

Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–18 core report

1 September 2020

Disclaimer

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

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

For more information on the COVID-19 weekly tracker contact:
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Report content

COVID-19 transport impact

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Section 1 – About this research

Study purpose and importance

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

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

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

- such as trip frequency and journey type changes.

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

- such as perceptions/attitudes towards COVID-19 and travel options.

To include sufficient respondent numbers to understand how this varies across region and cohorts of interest

- such as different employment types (work from home, essential workers, etc.), vulnerable groups (elderly, immune compromised, etc), DHB, etc.

To provide updates in a timely fashion so actions and planning can respond to the evolving situation.

The **importance of this research** cannot be understated:

There has been a major disruption to travel habits that will have long-lasting impacts on society:

- Where and how people choose to work, and how they choose to travel will change.
- Where people choose to travel domestically will change.
- How these changes will play out in the medium to long-term is unknown.

Without regularly updated knowledge on **what people are thinking and feeling**, and **why they are choosing** to travel the way they do, we won't be able to quantify how people are responding to COVID-19, and without this we won't know how best to respond and how we are able to influence travel habits.

- With regularly updated knowledge on COVID-19's impact, we can quantify how road usage and modal choice is changing, and we will know how to respond and influence future travel habits.

Overview of research (i)

Research design and outputs

The **design of the tracker** ensures we can undertake analysis at various levels for different purposes, and for different stakeholders.

The study is an online quantitative survey that is a nationally representative sample of New Zealanders 15+ years old, with a sample of ~n=1259 per wave, using quotas and data weighting.

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

Average survey duration of between 12-15 mins

- Outside core measures, flexibility to change questions every week

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

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

*For waves 1 – 14 fieldwork and reporting was undertaken weekly, for waves 15 and 16 fieldwork and reporting was undertaken bi-weekly, while wave 17 fieldwork and reporting was undertaken three weeks after wave 16 as fieldwork was brought forward from an intended monthly cycle due to an outbreak of COVID-19 community cases.

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) Regular* 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
 - visually representative of results for ease of access.



Example: Harmoni dashboard page

Overview of research (ii)

Question topics in the survey

Question areas covered in the research:

Level of personal concern of the impact of COVID-19

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

Current essential journeys and domestic travel undertaken and changes

- change is measured since February 2020.

Modal shift patterns and perceptual shifts

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

Measuring attitudinal shifts towards COVID-19

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

Questions to classify into a variety of segments of interest

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

Ad hoc questions of interest

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

Report notes (i)

Key information to note for this report

- This report is based on eighteen waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of the first four fieldwork waves, combined sum of waves 5 and 6, combined sum of waves 7, 8, 9 and 10, combined sum of waves 11, 12, 13, 14, 15, 16 and the combined sum of wave 17 and 18 as well as individual waves where appropriate.
- The focus of this report is tracking trends and changes over time and how New Zealanders have adjusted their use of transport and travel behaviour. As this study was not conducted prior to level 4 restrictions, respondents were asked to recall their transport and travel behaviour prior to level 4 restrictions based on a 'normal week' ie in February this year.
- At a total population level, significance testing indicated in this wave 18 report is based on a statistically significant shift of results between waves 1 to 18, as well as statistically significant shifts from combined level 4 alert results vs combined level 3 alert results vs combined level 2 alert results vs combined level 1 vs combined level 3/2 alert results to date
- At a sub-population level, significance testing indicates a statistically significant difference between the sub-population and the base or total population. The total population benchmark is based on the total sample base collected across the first four waves of data.

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

Sample structure and further definitions

	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 – 16		Wave 17-18	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MOE*
Total		n=5,060	1.38	n=2,532	1.95	n=5,043	1.38	n=7,561	1.13	n=2,455	1.98
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=1,324	2.69	n=1,964	2.21	n=661	3.81
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=599	4.0	n=200	6.93
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0	n=200	6.93
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=1,129	2.92	n=311	5.56
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=601	4.0	n=200	6.93
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=607	3.98	n=200	6.93
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=1,328	2.69	n=2,061	2.16	n=683	3.75
Disability, Vulnerability and COVID-19**											
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=866	3.33	n=284	5.82
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=1,640	2.42	n=584	4.06
Aged 70 + years	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over	n=618	3.94	n=315	5.52	n=627	3.91	n=830	3.4	n=266	6.01

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

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

Report notes (ii)

Key transport terms and demographic groupings

There are a number of transport terms used in this report. Below are key terms with definitions:

Public transport (PT): refers to bus, train and ferry and does not include taxi/uber services and private hirer vehicles (these will be treated separately in the analysis).

Private vehicle (PVT): refers to car, van, motorcycle or scooter, and does not include e-bikes.

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


There are a number of demographic subgroup terms used in this report. Below are key groups with definitions:

Any disability: All respondents indicating that they have a great deal of difficulty or cannot do the following: seeing, even when wearing glasses; hearing, even with a hearing aid; walking or climbing steps; remembering or concentrating; washing or dressing; communicating in their usual language.

COVID-19 vulnerable: All respondents indicating that they personally have a medical condition that makes them acutely vulnerable to COVID-19, such as heart disease, hypertension, chronic respiratory disease or cancer.

Context: New Zealand COVID-19 timeline




A background image showing a group of cyclists and a pedestrian on a paved path. The scene is outdoors with trees and a bright sky. A diagonal blue overlay covers the top-left portion of the image. The text 'Section 2 – Waka Kotahi transport key findings summary' is overlaid on the blue area.

Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1–18

Waka Kotahi COVID-19 transport impact tracker

- Wave 18 of fieldwork is the second wave under a split level condition, with Auckland under level 3 for the preceding week and the rest of New Zealand under level 2. Immediately following the end of fieldwork, Auckland would move to level 2 to match the rest of New Zealand.
- Auckland has seen a directional pivot from health and transmission concerns towards economic concerns arising from COVID-19, with economic concerns now as common as health concerns. Outside of Auckland, concerns about transmission and infection continue to rise, with economic concerns less salient.
- Within this context, self isolation behaviour has not changed greatly throughout the country, but remains understandably higher in Auckland.
- Non-essential and inter-regional journey types have not recovered following a fall at the start of the new lockdown. However, there has been something of a recovery in reported Auckland commuter journeys, with an 11 point increase in the proportion reporting that they've travelled for work in the city at least once during the week.
- The second week under a mixed level lockdown has not seen a material change in mode usage, save for a small increase in active mode travel due to a national increase in walking.
 - Public transport use continues to be suppressed, but within Auckland there are early signs of a recovery as future public transport consideration increases. However, the same signifiers are not present outside of Auckland, suggesting that recovery may be slower here, given that there will not be a change in alert levels.
 - Reported reduced need continues to be the main thing keeping travellers off public transport, with a marked increase in this barrier during the most recent wave, while a reduction in alert levels remains the primary trigger to passengers returning.
- Forms of mass transit like buses and trains have been most impacted in terms of passenger perceptions, both in Auckland and in other regions. Their key areas of weakness under the current alert level have been reliability, safety and hygiene, although image perceptions have decreased for them across the board.
 - This pattern is present across the whole of New Zealand, and not just Auckland where lockdown conditions have been more severe.
- In line with the increased reported work journeys, the proportion reporting that they work from home has decreased in Auckland to rates seen during level 1.
 - During the new lockdown, CBDs have been more impacted by the loss of commuters than other regions of the country, possibly reflecting the focus of the lockdown on Auckland.
- Mask access is encouragingly common across New Zealand, and particularly so among those who would normally use public transport, almost all of whom claim to have access to a mask.
 - Mask access has also increased now that it is compulsory on public transport, with this increase driven by purchasing rather than making masks.
- Nationally, the new lockdown hasn't materially impacted on the shopping channels that New Zealanders choose to use. However, within Auckland there has been a statistically significant increase in the usage of online supermarkets and a steady directional increase in the use of online specialist retailers.
 - In terms of the shopping experience, Aucklanders currently describe this as being harder than those outside of Auckland do. For those outside of Auckland, more than half say the experience is no different to what it was in February.

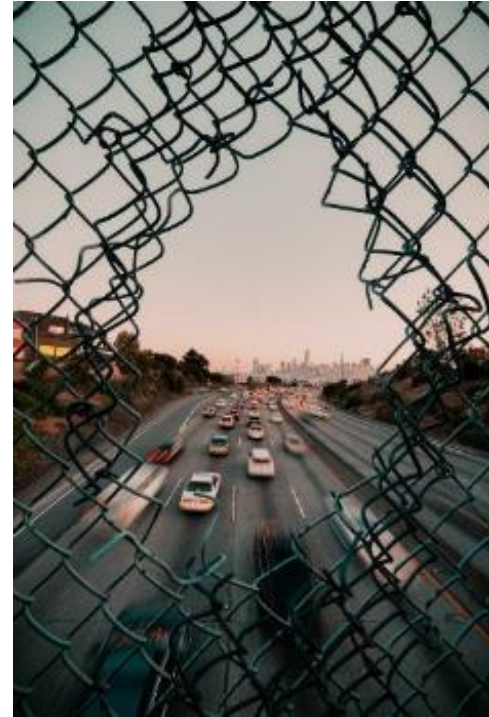
The background image shows a park scene with people engaged in outdoor activities. In the foreground, a person is walking away from the camera, carrying a bag. In the mid-ground, two people are riding bicycles. The scene is set in a lush, green park with trees and a clear sky. A diagonal blue overlay is present on the right side of the image.

Section 3 – Context

Key findings – context

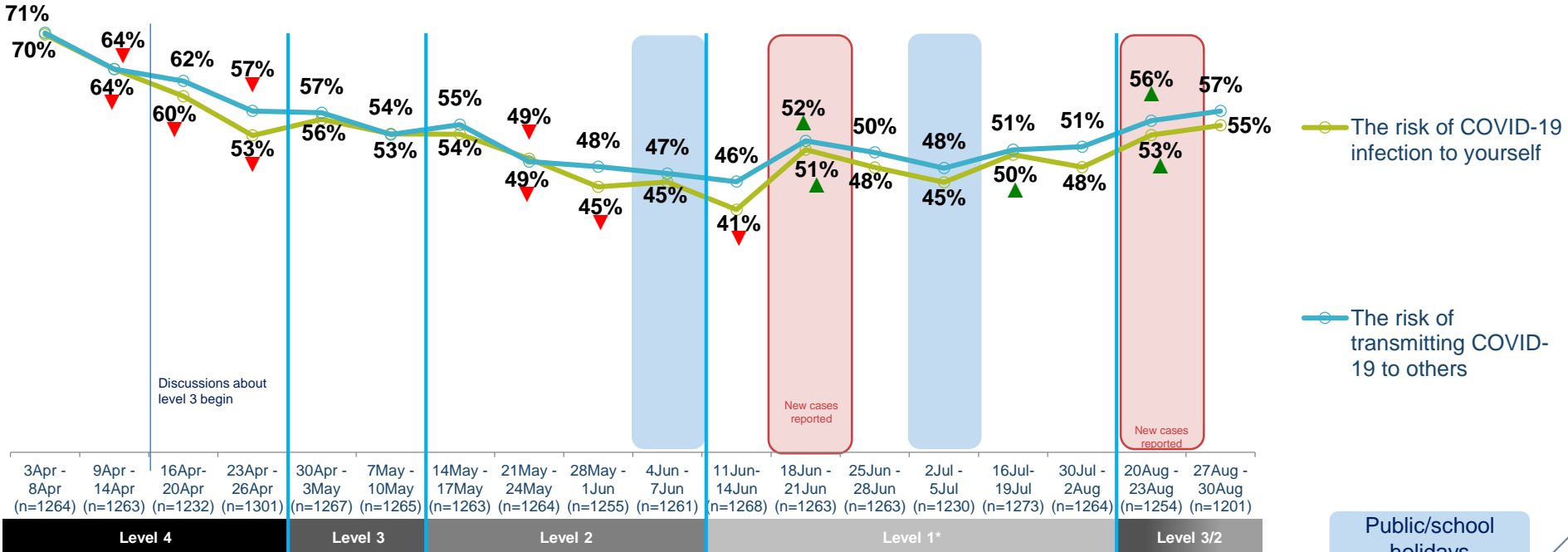
Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- Understanding attitudes around COVID-19 provides the context in which journey and mode changes can be viewed. General fears and attitudes may work as external factors influencing the choices that New Zealanders make.
- The latest wave of fieldwork took place following two weeks of level 3 lockdown in Auckland and level 2 elsewhere in New Zealand, after community transmissions in Auckland.
- In this context, concerns about risk of infection to yourself and transmission to others did not increase significantly nationally. While these concerns are beginning to wane slightly within Auckland, they are increasing somewhat elsewhere.
- Inside of Auckland, it is economic concern that is growing, with a directional increase in those worried about their personal finances, job losses and the economy of New Zealand in general.
- These economic concerns did not increase in prevalence elsewhere in New Zealand.
- As transmission concerns remain relatively stable nationally, so too have rates of self isolation, which have not increased significantly nationally.
- Outside of Auckland, the continuing increase in transmission and infection concerns has not caused people to self-isolate any more than they did previously.



Nationally, concerns about infection and transmission remain at similar proportions to those seen in previous level 3, but have not increased significantly this week

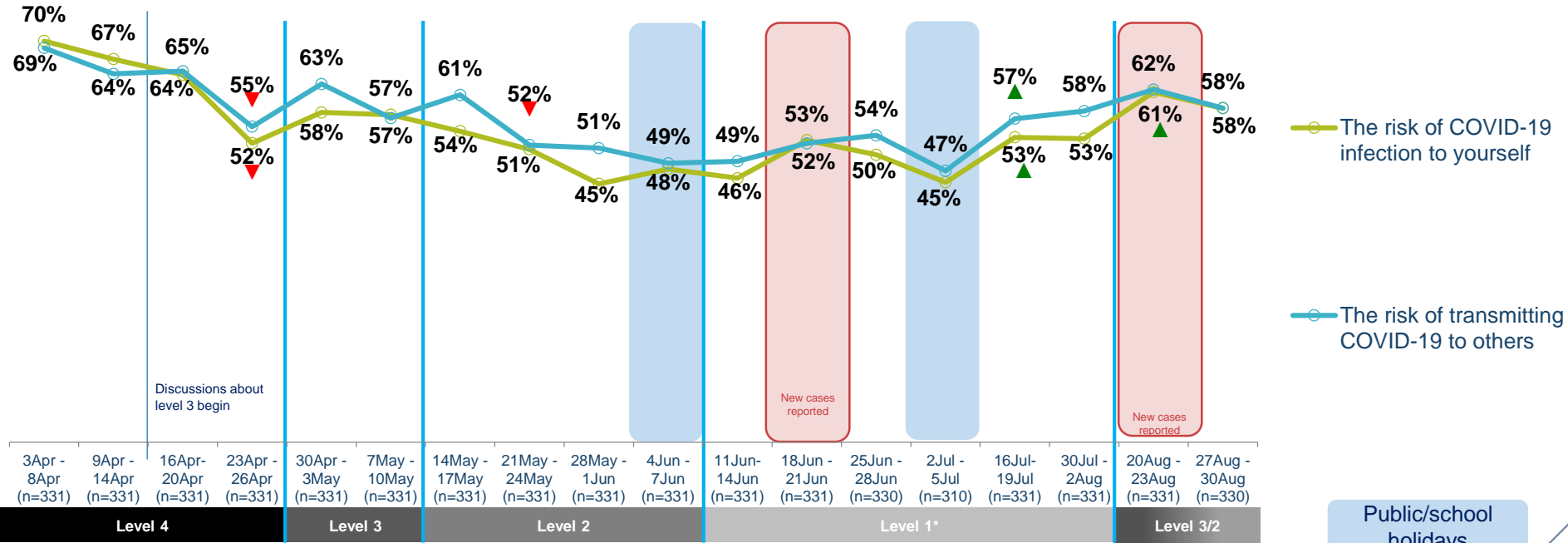
COVID-19 concerns (NETT all concerned)



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

In Auckland, concerns of this nature have actually decreased directionally, although this change is not statistically significant

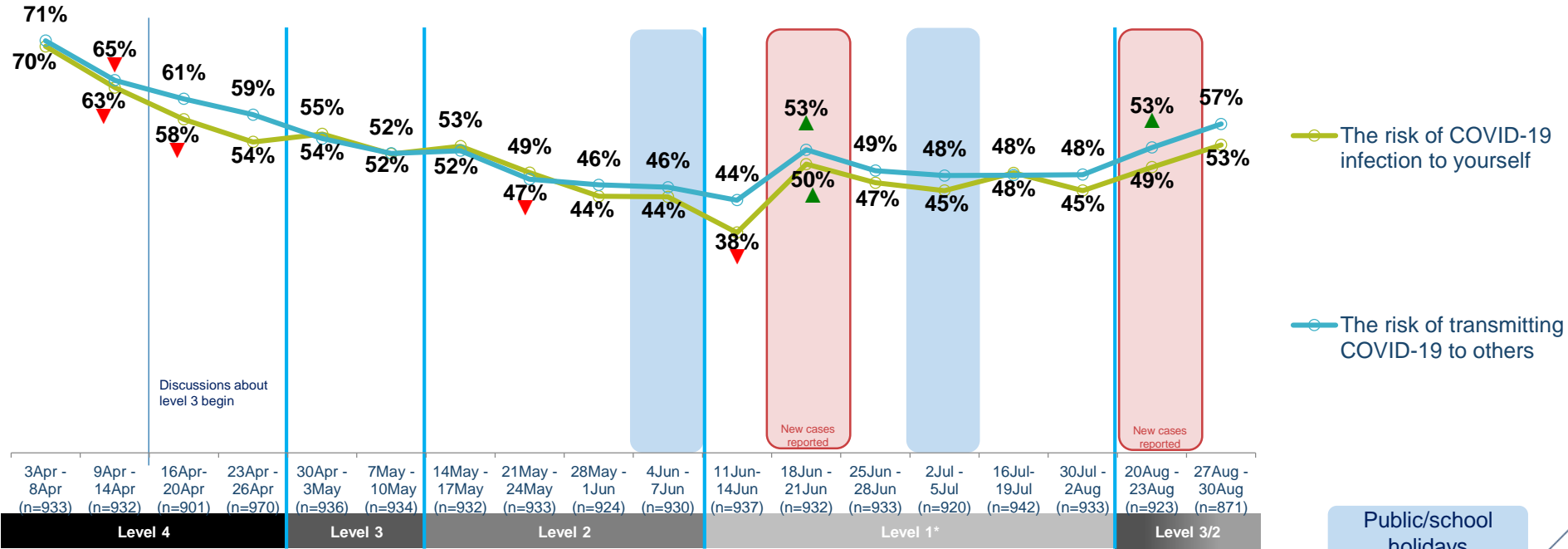
COVID-19 concerns (NETT all concerned)- Auckland



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

Outside of Auckland, concerns have directionally increased as the level 3 Auckland lockdown approaches an end

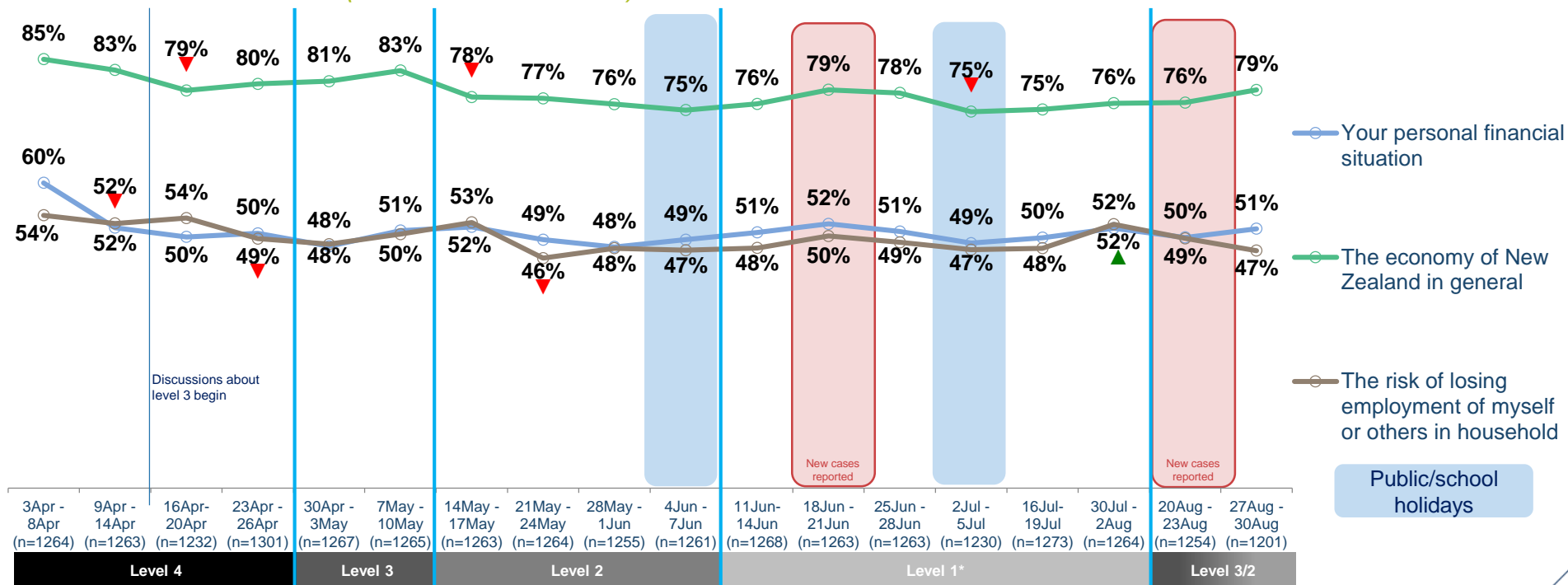
COVID-19 concerns (NETT all concerned) – rest of New Zealand



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

Nationally, there has been a directional increase in concerns about the economy and personal finance, although there is less concern about job loss

COVID-19 concerns (NETT all concerned)



