



# COVID-19 transport impact research

Knowledge Hub Presentation

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# COVID-19 Transport Impact Study purpose and design

## Description

- Continuous monitor to assess impact of COVID-19 on NZers transport choices
- Investigates how **transport choices, attitudes and perceptions** are changing
- Help to understand, respond and influence future travel habits

## Study design

- Online 15 minute quantitative survey of a nationally representative sample
- Weekly sample of about 1,260 (15+ yr olds), including those with disability

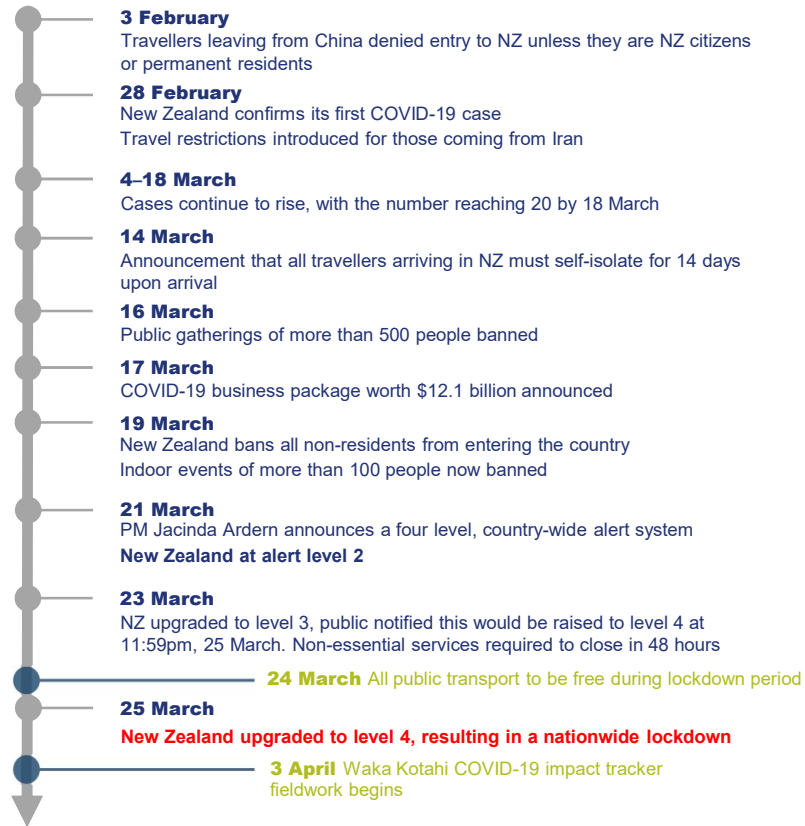
## Running weekly

Since Friday 3 April (Alert Level 4 began Thursday 26 March)

Published online: [www.nzta.govt.nz/covid-19-impacts-on-transport](http://www.nzta.govt.nz/covid-19-impacts-on-transport)



# Context: New Zealand COVID-19 timeline



# Alert levels - recap

## Lockdown

4

- Businesses closed except for essential services, such as supermarkets
- Essential personal movement only
- Safe recreational activity in local area only

## Restrict

3

- Travel for essential personal movement
- Physical distancing
- Children to learn at home if possible
- Work from home if possible
- Businesses can open but not interact with customers
- Inter-regional travel highly limited

## Reduce

2

- Businesses can open to the public if following public health guidance including physical distancing and record keeping
- Alternative ways of working are encouraged where possible
- Keep physical distancing of 2 metres from people you don't know when out in public or in retail stores. Keep 1 metre physical distancing in controlled environments like workplaces
- Children to return to schools, early learning services and tertiary education.

## Prepare

1

- No restrictions on personal movement but people are encouraged to maintain a record of where they have been
- No restrictions on domestic transport — avoid public transport or travel if you're sick.

# COVID-19: What have we learned?

Our changing travel behaviour



Usage of public transport



Returning to school, work or working from home



Physical shopping vs. E Commerce



How is this all being used?

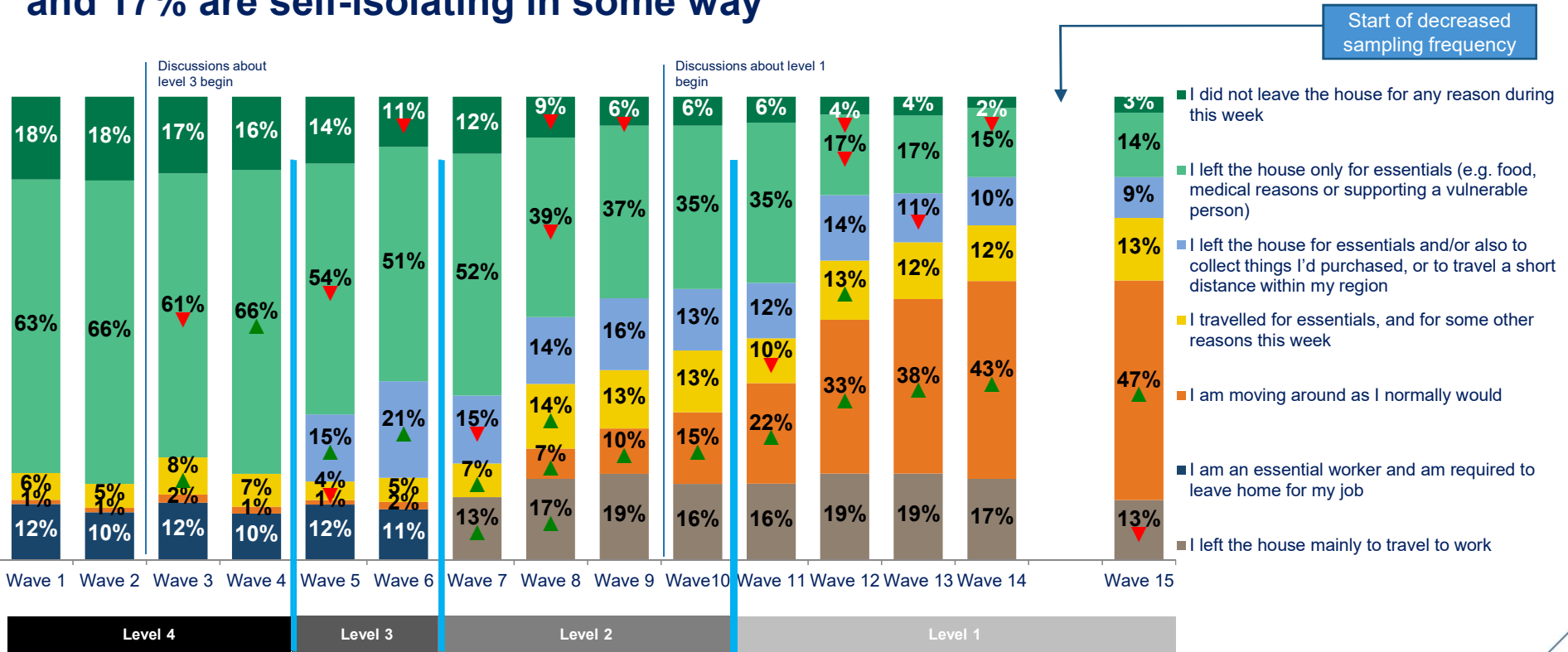
This is just a snapshot for more see: [www.nzta.govt.nz/covid-19-impacts-on-transport](http://www.nzta.govt.nz/covid-19-impacts-on-transport)

