

# Waka Kotahi COVID-19 transport impact

Fieldwork waves 1–19 core report

8 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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## 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, whilst wave 17 fieldwork and reporting was undertaken 3 weeks after wave 16 as fieldwork was brought forward from an intended monthly cycle due to an outbreak of COVID-19 community cases. Waves 17, 18 & 19 are weekly.

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
  - 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 nineteen 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, the combined sum of wave 17, 18 and 19, as well as individual waves
- 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 19 report is based on a statistically significant shift of results between waves 1 to 19, 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 vs. level 2.5/2 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	Alert Level 2.5 (AKL) Alert level 2 (Rest of NZ)
18	Thursday 27 August to Sunday 30 August	
19	Thursday 3 September to Sunday 6 September	



# Report notes (ii)

## Key transport terms and demographic groupings

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

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

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

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

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

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

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

# Sample structure and further definitions


	Definition	Waves 1 - 4		Waves 5 - 6		Waves 7 - 10		Waves 11 - 16		Waves 17 - 18		Wave 19	
		Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MoE*	Sample	MOE*	Sample	MOE*
Total		n=5,060	1.38	n=2,532	1.95	n=5,043	1.38	n=7,561	1.13	n=2,455	1.98	n=1,219	2.81
Auckland	All in Auckland Region, including city and surrounding rural areas	n=1,324	2.69	n=662	3.81	n=1,324	2.69	n=1,964	2.21	n=661	3.81	n=331	5.39
Tauranga	All living in the city of Tauranga	n=400	4.9	n=200	6.93	n=400	4.9	n=599	4.0	n=200	6.93	n=75	11.32
Hamilton	All living in the city of Hamilton	n=400	4.9	n=200	6.93	n=400	4.9	n=600	4.0	n=200	6.93	n=100	9.8
Wellington	All in Wellington Region, including city and surrounding rural areas	n=684	3.75	n=418	4.79	n=799	3.47	n=1,129	2.92	n=311	5.56	n=173	7.45
Christchurch	All living in the city of Christchurch	n=400	4.9	n=200	6.93	n=400	4.9	n=601	4.0	n=200	6.93	n=100	9.8
Dunedin	All living in the city of Dunedin	n=398	4.91	n=200	6.93	n=392	4.95	n=607	3.98	n=200	6.93	n=90	10.33
Rest of NZ	All living in areas outside of those noted above	n=1,454	2.57	n=652	3.84	n=1,328	2.69	n=2,061	2.16	n=683	3.75	n=350	5.24
<b>Disability, Vulnerability and COVID-19**</b>													
Any Disability	See previous page	n=550	4.18	n=297	5.69	n=611	3.96	n=866	3.33	n=284	5.82	n=160	7.75
COVID-19 Vulnerable	See previous page	n=1,230	2.79	n=597	4.01	n=1,139	2.9	n=1,640	2.42	n=584	4.06	n=280	5.86
Aged 70 + years	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over	n=618	3.94	n=315	5.52	n=627	3.91	n=830	3.4	n=266	6.01	n=118	9.02

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

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

# Context: New Zealand COVID-19 timeline




The background image shows a group of cyclists and a pedestrian on a paved path. In the foreground, a cyclist in a red jacket and a white helmet is riding towards the camera. Behind them, another cyclist in a dark blue jersey is visible. To the left, a pedestrian in a dark jacket and a grey hat is walking away from the camera. The scene is set outdoors with trees and a bright sky, suggesting a park or a recreational area. A diagonal blue overlay covers the top-left portion of the image.

## Section 2 – Waka Kotahi transport key findings summary

# Key findings – waves 1–19

## Waka Kotahi COVID-19 transport impact tracker

- Wave 19 of fieldwork is the third wave under a split level condition, with Auckland now under a level '2.5' lockdown for the preceding week and the rest of New Zealand remaining under level 2 for the third consecutive week.
- Nationally, concerns about infection have declined directionally, stabilising in Auckland and slightly declining in areas outside of Auckland. Economic concerns have also stabilised following some variation at regional levels in week 18.
- As expected, self-isolation behaviours within Auckland have decreased, resulting in a notable national decline in this reported behaviour. Within Auckland, self isolation is occurring at roughly the same rate as recorded during the original level 2 lockdown in May/June.
- Auckland has been the big driver of journey changes during this wave, as the relaxation of alert levels in the region drove statistically significant increase in essential daily journeys such as work and school trips, as well as non-essential journeys like non-grocery shopping and travel for leisure purposes.
  - This has resulted in national increases in reported journeys, particularly in non-essential journeys, which decreased dramatically at the start of the August lockdown. However, longer-distance inter-regional travel is appearing to be much slower to recover.
- A big benefactor of the loosening travel restrictions in Auckland has been public transport. Reported weekly usage (travelled at least once) of all public transport modes continued to recover significantly in Auckland, with all except for buses now at reported usage levels close to those reported as being the norm pre-lockdown.
  - At a national level this has driven up reported public transport usage, even though the recovery elsewhere in New Zealand has been slower, although buses and trains are still some way short of reported pre-lockdown usage.
  - Consideration continues to be a lead indicator of future usage, and has grown again this wave indicating potential for sustained growth in public transport usage.
  - As more people return to their daily travel routines and public transport modes as part of that, the proportion who cite reduced need as a barrier to public transport has fallen whilst transmission concerns have continued to increase.
  - Nationally, only 6% of those with reduced use say they are staying off public transport because they do not want to wear a mask, and mask access continues to grow among public transport users.
- There have been no significant changes in intention and expected volume of domestic tourism travel this wave, and whilst COVID-19 has begun to reduce directionally as a reason not to travel, expected disruption as a reason not to travel continues to grow.
- Despite moving to lower level travel restrictions, there hasn't been any significant shift in the proportion of Aucklanders working from home, with the big change in this behaviour occurring the preceding week.
  - Working from home continues to have a dis-proportionate impact on the public transport network, compared to the road network.
- The change in lockdown restrictions within Auckland has arrested the growth in online grocery shopping, but this has not begun to decline in line with loosening restrictions.

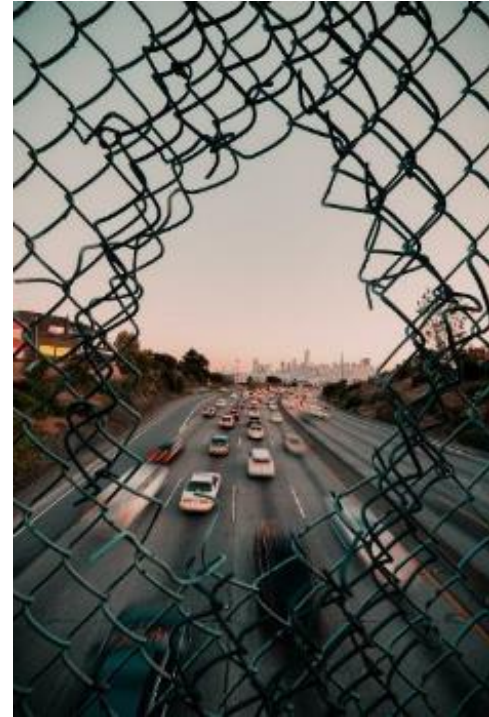
A photograph of a person walking and two cyclists on a path, with a diagonal blue overlay. The person on the left is wearing a dark jacket and a hat, carrying a bag. The two cyclists are in the foreground, one in a red jacket and one in a dark jacket, both wearing helmets. The background shows trees and a bright sky. A diagonal blue overlay covers the top right and bottom left portions of the image.

## Section 3 – Context

# Key findings – context

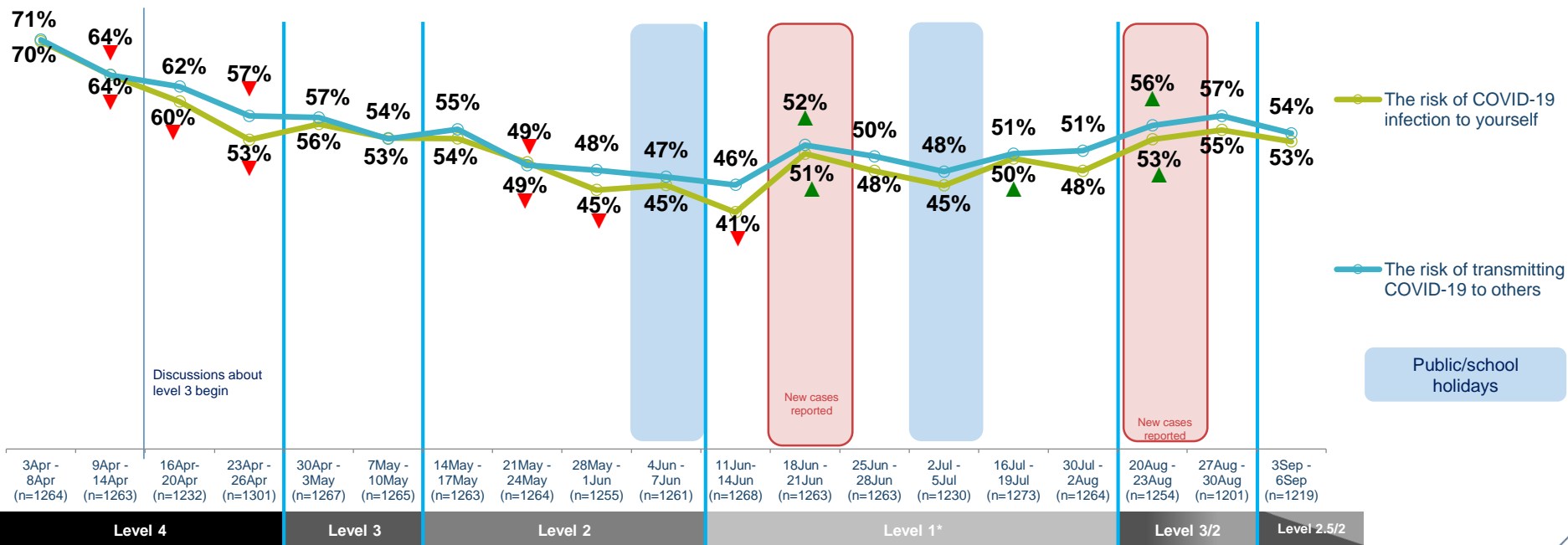
## Waka Kotahi objective – how do general attitudes and fears impact transport usage?

