



Waka Kotahi COVID-19 transport impact

Fieldwork waves 1-29 core report

18 November 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.

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COVID-19 transport impact

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Section 1 – About this research

Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

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

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

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

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

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

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

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

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

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

Overview of research (i)

Research design and outputs

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

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

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week.

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

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

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

1) Regular* overview power point report

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

2) [Open Data tables](#)

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

*For waves 1-14 fieldwork and reporting was undertaken weekly, for waves 15 and 16 fieldwork and reporting was undertaken bi-weekly, while wave 17 fieldwork and reporting was undertaken three 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 three weeks after wave 21. Waves 23-29 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 29 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 2020.
- At a total population level, significance testing indicated in this wave 29 report is based on a statistically significant shift of results between waves 1 to 29, 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	
2	Thursday 9 April to Tuesday 14 April	
3	Thursday 16 April to Monday 20 April	Alert level 4
4	Thursday 23 April to Sunday 26 April	
5	Thursday 30 April to Sunday 3 May	
6	Thursday 7 May to Sunday 10 May	Alert level 3
7	Thursday 14 May to Sunday 17 May	
8	Thursday 21 May to Sunday 24 May	
9	Thursday 28 May to Monday 1 June	Alert level 2
10	Thursday 4 June to Sunday 7 June	
11	Thursday 11 June to Sunday 14 June	
12	Thursday 18 June to Sunday 21 June	
13	Thursday 25 June to Sunday 28 June	Alert level 1
14	Thursday 2 July to Sunday 5 July	
15	Thursday 16 July to Sunday 19 July	
16	Thursday 30 July to Sunday 2 August	
17	Thursday 20 August to Sunday 23 August	Alert Level 3 (AKL) / Alert level 2 (Rest of NZ)
18	Thursday 27 August to Sunday 30 August	
19	Thursday 3 September to Sunday 6 September	Alert Level 2.5 (AKL) / Alert level 2 (Rest of NZ)
20	Thursday 17 September to Sunday 20 September	
21	Thursday 24 September to Sunday 27 September	Alert level 2 (AKL) / Alert level 1 (Rest of NZ)
22	Thursday 15 October to Sunday 18 October	Alert level 1
23	Thursday 12 November to Sunday 15 November	
24	Thursday 4 March to Monday 8 March*	Alert Level 3 (AKL) / Alert Level 2 (Rest of NZ)
25	Thursday 20 May to Monday 24 May	Alert level 1
26	Thursday 2 September to Monday 6 September**	Alert Level 4 (AKL) / Alert Level 3 (Rest of NZ)
27	Thursday 10 March to Monday 14 March 2022	Covid Protection Framework, Red light, phase 2
28	Thursday 26 May to Tuesday 31 May	Covid Protection Framework, Orange
29	Thursday 3 November to Tuesday 8 November	No restrictions on travel, Covid protection framework ended

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.

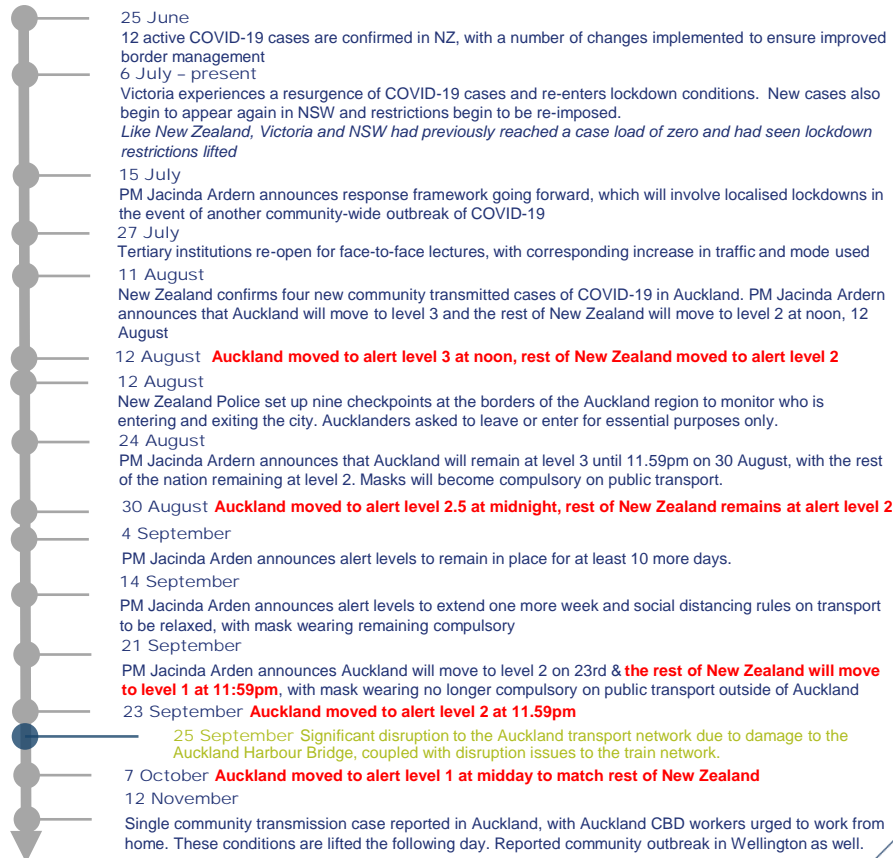
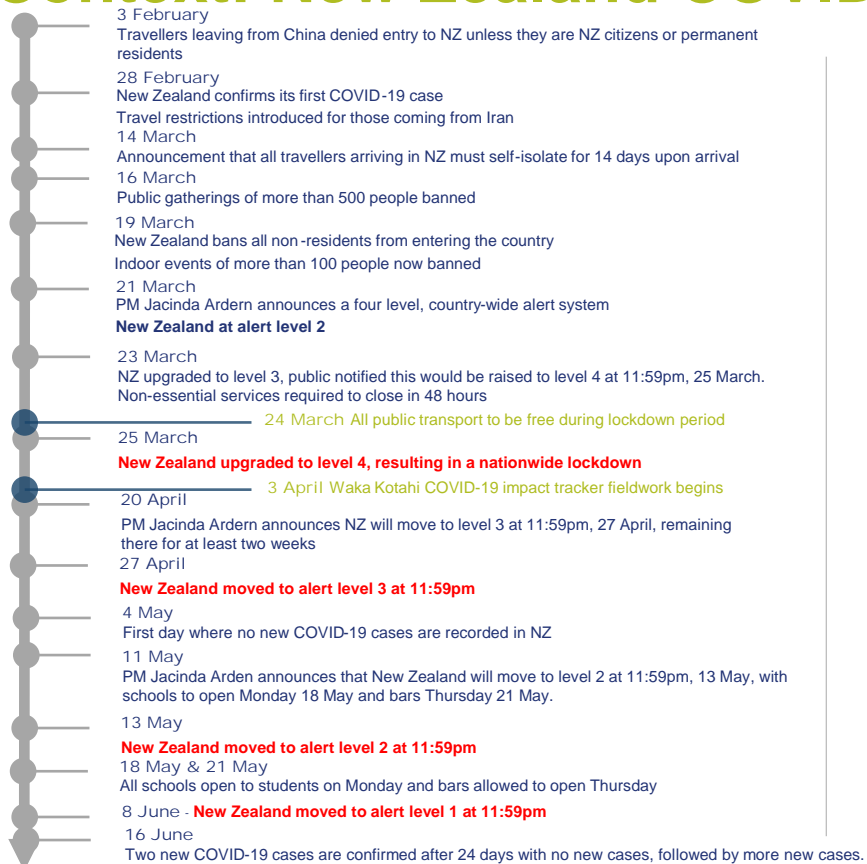
Sample structure and further definitions

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	5.5	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
Wave 28	Sample	n=1,223	n=329	n=83	n=100	n=165	n=101	n=83	n=362	n=164	n=303	n=186
	MOE*	2.80	5.4	10.76	9.8	7.63	9.75	10.76	5.15	7.65	5.63	7.19
Wave 29	Sample	n=1,233	n=311	n=100	n=100	n=177	n=100	n=100	n=345	n=180	n=310	n=169
	MOE*	2.79	5.56	9.8	9.8	7.37	9.8	9.8	5.28	7.3	5.57	7.54

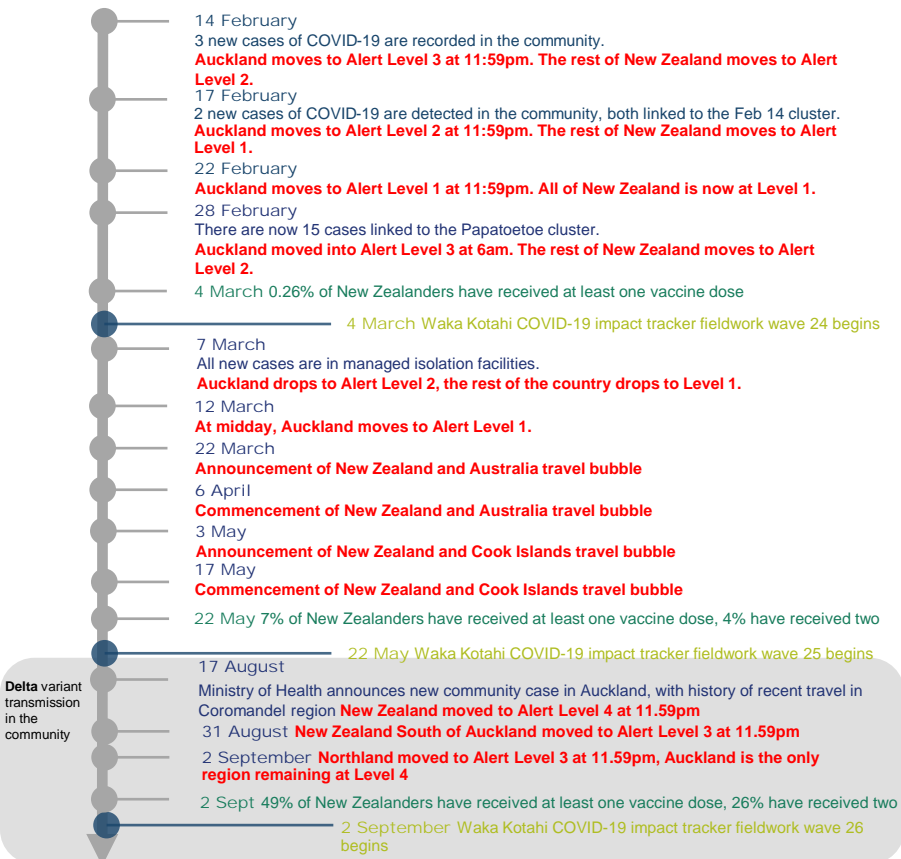
*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 Apr 12:44pm.

**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



Delta variant transmission in the community



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

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 13 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 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 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.

18 March

From 11.59pm unvaccinated NZ citizens and those eligible do not have to enter MIQ or self-isolation.

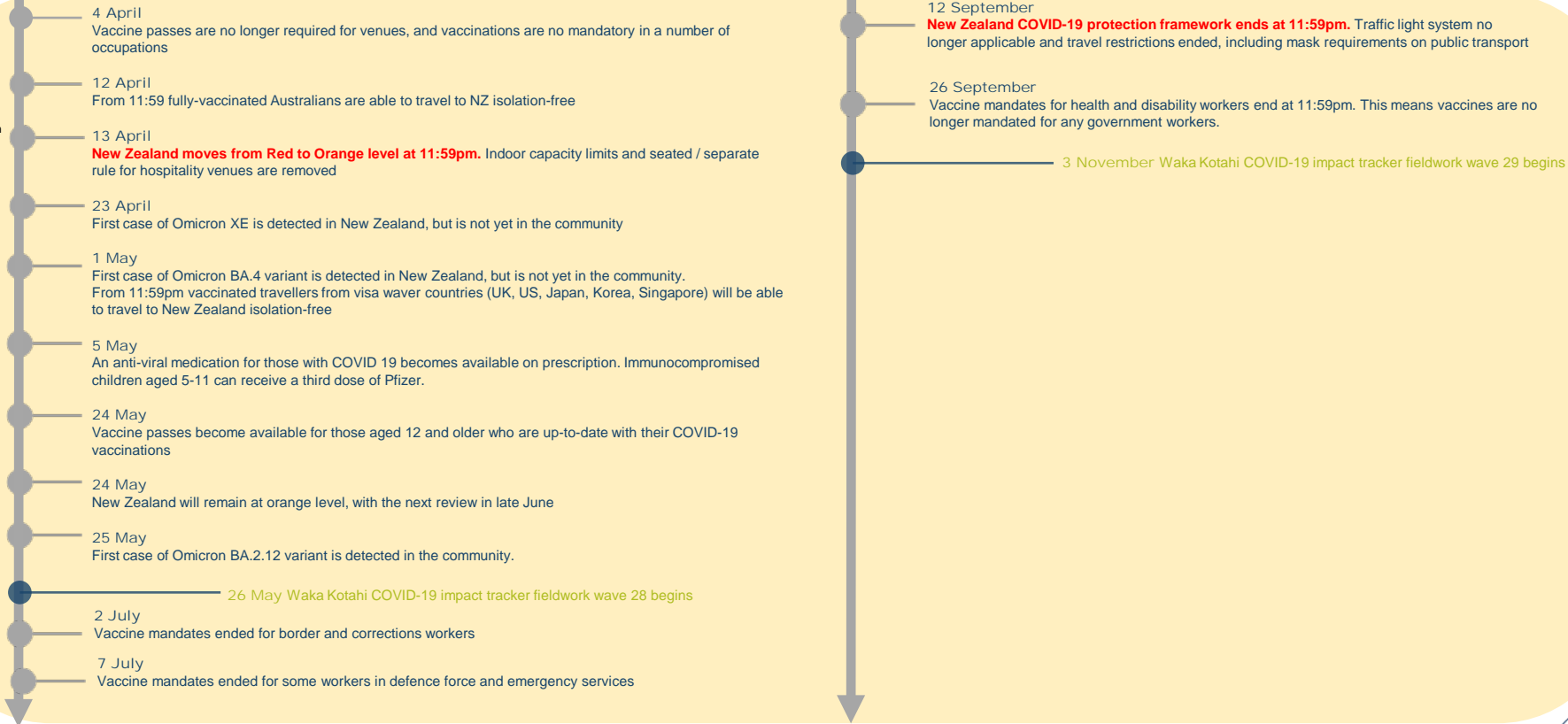
25 March

Limits on outdoor gatherings are removed, limits on indoor gatherings changed from 100 to 200. QR code scanning and signs are no longer required

Cumulative vaccination data sourced from health.govt.nz on 14/09/2021

Context: New Zealand COVID-19 timeline – 2022

Omicron variant transmission in the community



A woman wearing a blue jacket, a grey hat, and orange shoes is stepping out of the open door of a yellow and blue bus. She is carrying a patterned bag. The bus has a yellow upper section and a blue lower section. A sign on the side of the bus reads "EMERGENCY DOOR CONTROL: PUSH BUTTON TO OPEN. DO NOT USE HANDLE OF DOOR IF NECESSARY." The background shows a building and a clear sky.

Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1-29

Waka Kotahi COVID-19 transport impact tracker

Wave 29 was the first wave of the Waka Kotahi COVID-19 transport impact tracker to take place under no alert-level or protection framework settings, with all travel restrictions now removed within New Zealand.

Half of New Zealanders report having tested positive for COVID-19 since the outbreak with 5% saying they have tested positive more than once.

- With reports of continued waves of COVID, it isn't surprising that concerns about infection risks weren't significantly lower than May, although concern about transmitting to others has experienced a significant 5-point drop.
- This doesn't appear to be impacting concerns about travelling, with worries about leaving the home or difficulty getting to where they need to go being at historic lows.
- And although only 9% of people say their daily routines are disrupted at the moment, only 44% say their regular travel routines are no different to pre-pandemic times, indicating some lasting impacts on travel behaviours.

Although concerns haven't lessened, the proportion of NZers saying they are moving around normally is at an all time high, but self-isolation behaviours are still present for around 15% of the population.

- Among the 3% who are more strictly isolating, not leaving the house at all, it appears that half of these people are doing so out of habit and not concern over COVID, suggesting the norm is around 1.5% of the NZ population.
- When asked directly about permanent or long-term changes in travel behaviour, just over a two-thirds of NZers say they haven't made any, with this most prevalent among those already moving around as they normally would.

