



Waka Kotahi Covid-19 transport impact

Fieldwork wave 18 deep dive analysis – Wellington

2 September 2020

Disclaimer

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

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

For more information on the COVID-19 weekly tracker contact:
NZTAresearch@nzta.govt.nz.

Report content

COVID-19 transport impact

- Section 1 – About this research
 - Overview & technical notes
- Section 2 – Concerns
- Section 3 – Impact on Behaviour
- Section 4 – Public transport usage
- Section 5 – 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 weekly* basis

- such as trip frequency and journey type changes.

To understand **why travel is changing** and evolving in response to COVID-19 on a weekly 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 weekly* 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.

*From wave 14, fieldwork and reporting shifted to bi-weekly to account for limited shifts occurring in level 1.

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 weekly* sample of n=1259 per week, 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.

*From wave 14, fieldwork and reporting shifted to bi-weekly to account for limited shifts occurring in level 1.

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

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



Example: Harmoni dashboard page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys and domestic travel undertaken and changes

- change is measured since February 2020.

Modal shift patterns and perceptual shifts

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

Measuring attitudinal shifts towards COVID-19

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

Questions to classify into a variety of segments of interest

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

Ad hoc questions of interest

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

Report notes (i)

Key information to note for this report

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

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

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 – 16		Wave 17-18	
		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
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
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
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
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
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
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
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
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
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
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

*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.

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.

Context: New Zealand COVID-19 timeline



Deep dive analysis

Emergent stories and trends

- It is expected that with the constantly evolving nature of the COVID-19 pandemic, the changing alert levels governing public behaviour and emergent narratives impacting civil society discourse, the environment in which this research takes place will also be ever evolving.
- Deep dive analysis delivered as part of this research will enable questions to be answered outside of the core remit, and to periodically check in on societal variables and trends that may not be of interest every single week, but will speak to contextual changes and important landmarks in New Zealand's response to the COVID-19 overtime.
- Content included in the deep dive is generated from steering group requests.
- The emerging narratives in this deck are in places more complex than would warrant inclusion in the core report, included also are other narratives that may take on greater prominence later on when more responses are accumulated or when alert levels are changed.

Summary

Wave 18 Wellington deep dive

The eighteenth wave of fieldwork took place between Thursday 27 July and Sunday 30 August.

This deep dive is designed to investigate regional commonalities between Wellington and the rest of New Zealand, as well as ways in which the people of the Greater Wellington region differ in response to the realities around COVID-19.

Concerns

Concerns in Wellington around transmission increased significantly when community transmission was reported in Auckland, but have remained stable at this level in the second week of this split level lockdown

Self-isolating behaviours are significantly less common in Wellington compared to the rest of New Zealand and haven't really increased in response to the new lockdown.

Impact on Behaviour

Public transport usage has declined with the new lockdown, but in general the proportion travelling to work, education and school remains largely unchanged.

Public Transport usage

Public transport usage has historically occurred at a higher volume in Wellington. Bus travel was almost back to normal rates in level 1 but fell away again even before the split-level lockdown mid August. Subsequently, transmission concerns have become more salient in Wellington as a barrier to public transport usage as have accessibility issues on services that now require distancing to use. Concurrently, perceptions of the bus as safe and hygienic have decreased significantly in Wellington as has the image of a convenient form of transport that can get you where you need to go.

Working from home

Public transport usage as a commuting mode has historically been higher in Wellington than the rest of New Zealand. As a result, a comparatively high proportion of those who are, or have been, working from home in Wellington are habitual public transport commuters.

