## **Ipsos**

# Waka Kotahi COVID-19 transport impact

# Fieldwork waves 1-24 core report

18 March 2021



# **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: <u>NZTAresearch@nzta.govt.nz</u>.



# **Report content**

### COVID-19 transport impact

- Section 1 About this research
  - Overview & technical notes
- Section 2 Waka Kotahi transport key findings summary
- Section 3 Context
- Section 4 Behaviours
- Section 5 Local and Domestic journeys
- Section 6 Modal changes
- Section 7 Working from home



# 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 longlasting 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  $\sim$ n=1259 per wave, using quotas and data weighting.

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

Average survey duration of between 12-15 mins

• Outside core measures, flexibility to change questions every week

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

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

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

1) Regular\* overview power point report

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

2) An infographic of key data points

visual representative of results for ease of access.

3) Open Data tables

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

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



# **Overview of research (ii)**

#### Question topics in the survey

#### Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys and domestic travel undertaken and changes

change is measured since February 2020.

Modal shift patterns and perceptual shifts

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

Measuring attitudinal shifts towards COVID-19

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

Questions to classify into a variety of segments of interest

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

Ad hoc questions of interest

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



# **Report notes (i)**

### Key information to note for this report

- This report is based on twenty-four waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of fieldwork for specific alert levels, as well as individual waves where appropriate.
- The focus of this report is tracking trends and changes over time and how New Zealanders have adjusted their use of transport and travel behaviour. As this study was not conducted prior to level 4 restrictions, respondents were asked to recall their transport and travel behaviour prior to level 4 restrictions based on a *'normal week'* ie in February this year.
- At a total population level, significance testing indicated in this wave 24 report is based on a statistically significant shift of results between waves 1 to 24, as well as statistically significant shifts between combined alert levels.
- At a sub-population level, significance testing indicates a statistically significant difference between the sub-population and the base or total population. The total population benchmark is based on the total sample base collected across the first four waves of data.

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

\*Please note: During the fieldwork period, on 7 March AKL dropped to Alert Level 2 and the rest of New Zealand moved to Alert Level 1.



# **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		Wave 22		Wave 23		Wave 24	
		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	n= 1,220	2.81	n= 1,247	2.77	n= 1,232	2.79
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	n=331	5.39	n=331	5.39	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	n=97	9.95	n=86	10.57	n=67	11.97
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	n=101	9.75	n=100	9.8	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	n=156	7.85	n=165	7.63	n=161	7.72
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	n=100	9.8	n=100	9.8	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	n=93	10.16	n=100	9.8	n=100	9.8
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	n=342	5.3	n=365	5.13	n=373	5.07
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	n=130	8.6	n=142	8.22	n=142	8.22
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	n=299	5.67	n=305	5.61	n=297	5.69
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	n=131	8.56	n=141	8.25	n=160	7.75

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

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



## **Context: New Zealand COVID-19 timeline - 2020**

	3 February	
-	Travellers leaving from China denied entry to NZ unless they are NZ citizens or permanent	25 June
	residents	12 active COVID-19 cases are confirmed in NZ, with a number of changes implemented to ensure improved border management
	28 February	6 July - present
-	New Zealand confirms its first COVID-19 case	Victoria experiences a resurgence of COVID-19 cases and re-enters lockdown conditions. New cases also
	Travel restrictions introduced for those coming from Iran	begin to appear again in NSW and restrictions begin to be re-imposed.
	14 March	Like New Zealand, Victoria and NSW had previously reached a case load of zero and had seen lockdown
X	Announcement that all travellers arriving in NZ must self-isolate for 14 days upon arrival	restrictions lifted
-	16 March Public gatherings of more than 500 people banned	15 July
4		PM Jacinda Ardern announces response framework going forward, which will involve localised lockdowns in the event of another community-wide outbreak of COVID-19
-	19 March New Zealand bans all non-residents from entering the country	27 July
	Indoor events of more than 100 people now banned	Tertiary institutions re-open for face-to-face lectures, with corresponding increase in traffic and mode used
<b>—</b>	21 March	11 August
	PM Jacinda Ardern announces a four level, country-wide alert system	New Zealand confirms four new community transmitted cases of COVID-19 in Auckland. PM Jacinda Ardern
	New Zealand at alert level 2	announces that Auckland will move to level 3 and the rest of New Zealand will move to level 2 at noon, 12
	23 March	August
	NZ upgraded to level 3, public notified this would be raised to level 4 at 11:59pm, 25 March.	12 August Auckland moved to alert level 3 at noon, rest of New Zealand moved to alert level 2
	Non-essential services required to close in 48 hours	12 August
	24 March All public transport to be free during lockdown period	New Zealand Police set up nine checkpoints at the borders of the Auckland region to monitor who is
	25 March	entering and exiting the city. Aucklanders asked to leave or enter for essential purposes only. 24 August
T	New Zealand upgraded to level 4, resulting in a nationwide lockdown	PM Jacinda Ardern announces that Auckland will remain at level 3 until 11.59pm on 30 August, with the rest
	3 April Waka Kotabi COVID-19 impact tracker fieldwork begins	of the nation remaining at level 2. Masks will be come compulsory on public transport.
	20 April	30 August Auckland moved to alert level 2.5 at midnight, rest of New Zealand remains at alert level 2
T	PM Jacinda Ardern announces NZ will move to level 3 at 11:59pm, 27 April, remaining	
	there for at least two weeks	4 September
<b>—</b>	27 April	PM Jacinda Arden announces alert levels to remain in place for at least 10 more days.
	New Zealand moved to alert level 3 at 11:59pm	14 September
	4 May	PM Jacinda Arden announces alert levels to extend one more week and social distancing rules on transport
Ι	First day where no new COVID-19 cases are recorded in NZ	to be relaxed, with mask wearing remaining compulsory
	11 May	21 September
	PM Jacinda Arden announces that New Zealand will move to level 2 at 11:59pm, 13 May, with	PM Jacinda Arden announces Auckland will move to level 2 on 23rd & the rest of New Zealand will move
	schools to open Monday 18 May and bars Thursday 21 May.	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
	13 May	
I	New Zealand 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.
	18 May & 21 May	7 October Auckland moved to alert level 1 at midday to match rest of New Zealand
1	All schools open to students on Monday and bars allowed to open Thursday	12 November
	8 June - New Zealand moved to alert level 1 at 11:59pm	Single community transmission case reported in Auckland, with Auckland CBD workers urged to work from
-	16 June	home. These conditions are lifted the following day. Reported community outbreak in Wellington as well.
	Two new COVID-19 cases are confirmed after 24 days with no new cases, followed by more new cases.	nome. These conditions are inted the following day. Reported continuity outpreak in Wellington as well.