# Our changing travel behaviour





# Almost half say they're now travelling as they did pre-Covid and 17% are self-isolating in some way



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

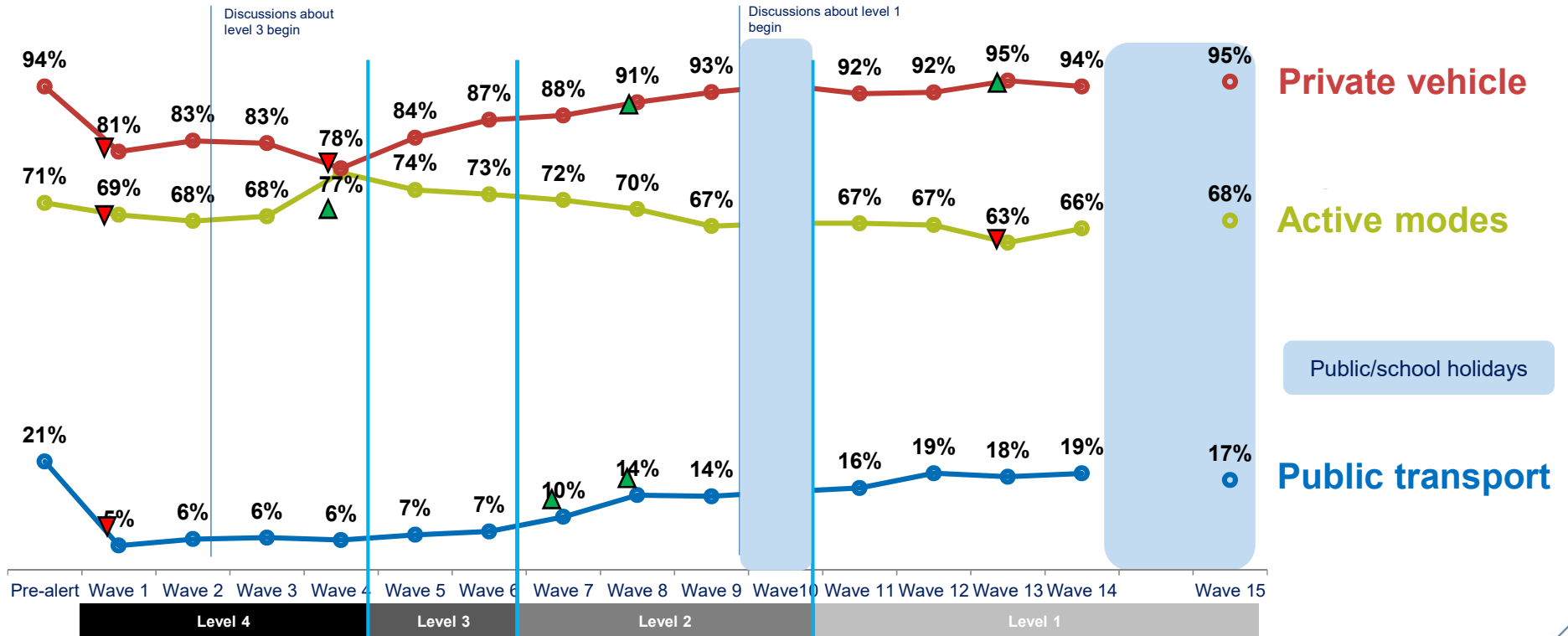


Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

