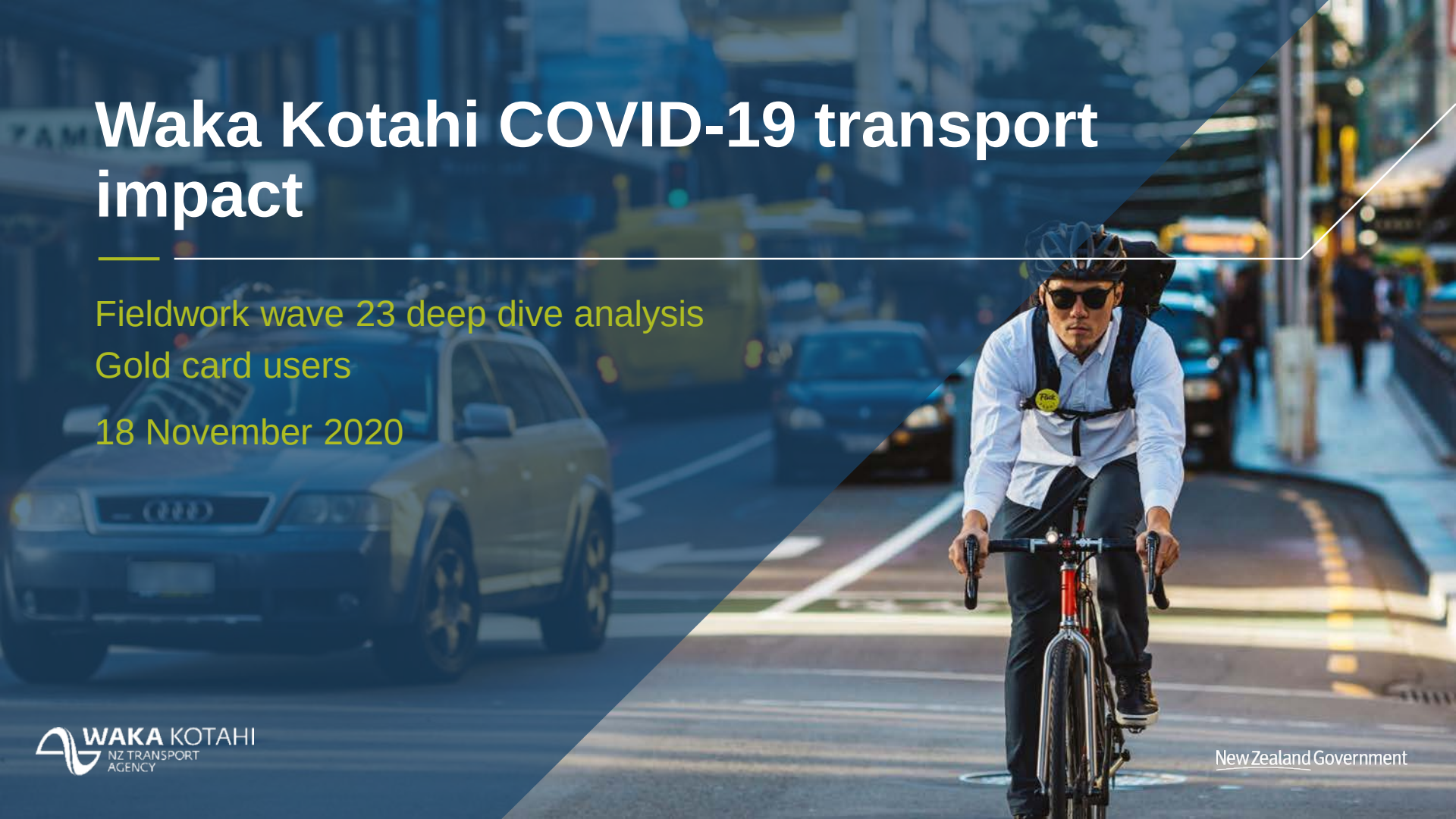
Waka Kotahi COVID-19 transport impact

Fieldwork wave 23 deep dive analysis

Gold card users

18 November 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
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- Section 5 – Are over 65s travelling less compared to other age groups?

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	
7	Thursday 14 May to Sunday 17 May	Alert level 2
8	Thursday 21 May to Sunday 24 May	
9	Thursday 28 May to Monday 1 June	
10	Thursday 4 June to Sunday 7 June	
11	Thursday 11 June to Sunday 14 June	Alert level 1
12	Thursday 18 June to Sunday 21 June	
13	Thursday 25 June to Sunday 28 June	
14	Thursday 2 July to Sunday 5 July	
15	Thursday 16 July to Sunday 19 July	
16	Thursday 30 July to Sunday 2 August	
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	
19	Thursday 3 September to Sunday 6 September	Alert Level 2.5 (AKL) Alert level 2 (Rest of NZ)
20	Thursday 17 September to Sunday 20 September	
21	Thursday 24th September to Sunday 27 September	Alert level 2 (AKL) Alert level 1 (Rest of NZ)
22	Thursday 15th October to Sunday 18th October	Alert level 1
23	Thursday 12th November to Sunday 15th 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.

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 23 deep dive 65+ age group

The twenty-third wave of fieldwork took place between Thursday 12 and Sunday 15 November.

This deep dive is designed to investigate recent patterns of public transport usage among Gold Card holders. As Gold Card ownership is not collected in the survey, the 65+ age group is used as a proxy for this. However, it should be noted that the overall sample is designed to be nationally representative of New Zealand adults 15+ and that this analysis focuses on a sub-sample of that population. The sample was not structured to be nationally representative of each sub-set and so wave-on-wave variation of this sub-sample composition may contribute to changes over time beyond those that would be observed within the actual 65+ population.

Context
It is important to note factors that might influence public transport access among these groups beyond the unifying factor of their age. Gold Card qualifying people are less likely than those 15-64 to live in built up urban areas in the larger cities, where access to a wide range of public transport options may be available. This does not mean that they live primarily in rural areas, as the majority of over 65s interviewed to date have lived in suburbs of less populous cities (such as Dunedin, Christchurch or Tauranga) or towns.

This impacts the forms of public transport available to them, and it is therefore no surprise to observe that in the pre-lockdown behaviour measured in the benchmark waves, there were fewer public transport users in this group, and the public transport repertoire of this age category skewed much more towards buses than any other category.

Has the return to public transport usage been lower among over 65s than for other groups?
Public transport usage dropped sharply for all age groups following the start of the second split-alert-level lockdown, but what was notable in the overall picture was the relatively quick recovery in weekly usage. This has not really been true for over 65s who, following the return to level 1 nationally, are not reporting public transport usage comparable to June and July (the last alert-level 1 period).

The chief driver in this has been a stalled recovery in bus usage, which makes up a higher proportion of public transport usage among the gold-card qualifiers surveyed. Future consideration of public transport modes has also not recovered in the way it has for those 15-64.

It's notable for this group that as the recovery in public transport usage has stalled, the most recent waves show statistically significant growth in weekly private vehicle usage, which may be indicative of some mode-shift for Gold Card holders.

Is there a difference between age groups in sense of personal risk relating to PT that contributes to differing travel behaviour?
Concern about COVID-19 infection has peaked higher for those 65+, with some variability. In the middle of the second lockdown, the reported level of concern adhered more closely to the national average, but has risen again at the return to level 1, while falling for younger New Zealanders. This may lead to disproportionate caution on the part of Gold Card holders compared to others.

The perception of public transport as hygienic hasn't really recovered for those 65+ following the second lockdown, but this is not unique to this age group, nor is the continued low association with social distancing.

It is notable that during the second lockdown period and return to level 1, over 65s have been significantly more likely to cite concerns about low mask adherence than others as a reason for staying off public transport, and whilst this alone doesn't appear sufficient to account for the slow recovery in their PT usage, it is likely that this is one of the contributing factors and is certainly driven by a sense of risk on their part.

