Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–21 core report

29 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: NZTAresearch@nzta.govt.nz.

Report content

COVID-19 transport impact

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Section 1 – About this research

Study purpose and importance

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

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

To understand **how travel is changing** and evolving in response to COVID-19 on a 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 & 19, 20 and 21 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-one 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, combined sum of wave 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 21 report is based on a statistically significant shift of results between waves 1 to 21, 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 vs level 2/1 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	
11	Thursday 11 June to Sunday 14 June	Alert level 1
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	
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 24th September to Sunday 27 September	Alert level 2 (AKL) Alert level 1 (Rest of NZ)

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.
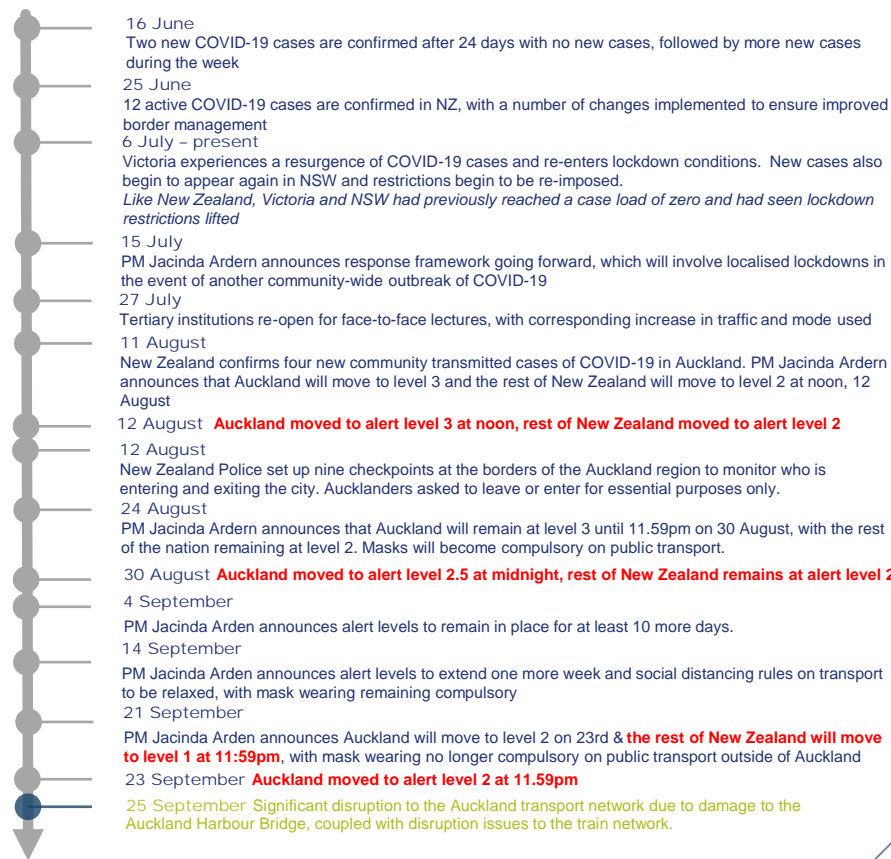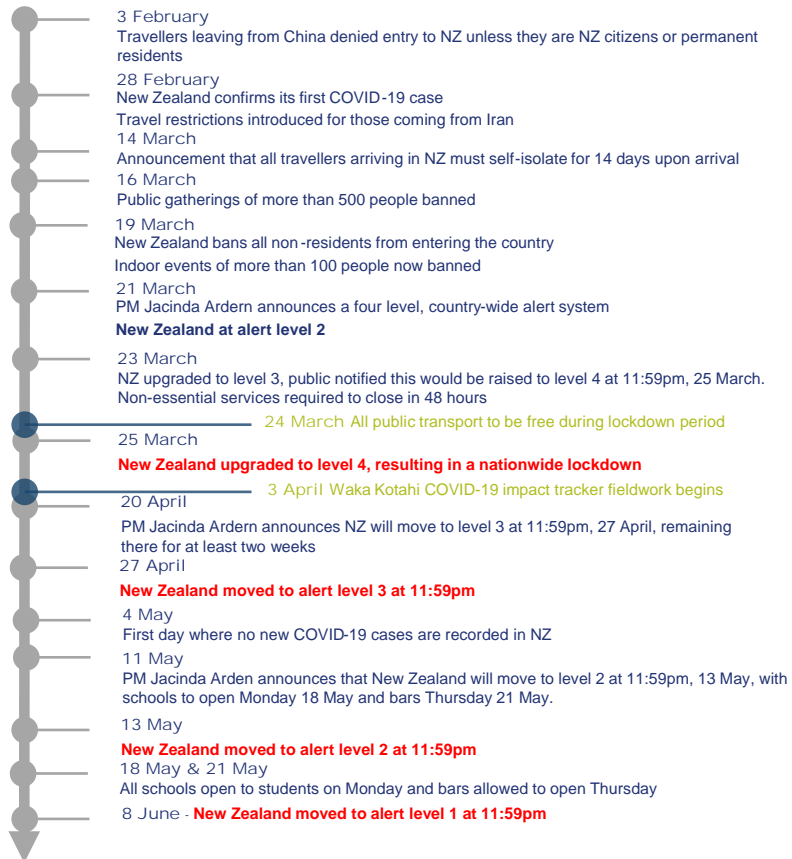
Sample structure and further definitions

Definition		Waves 1-4		Waves 5-6		Waves 7-10		Waves 11-16		Waves 17-18		Waves 19-20		Wave 21	
		Sample	MoE*	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	n=1,253	2.77
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	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=599	4.0	n=200	6.93	n=197	6.98	n=100	9.8
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0	n=200	6.93	n=217	6.65	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=1,129	2.92	n=311	5.56	n=357	5.19	n=175	7.41
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	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=607	3.98	n=200	6.93	n=208	6.79	n=87	10.51
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	n=360	5.16
Disability, Vulnerability and COVID-19**															
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	n=132	8.53
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	n=317	5.5
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	n=162	7.7

*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

3 February
Travellers leaving from China denied entry to NZ unless they are NZ citizens or permanent residents

28 February
New Zealand confirms its first COVID-19 case
Travel restrictions introduced for those coming from Iran

14 March
Announcement that all travellers arriving in NZ must self-isolate for 14 days upon arrival

16 March
Public gatherings of more than 500 people banned

19 March
New Zealand bans all non-residents from entering the country
Indoor events of more than 100 people now banned

21 March
PM Jacinda Ardern announces a four level, country-wide alert system
New Zealand at alert level 2

23 March
NZ upgraded to level 3, public notified this would be raised to level 4 at 11:59pm, 25 March. Non-essential services required to close in 48 hours

24 March All public transport to be free during lockdown period

25 March
New Zealand upgraded to level 4, resulting in a nationwide lockdown

3 April Waka Kotahi COVID-19 impact tracker fieldwork begins

20 April
PM Jacinda Ardern announces NZ will move to level 3 at 11:59pm, 27 April, remaining there for at least two weeks

27 April
New Zealand moved to alert level 3 at 11:59pm

4 May
First day where no new COVID-19 cases are recorded in NZ

11 May
PM Jacinda Arden announces that New Zealand will move to level 2 at 11:59pm, 13 May, with schools to open Monday 18 May and bars Thursday 21 May.

13 May
New Zealand moved to alert level 2 at 11:59pm

18 May & 21 May
All schools open to students on Monday and bars allowed to open Thursday

8 June - **New Zealand moved to alert level 1 at 11:59pm**

16 June
Two new COVID-19 cases are confirmed after 24 days with no new cases, followed by more new cases during the week

25 June
12 active COVID-19 cases are confirmed in NZ, with a number of changes implemented to ensure improved border management

6 July – present
Victoria experiences a resurgence of COVID-19 cases and re-enters lockdown conditions. New cases also begin to appear again in NSW and restrictions begin to be re-imposed.
Like New Zealand, Victoria and NSW had previously reached a case load of zero and had seen lockdown restrictions lifted

15 July
PM Jacinda Ardern announces response framework going forward, which will involve localised lockdowns in the event of another community-wide outbreak of COVID-19

27 July
Tertiary institutions re-open for face-to-face lectures, with corresponding increase in traffic and mode used

11 August
New Zealand confirms four new community transmitted cases of COVID-19 in Auckland. PM Jacinda Ardern announces that Auckland will move to level 3 and the rest of New Zealand will move to level 2 at noon, 12 August

12 August **Auckland moved to alert level 3 at noon, rest of New Zealand moved to alert level 2**

12 August
New Zealand Police set up nine checkpoints at the borders of the Auckland region to monitor who is entering and exiting the city. Aucklanders asked to leave or enter for essential purposes only.

24 August
PM Jacinda Ardern announces that Auckland will remain at level 3 until 11.59pm on 30 August, with the rest of the nation remaining at level 2. Masks will become compulsory on public transport.

30 August **Auckland moved to alert level 2.5 at midnight, rest of New Zealand remains at alert level 2**

4 September
PM Jacinda Arden announces alert levels to remain in place for at least 10 more days.

14 September
PM Jacinda Arden announces alert levels to extend one more week and social distancing rules on transport to be relaxed, with mask wearing remaining compulsory

21 September
PM Jacinda Arden announces Auckland will move to level 2 on 23rd & **the rest of New Zealand will move to level 1 at 11:59pm**, with mask wearing no longer compulsory on public transport outside of Auckland

23 September **Auckland moved to alert level 2 at 11.59pm**

25 September Significant disruption to the Auckland transport network due to damage to the Auckland Harbour Bridge, coupled with disruption issues to the train network.

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Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–21

Waka Kotahi COVID-19 transport impact tracker

- Wave 21 of fieldwork is the fifth wave under a split level condition, with Auckland under a level 2 lockdown for a second week and the rest of New Zealand under level 1. It should be noted that the change in Auckland's level only occurred the day before interviewing in this wave began so responses should be considered as being partially reflective of life under the preceding level 2.5/2 conditions.

- COVID-19 infection and transmission concerns have not been materially impacted by the change in levels, remaining stable both inside and outside of Auckland.
  - Despite this, self-isolating habits have continued a trajectory of change across New Zealand, with Aucklanders significantly less likely to be completely self-isolating and non-Aucklanders more likely to be travelling around as they normally would.

- Now that masks are no longer compulsory on public transport outside of Auckland, commitment to mask wearing has softened slightly although there hasn't been a significant increase in those who say they won't wear one, suggesting a degree of conditionality with adherence.
  - However, data about mask wearing under other circumstances suggests that Auckland may not follow the same pattern as the rest of the country once masks are no longer required. For example, adherence to mask wearing has been consistently higher for activities like grocery shopping and has not fallen away with the change in levels as it has outside of Auckland.

- With most journey types already having returned to close to normal rates for those outside of Auckland, what growth and recovery has been recorded this week has been driven by increases in Auckland.
  - Notably, this includes an increase in work trips as well as weekly grocery shopping and other non-essential journeys. All of this has been occurring in spite of logistical disruptions across the network and could mean that the stepping down of COVID-19 restrictions is more influential than these physical transportation issues.

- Reported mode usage did not change significantly along with the shift in alert levels, although it is notable that for respondents, the preceding week they were asked to report about their travelling habits straddled the two lockdown periods and therefore includes some level 2/2.5 behaviour.
  - Some public transport modes continued to see a directional decline both nationally and within Auckland, with only ferry usage remaining stable in the city.
  - Few Aucklanders cited the Harbour Bridge as a reason for decreased public transport usage this week, while out of Auckland, one in 10 said they had decreased their public transport usage out of concern that others would no longer wear masks.

- Working from home continues to be stable nationally, but remains two to four points higher than that seen during level 1 and continues to disproportionately impact the public transport.
  - Auckland saw a small, but not statistically significant increase in working from home this wave, in spite of the many disruptions occurring. Of these disruptions, COVID-19 restrictions still have a proportionately greater impact on working from home.

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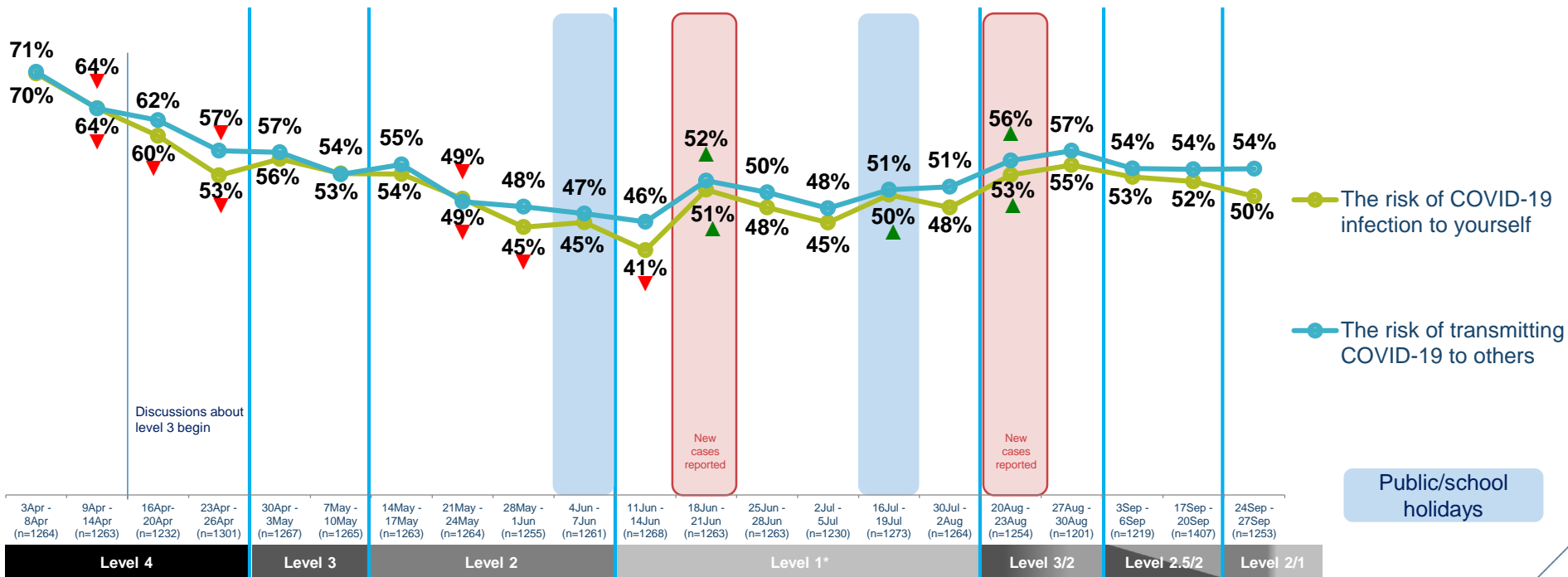Section 3 – Context: concern

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 first week of a return to a level 2 lockdown in Auckland, and a return to level 1 elsewhere in New Zealand, following a split level lockdown in response to community transmissions in Auckland.

- Concerns about economic factors have remained stable for some time and appear less sensitive to changes in alert levels.

- Concerns about COVID-19 infection and transmission risks have stabilised both inside and outside of Auckland, although concerns within Auckland remain notably higher than they were during level 1 fieldwork.

- Self-isolation continues to decrease with the change in alert levels, with less extreme self-isolating within Auckland and an increase in those out of Auckland who claim their travel routines are as normal.