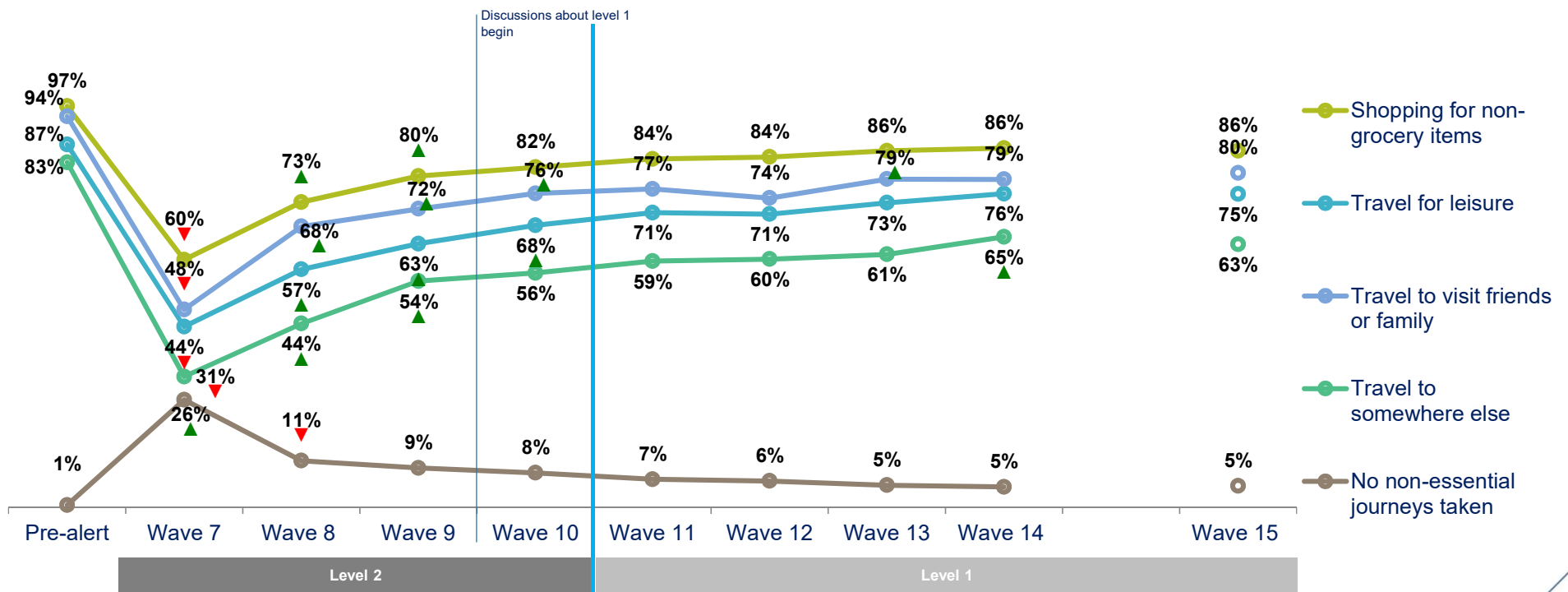
# Ups and downs in mode use throughout alert levels



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

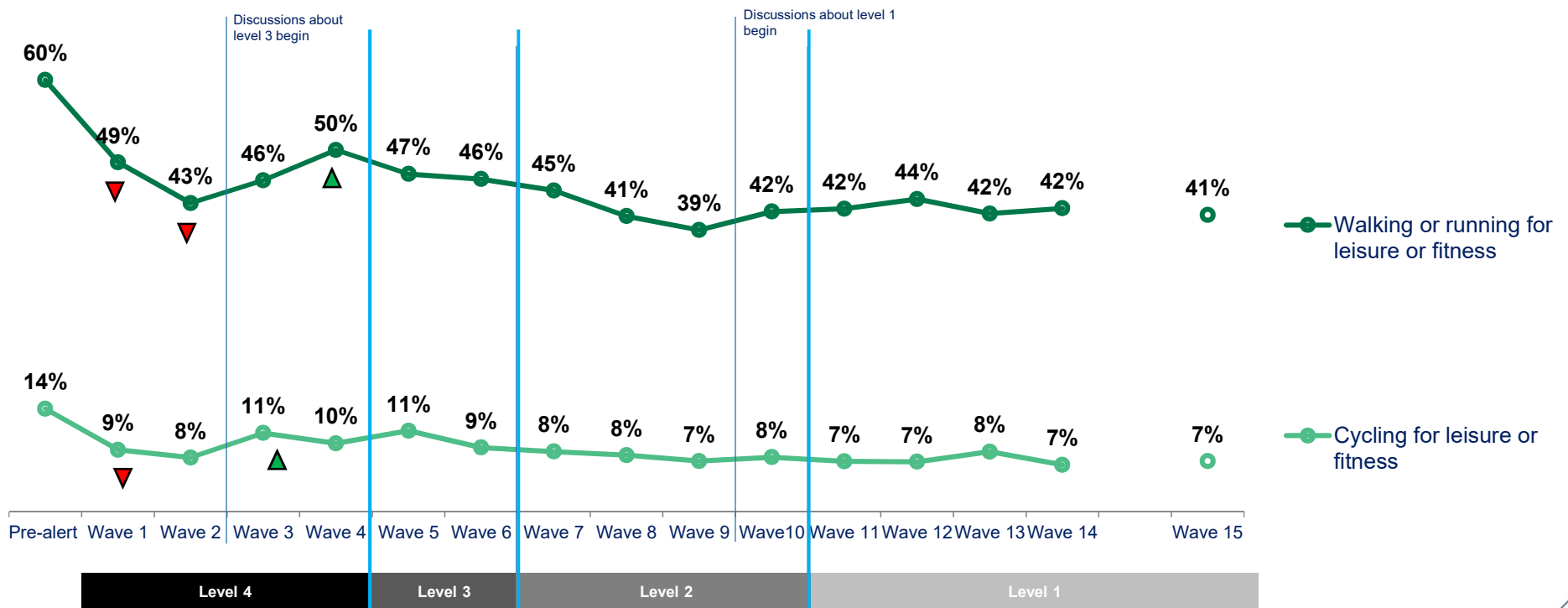


# Once non-essential journeys became possible in Level 2, there were several weeks of increased travel but this has now plateaued