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

Base: all adults 15+ in New Zealand



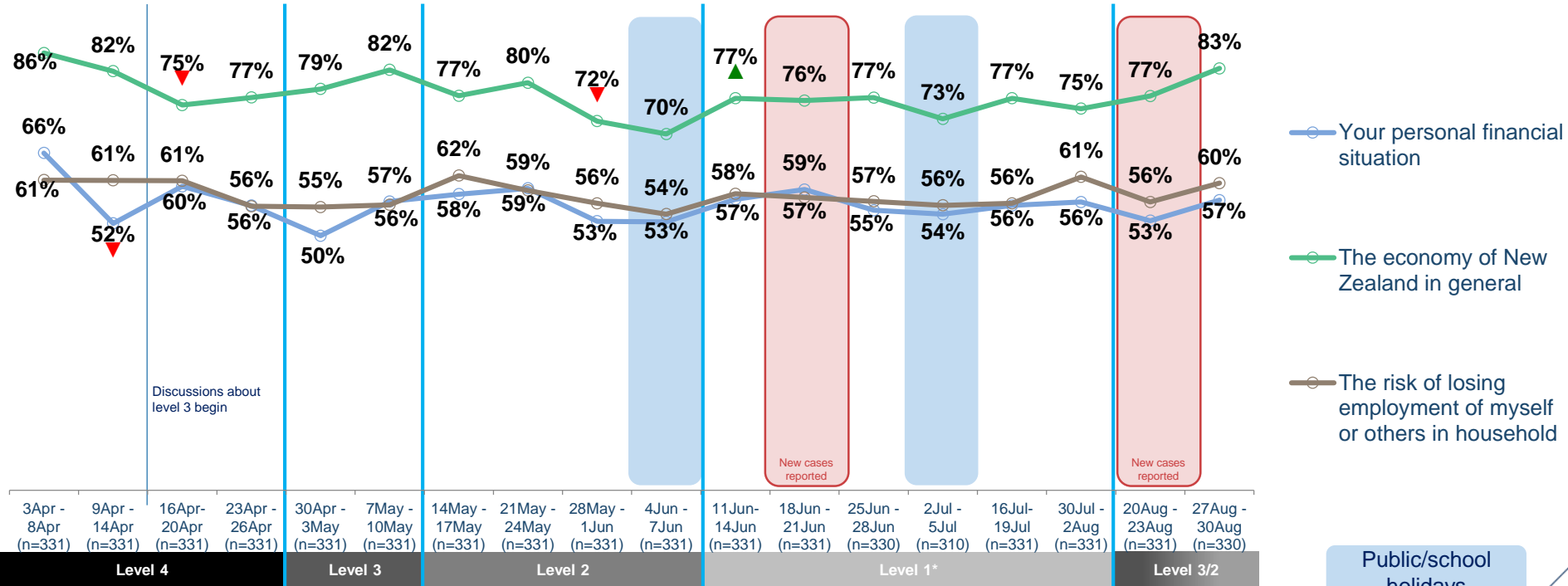
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Regionally, Auckland has been the main driver of increasing concerns about personal finances and the economy

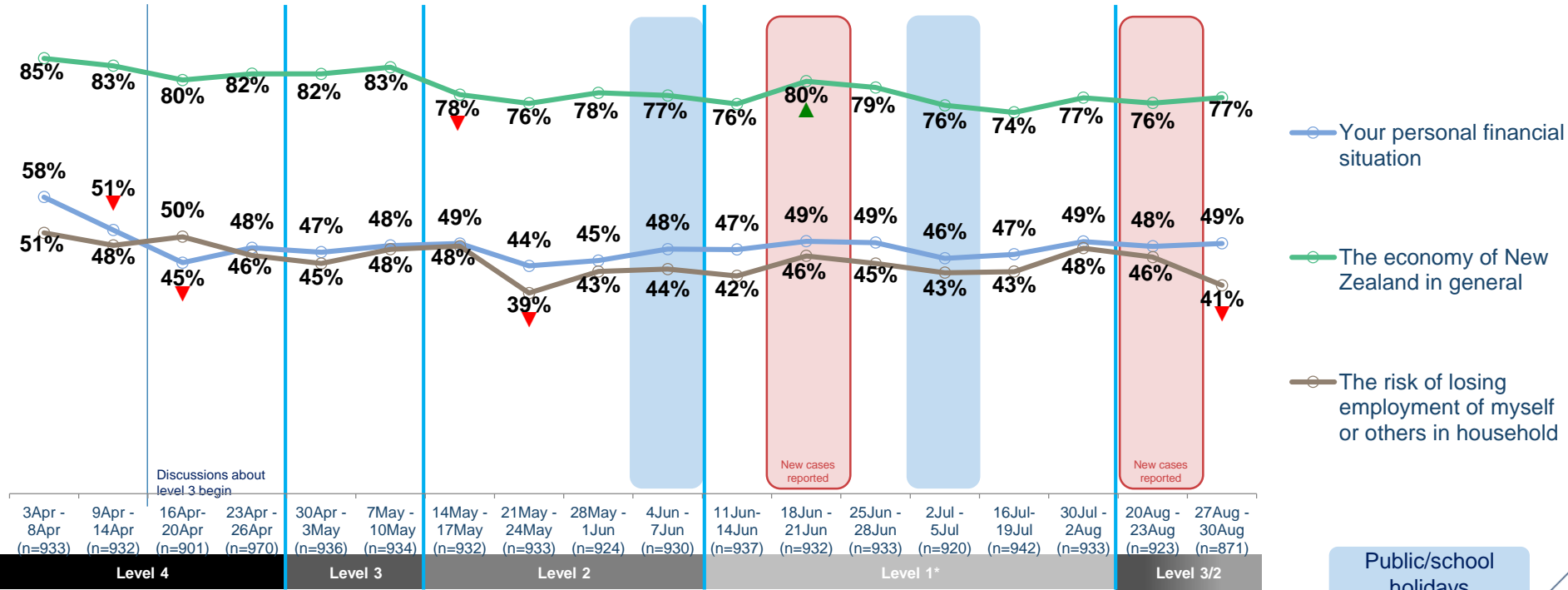
COVID-19 concerns (NETT all concerned) – Auckland



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

Meanwhile, concerns about the economy and personal financial situation remained stable outside of Auckland, with a significant decrease in concern about job losses

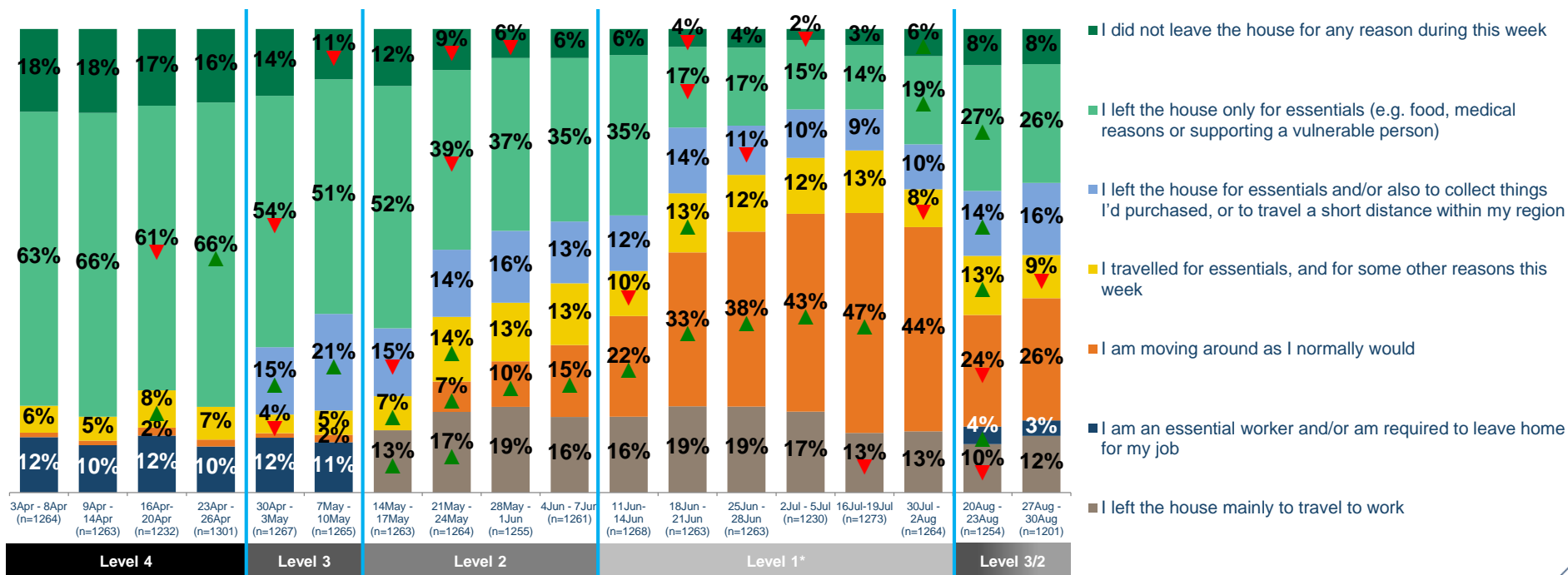
COVID-19 concerns (NETT all concerned) – rest of New Zealand



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

Patterns of movement across the country generally remained stable in the second week of the split lockdown

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



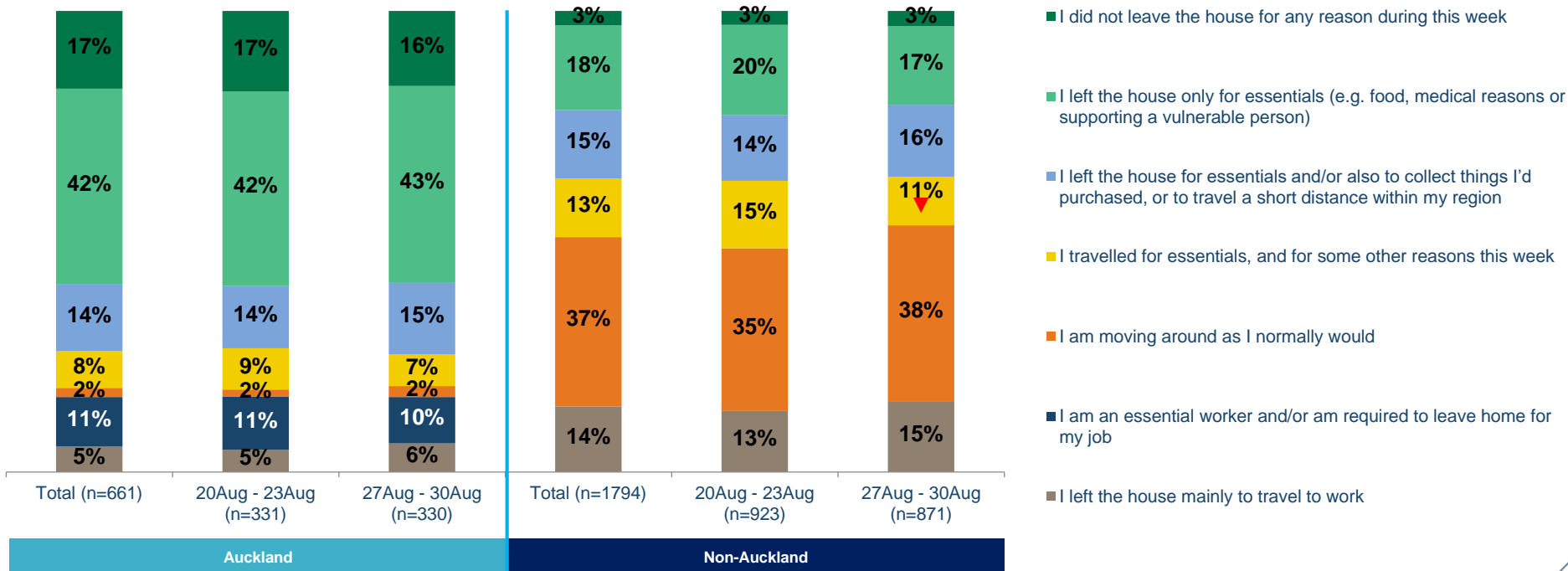
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Levels of self isolation did not increase or decrease significantly within or outside of Auckland

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

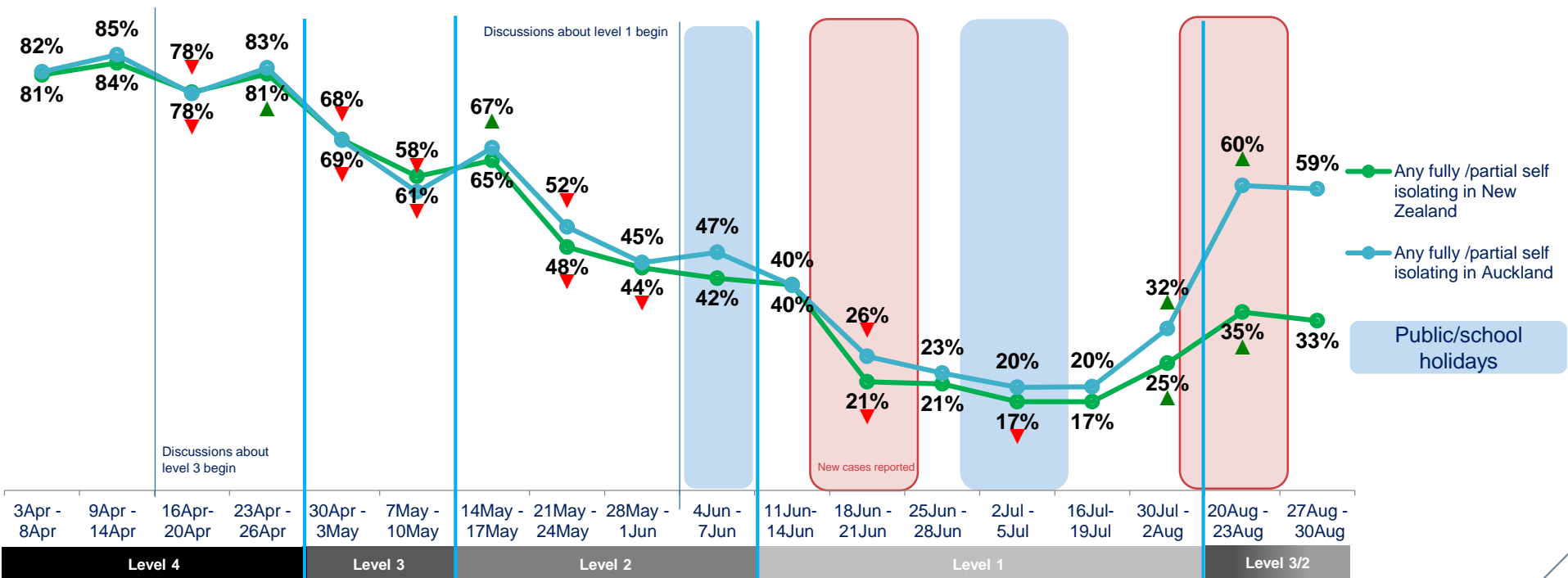


ISO_1_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?
 Base: all adults 15+ in New Zealand



Full or partial self isolation in Auckland remained stable this week, but is still close to double that seen across the country as a whole

Self isolation over time



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

Base: all adults 15+ in New Zealand – Wave 17 only



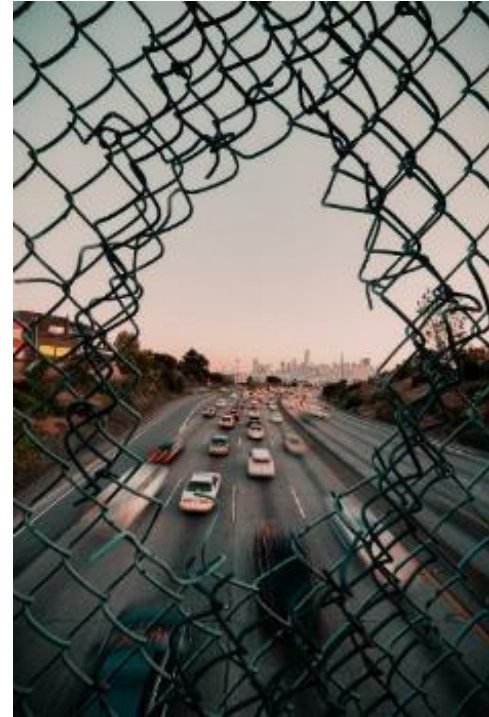


Section 4 – Local and domestic journeys

Key findings – Local and domestic journeys

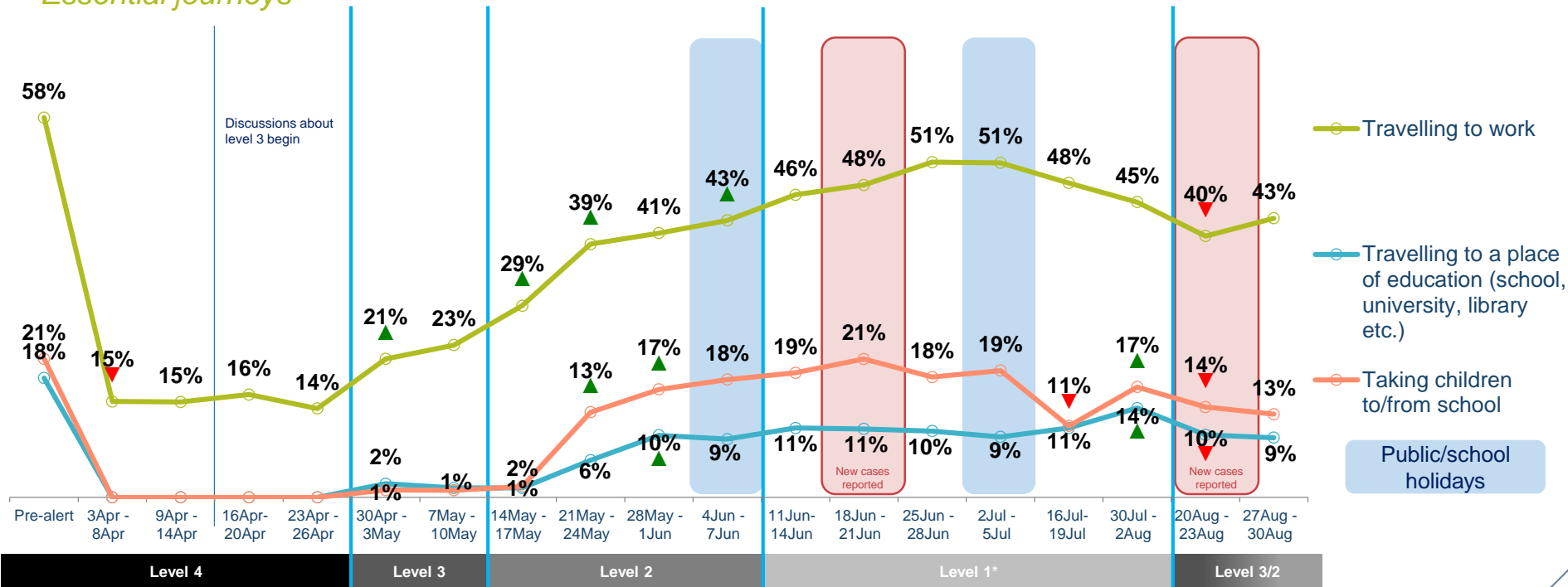
Waka Kotahi objective – how is travel changing?

- To understand how travel is changing across the COVID-19 risk levels, we have been tracking changes in journeys made at a local and national level as and when they have been permitted under lockdown conditions.
- With a split level lockdown applied across the country, the impact on journeys taken continues to be regionally variable.
- Work journeys recovered significantly within Auckland. Having previously fallen to rates comparable to level 3, these are now reported at rates comparable to level 2. It is important to note that this may not be a full return of daily journeys, but a rise in those reporting at least one work journey in a week.
- Outside of Auckland, the proportion taking each type of daily journey has not materially increased or decreased.
- Non-essential and inter-regional journey types have both remained at a lower level and not recovered during the second week of the new lockdown.



Nationally, there has been a small increase in the proportions travelling to work, with travel for education or to take children to school remaining at a low level

Essential journeys

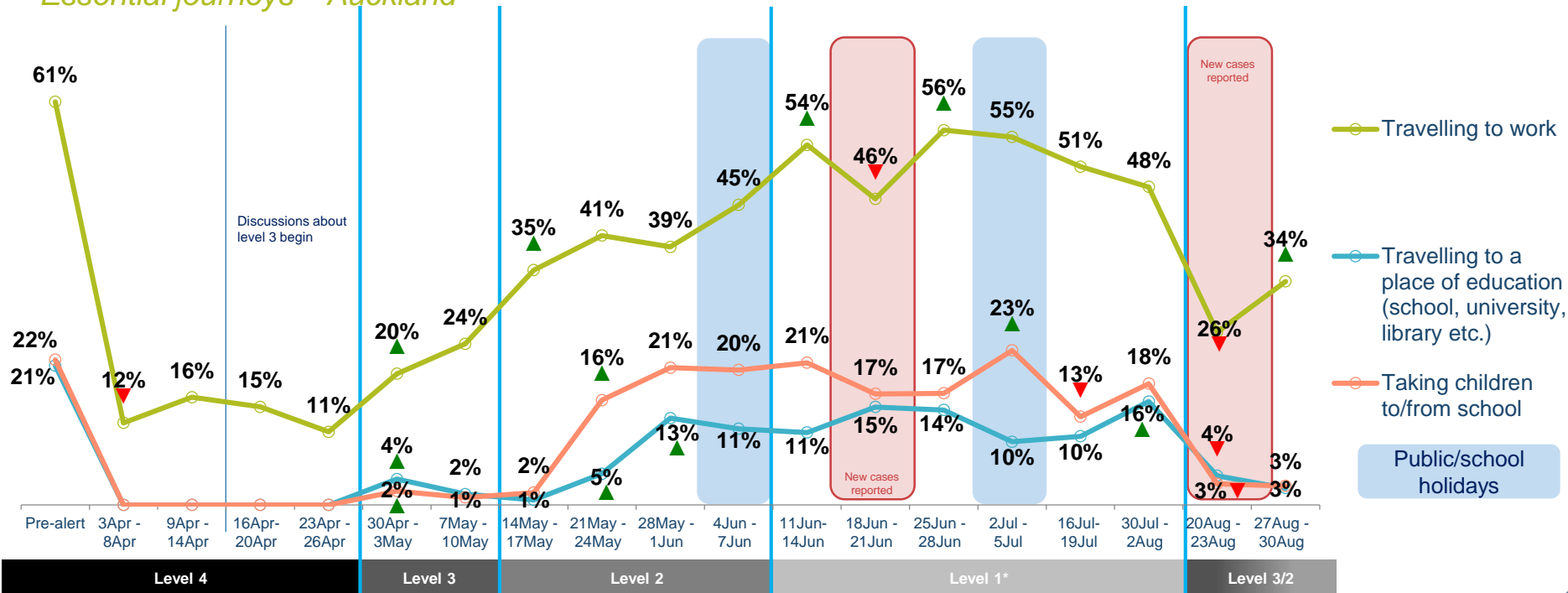


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (e.g. in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 17 (n= between 1,230 – 1,300)



The increase in national commuting journeys is chiefly driven by a statistically significant jump in the proportion of Aucklanders reporting at least one work journey