- The change in alert levels has had a minor impact on the confidence of Aucklanders when it comes to knowing what travel restrictions are in place, this is common at the changing of alert levels and often resets in the weeks following.
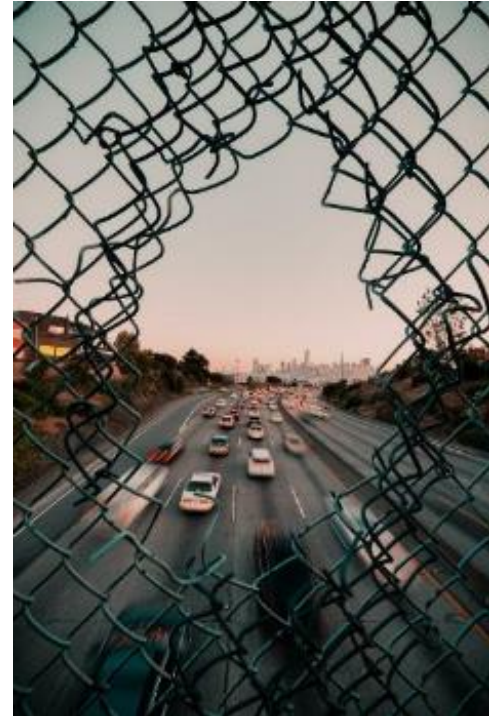
Nationally, concerns about COVID-19 transmission remain stable, but at a higher level than seen during level 1

COVID-19 concerns (NETT all concerned)

The risk of COVID-19 infection to yourself

The risk of transmitting COVID-19 to others

Discussions about level 3 begin

New cases reported

New cases reported

Public/school holidays

Date	Level
3Apr - 8Apr (n=1264)	Level 4
9Apr - 14Apr (n=1263)	
16Apr - 20Apr (n=1232)	
23Apr - 26Apr (n=1301)	
30Apr - 3May (n=1267)	Level 3
7May - 10May (n=1265)	
14May - 17May (n=1263)	Level 2
21May - 24May (n=1264)	
28May - 1Jun (n=1255)	
4Jun - 7Jun (n=1261)	
11Jun - 14Jun (n=1268)	Level 1*
18Jun - 21Jun (n=1263)	
25Jun - 28Jun (n=1263)	
2Jul - 5Jul (n=1230)	
16Jul - 19Jul (n=1273)	
30Jul - 2Aug (n=1264)	
20Aug - 23Aug (n=1254)	Level 3/2
27Aug - 30Aug (n=1201)	
3Sep - 6Sep (n=1219)	Level 2.5/2
17Sep - 20Sep (n=1407)	
24Sep - 27Sep (n=1253)	Level 2/1

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

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Infection and transmission concerns in Auckland continue to sit higher than they do nationally, but the change in levels has not affected them tangibly

COVID-19 concerns (NETT all concerned) – Auckland
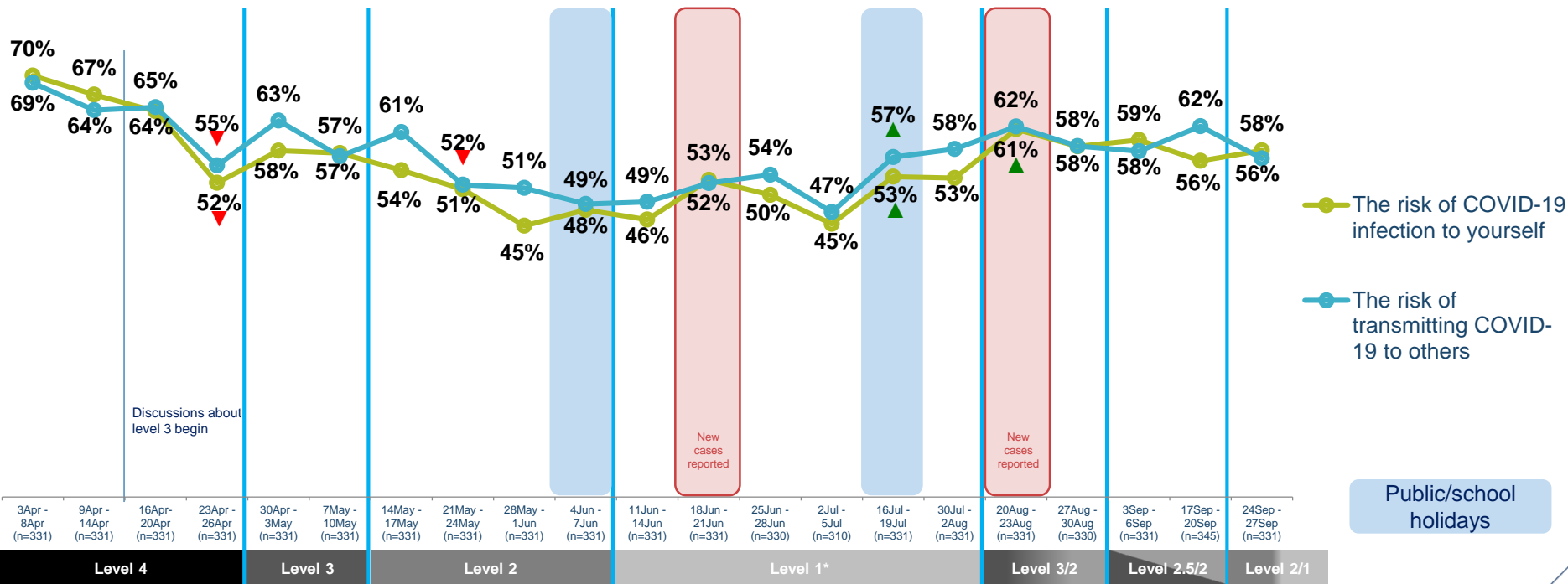
QPTUSE3. How personally concerned are you about each of the following?
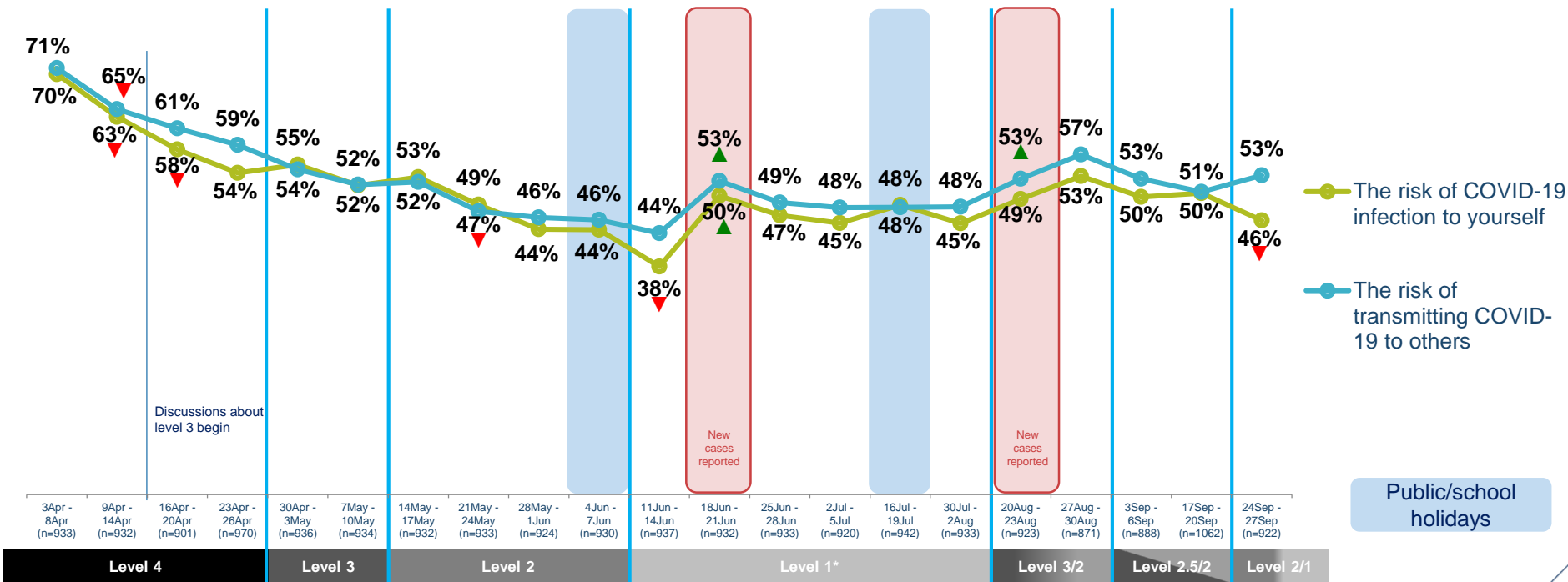*Base: all adults 15+ in Auckland *fieldwork frequency decreased from weekly during level 1*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Outside of Auckland, concerns about being personally infected dropped significantly for the first time since level 1, but transmission concerns remain unchanged
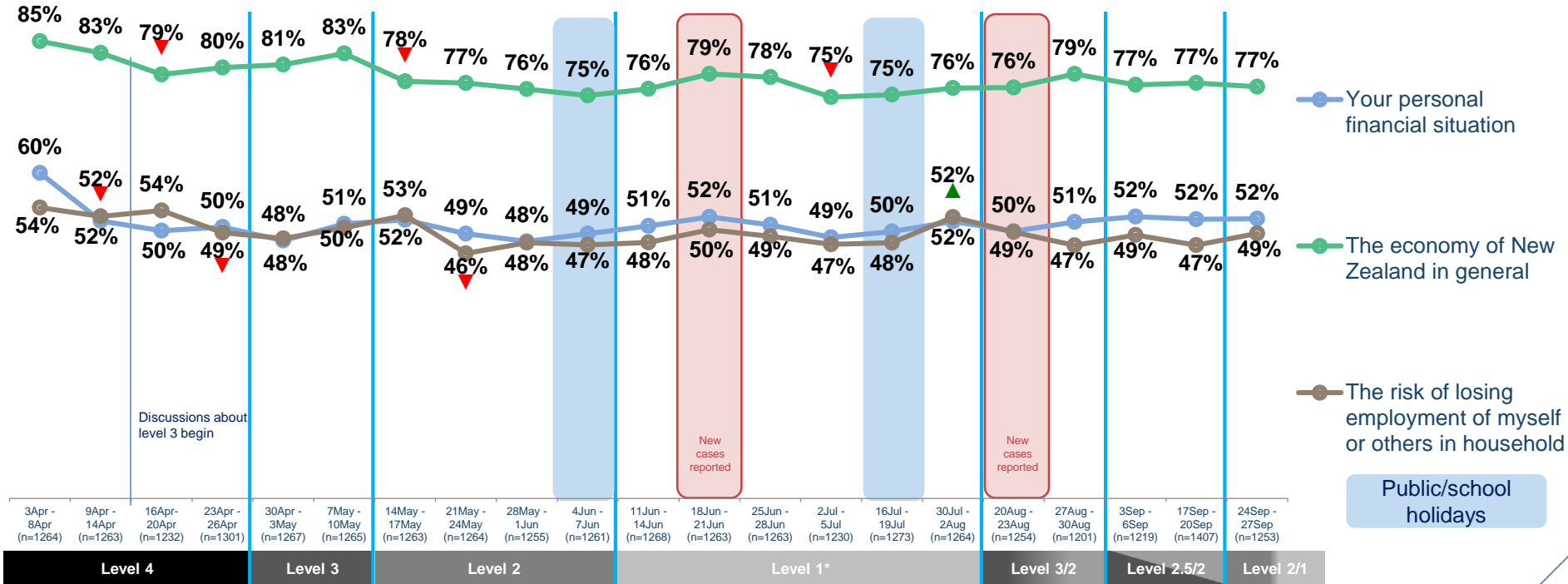
COVID-19 concerns (NETT all concerned) – out of Auckland

The risk of COVID-19 infection to yourself

The risk of transmitting COVID-19 to others

Public/school holidays

Discussions about level 3 begin

New cases reported

New cases reported

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*

3Apr - 8Apr (n=933)	9Apr - 14Apr (n=932)	16Apr - 20Apr (n=901)	23Apr - 26Apr (n=970)

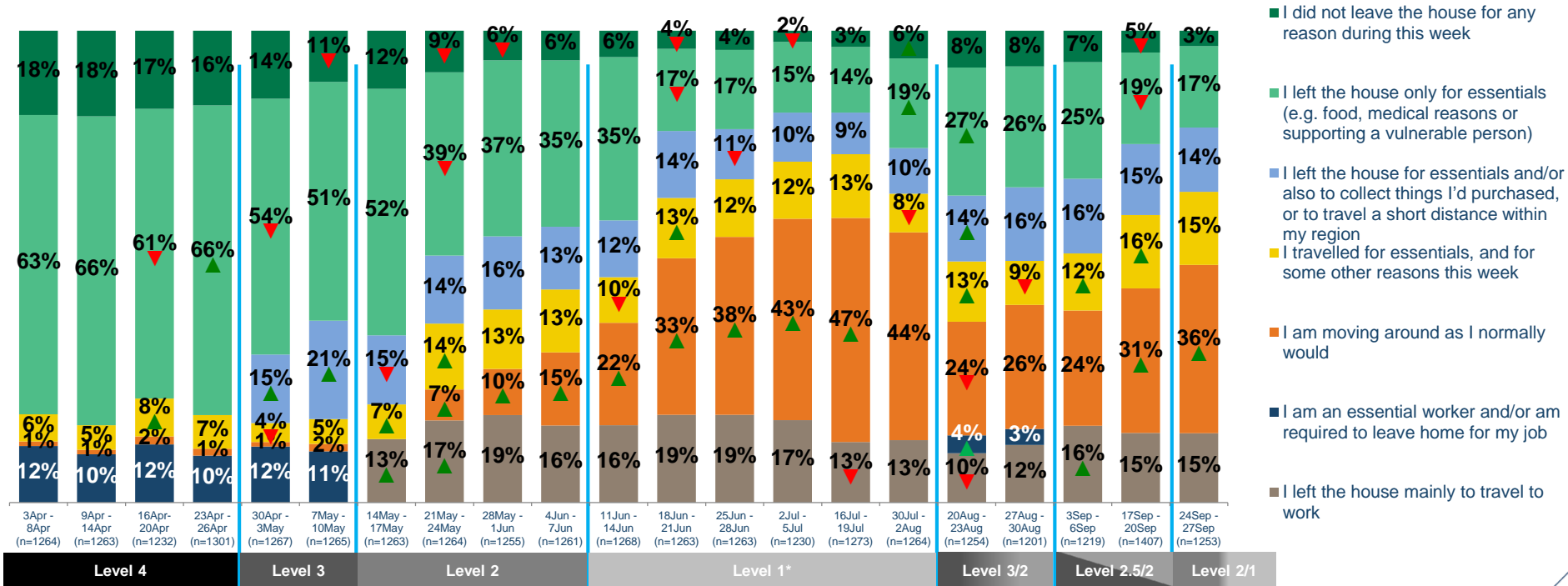Level 4 — Level 3 — Level 2 — Level 1* — Level 3/2 — Level 2.5/2 — Level 2/1

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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Economic concerns have also remained stable since level 1

Economic concerns (NETT all concerned)

Your personal financial situation (blue line):
52%, 50%, 54%, 49%, 48%, 51%, 53%, 46%, 48%, 49%, 51%, 52%, 51%, 49%, 50%, 52%, 50%, 51%, 52%, 52%, 52%

The economy of New Zealand in general (green line):
85%, 83%, 79%, 80%, 81%, 83%, 78%, 77%, 76%, 75%, 76%, 79%, 78%, 75%, 75%, 76%, 76%, 79%, 77%, 77%, 77%

The risk of losing employment of myself or others in household (brown line):
54%, 52%, 50%, 49%, 48%, 50%, 52%, 46%, 48%, 47%, 48%, 50%, 49%, 47%, 48%, 52%, 49%, 47%, 49%, 47%, 49%