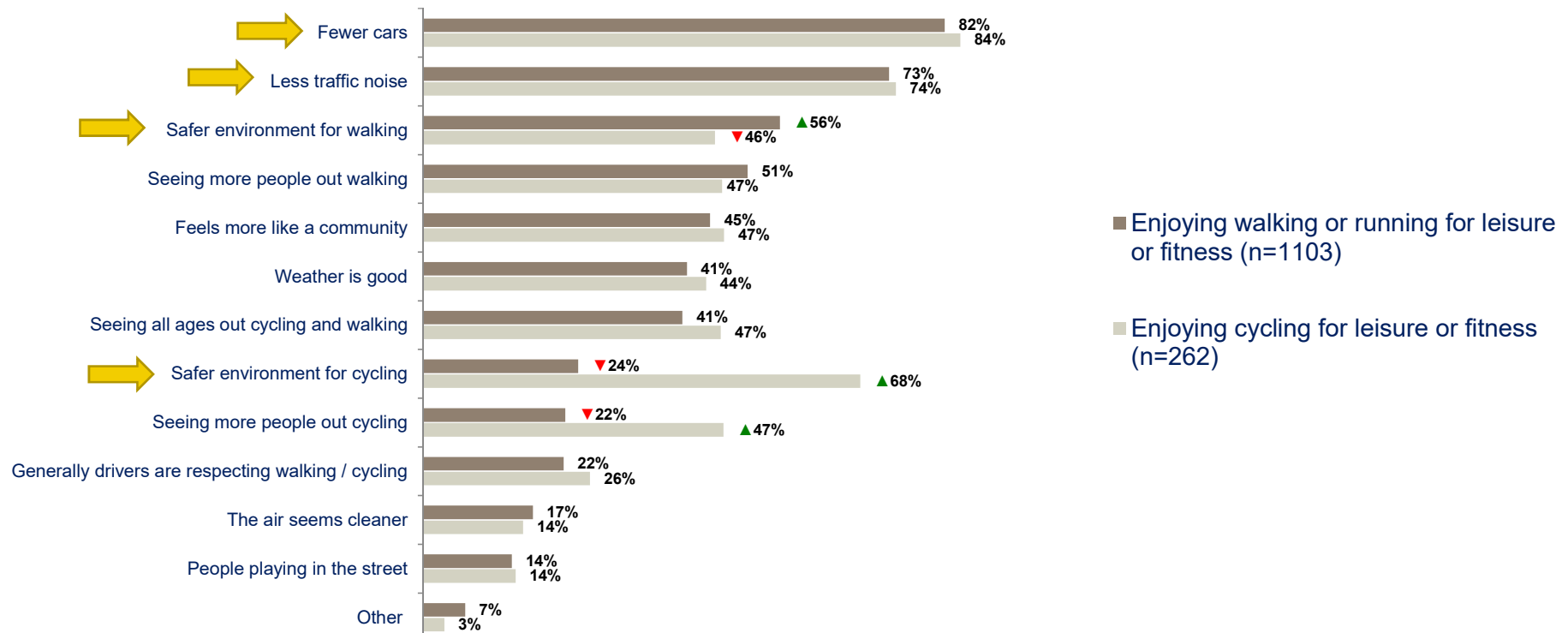
How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?

# Leisure and exercise trips began dropping at Level 3 and have remained at a lower level during the winter months



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

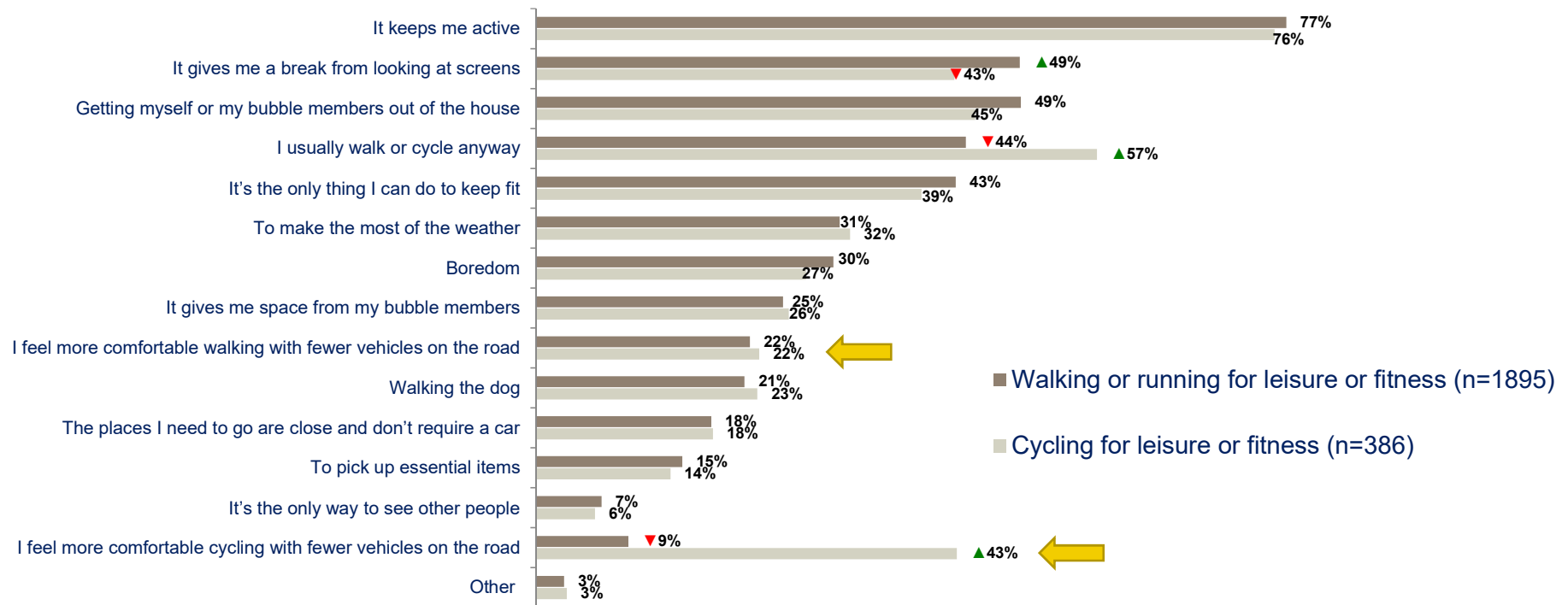
# Absence of cars important for streets being more enjoyable for those exercising



What are the main reasons that you are finding walking / running or cycling on roads and streets more enjoyable now?

