

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–15 weekly core report

21 July 2020

Disclaimer

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

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

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

Report content

COVID-19 transport impact

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The background image shows a group of people enjoying outdoor activities in a park. In the foreground, a person in a dark jacket is walking towards the left. In the background, two people are riding bicycles on a path. The scene is set in a lush, green park with trees and a clear sky. A diagonal blue line runs from the top right corner towards the bottom left, separating the image into two sections.

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 biweekly 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 biweekly 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: 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, e tc.

Report notes (i)

Key information to note for this report

- This report is based on fifteen 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, and combined waves 11, 12, 13, 14, and 15 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' i.e. in February this year.
- At a total population level, significance testing indicated in this wave 15 report is based on a statistically significant shift of results between waves 1 to 15, 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 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	
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	

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 - 15	
		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=6,297	1.23
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=1,633	2.42
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=499	4.39
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=500	4.38
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=945	3.19
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=501	4.38
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=507	4.35
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=1,712	2.37
Disability, Vulnerability and COVID-19**									
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=705	3.69
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=1,378	2.64
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=696	3.71

*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 April 2021.

**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.

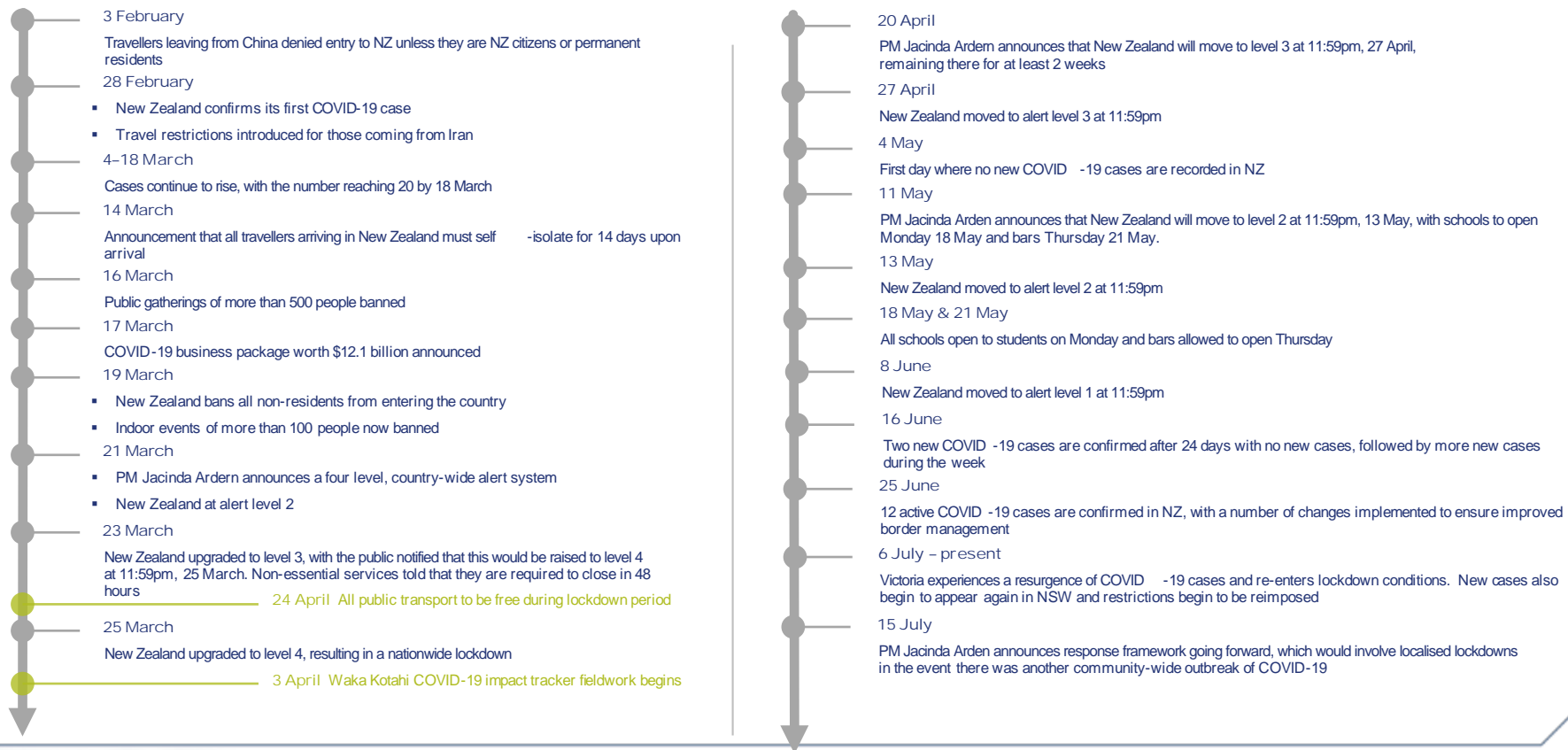
Active modes: refers to walking (of at least 10 mins) and cycling, including e-bikes.


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






Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–15

Waka Kotahi COVID-19 transport impact tracker

- Wave 15 of fieldwork is the fifth wave in the sixth week under level 1 conditions.
- Outside of explicit fears around infection and transmission, which are at levels matching those in wave 12 following new cases, MAPPS analysis indicates that COVID-19 has become less salient in people's transportation decision making under level 1 conditions.
- Despite this, there are still lingering impacts from COVID-19, which are concentrated in certain behaviours and transportation decisions and appear to impact public transport usage above all other aspects of travel.
- The types and frequencies of essential & non-essential journeys, as well as longer domestic journeys taken now appear to be more impacted by *non-COVID-19 factors* than they are by the COVID-19 context. The impact of public and school holidays and seasonal weather conditions being two of the most prevalent influences observed during recent waves.
- Throughout the lockdown conditions, mode usage has normally been responsive to changes in alert levels that are accompanied with lifted travel restrictions. After six weeks under level 1 conditions, reported usage has stabilised for most modes.
 - Active mode travel appears to be largely influenced by weather conditions, and not concerns around COVID-19, whereas private vehicle usage in wave 15 is virtually indistinguishable from stated pre-lockdown usage.
 - However, public transport appears to be a little more sensitive to changing contexts than other modes, with a directional drop off in bus and train usage accompanying the school holidays this week. The bus is also the one individual mode that has not recovered to match reported pre-alert usage levels at any point.
- When looking at how public transport usage can return to pre-COVID levels, it appears that for the most part conditions have returned to normal, although *COVID-19 is still a looming factor* in people's transport choices. This manifests as people staying off buses and trains due to fear of transmission, but the bulk of people are simply not using public transport because they have yet to return fully to work or university under current restrictions.
- Public transport modes have not been able to improve perceptions around capacity to socially distance during the lockdown, suggesting this is just a fixed reality in public perception and that improvements in image need to be sought elsewhere to draw passengers back to services, or that public transport will be reliant on the decreased salience of COVID-19 to overcome this barrier.
- In the higher alert levels, consideration acted as something of a lead indicator for future changes in mode usage, particularly with public transport, but has become less so as COVID-19 restrictions have become less salient. The relationship does differ somewhat for active modes and private vehicle usage.
- For the time being, it is likely that even with borders closed, domestic tourism by New Zealanders within New Zealand is not going to increase overall compared to last year, with the project NET change negative for all categories of tourism.
- Were borders to open, there would be a real willingness to travel internationally, with Australia the most considered destination.

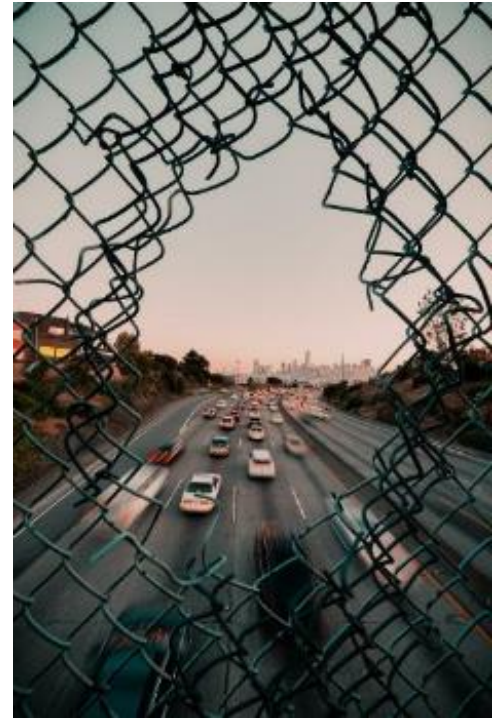
A photograph showing a person walking on the left and two cyclists on the right, all on a paved path. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is dark blue, and the lower-right portion is a lighter, warm-toned image of the scene. The text 'Section 3 – Context' is overlaid in white on the dark blue area.

Section 3 – Context

Key findings – context

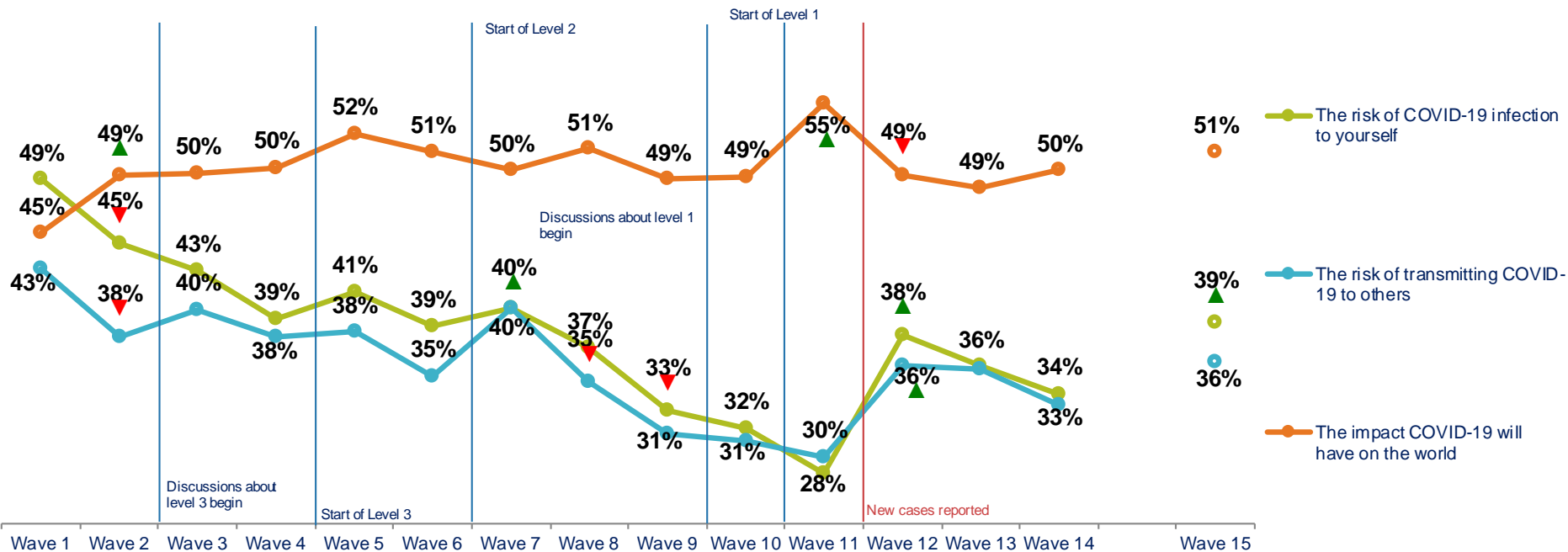
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- 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.
- There has been a statistically significant increase in explicit concerns about COVID-19 infection and transmission during the latest wave, taking these concerns to the same level that was seen following the announcement of new cases before wave 12.
- Economic concerns around the impact of COVID-19 are largely unchanged.
- Motivation factors around COVID-19 appear to have become less responsive to changes in context during level 2 and level 1 conditions, with little wave-on-wave change since these times.
- With fewer travel restrictions in place, ability factors have reached a stable level, with very few expressing an impact on their travel plans due to COVID-19.
- Despite an upturn in the recognition of adherence of others in wave 15, this remains at an historically low level.



There has been a recent increase in concerns about COVID-19 transmission equivalent to that which occurred in week 12, when new cases were announced

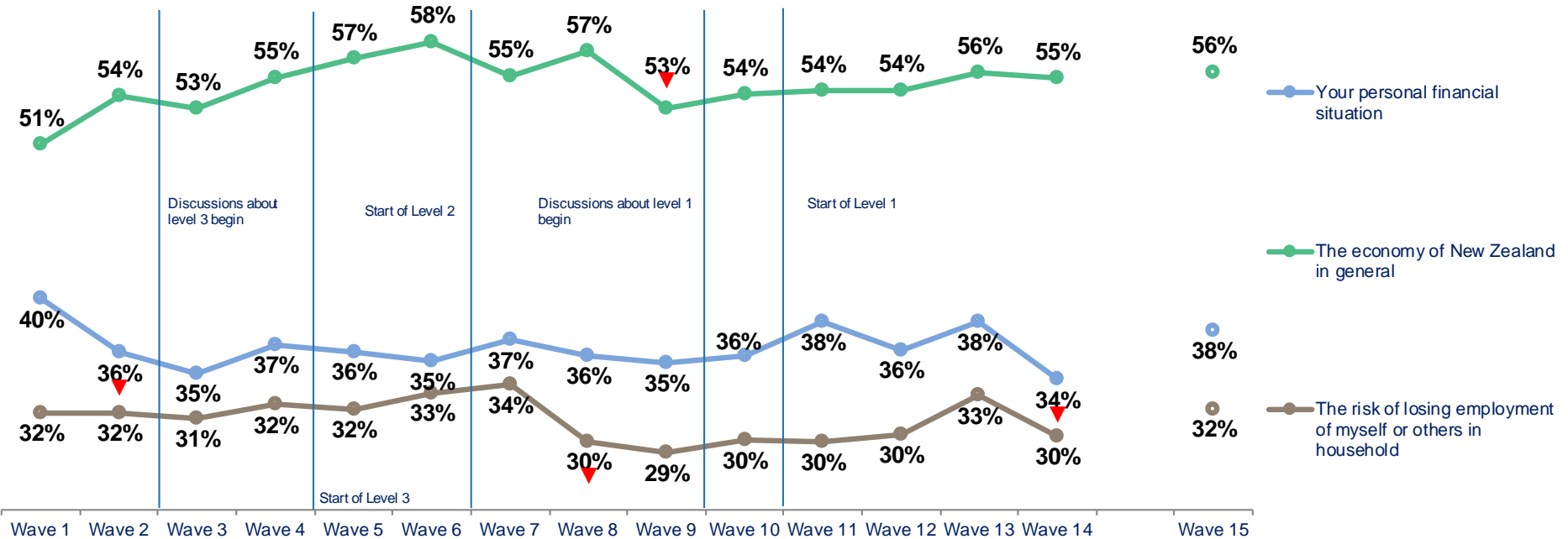
COVID-19 concerns (NETT all concerned)



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

Concerns about personal finances have not decreased in response to changes in alert levels in the same way as infection and transmission concerns

Economic concerns (NETT all concerned)



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

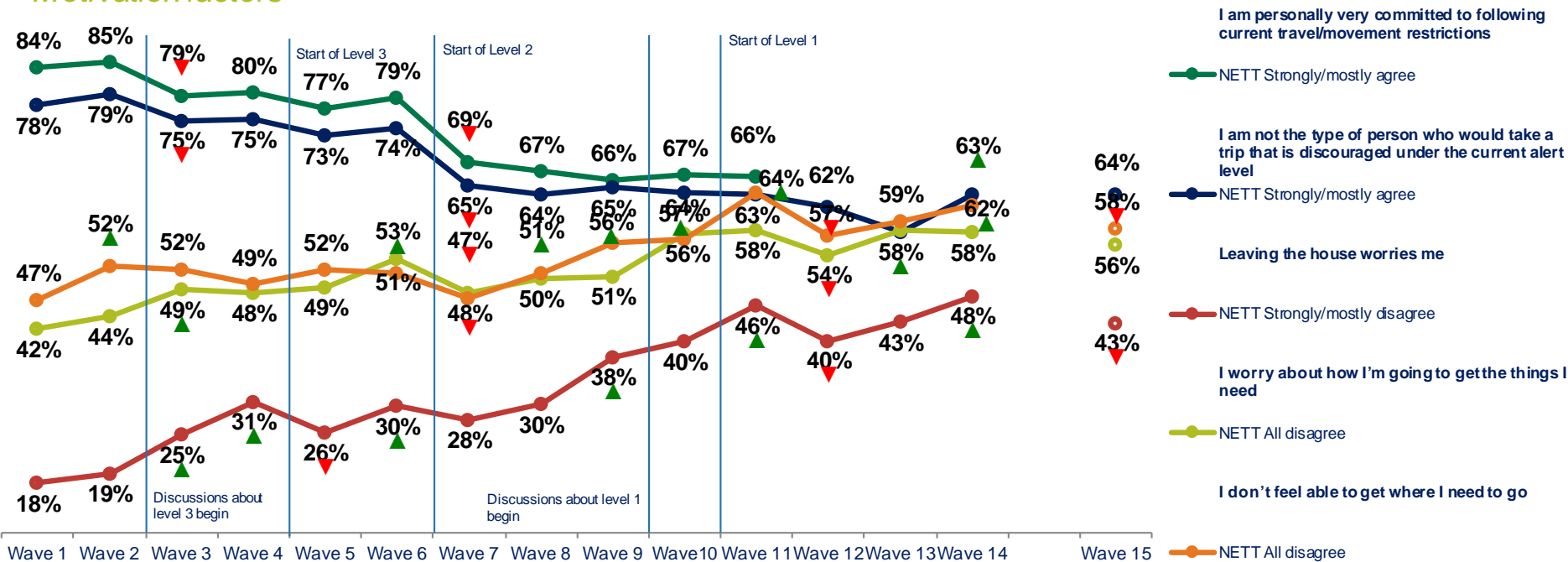
We use an holistic model of understanding how to influence behaviour change

