



# Waka Kotahi COVID-19 transport impact

Fieldwork waves 1-27 core report

18 March 2022

# 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](mailto:NZTAresearch@nzta.govt.nz).

# Report content

## COVID-19 transport impact

- Section 1 – About this research
  - Overview & technical notes
- Section 2 – Waka Kotahi transport key findings summary
- Section 3 – Context
- Section 4 – Behaviours
- Section 5 – Journeys and Mode Usage
- Section 6 – Public Transport
- Section 7 – Working from home
- Section 8 – Impact of Omicron on schools
- Section 9 – Wellington



# Section 1 – About this research

# Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

# Overview of research (i)

## Research design and outputs

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

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

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

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

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

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

1) Regular\* overview power point report

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

2) [Open Data tables](#)

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

\*For waves 1-14 fieldwork and reporting was undertaken weekly, for waves 15 and 16 fieldwork and reporting was undertaken bi-weekly, while wave 17 fieldwork and reporting was undertaken 3 weeks after wave 16 as fieldwork was brought forward from an intended monthly cycle due to an outbreak of COVID-19 community cases. Waves 17, 18, 19, 20 and 21 are weekly. Wave 22 took place 3 weeks after wave 21. Waves 23, 24, 25, 26 and 27 have occurred on an ad hoc basis.



# Overview of research (ii)

## Question topics in the survey

### Question areas covered in the research:

#### Level of personal concern of the impact of COVID-19

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

#### Current essential journeys and domestic travel undertaken and changes

- change is measured since February 2020.

#### Modal shift patterns and perceptual shifts

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

#### Measuring attitudinal shifts towards COVID-19

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

#### Questions to classify into a variety of segments of interest

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

#### Ad hoc questions of interest

- including perceptions of future workplace flexibility, domestic tourism intentions, intention to return children to school, mask ownership, etc.

# Report notes (i)

## Key information to note for this report

- This report is based on 27 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 27 report is based on a statistically significant shift of results between waves 1 to 27, 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.

\*Please note: During the fieldwork period, on 7 March AKL dropped to alert level 2 and the rest of New Zealand moved to alert level 1.  
 \*\*Please note: Northland was also under level 4 for much of the week preceding fieldwork, dropping to level 3 at midnight on day of launch.

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	
8	Thursday 21 May to Sunday 24 May	Alert level 2
9	Thursday 28 May to Monday 1 June	
10	Thursday 4 June to Sunday 7 June	
11	Thursday 11 June to Sunday 14 June	
12	Thursday 18 June to Sunday 21 June	Alert level 1
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	
18	Thursday 27 August to Sunday 30 August	
19	Thursday 3 September to Sunday 6 September	Alert level 3 (AKL) Alert level 2 (Rest of NZ)
20	Thursday 17 September to Sunday 20 September	
21	Thursday 24 <sup>th</sup> September to Sunday 27 September	Alert level 2 (AKL) Alert level 1 (Rest of NZ)
22	Thursday 15 <sup>th</sup> October to Sunday 18 <sup>th</sup> October	
23	Thursday 12 <sup>th</sup> November to Sunday 15 <sup>th</sup> November	Alert level 1
24	Thursday 4 <sup>th</sup> March to Monday 8 <sup>th</sup> March*	Alert level 3 (AKL) Alert level 2 (Rest of NZ)
25	Thursday 20 <sup>th</sup> May to Monday 24 <sup>th</sup> May	
26	Thursday 2 <sup>nd</sup> September to Monday 6 <sup>th</sup> September**	Alert level 4 (AKL) Alert level 3 (Rest of NZ)
27	Thursday 10 <sup>th</sup> March to Monday 14 <sup>th</sup> March	



# 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.

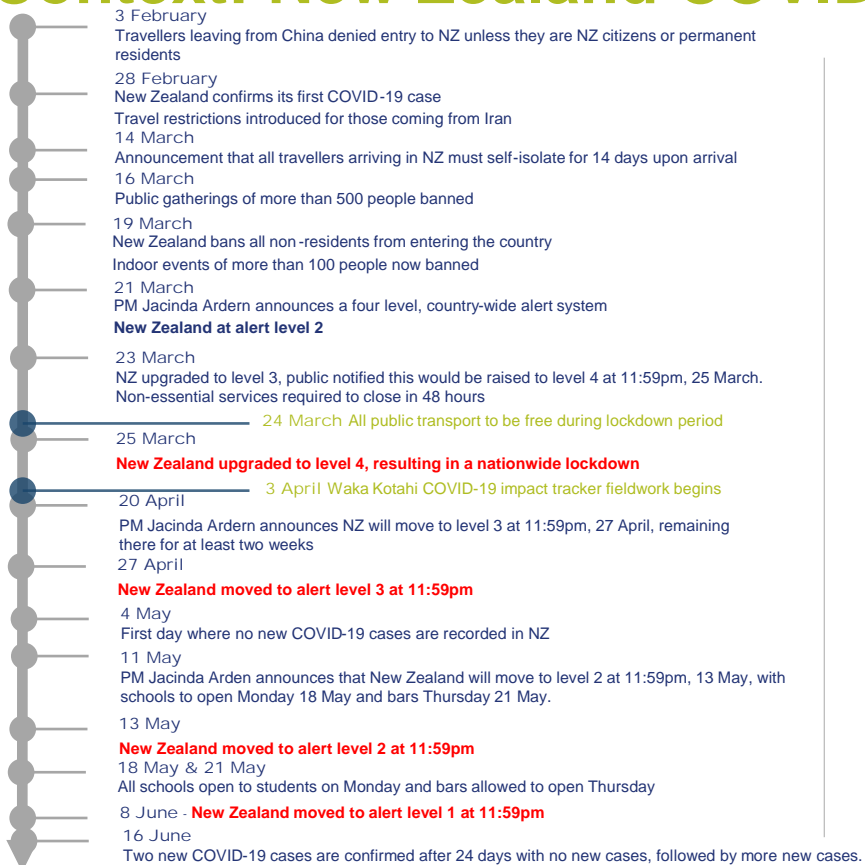
# Sample structure and further definitions

Wave		Display variable	Total	Region of residence						Disability, Vulnerability and COVID-19**			
				Auckland	Tauranga	Hamilton	Wellington	Christchurch	Dunedin	Rest of NZ	Any Disability	COVID-19 Vulnerable	Aged 70 + years
				All in Auckland Region, including city and surrounding rural areas	All living in the city of Tauranga	All living in the city of Hamilton	All in Wellington Region, including city and surrounding rural areas	All living in the city of Christchurch	All living in the city of Dunedin	All living in areas outside of those noted above	See previous page	See previous page	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over
Waves 1-4	Sample	n= 5,060	n=1,324	n=400	n=400	n=684	n=400	n=398	n=1,454	n=550	n=1,230	n=618	
	MoE*	1.38	2.69	4.9	4.9	3.75	4.9	4.91	2.57	4.18	2.79	3.94	
Waves 5-6	Sample	n=2,532	n=662	n=200	n=200	n=418	n=200	n=200	n=652	n=297	n=597	n=315	
	MoE*	1.95	3.81	6.93	6.93	4.79	6.93	6.93	3.84	5.69	4.01	5.52	
Waves 7-10	Sample	n= 5,043	n=1,324	n=400	n=400	n=799	n=400	n=392	n=1,328	n=611	n=1,139	n=627	
	MoE*	1.38	2.69	4.9	4.9	3.47	4.9	4.95	2.69	3.96	2.9	3.91	
Waves 11-16	Sample	n= 7,561	n=1,964	n=599	n=600	n=1,129	n=601	n=607	n=2,061	n=866	n=1,640	n=830	
	MoE*	1.13	2.21	4	4	2.92	4	3.98	2.16	3.33	2.42	3.4	
Waves 17-18	Sample	n= 2,455	n=661	n=200	n=200	n=311	n=200	n=200	n=683	n=284	n=584	n=266	
	MOE*	1.98	3.81	6.93	6.93	5.56	6.93	6.93	3.75	5.82	4.06	6.01	
Waves 19-20	Sample	n= 2,626	n=676	n=197	n=217	n=357	n=200	n=208	n=771	n=323	n=617	n=293	
	MOE*	1.91	3.77	6.98	6.65	5.19	6.93	6.79	3.53	5.45	3.95	5.73	
Wave 21	Sample	n= 1,253	n=331	n=100	n=100	n=175	n=100	n=87	n=360	n=132	n=317	n=162	
	MOE*	2.77	5.39	9.8	9.8	7.41	9.8	10.51	5.16	8.53	5.17	7.7	
Wave 22	Sample	n=1,220	n=331	n=97	n=101	n=156	n=100	n=93	n=342	n=130	n=299	n=131	
	MOE*	2.81	5.39	9.95	9.75	7.85	9.8	10.16	5.3	8.6	5.67	8.56	
Wave 23	Sample	n=1,247	n=331	n=86	n=100	n=165	n=100	n=100	n=365	n=142	n=305	n=141	
	MOE*	2.77	5.39	10.57	9.8	7.63	9.8	9.8	5.13	8.22	5.61	8.25	
Wave 24	Sample	n=1,232	n=331	n=67	n=100	n=161	n=100	n=100	n=373	n=142	n=297	n=160	
	MOE*	2.79	5.39	11.97	9.8	7.72	9.8	9.8	5.07	8.22	5.69	7.75	
Wave 25	Sample	n=1,259	n=331	n=100	n=100	n=194	n=100	n=100	n=334	n=187	n=311	n=133	
	MOE*	2.76	5.56	9.8	9.8	7.04	9.8	9.8	5.36	7.17	5.56	8.5	
Wave 26	Sample	n=1,261	n=331	n=100	n=100	n=164	n=100	n=100	n=336	n=133	n=324	n=159	
	MOE*	2.76	5.39	9.8	9.8	7.65	9.8	9.8	9.8	8.5	5.44	7.77	
Wave 27	Sample	n=1,181	n=331	n=68	n=95	n=117	n=100	n=95	n=375	n=140	n=299	n=144	
	MOE*	2.85	5.39	11.88	10.05	9.06	9.8	10.05	5.06	8.28	5.67	8.17	

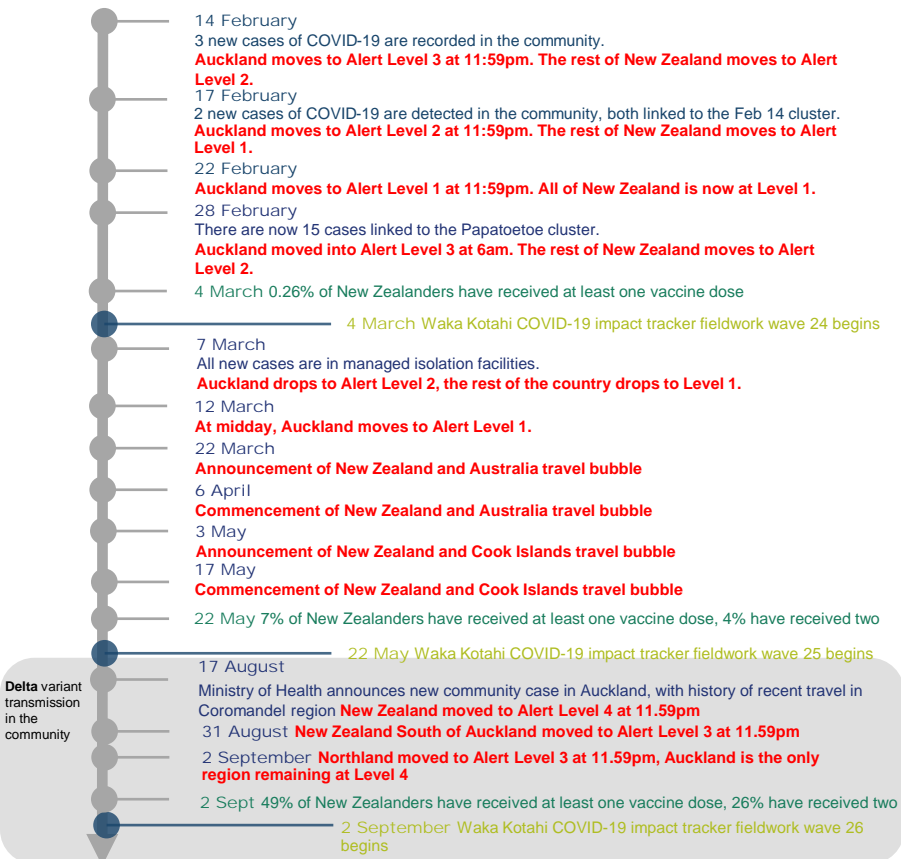
\*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 April 12:44pm.

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

# Context: New Zealand COVID-19 timeline - 2020



# Context: New Zealand COVID-19 timeline – 2021



# Context: New Zealand COVID-19 timeline – 2021/22

Delta variant transmission in the community

2 December

From 11.59pm on 2 December 2021, New Zealand moves to the COVID-19 Protection Framework, also known as the traffic light system. **The South Island and parts of the North Island are at orange. Auckland, Northland, and areas from Whanganui and Rangitikei to East Cape in red.**

13 December

From 11.59pm on 30 December, Auckland and most of the other regions currently in red move to orange.

**South Island remains orange and Northland remains at red.**

16 December

First case of Omicron reported in New Zealand, in managed isolation in Christchurch.

21 December

Government announces that phased border reopening will be delayed until the end of February.

## 2022

17 January

Over 18's can book a booster vaccine shot four months after their second vaccine. The Pfizer vaccine is available to children aged 5-11 years at 500 vaccination sites

17 January Vaccination rate of eligible people reaches 95% first dose, 93% second dose

18 January

First case of community transmission of Omicron in New Zealand,

20 January

Covid-19 Protection Framework Level change: From 11.59pm., Northland currently at red joins the rest of New Zealand at orange. **440 cases on Omicron and 32 cases of Delta detected at the border since 1 December 2021**

21 January

Due to the infectiousness of Omicron, case isolation temporarily increased to 14 days from 10 days. **The isolation time for close contacts has been increased to 10 days, from seven.**

22 January Of those eligible, 54% have received a booster shot

23 January

COVID-19 Protection Framework level change: From 11.59pm., All of New Zealand goes to red from orange, due to high risk of undetected community spread of Omicron.

3 February

New date announced for border reopening, which will begin on February 27 with fully vaccinated New Zealanders and other eligible visitors returning from Australia.

**From 11.59pm., medical type masks are now mandatory for workers subject to compulsory vaccination and in a public facing role.**

Omicron variant transmission in the community

4 February

The approved time between the second vaccine and the booster reduced for those who are over 18, from four months to three.

24 February

From the 11.59pm., Phase 3 of the Governments plan comes to effect. Only household contacts will be considered contacts, RAT-detected cases will self-notify their result to the official register, those who test positive to notify their own contacts, and rapid antigen tests introduced at Auckland general practices and urgent care clinics.

27 February

From the 11.59pm., borders reopen to vaccinated New Zealanders from Australia. **MIQ is removed with self-isolation and test on arrival.**

28 February

Most travellers entering New Zealand from 28 February 2022 must provide evidence of a negative COVID-19. **Government announces self-isolation requirements to be relaxed for returning New Zealanders.**

1 March Novavax vaccine approved in New Zealand for those 18 and older.

2 March

from 11.59pm, Fully vaccinated New Zealanders and other eligible people entering from Australia are no longer required to isolate. They must return a negative pre-departure test result. They must also return negative RAT results on arrival and on day 5/6; those who are COVID-positive must report the results and self-isolate.

4 March

Borders opened to New Zealanders and other eligible travellers from anywhere in the world and don't have to self-isolate. **51.6% of children aged 5-11 years have had their first dose, 72.2% of people eligible have received a booster.**

9 March

Government announces case and household contact isolation period to reduce to seven days from 10, at 11.59pm on 11 March.

10 March Waka Kotahi COVID-19 impact tracker fieldwork wave 27 begins

11 March

From 11.59pm., case and household contact isolation periods are reduced from 10 to seven days.

Cumulative vaccination data sourced from [health.govt.nz](https://health.govt.nz) on 14.09.2021



## Section 2 – Waka Kotahi transport key findings summary




# Key findings – waves 1-27

## Waka Kotahi COVID-19 transport impact tracker

Wave 27 of fieldwork was the first to take place under the current *traffic light* restrictions system, with the whole of New Zealand under Phase 2 of Red. This is a differing set of restrictions than encountered previously, Omicron is in the community, but vaccinations are common and businesses that wouldn't operate under the previous lockdowns were open with certain restrictions.

- The first impact is concern around COVID risks: the gap between concern about transmitting the virus to others and concern about personally getting infected, has increased to 10 points, although both concerns are up significantly since the Delta lockdowns (August-December of 2021) to the highest rates since the first few weeks of the initial 2020 lockdown.
  - While looser restrictions have resulted in a significant decrease in the proportion feeling their travel routines are disrupted, the level of worry about leaving the house is no lower than it was under Delta.
  - New Zealanders are waiting for a decline in community cases before returning to normal travel patterns particularly with regards to public transport.
- The proportion of New Zealanders restricting their movement severely decreased significantly since the September Delta lockdown, halving by March.
  - Almost all those in self-isolation are doing so for reasons that are COVID-related, with a third isolating due to symptoms, testing or positive cases, and almost as many self-isolating as a preventative measure.
- Frequent essential journeys like work and education recovered significantly, although they are not occurring at the same rates reached when the country was under level 1 restrictions.
  - There was also a significant increase in journeys to support vulnerable friends and family, who may be at greater risk during this time with Omicron widespread in the community.
- A shift in mode usage has occurred since the last outbreak too.
  - Stated weekly public transport usage has doubled to 14%, and while this is below peaks seen when the country was at level 1, it is significantly higher than under Delta restrictions.
  - Active mode travel has significantly decreased since September, but is in line with this time last year, supporting previous evidence that active mode travel is more favoured during movement restricted periods.
- While public transport usage as a whole has increased significantly, this is concentrated in buses. However, usage rates are still a long way short of reported pre-COVID levels (March 2020).
  - The big change in public transport has been the role in transmission concerns in keeping travellers off services, with a significant jump compared to the Delta outbreak in September.
  - Normal public transport users are explicitly stating reduced community cases as their key trigger for returning to services.
- While the proportion mainly working from home is still high compared to a year ago, and unchanged compared to September's Delta-driven lockdown, there are some interesting differences under Omicron. There are indications that the differing restrictions and guidelines are leading to modifications in commuting volume and behaviours.
  - Essentially, the proportion working from home for *the majority* of the week is unchanged from Delta, but with more businesses open, there are more workers commuting on more days of the week.
- Finally, the contribution of the “school run” to daily traffic is complicated and liable to shift further as COVID spreads through more schools.
  - At the time of fieldwork, a quarter of parents had at least one child at a COVID impacted school. However almost all of these also had a child at a school that was not impacted.
  - This may contribute to some mode shift in these trips, with some parents who would normally prefer to drive choosing active modes instead.

