

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–11 weekly core report

16 June 2020

Disclaimer

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

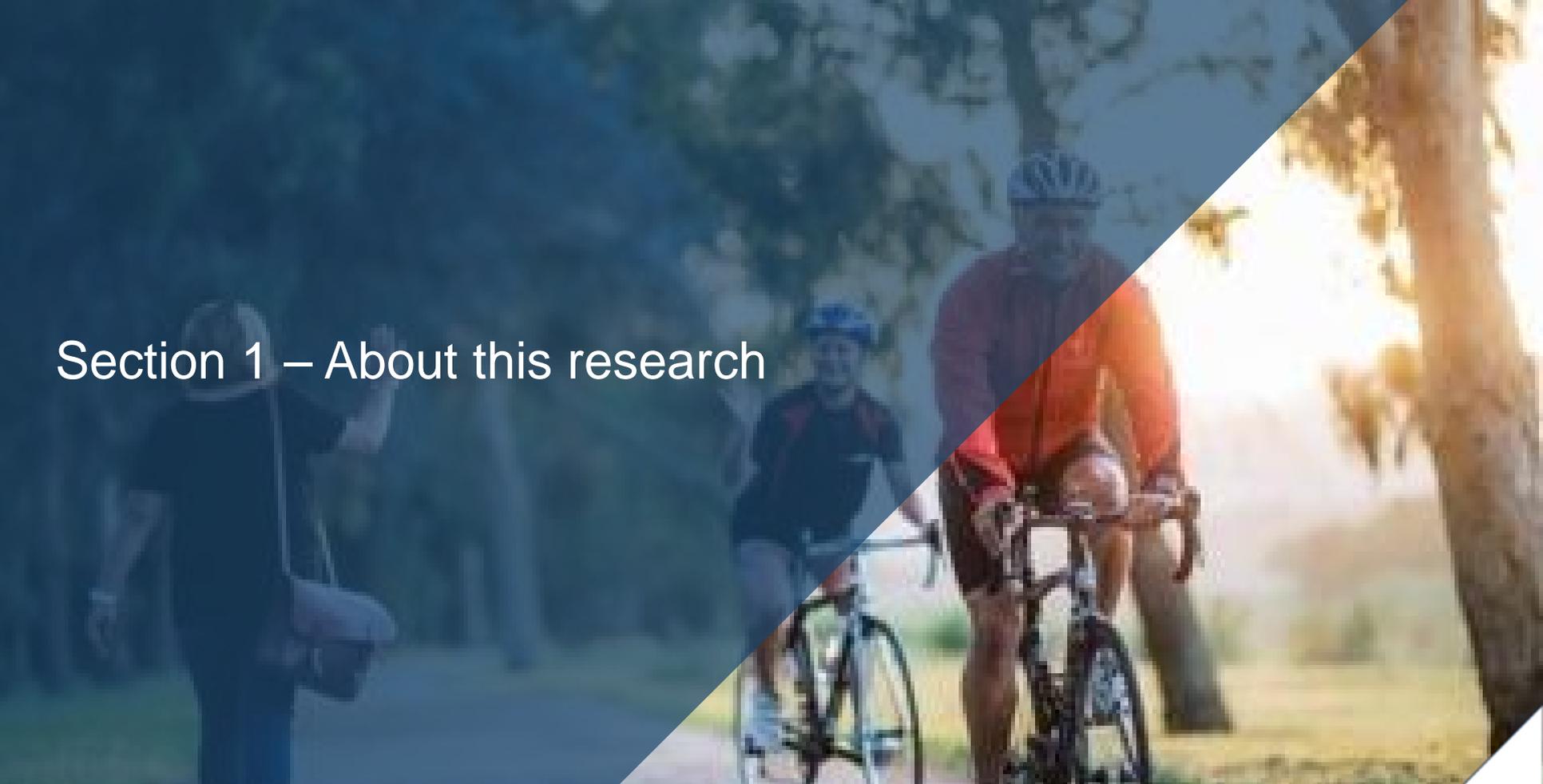
While Waka Kotahi provided investment, the research was undertaken independently, and the resulting findings should not be regarded as being the opinion, responsibility or policy of Waka Kotahi or indeed of any NZ Government agency.

For more information on the Covid-19 weekly tracker contact:
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Report content

COVID-19 transport impact

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Section 1 – About this research

Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

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:

- 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 and domestic travel undertaken and changes

- change is measured since February 2020.

Modal shift patterns and perceptual shifts

- including perceptions of public transport among users
- perceptions of various transports modes with regards to safety, hygiene, convenience, etc
- perceptions of potential shifts in work flexibility.

Measuring attitudinal shifts towards COVID-19

- using a Behavioural Science framework to understand current people's current state to facilitate potential interventions.

Questions to classify into a variety of segments of interest

- including journey profile, vulnerability, COVID-19 attitudes, economic, etc.

Ad hoc questions of interest

- including perceptions of future workplace flexibility, domestic tourism intentions, intention to return children to school, e tc.

Report notes (i)

Key information to note for this report

- This report is based on eleven waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves, combined sum of waves 5 and 6, combined sum of waves 7, 8 9 and 10, as well as individual waves where appropriate.
- The focus of this report is tracking trends and changes over time and how New Zealanders have adjusted their use of transport and travel behaviour. As this study was not conducted prior to level 4 restrictions, respondents were asked to recall their transport and travel behaviour prior to level 4 restrictions based on a 'normal week' i.e. in February this year.
- At a total population level, significance testing indicated in this wave 11 report is based on a statistically significant shift of results between waves 1 to 11, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs combined level 2 alerts vs level 1 alert (with only one wave of data).
- 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	Alert level 1
11	Thursday 11 June to Sunday 14 June	

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		Wave 11	
		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=1,268	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=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	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=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=213	7.13
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	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=106	9.85
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=318	5.3
Disability, Vulnerability and COVID-19**									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=140	7.92
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=286	5.63
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=140	8.11

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

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

Context: New Zealand COVID-19 timeline



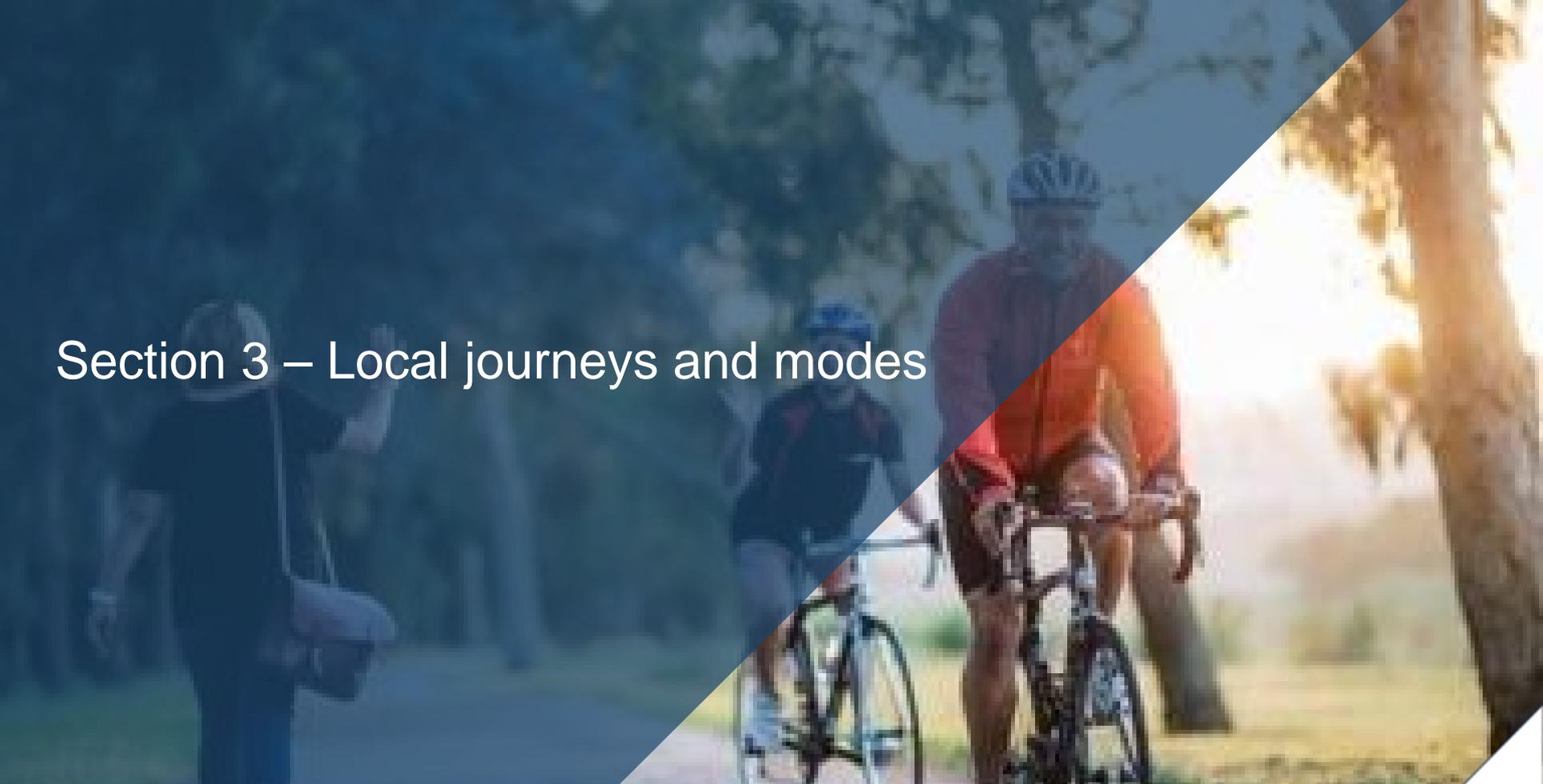


Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–11

Waka Kotahi COVID-19 transport impact tracker

- Wave 11 of fieldwork is the first under level 1 conditions, where there are no restrictions on assembly, which had previously ruled out a number of destinations for New Zealanders.
- Travel activity is continuing to return to normal, although a small minority are still self isolating in full in what still appears to be a response to COVID-19 concerns rather than normal behaviour.
- Local journeys increased at the beginning of level 1, particularly for work journeys and taking children to school.
- The proportion claiming to use public transport at least once a week has not increased under level 1 conditions. **Note that this does not reflect the volume of trips being made, just the proportion travelling at least once in a seven-day period.**
 - This doesn't appear to be a result of perceptual issues, with positive movements in these for trains and buses.
 - Instead, those who have decreased their public transport usage indicate that they're generally just travelling less.
 - There has been no recovery in the rate of public transport usage for the non-essential journeys either.
- After a wave 10 peak for Queen's birthday weekend, domestic holiday journeys returned to normal levels, resulting in a small net decrease in domestic journeys overall, with most other journey types not changing since wave 9.
- When it comes to domestic tourism, there have been some gradual changes over time in the proportions likely to travel and the proportions saying they will travel more, but this movement has not been significant wave on wave and is yet to result in a net positive projection of domestic tourist movement over the next six months.
- The proportion reporting that they shopped at least once for online groceries has not shifted significantly throughout lockdown, suggesting there has not been a lasting shift in channel used for this activity, with a similar pattern occurring for non-grocery items.
- Alongside the removal of many of the remaining lockdown conditions, there have been positive movements in the way New Zealanders perceive their capabilities and their motivation to get around, reflecting a lifting of all sorts of restrictions.
- Weather and seasonal conditions appear to affect the travel patterns of all types of New Zealanders, with nearly half saying they adapt the way they travel in winter, but few significant differences in this between demographic sub-groups and mode users. There is some variation according to region but it should be noted that different regions experience both winter and transport infrastructure in unique ways.

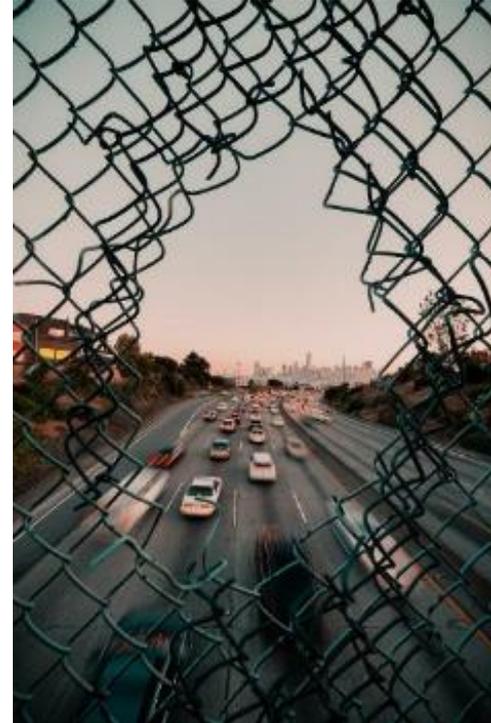


Section 3 – Local journeys and modes

Key findings – local journeys and modes

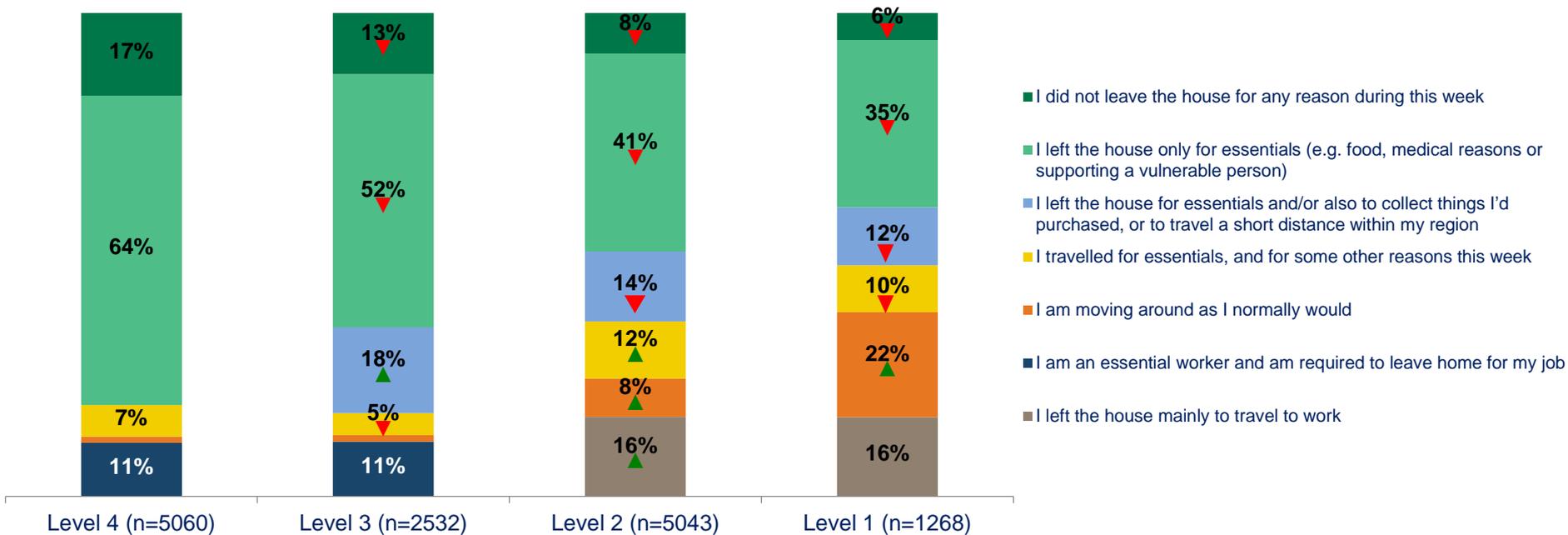
Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have been tracking both changes in journeys made and modes used.
- This section specifically focuses on travel for local, essential journeys during this time.
- In the first wave under level 1 conditions, about one in five people say that they travel as they normally would, but a sizable minority still indicate that they are self-isolating in some way.
- Journeys of almost all types have increased in level 1, with nearly half travelling to work for the first time since lockdown began and parents taking children to school at roughly the same incidence as pre-lockdown.
- The recovery in public transport usage has stalled since the beginning of level 2, with consideration also stalling in the first week of level 1, particularly for buses.
- At this stage, it doesn't look like perceptual issues are holding buses and trains back, with gains made for both in a variety of image scores.
- Those decreasing their public transport usage in level 1 are more likely to cite a reduced need for journeys than any other reason.
- Workers who have shifted commuting modes tend to indicate that their current mode is more convenient than their previous mode.