Journeys and mode usage continues to return to normal in terms of incidence, although frequency of journeys and mode usage are still not at pre-pandemic levels.


- Journeys to work increased again significantly, but are still 5-points below reported pre-COVID behaviour, while journeys to places of education are 3-points lower, but the school-run is virtually back to pre-COVID levels.
- This may reflect a 'new normal' with increased working from home and a smaller student population, influenced by things like a reduced volume of students on international visas.
- The number of weekly travellers by each mode is comparable to rates before March 2020, even for public transport. However, patronage figures show reduced activity on services.
- Those using PT services since tracking began have been doing so less often than pre-COVID. Even this month, the average bus user travels this way 2.8 days per week, compared to 3.23 days per week before COVID-19.

Whilst the proportion of New Zealanders using public transport is now back to pre-COVID levels, the majority are travelling less often than they did before COVID.

- This reduction is much less likely to be attributed to transmission concerns and more likely related to the life-changes that have occurred, such as working from home more often.
- Nonetheless, nearly a quarter say that transmission concerns keep them off services, and 12% are less comfortable now masks are no longer required.
- Reliability is now a more prevalent issue, with a significant increase in people saying services are not reliable enough for them to make use of and nearly a quarter saying they would use services more if they become more reliable.

At a total level, the proportion of people commuting for the majority of their work has increased, but not significantly, from May.

- Working New Zealanders are generally working on the same days as they did pre-COVID, with some reduction in the proportion working each weekday.
- With so much time elapsed since March 2020, it is likely that normal job changes and churn have an impact on this.
- However, among those working, the rate of working from home is 7-10 points higher than the claimed pre-COVID rate every day, with the exception being weekends.

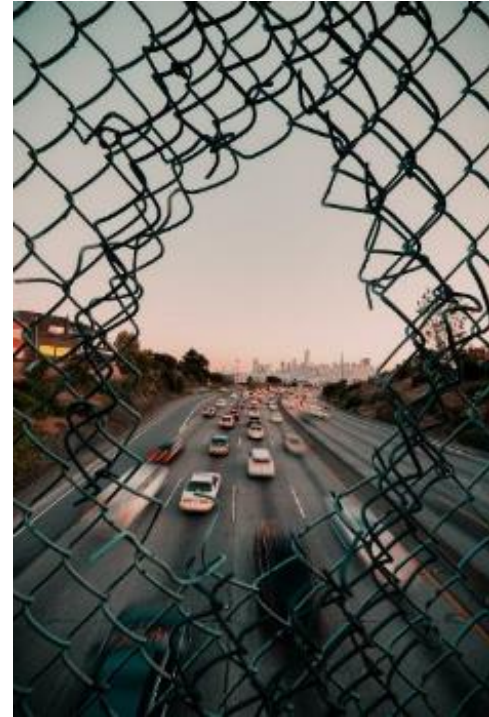


Section 3 – Context

Key findings – context

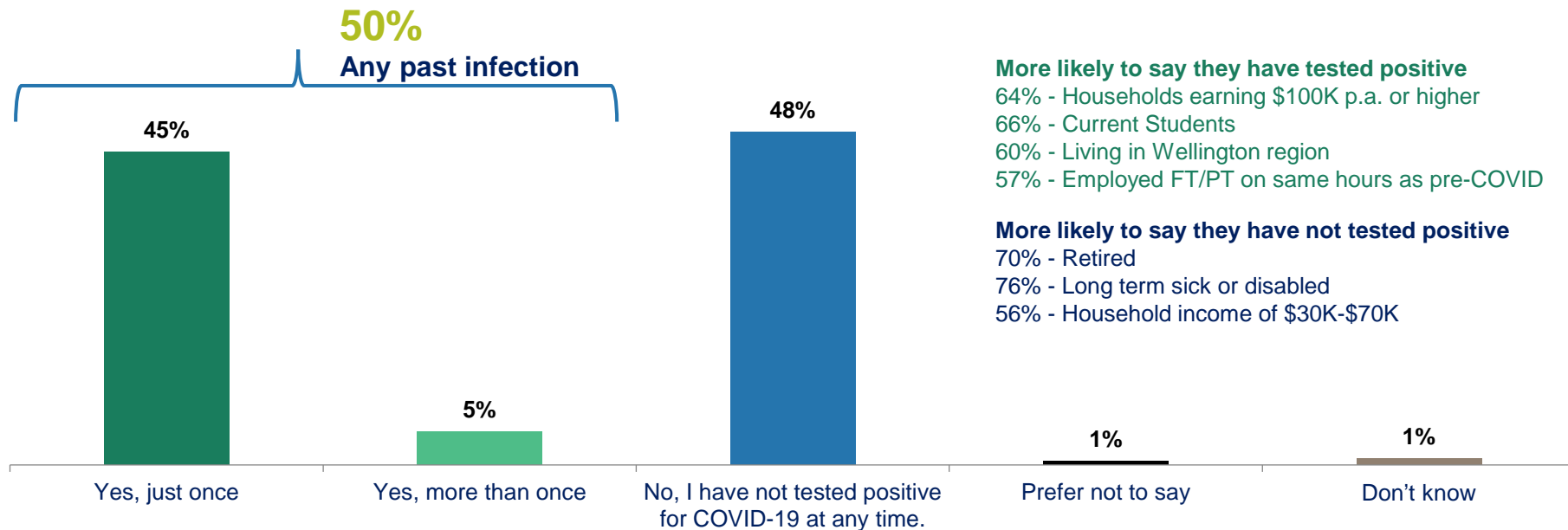
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- Understanding attitudes around COVID-19 provides the context in which journey and mode changes can be viewed. General fears and attitudes may work as external factors influencing the choices that New Zealanders make.
- The latest wave of fieldwork took place after the end of the COVID protection framework, with official restrictions around travel no longer in place. While COVID cases were on the rise, the number recorded in the community was lower than during the previous wave in May.
- However, within the survey sample, 5% reported a positive COVID test in the past week, with no real change from May. Half of those surveyed say they've tested positive for COVID at least once since March 2020.
- With restrictions lifted, concerns about infection risks were not significantly lower than in May, although concern about transmitting COVID to others was down a significant 5-points.
- New Zealanders were more likely to disagree that they worried about leaving the house than they have been since May 2021, under alert level 1 conditions. They were also just as likely to agree that they could easily get where they needed as in that period.
- Again, as in the last alert level 1 period in May 2021, the proportion agreeing that their daily travel routines were disrupted was down significantly to just 8% and the proportion agreeing they were travelling as normal was up significantly to 44%, also comparable to the 42% reported in May 2021.
- In all, attitudes and feelings about getting around seem comparable with May 2021, the most recent level 1 period, with New Zealanders just as confident and comfortable with travelling as normal.
- However, with COVID infection rates much higher than at this time, concerns about catching the virus were not similarly reduced. New Zealanders seem to be similarly wary about COVID infection risk, but not in a way that is limiting their ability to get around to a significant extent.



Half report that they have tested positive for COVID-19 at least once, workers and students are more likely to have a past positive test, with retired people less likely

Total reported past COVID-19 infection in population



QCOVID. And have you personally tested positive for COVID-19 at any time since March 2020?

Base: all adults 15+ in New Zealand – Nov3 to Nov8 2022



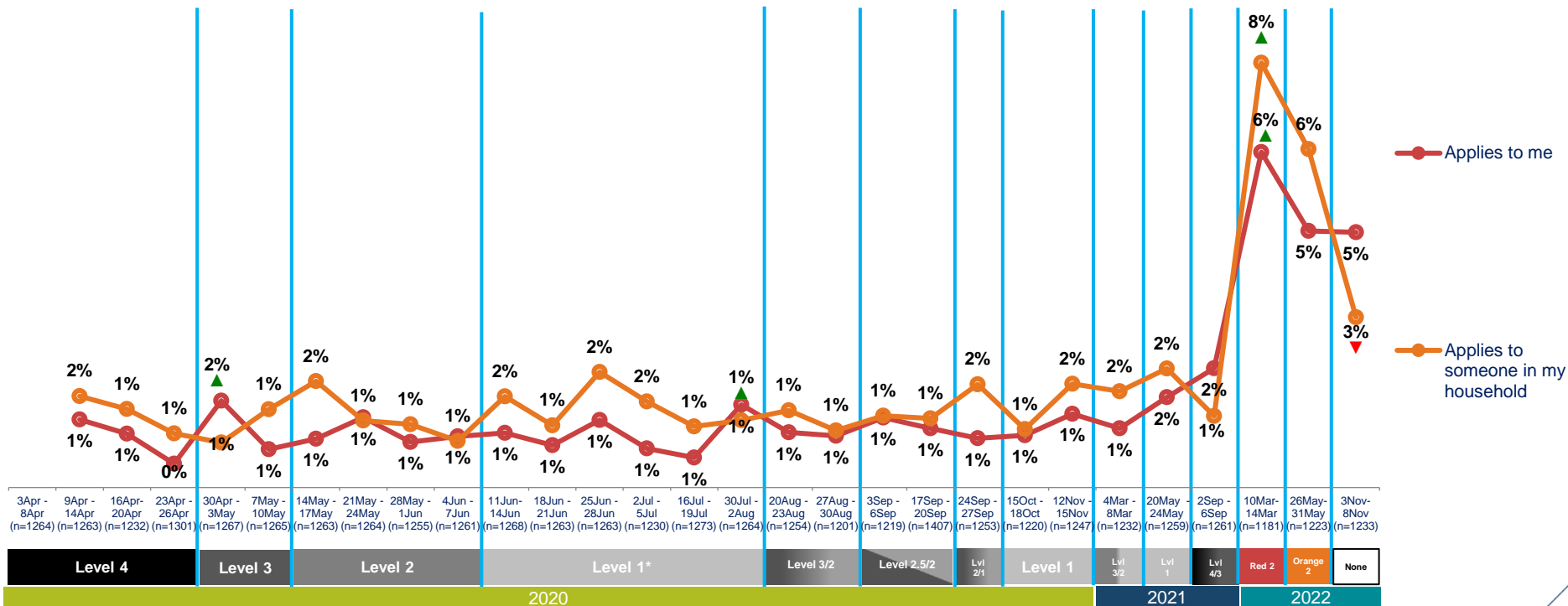
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The proportion of New Zealanders who say they've tested positive in the past week is unchanged from May; it has been consistently higher in 2022 than in previous years

Past week rates of COVID-19 in households



QVULN. Which, if any of the following best describes the health of people in your household last week? - Sick with diagnosed COVID-19 or suspected COVID-19

Base: all adults 15+ in New Zealand



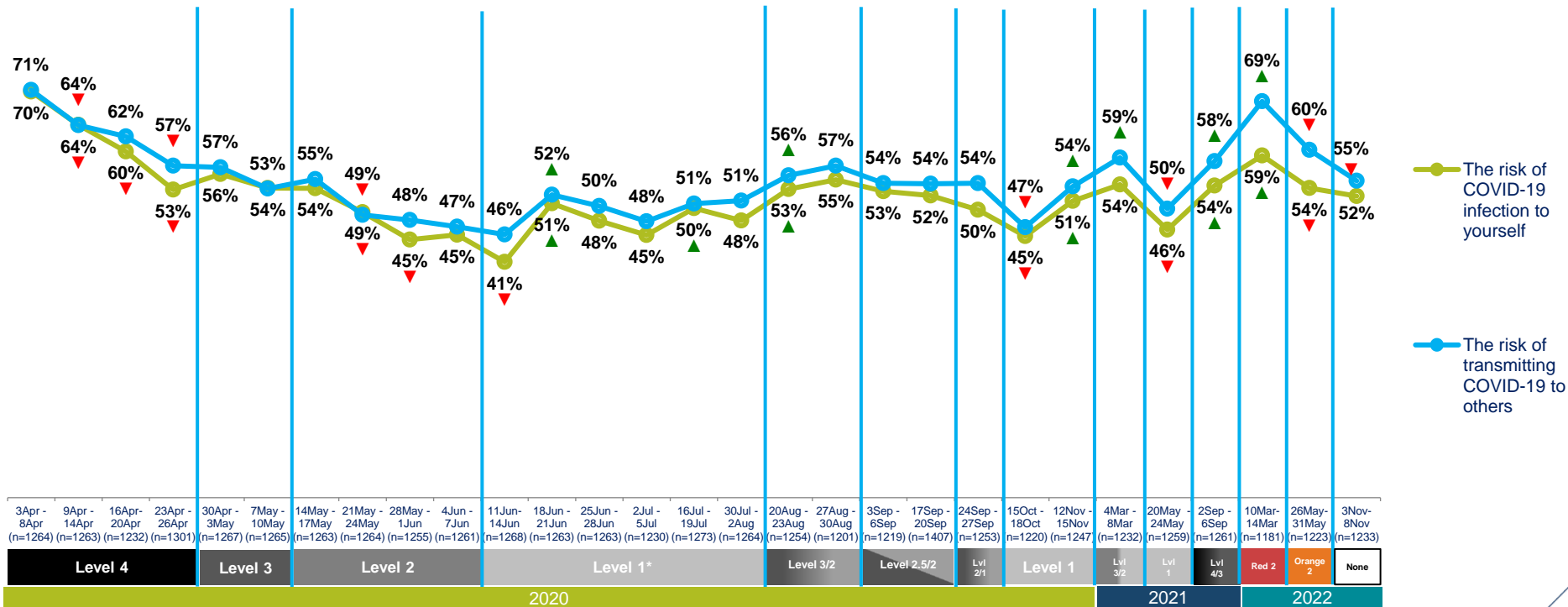
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Concern about COVID infection risk has not significantly decreased compared to March and remains higher than at the start of June 2020, under alert level 1

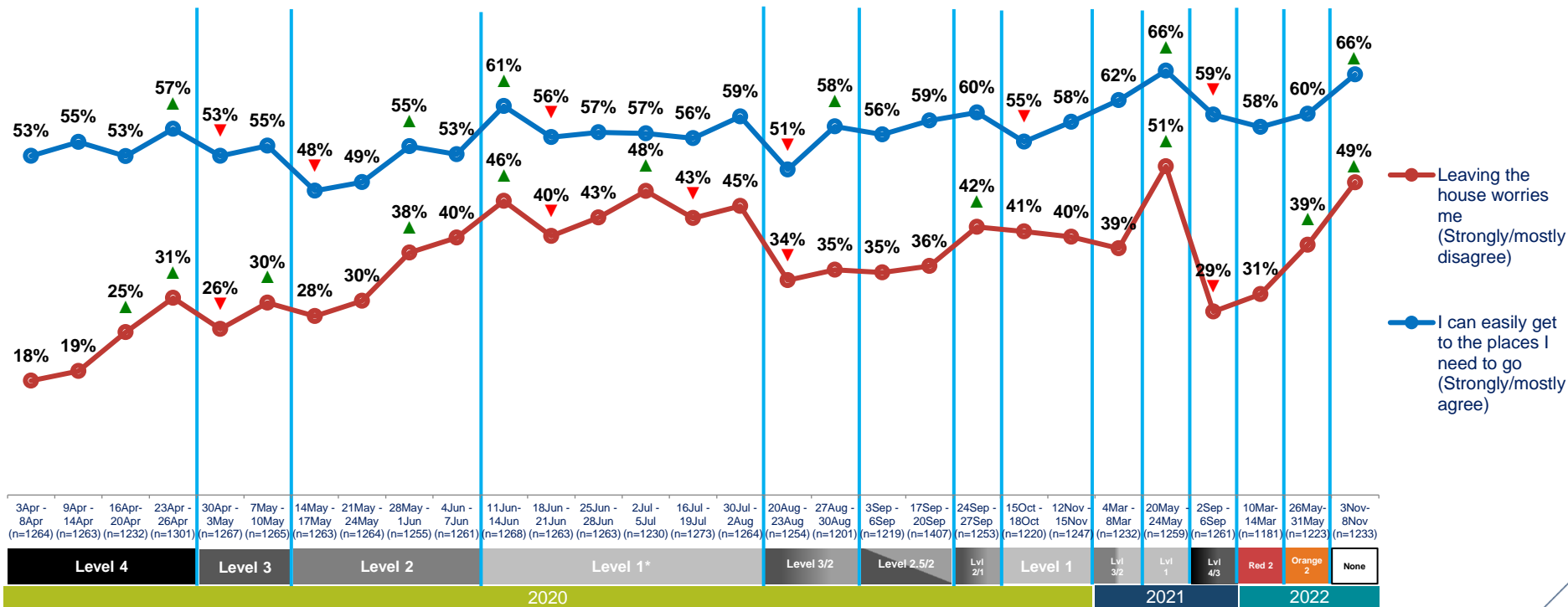
COVID-19 concerns (NETT all concerned)