- 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 the first week of what has been called a level 2.5 lockdown in Auckland, with the rest of New Zealand in the third week under level 2, following a split level lockdown in response to community transmissions in Auckland.
- Nationally, concerns about infection have declined a little directionally, stabilising in Auckland and slightly declining in areas outside of Auckland
- However, it should be noted that this concern has not seen a sustained decrease since new cases were reported at the border in June, with a persistent wariness within the population, around half of whom feel concerned about transmission and infection.
- Economic concerns have stabilised following some variation at regional levels in week 18.
- Self isolation behaviours still persist at a slightly lower level than in the previous two waves, with nearly a third nationally who report at least partially self-isolating. This decrease has been driven by changes in Auckland, which experienced a change in alert level and travel restrictions this week, but is still some way higher in the city than it was during level 1.
- Most people, both in and out of Auckland report that they were better able to adjust to travel restrictions during this second lockdown than they were during the first.



# Nationally, concerns about COVID-19 are now equal to, or lower than they were when new community transmission cases were reported in August

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

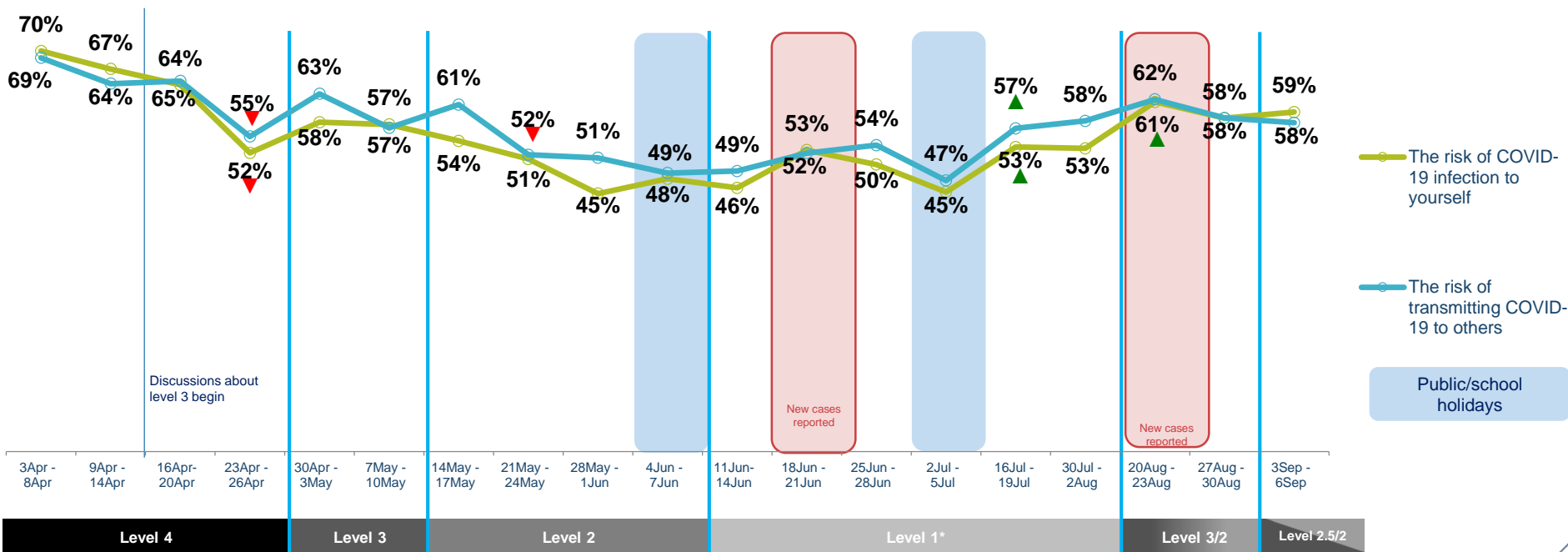


Indicates a statistically significant decrease from previous time period



# These concerns declined directionally in Auckland after one week, but they have not declined further since the local alert level was downgraded

## COVID-19 concerns (NETT all concerned)- Auckland

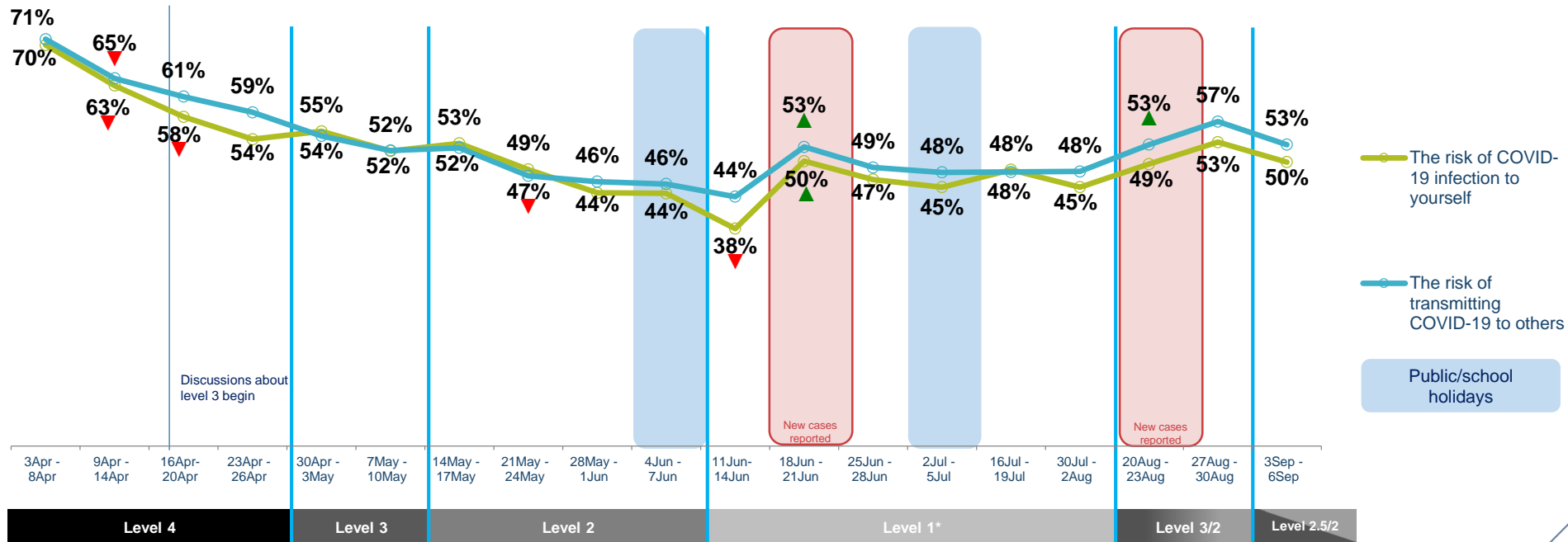


QPTUSE3. How personally concerned are you about each of the following?  
 Base: all adults 15+ in Auckland (c.330 per wave)



# Outside of Auckland, transmission concerns have returned to rates seen at the start of the split level lockdown

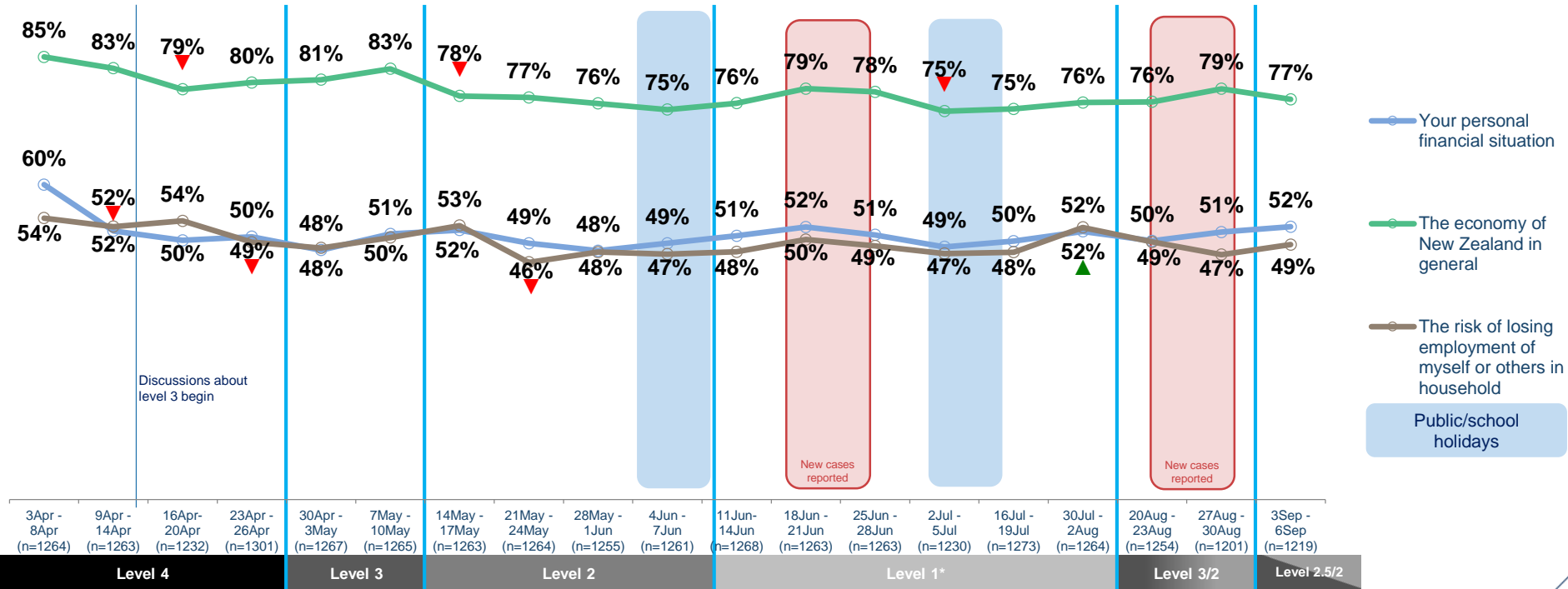
COVID-19 concerns (NETT all concerned) – rest of New Zealand



