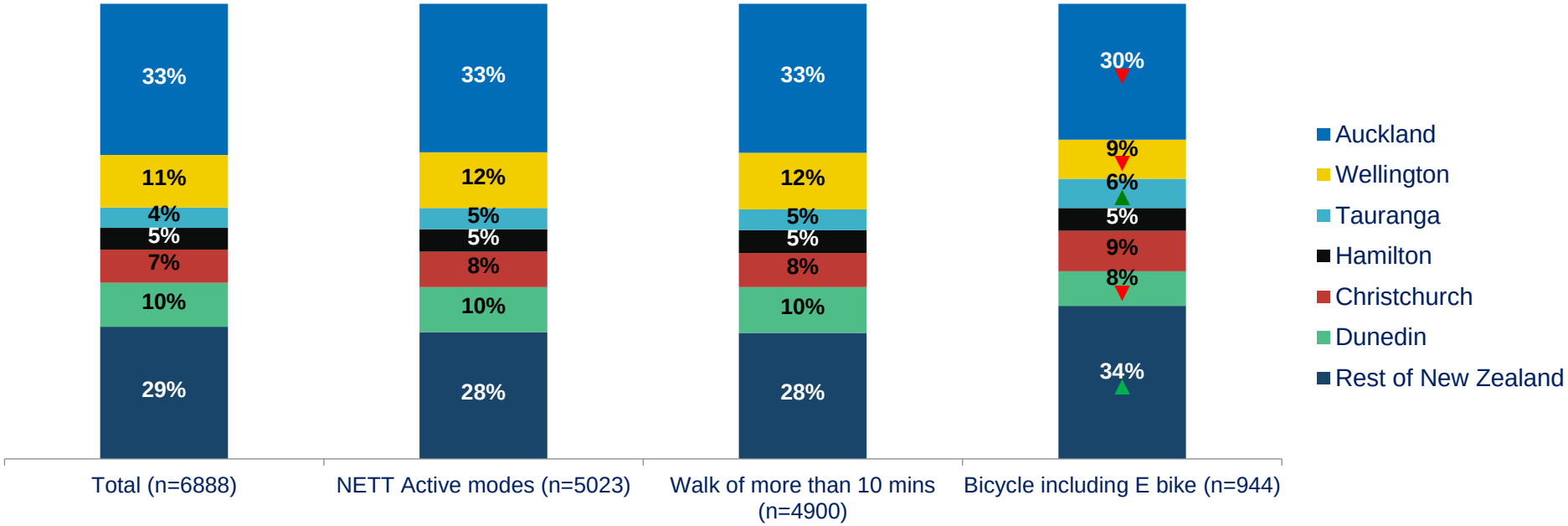
Modes used in past week by vulnerability



QJOURNEY1-2. 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

Cycling as a mode of use in the last seven days has been significantly more prevalent outside of the metro areas of New Zealand, with the exception of Tauranga

Modes used in past week by region



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Base: all adults 15+ in New Zealand



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