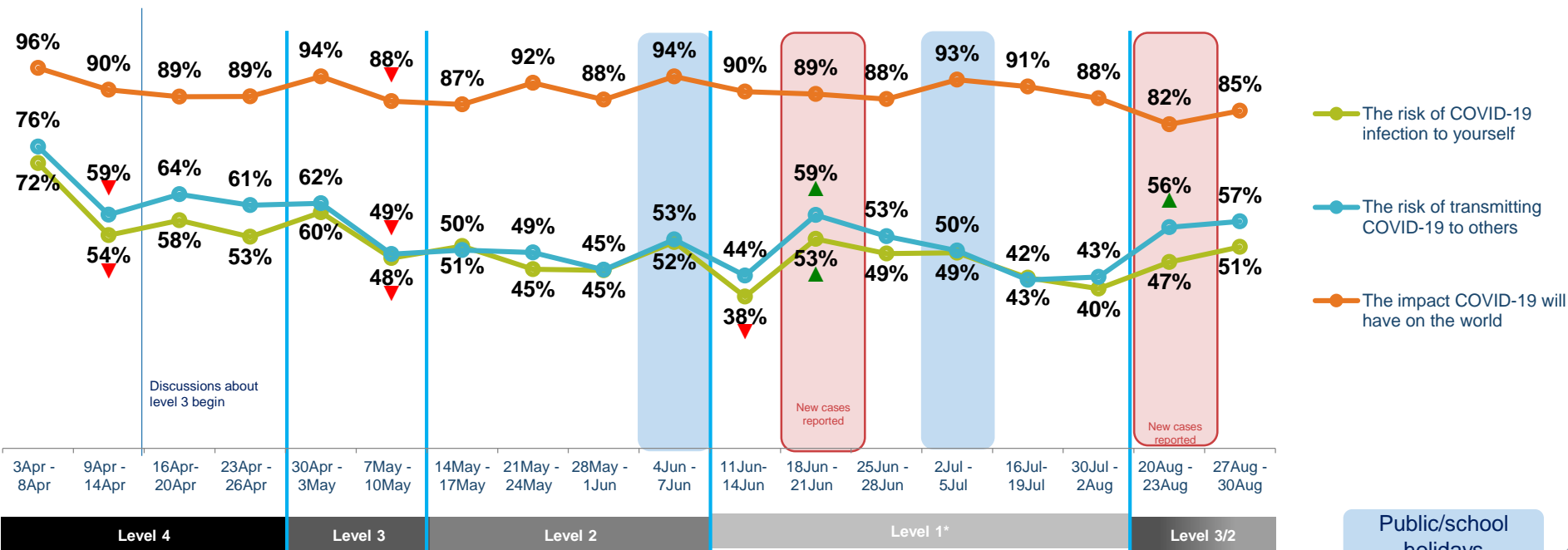
As a result, the national trend where public transport is disproportionately impacted by suspended commutes was accentuated in Wellington during the higher levels of lockdown with almost three quarters of public transport commuters working from home during levels 4 and 3. Active mode commuting was also heavily impacted during this period, with nearly two thirds of Wellington walkers and cyclists not commuting during this time.



Section 2 – Concerns

Concerns about infection and transmission increased significantly in Wellington following the announcement of new community transmission cases in Auckland

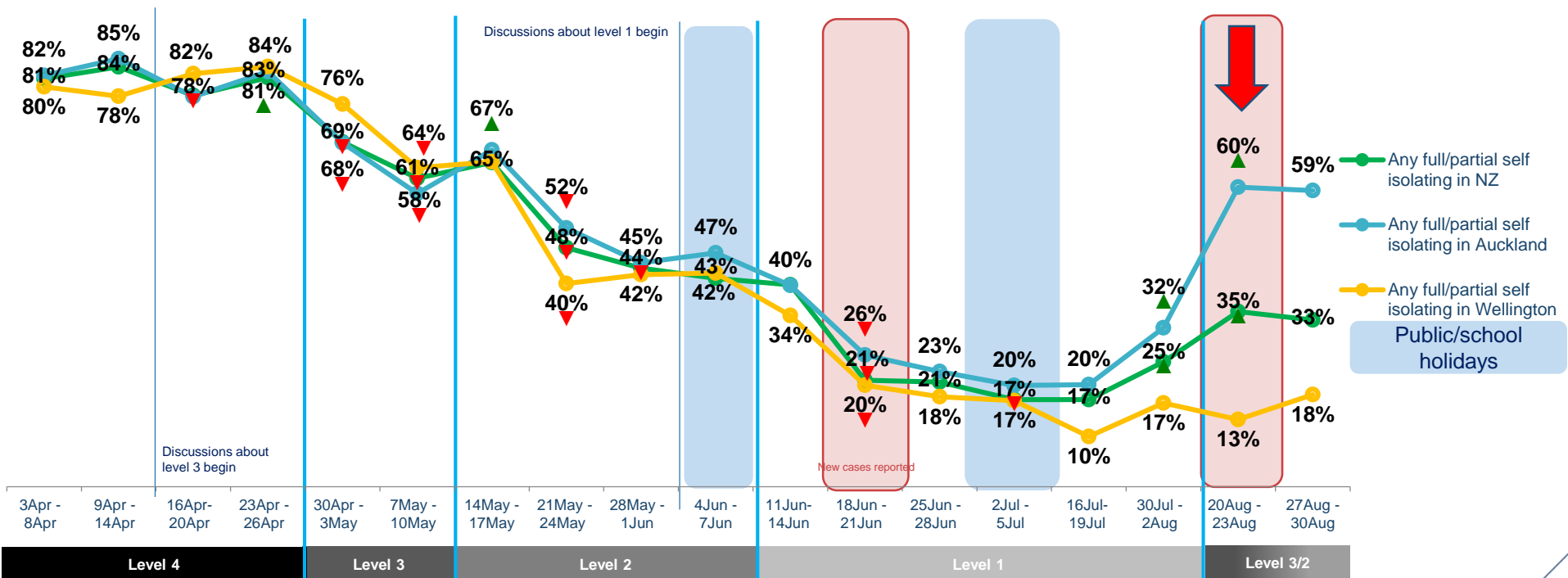
COVID-19 concerns (NETT all concerned)- Wellington



