Waka Kotahi COVID-19 transport impact

Fieldwork waves 1-25 core report

31 May 2021

WAKA KOTAHI
NZ TRANSPORT AGENCY

New Zealand Government

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.

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

1) Regular* overview power point report
   - benchmark and longitudinal summary of key data points
   - including extra analysis based on topical questions.

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

*For waves 1-14 fieldwork and reporting was undertaken weekly, for waves 15 and 16 fieldwork and reporting was undertaken bi-weekly, while wave 17 fieldwork and reporting was undertaken 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. Wave 22 took place three weeks after wave 21. Waves 23, 25 and 25 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 25 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 25 report is based on a statistically significant shift of results between waves 1 to 25, 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	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)
22	Thursday 15th October to Sunday 18th October	Alert level 1
23	Thursday 12th November to Sunday 15th November	
24	Thursday 4th March to Monday 8th March*	Alert Level 3 (AKL) Alert Level 2 (Rest of NZ)
25	Thursday 20th May to Monday 24th May	Alert level 1

*Please note: During the fieldwork period, on the 7th 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		Wave 25	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*	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	n= 1,220	2.81	n= 1,247	2.77	n= 1,232	2.79	n= 1,259	2.76
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	n=331	5.56
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	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	n=101	9.75	n=100	9.8	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	n=194	7.04
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	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	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	n=334	5.36
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	n=187	7.17
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	n=311	5.56
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	n=133	8.5

*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 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.

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.

7 October **Auckland moved to alert level 1 at midday to match rest of New Zealand**

12 November
Single community transmission case reported in Auckland, with Auckland CBD workers urged to work from home. These conditions are lifted the following day. Reported community outbreak 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.

22 March
Announcement of New Zealand and Australia travel bubble

6 April
Commencement of New Zealand and Australia travel bubble

3 May
Announcement of New Zealand and Cook Islands travel bubble

17 May
Commencement of New Zealand and Cook Islands travel bubble

Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1-25

Waka Kotahi COVID-19 transport impact tracker

Wave 25 of fieldwork took place after a sustained period of almost three months in alert level 1, with no community transmission cases since the March lockdown.

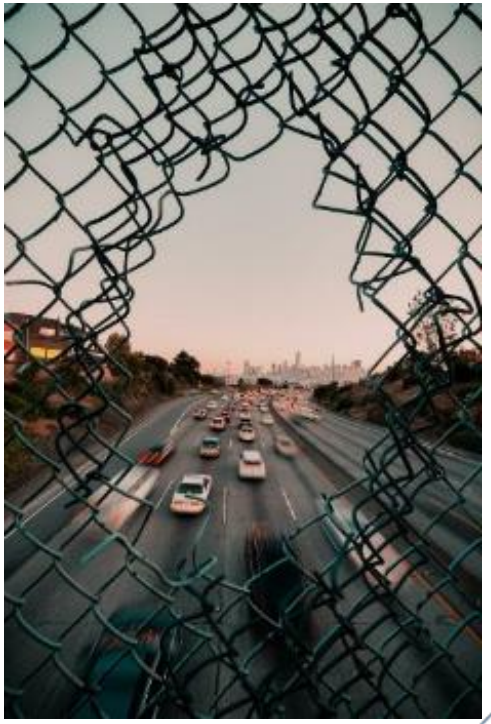
- Although concerns about transmission, infection and further cluster outbreaks in New Zealand dropped significantly, worries remain high, with two thirds reporting concern.
- Despite continuing wariness about outbreak risk, New Zealanders are indicating that their world is returning to normal.
  - Only 8% say their daily travel is disrupted, two thirds agree that they can easily get where they need to go, and the majority agree that that their travel routines are no different to pre-COVID patterns.
  - There are some indications of accompanying complacency: the proportion agreeing that others are following guidelines on self-isolation is at the lowest level recorded, and seven in 10 are concerned that people have stopped seeing COVID-19 as a threat and are not following guidelines (although this is down from eight in 10 in March)
  - Rates of self-isolation are now at the lowest levels recorded, with only 3% of people saying they are completely self-isolating and almost half saying that they are moving around as they normally would.
- All essential daily journeys, such as travelling to work, are occurring at increased frequency when compared with the March lockdown.
  - However, work journeys remain six points below the stated pre-lockdown incidence, and this may indicate residual or long term change in some travel behaviours.
  - Even non-essential journeys, like non-grocery shopping and leisure trips, seem to be occurring much more than they have been during previous waves of research.
- In spite of the changing seasons, New Zealanders appear to be making more effort to get active. Running, walking and cycling for leisure and fitness are at the highest levels recorded in a year and active mode travel also saw significant growth, with almost seven in 10 choosing to walk for more than 10 minutes on at least one journey even as the nation enters into winter.
- May 2021 saw the highest stated volume of public transport network users since August 2020, with growth in all mass transit modes and stated weekly train, ferry and taxi usage apparently occurring at higher rates than would've been seen before the outbreak of COVID-19.
  - Not all public transport users have fully returned to the network. While most are experiencing less need, some are waiting for the rollout of vaccinations before they return to buses, trains and ferries.
  - Masks and face coverings on PT do not appear to be a significant barrier. Indeed, a quarter say they are more likely to use PT because of masks, compared to 13% who are less likely
- The public transport network is still more impacted by people working from home compared to other modes, and even though the proportion working from home is now at the lowest level so far recorded, it is still five points higher than it would have been before the outbreak of COVID-19
  - Public transport commuters are more likely to have the ability to work from home, rather than simply being more eager to do so.
  - Public transport and active mode commuters are a lot more likely to say that their workplace has made it easier for them to work from home and more likely to agree that they could make a good case to their employer for doing so.
  - This overlaps with significant support for working from home among CBD-based workers, suggesting that any sustained impact of working from home changes will be concentrated on some forms of public transport and active mode commuting.

Section 3 – Context

Key findings – context

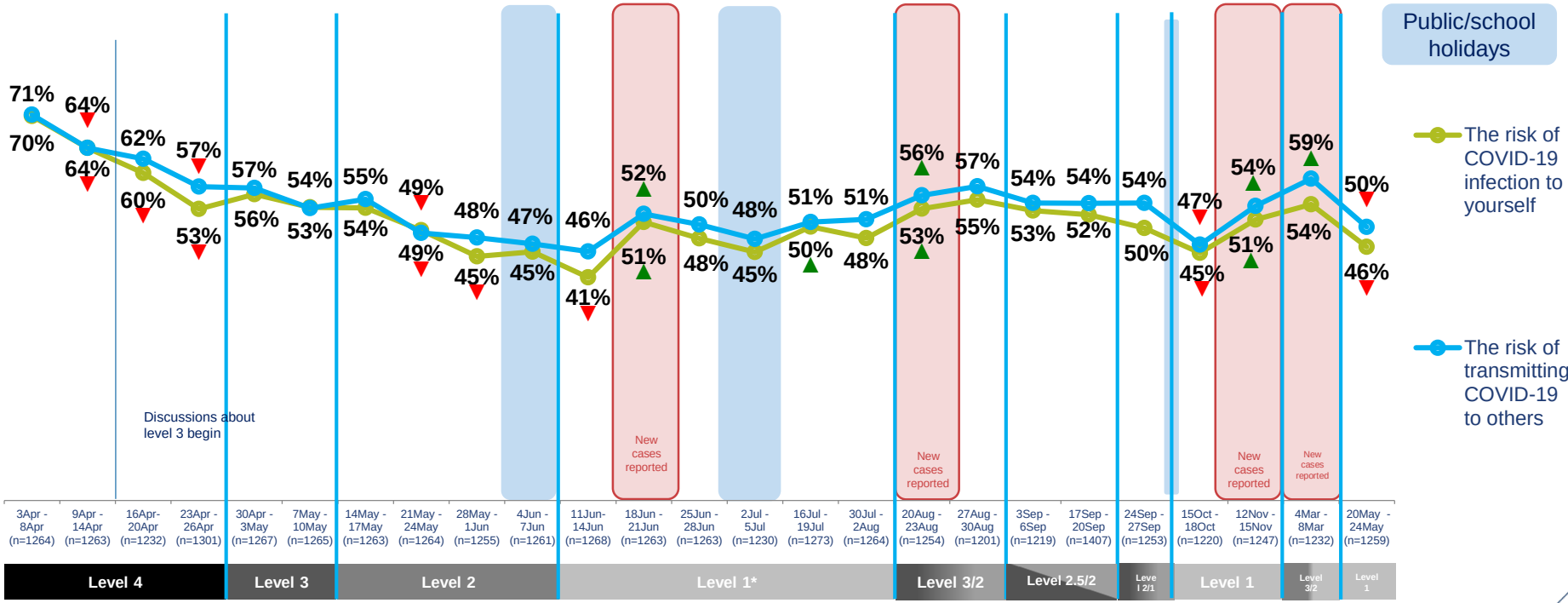
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- Understanding attitudes around COVID-19 provides the context in which journey and mode changes can be viewed. General fears and attitudes may work as external factors influencing the choices that New Zealanders make.
- The latest wave of fieldwork took place after a sustained period at alert level 1, with no reported cases of community transmission in the country.
- While explicit concern about transmission and infection dropped significantly, it is still five points above the low level reached when New Zealand first transitioned to alert level 1 in June 2020, which suggests some residual caution as a result of the subsequent lockdowns.
- Two thirds express concern about the risk of another cluster outbreak, but this is a significant 13 point drop since the last lockdown.
- There is also less stated concern about the complacency of others, although 70% indicate that they are at least somewhat concerned about this (down from 83% in March). Meanwhile the proportion agreeing that others are following guidelines on self isolation is at the lowest level recorded.
- New Zealanders are indicating that their world is returning to normal. Only 8% say their daily travel is disrupted, two thirds agree that they can easily get where they need to go, and the majority agree that that their travel routines are no different to pre-COVID patterns.
- For some, the rollout of vaccinations will be the key difference maker, with over two in five agreeing that they won't travel as much until high rates of vaccination are achieved. Particularly impacted are those with disabilities, more than half of whom agree.
- Vaccines will also make a big difference for public transport – half of people say they'd be more confident about using public transport with increased vaccination.
- Finally, with the opening of travel bubbles, there is some openness to overseas travel, although the fact that only one in 10 *strongly* agree that they are planning an overseas trip soon suggests that there is still some caution around making these sorts of plans.



Nationally, concerns about infection transmission have decreased significantly, but are not yet as low as in the first level 1 period during 2020

COVID-19 concerns (NETT all concerned)

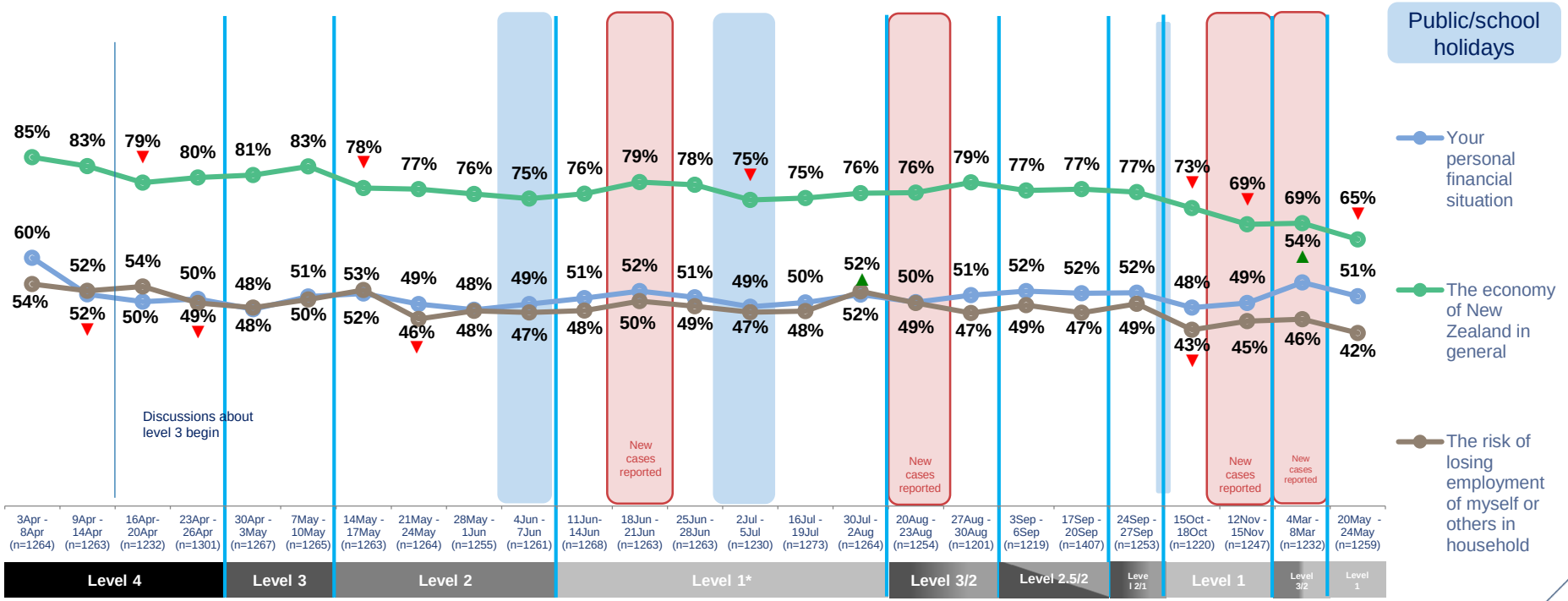


QPTUSE3. How personally concerned are you about each of the following?

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

While concerns about personal finances spiked in the last lockdown, they have reverted to previously stable levels, concern about the economy continues to drop

Economic concerns (NETT all concerned)

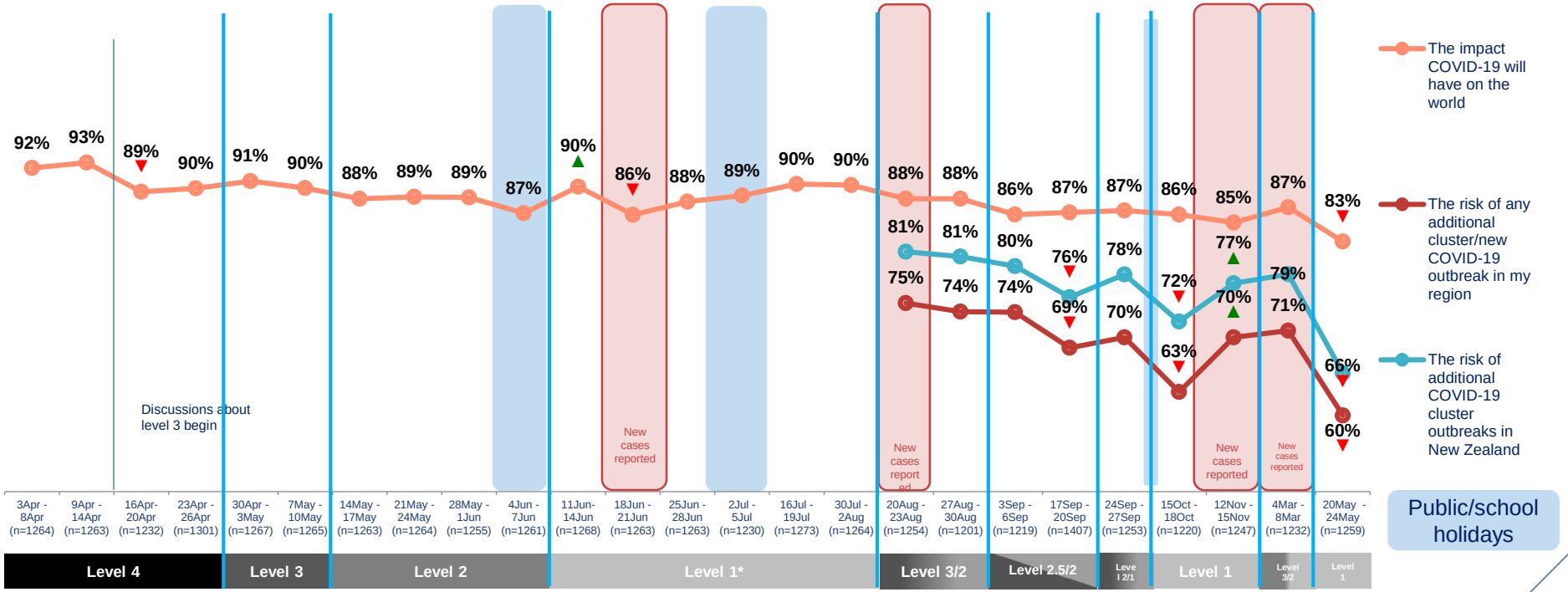


QPTUSE3. How personally concerned are you about each of the following?