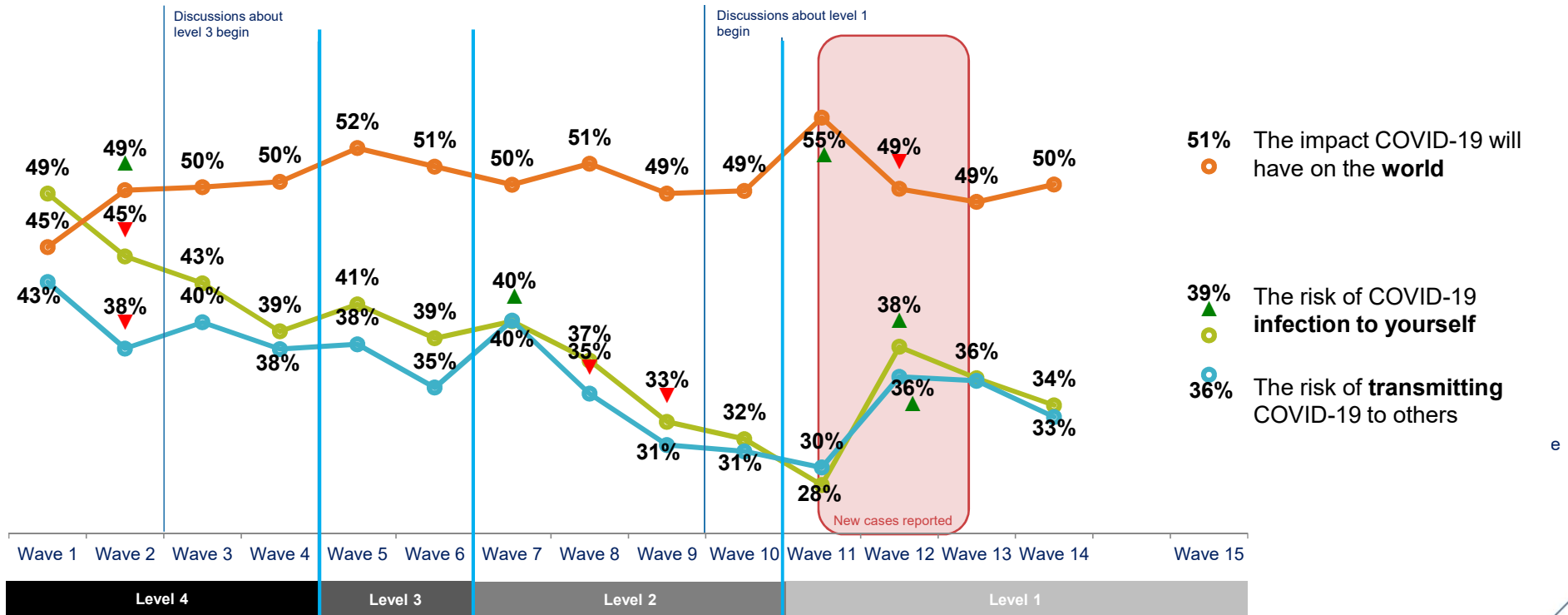
# Keeping active key reason for walking / cycling for leisure during Levels 4 and 3

## But fewer vehicles also featured as reasons



What are the main reasons that you choose to walk, run or cycle for fitness, leisure, or transport at the moment?

# New Covid cases in NZ increased concern of infection and transmission



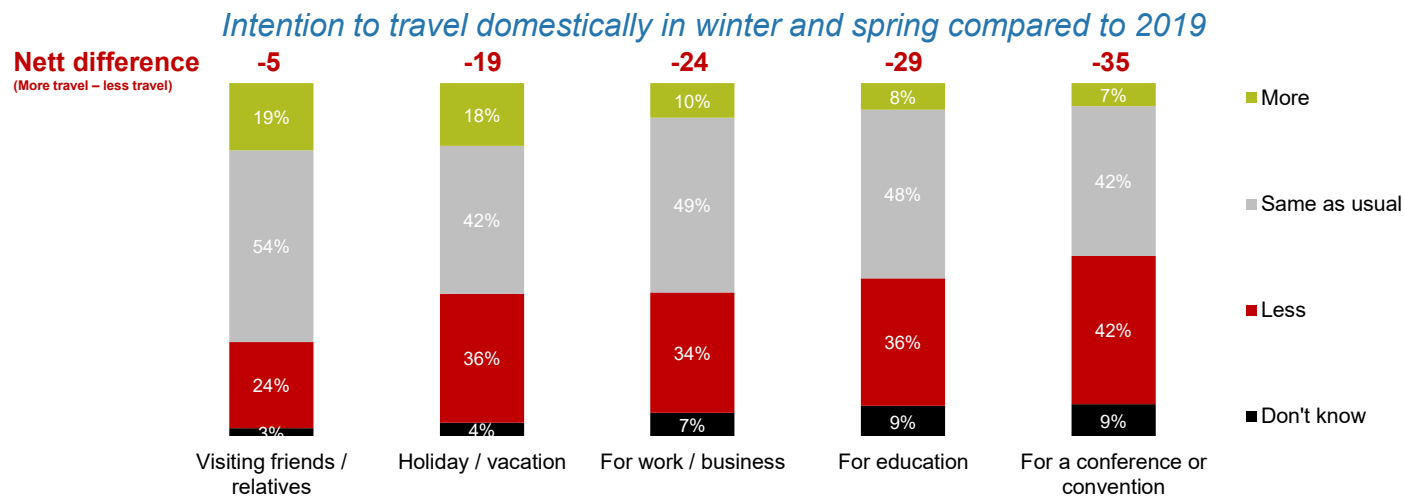
How personally concerned are you about each of the following?

# Inter-regional travel will be lower than in 2019

## Forecasting travel compared to 2019

NZ will see a significant decrease in inter-regional travel in the next six months, across all purposes

- Travel to visit friends and family will only be slightly lower than in 2019
- More consideration of domestic holidays now in Level 1, but far fewer will be taken than in 2019