Activity has increased further in level 1, with one in five now saying that they're moving around as they normally would

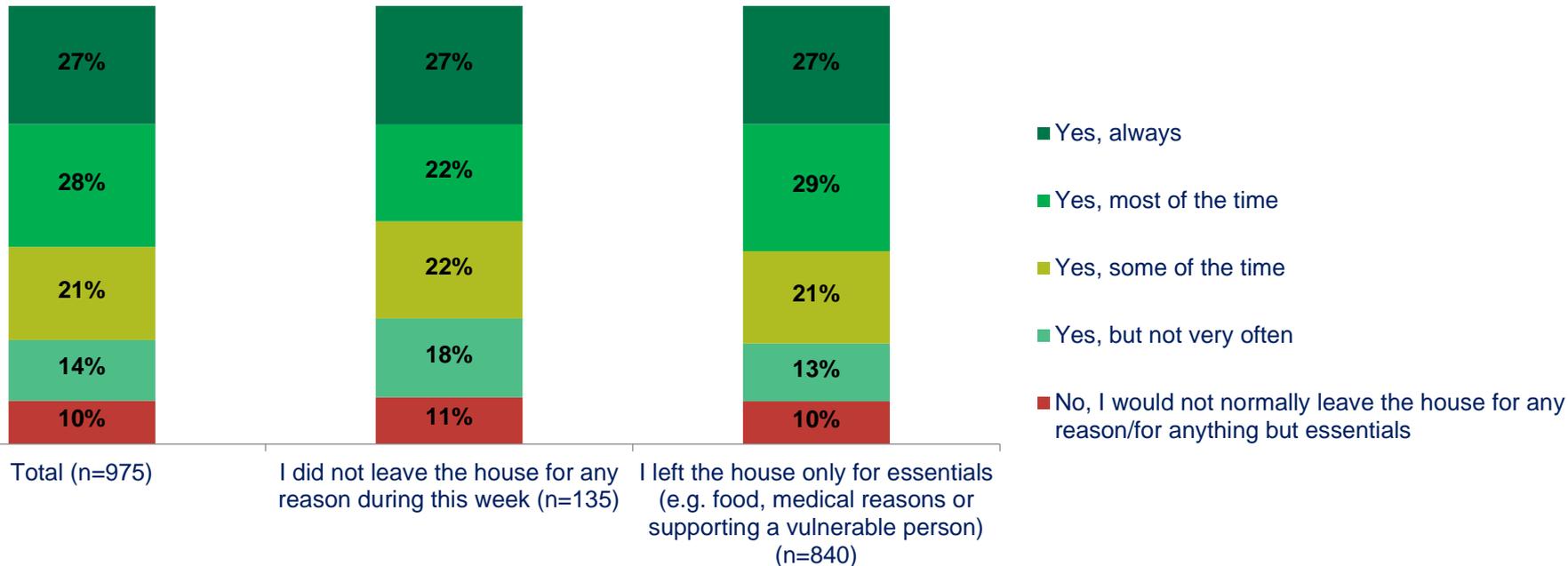
Reported activity and movement during the past seven days by alert level, excludes exercise



ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
 Base: all adults 15+ in New Zealand

Nine in 10 of those not currently travelling indicate that this is abnormal behaviour for them

Reported activity and movement during the past seven days by alert level, excludes exercise

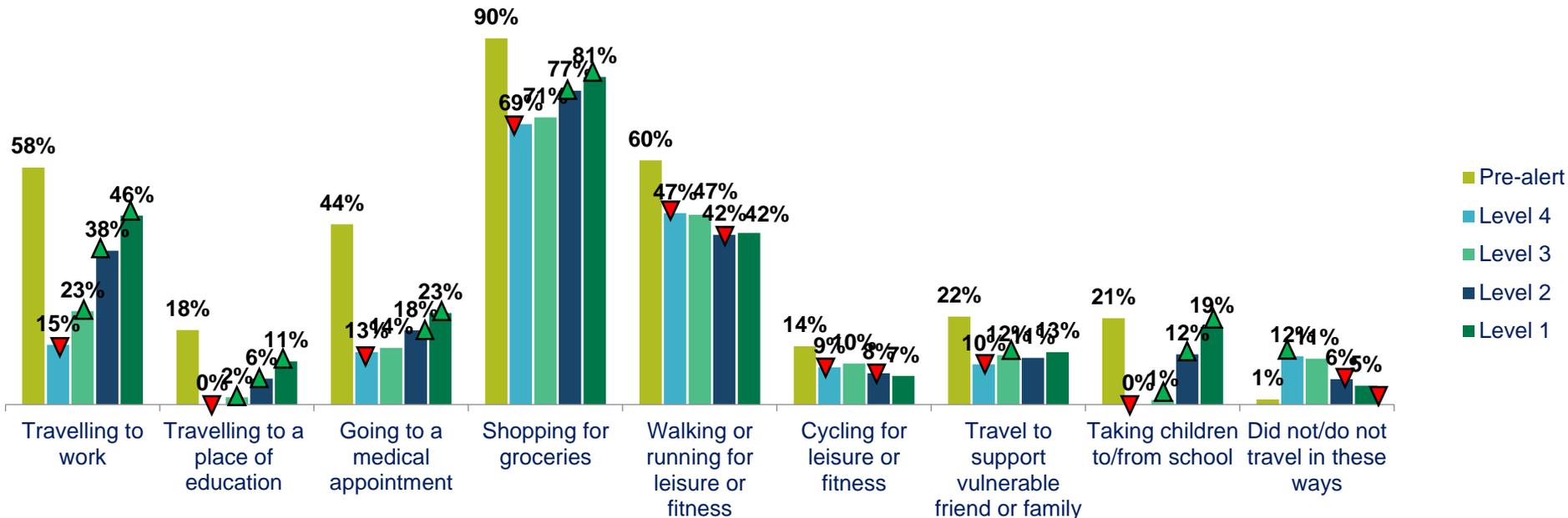


ISO_2_TRAVEL. In a typical week outside of any COVID-19 alert conditions (e.g. in February this year), would you normally leave the house for any other reasons?
Base: all adults 15+ in New Zealand



Almost all journeys increased significantly from levels 4 to 1, with the proportion travelling to work now 12 points short of normal levels

Reported activity and movement during the past seven days by alert level



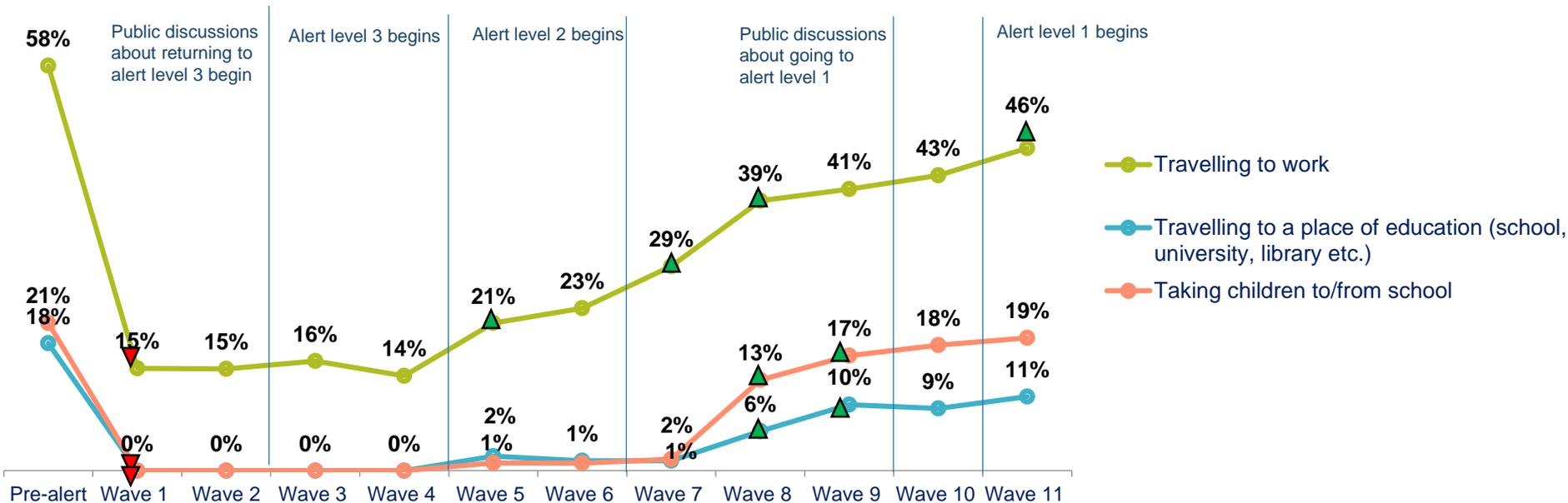
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand in Benchmark wave (n=3,759); Level 4 (n=5,060); Level 3 (n=2,532); Level 2 (n=5,043); Level 1 (n=1,268)



The proportion taking children to school is now almost equivalent to pre-lockdown levels

Reported activity and movement during the past seven days by wave



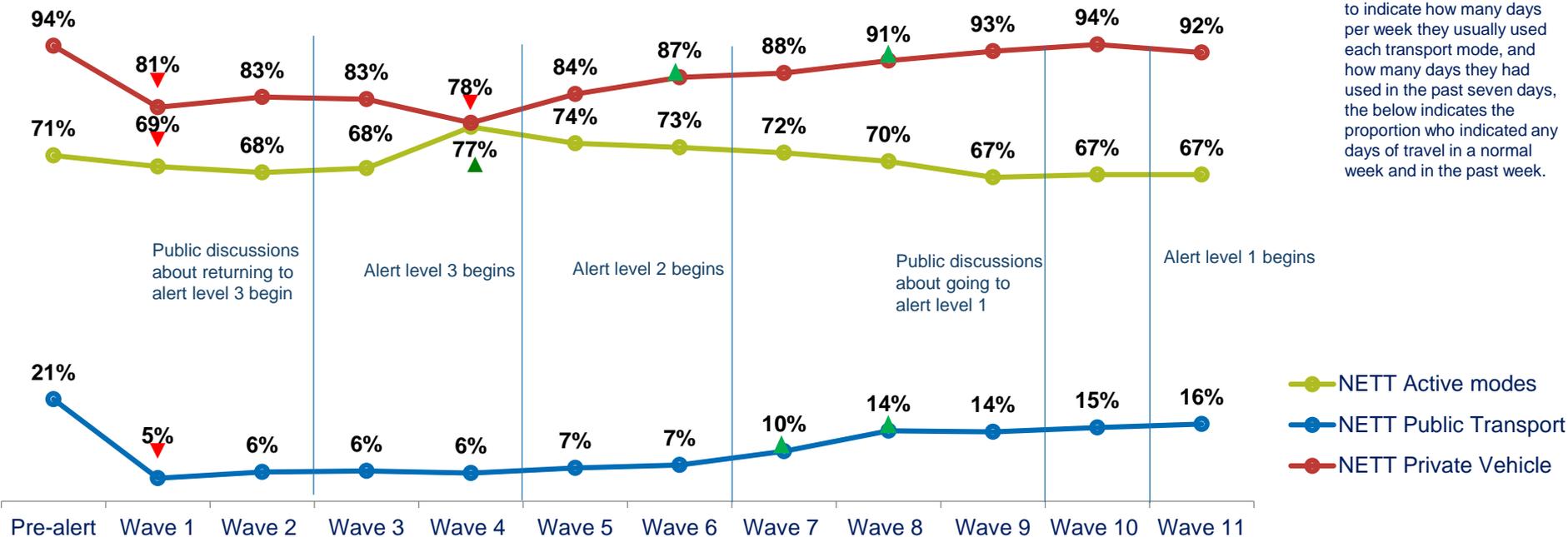
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)?/And which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268)



The number of weekly public transport users has not significantly increased since alert level 2