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

General stated concern about new outbreaks, globally, locally and nationally, are at lowest level recorded, with latter two dropping at least 10 points since March

COVID-19 concerns (NETT all concerned)

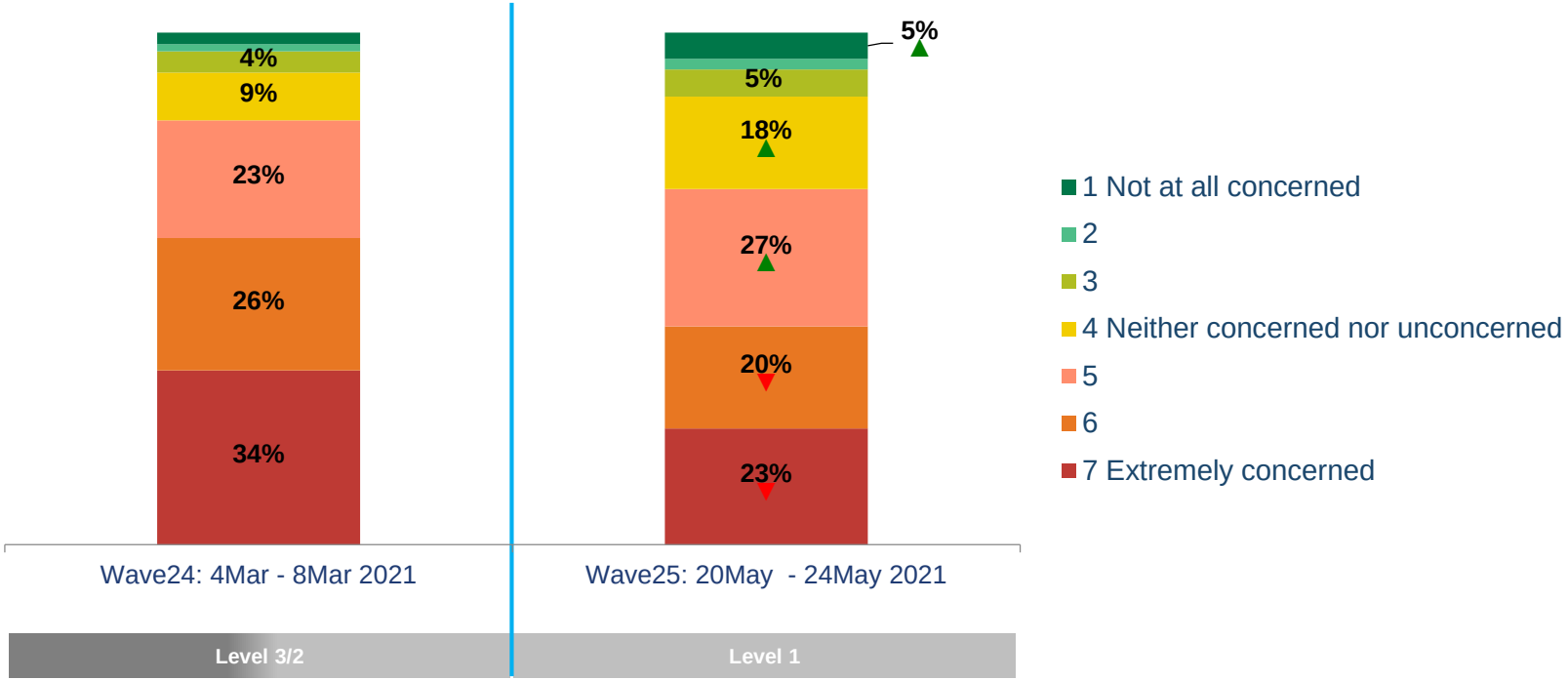


QPTUSE3. How personally concerned are you about each of the following?

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

There has also been a statistically significant decline in the proportion concerned about others not adhering to guidelines, but the majority express *some* concern

People have stopped seeing COVID-19 as a threat and are not following guidelines

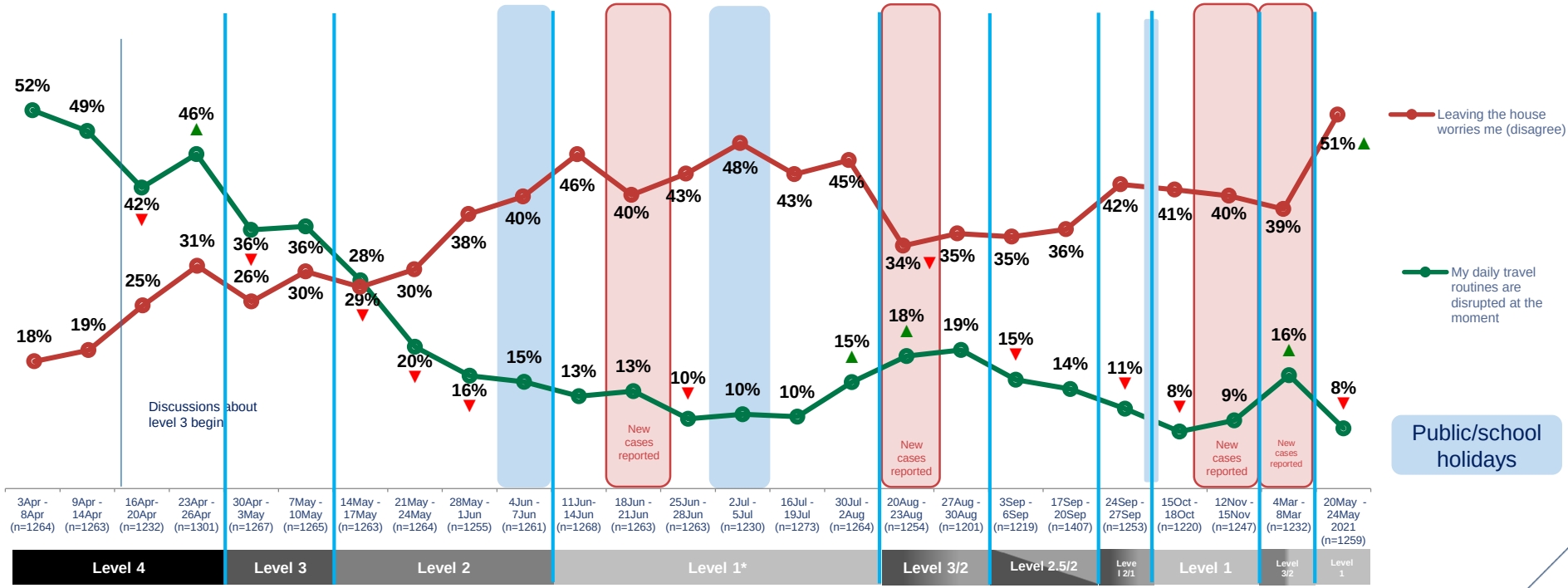


QPTUSE3. How personally concerned are you about each of the following?

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

Only 8% agree that their travel routines are disrupted, the joint lowest recorded, while those who are not worried about leaving the house is greater than half for the 1st time

COVID-19 attitudes (NETT all who agree or disagree)

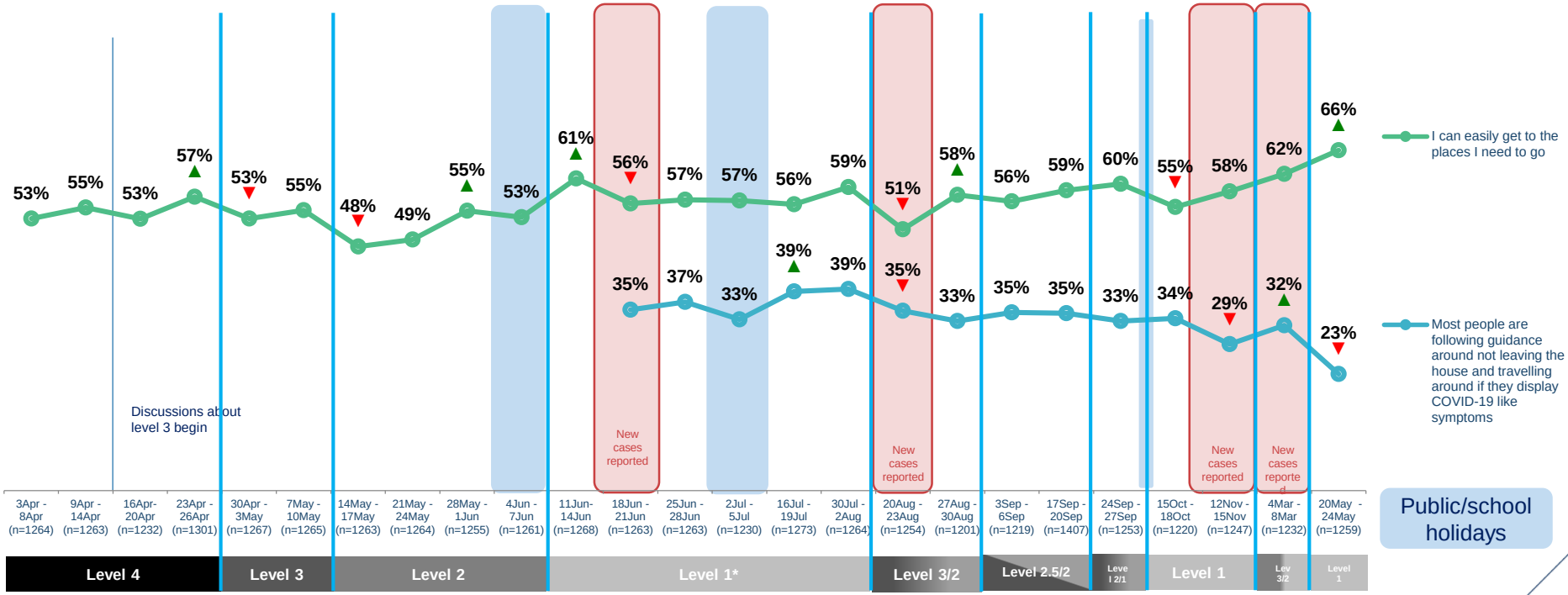


QATT. To what extent do you agree or disagree with the following statements?

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

After a brief bounce during the last lockdown, perceived adherence among others has dropped significantly again, with the majority now also comfortable getting around

COVID-19 attitudes (NETT all who agree)



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*

The majority of people feel that their travel routines are no different to pre-COVID patterns, although still over a quarter feel it has changed to some degree

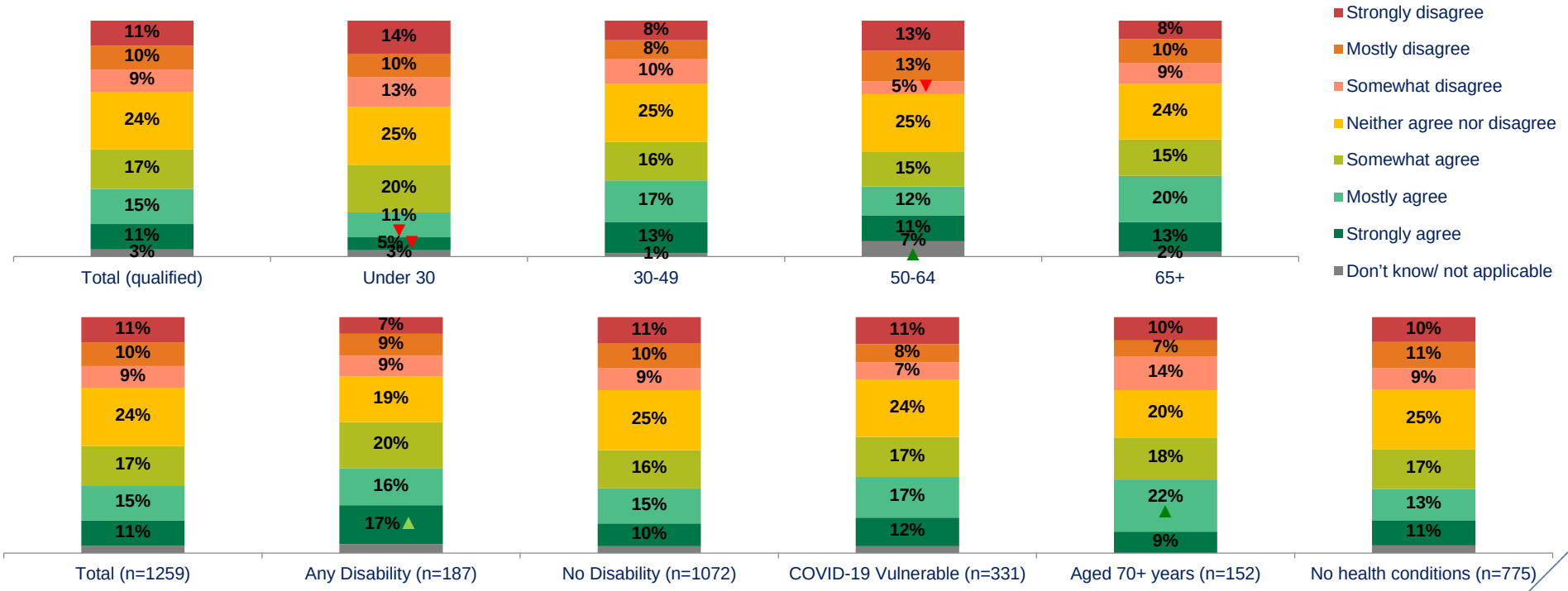
My regular travel routines now are no different to what they were before the COVID-19 pandemic

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*

Just over four in 10 people feel they won't travel as much until high rates of vaccination are achieved, with more than half of people with any disability feeling the same

I don't think I will travel as much as I used to until most people in New Zealand are vaccinated against COVID-19

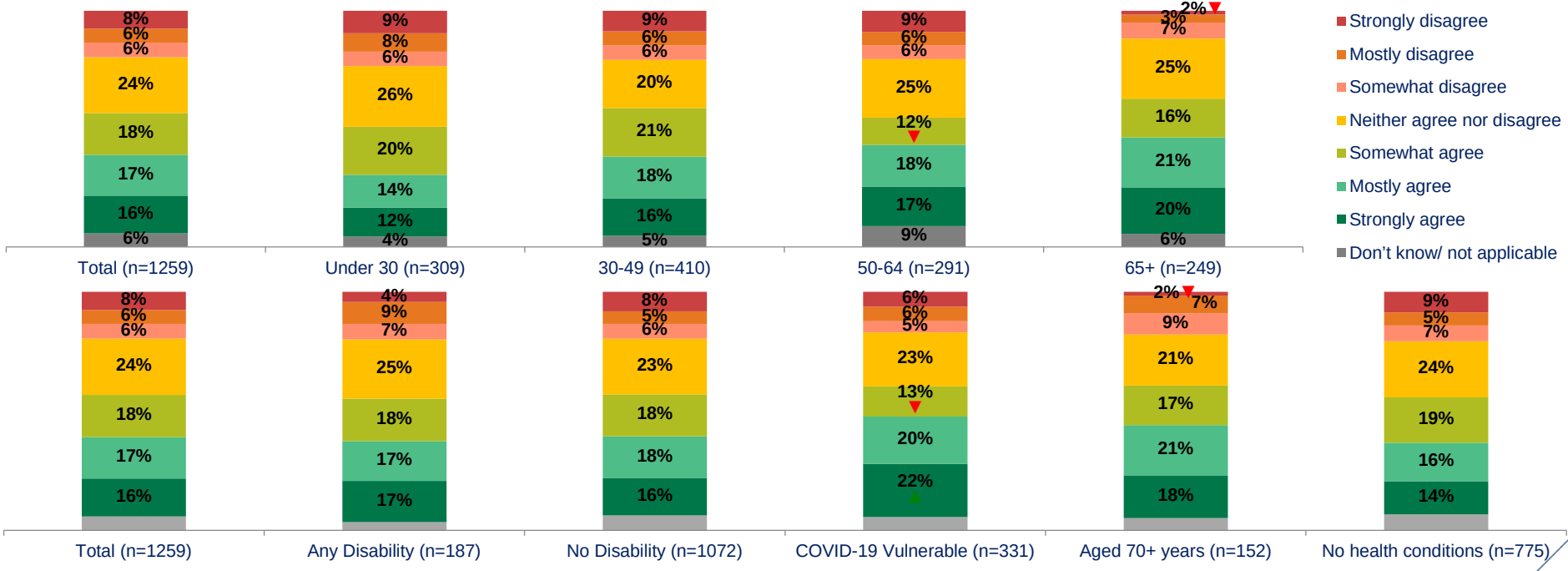


QATT. To what extent do you agree or disagree with the following statements?