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 New Zealand
	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
	Routines	It's not part of what I usually do	I feel confident I know what travel restrictions are in place when it comes to leaving the house My daily travel routines are disrupted at the moment I travel very differently in the winter to the way I do in the summer
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

Changes in motivations have been more pronounced at the switch to level 3 and level 2, but have been mostly stable in level 1

Motivation factors

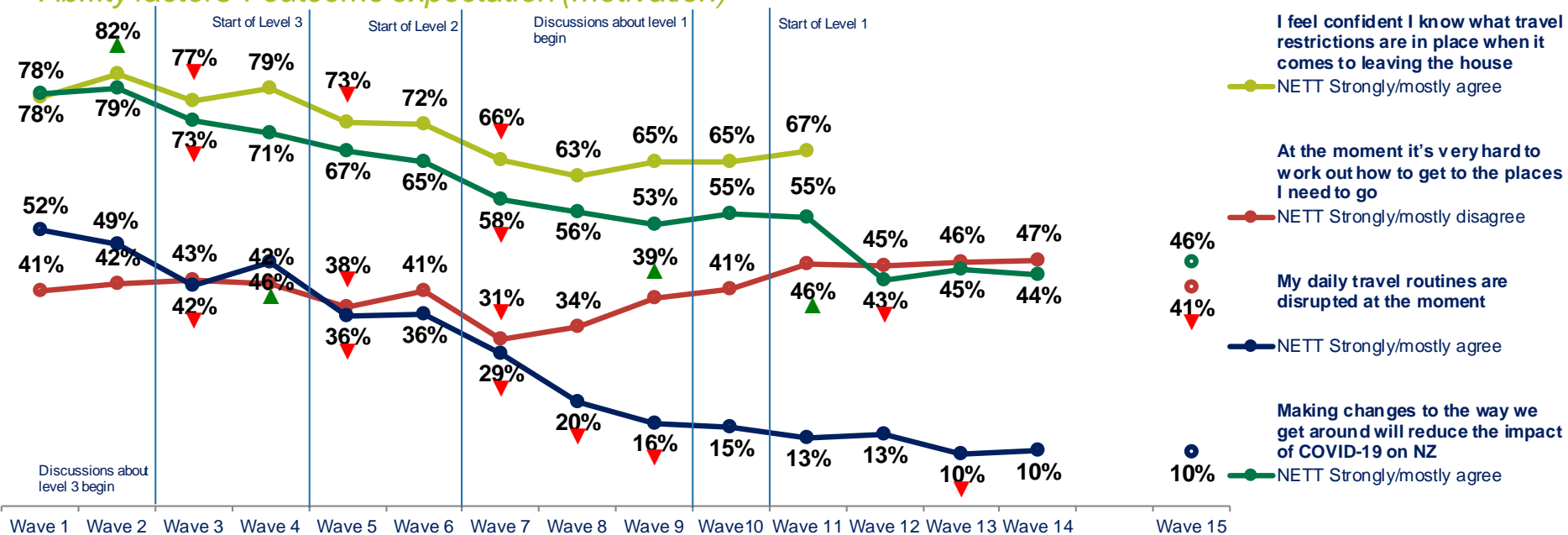


QATT: Thinking about recent events and the COVID-19 pandemic in general. To what extent do you agree or disagree with the following statements?
 Base: all adults 15+ in New Zealand



In level 1, the proportion who agree that their travel routines are disrupted has now dropped to one in 10

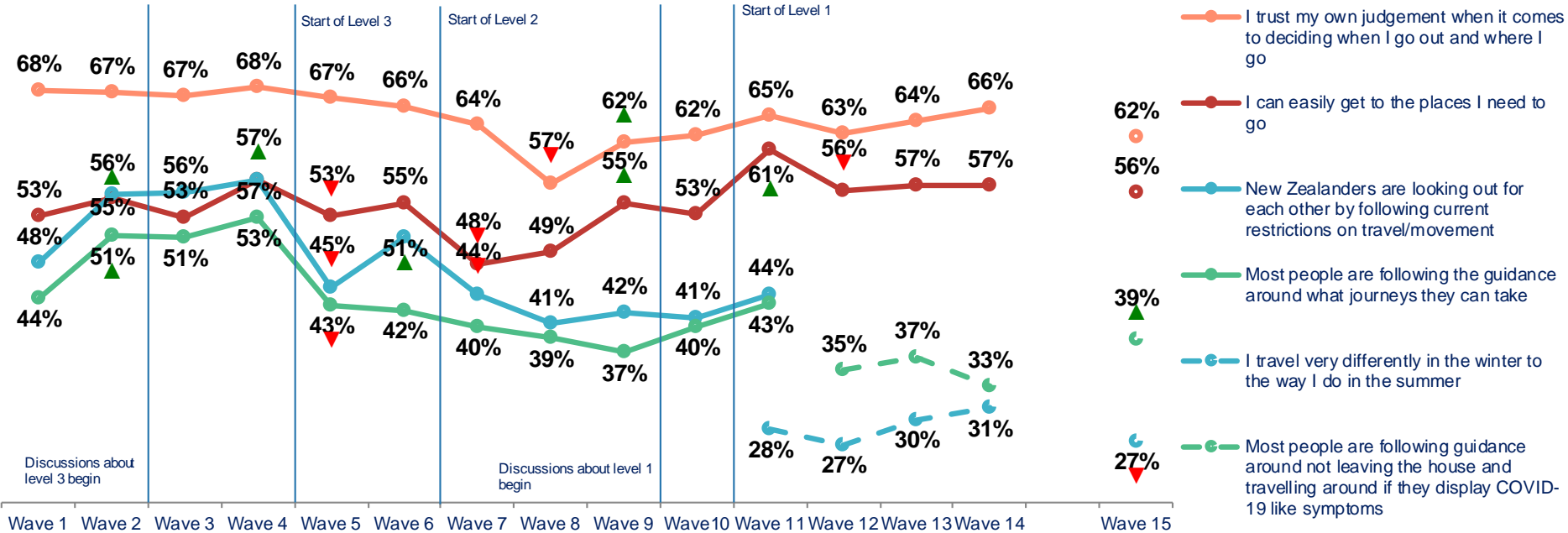
Ability factors + outcome expectation (motivation)



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

In wave 15 the proportion who recognise adherence among others has increased significantly

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



Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

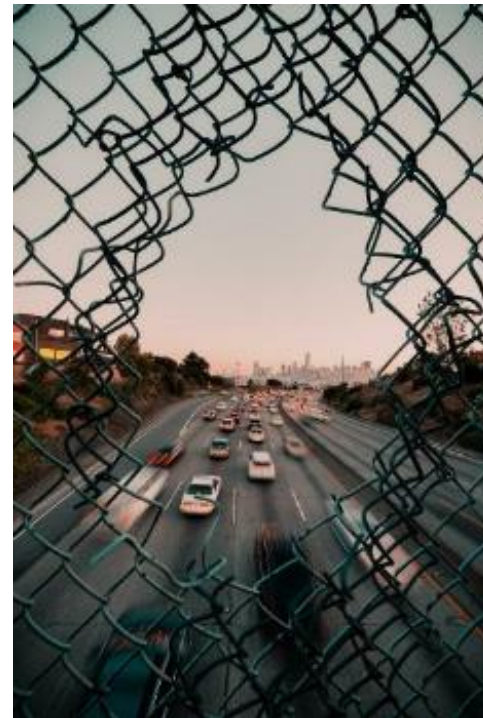


Section 4 – Local, domestic and inter-regional journeys

Key findings – local, domestic and inter-regional journeys

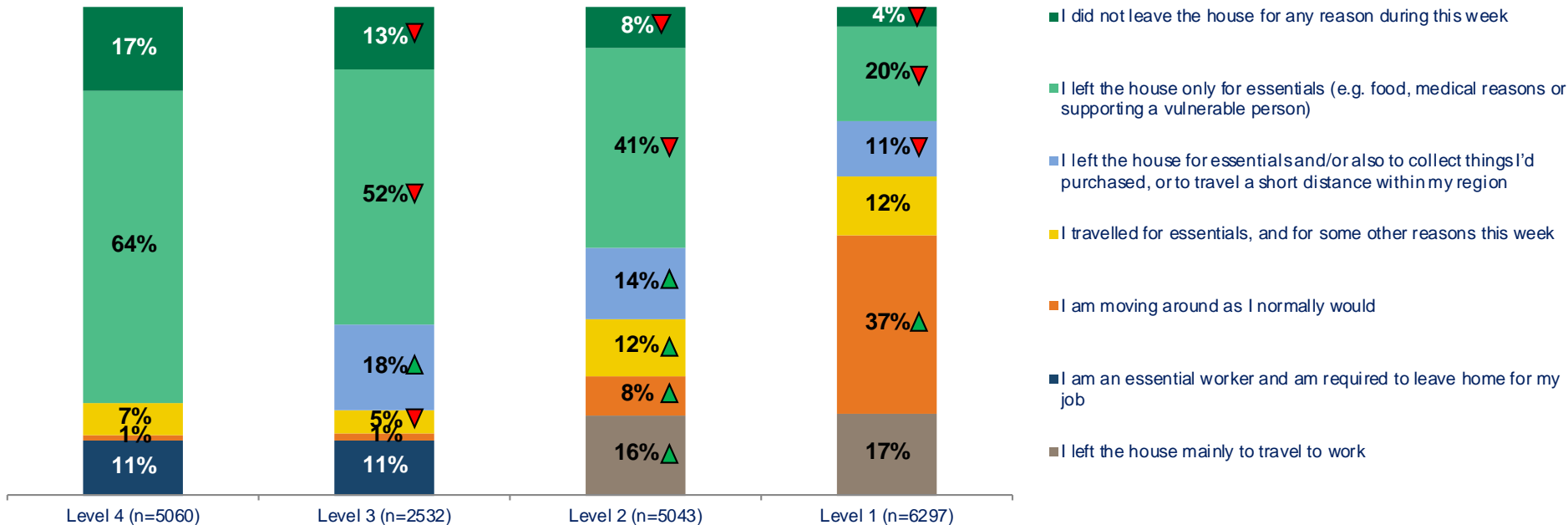
Waka Kotahi objective – how is travel changing?

- 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.
- Wave 15 took place during the second week of school holidays, and this appears to have materially impacted on the proportion making certain essential journeys.
- There has been a statistically significant drop in those taking children to and from school, which has been accompanied by a minor directional decrease in work journeys taken.
- There has also been a statistically significant increase in those travelling to medical appointments during this wave, this has coincided with both school holidays and colder, wetter winter conditions.
- Journeys for exercise have been steadily decreasing since the end of level 4 conditions, in line with winter setting in across the country.
- Non-essential journeys have plateaued but have not recovered to the stated levels from before lockdown.
- In terms of inter-regional travel, there has been a statistically significant increase in holidays trips and visits to friends and family, equivalent to that seen around the Queen's birthday weekend.



More than a third of those interviewed in level 1 are travelling around as they normally would

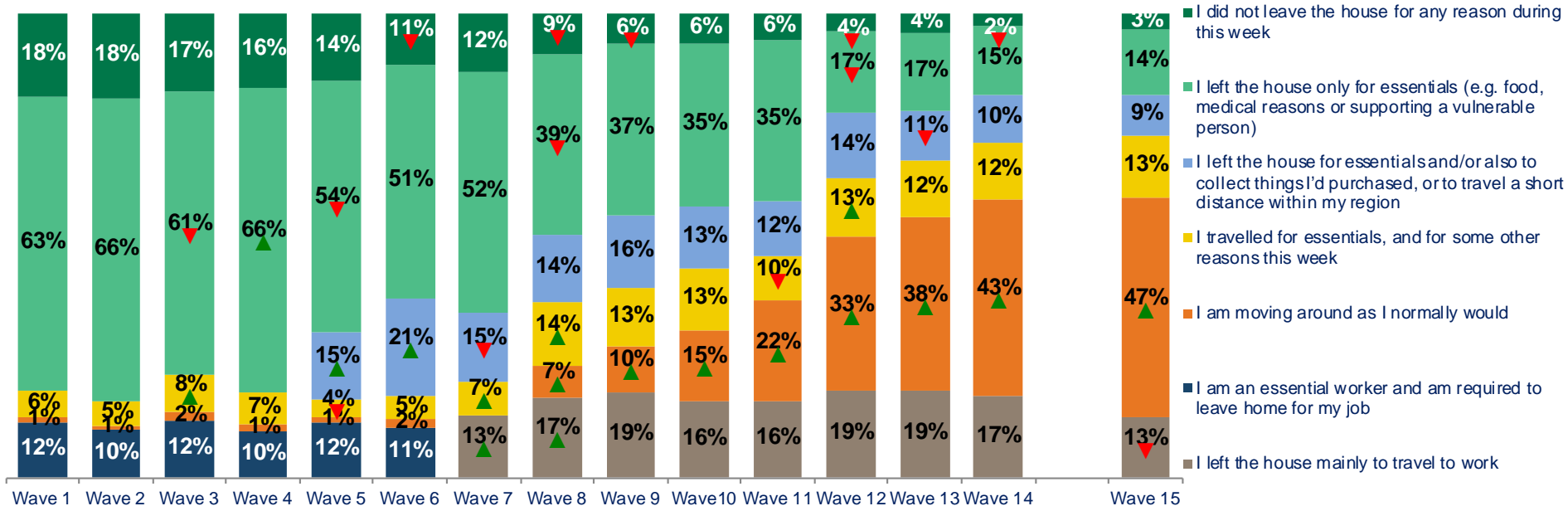
Reported activity and movement during the past seven days by alert level, excludes exercise



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

At this point, almost half say they're travelling as they normally would, while approximately one in six are self-isolating in some way

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



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

Base: all adults 15+ in New Zealand



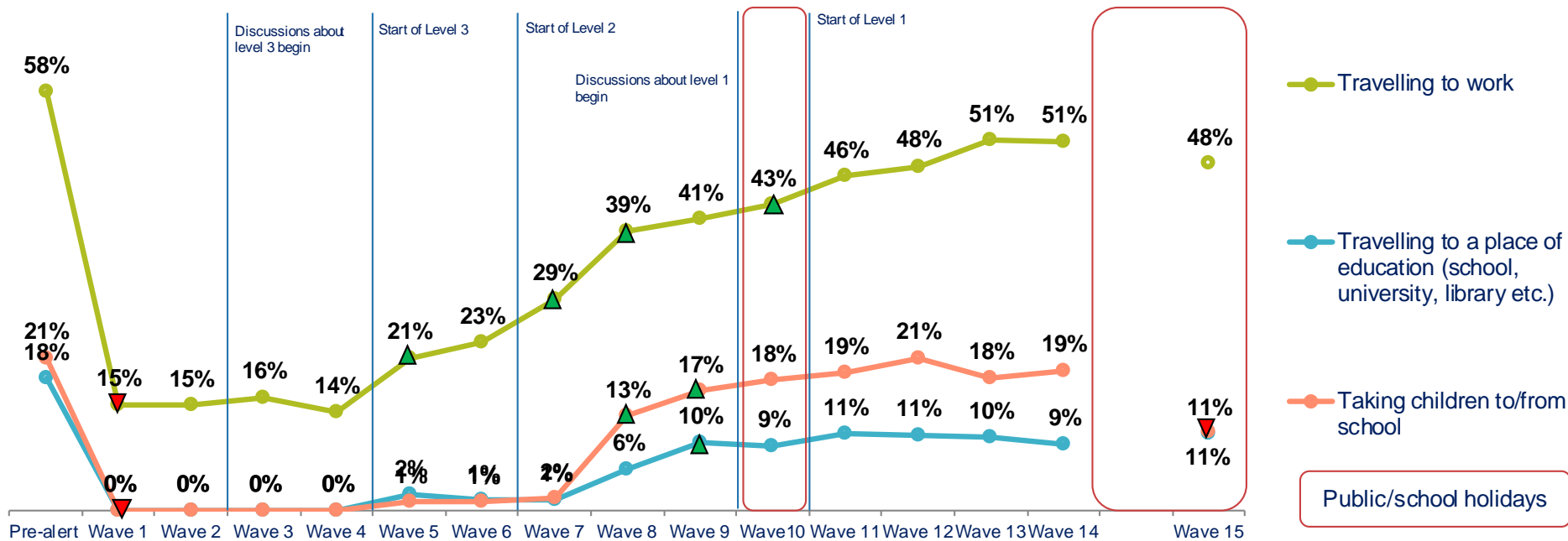
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