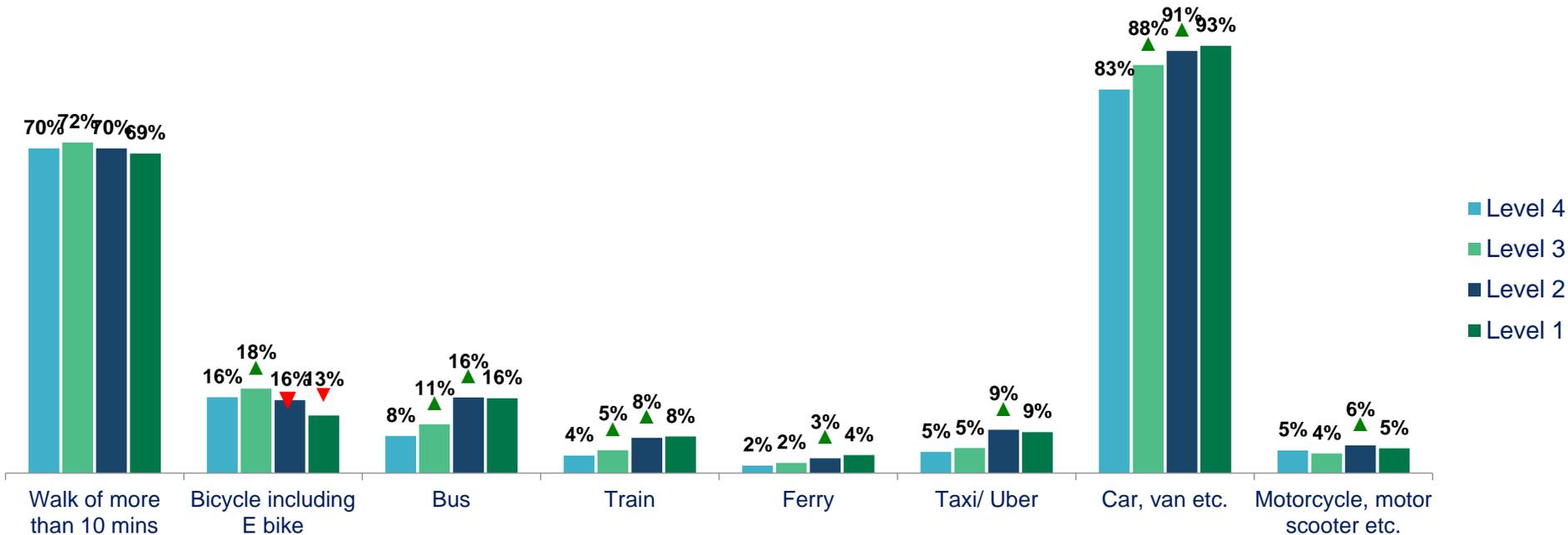
Changes in mode usage by wave



QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a *normal* week (e.g. in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268)

Consideration for most modes peaked in level 2, but has not increased during the first week of level 1

Mode consideration: coming week by alert level



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

Base: all adults 15+ in New Zealand who normally travel;



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

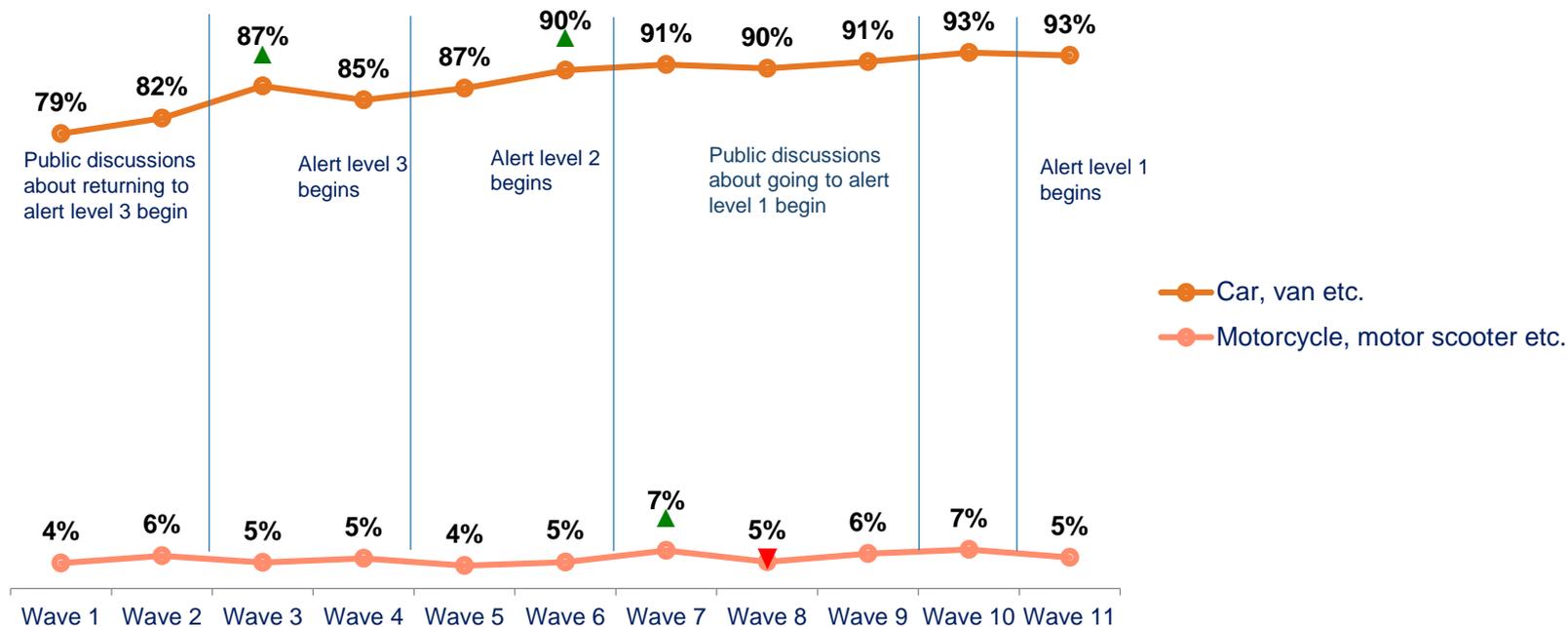
Private vehicle consideration matches pre-alert usage for both cars and motorcycles

Mode consideration: coming week by wave

Pre-alert usage

Car ●
(93%)

Motorcycle ●
(5%)



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

Base: all adults 15+ in New Zealand who normally travel;



Indicates a statistically significant increase from previous time period



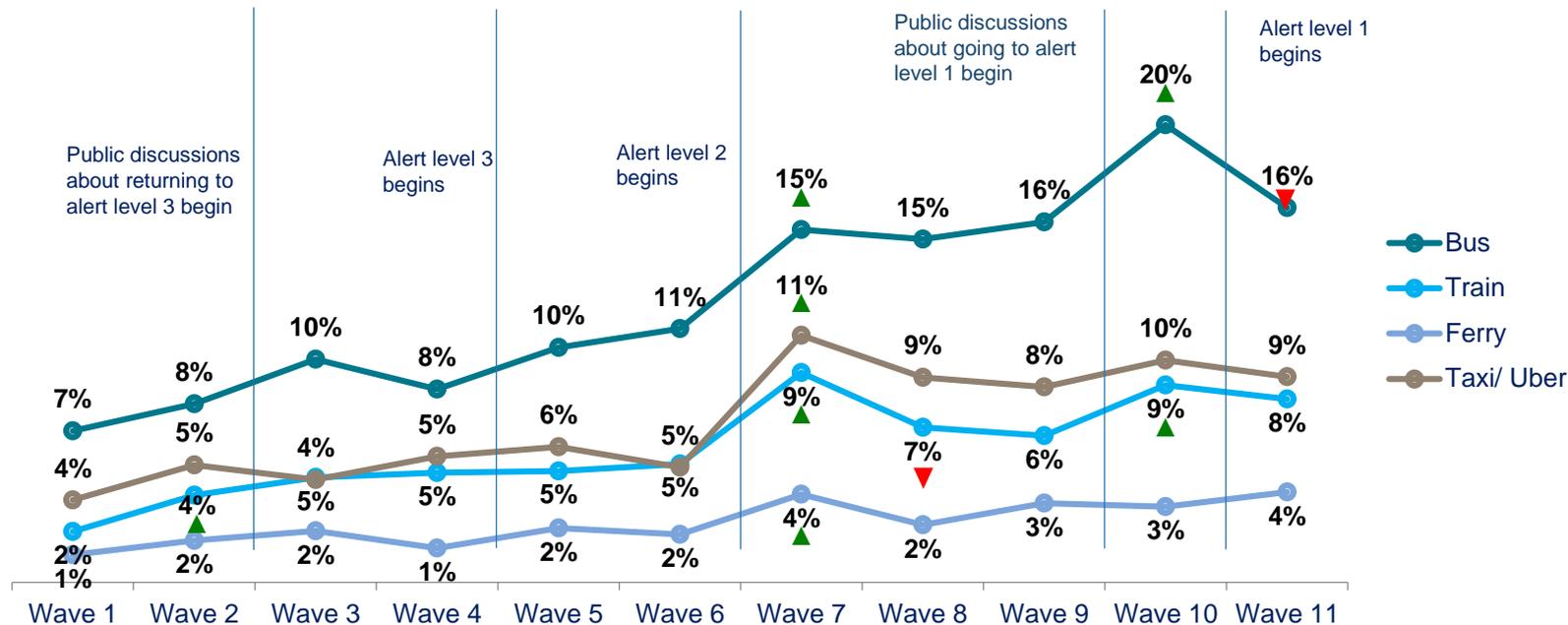
Indicates a statistically significant decrease from previous time period

Bus consideration peaked in level 2, but this has not been sustained into the first week of level 1

Mode consideration: coming week by wave

Pre-alert usage

Bus (19%)
Taxi/Uber (7%)
Train (6%)
Ferry (3%)



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

Base: all adults 15+ in New Zealand who normally travel;



Indicates a statistically significant increase from previous time period

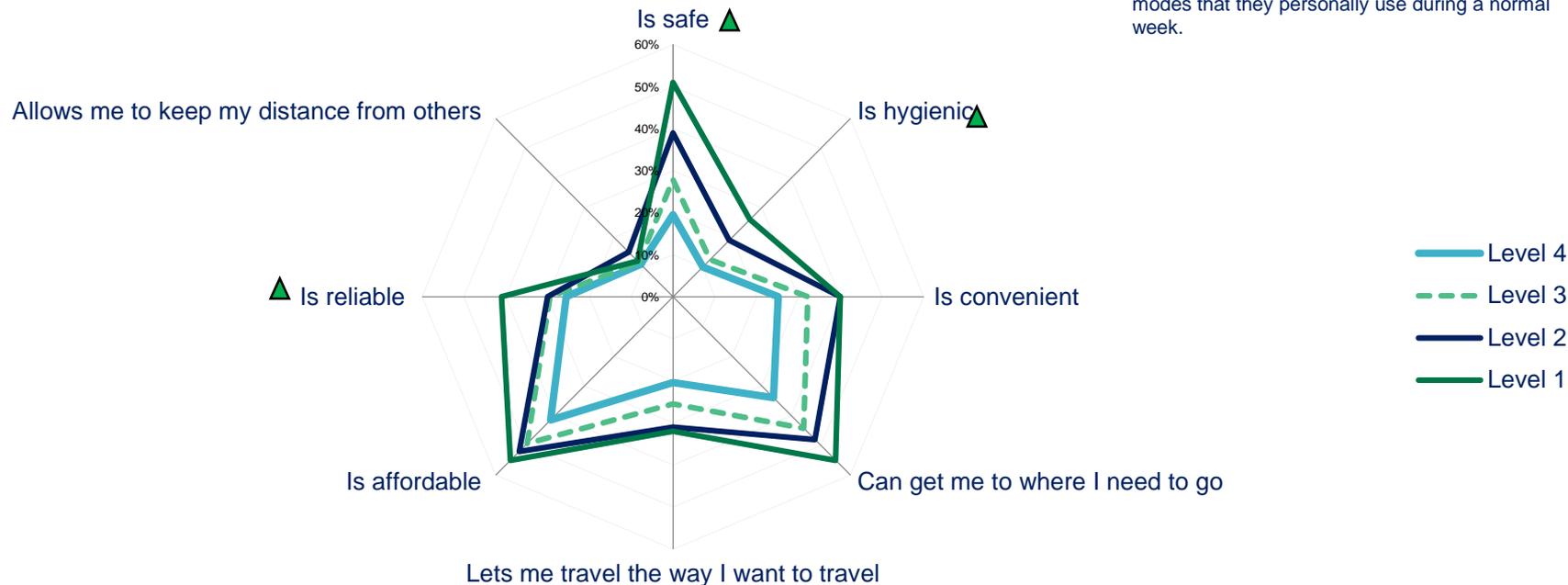


Indicates a statistically significant decrease from previous time period

Bus perceptions have improved again on hygiene and on safety, with reliability also up significantly, but ability to distance and convenience have not improved

Perceptions of the bus

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

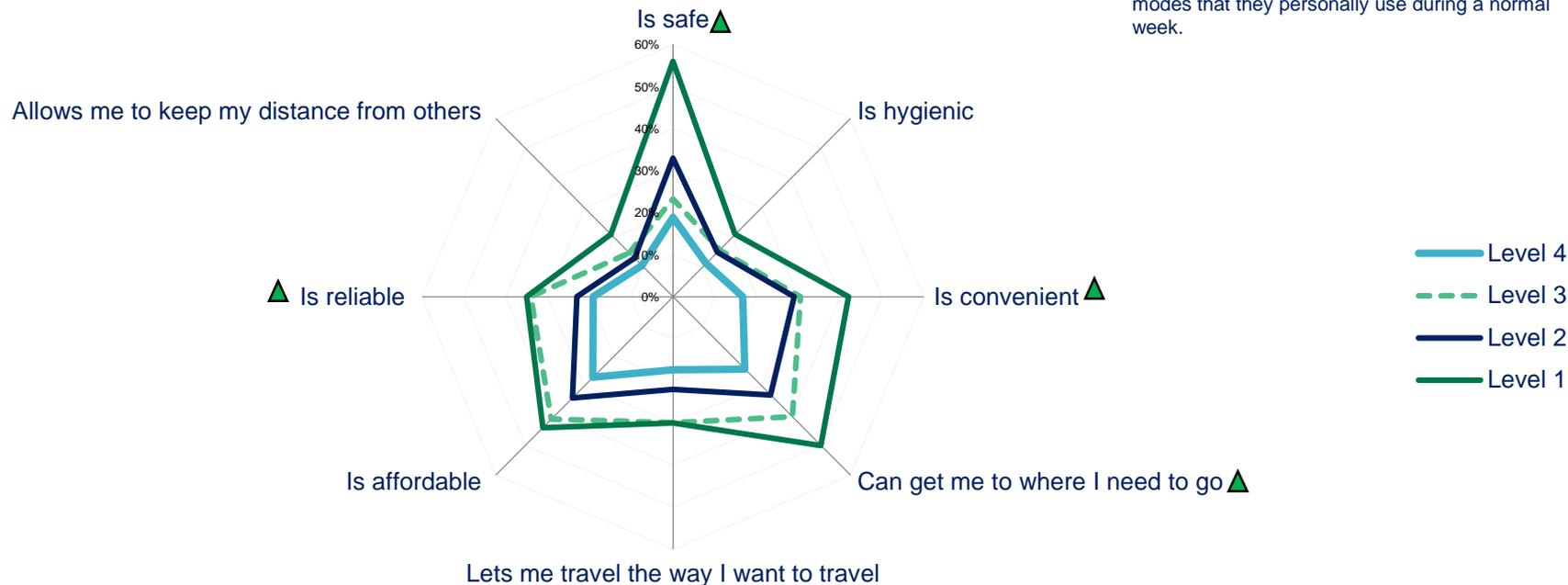


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: New Zealanders who travel by Bus normally: level 4 (n=943), level 3 (n=452); level 2 (n=981); Level 1 (n=219)