# **Context: New Zealand COVID-19 timeline - 2021**

#### 14 February 3 new cases of COVID-19 are recorded in the community. Auckland moves to Alert Level 3 at 11:59pm. The rest of New Zealand moves to Alert Level 2. 17 February 2 new cases of COVID-19 are detected in the community, both linked to the Feb 14 cluster. Auckland moves to Alert Level 2 at 11:59pm. The rest of New Zealand moves to Alert Level 1. 22 February Auckland moves to Alert Level 1 at 11:59pm. All of New Zealand is now at Level 1. 28 February There are now 15 cases linked to the Papatoetoe cluster. Auckland moved into Alert Level 3 at 6am. The rest of New Zealand moves to Alert Level 2. 7 March All new cases are in managed isolation facilities. Auckland drops to Alert Level 2, the rest of the country drops to Level 1. 12 March At midday, Auckland moves to Alert Level 1.





# Section 2 – Waka Kotahi transport key findings summary





# Key findings – waves 1-24

#### Waka Kotahi COVID-19 transport impact tracker

- Wave 24 of fieldwork took place after a week in which Auckland was placed in alert level 3 restrictions, following community transmission cases in the city. The rest of the country was under level 2 restrictions.
- Concerns about transmission spiked as expected following the new community cases, but these were mostly concerns about transmitting the virus to others rather than risk of infection to oneself. This concern was mainly driven by people residing outside of Auckland.
  - Perceived adherence to lockdown restrictions and social buy-in to following guidance is much lower in March 2021 than it was almost a year ago at the height of the alert level 4 lockdown. This may be related to COVID fatigue or over-confidence among the population feeling more strongly that it is better prepared to navigate lockdowns than before.
  - As a result, a large majority of people both in and out of Auckland expressed concern that people have stopped seeing COVID-19 as a threat and are not following guidelines.
- Reports of self-isolation repeated the pattern seen during the comparable lockdown period in August 2020, with 31% at least partially self-isolating.
  - However, this didn't necessarily translate into other behaviours, such as mask wearing in supermarkets, that help prevent the spread of the virus.
- Nearly all frequent and less frequent essential and non-essential journeys followed a similar pattern of decline to the comparable lockdown period in August 2020. However, work journeys were a notable exception, with the decline not as significant as it was in the winter lockdown.
- The impact of this lockdown on most transport modes was similar to the comparable period in August 2020, with public transport modes more acutely affected.
  - However, New Zealanders did not express a heightened transmission concern as a reason not to travel in this way and also seemed more confident of using buses trains and ferries in the coming week after a short lockdown. Instead it was a reduction in need that drove declines in use.
- Patterns of working from home suggest adjustment by employers and employees to enable a greater volume of workers to be on site during level 3.
   Patterns more closely match the second week of split-level lockdown in August 2020, which saw a significant return to the workplace compared to the first week.
  - In re-visiting data on working from home feasibility from June and July 2020, it is apparent that public transport and active modes are disproportionately impacted by working from home because more people who commute this way are able to work from home.
  - Among private vehicle, active mode and public transport commuters, the same proportion (roughly a third) of those able to work from home chose to do so at this time.



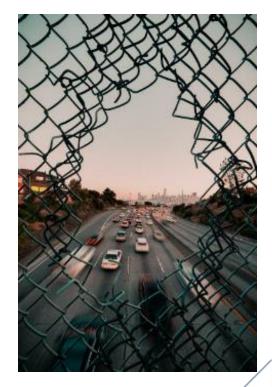




# Key findings – context

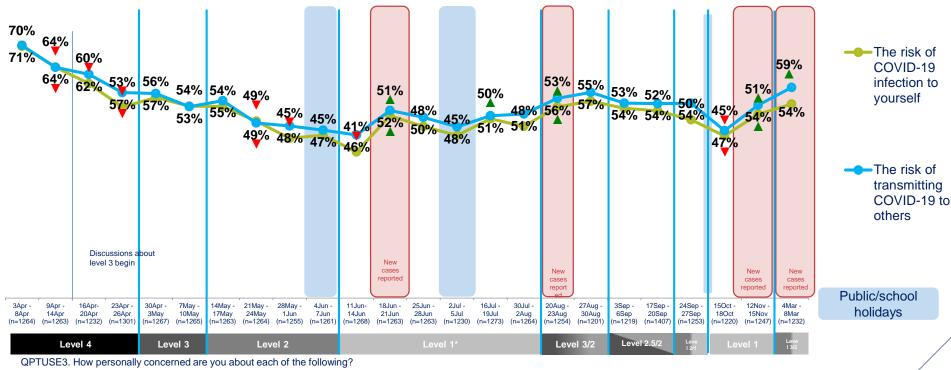
# Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- 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 at the end of a week in which a new COVID cluster in Auckland had lead to the third level 3 lockdown in the city, with the rest of the country in level 2.
- Compared to the last wave in November, concern about risk of transmission to others spiked significantly, reaching the highest rate seen since the early stages of lockdown in 2020. This was primarily driven by significant increases in concern outside of Auckland.
- Most economic concerns remained stable since November 2020, but there has been a national increase in concern about personal finances which is likely less informed by COVID outbreaks and more about other economic stories.
- Given Auckland has been the site of most community transmission cases since the initial outbreak, Aucklanders have consistently expressed greater concern about seeing a new cluster in their region or a new outbreak in the country, but the rate of this concern did not change a great deal from November to March.
- Perceived adherence to lockdown restrictions and social buy-in is much lower in March 2020 than it was almost a year ago at the height of the alert level 4 lockdown, this may connect to COVID-fatigue in the general population.
- This may be linked to the fact that New Zealanders seem to feel more strongly in their confidence about navigating new lockdowns, with one in five agreeing that they were better prepared for this lockdown than for previous ones.
- Perhaps as a result of this, the majority of people both in and out of Auckland expressed concern that people have stopped seeing COVID-19 as a threat and are not following guidelines.





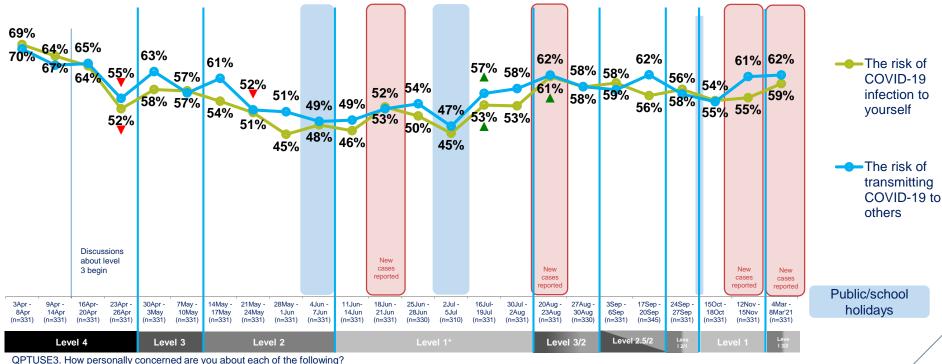
Nationally, concerns about transmission increased significantly following the new level 3 lockdown in Auckland to the highest level seen since level 4 *COVID-19 concerns (NETT all concerned)* 



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 While concern about infection increased directionally in Auckland, this change was not statistically significant, stated concern was similar to last level 3 in August COVID-19 concerns (NETT all concerned) – Auckland