During school holidays, there has been a directional drop off in those travelling to work as well as a significant decrease in those taking children to school

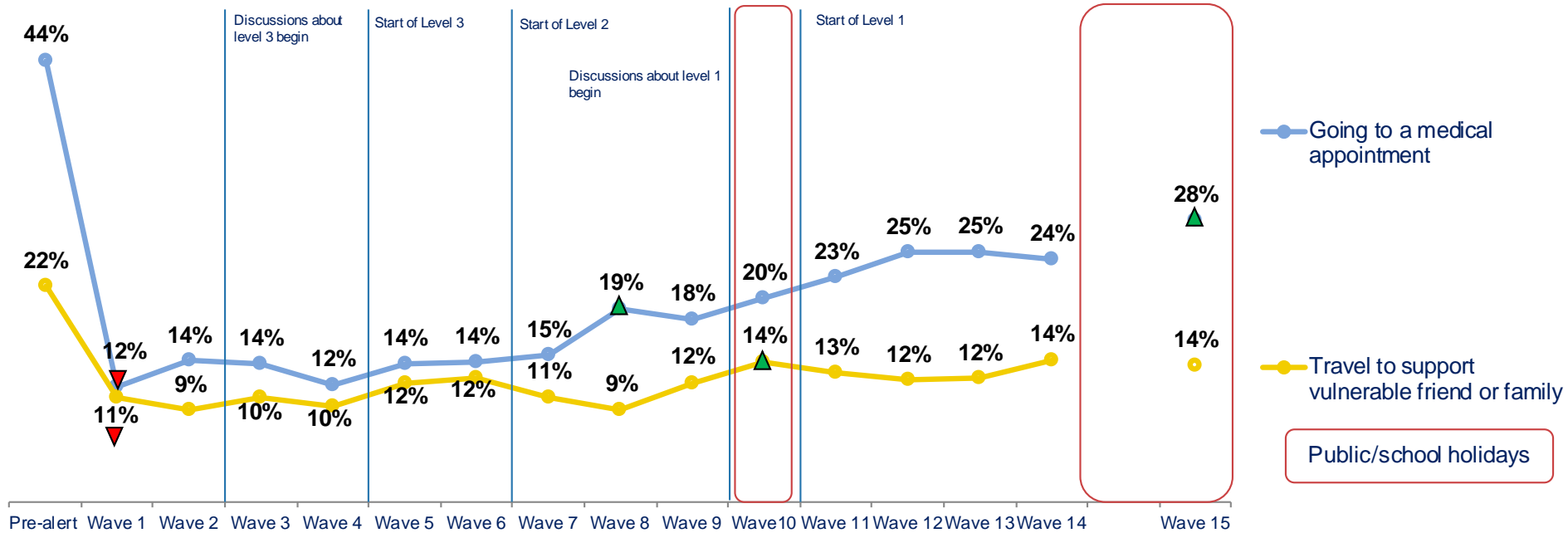
Reported activity and movement during the past seven days by wave



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), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263), wave 13 (n=1,263), wave 14 (n=1,230), wave 15 (n=1,273)

There has been a statistically significant increase in those travelling to medical appointments during this wave

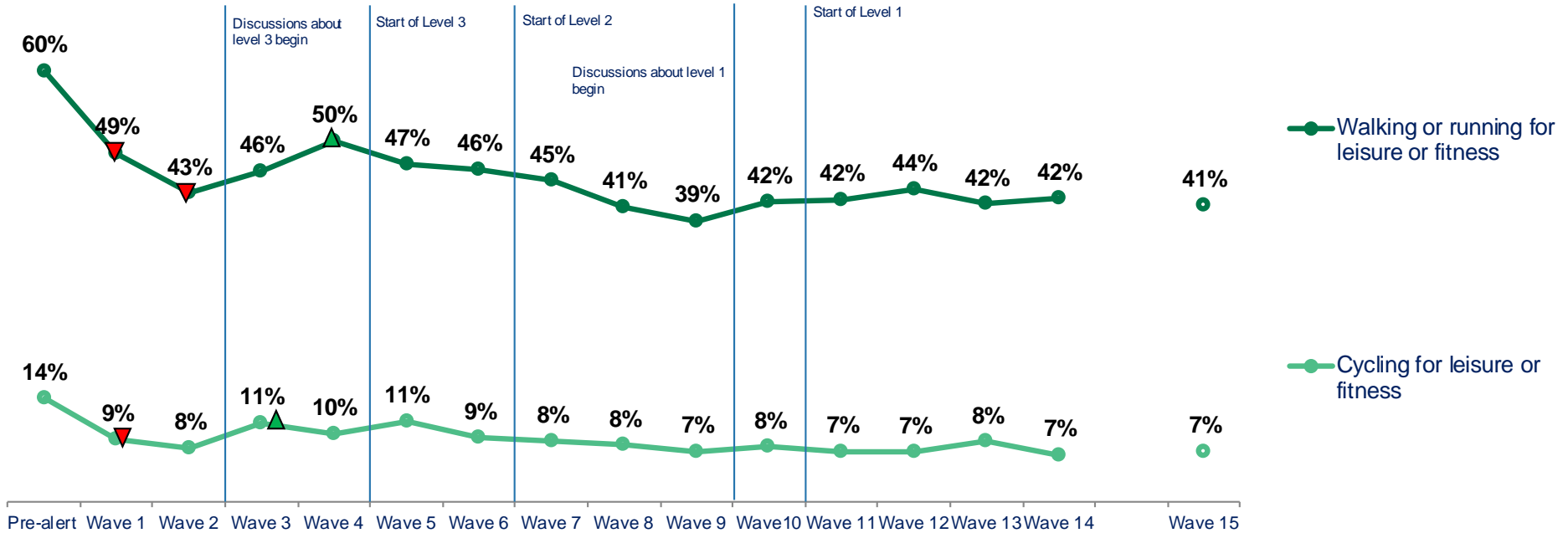
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The proportion taking leisure and exercise trips began dropping at the end of level 4 and has remained at a low level during the winter months

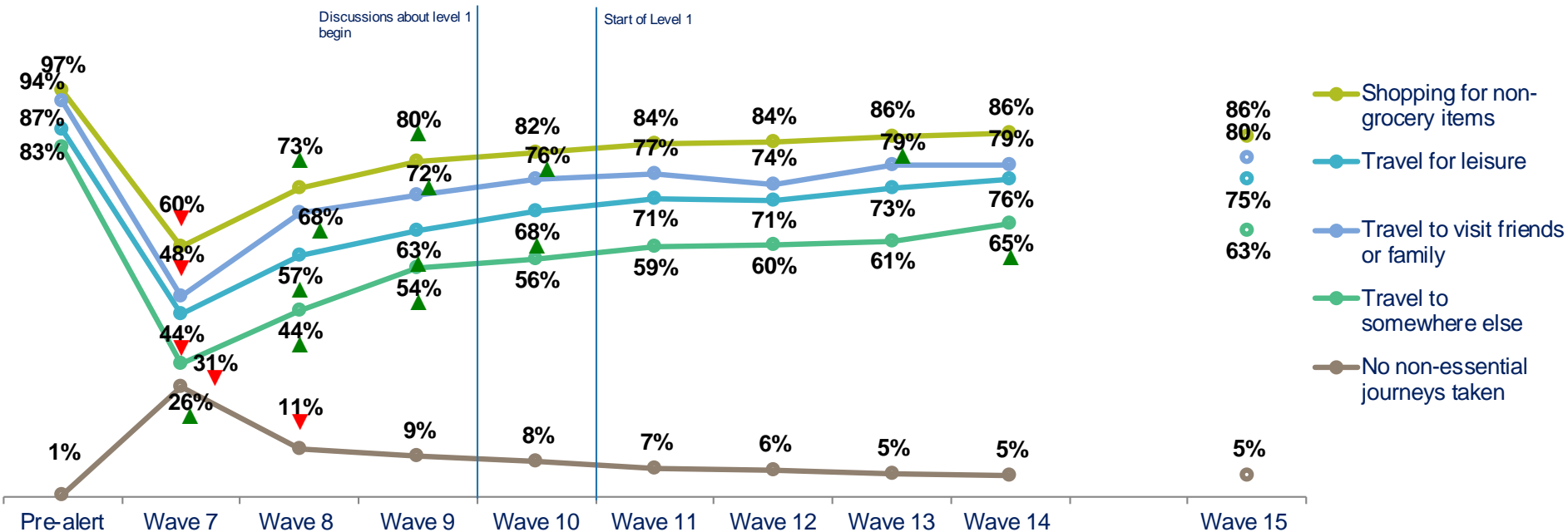
Reported activity and movement during the past seven days by wave



QJOURNEY 1/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), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263), wave 13 (n=1,263), wave 14 (n=1,230), wave 15 (n=1,273)

Once non-essential journeys became possible, there were several weeks of statistically significant increases, but this has generally plateaued in level 1

Non-essential journeys by wave

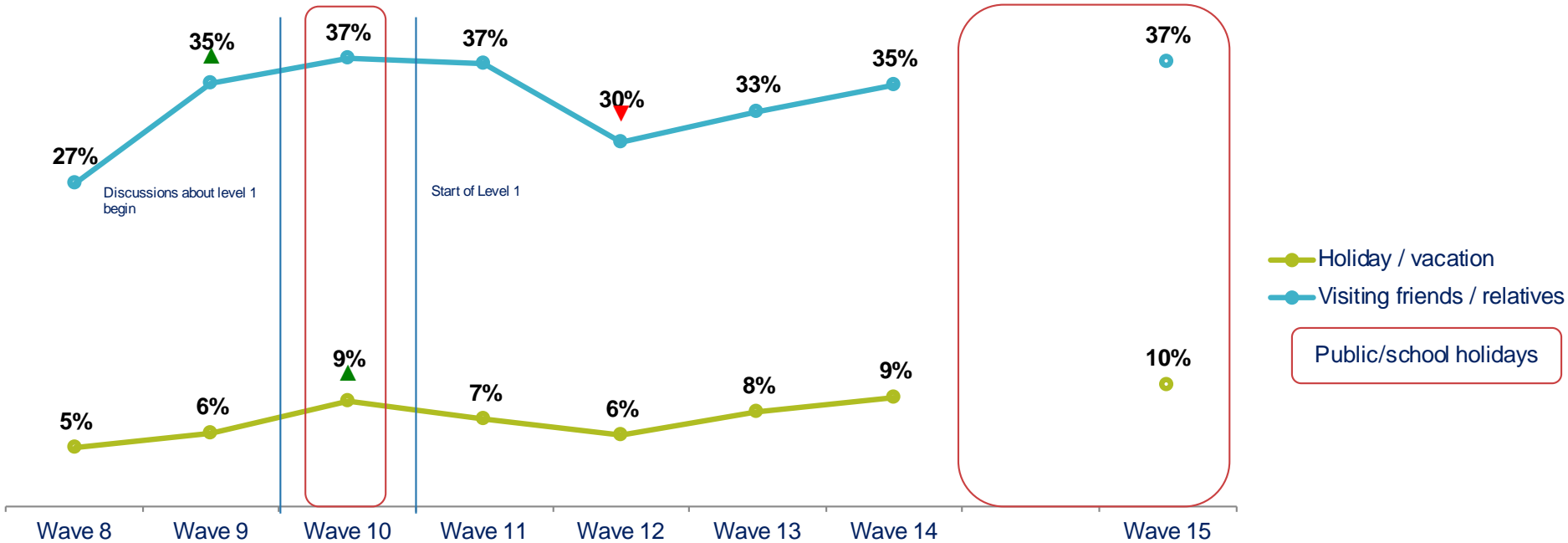


QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?

Base: all adults 15+ interviewed during level 2 and level 1 in New Zealand

Holiday and family visits peaked in wave 10, following the Queen's birthday weekend and have returned to similar levels this week with school holidays

Domestic journeys in the past seven days by wave



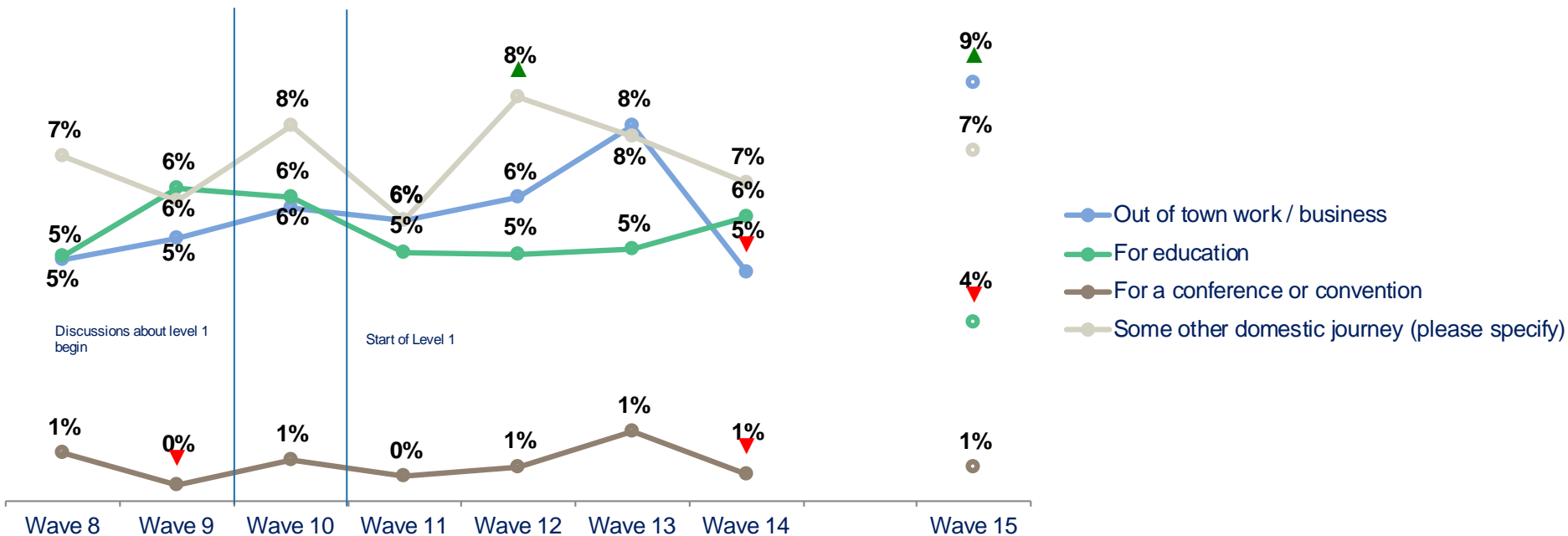
QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?

Base: all adults 15+ in New Zealand; wave 8 (n=1,264), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268), wave 12 (n=1,263), wave 13 (n=1,263), wave 14 (n=1,230), wave 15 (n=1,273)



Domestic work and education journeys have seen a greater level of variability since inter-regional travel became possible in wave 8

Domestic journeys in the past seven days by wave



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

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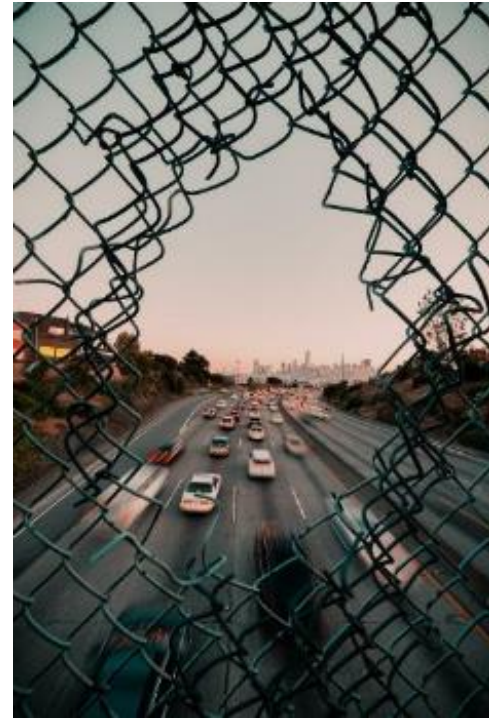
A photograph showing a person walking on the left and two cyclists on the right, all on a path. The image is split diagonally from the bottom-left to the top-right. The upper-left portion is dark blue, and the lower-right portion is a lighter, natural color. The text 'Section 5 – Modal changes' is overlaid on the dark blue area.