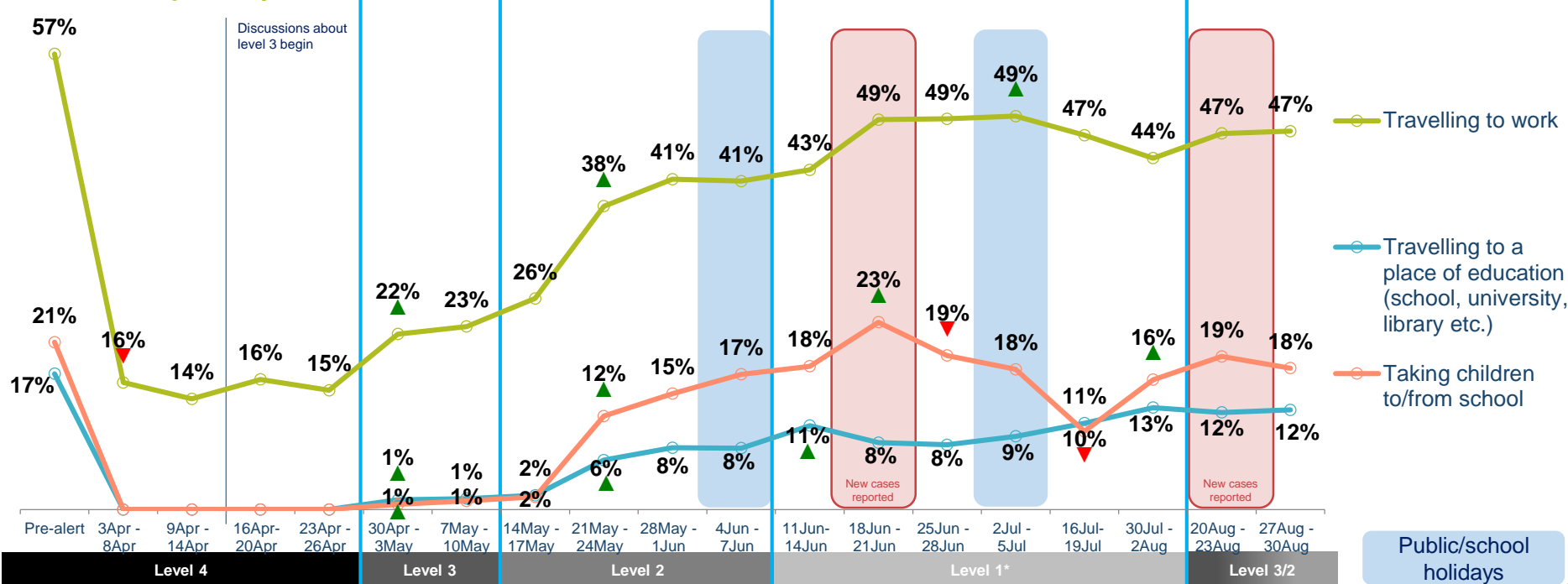
Essential journeys – Auckland



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 – 17 (n= between 1,230 – 1,300)

Comparatively, the proportion undertaking each of the daily essential journeys tested remained stable across the rest of New Zealand during the most recent wave

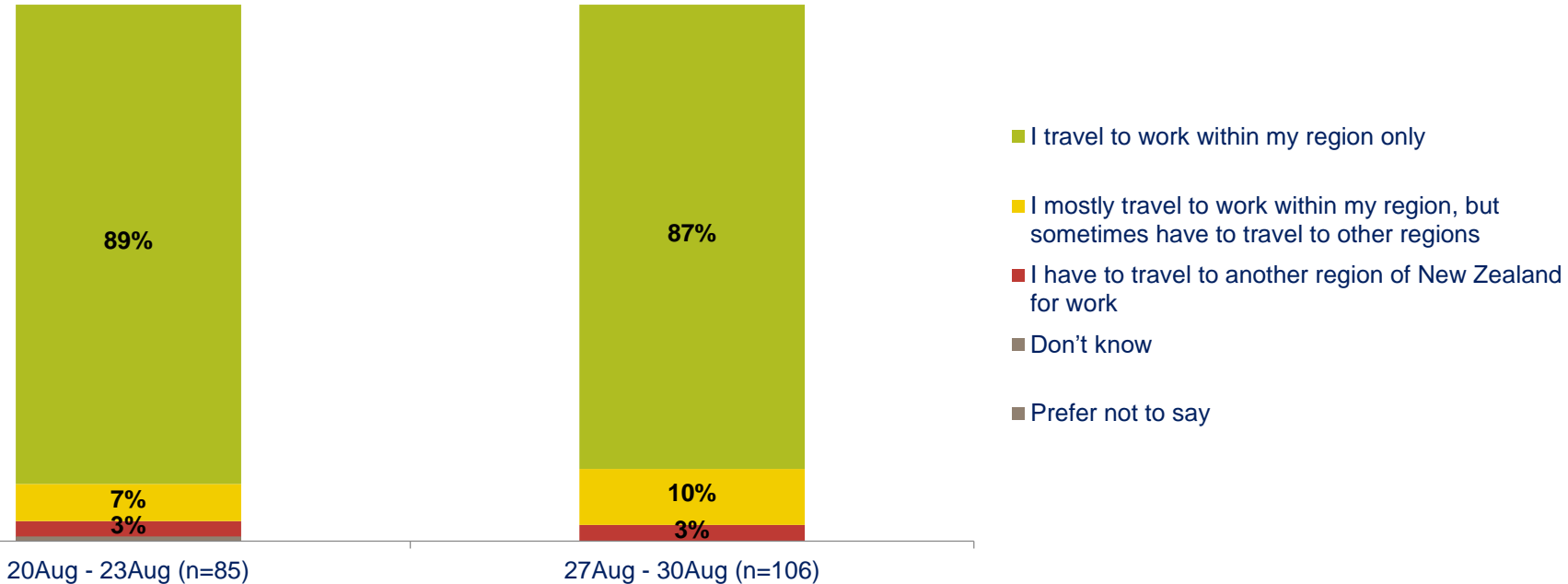
Essential journeys – rest of New Zealand



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 – 17 (n= between 1,230 – 1,300)

While the number of work journeys *within* Auckland has increased, there has been no significant change in the proportion travelling *out* of the region for work

Travel in and out of the Auckland region



QWORK3B And which of the following applies to your work travel?/
Base: all adults 15+ All currently travelling for work in Auckland



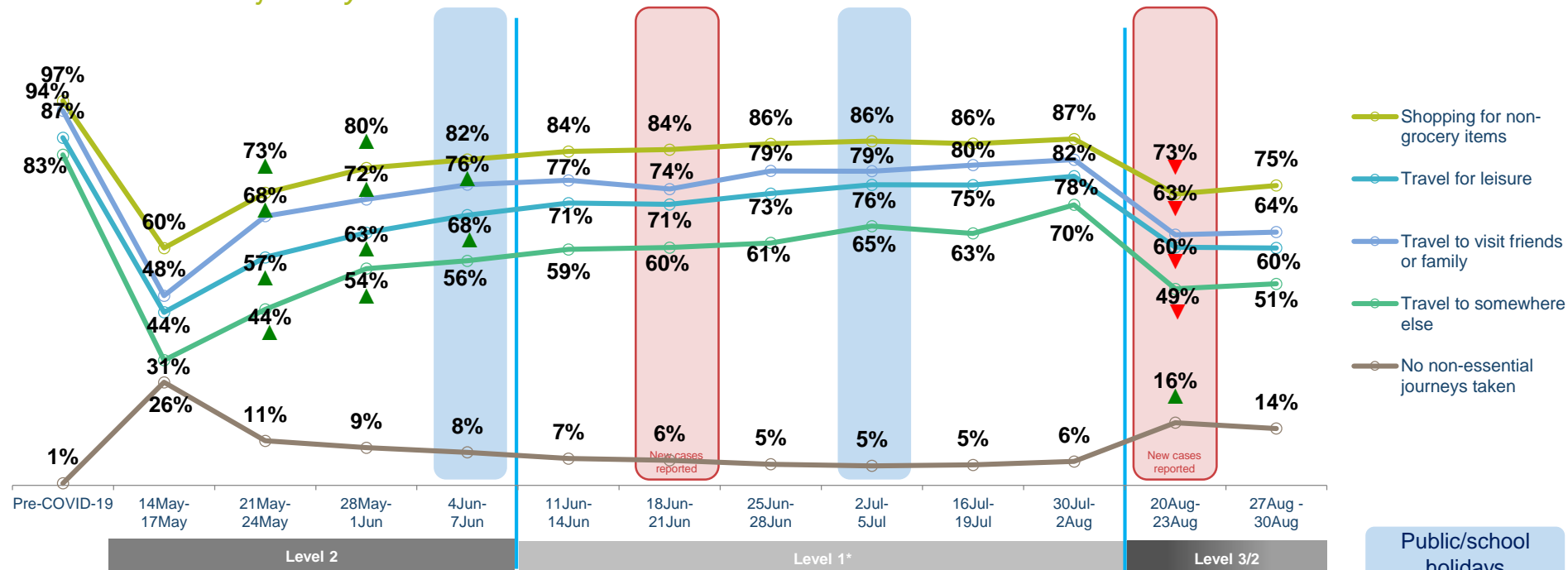
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

After a drop following the announcement of a second lockdown, the proportion making each type of non-essential journey has remained low nationally

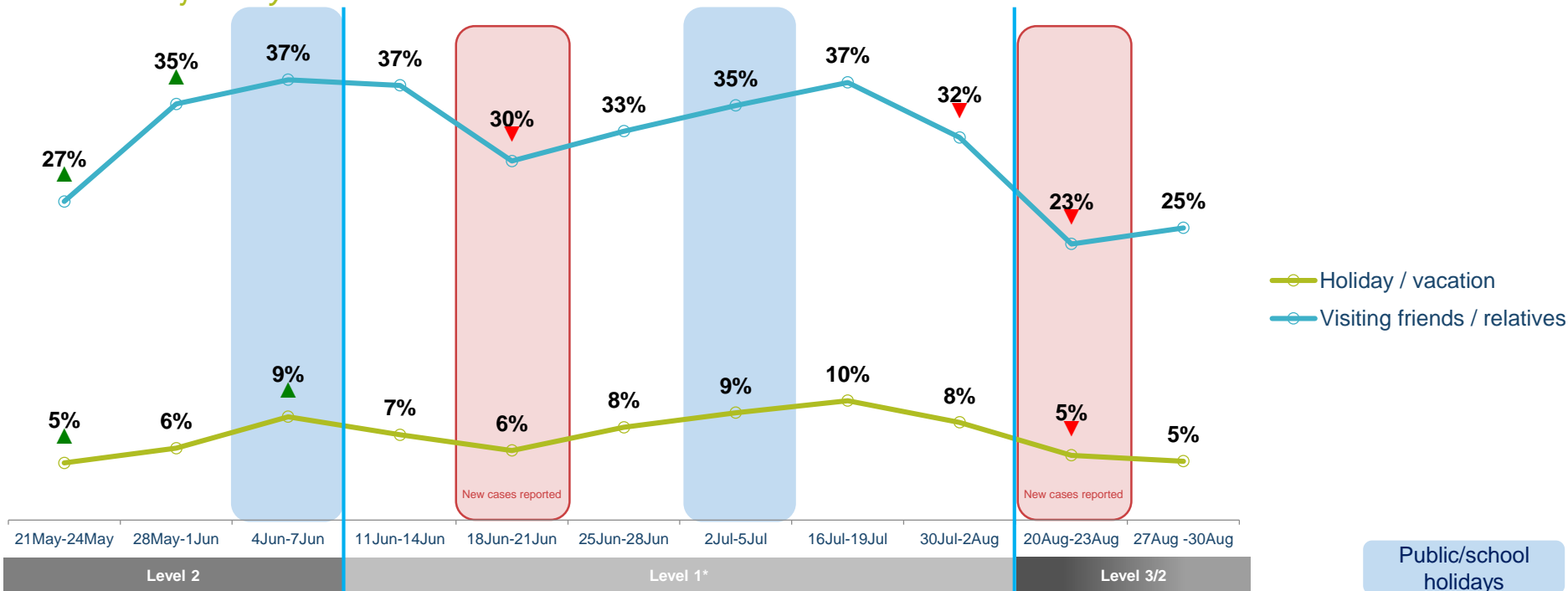
Non-essential journeys



QMODE1A/2A. How would you normally make each of the following types of journeys? And thinking about other types of journeys you might have made in the past seven days. How, if at all did you make each of the journeys listed below in the past seven days?
 Base: all adults 15+ interviewed during level 2 and level 1 in New Zealand

Inter-regional leisure journeys have also yet to begin any sort of recovery after falling at the start of the split-level lockdown

Domestic journeys

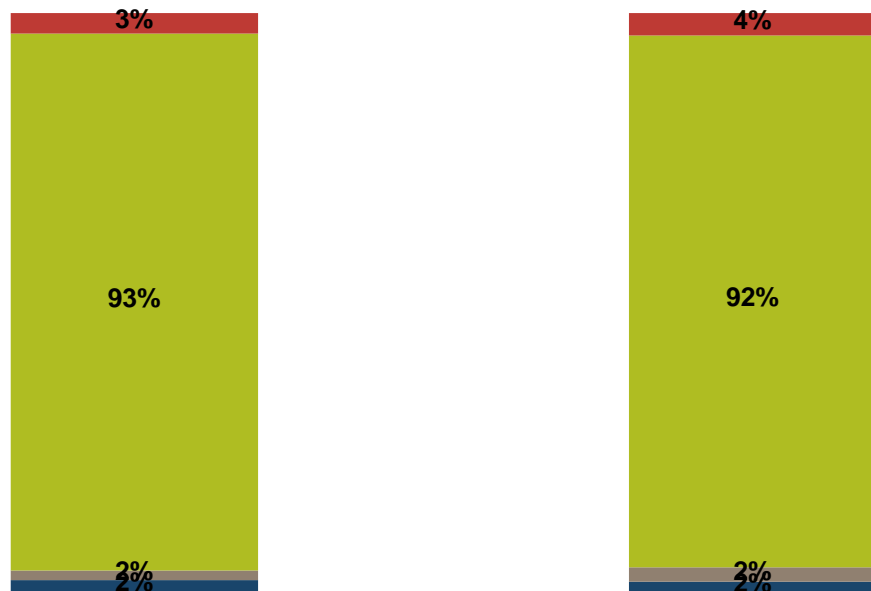


QJOURNEY4. In the next few questions, we will ask you about journeys that you might make domestically. By that we mean journeys you might make outside of the region you live in to another part of New Zealand. Which, if any of the following types of journeys did you make during the last seven days?



A similarly small proportion reported travelling in and out of Auckland during the second week of the split lockdown, equivalent to almost 200,000 people

Travel in and out of the Auckland region



- I have had to travel in and out of the Auckland region within the last week
- I have not had to travel in or out of the Auckland region within the last week
- Don't know
- Prefer not to say

20Aug - 23Aug (n=1254)

27Aug - 30Aug (n=1201)

QWORK3C Which, if any of the following applies to you

Base: all adults 15+ in New Zealand / All currently travelling for work in Auckland



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

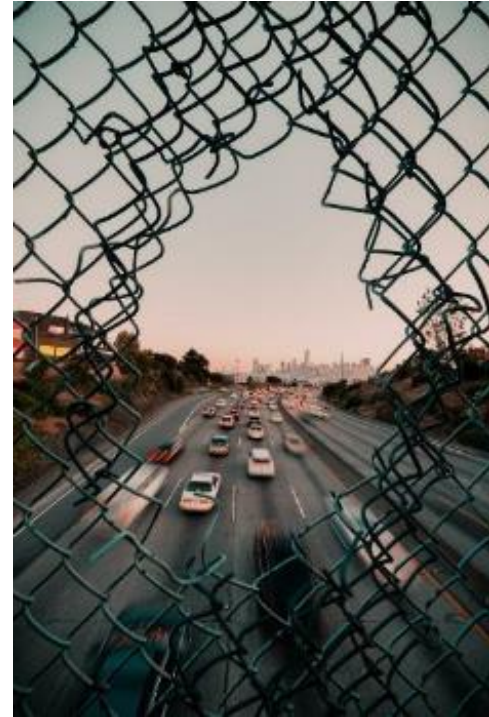


Section 5 – Modal changes

Key findings – modal changes

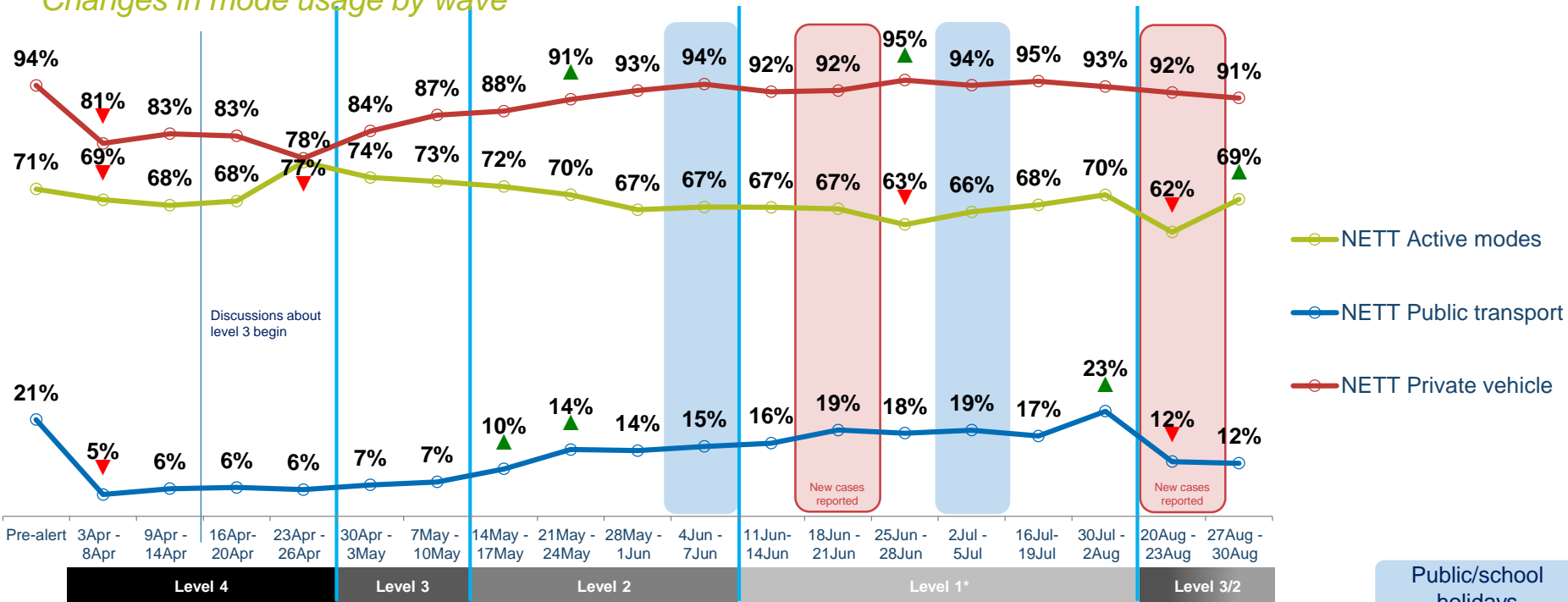
Waka Kotahi objective – how and why is travel changing?

- 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.
- In the second week under the new lockdown restrictions, usage of many modes has remained at a suppressed level across the country, with some variation between respondents inside and outside of Auckland.
- There has been a recovery in reported active mode travel, driven chiefly by more people walking at least once a week in all regions of New Zealand.
- Nationally, public transport *usage* has yet to recover after falling at the start of the new lockdown. There have been small directional increases in the reported usage of buses and taxis in Auckland, with ferries and trains continuing to decrease in the city.
- There has been no recovery in public transport usage across the reset of New Zealand as a whole.
- Auckland has also seen a directional recovery in consideration, this has historically been a lead indicator of recovery or growth in public transport usage. Outside of Auckland though, this metric has not improved for public transport, further decreasing during the second week of the split lockdown.
- While transmission concerns continue to be salient as a barrier to public transport usage, there has been a significant increase this wave in the proportion saying their reduced public transport travel is due to a reduction of need.
- However, the majority of these people say that an end of, or reduction in, alert levels will lead them to return to public transport.



Nationally there was a recovery in reported active mode travel during the most recent wave, while public transport held steady at a somewhat suppressed level

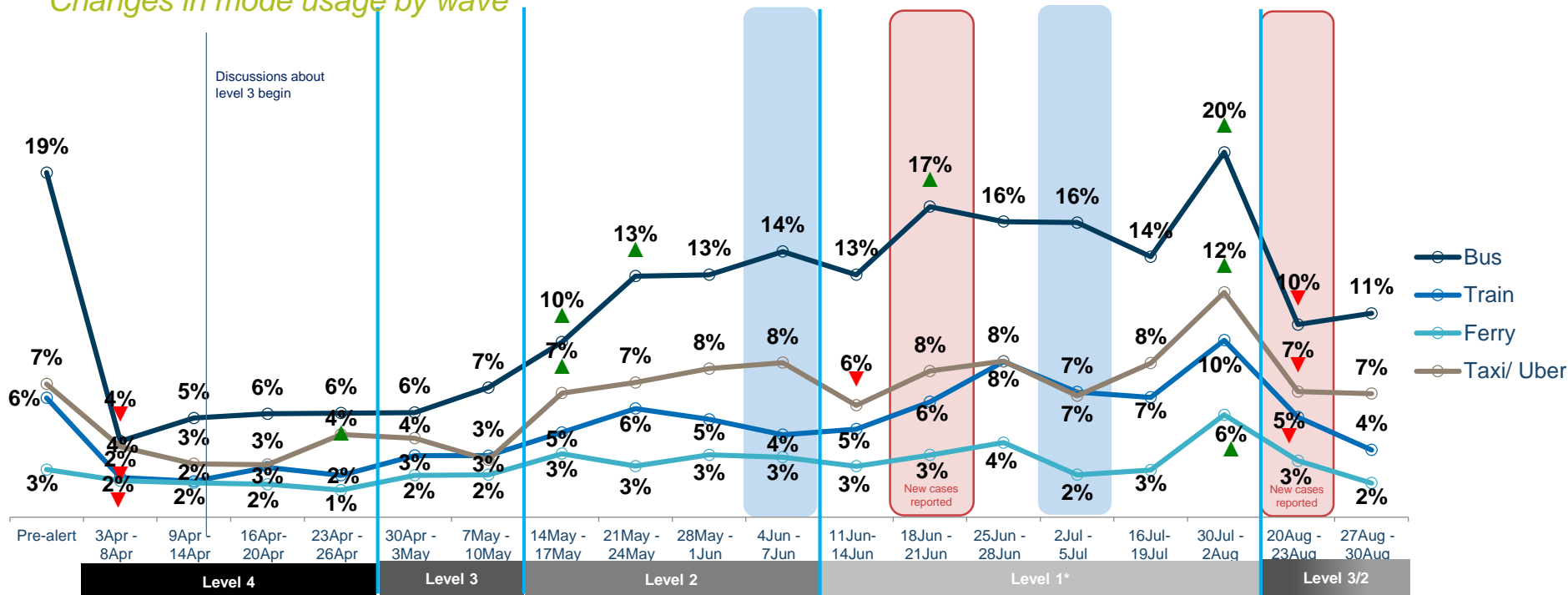
Changes in mode usage by wave



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

Nationally, reported weekly use of public transport remained at, or near, levels reported during the first week of the new lockdown