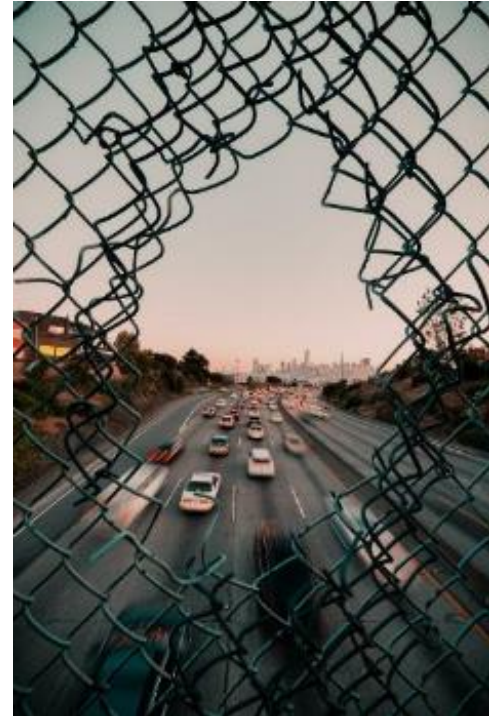


## Section 3 – Context

# Key findings – context

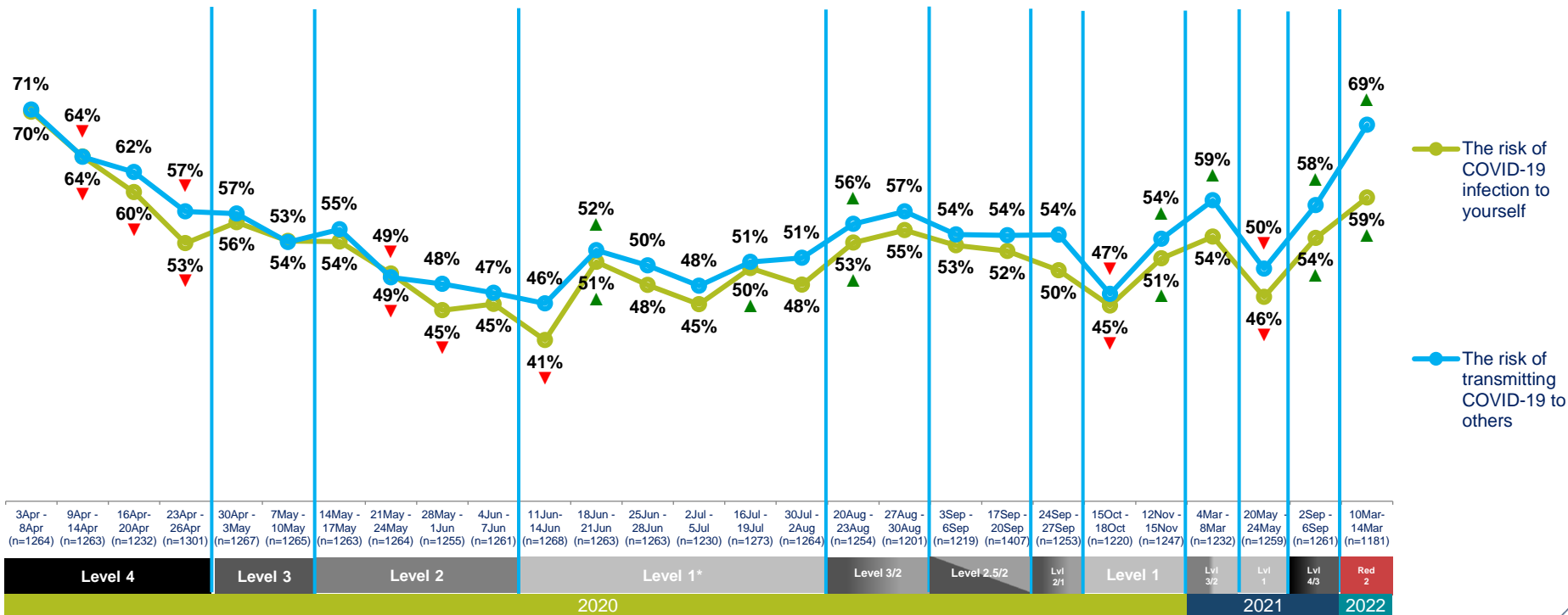
## Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- Understanding attitudes around COVID-19 provides the context in which journey and mode changes can be viewed. General fears and attitudes may work as external factors influencing the choices that New Zealanders make.
- The latest wave of fieldwork was the first to take place under the current *traffic light* restrictions system, with the whole of New Zealand under Phase 2 of the Red Light. This is a differing set of restrictions than encountered previously, Omicron is in the community, but vaccinations are common and businesses that wouldn't operate under the previous lockdowns were open with certain restrictions.
- These factors are likely to make people behave differently, but also to assess the risks inherent with COVID in the community in different ways.
- The first impact is the relative sense of concern around COVID risks, while concern about transmitting the virus to others has always been higher than the concern about personally getting infected, the gap between the two has increased to 10 points, with both concerns up significantly since the Delta lockdown of August-December 2021 and higher than they were at any time, except for the first few weeks of the initial 2020 lockdown.
- Concern about transmission is also greater than concern about potential disruptions to work and leisure from infection and close contacts.
- Economic and financial concerns have also increased significantly, but with other factors in play around inflation and cost of living, it is unlikely that COVID is the primary driver of this.
- While a reduction in restrictions since September has resulted in a significant decrease in the proportion feeling their travel routines are disrupted, the level of worry about leaving the house is not really any lower than it was under Delta.
- All of this leads to a situation where New Zealanders are waiting for a decline in community cases before returning to normal travel patterns particularly with regards to public transport. Nearly a quarter *strongly* agree that they won't use public transport again until community cases are down, with 1-in-5 strongly agreeing that their travel patterns won't return to normal until this goal is achieved.



# Under Omicron, concern about transmission has significantly increased, but for the first time there is a 10-point gap between concern about infection and transmission

COVID-19 concerns (NETT all concerned)



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

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



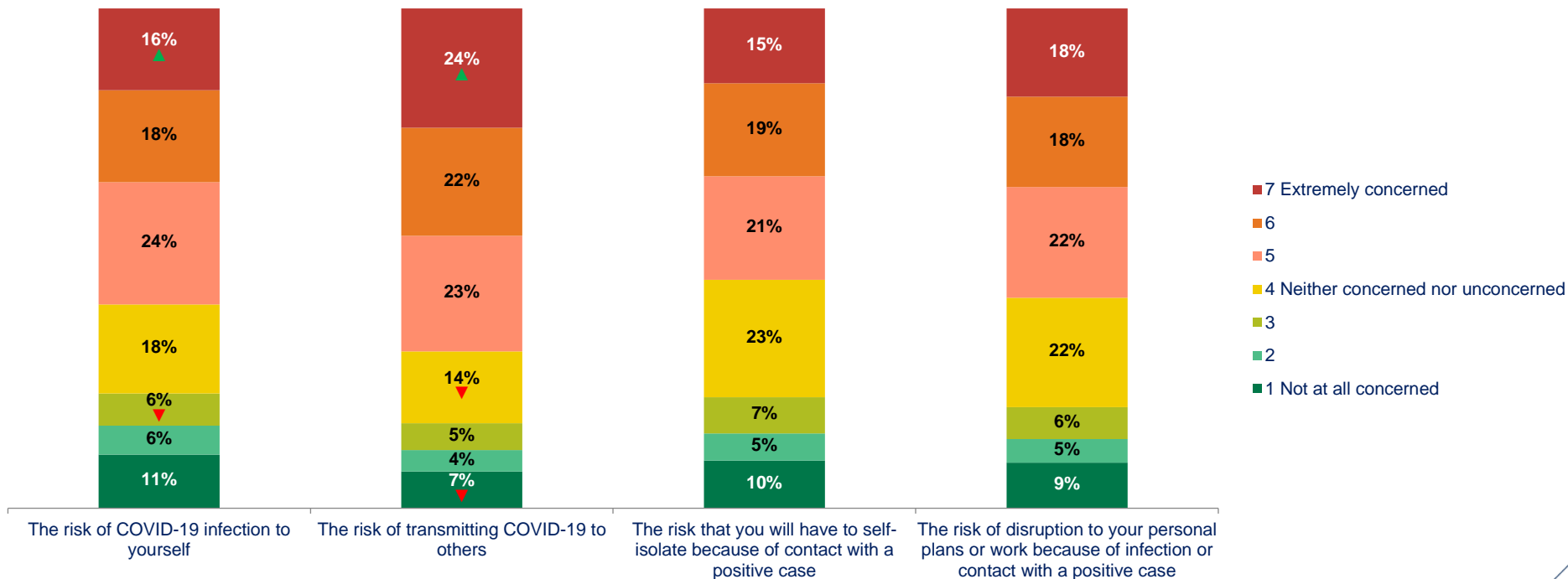
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# The risk of transmitting COVID to others is the greatest stated concern, with worries about disruption roughly equivalent to worries about contracting the virus personally

## COVID-19 infection risk types



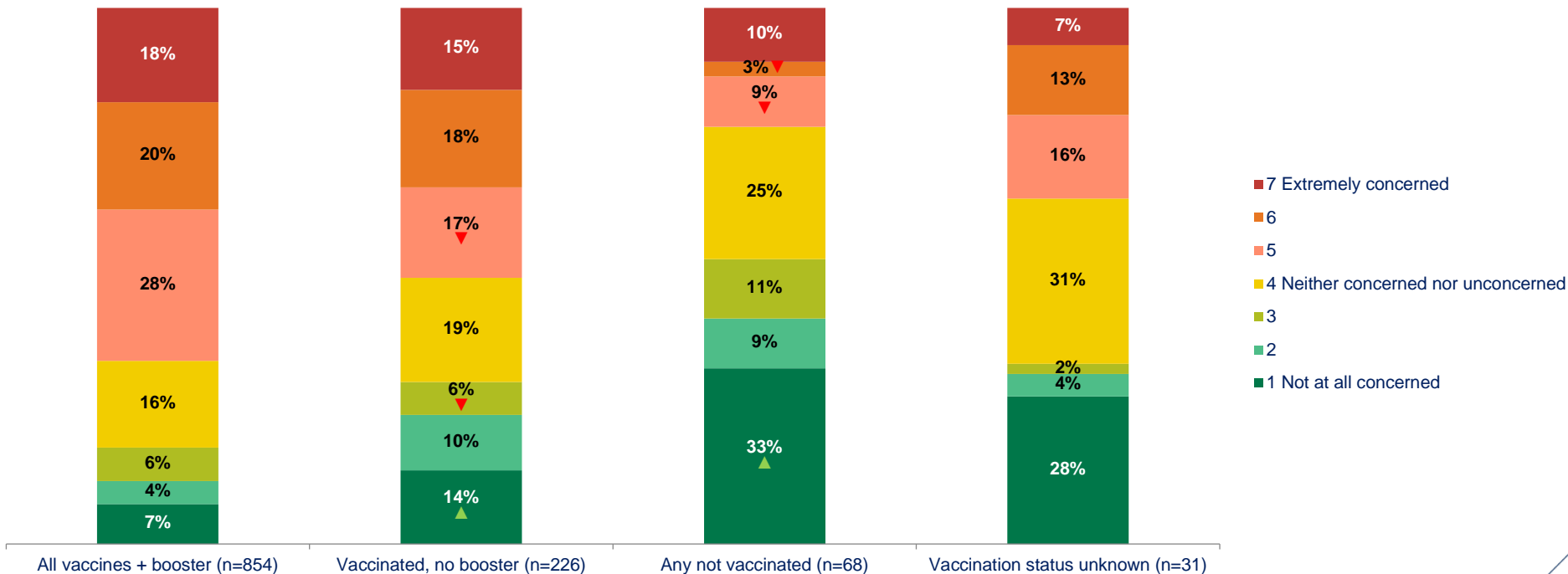
QPTUSE3. How personally concerned are you about each of the following?

Base: all adults 15+ in New Zealand during wave 27, Mar10-Mar14 2022 (n=1,181)



# As observed during the Delta outbreak, concern about personally contracting COVID is generally higher within the vaccinated population

## COVID-19 infection risk by vaccination status



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

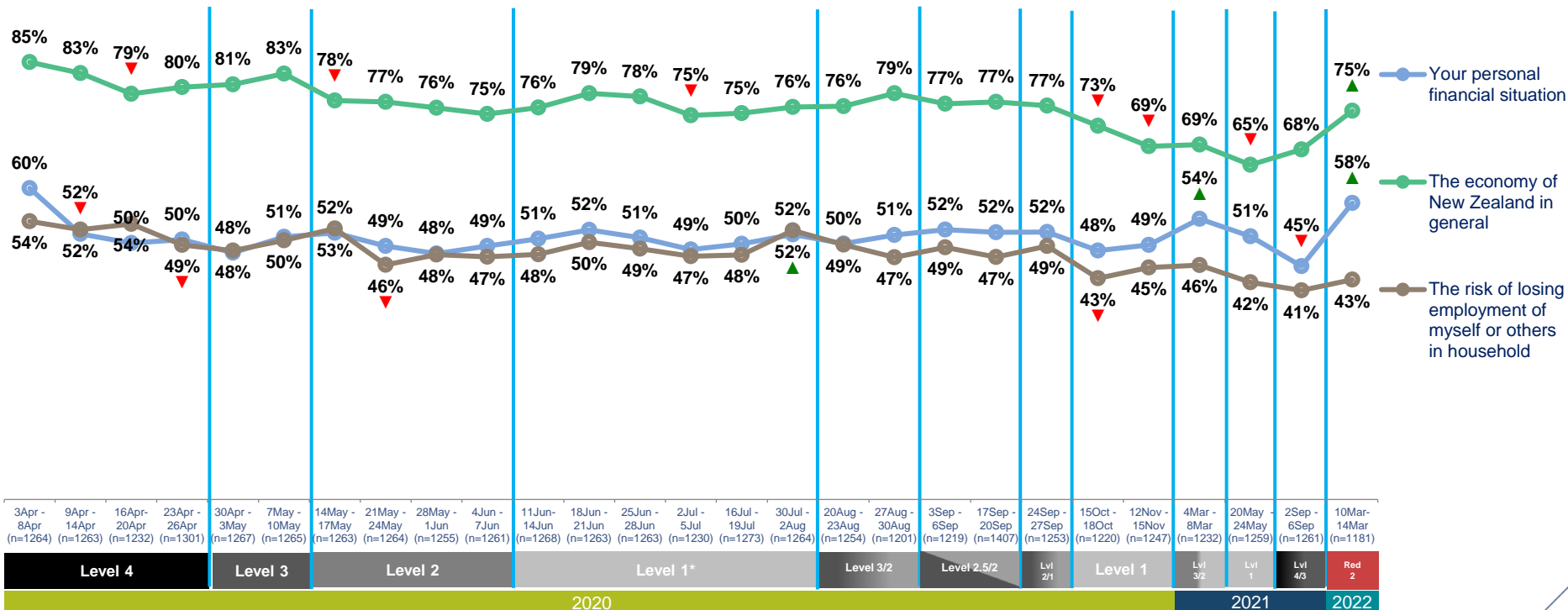
Base: all adults 15+ in New Zealand during wave 27, Mar10-Mar14 2022





# Economic and financial concerns have taken off, with both increasing significantly in March, although with other factors in play, Omicron is unlikely to be the sole cause

## Economic concerns (NETT all concerned)



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

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



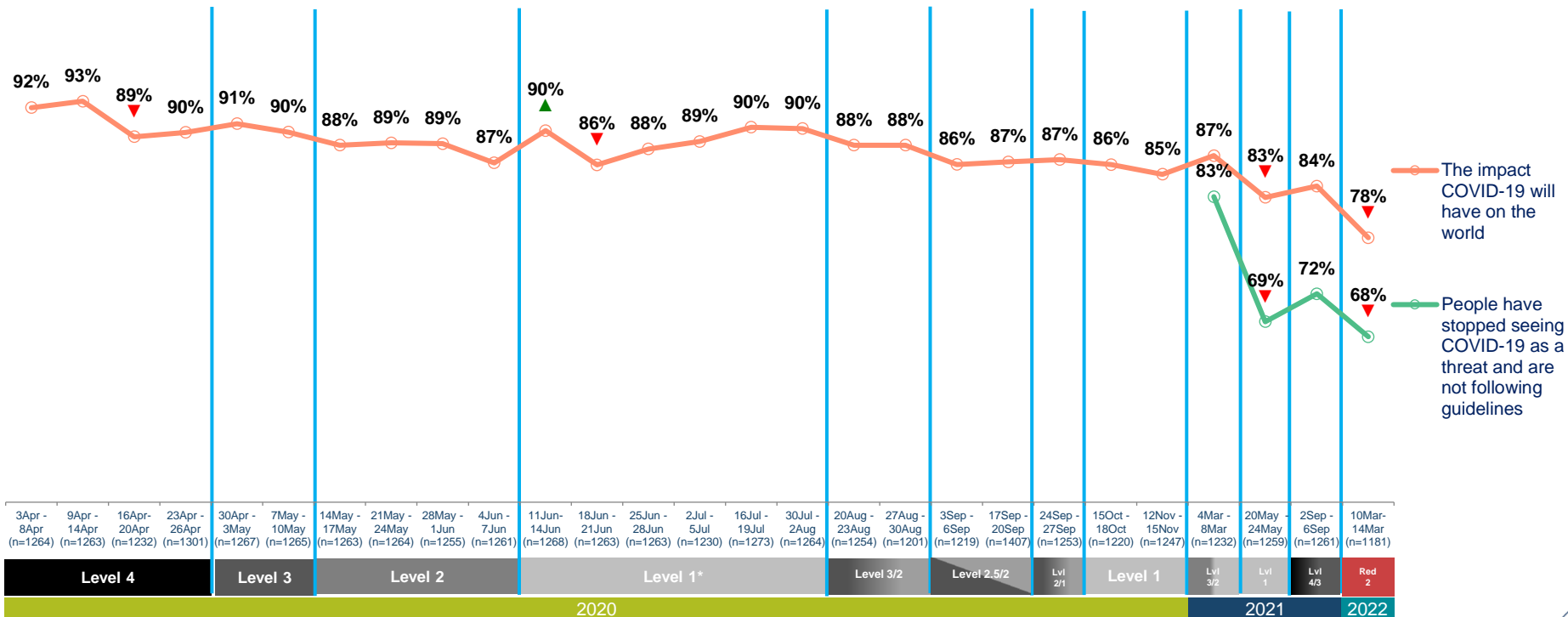
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Some concerns have lessened though, with New Zealanders now less worried than ever about the global impact of COVID or about the behaviour of others