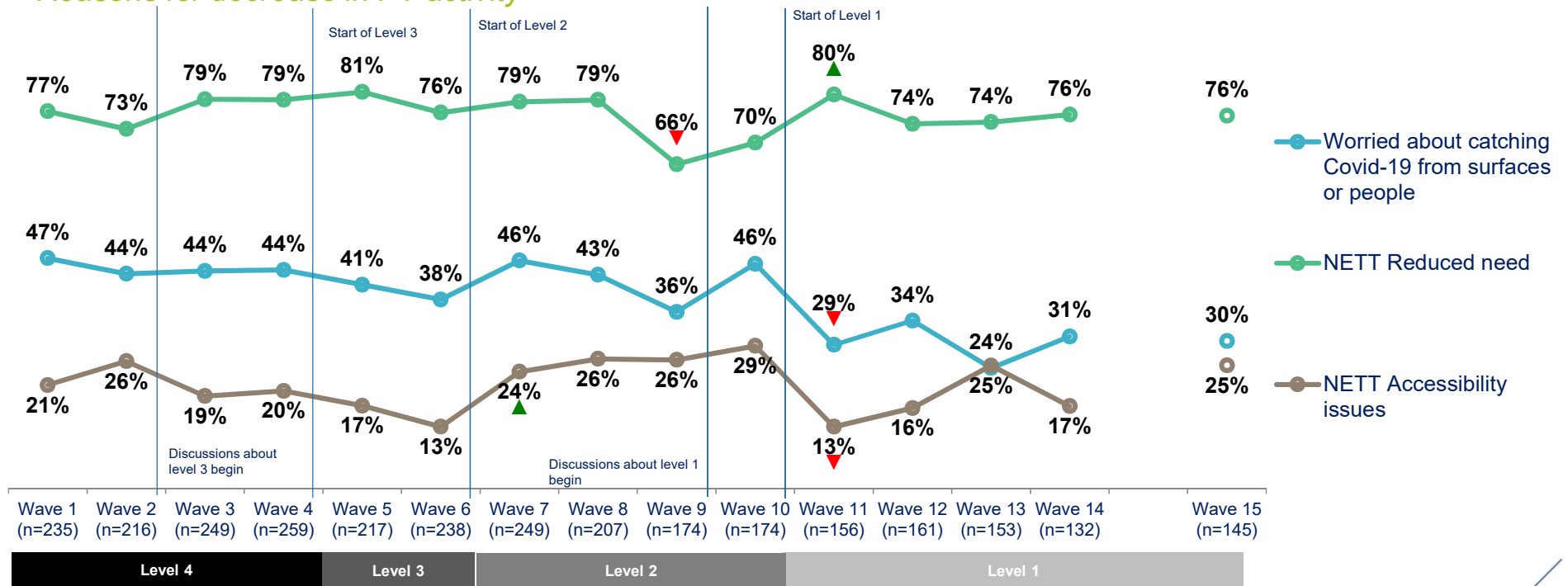
# Public transport usage





# Reduced need has been the most consistent overall theme in reasons for using public transport less, even when journeys have begun to pick up

## Reasons for decrease in PT activity



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

# As COVID-19 alert levels drop, the proportion saying that buses are safe, convenient and can get them where they need has increased

## Perceptions of the bus

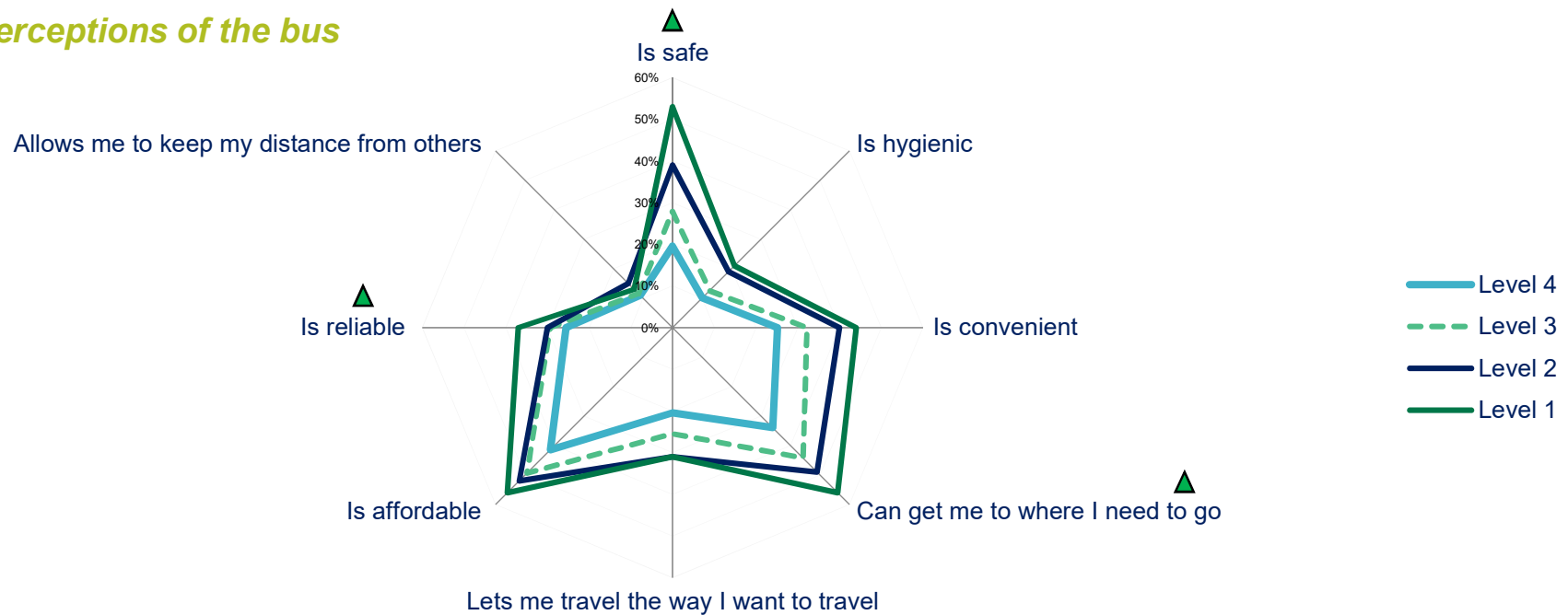


Image Statements - And which transportation methods would you currently associate with each of the following qualities?