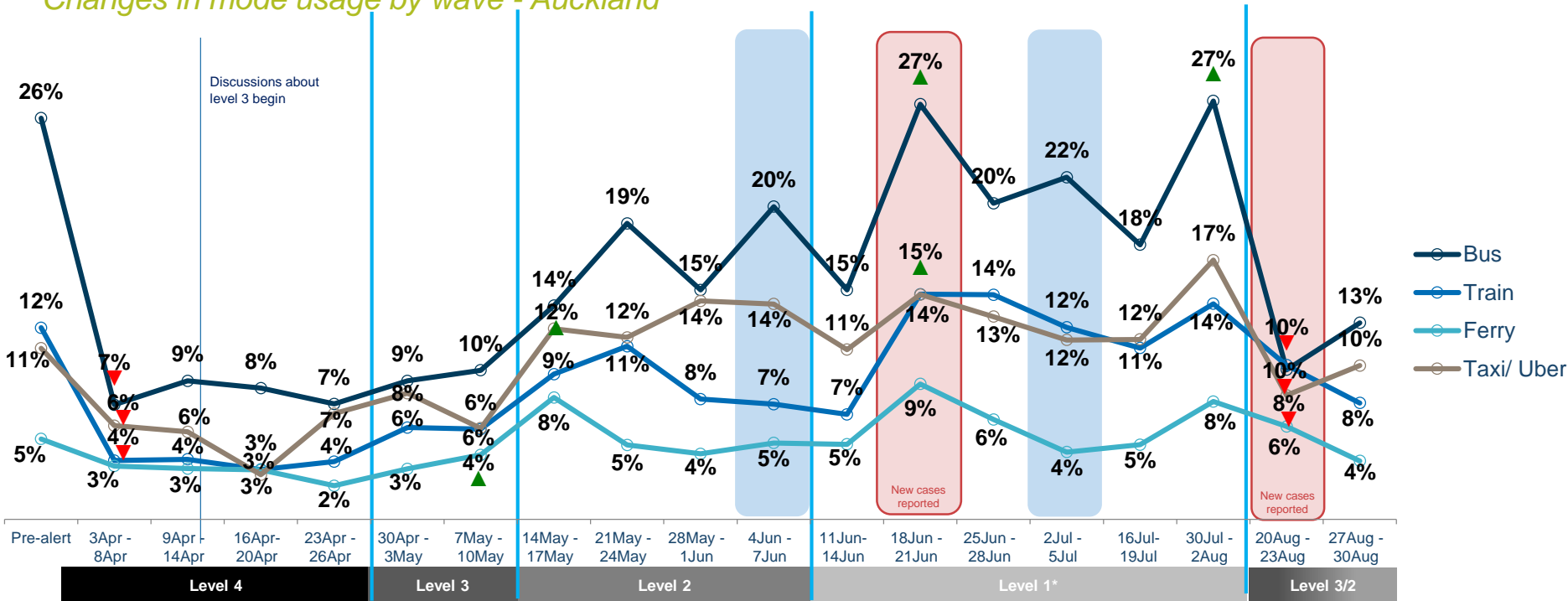
Changes in mode usage by wave



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

Although not statistically significant, there are some signs of directional recovery in weekly bus and taxi usage within Auckland

Changes in mode usage by wave - Auckland



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



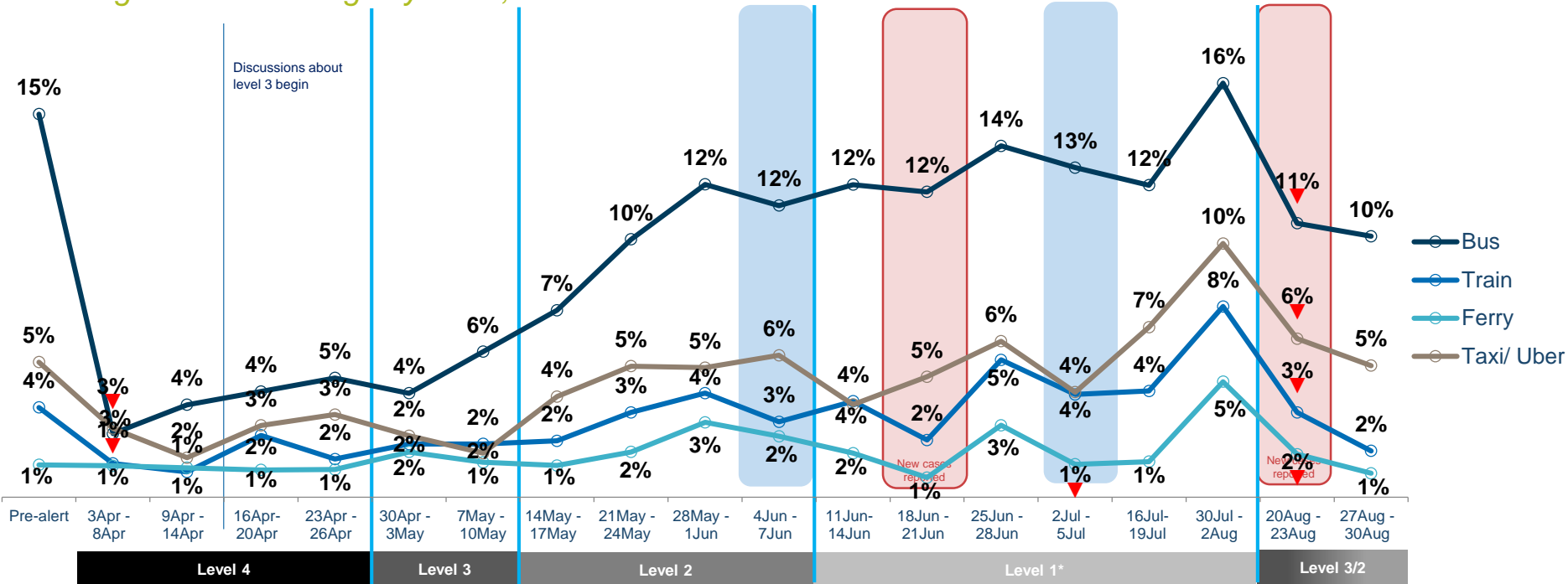
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Outside of Auckland, reported weekly usage of all public transport modes remained mostly stable and has yet to recover to usage rates seen in level 1

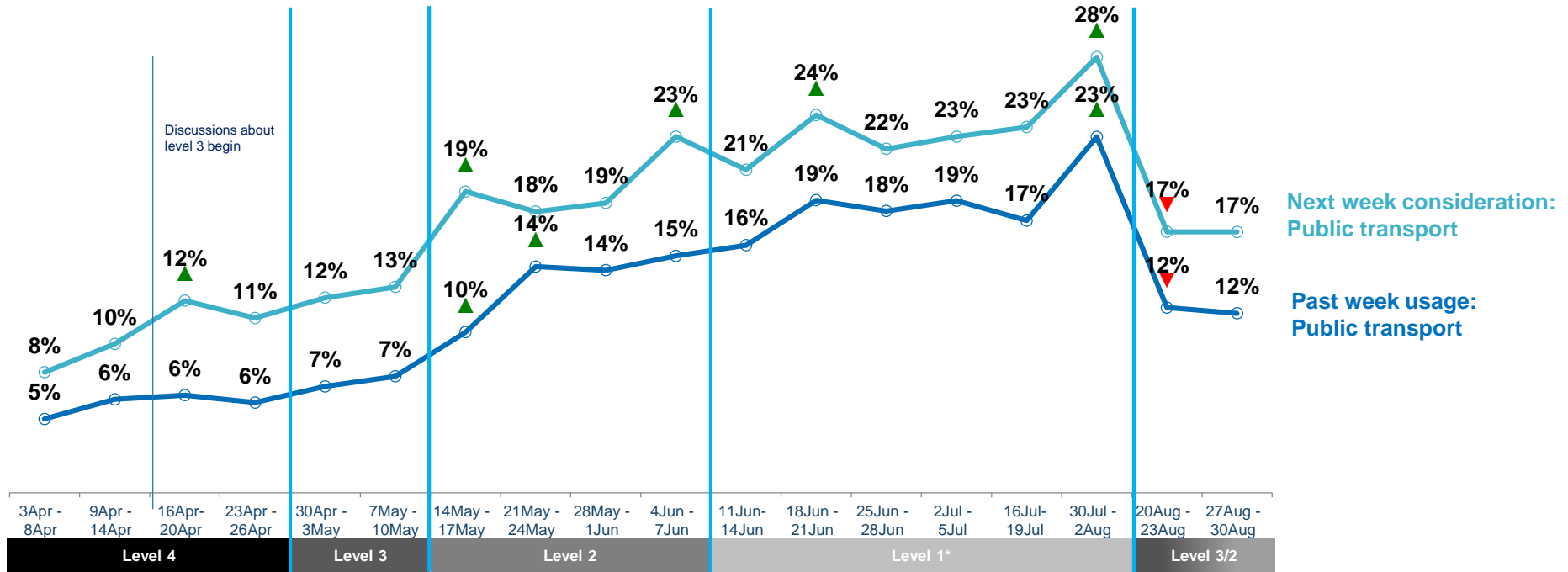
Changes in mode usage by wave, non-Auckland



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

Nationally, consideration of public transport modes has not recovered during this second week under a split-level lockdown

Current mode usage vs mode consideration (public transport)



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



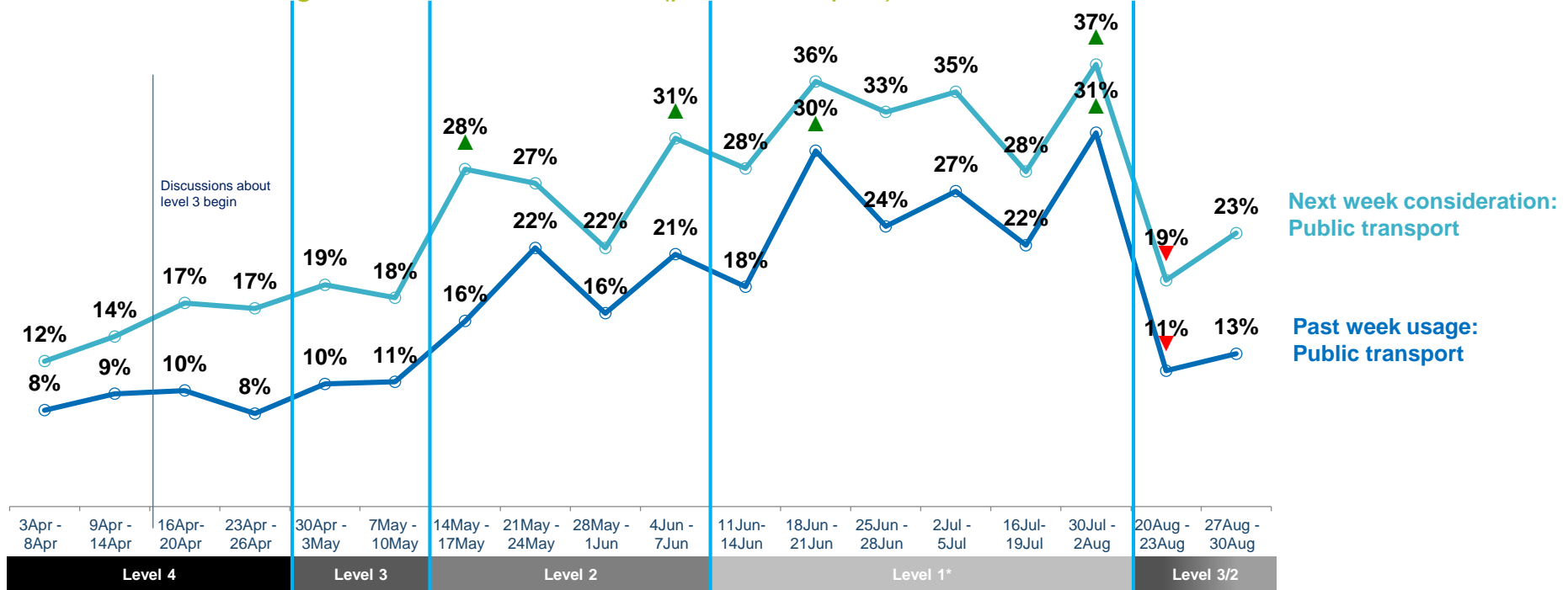
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

In Auckland, there has been a small directional increase in consideration that could be indicative of positive movement when restrictions are relaxed

Current mode usage vs mode consideration (public transport) - Auckland



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



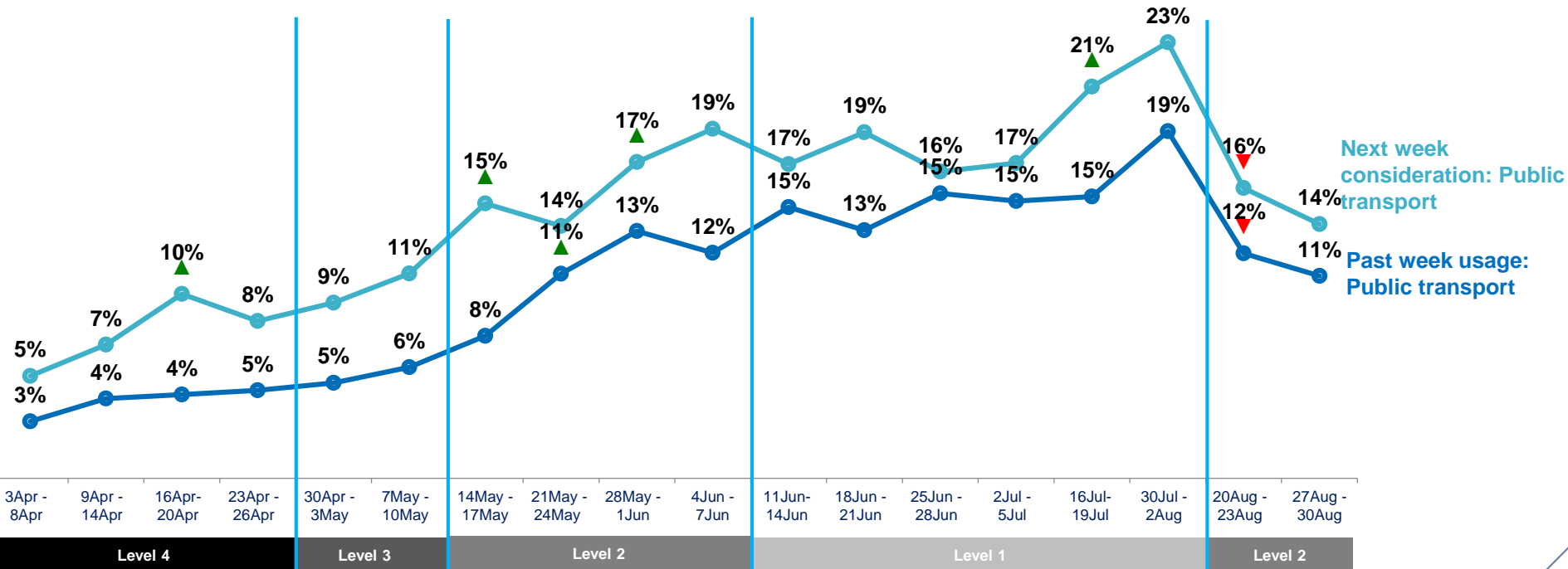
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Outside of Auckland, public transport consideration has yet to turn around, which may indicate a slower return of passengers

Current mode usage vs mode consideration (public transport) – rest of New Zealand



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



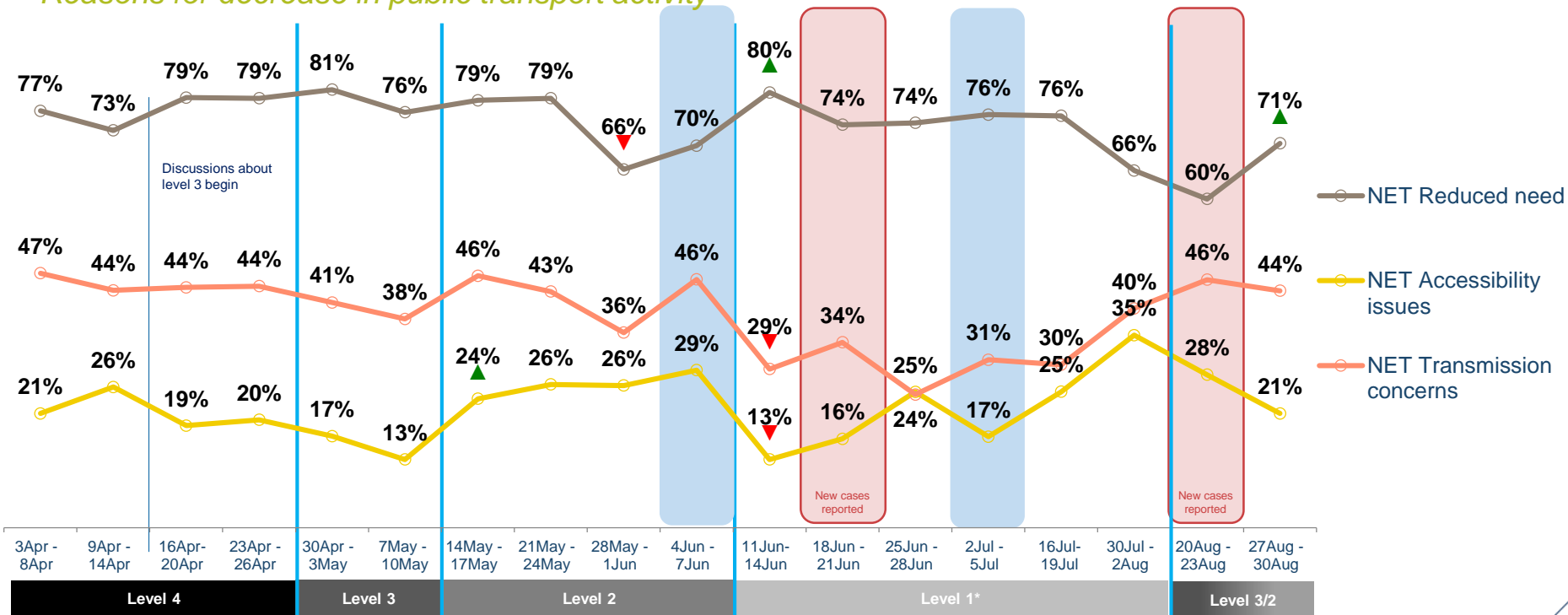
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Reduced need has increased as a barrier to public transport usage, with transmission concerns remaining at the higher level reported in the previous week

Reasons for decrease in public transport activity



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

Base: decreasing PT usage in past week



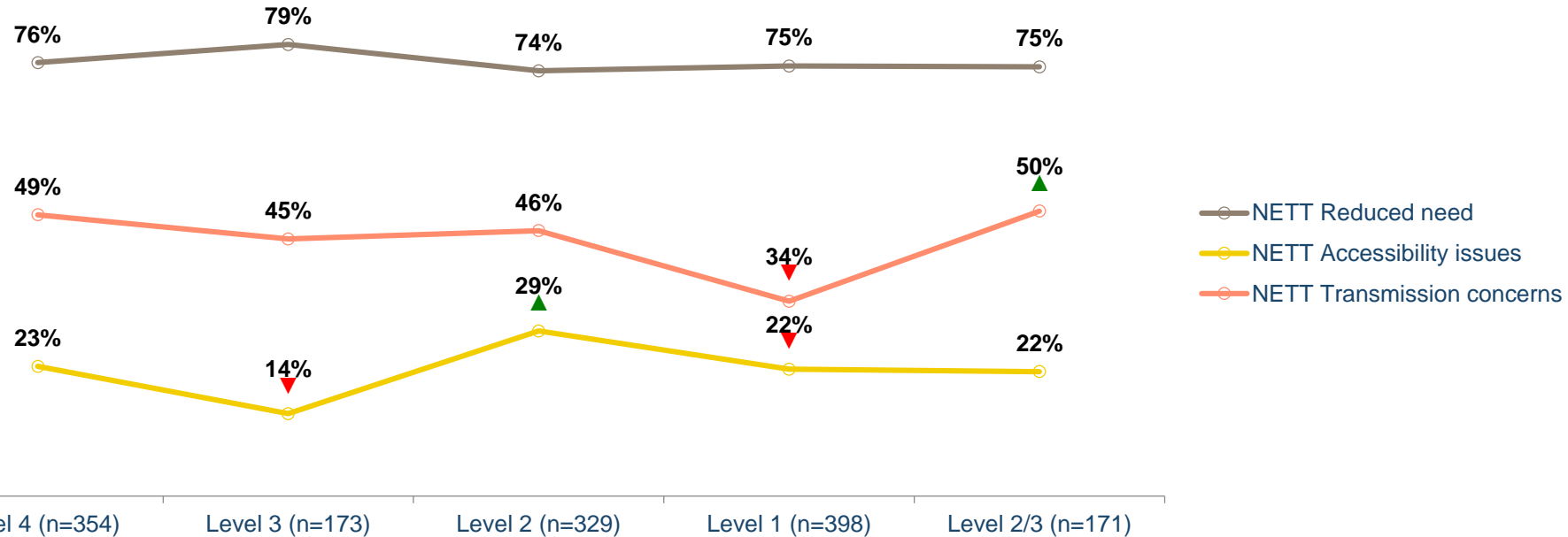
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

Within Auckland, transmission concerns have been higher across the new split level, but Aucklanders have consistently cited lower need throughout this research

Reasons for decrease in public transport activity - Auckland

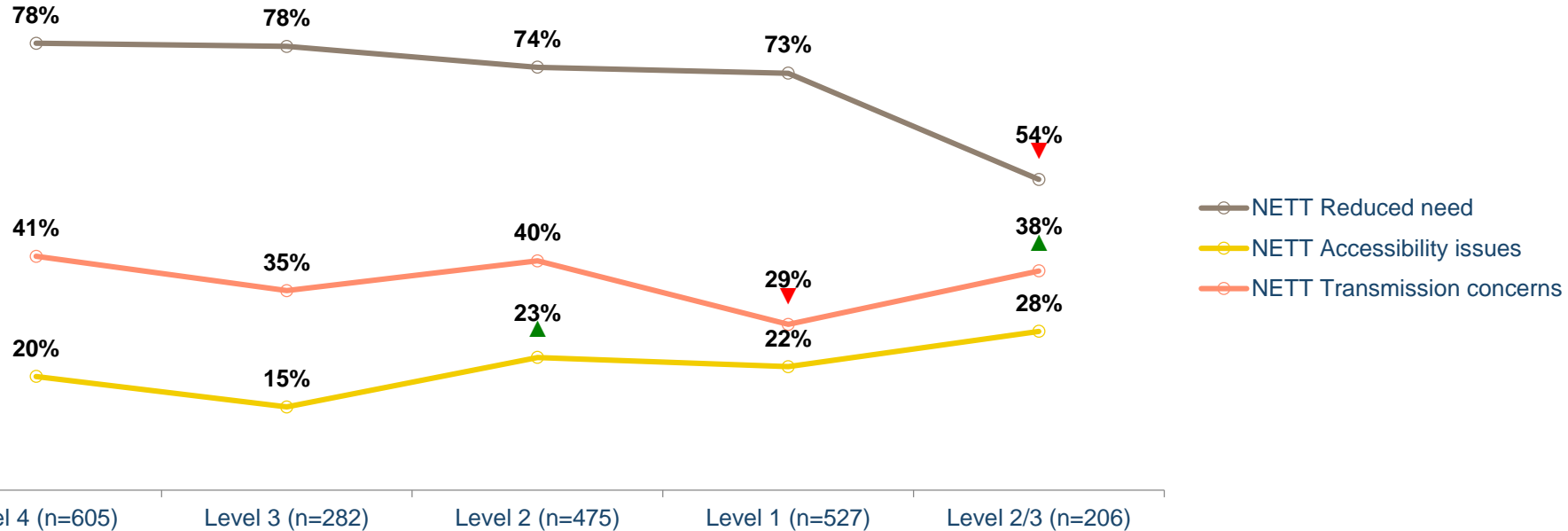


For which, if any of the following reasons, has your use of public transport decreased?
Base: decreasing PT usage in past week