QPTUSE3. How personally concerned are you about each of the following?
 Base: all adults 15+ in Wellington (c. 185 per wave)

Self isolating behaviours remain uncommon in Wellington following the announcement of community transmission cases

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 –

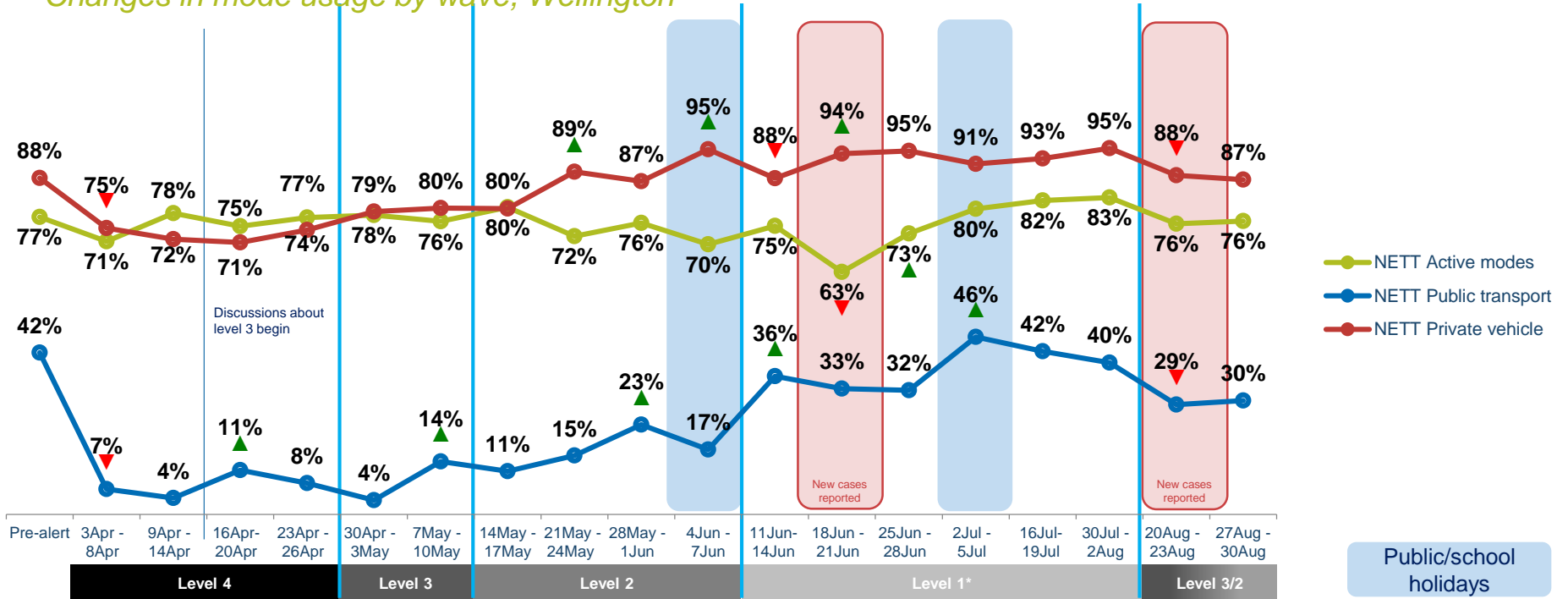




Section 3 – Impact on behaviour

Public transport usage in Wellington experienced a statistically significant decrease with the announcement of new community transmissions

