

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–8 weekly core report

26 May 2020

Disclaimer

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

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

For more information on the COVID-19 weekly tracker contact:
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COVID-19 transport impact

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Section 1 – About this research

Study purpose and importance

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

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

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

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.

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) This 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: Harmony 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 eight waves of fieldwork, as per the table to the right:
- Total 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 and 8, as well as individual waves where appropriate.
- The focus of this report is tracking the 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 8 report is based on a statistically significant shift of results between waves 1 to 8, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs combined level 2 alerts.
- 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 all eight waves.

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	

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		Wave 7 - 8		Wave 8	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*
Total		n=5,060	1.38	n=2,532	1.95	n=2,527	1.95	n=1,264	2.76
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=662	3.81	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=200	6.93	n=100	9.8
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=200	6.93	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=431	4.72	n=220	6.61
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=200	6.93	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=200	6.93	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=634	3.89	n=313	5.54
Disability, Vulnerability and COVID-19**									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=296	5.7	n=151	7.98
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=574	4.09	n=294	5.72
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=326	5.43	n=178	7.35

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

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

Context: New Zealand COVID-19 timeline





Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–8

Waka Kotahi COVID-19 transport impact tracker

- Compared to wave 7, this week's fieldwork has taken place completely in level 2 and so is indicating a stronger change in many activities and attitudes.
- Local journeys continue to increase, with more work travel, taking children to school, grocery shopping and for the first time an increase in travel for medical appointments.
- While private vehicles are still the dominant mode of travel, the proportion using public transport at least once a week continues to recover and the number of users has returned to two thirds the normal level. ***Note that this does not necessarily equate to an equivalent increase in the number of trips being made.***
 - While service satisfaction has trended upwards, reported accessibility issues continue to be higher in level 2, and have the potential to arrest the recovery seen so far with public transport consideration having plateaued in the second week of level 2.
 - Although public transport usage is increasing, private vehicles are the dominant modes for the types of non-essential journeys that people are now able to make.
- Uptake of domestic journeys between regions remains low, with trips to visit family and friends the dominant longer-distance journey taken; this may change in light of the upcoming Queen's birthday long weekend.
- Image scores for active modes have declined in level 2, in line with a reduction in overall usage as a transport mode.
- There have been some improvements in some perceptions of public transport modes, with buses seen as more hygienic than they were before and trains seen as safer, if less reliable.
- As people see less restrictions in place, buy-in to lockdown conditions, belief in social motivators and perceptions of disruptions have reached all time lows. Combined, these may indicate a general inclination to return to normal travel activity soon.
- When it comes to domestic journeys and domestic tourism, the desire to see family and friends is a bigger draw than anything else, with this one of the major planned journeys and also the biggest single motivator for making tourist trips.
- Despite the expansion of school openings on 18 May, one in five parents say they haven't returned any of their children to school yet.

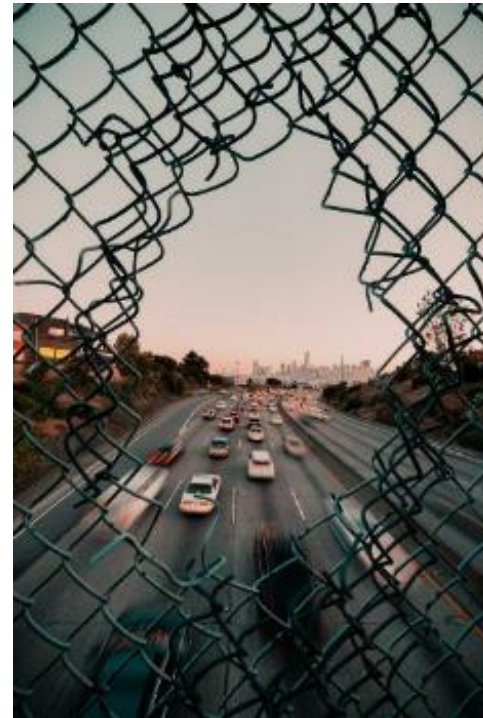


Section 3 – Local journeys and modes

Key findings – local journeys and modes

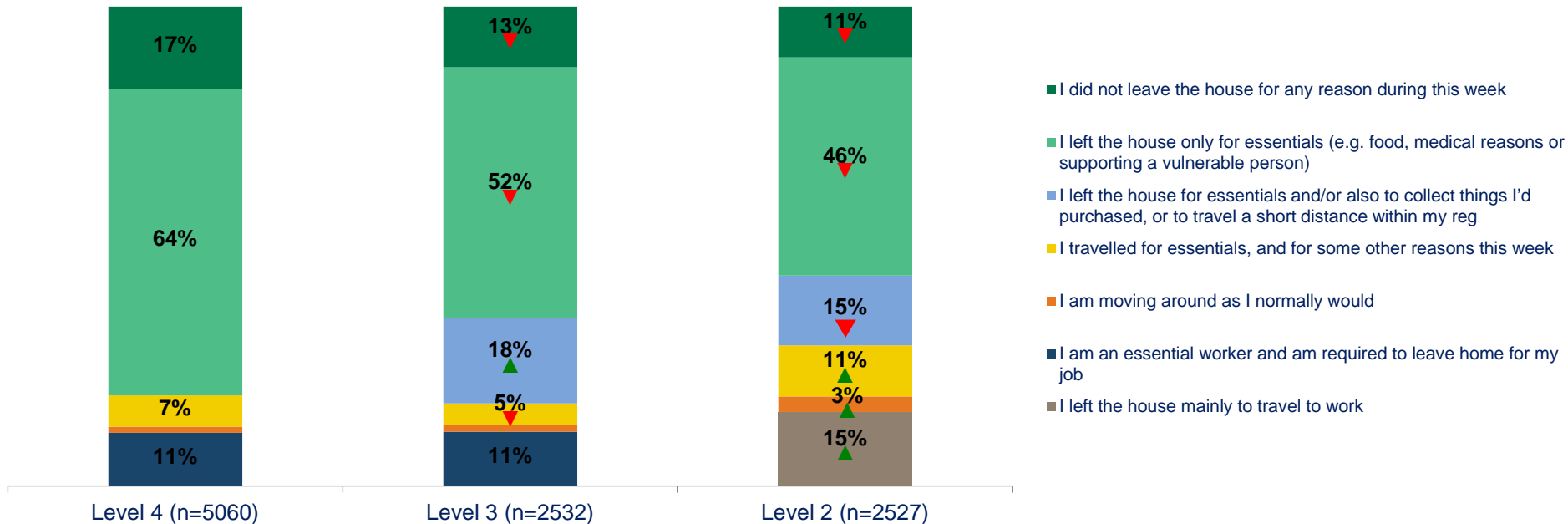
Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have been tracking both changes in journeys made and modes used.
- This section specifically focuses on travel for local, essential journeys during this time.
- General activity is returning to normal, but a number of people are still self-isolating.
- Work trips continue to be the main growth area of activity, while other journeys like taking children to school is also growing, and for the first time medical appointments are up.
- The proportion using cars at least once a week is close to returning to pre-alert levels, and although bus transport has risen significantly, it is still some distance from normal. Encouragingly, satisfaction with public transport services in general has been trending upwards as more users return to the service.
- Despite increased satisfaction with public transport, increasingly accessibility issues are being cited as reasons for not returning to public transport and consideration has stalled.
- The proportion saying that the shopping experience is easier than before is now one in five, with eight weeks having passed since lockdown conditions began.



Despite significant changes in activities undertaken in level 2, one in 10 are still fully self-isolating

Reported activity and movement during the past seven days by alert level, excludes exercise

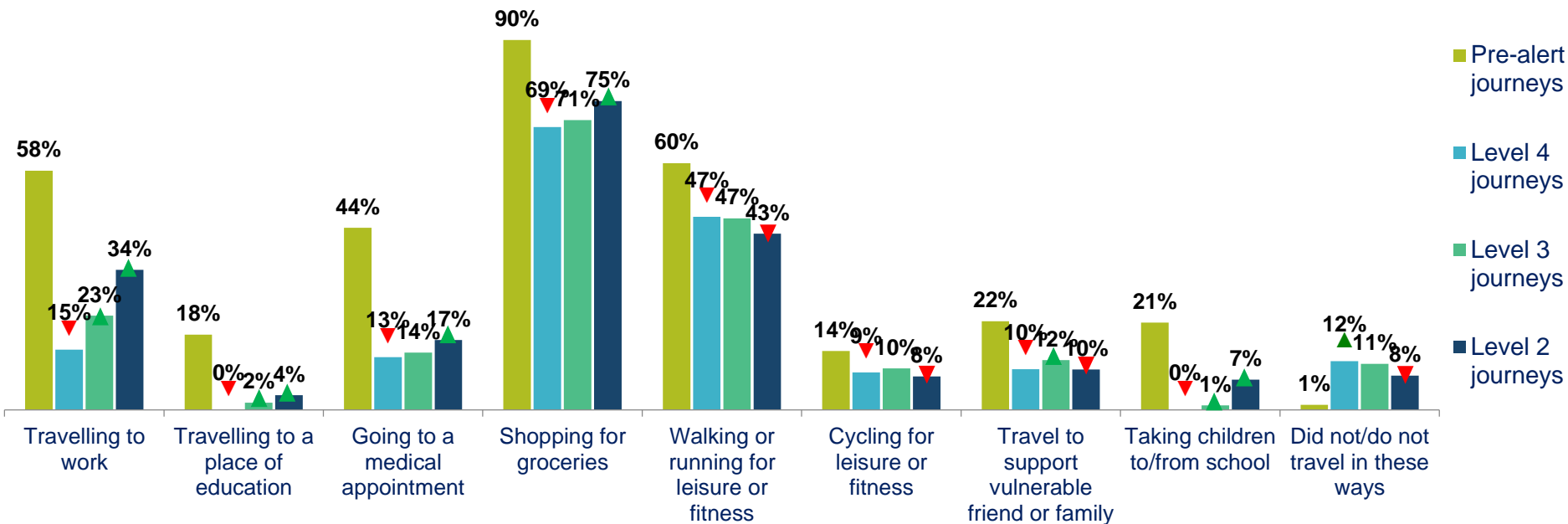


ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
 Base: all adults 15+ in New Zealand



The most significant changes in level 2 have been that a third are now travelling to work at least one day a week, with taking children to school also increasing

Reported activity and movement during the past seven days by alert level



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

Base: all adults 15+ in New Zealand in Benchmark wave (n=); Level 4 (n=5,060); Level 3 (n=2,532); Level 2 (n=1,263)



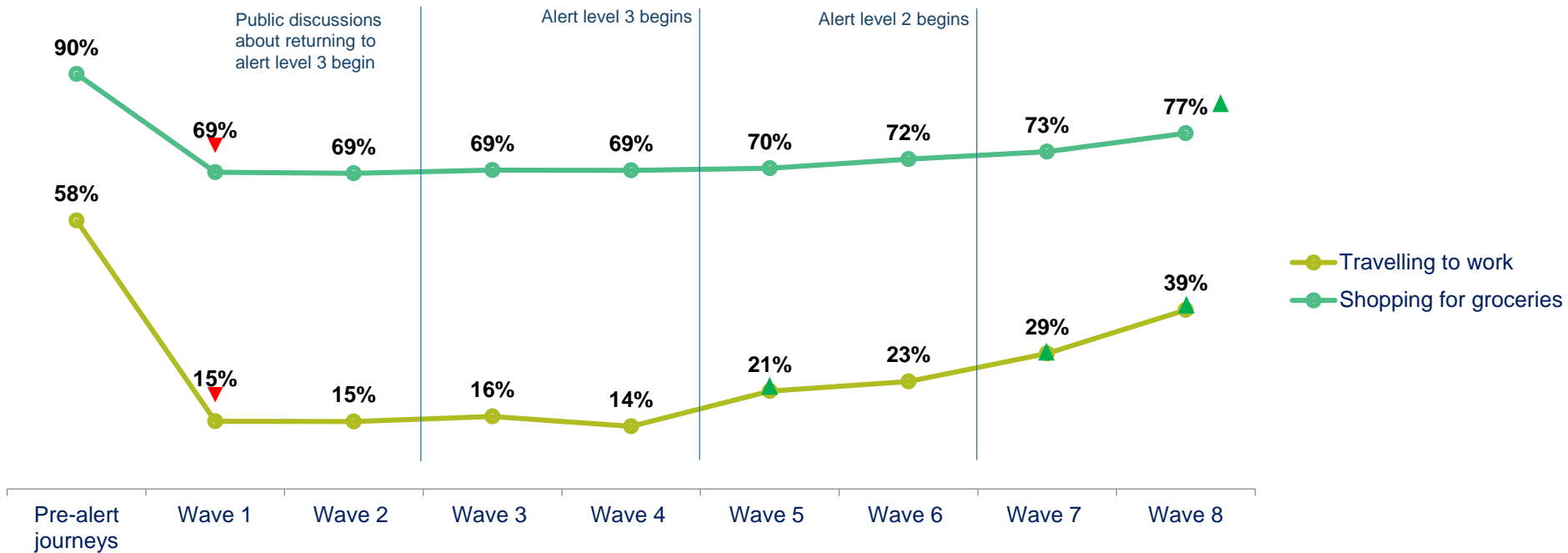
Indicates a statistically significant increase against previous time period



Indicates a statistically significant decrease against previous time period

In the most recent week almost two in five travelled to work, almost doubling since the first week of level 3, while grocery shopping continues to grow more slowly

Reported activity and movement during the past seven days by wave



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

Base: all adults 15+ in New Zealand Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264)