60% (initial blue point)

Discussions about level 3 begin

New cases reported

New cases reported

Public/school holidays

Time period	n
3Apr - 8Apr	(n=1264)
9Apr - 14Apr	(n=1263)
16Apr - 20Apr	(n=1232)
23Apr - 26Apr	(n=1301)
30Apr - 3May	(n=1267)
7May - 10May	(n=1265)
14May - 17May	(n=1263)
21May - 24May	(n=1264)
28May - 1Jun	(n=1255)
4Jun - 7Jun	(n=1261)
11Jun - 14Jun	(n=1268)
18Jun - 21Jun	(n=1263)
25Jun - 28Jun	(n=1263)
2Jul - 5Jul	(n=1230)
16Jul - 19Jul	(n=1273)
30Jul - 2Aug	(n=1264)
20Aug - 23Aug	(n=1254)
27Aug - 30Aug	(n=1201)
3Sep - 6Sep	(n=1219)
17Sep - 20Sep	(n=1407)
24Sep - 27Sep	(n=1253)

Level 4 | **Level 3** | **Level 2** | **Level 1*** | **Level 3/2** | **Level 2.5/2** | **Level 2/1**

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*

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△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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There has been statistically significant growth in the proportion that report normal travel behaviour, and self isolation rates are now much closer to level 1

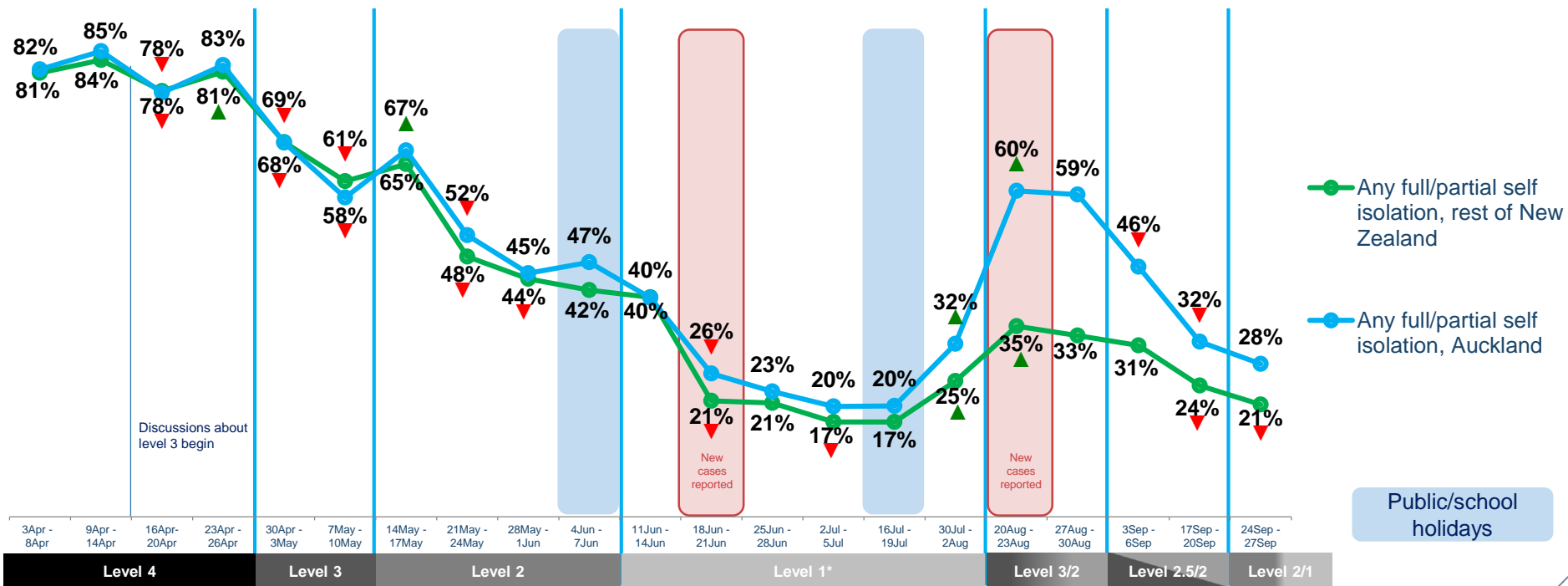*Reported activity and movement during the past seven days by wave, excludes exercise*

Legend:
- I did not leave the house for any reason during this week
- I left the house only for essentials (e.g. food, medical reasons or supporting a vulnerable person)
- I left the house for essentials and/or also to collect things I'd purchased, or to travel a short distance within my region
- I travelled for essentials, and for some other reasons this week
- I am moving around as I normally would
- I am an essential worker and/or am required to leave home for my job
- I left the house mainly to travel to work

ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
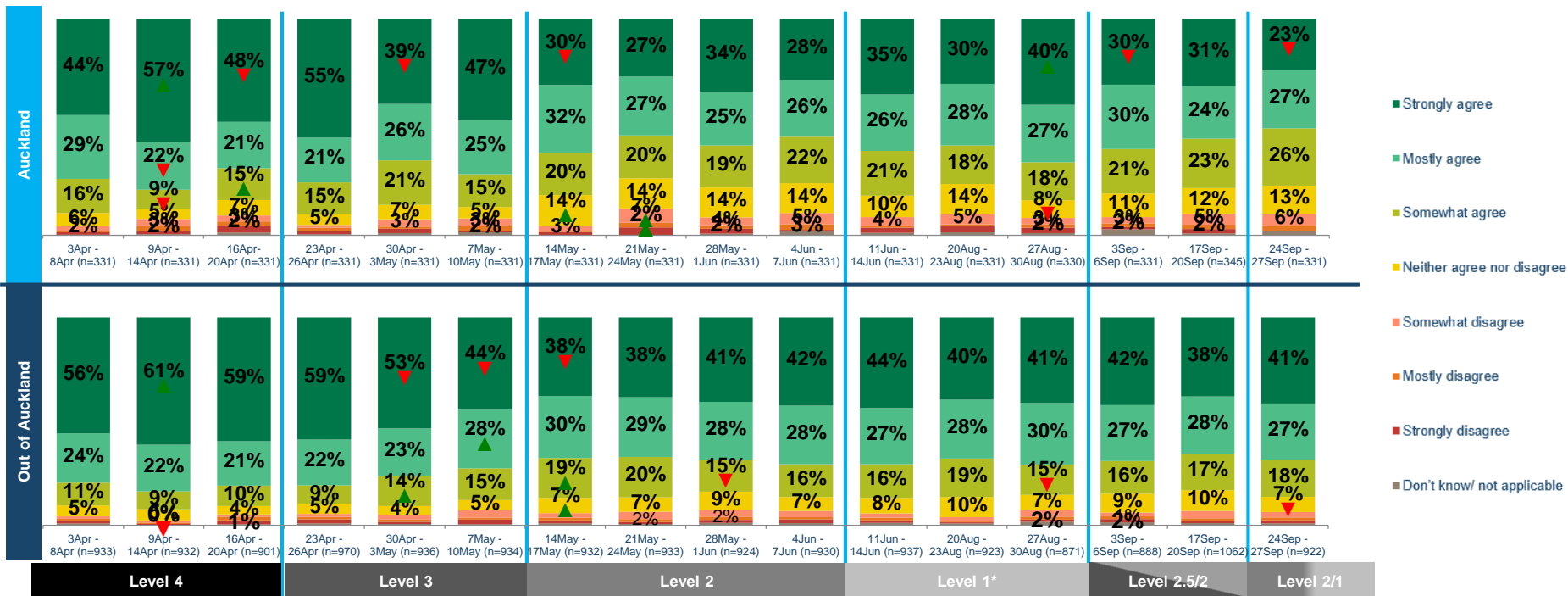*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Auckland saw a statistically significant fall in those completely self isolating, but the decrease in this behaviour is slowing when partial isolation is accounted for

Reported activity and movement during the past seven days by wave, excludes exercise
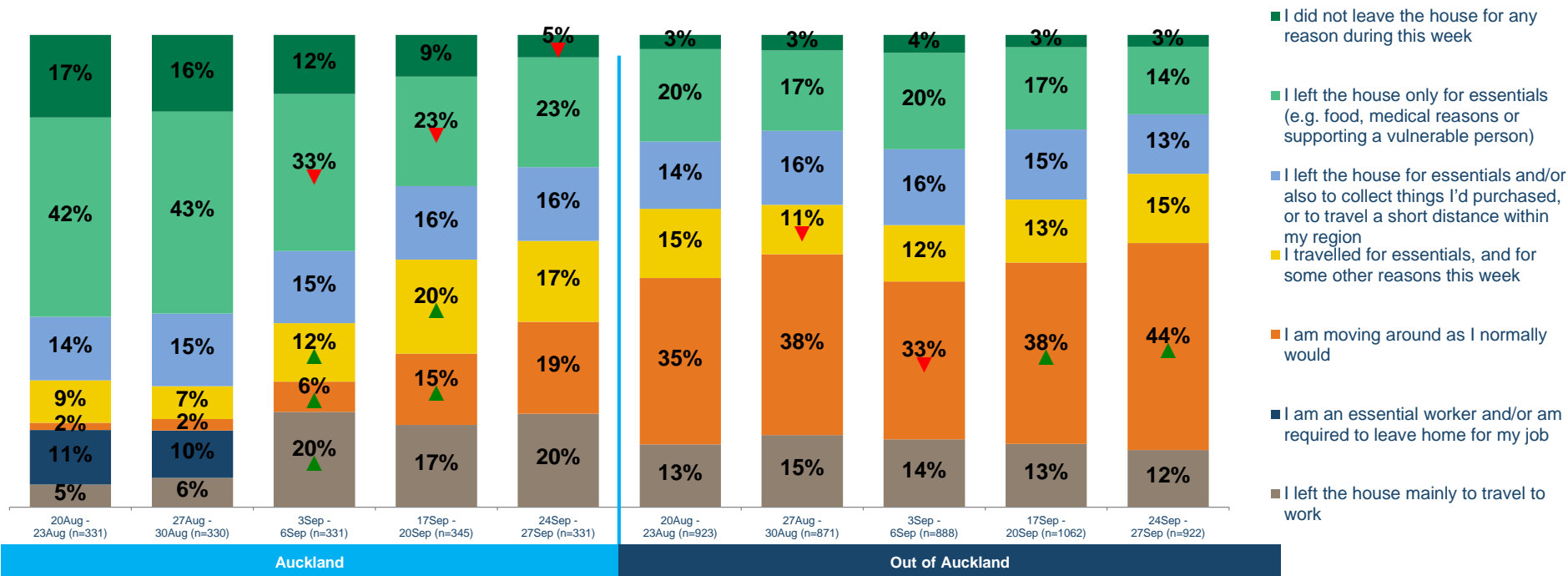
ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

Self-isolating behaviours in Auckland have been returning to something more closely aligned with the rest of the country

Self isolation over time

Legend:
- Any full/partial self isolation, rest of New Zealand (green)
- Any full/partial self isolation, Auckland (blue)

Data points (rest of NZ / Auckland):
- 3Apr-8Apr: 81% / 82%
- 9Apr-14Apr: 84% / 85%
- 16Apr-20Apr: 78% / 78%
- 23Apr-26Apr: 81% / 83%
- 30Apr-3May: 68% / 69%
- 7May-10May: 65% / 58%
- 14May-17May: 65% / 67%
- 21May-24May: 48% / 52%
- 28May-1Jun: 44% / 45%
- 4Jun-7Jun: 42% / 47%
- 11Jun-14Jun: 40% / 40%
- 18Jun-21Jun: 21% / 26%
- 25Jun-28Jun: 21% / 23%
- 2Jul-5Jul: 17% / 20%
- 16Jul-19Jul: 17% / 20%
- 30Jul-2Aug: 25% / 32%
- 20Aug-23Aug: 35% / 60%
- 27Aug-30Aug: 33% / 59%
- 3Sep-6Sep: 31% / 46%
- 17Sep-20Sep: 24% / 32%
- 24Sep-27Sep: 21% / 28%

Annotations:
- Discussions about level 3 begin
- New cases reported (18Jun-21Jun)
- New cases reported (20Aug-23Aug)
- Public/school holidays

Alert levels:
- Level 4
- Level 3
- Level 2
- Level 1*
- Level 3/2
- Level 2.5/2
- Level 2/1

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*

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▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

New Zealand Government

As has often been the case in the past, the change in alert level has somewhat reduced the level of confidence that Aucklanders have in knowing the restrictions

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*

Legend:
- Strongly agree
- Mostly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Mostly disagree
- Strongly disagree
- Don't know/ not applicable

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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New Zealand Government

Section 4 – Context: mask adherence

Key findings – context

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

- In light of the change of alert levels, mask wearing on public transport is only compulsory within Auckland this week. It's important to understand whether this behaviour is likely to become entrenched long-term on public transport services given that, for some network users, masks offer greater reassurance about protection from transmission.

- Outside of Auckland, adherence to mask wearing is significantly less committed than it was at the start of September before masks became compulsory on public transport nationwide.

- It is notable that this shift is more towards **conditionality** than outright rejection of mask wearing, with no statistically significant increase in the proportion who say they would never wear a mask.

- As commitment has decreased on public transport, mask wearing has declined in other areas of life, with significant increases in those saying they would not wear a mask during active mode travel or when grocery shopping (eg in a supermarket).

- However, at a nationwide level, commitment was never quite as high in these spaces as it has been on public transport and during the preceding four weeks of lockdown never saw any significant growth.