QPTUSE3. How personally concerned are you about each of the following?  
 Base: all adults 15+ not living in Auckland (c. 900 per wave)

# Financial concerns have been relatively stable at a national level during this time

## COVID-19 concerns (NETT all concerned)



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



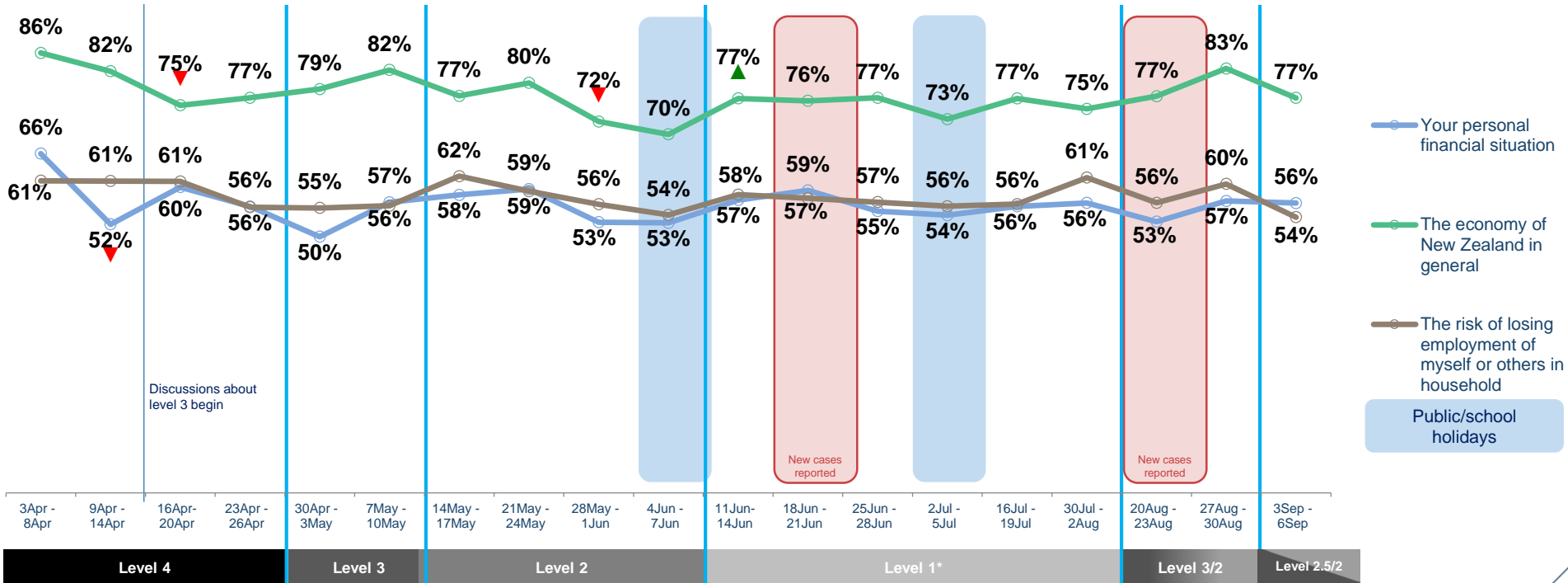
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Although there were some directional increases in the preceding week, economic concerns in Auckland have fallen away again

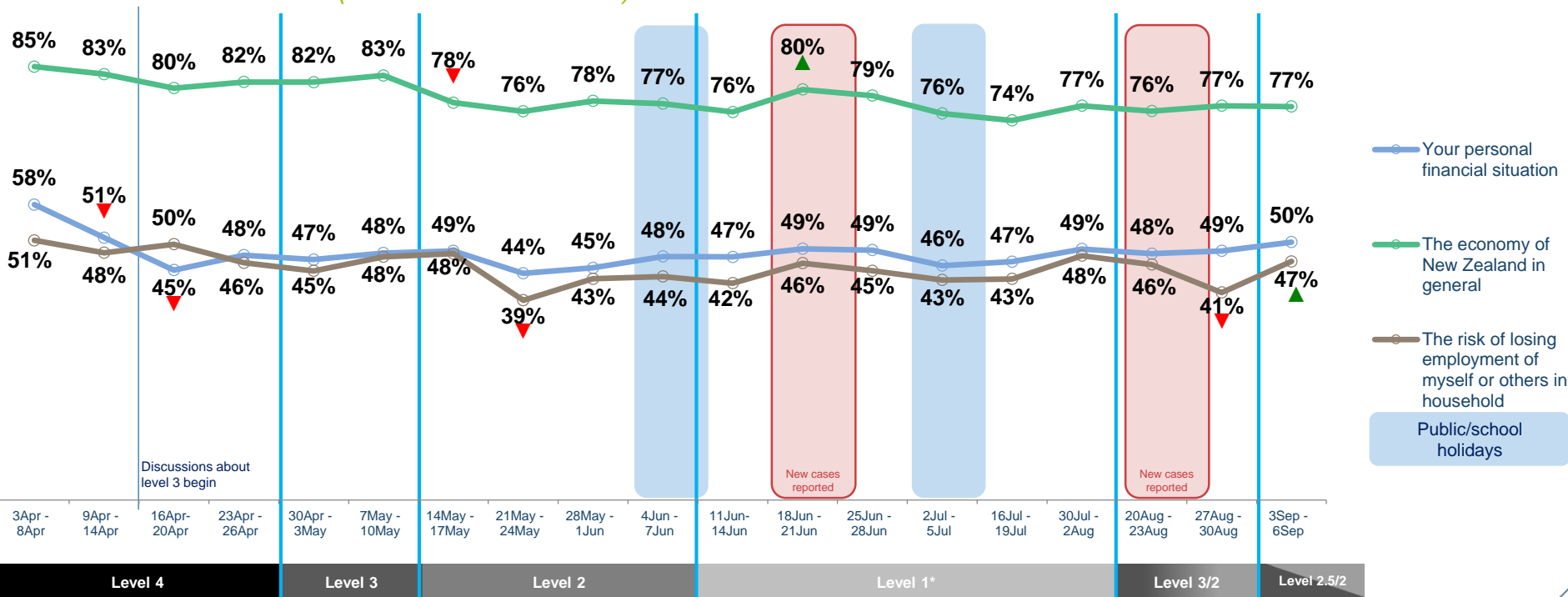
## COVID-19 concerns (NETT all concerned)- Auckland



QPTUSE3. How personally concerned are you about each of the following?  
 Base: all adults 15+ in Auckland (c.330 per wave)

# Outside of Auckland, economic concerns have remained stable, although there has been a statistically significant reversion when it comes to concerns 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+ not living in Auckland (c. 900 per wave)



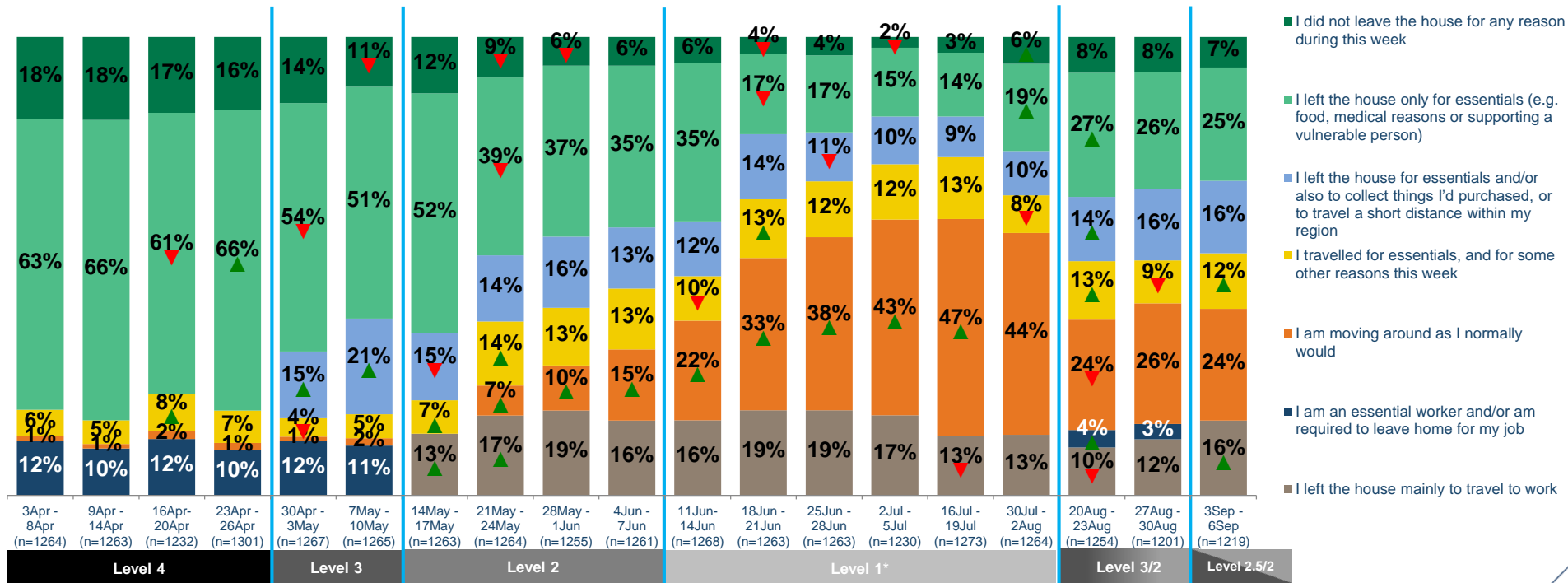
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Nationally, the change in alert level in Auckland has had a minor impact on out of home travel, although nearly a third are at least partially self-isolating still