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

Over half of people would feel more confident about using public transport with increased vaccination, with this directionally higher among COVID-19 vulnerable

I would feel more confident about using public transport if most people in New Zealand were vaccinated against COVID-19

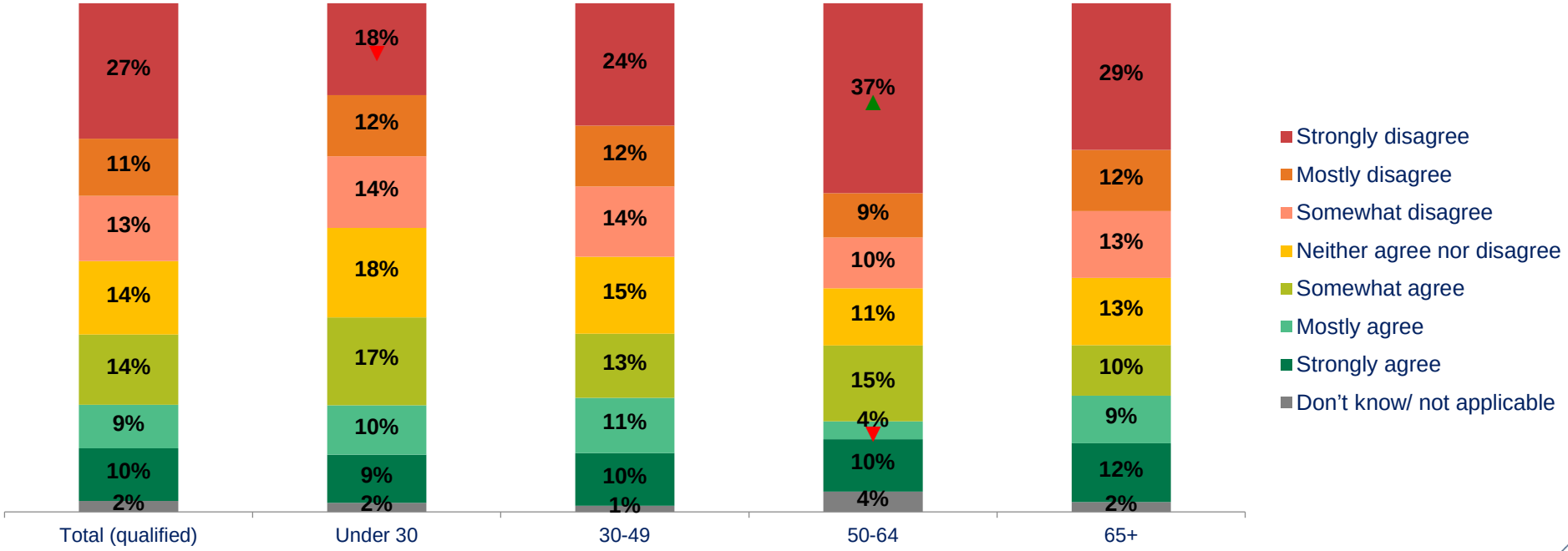


QATT. To what extent do you agree or disagree with the following statements?

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

One in 10 New Zealanders strongly agree they will take an overseas trip as soon as possible, while a quarter strongly disagree; those aged 50-64 more likely to disagree

I intend to take a trip overseas as soon as it is possible to fly internationally



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

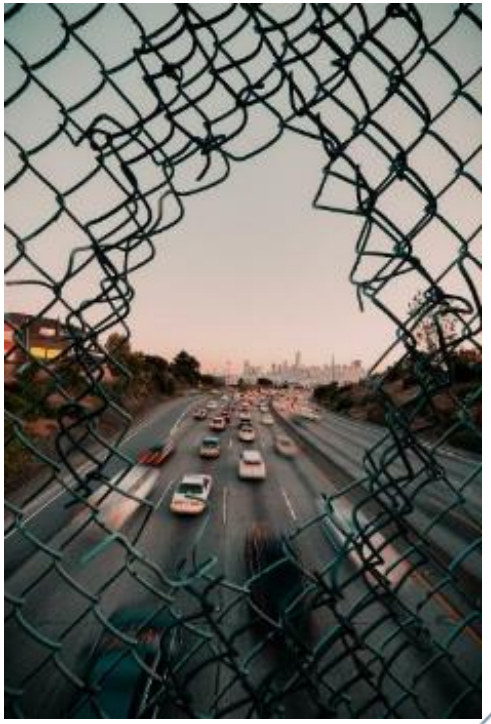
*Base:all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1, statement suppressed for most waves during this time period*

Section 4 – Behaviours

Key findings – behaviours

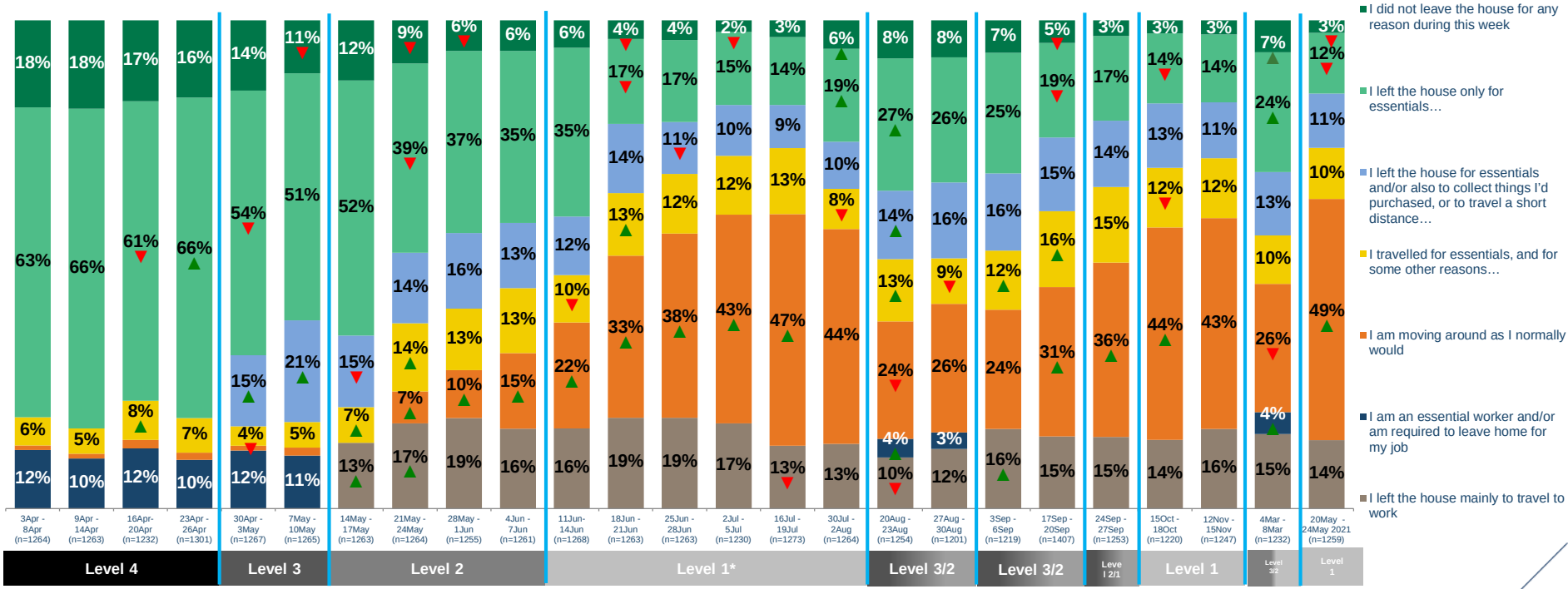
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- In light of changing attitudes and concerns around COVID-19 in the country, New Zealanders may change their behaviour in different ways to adapt to their situation. This includes moderating the amount of weekly travel undertaken or taking certain steps to protect oneself in transit, such as wearing masks.
- After two months under alert level 1 conditions, rates of self-isolation are now at the lowest levels recorded, with only 3% of people saying they are completely self-isolating and almost half saying that they are moving around as they normally would.
- The regional variation caused by the Auckland outbreak in March has disappeared, with only a one percentage point difference between the city and the national average.



Rates of self-isolation are now at the lowest levels recorded, with only 3% remaining at home all week and close to half saying they're moving around as normal

Isolation – travel behaviour

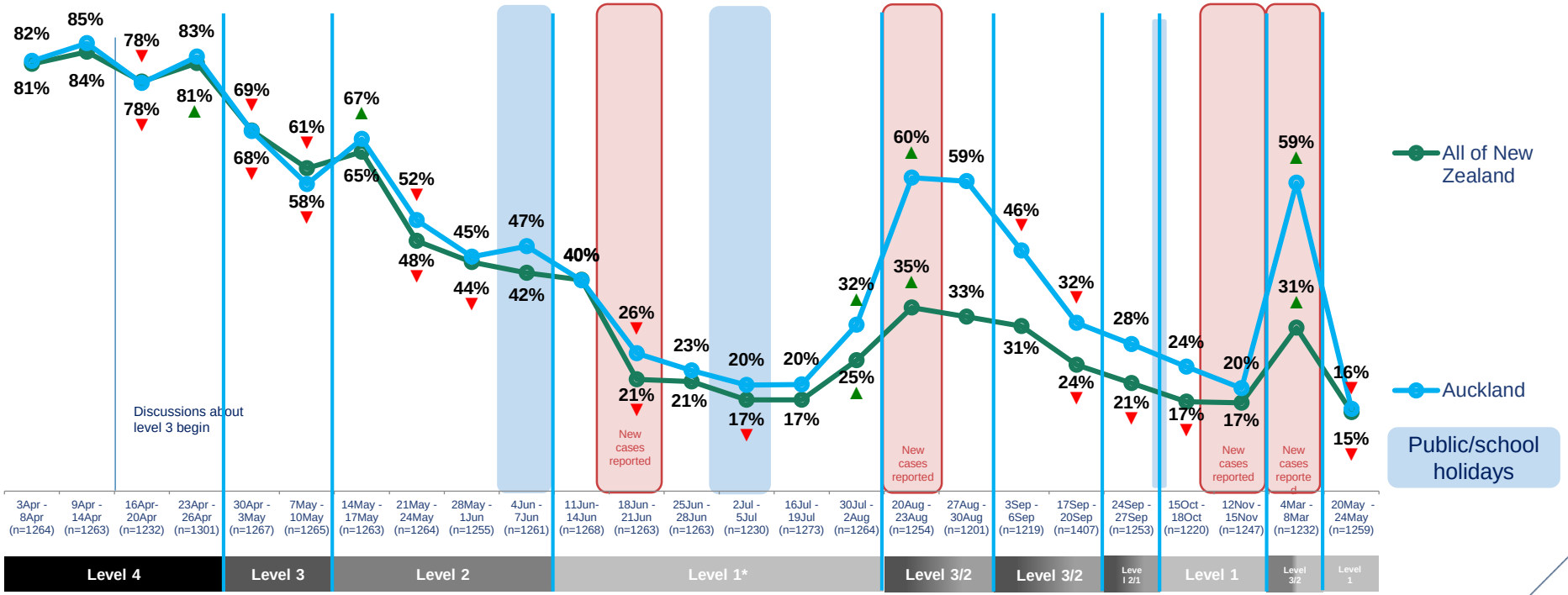


ISO_1_TRAVEL Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

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

Auckland, site of the most recent lockdown, has seen rates of self-isolation return to match with the national average

Self-isolation over time



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

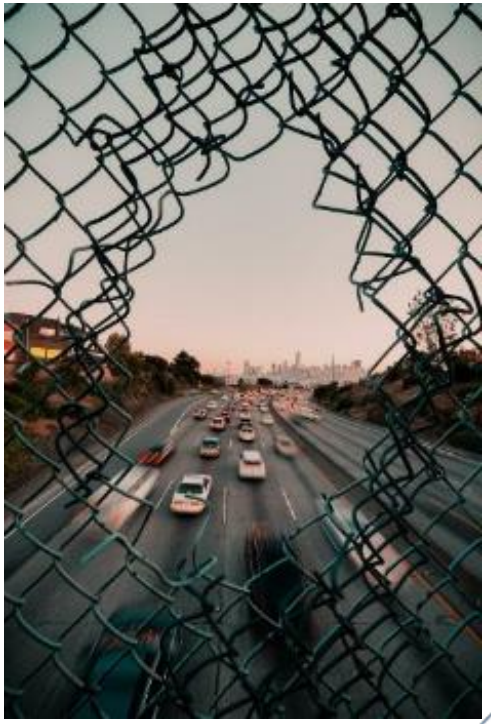
*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during level 1*