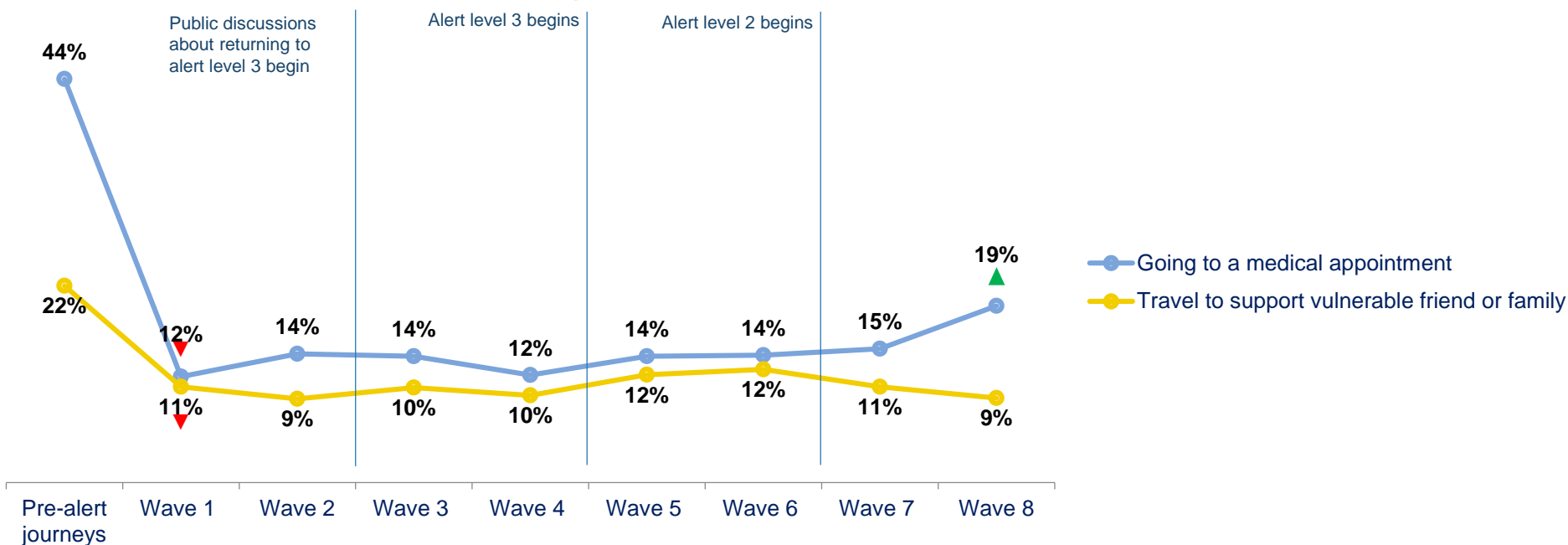
Indicates a statistically significant increase against previous time period



Indicates a statistically significant decrease against previous time period

The second wave of level 2 saw a significant increase in the proportion travelling to medical appointments, which may have been postponed under levels 3 and 4

Reported activity and movement during the past seven days by wave



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

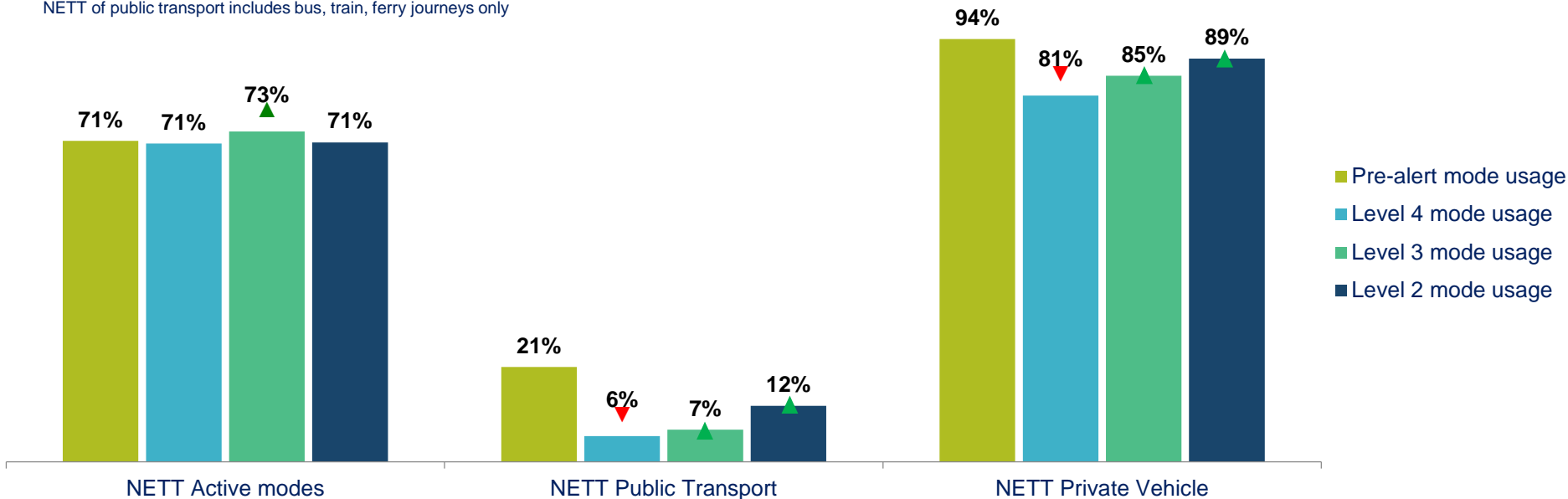
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Both public and private transport modes have seen significant increases in the proportion using them during level 3 and 2 weeks

Modes used in a normal week vs used in past week by alert level

NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.
NETT of public transport includes bus, train, ferry journeys only



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?

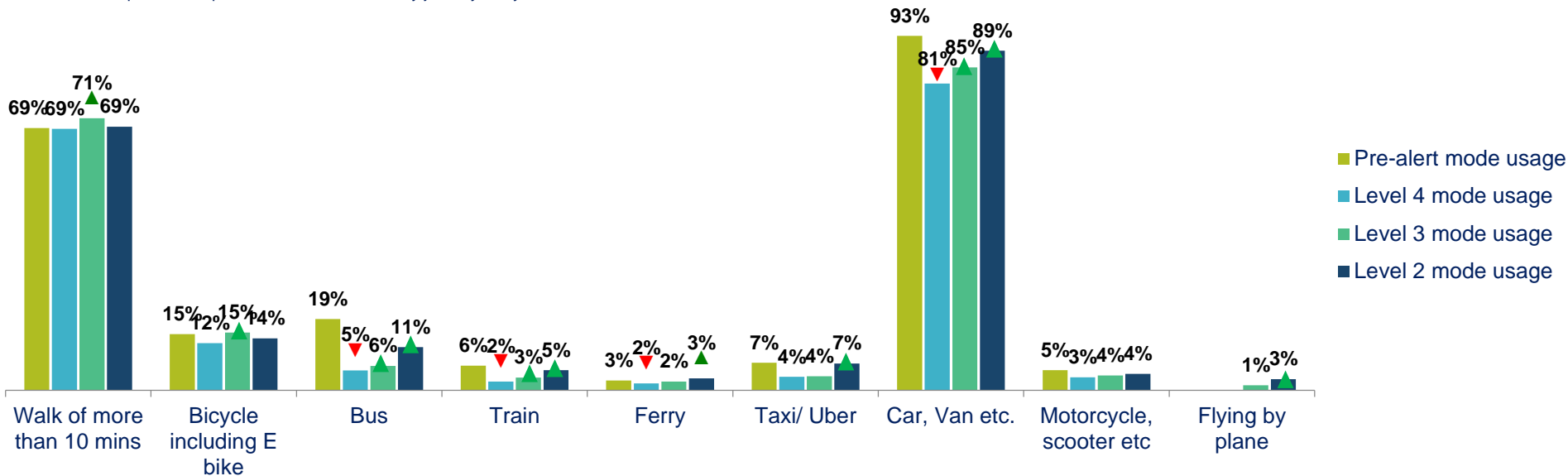
Base: all adults 15+ in New Zealand in Pre-alert level: (n=3,759); level 4 (n=5,060); level 3 (n=2,352); Level 2 (n=2,527)



All public transport modes have seen significant usage increases in level 2, but the proportion using a car at least once a week is almost back to normal levels

Modes used in a normal week vs used in past week by alert level

NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.
NETT of public transport includes bus, train, ferry journeys only



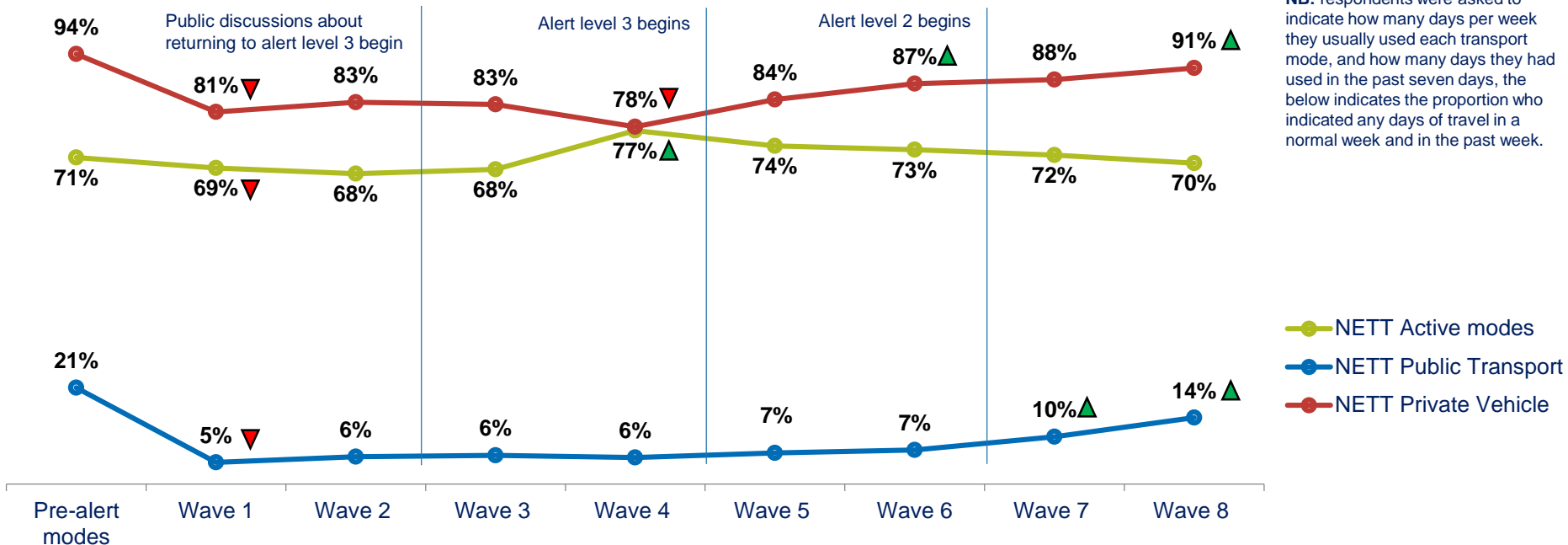
QFREQ1/QFREQ2 –And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below?

Base: all adults 15+ in New Zealand in Pre-alert level: (n=3,759); level 4 (n=5,060); level 3 (n=2,352); Level 2 (n=2,527)



The proportion using public transport at least once a week has now doubled since the final wave under level 3 conditions

Changes in mode usage by wave

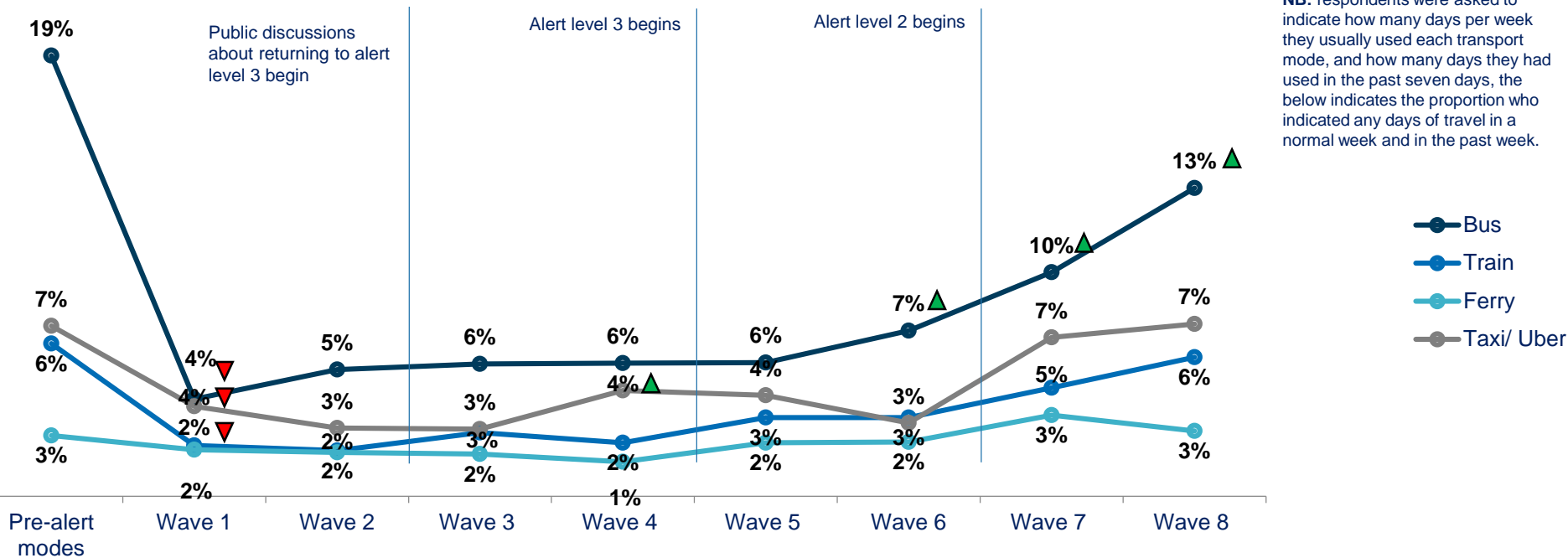


NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.