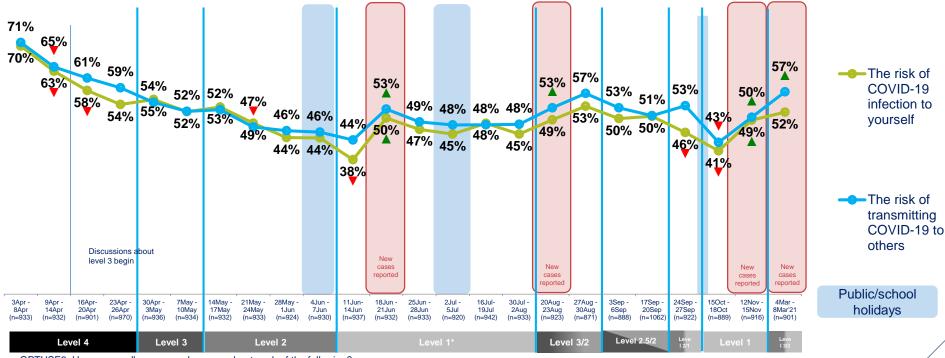
Base: all adults 15+ in Auckland \*fieldwork frequency decreased from weekly during level 1

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

Outside of Auckland, infection concerns did not increase to a significant extent, with the biggest change a rise in concerns about transmitting COVID to others COVID-19 concerns (NETT all concerned) – rest of New Zealand

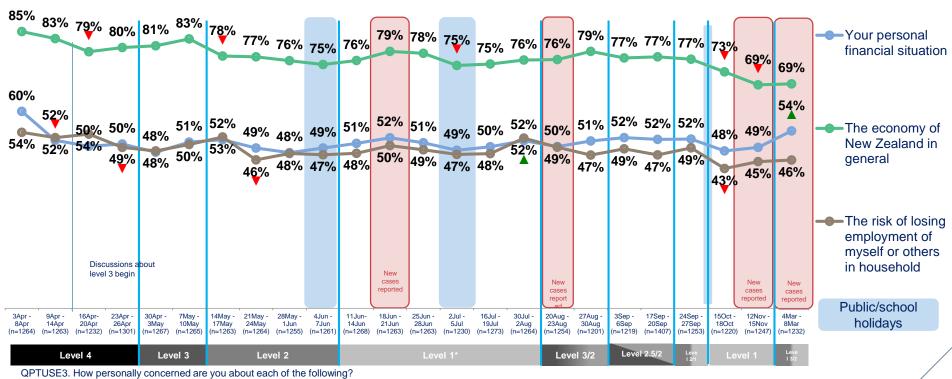


QPTUSE3. How personally concerned are you about each of the following? Base: all adults 15+ not in Auckland \*fieldwork frequency decreased from weekly during level 1



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

Worries about personal finances increased sharply to the highest level since the beginning of the first lockdown, concerns about the national economy are unchanged *Economic concerns (NETT all concerned)* 

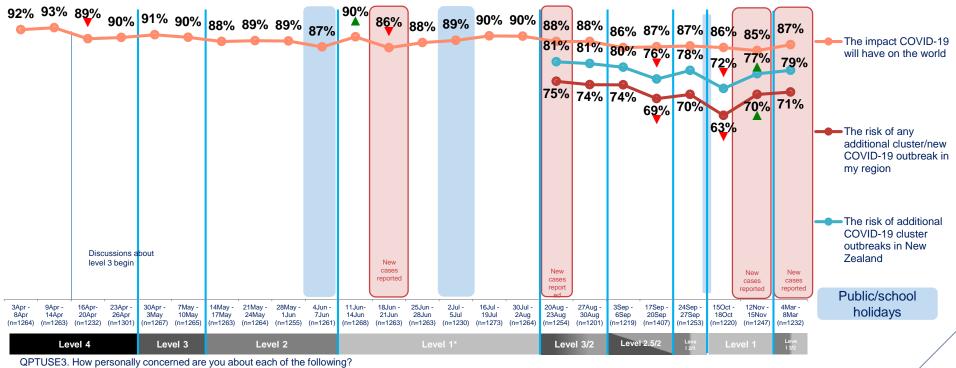


Base: all adults 15+ in New Zealand \*fieldwork frequency decreased from weekly during level 1



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

Nationally, the news of new community transmission cases did not materially increase stated concern about new outbreaks at a regional or national level *COVID-19 concerns (NETT all concerned)* 



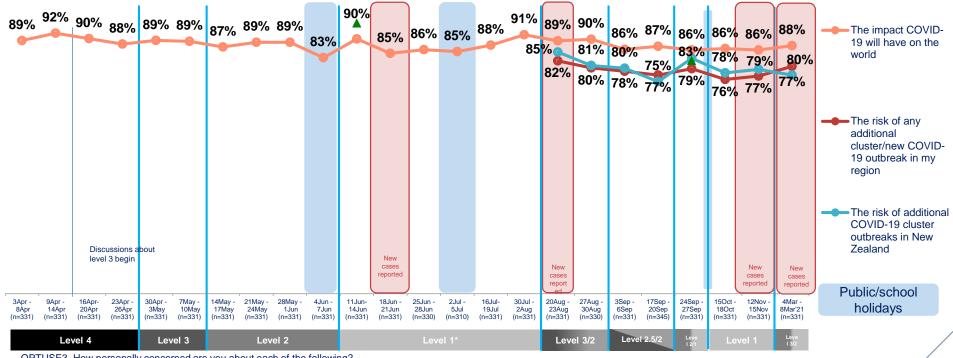
Base: all adults 15+ in New Zealand \*fieldwork frequency decreased from weekly during level 1

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

Concern about additional cluster outbreaks has consistently been higher in Auckland, but the new level 3 lockdown in the city did not cause a further spike in this worry *COVID-19 concerns (NETT all concerned) – Auckland* 



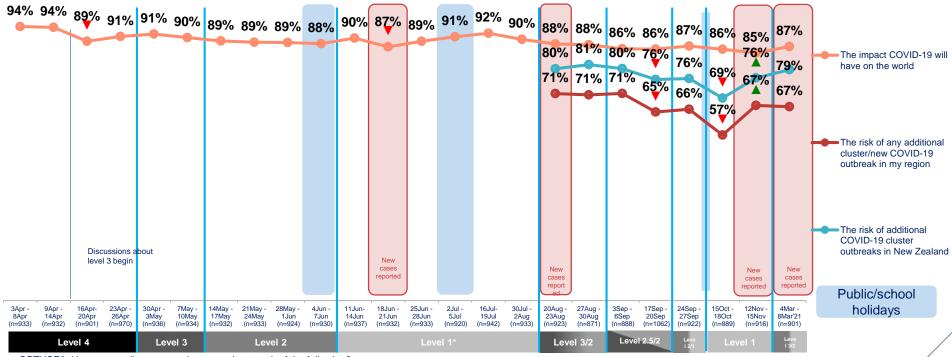
QPTUSE3. How personally concerned are you about each of the following? Base: all adults 15+ in Auckland \*fieldwork frequency decreased from weekly during level 1