Section 5 – Local and domestic journeys

Key findings – local and domestic journeys

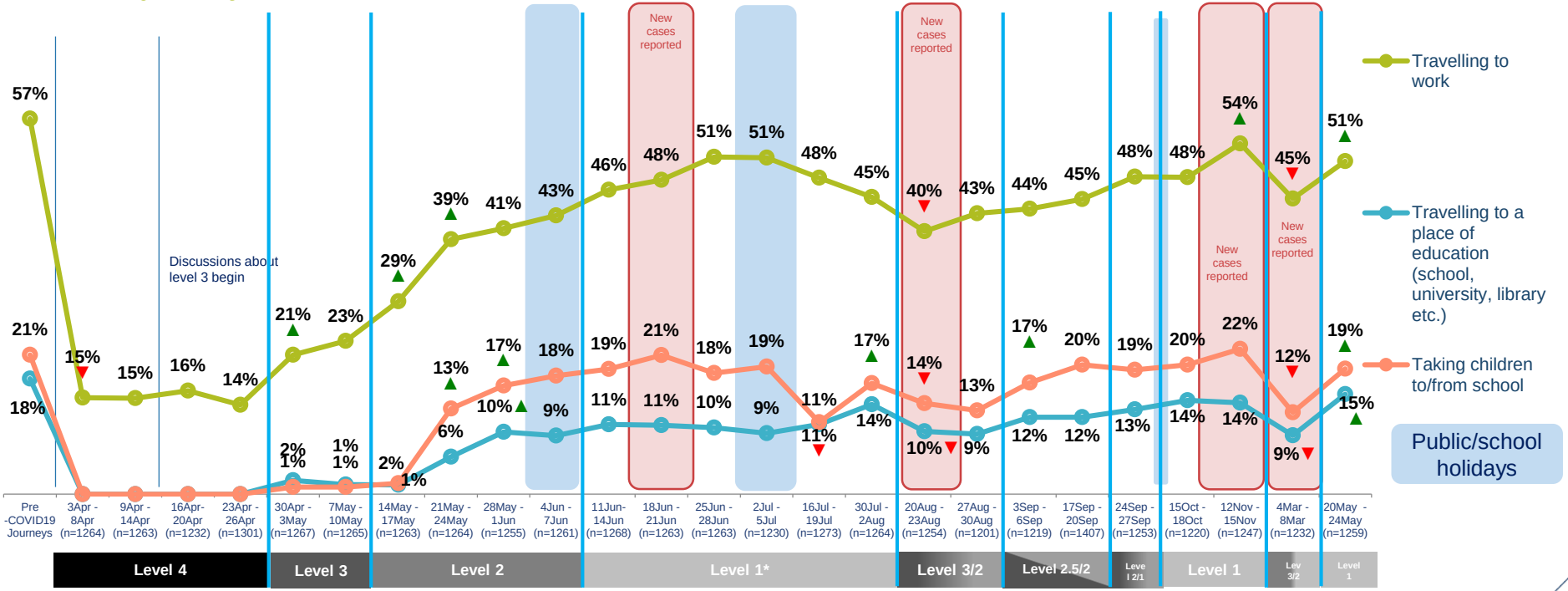
Waka Kotahi objective – how is travel changing?

- 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.
- After a sustained period with no lockdown escalations, all essential daily journeys like travel to work or school rebounded from their March lows. However, work journeys remain six points below the stated pre-lockdown incidence, indicative of a permanent (or at least continuing) change in commuting patterns.
- Weekly medical visits occurred at the highest rate recorded, likely an impact of vaccination appointments (both for COVID-19 and for seasonal flu vaccinations) which took place during this time.
- Leisure and fitness journeys also increased between March and May, in spite of encroaching winter weather.
- Beyond daily and essential journeys, New Zealanders indicated that they are moving around more in general, with non-grocery shopping, leisure and social trips all at the highest levels recorded to date.



Once again, all daily journeys have recovered after lockdown, but none have quite yet recovered to match the stated pre-lockdown incidence

Current journeys

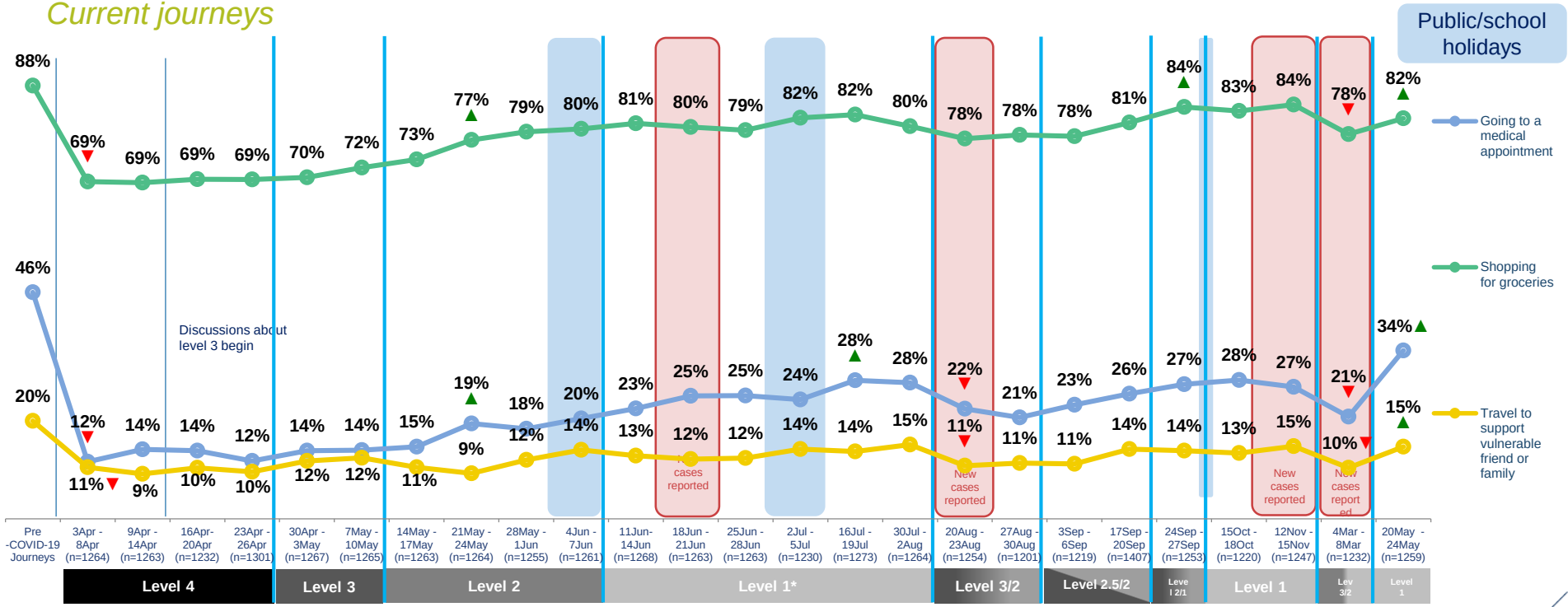


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

Base:all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 25 (n= between 1,230 – 1,407)

The significant increase in medical appointment visits during this wave is likely reflective of some vaccine appointments occurring during fieldwork

Current journeys

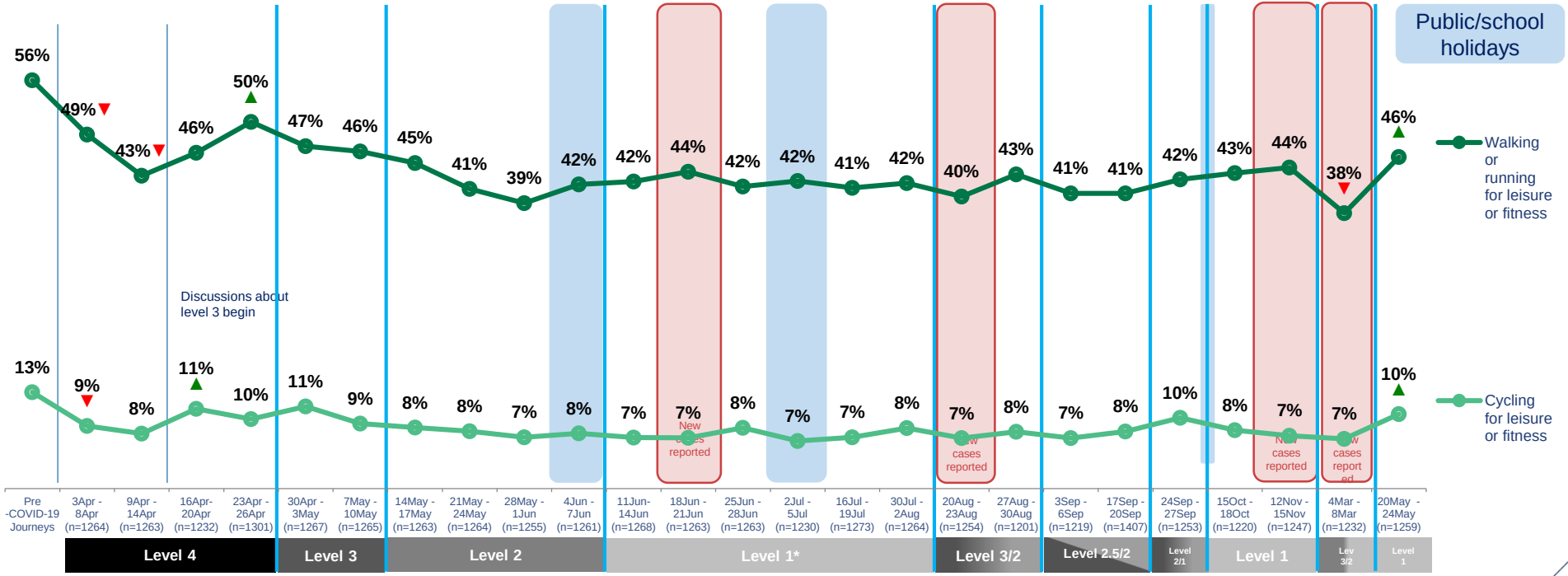


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

Base:all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 25 (n= between 1,230 – 1,407)

The previous lockdown period saw a notable decline in walking and running for exercise, but this has recovered in spite of less favorable seasonal conditions

Current journeys

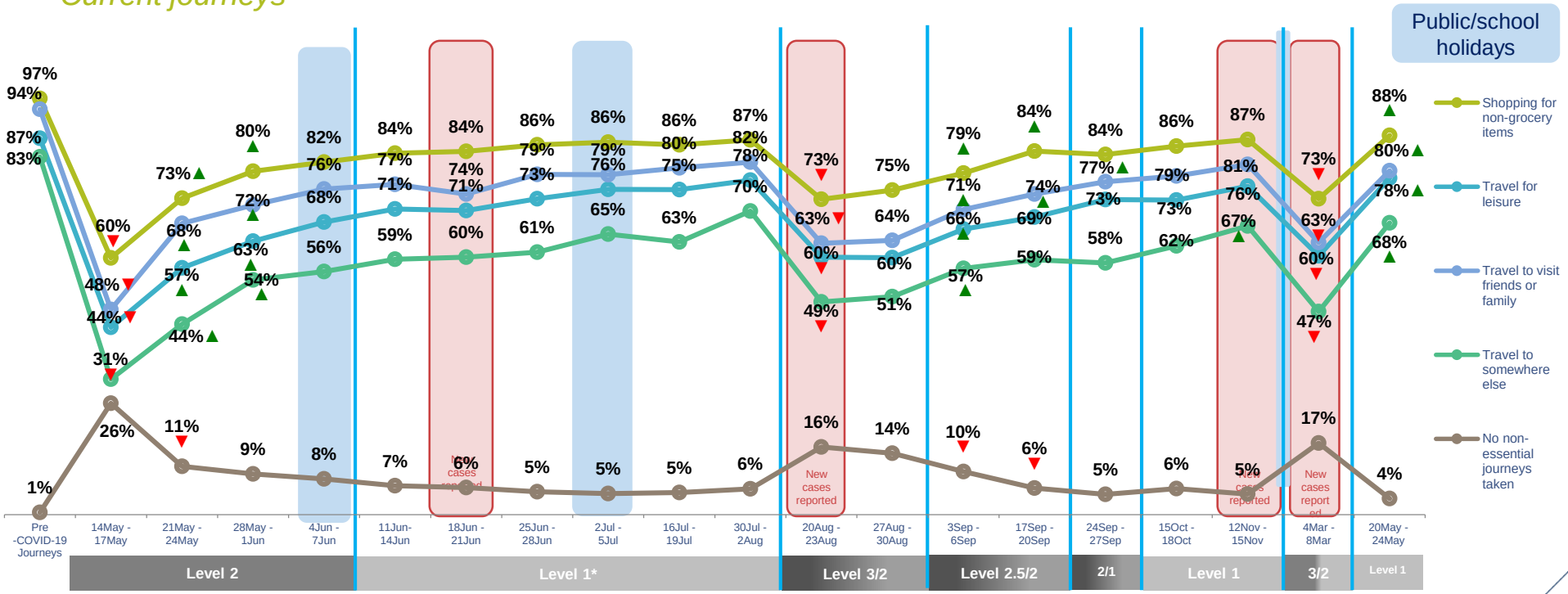


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days?

Base:all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 25 (n= between 1,230 – 1,407)

The sustained period at alert level 1 has seen non-essential journeys increase as well, with leisure and shopping trips occurring at the highest rates recorded so far

Current 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?

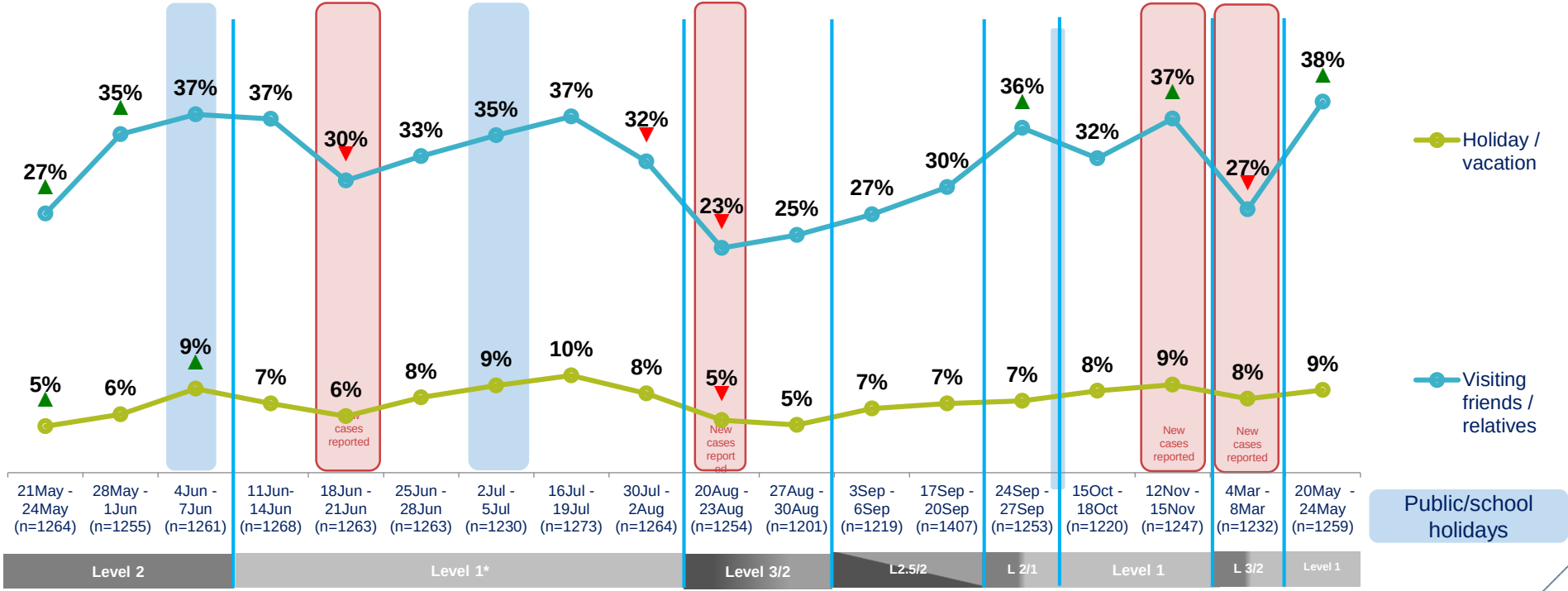
Base: all adults 15+ interviewed since initial alert level 2 in New Zealand (c. 1,200 per wave)