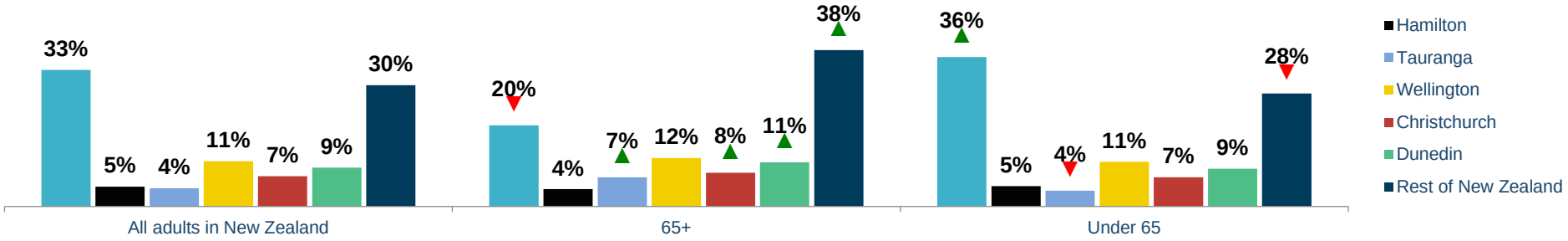
Are over 65s simply travelling less compared to other age groups?
While these adults exercised more caution with regard to self-isolation in the earliest weeks of lockdown, this difference has largely evaporated in the split level lockdown and return to level 1, with over 65s no more likely to persist with self-isolation.

In addition, over 65s were only slightly more likely to have made no essential journeys at all during the second lockdown weeks, and this difference has also disappeared as we return to level 1. This being the case, it seems unlikely that limited travel activity is the sole cause of lower PT usage among gold card holders, but if the trend of increased activity on their part continues, PT usage may grow for this group too.

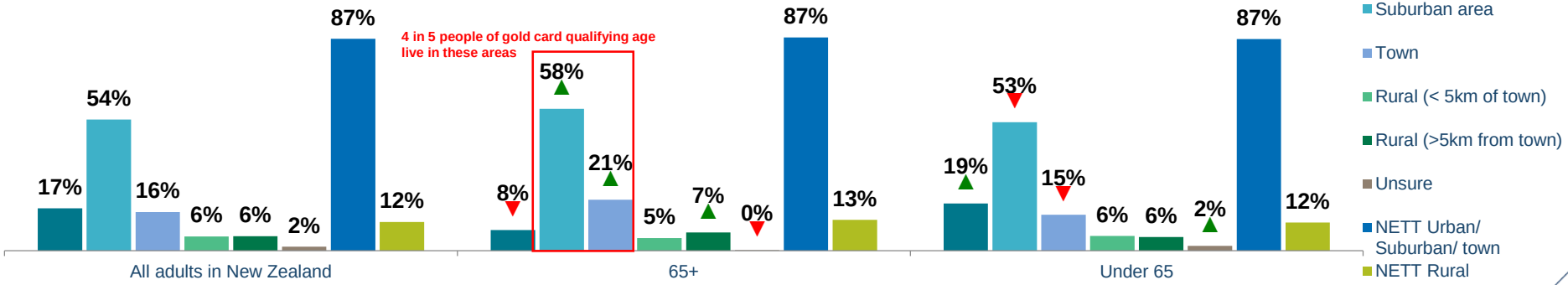
Section 2 – Context

Gold card qualifiers are more likely to live in lower density towns and cities but *not necessarily rural areas*, this is instructive in the type of suburban PT they can access

Distribution of age groups by region



Distribution of age groups by urbanity

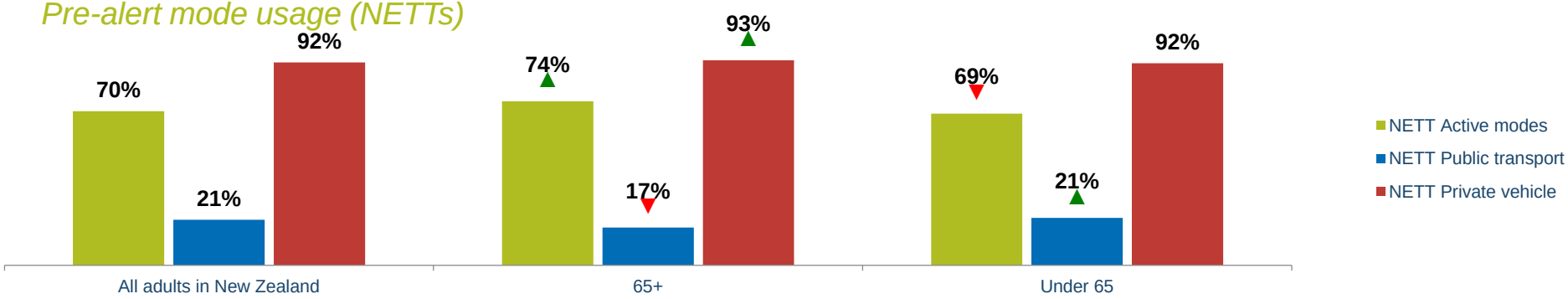


QREGION/QCITY/QAREA–Where do you live? You said that you live in [INSERT ANSWER FROM QREGION] Which, of the following applies to you? Is the area you live in…

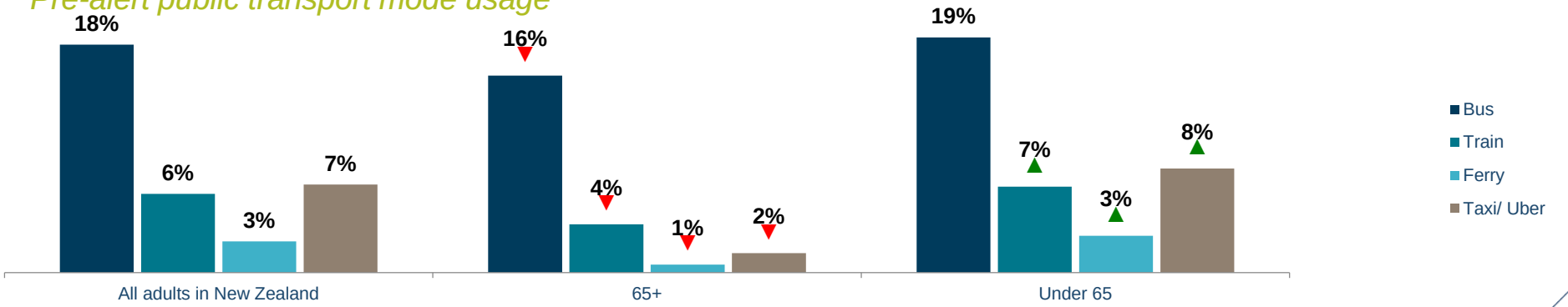
Base: all adults 15+ in New Zealand (n=28,997), All adults 65+ (n=5,525), All adults 15-64 (n=23,472)

Before lockdown, the default usage of all PT modes was lower among over 65s and they accessed bus services about four times as much as the next PT mode

Pre-alert mode usage (NETTs)