Section 5 – Modal changes

Key findings – modal changes

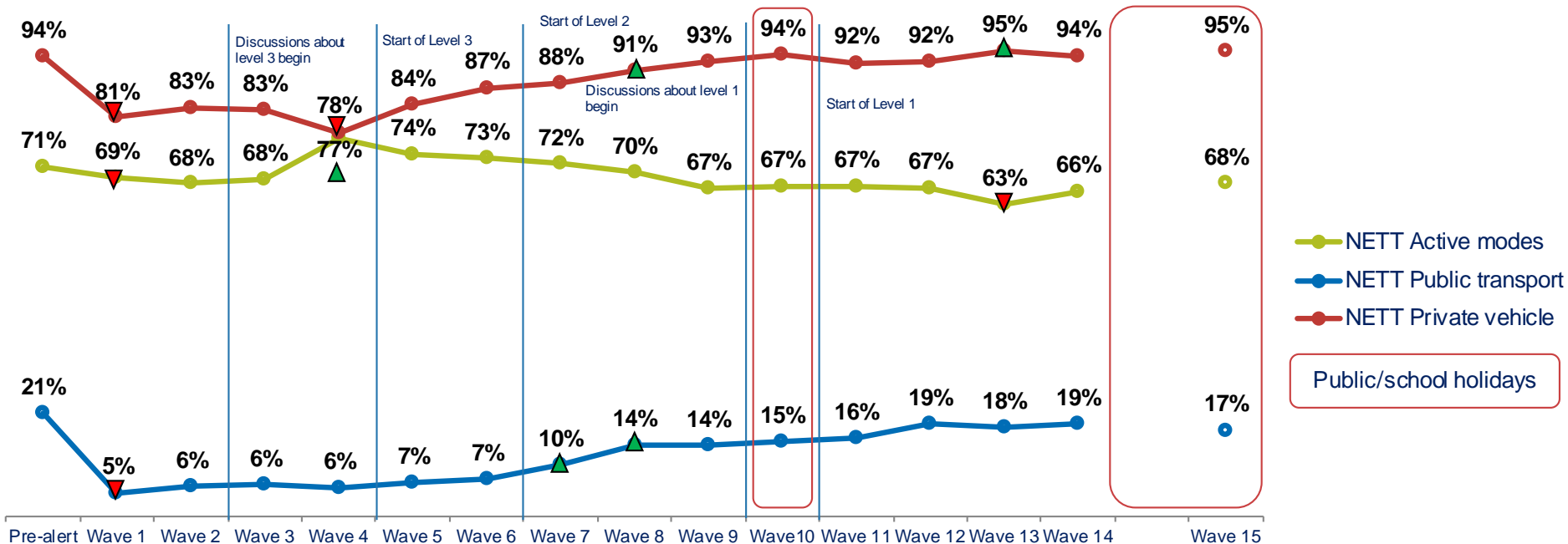
Waka Kotahi objective – how and why is travel changing?

- 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.
- Growth in mode use has slowed, with private vehicle usage now largely back to normal both in terms of the number of weekly travellers and the volume of travel days.
- Public transport usage has remained stable in level one but is some way short of pre-alert usage levels. In wave 15, there has been a directional drop off in both bus and train usage which has coincided with school holidays.
- In terms of volume, the average number of travel days for buses and trains peaked in waves 12 and 13 respectively, but has been directionally declining since this time.
- Meanwhile, active mode travel has been decreasing under winter conditions, both in terms of the proportion travelling each week and the volume of travel days by this mode.



Public transport usage has remained stable in level 1, but is still slightly below reported pre-lockdown levels

Changes in mode usage by wave



QFREQ1/QFREQ2—And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (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), wave 9 (n=1,255), wave 10 (n=1,261); wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230), wave 15 (n=1,273)

Cars and vans make up the majority of private vehicle travel and the number of travel days reported has returned to pre-alert levels since the start of level 1

Car travel – mode usage and frequency

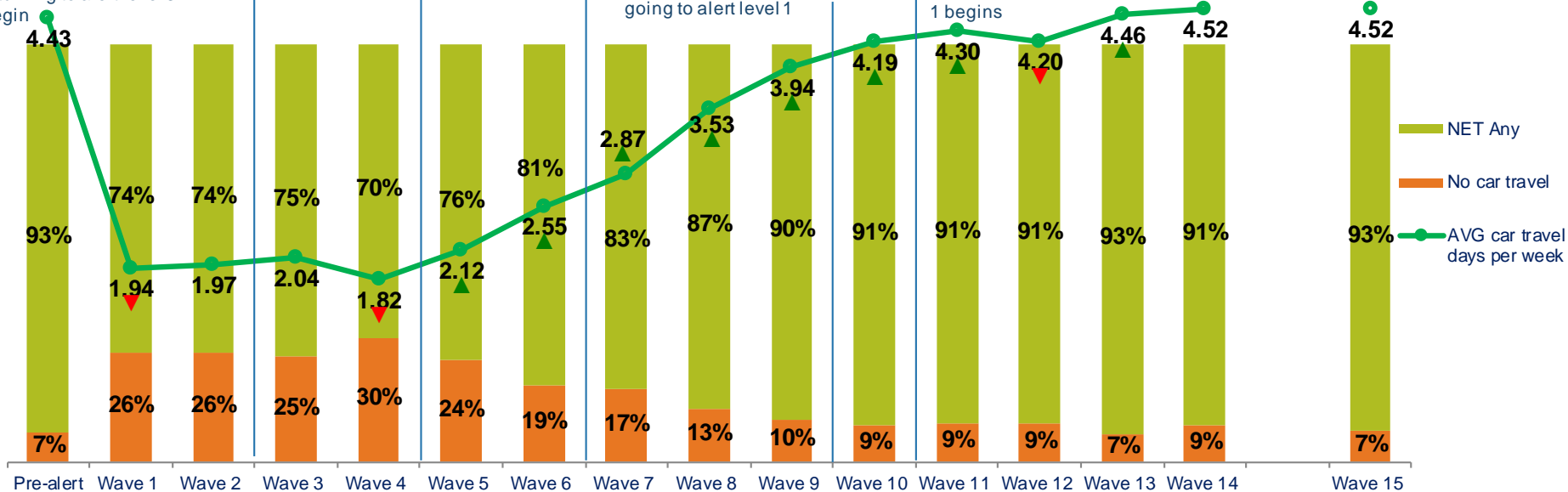
Public discussions about returning to alert level 3 begin

Alert level 3 begins

Alert level 2 begins

Public discussions about going to alert level 1

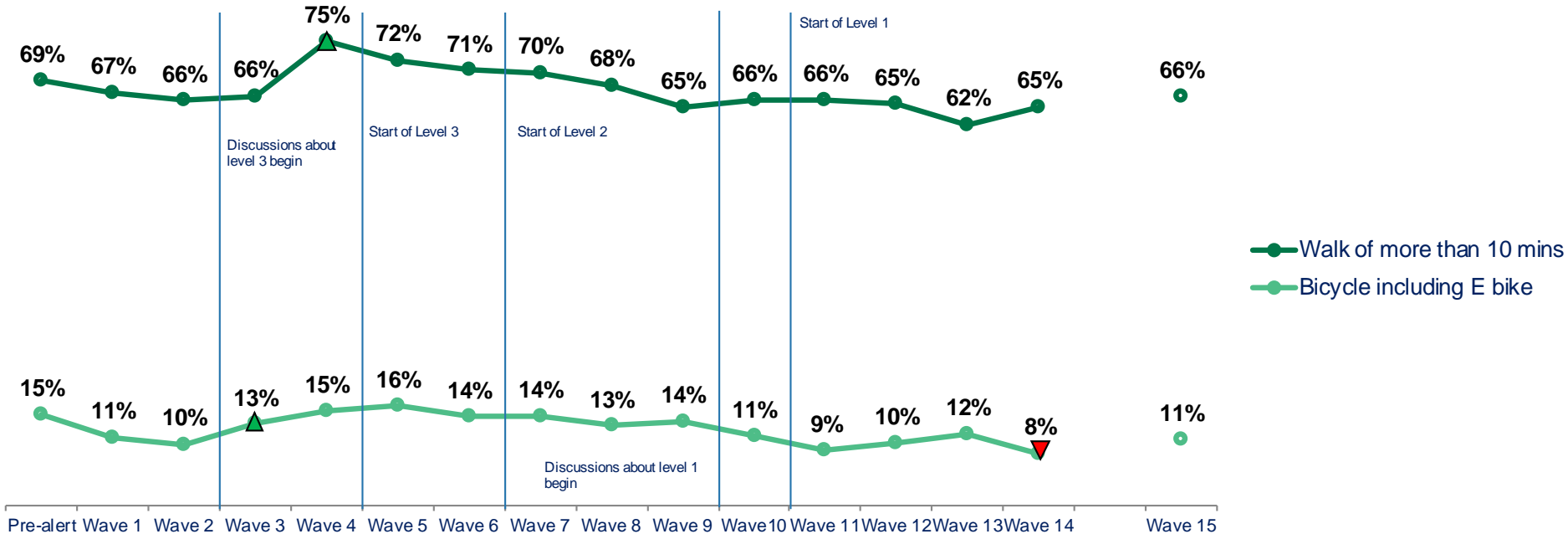
Alert level 1 begins



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 (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), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230); Wave 15 (n=1,273)

As with journeys specifically for leisure, there has been a general downward trend in travel by active modes since the end of level 4

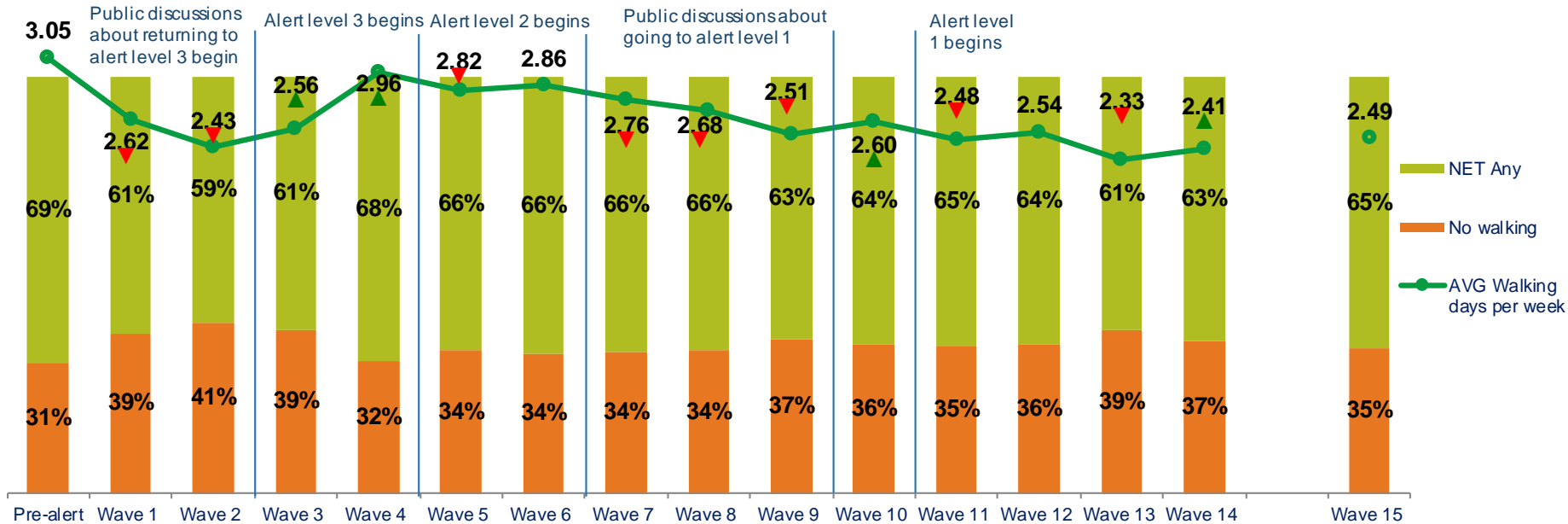
Changes in mode usage by wave – active modes



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), wave 9 (n=1,255), wave 10 (n=1,261); wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230), wave 15 (n=1,273)

Walking makes up the majority of active mode journeys, and the average number of weekly travelling days has started to recover over the past three weeks

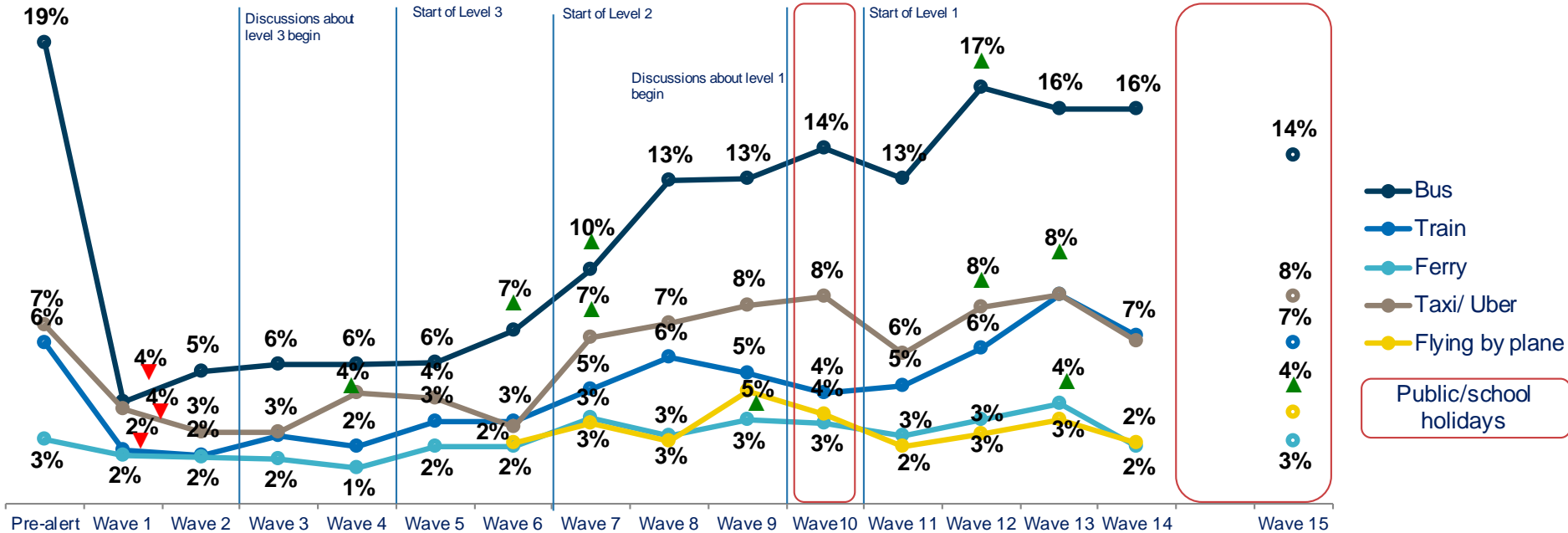
Walking – mode usage and frequency



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 (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), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230); Wave 15 (n=1,273)

Bus and train usage has dropped off somewhat during the school holidays, with reported bus usage still some way short of reported pre-alert levels