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 (e.g. in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264)

Even if the number of trips made has not returned to normal, the proportion using taxis and trains at least once a week is now at pre-lockdown levels

Modes used in a normal week vs used in past week by wave

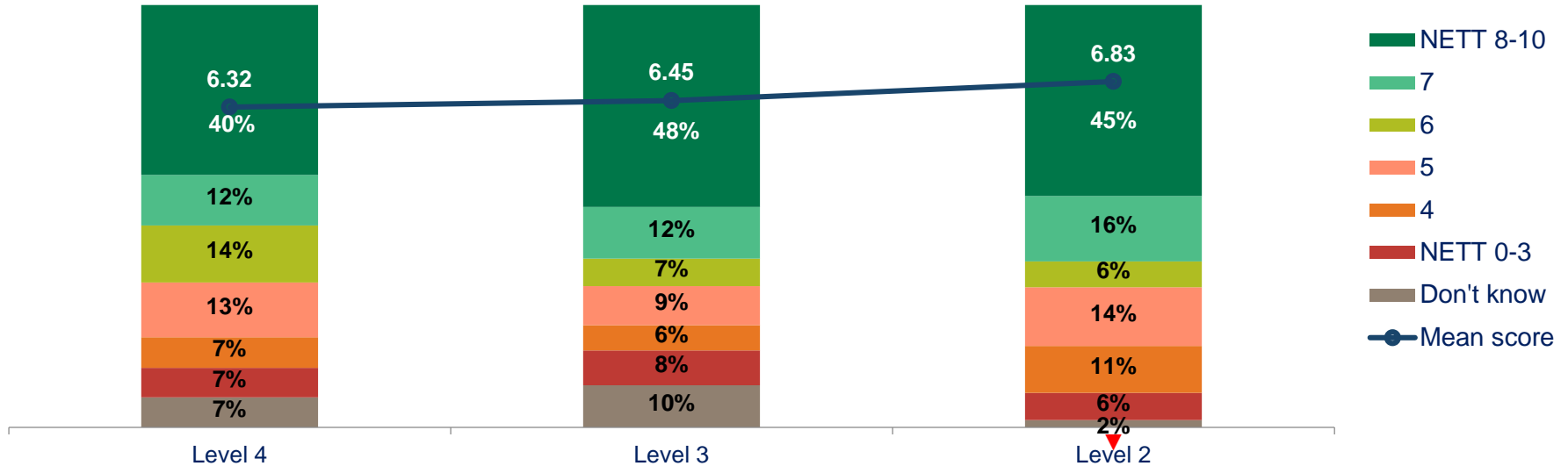


NB: respondents were asked to indicate how many days per week they usually used each transport mode, and how many days they had used in the past seven days, the below indicates the proportion who indicated any days of travel in a normal week and in the past week.

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 (e.g. in February this year)? And which, if any of the following types of journeys did you make *during the last seven days*? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 (n=1,264); Wave 2 (n=1,263); wave 3 (n=1,232); wave 4 (n=1,301), wave 5 (n=1,267), wave 6 (n=1,265), wave 7 (n=1,263), wave 8 (n=1,264)

Among those still using public transport, satisfaction has been gradually climbing as alert levels have been relaxed

Satisfaction with public transport by current alert level



QPTUSE1. How satisfied are you with the current provision of public transport?

Base: New Zealanders who have used public transport in the past seven days; level 4 (n=234), level 3 (n=141), level 2 (n=262)



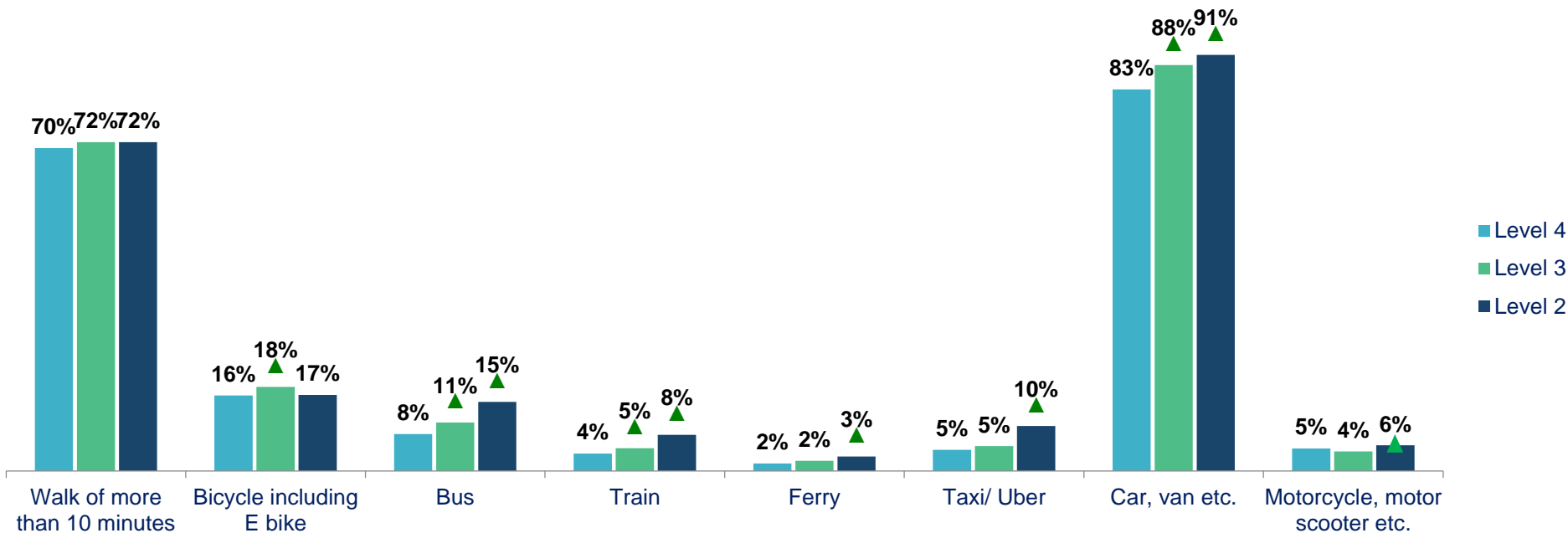
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

As restrictions have been relaxed through the alert levels, the proportion considering public transport modes has grown significantly

Mode consideration: coming week by alert level



QPT2. If available next week, which if any of the following would you be likely to use?

Base: all adults 15+ in New Zealand who normally travel;



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

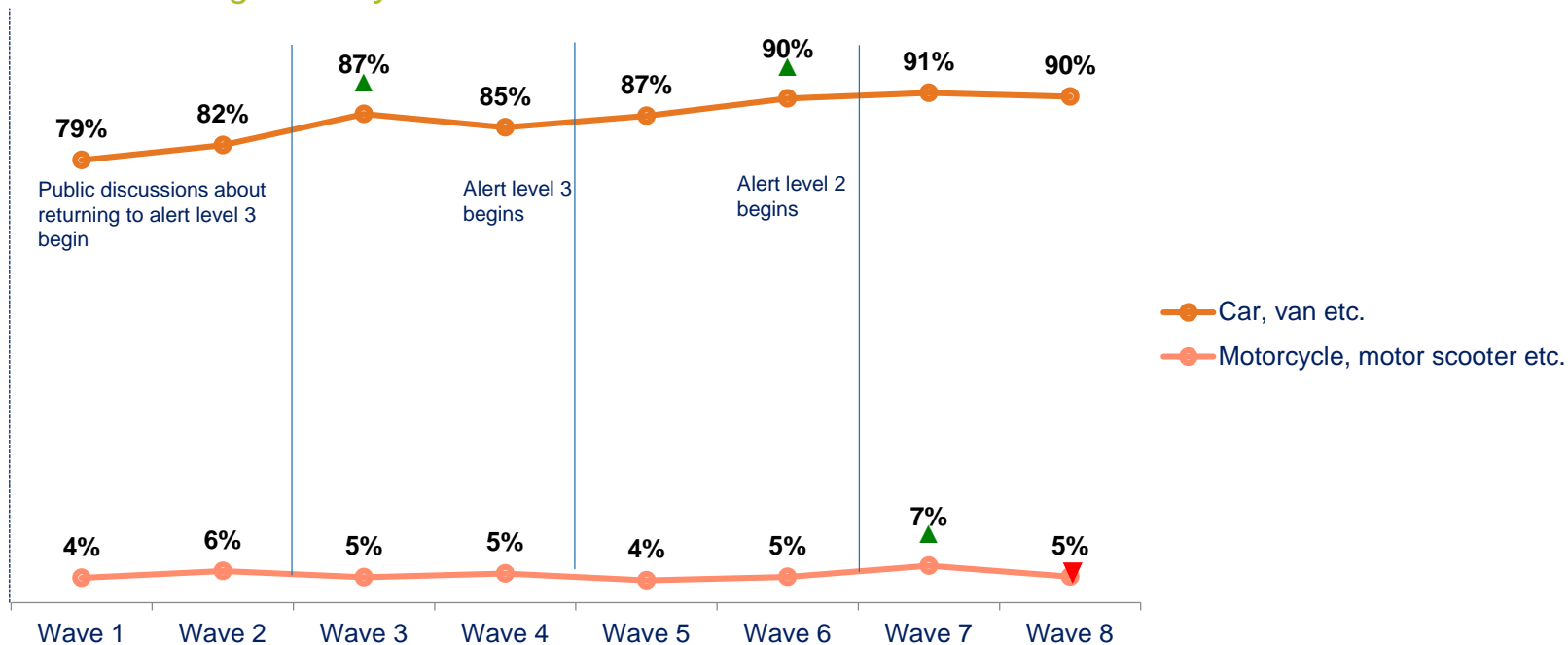
Car usage consideration has remained consistent since the end of level 3, although it hasn't yet matched the proportion using their car pre-lockdown

Mode consideration: coming week by wave

Pre-alert usage

Car ●
(93%)

Motorcycle ●
(5%)



QPT2. If available next week, which if any of the following would you be likely to use?

Base: all adults 15+ in New Zealand who normally travel;



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The start of level 2 saw a significant step change in public transport consideration, but this momentum hasn't continued in the second level 2 week

Mode consideration: coming week by wave

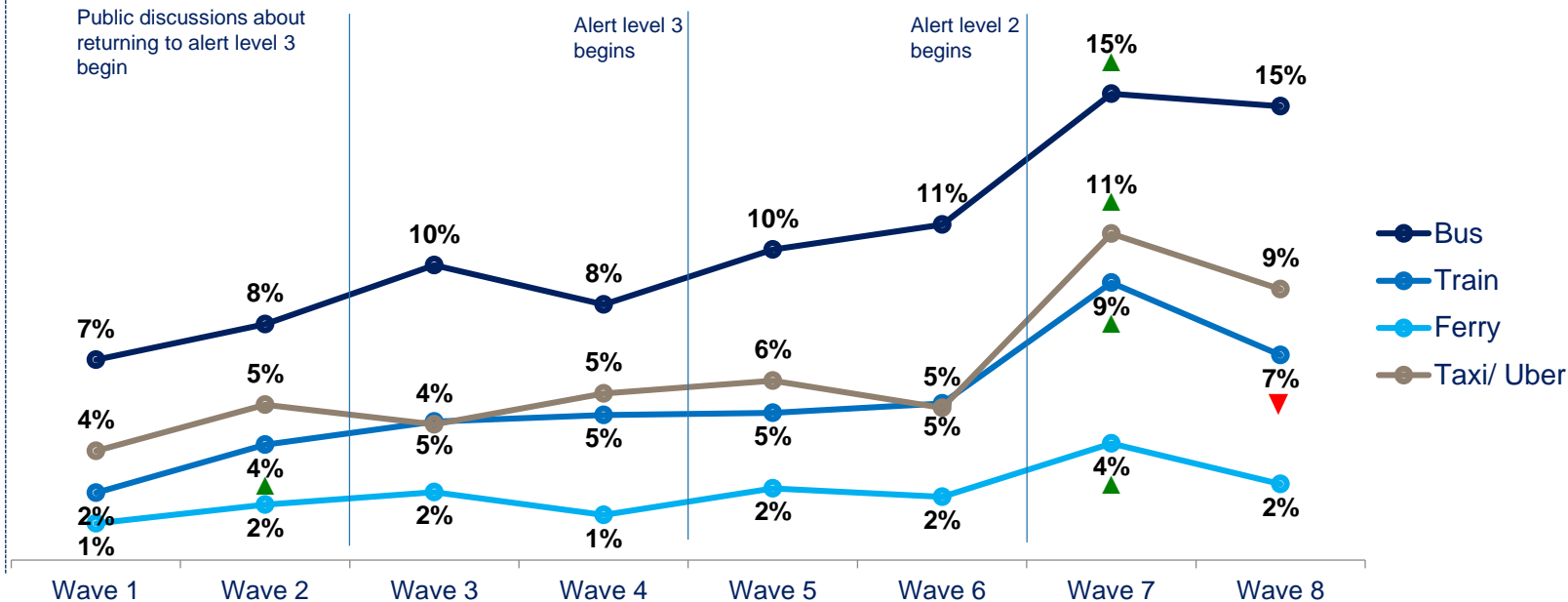
Pre-alert usage

Bus ● (19%)

Taxi/Uber ● (7%)

● Train (6%)

Ferry ● (3%)



QPT2. If available next week, which if any of the following would you be likely to use?

Base: all adults 15+ in New Zealand who normally travel;



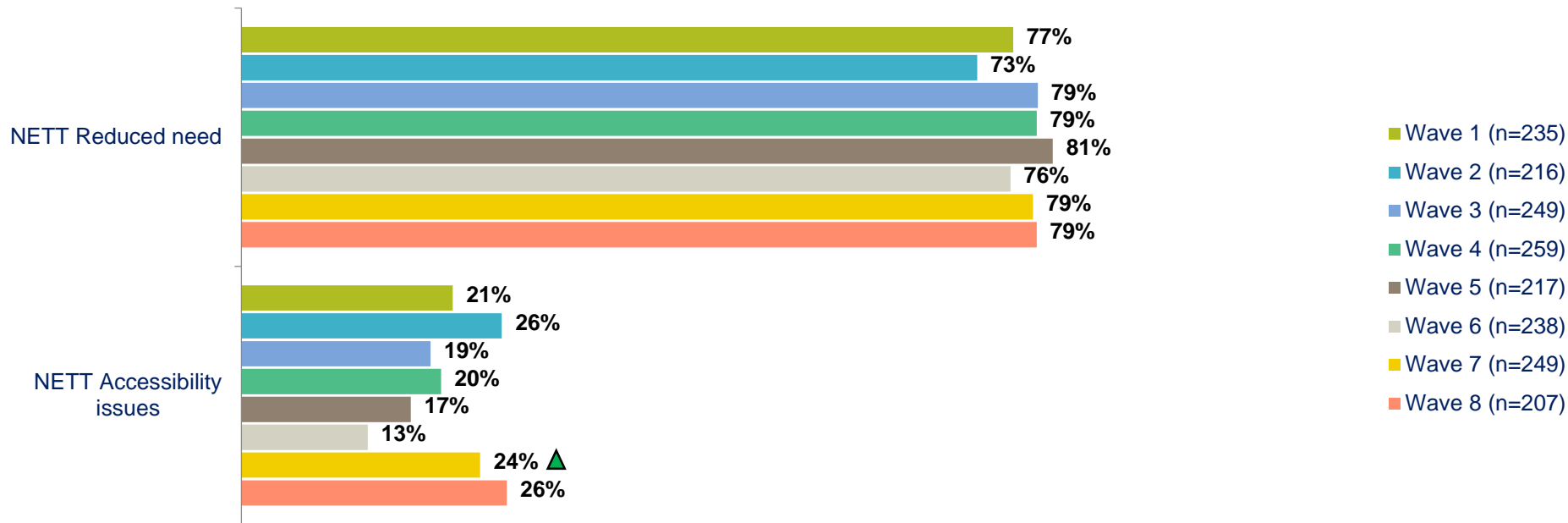
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The proportion citing accessibility issues as reasons for using public transport less has continued to climb in level 2