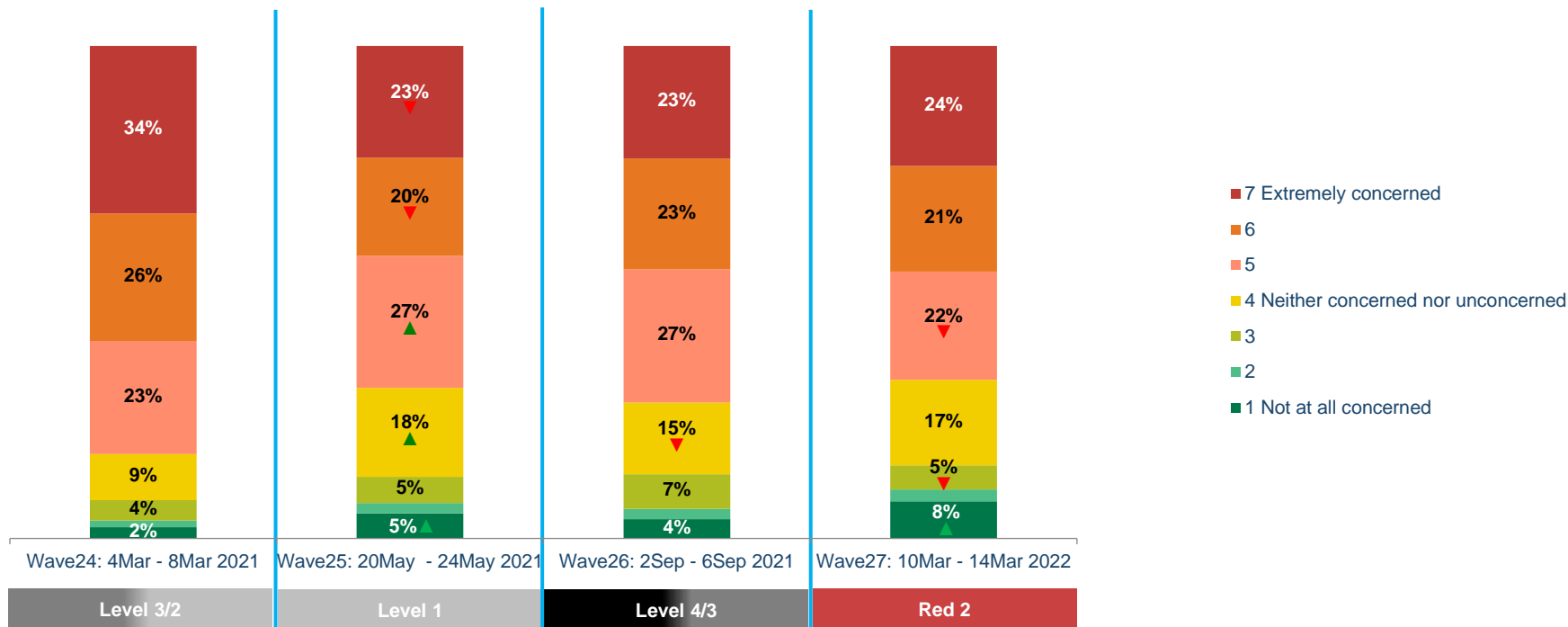
COVID concerns (NETT all concerned)



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

# Concern about complacency in others is still quite high though, with a quarter still extremely concerned about this

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

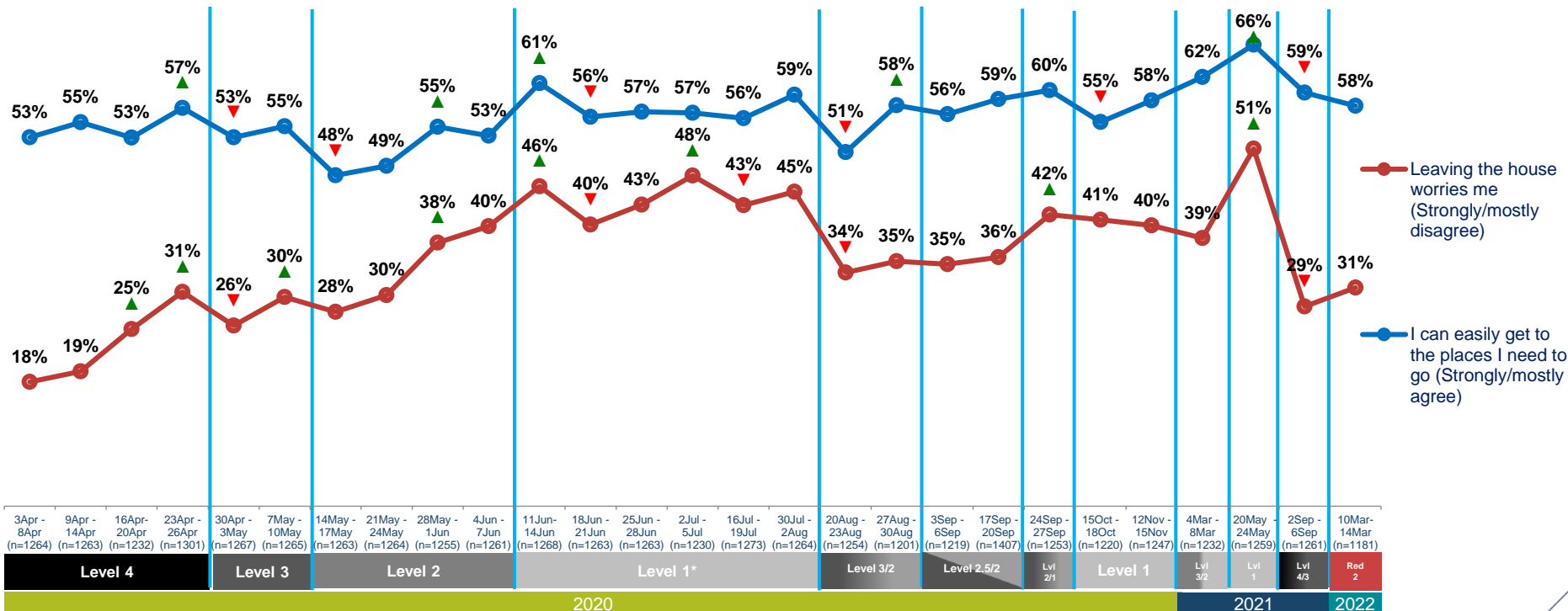


QPTUSE3. How personally concerned are you about each of the following?  
 Base: all adults 15+ in New Zealand during wave 27, Mar10-Mar14 2022



# People are still less confident about getting where they need to and there has been no real increase in those disagreeing that they're worried about going out

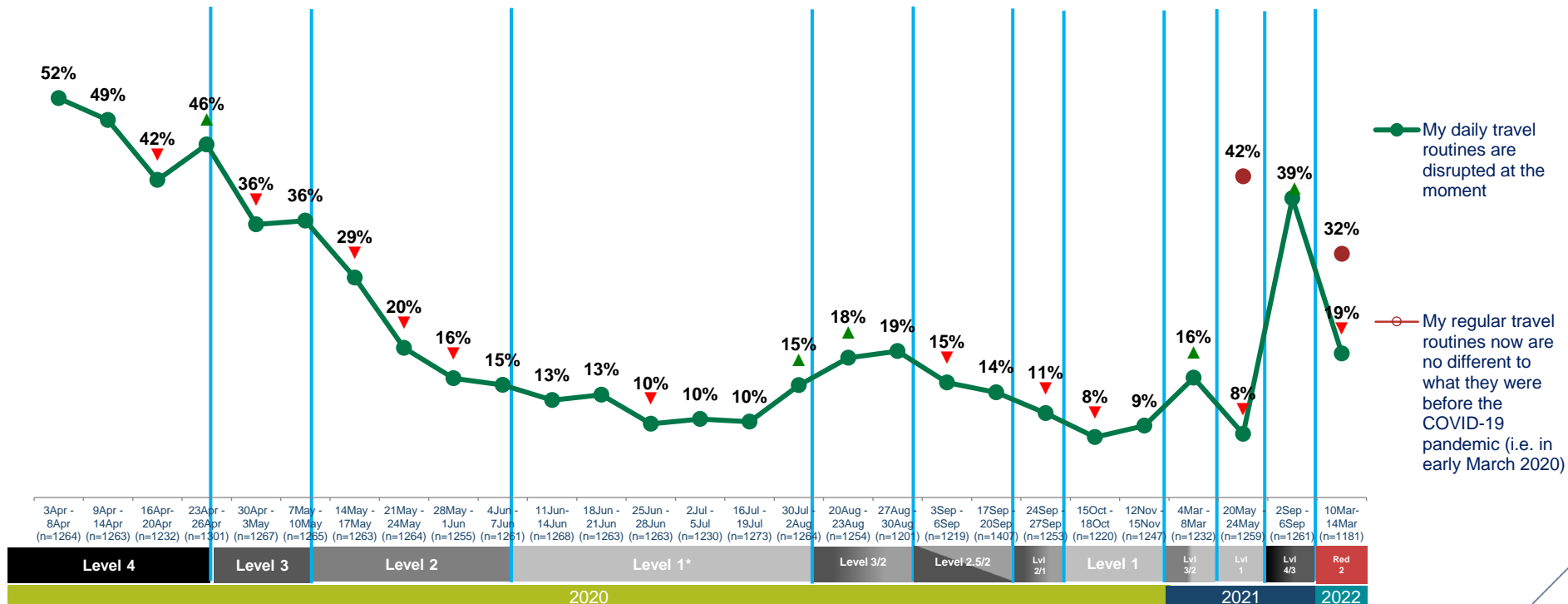
## COVID-19 attitudes



QATT. To what extent do you agree or disagree with the following statements?  
 Base: all adults 15+ in New Zealand \*fieldwork frequency decreased from weekly during level 1

# While the proportion feeling disrupted in their routines is significantly down from September, it's still higher than in level 1 and only a third travel as they did pre-COVID

COVID-19 disruption (all strongly/mainly agree)



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

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



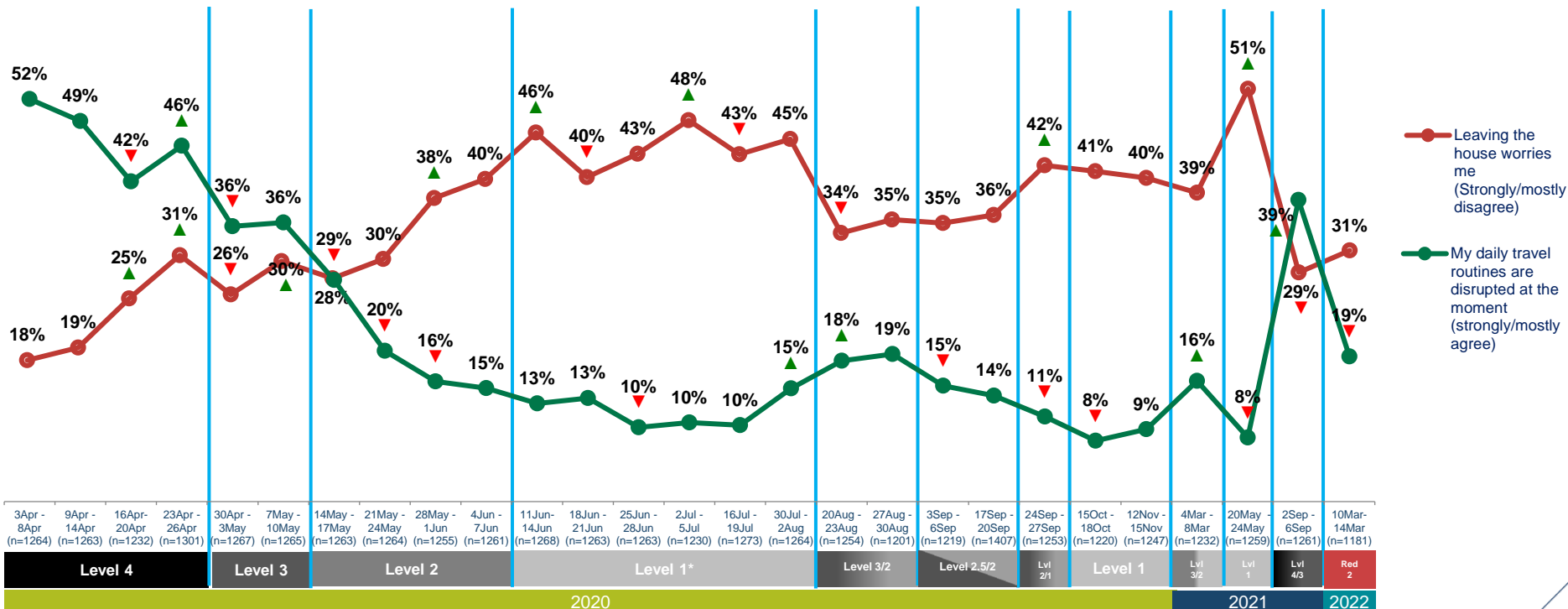
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# People are no more confident about leaving the house than in September, but while 2-in-5 agree that their travel routines are disrupted, it has significantly decreased

## COVID-19 disruption and leaving the house

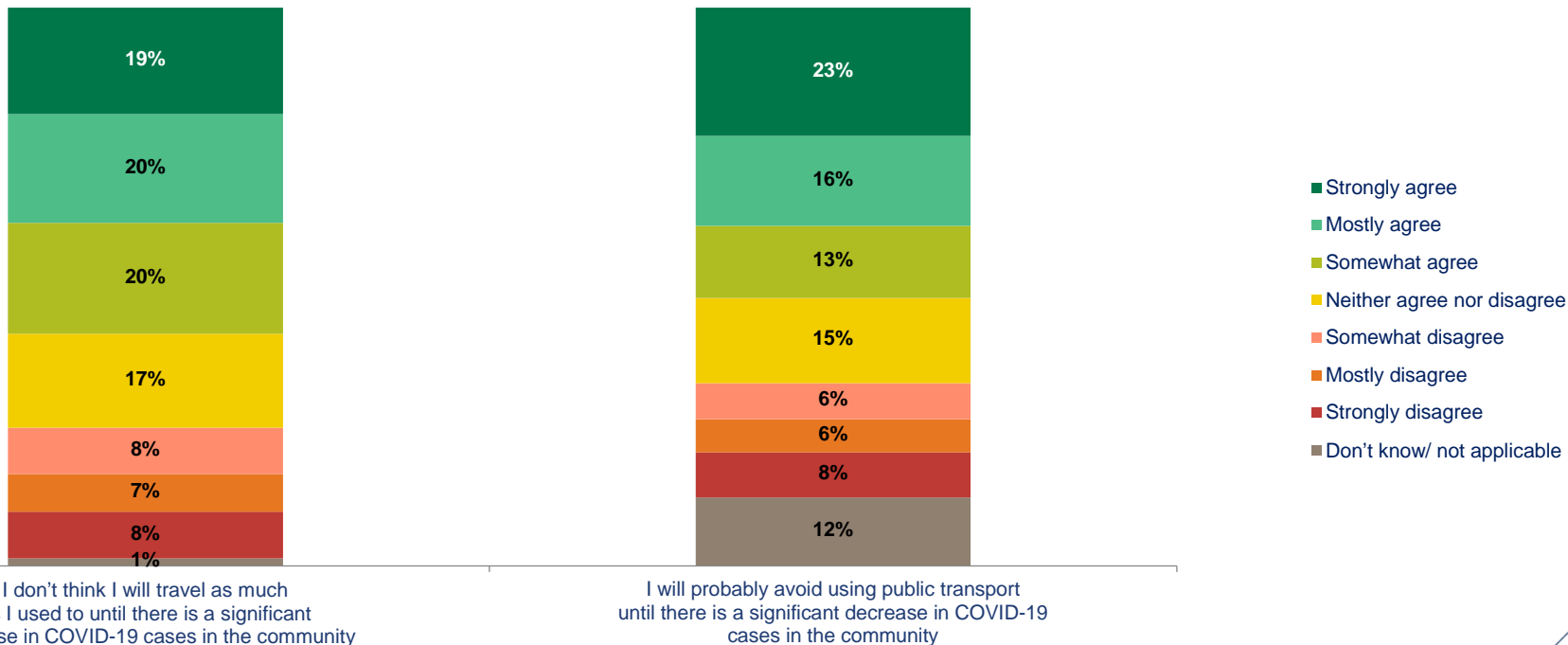


QATT. To what extent do you agree or disagree with the following statements?  
 Base: all adults 15+ in New Zealand \*fieldwork frequency decreased from weekly during level 1



# New Zealanders are waiting for Omicron to peak to return to normal travel behaviours, particularly with regards to public transport

## Impact of COVID on travel



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

Base: all adults 15+ in New Zealand during wave 27, Mar10-Mar14 2022



# It should be noted that more than 2-in-5 have made significant life changes since the 2020 COVID outbreak and these may impact their current travel behaviours

## Non-COVID related life changes since initial outbreak

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



**NETT Moving Home  
23%**

**NETT Family/Social  
16%**


**NETT Work/Education  
25%**

**NETT Work  
13%**

**NETT  
Education 14%**

QLIFE Thinking now about the past 2 years. Which, if any of the following applies to you?

Base: all adults 15+ in New Zealand in March 2022 (n=1,181)



## Section 4 – Behaviours

# Key findings – behaviours

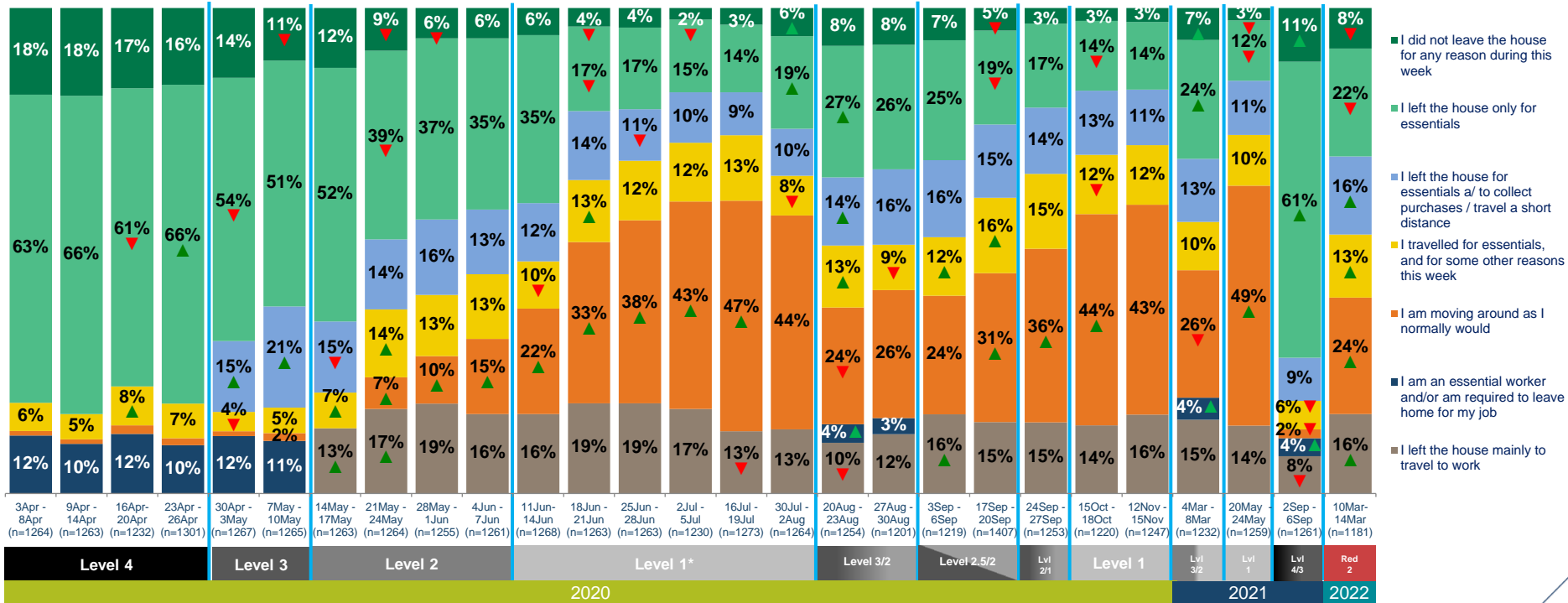
## Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- In light of changing attitudes and concerns around COVID-19 in the country, New Zealanders may change their behaviour in different ways to adapt to their situation. This includes moderating the amount of weekly travel undertaken or taking certain steps to protect oneself in transit, such as wearing masks.
- The proportion of New Zealanders restricting their movement severely decreased significantly since the September Delta lockdown, halving by March.
- This leads to a picture comparable to the split level 3/2 lockdowns of March 2021, or August 2020.
- Almost all of this self-isolation is COVID-related, with a third isolating due to symptoms, testing or positive cases and almost as many self-isolating as a preventative measure.
- Only just under 2-in-5 were self-isolating for non-COVID-related reasons.