Outside of Auckland, reduced need has been cited as a barrier much less during the new lockdown, with more businesses open and fewer people working from home

Reasons for decrease in public transport activity – non-Auckland

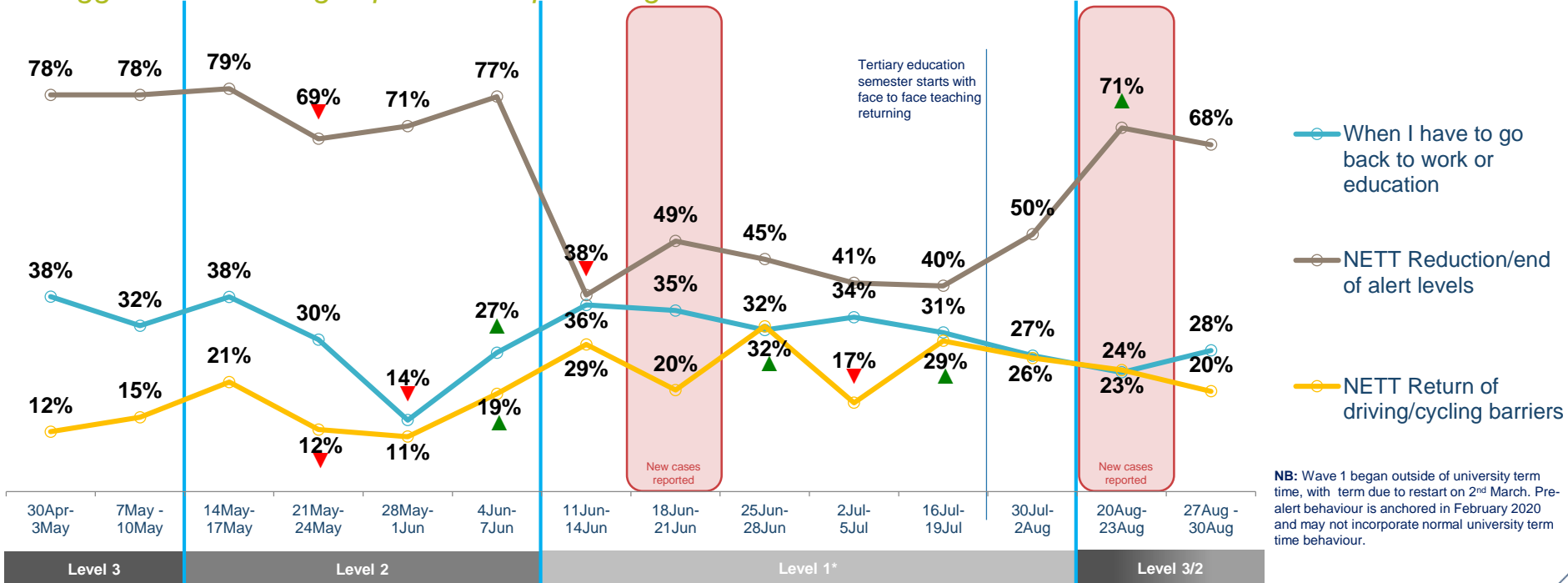


For which, if any of the following reasons, has your use of public transport decreased?
Base: decreasing PT usage in past week



Nationally, the majority cite an end of, or stepping down of, alert levels as the main trigger for their return to public transport

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



Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

A photograph showing a person walking on the left and two cyclists on the right, all on a paved path. The scene is outdoors with trees in the background. A diagonal blue overlay covers the top-left portion of the image. The text 'Section 6 – Perceptions of transport modes' is overlaid in white on the blue area.

Section 6 – Perceptions of transport modes

Key findings – Perceptions of transport modes

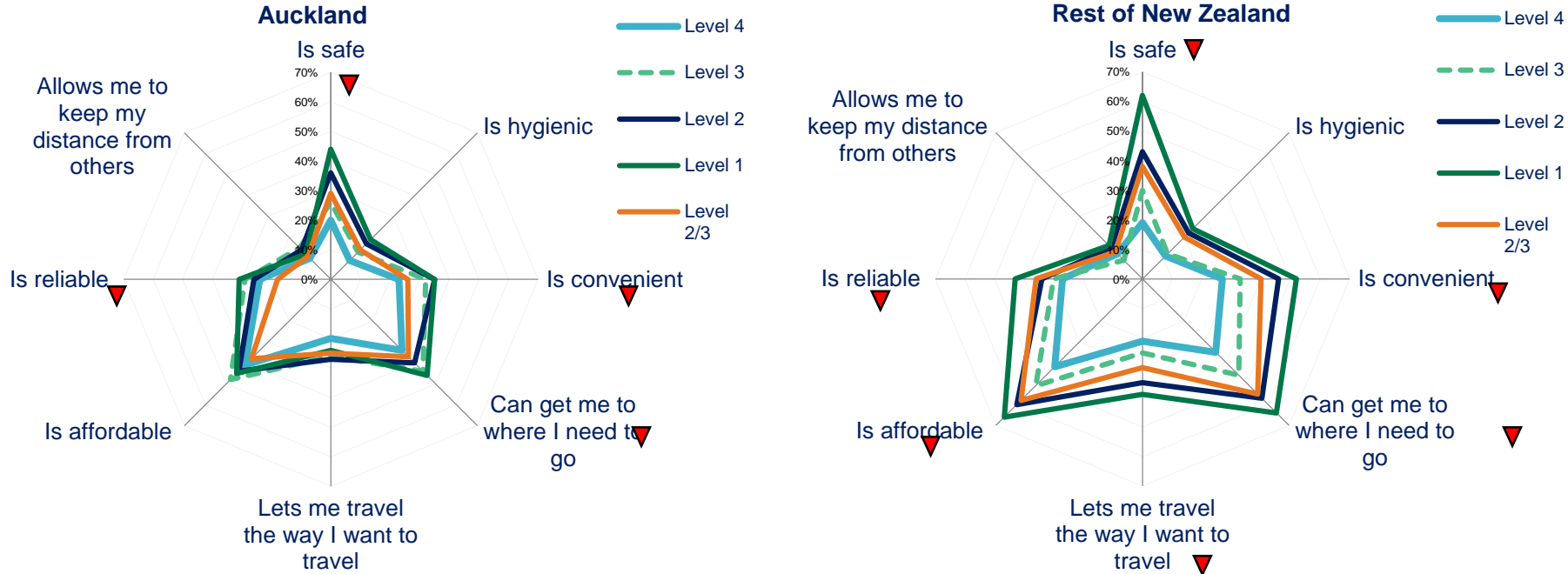
Waka Kotahi objective – how might people’s perception of transport modes impact travel choices

- 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.
- Forms of mass transit like buses and trains have been most impacted in terms of passenger perceptions, both in Auckland and in other regions.
- Trains have been the most impacted overall, but there have been more pronounced local changes in Auckland where perceived reliability, safety and hygiene have fallen massively.
- Buses have been somewhat less impacted, but outside of Auckland where they are the most common public transport form, their image is currently closer to where it was during the original level 2 lockdown.
- Taxis and ubers seem to have a somewhat more resilient image, with no statistically significant shifts in Auckland or the rest of New Zealand. There has been a directional decrease in their perceived safety, hygiene and convenience within Auckland during this time though.
- Walking, which has driven an increase in active mode travel this wave, is still positively perceived on most attributes and largely unaffected by the new lockdown.



The new lockdown has seen negative movement in perceptions of the bus inside and outside of Auckland, but buses have generally had a weaker image in Auckland

Perceptions of the bus

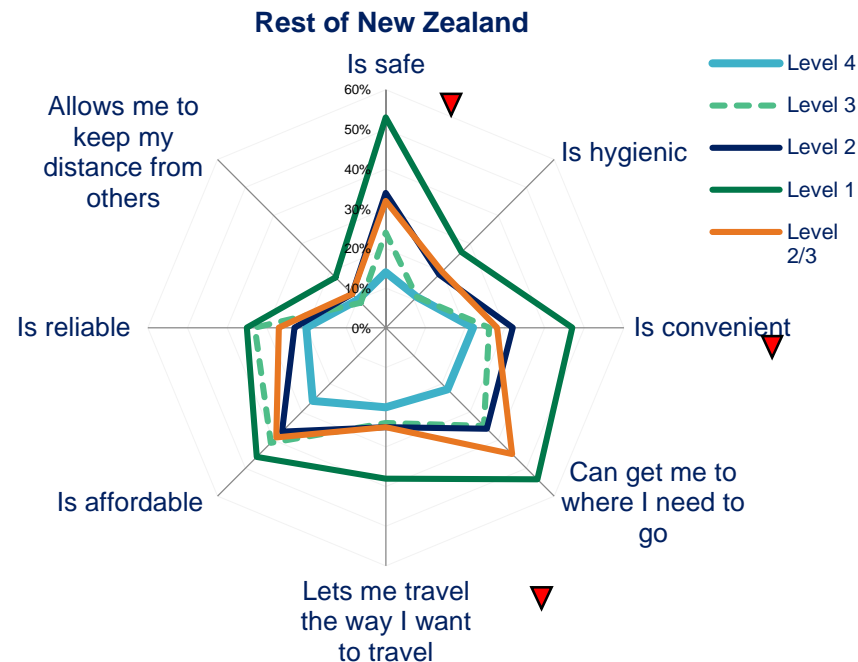
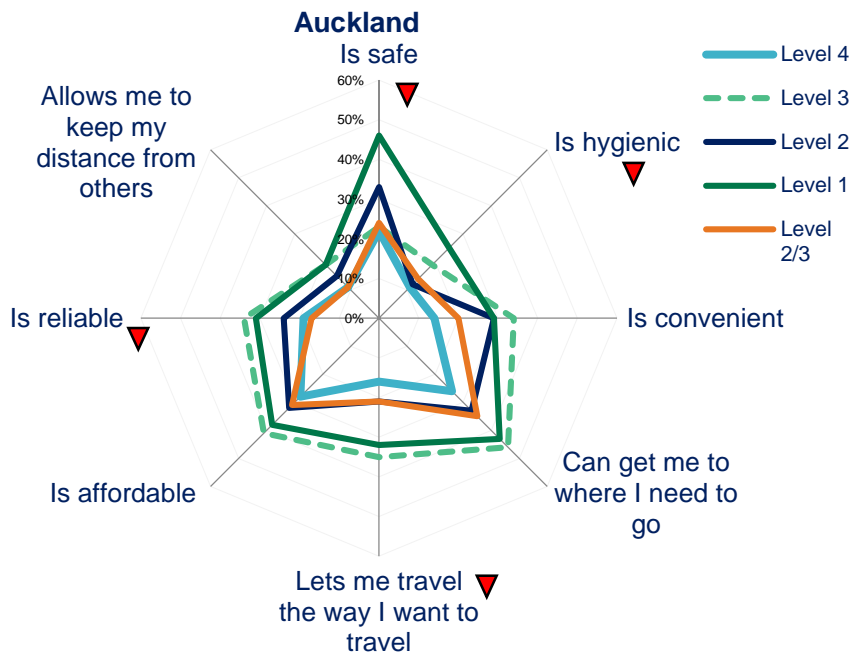


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: Aucklanders who travel by Bus normally: level 4 (n=346), level 3 (n=174); level 2 (n=388); level 1 (n=564); level 2/3 (n=191)
 Base: New Zealanders who travel by Bus normally: level 4 (n=597), level 3 (n=278); level 2 (n=591); level 1 (n=925); level 2/3 (n=307)

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

Trains have also seen a significant drop in perceptions across the country, but Auckland has seen the most significant fall in reliability and hygiene perceptions

Perceptions of the train

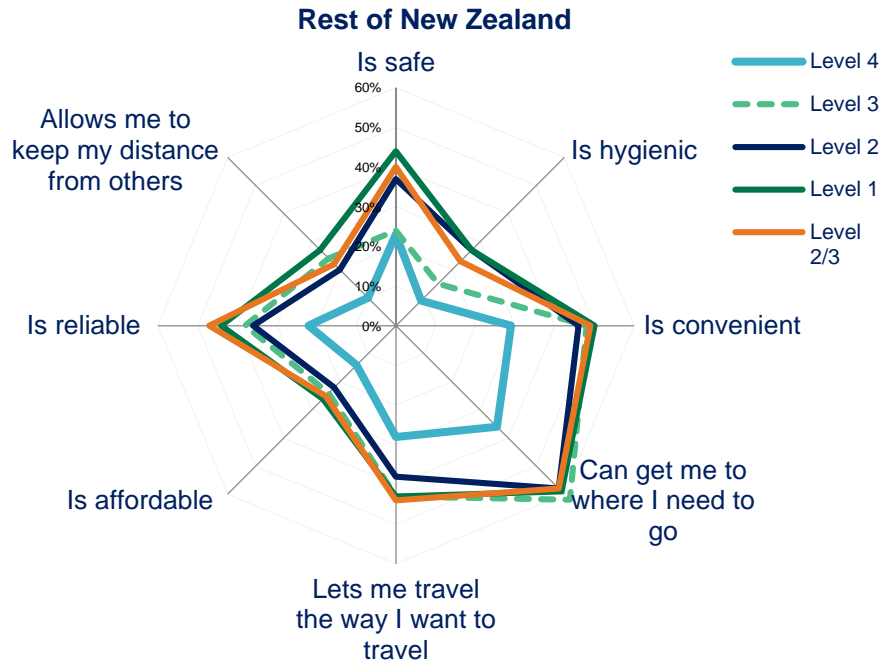
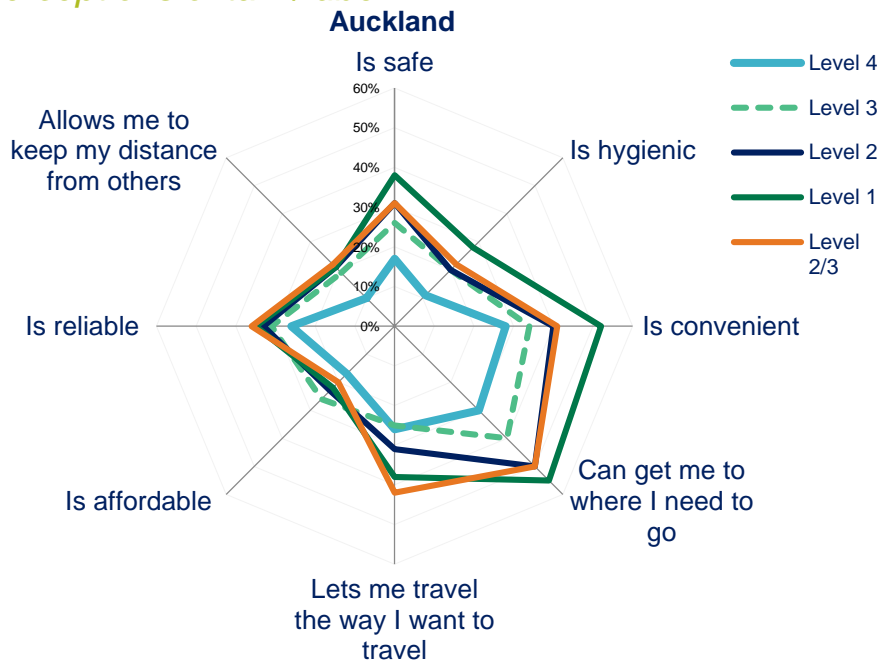


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: Aucklanders who travel by train normally: level 4 (n=176), level 3 (n=78); level 2 (n=215); level 1 (n=277); level 2/3 (n=105);
 New Zealanders who travel by train normally: level 4 (n=147), level 3 (n=82); level 2 (n=190); level 1 (n=313); level 2/3 (n=78);

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

Comparatively, private hire vehicles have been less impacted by the new lockdown and have generally maintained their image outside of Auckland

Perceptions of taxi / uber

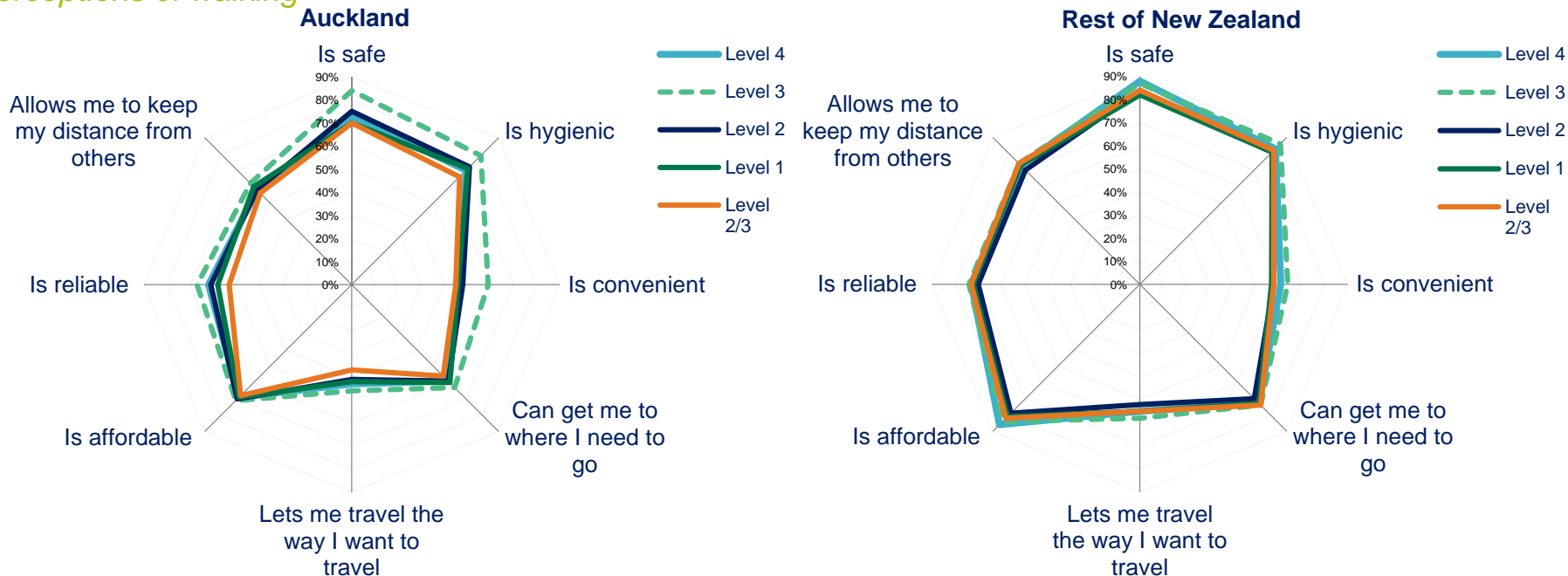


QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: Aucklanders who normally travel by Uber / Taxi: level 4 (n=157), level 3 (n=80); level 2 (n=221); level 1 (n=268); level 2/3 (n=98)
 New Zealanders who normally travel by Uber / Taxi: level 4 (n=198), level 3 (n=84); level 2 (n=250); level 1 (n=407); level 2/3 (n=132)

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

While there has been a general drop in perceptions of walking as a transport mode in Auckland, this movement is not sufficient to be statistically significant

Perceptions of walking



OPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
 Base: Aucklanders who normally use walking as a means of travel: level 4 (n=456), level 3 (n=216); level 2 (n=496); level 1 (n=711); level 2/3 (n=234); New Zealanders who normally use walking as a means of travel: level 4 (n=989), level 3 (n=520); level 2 (n=1,083); level 1 (n=1,576); level 2/3 (n=495)

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



Section 7 – Going forward with domestic tourism

Key findings – Going forward with domestic tourism

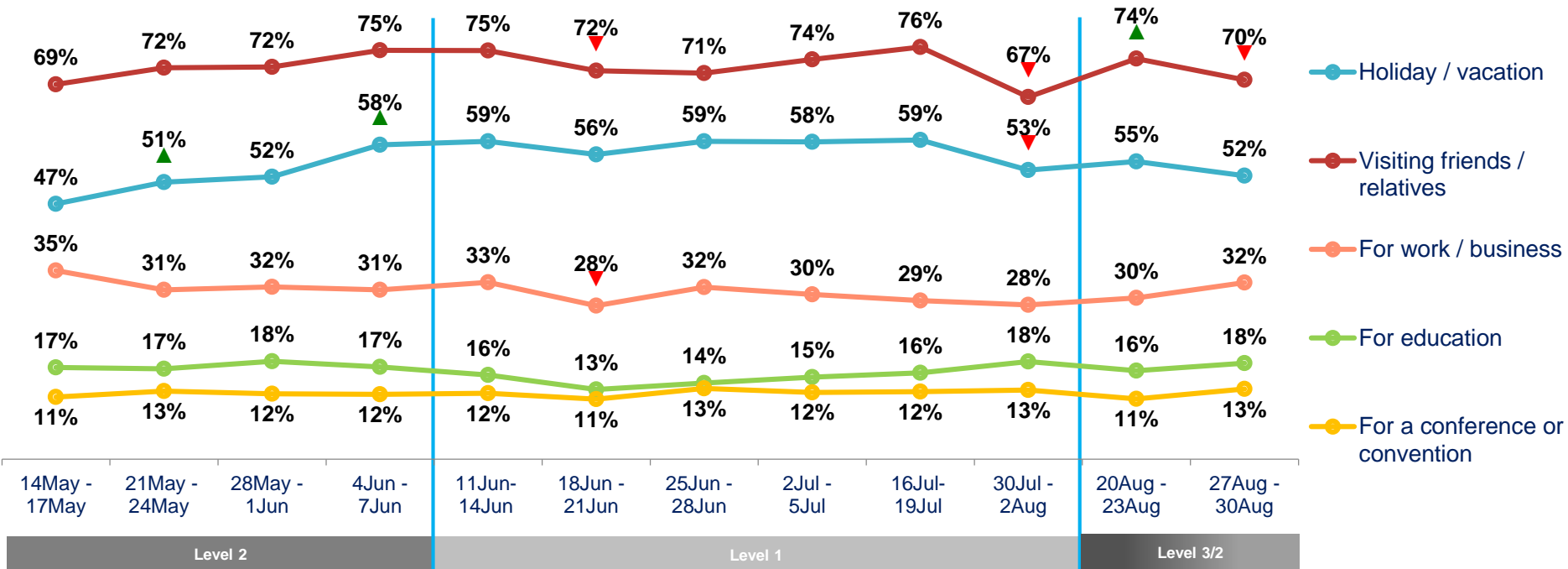
Waka Kotahi objective – how will domestic tourism change going forward?

- New Zealand has opened 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.
- In spite of a broadly negative trend in recent travel behaviour due to increased COVID-19 restrictions, medium to long term intention to travel has moved positively during the new lockdown period, with little change between the most recent waves.
- For those expecting to travel less, the role of COVID-19 transmission concerns has been mixed. Those in Auckland are no more likely to cite this risk as a barrier than they were last week, however non-Aucklanders are much more likely to be concerned about transmission or expect travel disruptions arising from COVID-19.