*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



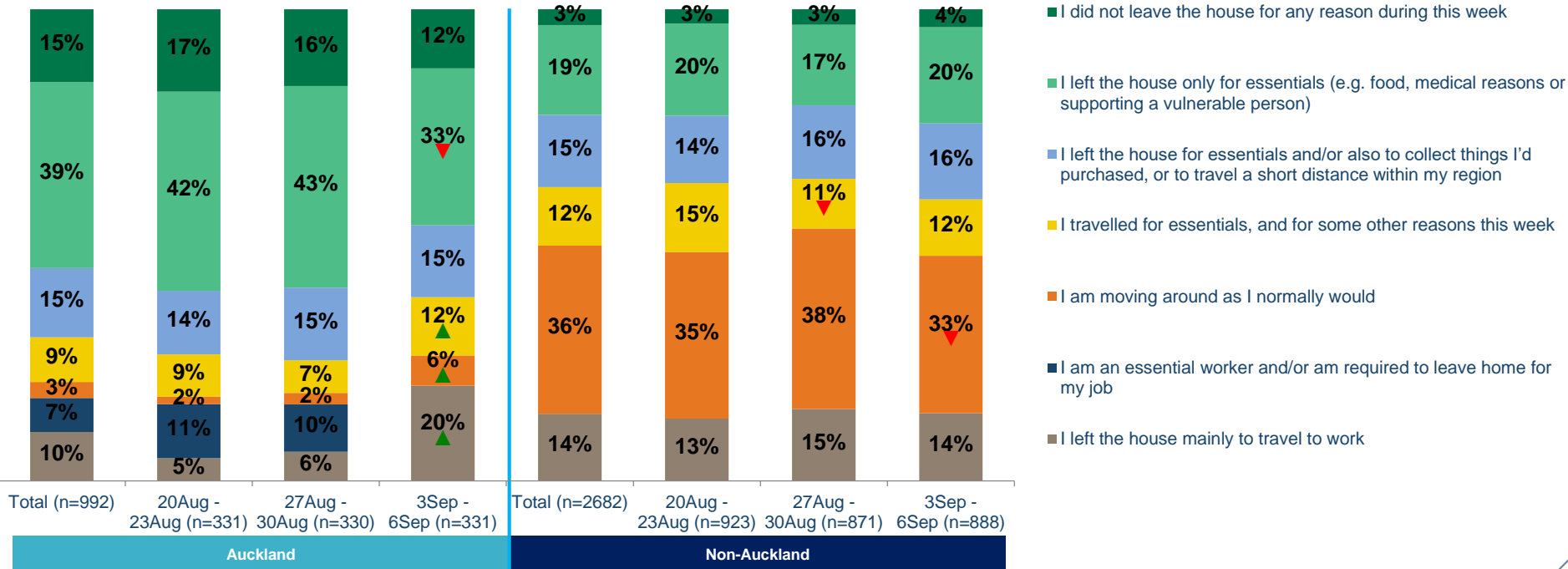
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Self isolation has declined within Auckland, although more than two in five are still self-isolating and only 6% say they're moving around as normal

*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?



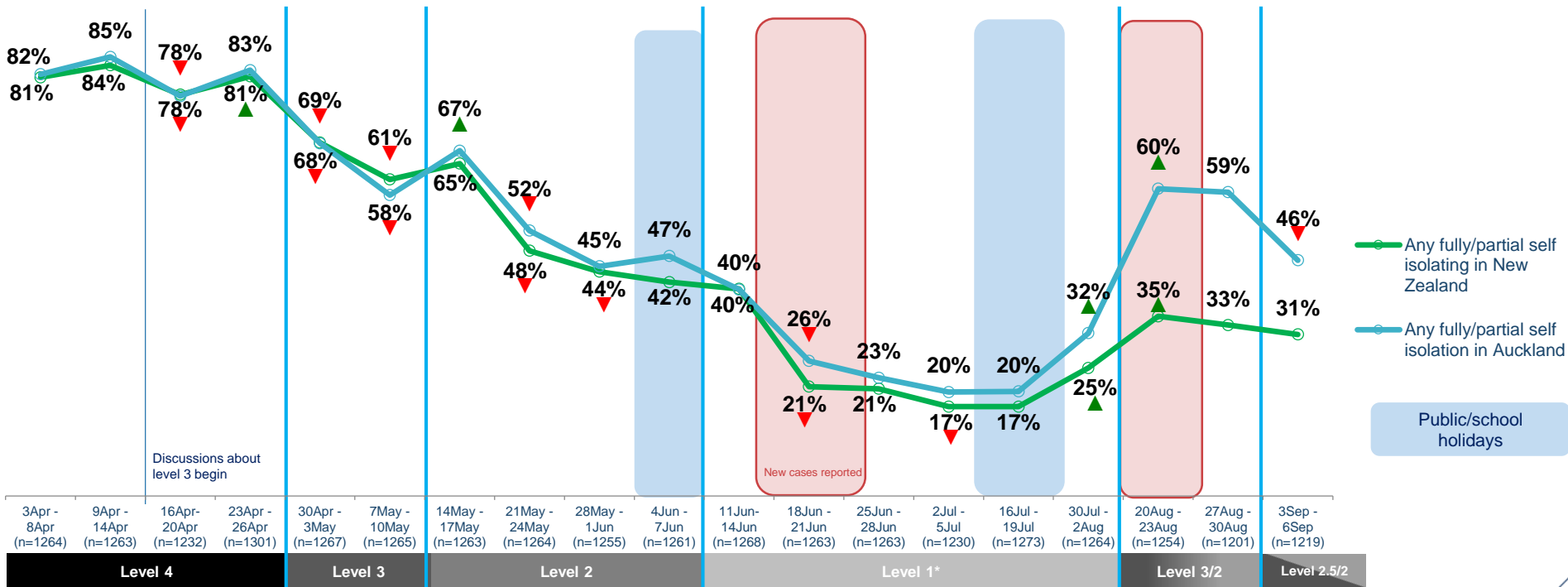
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# The proportion self-isolating in Auckland nearly doubled at the start of the new lockdown, but has declined to levels seen in May/June level 2 this wave

## Self isolation over time

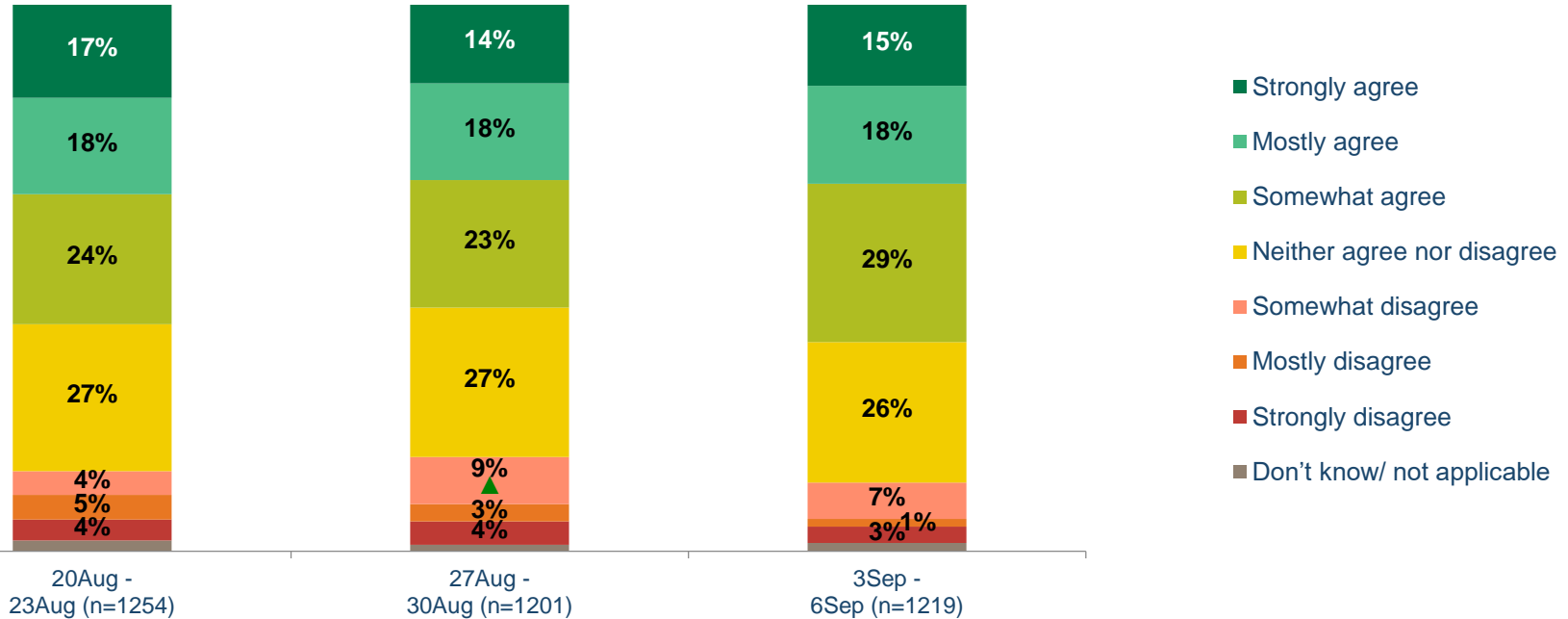


ISO\_1\_TRAVEL. Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?