Reasons for reduced reported public transport usage in past seven days

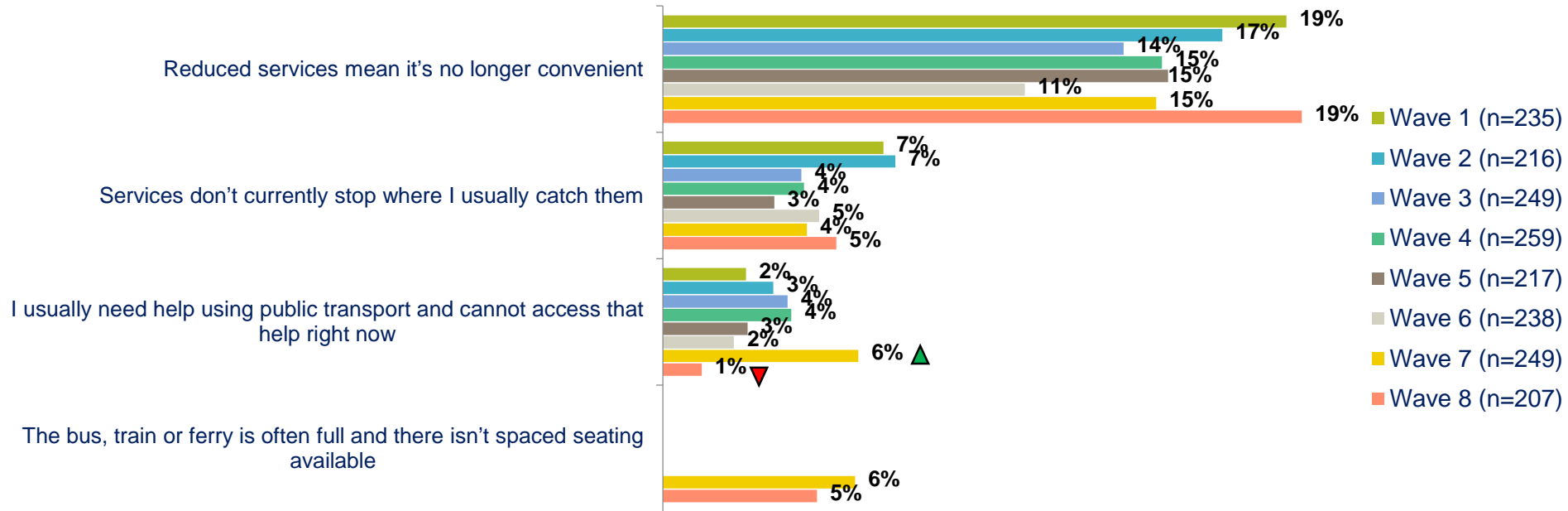


QDEC. Reasons for decrease in public transport activity - For which, if any of the following reasons, has your use of public transport decreased?
Base: all decreasing public transport usage in past week



The primary accessibility issue cited in wave 8 is reduced services

Reasons for reduced reported public transport usage in past seven days



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



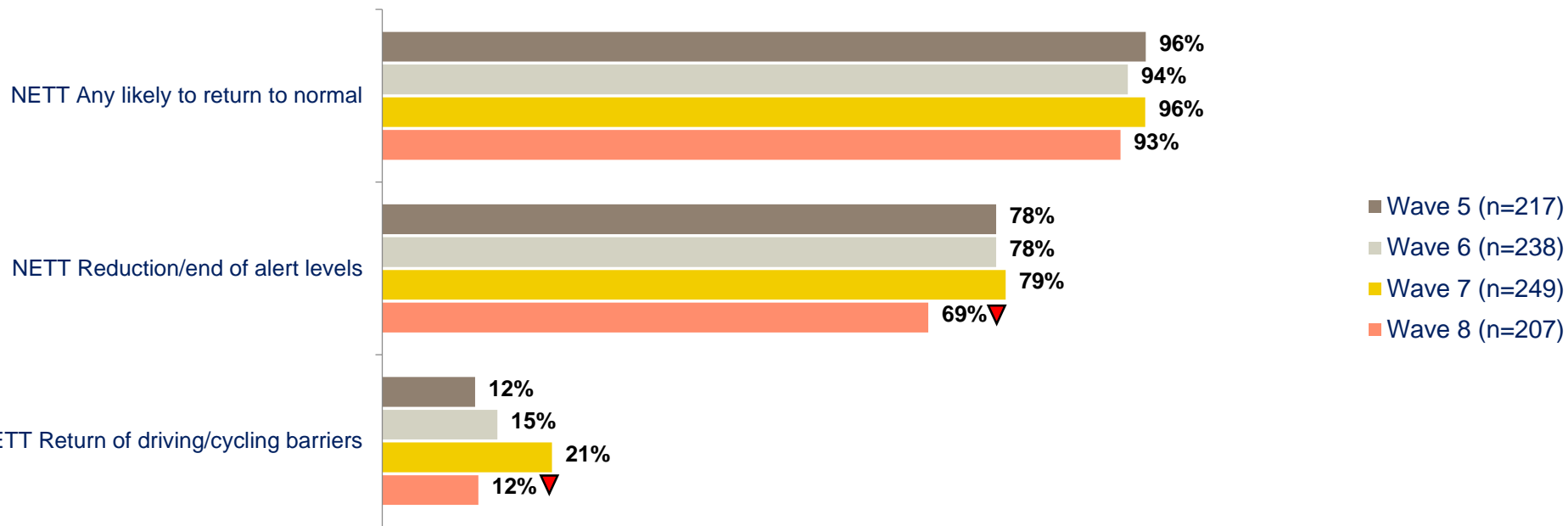
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The proportion citing reduced alerts as a trigger for returning to public transport has dropped off significantly in wave 8

Triggers for return to public transport

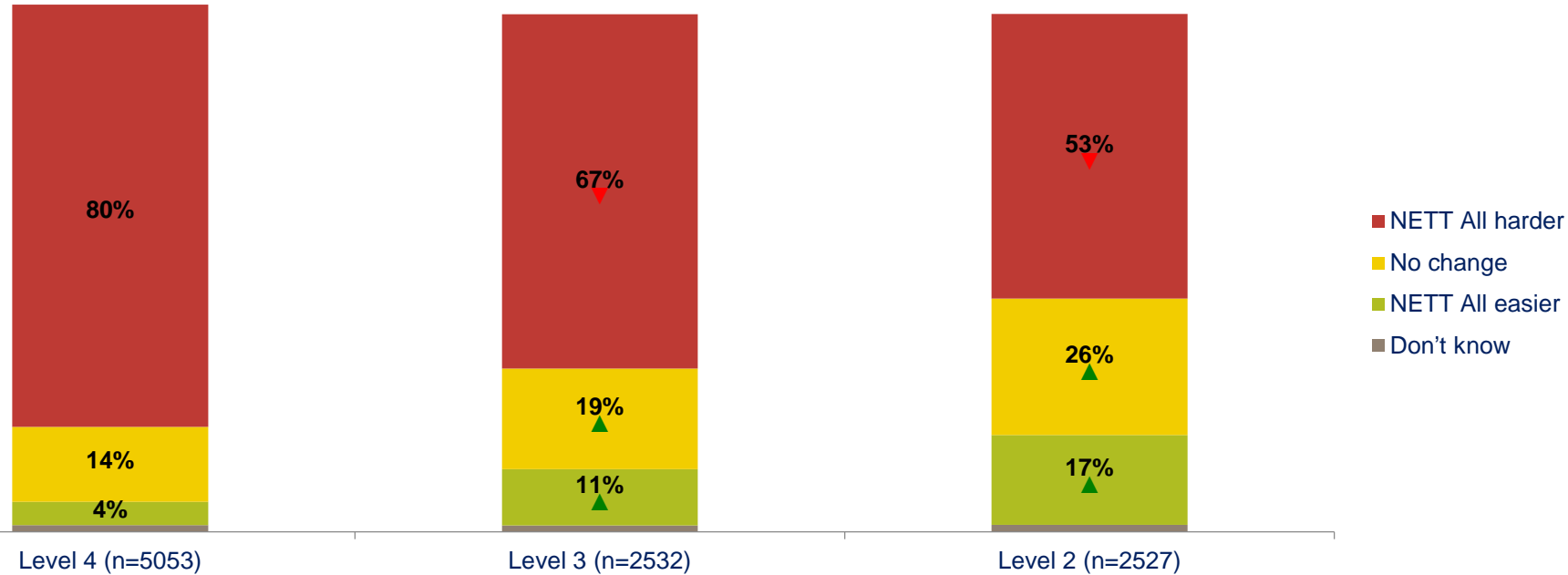


QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?
Base: all in wave 5 decreasing public transport usage in past week



As alert levels have decreased, the proportion finding shopping more challenging than before has steadily decreased

Relative difficulty of shopping in past week by alert level



QSH2A. Shopping ease percentages - To what extent has shopping for the groceries and household essentials that you need been easier or harder during the past week than it was prior to any public health alert or lock down?

Base: all adults 15+ in New Zealand



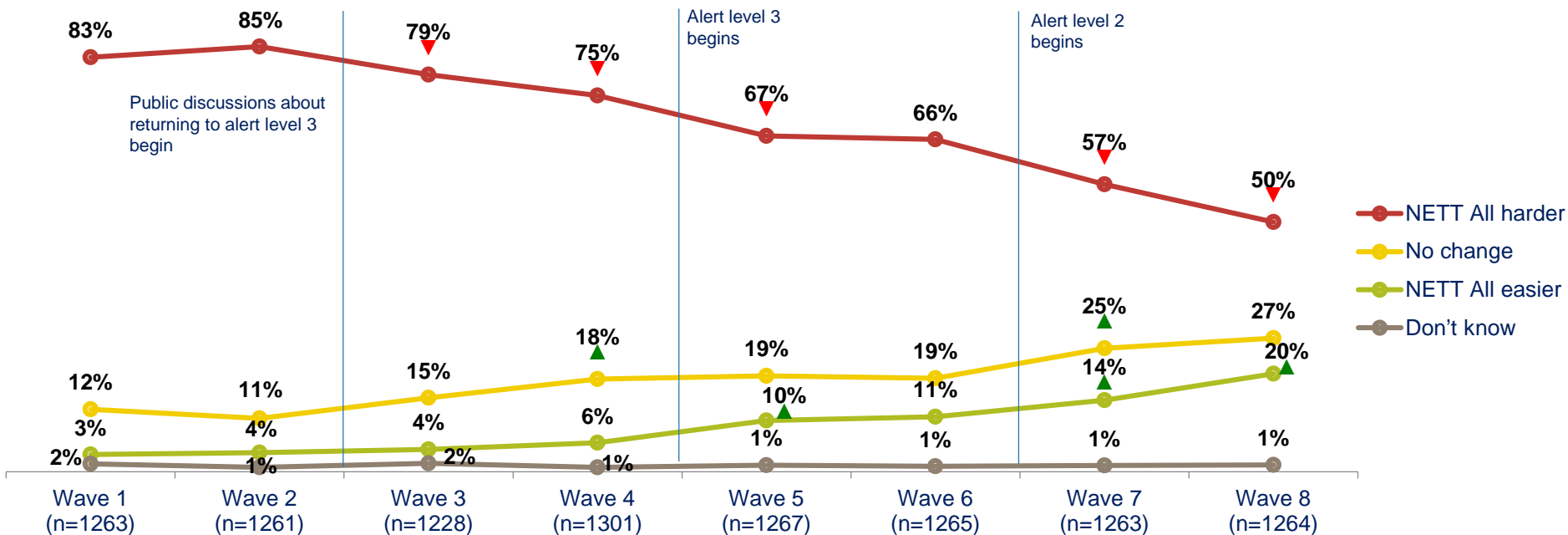
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

At this point, one in five New Zealanders say that shopping this week is *easier* than it was before any public health alert or lockdown

Relative difficulty of shopping in past week by survey wave



QSH2A. Shopping ease percentages - To what extent has shopping for the groceries and household essentials that you need been easier or harder during the past week than it was prior to any public health alert or lock down?

Base: all adults 15+ in New Zealand





Section 4 – Non-essential and domestic journeys

Key findings – non-essential and domestic journeys

Waka Kotahi objective – how is non-essential & domestic travel changing?

- To understand how travel is changing across the COVID-19 risk levels and how COVID-19 may drive shifts in the modes of transport used, we have begun to measure non-essential journeys, and the ways domestic inter-regional travel is being taken up in level 2.
- One in five say that they are not taking any non-essential journeys at all, compared to just 1% before alert levels were introduced.
- Shopping for non-grocery items is the most common non-essential journey undertaken, followed by visits to friends and family.
- Visiting friends and family is the biggest inter-regional journey, with over one in four people saying they have done this in the past week.