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

## Outside of Auckland, these types of concerns are largely unchanged from November

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



New Zealand Government

QPTUSE3. How personally concerned are you about each of the following? Base: all adults 15+ not in Auckland \*fieldwork frequency decreased from weekly during level 1

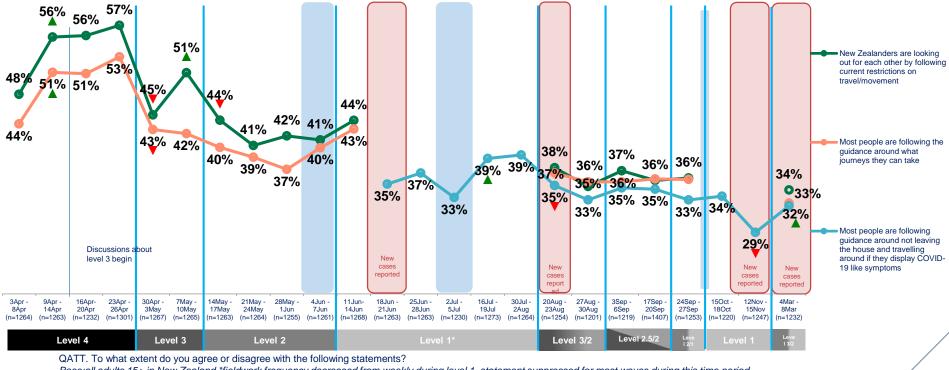
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Indicates a statistically significant increase from previous time period Indicates a statistically significant decrease from previous time period

## Around a third agree with each of the aspects of adherence tested, but perceived public buy-in is around 20 points below the peak at the end of the initial level 4

Perceived public attitudes to following COVID restrictions



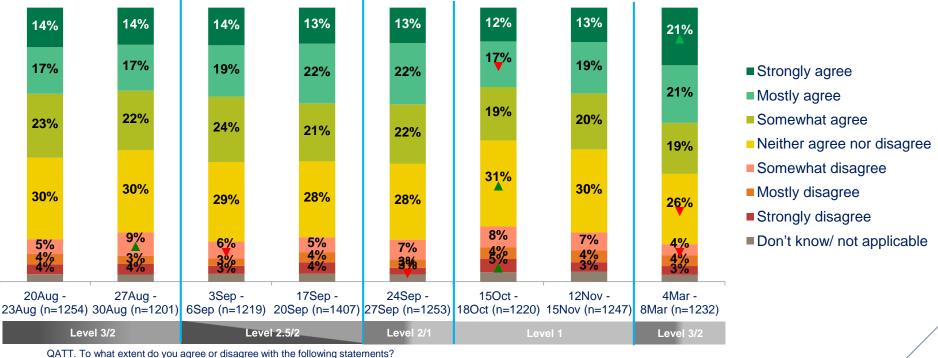
Base:all adults 15+ in New Zealand \*fieldwork frequency decreased from weekly during level 1, statement suppressed for most waves during this time period



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Indicates a statistically significant increase from previous time period Indicates a statistically significant decrease from previous time period There are indications of greater confidence and comfort in lockdown, as a fifth of New Zealanders *strongly* agree that they were better able to adjust to restrictions

I was able to adjust better to travel restrictions and get the things I need than I was following the first outbreak of COVID-19



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

WAKA KOTAHL

Nationally, around a third of people express extreme concern about decreased adherence to COVID-19 guidelines, this is no higher in Auckland than the rest of NZ *People have stopped seeing COVID-19 as a threat and are not following guidelines* 



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

А



Indicates higher than total to a statistically significant extent Indicates lower than total to a statistically significant extent





# Key findings – behaviours

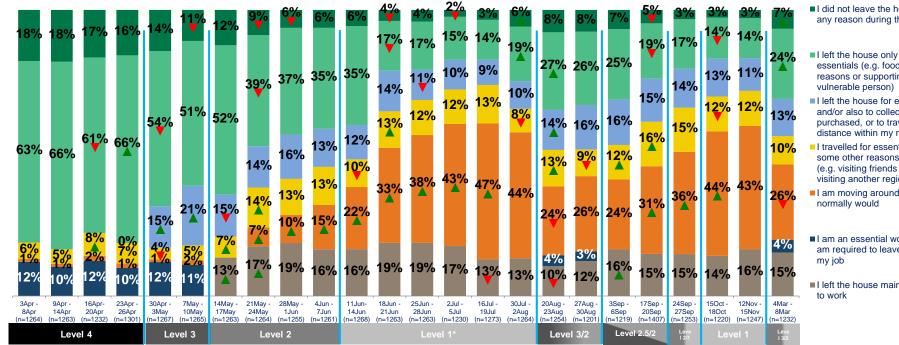
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- In light of changing attitudes and concerns around COVID-19 in the country, New Zealanders may change their behaviour in different ways to adapt to their situation. This includes moderating the amount of weekly travel undertaken or taking certain steps to protect oneself in transit, such as wearing masks.
- Reports of self-isolation repeated the pattern seen during the comparable lockdown period in August 2020 when Auckland reverted to alert level 3 and the rest of New Zealand was at alert level 2.
- This was driven in a similar way by higher self-isolation in Auckland where 59% reported at least partial self-isolation for the preceding seven days, compared to a 31% national average.
- Within Auckland there was some reversions in intention to use masks and face coverings when shopping, although this was not as strong as that seen during the comparable August lockdown.





The new lockdown brought an increase in self-isolation, with the general profile of behaviours similar to the last comparable lockdown in 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

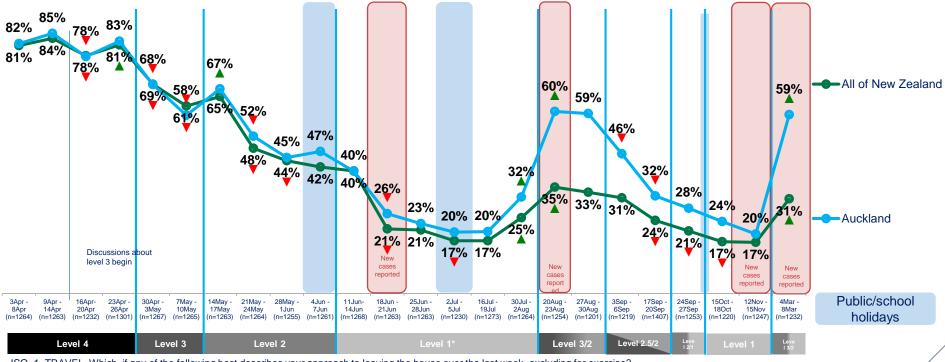


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Indicates a statistically significant increase from previous time period Indicates a statistically significant decrease from previous time period I did not leave the house for any reason during this week

- I left the house only for essentials (e.g. food, medical reasons or supporting a
- 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 (e.g. visiting friends or family, visiting another region)
- I am moving around as I
- I am an essential worker and/or am required to leave home for
- I left the house mainly to travel