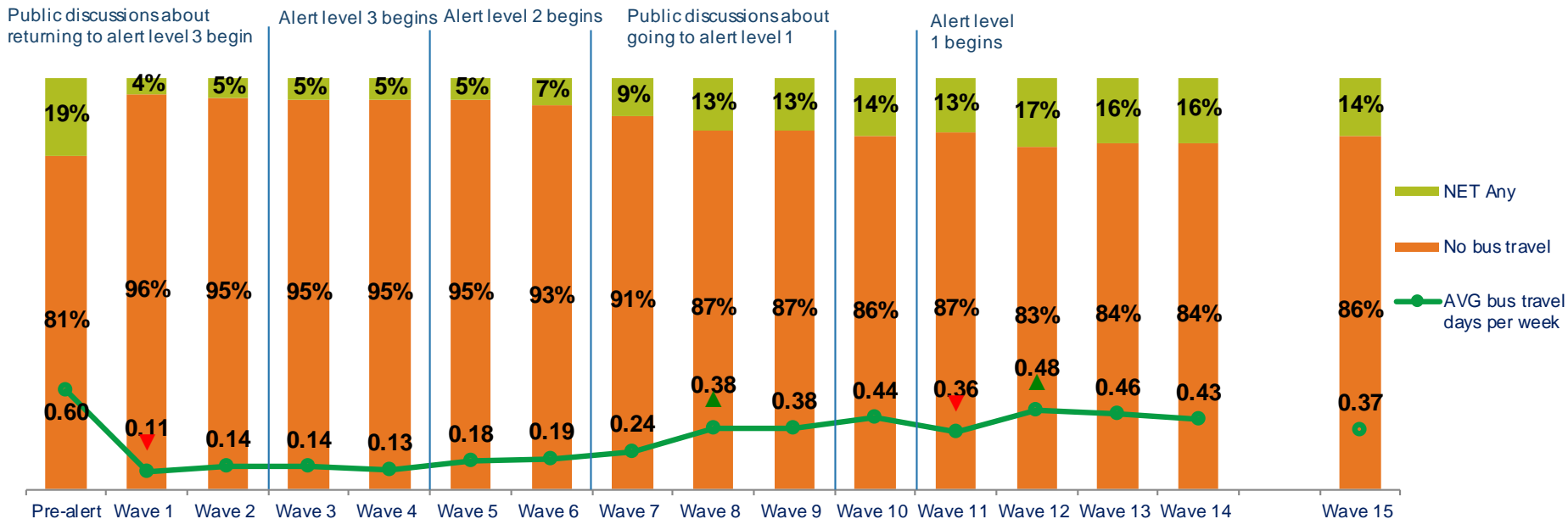
Changes in mode usage by wave



QFREQ1/QFREQ2—And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? 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); wave 9 (n=1,255); wave 10 (n=1,261); wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230); wave 15 (n=1,273)

The average number of bus journeys has been decreasing directionally over the past three waves, since peaking in wave 12 after new cases were announced

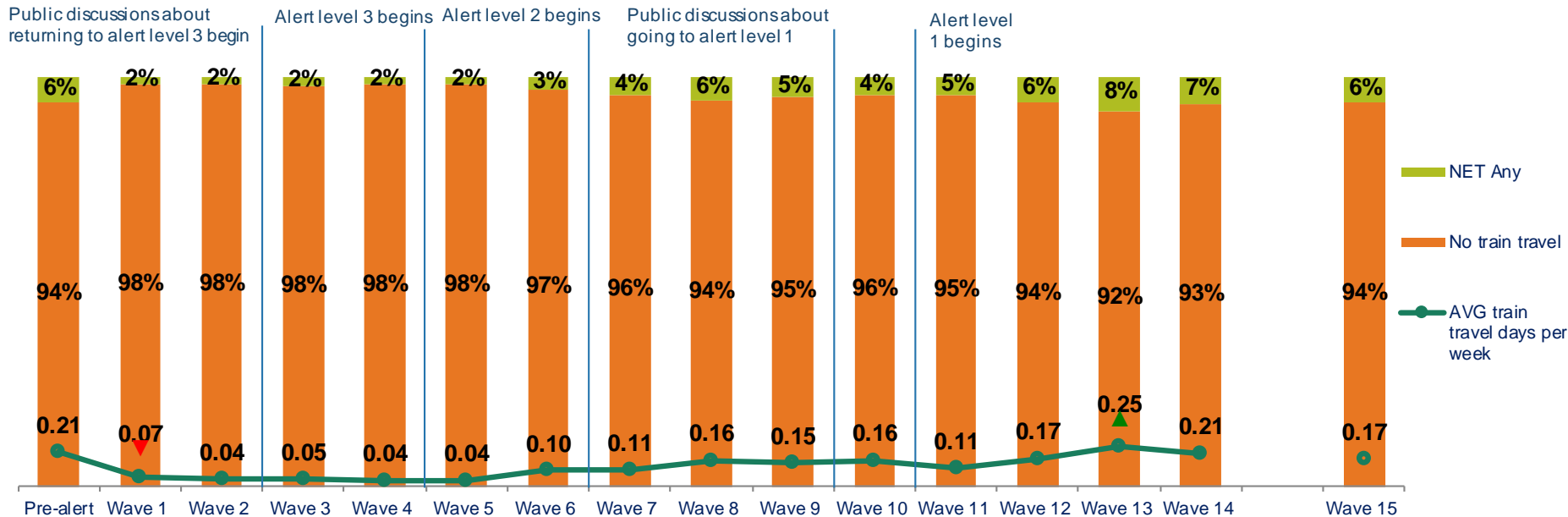
Bus travel – mode usage and frequency



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 (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), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230); Wave 15 (n=1,273)*

In terms of volume, reported train usage peaked during wave 13, three weeks into wave 1 but has declined directionally from this peak

Train travel – mode usage and frequency



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 (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), wave 9 (n=1,255), wave 10 (n=1,261), wave 11 (n=1,268); wave 12 (n=1,263); wave 13 (n=1,263); wave 14 (n=1,230); Wave 15 (n=1,273)

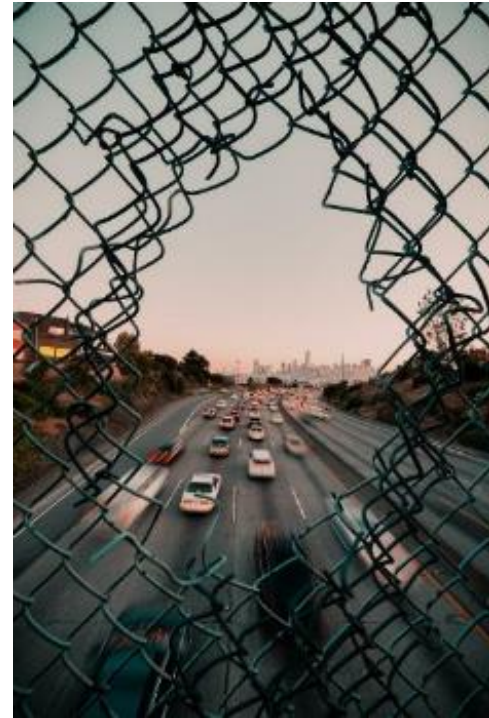


Section 6 – Changes in public transport usage

Key findings – changes in public transport usage

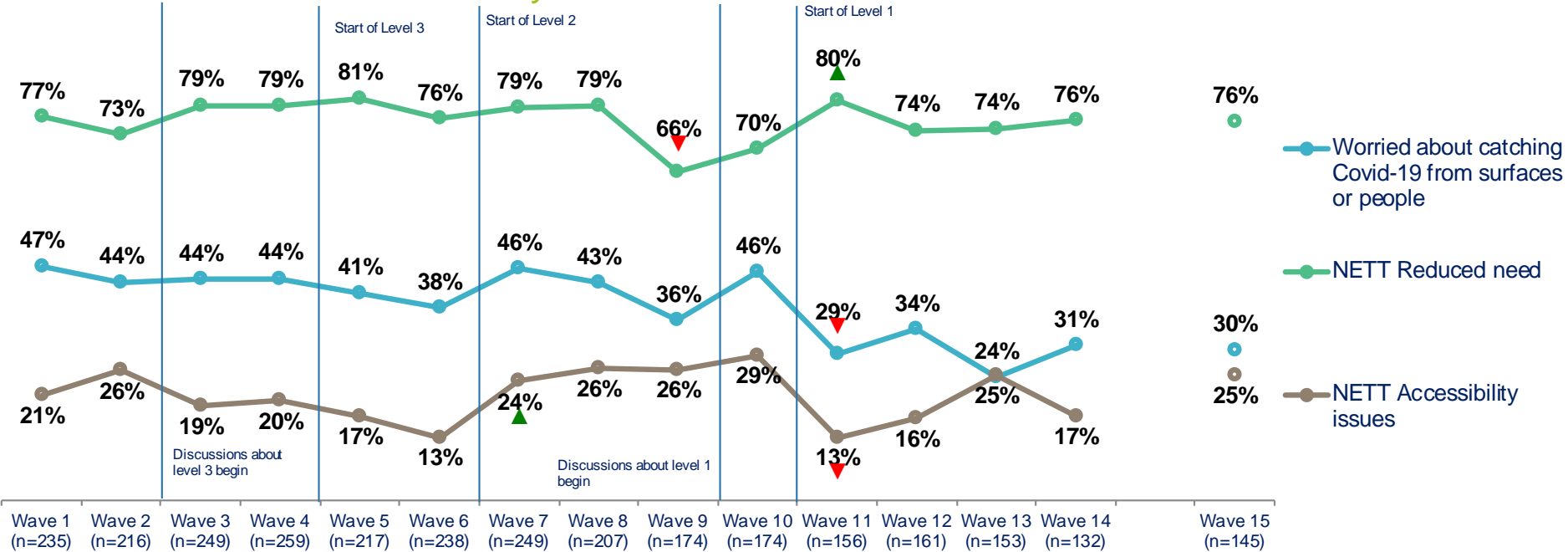
Waka Kotahi objective – how and why is travel changing?

- Within the context of public transport services returning to normal capacities it is important to track and understand the rates at which users return to public transport, the drivers of returning usage and the barriers that may still keep some passengers away.
- Growth in mode use has slowed during level 1, with the number of weekly bus and train users now close to pre-lockdown levels, but not quite fully recovered.
- Of those yet to return to public transport, the majority cite a simple reduction in need as the main reason for travelling less by public transport, as they have throughout all lockdown levels. Specifically, these people say that they are just travelling less than they normally do.
- Even though reduced need is the primary reason, three in 10 still cite concerns about COVID-19 transmission from surfaces or other travellers.
- When it comes to what will drive them back to public transport, a wholesale end to COVID-19 alerts and a return to daily work or education travel are the two big triggers for getting public transport back to normal.
- Among the small number of people who have dropped public transport as a commuting mode, COVID-19 transmission risks are a key reason for this switch.



Reduced need has been the most consistent overall theme in reasons for using public transport less, even when journeys have begun to pick up

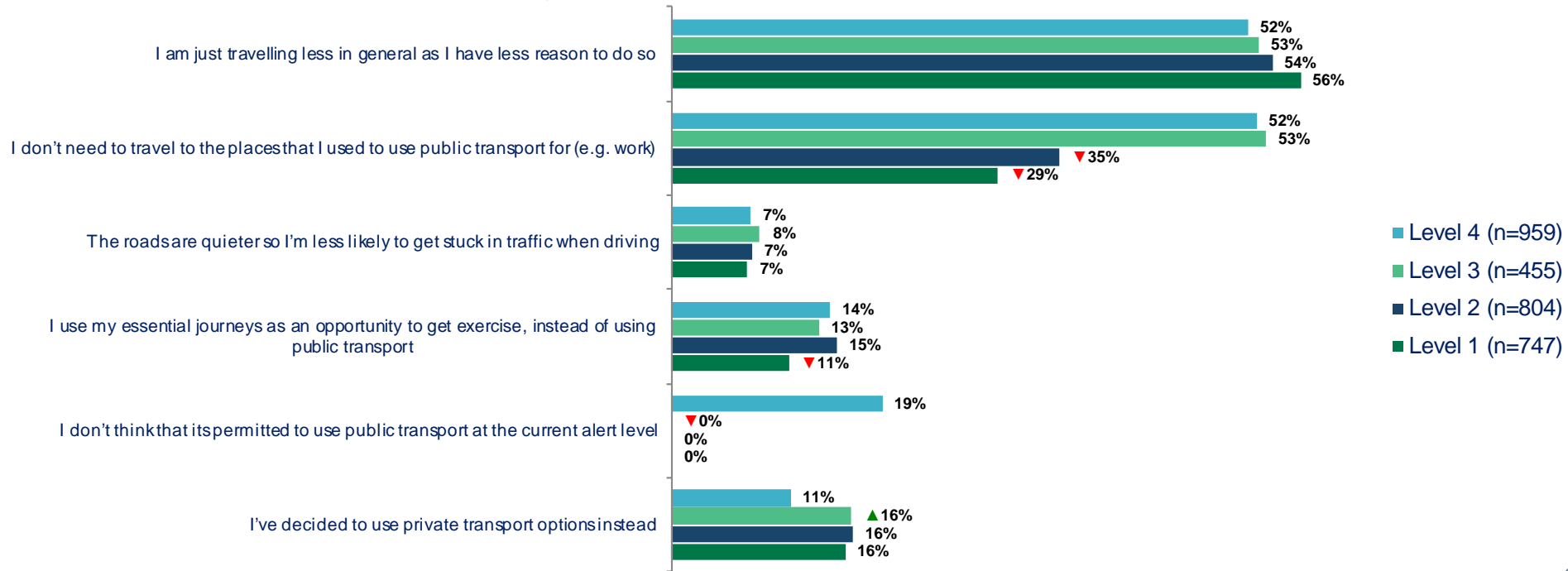
Reasons for decrease in PT activity



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

Of those mentioning reasons related to reduced need, a general reduction in overall travel is now much more prevalent than not needing to travel to work

Reasons for decrease in PT activity - reduced need and other reasons



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



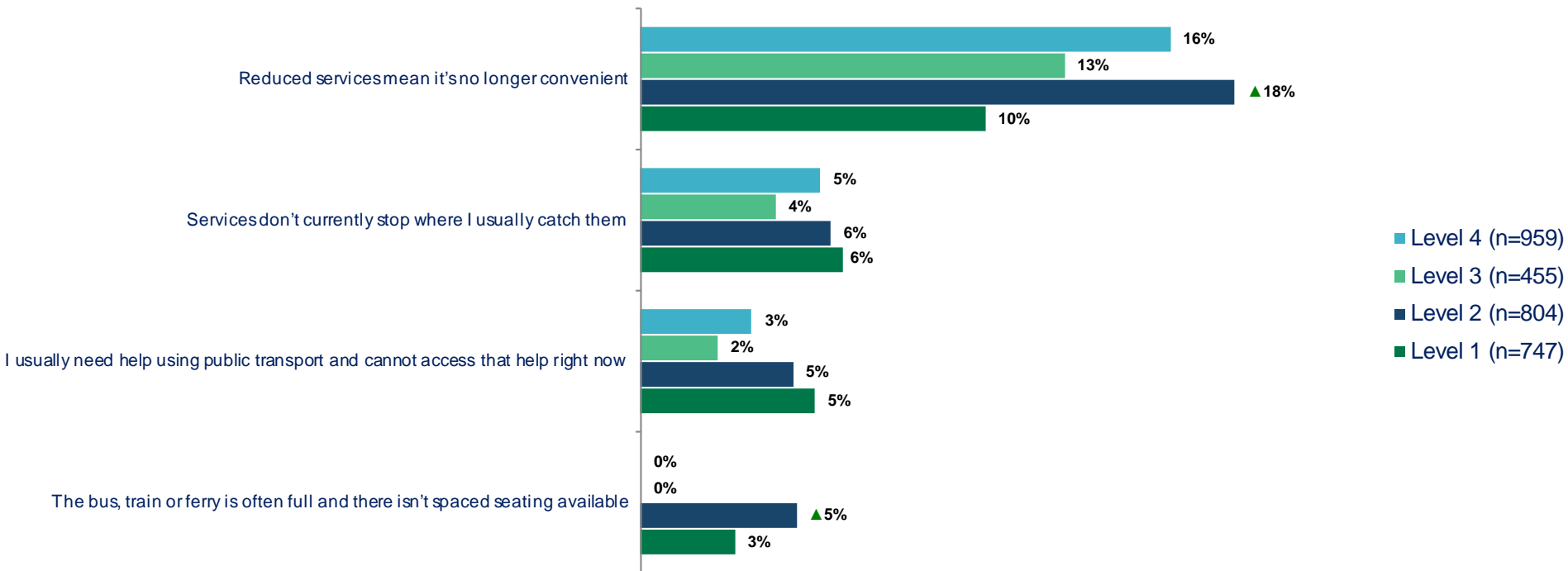
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

In level 1 a variety of accessibility issues are mentioned at largely a similar incidence