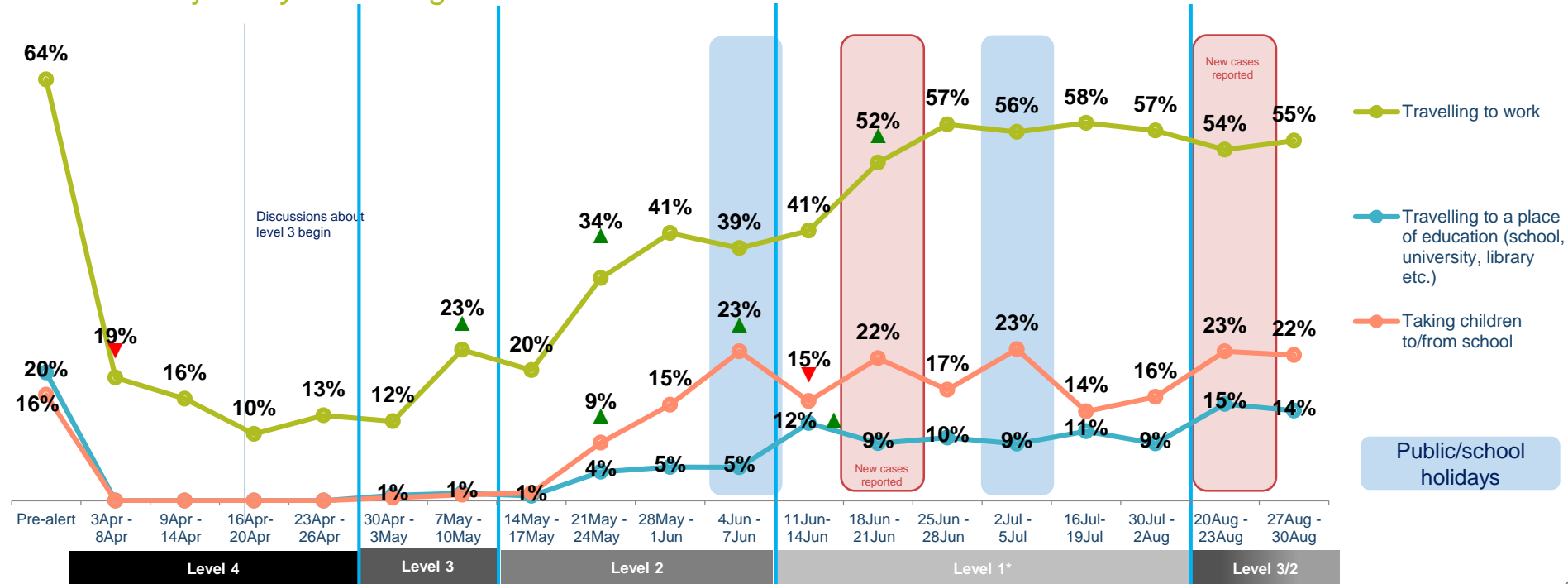
Changes in mode usage by wave, Wellington



QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)?/ And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Wellington (c.182 per wave)

Common daily journeys in Wellington have been largely unaffected by the new lockdown