# The proportion of people self-isolating decreased significantly, but only a quarter are moving around as much as they normally would like this time last year

## Isolation – travel behaviour



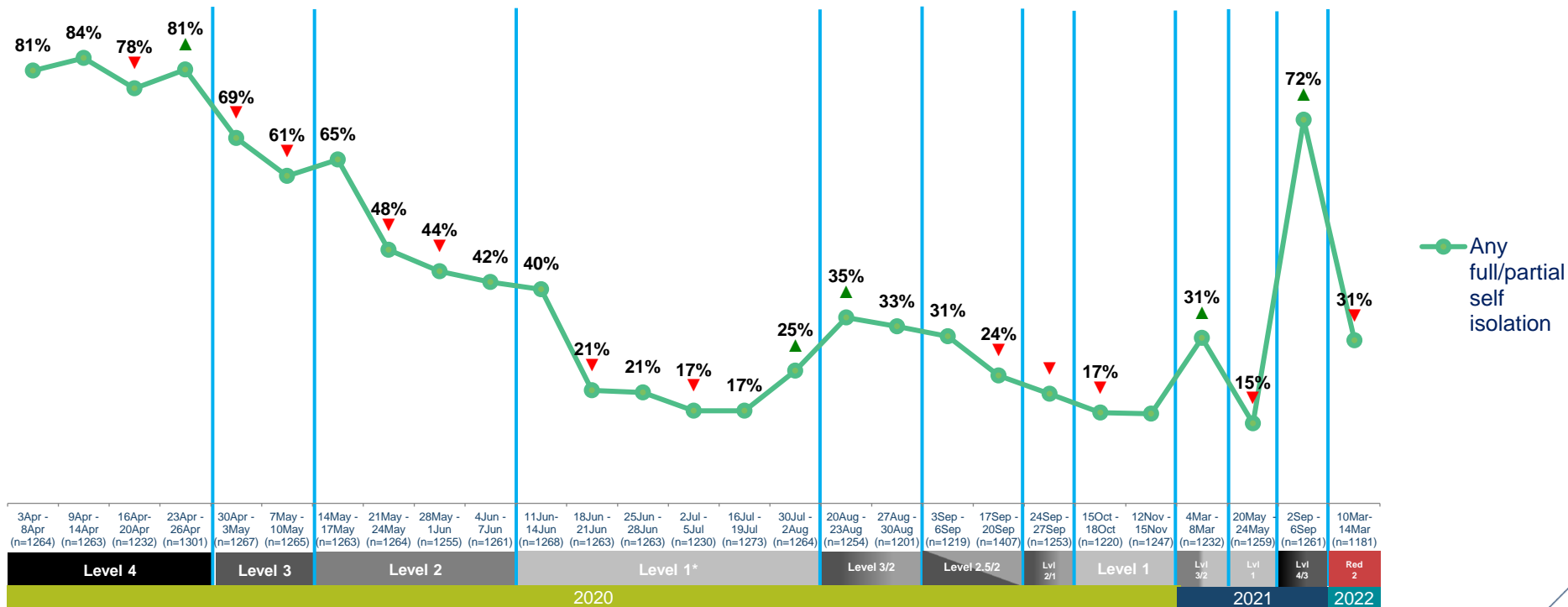
ISO\_1\_TRAVEL Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

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



# Self-isolation has declined by more than half compared to the September Delta lockdown, and is exactly as common as it was a year ago

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

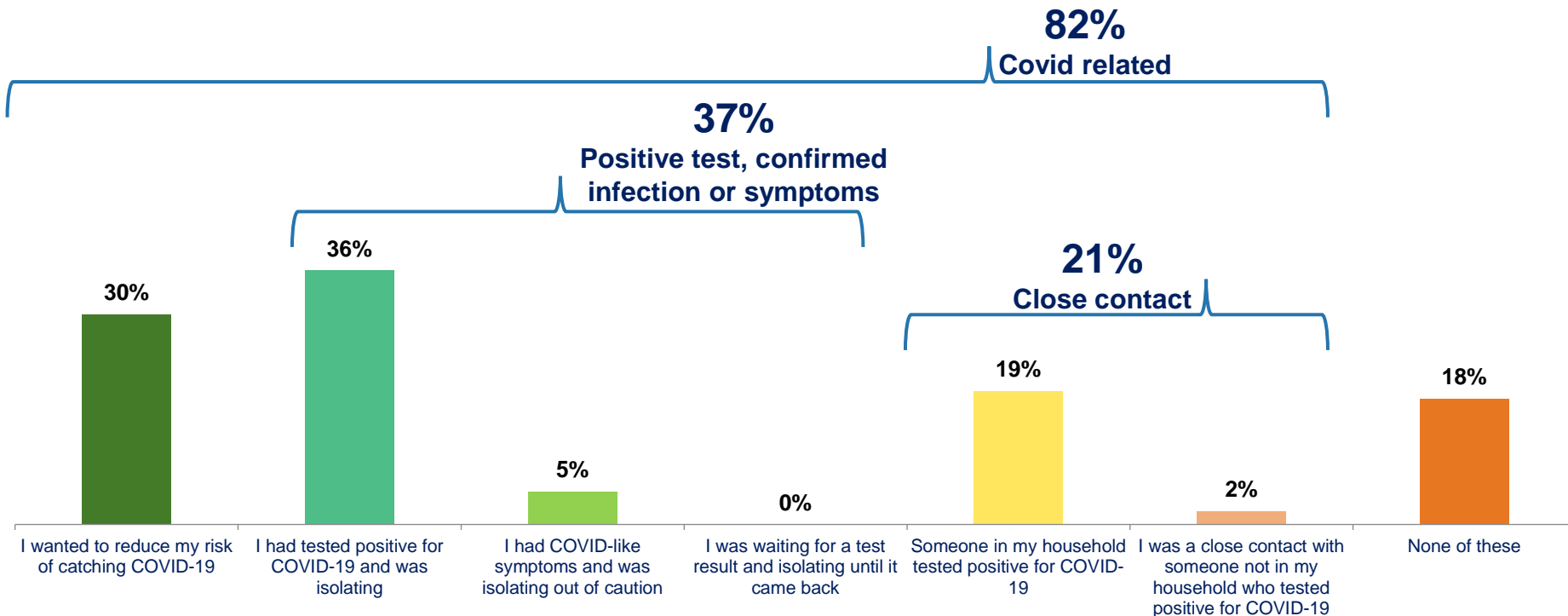


ISO\_1\_TRAVEL Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

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

# 4-in-5 of those self-isolating had COVID-related reasons, with more than a third as possible cases themselves, however, almost as many were just being cautious

## Reasons for self isolation



ISO\_2 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 self isolating during preceding week, Mar10-14 (n=99)



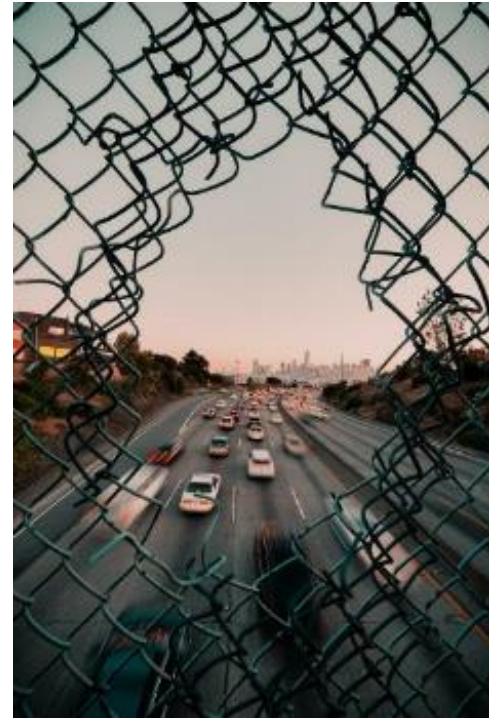


# Section 5 – Journeys and Mode usage

# Key findings – local and domestic journeys

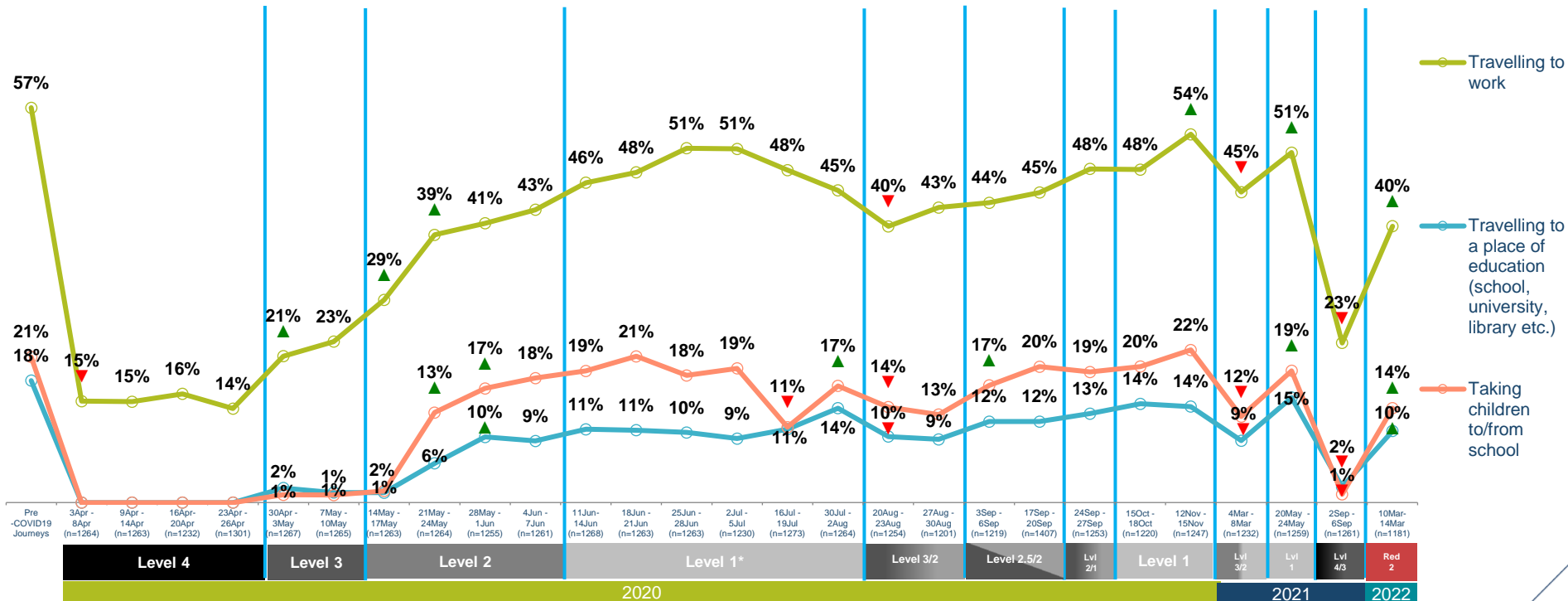
## Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels, we have been tracking changes in journeys made at a local and national level as and when they have been permitted under lockdown conditions.
- Frequent essential journeys like work and education-related journeys recovered significantly, although they are not occurring at the same rates reached when the country was under level 1 restrictions.
- However, those slightly less frequent journeys, like grocery shopping and medical appointments continued to take place at a similar rate under Omicron compared to Delta.
- There was also a significant increase in journeys to support vulnerable friends and family, who may be at greater risk during this time, with Omicron widespread in the community.
- A shift in mode usage has occurred since the last outbreak too.
  - Stated weekly public transport usage has doubled to 14% and while this is below peaks seen when the country was at level 1, it is significantly higher than under Delta restrictions.
  - Active mode travel has significantly decreased since September, but is in line with levels seen at this time last year. This supports previous evidence that active mode travel is more favoured during movement restricted periods



# The proportion of weekly commuters increased significantly compared to the September Delta outbreak and is comparable to the level 3/2 period of Aug 2020

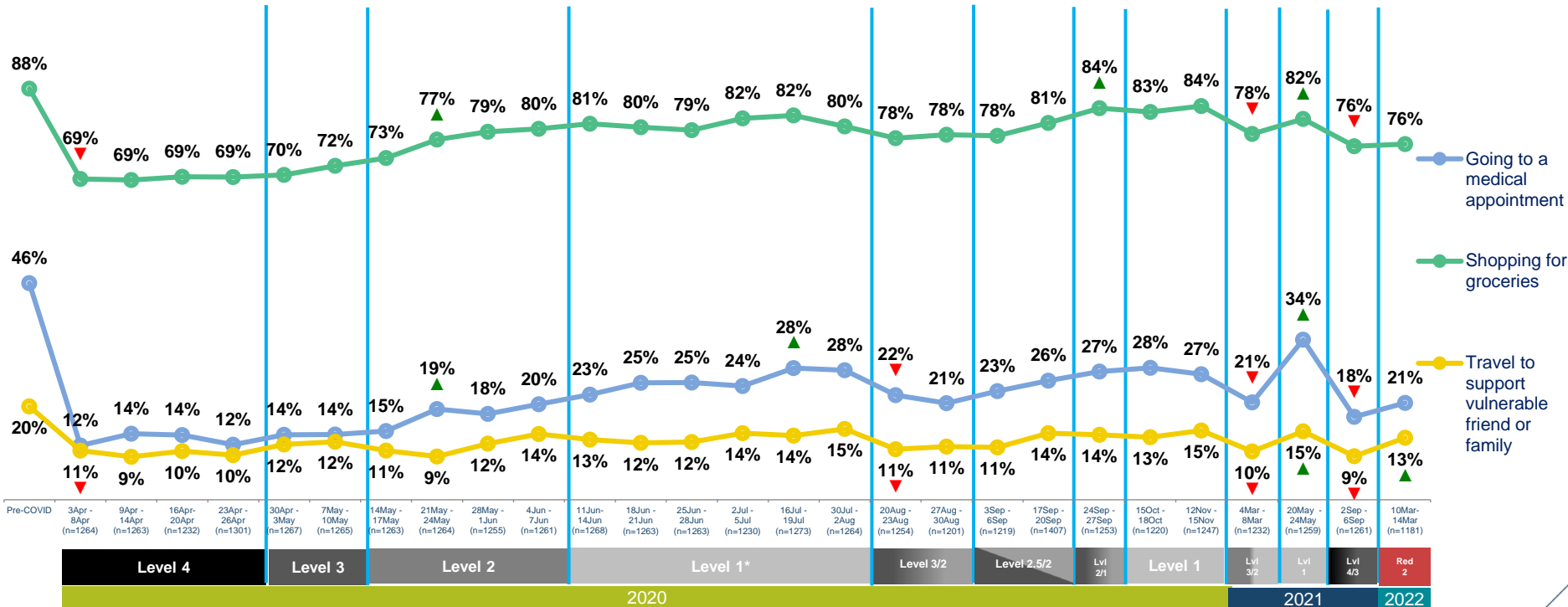
## Frequent essential journeys



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 27 (n= between 1,181 – 1,407)

The sorts of journeys that are carried out weekly, rather than daily, are occurring at roughly the same incidence as under Delta, except for supporting the vulnerable

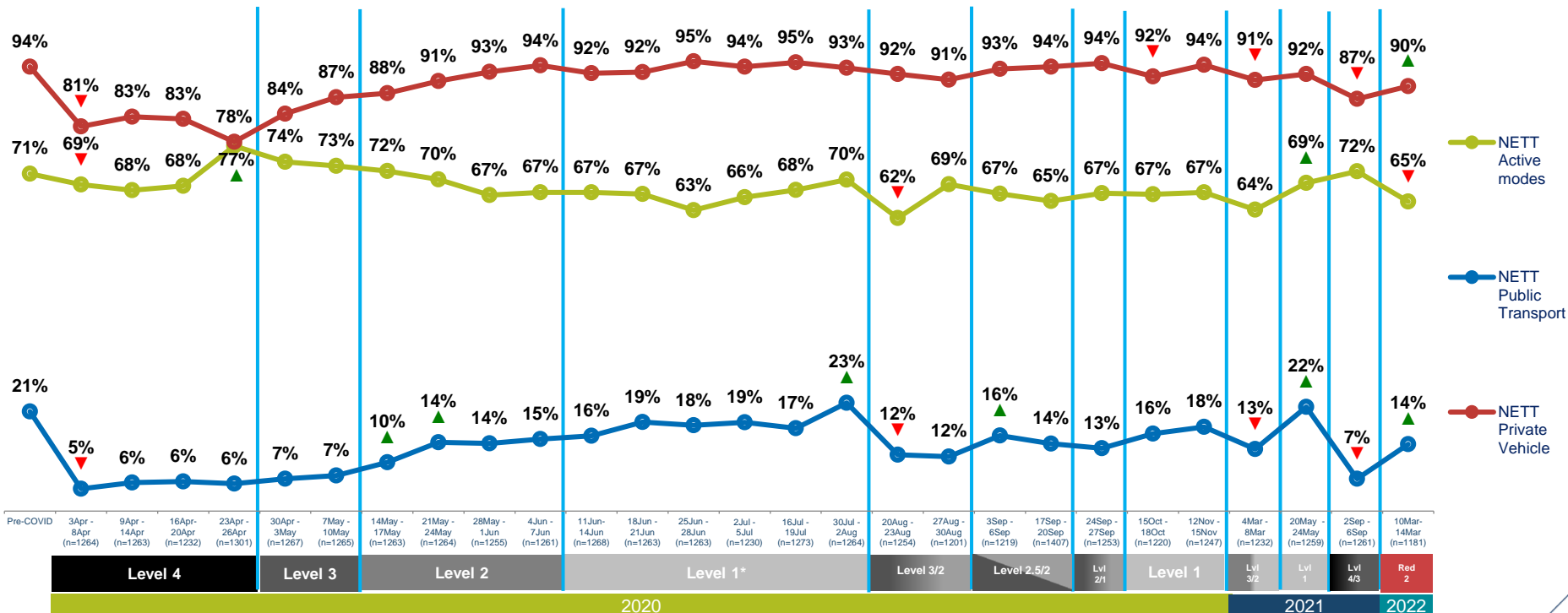
*Less frequent essential journeys*



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 27 (n= between 1,181 – 1,407)

# Stated weekly public transport usage have recovered, doubling since September, whereas active mode travel is also down 7-points

## Changes in mode usage by wave - national



QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 27 (n= between 1,181 – 1,407)