Reasons for decrease in PT activity - accessibility

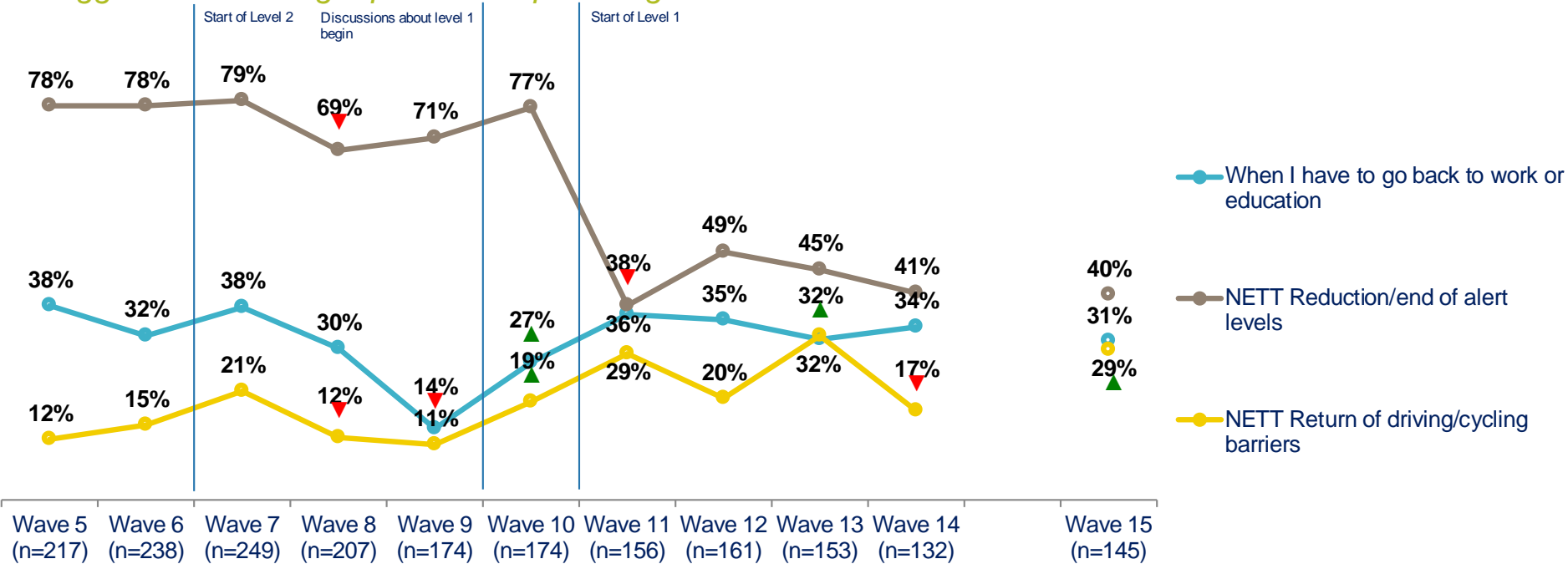


QDEC. For which, if any of the following reasons, has your use of public transport decreased?
Base: decreasing PT usage in past week



As many as two in five of those who have reduced their PT usage still say that they are waiting for an end to COVID-19 alerts and restrictions before returning

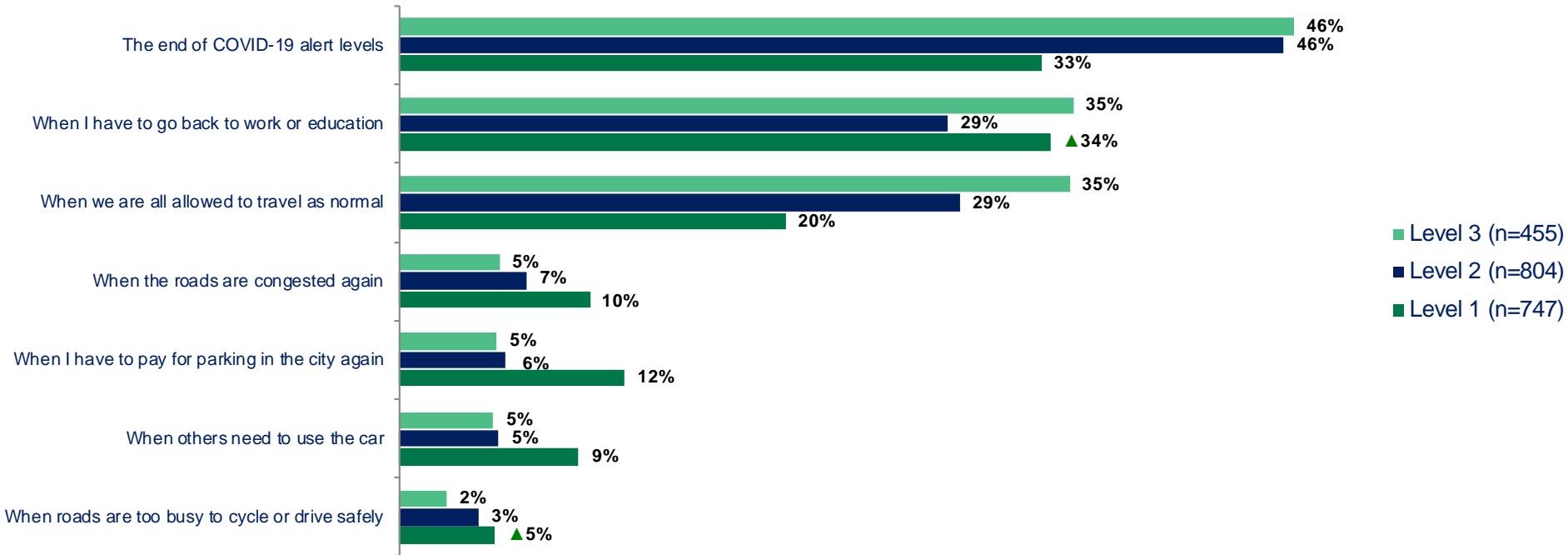
Triggers for returning to public transport usage in the future



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

A return to work or education and the end of alerts are the most cited triggers for returning to public transport among those interviewed during level 1 conditions

Triggers for returning to public transport usage in the future



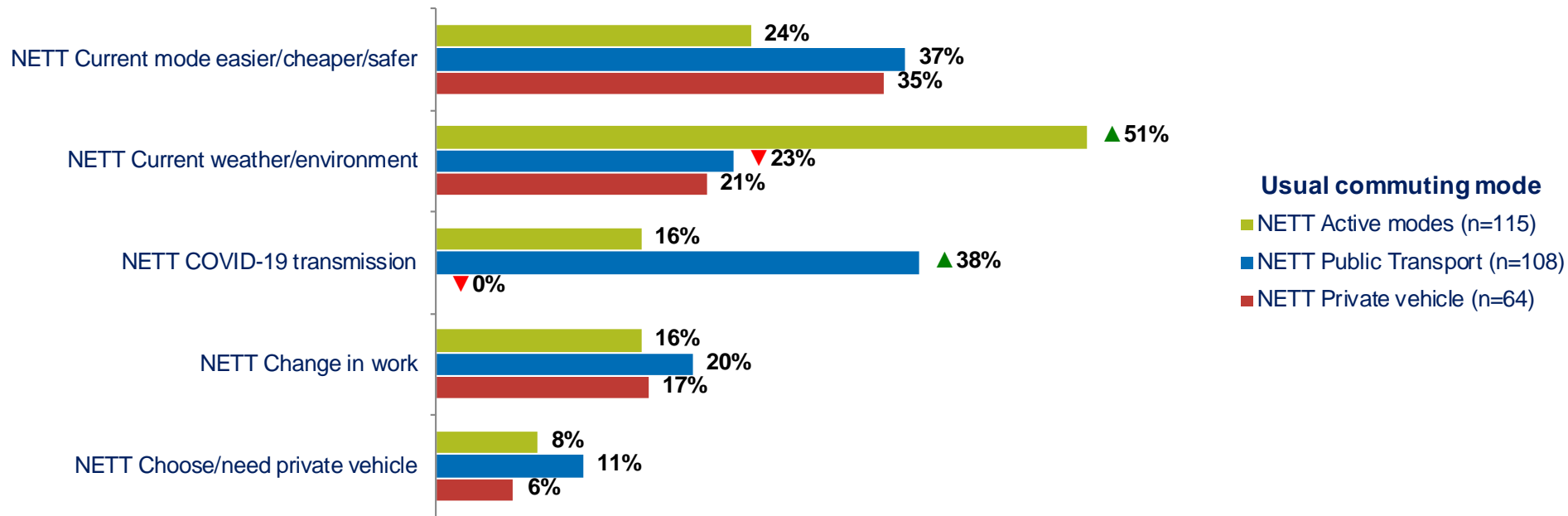
QDEC2. Which, if any of the following would encourage you to start using public transport as much as you used to?

Base: decreasing PT usage in past week



Concerns about COVID-19 transmission are prevalent among those who have switched from using public transport for their daily commute

Reasons for changing commute mode by normal commute mode used (travelling to work)



QWORKMODE. You indicated that in the past 7 days you have travelled to work using a different mode to what you would have during a normal week. (e.g. in February of this year) For which, if any of the following reasons did you change the way that you travelled to work?

Base: all adults 15+ in New Zealand who have changed commute mode in waves 10, 11, 12, 13, 14 or 15





Section 7 – Perceptions of transport modes

Key findings – perceptions of transport modes

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

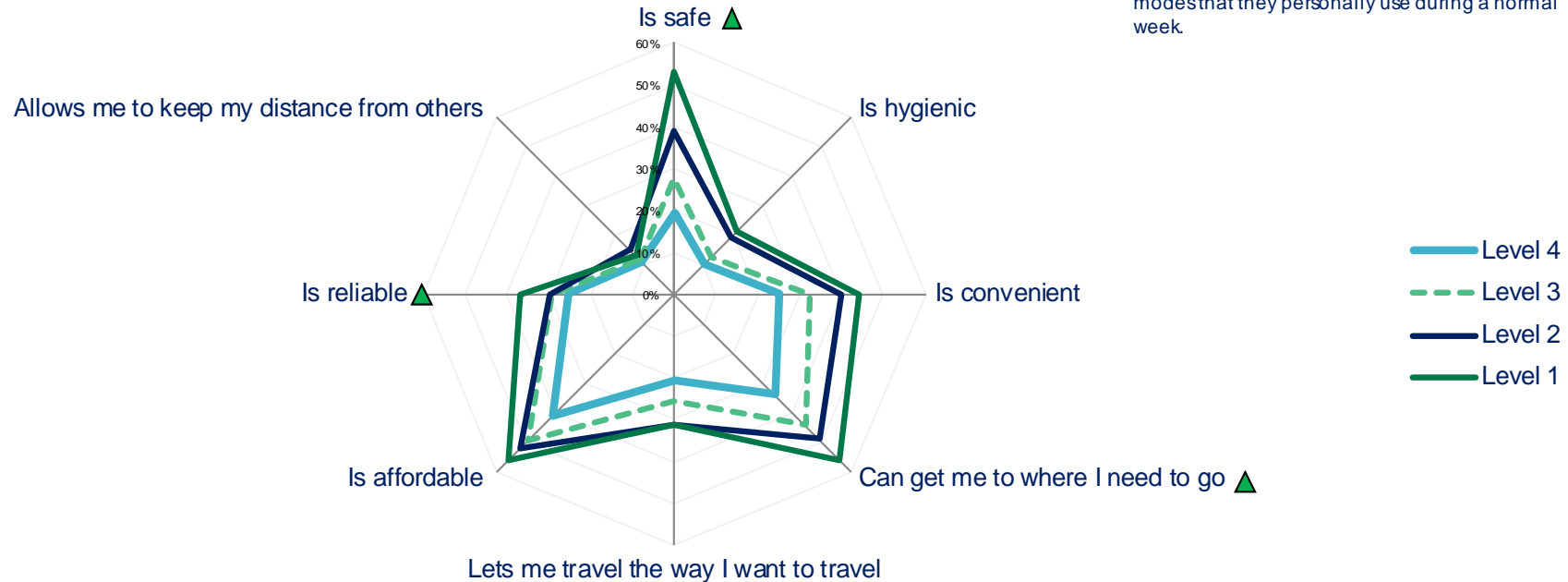
- The COVID-19 environment may over time change the way that New Zealanders perceive different modes of transport. This will be important to understand as these perceptions may impact people's travel patterns and behaviour.
- For trains and buses, a lot of perceptions have improved over time, but one thing that has not shifted is the capacity for social distancing, which appears to be more of a fixed perception around public transport modes and generally immovable within the public consciousness.
- Taxis and ubers have also improved on many perceptions through the levels, in particular improving the perception of social distancing capabilities from level 3 onwards.
- Generally perceptions of active modes were better in level 3 before dropping off in many places, this was particularly the case for cycling which was much better perceived before the return of other vehicles to the roads.



With each COVID-19 alert level, the proportion saying that buses are safe, convenient and can get them where they need has increased

Perceptions of the bus

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

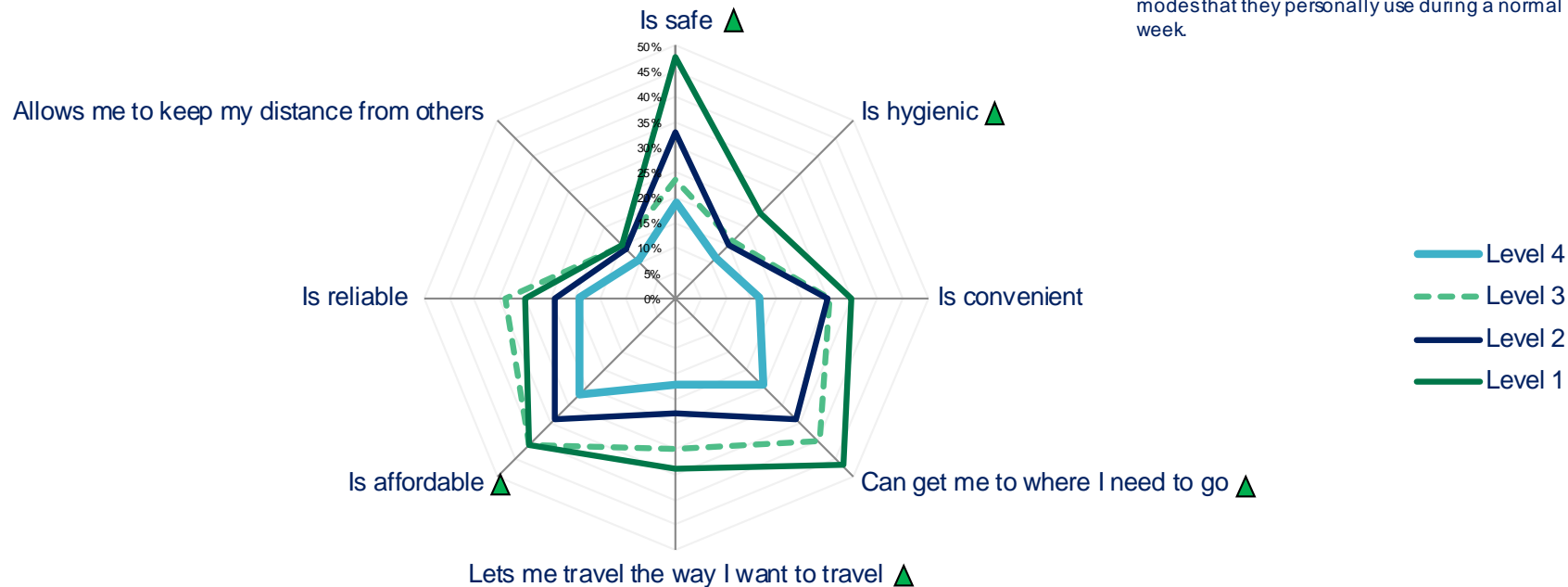


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by Bus normally: level 4 (n=943), level 3 (n=452); level 2 (n=979); level 1 (n=1,192)

Perceptions of travel by train are broadly better overall in level 1, with the exception of reliability and capacity for social distancing

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=405); level 1 (n=443)

Private hire vehicles are also perceived as better in level 1 than they were in previous levels on almost every metric, with affordability the exception