Pre-alert public transport mode usage

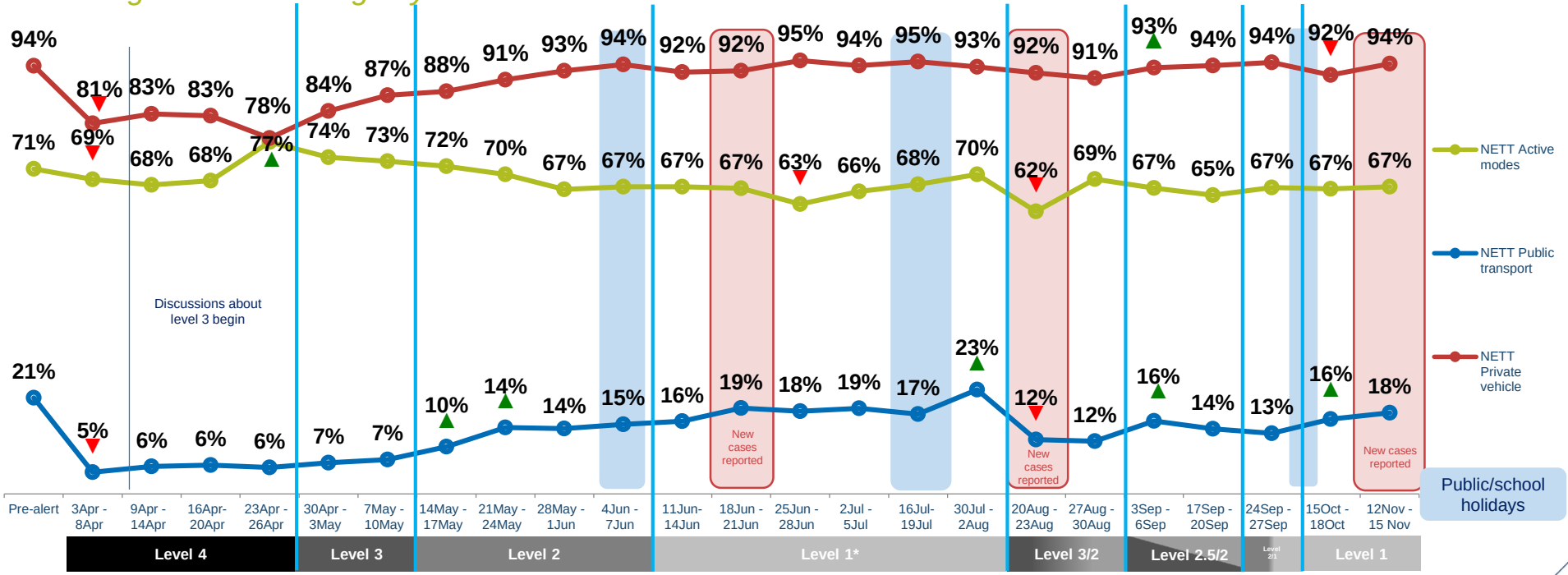


QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below?
Base: all adults 15+ in New Zealand in benchmark waves 1-3 (n=3,759), All adults 65+ in Benchmark (n=710), All adults 15-64 in Benchmark (n=3,049)

Section 3 – Has the return to public transport usage been lower among over 65s than for other groups?

Following the second, split-level lockdown, reported weekly PT usage has begun to grow again at a national level

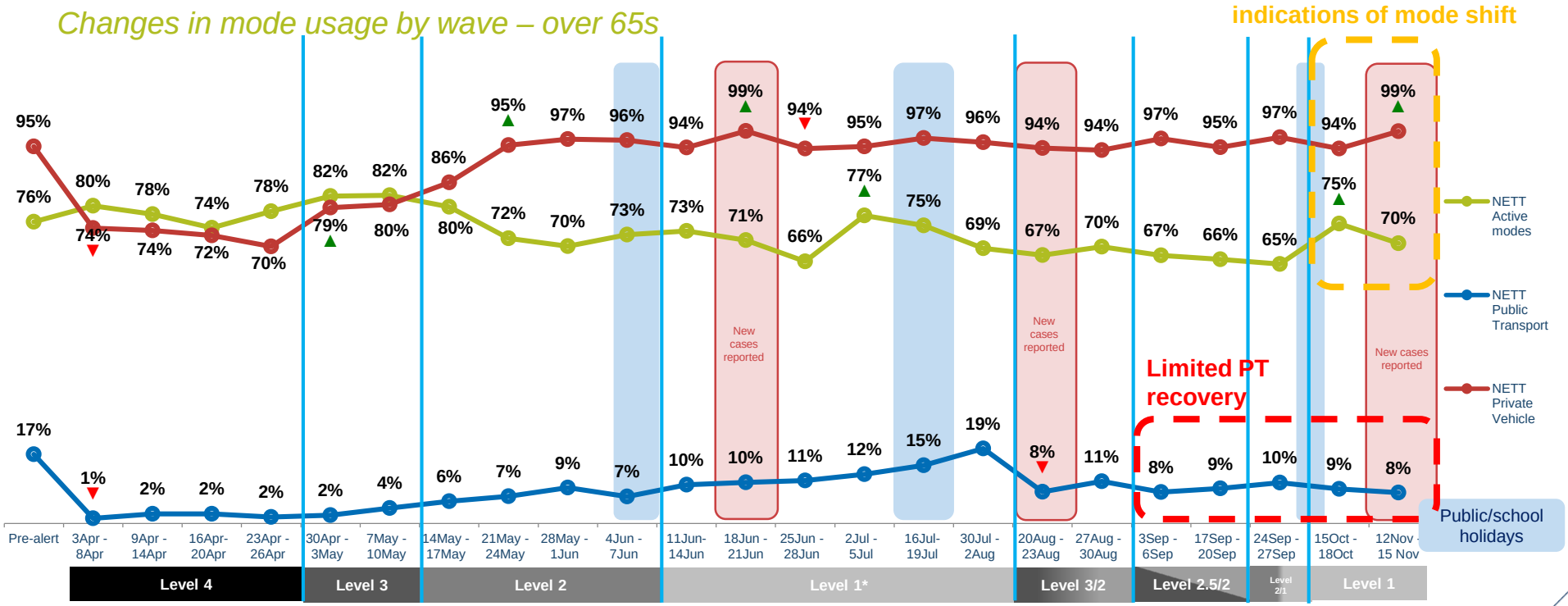
Changes in mode usage by wave – national



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*

Following the community transmission cases in August, PT usage among over 65s has *not* begun to recover as it has at the total level, with more private vehicle travel

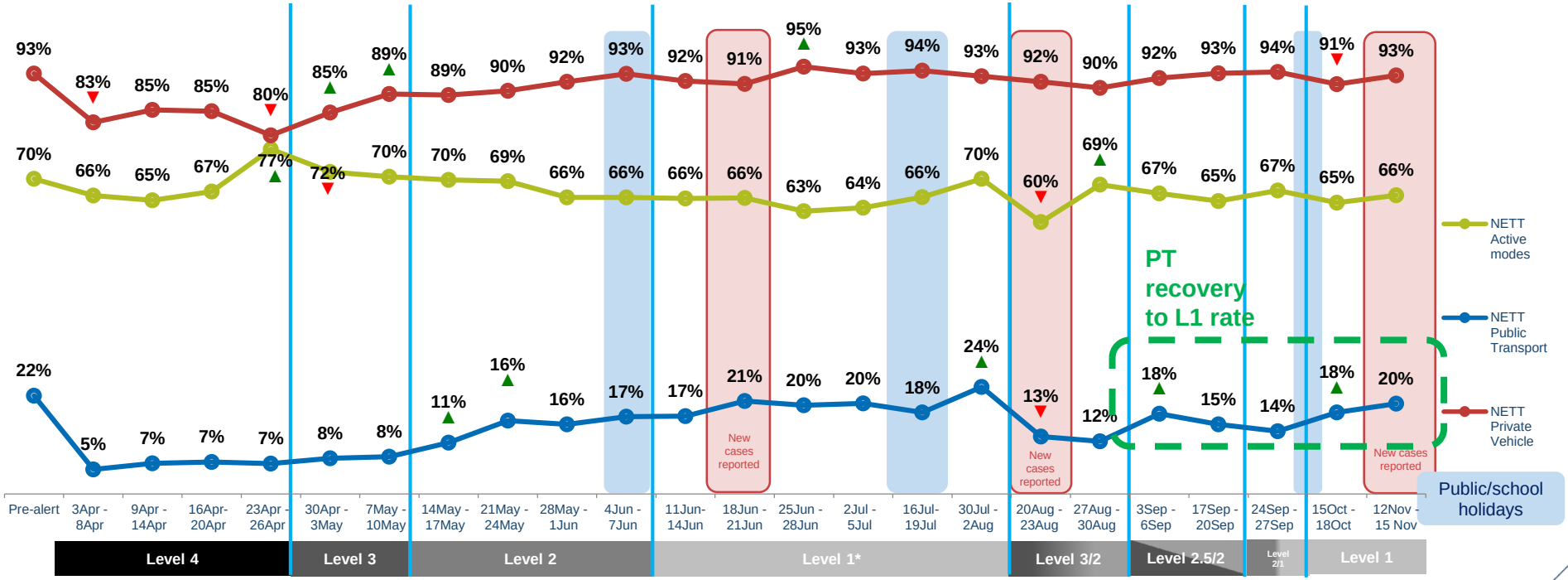
Changes in mode usage by wave – over 65s