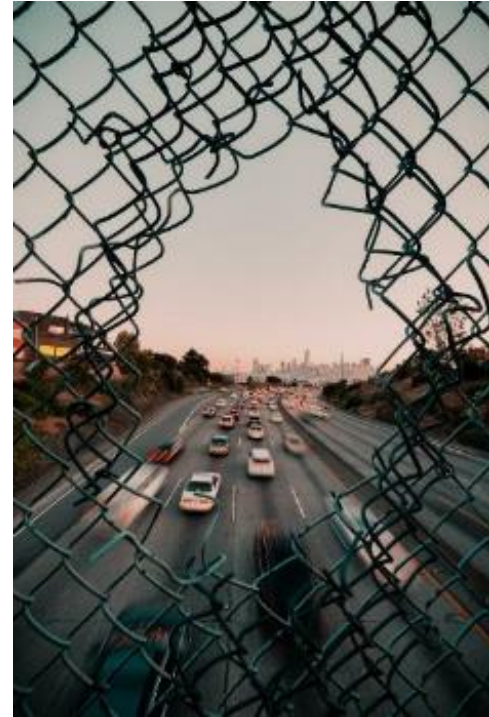


## Section 6 – Public transport

# Key findings – public transport

## Waka Kotahi objective – how and why is travel changing?

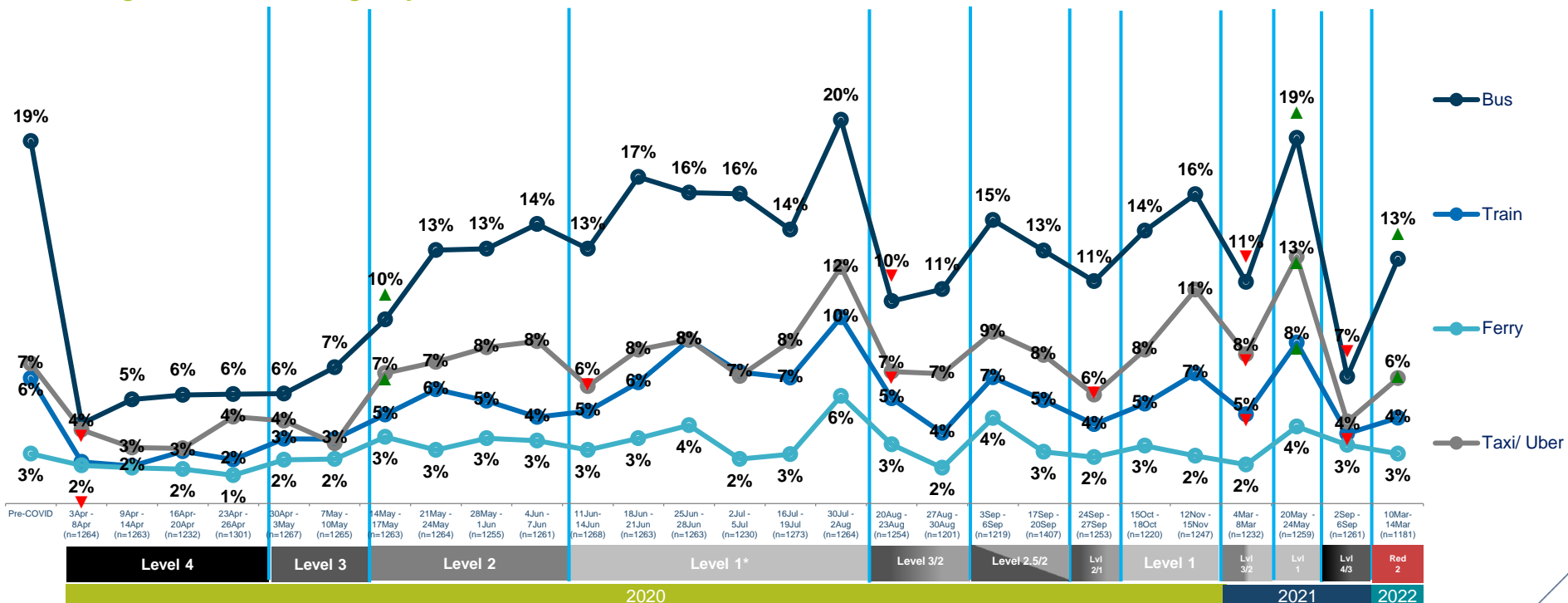
- Within the context of COVID-19 and changing travel restrictions it is important to understand how the transportation modes that New Zealanders are choosing have changed in response to this and which parts of the transport network are most impacted by these changes.
- While public transport usage as a whole has increased significantly, this is concentrated in buses, up a significant 6-points in reported weekly usage since September. However, usage rates are still 6-points short of reported pre-COVID levels.
- Ferry and train usage is stable or declining, with some recent driver and staff shortages potentially impacting this mode choice.
- Private hire vehicles, like taxis and Ubers, have also increased their usage during this time, but have not matched the peak levels of usage seen in May 2021.
- The big change in public transport has been the role in transmission concerns in keeping travellers off services. The proportion citing worries about catching COVID from surfaces or people jumped a significant 13 points this wave, compared to the Delta outbreak in September.
- Normal public transport users are explicitly stating reduced community cases as their key trigger for returning to services, with a third saying they'll travel when they're comfortable of reduced chances of transmission, up a significant 10-points.
- Perceived safety on trains has significantly improved since the September Delta lockdown period, despite a lessened perception of ability to distance. With more travellers on these services, the perception of safety may not be as connected to social distancing as it once was.
- While buses are viewed as more convenient, with better distancing than in the September Delta lockdown, they are still substantially weaker on all image attributes than during the last Level 1 period.





# While public transport usage is up overall, this has mainly occurred with buses and taxis, with ferry usage down slightly and train usage unchanged

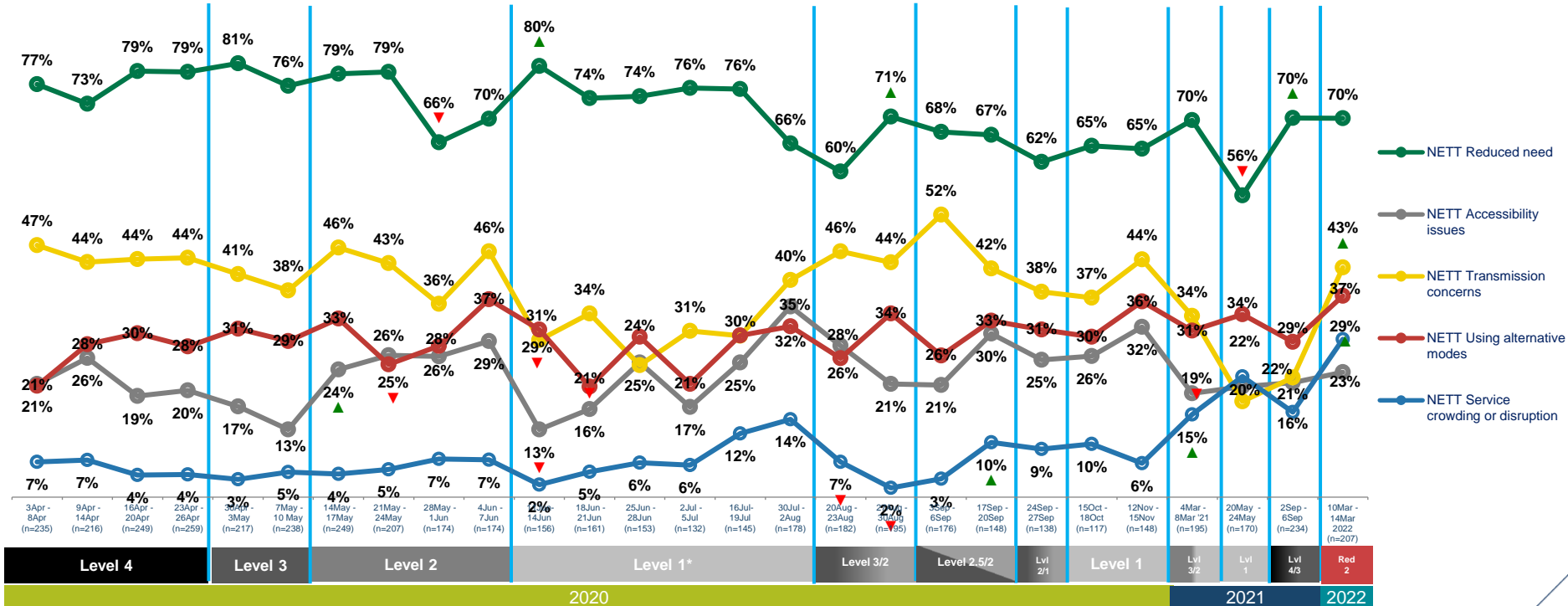
## Changes in mode usage by wave



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? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 27 (n= between 1,181 – 1,407)

# Crowding and disruption increased significantly as a PT barrier, but stated transmission concerns have more than doubled among those reducing their PT travel

## Reasons for decrease in PT activity



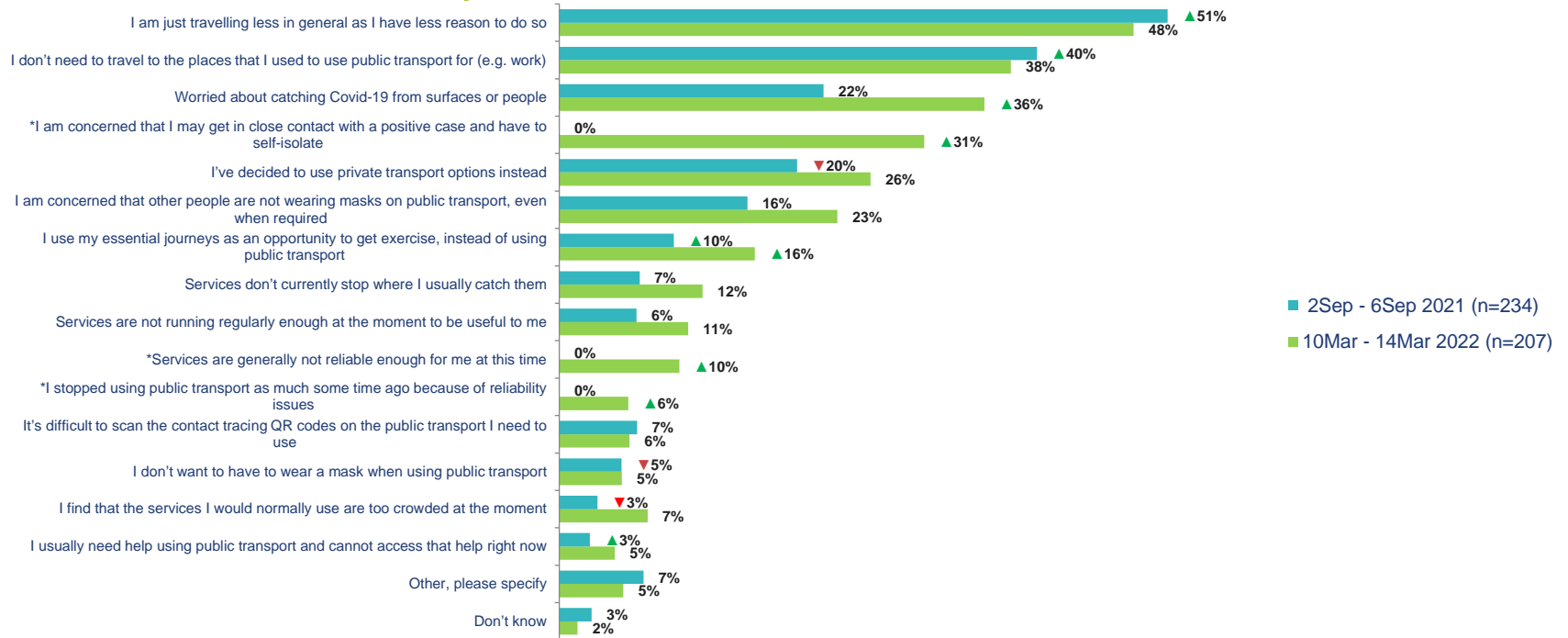
QDEC - For which, if any of the following reasons, has your use of public transport decreased?

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



# The proportion not taking buses, trains and ferries because they're worried about catching COVID from others is up a significant 14-points

## Reasons for decrease in PT activity



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

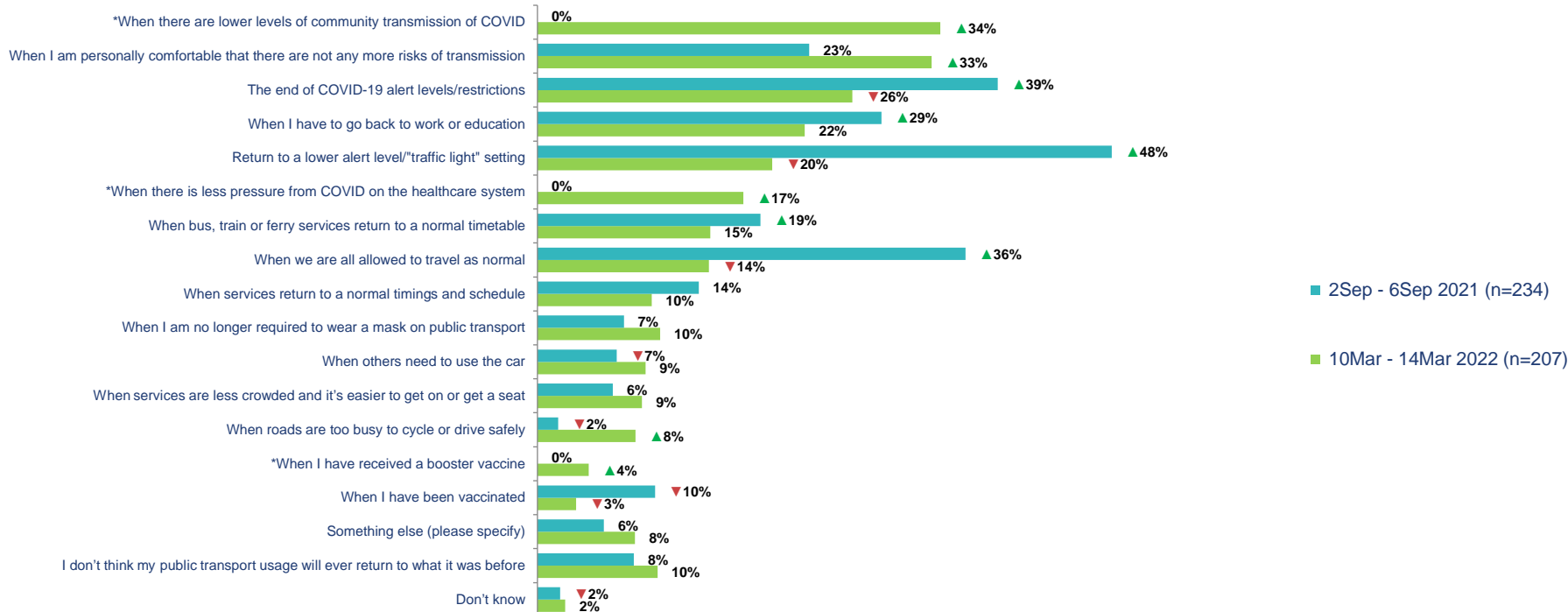
\*indicates new answer code for March 2022

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



# Reduced restrictions are no longer the biggest trigger for returns to PT; instead those staying off PT are explicitly waiting for a fall in community cases

## Triggers for return to PT usage



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

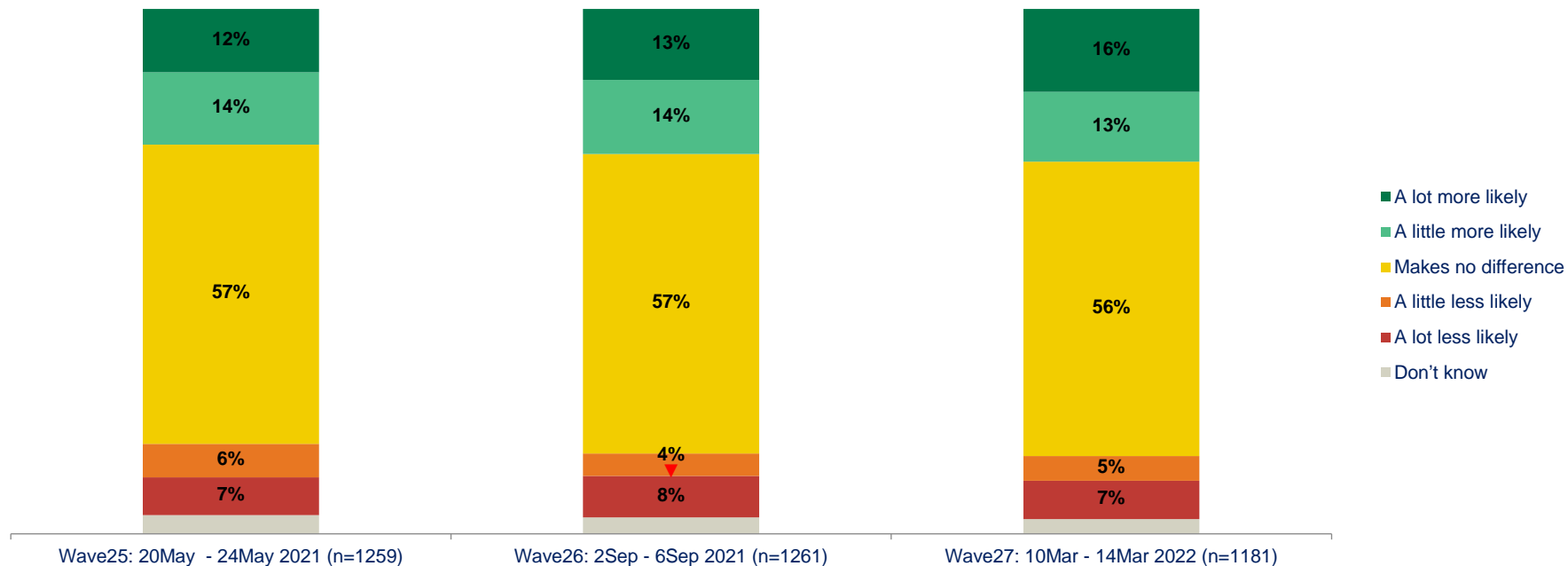
\*indicates new answer code for March 2022

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



# The impacts of masking on PT remains nett positive and is unchanged from September

## Impact of masks on public transport usage



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

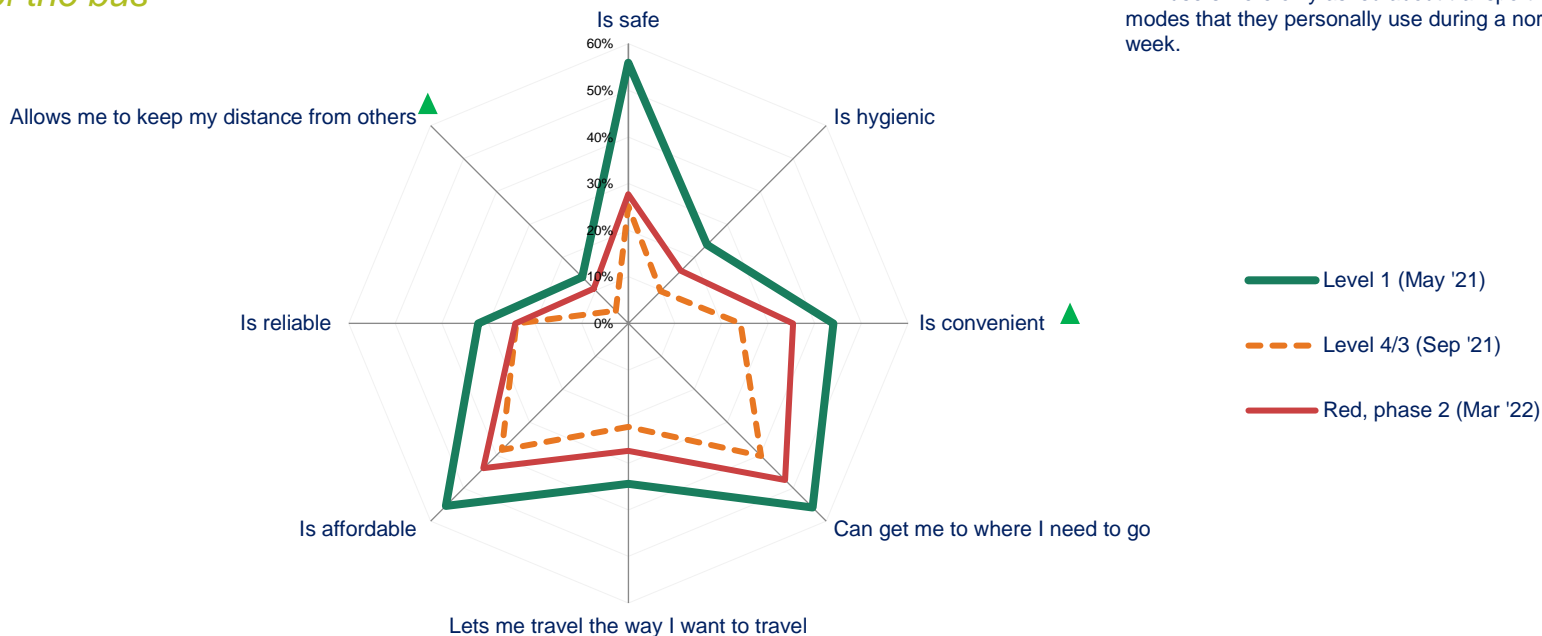
Base: all adults 15+ in New Zealand



# While buses are seen as more convenient with better distancing compared to September, safety perceptions have not improved and are much lower than in L1