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

## Return to school or work, or working from home



# Return to school – intention vs behaviour

Hesitancy and resistance did not translate into keeping kids home as some indicated

Week prior to 18 May

47% parents  
certain to return  
children to school\*

18 May wider school re-opening

80% parents said  
children had  
returned to school

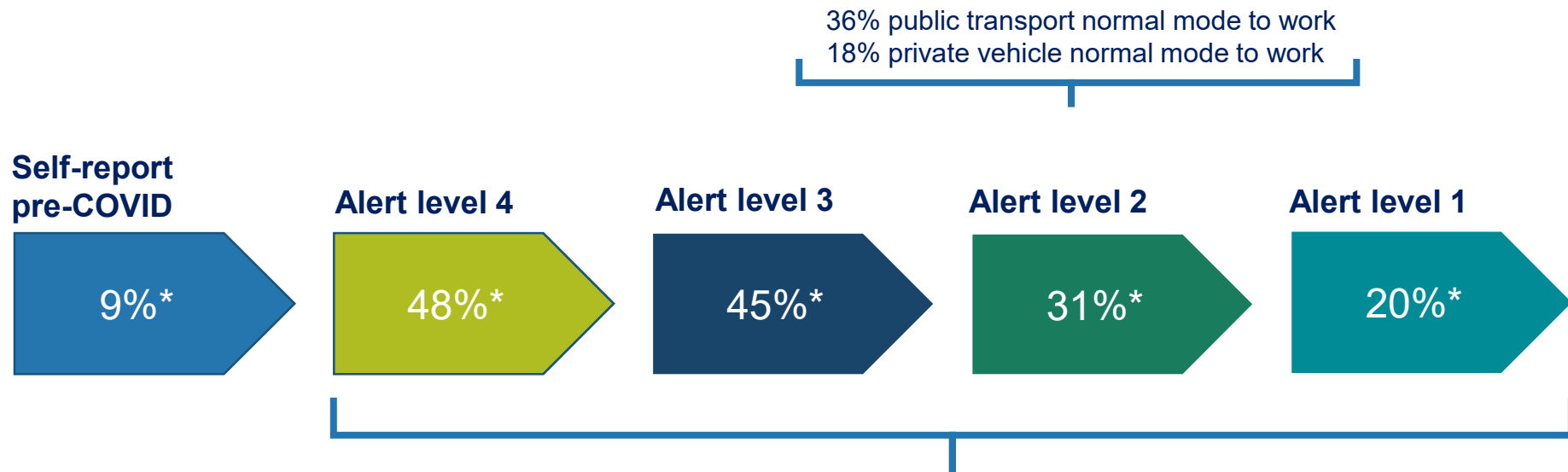
1 week post 18 May

85% parents said  
children had  
returned to school

\* Includes 9% children who had already returned

# Working from home

Potential for major impact on the transport network



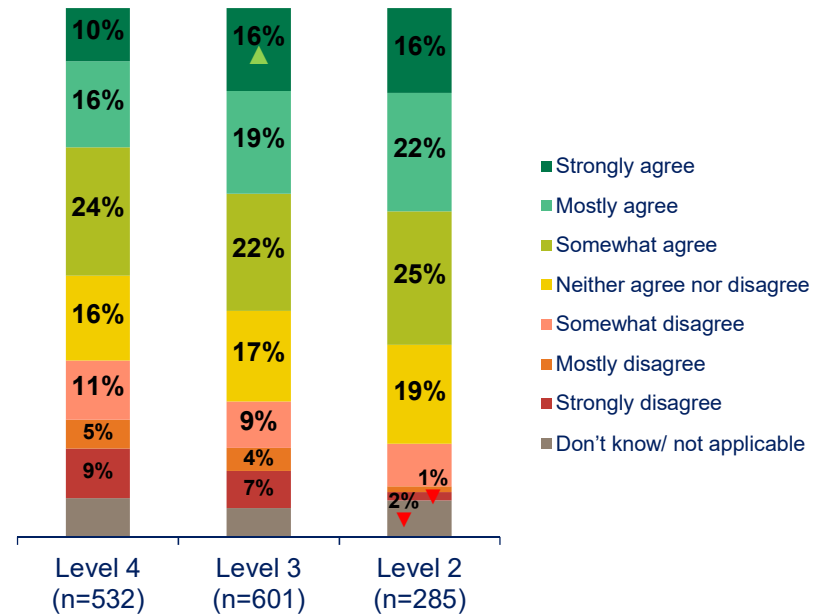
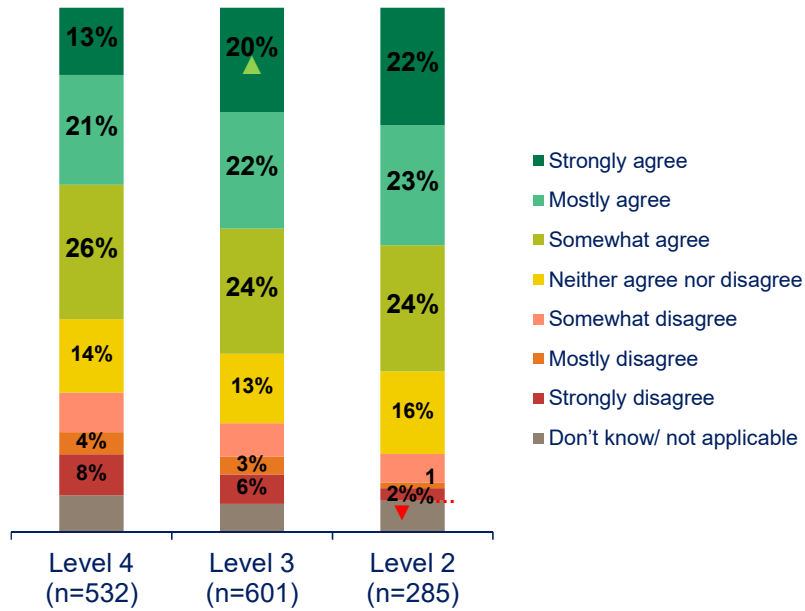
\* mainly or completely from home

38% public transport normal mode to work  
21% private vehicle normal mode to work

# Expected increased future workplace flexibility for working from home

*“I think my workplace will become more flexible / open to people working from home”*

*“I think my workplace will change how it operates so more people can regularly work from home”*