Nationally there has been a decrease in those likely to visit friends, but generally longer term tourism plans remain unaffected by the new lockdown

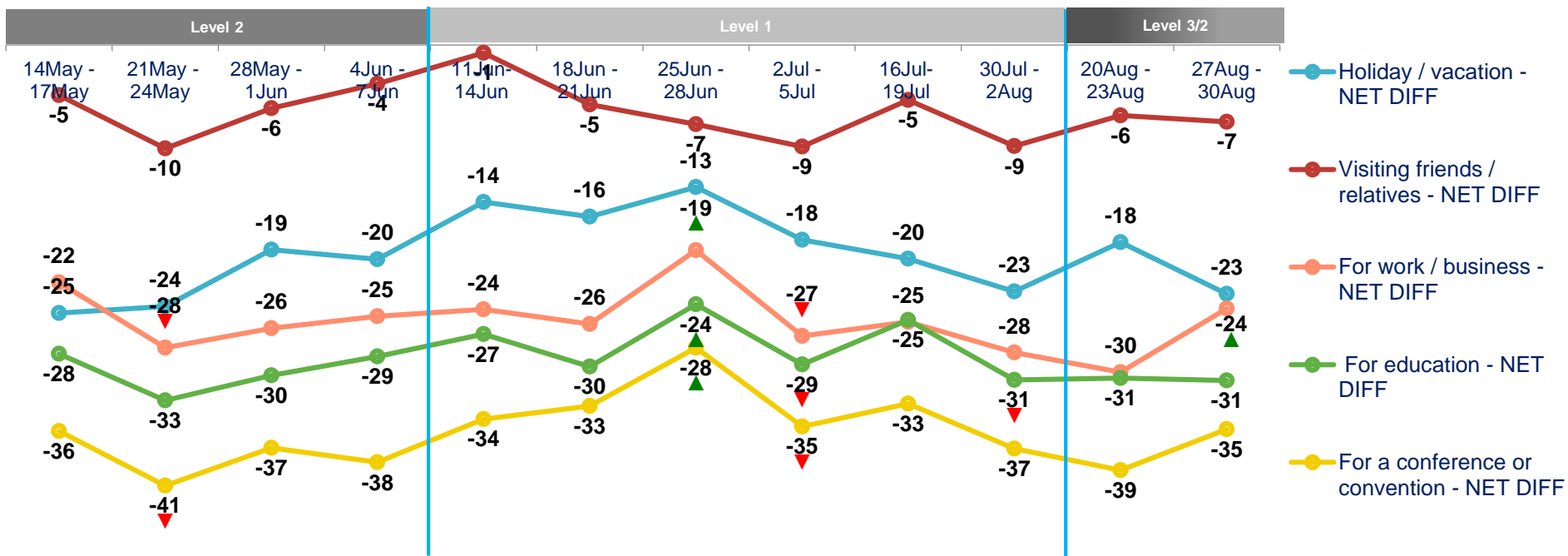
Proportion saying that they are likely to make domestic journeys in the next six months



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

There has been a mix of directional shifts in terms of the projected NET change in tourism journeys over the next six months

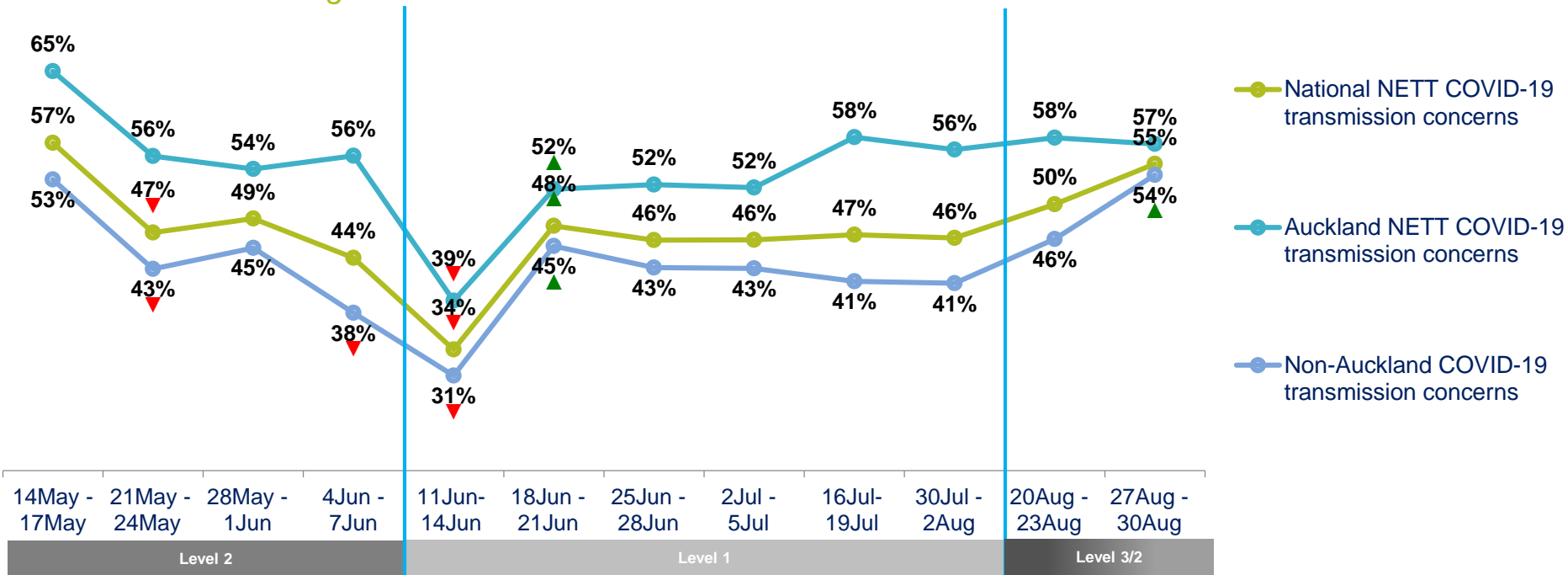
Intention to travel domestically



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

Transmission concerns have not increased as a long-term barrier to travel for Aucklanders, but they are significantly more prevalent for non-Aucklanders

Reasons for travelling less – transmission concerns

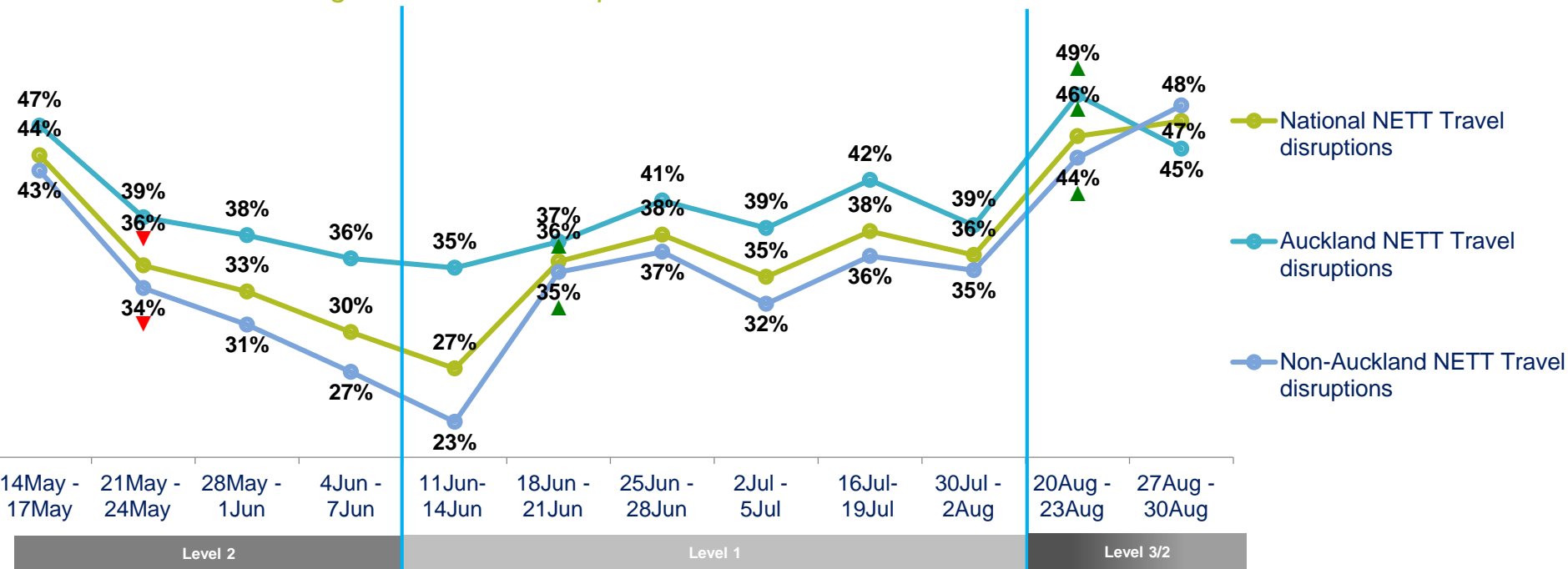


FDT3A. What are the main reasons that you intend to travel less?
 Base: all adults 15+ in New Zealand who intend to travel less



Similarly, concerns around travel disruptions have abated a little as a barrier for Aucklanders while continuing to increase for those outside of Auckland

Reasons for travelling less – travel disruptions



FDT3A. What are the main reasons that you intend to travel less?
 Base: all adults 15+ in New Zealand who intend to travel less





Section 8 – Working from home

Key findings – working from home

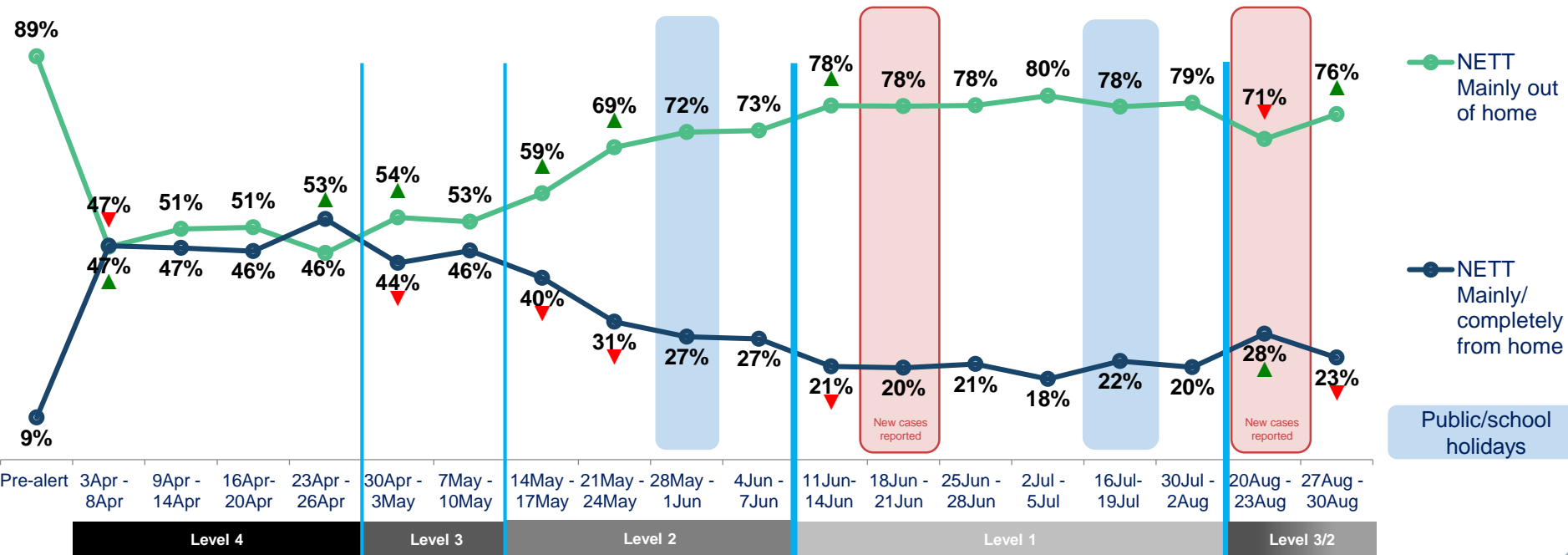
Waka Kotahi objective – understanding behaviour change

- Commuter traffic makes up a large proportion of the impact on transport infrastructure. As alert levels decrease and restrictions are relaxed, it's important to understand who will return to work travel and how, and who will continue to be absent from the commuter population.
- The proportion working from home in Auckland under the second week of the new lockdown has decreased rapidly, with the proportion claiming to work from home now closer to where it was in level one. Outside of Auckland, there has been no significant shift this wave.
- In terms of impact, this week public transport appears to be somewhat more impacted than usual, but in general the majority of commuters lost are still private vehicle users.
- This is reflected in the fact that CBDs are also more impacted by the decrease in commuters than any other type of area, which may be a feature of the more severe lockdown in Auckland.



Working from home decreased significantly following a spike at the start of the new lockdown

Proportion working in and out of home by survey wave



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

Base: all adults 15+ in New Zealand usually working



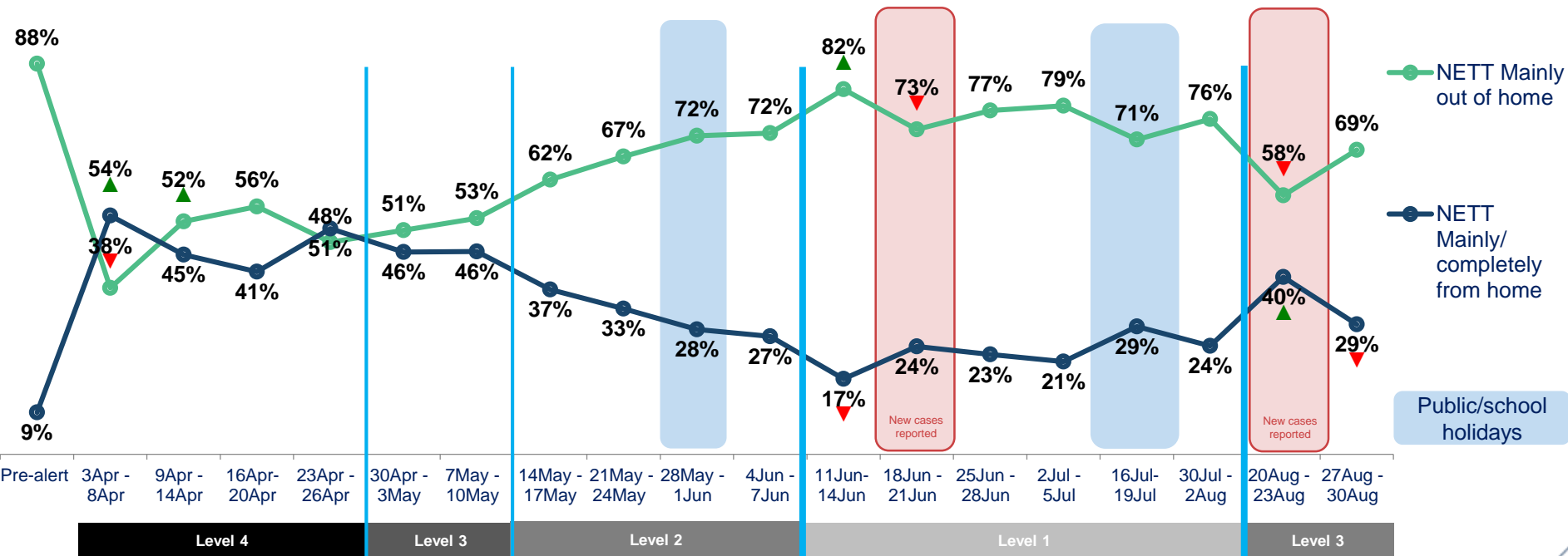
Indicates a statistically significant increase from previous wave



Indicates a statistically significant decrease from previous wave

The biggest decrease was in Auckland, where the proportion travelling to work recovered by 11 points

Proportion working in and out of home by survey wave: Auckland region

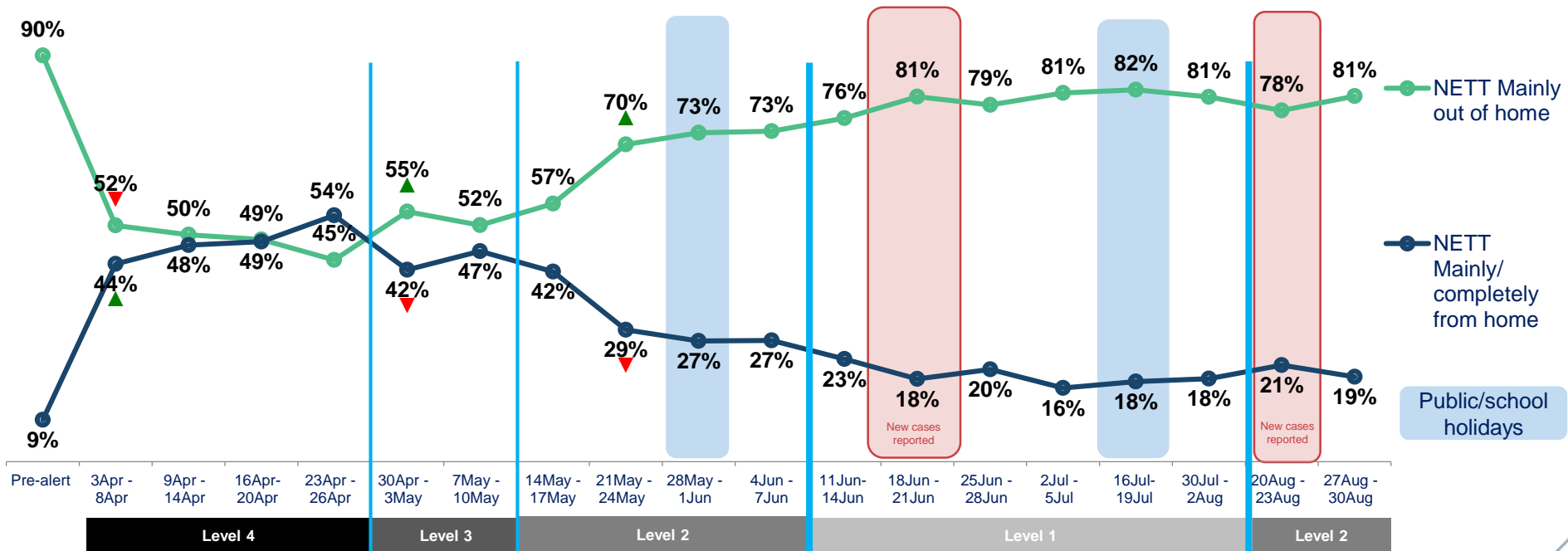


QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you *currently* work?

Base: all adults 15+ in New Zealand usually working

Outside of Auckland, there has not been a pronounced change in where people are currently working

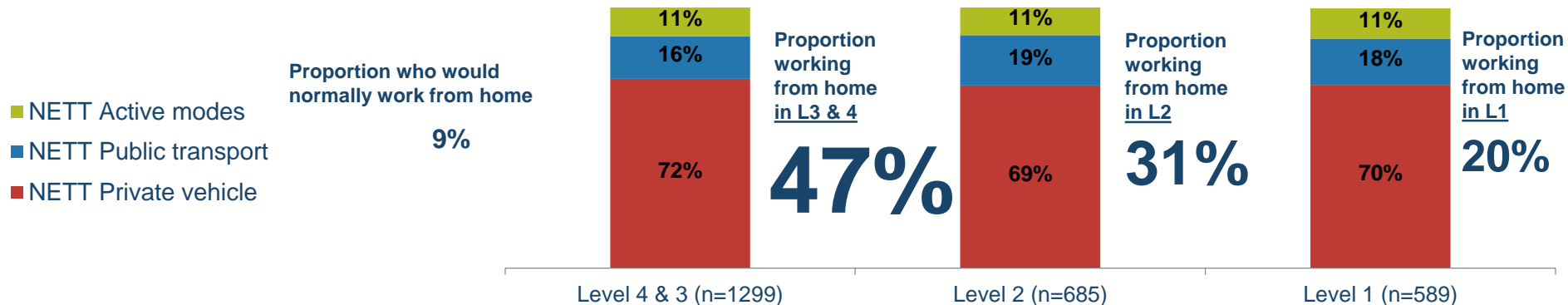
Proportion working in and out of home by survey wave: rest of New Zealand



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

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

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



Proportion of each commuter type working from home

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

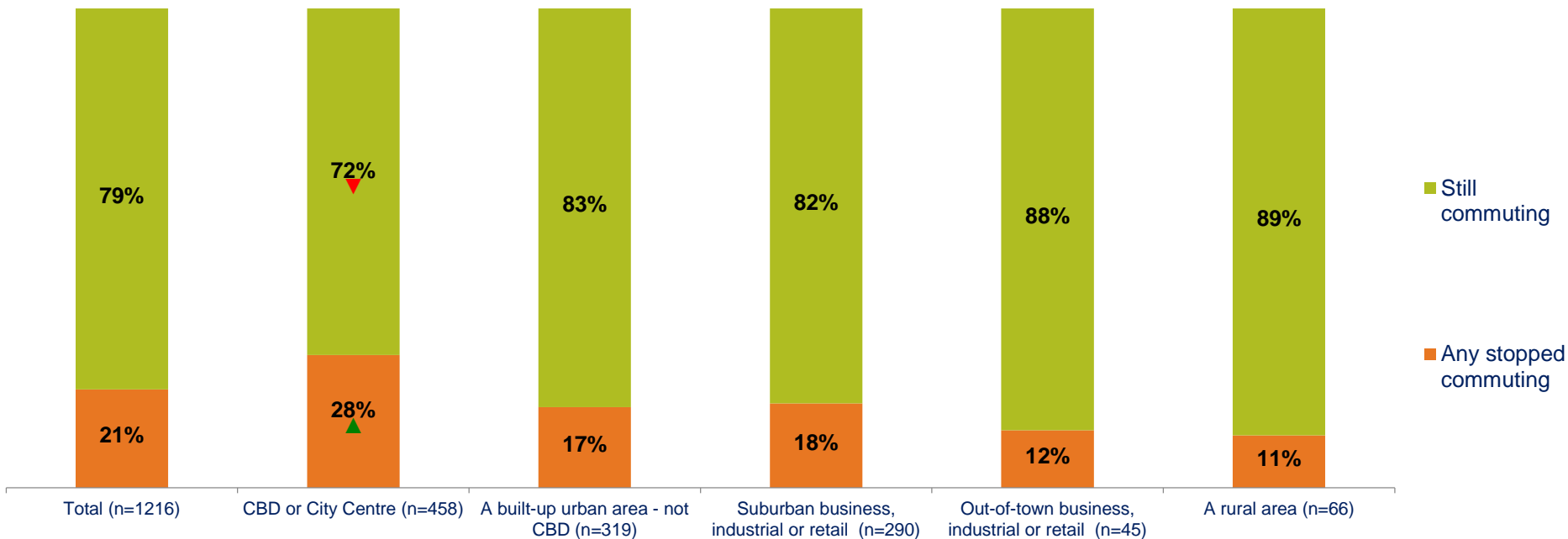
QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you *currently* work? By QMODE1_1 How would you normally make each of the following types of journeys listed below? – travelling to work

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



Nearly three in 10 of those working in CBDs have stopped commuting during the recent lockdown, although this may be a feature of a disproportionate impact on Auckland

Lost commuters by usual work destination



QWORK1A/QWORK2A by QWORK1_DEST: And prior to any public health alert or lockdown, where did you mainly work?/ And where do you *currently* work?/ Thinking about when you normally travel to work, which of the following best describes the location that you would travel to?