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 65+ in New Zealand (n=c.230 per wave)*

In comparison, reported weekly public transport among those 15-64 quickly rebounded to a rate comparable to the initial level 1 period

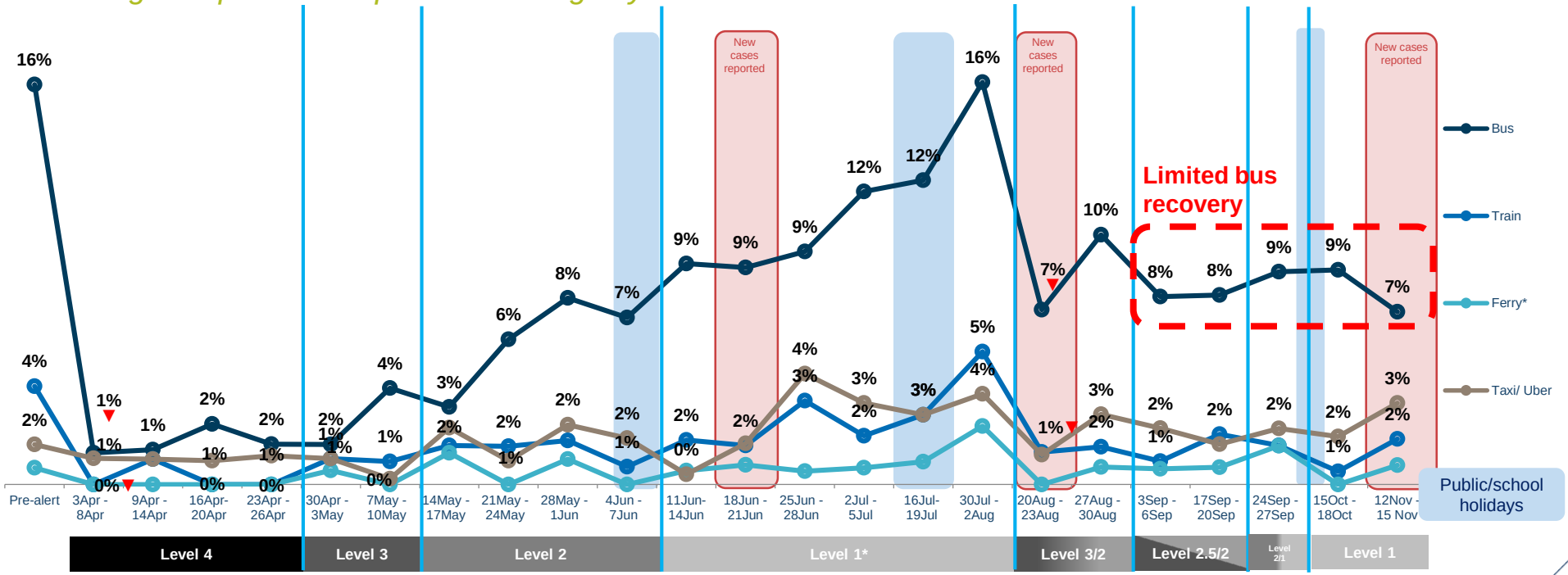
Changes in mode usage by wave – under 65s



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 - 64 in New Zealand (n=c.1,020 per wave)*

Reported usage of trains and ferries has been negligible among over 65s throughout lockdown and it is the lack of return to buses that arrests PT recovery

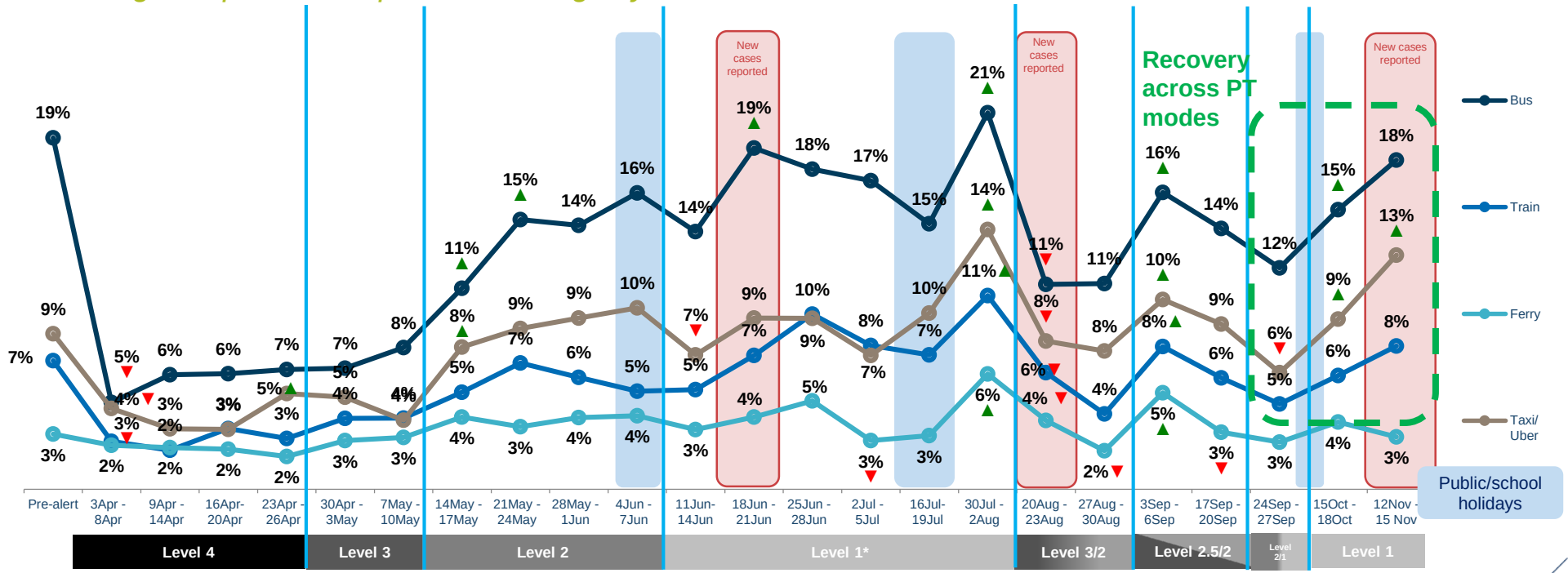
Changes in public transport mode usage by wave – over 65s



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 65+ in New Zealand (n=c.230 per wave) *data labels for ferry suppressed due to low incidences and no significant changes*

Comparatively, for those aged 15-64, the proportion of weekly bus, train and ferry travellers now matches pre-lockdown rates, with taxi usage exceeding it