Perceptions of taxi / uber

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

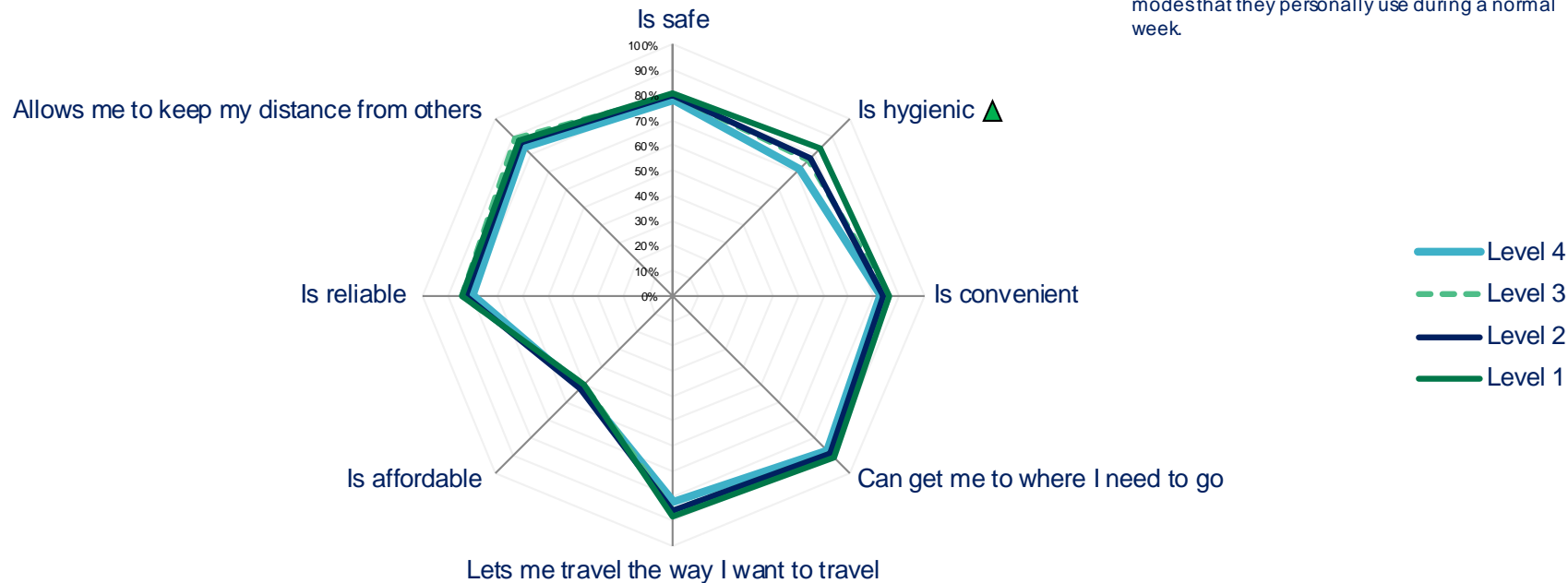


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: New Zealanders who normally travel by Uber / Taxi: level 4 (n=355), level 3 (n=164); level 2 (n=471); level 1 (n=498)

Perceptions of travelling by car have been stronger than other modes and the least likely to change from level to level

Perceptions of car / van

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

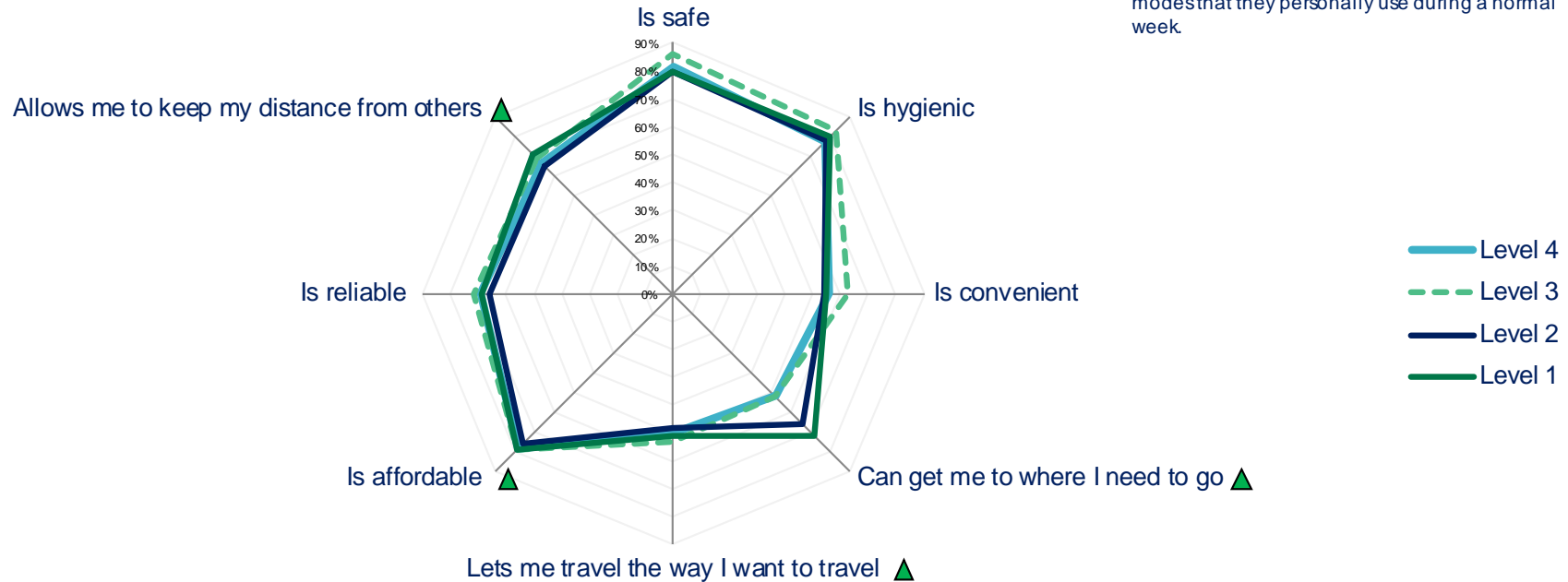


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: New Zealanders who normally travel by Car / Van: level 4 (n=1,453), level 3 (n=746); level 2 (n=1,584); level 1 (n=1,861)

In level 1, there has been a statistically significant increase in the proportions who say walking can get them where they need to go and travel how they want

Perceptions of walking

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

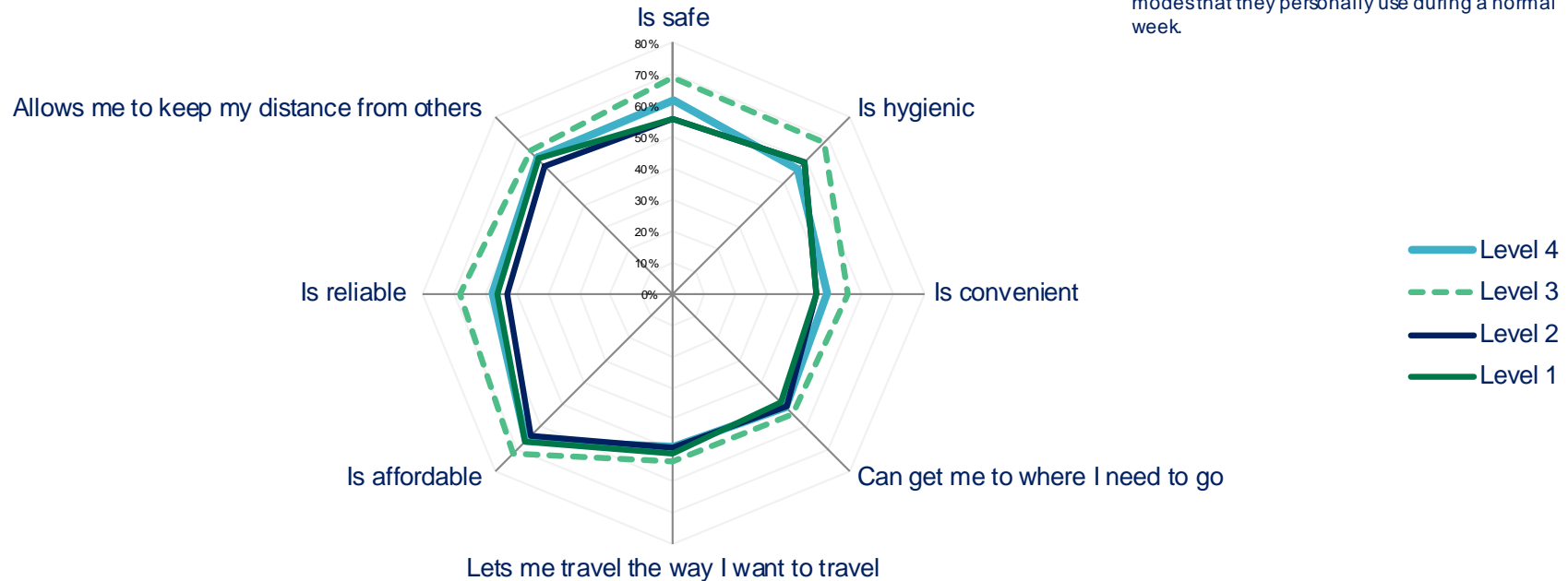


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: New Zealanders who normally use walking as a means of travel: level 4 (n=1,445), level 3 (n=736); level 2 (n=1,579); level 1 (n=1,840)

Perceptions of cycling as a transport mode have generally weakened since level 3 and have changed little since 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=795); level 1 (n=856)

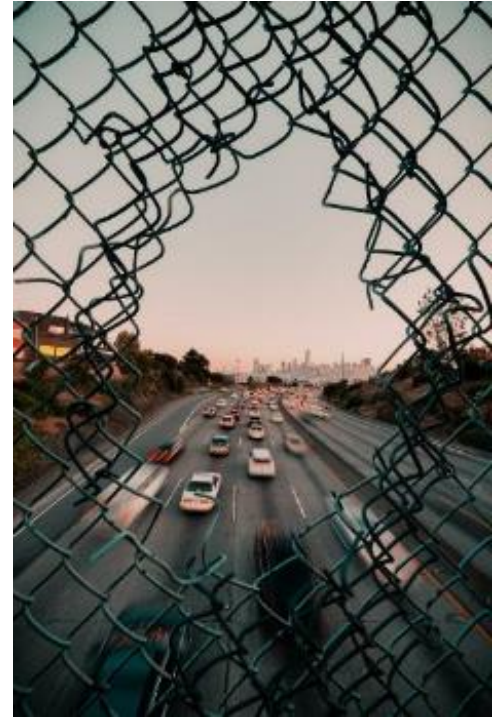


Section 8 – Anticipating change

Key findings – anticipating change

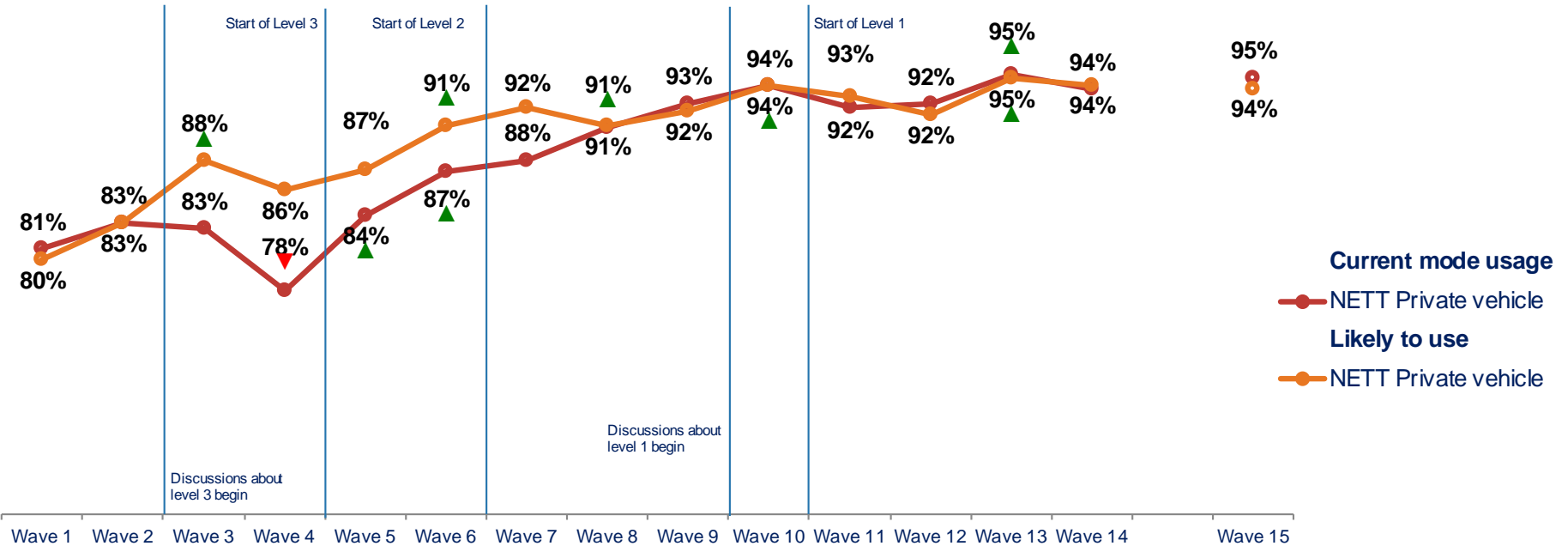
Waka Kotahi objective – do people anticipate changes and change journey behaviour?

- With the capacity to take a retrospective look at behaviours within 16 weeks of COVID-19 alert conditions, we can now observe how future mode consideration may or may not have been indicative of actual future travel behaviour.
- For private vehicle usage, consideration and usage are both closely intertwined. From the middle of alert level 2, the gap between consideration and stated usage of cars, vans and motorcycles disappeared as people returned to these modes faster than any other transportation option.
- Conversely, for active modes this gap widened somewhat from the start of level 2 onwards as more people began to return to work. Since this time, consideration of active modes has been completely stable at around 71%, whilst actual usage has not increased to meet it during colder and wetter weather conditions.
- When it comes to public transport, consideration is more of a lead indicator of actual usage. At several points during lockdown, statistically significant increases in public transport consideration have occurred one or two weeks before a statistically significant increase in the number of weekly users.
- However, this isn't universally the case, particularly under level 1 conditions, where consideration has spiked at times but stated weekly usage has remained stable.



Private vehicle consideration and mode usage converged during level 2 and has matched very closely ever since

Current mode usage vs mode consideration (private vehicle)



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; Wave 1 (n=1,249); Wave 2 (n=1,247); wave 3 (n=1,217); wave 4 (n=1,286), wave 5 (n=1,244), wave 6 (n=1,255), wave 7 (n=1,244), wave 8 (n=1,238), wave 9 (n=1,234), wave 10 (n=1,243), wave 11 (n=1,250), wave 12 (n=1,245), wave 13 (n=1,249), wave 14 (n=1,212), wave 15 (n=1,256)



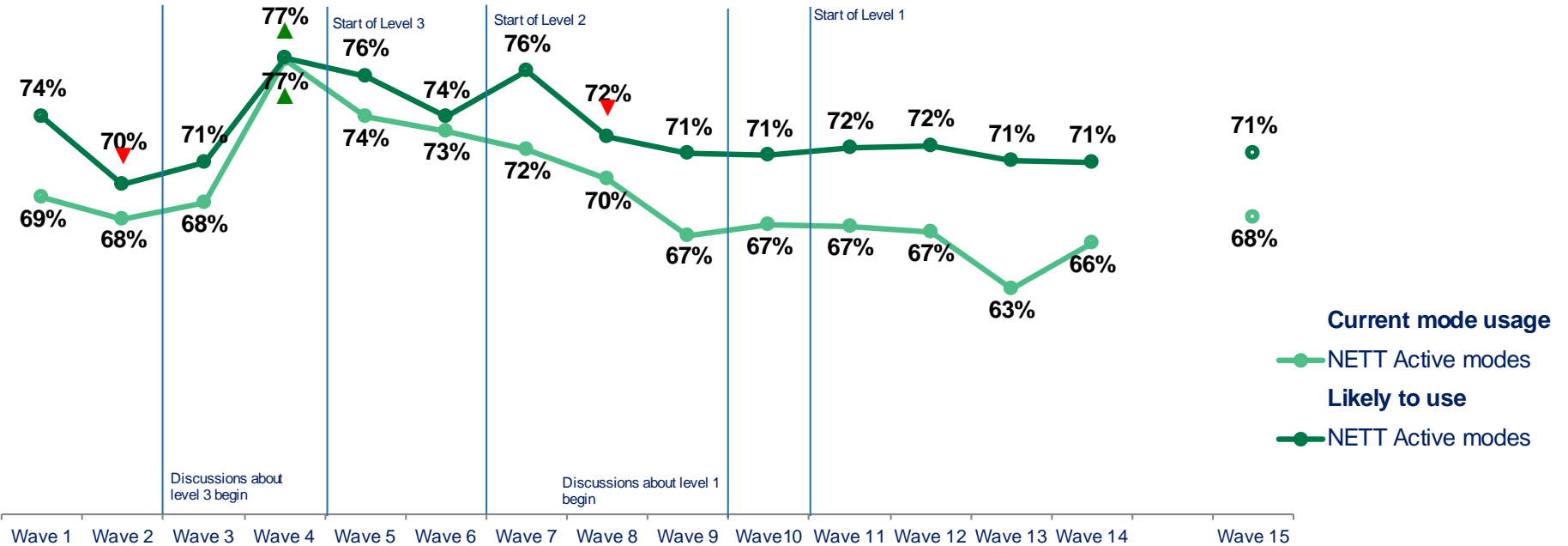
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Stated consideration of active modes has remained stable since the middle of level 12, but travel by these modes has perhaps been more responsive to weather