- Commitment to mask wearing was always higher in Auckland during the mixed-level lockdown. For example, for grocery shopping has always had a 70-75% level of commitment within Auckland compared to 14-26% outside of Auckland. This commitment to mask wearing while shopping did not decrease in Auckland when the alert levels were relaxed.
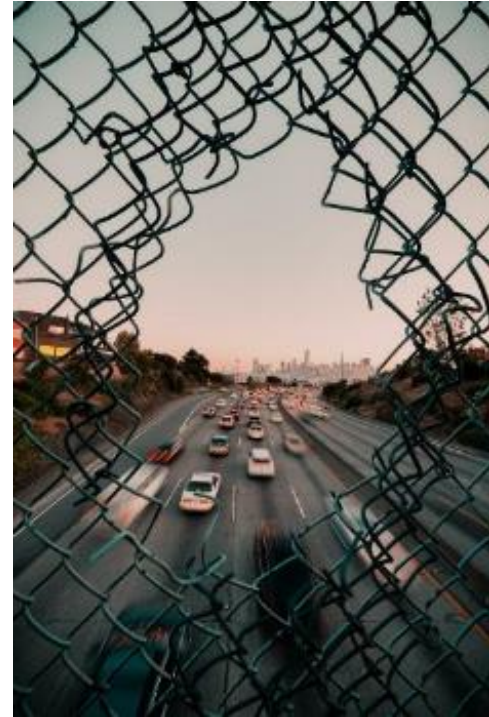
With masks no longer compulsory outside of Auckland, there has been a decrease in the proportion committed to usually wearing them on public transport

Mask usage when travelling on public transport (eg bus, train or ferry) – out of Auckland

NB: Once mask wearing became compulsory on public transport, measurement of adherence was suspended
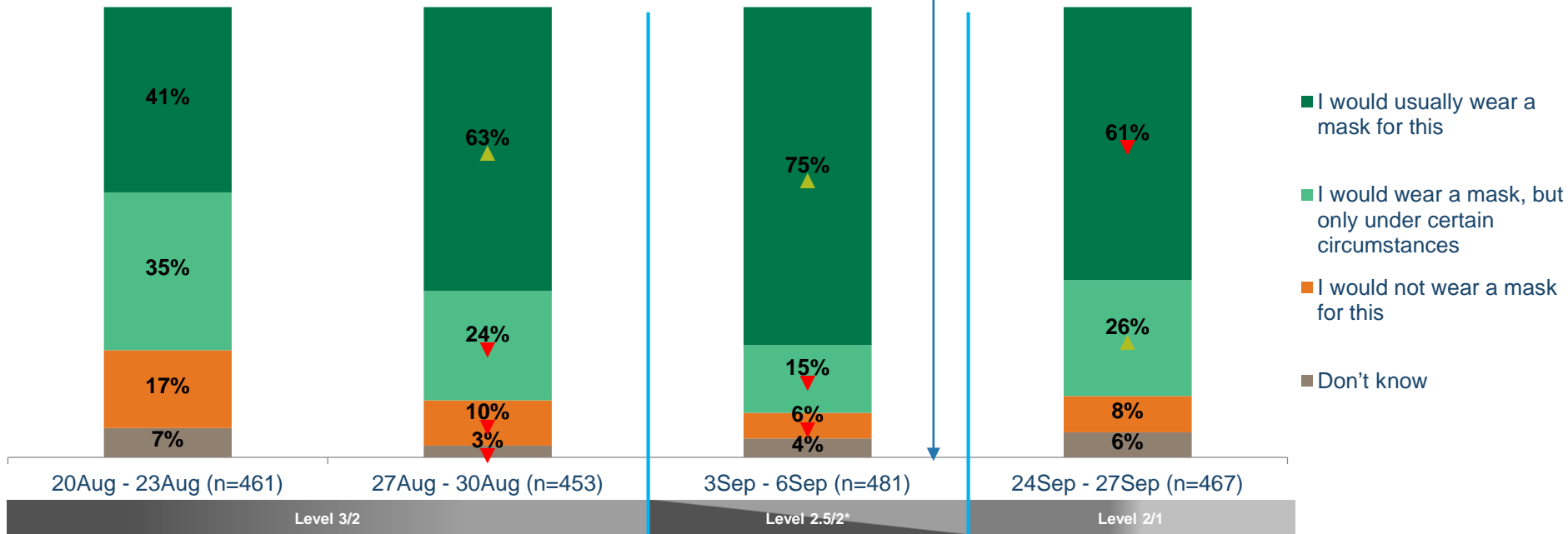

Legend:
- ■ I would usually wear a mask for this
- ■ I would wear a mask, but only under certain circumstances
- ■ I would not wear a mask for this
- ■ Don't know

Chart data:

	20Aug - 23Aug (n=461)	27Aug - 30Aug (n=453)	3Sep - 6Sep (n=481)	24Sep - 27Sep (n=467)
I would usually wear a mask	41%	63%	75%	61%
I would wear a mask, certain circumstances	35%	24%	15%	26%
I would not wear a mask	17%	10%	6%	8%
Don't know	7%	3%	4%	6%

Alert levels: Level 3/2 | Level 2.5/2* | Level 2/1

QMASK2A. Under the current alert level in your area, when doing the following activities which statement applies to you… When travelling on public transport (eg bus, train or ferry)
Base: all adults 15+ not in Auckland who might normally use public transport
*note: statement not asked during period in which mask wearing was compulsory

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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As lockdown restrictions are relaxed nationwide, there is also less of a commitment to wearing masks during active mode travel in busy areas

When walking or cycling in busy areas

	20Aug - 23Aug (n=945)	27Aug - 30Aug (n=926)	3Sep - 6Sep (n=963)	17Sep - 20Sep (n=1139)	24Sep - 27Sep (n=959)
I would usually wear a mask for this	21%	23%	26%	20% ▼	18%
I would wear a mask, but only under certain circumstances	32%	31%	30%	33%	29% ▼
I would not wear a mask for this	42%	43%	40%	44%	49% ▲
Don't know	5%	3% ▼	4%	4%	5%

Level 3/2 — Level 2.5/2 — Level 2/1

QMASK2A. Under the current alert level in your area, when doing the following activities which statement applies to you... When walking or cycling in busy areas
Base: all adults 15+ in New Zealand who would normally do this activity

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▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

New Zealand Government

Shopping has followed suit, with almost two in five saying they would not wear a mask for grocery shopping

When shopping for groceries (eg in a supermarket)
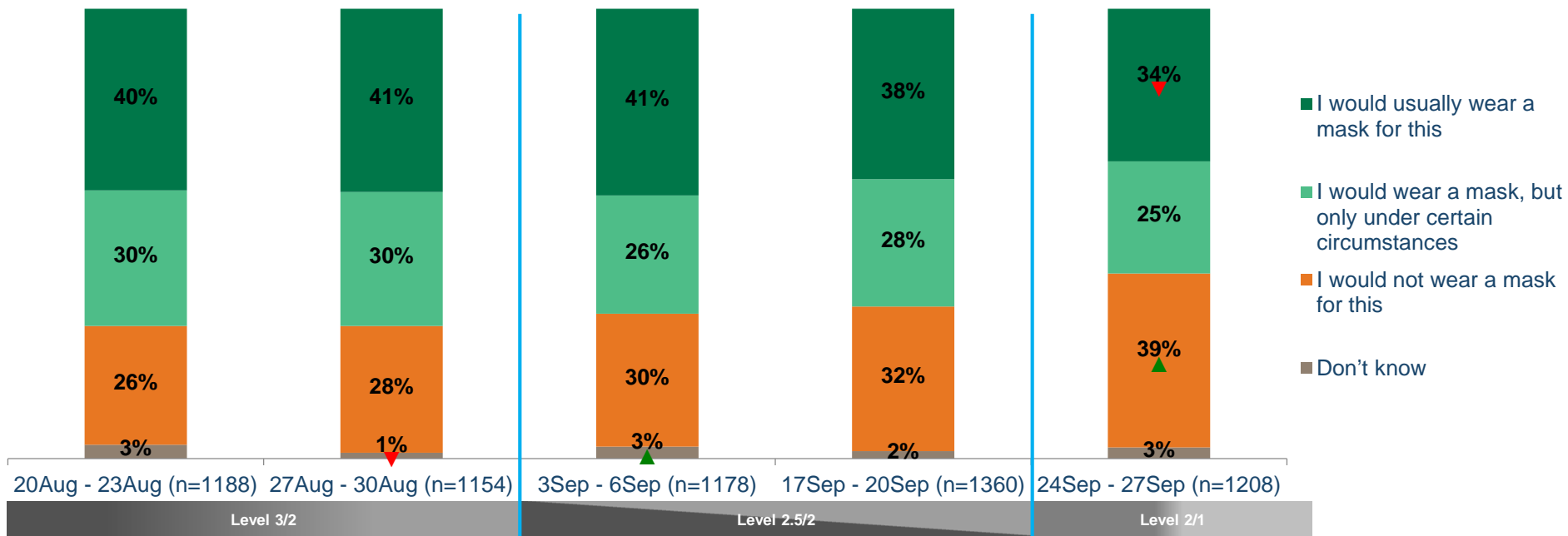
QMASK2A. Under the current alert level in your area, when doing the following activities which statement applies to you... When shopping for groceries (eg in a supermarket)
*Base: all adults 15+ in New Zealand who would normally do this activity*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

In Auckland, where alert levels have been higher, commitment to masks for shopping has also been higher and has not fallen away with the relaxation of alert levels

When shopping for groceries (eg in a supermarket)
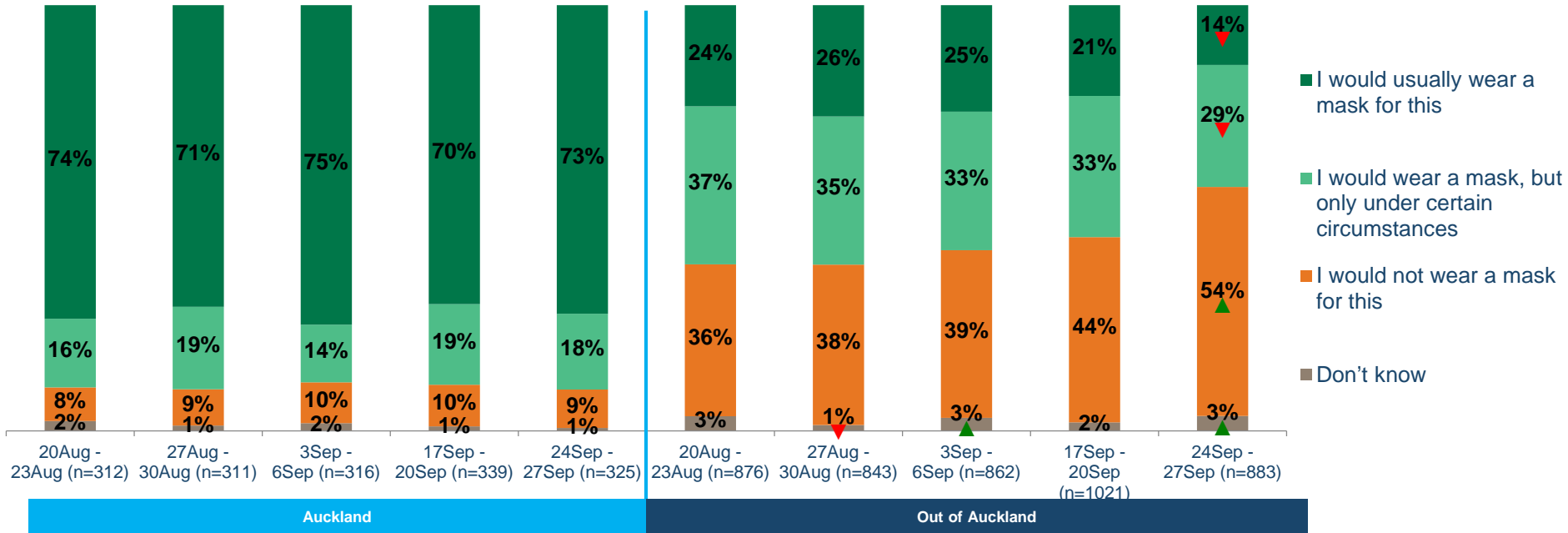
QMASK2A. Under the current alert level in your area, when doing the following activities which statement applies to you… When shopping for groceries (eg in a supermarket)
Base: all adults 15+ in New Zealand who would normally do this activity

Section 5 – 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.

- Work journeys have continued to steadily recover at a national level, but are still 10 points short of where they would have been in February. Growth in other daily essential journeys (such as taking children to school) has largely stabilised.

- What growth there is in this journey type has been driven by recoveries in Auckland, where work journeys increased by 6 points in spite of a variety of disruptions on transport networks.

- Of the less frequent essential journeys, grocery shopping saw significant growth this wave and is nationally at the highest level reported since lockdown began. Again, the driver of this growth has been shopping journey recovery in Auckland, which is up 17 points from where it was at the announcement of community transmission cases.

- Outside of Auckland, non-essential journeys had largely returned to normal levels prior to this wave. Nationally, they continue to increase, again as a result of directional recovery within Auckland, which is beginning to slow.

- Inter-regional travel is also beginning to recover, with visits to friends and family up six points to the highest rate recorded since the middle of level 1.
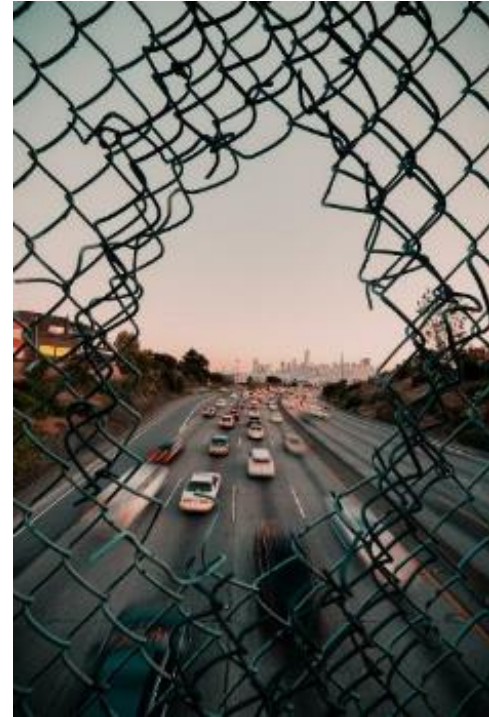
Work journeys nationwide continue to increase directionally and are comfortably back in the range seen during level 1
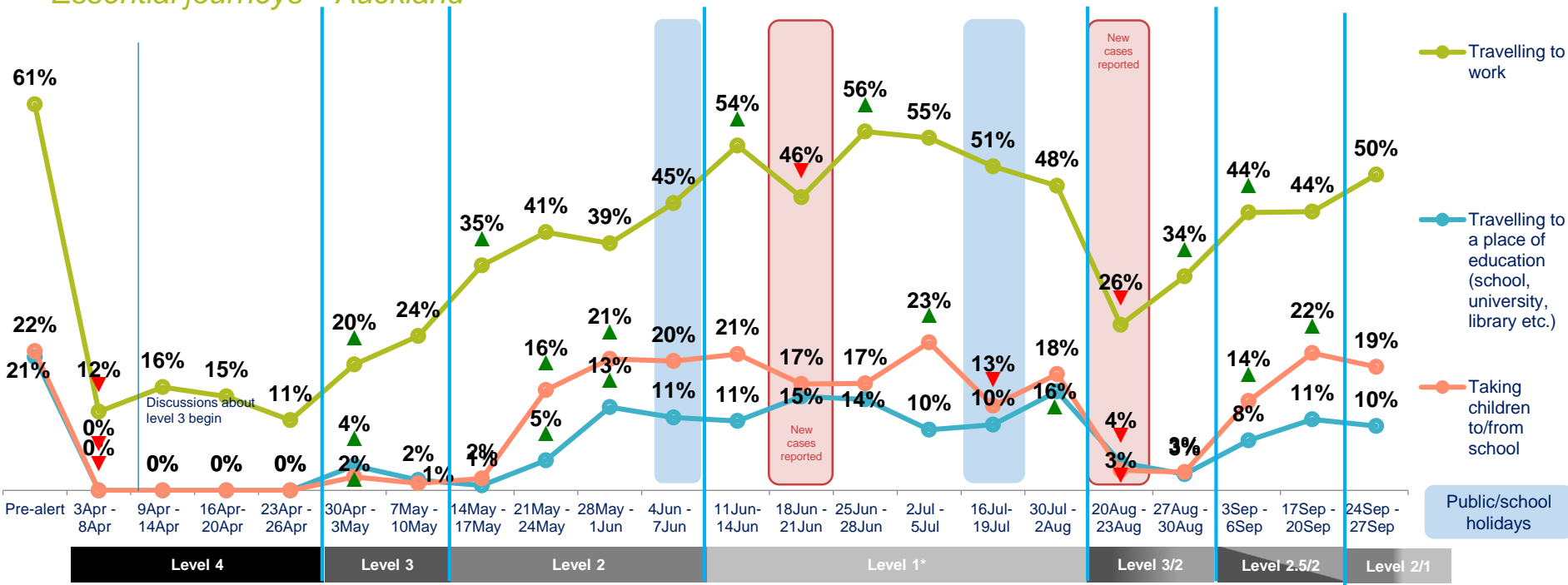
Essential journeys
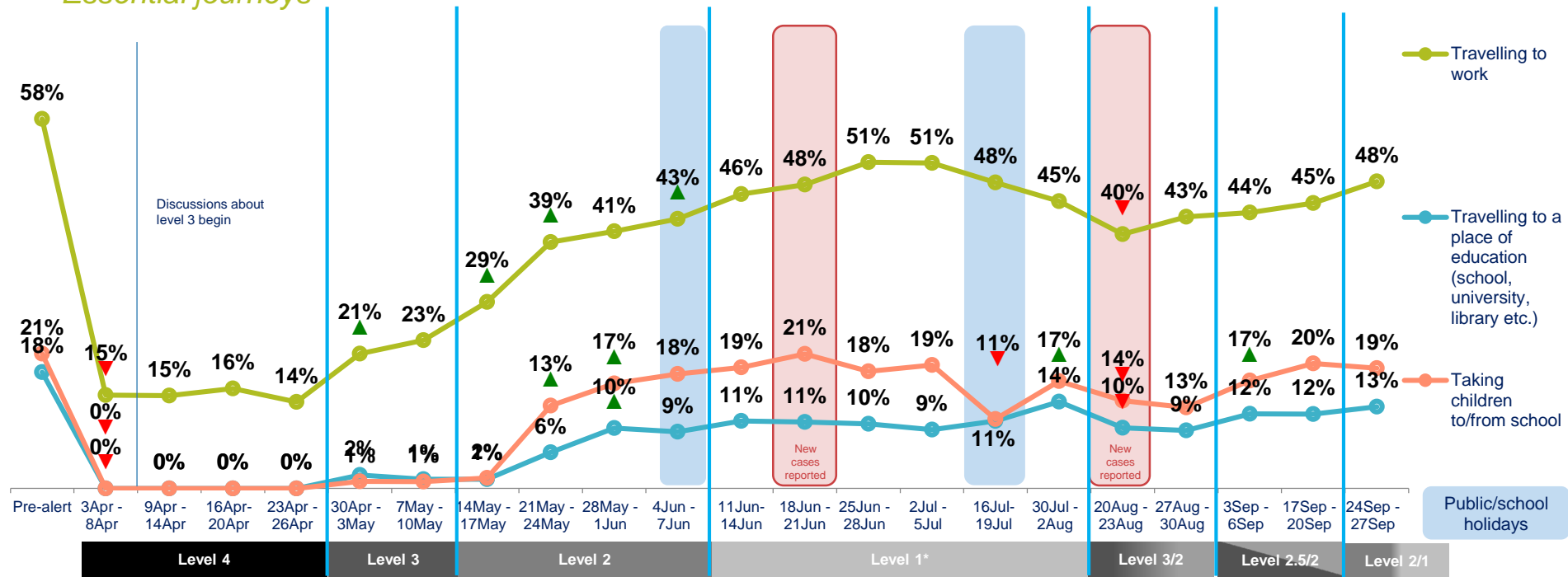
QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: *all adults 15+*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