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

Two thirds of New Zealanders now feel free to go where they need to go and half are not worried about getting out of the house, comparable with alert level 1 conditions

COVID-19 attitudes



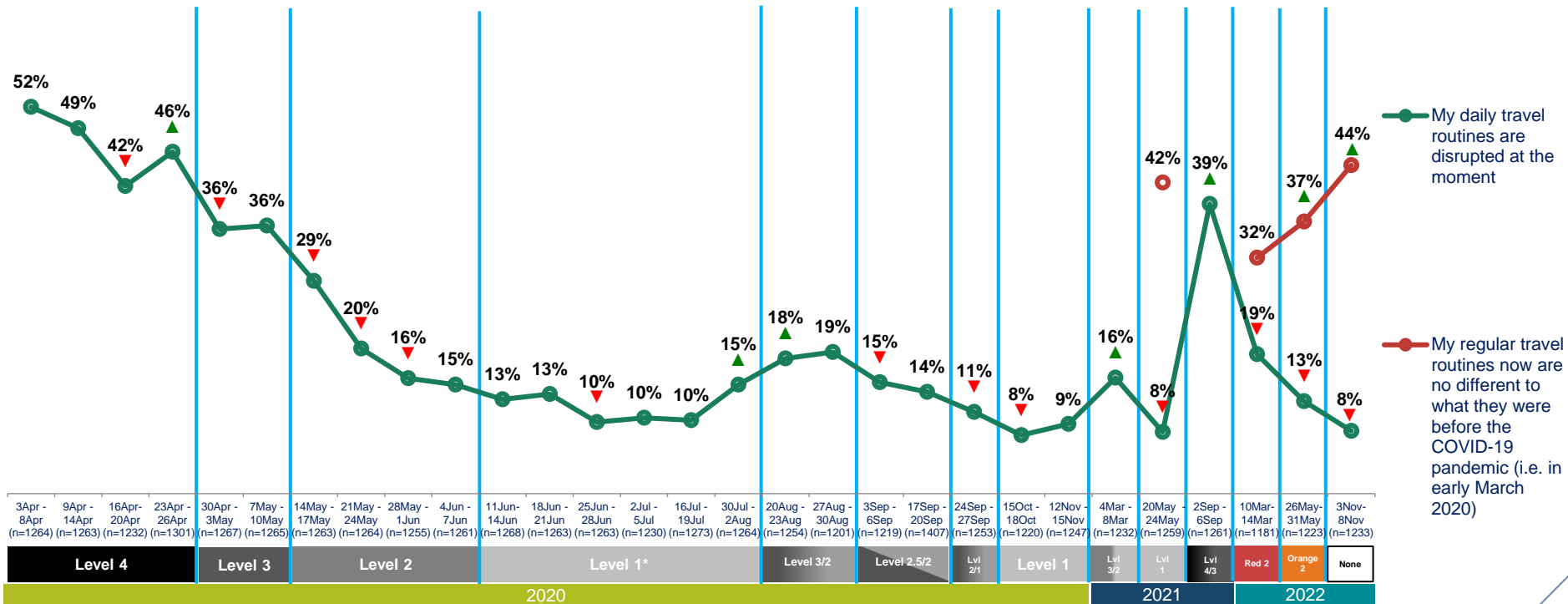
QPTUSE3. How personally concerned are you about each of the following?

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



The proportion with travel routines similar to pre-COVID has increased significantly again, but it still remains below 50%

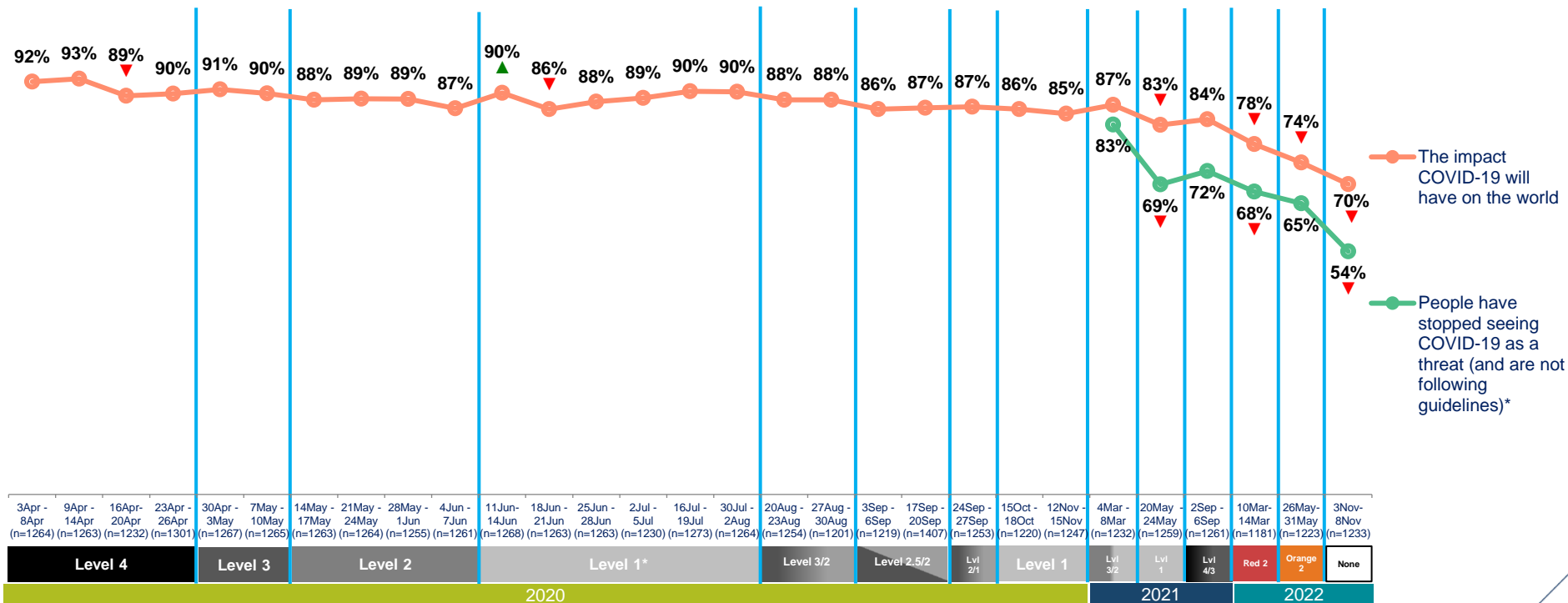
COVID-19 disruption (all strongly/mainly agree)



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

There is significantly less concern about complacency in others than there was in May and concerns about wider global impact continue to decline

COVID-19 concerns (NETT all concerned)



QPTUSE3. How personally concerned are you about each of the following? * "and are not following guidelines" phrasing removed in w29 (Nov 2022)

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



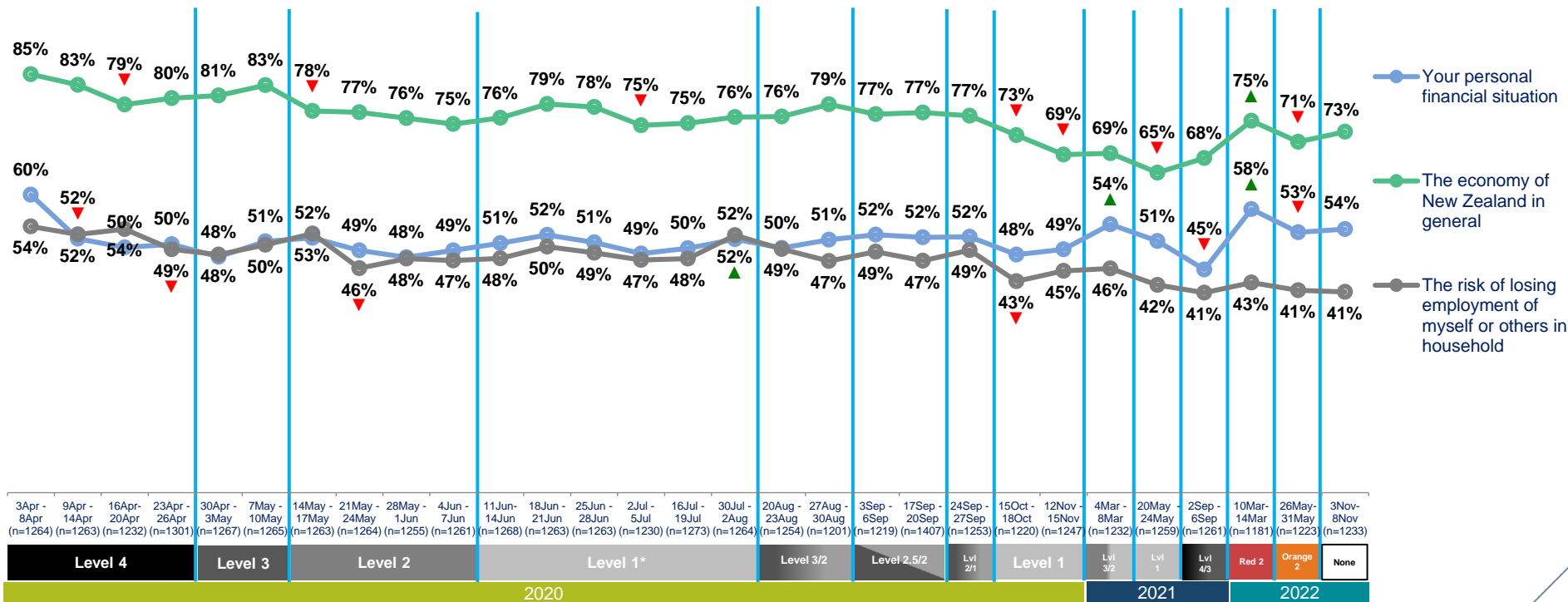
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Economic concerns have also declined significantly since March and remained stable since May, concerns about employment continue to remain low

Economic concerns (NETT all concerned)



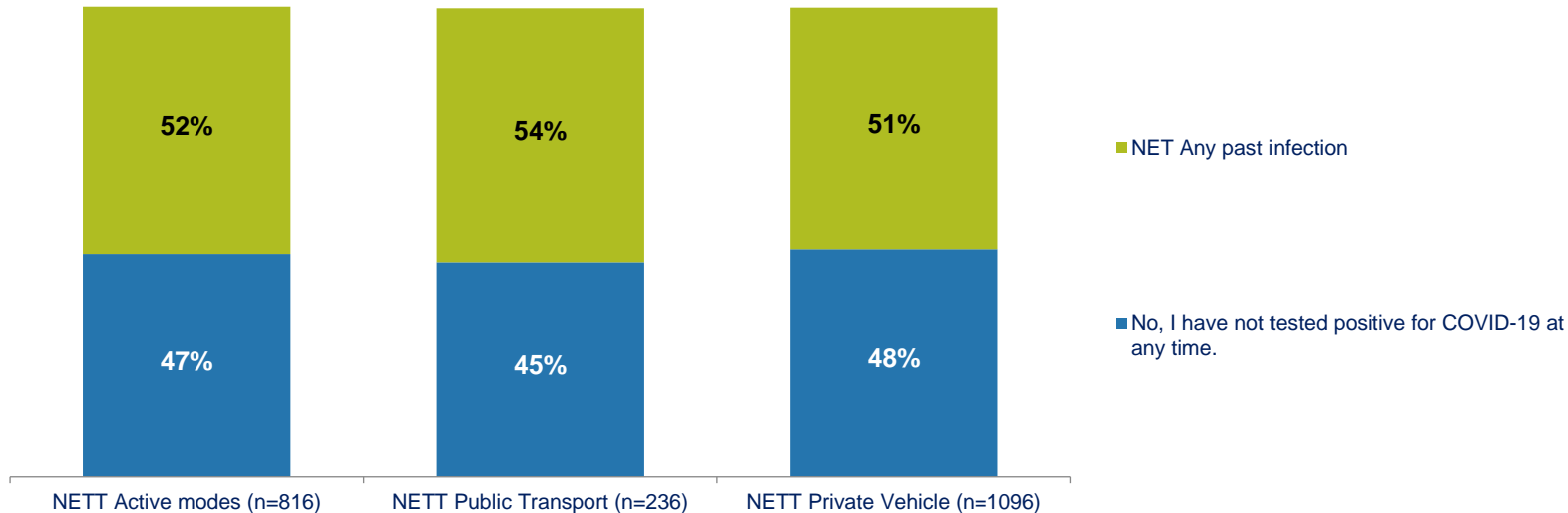
QPTUSE3. How personally concerned are you about each of the following?

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




Reported past positive tests are slightly higher among past-week PT users, but not to a significant extent

Total reported past COVID-19 infection by past week mode use



QCOVID. And have you personally tested positive for COVID-19 at any time since March 2020?

Base: past week users of each mode 15+ in New Zealand – Nov 3 to Nov 8 2022



Section 4 – Behaviours

Key findings – behaviours

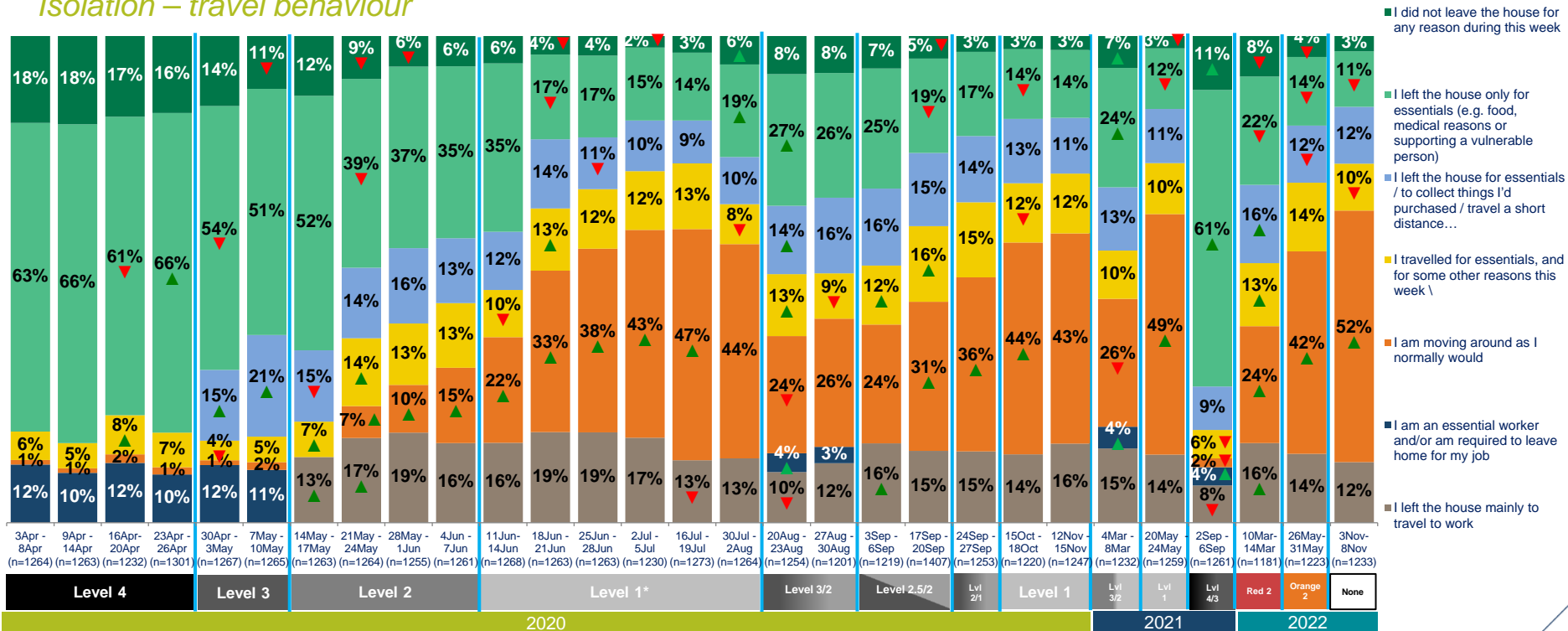
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- In light of changing attitudes and concerns around COVID-19 in the country, New Zealanders may change their behaviour in different ways to adapt to their situation. This includes moderating the amount of weekly travel undertaken or taking certain steps to protect oneself in transit, such as wearing masks.
- With the COVID-19 protection framework now concluded, rates of self isolation are now minimal. Again, this was comparable with May 2021, the latest alert level 1 period.
 - At this point, just over half of those completely self isolating are doing so due to some COVID-related reason, and the majority of this was stated as exercising caution in order to minimise risk
 - Just over half a percent of the total population reported self isolation in the past seven days as a result of a positive test.
- While 52% say they are travelling around as normal, the highest proportion recorded to date, this may be a 'new normal' in many cases. More than a quarter of people say they've made permanent or long term changes to their travel. These generally include:
 - Increased working from home impacting bus and train travel in particular
 - Some increased caution around certain trips, such as those to the supermarket, particularly among those reporting past week self-isolation
 - Varied categories of mode switching, not just into cars, but with some reporting increased active mode and public transport usage, often driven by environmental concerns
 - Reductions in recreational and leisure travel, particularly flying for big holidays abroad.