# In the recent lockdown, the majority of New Zealanders believed that they were able to better adjust this time with this is true to the same extent in and out of Auckland

*I was able to adjust better to travel restrictions and get the things I need than I was following the first outbreak of COVID-19*



QATT. To what extent do you agree or disagree with the following statements?  
 Base: all adults 15+ in New Zealand



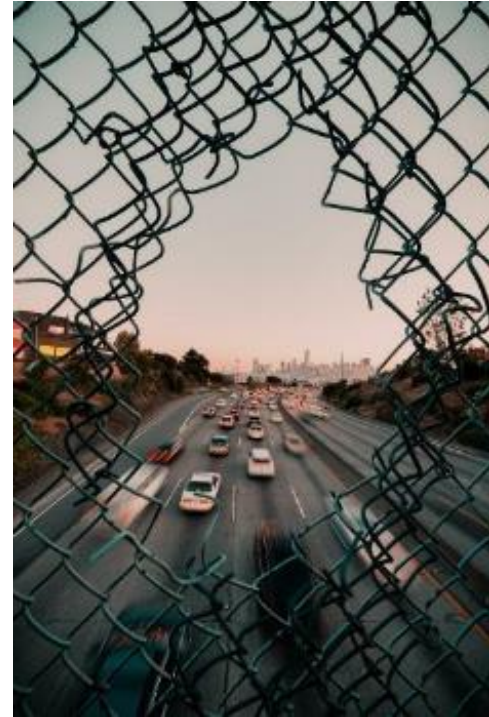


## Section 4 – Local and domestic journeys

# Key findings – local and domestic journeys

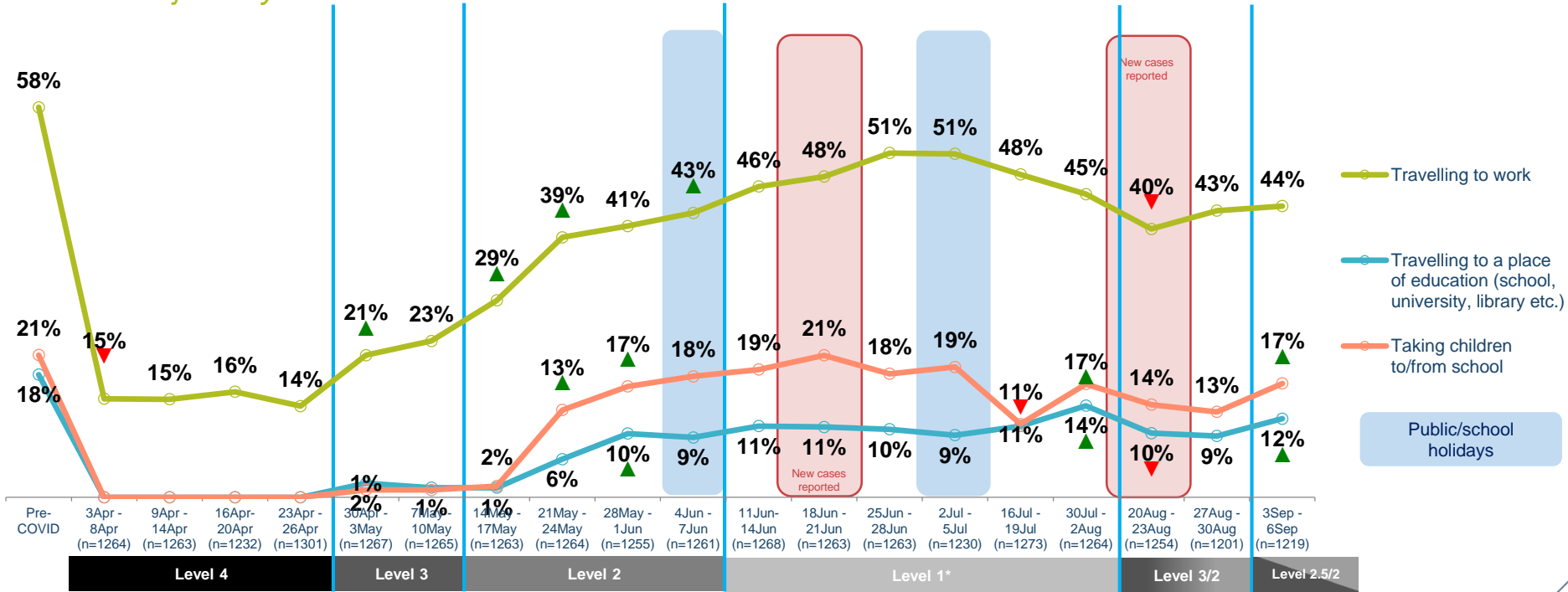
## Waka Kotahi objective – how is travel changing?

- 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.
- As Auckland is the only area to experience a change in lockdown level during this week, there has been a more pronounced recovery in the proportion taking each type of journey here, which is driving up reported journeys at a national level.
- With loosening restrictions, more Aucklanders are returning to work, education and taking their children to school, with reported rates of these daily journeys echoing those recorded during the first level 2 lockdown in May/June.
- Outside of Auckland, the proportion reporting these journeys has been relatively stable.
- For the first time since the reporting of community transmission cases at the end of August, there has been a statistically significant recovery in the proportion travelling for non-essential reasons. Again, this was most pronounced in Auckland, where reported incidences of this sort of travel fell to a greater extent at the start of the new lockdown.
- Comparatively, longer distance domestic journeys, like holidays and visits to friends and family, appear to be recovering much more slowly with no statistically significant gains and reported rates still some way behind those recorded during the first level 2 lockdown in May/June.



# Nationally, the proportion taking children to and from school has returned to levels seen before the new lockdown

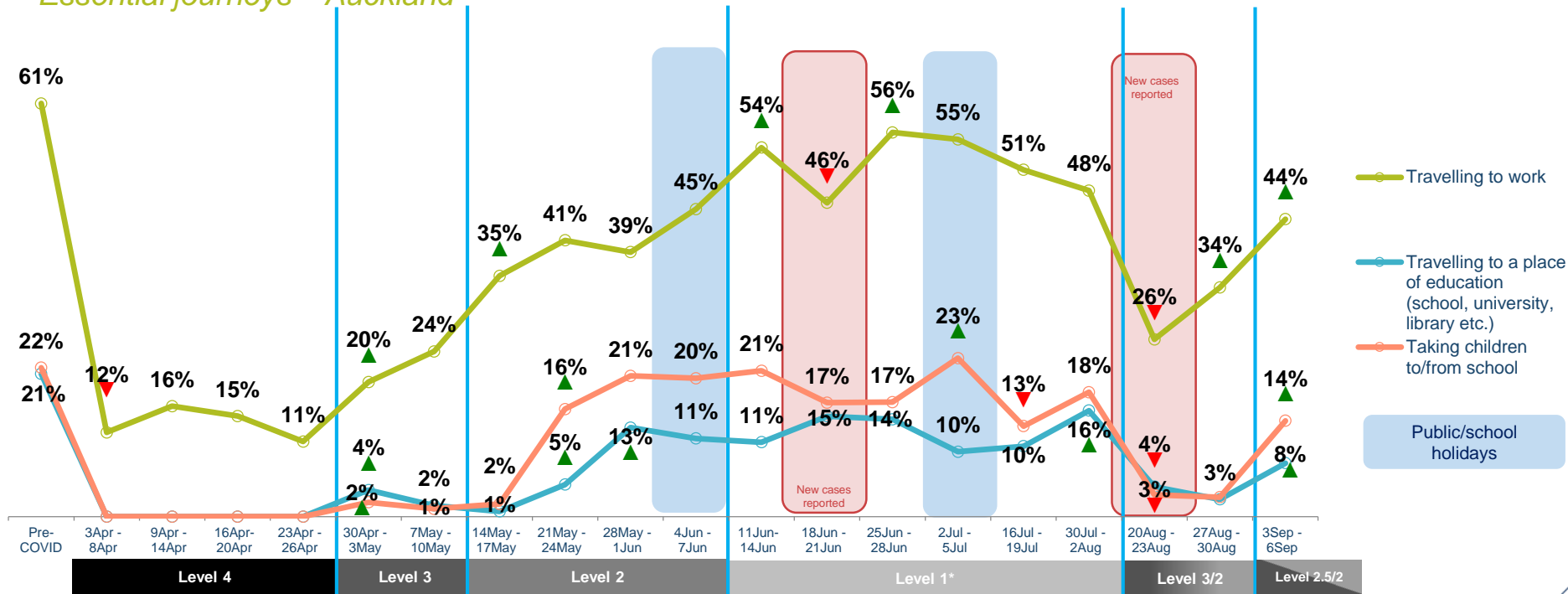
## Essential journeys



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 19 (n= between 1,230 – 1,300)

# The relaxing of alert levels in Auckland has seen most daily journeys recover, if not to rates seen in level 1, at least closer to those seen in May/June level 2

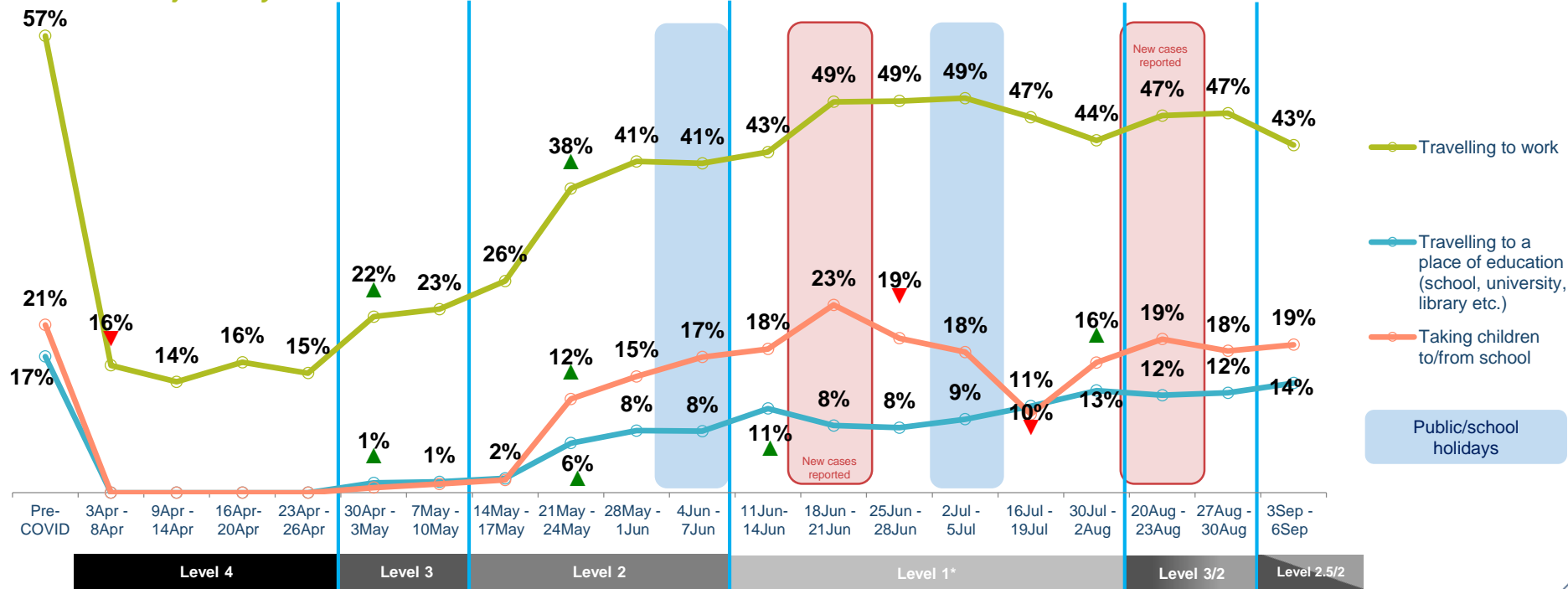
## Essential journeys – Auckland



QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Auckland in Benchmark: (n=3,759); Waves 1 – 19 (n=c.330 per wave)