After reverting towards the national average in the summer, self-isolation in Auckland increased to about three in five, a similar pattern to the comparable August lockdown *Self isolation over time* 



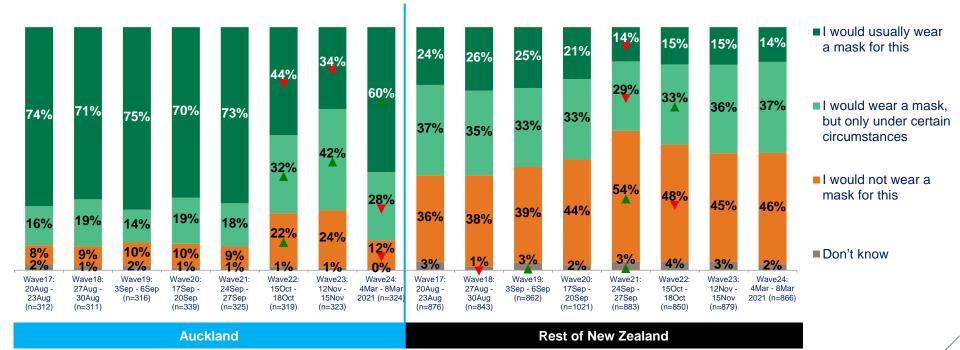
ISO\_1\_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise? Base:all adults 15+ in New Zealand (n= c.1,260 per wave), all in Auckland (n=c.331 per wave), \*fieldwork frequency decreased from weekly during level 1



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

The change in alert level meant that intention to wear face coverings strengthened significantly in Auckland, although was not as high as in August and September *When shopping for groceries (eg in a supermarket)* 



New Zealand Government

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+ in New Zealand who would normally do this activity

NOTE: question suspended during times that masks were compulsory on public transport

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

# Section 5 – Local and domestic journeys



# Key findings – local and domestic journeys

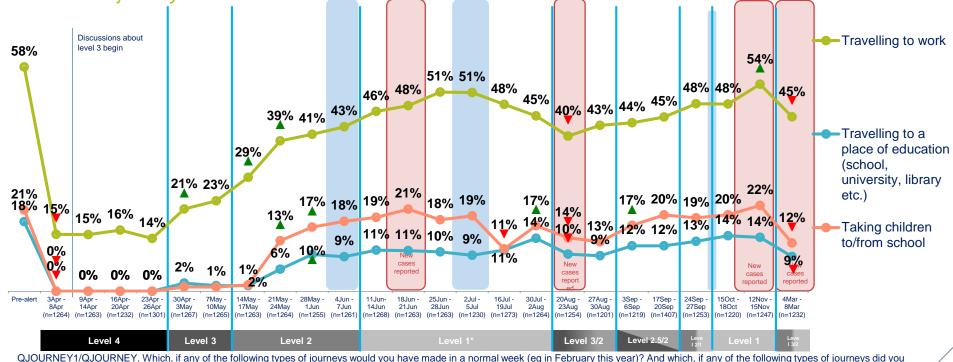
### Waka Kotahi objective - how is travel changing?

- 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.
- Compared to the last wave of measurement in November, all essential daily journeys like travel to work or school saw a significant decline.
- However, work journeys occurred at a higher rate than during the last comparable lockdown in August 2020. This could have be partly influenced by the fact that lockdown began on Sunday morning in Auckland and it may have required more people to make at least one visit to their workplace to retrieve equipment to work from home or fewer people working from home during this period.
- Weekly essential journeys like shopping did decline to a level similar to August 2020, suggesting that in the brief lockdowns we're experiencing these types of journeys can be more easily sacrificed for a week, just as with non-essential journeys which also followed a similar pattern.
- Despite the decrease in weekly grocery shopping trips there was no measurable gain for online grocery shopping orders.





The change in alert levels brought a significant decrease in most daily essential journeys, although work journeys were five points higher than the August lockdown *Essential journeys* 



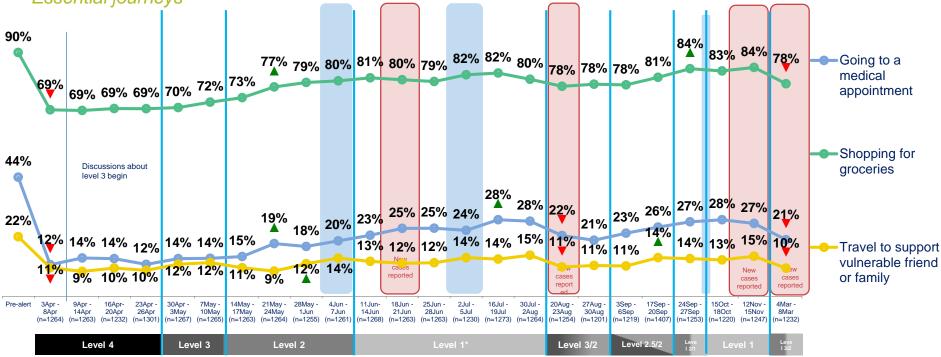
make during the last seven days?

Base:all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 - 24 (n= between 1,230 - 1,407)

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

Less frequent essential journeys also saw a statistically significant drop with alert levels raised, roughly matching changes in the comparable August lockdown *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?

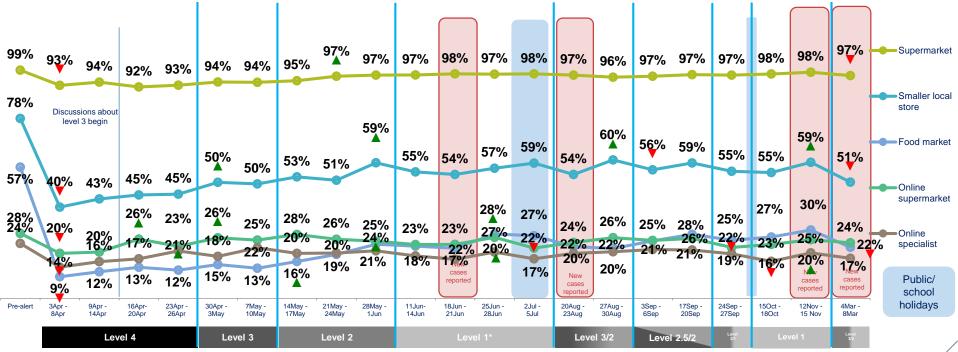
Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 - 24 (n= between 1,230 - 1,407)

WAKA KOTAHI

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

While weekly grocery shops fell, this impacted all types and there was not a clear shift towards online shopping from those who would've visited physical spaces Access to commerce



QSH2: 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 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 24 (n= between 1,230 – 1,407)

