



# Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–20 core report

24 September 2020

# Disclaimer

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

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

For more information on the COVID-19 weekly tracker contact:  
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## 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.

\*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 and 19 are weekly.

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

- 1) Online dashboard results delivered through Harmoni
  - with the ability to manipulate, interrogate and export the data according to your areas of interest.
- 2) Regular\* overview power point report
  - benchmark and longitudinal summary of key data points
  - including extra analysis based on topical questions.
- 3) An infographic of key data points
  - visual representative of results for ease of access.



Example: Harmoni dashboard page

# Overview of research (ii)

## Question topics in the survey

### Question areas covered in the research:

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

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

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

- change is measured since February 2020.

#### Modal shift patterns and perceptual shifts

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

#### Measuring attitudinal shifts towards COVID-19

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

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

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

#### Ad hoc questions of interest

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

# Report notes (i)

## Key information to note for this report

- This report is based on twenty waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves, combined sum of waves 5 and 6, combined sum of waves 7, 8, 9 and 10, combined sum of waves 11, 12, 13, 14, 15, 16, the combined sum of waves 17 and 18, and the combined sum of waves 19 and 20, 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 20 report is based on a statistically significant shift of results between waves 1 to 20, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs combined level 2 alert results vs combined level 1 vs combined level 3/2 vs combined level 2.5/2 to date.
- At a sub-population level, significance testing indicates a statistically significant difference between the sub-population and the base or total population. The total population benchmark is based on the total sample base collected across the first four waves of data.

Wave	Dates of fieldwork	Alert level
1	Friday 3 April to Wednesday 8 April	Alert level 4
2	Thursday 9 April to Tuesday 14 April	
3	Thursday 16 April to Monday 20 April	
4	Thursday 23 April to Sunday 26 April	
5	Thursday 30 April to Sunday 3 May	Alert level 3
6	Thursday 7 May to Sunday 10 May	
7	Thursday 14 May to Sunday 17 May	Alert level 2
8	Thursday 21 May to Sunday 24 May	
9	Thursday 28 May to Monday 1 June	
10	Thursday 4 June to Sunday 7 June	Alert level 1
11	Thursday 11 June to Sunday 14 June	
12	Thursday 18 June to Sunday 21 June	
13	Thursday 25 June to Sunday 28 June	
14	Thursday 2 July to Sunday 5 July	
15	Thursday 16 July to Sunday 19 July	Alert Level 3 (AKL) Alert level 2 (Rest of NZ)
16	Thursday 30 July to Sunday 2 August	
17	Thursday 20 August to Sunday 23 August	Alert Level 2.5 (AKL) Alert level 2 (Rest of NZ)
18	Thursday 27 August to Sunday 30 August	
19	Thursday 3 September to Sunday 6 September	
20	Thursday 17 September to Sunday 20 September	



# Report notes (ii)

## Key transport terms and demographic groupings

There are a number of transport terms used in this report. Below are key terms with definitions:

**Public transport (PT):** refers to bus, train and ferry and does not include taxi/uber services and private hirer vehicles (these will be treated separately in the analysis).

**Private vehicle (PVT):** refers to car, van, motorcycle or scooter, and does not include e-bikes.

**Active modes:** refers to walking (of at least 10 mins) and cycling, including e-bikes.

There are a number of demographic subgroup terms used in this report. Below are key groups with definitions:

**Any disability:** All respondents indicating that they have a great deal of difficulty or cannot do the following: seeing, even when wearing glasses; hearing, even with a hearing aid; walking or climbing steps; remembering or concentrating; washing or dressing; communicating in their usual language.

**COVID-19 vulnerable:** All respondents indicating that they personally have a medical condition that makes them acutely vulnerable to COVID-19, such as heart disease, hypertension, chronic respiratory disease or cancer.

# Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 - 16		Waves 17 - 18		Wave 19 - 20	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MOE*	Sample	MOE*
Total		n=5,060	1.38	n=2,532	1.95	n=5,043	1.38	n=7,561	1.13	n=2,455	1.98	n=2,626	1.91
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=1,324	2.69	n=1,964	2.21	n=661	3.81	n=676	3.77
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=599	4.0	n=200	6.93	n=197	6.98
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0	n=200	6.93	n=217	6.65
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=1,129	2.92	n=311	5.56	n=357	5.19
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=601	4.0	n=200	6.93	n=200	6.93
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=607	3.98	n=200	6.93	n=208	6.79
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=1,328	2.69	n=2,061	2.16	n=683	3.75	n=771	3.53
<b>Disability, Vulnerability and COVID-19**</b>													
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=866	3.33	n=284	5.82	n=323	5.45
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=1,640	2.42	n=584	4.06	n=617	3.95
Aged 70 + years	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over	n=618	3.94	n=315	5.52	n=627	3.91	n=830	3.4	n=266	6.01	n=293	5.73

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

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

# Context: New Zealand COVID-19 timeline






## Section 2 – Waka Kotahi transport key findings summary

# Key findings – waves 1–20

## Waka Kotahi COVID-19 transport impact tracker

- Wave 20 of fieldwork is the fourth wave under a split level condition, with Auckland under a level '2.5' lockdown for a second week and the rest of New Zealand under level 2 for the fourth consecutive week.
- Nationally, infection concerns have for the most part stabilised, with minor regional variations present. Economic concerns are again for the most part unchanged, after initially experiencing an upsurge at the earlier stages of the latest community outbreak.
- Self-isolating behaviours have begun to soften as the threat of community transmission begins to subside, with one in four New Zealanders now self-isolating in some way. Aucklanders have been the main driver of this shift and are now at similar rates to that last seen in level 1.
- Last week saw some significant shifts in essential daily journeys, such as work and school trips, which were primarily being driven by changes in Aucklanders travel habits. This week however, sees relatively muted growth in work journeys, while school and education-related trips continue to recover in Auckland.
  - Retrospectively, daily essential journeys outside of Auckland have for the most part not been impacted by the last four weeks of level 2 restrictions. On the other hand, less common essential journeys, such as medical appointments and visiting vulnerable friends, have been more reactive to restrictions and are continuing to show a u-shaped recovery in the most recent wave.
- Similar to journeys, this week also sees relatively muted shifts in mode use at the national level, with the recovery in public transport use stalling and softening this wave despite changes to social distancing for these modes.
  - Although there have been reported declines in use across all public transport modes in Auckland, the most dramatic and significant falls have been for reported use of ferries and trains. In the case of the latter, this decline has most likely been driven by disruptions with the train network rather than being patronage initiated.
  - Outside of Auckland public transport usage is mostly unchanged, directionally lower for bus usage and directionally higher for other public transport modes.
  - Barriers to public transport use see transmission concerns declining, while accessibility concerns are on the increase, reflecting changes in transmission sentiment and network disruptions.
- There have been two significant policy changes regarding public transport use in the last four weeks that should have materially impacted perceptions: compulsory mask wearing and softening of social distancing. The latter change has seen directional improvements week on week for buses and trains, with perceptions now generally slightly more stronger than where they were at the beginning of the latest lockdown.
  - In fact, the perception of being able to social distance on trains is now slightly ahead of where it was in level 1.
- The proportion of Aucklanders returning to the workplace has edged higher this week, but is still some way short of where it was prior to the latest lockdown. This has a flow-on impact at the national level.
  - As noted last week, public transport continues to be dis-proportionately impacted by lock-downs, with a greater share of this commuter type working from home. Although the proportion impacted is down in level 2.5/2 compared to level 3/2, one in three public transport users remain working from home compared to around one in four among the total working population.
- The use of online shopping for grocery or other products continues to decline in Auckland this wave, with people returning to bricks and mortar. Conversely, out of Auckland use of almost all shopping channels whether they be offline or online have increased.

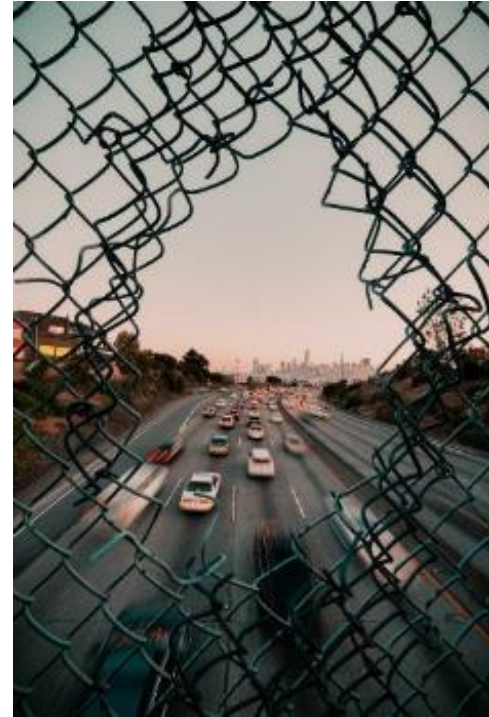


## Section 3 – Context

# Key findings – context

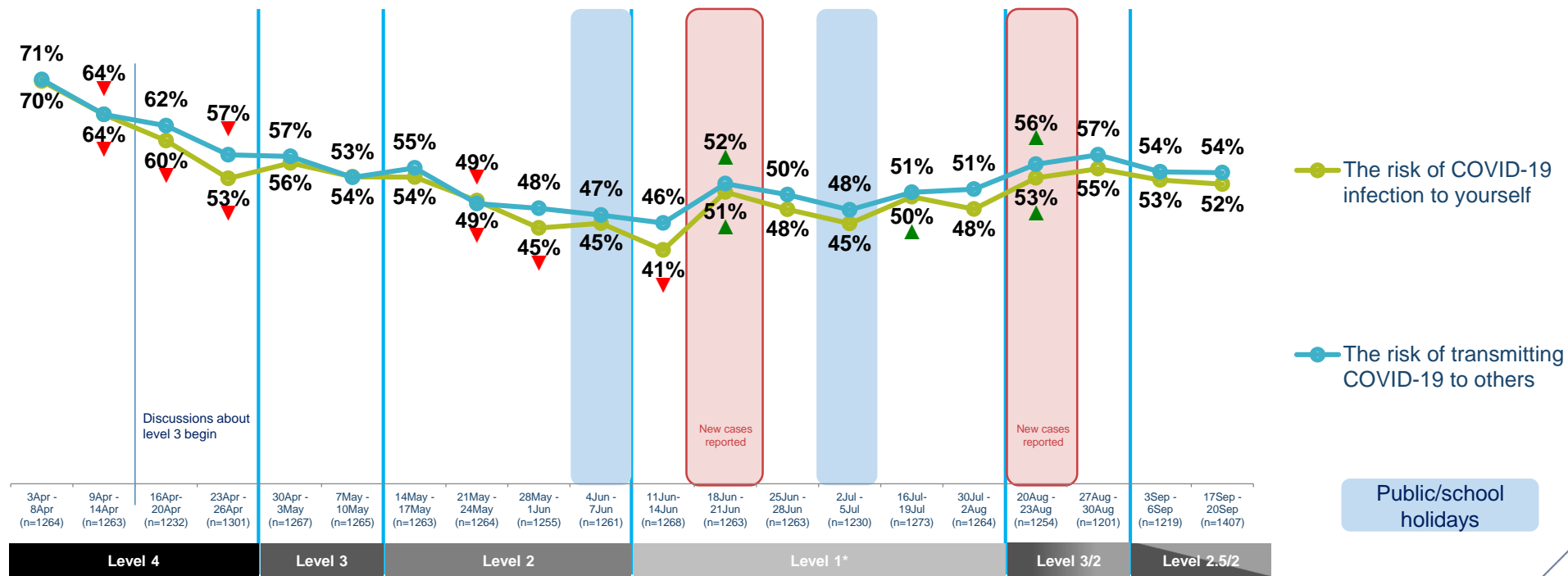
## Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- 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 in the second week of what has been called a level 2.5 lockdown in Auckland, with the rest of New Zealand in the third week under level 2, following a split level lockdown in response to community transmissions in Auckland.
- Nationally, concerns about infection have generally stabilised, and remain slightly higher than the previous level 2 lockdown. Concerns remain more salient in Auckland than elsewhere.
- Economic concerns have again seen little movement after an earlier reaction to Auckland's latest lockdown.
- Self-isolation behaviours have finally shifted in the second week of lower level restrictions, with now just under a quarter of people nationally reporting some form of self-isolating behaviour. The Auckland populace is driving this change and now sits at isolation levels similar to that before the re-introduction of restrictions in early August.
- Confidence levels with understanding what travel restrictions are in place have oscillated within a narrow range since May, with typically around two-thirds of people saying they are confident with how they should be travelling.
- Aucklanders have historically been less confident compared to the rest of New Zealand.



# Nationally, concerns about COVID-19 infection and transmission have stabilised, but remain higher than they were through the May/June level 2 lockdown

## 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

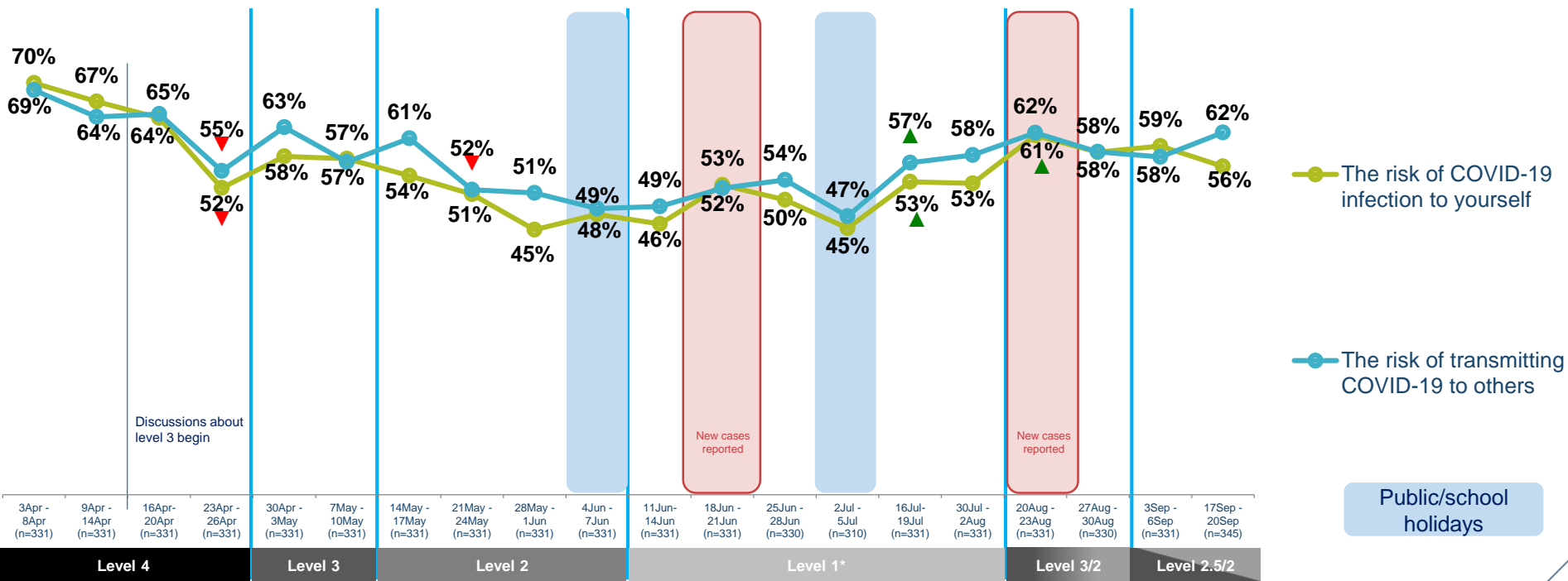


Indicates a statistically significant decrease from previous time period



# In Auckland, concerns about risk to self now sit at the lowest level since the second lockdown began, although concern about transmitting to others remains high