Self isolation behaviour is now as rare as in May 2021. The proportion who say they are moving around as normal is now at the highest level recorded to date

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



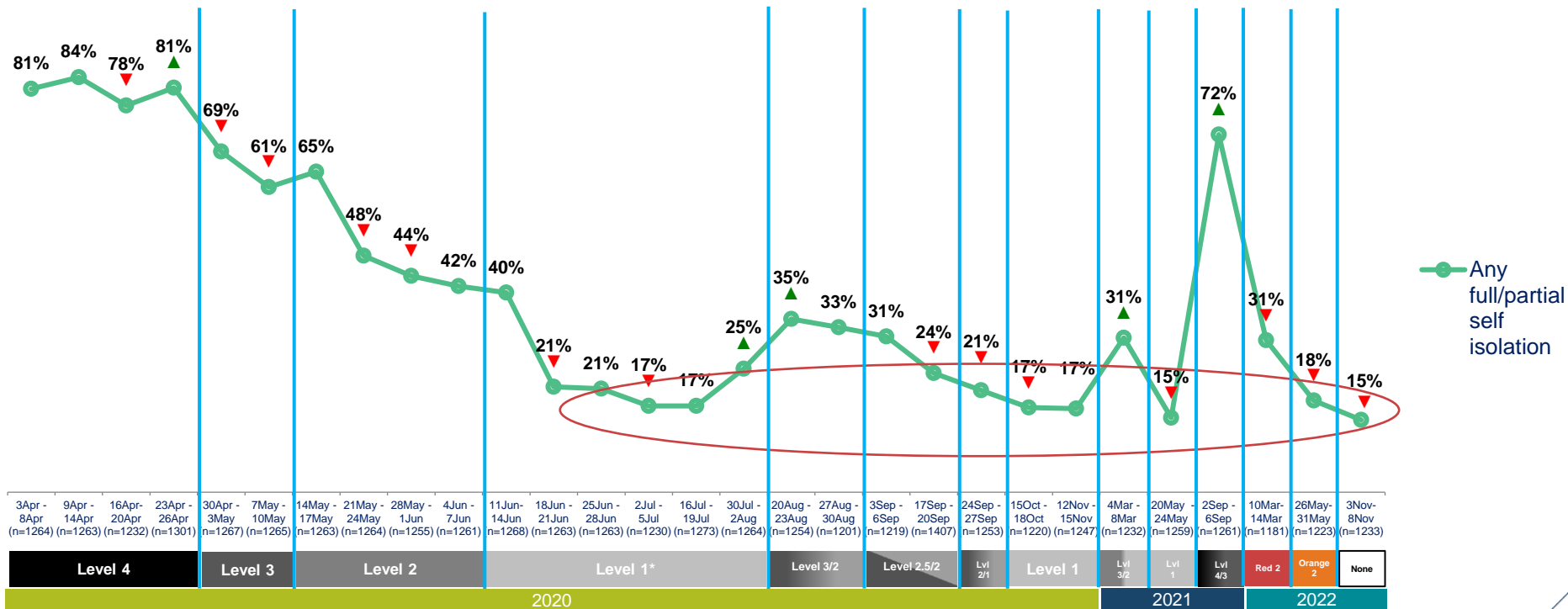
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Even with a further significant decline in self-isolation, it is no less common than under alert level 1, which may suggest continuing caution, or part of normal behaviour

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



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

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



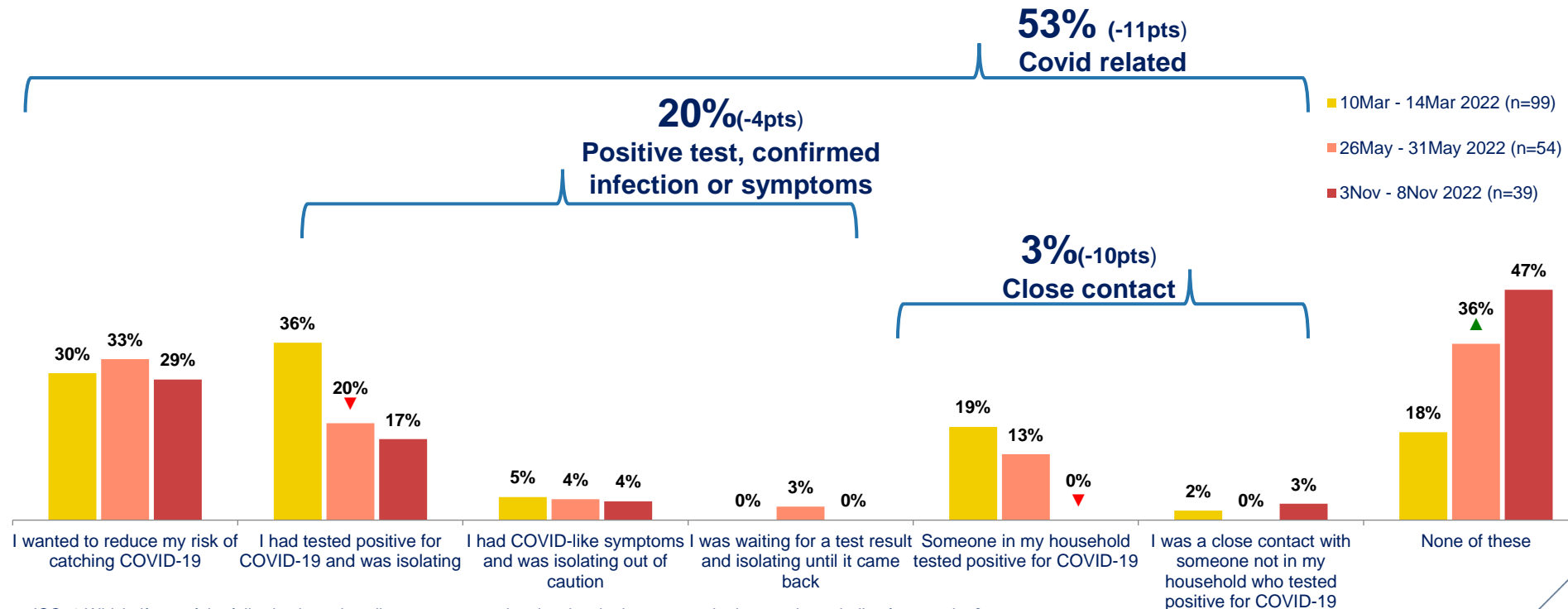
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

More than half of strict self isolation is attributable to COVID, with attempts to reduce risk the most common reason and positive tests/close contacts in decline

Reasons for self-isolation



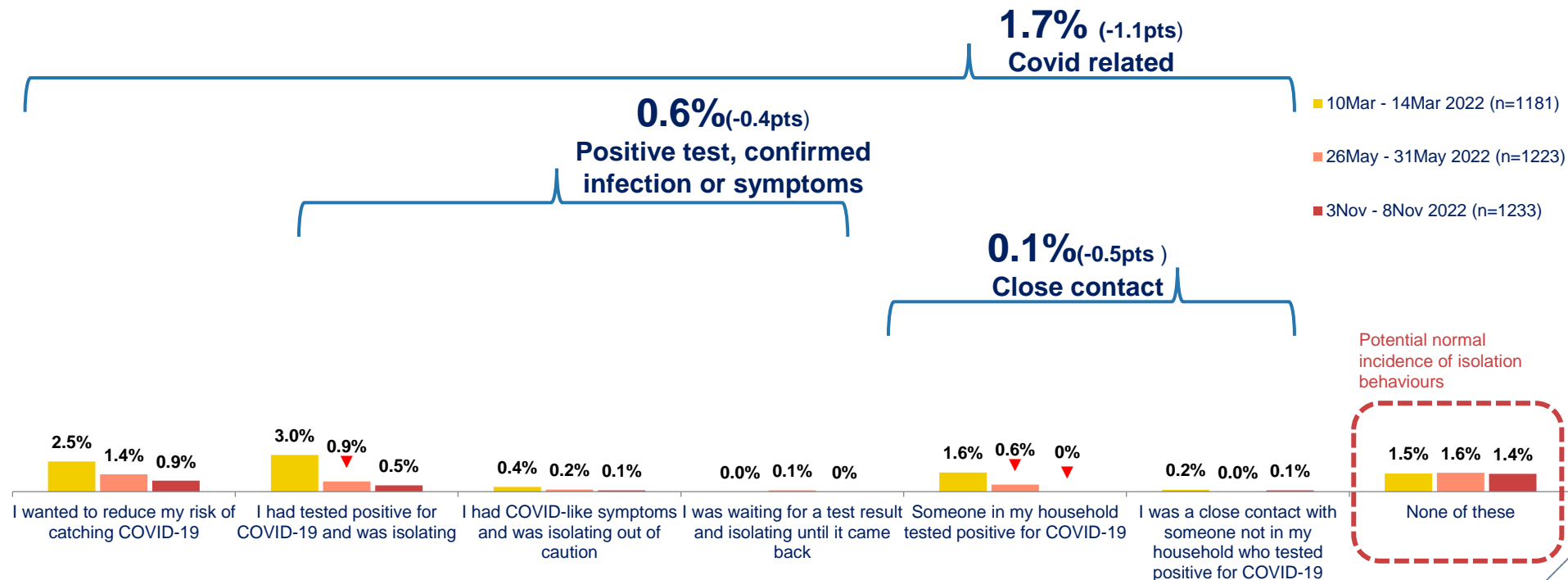
ISO_2 Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

Base: all adults 15+ in New Zealand self isolating during preceding week, Mar 10-14 (n=99); May 26-31 (n=54)



The proportion isolating for non-COVID reasons remains consistent, with COVID related isolation now under 2% within the total population

Reasons for self-isolation – as a share of total population



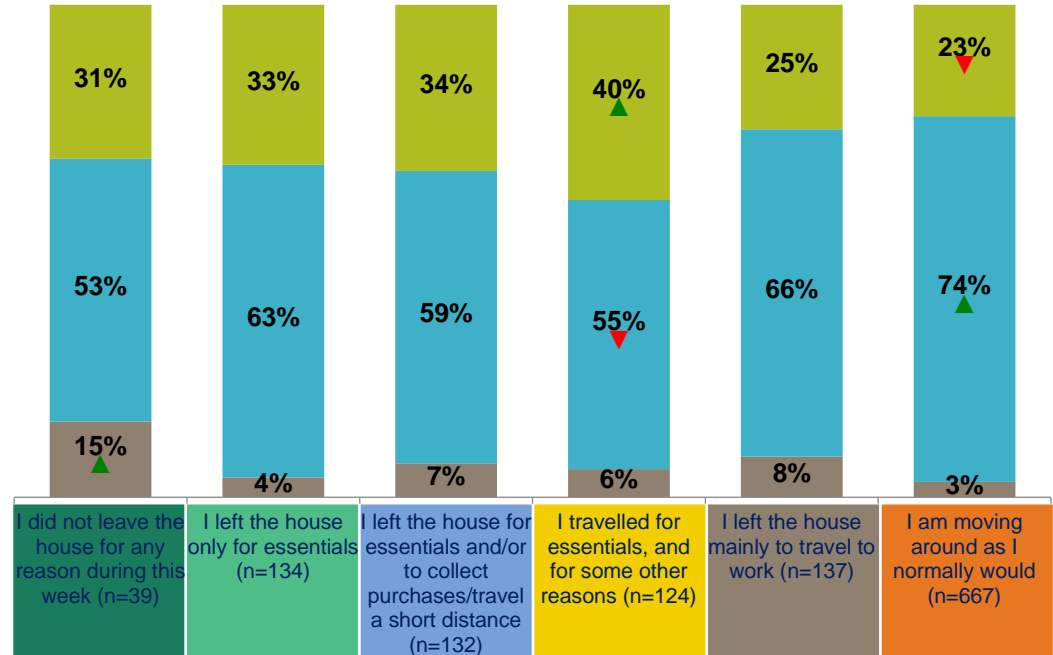
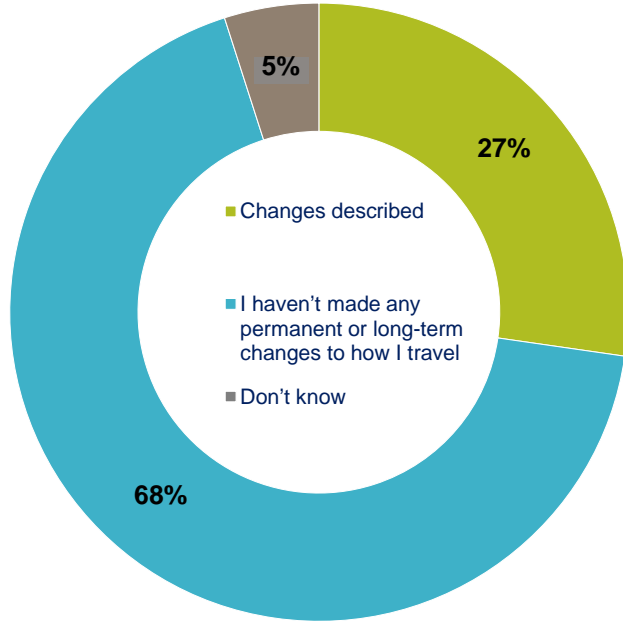
ISO_2 Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

Base: all adults 15+ in New Zealand, Mar 10-14 (n=1,181); May 26-31 (n=1,223)



When asked about long term changes to travel behaviour, under a quarter described doing so, with those 'moving as normal' least likely to have made long term changes

Changes to travel



QPTUSE3. Thinking of how you travelled before COVID-19 in March 2020 and how you travel now, please describe any permanent or long-term changes that you have made to the way you get around?
Base: all adults 15+ in New Zealand

Many self-isolating describe caution around where they go, but not all changes are COVID influenced and some mode switching is prominent, including to active modes

Changes to travel patterns – all fully or partially self isolating

“Since COVID started I only go out once a week. If I have had to visit a Dr. or get my car checked that may mean a few times I have gone out twice in a week” – Did not leave house in past week

“I no longer visit the shops etc. and try to stay away from others” – Did not leave house in past week

“Changed bus routes to a less busy one. No longer travel in weekends out of region. No longer travel further within NZ by car or plane for holidays” – Left the house only for essentials

“Travelled by car when every need to go for medical or shopping using masks all the time and handwashing when ever going out and coming home” – Left the house only for essentials

“I work from home 5 days a week, I only travel if it is to attend a Dr appointment” – Left the house only for essentials

“Less use of public transport, not because of COVID but because it is completely unreliable during peak hours in Wellington” – Left the house only for essentials

“We usually travel overseas once or twice a year, I have not travelled overseas since and will not this year either” – Did not leave house in past week

“I now take an uber as opposed to taking the bus anywhere now. And only drive in the weekends.” – Did not leave house in past week

“I drive around a lot more with people in my car.” – Did not leave house in past week

“I keep to myself as much as I can and go with my own vehicle once COVID is gone will be able to do some longer distance travel.” – Left the house only for essentials

“I buy most things online.” – Left the house only for essentials

“I walk most places now. Buy and always wear my mask.” – Left the house only for essentials

“I have invested in a scooter with a different range to enable me to make 90% of my travel requirements as carbon neutral as possible” – Left the house only for essentials

QCHANGE. Thinking of how you travelled before COVID-19 in March 2020 and how you travel now, please describe any permanent or long-term changes that you have made to the way you get around?
Base: all adults 15+ in New Zealand who were fully or partially self-isolating in the past week

Those making a limited number of journeys describe a fair amount of mode switching from PT, but COVID is far from being the only factor

Changes to travel patterns – all travelling mainly for essentials, with some other trips

“Don't use public transport nearly as much as I no longer travel to work” – Left house for essentials, to collect purchase, travel short distance