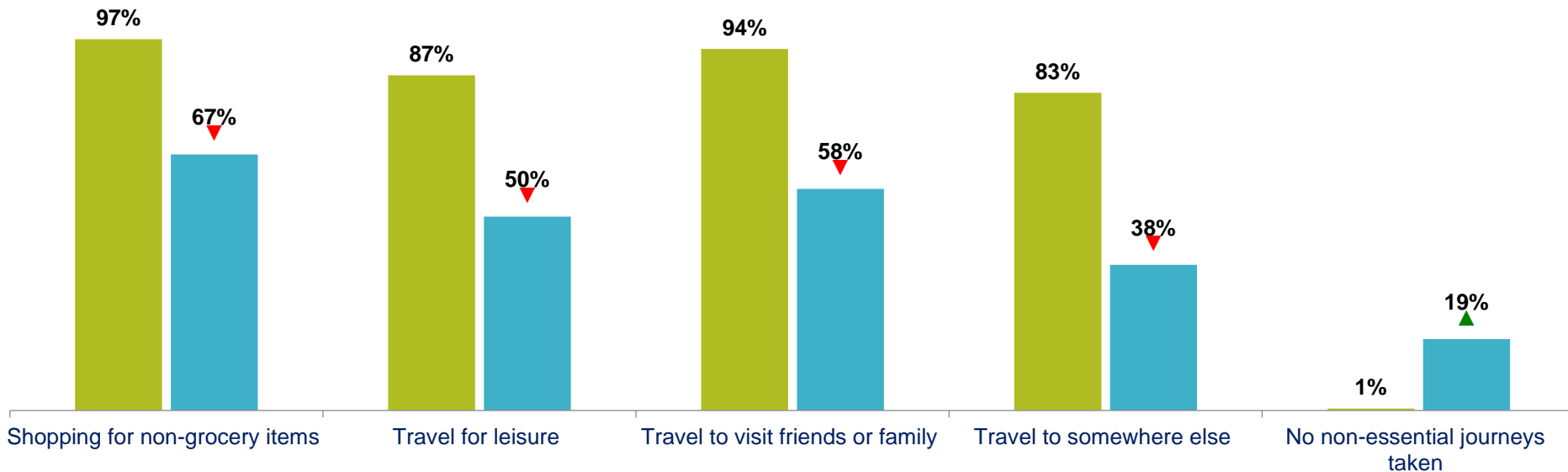


Even though non-essential journeys became somewhat easier in level 2, the proportion taking them is still significantly lower than it was before lockdown

Non-essential journeys

Usual journey behaviour

Past week journey behaviour



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 in New Zealand (n=2,527)



Indicates a statistically significant increase against normal week behaviour

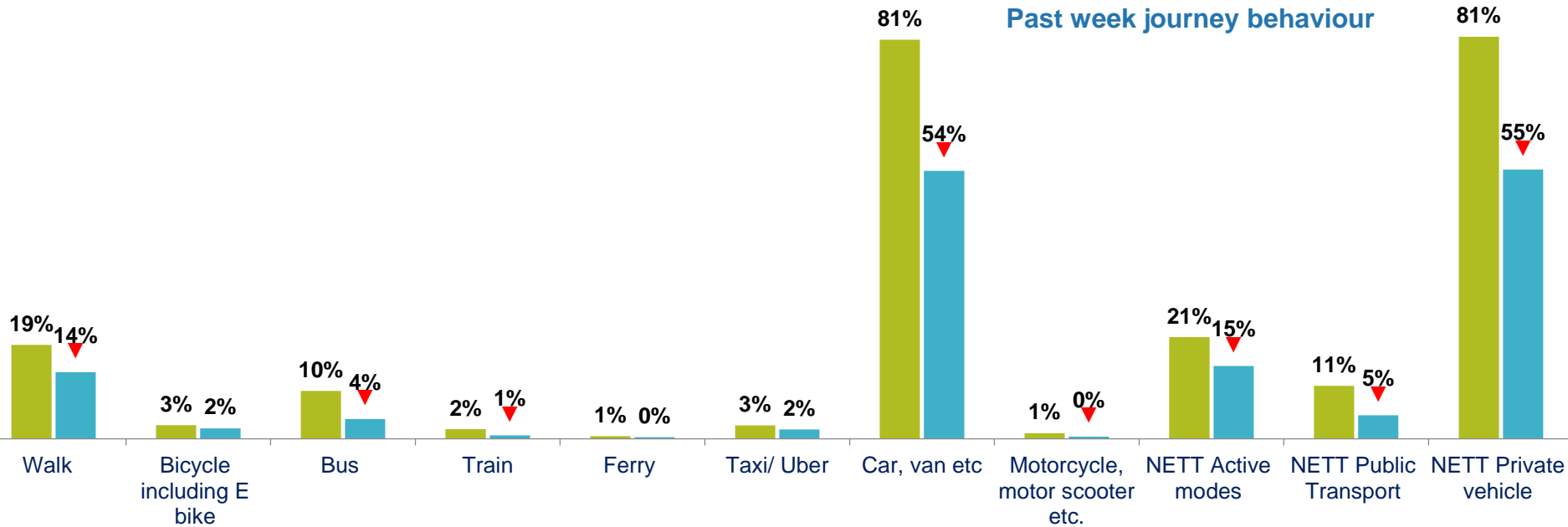


Indicates a statistically significant decrease against normal week behaviour

The car is the most commonly used mode for non-grocery shopping, although the reduction in all modes is a feature of a reduction in this activity

Mode usage: shopping for non-grocery Items

Usual journey behaviour
Past week journey behaviour



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.

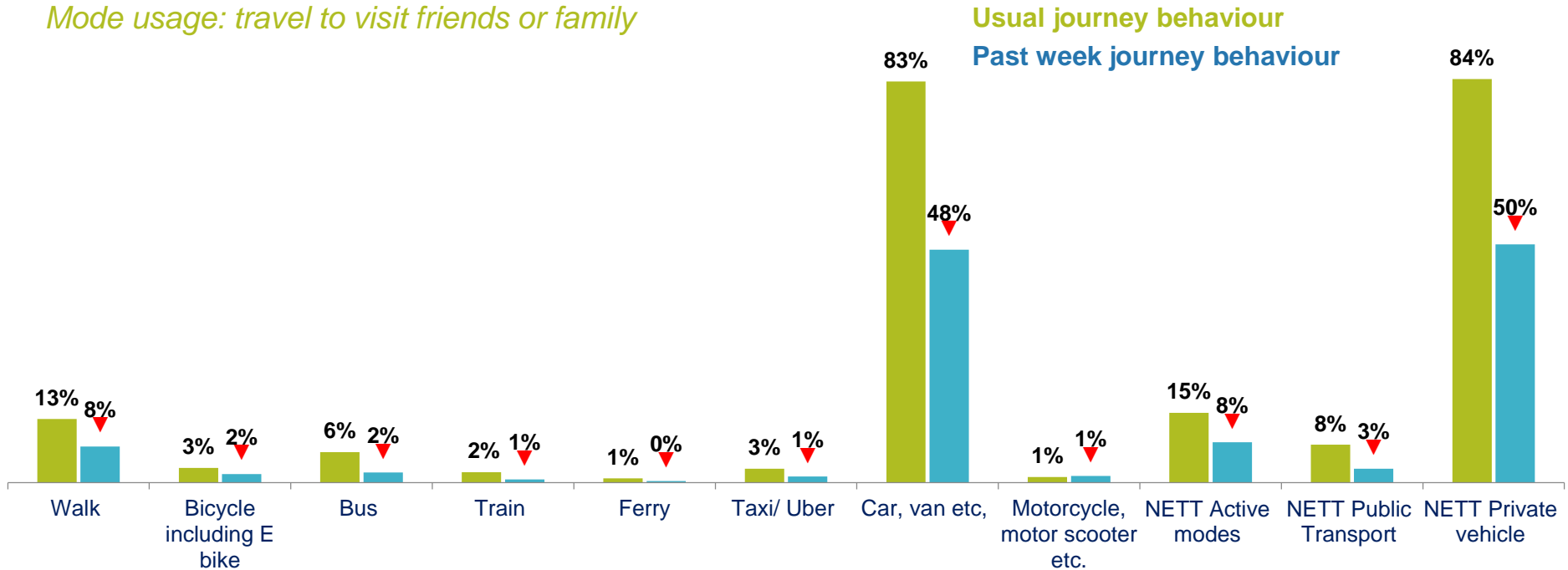
How, if at all did you make each of the journeys listed below in the past seven days?

Base: all adults 15+ interviewed during level 2 in New Zealand (n=2,527)



This is also true for visiting friends and family, and in general, people tend to use cars for non-essential local travel

Mode usage: travel to visit friends or family



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?

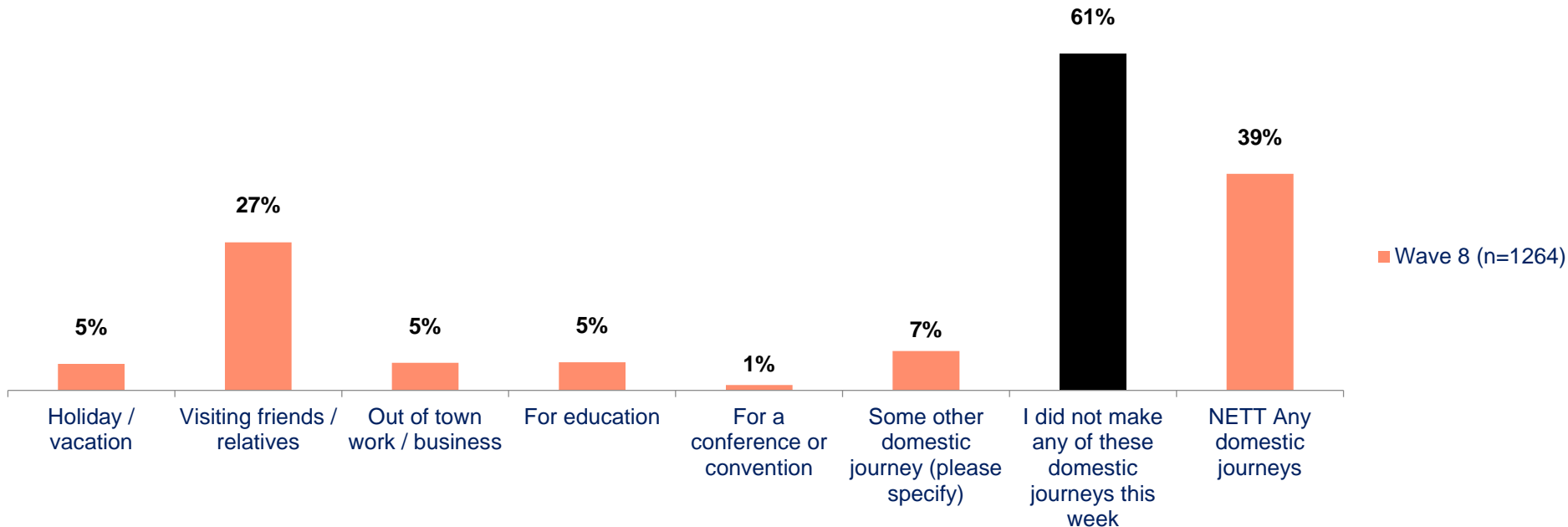
Base: all adults 15+ interviewed during level 2 in New Zealand (n=2,527)



When it comes to travelling further, the most common cause of inter-regional travel is visiting family or friends, although three in five made no domestic journeys of this nature

Domestic journeys in the past seven days by wave

NB: Some reporting work travel in wave 7 may be including normal commutes within their answers and as such, the question is changed from wave 8 onwards



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+ in New Zealand in wave 8





Section 5 – Perception of transport modes

Key findings – perceptions

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

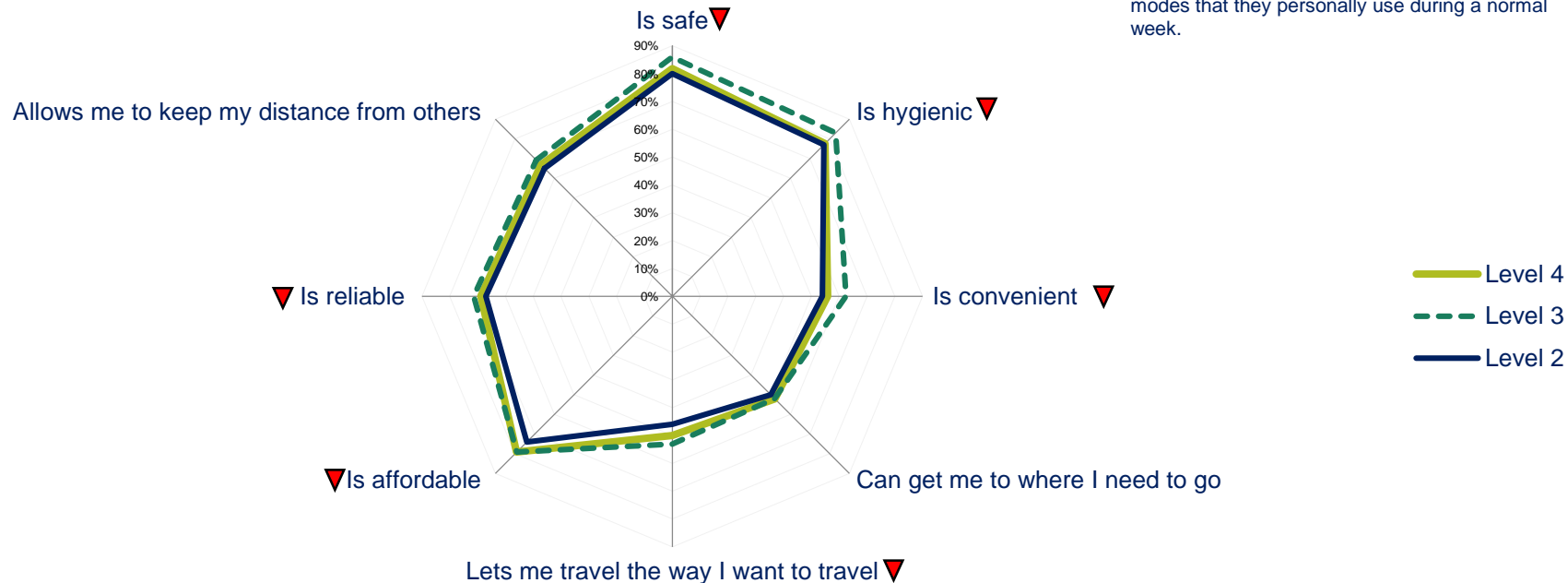
- The COVID-19 environment may over time change the way that New Zealanders perceive different modes of transport. This will be important to understand as these perceptions may impact people’s travel patterns and behaviour.
- After peaking during level 3, perceptions of active modes have declined as more and more people have begun to resume their normal travel patterns in level 2.
- While perceptions are still largely positive for walking and cycling, they are more akin to those recorded in level 4.
- Public transport modes continue to improve perceptions in some areas, with perceived safety improving for trains and hygiene improving for buses, which had previously been an area of weakness.
- However, they have seen decreases in other areas, particularly in reliability for trains.
- Perceptions of taxis and ubers are largely unchanged from level 3, which had been a marked improvement on their level 4 scores.