Trains have also improved perceptions since level 1, now more associated with safety, convenience, reliability and being able to get where you need

Perceptions of the train

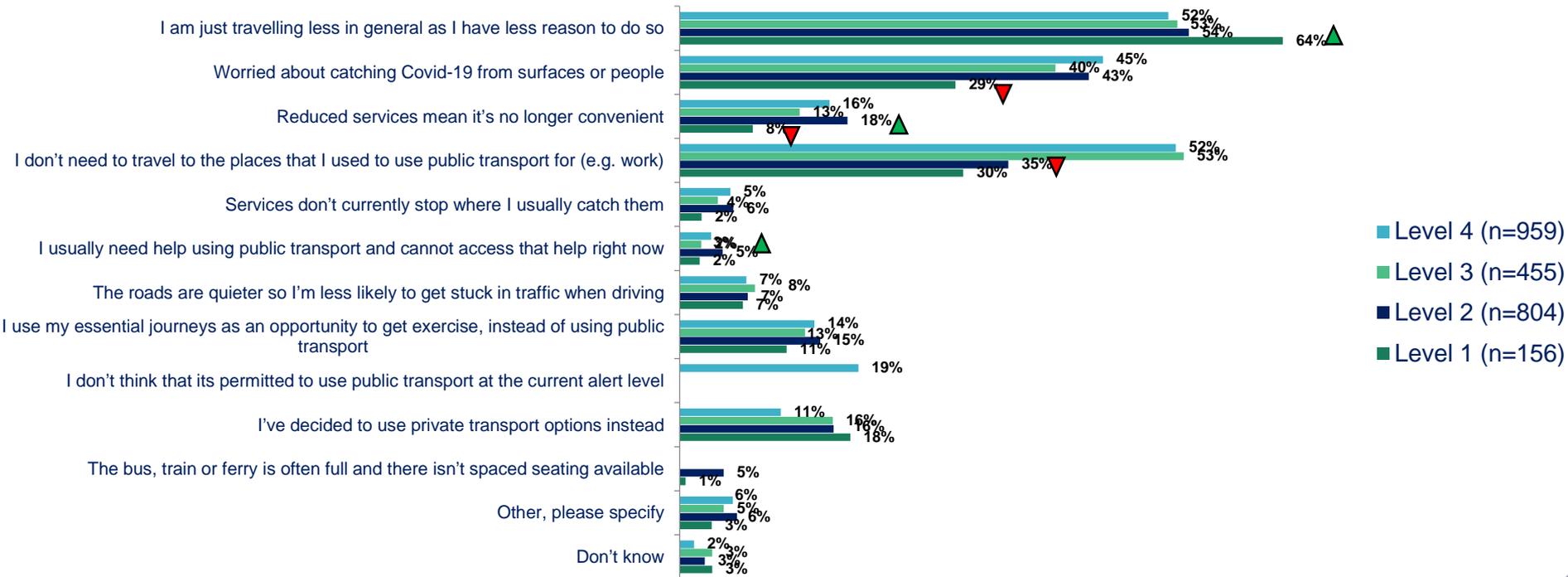
NB: users were only asked about transport modes that they personally use during a normal week.



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by train normally: level 4 (n=323), level 3 (n=160); level 2 (n=407); level 1 (n=82)

Those decreasing their public transport usage in level 1 are more likely to cite a reduced need to travel than those in higher alert levels

Reasons for decrease in PT usage

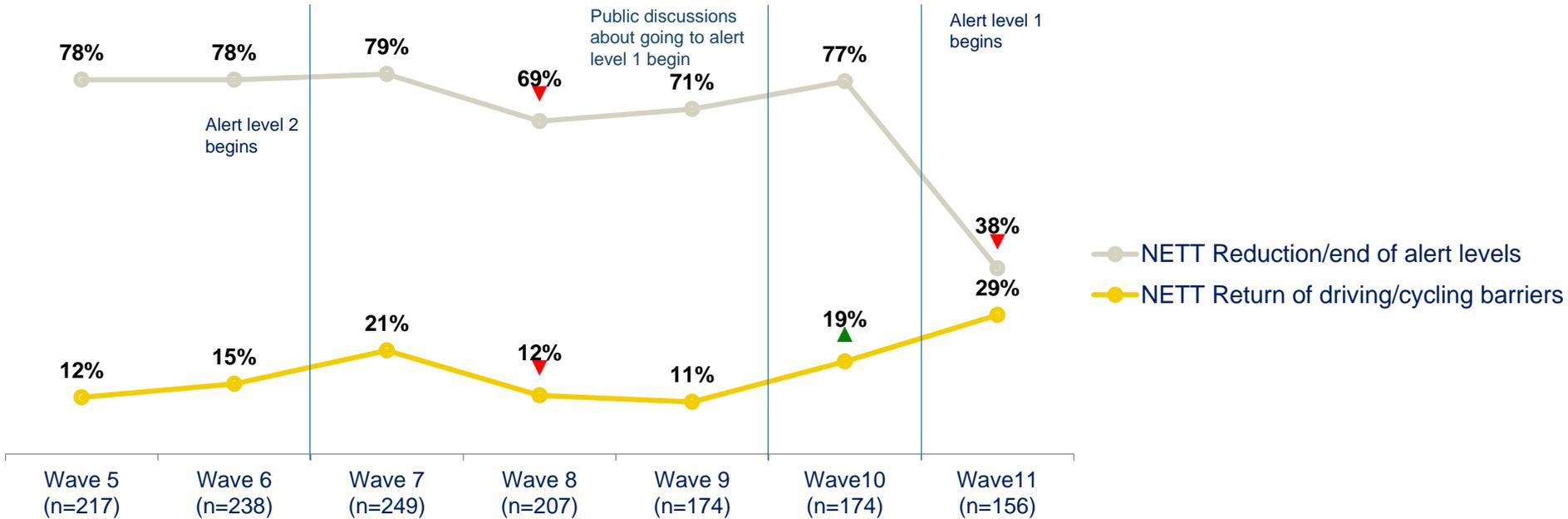


QDEC. For which, if any of the following reasons, has your use of public transport decreased?
 Base: decreasing PT usage in past week



With the beginning of level 1, fewer are citing a reduction or end to alert levels as the thing that will return them to public transport usage

Triggers for returning to public transport usage in the future

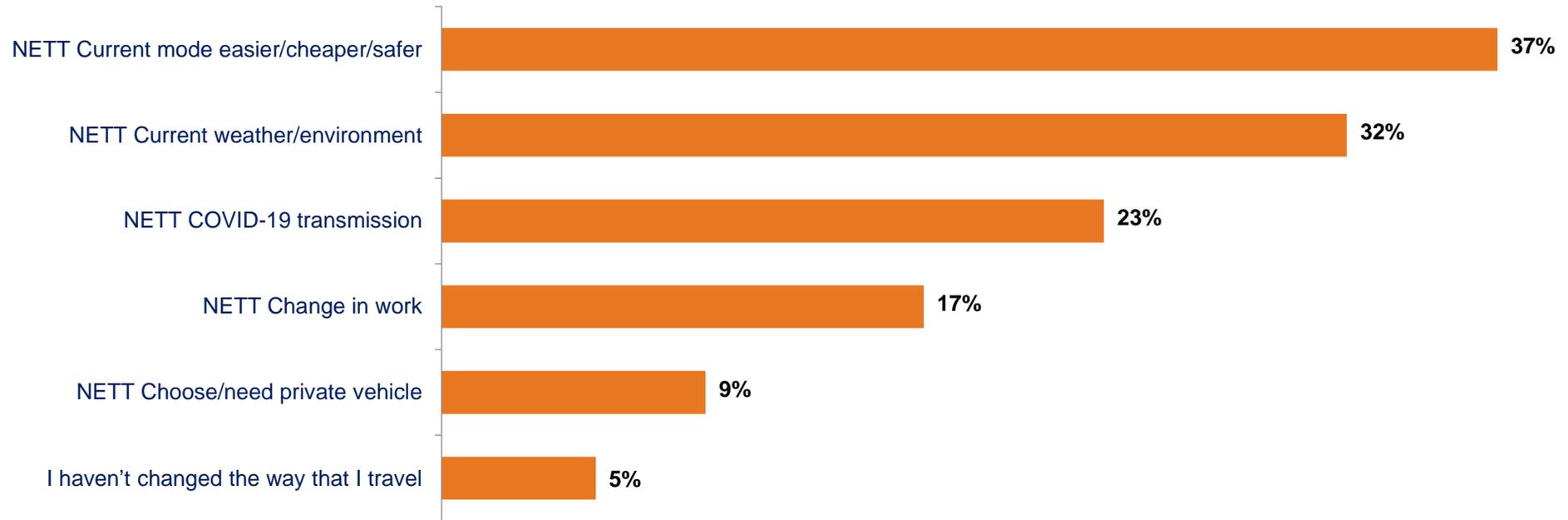


QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?
Base: decreasing PT usage in past week



The perception that the current chosen mode is more convenient in some way is a bigger reason for changing commute than any other reason

Reasons for changing commute mode



QWORKMODE. You indicated that in the past seven days you have travelled to work using a different mode to what you would have during a normal week. (e.g. in February of this year)
For which, if any of the following reasons did you change the way that you travelled to work?
Base: all adults 15+ in New Zealand who have changed commute mode (n=83)



Section 4 – Non-essential & domestic journeys

Key findings – non-essential & domestic journeys

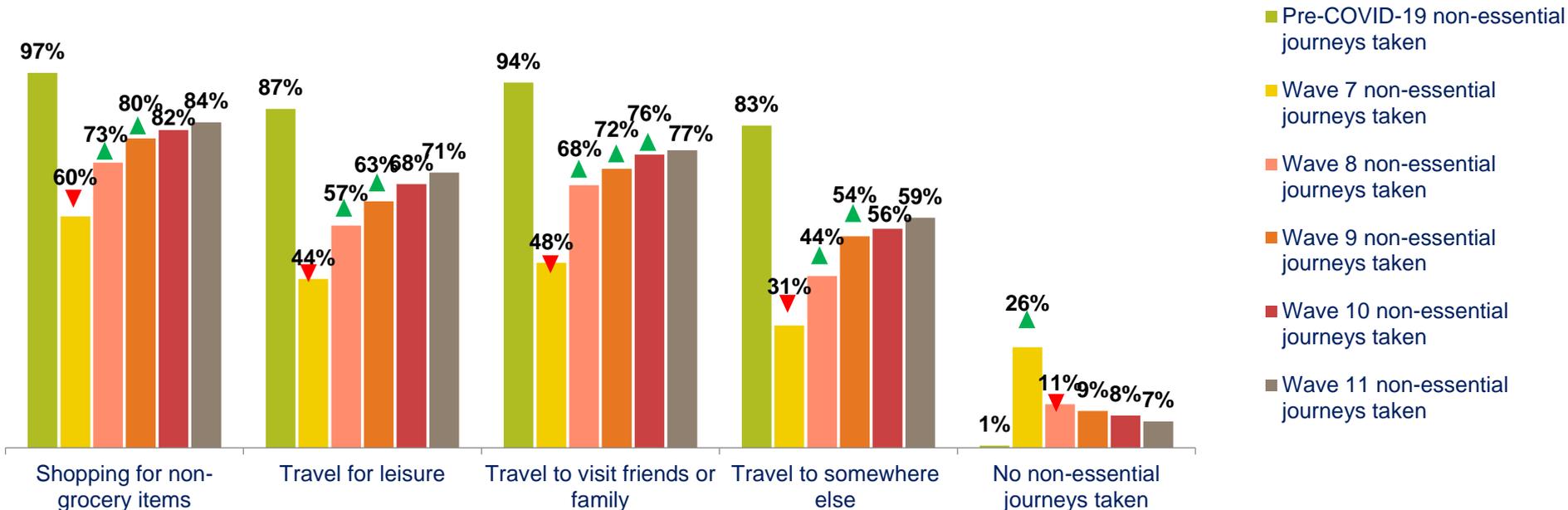
Waka Kotahi objective – how is non-essential & domestic travel changing?

- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have begun to measure non-essential journeys, and the ways domestic inter-regional travel is being taken up in level 1.
- The reported incidence of all types of non-essential journeys increased significantly when these journeys were permitted in level 2 but has subsequently plateaued.
- Those taking these sorts of journeys are still far more likely to drive, with no significant increase in public transport usage recorded so far, and a significant drop off in active mode usage during the most recent week.
- The narrative with inter-regional travel is much the same, with no significant change in any of the domestic journeys taken during wave 11, following a peak in holiday trips during wave 10.