▲ Indicates a statistically significant increase from previous time period

▼ Indicates a statistically significant decrease from previous time period

Visits to friends and relatives during the past week recovered to rates normally seen at lower alert levels

Domestic journeys past seven days

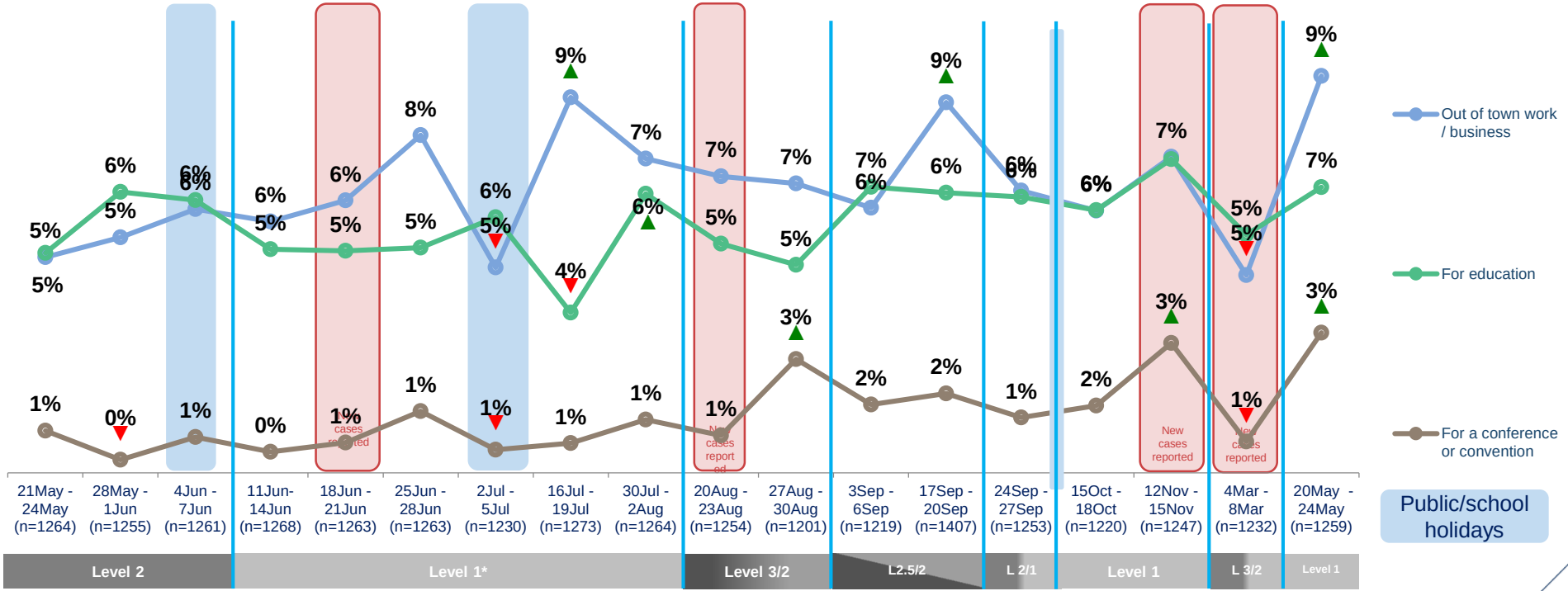


QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ interviewed since alert level 3 in New Zealand (c. 1,200 per wave)

Other domestic journeys have also recovered to levels seen prior in September

Domestic journeys past seven days



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?

Base: all adults 15+ interviewed since alert level 3 in New Zealand (c. 1,200 per wave)

▲ Indicates a statistically significant increase from previous time period

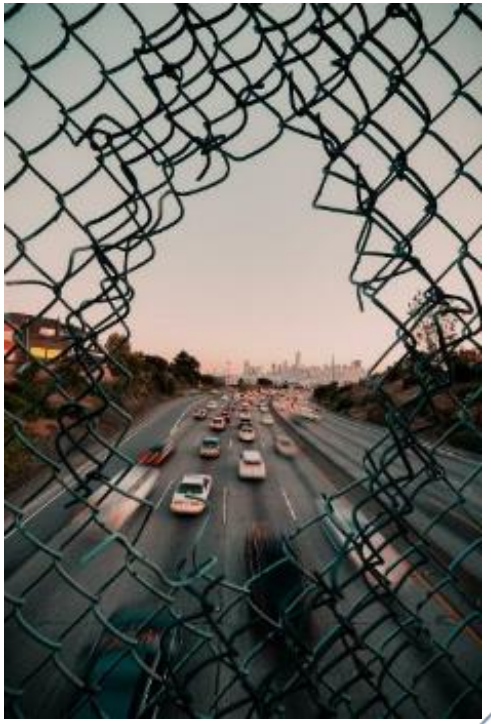
▼ Indicates a statistically significant decrease from previous time period

Section 6 – Modal changes

Key findings – modal changes

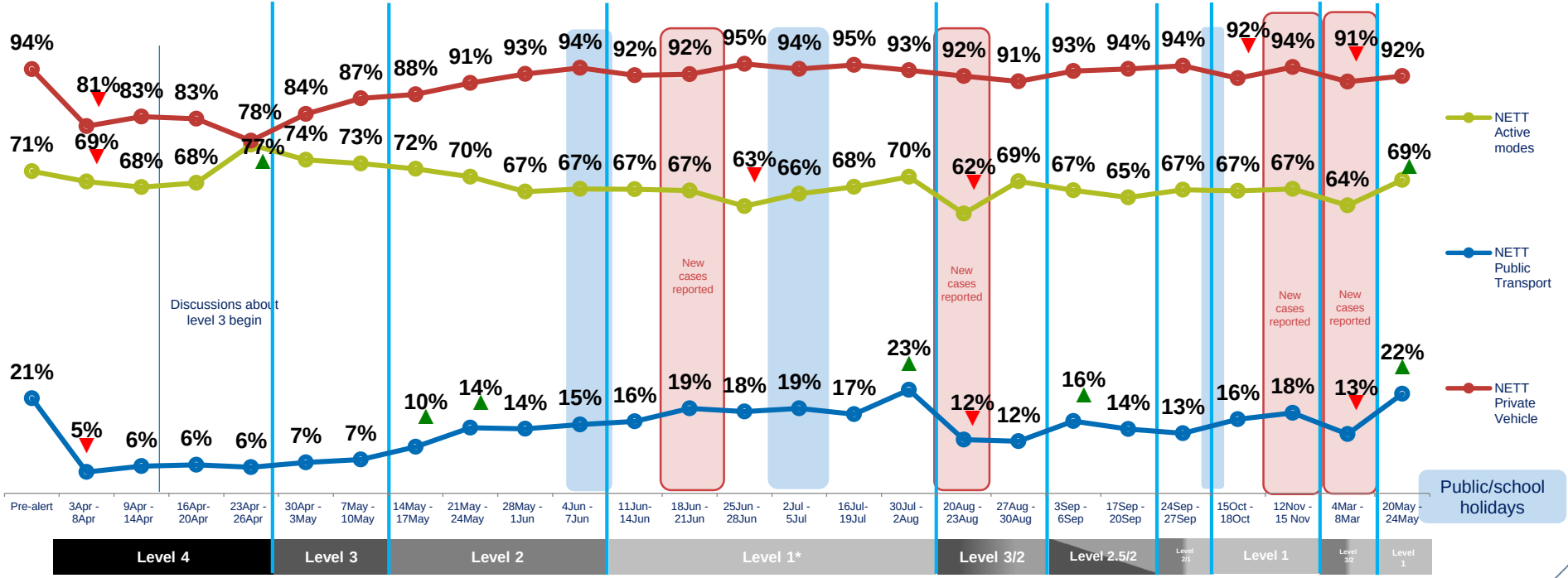
Waka Kotahi objective – how and why is travel changing?

- 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.
- May 2021 saw the highest stated volume of public transport network users since August 2020. Indeed, stated weekly public transport usage was only four points short of usage intent for the following week – the lowest that this gap has been since September.
- Stated past week usage increased significantly for all public transport modes, with train, ferry and taxi usage apparently occurring at higher rates than would've been seen before the outbreak of COVID-19.
- Active mode travel also saw significant growth, with almost seven in 10 choosing to walk for more than 10 minutes on at least one journey even as the nation enters into winter.
- While many public transport users appear to be returning to the network, there are still some travelling at much lower frequencies compared to March last year. For more than half of these there is just a lack of need, as they still do not need to make all the sorts of journeys that they used to, or can access their destinations in other ways.
- However, many are waiting for the rollout of vaccinations before they return to buses, trains and ferries.
- As has often been the case, the proportion staying off public transport in fear that others will not wear masks is *greater* than the proportion who are being kept off by mask mandates. In all, masks and face coverings on PT appear to be a net positive: a quarter say they are more likely to use PT because of masks, compared to 13% who are less likely. For the majority of New Zealanders the mask mandate makes no difference to their PT usage.



Stated weekly public transport usage has recovered to the highest level seen since last August, with active mode travel also increasing significantly

Changes in mode usage by wave – national

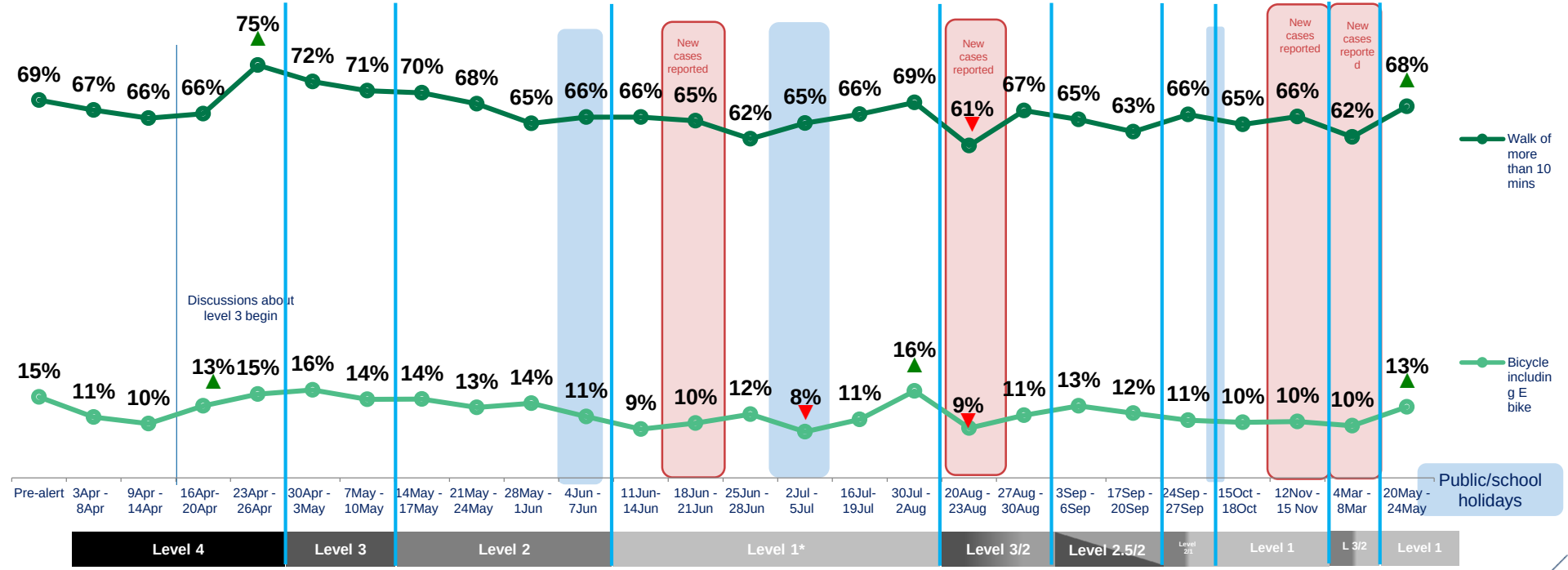


QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?

Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 25 (n= between 1,230 – 1,407)

Stated weekly cycling and walking also grew significantly in May to levels last seen in late August of last year

Changes in mode usage by wave – national

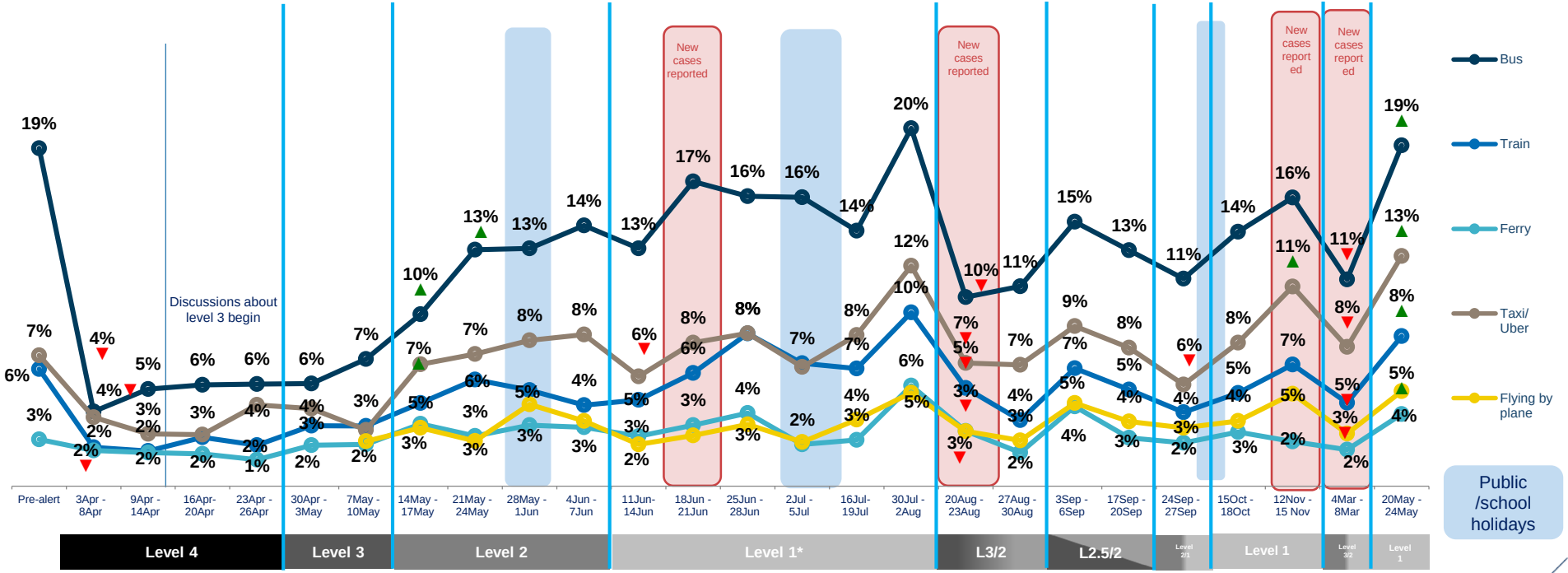


QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?