“I would normally take bus/train but I find it more easier to catch Ubers”
– Left house for essentials, to collect purchase, travel short distance

“Dubious about staying overnight in motel, hotel etc as one does not know about previous people who may have COVID. Travel is not worth the risks.” – Left house for essentials, to collect purchase, travel short distance

“Using car as main mode of transport now due to major health decline. However, I only go out if absolutely necessary and do more online / delivered shopping since pandemic started.” – Left house for essentials, to collect purchase, travel short distance

“I take taxis more because the government has made it cheaper to travel.” – Left house for essentials, to collect purchase, travel short distance

“Prefer the safety of driving, instead of being in public on bus” – Left house for essentials, to collect purchase, travel short distance

“I've actually gotten rid of my car. I use my sons if I need to and walk the other times. For the earth's recovery.” – Left house for essentials, to collect purchase, travel short distance

“I work more from home. Travel to office has reduced from 3 times a week to none. Travels by flight within NZ have halved in frequency from 6-8 times a year. Travel international has almost stopped.” – Travelled for essentials and some other reasons

“I now don't offer rides into town to people I don't know as before COVID I would always ask people if they need a ride.” – Travelled for essentials and some other reasons

“No longer do a major supermarket shop during the week. A family member does it for me..” – Travelled for essentials and some other reasons

“Less travel due to cost of petrol.” – Travelled for essentials and some other reasons

“I tend to plan my outings from home so that I compact as much activity together for my trip.” – Travelled for essentials and some other reasons

QCHANGE. Thinking of how you travelled before Covid-19 in March 2020 and how you travel now, please describe any permanent or long-term changes that you have made to the way you get around?
Base: all adults 15+ in New Zealand who travelled only for essentials, collecting purchases, travelling short distances or some other reasons in past week

Those travelling for work or as normal describe some reduced travel and mode shift. While some are using PT less, some have adopted trains, buses and active modes

Changes to travel patterns – travelling for work, or as normal

“Walk to school and pick up kids and drop off. Bike or scooter to work, using my car for shopping.” – Left house mainly to travel to work

“Probably travelling less for work using Microsoft teams instead” – Left house mainly to travel to work

“I am an essential worker, travel has not changed for me.” – Left house mainly to travel to work

“The only thing is I try to do dropping/picking up kids, grocery shopping and going to work and back again all in the same way so there isn't too much running around.” – Left house mainly to travel to work

“Travel less, everything is too expensive.” – Left house mainly to travel to work

“Now that the COVID restrictions have been lifted where I live, it is almost back to normal living conditions. But mask wearing was something that was difficult to get use to.” – Left house mainly to travel to work

“Purchased a hybrid car. Shifted house and now use the train.” – Left house mainly to travel to work

“I used to catch the bus, now drive by car to work - this is only due to moving houses not Covid-19.” – Moving around as normal

“Retirement into motorhome in which we live & travel throughout New Zealand” – Moving around as normal

“More use of e-bike and public transport” – Moving around as normal

“No longer own a car, use a bike to travel to work, use public transport” – Moving around as normal


“Get the train into Wellington less and drive in more. Now drive to Upper Hutt once a week to care for granddaughter” – Moving around as normal

“...only...because I moved ...to Christchurch in June 2020. I used to get the train to work in Wellington and now I drive or walk as I only work 2.5kms from home” – Moving around as normal

“Occasionally catch bus as 1/2 price fares” – Moving around as normal

“I'm more active now, walking and cycling.” – Moving around as normal

QCHANGE. Thinking of how you travelled before Covid-19 in March 2020 and how you travel now, please describe any permanent or long-term changes that you have made to the way you get around?
Base: all adults 15+ in New Zealand who travelled mainly for work or say they are moving around as they normally do

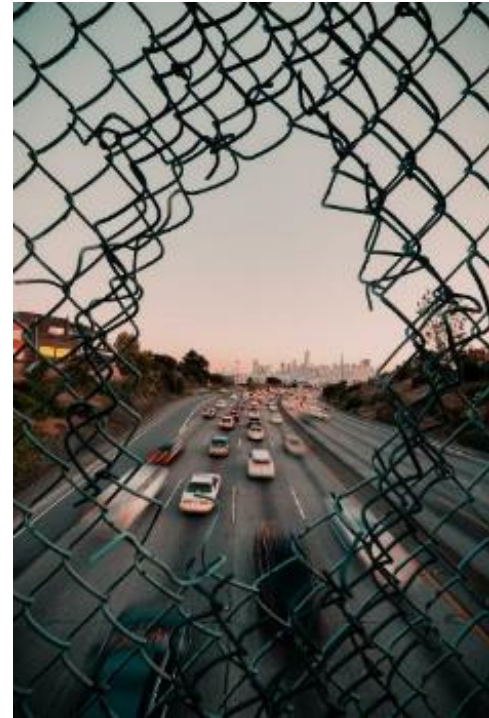


Section 5 – Journeys and mode usage

Key findings – local and domestic journeys

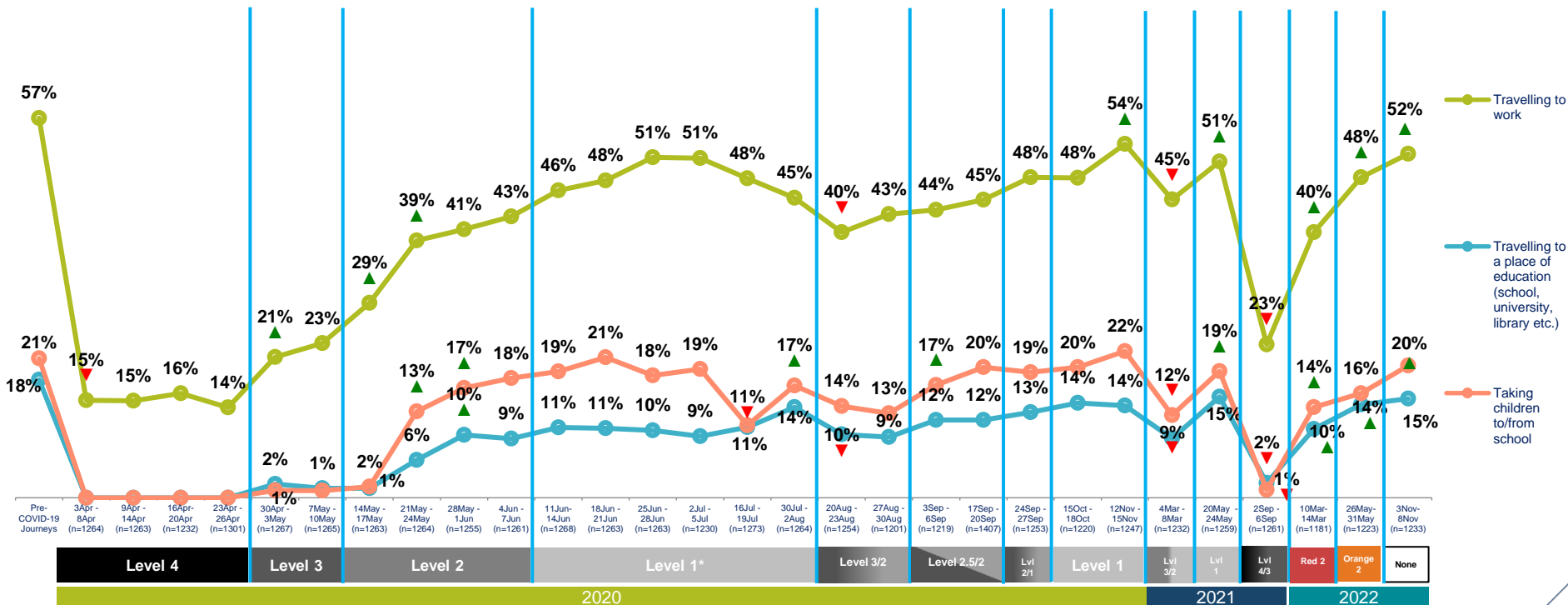
Waka Kotahi objective – how is travel changing?

- 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.
- Following the conclusion of the protection framework, certain forms of essential travel appear to be occurring at pre-COVID incidences. Journeys to take children to and from school are reported at the same rate as in the pre-COVID benchmark.
 - Journeys to work increased again significantly, but are still 5-points below reported pre-COVID behaviour, whilst journeys to places of education are 3-points lower.
 - This may reflect a 'new normal' with increased working from home and a smaller student population, influenced by things like a reduced volume of students on international visas.
- The number of weekly travellers by each mode is comparable to rates before March 2020, even for public transport. However, patronage figures show reduced activity on services.
 - Those using services since tracking began have been doing so less often than pre-COVID. Even this month, the average bus user travels this way 2.8 days per week, compared to 3.23 days per week before COVID-19.
 - Comparatively, whenever restrictions have been at a low level (level 1, orange or as now, lifted), motorists tend to drive 4.8 days per week, roughly as often as they did before COVID-19.
 - To date, New Zealanders have not reported as many days walking, on average, as they might have before March 2020.



While not at pre-pandemic levels, the proportion travelling to work in the past week is at the highest level since November 2020, with school-runs back to normal

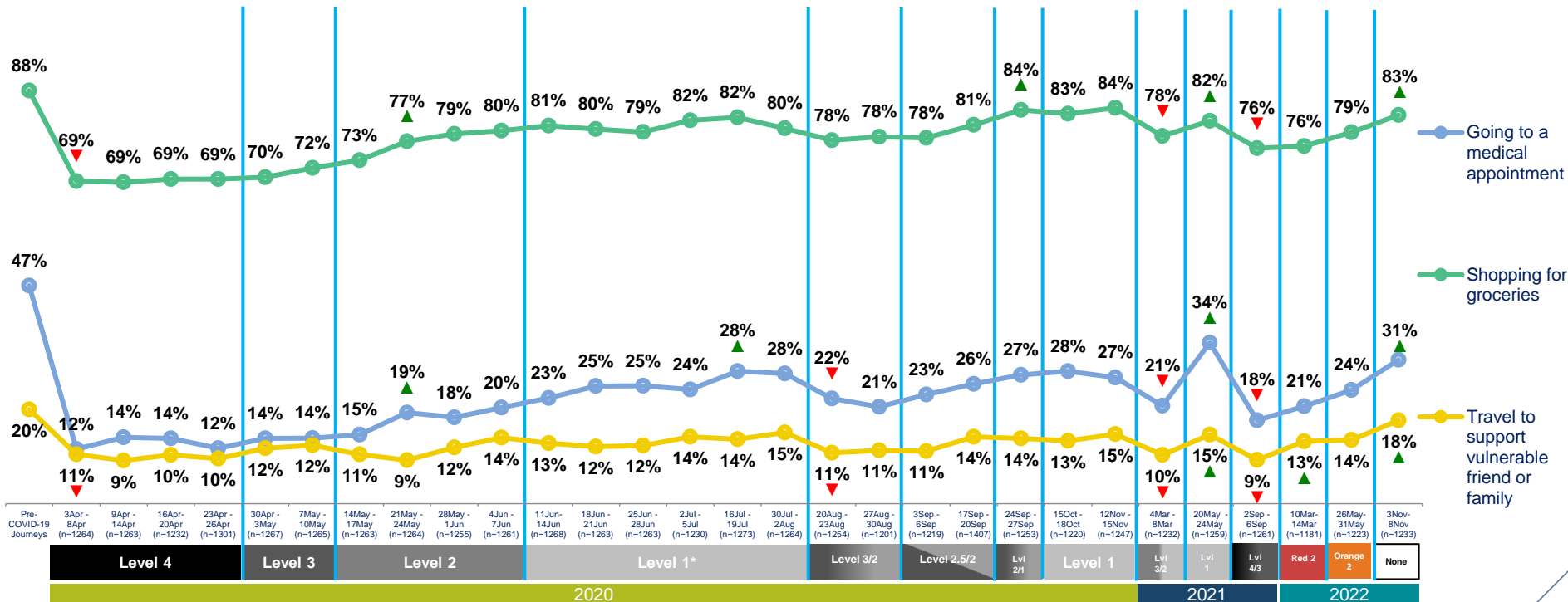
Frequent essential journeys



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 1-29 (n= between 1,181 – 1,407)

Journeys to support vulnerable friends and family are also closer to pre-COVID levels than before

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 1-29 (n= between 1,181 – 1,407)



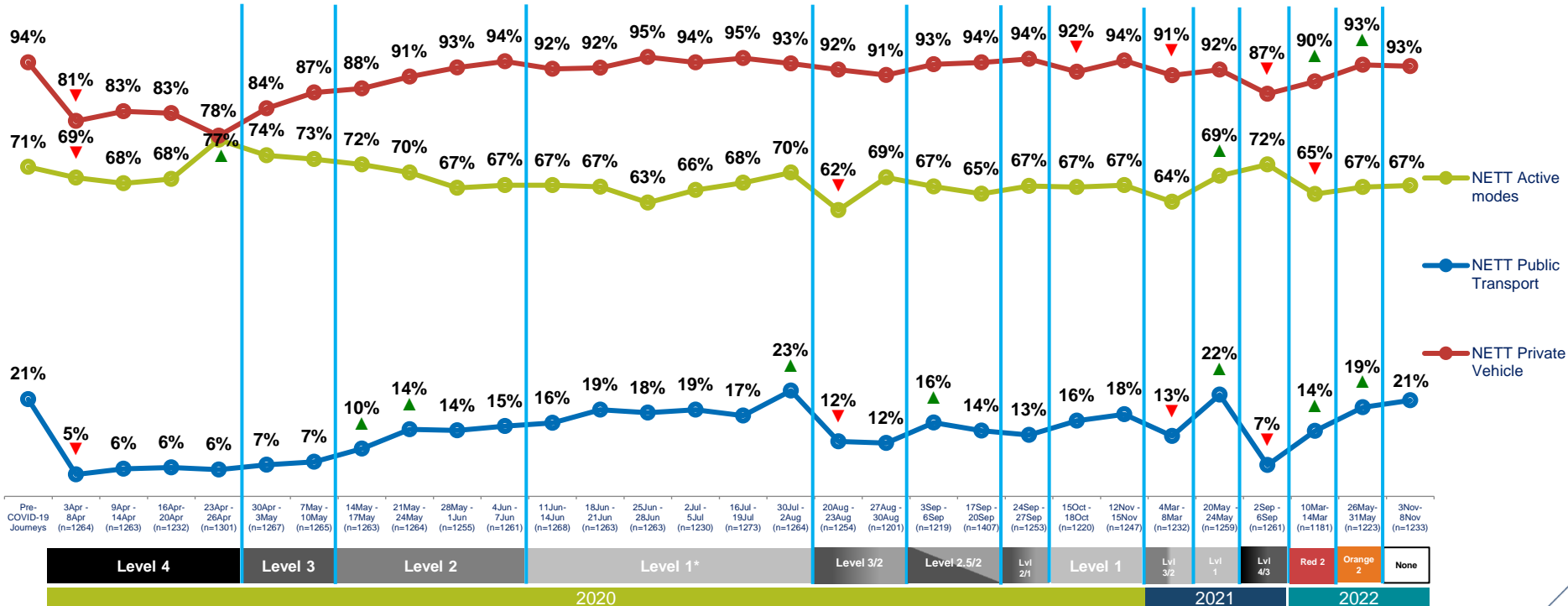
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The proportion reporting public transport usage in the past week is the same as the pre-COVID benchmark, suggesting a normal number of users on the PT network

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 1-29 (n= between 1,181 – 1,407)