## Perceptions of the bus

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

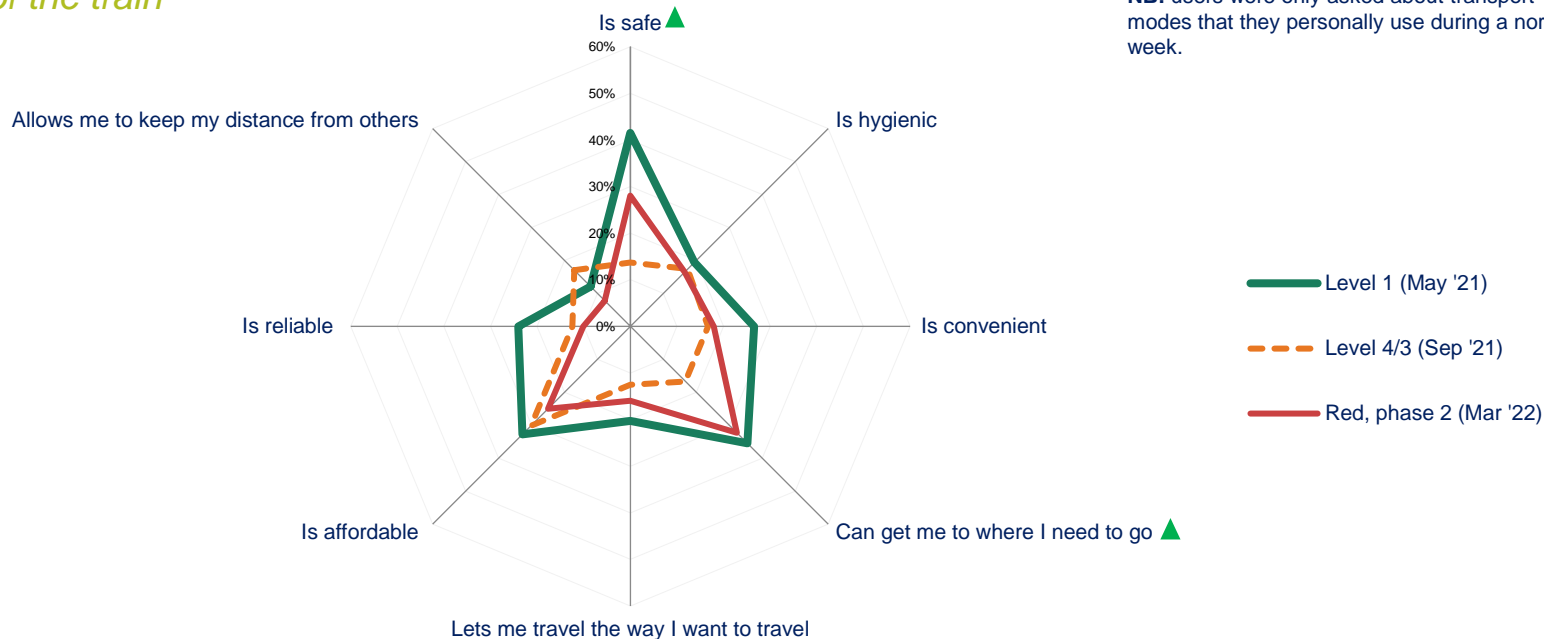


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?  
 Base: New Zealanders who travel by bus normally: Level 1 May '21 (n=276), Level 4/3 Sep'21 (n=253), Red Phase 2 Mar '22 (n=257)

# Perceived safety on trains is significantly better than in September, despite the fact that ability to distance on trains is not as great as it was in that time

## 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 1 May '21 (n=125), Level 4/3 Sep'21 (n=113), Red Phase 2 Mar 22 (n=107)





## Section 8 – Working from home

# Key findings – working from home

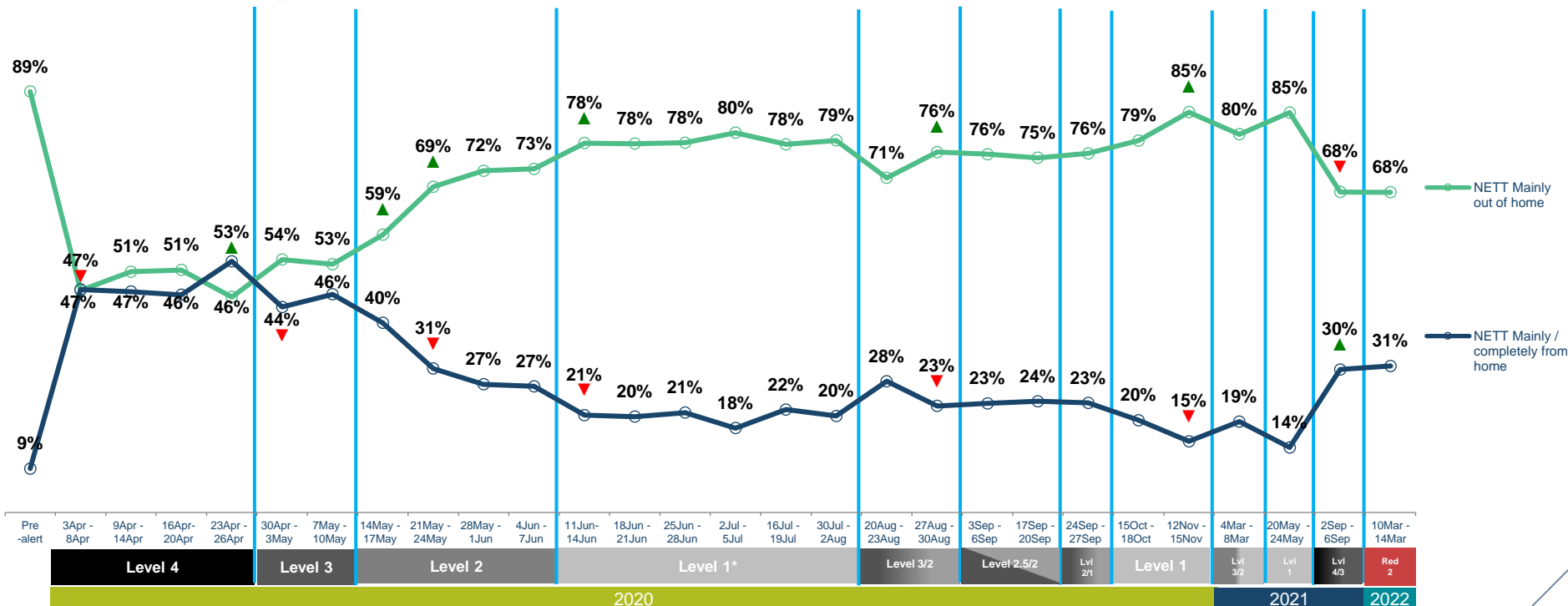
## Waka Kotahi objective – understanding behaviour change

- Commuter traffic makes up a large proportion of the impact on transport infrastructure. As alert levels decrease and restrictions are relaxed, it's important to understand who will return to work travel and how, and who will continue to be absent from the commuter population.
- While the proportion *mainly* working from home is still high compared to a year ago, and unchanged compared to September's Delta-driven lockdown, there are some interesting differences under Omicron, with some indication that the differing restrictions and guidelines are leading to modifications in commuting volume and behaviours.
- Compared to the September Delta lockdown, the proportion travelling to work each day of the week is now much higher. With greater freedom to open and operate, service industries, building, manufacturing and other sectors may be offering more opportunities and shifts across the week than would have been occurring in September.
- This means that there are more commuters travelling on each day than there were in September, but at a total level, the workforce is still working from home at the same rate across the week on balance.



# The proportion of people who mainly worked from home last week has not changed significantly since the Delta lockdown, and is still higher than it was a year ago

## Proportion working in and out of home by survey wave



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

Base: all adults 15+ who are usually working



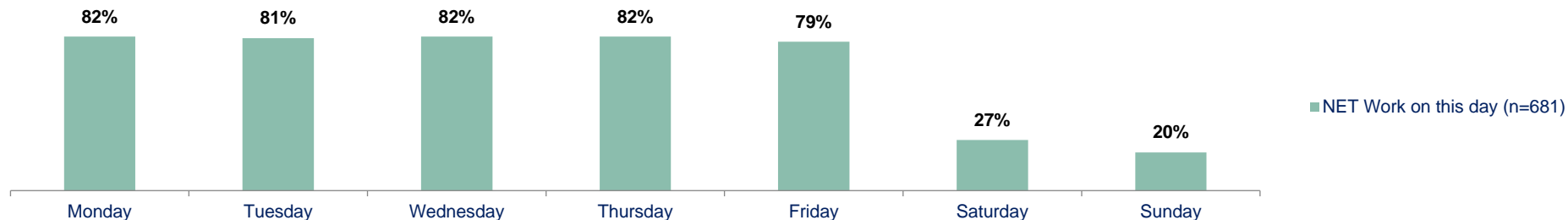
Indicates a statistically significant increase from previous time period



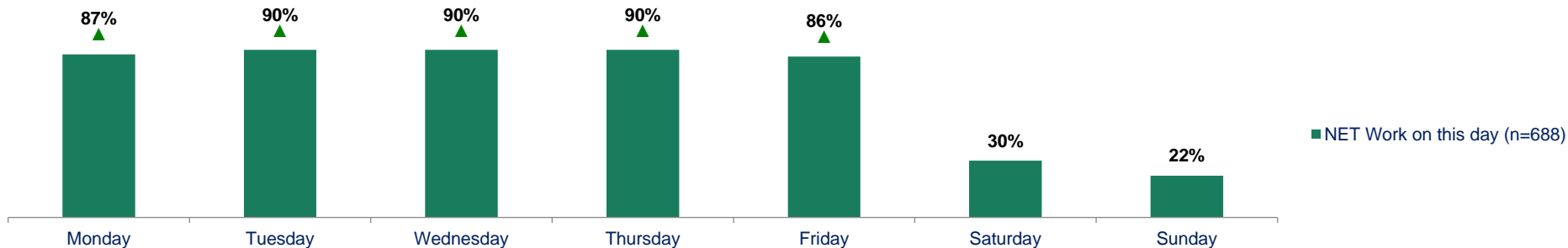
Indicates a statistically significant decrease from previous time period

Compared to the Delta outbreak, it should first be noted that with more businesses fully open, the working population has increased on every day of the week

### Proportion working on each day – September



### Proportion working on each day – March

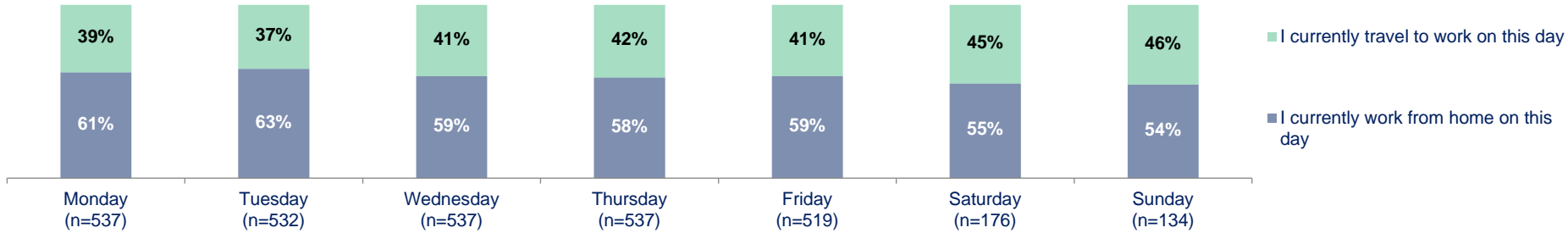


QWORK2E\_NEW. Thinking about the last week, for each day, please state your current work travel arrangements:  
Base: All working adults 15+ in New Zealand in wave 26 (2Sep-6Sep), wave 27 (10Mar-14Mar)

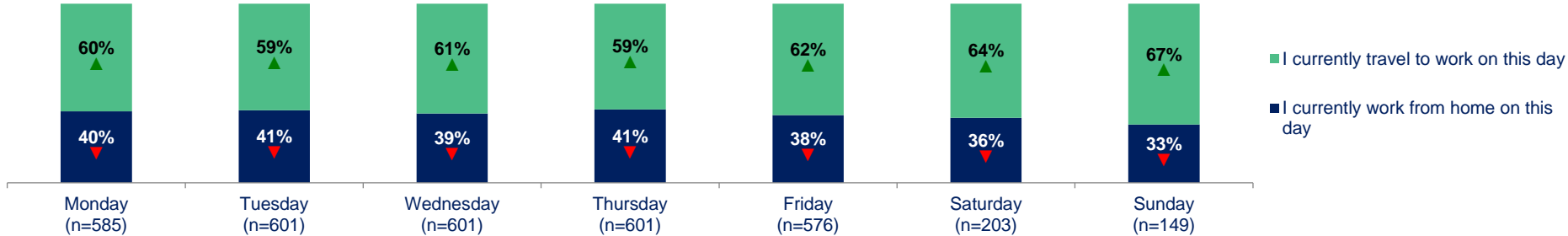


# As the proportion working on each day has increased, the balance of commuters vs those working from home has also shifted, with more commuters on each day

## Share of workforce working from home on each day – September



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

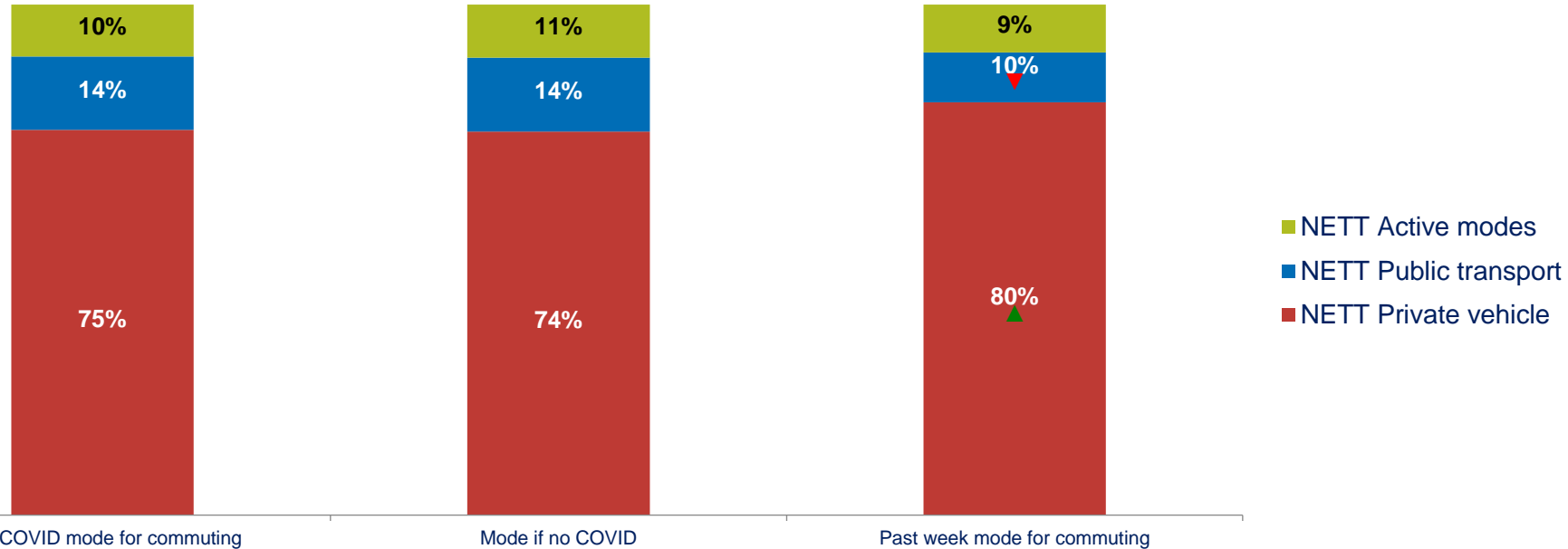


QWORK2E\_NEW. Thinking about the last week, for each day, please state your current work travel arrangements:

Base: All working adults 15+ in New Zealand on each day of the preceding week in wave 26 (2Sep-6Sep);

# However, those who *are* travelling are still not using public transport or active modes quite as much as they would like, or as much as they did before COVID

## Usual, ideal and actual mode used



QMODE1 Thinking again about how you would normally travel within the course of a normal week in March 2020 (before the outbreak of COVID) How would you normally make each of the following types of journeys listed below? For each journey, please select the method of transport that makes up the majority of the journey. QMODE1B And how would you make each of these journeys today if COVID-19 did not exist?