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

All major public transport modes saw significant increases this wave, with stated train and taxi usage once again above stated pre-lockdown levels

Changes in mode usage by wave – national

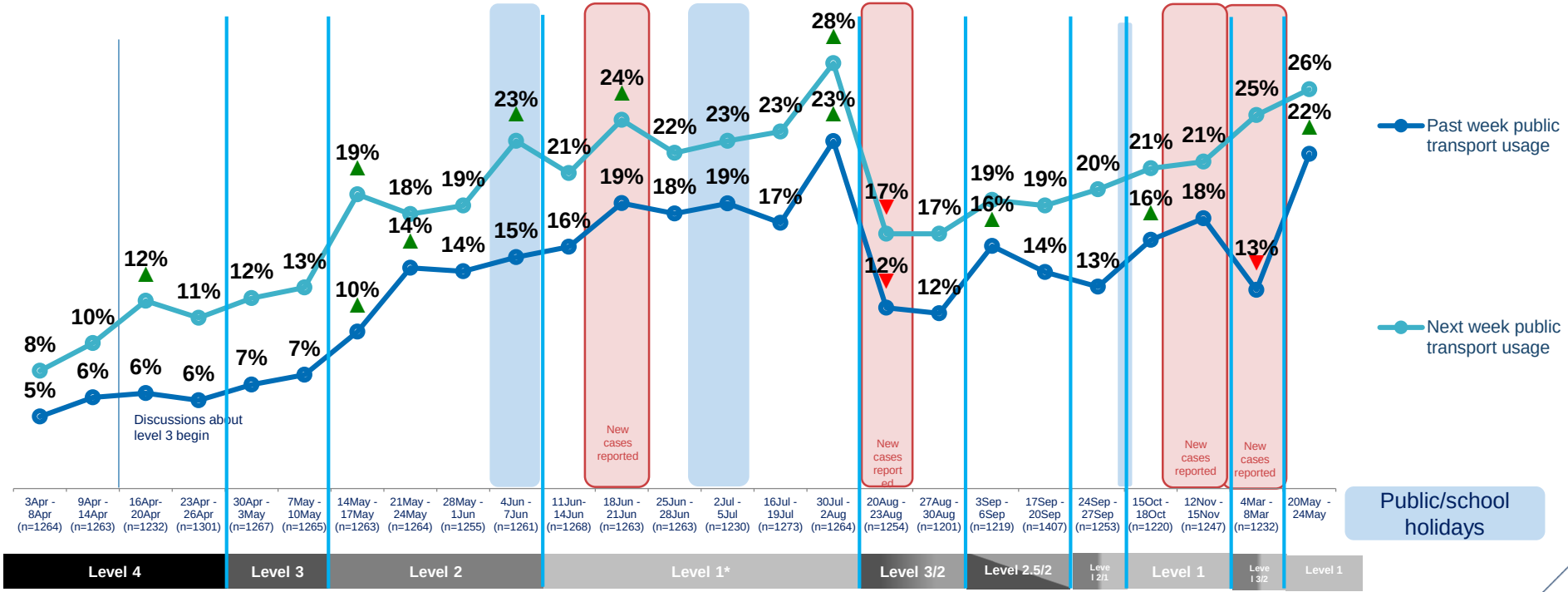


QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?

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

Intended use of public transport continues to recover, with only a four point gap present now between actual vs intended use, indicating continued momentum of use

Modal shift by public transport

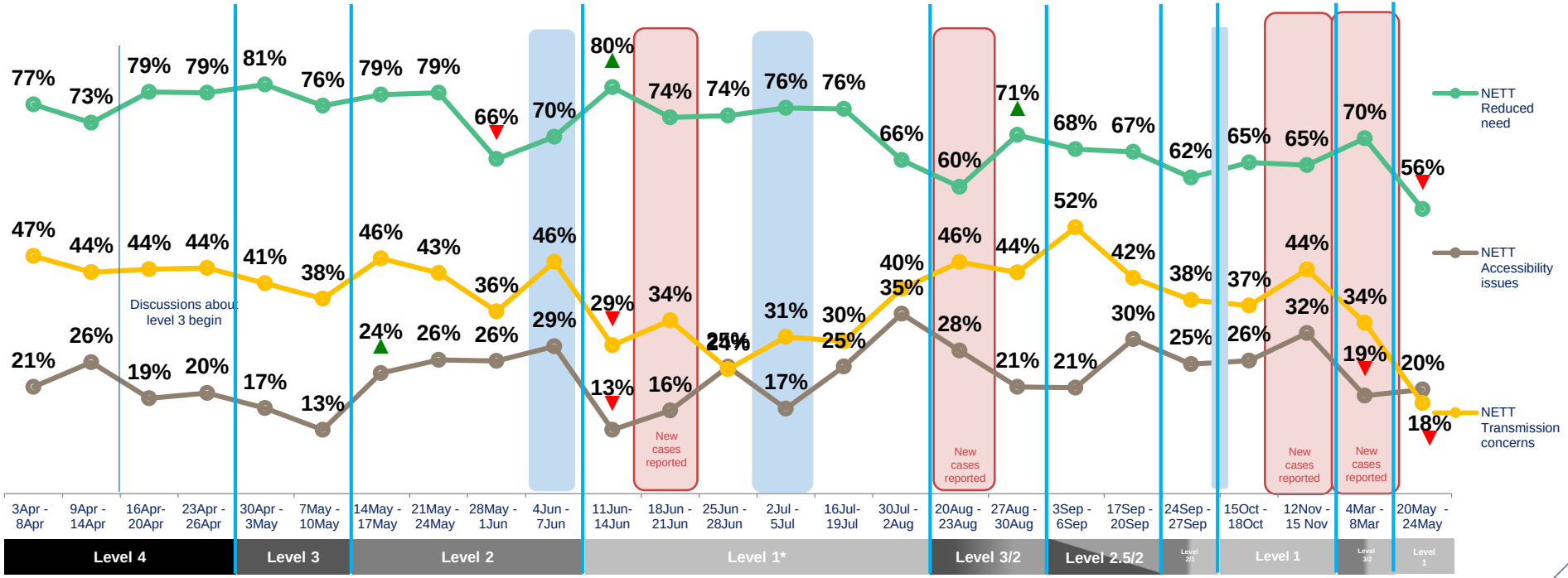


QFREQ2 – And during the past seven days, **on how many days** have you travelled via each of the modes listed below? QPT2 - If available next week, which if any of the following would you be likely to use?

Base: all adults 15+ in New Zealand (n= between 1,230 – 1,407 per wave)

Transmission concerns are now significantly less likely to be cited as a reason for reduced use of public transport and are at the lowest levels ever recorded

Reasons for decrease in PT activity

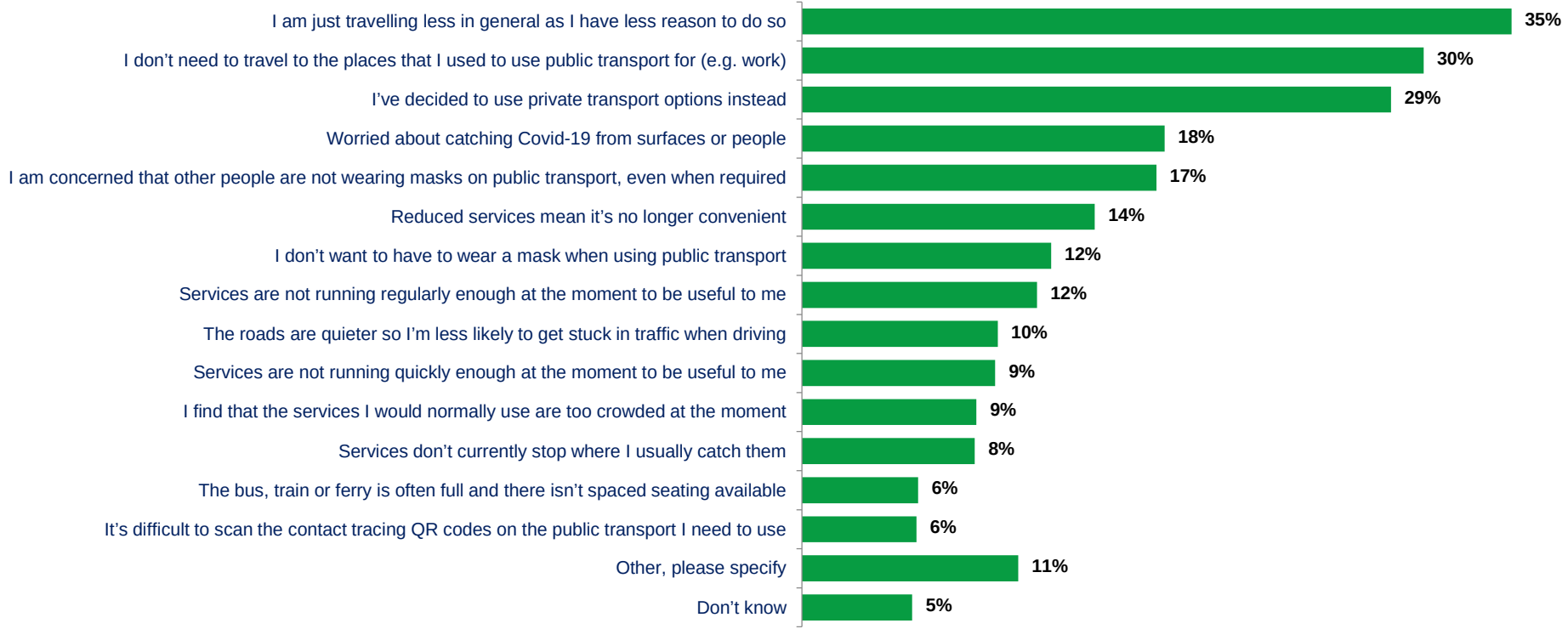


QDEC - For which, if any of the following reasons, has your use of public transport decreased?

Base: decreasing PT usage in past week; current alert level: level 1 (2nd)

While there has been a decline in reduced need barriers, they are still more common than other reasons, rejection of masks is only a barrier for one in 10

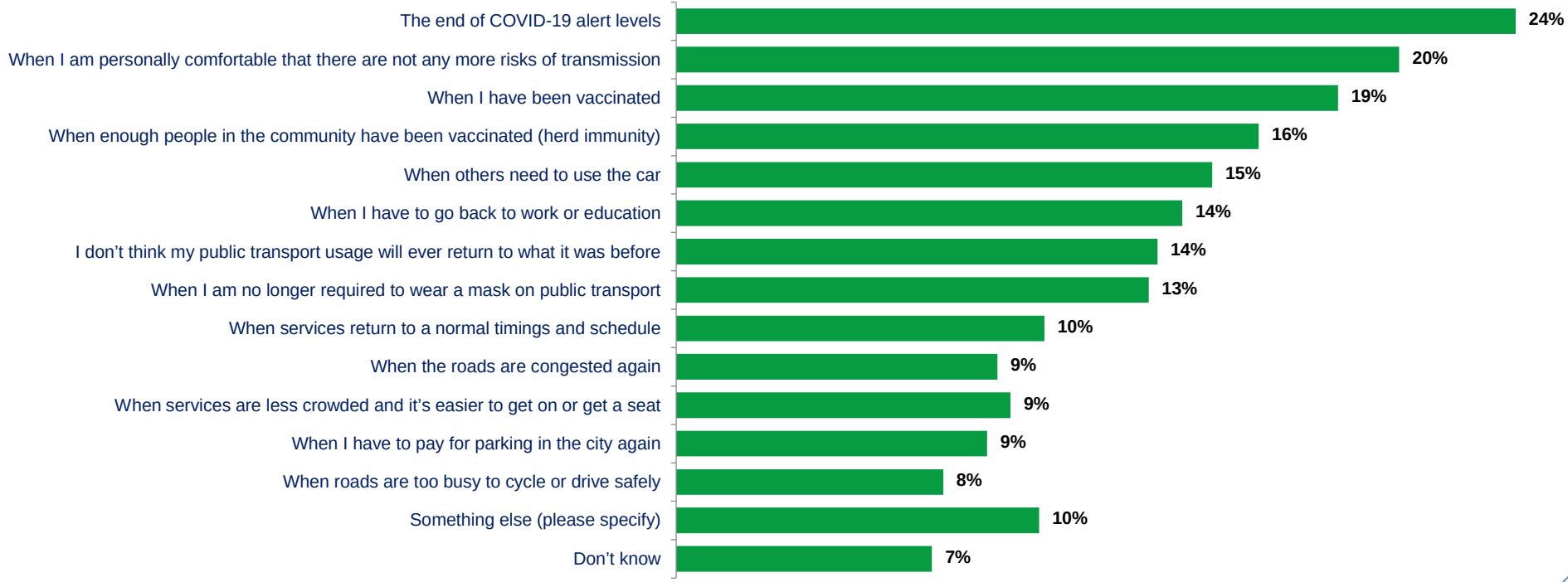
Reasons for decrease in PT activity (wave 25)



QDEC For which, if any of the following reasons, has your use of public transport decreased?
Base: decreasing PT usage in past week (n=170)

One in five expect to return to normal public transport usage once they have been vaccinated, but a quarter are still waiting for alert levels to come to an end

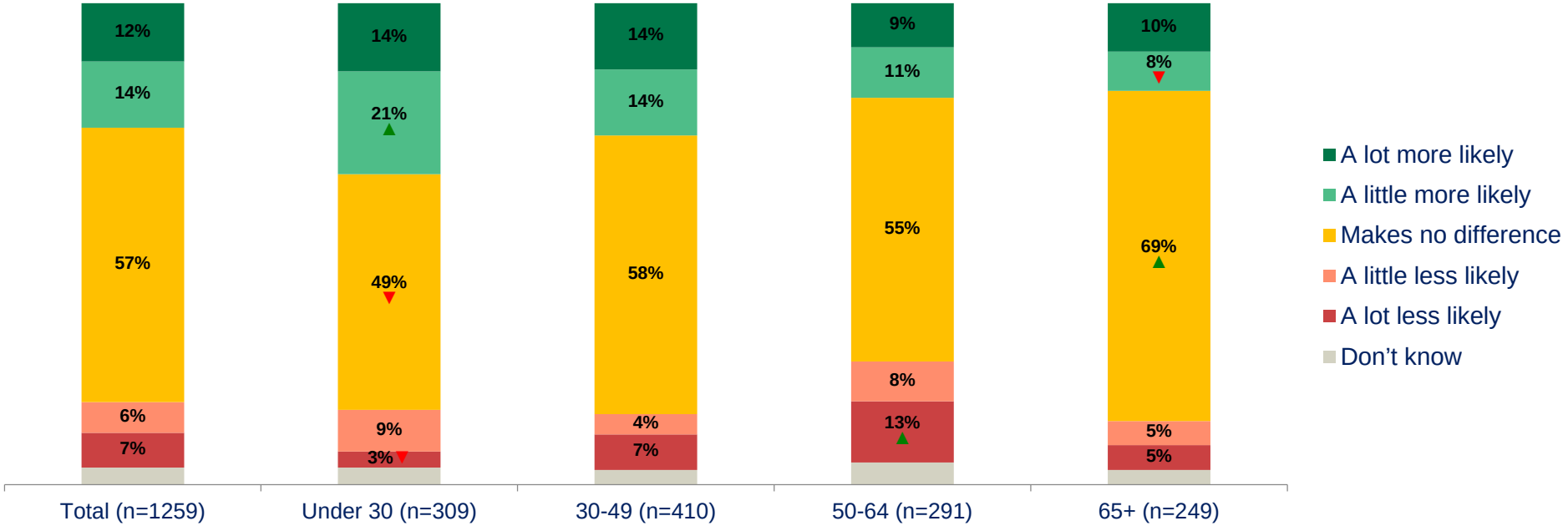
Triggers for return to PT activity (wave 25)



QDEC2 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=170)

Only 13% of people say mask adherence on public transport deters them from use, rising to 1 in 5 people aged 50-64 years and falling to 1 in 10 among 65+ year olds

Impact of masks on public transport by age



QMASK5. As you may be aware, anyone travelling on public transport in New Zealand is currently required to wear a mask or face covering whilst they are on the bus, train or ferry. To what extent does this rule make you more or less likely to use public transport, or does it make no difference?