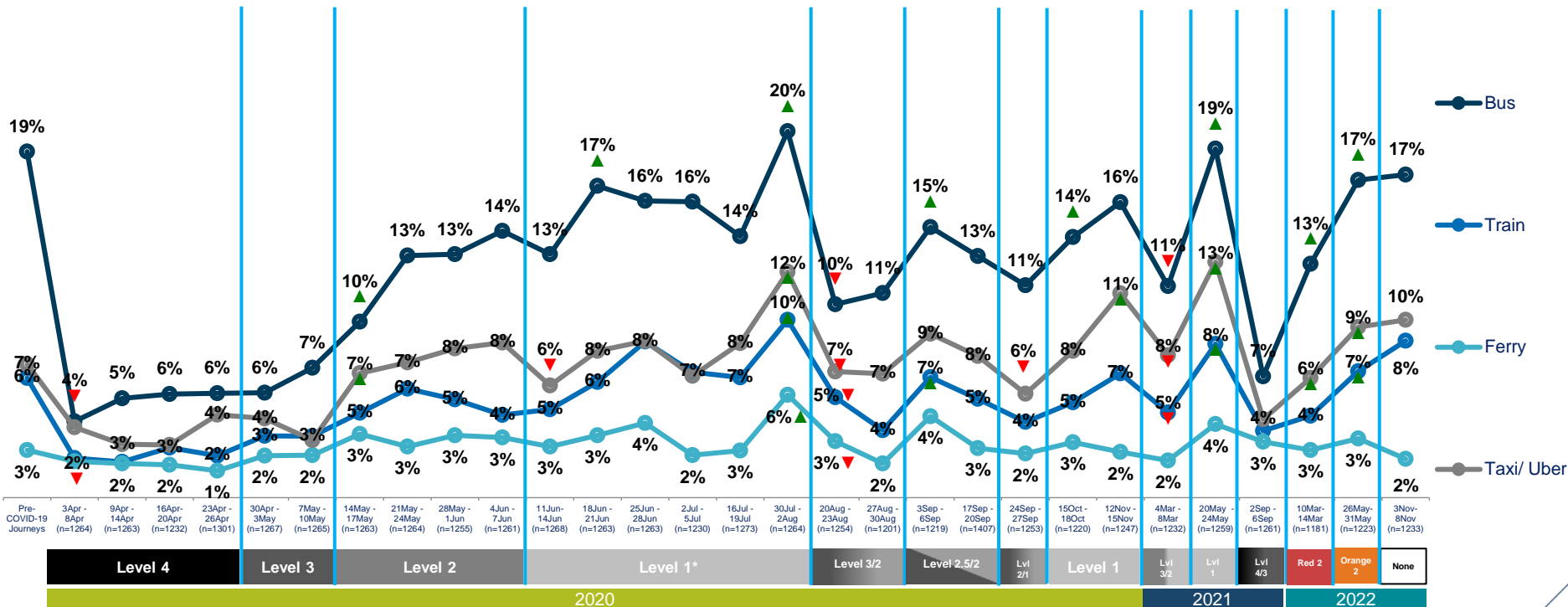
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Reported weekly train and taxi usage this month was higher than pre-COVID, with buses and ferries a little below pre-COVID levels

Changes in mode usage by wave – PT



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 1-29 (n= between 1,181 – 1,407)



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

With a few exceptions, those still using buses and trains each week consistently report using these modes on fewer days than in the pre-COVID benchmark

Bus and train frequency over time: among users



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

Base: all adults 15+ in New Zealand in who used each mode in the past week: Wave 1-29 (n= between 1,181 – 1,407)



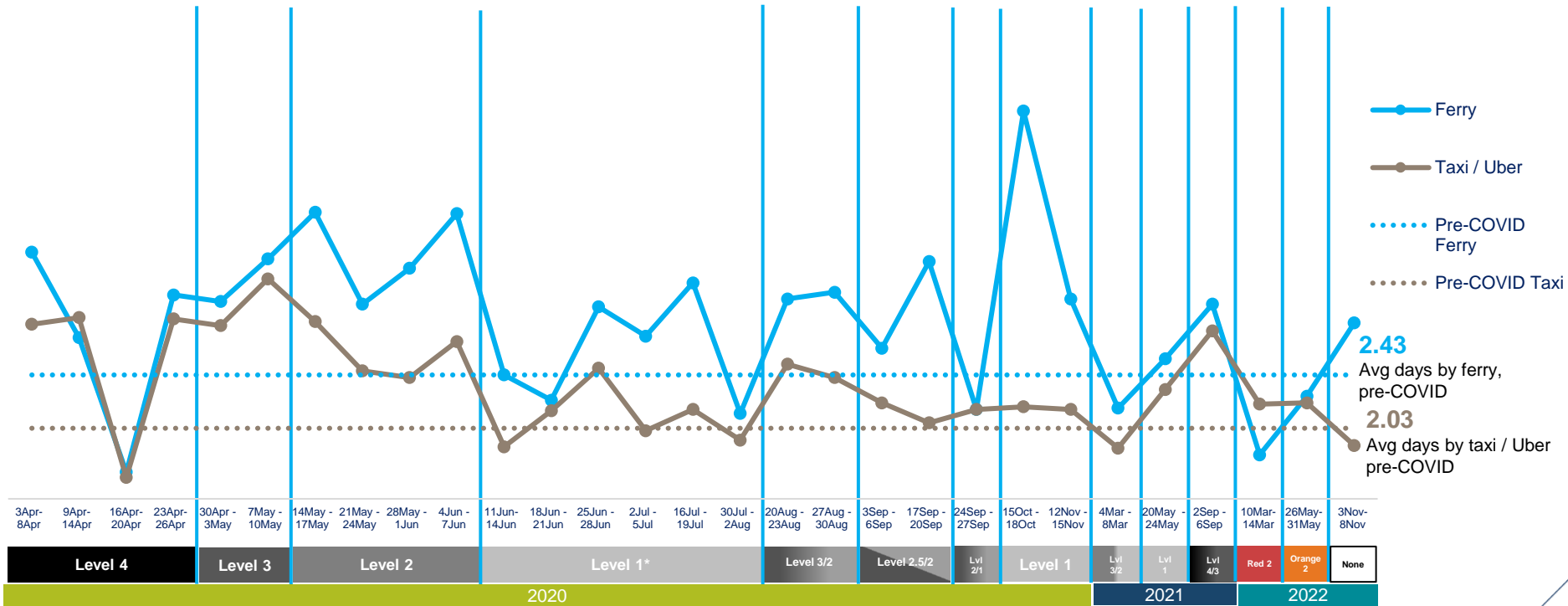
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Comparatively, weekly ferry and taxi users have often reported using those modes on more days than the average pre-COVID benchmark user.

Taxi and ferry mode frequency over time: among users



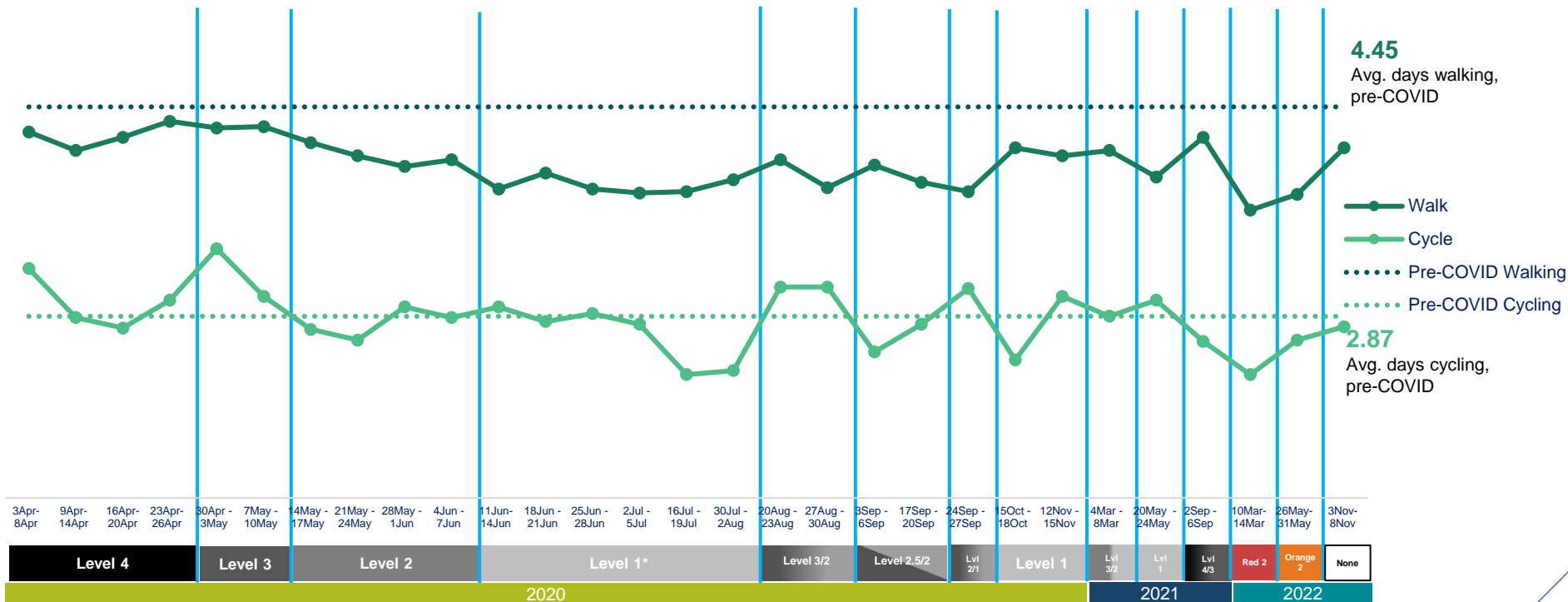
2.43
Avg days by ferry, pre-COVID

2.03
Avg days by taxi / Uber pre-COVID

QFREQ2 – And during the past seven days, on how many days have you travelled via each of the modes listed below?
Base: all adults 15+ in New Zealand in who used each mode in the past week: Wave 1-29 (n= between 1,181 – 1,407)

At no point during tracking have New Zealanders reported walking on as many days as in the benchmark, but among cyclists, frequency of travel has been quite close

Active mode frequency over time: among users



QFREQ2 – And during the past seven days, on how many days have you travelled via each of the modes listed below?
 Base: all adults 15+ in New Zealand in who used each mode in the past week: Wave 1 – 29 (n= between 1,181 – 1,407)



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Whenever restrictions are relaxed, car users tend to drive for roughly the same number of days as they would have pre-COVID

Private vehicle mode frequency over time: among users



QFREQ2 – And during the past seven days, on how many days have you travelled via each of the modes listed below?
 Base: all adults 15+ in New Zealand in who used each mode in the past week: Wave 1 – 29 (n= between 1,181 – 1,407)



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

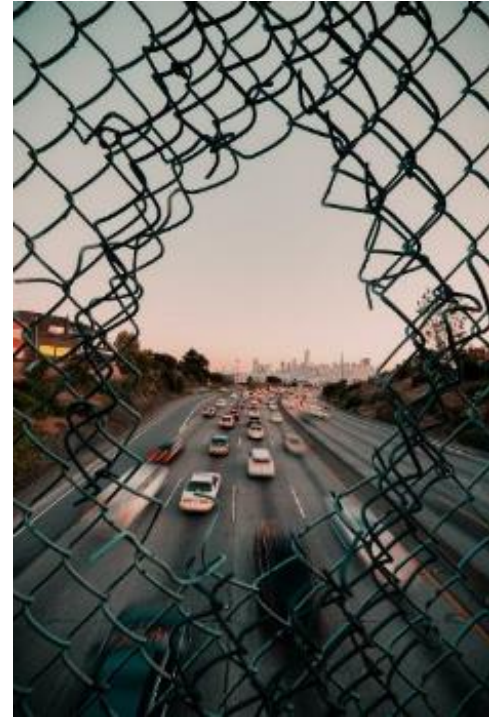


Section 6 – Public transport

Key findings – public transport

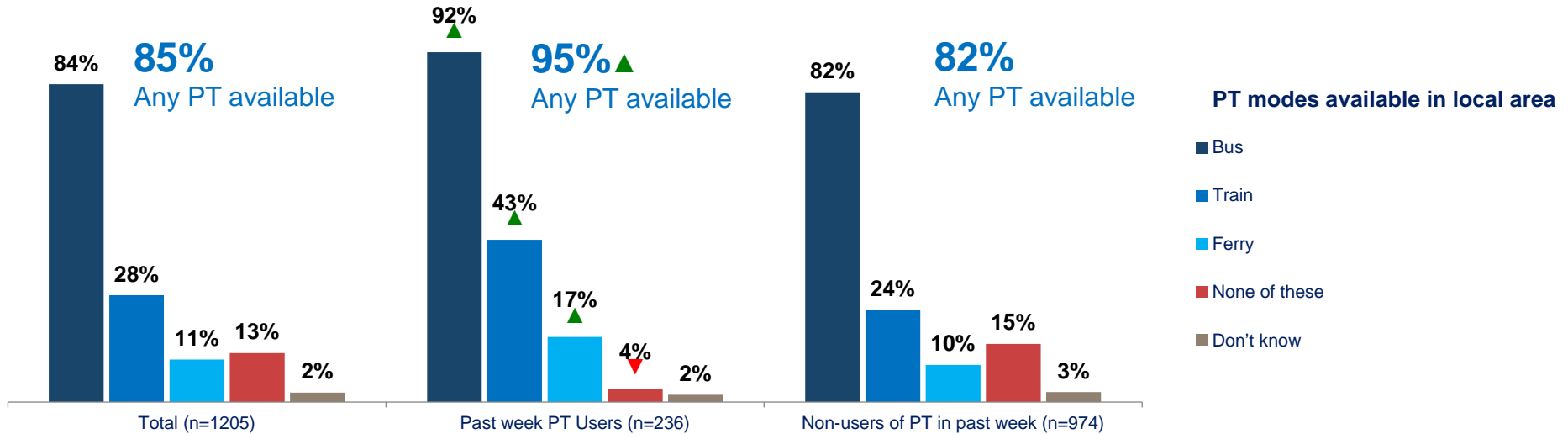
Waka Kotahi objective – how and why is travel changing?

- 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. Additionally, in May and November 2022, public transport choices may be further influenced by the presence of half-price fares across the network.
- While current PT network users are more likely to have access to a wider array of services, more than four in five non-users at least have a bus service in their area. However, this doesn't mean that the services present are relevant or useful for the trips they need to take.
- While the proportion of New Zealanders using public transport is now back to pre-COVID levels, the majority are travelling less often than they did before COVID.
 - This reduction is much less likely to be attributed to transmission concerns and more likely related to the life-changes that have occurred, such as working from home more often.
 - Nonetheless, nearly a quarter say that transmission concerns keep them off services, and 12% are less comfortable now masks are no longer required.
 - Compared to Delta and Omicron outbreaks, fewer travellers perceive an increased risk of COVID transmission, but there are still 34% of people who believe the risk is higher than before.
 - Reliability is now a more prevalent issue, with a significant increase in people saying services are not reliable enough for them to make use of and nearly a quarter saying they will use services more if they become more reliable.
- While COVID is less of a factor than before in minimising service patronage, it still has the potential to limit network usage again.



Most non PT users have access to buses in their area at least, but this does not necessarily mean that these modes are realistic for the journeys they need to make

Availability of PT modes



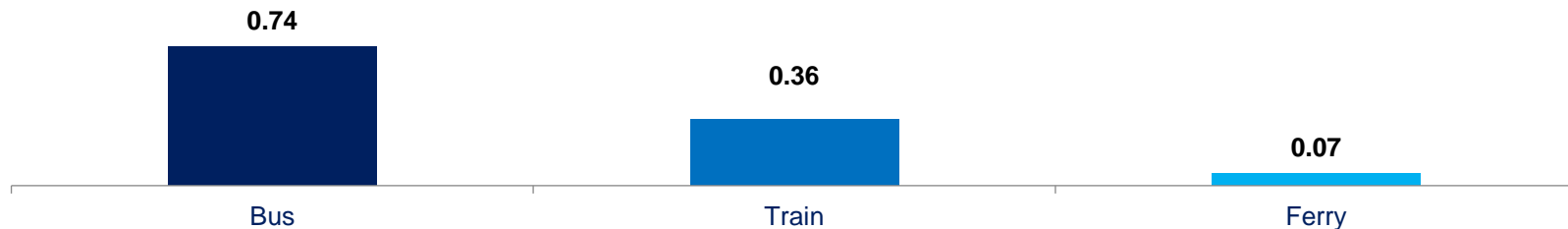
QAVAIL Which, if any of the following forms of public transport are available to people in your local area?