Essential journeys – Wellington

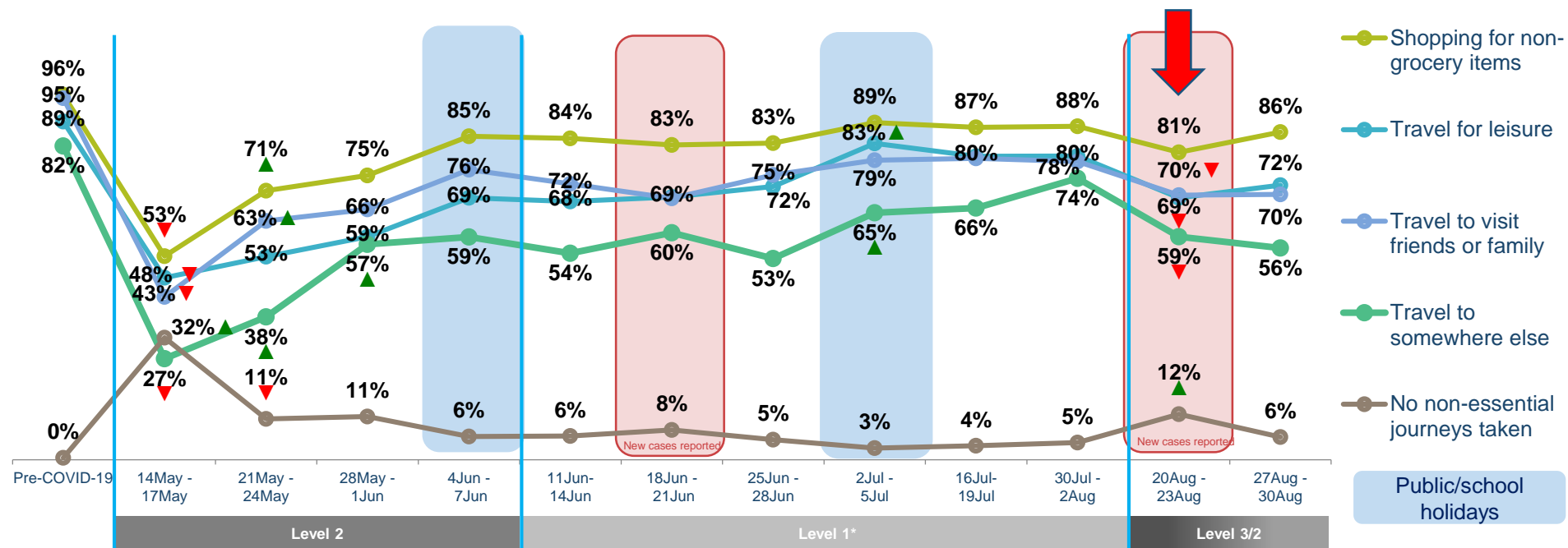


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Wellington (c. 182 per wave)



The new lockdown did lead to a significant decline in some non-essential journey types in Wellington, which hasn't yet begun to recover

Non-essential journeys – Wellington



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 and level 1 in New Zealand

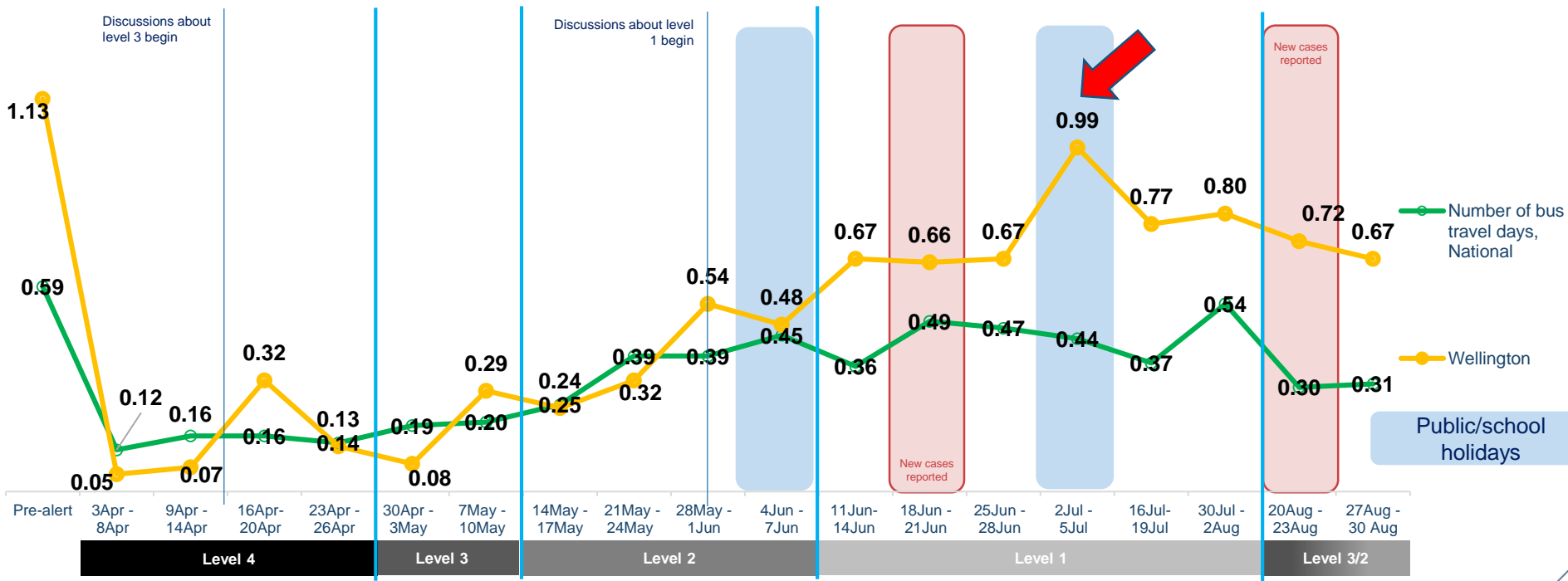




Section 4 – Public transport usage

Wellington bus usage has been higher than other regions, and was recovering to nearly one day of bus travel per week on average before the second lockdown