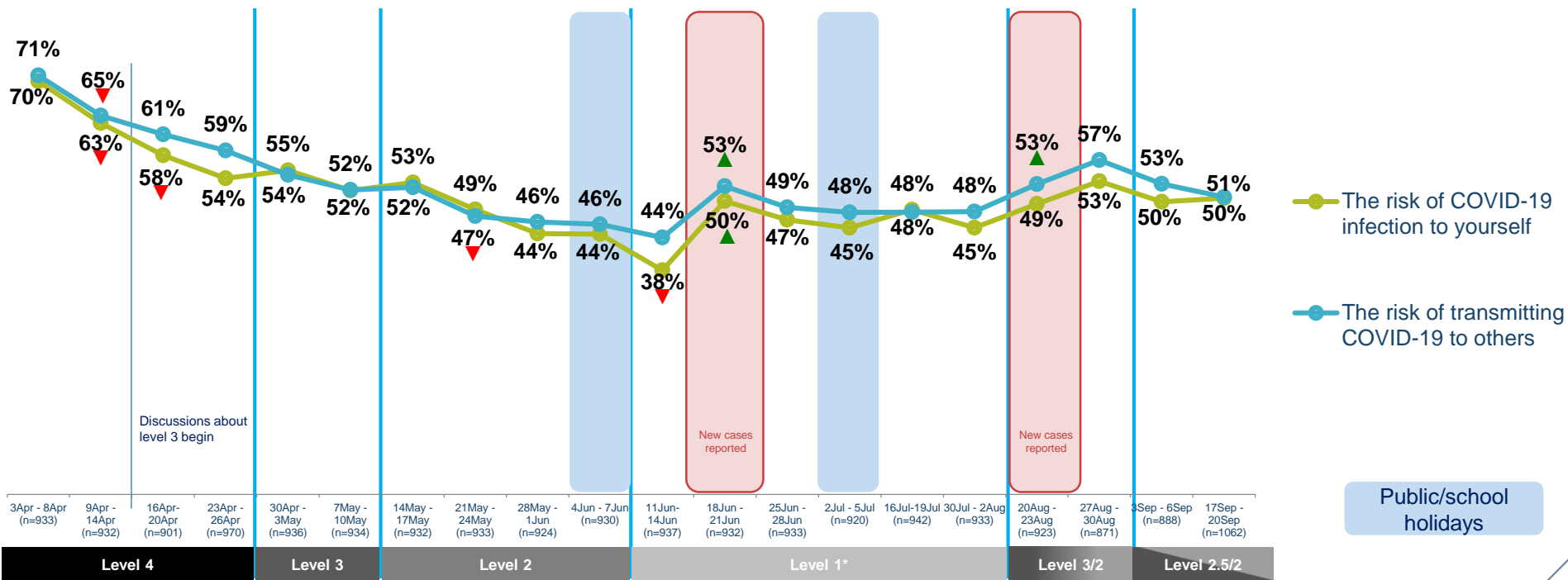
## COVID-19 concerns (NETT all concerned)- Auckland



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

# Outside of Auckland, concerns about transmission have continued to decline for a second consecutive wave, down six points since the end of August

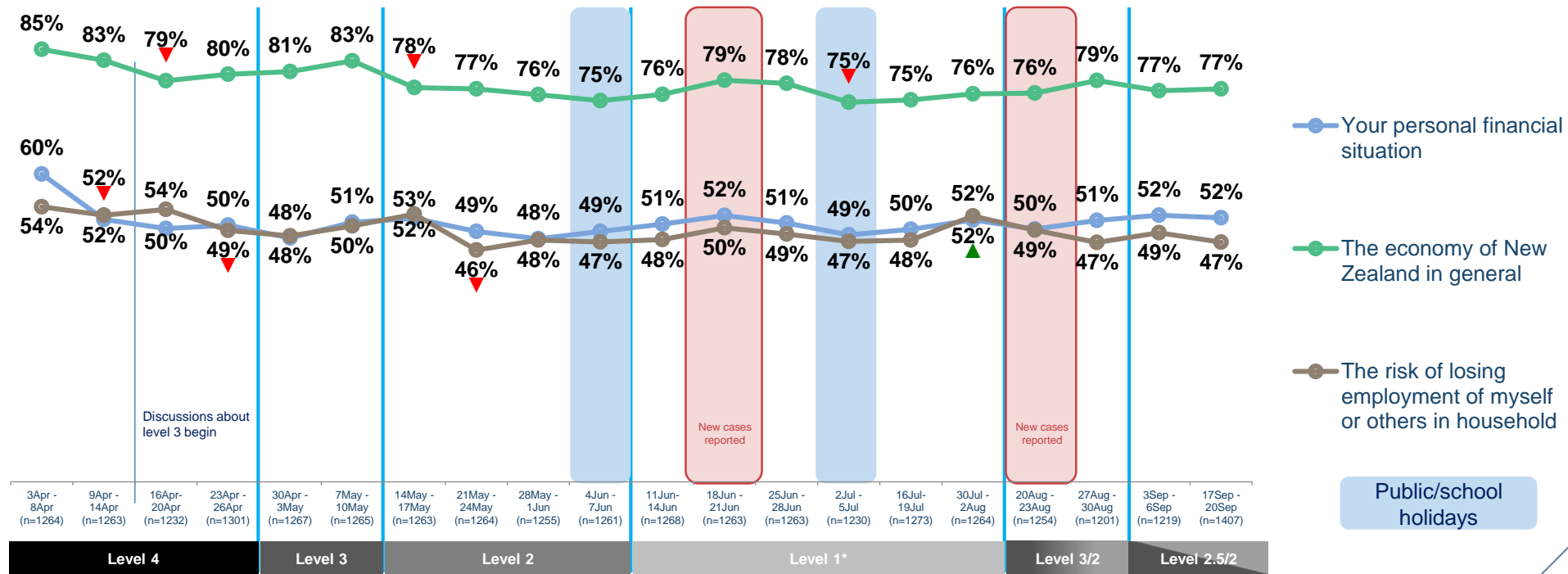
COVID-19 concerns (NETT all concerned) – rest of New Zealand



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

# Economic concerns have largely been stable throughout the second lockdown, moving by no more than 1-3 points per wave

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



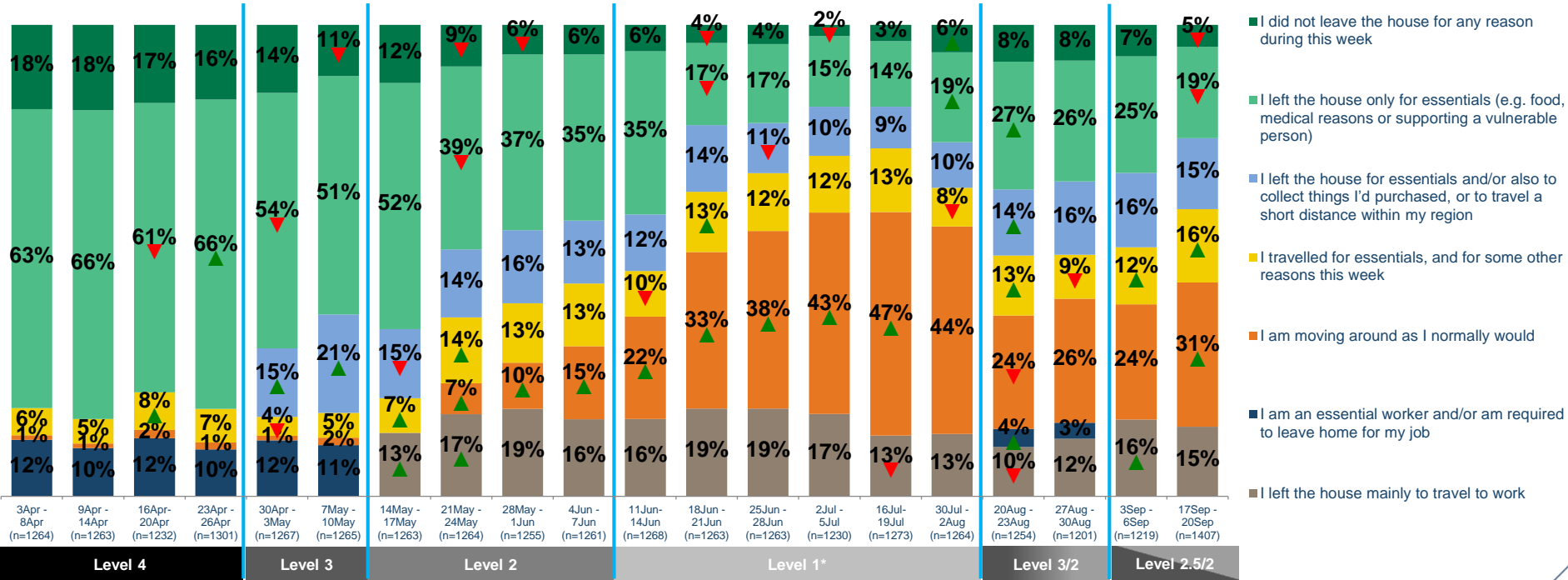
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Rates of self-isolation have experienced the first statistically significant drop since the latest round of lockdowns began in mid August

*Reported activity and movement during the past seven days by wave, excludes exercise*

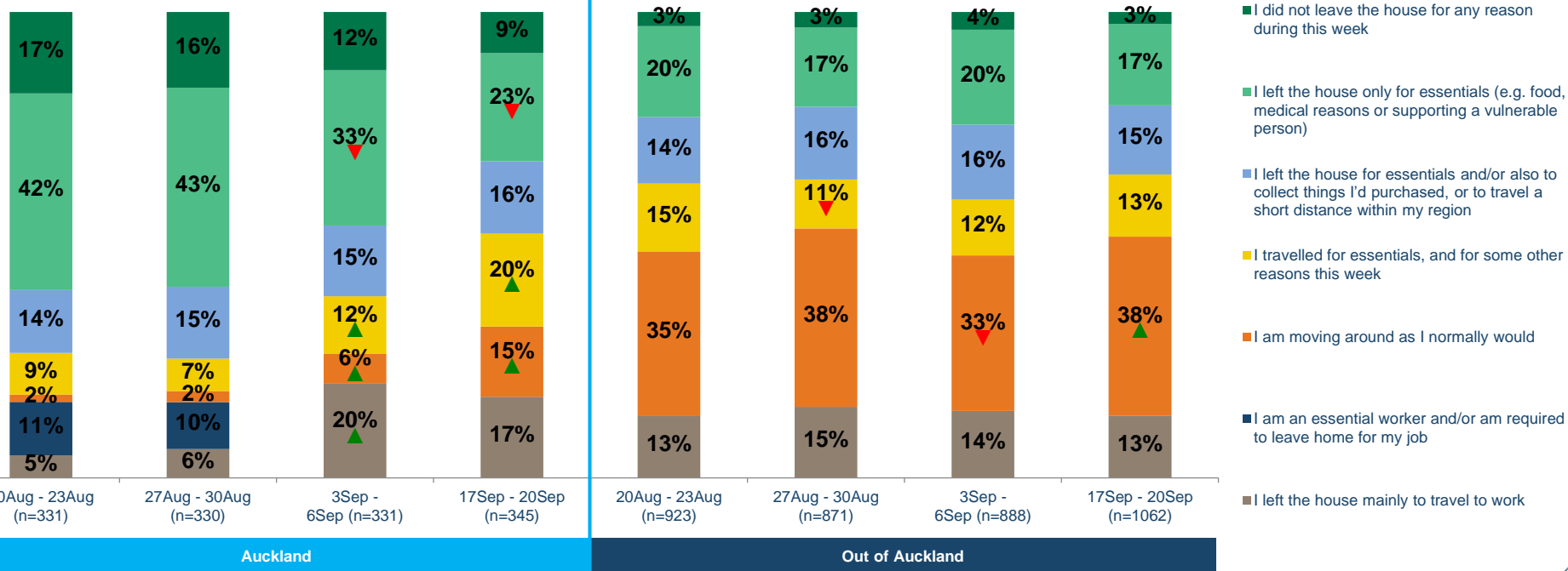


ISO\_1\_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

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

# Auckland has been the primary driver of decreasing isolation patterns, with big increases in those travelling for non-essential reasons during the past seven days

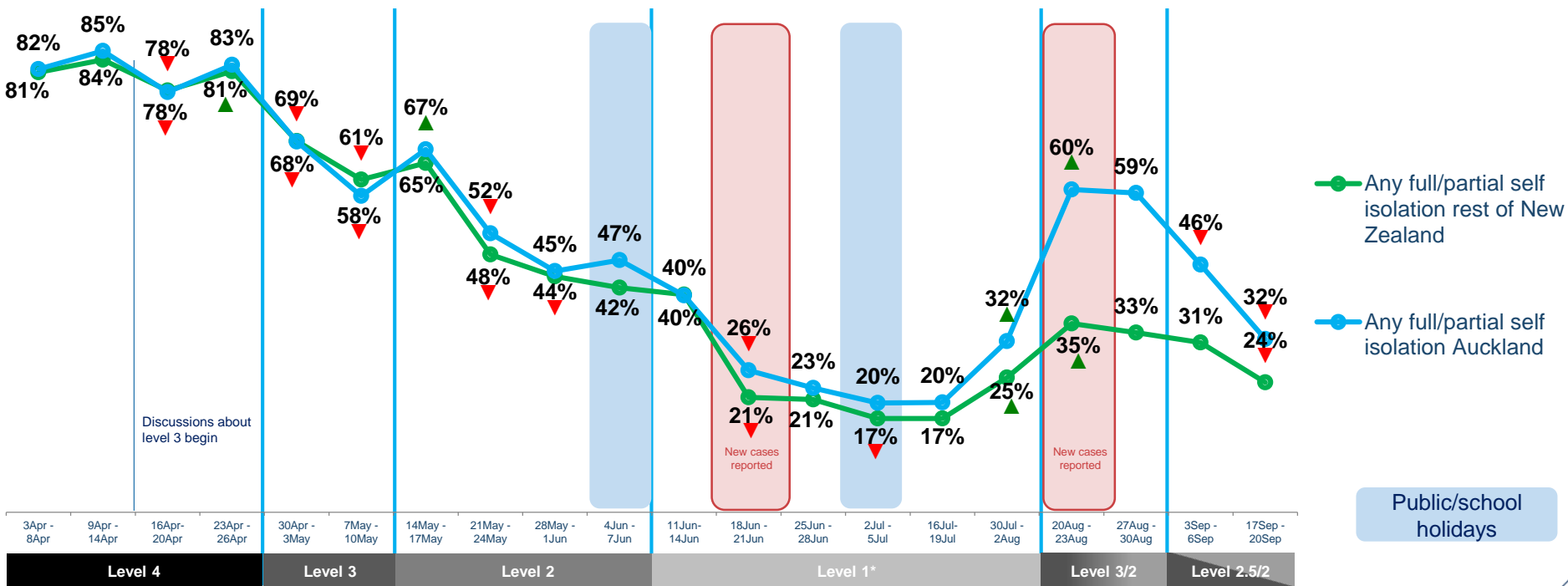
*Reported activity and movement during the past seven days by wave, excludes exercise*



QPTUSE3. How personally concerned are you about each of the following?  
 Base: all adults 15+ in New Zealand

# Self-isolation in Auckland now matches where the rest of New Zealand was a week ago and where it was prior to the latest round of lockdowns

## Self isolation over time

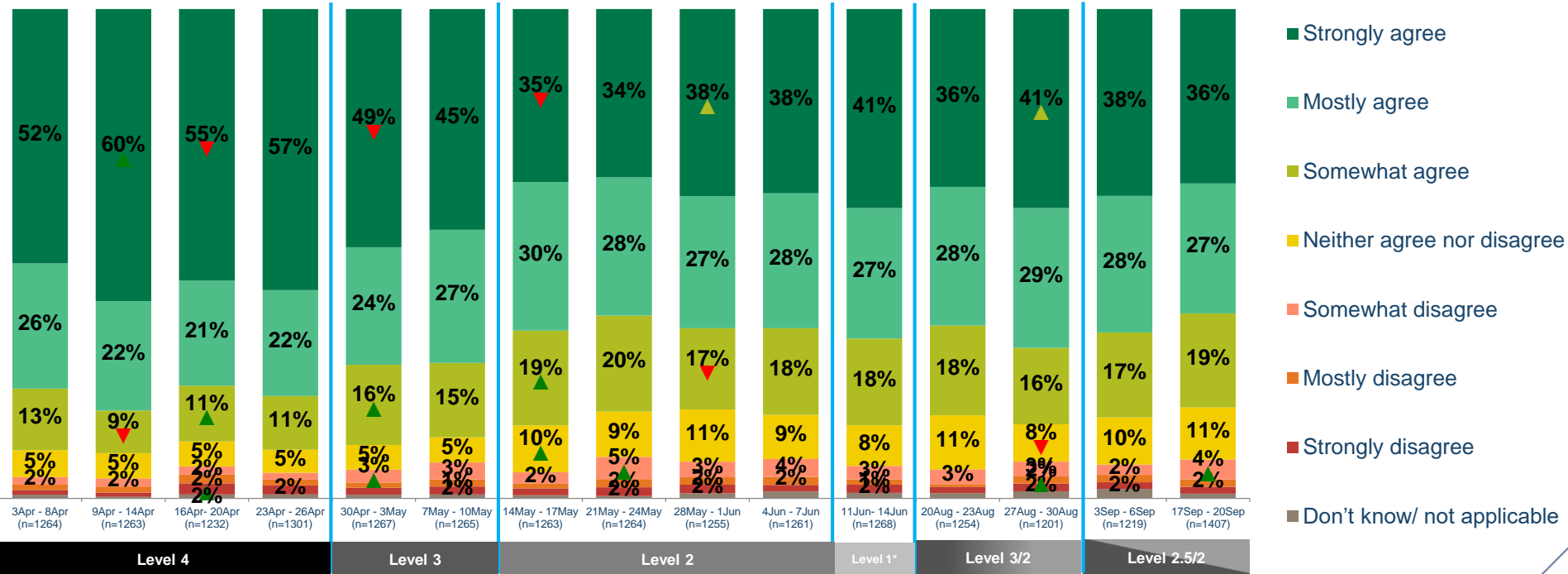


ISO\_1\_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

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

# Nationally, there has been some variation in confidence motivators during the second lockdown, but it is largely where it was during level 2 in May/June