Base: All adults 15+ in New Zealand

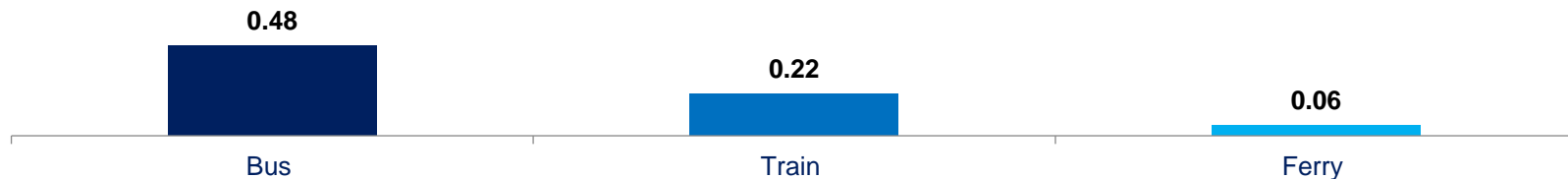


Even with restrictions lifted, the average New Zealander takes the bus once every 2 weeks, with frequency of all modes reduced compared to their pre-COVID estimate

Number of days travelling by each PT mode – pre-COVID



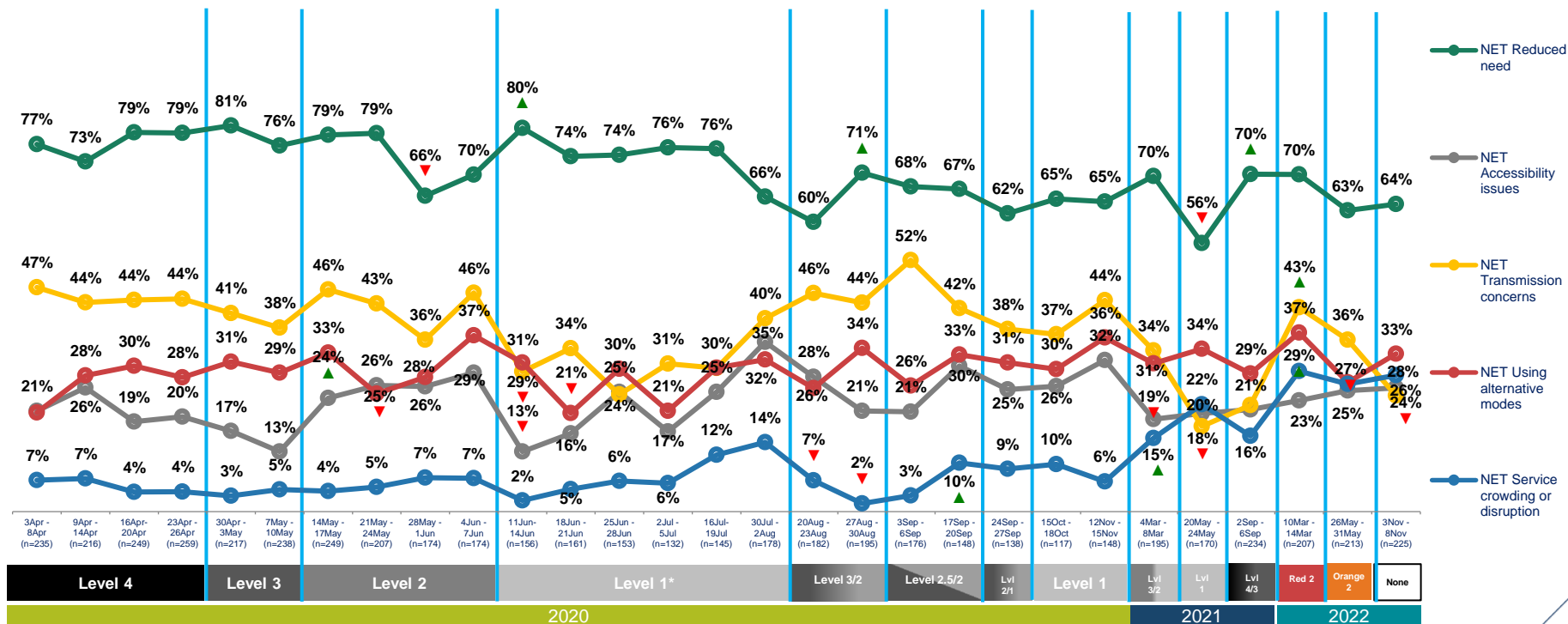
Number of days travelling by each PT mode – past week



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 wave 29 (n= 1,233)

Those reducing their bus usage are significantly less likely to cite transmission concerns, now a less common issue than service crowding and disruption

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



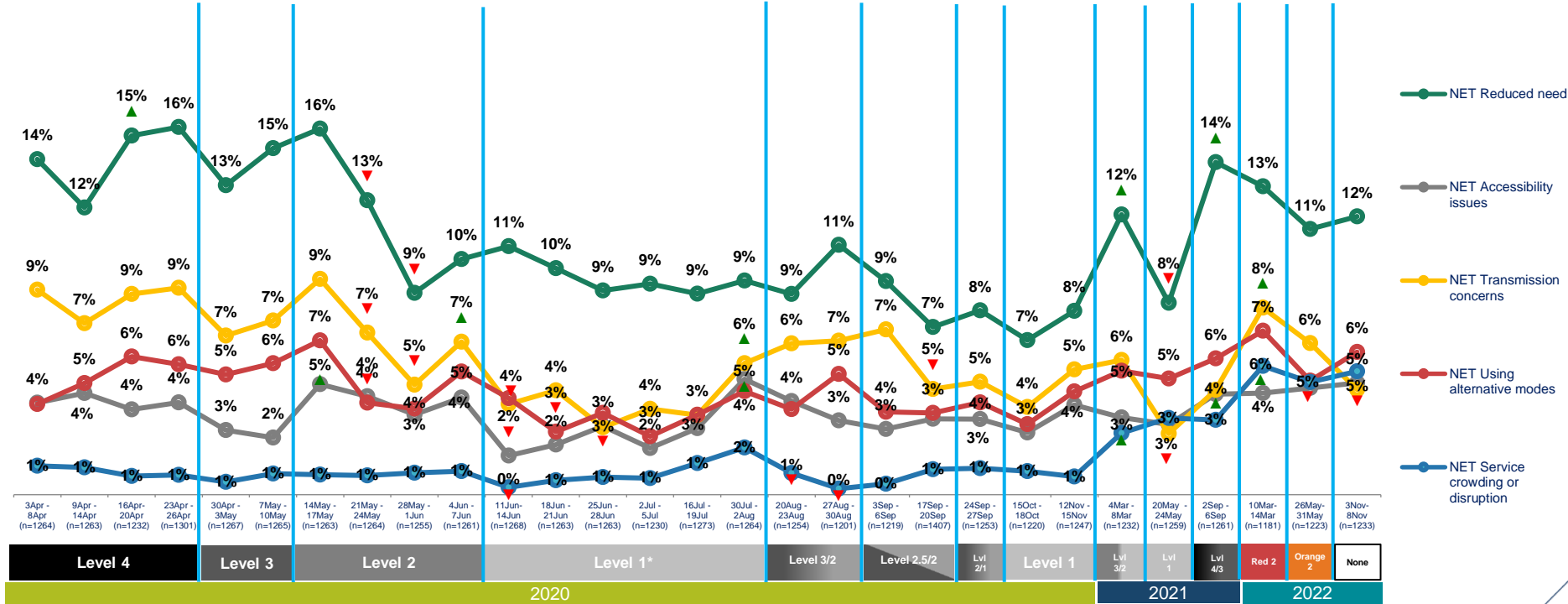
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

At a total population level, 1 in 10 New Zealanders use PT less than before COVID because they say they need it less

Reasons for decrease in PT activity – total population level



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



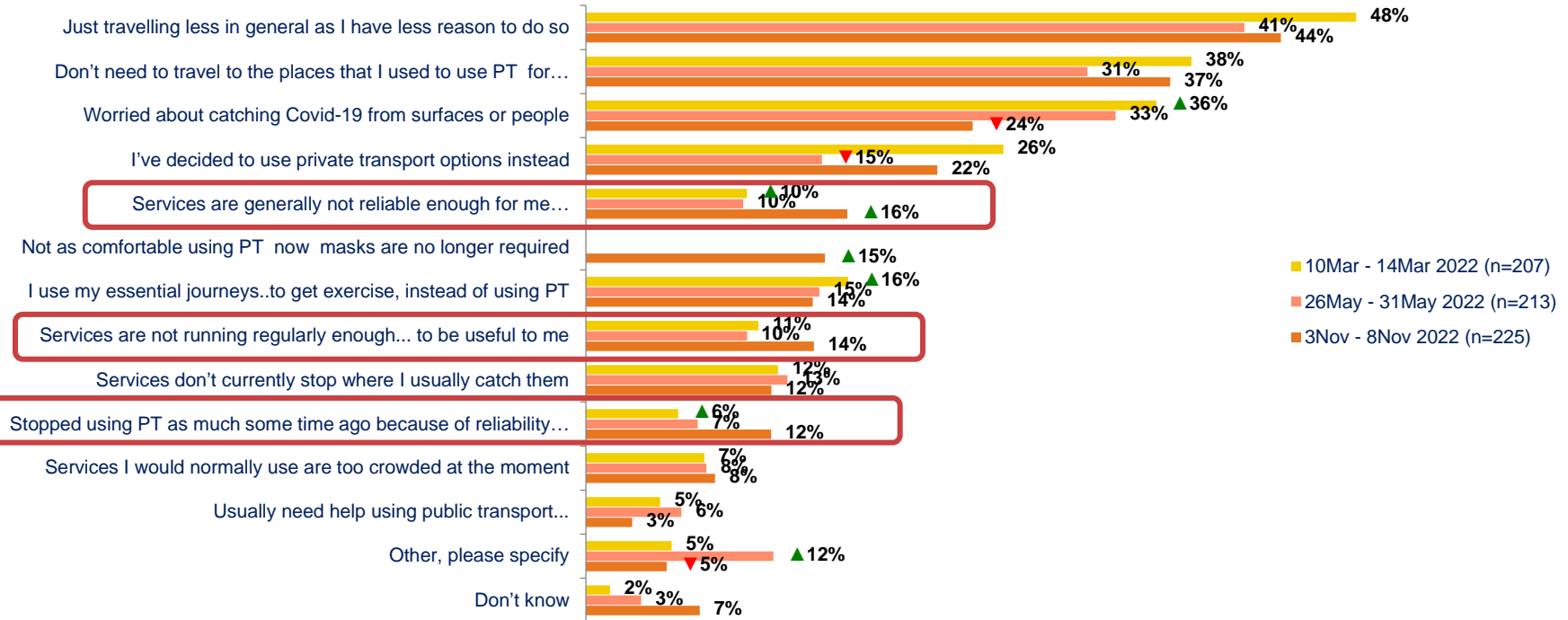
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Between May and November, there has been a significant 6-point increase in people citing unreliable services as a reason for using PT less

Reasons for decrease in PT activity



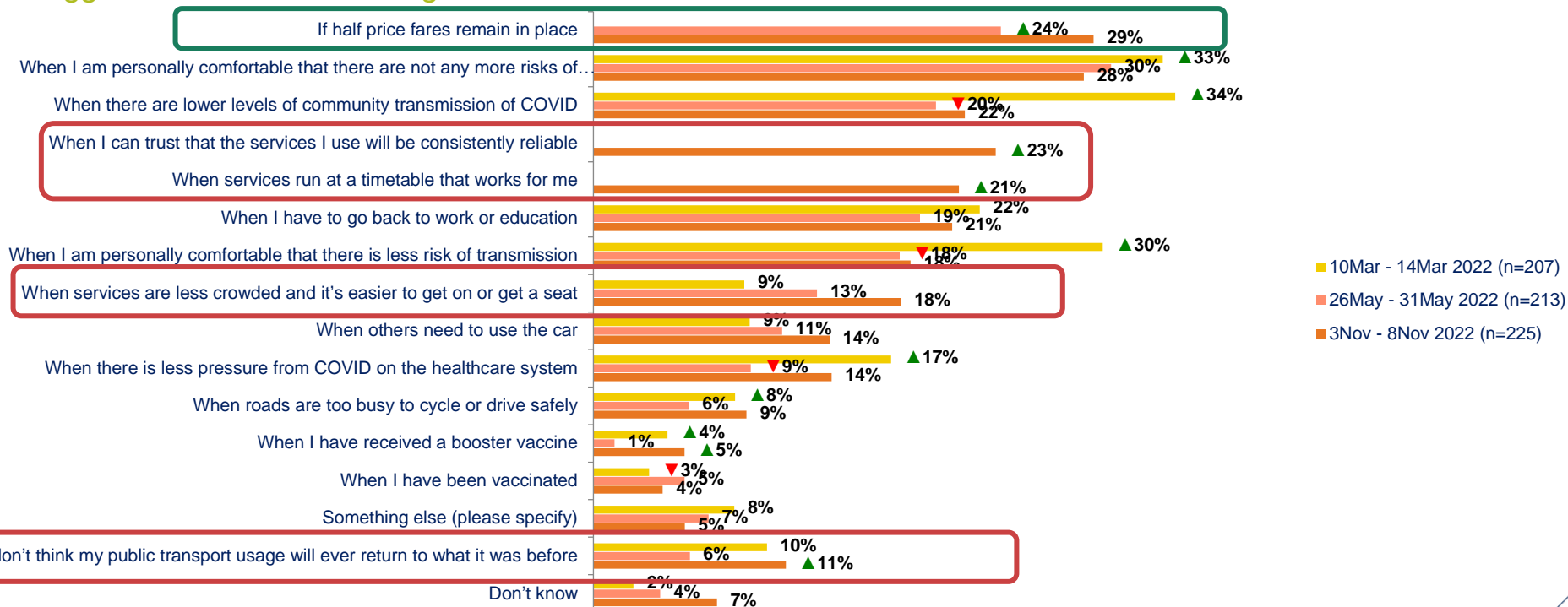
QDEC For which, if any of the following reasons, has your use of public transport decreased?

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



Almost 3 in 10 say they will use PT more if half-price fares remain in place, but reliable services on a workable timetable are a necessity for increasing patronage

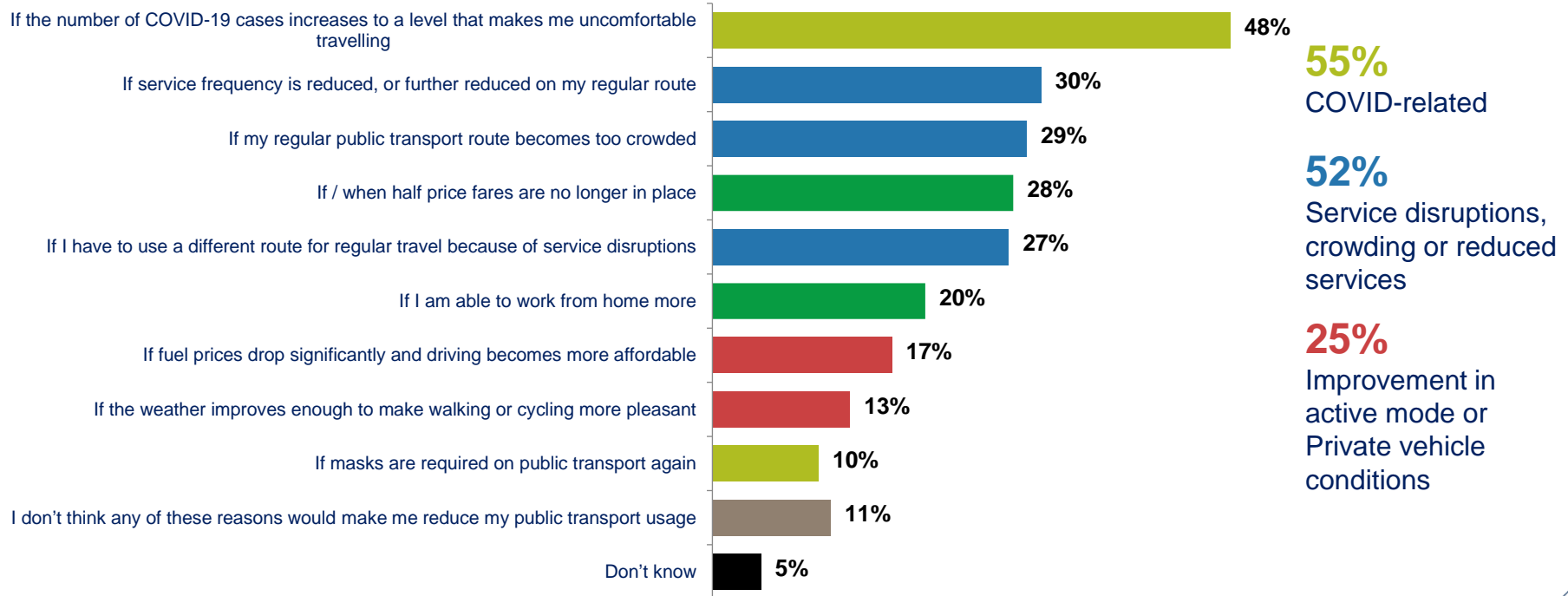
Triggers for return to PT usage



QDEC2 Which, if any of the following would encourage you to start using public transport as much as you used to?
 Base: All who have decreased PT usage in past week compared to pre-lockdown frequency