For the second wave, the incidence of most non-essential journeys did not increase significantly, with most some way short of pre-COVID-19 levels

Non-essential journeys

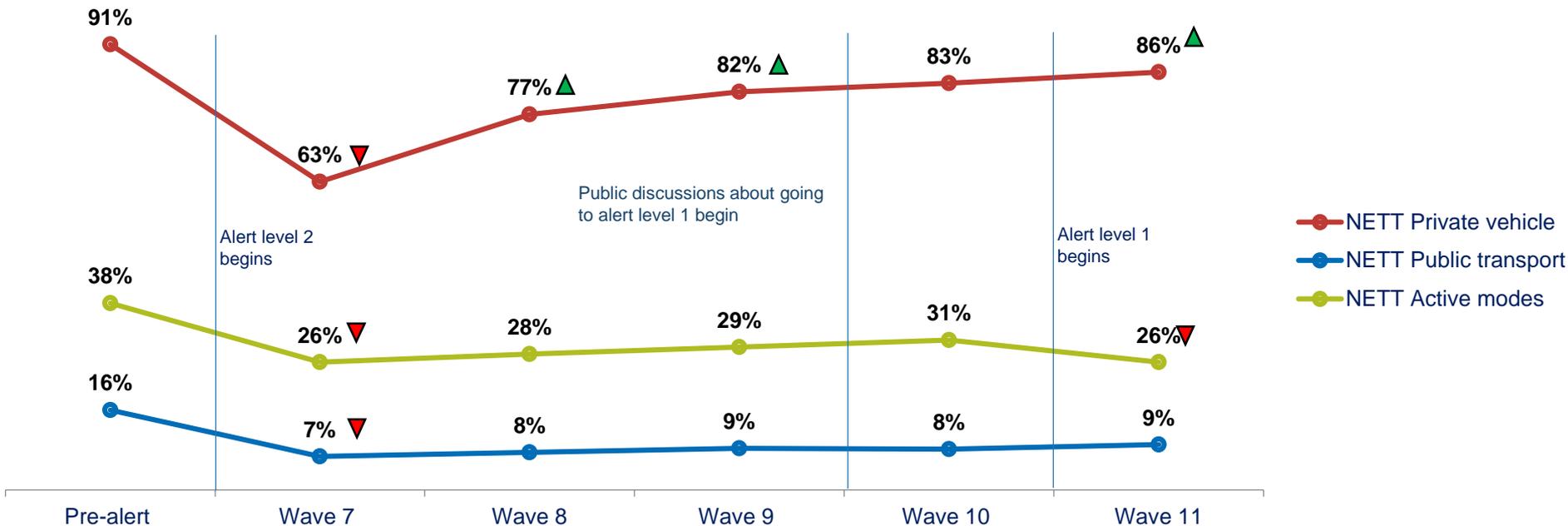


QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
 Base: all adults 15+ interviewed during level 2 in New Zealand (n=6,311)



Private vehicle usage for non-essential journeys continues to trend upward, with no increase in public transport usage so far

Mode usage: non-essential journeys



QMODE1A/2A. How would you normally make each of the following types of journeys? / And thinking about other types of journeys you might have made in the past seven days.

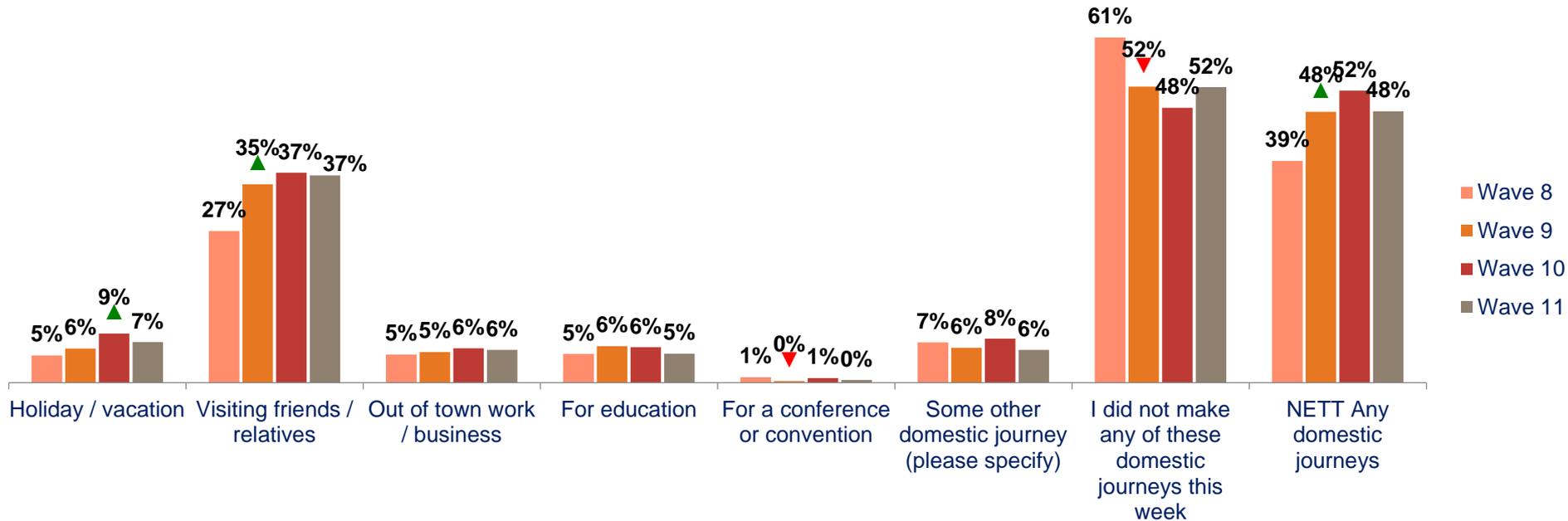
How, if at all did you make each of the journeys listed below in the past seven days?

Base: all adults 15+ interviewed during level 2 in New Zealand, pre-alert modes (n=3,782); wave 7 (n=1,263); wave 8 (n=1,264); wave 9 (n=1,255); wave 10 (n=1,261); wave 11 (n=1,268)



Holiday travel peaked the week of Queen's birthday weekend, with no significant increases in domestic journeys during the first week of level 1

Domestic journeys in the past seven days by wave



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

Base: all adults 15+ in New Zealand; wave 8 (n= 1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268)



The background image shows a person in a dark jacket and hat walking on the left, and two cyclists on the right. One cyclist is in a red jacket and the other is in a dark jacket. They are on a paved path with trees in the background. A diagonal blue line separates the dark blue left side from the lighter right side.

Section 5 – Future domestic tourism

Key findings – future domestic tourism

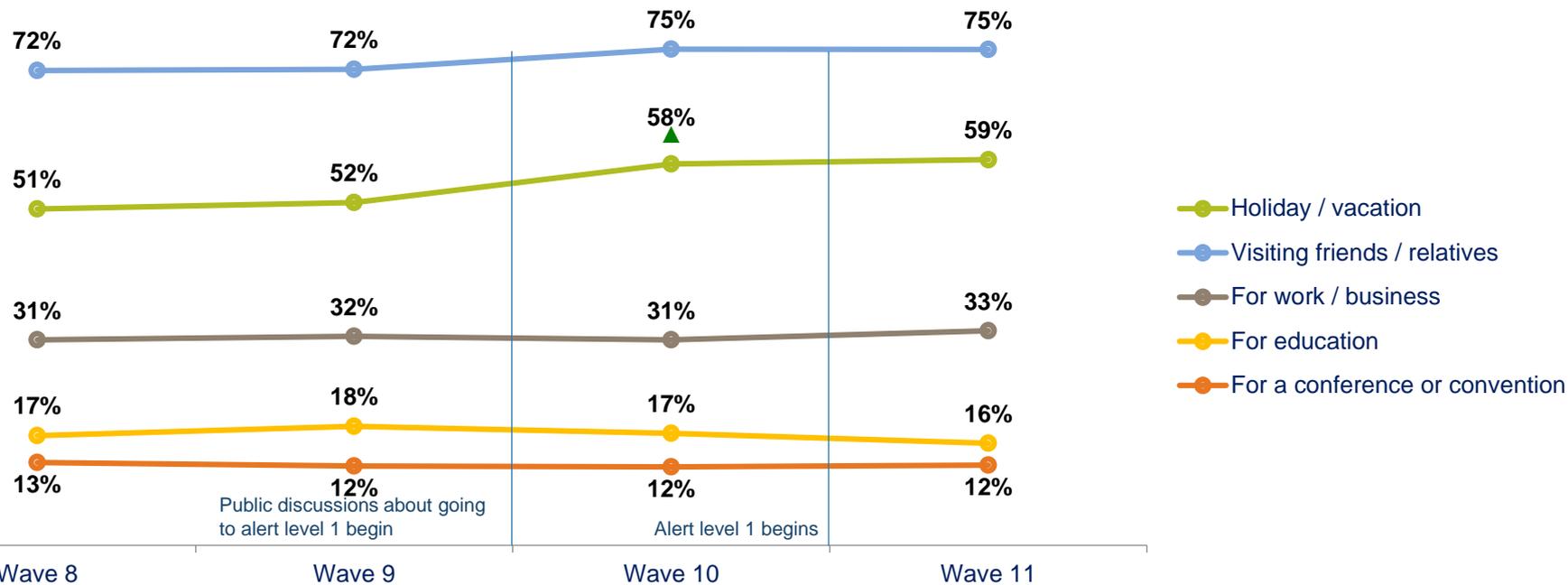
Waka Kotahi objective – how will domestic tourism change going forward?

- In light of restricted international travel, it is important to understand how domestic travel and tourism may change and impact New Zealand's travel infrastructure.
- Given that tourism travel is more ad-hoc in nature with journeys being less frequent, attitudes appear to change more gradually as they are confronted less often.
- The proportion saying that they are likely to travel for each tourist reason remains stable through level 2 into level 1.
- However, there has been a gradual upward trend in the net expectation of travel during the next six months, to the point that respondents are indicating that travel to visit friends and relatives may happen at the same rate as last year.
- In terms of their reasons for thinking they will travel more, there hasn't been a marked shift in motivation throughout measurement, with desire to visit friends and support New Zealand tourism among the top reasons.
- As expected, the proportion citing COVID-19 concerns as a reason for planning to travel /less has dropped off in level 1, corresponding with an increase in worries about affordability and cost.



Consideration of all types of longer distance domestic tourism has not significantly increased

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

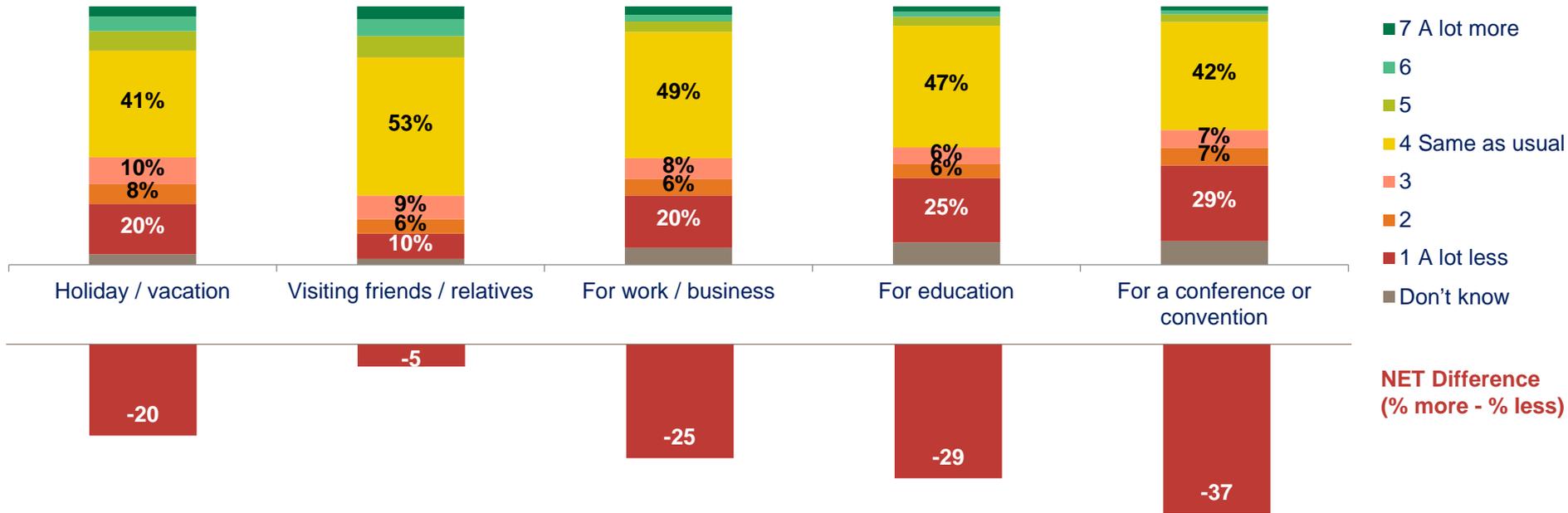


FDT1. How likely are you to make following types of domestic journeys in the next six months?
Base: all adults 15+ in New Zealand



At this stage, projected intention for tourism travel is for a net decline, while travel to visit friends and family is projected to also decrease, but not to the same magnitude

Intention to travel more or less domestically



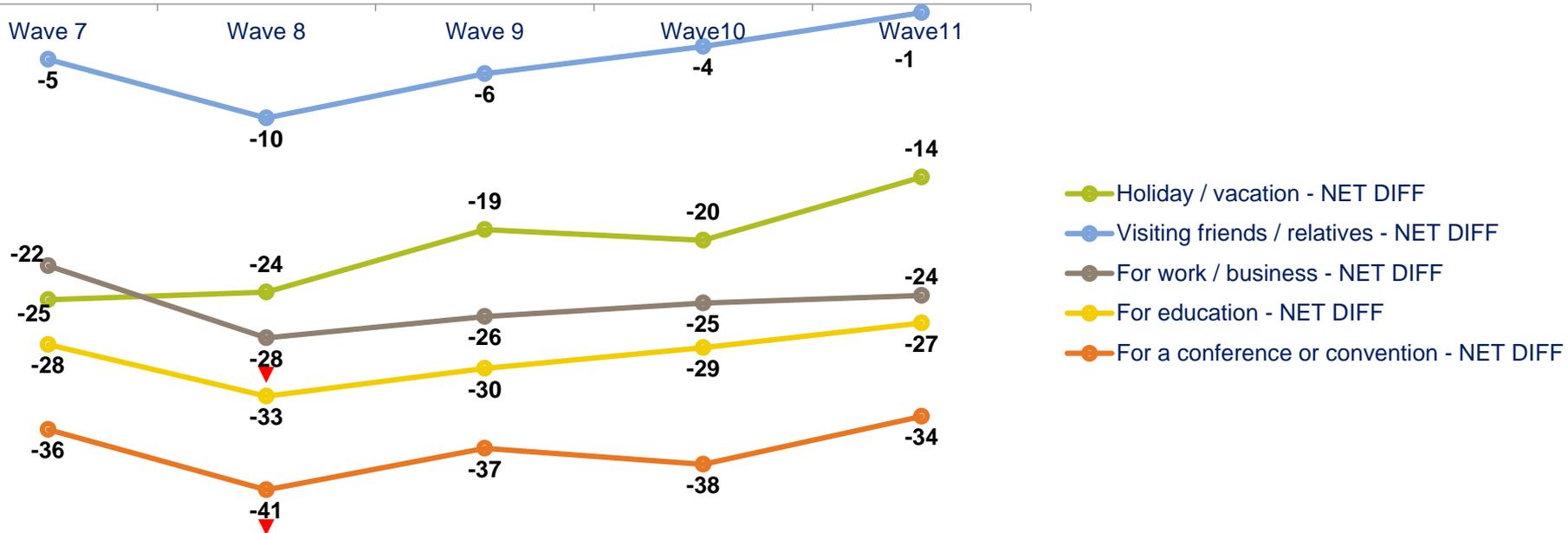
FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand