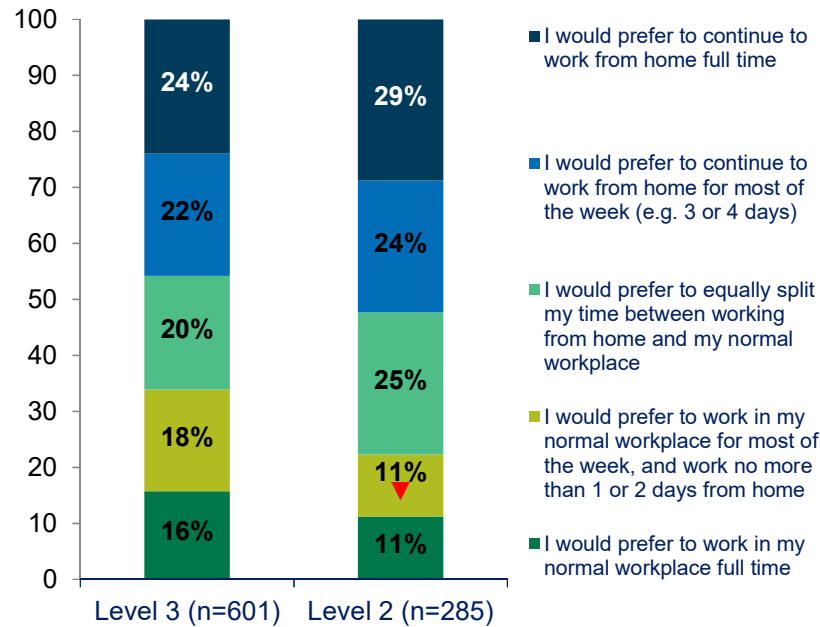


Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements?

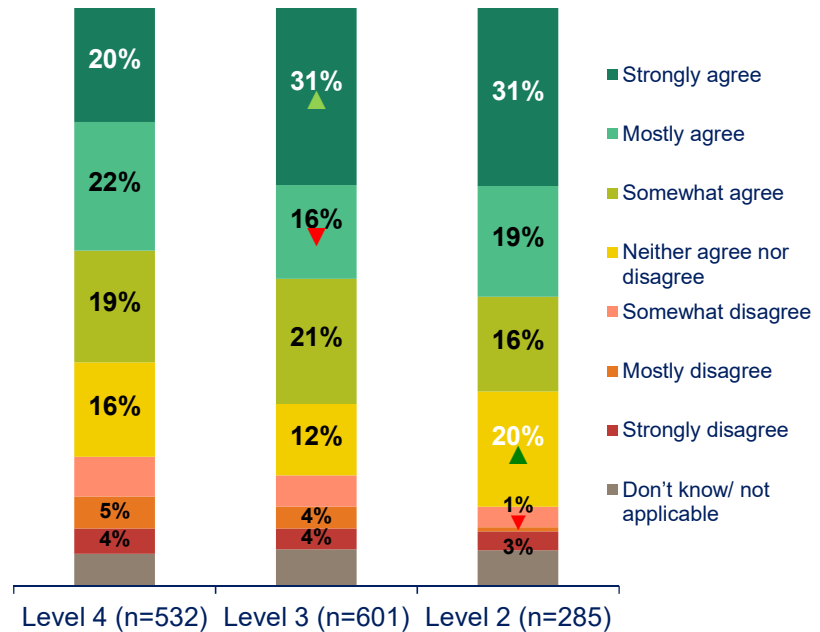


# Desire for flexibility increased over alert levels

## 89% prefer to work from home in some way



## Increasing desire for flexibility as levels drop



Thinking now about the future and how people's work habits may change after lock-down restrictions begin to loosen, to what extent do you agree or disagree with the following statements? And thinking about the period immediately following the end of the lockdown, when everyone is permitted to return to the workplace. Which of the following applies to you?





## Shopping in person vs e-commerce



# Physical shopping vs E-Commerce

On-line supermarket use - temporary & out of necessity?



- The number and frequency of physical shopping trips declined during higher alert levels *but*
- physical supermarkets retained most of their weekly shoppers throughout *with*
- 93% using them at least once a week in level 4 *compared to*
- 99% pre-lockdown

# Physical shopping vs E-Commerce

Online grocery and non-grocery shoppers were asked about how they received their purchases across level 3 and 2



## How shoppers received their purchases:

- 60% purchases delivered
- 11% collected purchases from store or seller
- 23% used both delivery or collection

## How shoppers collected their purchases:

- Majority used private vehicle (77%)
- Many lived close enough to walk (7%) or cycle (4%), amounting to 11% doing so by active modes
- Barely any used public transport (5%) to collect their purchases

# Loss of work and loss of work hours

Of those working pre-lockdown.....



Alert Level 4

31% stood down or lost employment\*

Alert level 2

11% stood down or lost employment\*

Last week

9% stood down or lost employment\*

Loss of work hours peaked in first wave of level 3 at 22% and sits at 18% two weeks ago

\* Of people working pre-lockdown

**How is this all being used?**



# When & how insights have fed into decision making

Deb Hume – Waka Kotahi

Carolina Lukkien – Ministry of Transport



# Wrap-up & Questions

## Take home messages

Too early to know for sure what will be enduring changes, but:

1. Transport system response and recovery is still evolving and is fragile. Travelling confidence is influenced by new COVID-19 cases and will likely continue to be impacted by factors such as border closures, and the potential longer term effects of economic factors
2. Return to public transport has been slower than other modes, but faster in NZ than other countries. This is influenced by people travelling less, winter and lack of international students (who are often more dependent on Public Transport)
3. More people are, and want to continue, working from home. We don't know what shape this will be yet
4. Friends and family are important – they are the main reason we are travelling inter-regionally

Many other topics – disability, Covid-19 vulnerable, domestic tourism, active modes, self-isolation, re-introducing of fares for public transport, modal shift patterns and volume of mode usage, journey barriers and lost journeys, perceptions of travel modes





# Acknowledgements

- **Ipsos:** Bart Langton, Tom Magill, Cameron Robinson, Marise Russo & Carin Hercock
- **Waka Kotahi:** Deb Hume, Carol Christie, Galina Mitchelhill, Glen Wright, Ashita Nepak, Karen Brodie, Nigel Curran & Peter Cockrem
- **MoT:** Carolina Lukkien & Bryce Hartell