Base: all adults 15+ in New Zealand usually working, waves 17 & 18





Section 9 – Access to face masks

Key findings – perceptions of masks

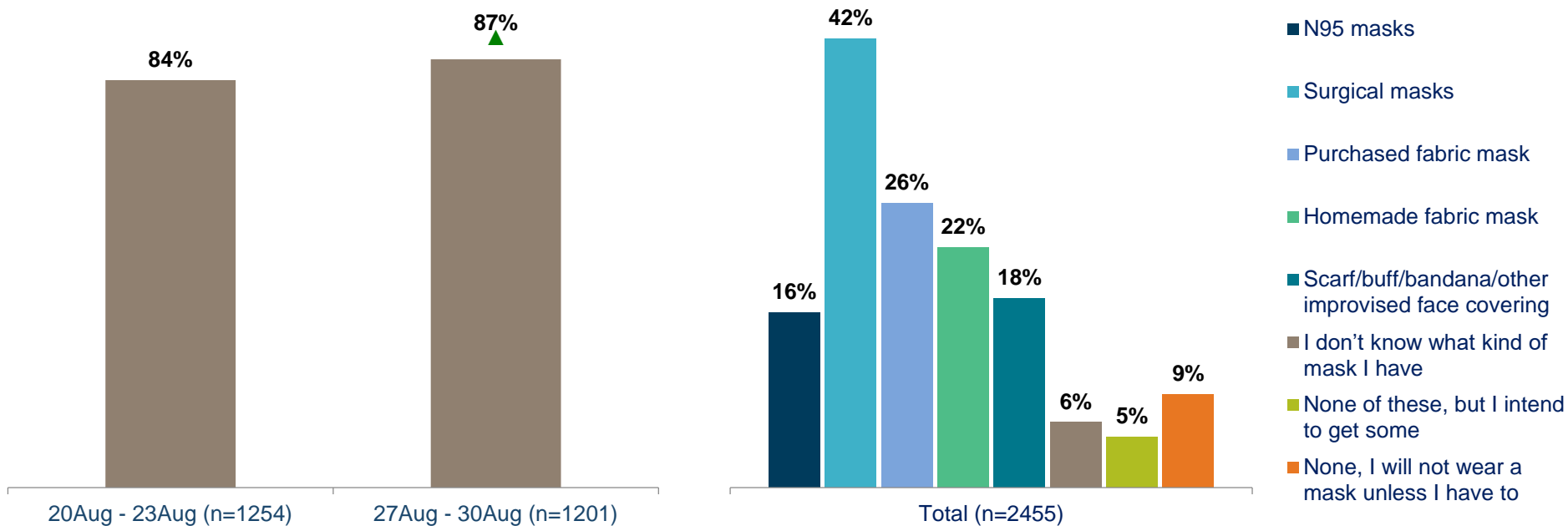
Waka Kotahi objective – understanding behaviour change

- Wearing a face mask on public transport will become compulsory when the entire country reverts to level 2 lockdown restrictions. It therefore important to understanding what barriers in place that may inhibit this behaviour and what actions can be taken to facilitate and/or encourage their use.
- The vast majority of New Zealanders have access to some type of face mask and this has increased following the announcement that they will be compulsory on public transport.
- This increase has been primarily within purchased rather than improvised or homemade masks.
- Access to masks is mostly universal, but it is highest among people who would normally use public transport, in particular bus and train users.
- Older people and Asian communities are the most likely to report mask access. Those with COVID-19 vulnerabilities have close to average, but not universal, reported access whilst those with disabilities have slightly below average levels of access.



Following the announcement that masks will be compulsory on public transport, the proportion reporting access increased during the most recent wave

Access to masks by mask type



QMASK1 What types of masks or face coverings do you currently have access to?
 Base: All adults 15+ in New Zealand



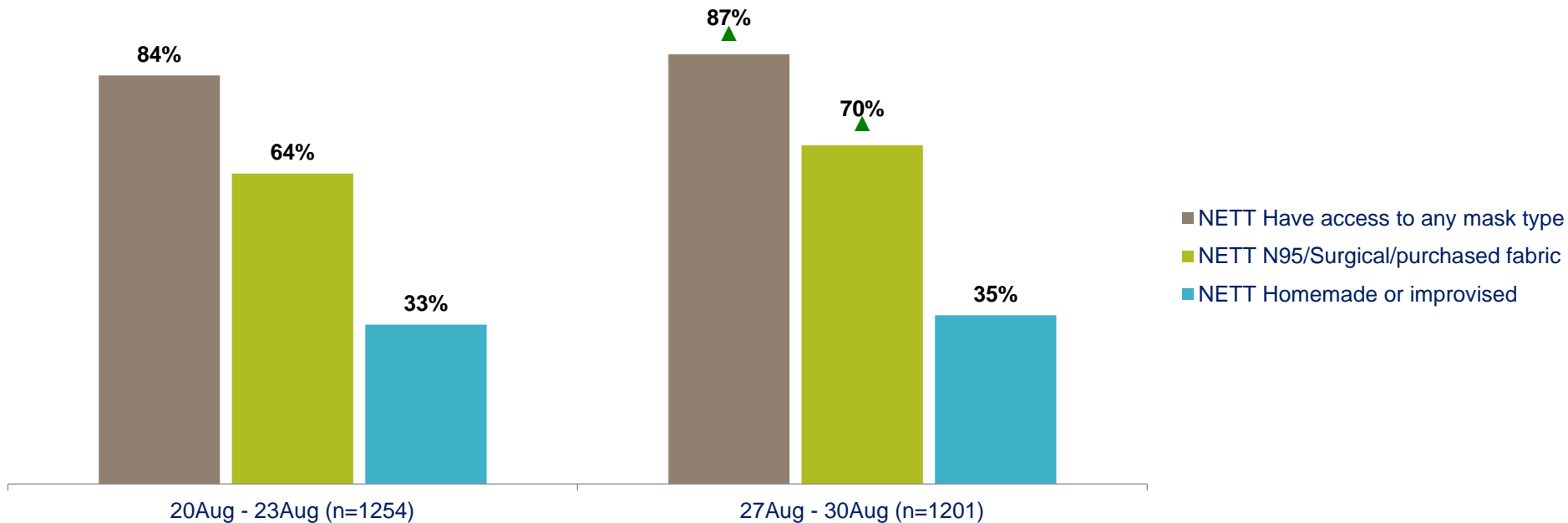
Indicates a statistically significant increase against previous waves



Indicates a statistically significant decrease against previous waves

The increase in mask access has been driven by greater purchasing of manufactured masks rather than homemade or improvised options

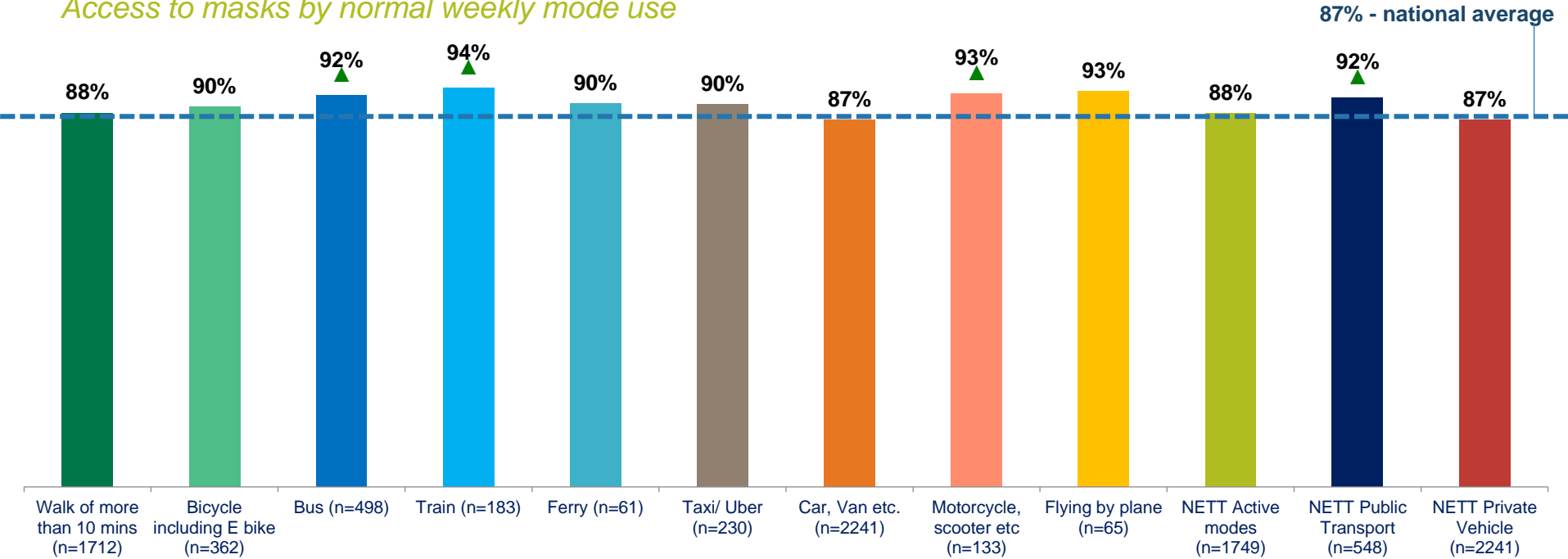
Access to masks by mask type



QMASK1 What types of masks or face coverings do you currently have access to?
Base: All adults 15+ in New Zealand

Mask access is much higher among public transport users than it is among most other areas of the population

Access to masks by normal weekly mode use



QMASK1 What types of masks or face coverings do you currently have access to?
Base: All adults 15+ in New Zealand



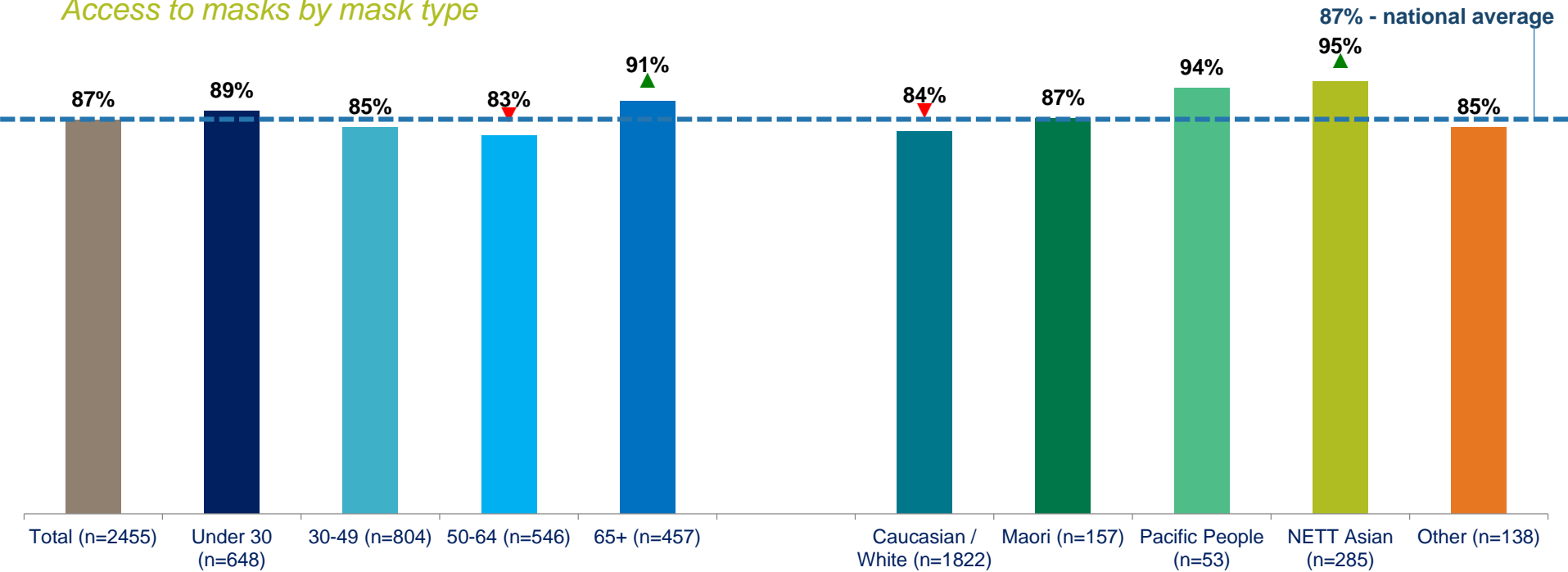
Indicates a statistically significant increase against total sample



Indicates a statistically significant decrease against total sample

Mask access is highest among older age groups, and within Pacific or Asian communities

Access to masks by mask type



87% - national average

QMASK1 What types of masks or face coverings do you currently have access to?
Base: All adults 15+ in New Zealand



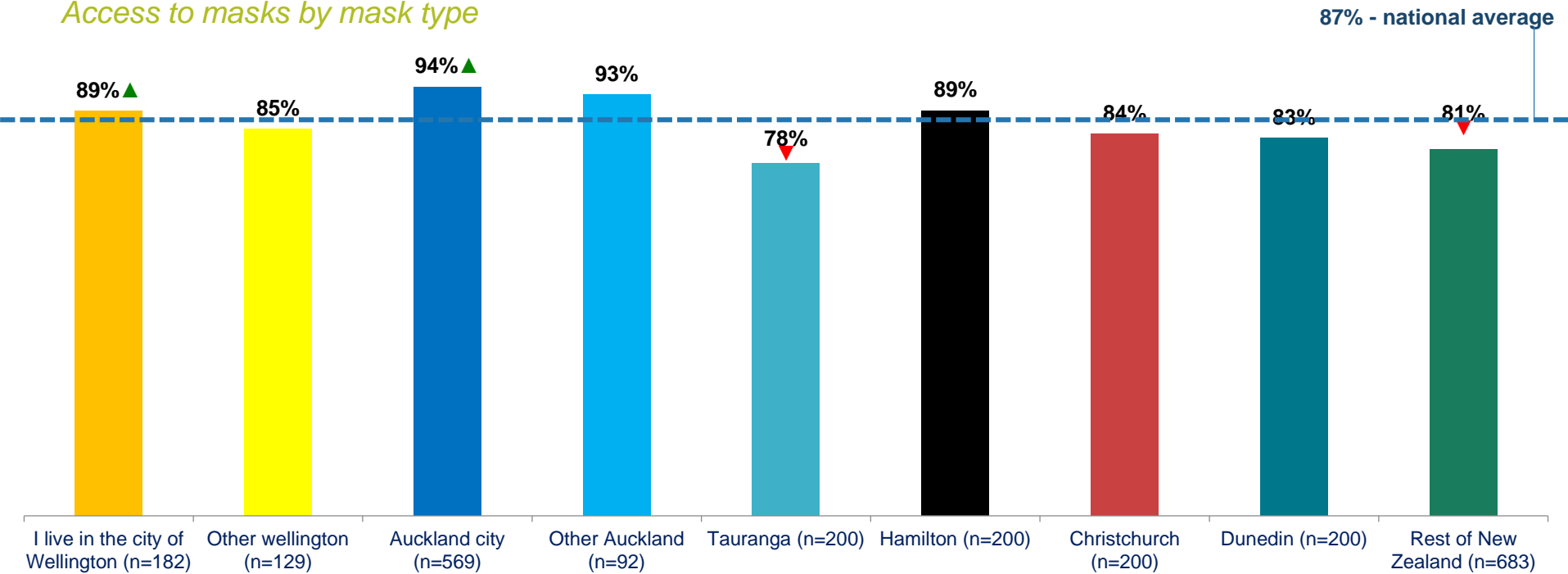
Indicates a statistically significant increase against total sample



Indicates a statistically significant decrease against total sample

Mask access continues to be highest in Auckland when compared with other cities and regions, with access lowest in Tauranga

Access to masks by mask type

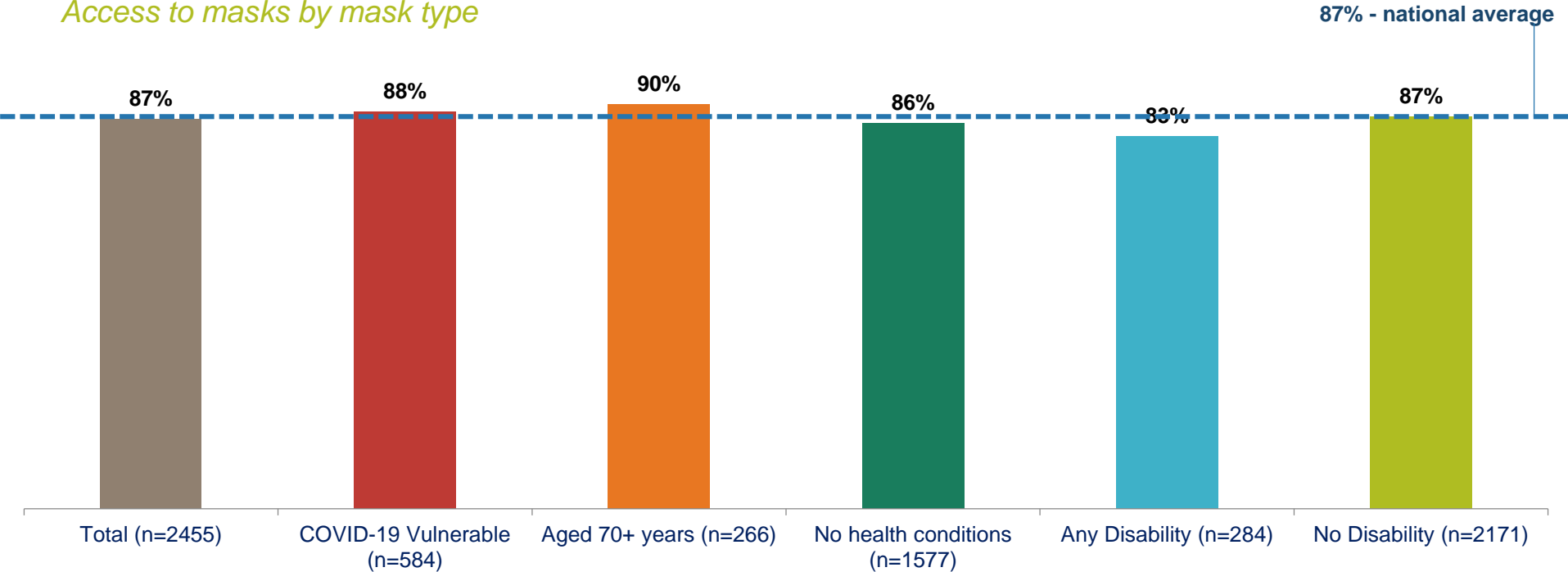


87% - national average

QMASK1 What types of masks or face coverings do you currently have access to?
Base: All adults 15+ in New Zealand

COVID-19 vulnerability factors don't appear to have a significant impact on mask access, although disabled people have below average access

Access to masks by mask type



87% - national average

QMASK1 What types of masks or face coverings do you currently have access to?
Base: All adults 15+ in New Zealand



Section 10 – Access to commerce

Key findings – access to commerce

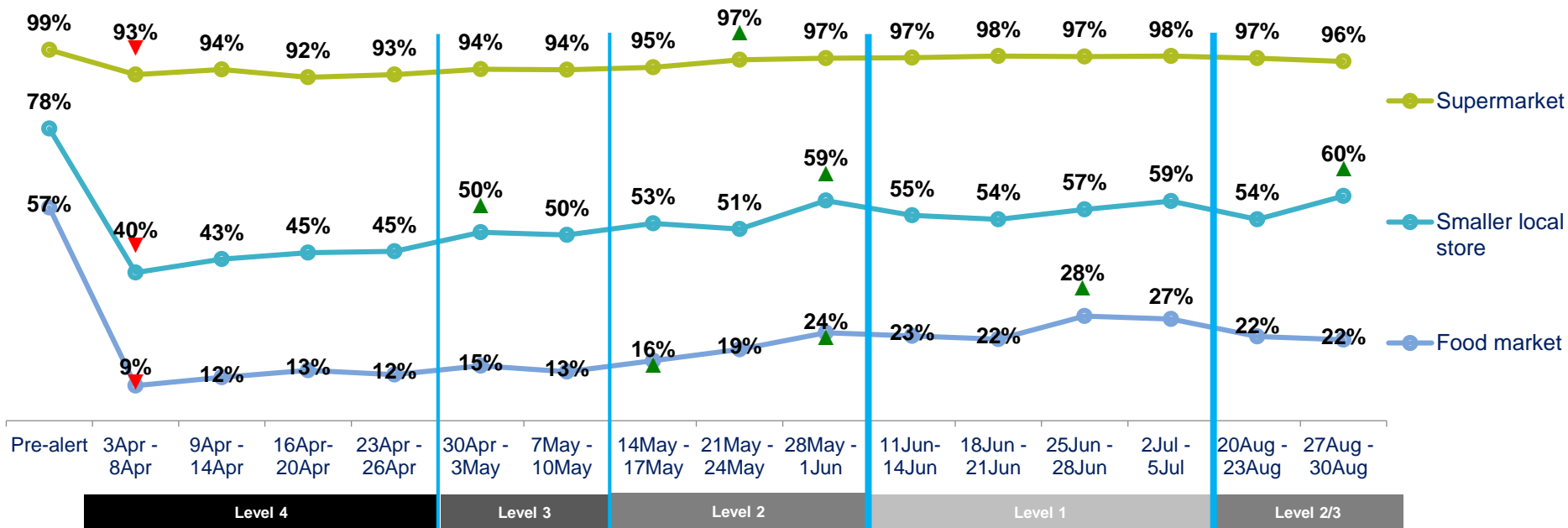
Waka Kotahi objective – understanding behaviour change

- In order to understand the potential long term effects of changing travel behaviour we want to understand the ways in which New Zealanders are adapting to their circumstances and accessing the things they need and want.
- Nationally, the new lockdown hasn't materially impacted on the shopping channels that New Zealanders choose to use. However, within Auckland there has been a statistically significant increase in the usage of online supermarkets and a steady directional increase in the use of online specialist retailers.
- Outside of Auckland, there has been a significant increase in the reported use of smaller local stores during this wave.
- In terms of the shopping experience, Aucklanders currently describe this as being harder than those outside of Auckland do. For those outside of Auckland, more than half say the experience is no different to what it was in February.