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: all adults 15+ in New Zealand who travelled to work during the past week



# More than 2-in-5 public transport commuters are currently missing from the commuting population, even if they only make up 1-in-5 of those working from home

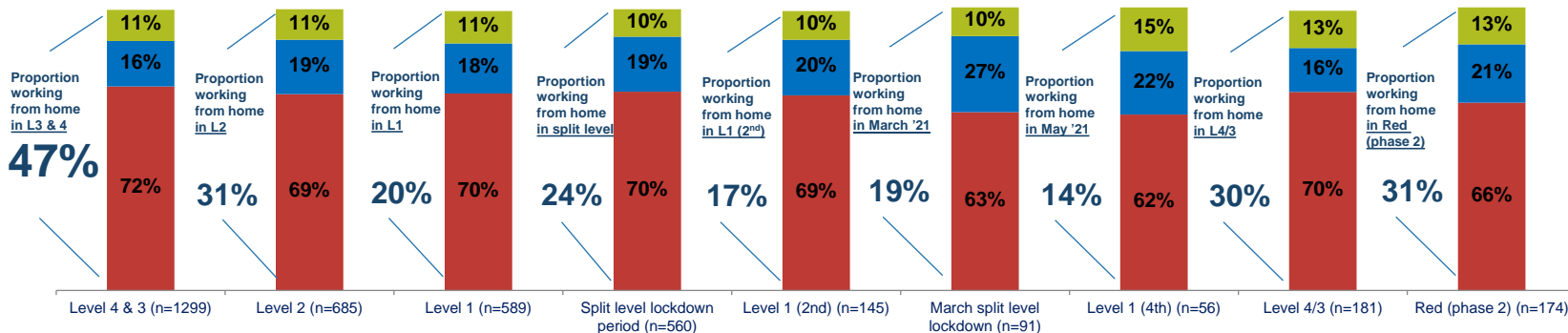
## Proportion of commuters working from home who would normally travel by each mode

■ NETT Active modes

■ NETT Public transport

■ NETT Private vehicle

Proportion who would normally work from home — 9%



## Proportion of each commuter type working from home

Proportion WFH by level	47%	31%	20%	24%	17%	19%	14%	30%	31%
Within active mode commuters	53%	31% ▼	17% ▼	18%	12%	15%	13%	40% ▲	37%
Within private vehicle commuters	43%	25% ▼	13% ▼	16% ▲	11% ▼	13%	9%	25% ▲	25%
Within public transport commuters	62%	42% ▼	24% ▼	36% ▲	19% ▼	29%	15% ▼	49% ▲	43%

QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work? By QMODE1\_1 How would you normally make each of the following types of journeys listed below? – travelling to work

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

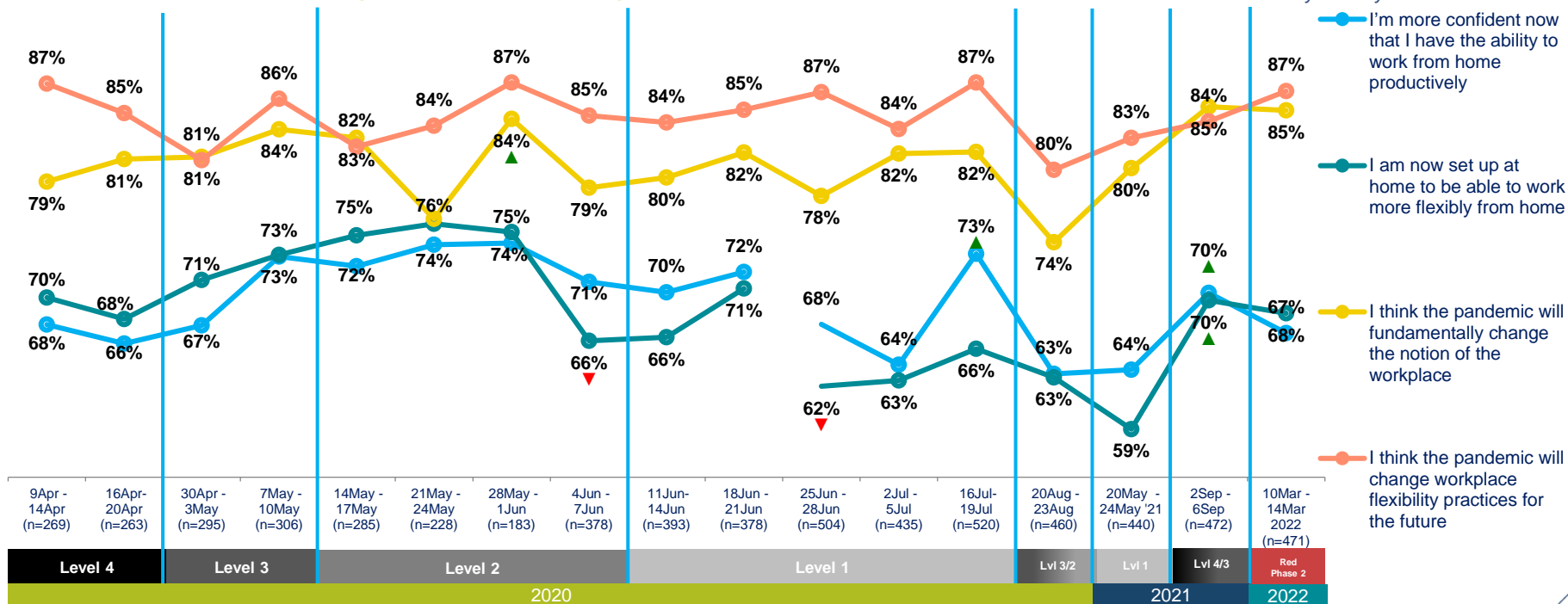




# There is as great an expectation of workplace changes overall as there has ever been, workers are about as confident in their ability to WFH as under Delta

## Future attitudes to working from home (all agree)\*

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

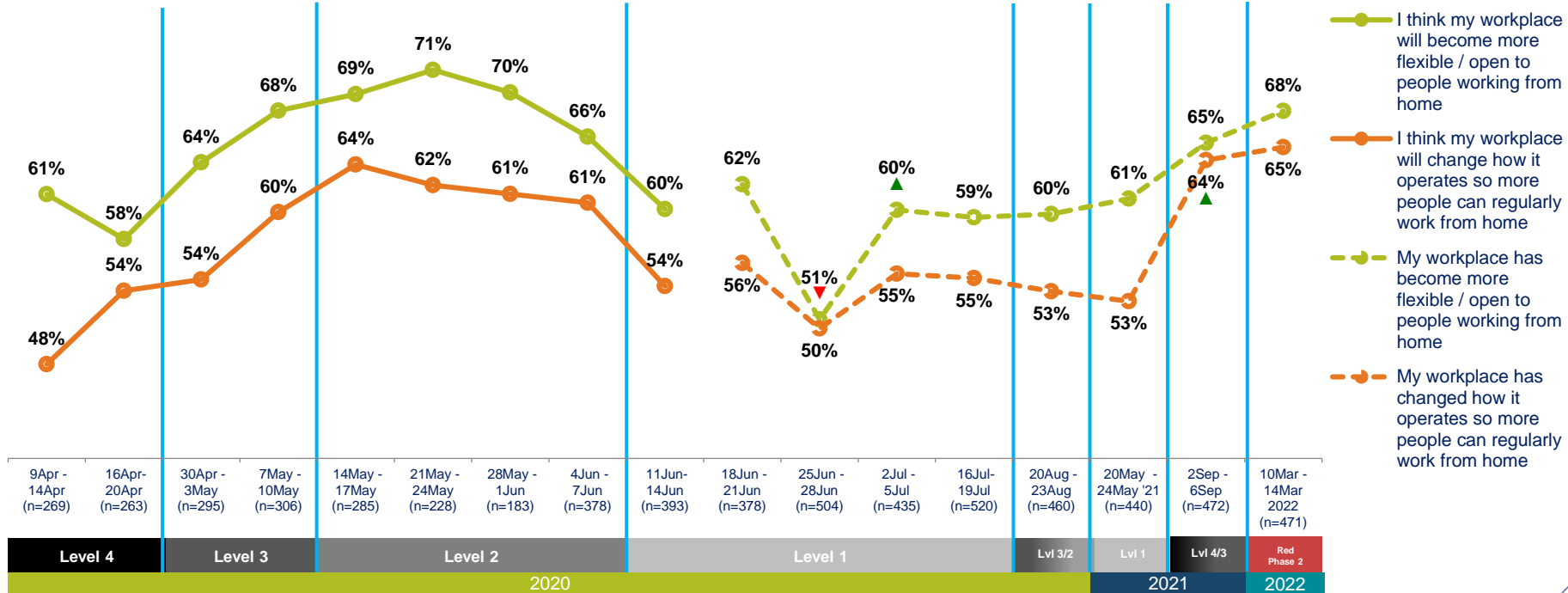


QWORK6a. Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements? Base: All adults 15+ in New Zealand who were working from home at time of interviewing (9 Apr – 21 Jun); all currently working from home, who had worked from home, or who were able to wfh (from 25 Jun) \*Note change in sample qualifying into survey question

# Perceived flexibility in workplaces continues to increase, with two thirds saying their workplace has changed how it operates to enable more working from home

## Future attitudes to working from home (all agree)\*

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



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

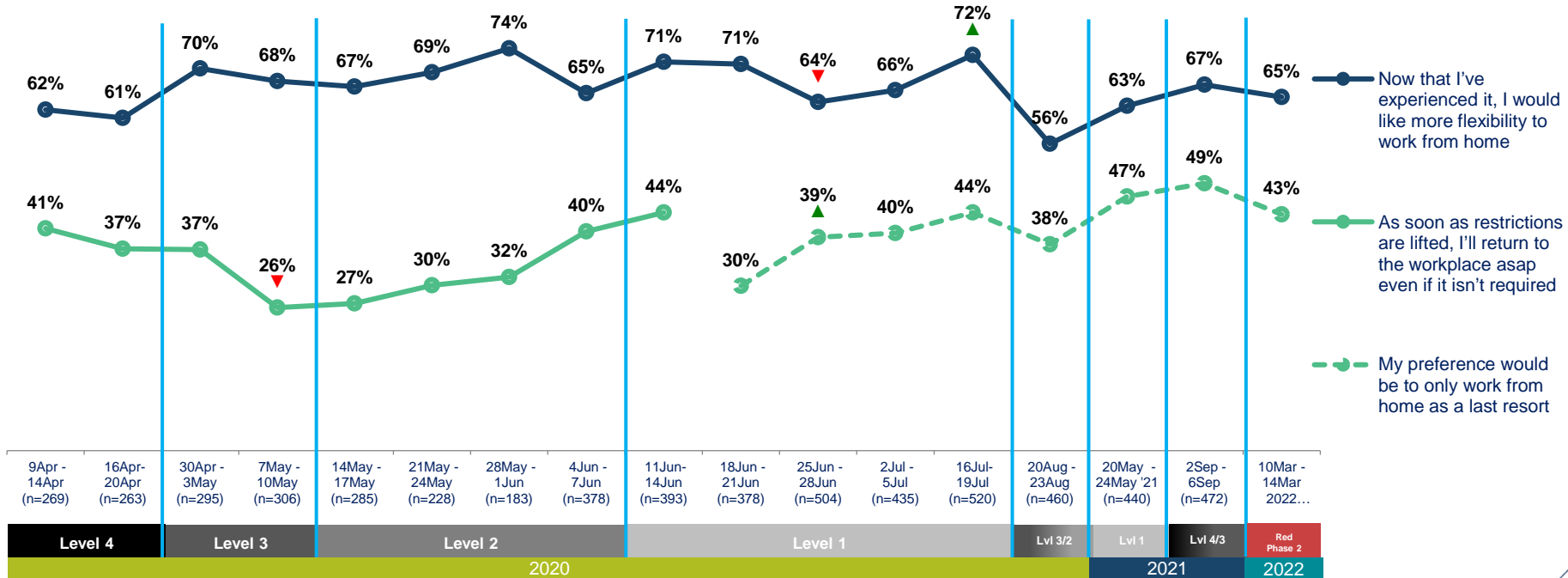
Base: All adults 15+ in New Zealand who were working from home at time of interviewing (9 Apr – 21 Jun); all currently working from home, who had worked from home, or who were able to wfh (from 25 Jun)

\*Note change in sample qualifying into survey question over time

# Desire to work from home, while high, does not appear to have increased as workplaces have changed

Future attitudes to working from home (all agree)\*

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



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

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

\*Note change in sample qualifying into survey question over time



## Section 8 – Impact of Omicron on schools

# Key findings – Impact of Omicron on schools

## Waka Kotahi objective – understanding behaviour change

- With schools open and Omicron in the community, COVID impact on school related journeys are no longer likely to be as uniform as they once were.
- Some schools are experiencing closures due to outbreaks, while others are experiencing staff shortages which make in-person teaching infeasible for certain classes only. Others still are unaffected at the time of fieldwork.
- This can add up to a complex picture for parents of school age children, particularly if they have children at multiple schools. At time of fieldwork, a quarter of parents had at least one child at a COVID-impacted school. However, almost all of these also had a child at a school that was not impacted.
- This translates into a situation where 17% of parents have one child at home, and almost half of these also have a child travelling to a school as normal.
- Within this context, there has been some shift in transport modes used for the school-run. Most parents appear to prefer to travel as they did pre-COVID when taking their children to school. However, there is evidence that some are switching from driving to active mode options for this type of journey.
- Where parents are taking fewer children to school than usual, active modes may be more feasible for the travel that they need to do, rendering driving unnecessary. However, this may also be influenced by better weather than they usually experience during the school run, which makes walking or cycling more feasible than usual.

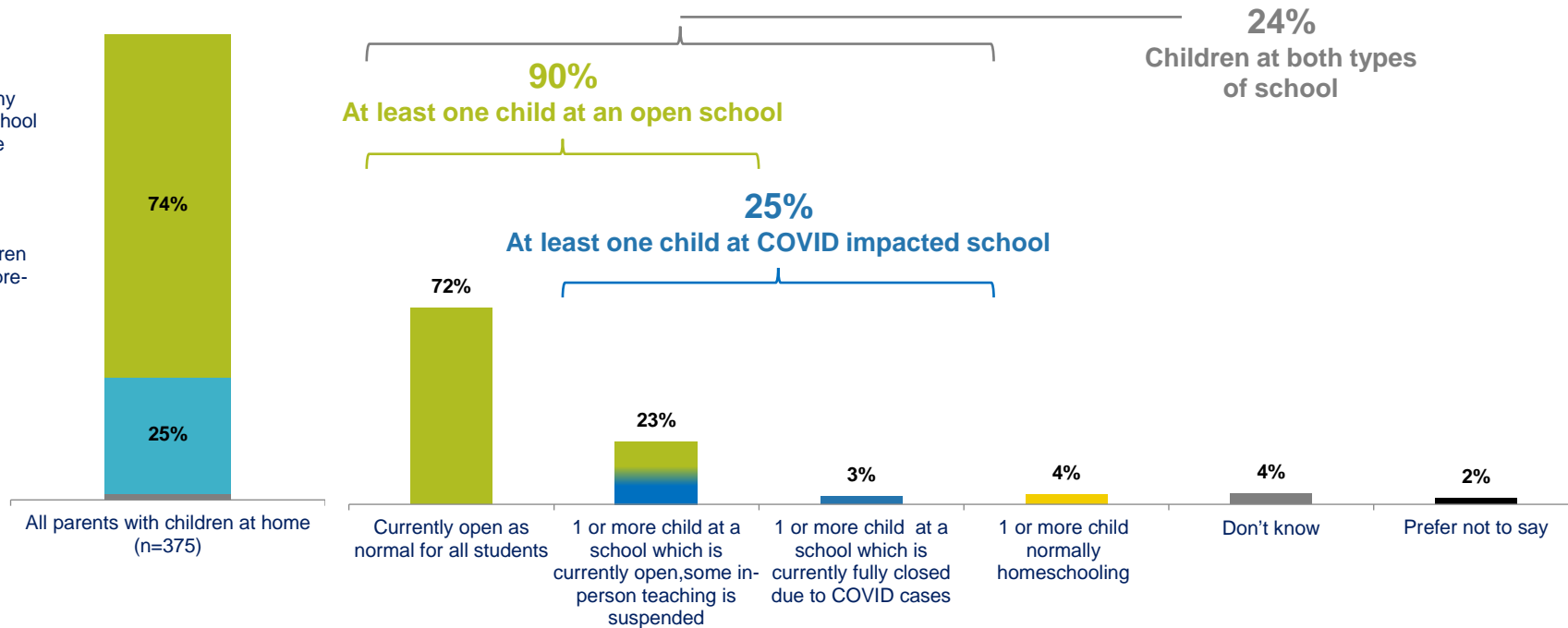


# While 1 in 4 parents have a child at an impacted school, almost all of these have another child at a non-impacted school, indicating a more complex school commute

## Parental status

## School/pre-school status

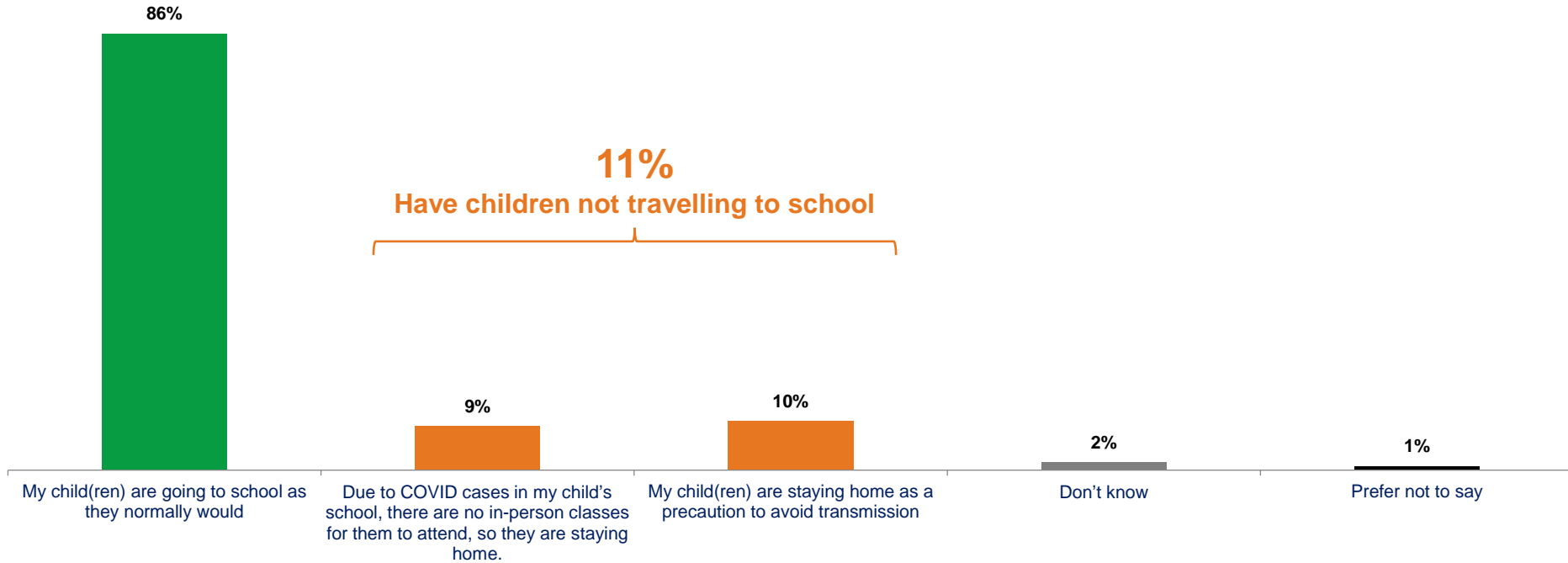
- One or more of my child(ren) is of school or pre-school age
- None of my children are of school or pre-school age
- Don't know



QSCH1 You said that you have children living at home with you. Which, if any of the following applies to you? QSCH2 Which, if any of the following apply to your children?  
 Base: all adults 15+ in New Zealand who have children at home (n=375); all with school or pre-school aged children at home (n=280)

# Only 1 in 10 parents of children at open schools are keeping their kids home; there is a high level of overlap between precautionary action and COVID forced action

## Impact at open schools

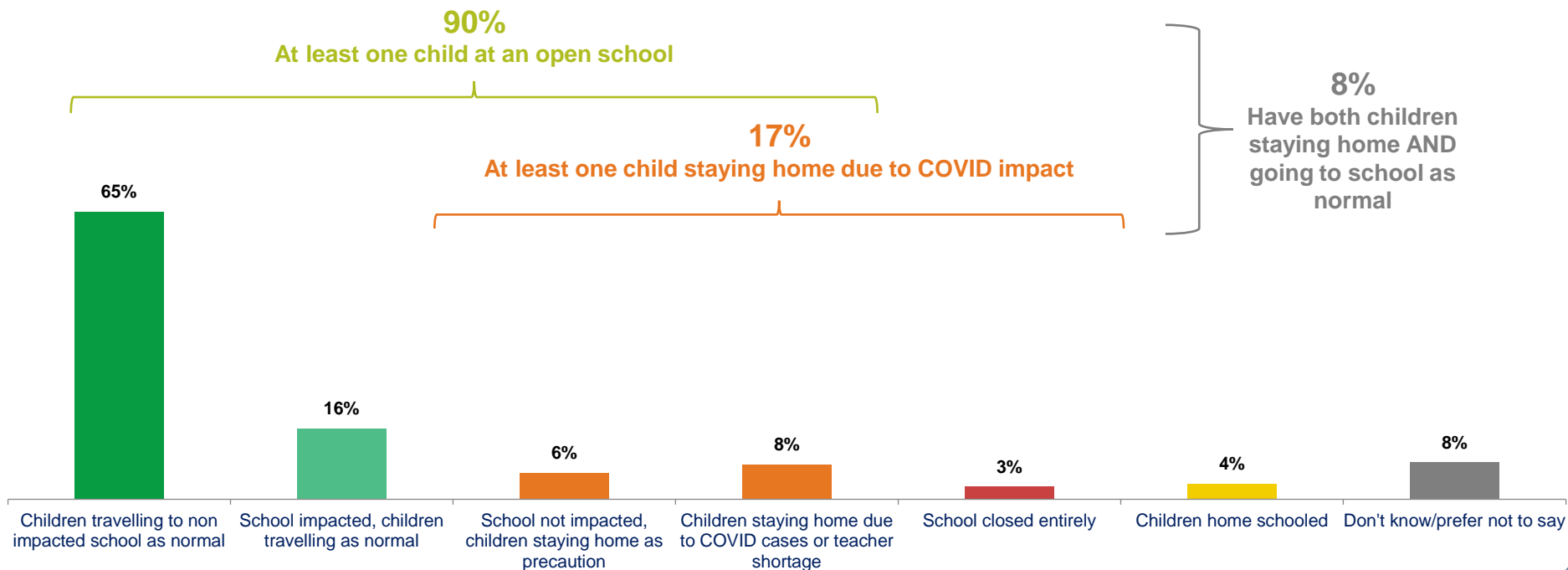


QSCH3 You said that your child(ren) go to a school that is currently open. Which, if any of the following, apply to your children?