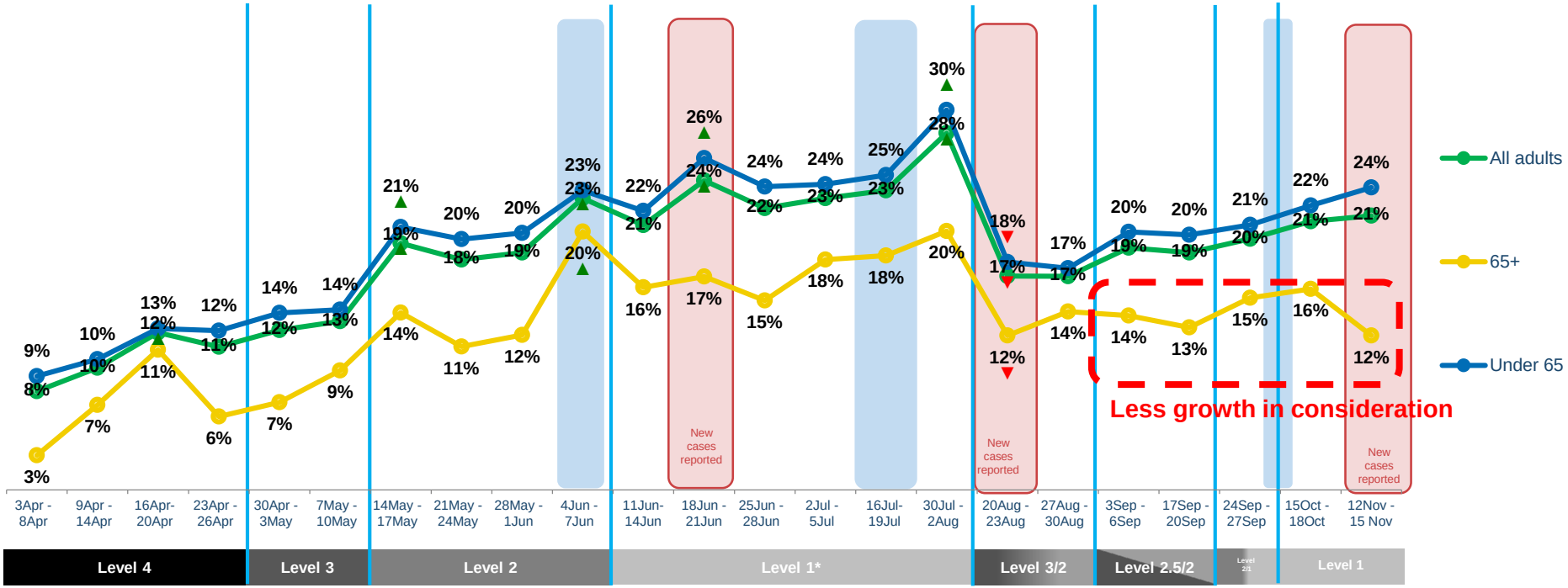
Changes in public transport mode usage by wave – under 65s



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 - 64 in New Zealand (n=c.1,020 per wave)*

PT consideration has always been lower among those aged 65+, but since the second lockdown, the recovery in consideration hasn't been sustained for over 65s

Public transport consideration by age group



QPT2. If available next week, which if any of the following would you be likely to use? – all selecting 'likely' for bus, train or ferry

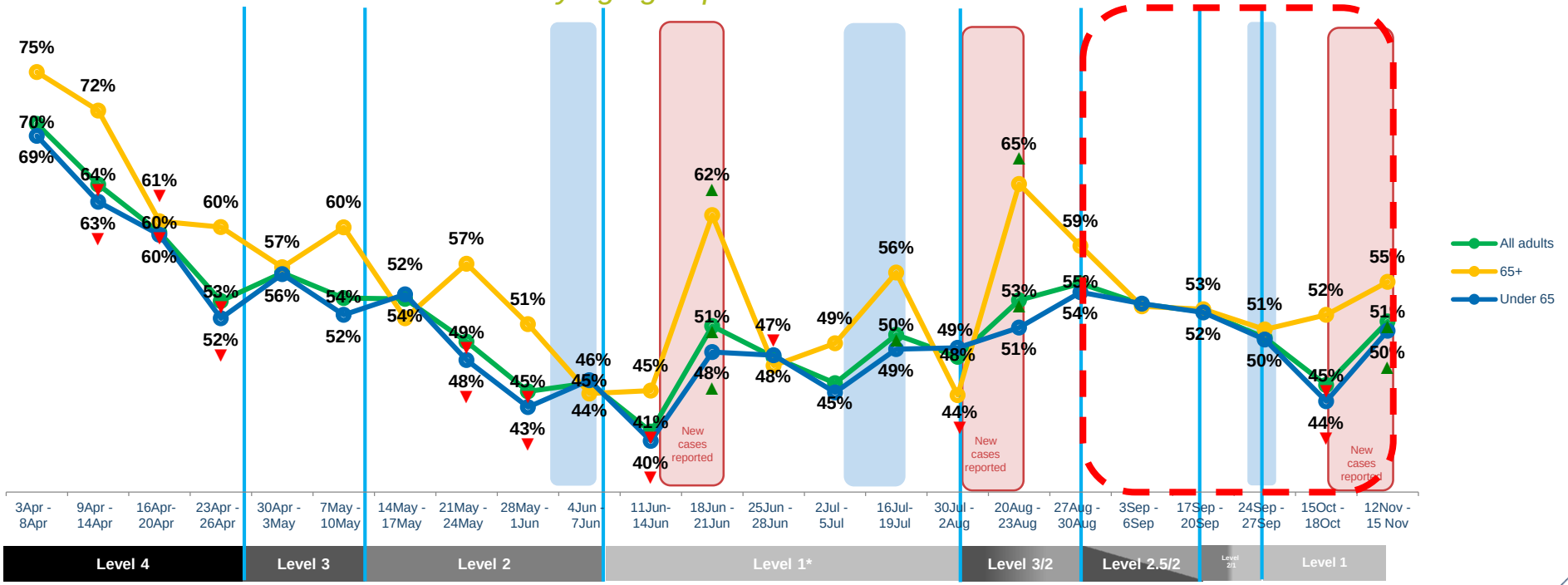
Base: all adults 15+ in New Zealand, all adults 65+ in New Zealand (n=c.230 per wave), all adults 15 - 64 in New Zealand (n=c.1,020 per wave)

Section 4 – Is there a difference between age groups in sense of personal risk relating to public transport that contributes to differing travel behaviour?

Concerns about infection have generally peaked higher for those 65+ than others, but the gap narrowed somewhat during the second lockdown before widening again

Personal infection concern over time by age group

Differing public transport recovery rates during this period



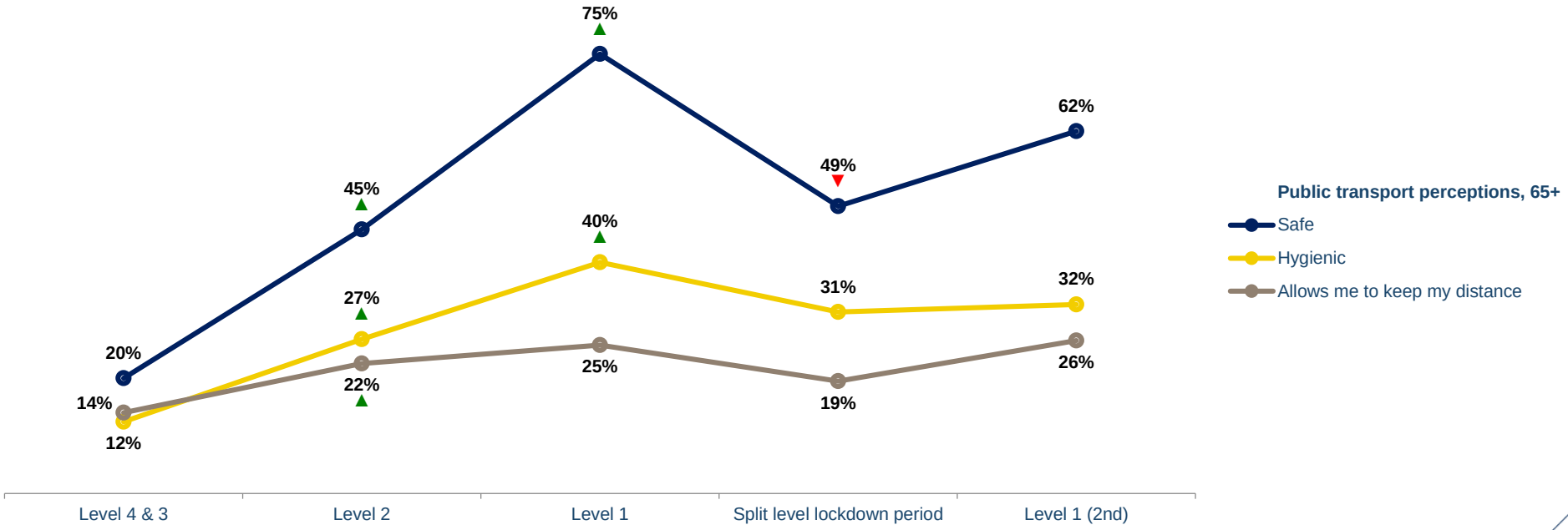
QPTUSE3. How personally concerned are you about each of the following? – The risk of COVID-19 infection to yourself