*I feel confident I know what travel restrictions are in place when it comes to 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, statement suppressed for most waves during this time period



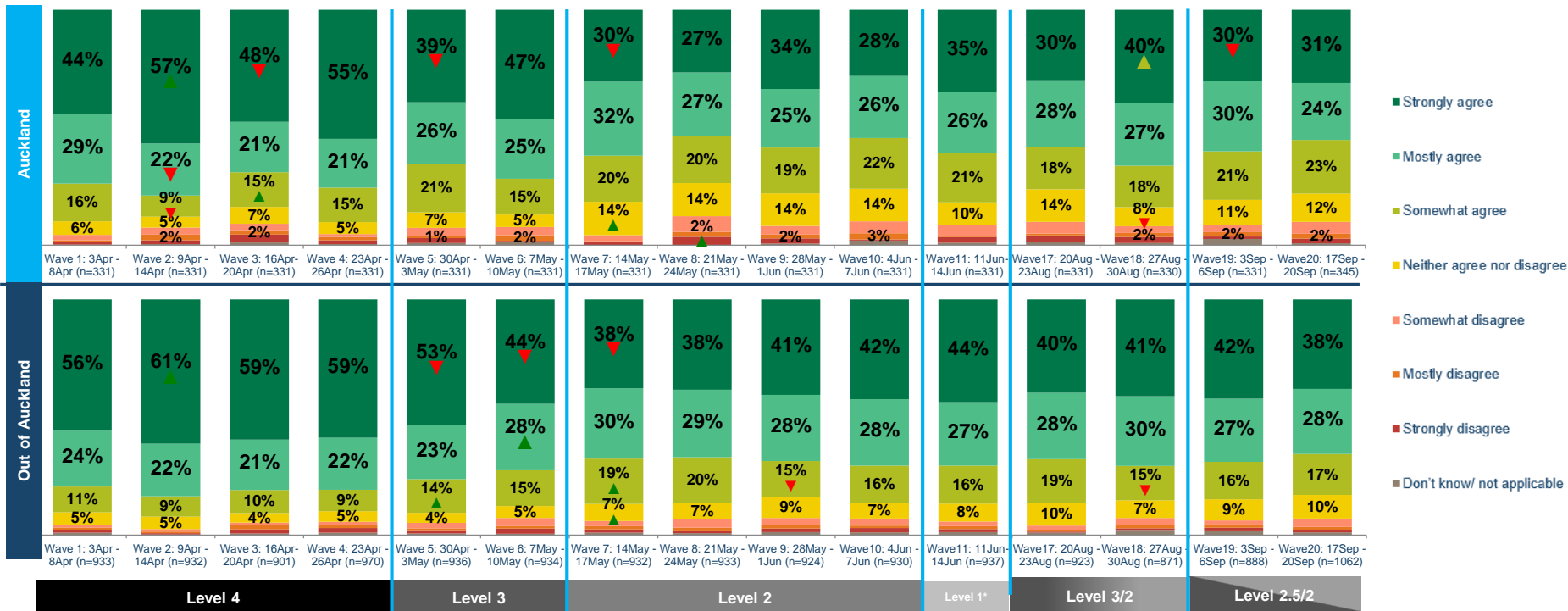
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Confidence has been particularly variable in Auckland, with big shifts either side of the level 3/2.5 change; Aucklanders have in general been less confident throughout

*I feel confident I know what travel restrictions are in place when it comes to leaving the house*



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

Base: all adults 15+ in Auckland/ Outside of Auckland \*fieldwork frequency decreased from weekly during level 1, statement suppressed for most waves during this time period





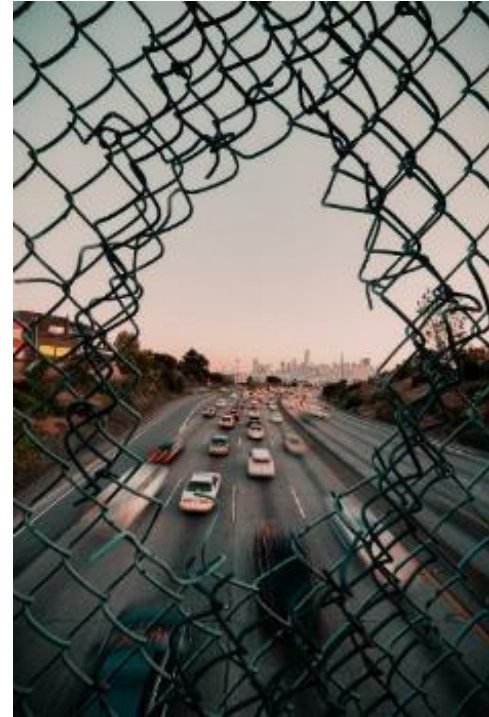


## Section 4 – Local and domestic journeys

# Key findings – Local and domestic journeys

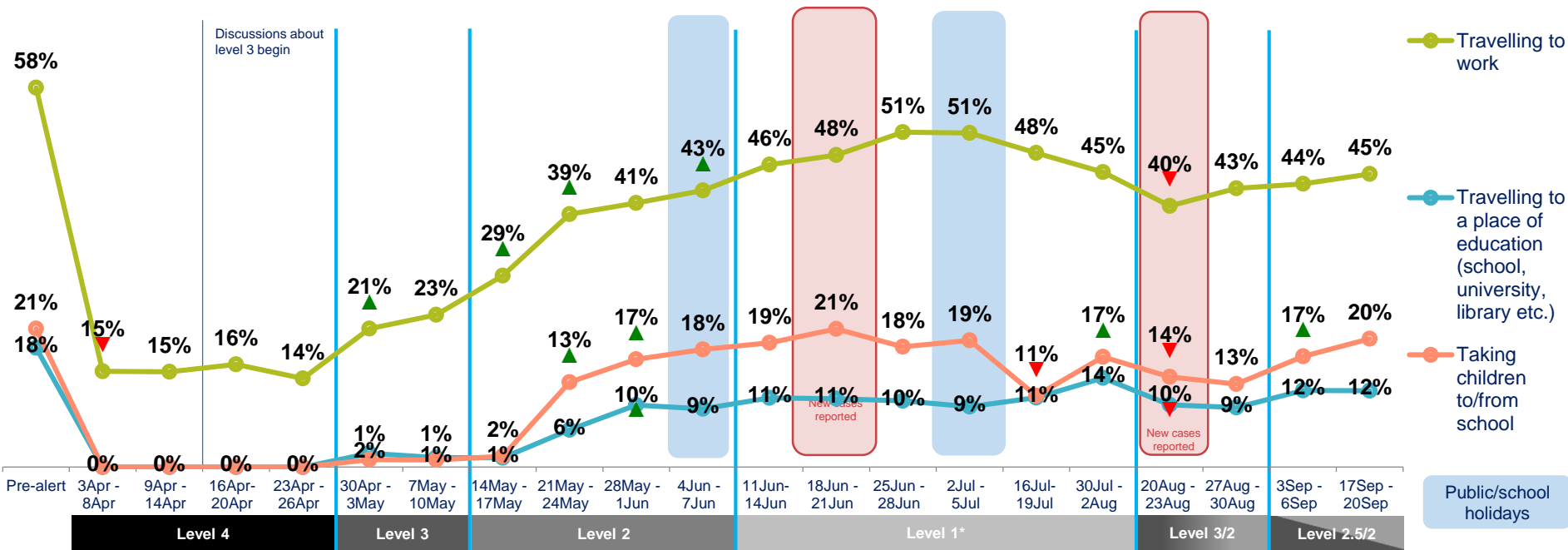
## Waka Kotahi objective – how is travel changing?

- 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.
- Last week there were major regional shifts in the proportion of work journeys, this week there's very little movement as Aucklanders settle into their second week of level 2.5.
- The journey movement of note in Auckland was the significant increase in school-runs, which has returned to levels last seen in level 1, reflecting Aucklanders lessening concerns with transmission.
- Outside of Auckland, the proportion reporting daily essential journeys has been relatively muted in response throughout the latest community outbreak.
- Other daily essential journeys, such as medical visits and supporting vulnerable friends, have lagged compared to work and education journeys, but this wave sees definite signs of recovery.
- Non-essential journey rates continue to recover, with these types of journeys mostly back to where they were outside of Auckland, but still to fully recover in Auckland.
- Longer domestic journeys to visits to friends and family have continued to recover and are now at similar levels to that prior to the end of July.



# Although it has yet to return to rates seen in level 1, the proportion travelling to work has recovered steadily since community transmission cases were announced

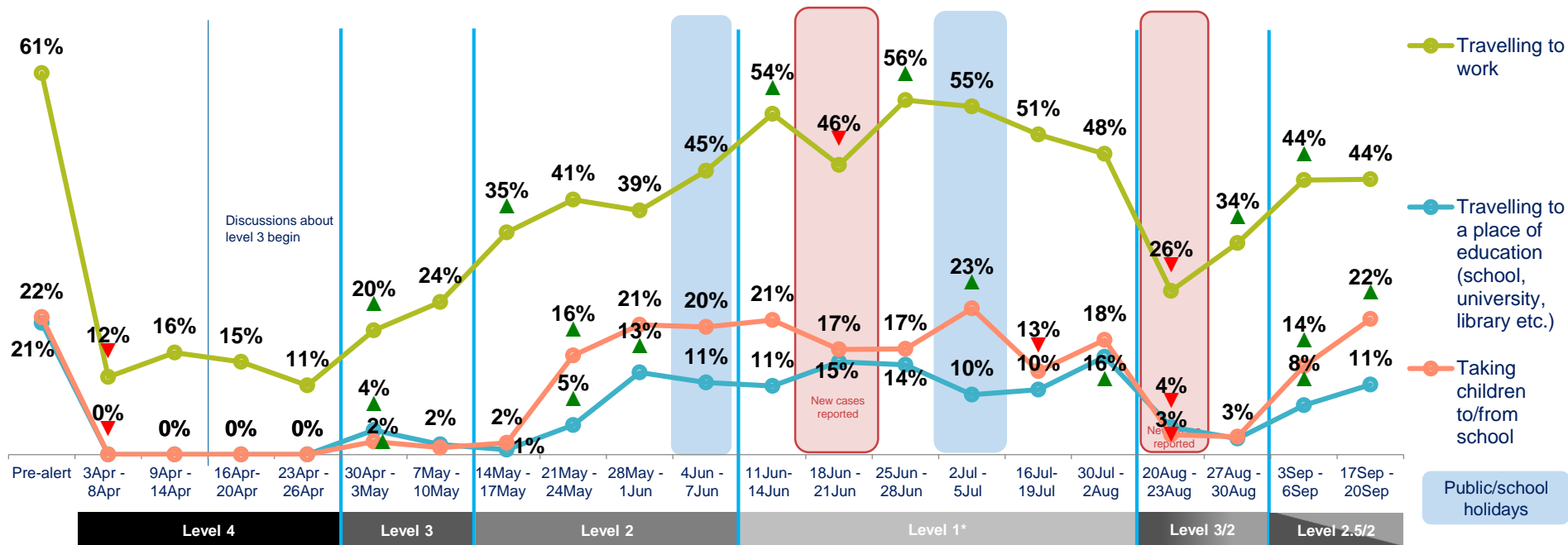
## Essential journeys



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 1-20 (n= between 1,230-1,300)

# In Auckland, work journeys have stabilised after two weeks of significant growth, but remain below the level 1 peak, whilst the school run is largely back to normal

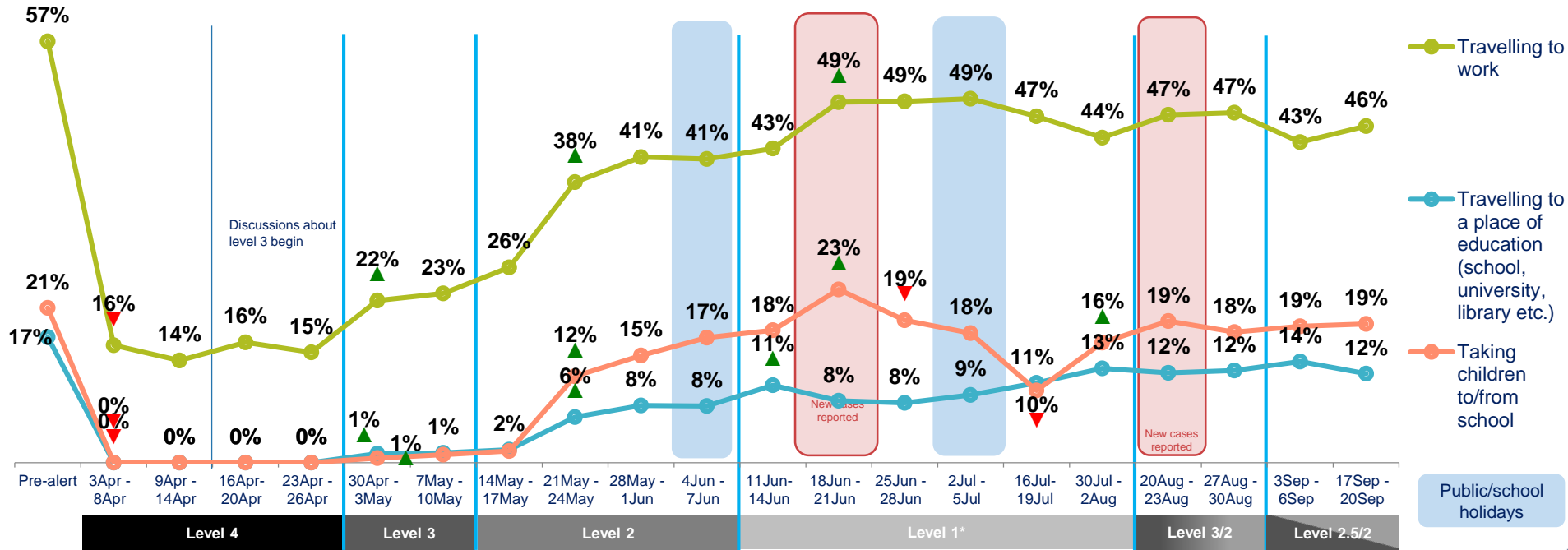
## Essential journeys – Auckland



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 Auckland in Benchmark: (n=c. 900); Wave 1–20 (n= c.330 per wave)

# Outside of Auckland, these daily essential journeys have largely carried on as normal through the new level 2 alert

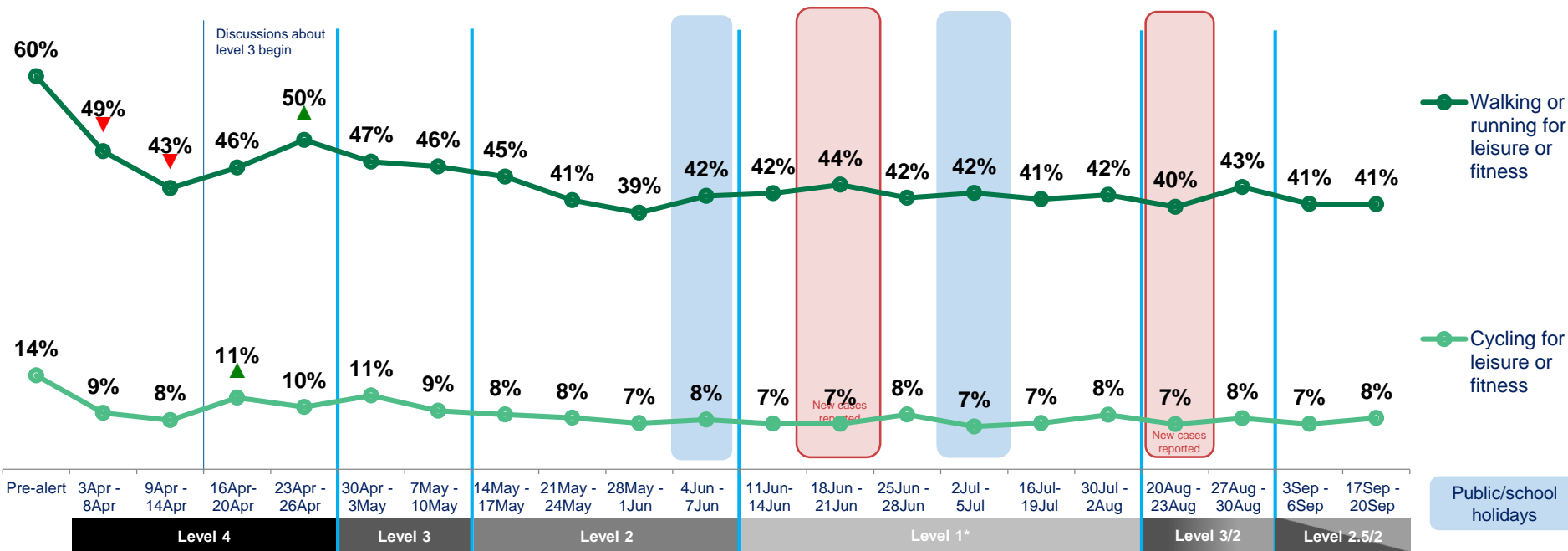
## Essential journeys – rest of New Zealand