Bus travel – mode usage and frequency



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

Base: Adults 15+ in New Zealand



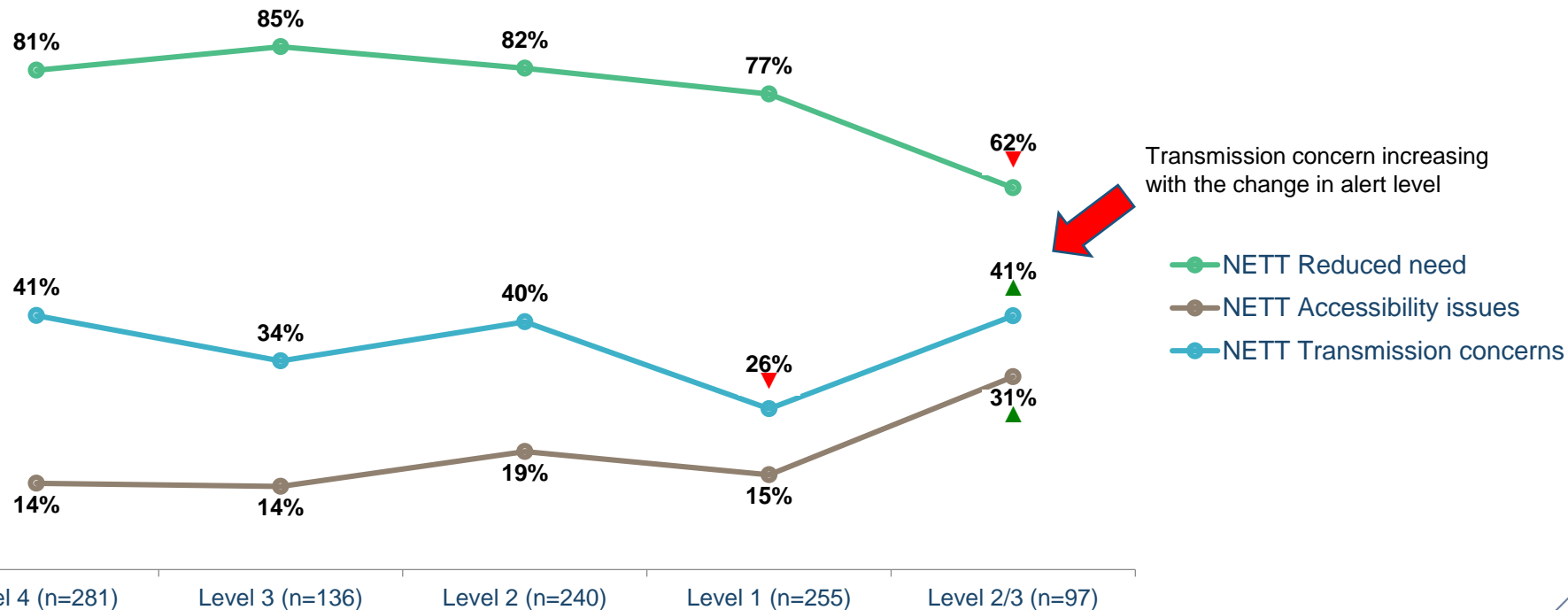
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

In the new split level lockdown, transmission concerns have become more salient, but this has been accompanied by a significant increase in accessibility issues

Reasons for decrease in public transport activity, Wellington



Transmission concern increasing with the change in alert level



- NETT Reduced need
- NETT Accessibility issues
- NETT Transmission concerns

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

Base: all in Auckland decreasing PT usage in past week



With recent alert level change to 2/3 significantly greater concern about bus travel