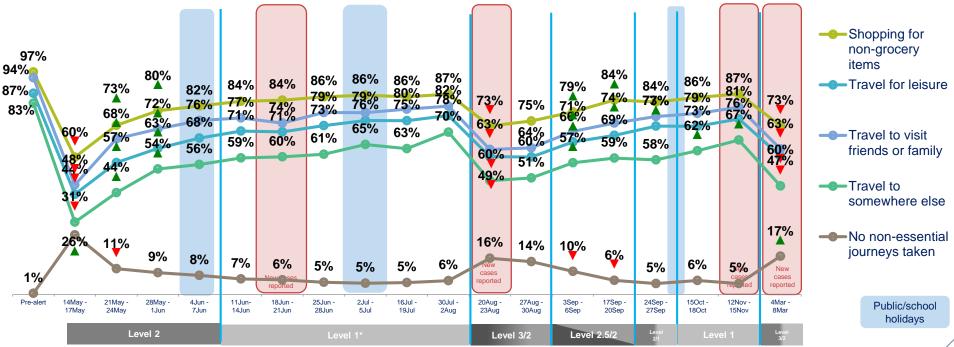


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## A similar pattern can be seen with non-essential journeys, with each falling significantly to a similar level to that seen in August

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)

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

### Section 6 – Modal changes

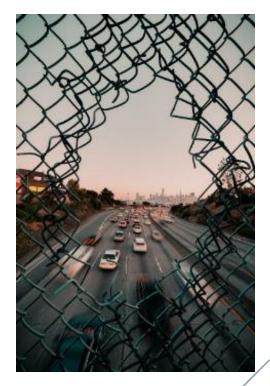




## Key findings – modal changes

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

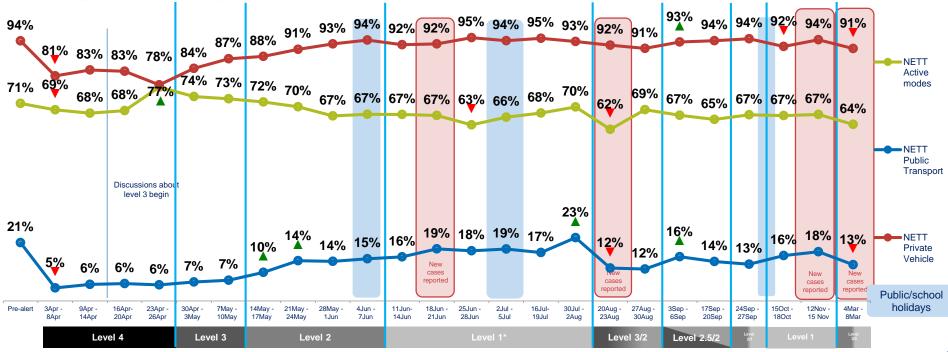
- Within the context of COVID-19 and changing travel restrictions it is important to understand how the transportation modes that New Zealanders are choosing have changed in response to this and which parts of the transport network are most impacted by these changes.
- At the national level, there has been a decrease in stated weekly usage for all modes, which was statistically significant in the case of private vehicles and public transport.
- Within Auckland, where lockdown restrictions were more extensive all modes experienced significant decline, with active mode travel at the lowest level recorded in the city so far, but most likely due to unfavourable weather conditions.
- Patterns in public transport changes were comparable to the split level lockdown in August 2020, with all modes seeing statistically significant declines to reach similar rates of weekly usage both within Auckland and nationally.
- Perhaps anticipating a shorter lockdown period, consideration of public transport trended in a different direction to actual transport usage and to patterns seen in previous lockdowns, with a quarter saying they would consider using buses, trains or ferries next week.
- Reduced needs were the most prominent barriers to using public transport and transmission concerns did not increase with the new lockdown, suggesting greater confidence around transmission risks on public transport.





At a national level, public transport modes were once more the most affected area of the transportation network, with stated weekly usage down five points

Changes in mode usage by wave – national



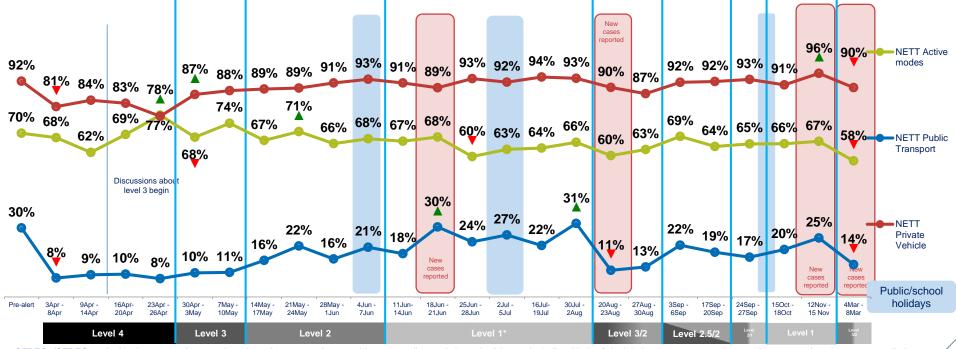
QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 24 (n= between 1,230 – 1,407)

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With Auckland in level 3 stated weekly travel was down more than 10 points on public transport but active mode travel was also at the lowest level recorded so far *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?

Base: all adults 15+ in Auckland in Benchmark (n=1,252), in waves 1-24 (n=c.331 per wave)

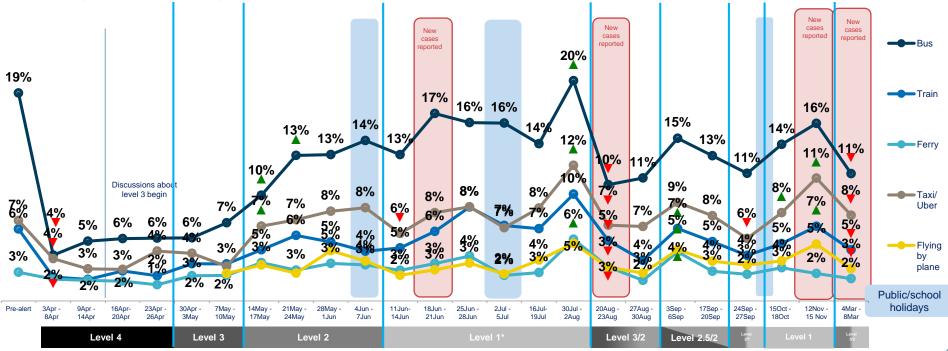
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# All public transport modes were impacted, with stated weekly usage of each similar to that recorded during the August lockdown

Changes in mode usage by wave - national



QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

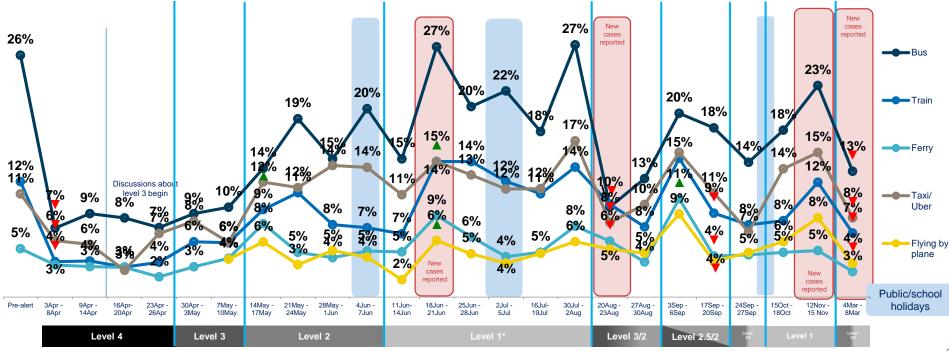
Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 24 (n= between 1,230 – 1,407)