There has been a sustained increase in the NET amount of intended visitation travel, to the point that it is almost neutral

Intention to travel domestically



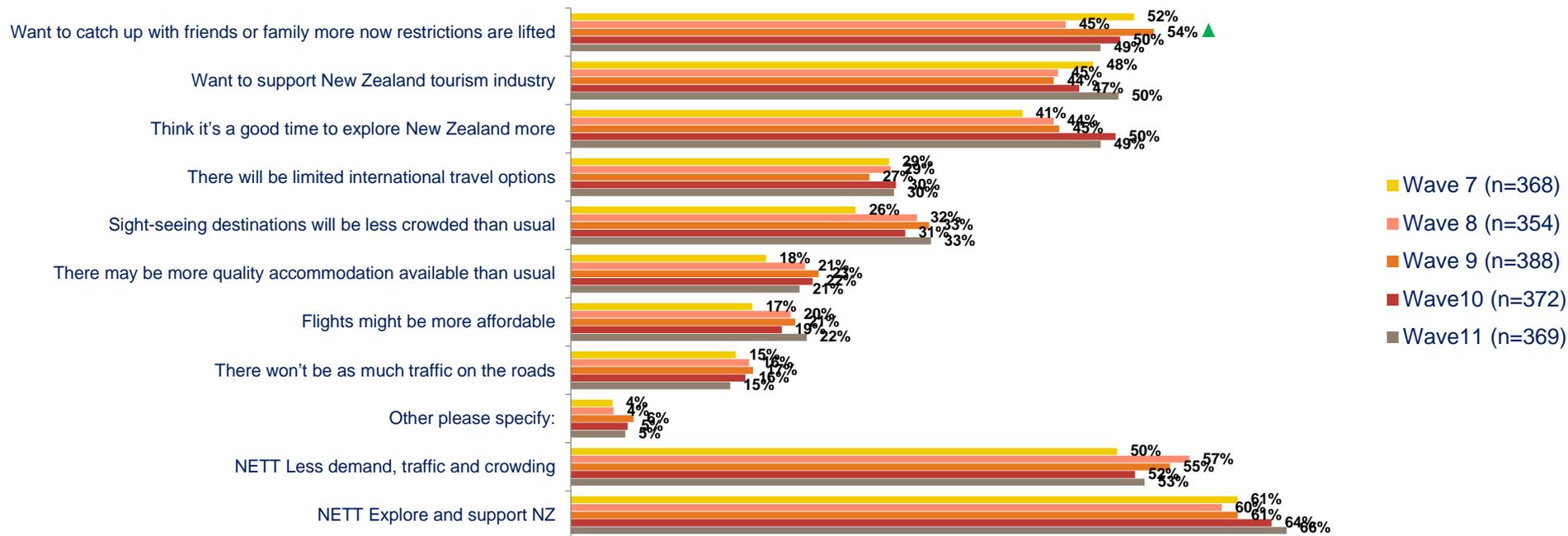
FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand



There has not been much significant movement in terms of the main reasons given for travelling more

Reasons for travelling more



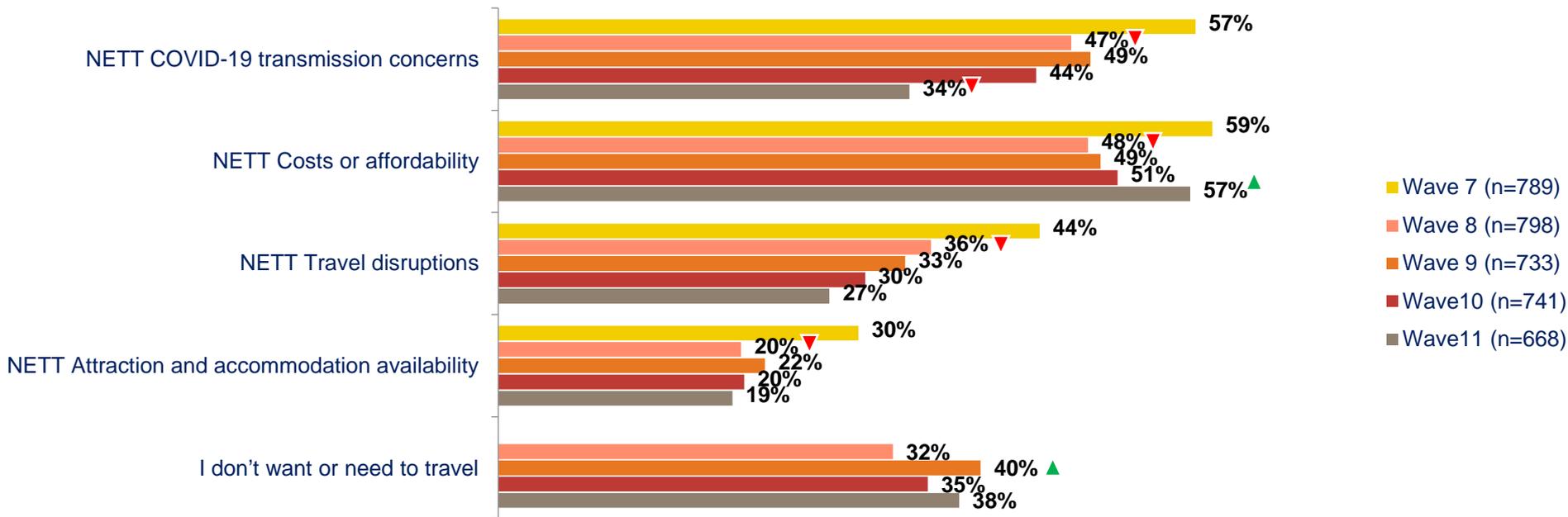
FDT3b. What are the main reasons that you intend to travel more?

Base: all adults 15+ in New Zealand intending to travel more



Cost and affordability has jumped as a theme for travelling less during the first week of level 1, with concerns about COVID-19 significantly decreasing

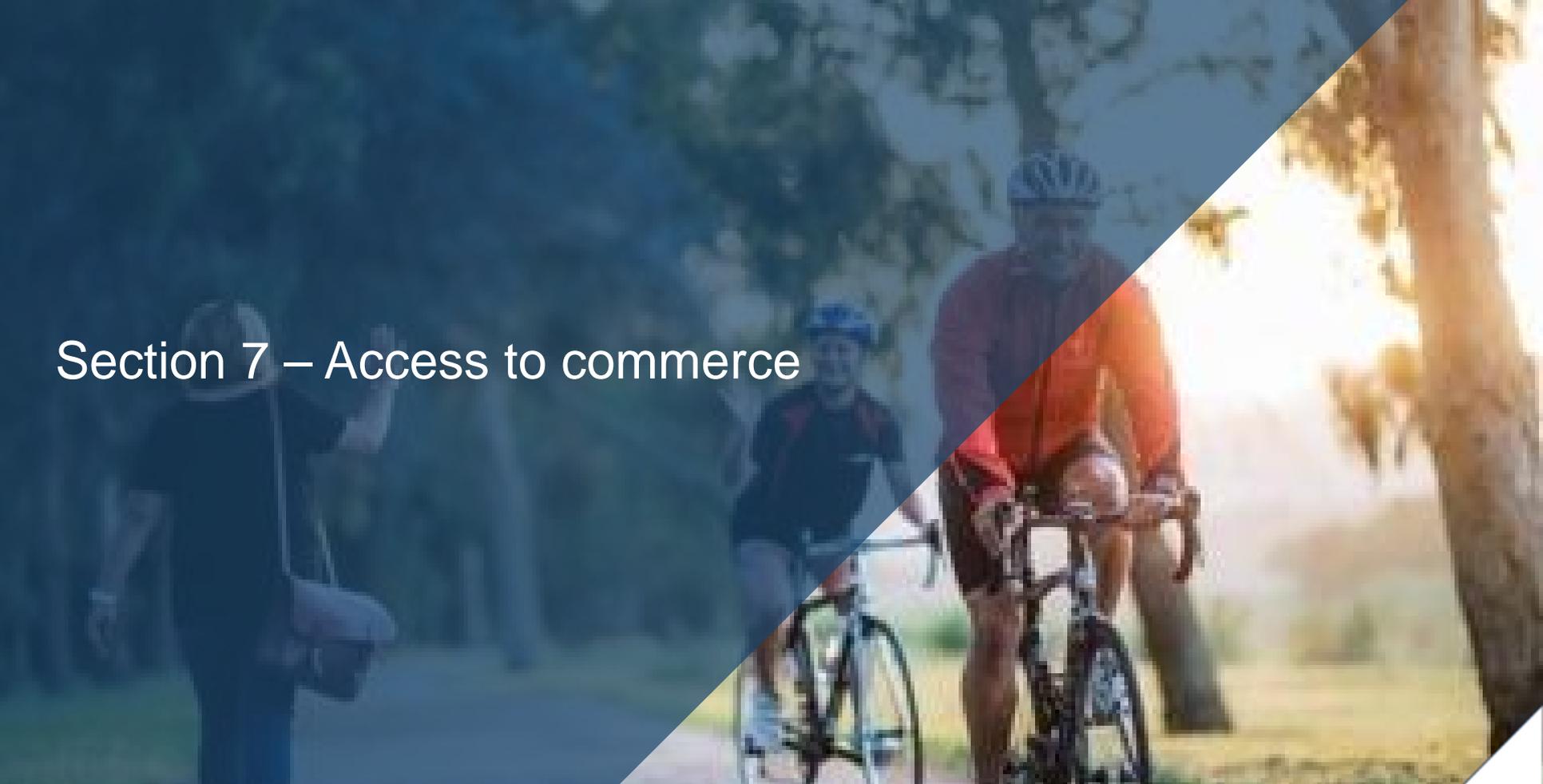
Reasons for travelling less



FDT3a. What are the main reasons that you intend to travel less?

Base: all adults 15+ in New Zealand intending to travel less





Section 7 – Access to commerce

Key findings – access to commerce

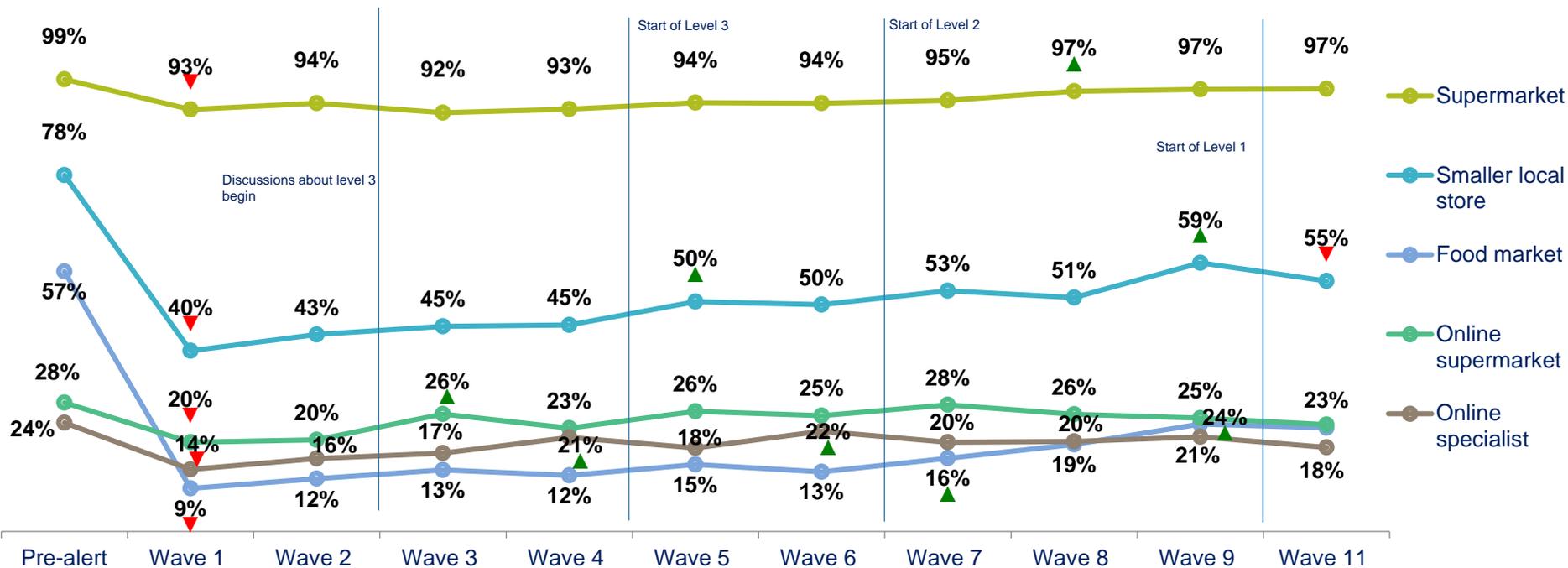
Waka Kotahi objective – changes to travel

- In order to understand the potential long term effects of changing travel behaviour we want to understand the ways in which New Zealanders are adapting to their circumstances and accessing the things they need and want.
- In terms of the proportions of the population participating in online grocery shopping, lockdown does not appear to have resulted in a statistically significant shift towards this shopping channel.
- There was a brief peak in non-grocery online shopping at the start of level 2, but this has trended downwards in the weeks following.



The proportion reporting weekly online grocery shopping during lockdown has not varied significantly

Normal week and most recent week shopping trips taken by survey wave



QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days?