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand outside of Auckland: (n=c.2,700); Wave 1–20 (n= c. 800 per wave)

# Trips taken specifically for leisure and fitness have been largely unaffected by the recent split level lockdowns, but haven't recovered to their level 4/3 peak in April/May

## 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 1-20 (n= between 1,230-1,300)



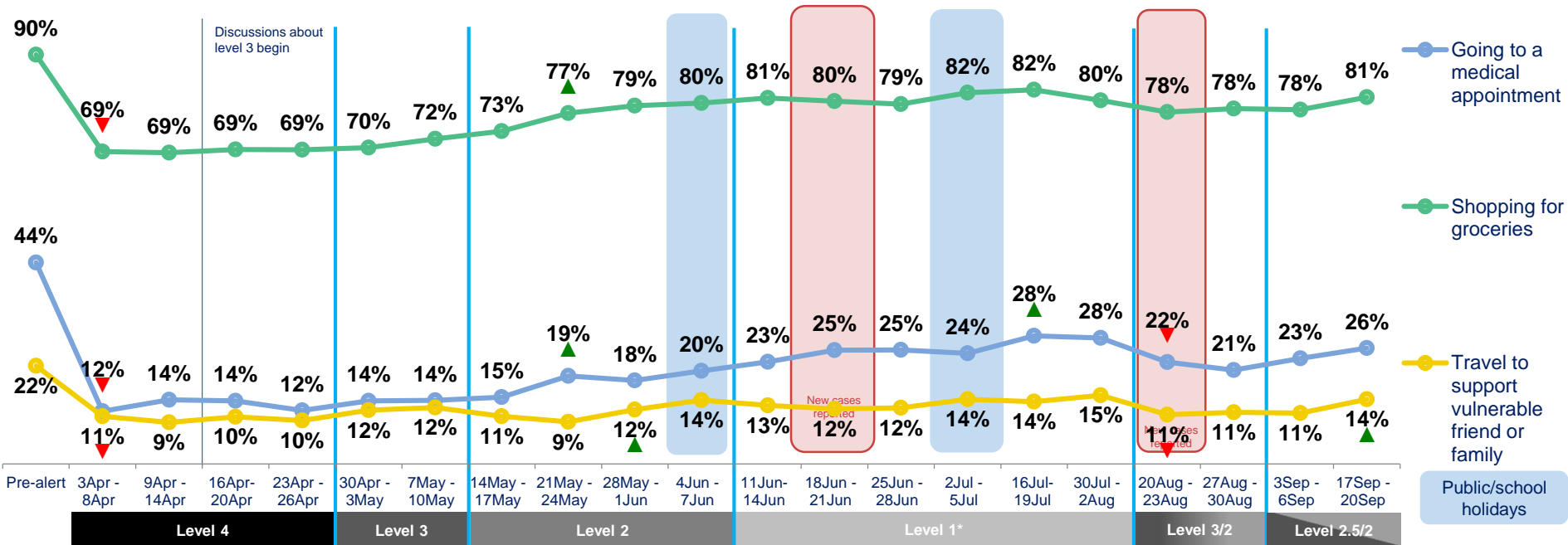
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Other essential journeys have begun to recover further this wave, particularly journeys to support the vulnerable

## Essential journeys

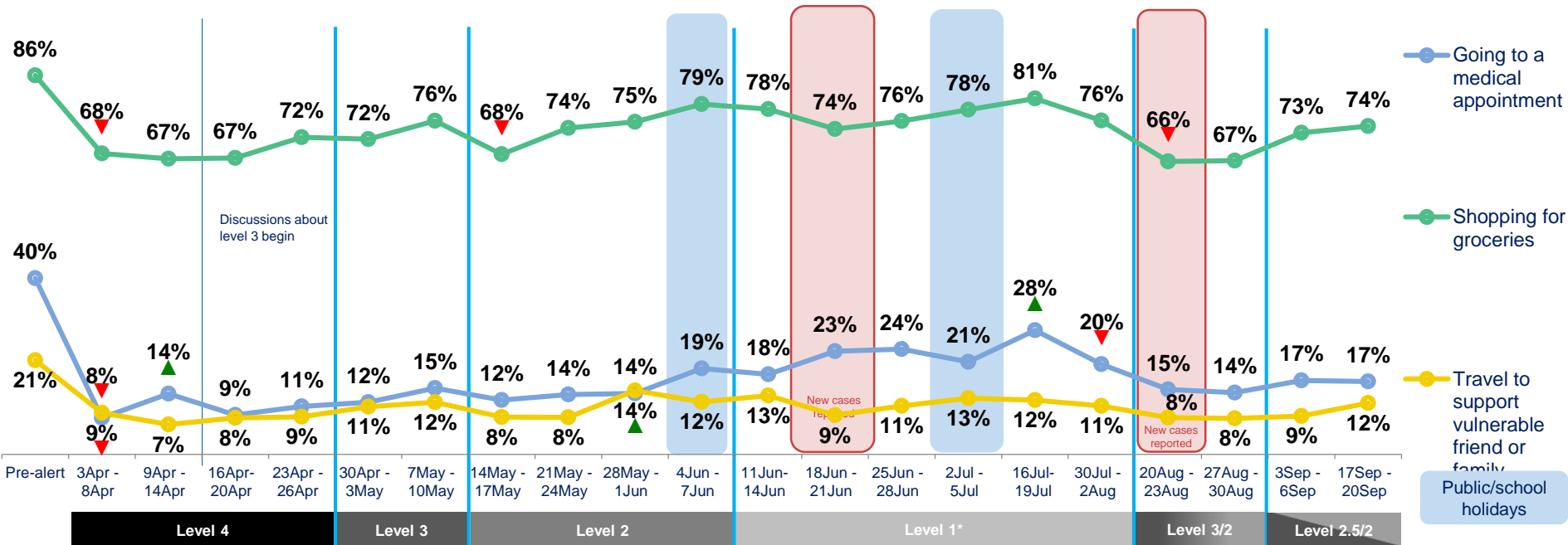


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1-20 (n= between 1,230-1,300)



# Shopping trips in Auckland have continued to edge higher and closer to previous levels, but medical appointments are still some way from returning to normal

## Essential journeys – Auckland

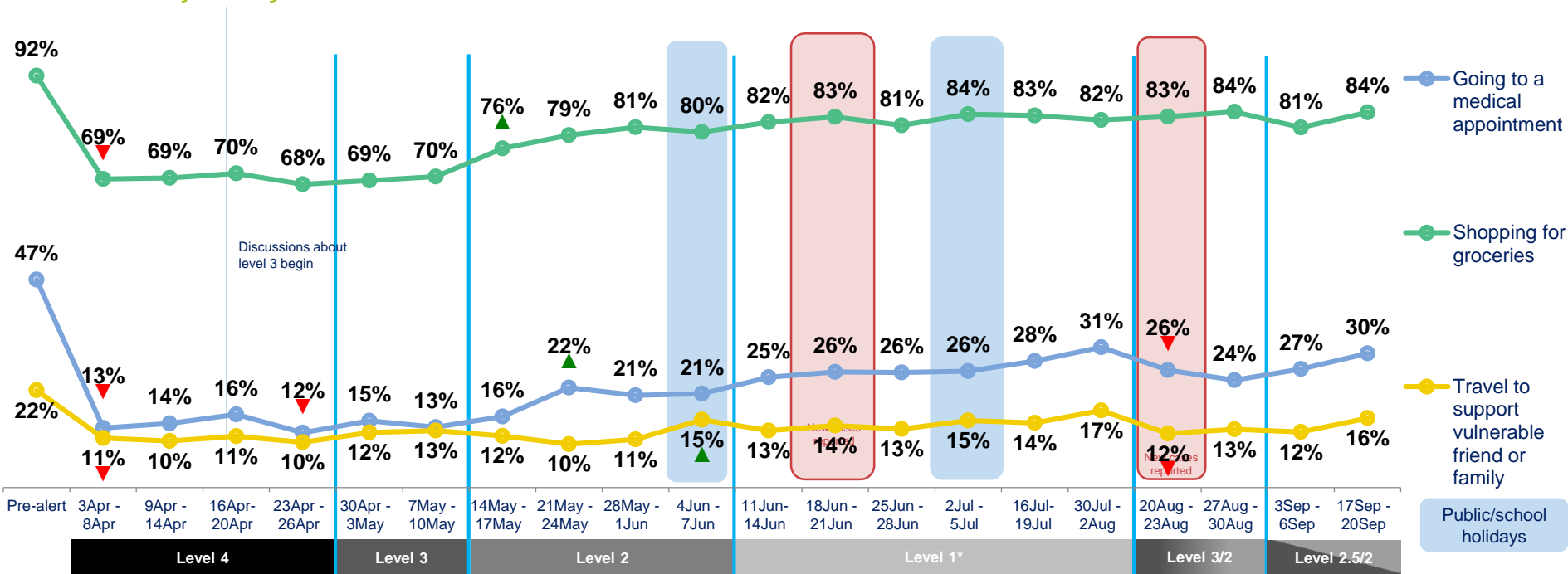


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Auckland in Benchmark: (n=c. 900); Wave 1–20 (n= c.330 per wave)



# Whereas outside of Auckland, all less frequent essential journeys have fully recovered to rates last seen in level 1

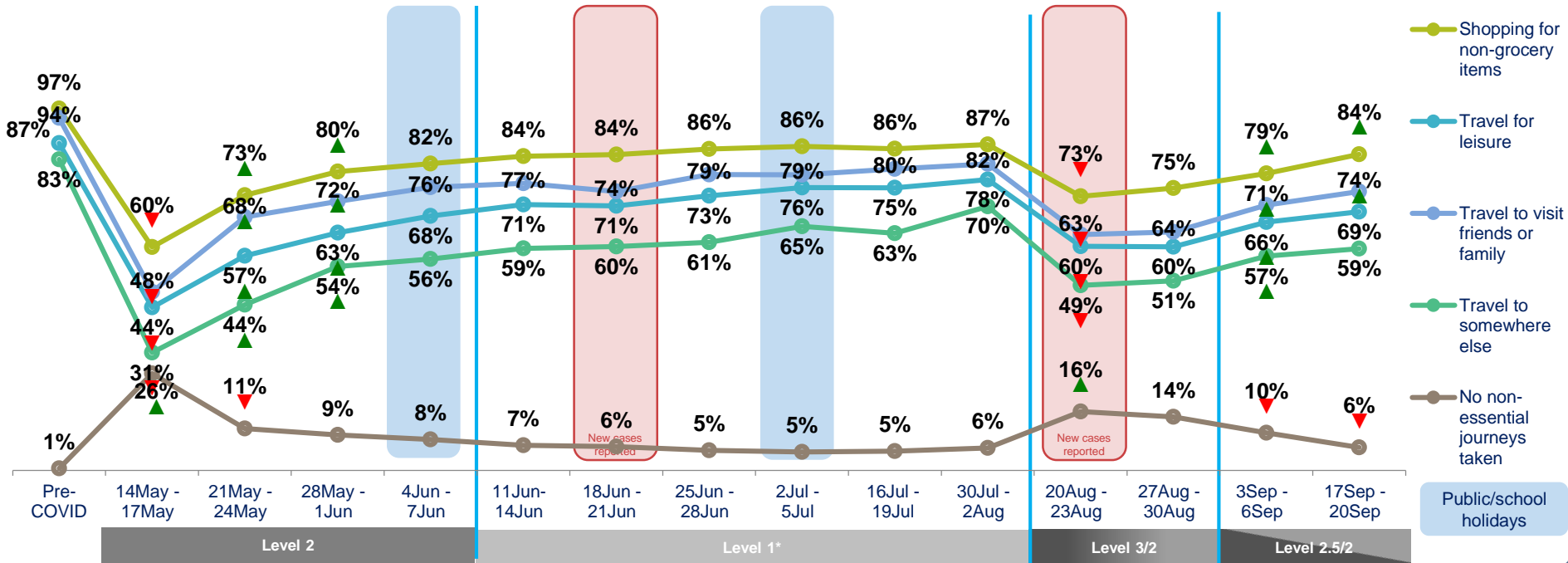
## Essential journeys – rest of New Zealand



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 outside of Auckland: (n=c.2,700); Wave 1–20 (n= c. 800 per wave)

# Non-essential journeys have continued to recover with non-grocery shopping almost back to rates seen at the end of level 1

## Non-essential journeys



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

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

Base: all adults 15+ interviewed during level 2, level 1, level 3/2 and level 2.5/2 in New Zealand (c. 1,200 per wave)



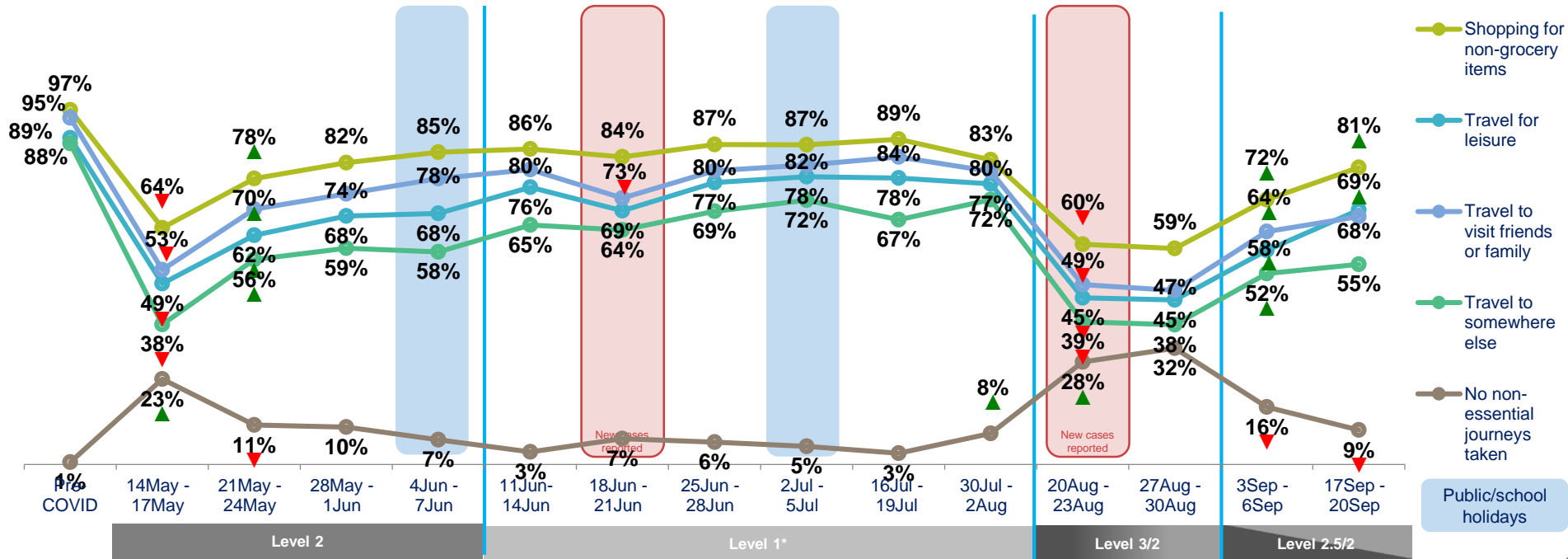
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# The past two weeks have seen significant recoveries in all types of non essential journeys in Auckland, but all are short of rates seen in level 1

## Non-essential journeys – Auckland



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

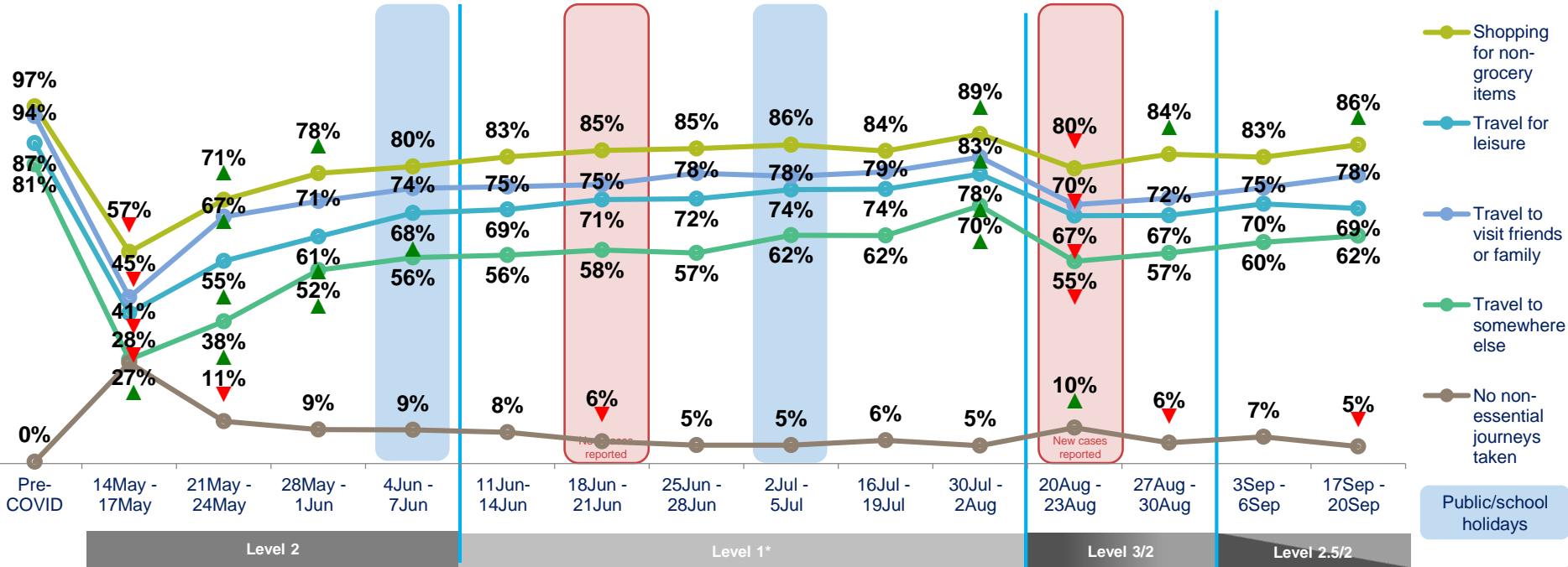
How, if at all did you make each of the journeys listed below in the past seven days?