# Outside of Auckland, most journey types have been relatively resilient, and have not changed significantly since the end of July

## Essential journeys – rest of New Zealand

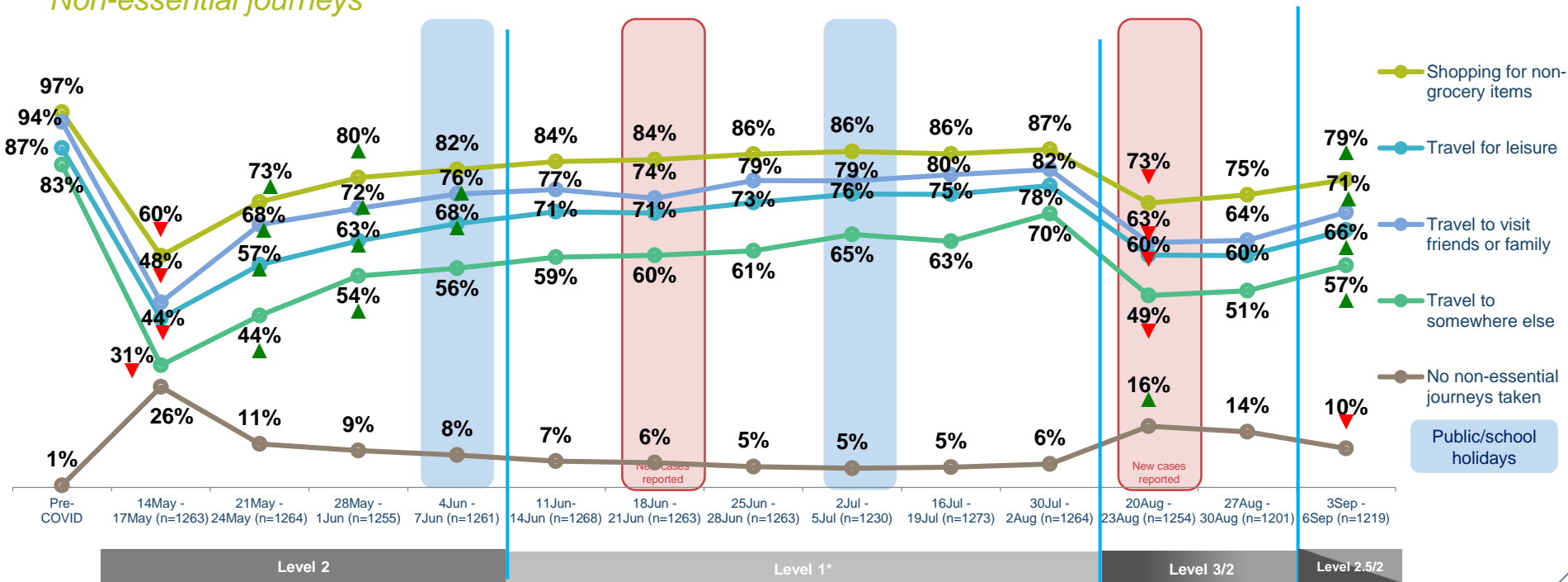


QJOURNEY1/QJOURNEY. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults rest of NZ 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 19 (n= between 1,230 – 1,300)



# For the first time since new community transmission cases were reported, the proportion reporting non-essential journeys has grown to a significant extent

## 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, level 1, level 3/2 and level 2.5/2 in New Zealand



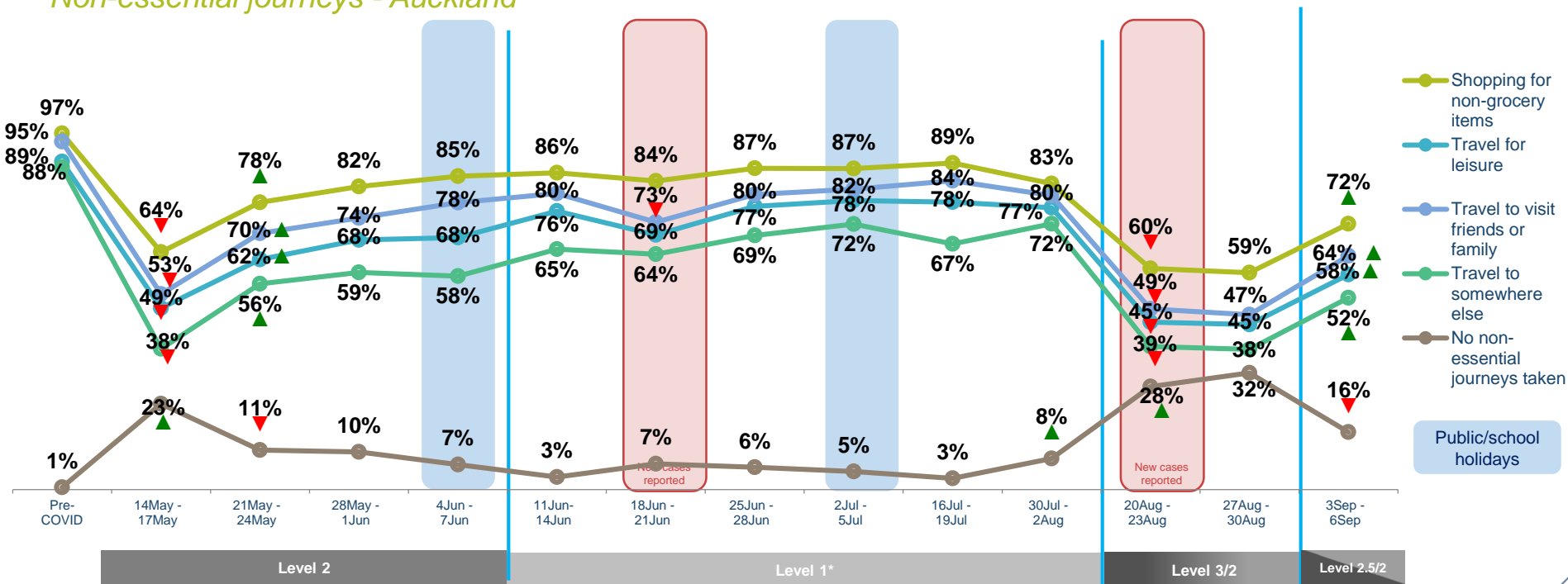
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# This change has been most concentrated in Auckland, where non-essential journeys were more significantly impacted at the start of the new lockdown

## Non-essential journeys - Auckland



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?

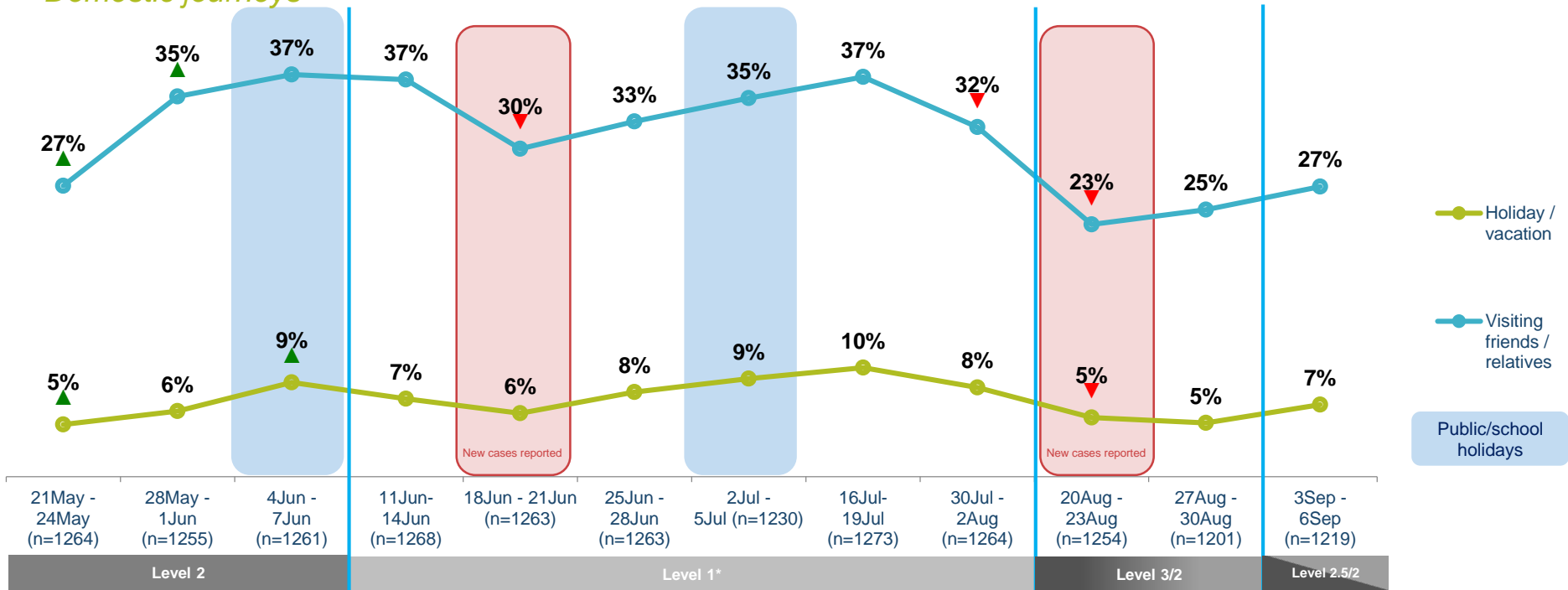
Base: all adults 15+ interviewed during level 2, level 1, level 3/2 and level 2.5/2 in Auckland





# Longer-distance inter-regional journeys appear to be taking longer to recover, but they are closer to incidences seen at the start of the May/June level 2 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?