Base: all adults who ever grocery shop in New Zealand



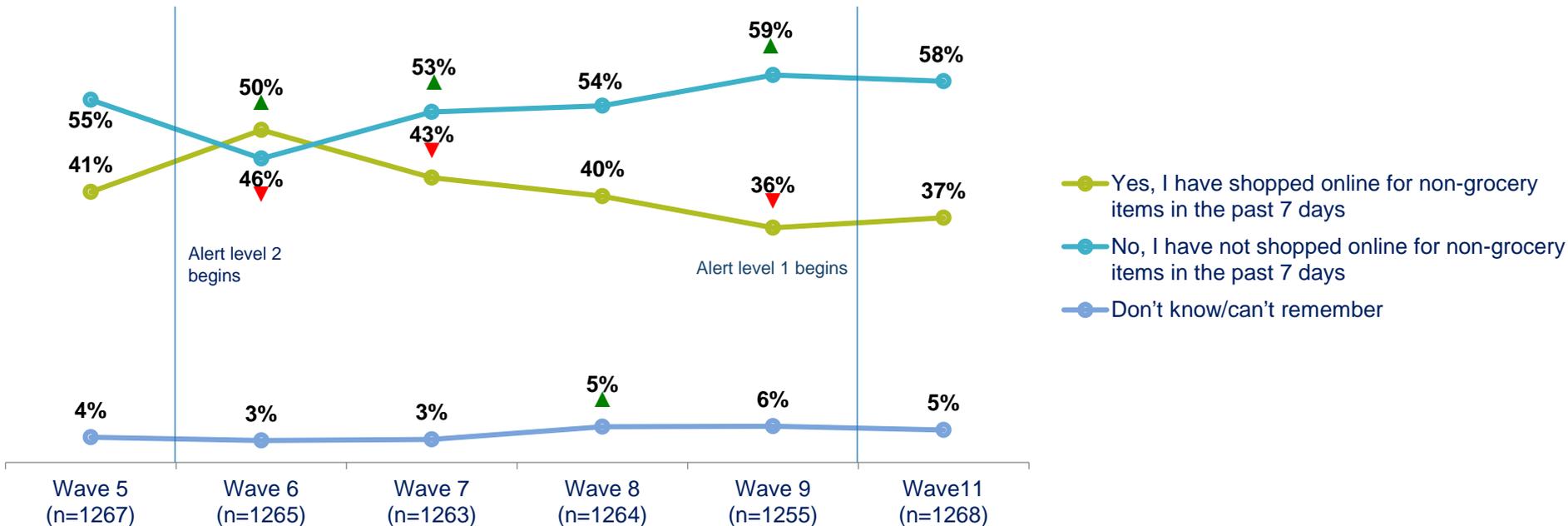
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

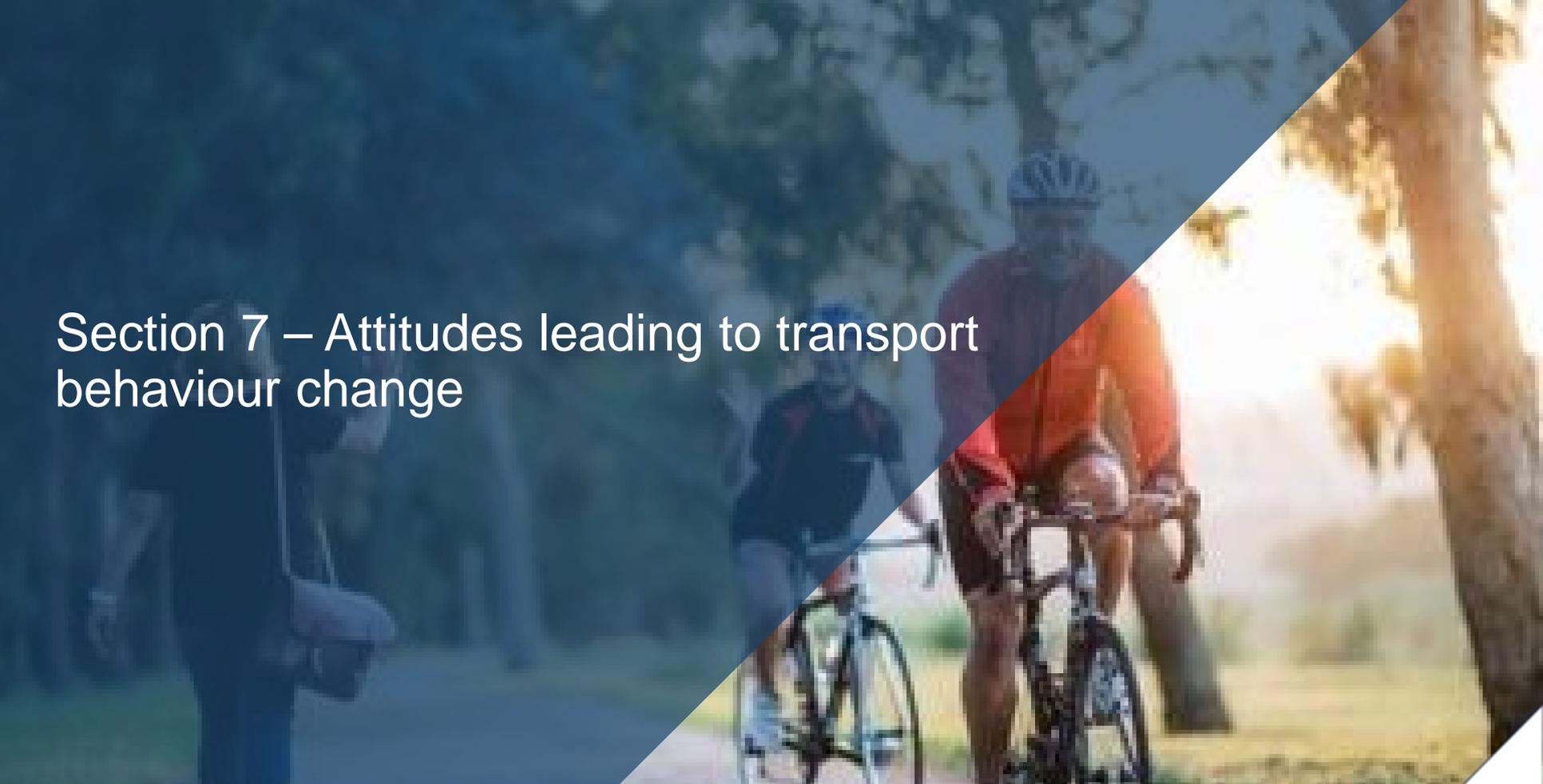
At the start of level 2, more than half reported shopping online for non-grocery items, but this has dropped to just over a third at the start of level 1

Relative difficulty of shopping in past week by survey wave



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





Section 7 – Attitudes leading to transport behaviour change

We use an holistic model of understanding how to influence behaviour change

COVID-19 tracker MAPPS questions

MAPPS DIMENSION	MAPPS CATEGORY	WHAT IT MEANS	STATEMENT IN QUESTIONNAIRE
Motivation	Outcome expectations	I don't think it will work	Making changes to the way we get around will reduce the impact of COVID-19 on New Zealand
	Internalisation	I don't want to do it	I am personally very committed to following current travel/movement restrictions
	Self-efficacy	I don't feel able to do it	I don't feel able to get where I need to go
	Identity	I'm not that kind of person	I am not the type of person who would take a trip that is discouraged under the current alert level
	Emotion	I do not feel like doing it	Leaving the house worries me I worry about how I'm going to get the things I need
Ability	Capability	I am not able to do it	At the moment it's very hard to work out how to get to the places I need to go
	Routines	It's not part of what I usually do	I feel confident I know what travel restrictions are in place when it comes to leaving the house My daily travel routines are disrupted at the moment I travel very differently in the winter to the way I do in the summer
Processing	Decision forces	How things are processed	I trust my own judgement when it comes to deciding when I go out and where I go
Physical	Structural factors	How things are set up	I can easily get to the places I need to go
Social	Cultural norms	The way we live	New Zealanders are looking out for each other by following current restrictions on travel/movement
	Social norms	The kind of thing expected of us	Most people are following the guidance around what journeys they can take

Key findings – attitudes

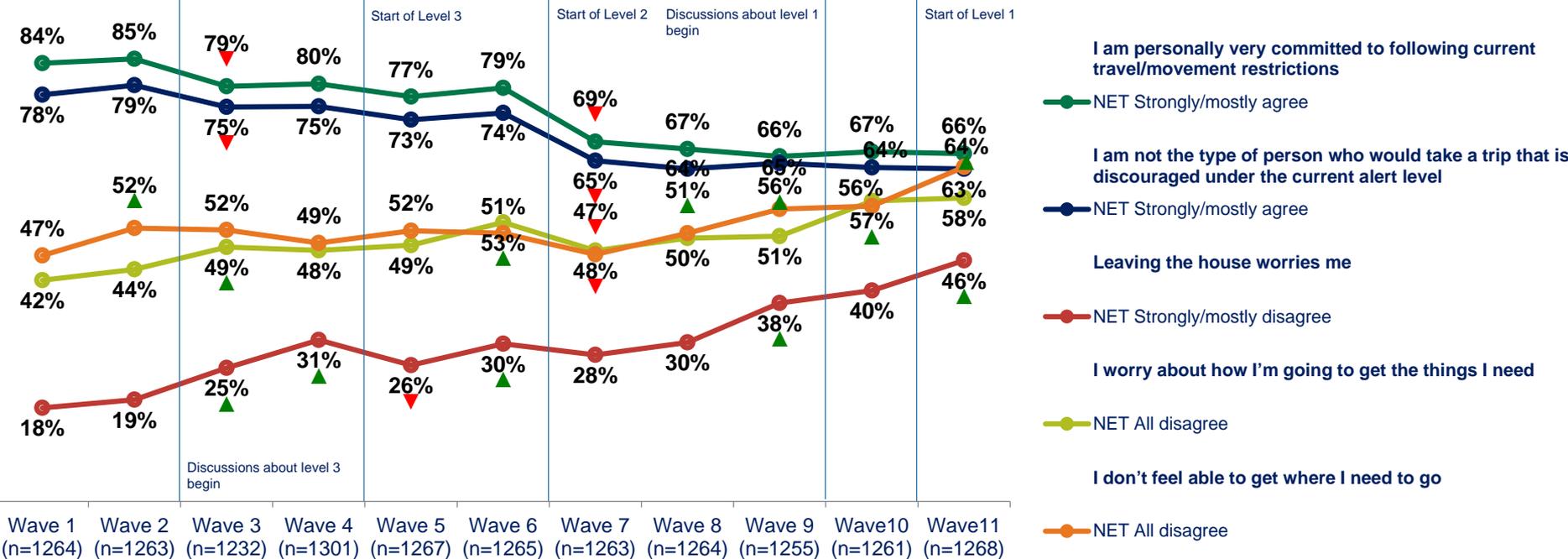
Waka Kotahi objective – understanding behaviour change

- This research has shown that more journeys are being taken as we adjust to level 1 conditions, so it is important to understand the prevalence of certain attitudes in this environment and how those might drive behaviour.
- The negative motivations are evaporating, while buy-in remains stable as restrictions demand less of New Zealanders.
- Feelings around ability are becoming more positive in level 1, with fewer people struggling to work out how to get where they need to go.
- From a physical perspective, the highest proportion recorded so far are saying that it is easy to get where they need to.
- For the first time, an ability factor was introduced to measure the impact of weather and seasonality on travel behaviour.
- Almost half agree that they change their travel patterns in the winter, however this doesn't appear to be a point of differentiation between many groups, with different mode users and those with disabilities agreeing at around the same rate.
- There is some regional variation in levels of agreement which could be tied to different experiences of winter conditions, or of transportation infrastructure across the year.



Negative motivations such as fears of leaving the house or worrying about getting to needed places are decreasing, with no further drop off in commitment

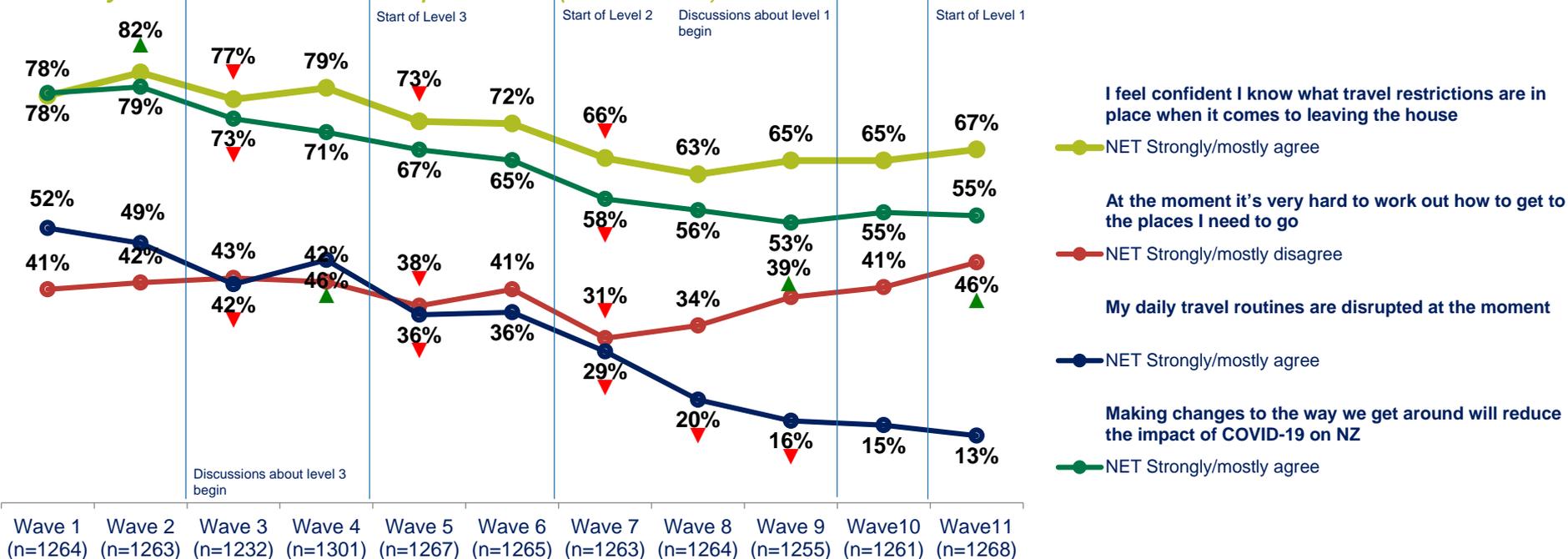
Motivation factors



QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand

Very few people agree that they're experiencing disruption and there is no change in confidence around restrictions, with fewer struggling to work out how to get around

Ability factors + outcome expectation (motivation)