Base: all adults 15+ in New Zealand

Section 7 – Working from home

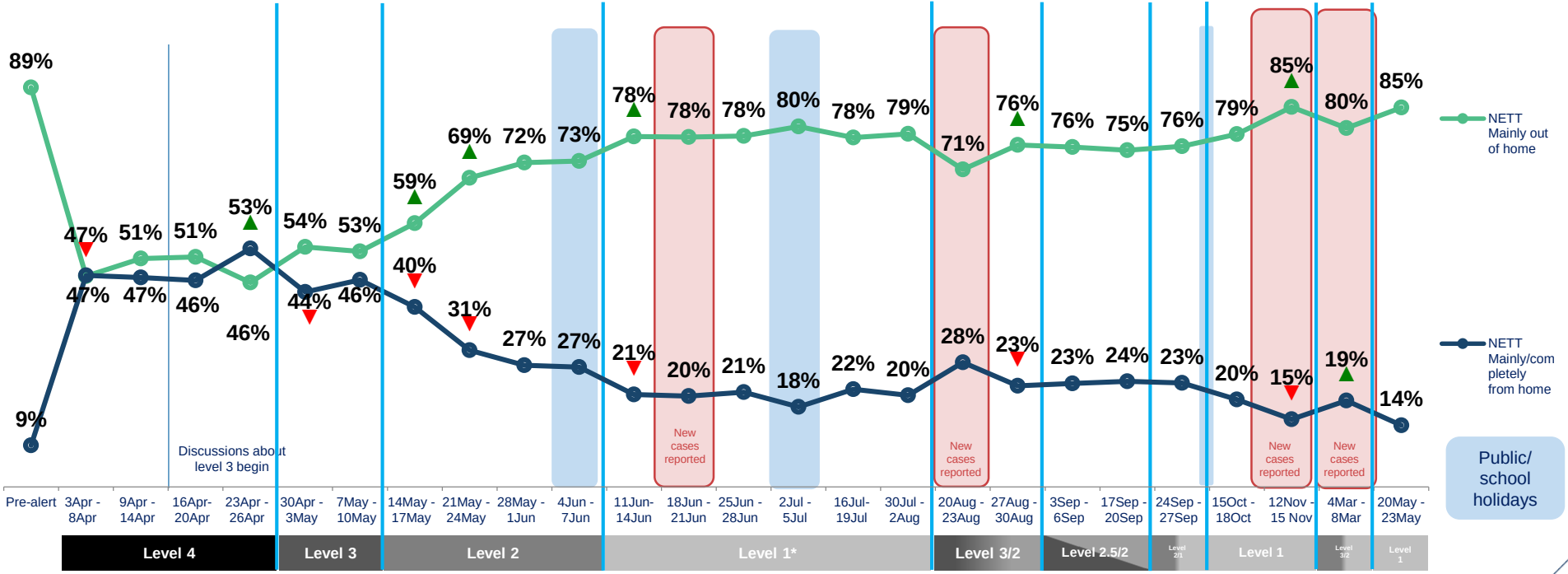
Key findings – working from home

Waka Kotahi objective – understanding behaviour change

- Commuter traffic makes up a large proportion of the impact on transport infrastructure. As alert levels decrease and restrictions are relaxed, it's important to understand who will return to work travel and how, and who will continue to be absent from the commuter population.
- The proportion working from home is now at the lowest level so far recorded, however it is still five points higher than it would have been before the outbreak of COVID-19.
- The public transport network is still more impacted by people working from home, as a greater proportion of public transport users are choosing to do so. The chief cause of this appears to be that they are more likely to have the ability to WFH, rather than simply being more eager to do so.
- Indeed, almost half of public transport commuters agree that they would only work from home as a last resort, a similar rate of rejection to private vehicle commuters.
- However, public transport and active mode commuters are a lot more likely to say that their workplace has made it easier for them to work from home and more likely to agree that they themselves could make a good case to their employer for doing so.
- Longer term, the workers most demanding of greater flexibility on work location are those who work in inner-cities and CBDs. Coincidentally it is this same group that reports significantly more change to workplace practices enabling them to do so.
- Lower levels of support for WFH practices (both by employee and employer activity) occur among those working in suburban and rural areas.
- The support among those commuting to these locations indicates that the sustained impact of working from home changes will be concentrated on public transport and active mode commuting.

Work travel patterns are again at rates seen in November last year, with a gap still present compared to stated pre-COVID activity

Proportion working in and out of home by survey wave – New Zealand

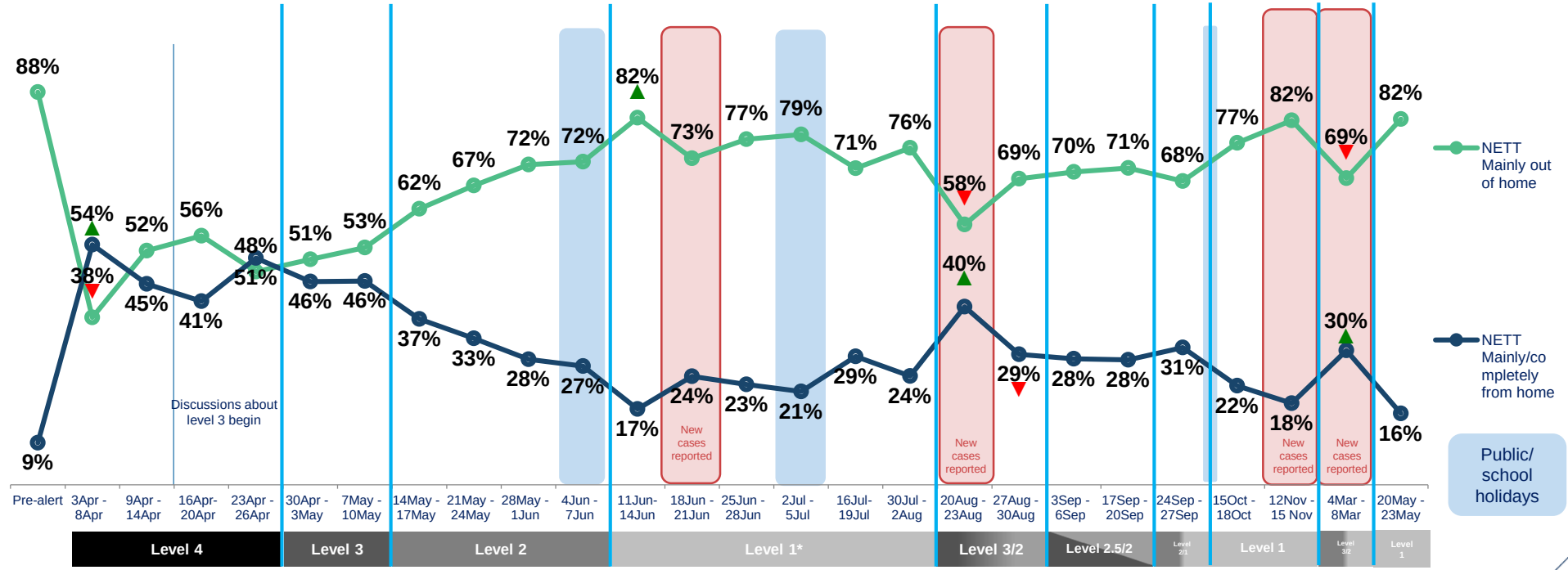


QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?

Base: all adults 15+ who are usually working

Auckland, the site of the last community outbreak, has seen work travel patterns return to 'normal' although the gap to pre-COVID is larger compared to the national

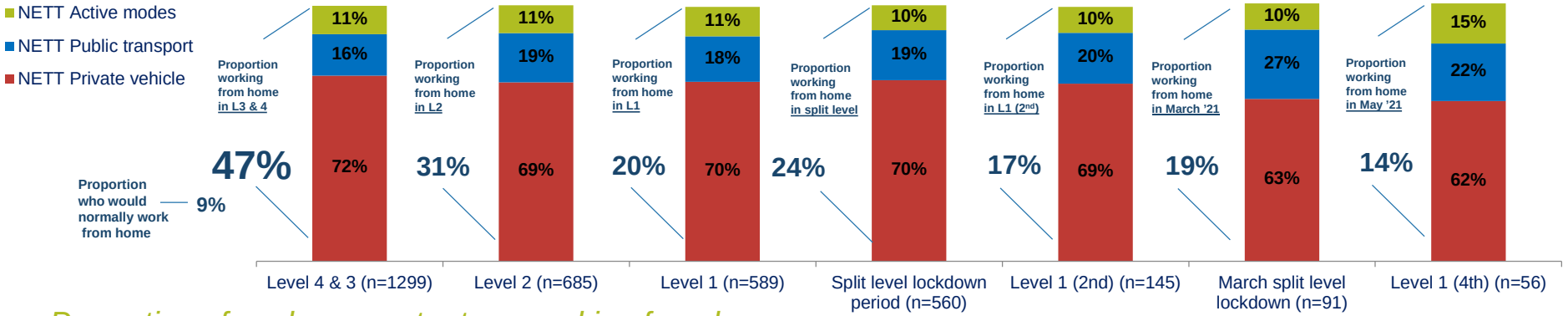
Proportion working in and out of home by survey wave – Auckland



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+ who are usually working and who live in Auckland

Public transport continues to be most impacted by the increase in commuters, although this difference is diminishing over time

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



Proportion of each commuter type working from home

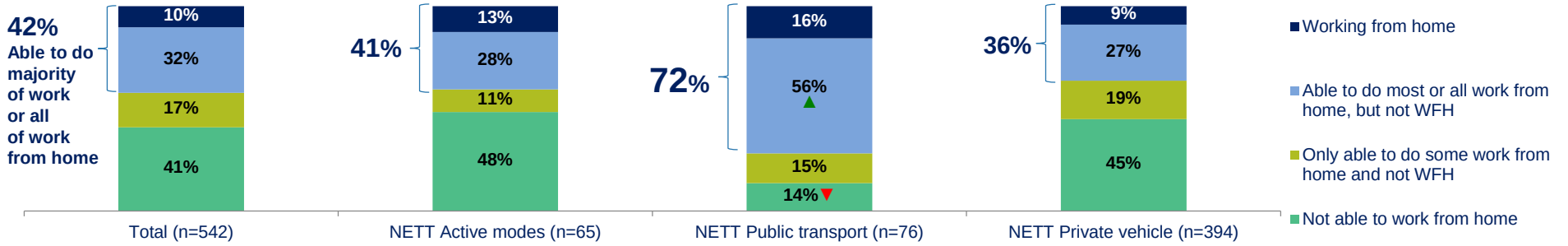
Proportion WFH by level	47%	31%	20%	24%	17%	19%	14%
Within active mode commuters	53%	31% ▼	17% ▼	18%	12%	15%	13%
Within private vehicle commuters	43%	25% ▼	13% ▼	16% ▲	11% ▼	13%	9%
Within public transport commuters	62%	42% ▼	24% ▼	36% ▲	19% ▼	29%	15% ▼

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

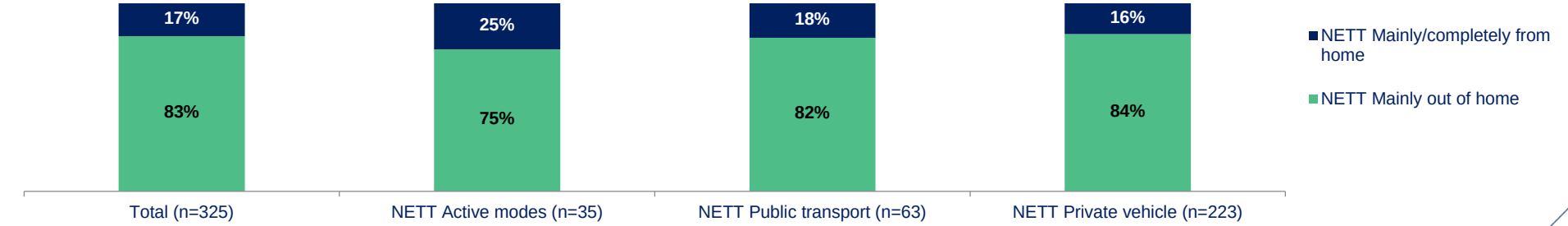
Base: all adults 15+ in New Zealand who normally commute by Active modes in L4&3 (n=292)/L2 (n=256)/ L1 (n=402)/split level (n=324) 2nd L1 (n=141)/ Feb (n=69) | Private vehicle L4&3 (1,748)/L2 (n=2,916)/split (n=2,390)/ 2nd L1 (n=895)/Feb (n=464)| Public transport L4&3 (n=323)/L2(n=295)/L1(n=436)/split(n=314)/ 2nd L1 (n=152)/Feb (n=83*) *low base, interpret with caution*

Higher rates of WFH among habitual public transport commuters are driven by these commuters having greater permission to do so, rather than preference

Working from home feasibility by normal commute mode



Working from home among those able to do so by normal commute mode

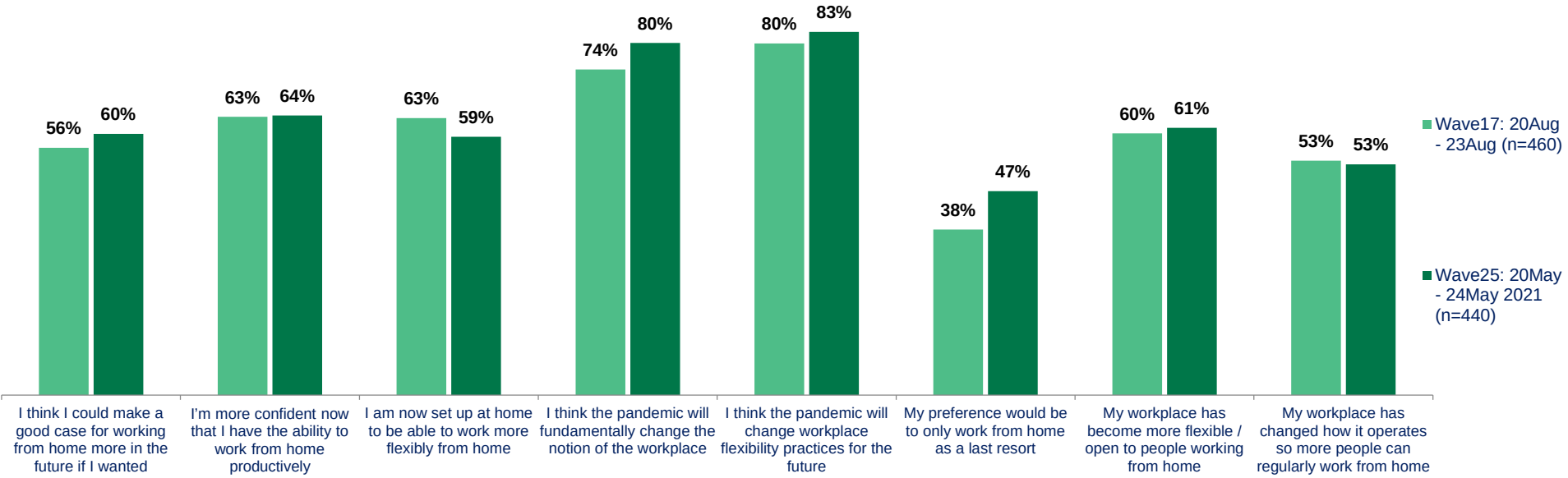


QWORK2A/QWORK2D And where do you currently work? Which, if any of the following applies to your job?