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# In Auckland, weekly bus, train and ferry usage all declined to levels similar to the previous comparable lockdown in August 2020

Changes in mode usage by wave – Auckland



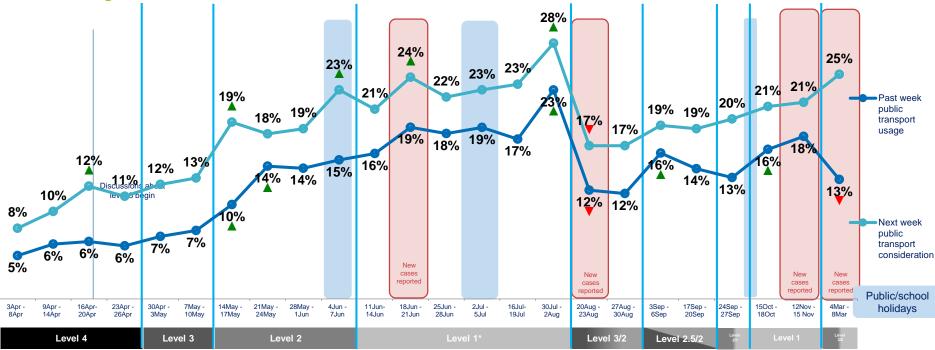
QFREQ1/QFREQ2 – And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?

Base: all adults 15+ in Auckland in Benchmark (n=1,252), in waves 1-24 (n=c.331 per wave)

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Public transport consideration does not seem to have been negatively affected by the change in alert levels during this lockdown and is up 4 points nationally *Mode usage vs likelihood to use* 



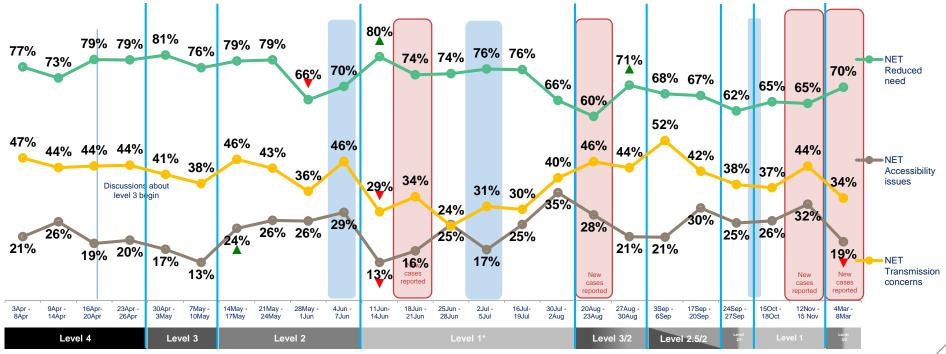
QFREQ2 – And during the past seven days, on how many days have you travelled via each of the modes listed below? QPT2 - If available next week, which if any of the following would you be likely to use? Base: all adults 15+ in New Zealand (n= between 1,230 – 1,407 per wave)



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

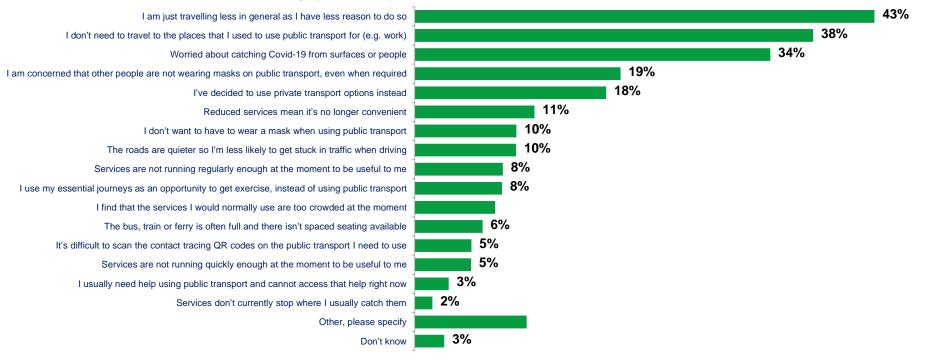
Transmission concerns were a less prominent barrier in the new lockdown when compared to November, with directional growth in reduced need reasons *Reasons for decrease in PT activity* 



QDEC - For which, if any of the following reasons, has your use of public transport decreased? Base: decreasing PT usage in past week; current alert level: level 1 (2<sup>nd</sup>)



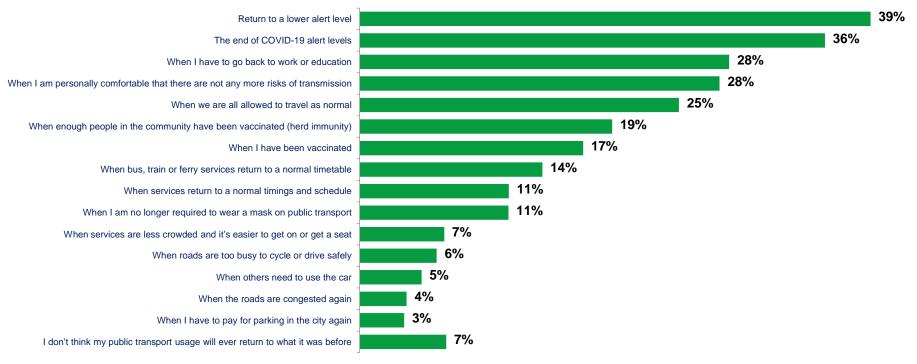
# While the top barriers relate to a reduced need, one in five express concern about others not wearing masks as required and a third are explicitly worried about transmission *Reasons for decrease in PT activity (wave 24)*



For which, if any of the following reasons, has your use of public transport decreased? Base: decreasing PT usage in past week (n=211)



# The big triggers for returning to normal public transport usage are less about services returning to normal and more about a formal end to COVID restrictions *Triggers for return to PT activity (wave 24)*



Which, if any of the following would encourage you to start using public transport as much as you used to? Base: decreasing PT usage in past week (n=211)



### Section 7 – Working from home





## Key findings – working from home

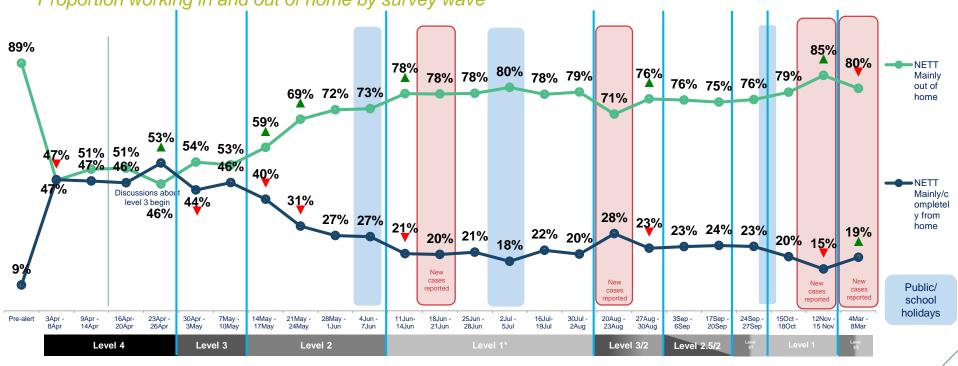
Waka Kotahi objective - understanding behaviour change

- 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.
- When comparing this split level lockdown with the comparable conditions of August 2020, the proportions working from home were much closer to the second week of the August lockdown.
- This was the case both at a national level and within Auckland and suggests that businesses were better prepared to keep staff on site following successive short lockdowns in the city.
- As has consistently been the case, increases in population working from home disproportionately impacts public transport commuting.