Current mode usage vs mode consideration (active modes)



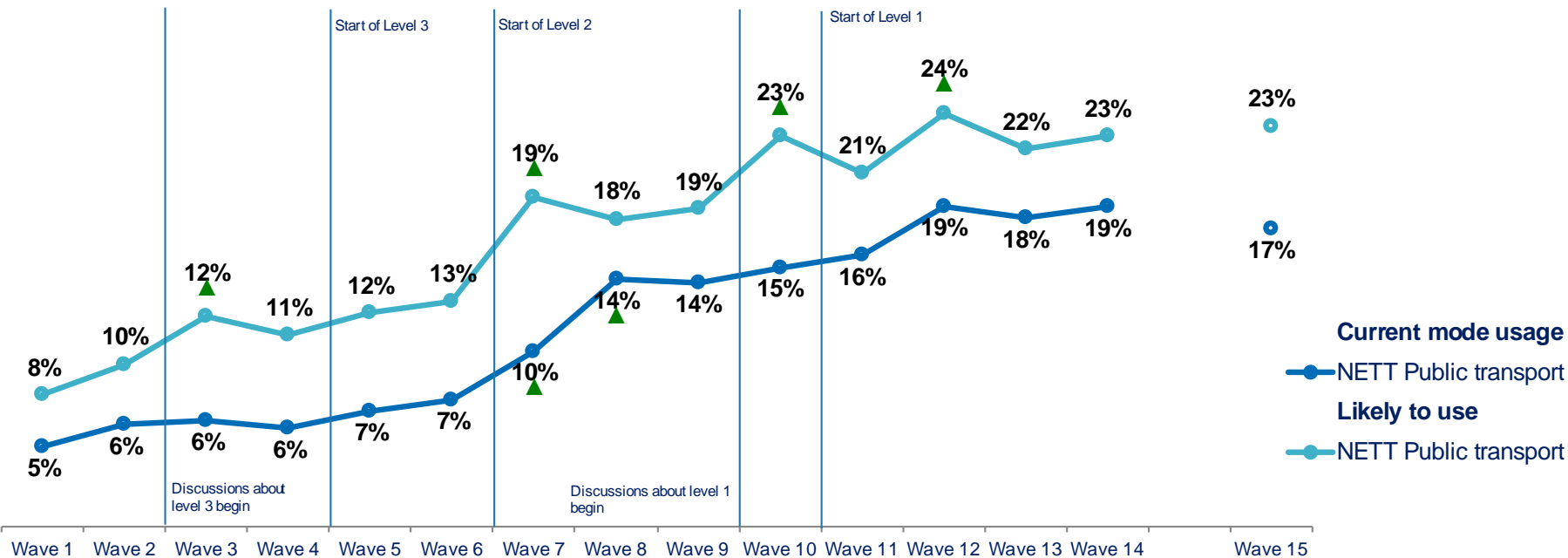
QPT2. If available next week, which if any of the following would you be likely to use?

Base: all adults 15+ in New Zealand who normally travel; Wave 1 (n=1,249); Wave 2 (n=1,247); wave 3 (n=1,217); wave 4 (n=1,286), wave 5 (n=1,244), wave 6 (n=1,255), wave 7 (n=1,244), wave 8 (n=1,238), wave 9 (n=1,234), wave 10 (n=1,243), wave 11 (n=1,250), wave 12 (n=1,245), wave 13 (n=1,249), wave 14 (n=1,212), wave 15 (n=1,256)



At certain points, consideration has been indicative of passengers returning to public transport, particularly at the start of level 2

Current mode usage vs mode consideration (public transport)



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

Base: all adults 15+ in New Zealand who normally travel; Wave 1 (n=1,249); Wave 2 (n=1,247); wave 3 (n=1,217); wave 4 (n=1,286), wave 5 (n=1,244), wave 6 (n=1,255), wave 7 (n=1,244), wave 8 (n=1,238), wave 9 (n=1,234), wave 10 (n=1,243), wave 11 (n=1,250), wave 12 (n=1,245), wave 13 (n=1,249), wave 14 (n=1,212), wave 15 (n=1,256)





Section 9 – Going forward with domestic and international tourism

Key findings – going forward with domestic and international tourism

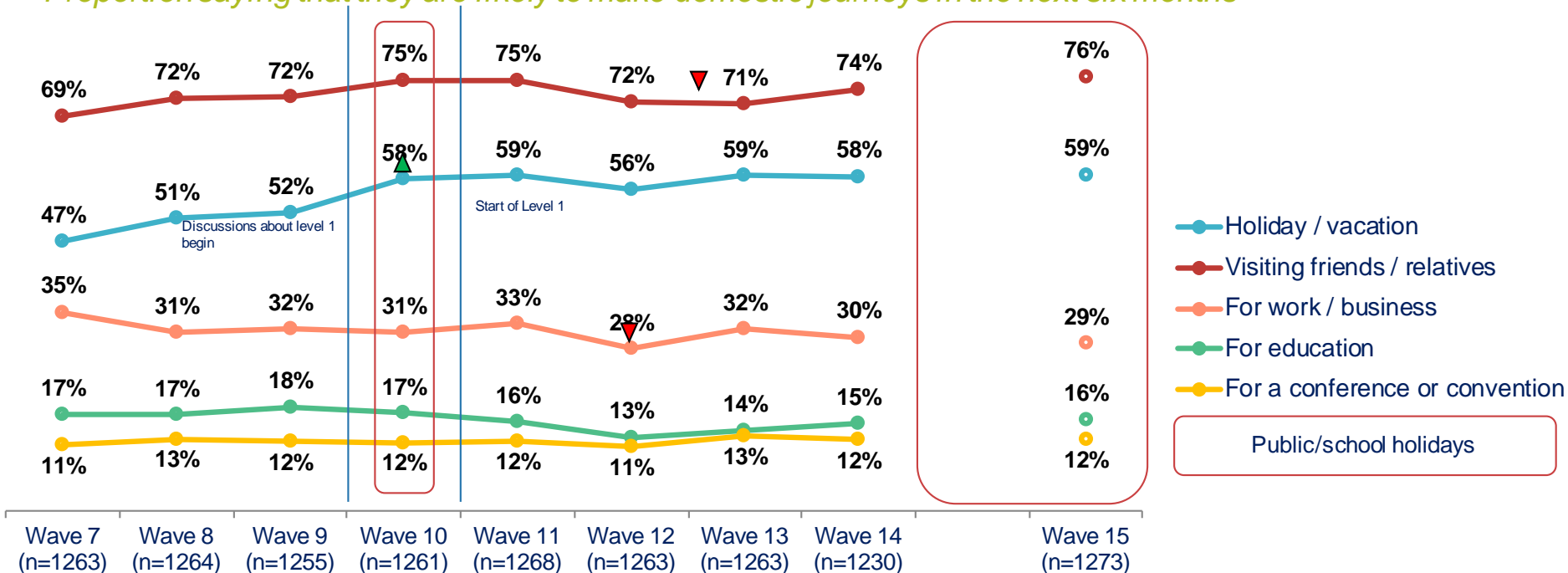
Waka Kotahi objective – how will domestic & international tourism change going forward?

- New Zealand has begun to open up internally to domestic travel while borders remain closed. It is important to understand how domestic tourism in this context will make up a large proportion of the longer distance on the transportation network.
- Despite continued consideration of certain types of domestic tourism travel, it is still the case that more expect to decrease their volume of travel than to increase and that as a result, the NET change in domestic tourism is going to be negative in the coming year.
- It is also important to recognise how quickly international travel would be taken up were borders to be opened in the future.
- Were this to happen, more than two thirds would begin planning an international trip, with Australia the main destination that people would consider. This might not be immediate, with the majority of Australia trips planned for six or more months in the future.



The proportion considering visiting friends/family has trended up since wave 12, but consideration of work trips has decreased since measurement began

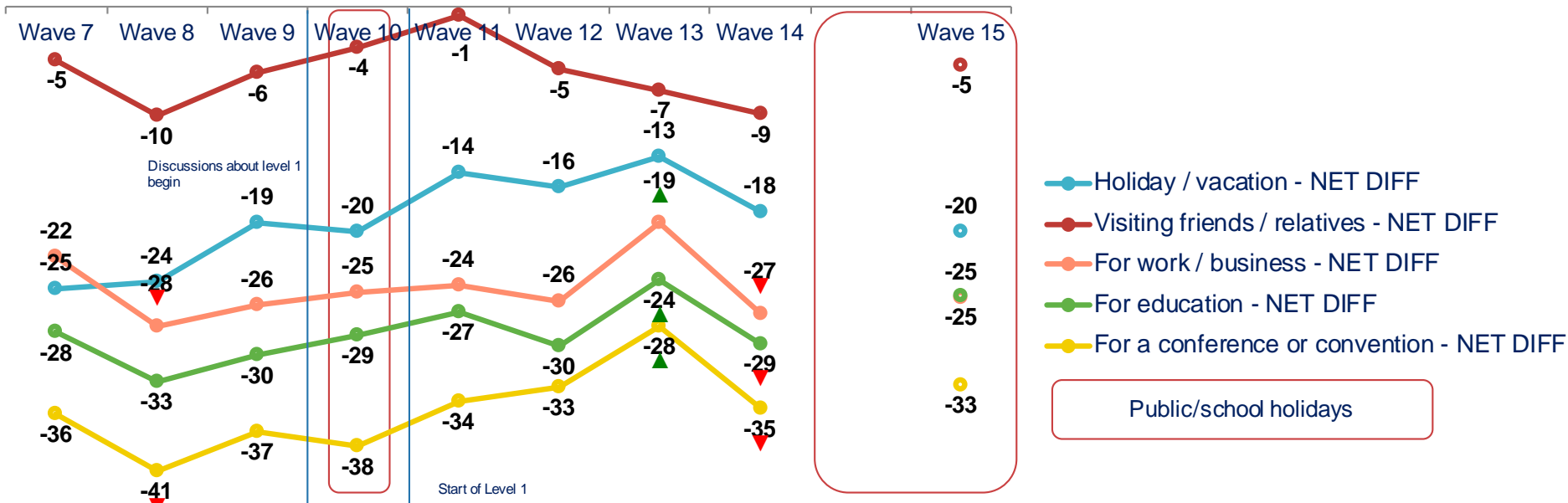
Proportion saying that they are likely to make domestic journeys in the next six months



FDT1. How likely are you to make following types of domestic journeys in the next six months?
 Base: all adults 15+ in New Zealand

The projected NET change in friends/family visits has turned around in wave 15, but overall, responses suggest that all types of travel will be lower than during 2019

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



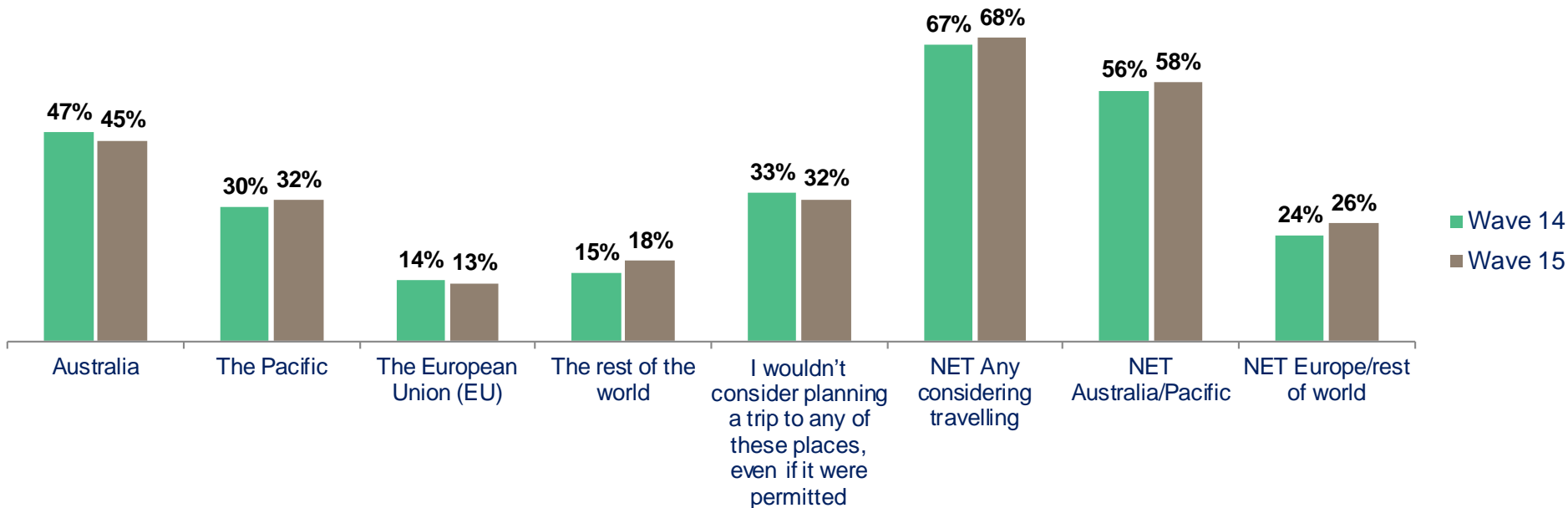
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

At this stage, there has been no significant change in consideration of international travel destinations, or the proportion considering travel at all

Proportion who would consider travelling to each location in the next 12 months

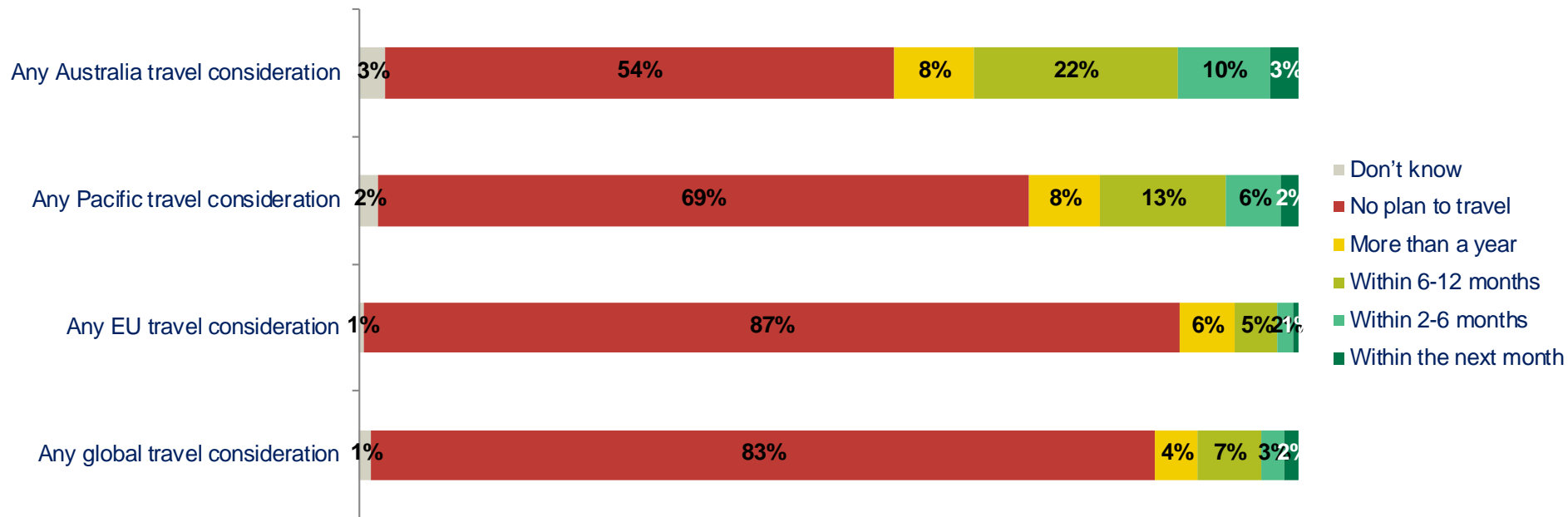


FIT1: Which, if any of the following places would you personally consider travelling to in the next 12 months, either for work, education or leisure purposes such as a holiday?

Base: all adults 15+ in New Zealand in wave 14 and 15 (n=2,503)

Were borders to open today, Australia would receive the largest proportion of New Zealand visitors within the next 12 months

Proportion who would consider travelling to each location in the next 12 months



FIT1A/FIT1B/FIT1C/FIT1D: If this sort of travel were permitted today, how soon do you think you would plan to travel to Australia/the Pacific region/ the EU/ somewhere internationally for each purpose?

Base: all adults 15+ in New Zealand in wave 14 and 15 (n=2,503)