In level 3, positive perceptions of walking peaked, but have now returned to similar or lower levels than seen during level 4

Perceptions of walking

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



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who normally use walking as a means of travel: level 4 (n=1,445), level 3 (n=736); level 2 (n=829)

As with walking, there has been a reversion in perceptions of cycling as a transport mode during level 2

Perceptions of bicycle including e-bike

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

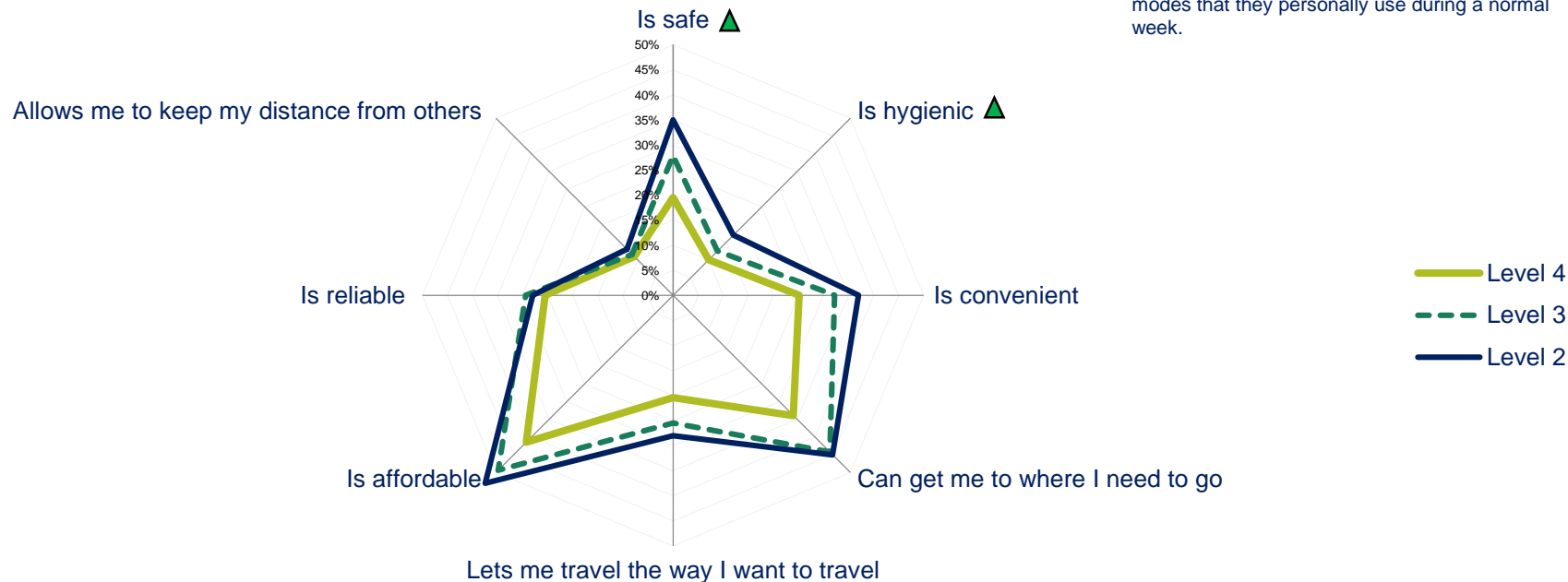


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by bike normally: level 4 (n=782), level 3 (n=419); level 2 (n=411)

Perceptions of buses have improved in some areas in level 2, most importantly in being seen as hygienic, an area where the bus has struggled in terms of perceptions

Perceptions of the bus

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

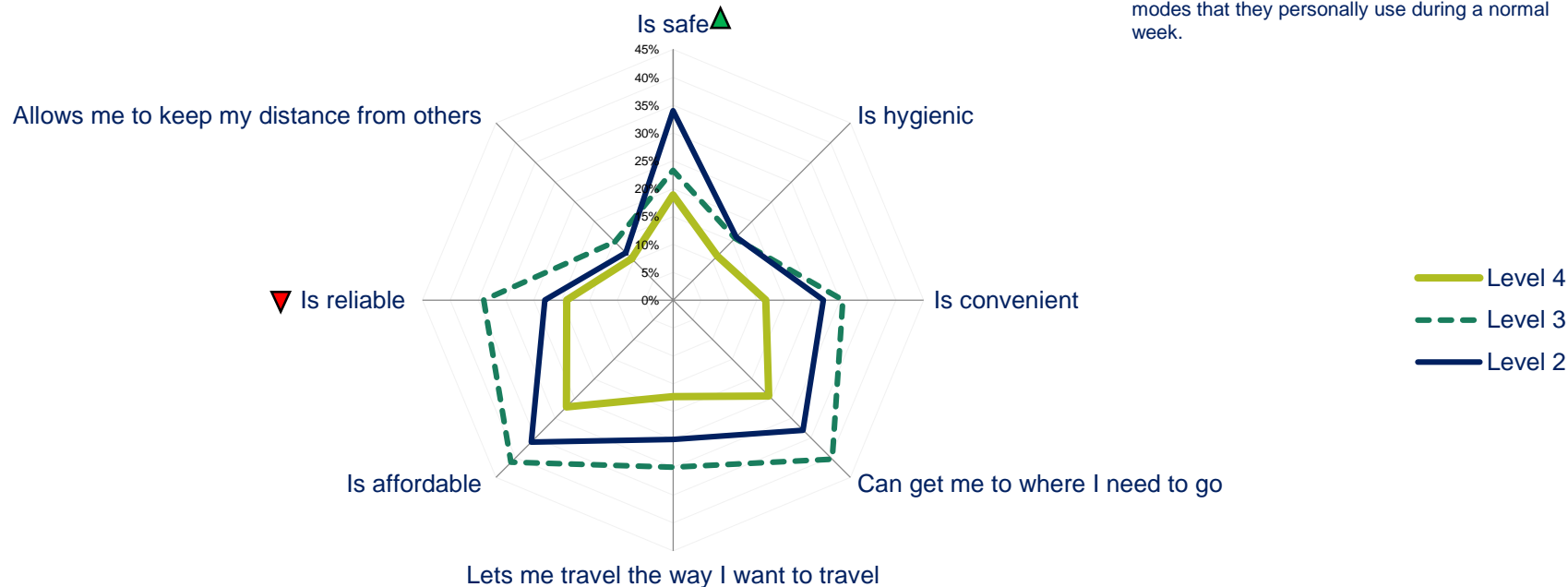


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by Bus normally: level 4 (n=943), level 3 (n=452); level 2 (n=509)

Level 2 has seen a mix of changes in perceptions of trains, with perceived safety increasing significantly at the same time that reliability has fallen

Perceptions of the train

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

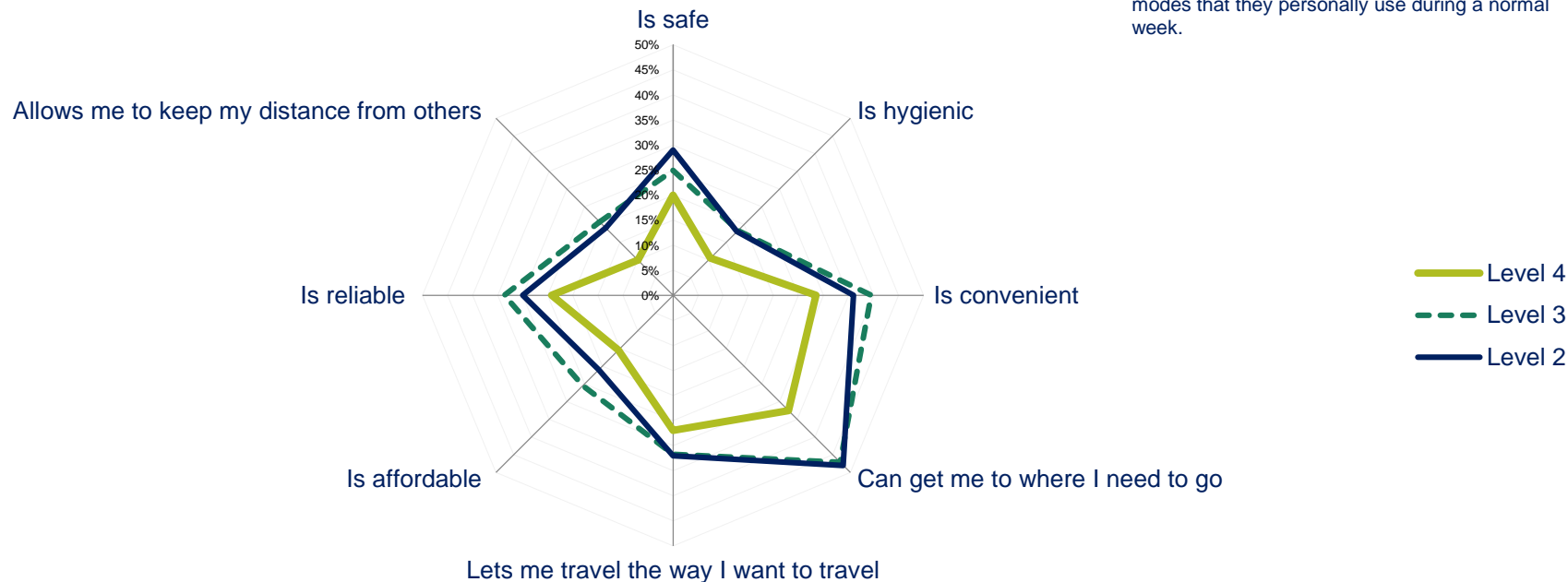


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by train normally: level 4 (n=323), level 3 (n=160); level 2 (n=225)

Perceptions of taxis and ubers have remained stable in level 2, following substantial improvements during the shift from level 4 to level 3


Perceptions of taxi / uber

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



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who normally travel by Uber / Taxi: level 4 (n=355), level 3 (n=164); level 2 (n=235)





Section 6 – Attitudes leading to transport behaviour change

We use an holistic model of understanding how to influence behaviour change

COVID-19 tracker MAPPS questions

MAPPS DIMENSION	MAPPS CATEGORY	WHAT IT MEANS	STATEMENT IN QUESTIONNAIRE
Motivation	Outcome expectations	I don't think it will work	Making changes to the way we get around will reduce the impact of COVID-19 on NZ
	Internalisation	I don't want to do it	I am personally very committed to following current travel/movement restrictions
	Self-efficacy	I don't feel able to do it	I don't feel able to get where I need to go
	Identity	I'm not that kind of person	I am not the type of person who would take a trip that is discouraged under the current alert level
	Emotion	I do not feel like doing it	Leaving the house worries me I worry about how I'm going to get the things I need
Ability	Capability	I am not able to do it	At the moment it's very hard to work out how to get to the places I need to go I feel confident I know what travel restrictions are in place when it comes to leaving the house
	Routines	It's not part of what I usually do	My daily travel routines are disrupted at the moment
Processing	Decision forces	How things are processed	I trust my own judgement when it comes to deciding when I go out and where I go
Physical	Structural factors	How things are set up	I can easily get to the places I need to go
Social	Cultural norms	The way we live	New Zealanders are looking out for each other by following current restrictions on travel/movement
	Social norms	The kind of thing expected of us	Most people are following the guidance around what journeys they can take

Key findings – attitudes

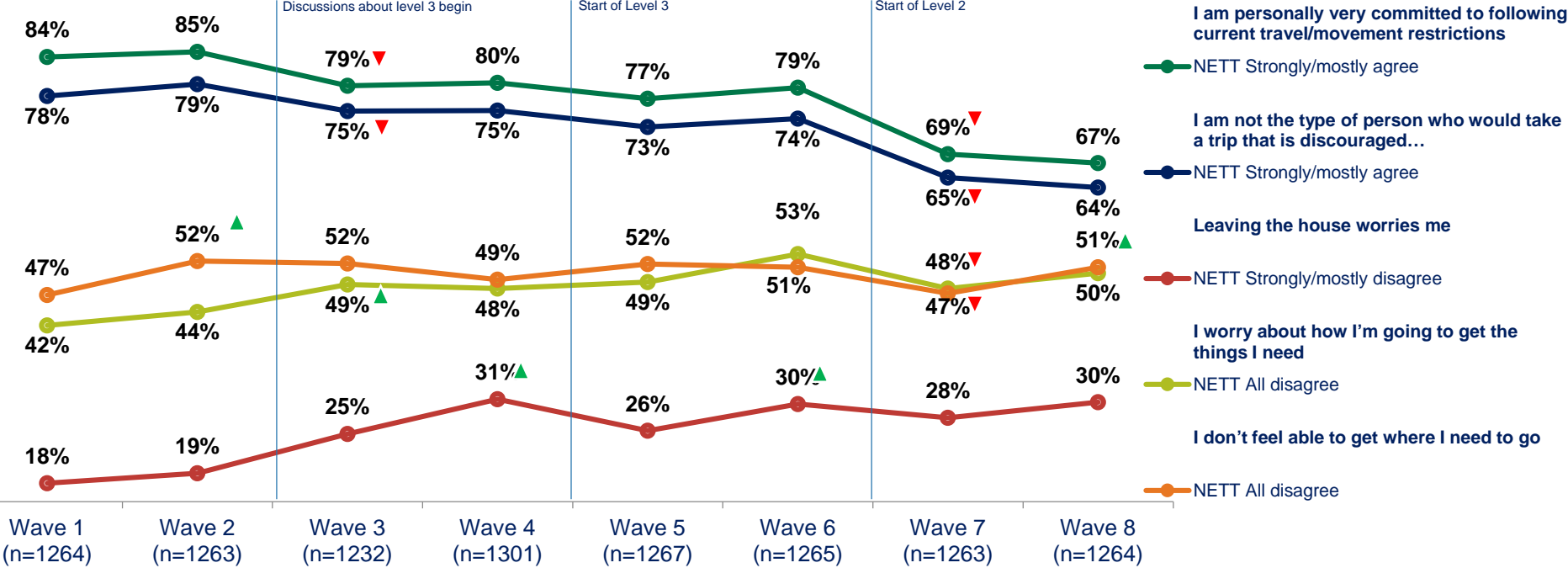
Waka Kotahi objective – understanding behaviour change

- This research has shown that journey patterns are changing somewhat as we adjust to level 2 conditions, so it is important to understand the prevalence of certain attitudes in this environment and how those might drive behaviour.
- Buy-in to lockdown conditions has significantly softened over time, with commitment and self-projection lower in the second week of level 2 than recorded so far.
- Outcome expectation is also at its lowest level, further indicating that motivation to adhere to travel restrictions is waning.
- In line with this, there is a sense of a return to normal as the proportion feeling their travel routines are disrupted has dropped from half in the first week, to just 20% this week.
- Social indicators have also continued to decline in line with motivation, as constraints on people's travel patterns are relaxed in level 2.
- However, there has been a sharp decrease in the trust people have in their own judgment about travelling around, potentially indicating some hesitance or confusion.