Base: all adults 15+ interviewed during level 2, level 1, level 3/2 and level 2.5/2 in Auckland (n=c. 330 per wave)



# Outside of Auckland, non-essential journeys have mostly completed a recovery from the latest round of lockdowns

## Non-essential journeys – non-Auckland



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

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

Base: all adults 15+ interviewed during level 2, level 1, level 3/2 and level 2.5/2 Outside of Auckland (n=c. 930 per wave)



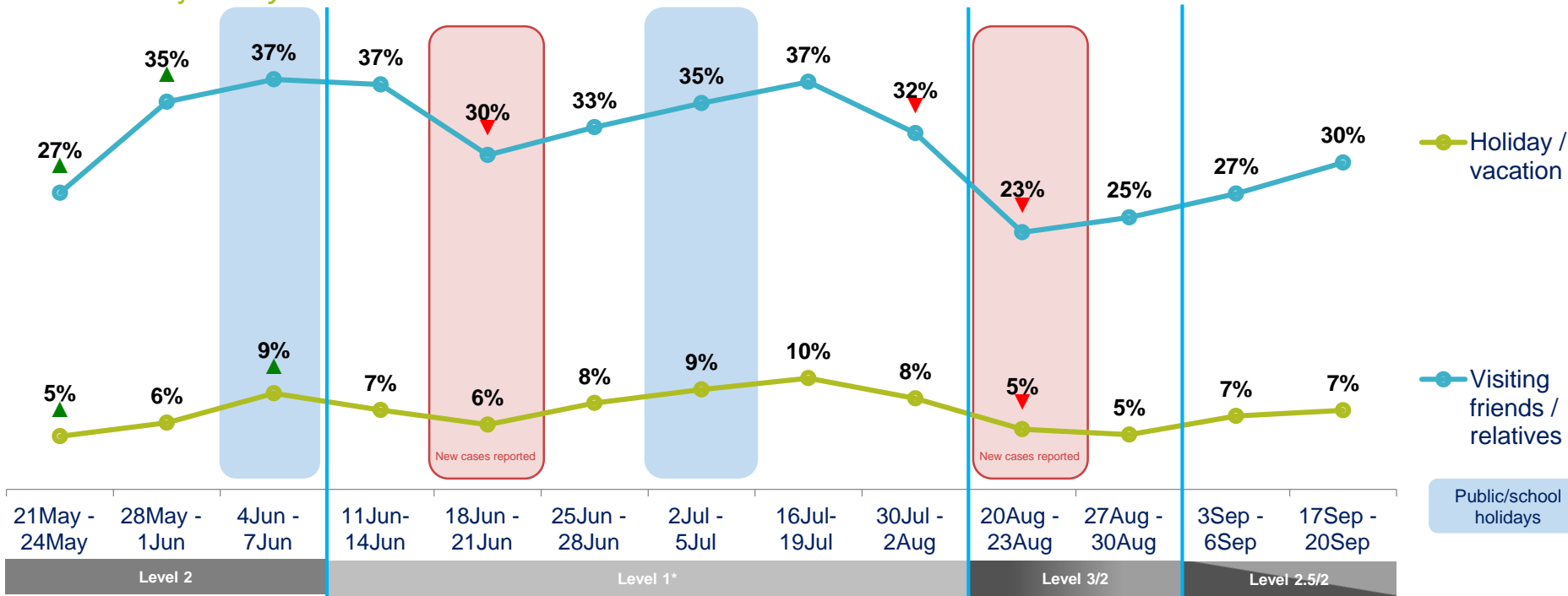
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Nationally, some inter-regional travel is returning, with a steady increase in visits to family and friends

## Domestic journeys

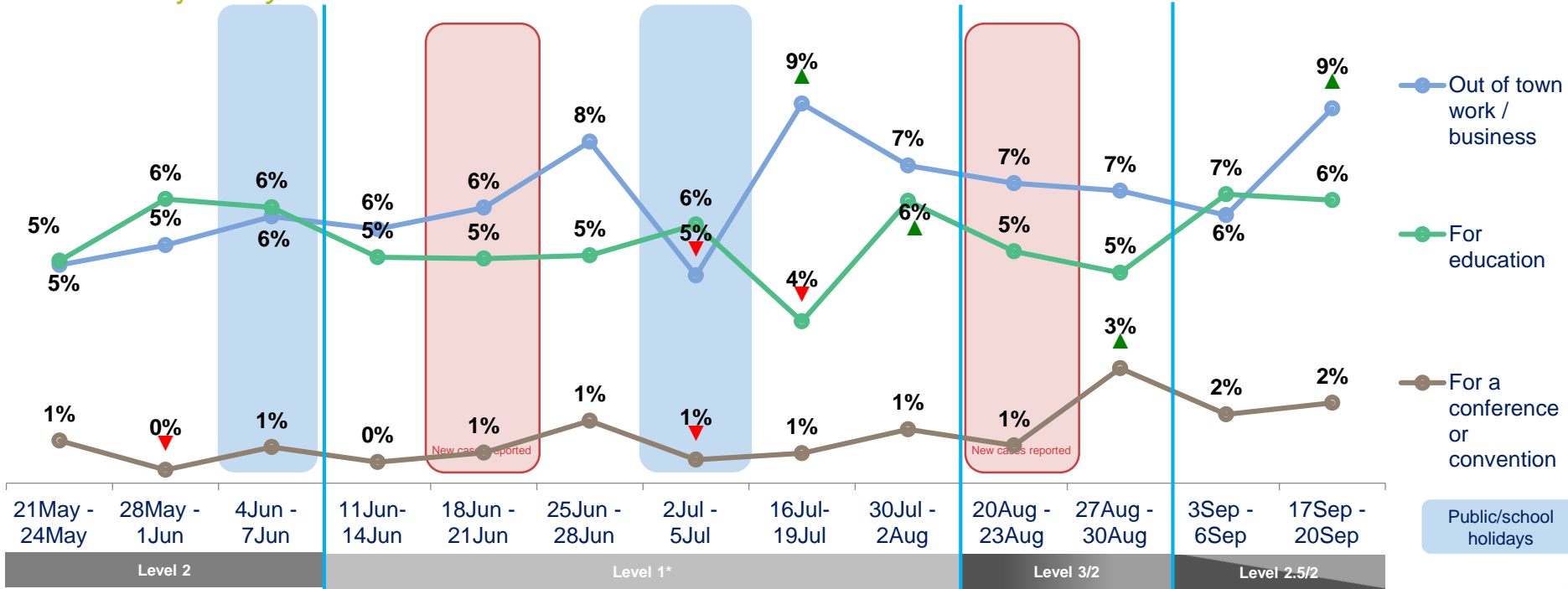


QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?



# Less leisure-oriented domestic journeys have always been a little more variable, but there has been some indication of a recovery in work trips this wave

## Domestic journeys



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



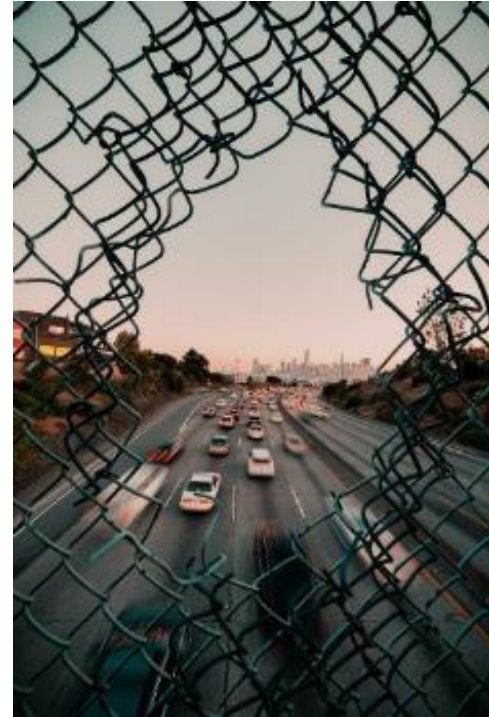


## Section 5 – Modal changes

# Key findings – modal changes

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

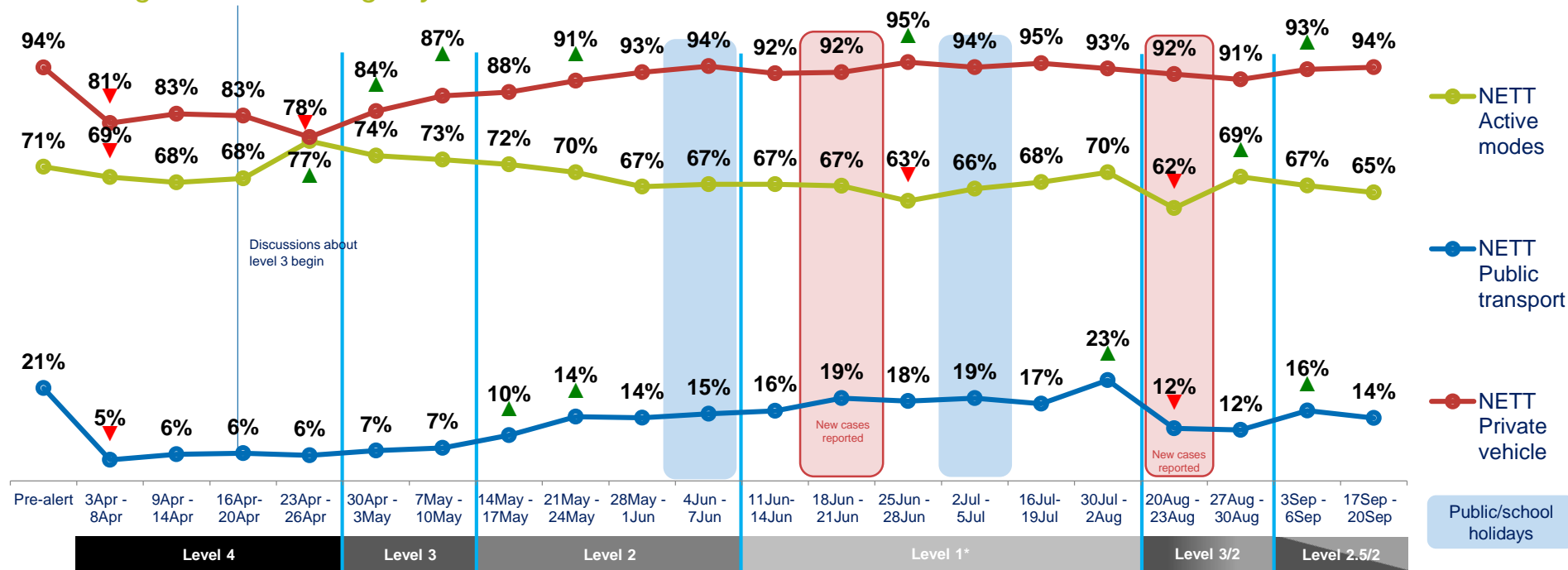
- Within the context of COVID-19 and changing travel restrictions it is important to understand how the transportation modes that New Zealanders are choosing have changed in response to this and which parts of the transport network are most impacted by these changes.
- Despite an official softening of social distancing requirements on public transport, shifts in the use of this mode are less dramatic this week compared to the previous, with the recovery in public transport stalling and softening a little this wave.
- This softening in public transport use is directionally stronger in Auckland, driven by significant declines in train and ferry use, with the former most likely impacted by disruptions to the train network that have a flow-on impact across the entire network.
- Outside of Auckland public transport usage is mostly unchanged, directionally lower for bus usage and directionally higher for other public transport modes. All public transport modes are yet to experience a step-change in recover to levels seen prior to the latest outbreak.
- Among those still not travelling as much by public transport, transmission barriers to use have begun to subside, with accessibility barriers now on the rise.





# Following a statistically significant increase at the start of the month, the proportion of weekly public transport users in New Zealand has not continued to recover

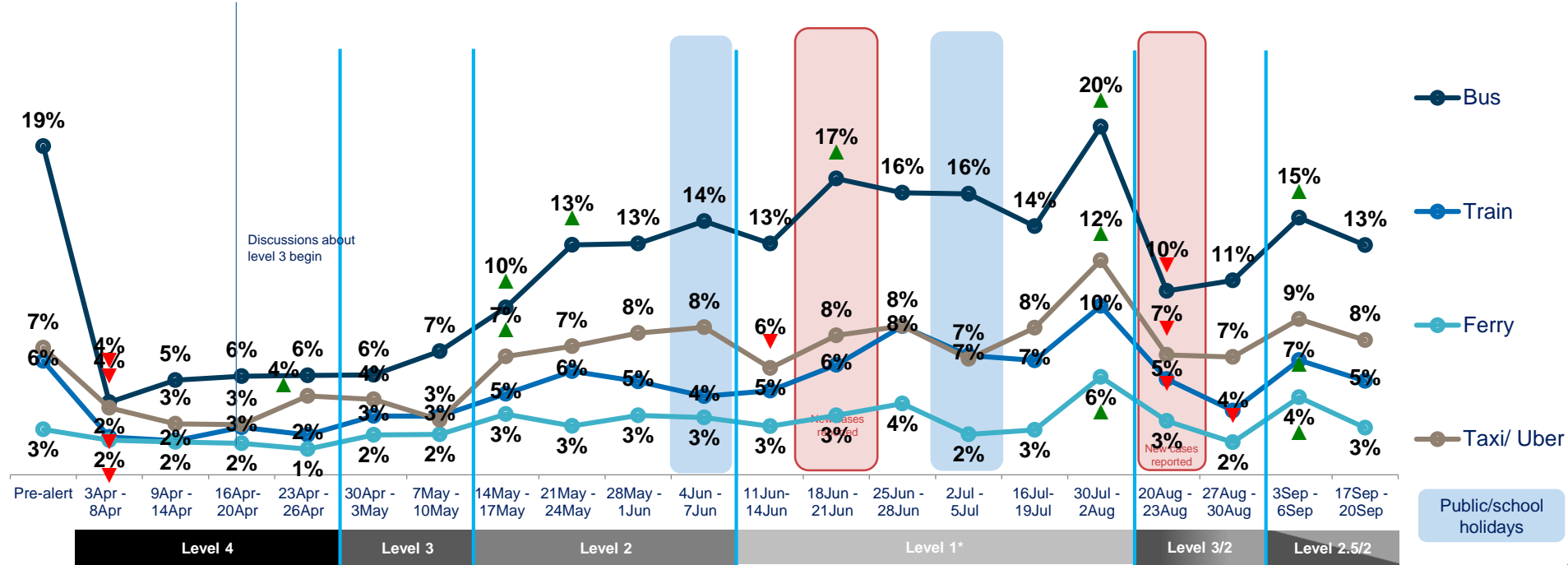
## Changes in mode usage by wave



QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (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

# Reported weekly usage of all public transport modes fell away slightly at the national level this wave

## Changes in mode usage by wave



QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (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