This directional increase in work journeys is largely driven by the 6 point recovery in Auckland following the level change
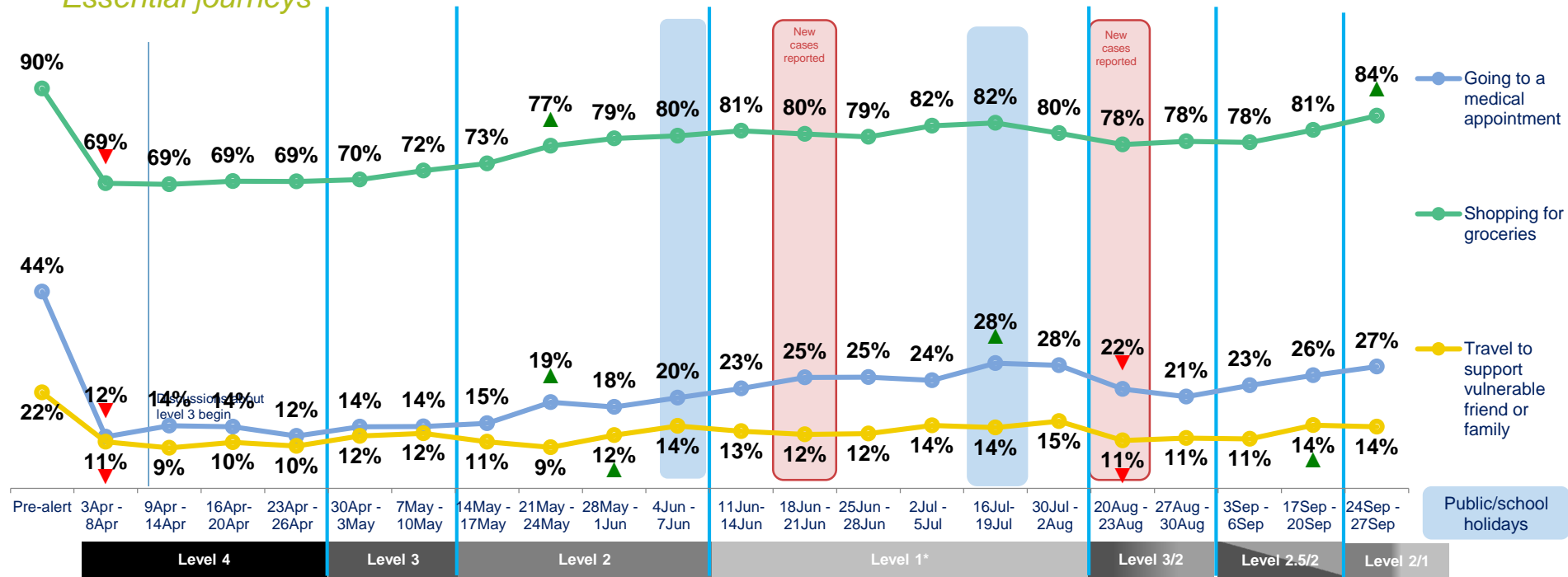
Essential journeys – Auckland

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)*

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△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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Nationally, there's been a significant recovery this week in the proportion reporting at least one weekly grocery shopping trip

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+*
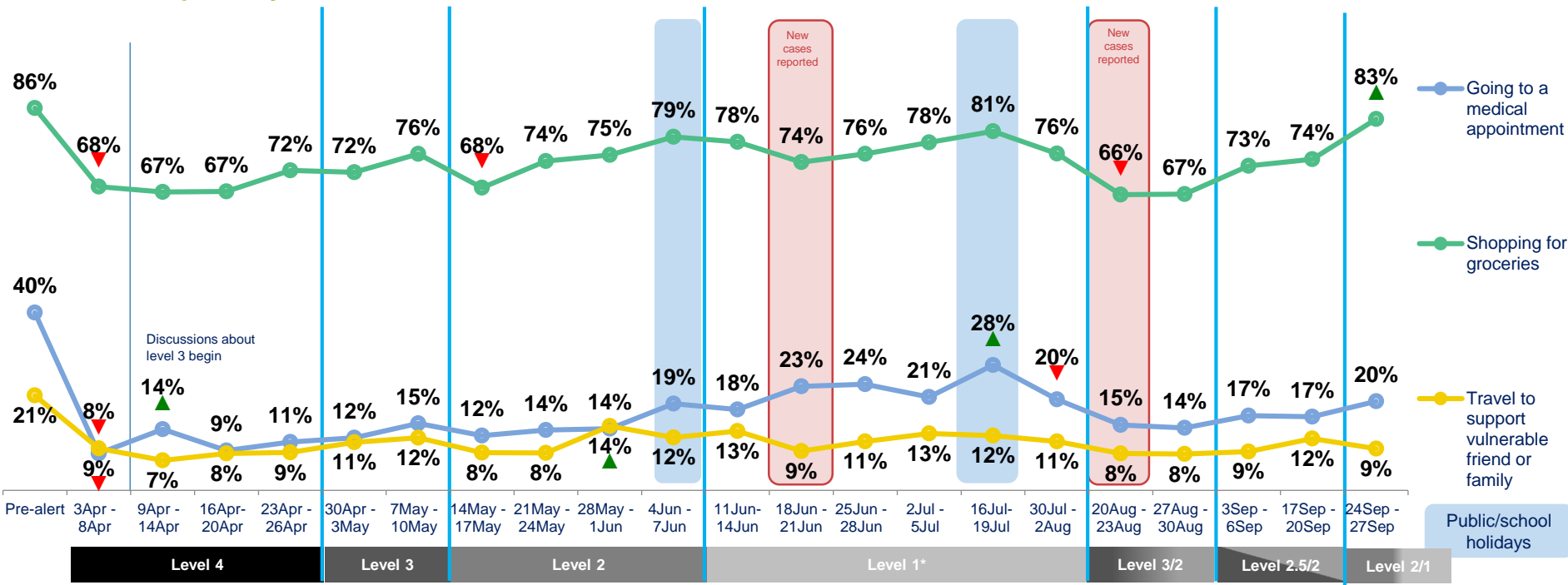
△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

# Auckland has also been the big driver of increased grocery shopping trips

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)*

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

With non-essential journeys mostly already back to normal in other regions, it has been the continued directional recovery in Auckland that has driven this change

Non-essential journeys –Auckland
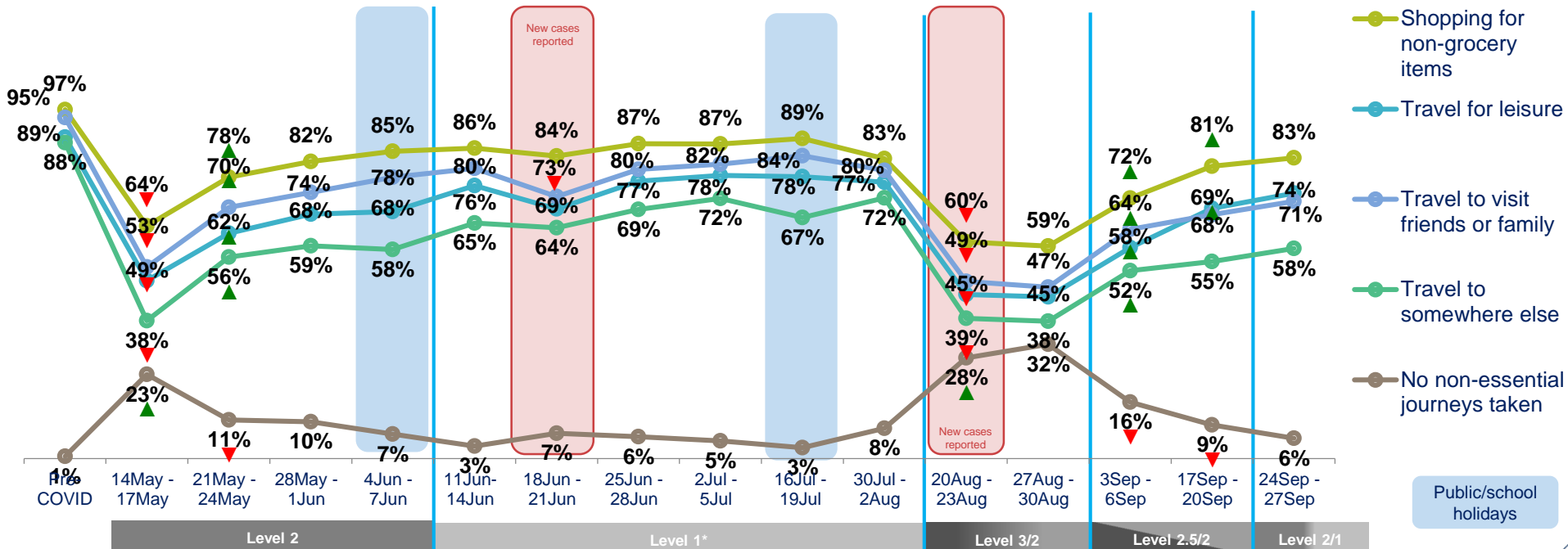
QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
Base: all adults 15+ interviewed during level 2, level 1, level 3/2 and level 2.5/2 in Auckland (n=c. 330 per wave)

Visits to friends and family significantly recovered with the change in alert levels, although inter-regional holidays may not pick up until this week's school holiday

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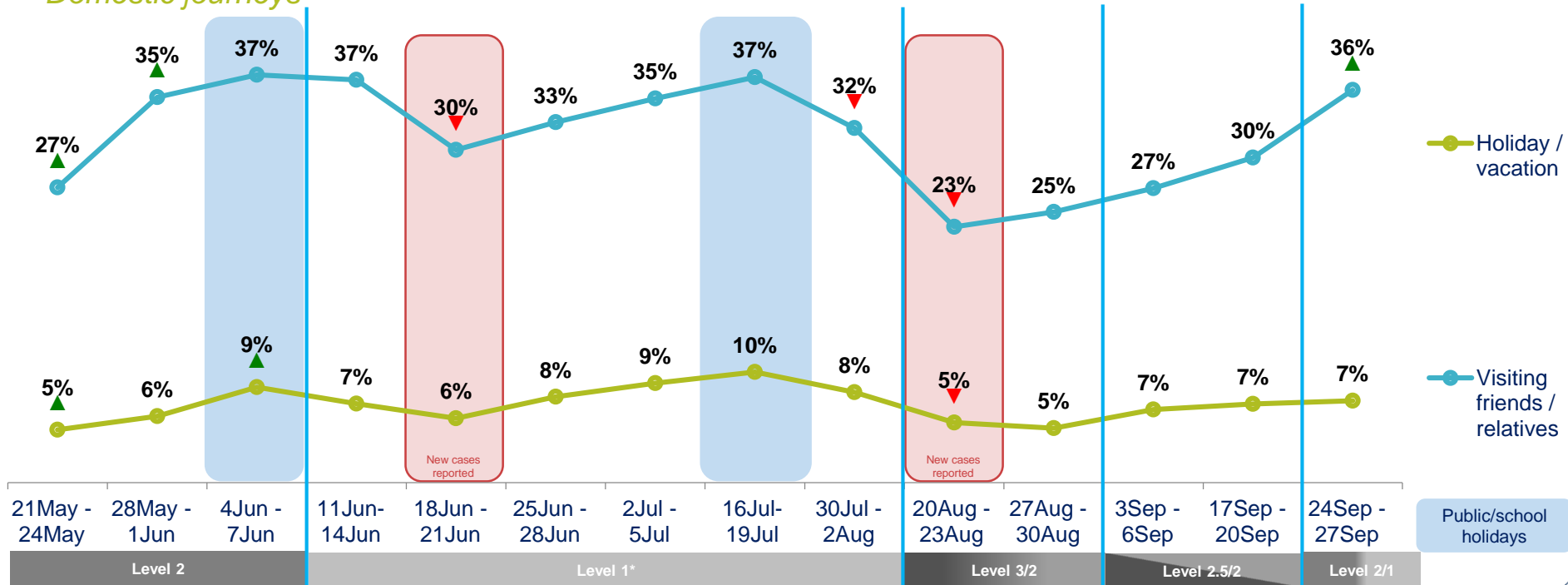
QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

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▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

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Section 6 – 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.

- At the national level, there have been no significant changes to weekly mode usage following the change in alert level. However, this week sees another directional decline in stated weekly public transport use.

- While the changes haven't been statistically significant, there has been a proportionately larger drop off in Auckland when it comes to most public transport modes. The exception being ferries, which may have been impacted by the mode-switching identified among north shore residents impacted by the Harbour Bridge closure.

- Those decreasing public transport usage were more likely to cite singular barriers this wave, rather than an array of obstacles. As a result, we saw a net decrease in most of the themes selected.

- There was difference between Auckland and non-Auckland residents, with the former more likely to say they had reduced need, or that they had transmission concerns. The proportion of Aucklanders selecting the harbour bridge as a reason for decreased public transport usage was negligible.