Most motivation factors saw a significant decrease at the start of level 2, with the statements testing buy-in at the lowest level seen so far

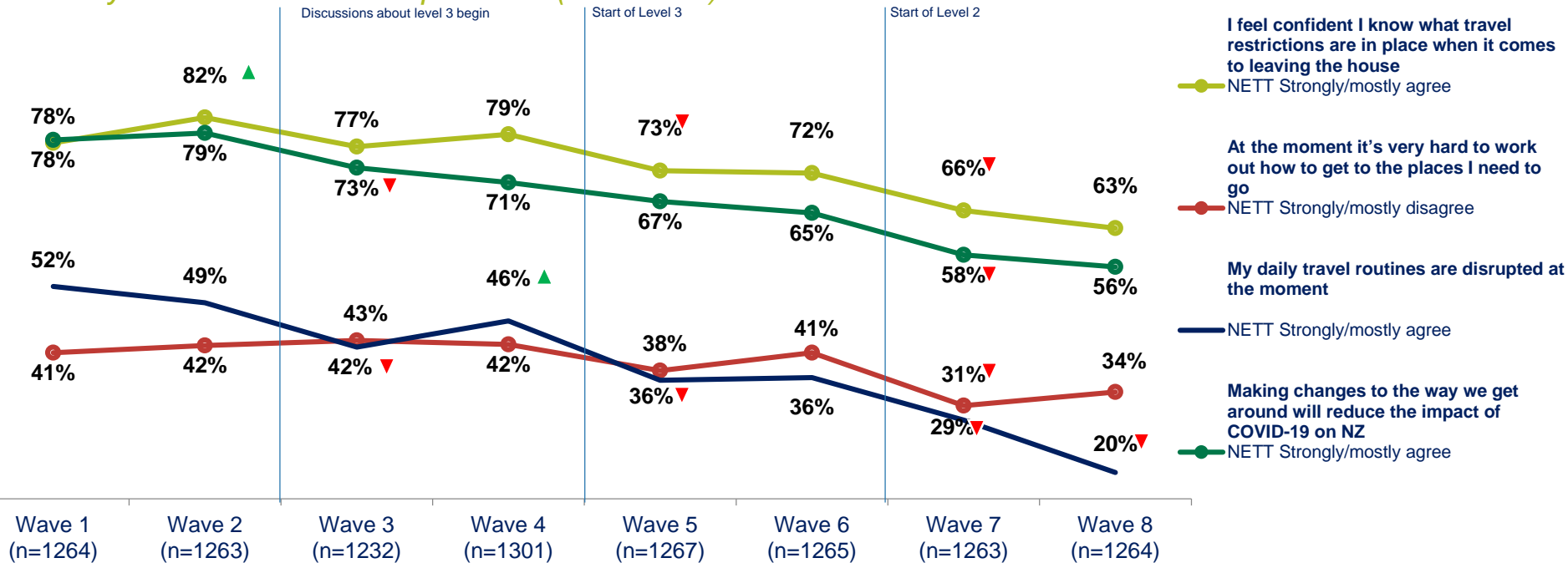
Motivation factors



QATT: Thinking about recent events and the Covid-19 pandemic in general. To what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand

The proportion agreeing that their routines are disrupted is down to one in five, whereas half agreed at the start of level 4; confidence continues to decline

Ability factors + outcome expectation (motivation)



QATT: Thinking about recent events and the Covid-19 pandemic in general. To what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand



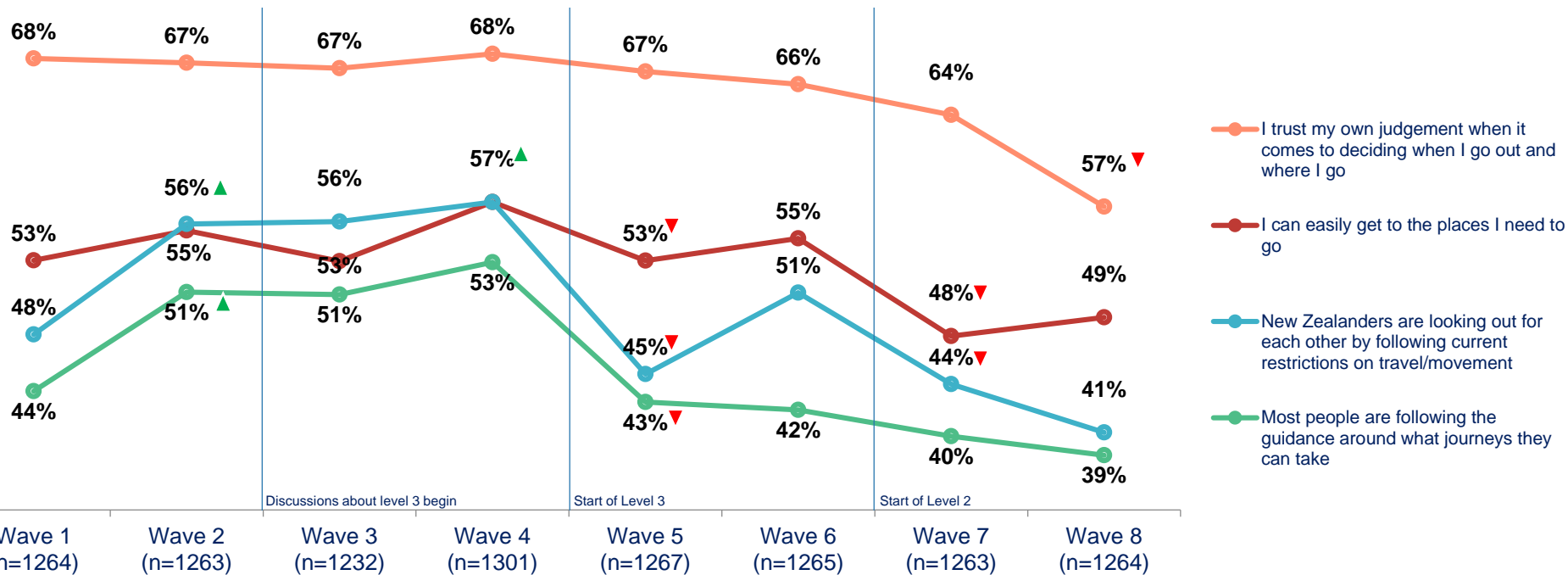
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

In the second week of level 2, the proportion trusting their own judgment declined significantly, both social factors are now at their lowest level

Processing, physical and social factors (NETT strongly / mostly agree)



QATT: Thinking about recent events and the Covid-19 pandemic in general. To what extent do you agree or disagree with the following statements?

Base: all adults 15+ in New Zealand



The background image shows a person in a dark jacket and hat walking on a path, and two cyclists riding past. The scene is outdoors with trees and a bright sky. A diagonal blue overlay covers the top right portion of the image.

Section 7 – Future domestic tourism

Key findings – future domestic tourism

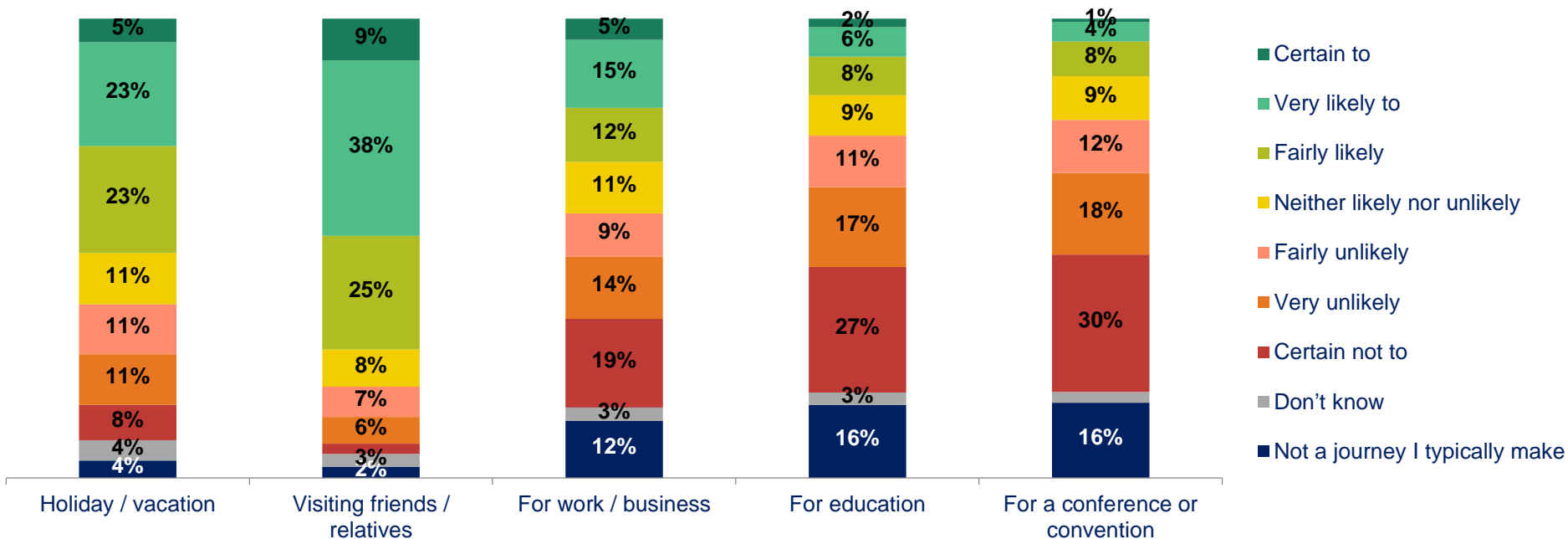
Waka Kotahi objective – how will domestic tourism change going forward?

- In light of restricted international travel, it is important to understand how domestic travel and tourism may change and impact New Zealand's travel infrastructure.
- Visiting friends and family is the big driver for inter-regional travel in the medium-term future, with 72% saying they are likely to travel for this reason and about half citing it as a reason for increasing their travel overall.
- While people are confident that they will travel domestically in the next six months, this doesn't translate into an anticipated increase in the volume of travel, more a reversion to the levels of travel they had before.
- In fact, taking into account those who feel they will travel less, the overall impact for most travel types is a net decrease during the coming half year.
- Affordability and concerns of COVID-19 transmission are the big barriers to travelling domestically going forward, whilst a desire to see friends and family is the biggest single driver of travelling more.



Travelling to visit friends and relatives are the big domestic tourism drivers for the next six months, nearly three quarters say they are likely to travel for this purpose

Likelihood to make domestic journeys

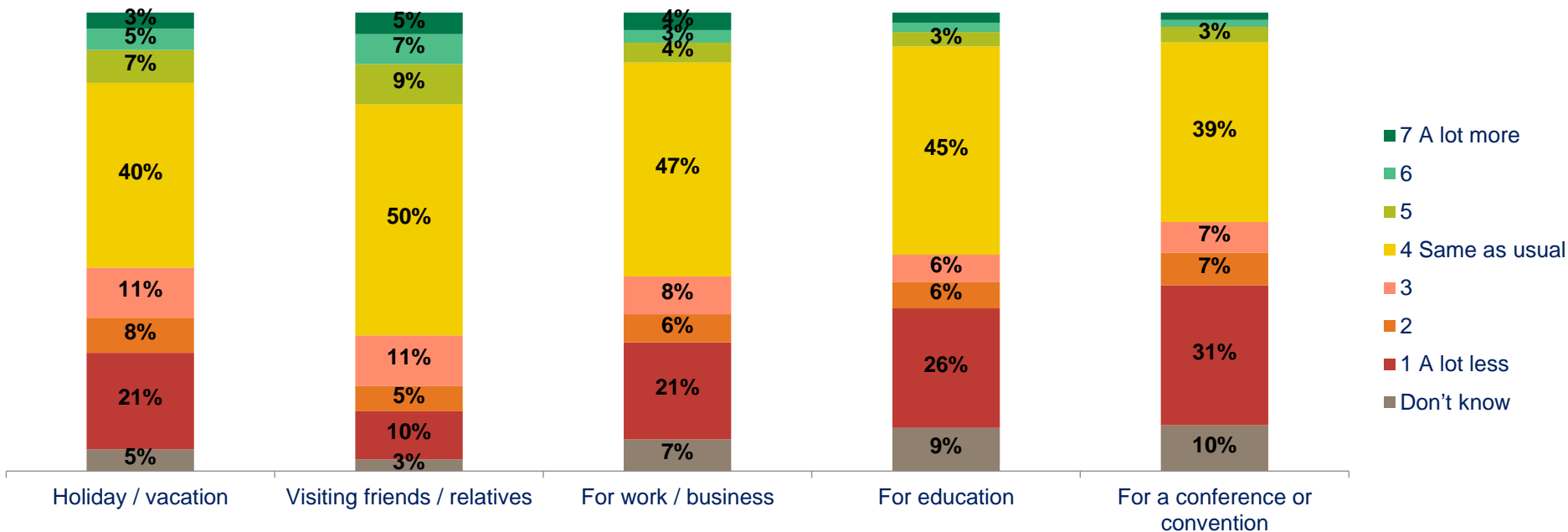


FDT1. How likely are you to make following types of domestic journeys in the next six months?