Perceptions of the bus, Wellington

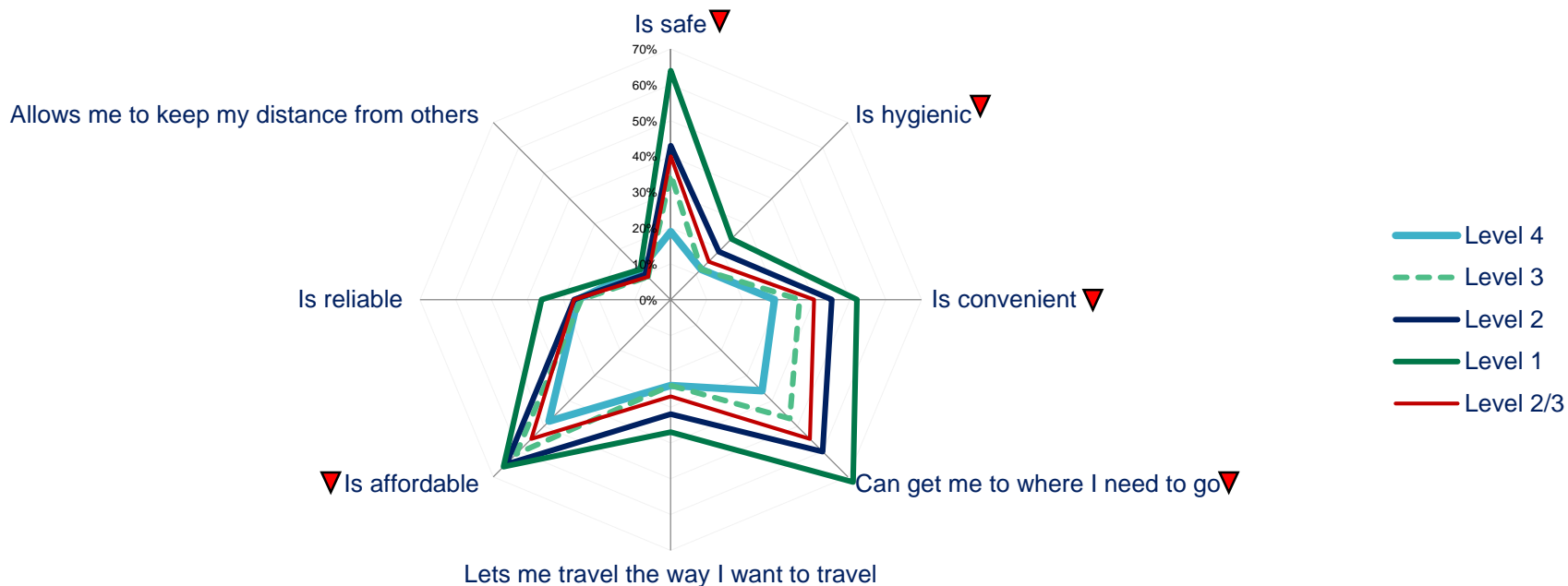


Image Statements - And which transportation methods would you currently associate with each of the following qualities?