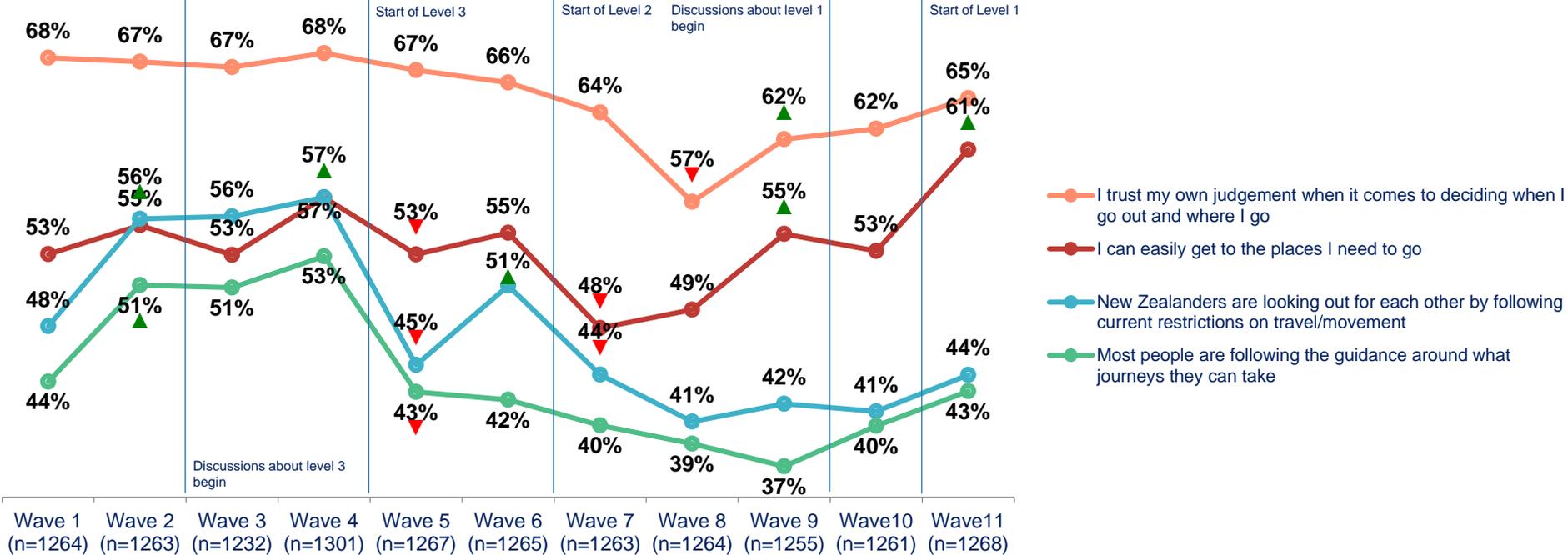


QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand



There has been a statistically significant jump in those who can easily get around, with three in five saying so, while social buy-in is trending back upwards

Processing, physical and social factors (NETT strongly / mostly agree)

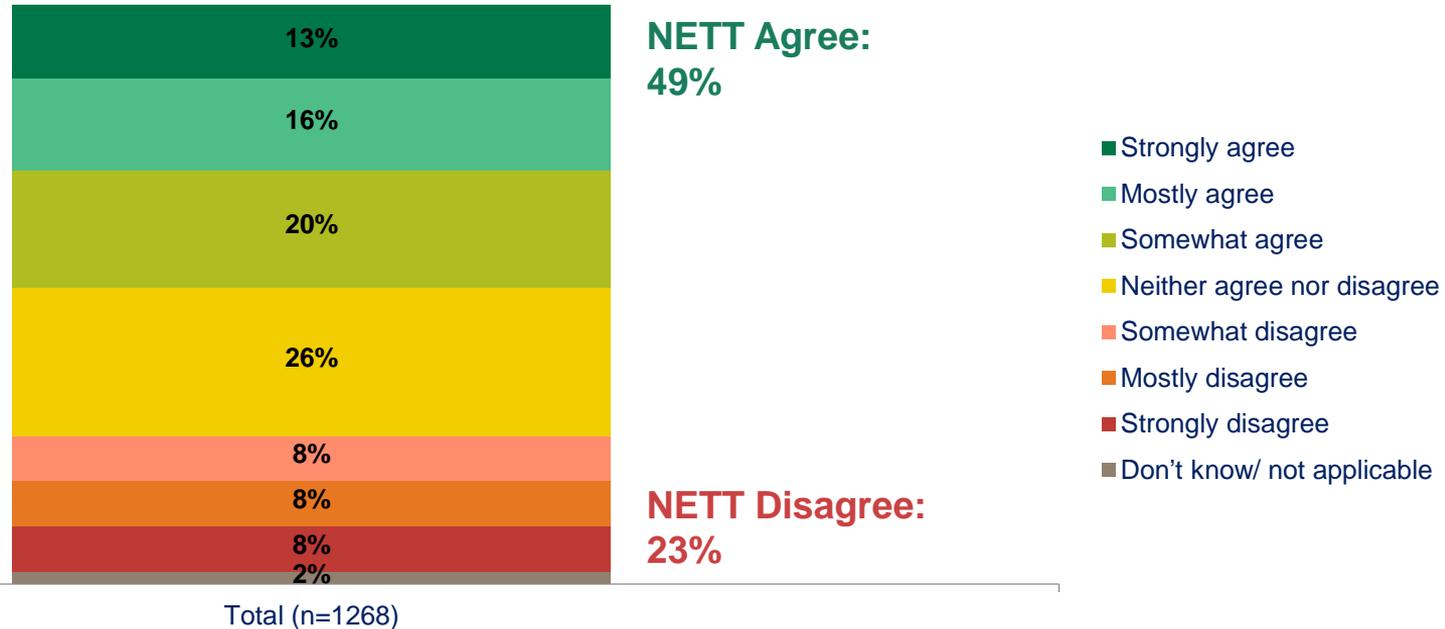


QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand

Almost half agree that they change their travel behaviours seasonally

I travel very differently in the winter to the way I do in the summer

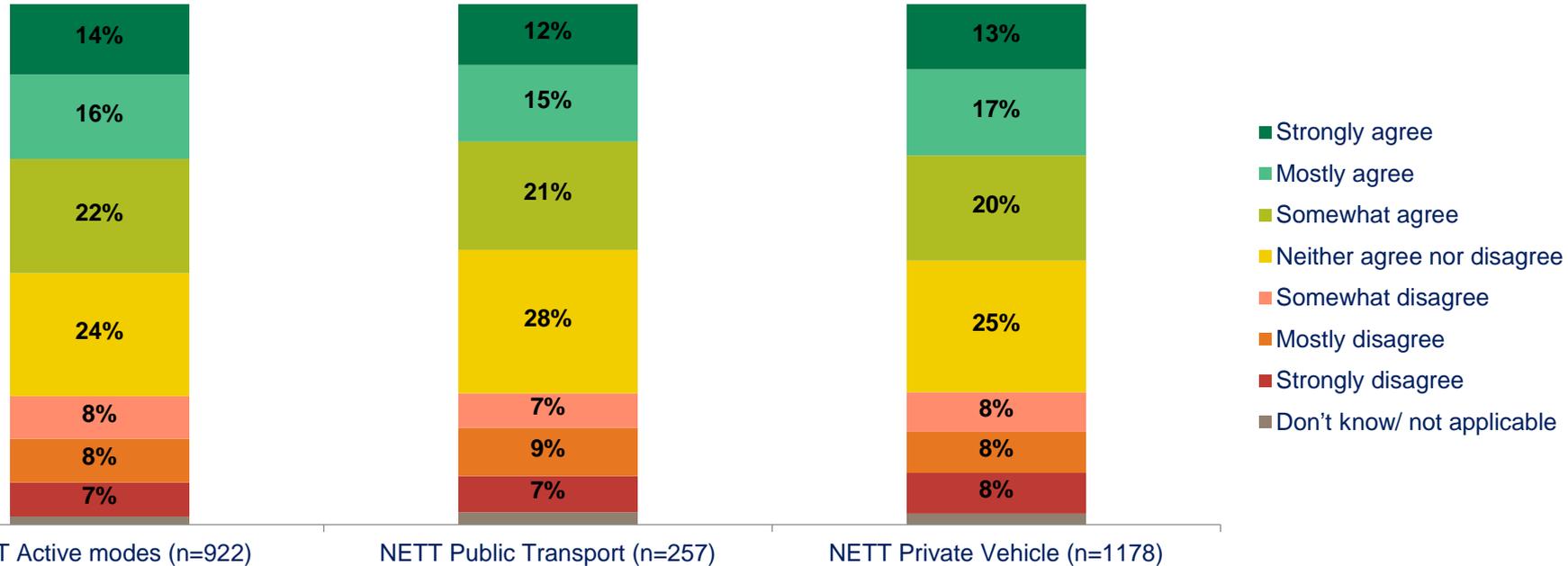


QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand in wave 11

The transport modes that people normally use don't appear to have a significant bearing on a propensity to change travel behaviours seasonally

'I travel very differently in the winter to the way I do in the summer' by normal mode usage

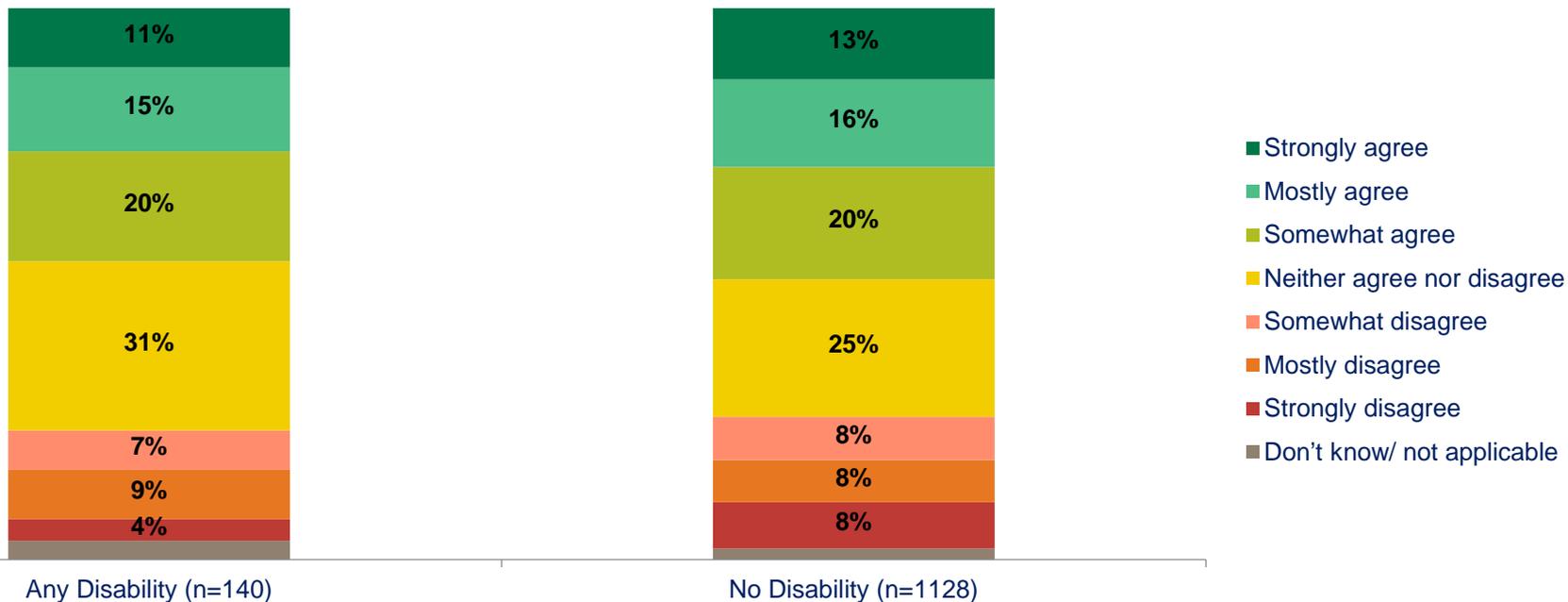


QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand normally travelling by each mode

Disability does not appear to have an impact on this seasonal changeability either

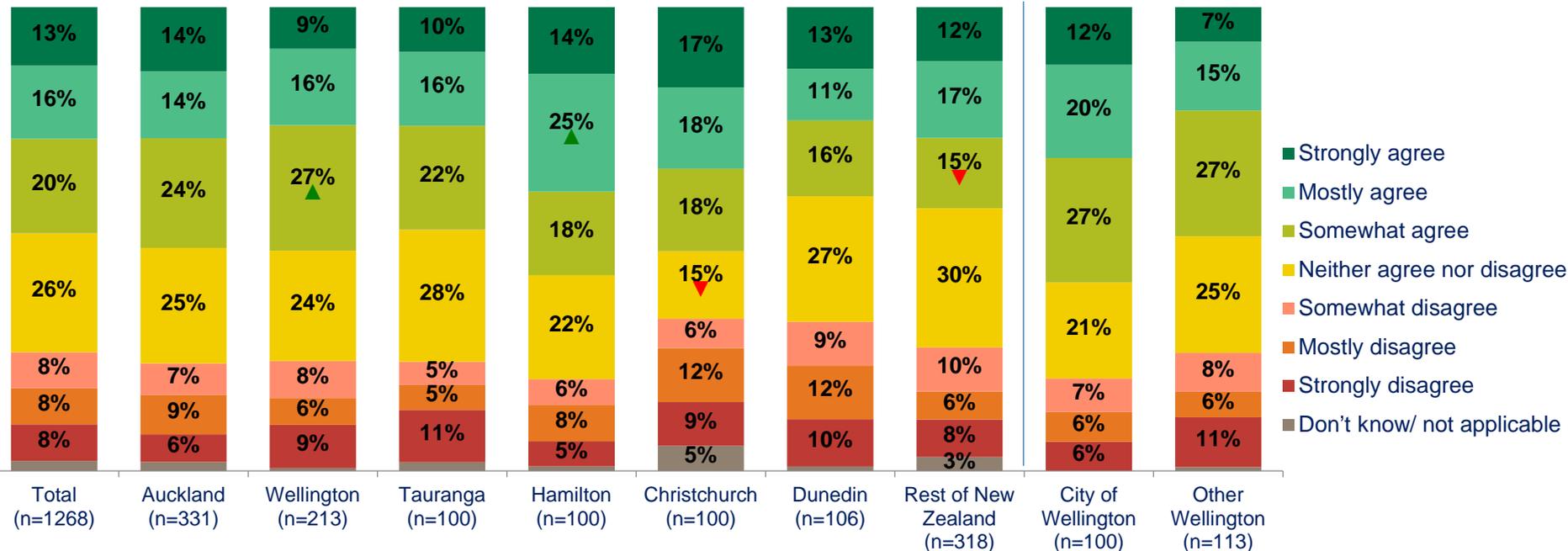
I travel very differently in the winter to the way I do in the summer



QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
Base: all adults 15+ in New Zealand

Those in Hamilton and Wellington are most likely to agree they change their travel patterns, with those in Dunedin and the rest of New Zealand least likely

I travel very differently in the winter to the way I do in the summer



QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand