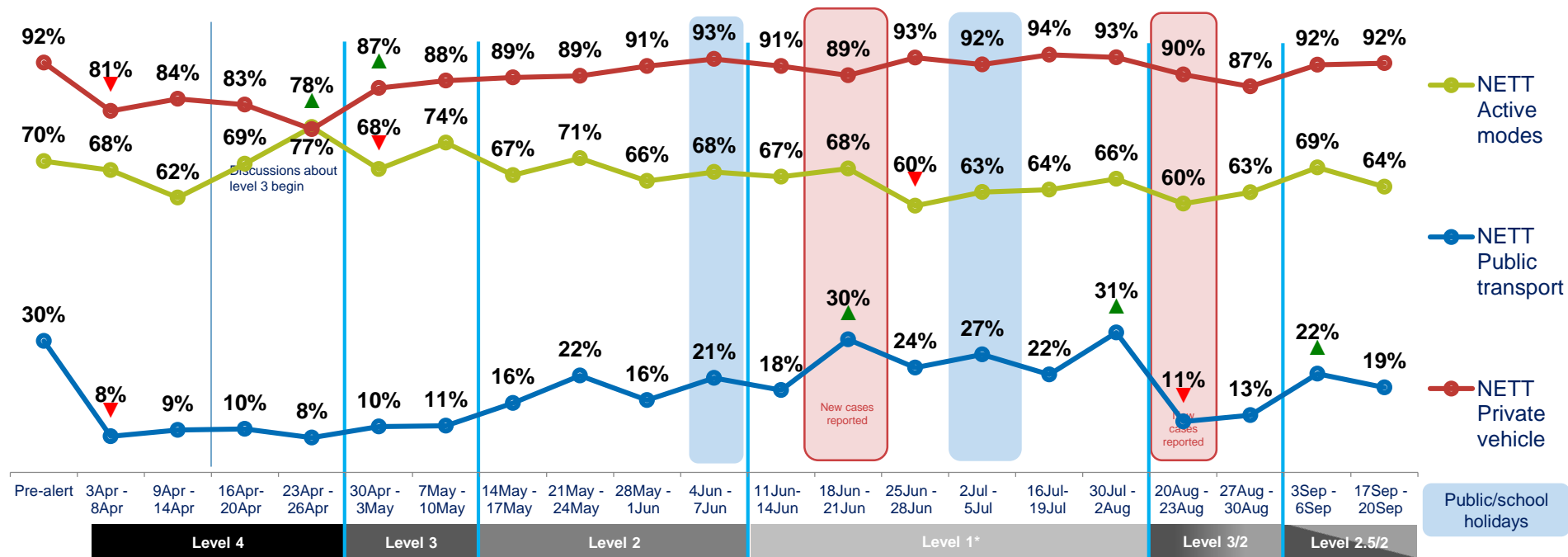
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# While reported public transport usage dropped 3 points during the latest week, the picture in Auckland mode use largely appears stable at the current level

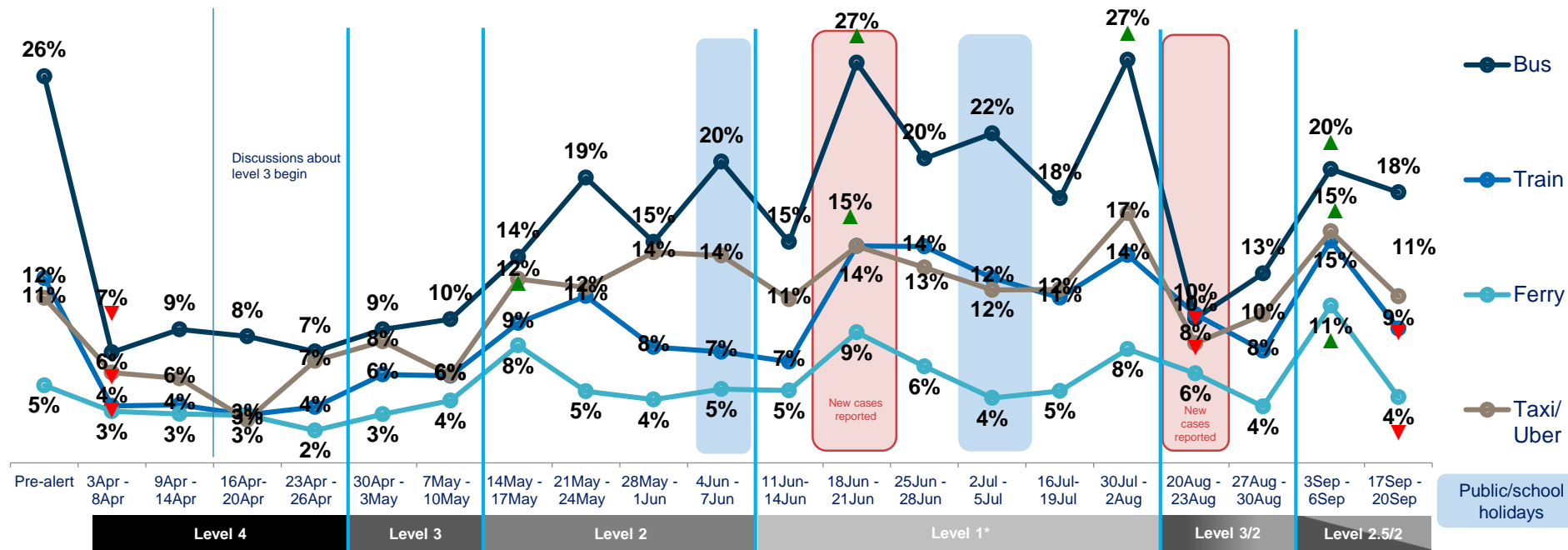
## Changes in mode usage by wave, Auckland



QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Auckland (n=c.330 per wave)

# Reported ferry and train usage fell most within Auckland, with the latter potentially related to rail network disruptions and repairs this week

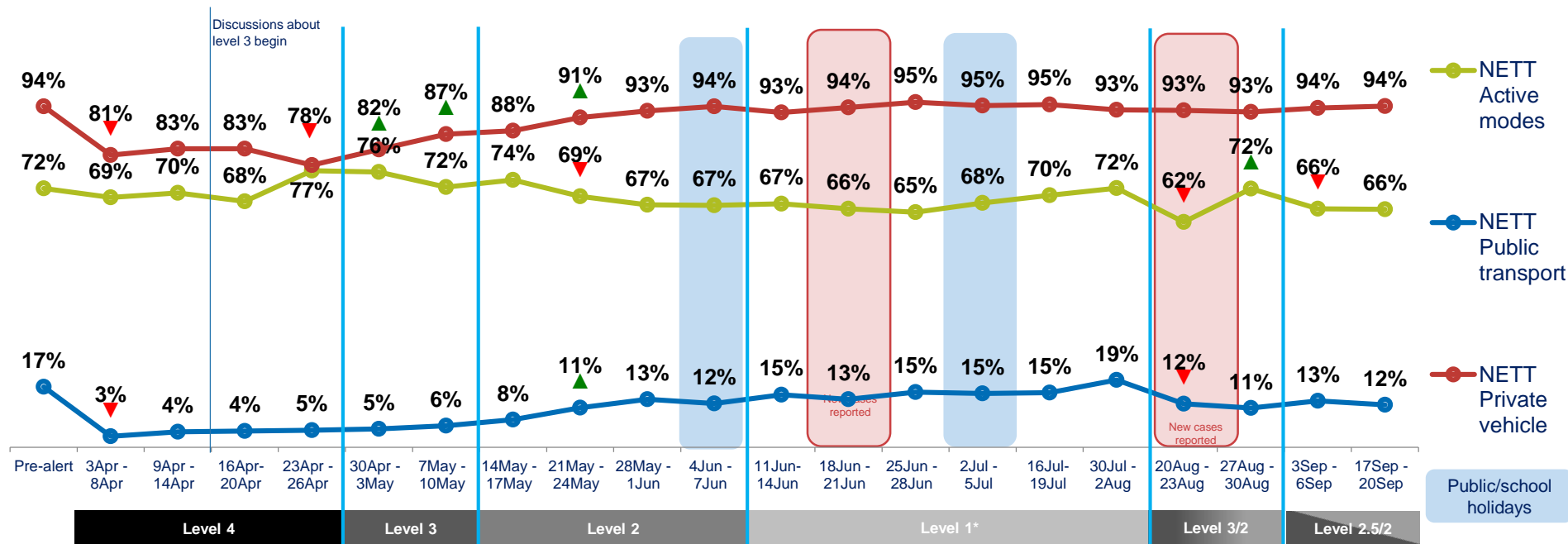
## Changes in mode usage by wave – Auckland



QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Auckland (n=c.330 per wave)

# Outside of Auckland, reported weekly usage rates for all three mode groups remained consistent with the previous wave

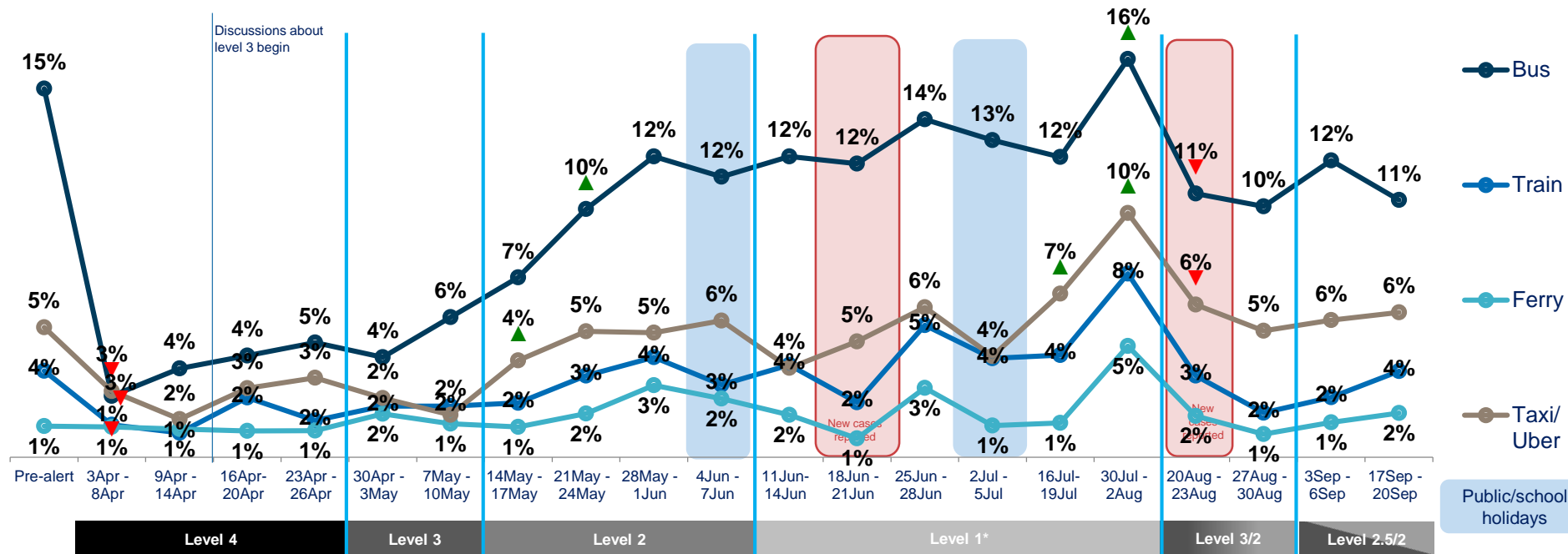
## Changes in mode usage by wave – non-Auckland



QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ not living in Auckland (n=c.900 per wave)

# Looking back at the four waves within this period, weekly usage of all public transport modes has been mostly unchanged since the start of the new lockdown

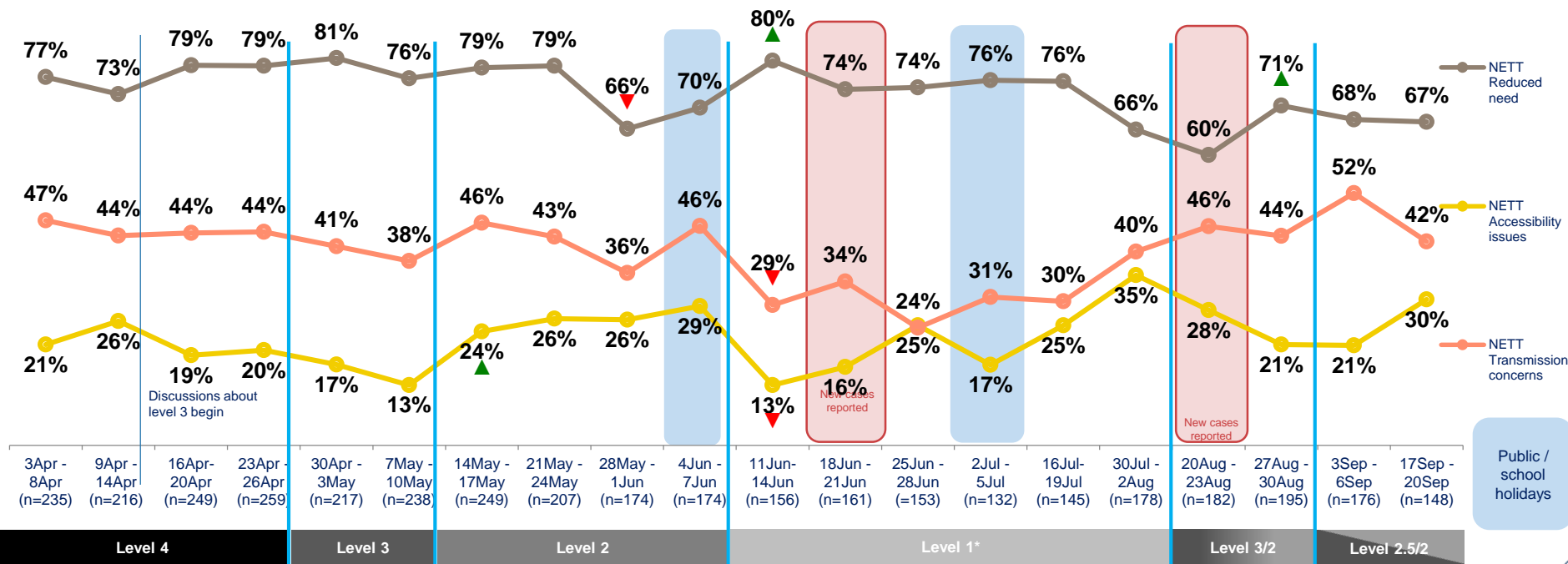
## Changes in mode usage by wave – non-Auckland



QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ not living in Auckland (n=c.900 per wave)

# Although not statistically significant, there has been a decrease in the saliency of transmission barriers and a corresponding increase in accessibility barriers

## 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



# Section 6 – Perceptions of transport modes



# Key findings – perceptions of transport modes

## Waka Kotahi objective – how might people's perception of transport modes impact travel choices

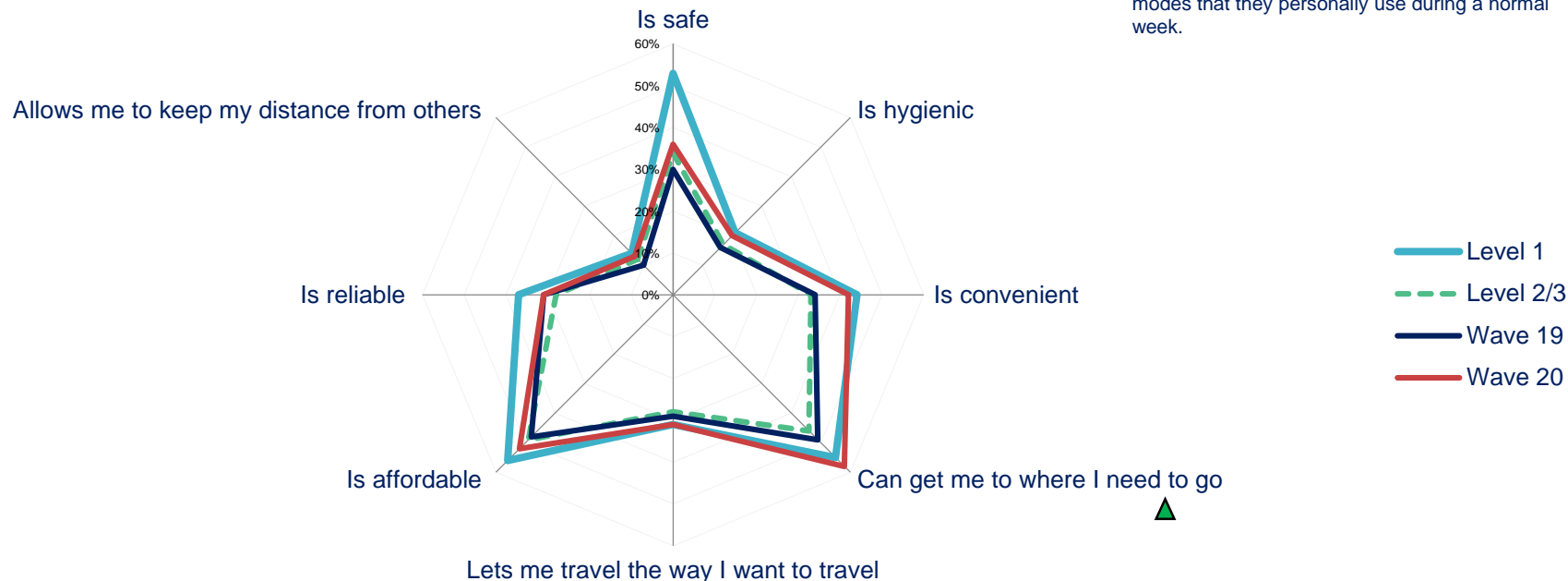
- The COVID-19 environment may over time change the way that New Zealanders perceive different modes of transport. This will be important to understand as these perceptions may impact people's travel patterns and behaviour.
- This week saw a significant change in government policy, revising the need for social distancing on public transport. When coupled with the implementation of compulsory wearing of face masks earlier in the most recent lockdown, public transport has undergone a number of significant policy changes in a short period of time and therefore it is instructive to compare more recent time periods to understand its impact.
- The softening of social distancing measures has had a notable impact on how passengers see buses, with perceptions now slightly more positive than at the beginning of latest lockdown period.
- Trains have also improved on many perceptions this wave and, like with buses, views are now slightly more positive than where they were at the beginning of the latest lockdown. In fact, perceptions of being able to socially distance are now stronger than in level 1.
- Perceptions of private vehicles have always been stronger throughout COVID-19 and some perceptions have strengthened further this wave. Perceptions of convenience and being able to get where need to go have significantly improved, which could be reflective of compulsory face masks and train network disruptions of late.