Almost half of current passengers indicate they would use PT less due to increased COVID cases, but increased disruptions are likely to have nearly as much impact

Triggers for reducing to PT usage – among past week PT users



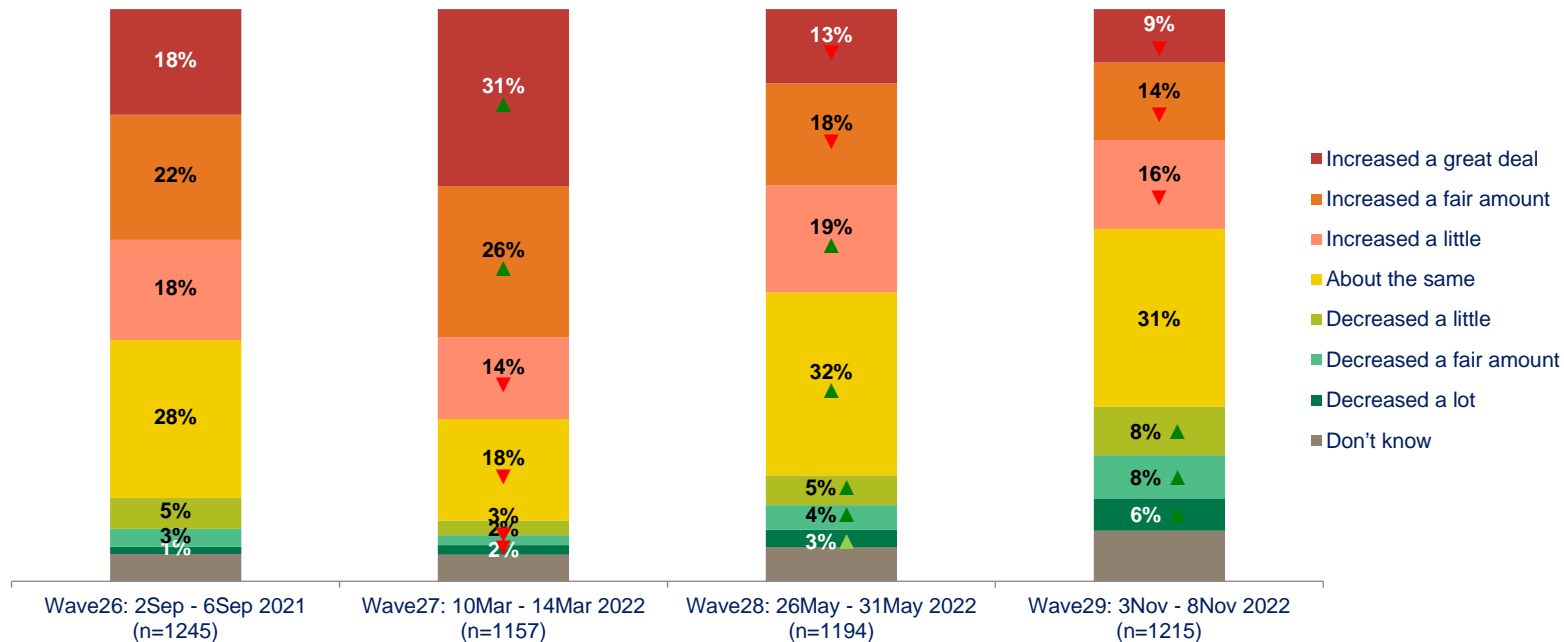
QDEC3 Which, if any of the following might cause you to use public transport less?

Base: All past week PT Users (n=244)



While it is significantly lower than under Delta or Omicron outbreaks, 38% think that the COVID transmission risk has increased a little, only 21% think it is decreased

Perceived relative risk of COVID transmission on public transport



QPT3 – Compared to a previous COVID-19 outbreaks, to what extent do you currently feel that the risk of catching COVID-19 when travelling by public transport has increased, decreased or is it about the same?
 Base: all adults 15+ in New Zealand



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period



Section 7 – Working from home

Key findings – working from home

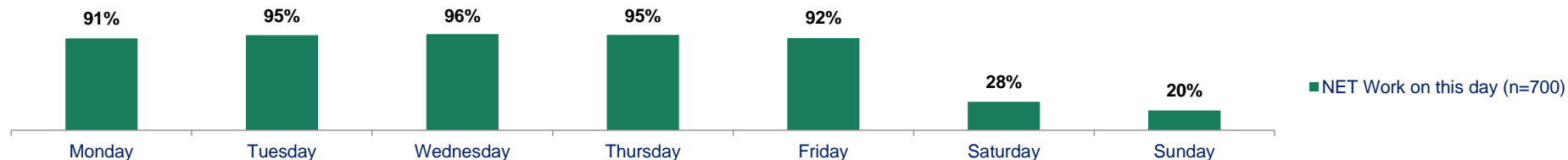
Waka Kotahi objective – understanding behaviour change

- 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.
- At a total level, the proportion commuting for the majority of their work has increased, but not significantly, from May.
- Working New Zealanders are generally working on the same days as they did pre-COVID, with some reduction in the proportion working each weekday.
 - With so much time elapsed since March 2020, it is likely that normal job changes and churn have an impact on this.
 - However, among those working, the rate of working from home is 7-10 points higher than the claimed pre-COVID rate every day, with the exception being weekends.
 - This means that Monday-Friday, the total number of New Zealanders travelling for commuting purposes is down 4-points.
 - Weekend workers, less likely to be in office-based jobs, saw little variation from their normal behaviour even under the September 2021 Delta outbreak.

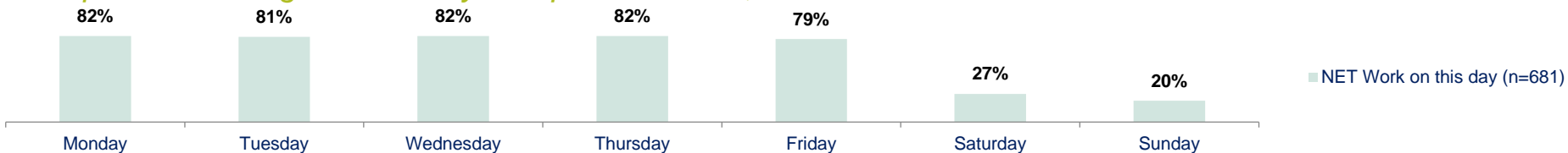


Compared to pre-COVID activity, slightly fewer New Zealanders are working on each week day, usually down less than 5-points, but higher than under Delta outbreak

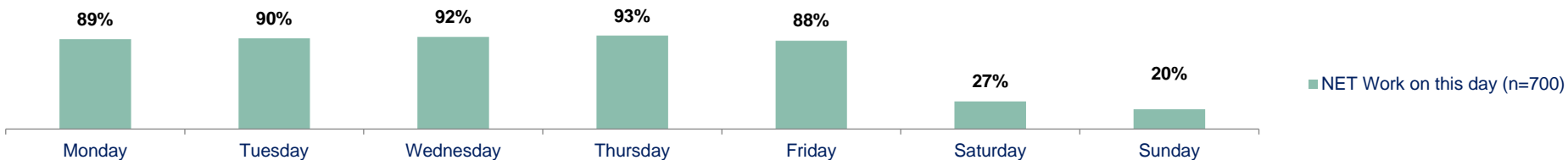
Proportion working on each day – pre-COVID



Proportion working on each day – September 2021, Delta outbreak



Proportion working on each day – past week



QWORK2E_NEW_A 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 2021), Wave 29 (3Nov-8Nov 2022)



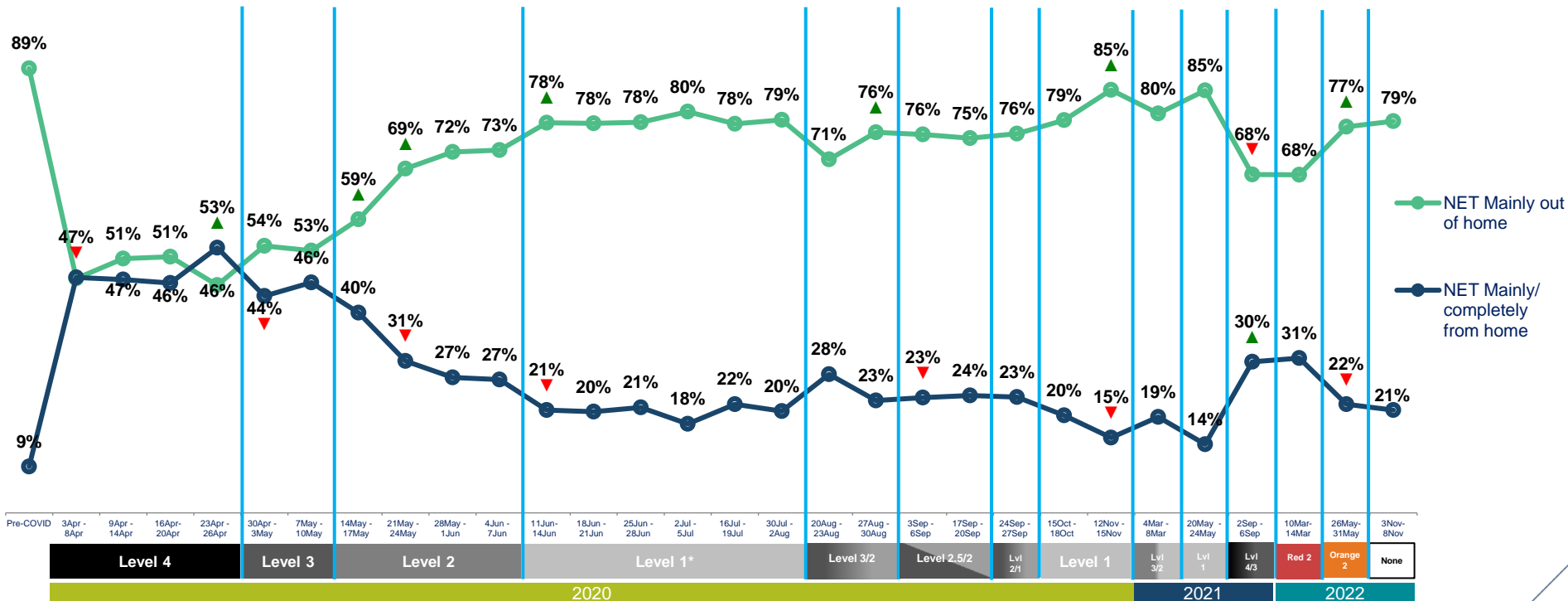
Indicates a statistically significant increase from pre-COVID incidence



Indicates a statistically significant decrease from pre-COVID incidence

Despite the reduced restrictions, the proportion working mainly or completely from home has remained roughly at the level reported in May

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



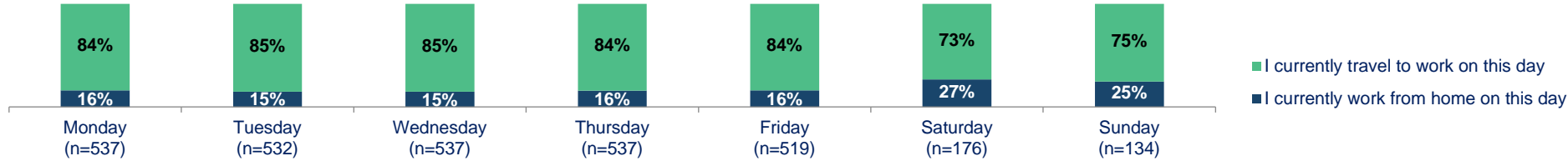
Indicates a statistically significant increase from previous time period



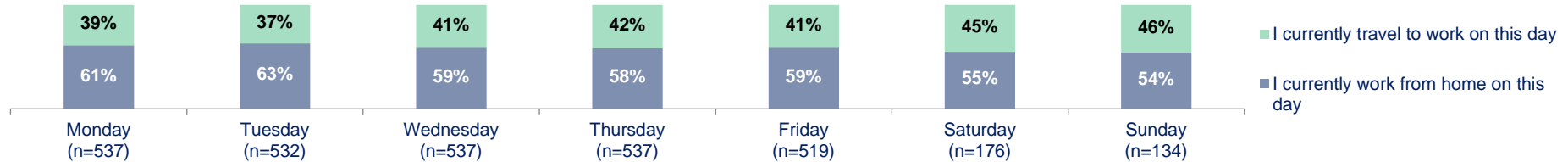
Indicates a statistically significant decrease from previous time period

On each week day, the proportion of workers working from home is 7-10 points higher than it would have been pre-COVID

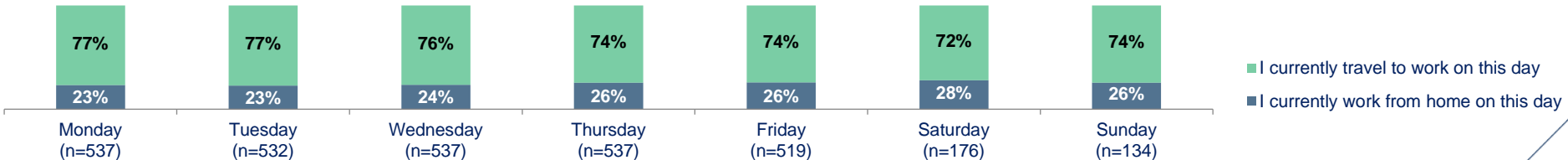
Share of workforce working from home on each day – pre-covid



Share of workforce working from home on each day – September 2021, Delta outbreak



Share of workforce working from home on each day – September 2021, Delta outbreak

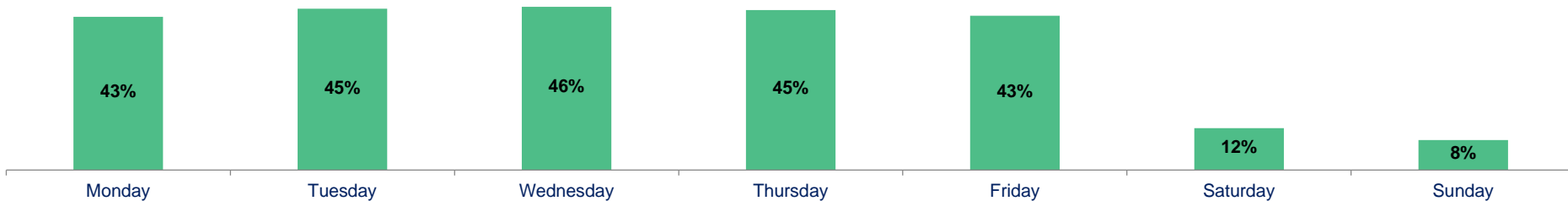


QWORK2E_NEW. Thinking about the last week, for each day, please state your current work travel arrangements:

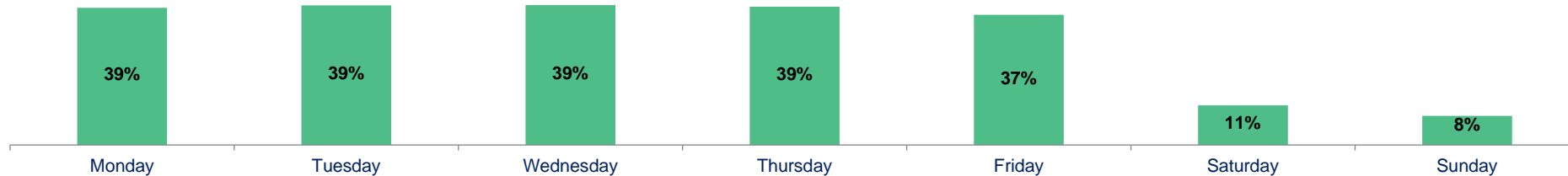
Base: All working adults 15+ in New Zealand on each day of the preceding week in wave 26 (2Sep-6Sep);

At a total population level, the impact is a 4-6 point reduction in the proportion of people commuting on every day of the week, with little difference at weekends.

Proportion of New Zealanders commuting each day – pre-covid



Proportion of New Zealanders commuting each day – past week



QWORK2E_NEW. Thinking about the last week, for each day, please state your current work travel arrangements:

Base: All adults 15+ in New Zealand in wave 29 (3Nov-8Nov), n=1,233

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Ipsos Ltd operates a management system that complies with the requirements of ISO 20252.