Base: all adults 15+ in New Zealand, all adults 65+ in New Zealand (n=c.230 per wave), all adults 15 - 64 in New Zealand (n=c.1,020 per wave)

Among those 65+, perceptions of hygiene haven't fully recovered since the second lockdown, and distancing has not significantly strengthened since level 2

Perceptions of public transport among 65+ – COVID related

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

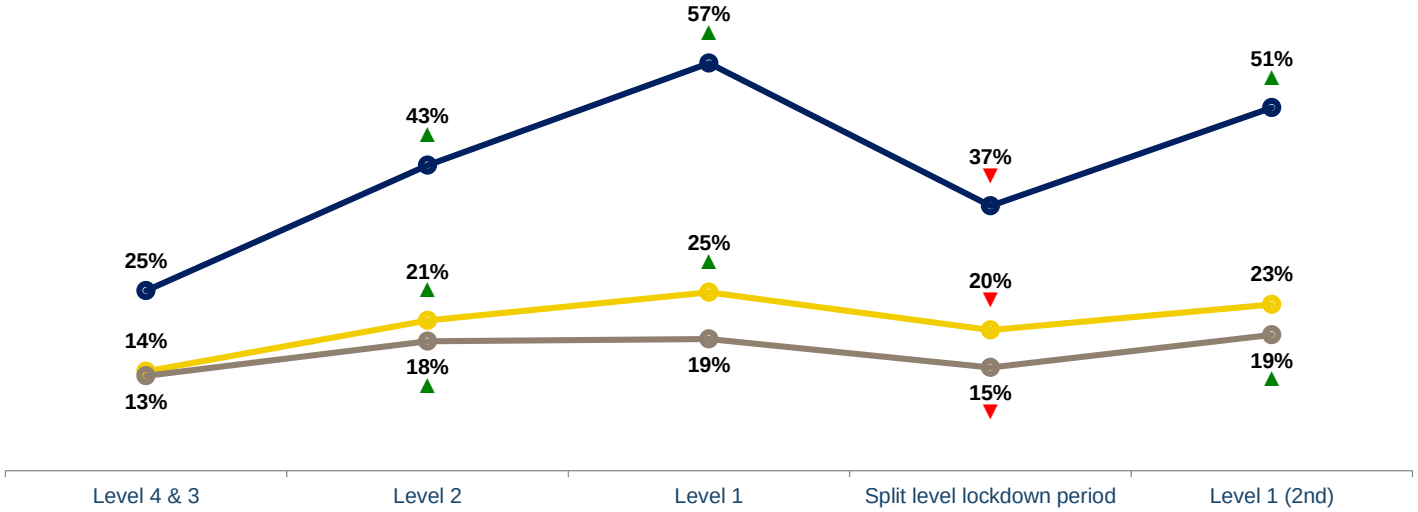


QPTIMAGE. Image Statements – And which transportation methods would you currently associate with each of the following qualities?
Base: All adults 65+ in New Zealand who would normally use public transport

While under 65s have generally been less likely to associate safety and hygiene with PT, they have recovered more significantly since the second lockdown period

Perceptions of public transport among under 65s – COVID related

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

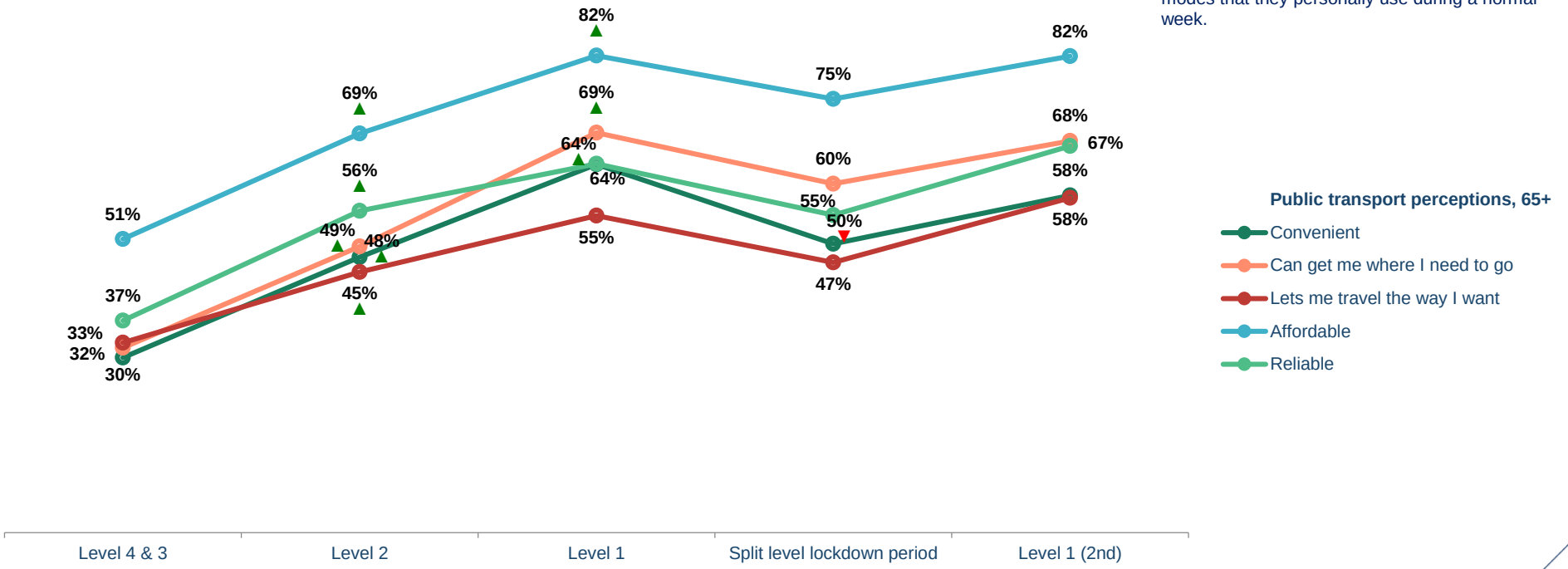


QPTIMAGE. Image Statements – And which transportation methods would you currently associate with each of the following qualities?
Base: All adults 15-64 in New Zealand who would normally use public transport

The perception of affordability is much more prominent among over the gold-card qualifying, and all practical perceptions are strengthening for public transport