- Outside of Auckland it is notable that a non-trivial proportion of those decreasing their public transport usage say they've done so because they are worried that others will not wear masks anymore.
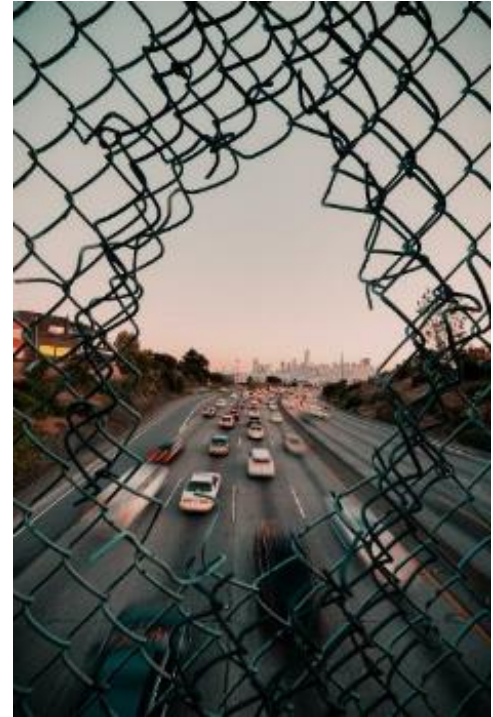
At a national level, weekly travel by all mode types has remained stable, but public transport usage is now 3 points lower than it was in wave 19

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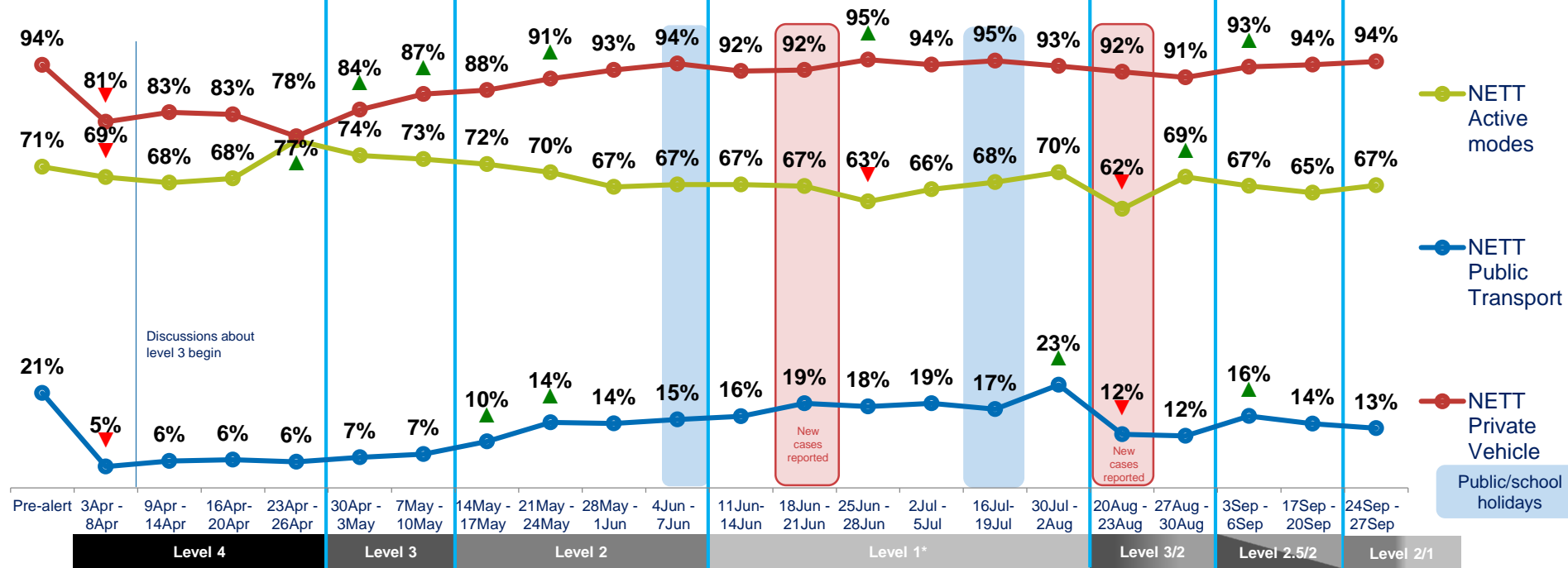
QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys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

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At a high level, patterns of weekly mode use in Auckland have been broadly reflective of the national picture this wave

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)

▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

For the rest of New Zealand, mode usage has remained stable for a number of waves, with private vehicles the only modes to match pre-lockdown weekly usage rates

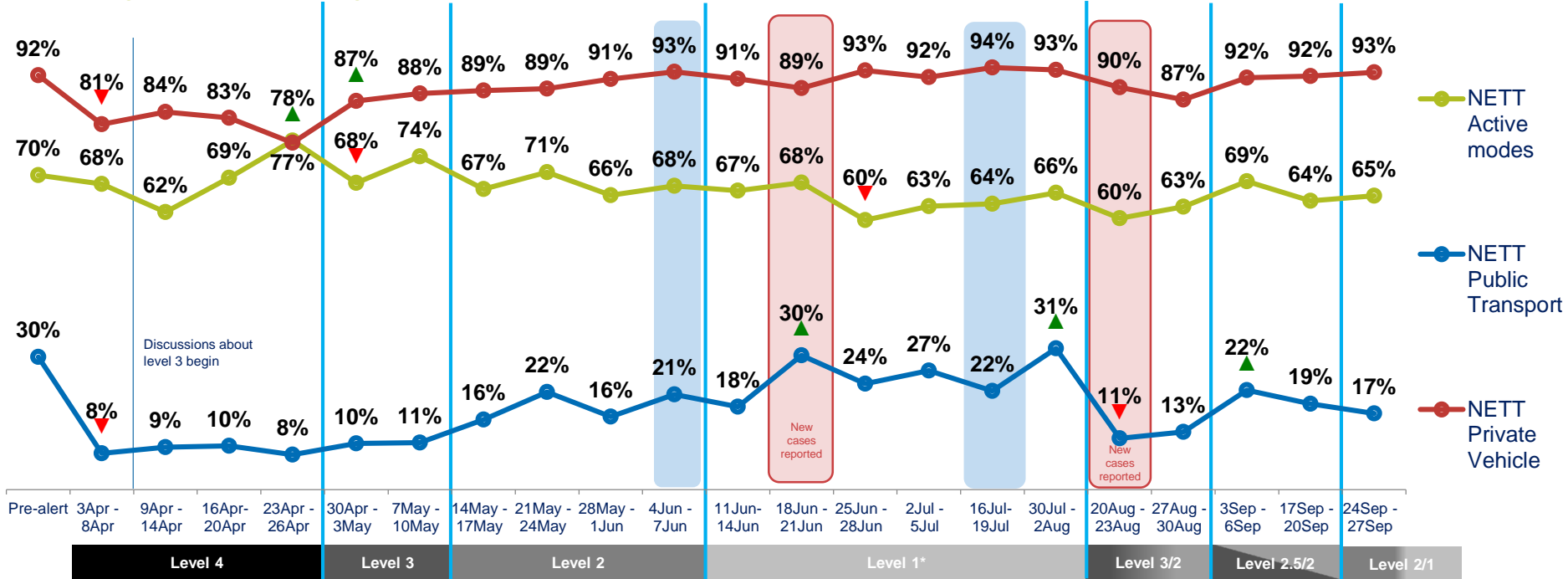*Changes in mode usage by wave, out of Auckland*

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)

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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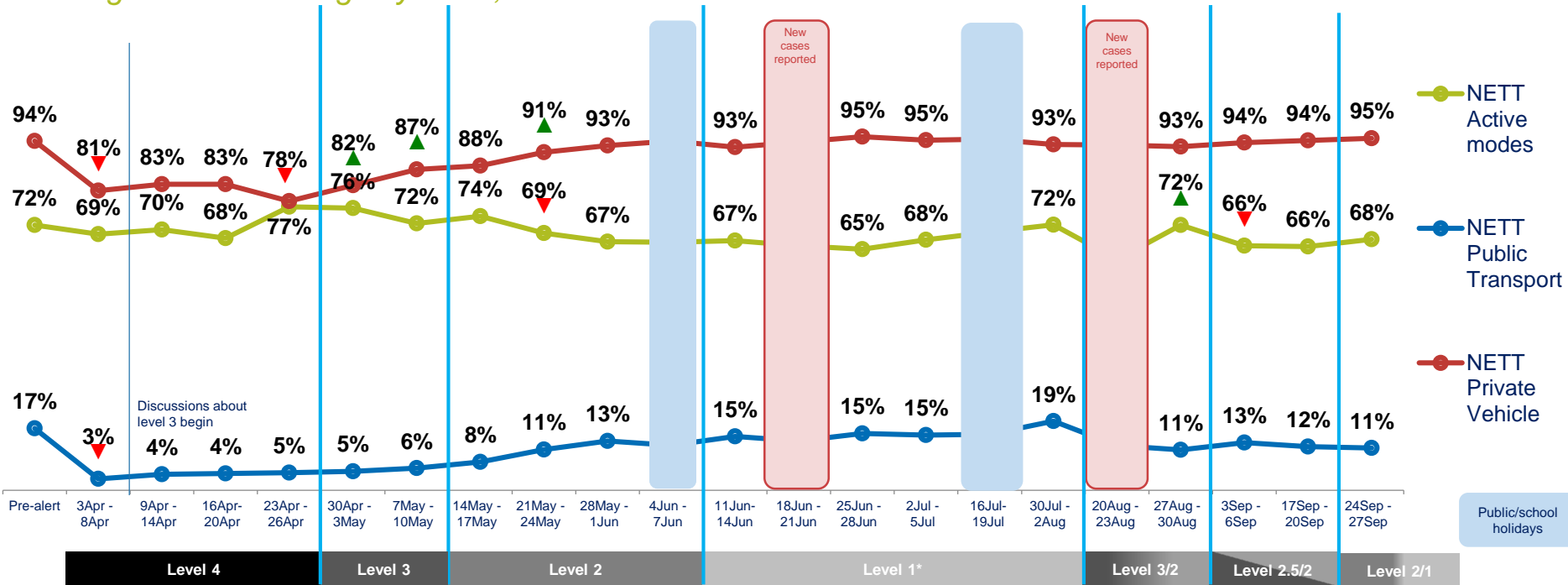# All public transport modes have seen a directional decline at the national level for the past two fieldwork weeks

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

In Auckland, weekly ferry use is the only public transport mode to see a directional increase in usage during the past seven days

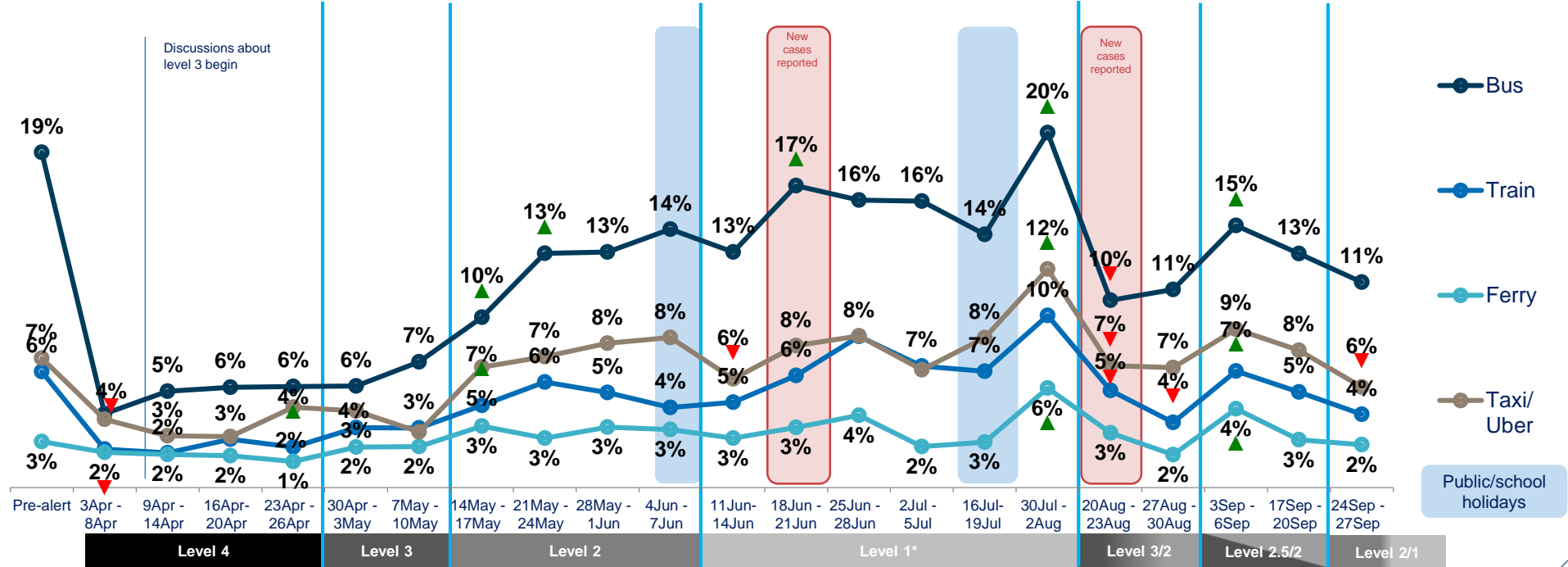*Changes in mode usage by wave, Auckland*

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)

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

While there was also directional drop-off in public transport usage outside of Auckland, this was largely only by one or two points and can be considered stable