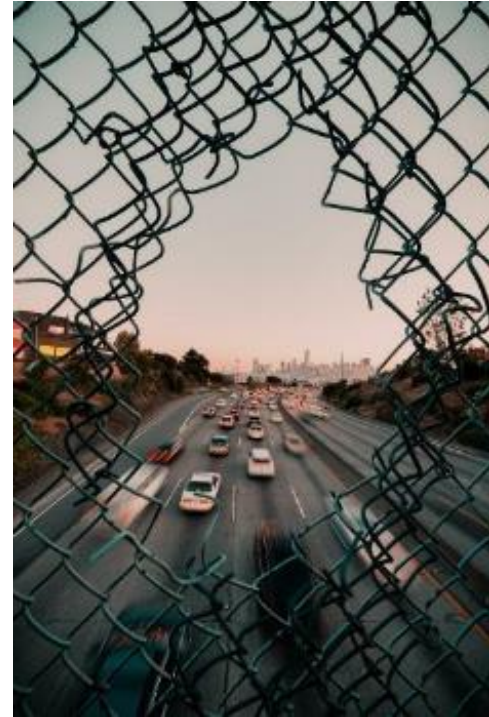


## Section 5 – Modal changes

# Key findings – modal changes

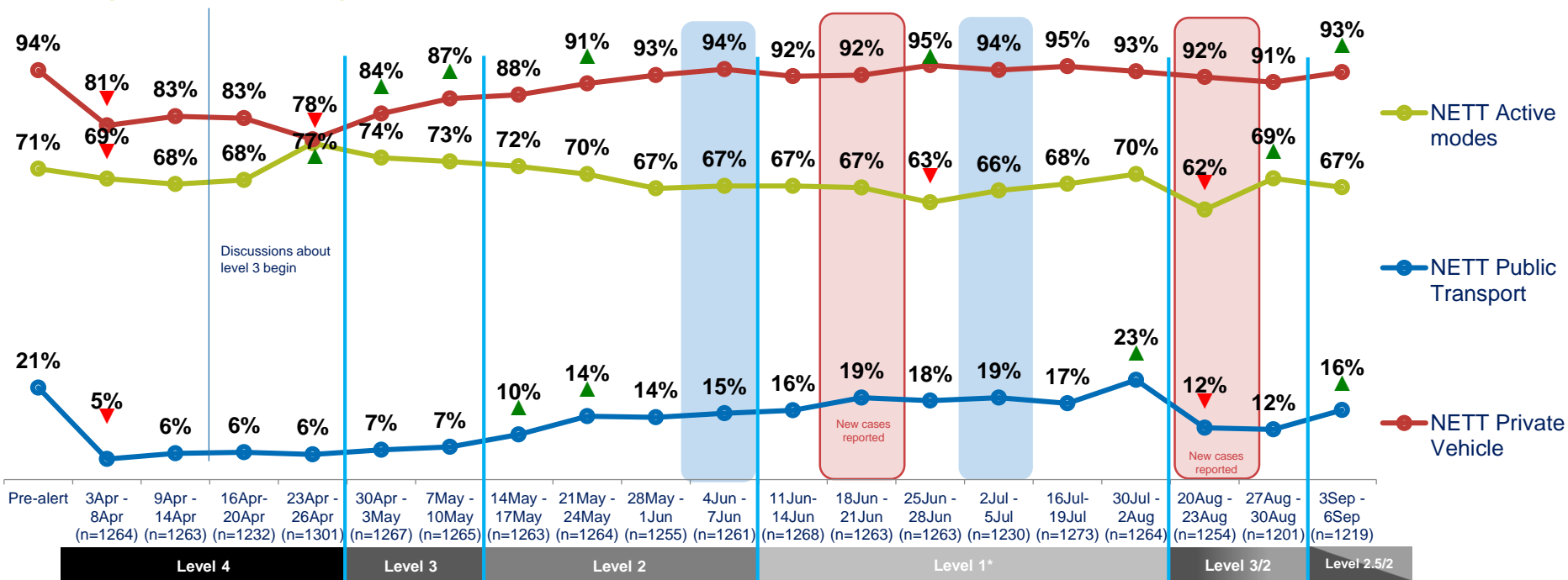
## Waka Kotahi objective – how and why is travel changing?

- 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.
- As with journeys, the change in alert level within Auckland has meant a more pronounced change in reported mode usage.
- Public transport is up nationally, driven by a statistically significant recovery of reported usage of all public transport modes within the Auckland region. Within Auckland, buses are the only public transport mode not to have returned to pre-lockdown reported usage levels.
- Outside of Auckland public transport usage has started to recover, but not to a statistically significant extent and all modes are still some way short of pre-lockdown reported usage.
- Both nationally and regionally, public transport consideration in wave 18 has acted as a relatively accurate lead indicator for public transport usage. This week, consideration has increased again, indicating that recovery is likely to continue.
- Among those still not travelling as much by public transport, transmission concerns continue to increase in salience, but this may be in part because those who previously would have reduced need are now returning to public transport as they need it for work and other purposes again.
- A small minority of those not travelling say that they would prefer not wear a mask on public transport. However, this is less than half the proportion who reduced their public transport usage out of concern that others may not wear masks.
- Among those who would normally use public transport, access to masks is high and continues to grow.



# Nationally, the proportion reporting at least one public transport journey during the past week has recovered to a statistically significant extent

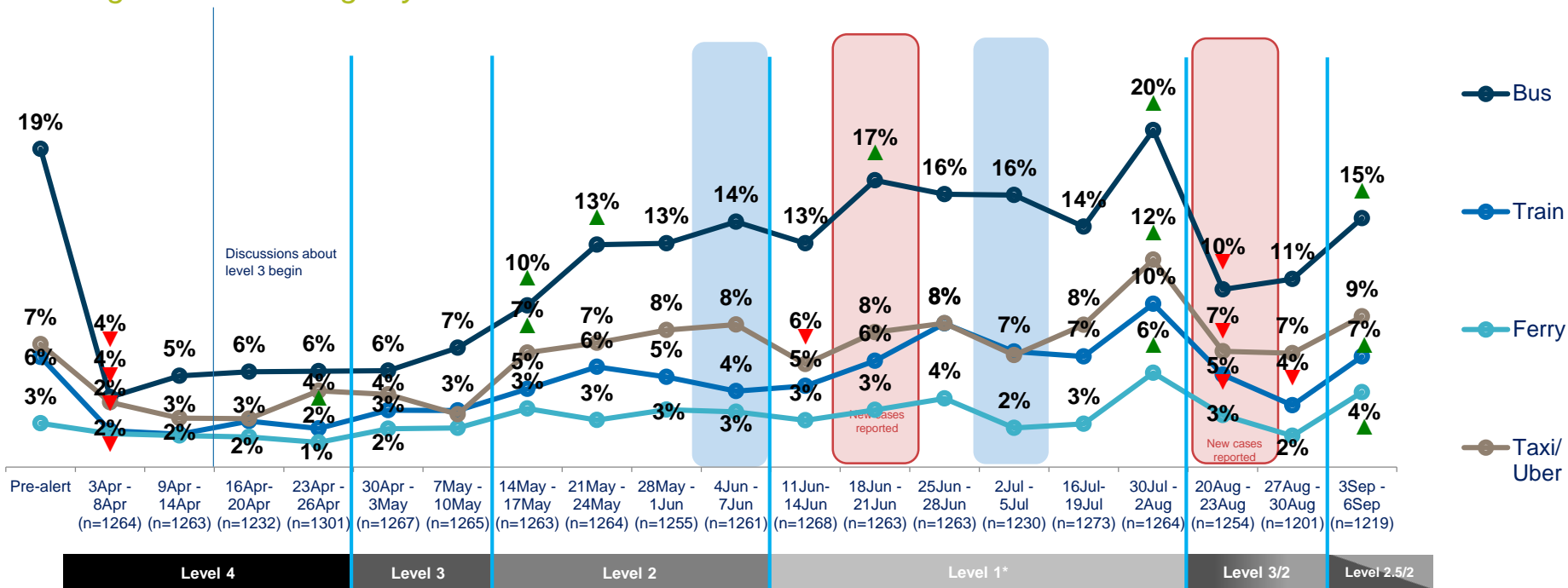
## Changes in mode usage by wave



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 (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in New Zealand

# Nationally, trains, buses and ferries have all seen statistically significant growth in reported weekly usage (used at least once)

## Changes in mode usage by wave

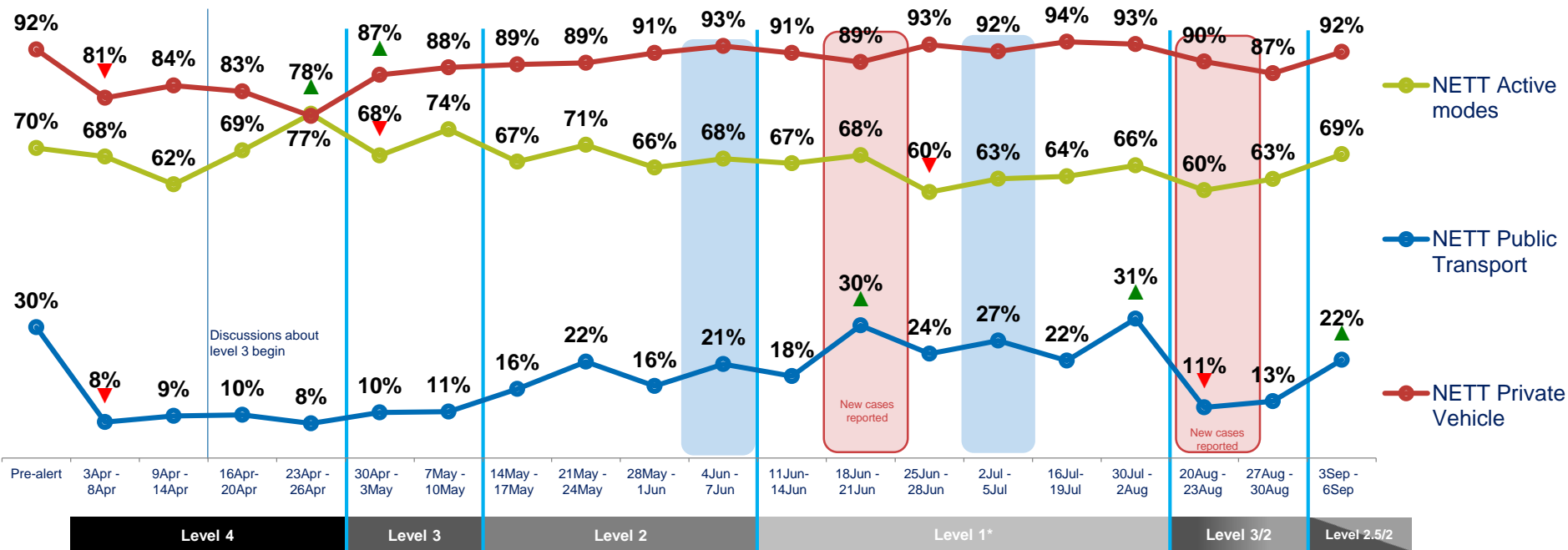


QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would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