Perceptions of public transport among 65+ – practical considerations

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

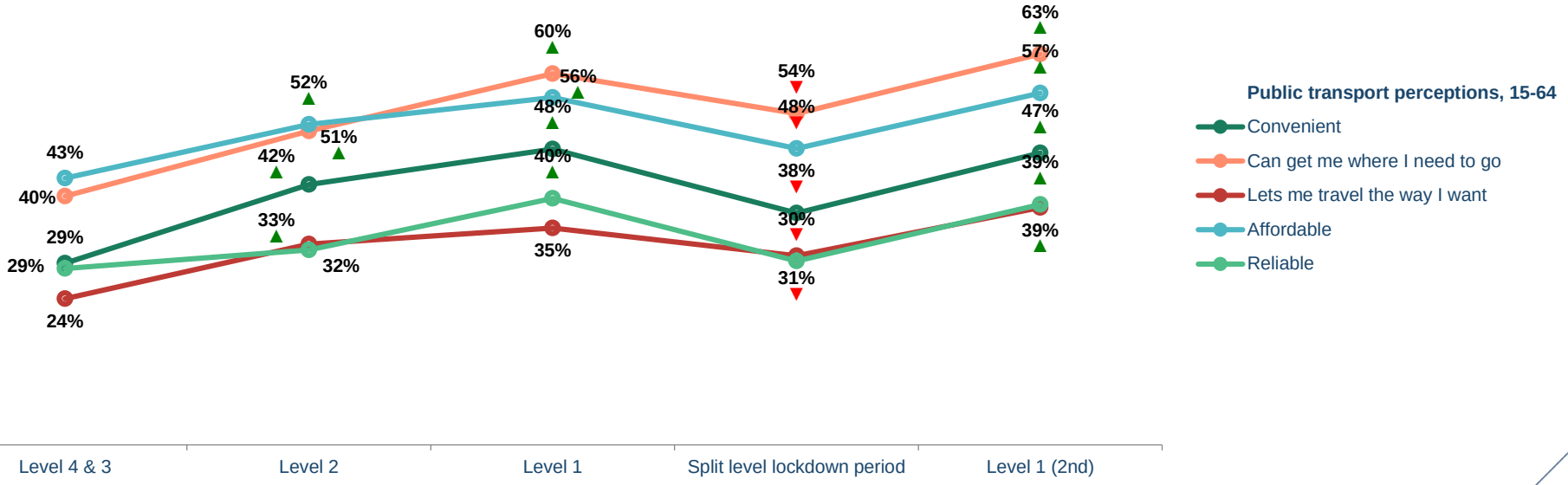


QPTIMAGE. Image Statements – And which transportation methods would you currently associate with each of the following qualities?
Base: All adults 65+ in New Zealand who would normally use public transport

Without the benefit of the gold card, perceptions of affordability aren't as strong for younger New Zealanders, but these perceptions are trending in the same way

Perceptions of public transport among under 65s – practical considerations

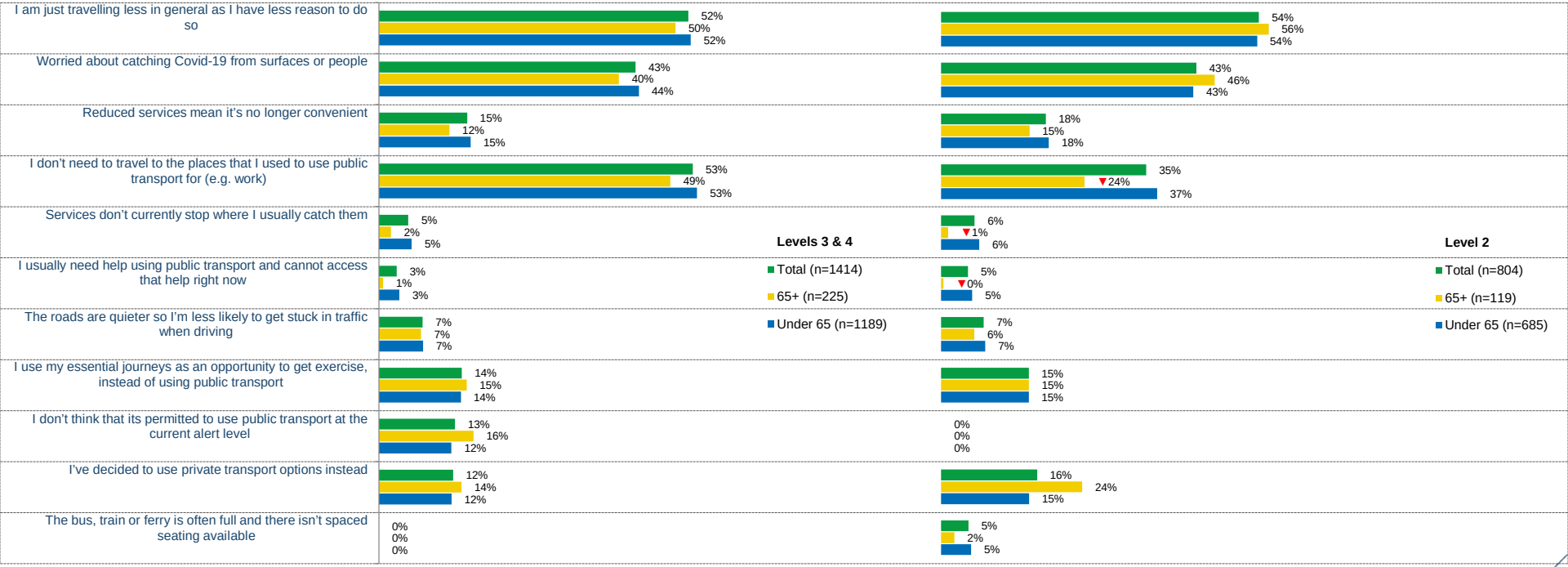
NB: users were only asked about transport modes that they personally use during a normal week.



QPTIMAGE. Image Statements – And which transportation methods would you currently associate with each of the following qualities?
Base: All adults 15-64 in New Zealand who would normally use public transport

During higher lockdown levels, over 65s generally did not differ greatly from the rest of the population in the barriers to public transport usage

Reasons for reducing public transport usage – level 4, 3 and 2 only

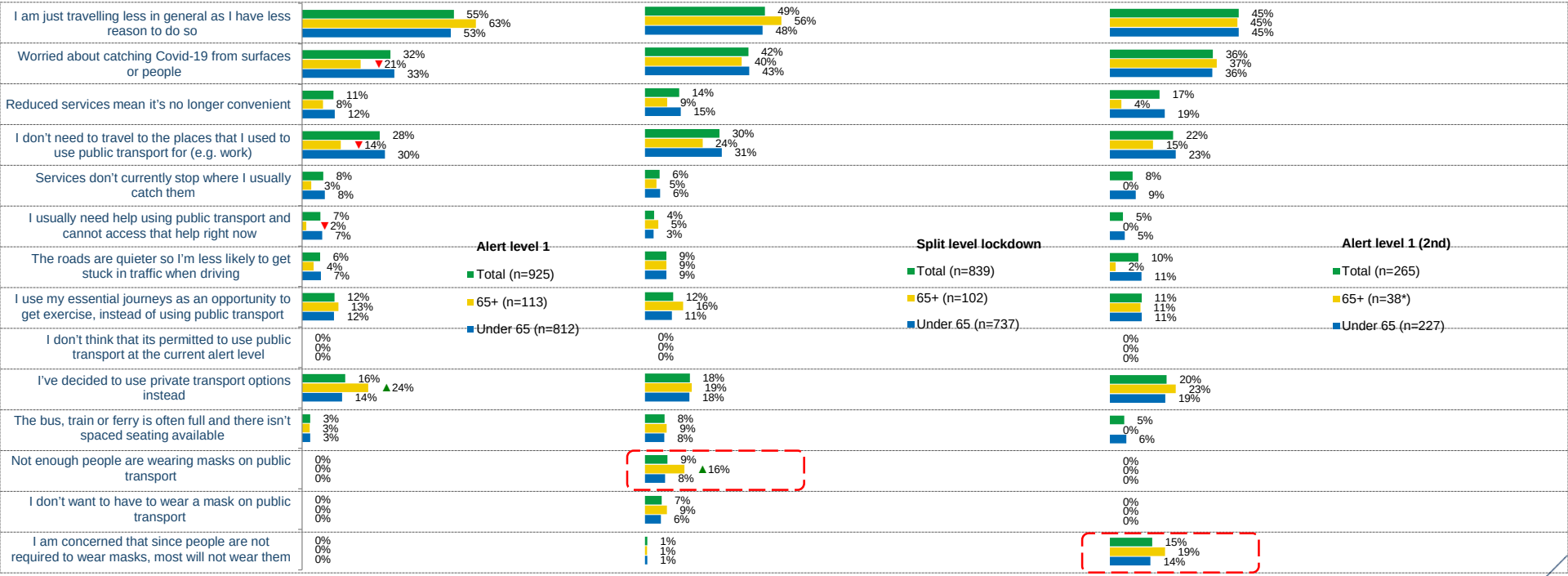


QPTUSE2. And for which, if any, of the following reasons, did you choose to use public transport this week?