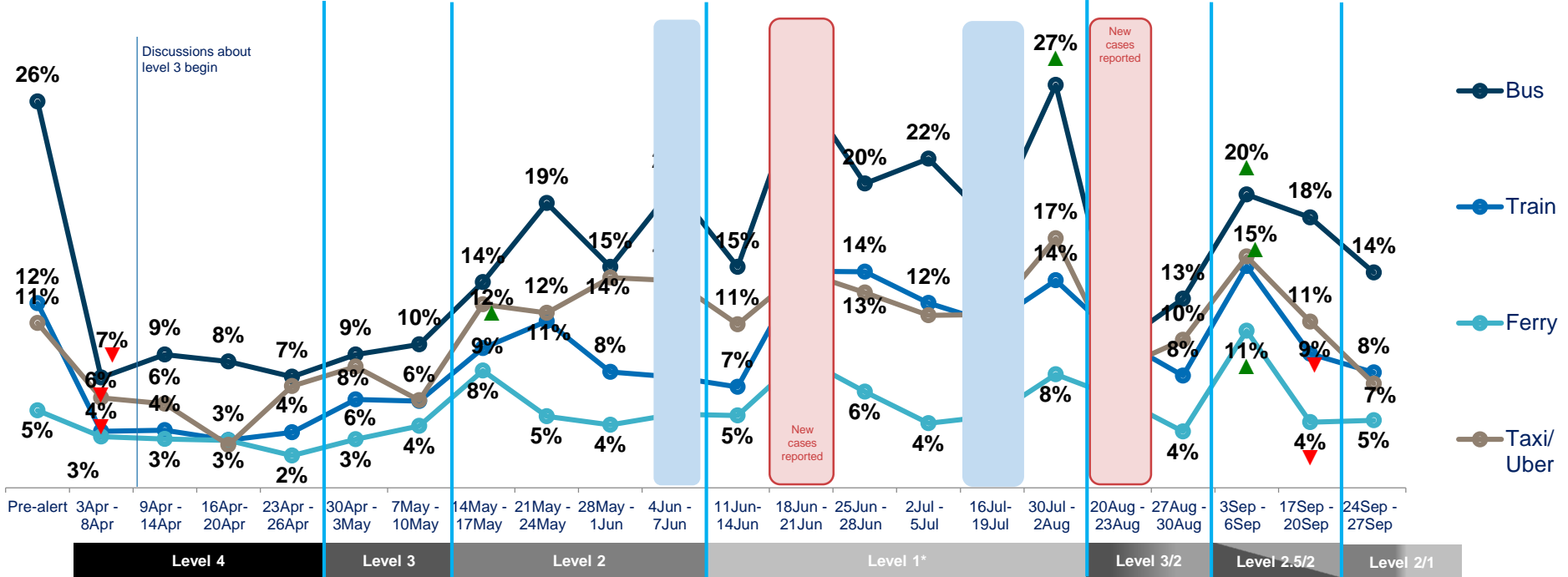*Changes in mode usage by wave, non-Auckland*
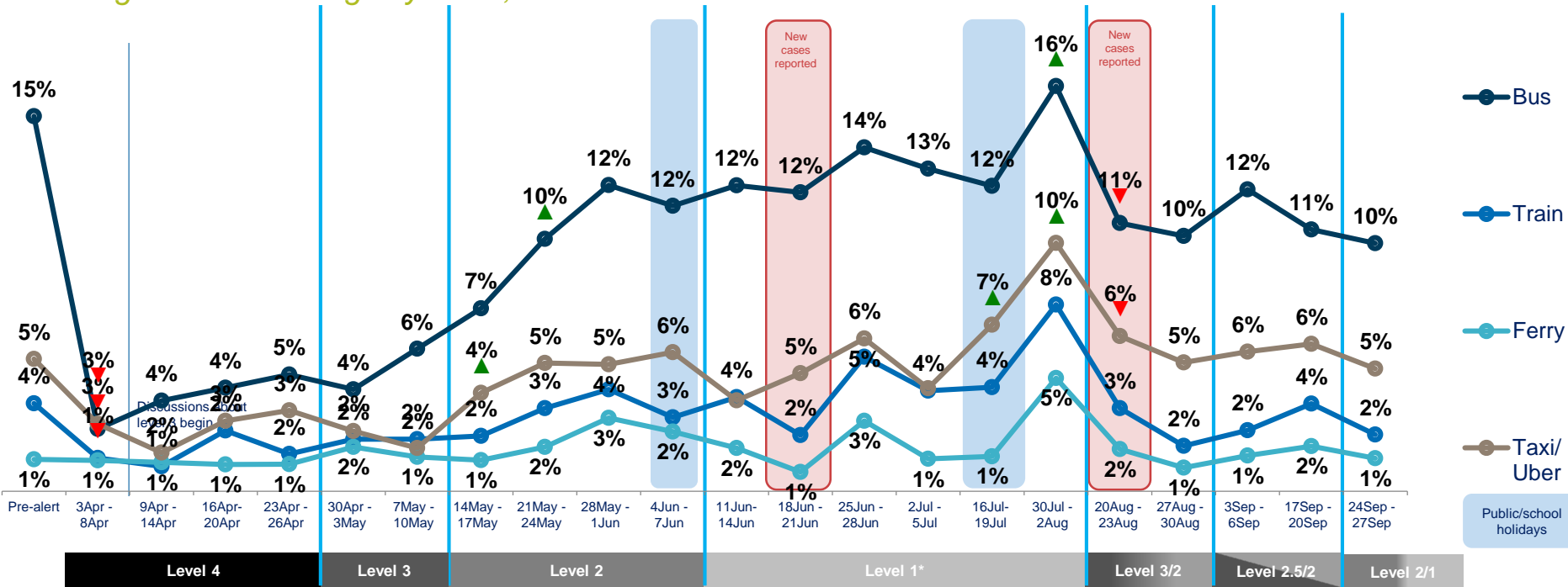
QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys 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)

▲ Indicates a statistically significant increase from previous time period
▼ Indicates a statistically significant decrease from previous time period

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At a macro level, there's a drop in the proportion selecting each group of issues, largely due to more people experiencing singular barriers, rather than an array

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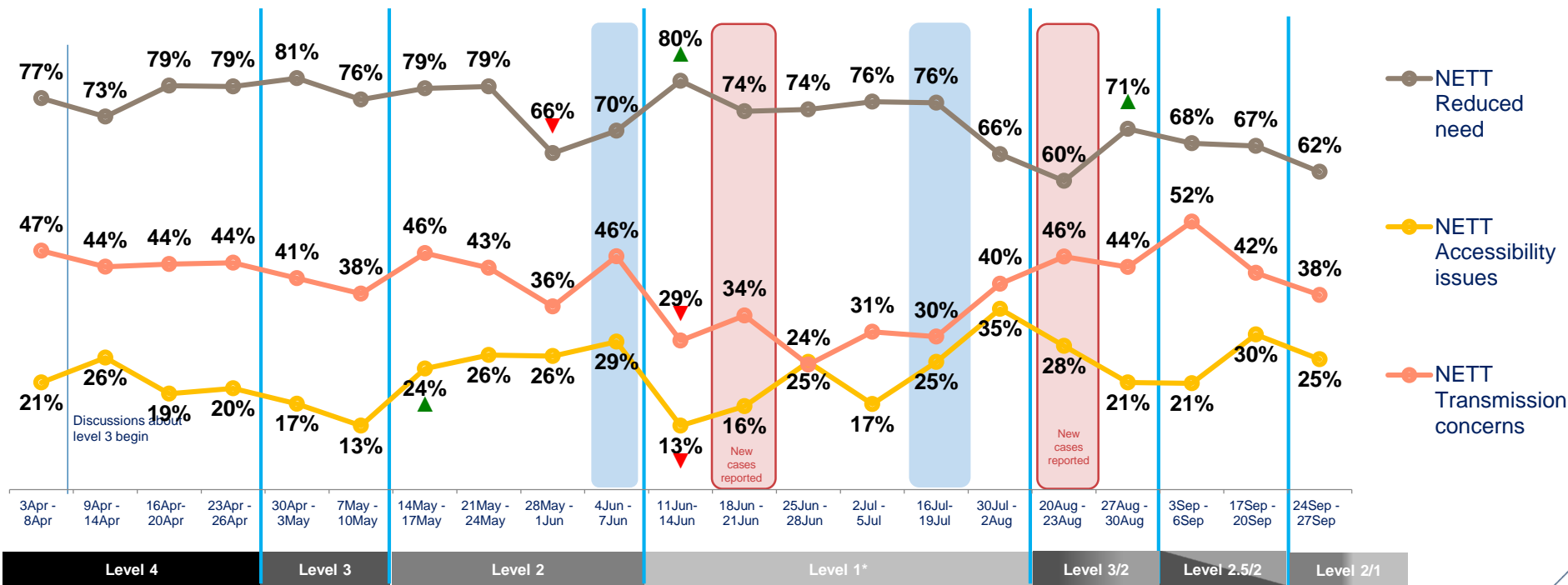
For which, if any of the following reasons, has your use of public transport decreased?
Base: decreasing PT usage in past week

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

This wave, disruption on the harbour bridge had a minimal impact on public transport usage, whilst reduced services were the biggest contributor to accessibility issues

Reasons for decrease in PT activity – Auckland

Reason	%
I am just travelling less in general as I have less reason to do so	45%
Worried about catching Covid-19 from surfaces or people	42%
I don't need to travel to the places that I used to use public transport for (e.g. work)	29%
Reduced services mean it's no longer convenient	25%
I've decided to use private transport options instead	18%
I use my essential journeys as an opportunity to get exercise, instead of using public transport	
The roads are quieter so I'm less likely to get stuck in traffic when driving	14%
Services don't currently stop where I usually catch them	12%
I don't want to have to wear a mask on public transport	7%
The bus, train or ferry is often full and there isn't spaced seating available	5%
The damage to and delays on the harbour bridge mean the public transport I normally use is not feasible	4%
I usually need help using public transport and cannot access that help right now	0%
Other, please specify	7%
Don't know	8%

**Reduced need
70%**

**Transmission concerns
42%**

**Accessibility issues
32%**

QDEC. For which, if any of the following reasons, has your use of public transport decreased?
Base: All in Auckland decreasing PT usage in past week (n=71), wave 21 only

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In other regions, one in 10 of those who have reduced their public transport usage selected that they were concerned about others not wearing masks

Reasons for decrease in PT activity – out of Auckland

Reason	%
I am just travelling less in general as I have less reason to do so	44%
Worried about catching Covid-19 from surfaces or people	27%
I don't need to travel to the places that I used to use public transport for (e.g. work)	18%
I've decided to use private transport options instead	13%
I am concerned that since people are not required to wear masks, most will not wear them	12%
The bus, train or ferry is often full and there isn't spaced seating available	8%
The roads are quieter so I'm less likely to get stuck in traffic when driving	6%
I use my essential journeys as an opportunity to get exercise, instead of using public transport	6%
Reduced services mean it's no longer convenient	4%
Services don't currently stop where I usually catch them	4%
I usually need help using public transport and cannot access that help right now	4%
Other, please specify	26%
Don't know	0%

Reduced need 51%

Transmission concerns 32%

Accessibility issues 15%

QDEC. For which, if any of the following reasons, has your use of public transport decreased?
Base: All not in Auckland decreasing PT usage in past week (n=67), wave 21 only
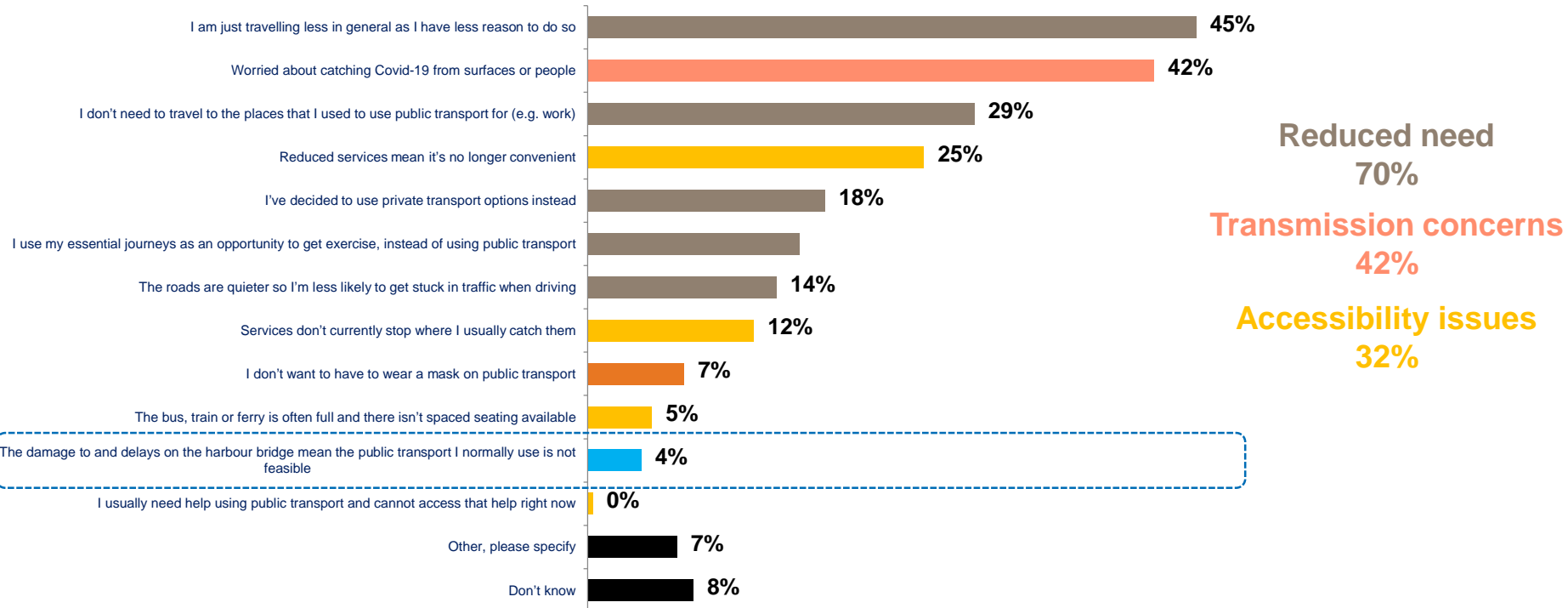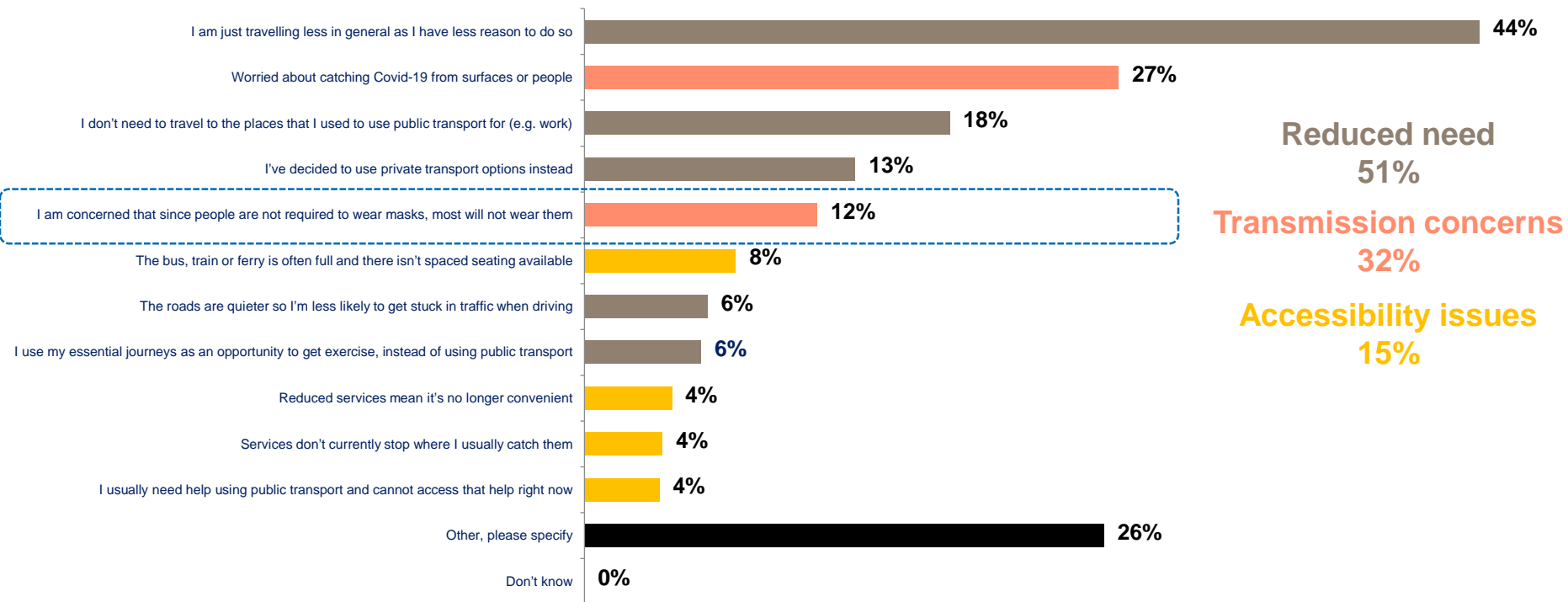
WAKA KOTAHI NZ TRANSPORT AGENCY

△ Indicates a statistically significant increase from previous time period
▽ Indicates a statistically significant decrease from previous time period

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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 national level, the proportion working from home has been stable for some waves now, with the community transmission cases in Auckland resulting in no more than a brief blip. However, it has settled at a higher level since the split level lockdowns began.