Base: all working adults 15+ in New Zealand interviewed in waves 25 who would normally commute via each mode, of those, all able to work from home.

There hasn't been a significant change in WFH attitudes since they were measured last winter, but the proportion considering WFH as a last resort is up nine points

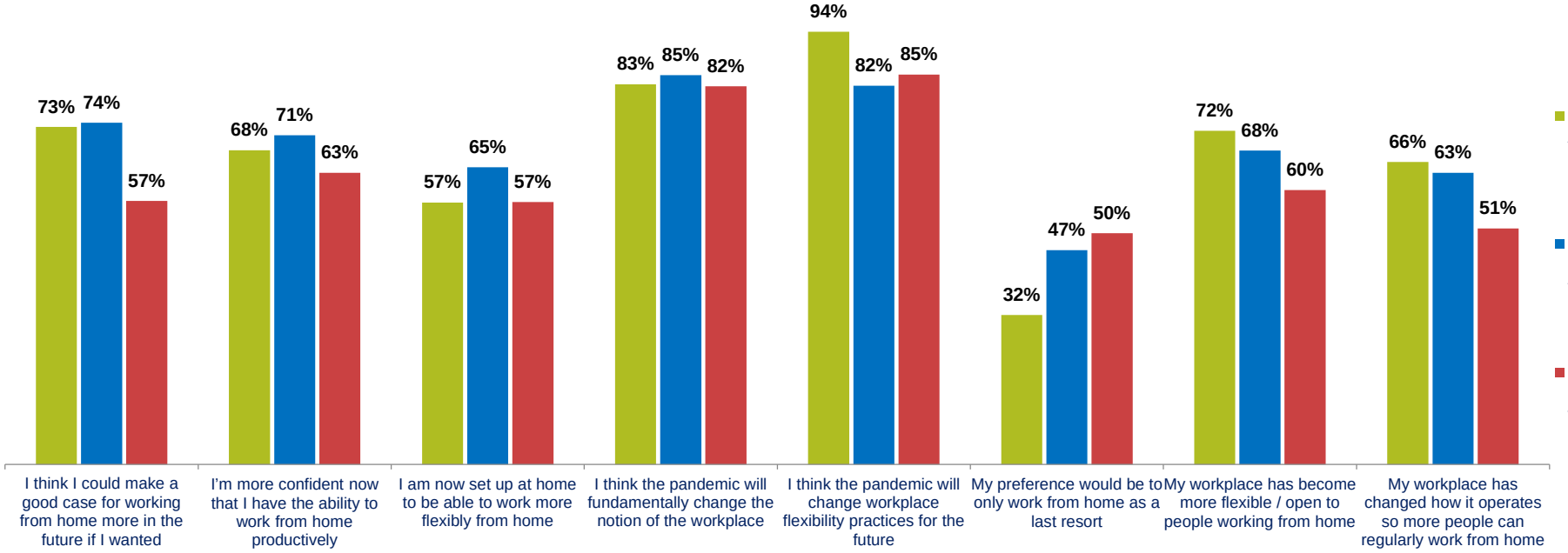
Future attitudes to working from home – % agree



QWORK6a.Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?
Base: All adults 15+ in New Zealand who were in work before lockdown

Private vehicle commuters seem less enabled to WFH and more likely to reject it when compared to active mode commuters

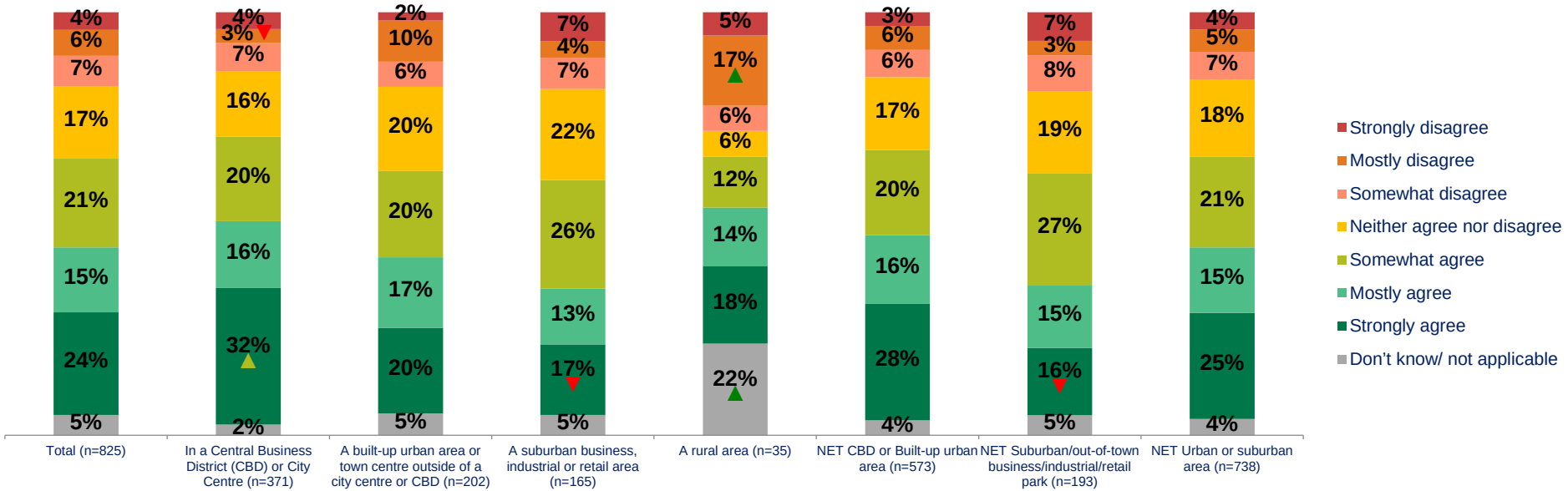
Future attitudes to working from home – % agree by normal commute mode



QWORK6a.Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?
Base: All adults 15+ in New Zealand who were in work before lockdown

The majority of New Zealand's working population would like more work flexibility, with CBD workers strongest in this sentiment and rural workers the weakest

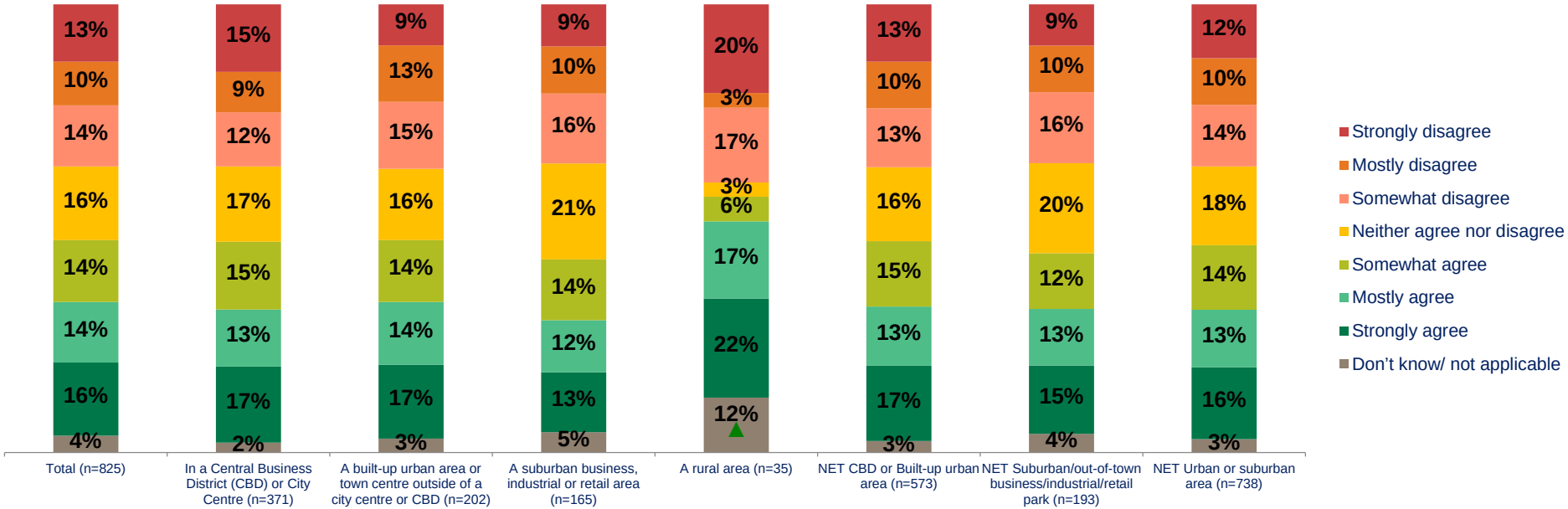
Future attitudes to working from home – (all responses from August 2020 and May 2021)
'Now that I've experienced it, I would like more flexibility to work from home'



QWORK6a.Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?
Base: All adults 15+ in New Zealand who were in work before lockdown interviewed in waves 17 and 25 who provided detail on work location

However, some 44% of people surveyed across August and May feel that working from home would only be a last resort, proportionately higher among rural workers

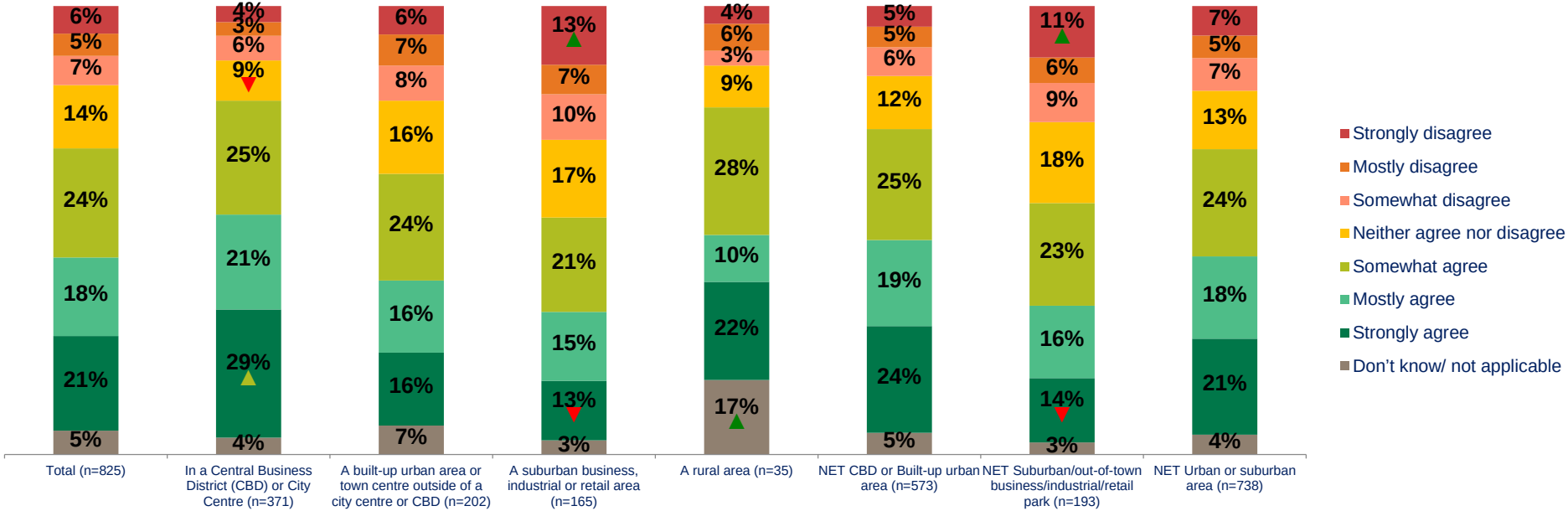
Future attitudes to working from home – (all responses from August 2020 and May 2021)
'My preference would be to only work from home as a last resort'



QWORK6a.Thinking now about how people's work habits have changed, to what extent do you agree or disagree with the following statements?
Base: All adults 15+ in New Zealand who were in work before lockdown interviewed in waves 17 and 25 who provided detail on work location

Majority of New Zealand workers report that their workplaces have become more flexible with people working from home, with flexibility strongest among CBD workers

Future attitudes to working from home – (all responses from August 2020 and May 2021)
'My workplace has become more flexible / open to people working from home'



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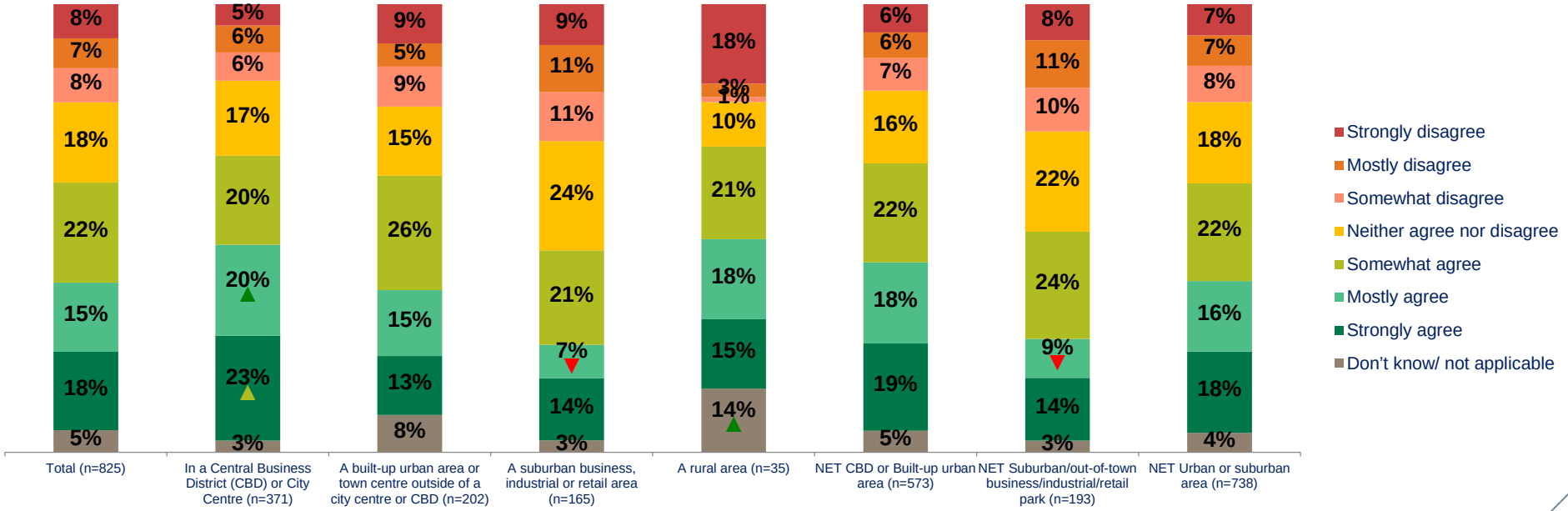
This change in workplace sentiment is also reflected in the fact that 55% of workers say that operations have changed so working from home can be more regular

Future attitudes to working from home – (all responses from August 2020 and May 2021)
'My workplace has changed how it operates so more people can regularly work from home'



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