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



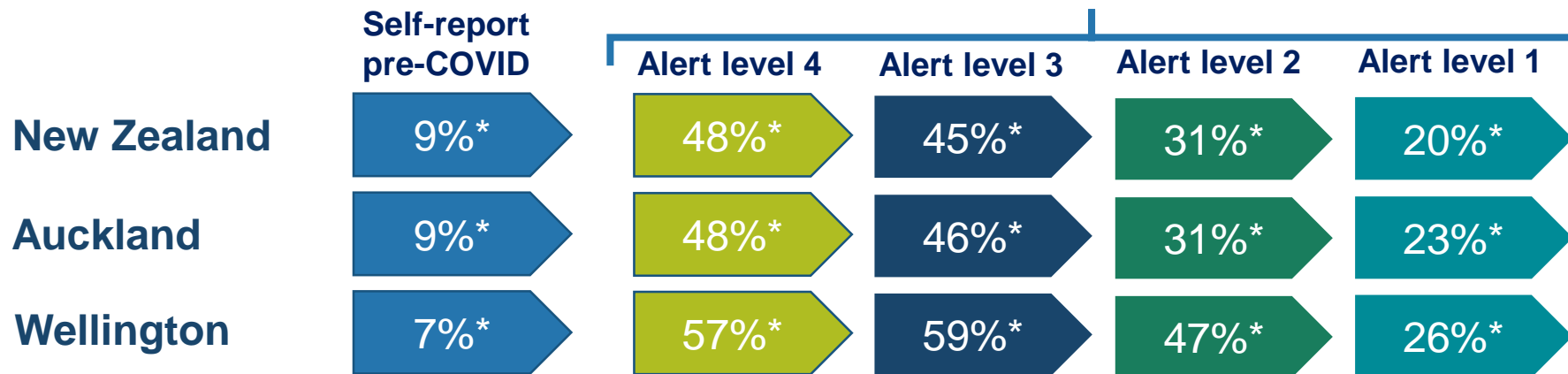
Section 5 – Working from home

Working from home

Potential for major impact on the transport network

National impact

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

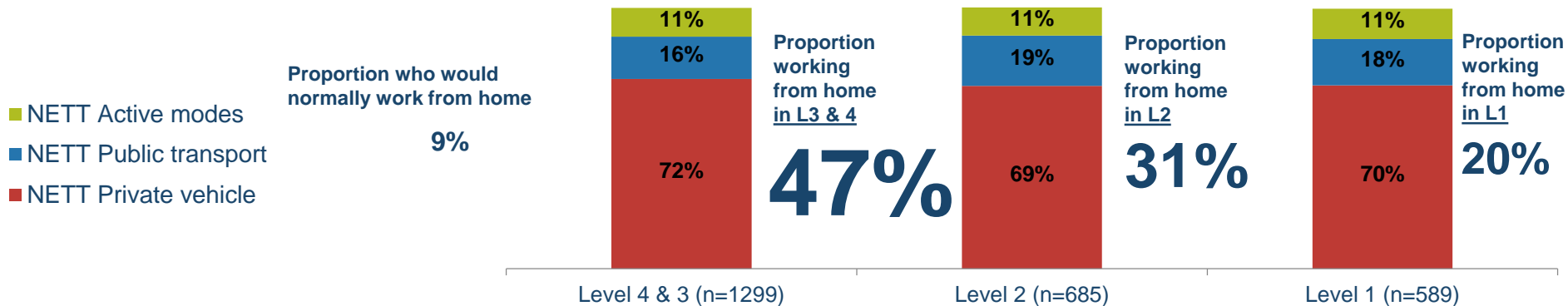


* mainly or completely from home

* mainly or completely work from home
Prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?

Working from home reduces the number of private vehicle trips more than PT trips, but PT has lost a larger proportion of commuters to working from home

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



Proportion of each commuter type working from home

Within active mode commuters	53%	31% ▼	17% ▼
Within private vehicle commuters	43%	25% ▼	13% ▼
Within public transport commuters	62%	42% ▼	24% ▼

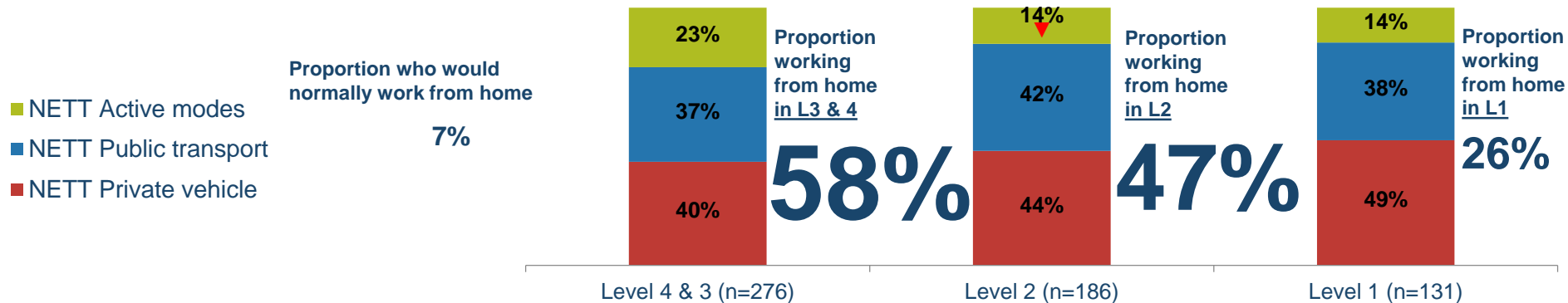
QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you *currently* work? By QMODE1_1 How would you normally make each of the following types of journeys listed below? – travelling to work

Base: all adults 15+ in New Zealand who normally commute by each of the modes mentioned



Wellington normally has more public transport commuters and as such, the working from home population skews this way more than in the rest of New Zealand

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



Proportion of each commuter type working from home in Wellington

Within active mode commuters	64%	34% ▼	20% ▼
Within private vehicle commuters	44%	37%	17% ▼
Within public transport commuters	73%	60% ▼	25% ▼

QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you *currently* work? By QMODE1_1 How would you normally make each of the following types of journeys listed below? – travelling to work

Base: all adults 15+ in New Zealand who normally commute by each of the modes mentioned