- Public transport continues to be disproportionately impacted by this activity.

- In Auckland, the multiple overlapping transportation issues did not result in a statistically significant increase in those working from home, although there was a 3 point directional increase for the first time in three waves.

- Those disruptions that Aucklanders stated as having the highest level of impact on them were slightly more likely to result in a larger net decrease in work travel days. However, this difference between disruptions is not statistically significant and of those measured, COVID-19 related restrictions have the largest quantitative impact on commuter travel.

Nationally, the proportion working from home appears to have stabilise quickly to sit at a slightly higher level than that seen in level 1

Proportion working in and out of home by survey wave
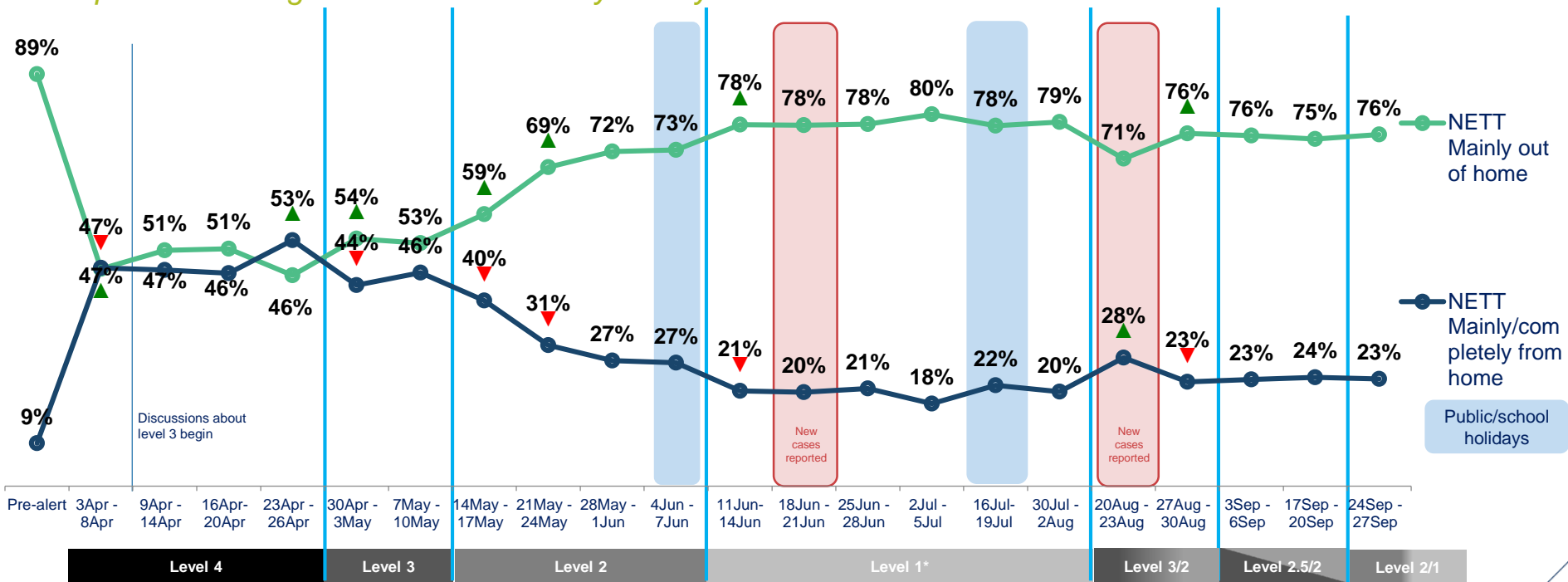
QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?
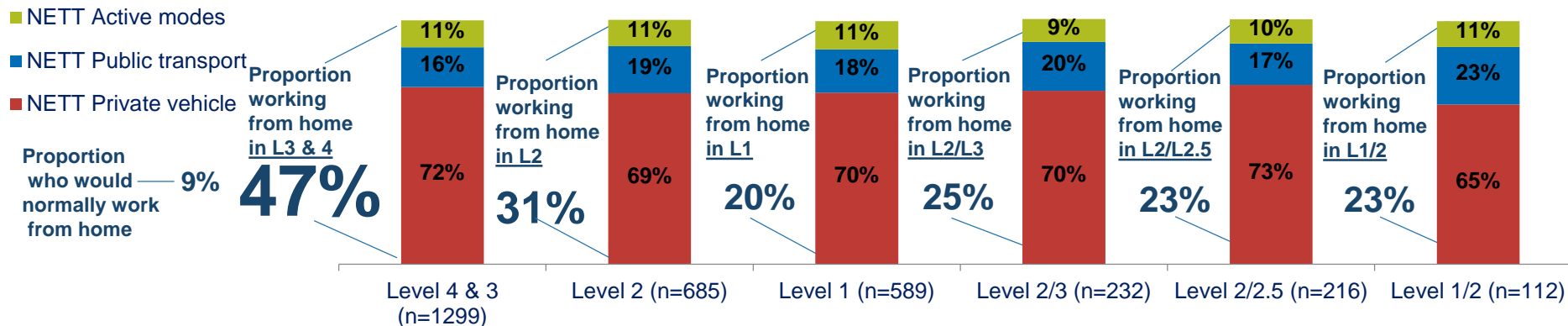*Base: all adults 15+ in Auckland who are usually working*

Indicates a statistically significant increase from previous wave
Indicates a statistically significant decrease from previous wave

Public transport remains the only mode where the proportion working from home is higher than the average across the total working population

Proportion of commuters <u>working from home</u> who would <u>normally travel by each mode</u>

- 🟩 NETT Active modes
- 🟦 NETT Public transport
- 🟥 NETT Private vehicle

Proportion who would normally work from home — 9%

Proportion working from home in L3 & 4
47%

	Level 4 & 3 (n=1299)
NETT Active modes	11%
NETT Public transport	16%
NETT Private vehicle	72%

Proportion working from home in L2
31%

	Level 2 (n=685)
NETT Active modes	11%
NETT Public transport	19%
NETT Private vehicle	69%

Proportion working from home in L1
20%

	Level 1 (n=589)
NETT Active modes	11%
NETT Public transport	18%
NETT Private vehicle	70%

Proportion working from home in L2/L3
25%

	Level 2/3 (n=232)
NETT Active modes	9%
NETT Public transport	20%
NETT Private vehicle	70%

Proportion working from home in L2/L2.5
23%

	Level 2/2.5 (n=216)
NETT Active modes	10%
NETT Public transport	17%
NETT Private vehicle	73%

Proportion working from home in L1/2
23%

	Level 1/2 (n=112)
NETT Active modes	11%
NETT Public transport	23%
NETT Private vehicle	65%

Proportion of each commuter type working from home

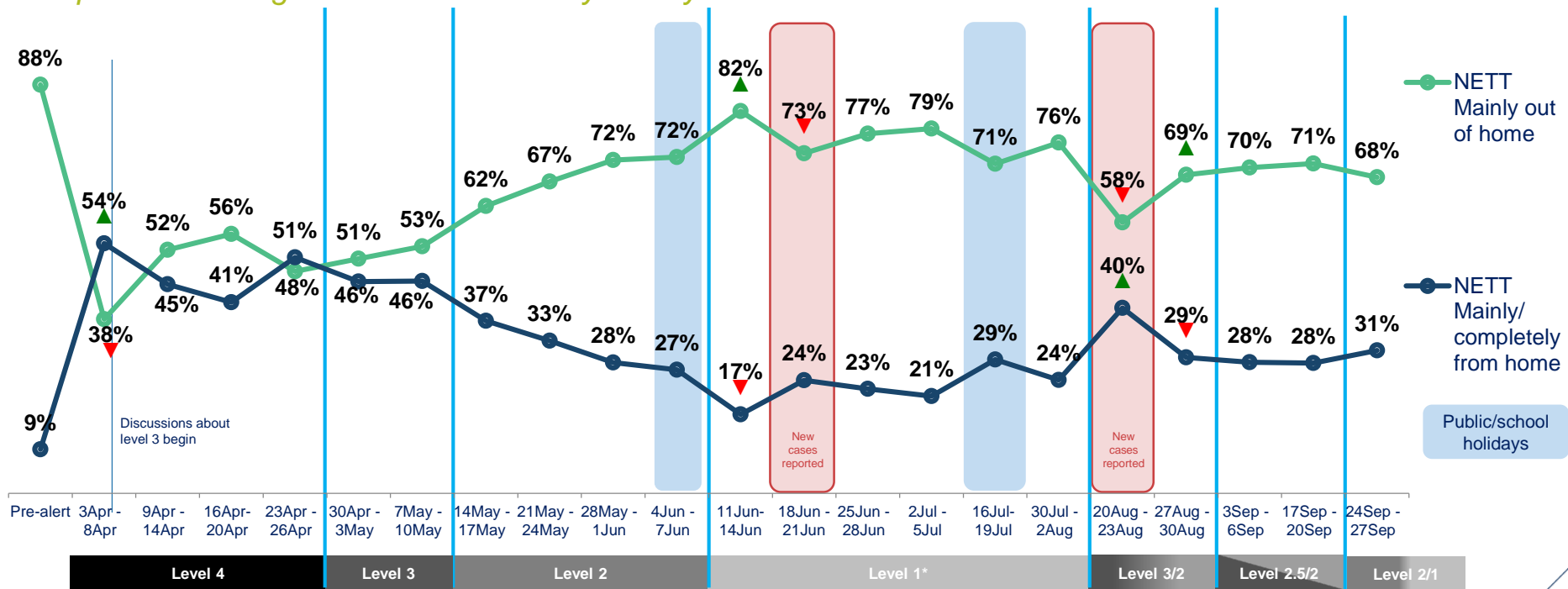|						
Proportion WFH by level	47%	31%	20%	25%	23%	23%
Within active mode commuters	53%	31% ▼	17% ▼	19%	17%	19%
Within private vehicle commuters	43%	25% ▼	13% ▼	18% ▲	16%	14%
Within public transport commuters	62%	42% ▼	24% ▼	38% ▲	33%	36%

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

In the context of multiple overlapping disruptions to travel, there was only a small directional increase in the proportion working from home in Auckland

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

NETT Mainly out of home

NETT Mainly/ completely from home

Public/school holidays

Discussions about level 3 begin

New cases reported

Pre-alert	3Apr - 8Apr	9Apr - 14Apr	16Apr- 20Apr	23Apr - 26Apr	30Apr- 3May	7May - 10May	14May - 17May	21May - 24May	28May - 1Jun	4Jun - 7Jun	11Jun - 14Jun	18Jun - 21Jun	25Jun - 28Jun	2Jul - 5Jul	16Jul - 19Jul	30Jul - 2Aug	20Aug - 23Aug	27Aug - 30Aug	3Sep - 6Sep	17Sep - 20Sep	24Sep - 27Sep

Level 4 | Level 3 | Level 2 | Level 1* | Level 3/2 | Level 2.5/2 | Level 2/1

QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?
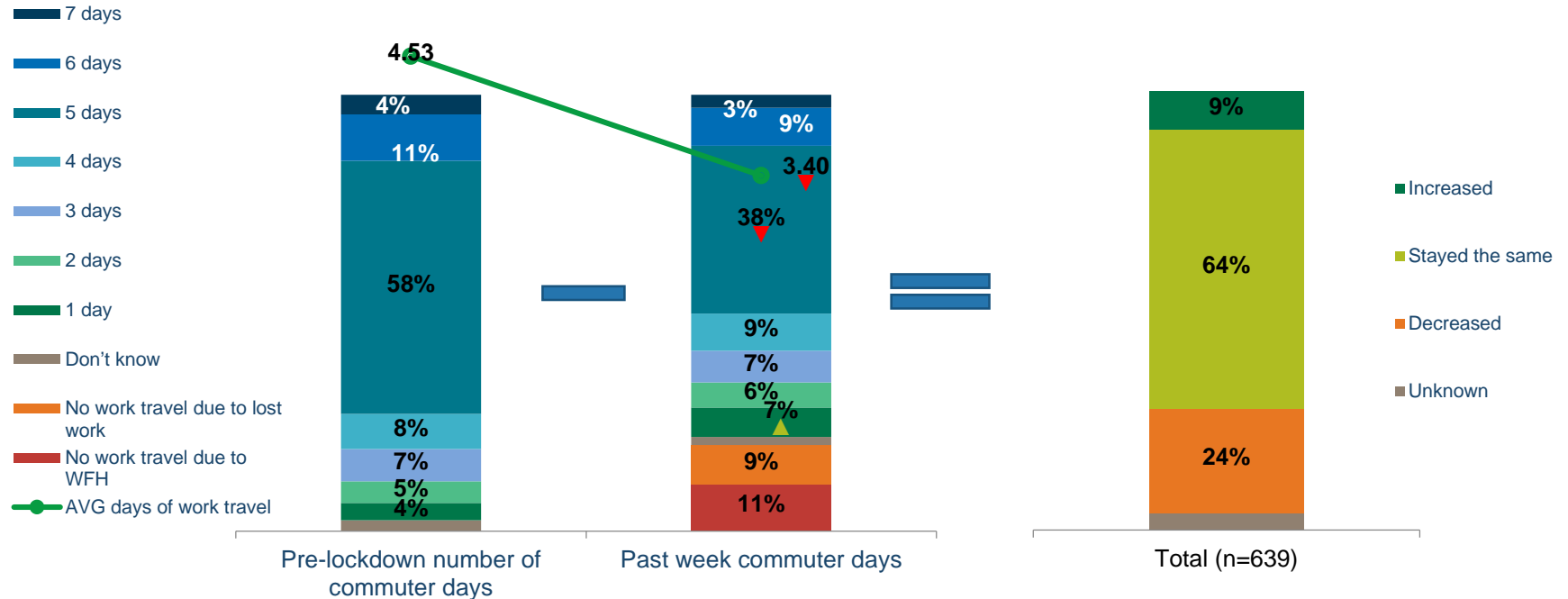*Base: all adults 15+ in Auckland who are usually working*

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▲ Indicates a statistically significant increase from previous wave
▼ Indicates a statistically significant decrease from previous wave

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By looking at pre-lockdown and past week commuter days, we can calculate whether an individual has decreased or increased their work travel and compare sub-groups

Number of commuter days – pre lockdown vs past week   *NET change in commuter days*

Legend:
- 7 days
- 6 days
- 5 days
- 4 days
- 3 days
- 2 days
- 1 day
- Don't know
- No work travel due to lost work
- No work travel due to WFH
- AVG days of work travel

Pre-lockdown number of commuter days:
- 4% (7 days)
- 11% (6 days)
- 58% (5 days)
- 8% (4 days)
- 7% (3 days)
- 5% (2 days)
- 4% (1 day)
- 4.53 (AVG)

Past week commuter days:
- 3%
- 9%
- 38%
- 9%
- 7%
- 6%
- 7%
- 9%
- 11%
- 3.40 (AVG)

NET change legend:
- Increased
- Stayed the same
- Decreased
- Unknown

Total (n=639):
- 9% Increased
- 64% Stayed the same
- 24% Decreased
- Unknown

QWORK1B/2B In a typical week prior to any public health alert or lockdown, on how many days per week did you tend to travel to a place of work (eg office, store, client site)? Thinking about the past week, on how many days out of the past seven did you travel to a place of work (eg office, store, client site)?
Base: all adults 15+ in New Zealand

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