Base: all adults 15+ in New Zealand who have children at a currently open school(n=252)

# Within the total parent population, around 1 in 6 currently have a child staying home due to COVID, but three quarters have at least one child travelling as normal

## Overall impact on school aged population



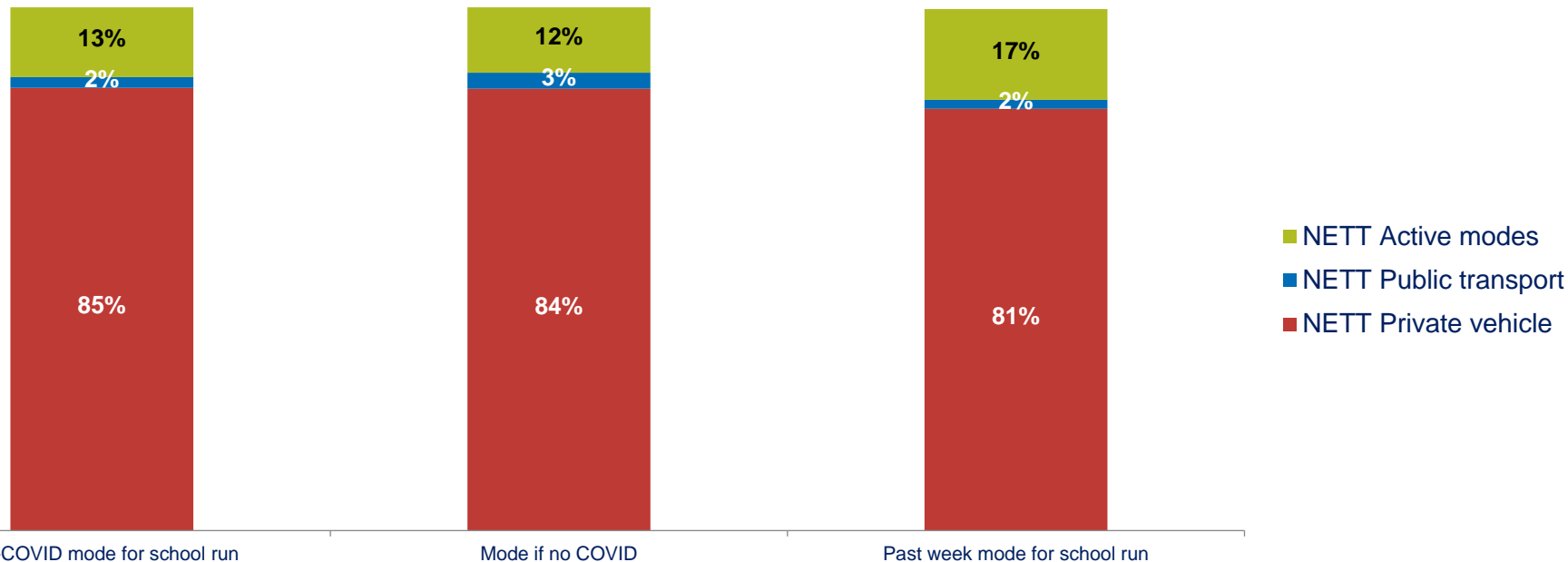
QSCH2 Which, if any of the following apply to your children? QSCH3 You said that your child(ren) go to a school that is currently open. Which, if any of the following, apply to your children?

Base: all adults 15+ in New Zealand with school or pre-school aged children at home (n=280)




# Mode shift is occurring within the school run at present, but this appears to be a shift from private vehicles toward active mode travel

*Usual, ideal and actual mode used*



QMODE1 Thinking again about how you would normally travel within the course of a normal week in March 2020 (before the outbreak of COVID) How would you normally make each of the following types of journeys listed below? For each journey, please select the method of transport that makes up the majority of the journey. QMODE1B And how would you make each of these journeys today if COVID-19 did not exist?  
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: all adults 15+ in New Zealand who took children to school during past week (n=180)





## Section 9 – Wellington

# Key findings – Wellington

## Waka Kotahi objective – understanding behaviour change

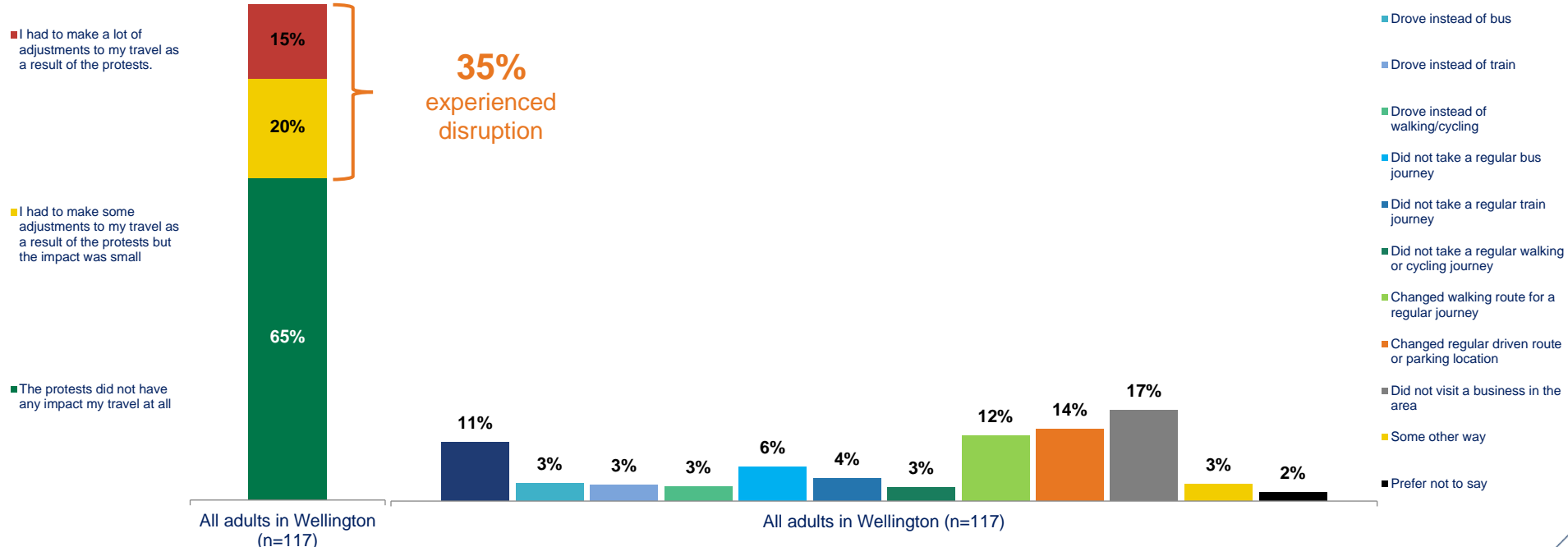
- In the weeks leading up to this most recent wave, central Wellington experienced prolonged protests in the area around parliament, where many in the region work, shop and spend some of their leisure time.
- While this disruption had concluded a week before fieldwork, existing data indicated that during this period, public transport usage around the city had been suppressed. It is therefore important to understand the scale of reduction in journeys and mode usage from that time period and whether or not this was sustained in the week after the encampment was cleared.
- While most said that they were not impacted at all, just over a third reported that they made some adjustments to their travel during this time. 1 in 6 of those from the Wellington area indicated that they chose not to visit the city centre for shopping, restaurants or bars, with around 1 in 10 saying they worked from home rather than travelling into work.
- Public transport and active mode travel were impacted at a similar scale, with just over 1 in 10 choosing to drive or forgoing such a journey entirely.
- However, there is no evidence that this disruption was sustained into the following week. Regular essential journeys in Wellington followed the national pattern compared to September, with a significant increase in the number of commuter journeys (even if these are still occurring at a lower rate compared to a year ago)
- In addition, public transport usage appears to be recovering in Wellington as it is nationally and active mode travel is slightly suppressed compared to September, also in line with national trends.
- It therefore appears that while the journeys and travel choices of some people in Wellington were modified during the protests, this impact has not been sustained, with travel in Wellington falling into line with the national picture, if not back to normal.



# Just over a third of Wellington residents said they experienced disruption during this time, with 1 in 6 not visiting a central business and 1 in 10 working from home

## Any disruption

## Nature of disruption

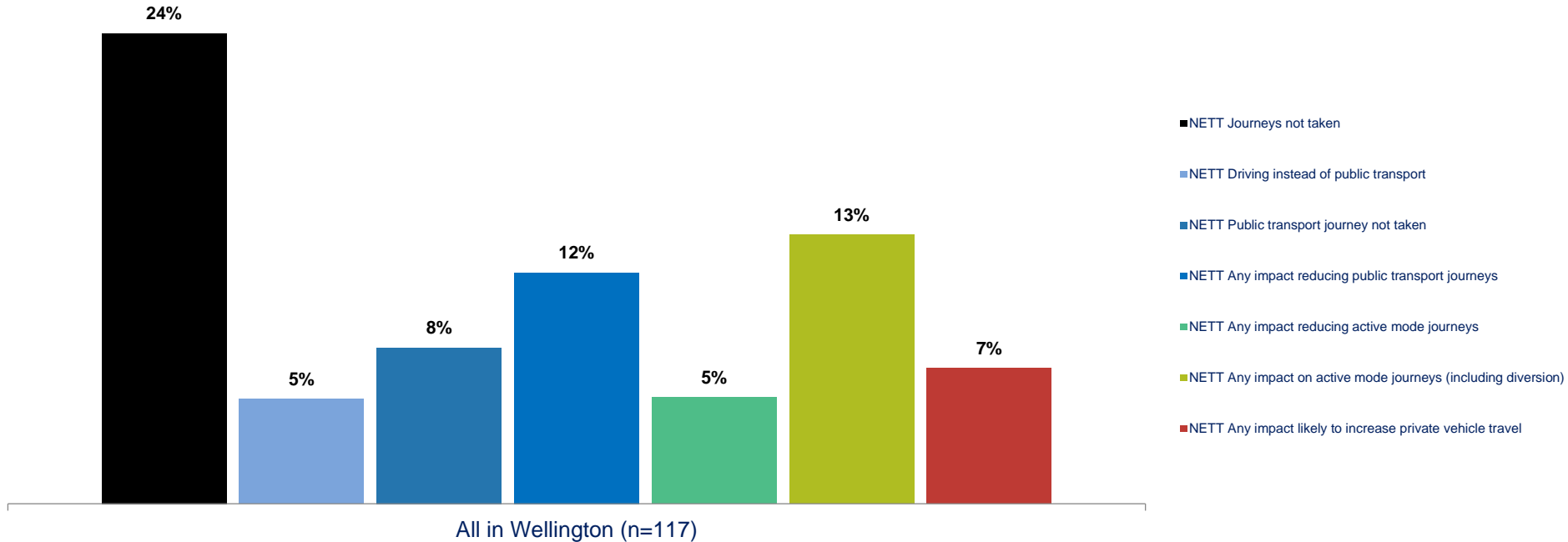


WGTN1 As you may be aware, in recent weeks there have been protests in central Wellington around parliament. To what extent, if at all, did you have to make any adjustments to your journeys or travel choices as a result of the protests? WGTN2 In which, if any, of the following ways was your travel in the city impacted by the protests?

Base: all adults 15+ in Wellington Mar10-14

# 1 in 4 Wellingtonians chose not to take a journey that they otherwise would have taken, with public transport and active mode travel impacted on a similar scale

## Disruption themes

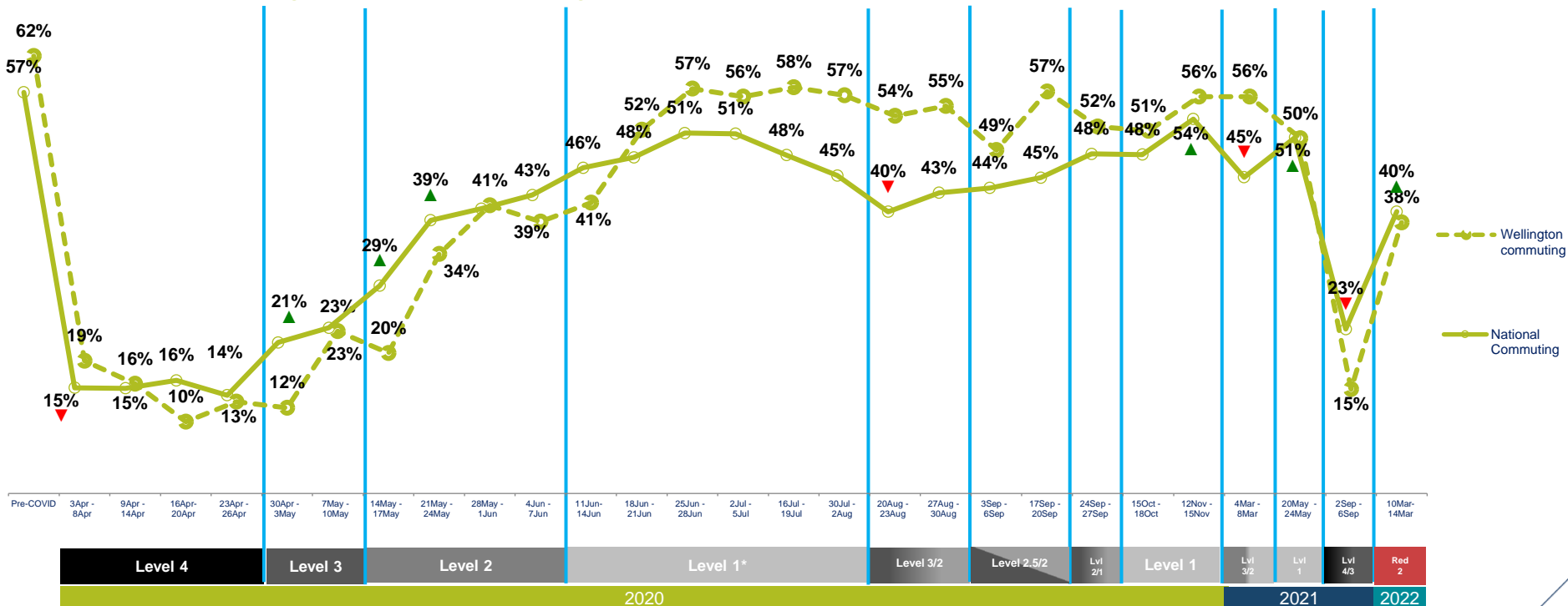


WGTN1 As you may be aware, in recent weeks there have been protests in central Wellington around parliament. To what extent, if at all, did you have to make any adjustments to your journeys or travel choices as a result of the protests? WGTN2 In which, if any, of the following ways was your travel in the city impacted by the protests?

Base: all adults 15+ in Wellington Mar10-14

However, journeys have been returning to normal at a similar rate to the national picture, suggesting that this impact was not sustained, with commuting back to normal

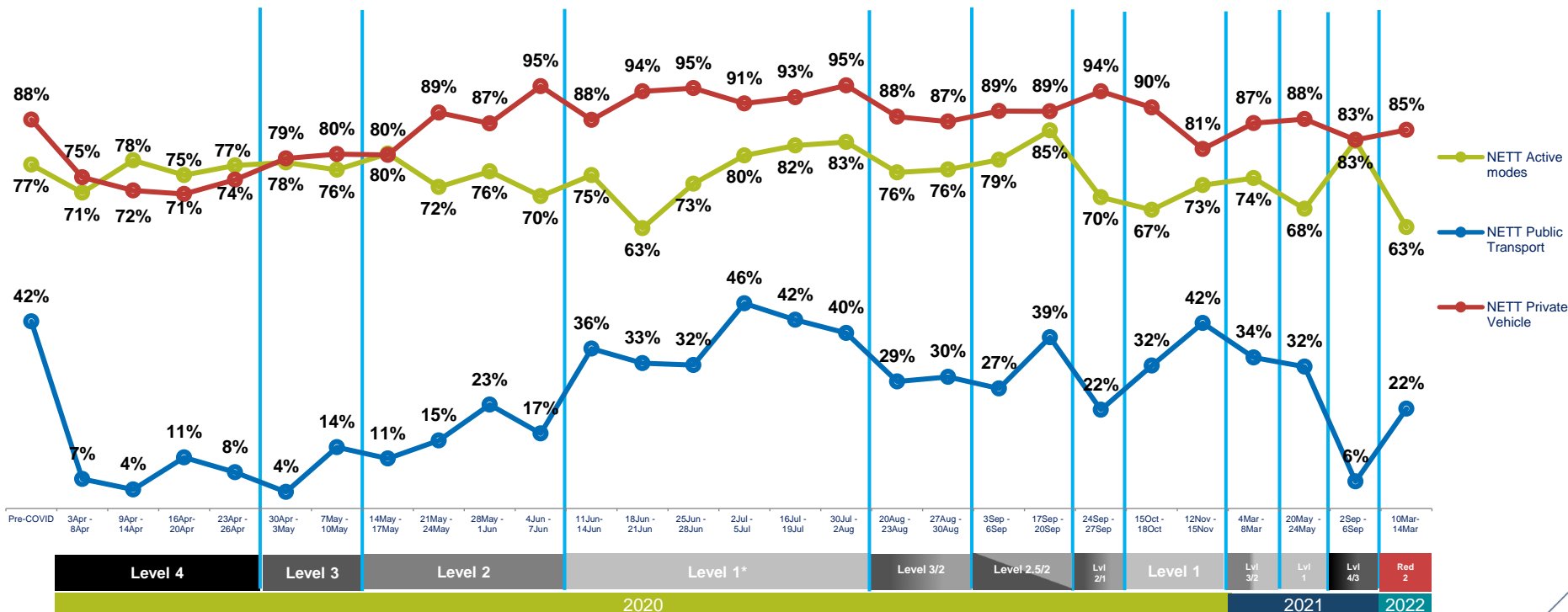
*Proportion travelling to work in preceding week*



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Wellington in Benchmark: (n=463); Wave 1 – 27 (n= between 117 – 220)

# Similarly, the recovery in PT usage seen nationally also occurred in Wellington, suggesting that by now, PT is no more disrupted by the protests than COVID

## Past week mode usage, Wellington



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Wellington in Benchmark: (n=463); Wave 1 – 27 (n= between 117 – 220)