# Looking at recent time periods, the most recent week saw a significant recovery in the proportion who think the bus can get them where they need to go

## 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 (n=1,246), level 2/3 (n=360); wave 19 (n=189); wave 20 (n=191)



Indicates a statistically significant increase against wave 19

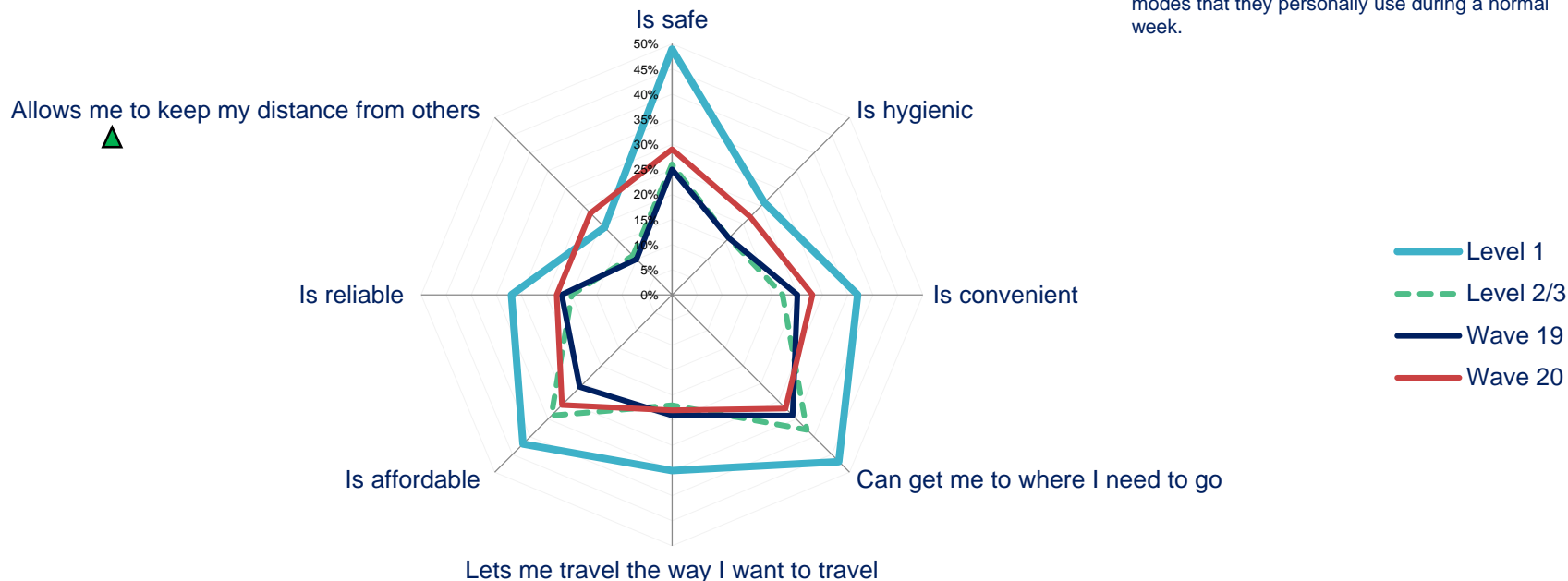


Indicates a statistically significant decrease against wave 19

# Perceptions of the train are still some way from matching where they were in level 1, although the most recent weekend has seen a significant gain on social distancing

## 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?

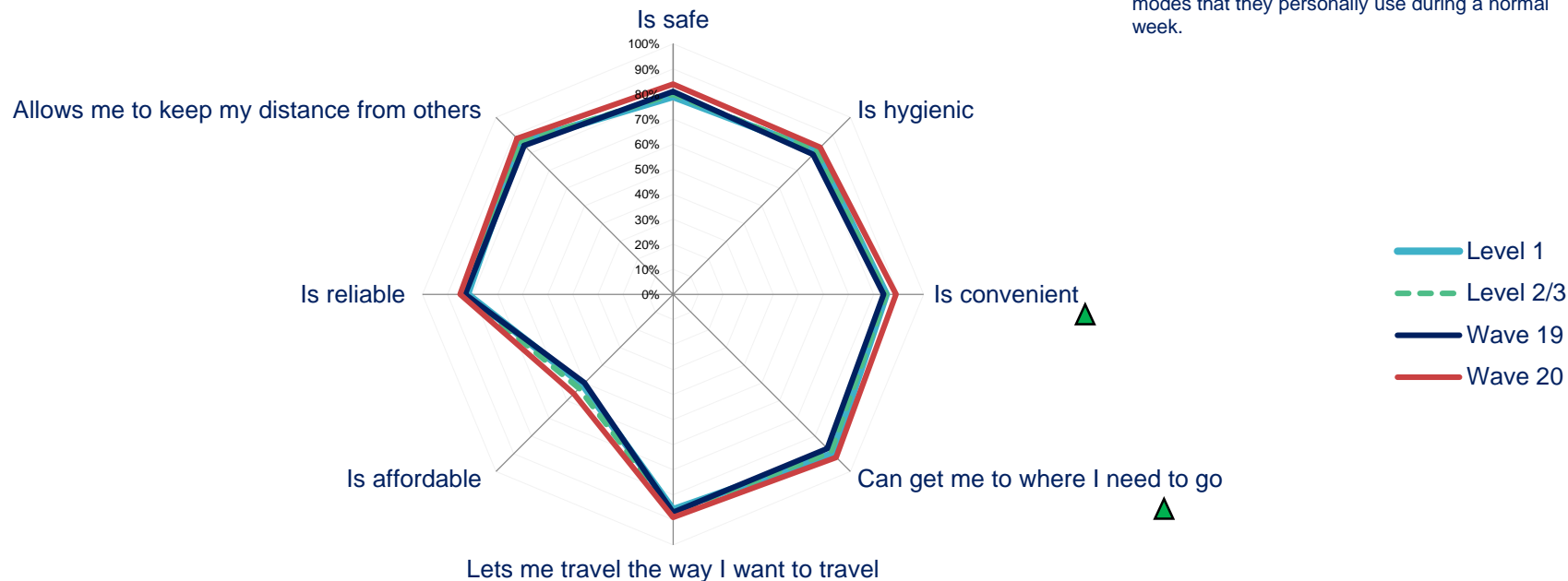
Base: New Zealanders who travel by train normally: level 1 (n=467), level 2/3 (n=117); wave 19 (n=60); wave 20 (n=54)



# Recent occurrences of new localised lockdowns appears to have improved private vehicles perceptions slightly, potentially at the expense of public transport modes

## Perceptions of private vehicles

**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 normally travel by private vehicle: level 1 (n=2,256), level 2/3 (n=721); wave 19 (n=366); wave 20 (n=395)



Indicates a statistically significant increase against wave 19



Indicates a statistically significant decrease against wave 19



# Section 7 – Working from home

# Key findings – working from home

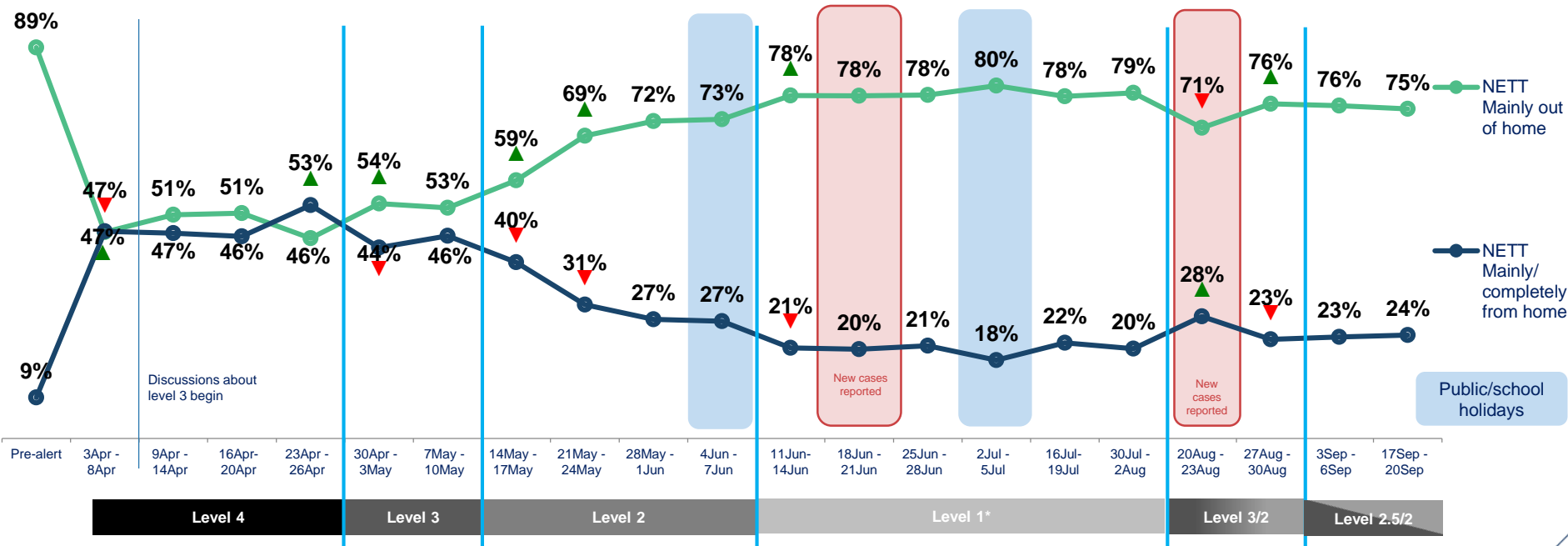
## Waka Kotahi objective – understanding behaviour change

- 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.
- The proportion working from home in Auckland under the second week of the level 2.5 lockdown has not shifted and is still short of where it was in level 1.
- It appears that the impact of the latest lockdown on working from home in Auckland will be largely short-lived, although there is still a short-way to go to close the gap to work habits seen prior in June and July.
- As noted last week, this has resulted in a stable national picture in terms of the proportion working from home, which is only a little higher than it was in level 1.
- Also as noted last week, public transport continues to be disproportionately impacted by lock-downs, with a greater share of this commuter type working from home. Although the proportion impacted is down in level 2.5/2 compared to level 3/2, one in three public transports users remain working from home compared to around one in four in the total working population.



# While it may not be back to pre-lockdown levels, the proportion working from home is still slightly short of “new normal” established during level 1

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



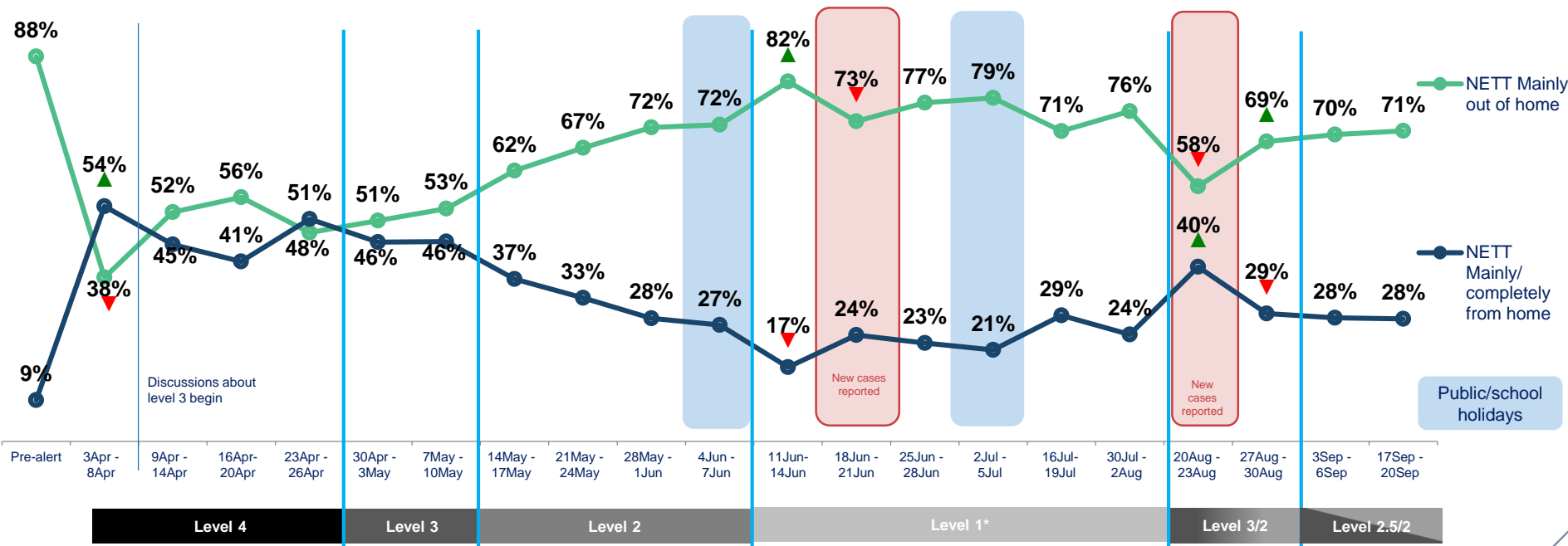
QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you currently work?

Base: all adults 15+ in New Zealand usually working



# The long-term impact of the latest lockdown on working from home in Auckland appears to be largely short-lived, as it edges closer to the 'new normal' of level 1

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



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

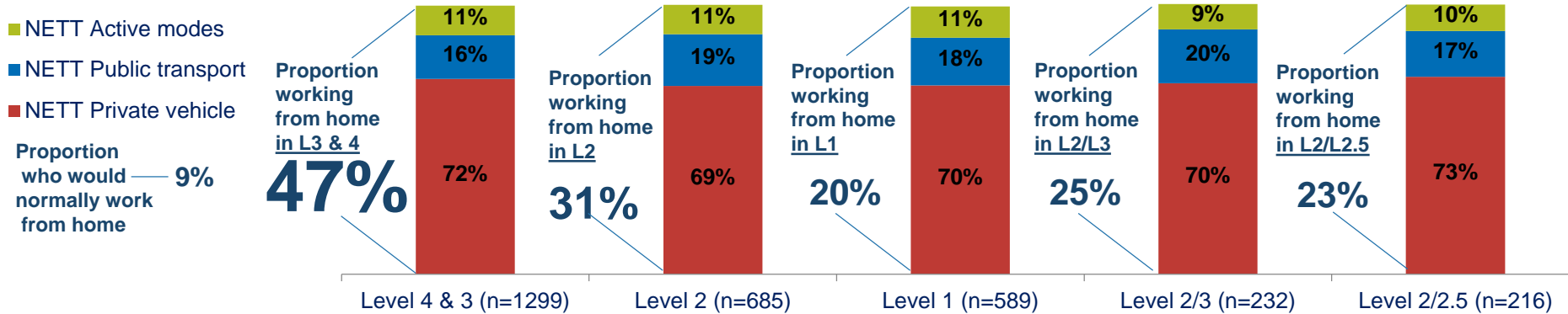
Base: all adults 15+ in Auckland who are usually working





# Public transport continues to be the mode most impacted by commuters working from home, with one in three public transport users removed from the morning commute

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



## Proportion of each commuter type working from home

Proportion WFH by level	47%	31%	20%	25%	23%
Within active mode commuters	53%	31% ▼	17% ▼	19%	17%
Within private vehicle commuters	43%	25% ▼	13% ▼	18% ▲	16%
Within public transport commuters	62%	42% ▼	24% ▼	38% ▲	33%

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 each of the modes mentioned





Section 8 – Access to commerce

# Key findings – access to commerce

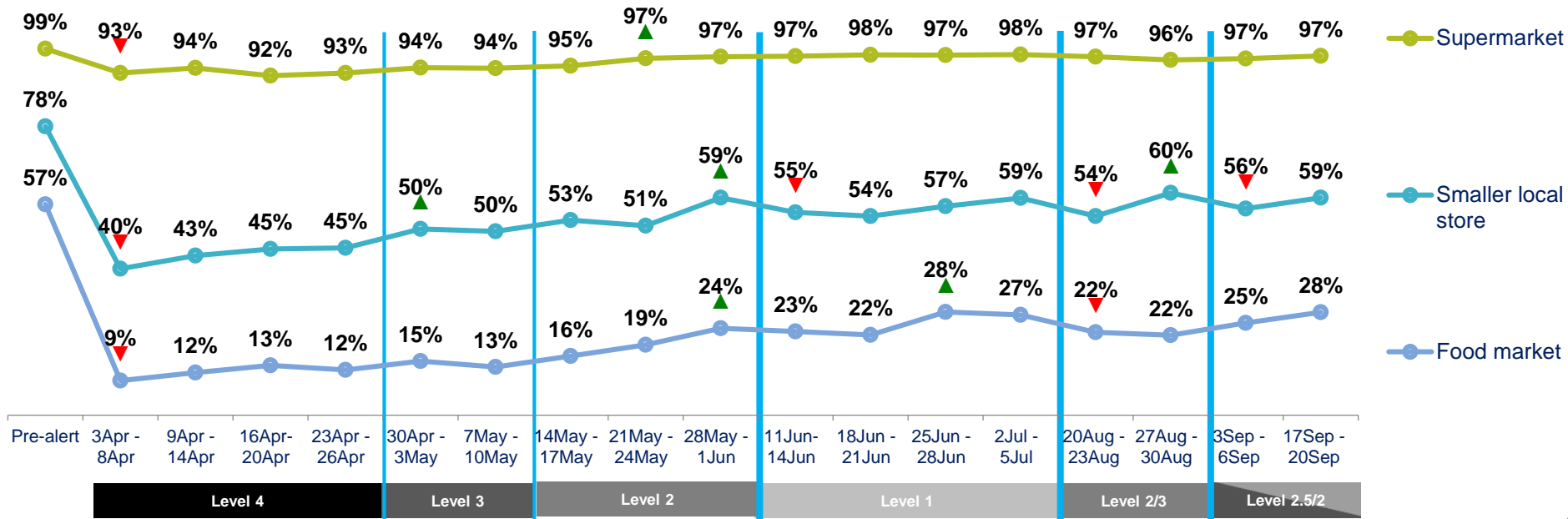
## Waka Kotahi objective – understanding behaviour change

- In order to understand the potential long term effects of changing travel behaviour we want to understand the ways in which New Zealanders are adapting to their circumstances and accessing the things they need and want.
- Nationally, the second week of the latest lockdown iteration hasn't shifted shopping channels greatly, although the use of food markets has matched rates seen in level 1.
- Online shopping however, remains slightly higher than it was during level 1.
- Within Auckland, online shopping for groceries and other items has begun to wane, as people begin to return to bricks and mortar shopping channels.
- Conversely, outside of Auckland almost all channels have directionally improved whether they be offline or online.