While the proportion working from home increased significantly this week, the proportion doing so was 9 points lower than in the comparable lockdown of August *Proportion working in and out of home by survey wave* 



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

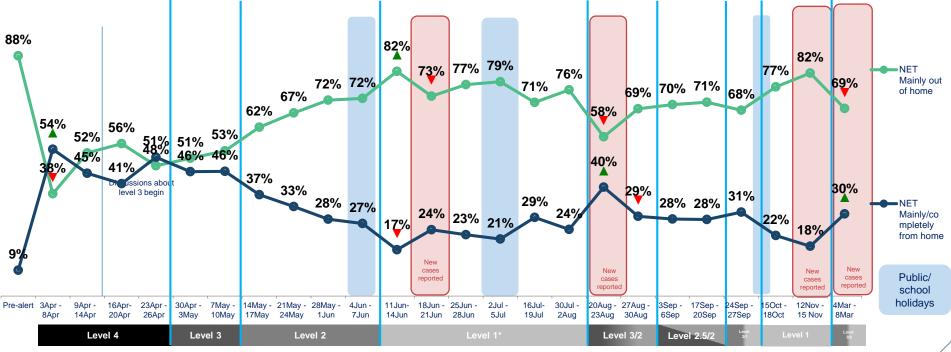


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Indicates a statistically significant increase from previous time period Indicates a statistically significant decrease from previous time period

Auckland saw a more pronounced swing than the national average, but this was still 10 points lower than the first week under level 3 conditions in August

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

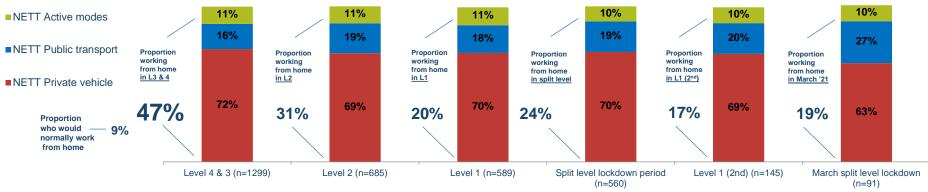


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Indicates a statistically significant increase from previous time period Indicates a statistically significant decrease from previous time period

### As has often been the case, public transport is most impacted by the increase in commuters

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



#### Proportion of each commuter type working from home

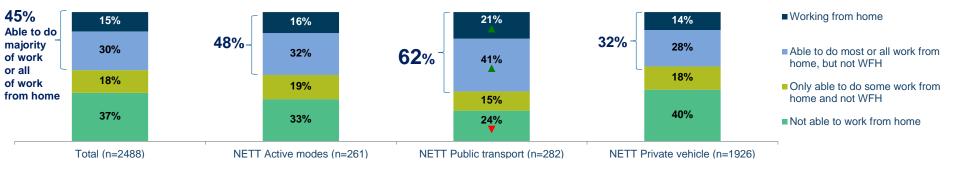
Proportion WFH by level	47%	31%	20%	24%	17%	19%
Within active mode commuters	53%	31% 🔻	17% 🔻	18%	12%	15%
Within private vehicle commuters	43%	25% 🔻	13% 🔻	16% 🔺	11% 🔻	13%
Within public transport commuters	62%	42% 🔻	24% 🔻	36% 🔺	19% 🔻	29%

QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you currently work? By QMODE1 1 How would you normally make each of the following types of journeys listed below? - travelling to work

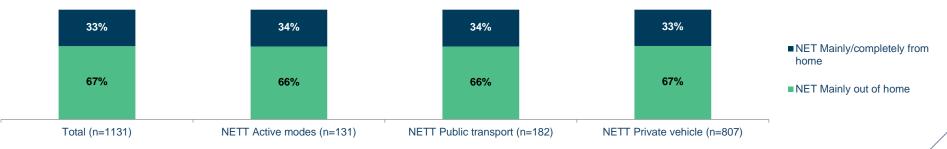
Base: all adults 15+ in New Zealand who normally commute by Active modes in L4&3 (n=292)/L2 (n=256)/L1 (n=402)/split level (n=324) 2<sup>nd</sup> L1 (n=141)/ March (n=69\*) | Private vehicle L4&3 (1,748)/L2 (n=2.916)/split (n=2.390)/ 2<sup>nd</sup> L1 (n=895)/March (n=464)| Public transport L4&3 (n=323)/L2(n=295)/L1(n=436)/split(n=314)/ 2<sup>nd</sup> L1 (n=152)/March (n=845)) \* low base, interpret with caution



Data from June & July suggests that the disproportionate impact on PT and active mode commuting is caused by greater feasibility, with no difference in choice *WFH feasibility by normal commute mode* 



### WFH among those able to do so by normal commute mode



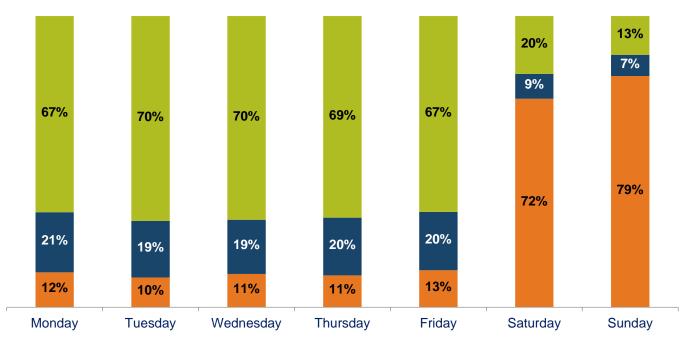
QWORK2A/QWORK2D And where do you currently work? Which, if any of the following applies to your job? Base: all working adults 15+ in New Zealand interviewed in waves 13-16 who would normally commute via each mode, of those, all able to work from home.

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Indicates higher than total to a statistically significant extent Indicates lower than total to a statistically significant extent

Patterns of working from home reflect a relatively even distribution across the most recent week, with commuter traffic not larger to a significant extent on any week day

#### Current work arrangements



I currently travel to work on this day
I currently work from home on this day
I do not currently work on this day

QWORK2ENEW: Thinking about the last week, for each day, please state your current work arrangements All currently working (n=705)