Base: all adults 15+, 15-64 or 65+ in New Zealand who have decreased public transport use from pre-alert levels, interviews taking place during alert level 4, 3 or 2

It is notable that when this has been collected, over 65s have expressed greater than average concern about others not wearing masks on public transport

Reasons for reducing public transport usage – level 1, split alert level lockdown, second level 1 alert



QPTUSE2. And for which, if any, of the following reasons, did you choose to use public transport this week?

Base: all adults 15+, 15-64 or 65+ in New Zealand who have decreased public transport use from pre-alert levels, interviews taking place during alert level 1, split alert level period, 2nd level 1 period

**low base, interpret with caution*

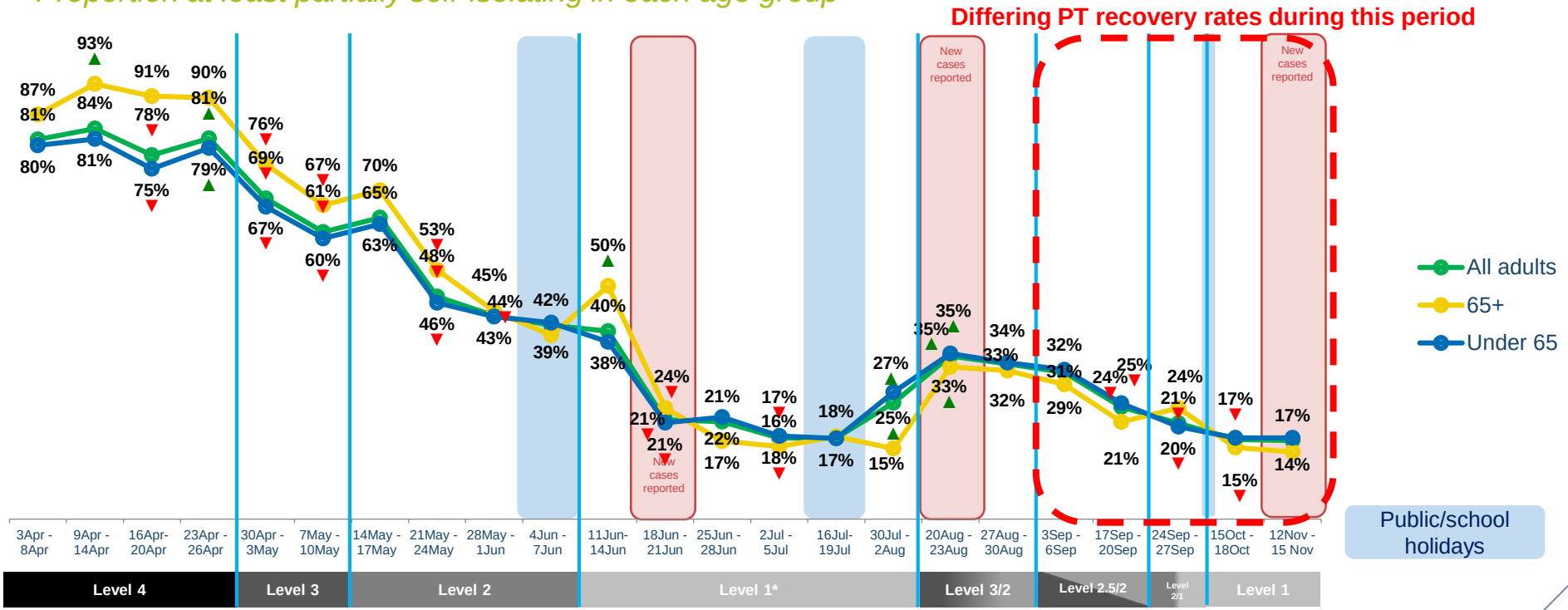
▲ Indicates a statistically significant increase against total sample

▼ Indicates a statistically significant decrease against total sample

Section 4 – Are over 65s travelling less compared to other age groups?

In the early stages of lockdown, rates of self-isolation were noticeably higher among over 65s, however, this trend did not persist after the first alert level 1 period

Proportion at least partially self-isolating in each age group

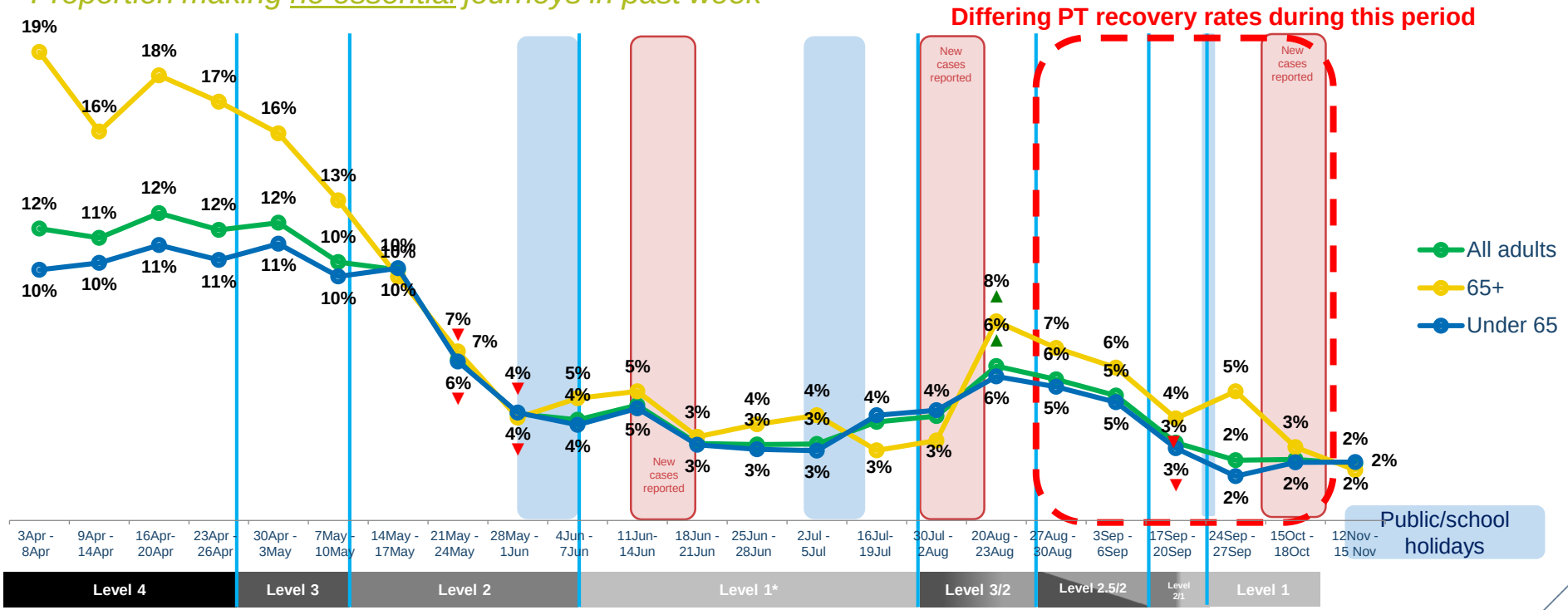


ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

*Base:all adults 15+ in New Zealand, all 65+ and all 15-64 *fieldwork frequency decreased from weekly during level 1*

During the 2nd lockdown, those 65+ were a little more likely to make *no* essential journeys, although this difference has disappeared with the return to level 1

Proportion making no essential journeys in past week



QJOURNEY2. 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, all 65+ and all 15-64 *fieldwork frequency decreased from weekly during level 1*

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