# Food markets are continuing a directional recovery in weekly usage across New Zealand

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



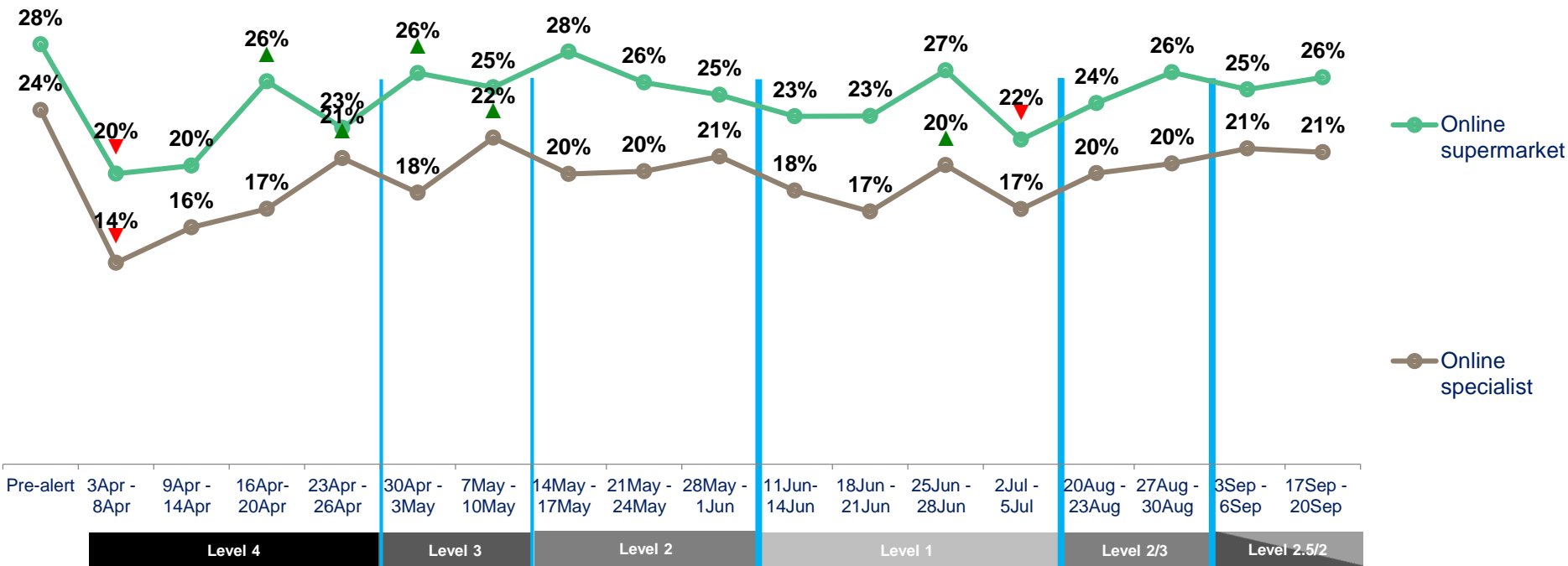
QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past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

Base: all adults who ever grocery shop in New Zealand (c. 1200 per wave)



# Nationally, online retailers continue to be used by more New Zealanders currently than they did during level one

## Normal week and most recent week shopping trips taken by survey wave – online

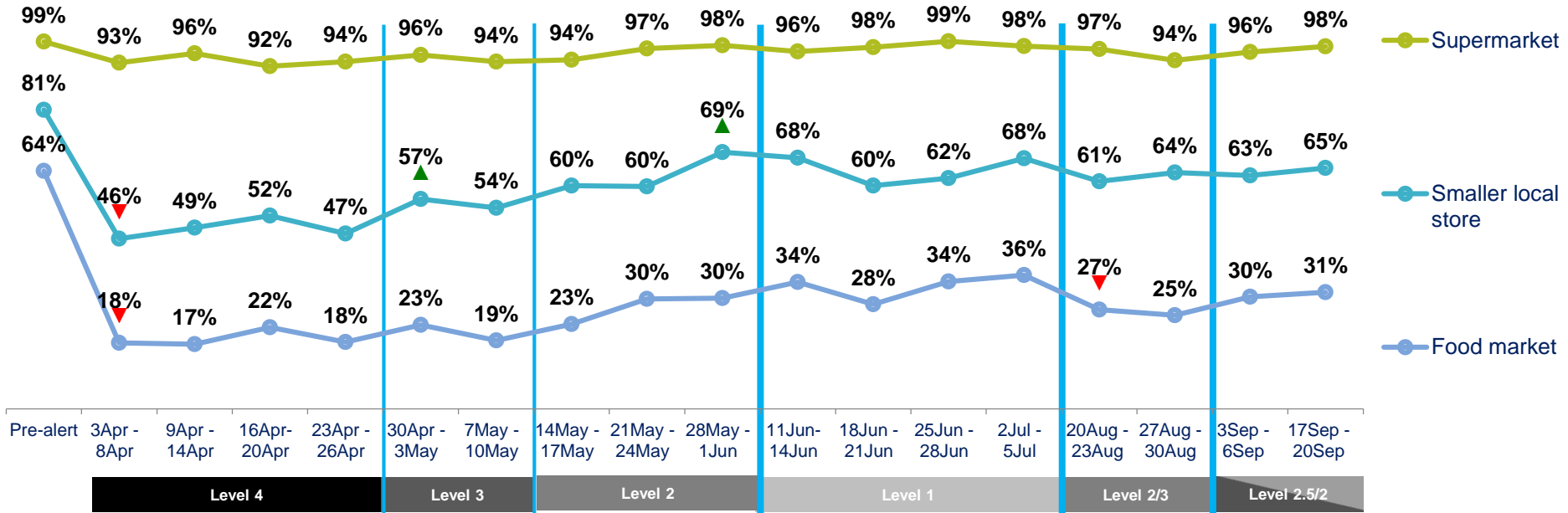


QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past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

Base: all adults who ever grocery shop in New Zealand (c. 1200 per wave)

# In Auckland physical store usage is mostly back to where it was before the new lockdown following directional growth over the past 2 waves

Normal week and most recent week shopping trips taken by survey wave – Auckland, physical



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

Base: all adults who ever grocery shop in Auckland (c.330 per wave)



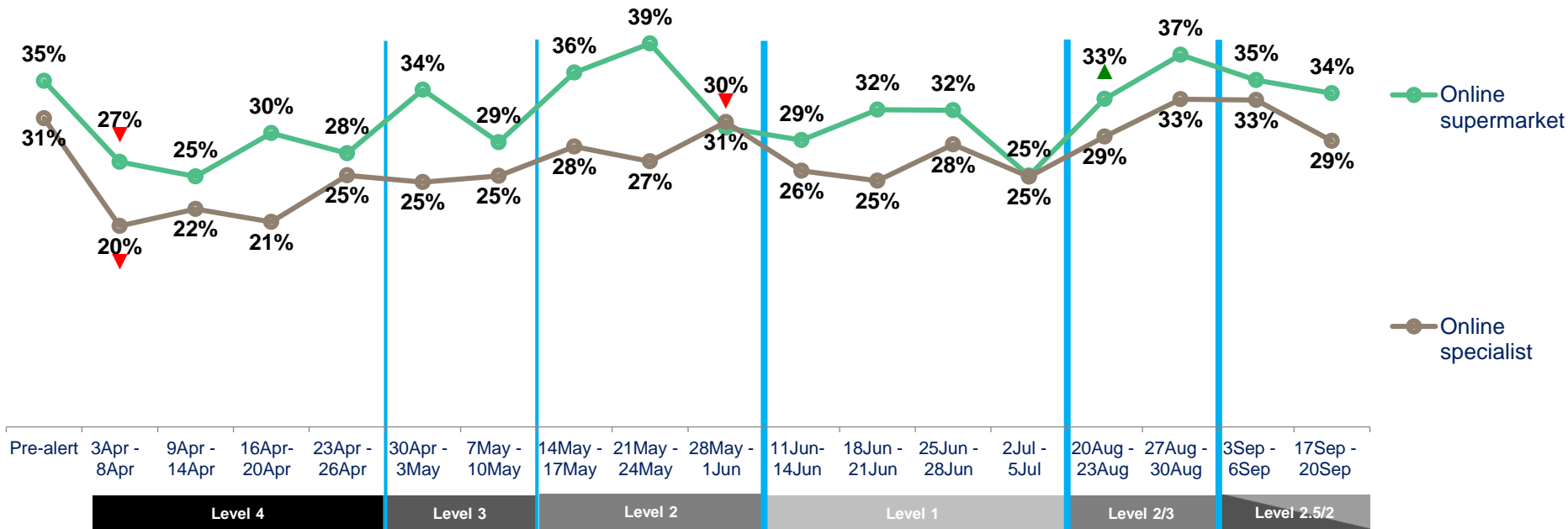
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# However, online shopping for groceries in Auckland is declining from the usage peak that occurred at the end of August

Normal week and most recent week shopping trips taken by survey wave – Auckland, online



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

Base: all adults who ever grocery shop in Auckland (c.330 per wave)



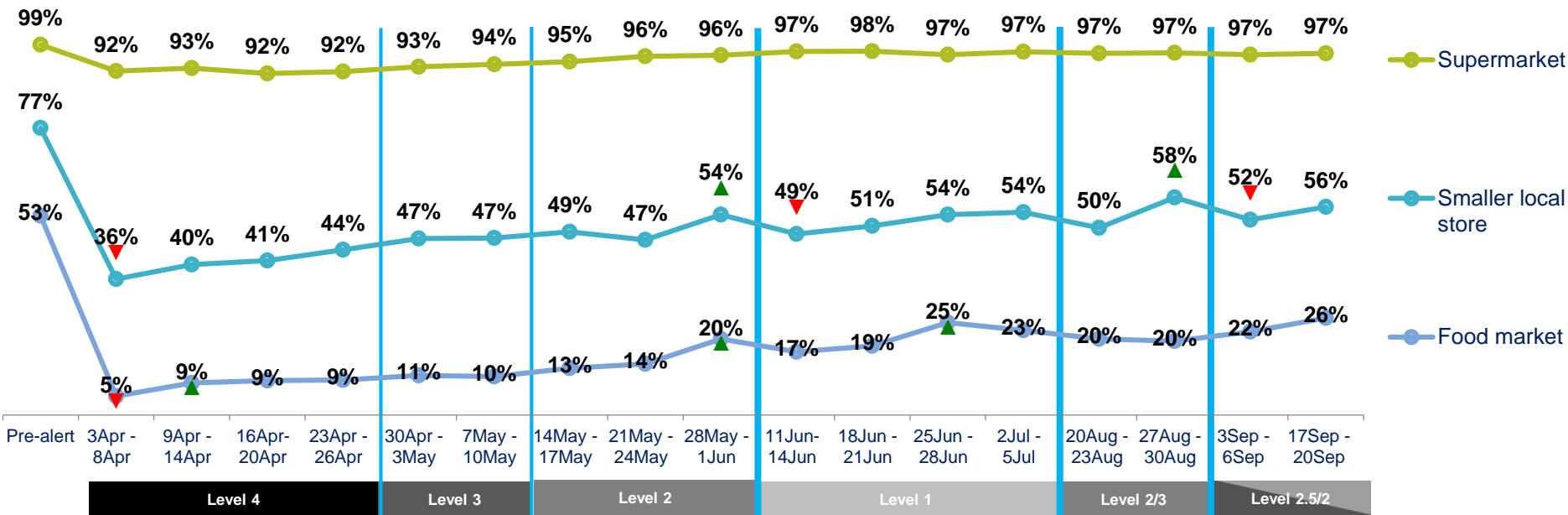
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Physical grocery stores large and small outside of Auckland have not been impacted by this second lockdown

Normal week and most recent week shopping trips taken by survey wave – out of Auckland, physical



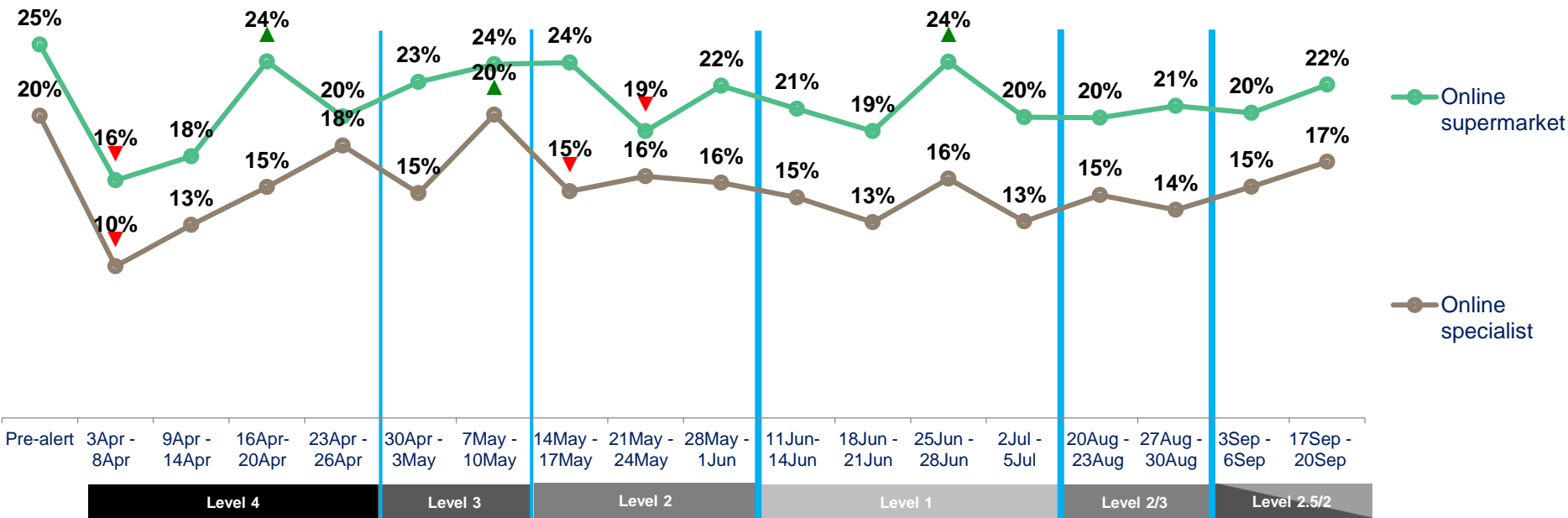
QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past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

Base: all adults who ever grocery shop outside of Auckland (c.930 per wave)



# However, there has been some directional growth in reported online specialist usage during the more recent weeks of the second lockdown

Normal week and most recent week shopping trips taken by survey wave – out of Auckland, online



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

Base: all adults who ever grocery shop outside of Auckland (c930 per wave)