Nationally, physical stores have not been hugely impacted by the new lockdown, with a significant increase in smaller store usage this wave

Normal week and most recent week shopping trips taken by survey wave – physical store

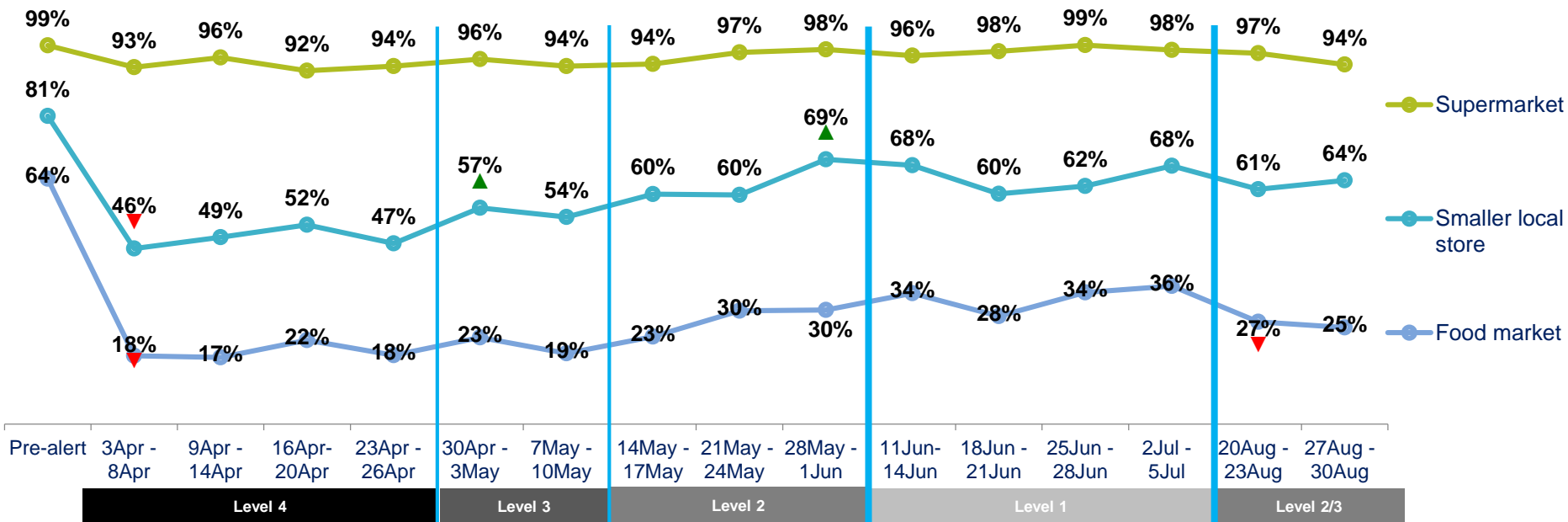


QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days?

Base: all adults who ever grocery shop in New Zealand

There has been little change in use of physical store types in Auckland during the new lockdown

Normal week and most recent week shopping trips taken by survey wave – Auckland, physical



QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days?

Base: all adults who ever grocery shop in New Zealand



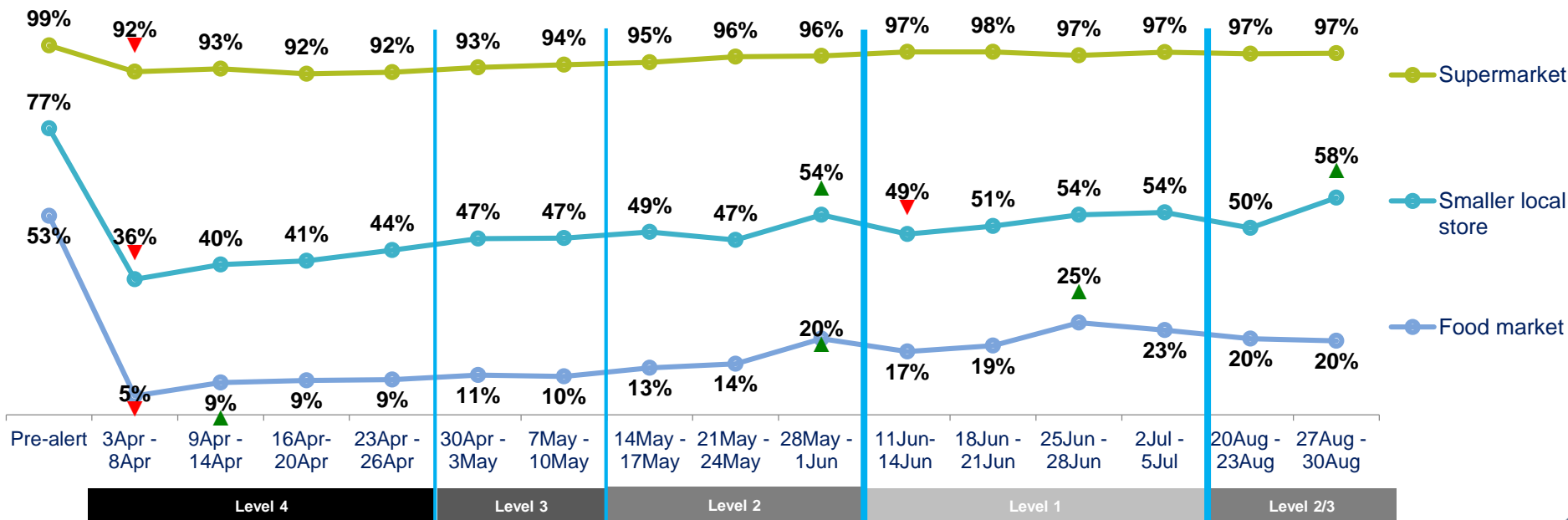
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The big increase in usage of smaller local stores has largely occurred outside of Auckland

Normal week and most recent week shopping trips taken by survey wave – rest of New Zealand, physical



QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days?

Base: all adults who ever grocery shop in New Zealand



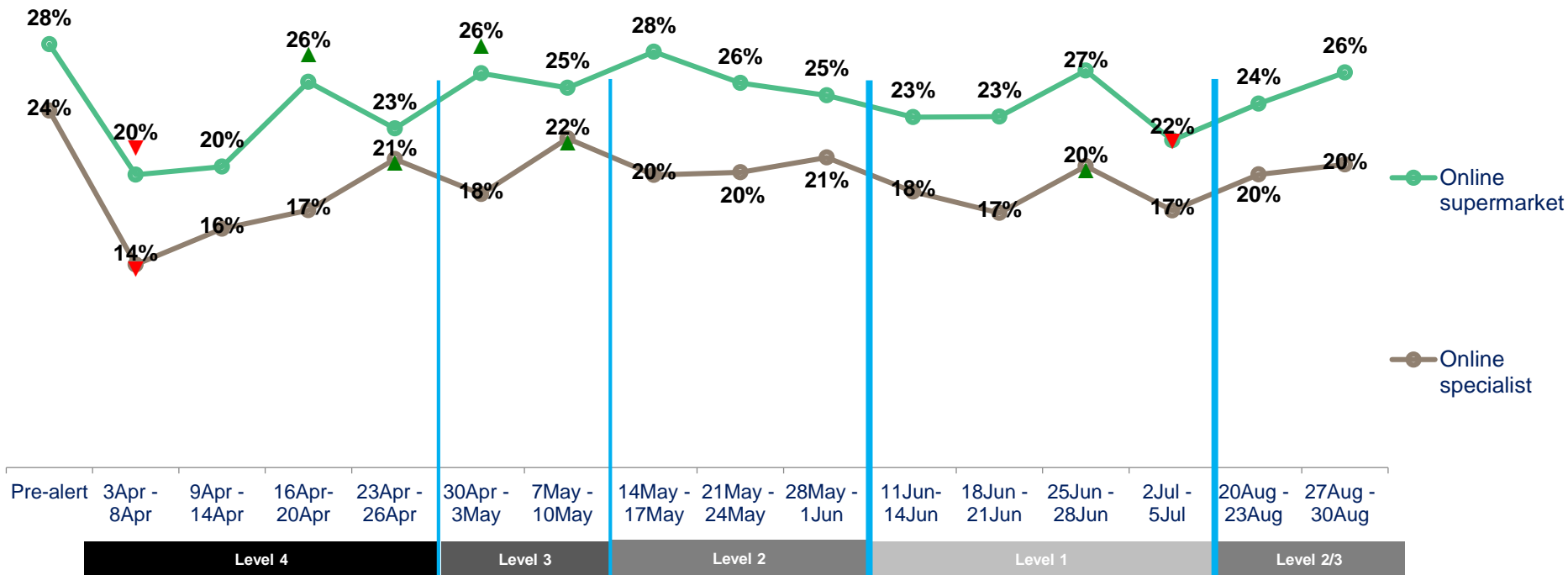
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

The new lockdown has seen a steady directional increase in the proportion reporting at least weekly shop at an online supermarket

Normal week and most recent week shopping trips taken by survey wave – online modes

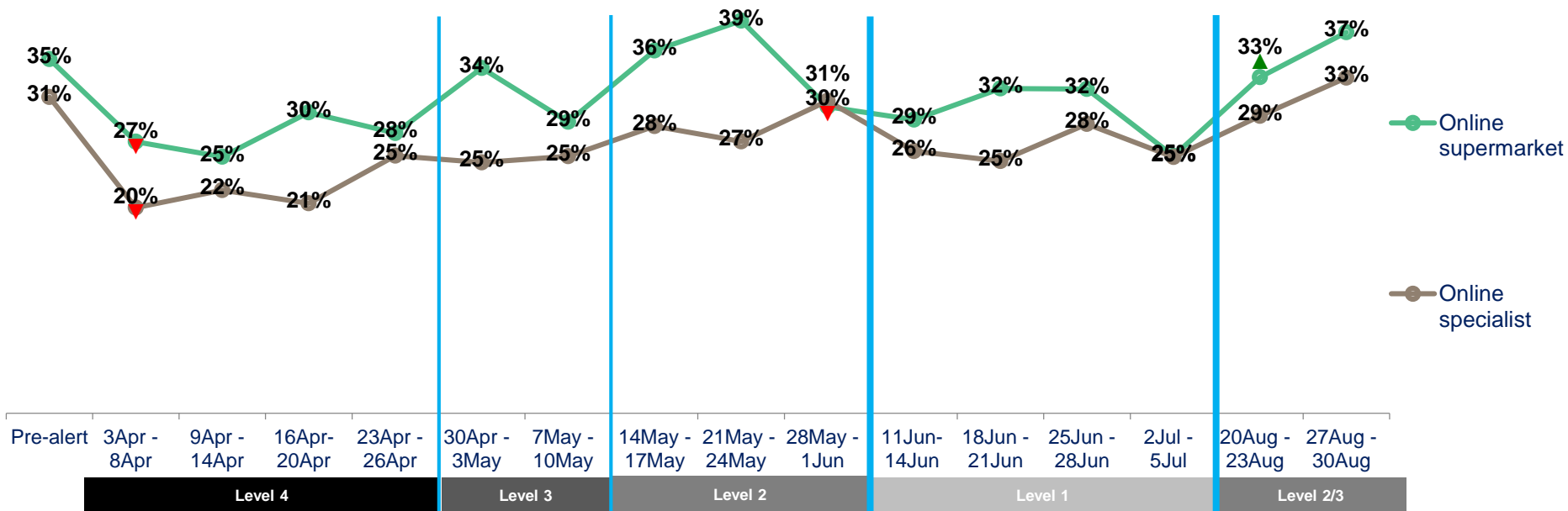


QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days?

Base: all adults who ever grocery shop in New Zealand

This increase has primarily occurred in Auckland, which saw an eight point jump at the start of the new lockdown, with online specialist usage at the highest level recorded

Normal week and most recent week shopping trips taken by survey wave – Auckland, online

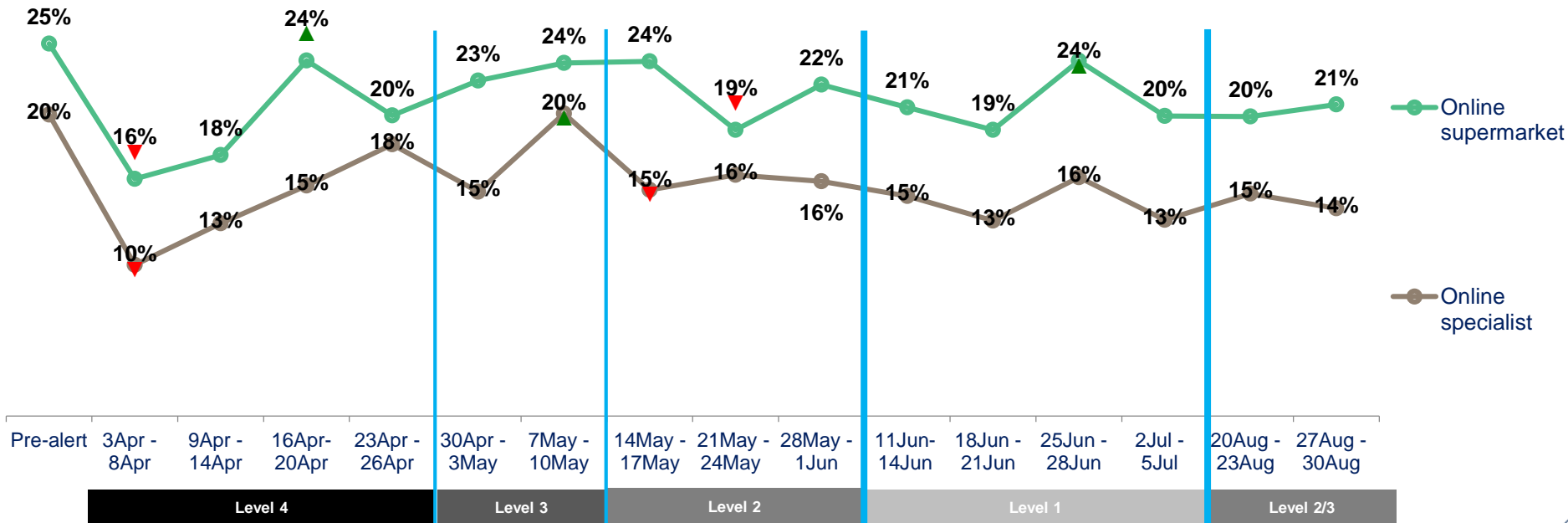


QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days?

Base: all adults who ever grocery shop in New Zealand

Outside of Auckland, online supermarket and specialist grocery shopping has remained stable during the new lockdown period

Normal week and most recent week shopping trips taken by survey wave – rest of New Zealand, online

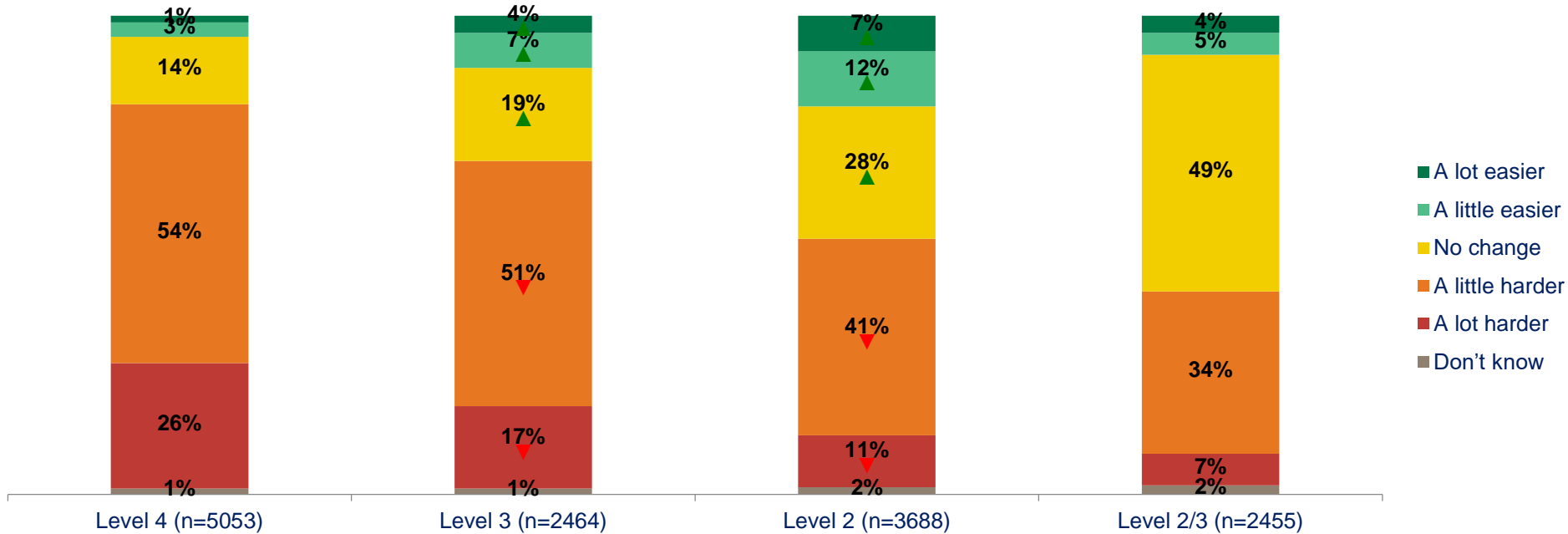


QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past seven days?

Base: all adults who ever grocery shop in New Zealand

The presence of some queues and contact tracing apps doesn't appear to have materially impacted on perceptions of shopping as harder than before

Relative difficulty of shopping in past week by alert level



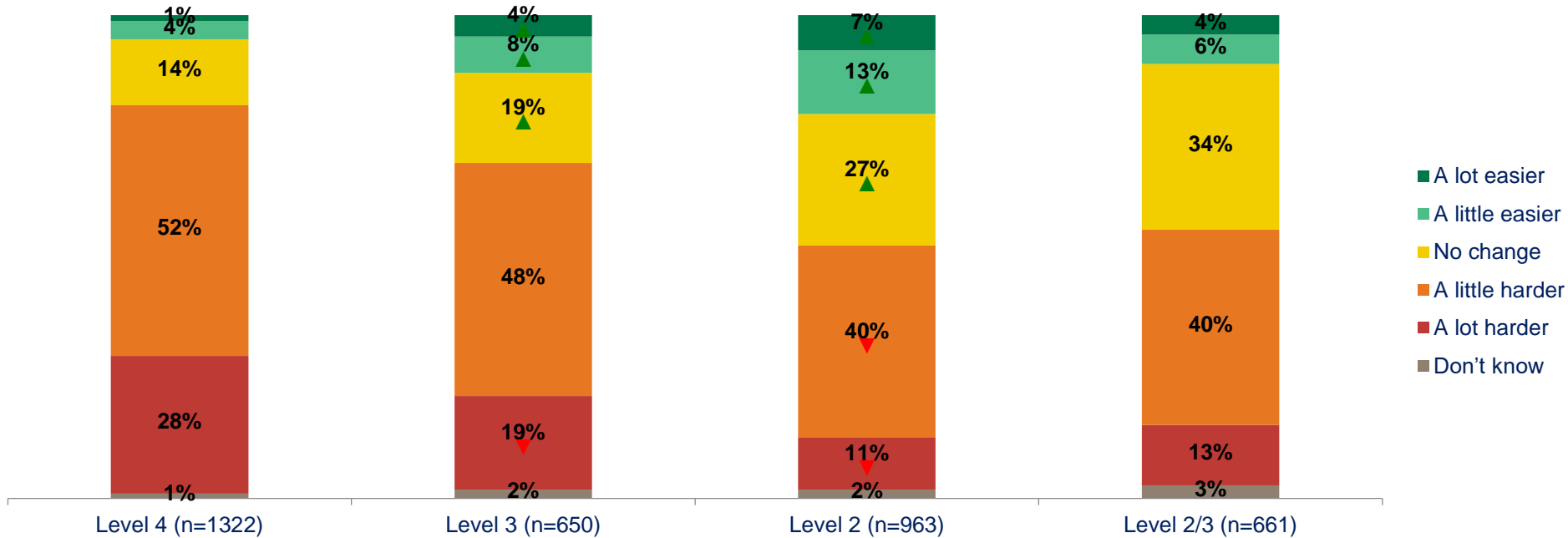
QSH2A. Shopping ease percentages - To what extent has shopping for the groceries and household essentials that you need been easier or harder during the past week than it was prior to any public health alert or lock down?

Base: all adults 15+ in New Zealand



Aucklanders are generally indicating that grocery shopping is roughly as hard as it was in level 2

Relative difficulty of shopping in past week by alert level – Auckland



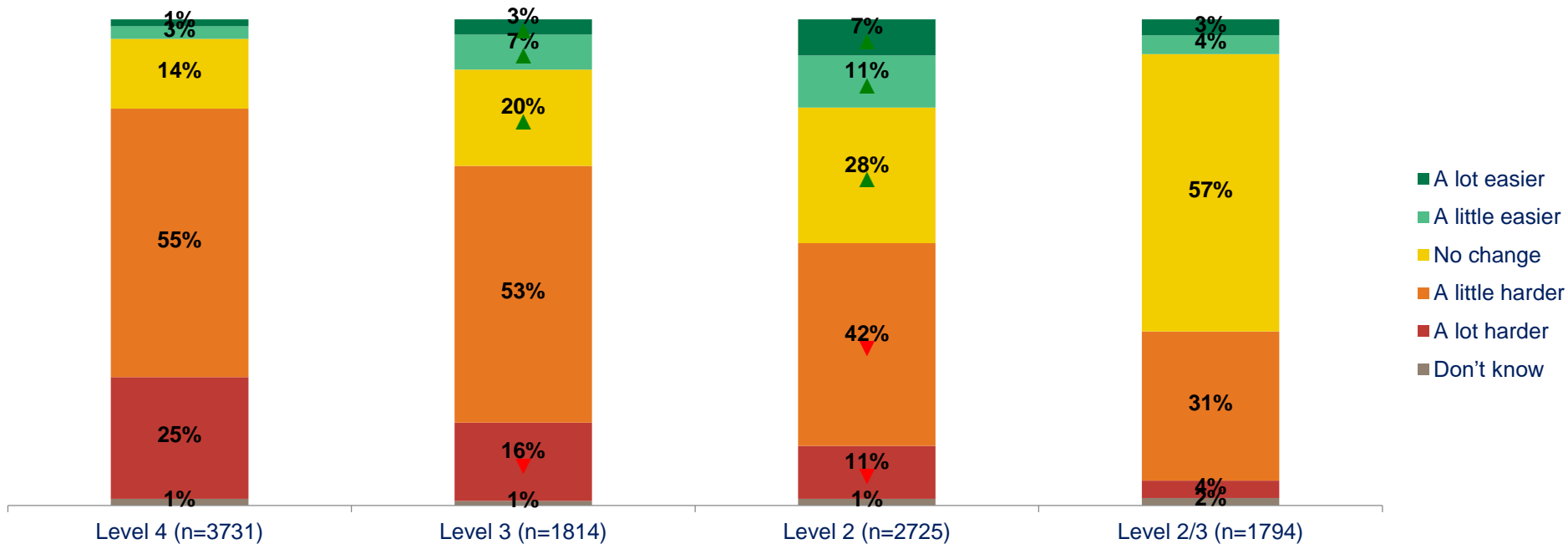
QSH2A. Shopping ease percentages - To what extent has shopping for the groceries and household essentials that you need been easier or harder during the past week than it was prior to any public health alert or lock down?

Base: all adults 15+ in New Zealand



Outside of Auckland, the majority of shoppers say that the experience is no easier or harder than it was in February

Relative difficulty of shopping in past week by alert level – rest of New Zealand



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