Base: all adults 15+ in New Zealand, Base: (n=1,264)

On balance, the majority of journey types seem likely to decrease in the coming six months, although half say they will travel as much as usual to see friends and family

Intention to travel domestically

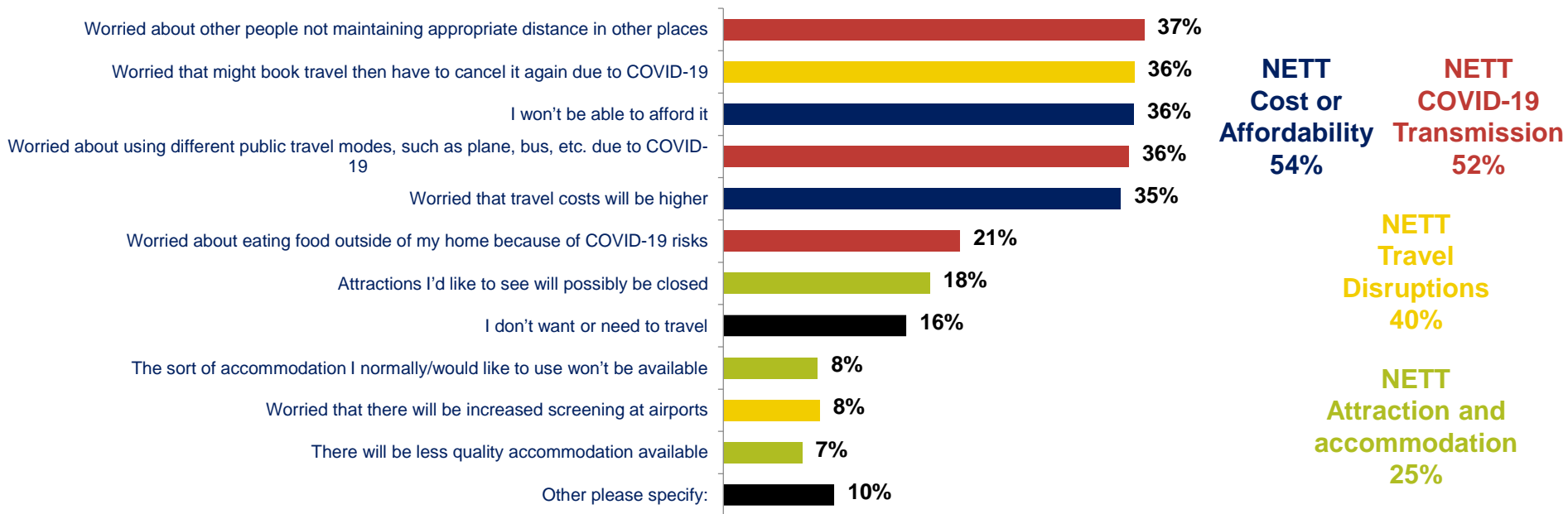


FDT2. We'd now like you to think about winter and spring 2020 and how your domestic travel will compare to the same period last year. Compared to the same period last year, do you intend to travel domestically more, less, or about the same amount for...

Base: all adults 15+ in New Zealand, Base: (n=2,527)

Cost issues and concerns about COVID-19 transmission are roughly equally cited as barriers to domestic tourism

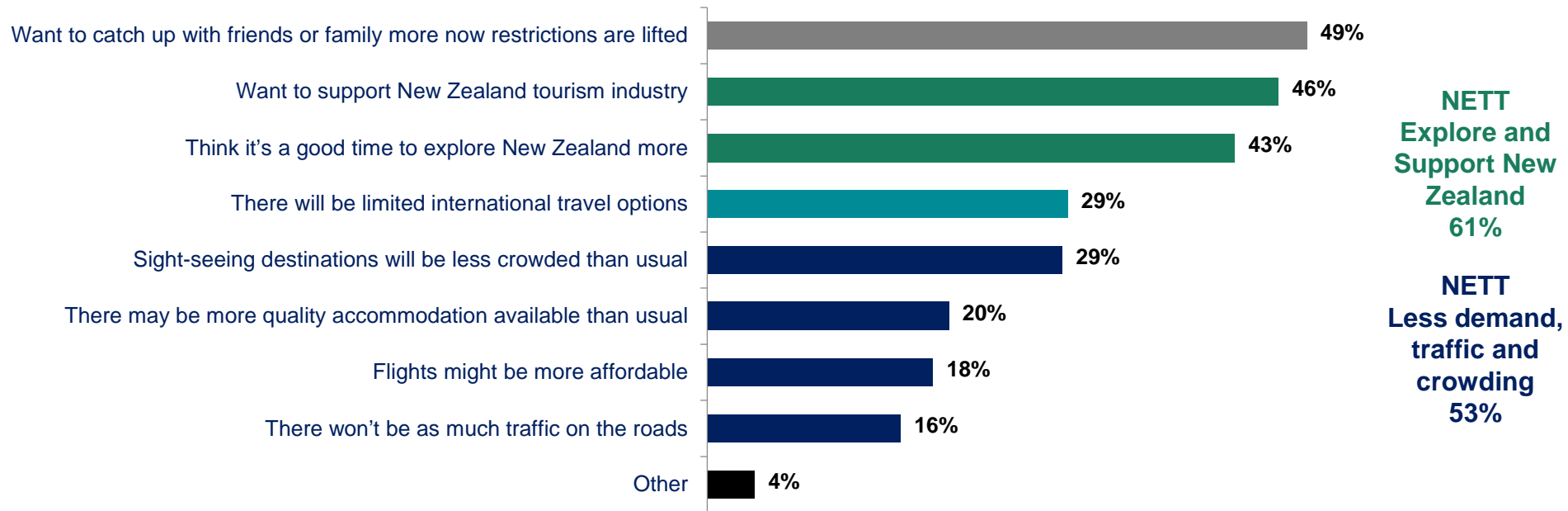
Reasons for travelling less



FDT3a. What are the main reasons that you intend to travel less?
 Base: all adults 15+ in New Zealand intending to travel less (n=1,587)

The key draw for tourism as for other journeys is social, with half intending to catch up with friends and family

Reasons for travelling more



FDT3b. What are the main reasons that you intend to travel more?
Base: all adults 15+ in New Zealand intending to travel more (n=722)



Section 8 – Returning to school

Key findings – returning to school

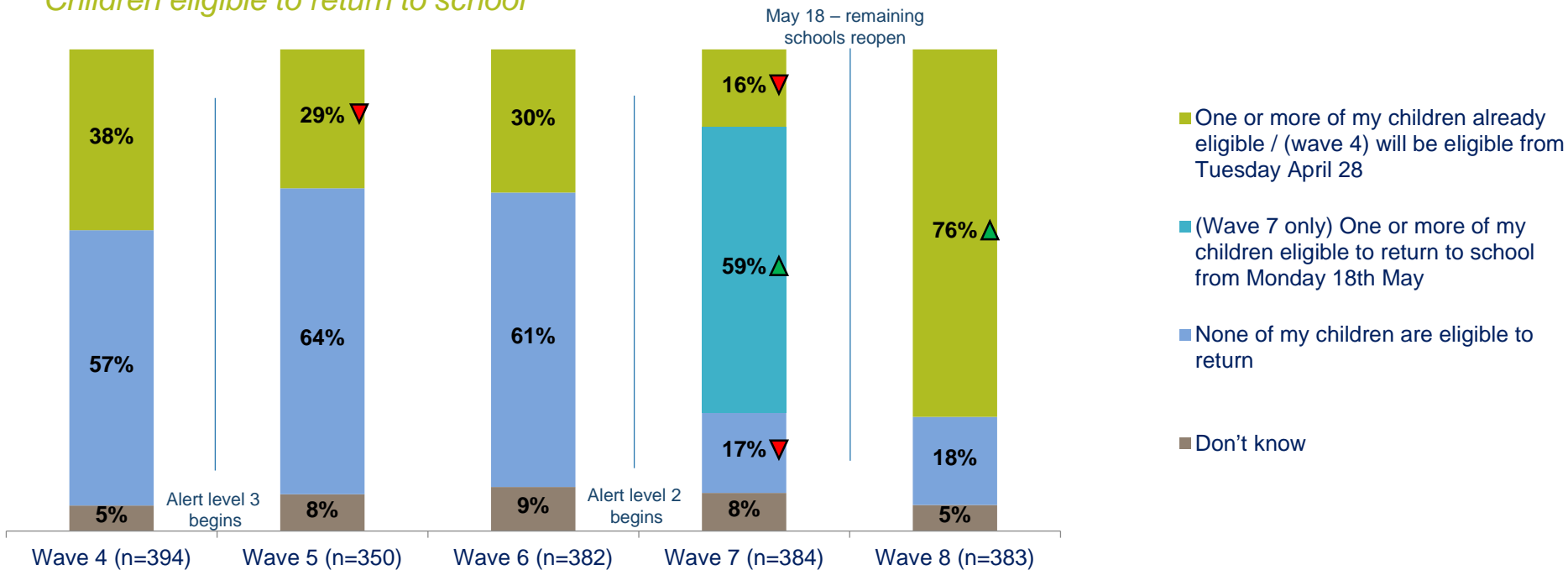
Waka Kotahi objective – how is travel changing?

- On 18 May, following the switch to alert level 2, all children were permitted to return to school or pre-school across New Zealand. It is important to understand how the intention to return is likely to impact daily traffic on our roads and rails.
- After the first full week under these conditions, three quarters of parents state that at least one child is eligible to return to school.
- Although the majority of these parents have sent children back to school, there remains one in five who say that none of their children have returned.
- Looking back at what parents have previously said about intention, the proportion who have returned their children to school is much greater than the proportion who were certain to do so in the preceding wave.
- At this stage, three in five parents have sent their children back to school so school-run traffic will not yet be at the normal level.



This week, three quarters of parents say their children are eligible to be back at school

Children eligible to return to school



NB: official eligibility during level 3 is for children of essential workers.

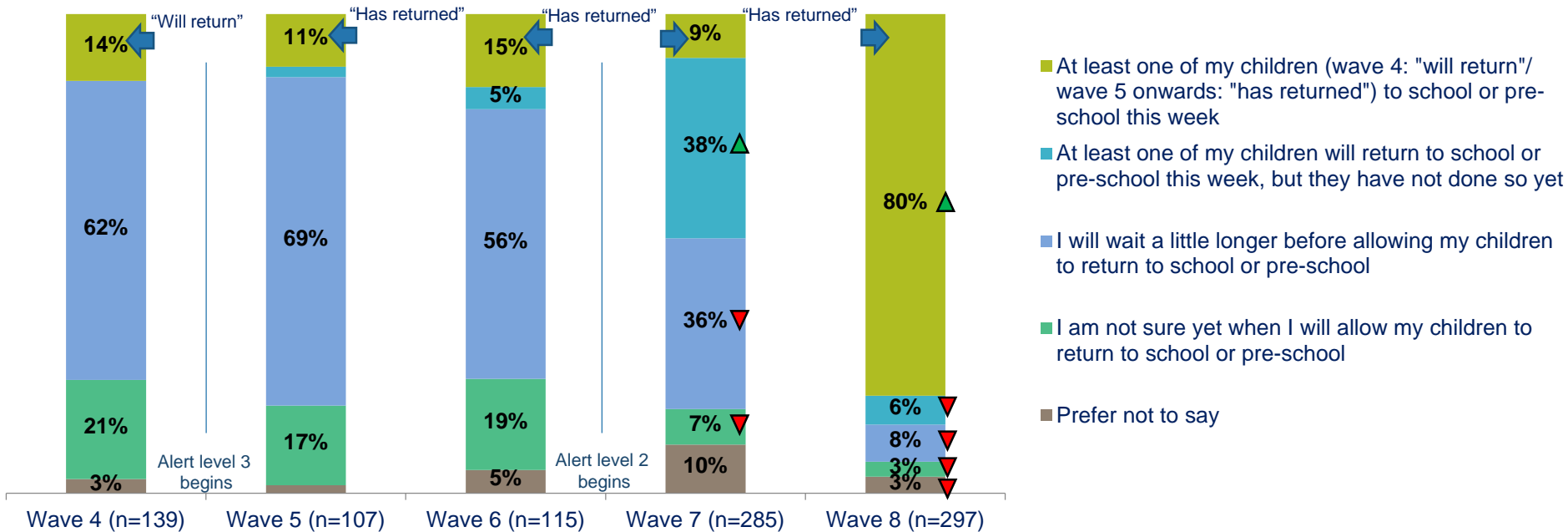
QHH1A. You said that you have children living at home with you. Which, if any of the following applies to you? QHH1B. And which, if any, of the following applies to you?

Base: those with children living at home



Although the majority of parents say at least one child has returned, one in five indicate that for whatever reason, their children are not yet back at school

Intending / have returned children to school

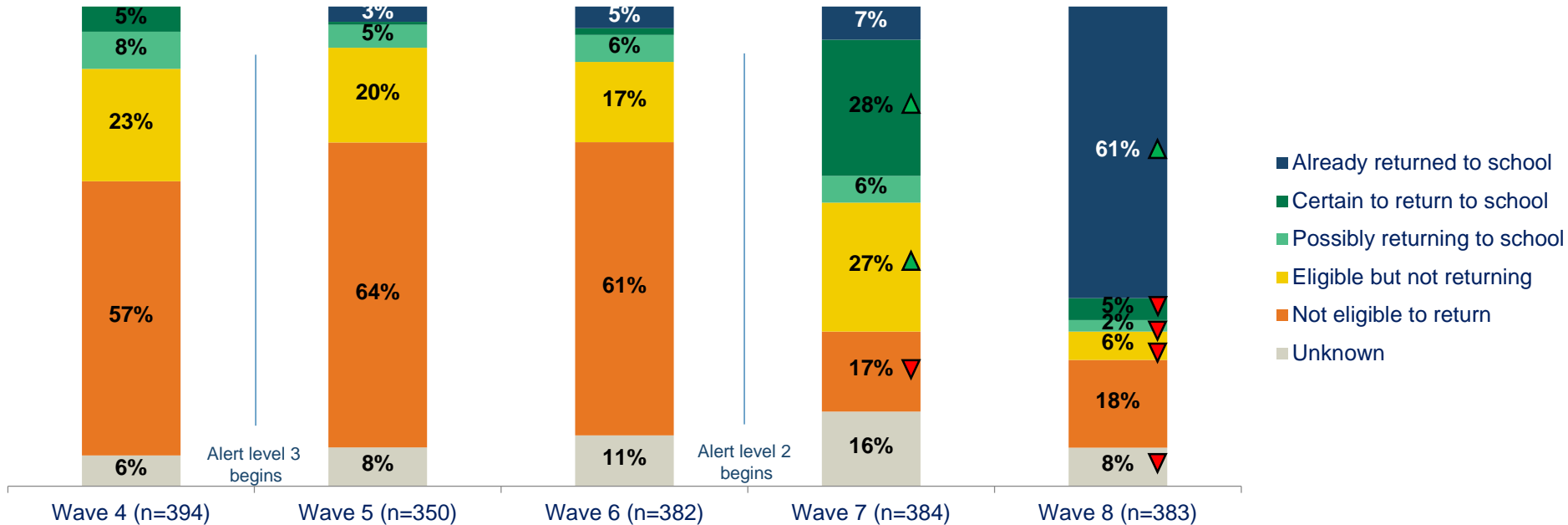


NB: official eligibility during level 3 is for children of essential workers.

QHH1A. You said that you have children living at home with you. Which, if any of the following applies to you? QHH1B. And which, if any, of the following applies to you?
 Base: those with children living at home

The proportion of parents who have returned their children to school in wave 8 is more than double the proportion who said they were certain to do so in wave 7

Intending / have returned children to school



NB: official eligibility during level 3 is for children of essential workers.

QHH1A. You said that you have children living at home with you. Which, if any of the following applies to you? QHH1B. And which, if any, of the following applies to you?

Base: those with children living at home