# Reported public transport usage within Auckland grew the most during the past week, returning to rates seen during some weeks of level 1

## Changes in mode usage by wave, Auckland

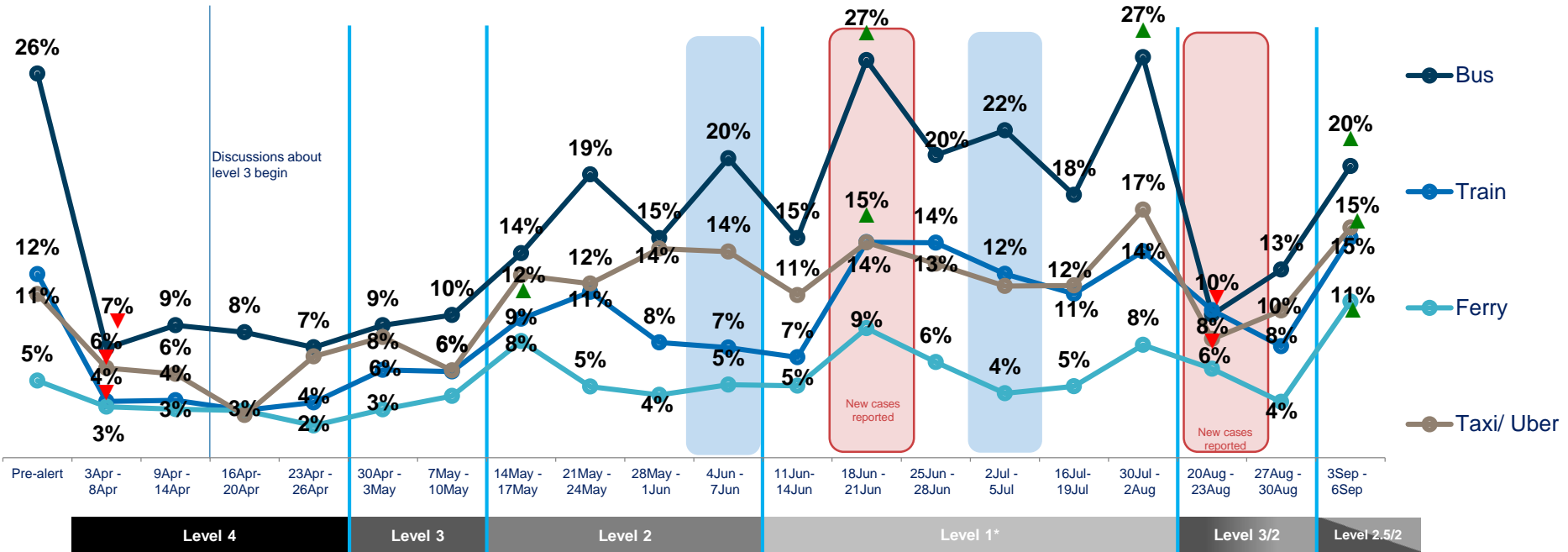


QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Auckland (n=c.330 per wave)



# All public transport and private hire usage was reported at a significantly higher rate in Auckland this wave

## Changes in mode usage by wave, Auckland

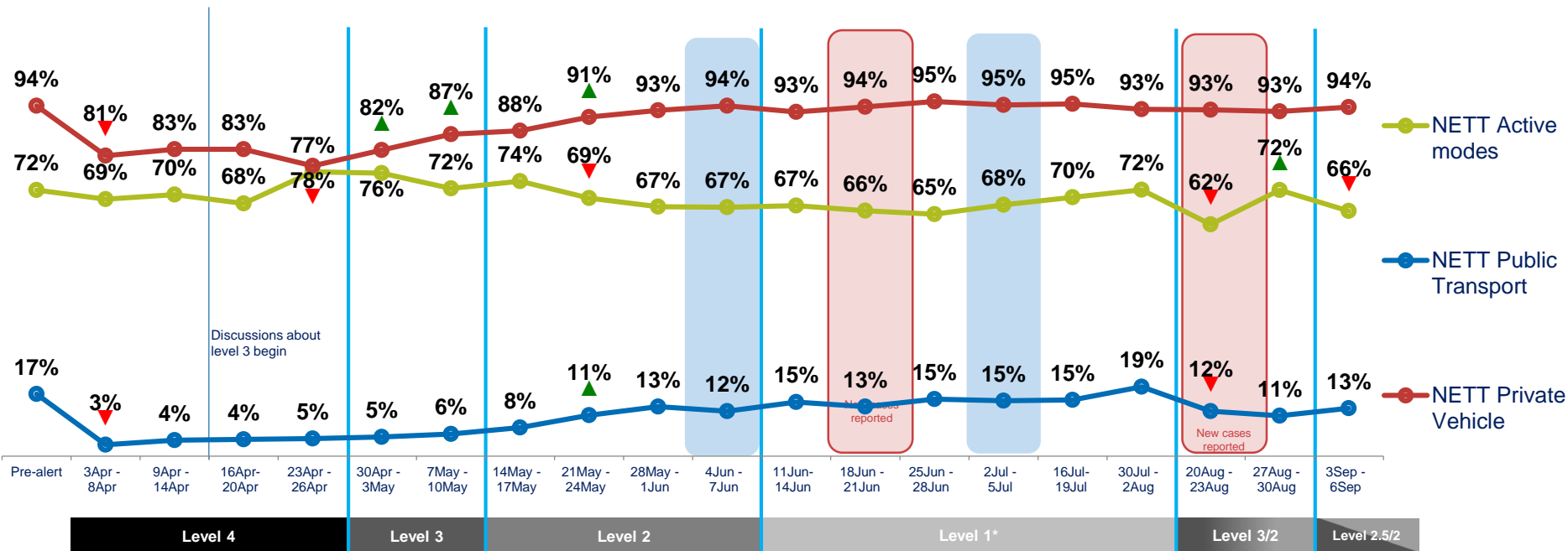


QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ in Auckland (n=c.330 per wave)



# Outside of Auckland, New Zealand hasn't seen a great deal of variation in reported modes of travel, with an exception in active modes, and in particular walking

## Changes in mode usage by wave, non-Auckland



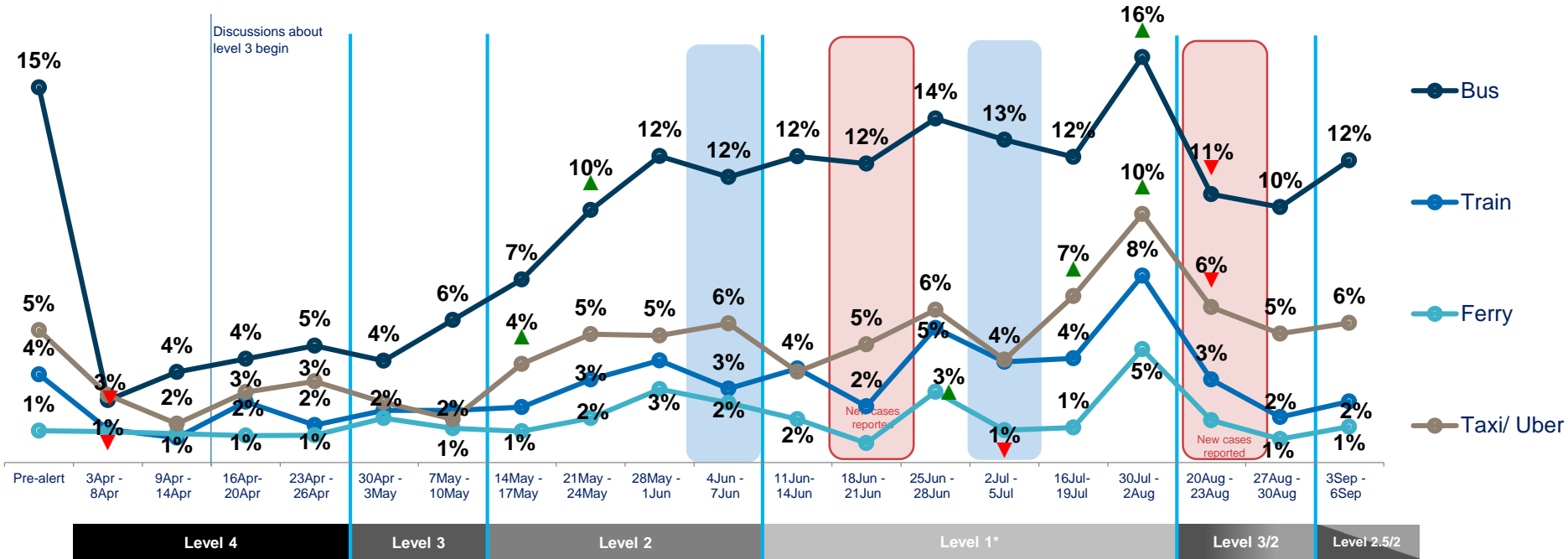
QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ not living in Auckland (n=c.900 per wave)





# Directionally, reported public transport usage began to recover for most modes, but not to a statistically significant extent

## Changes in mode usage by wave, non-Auckland

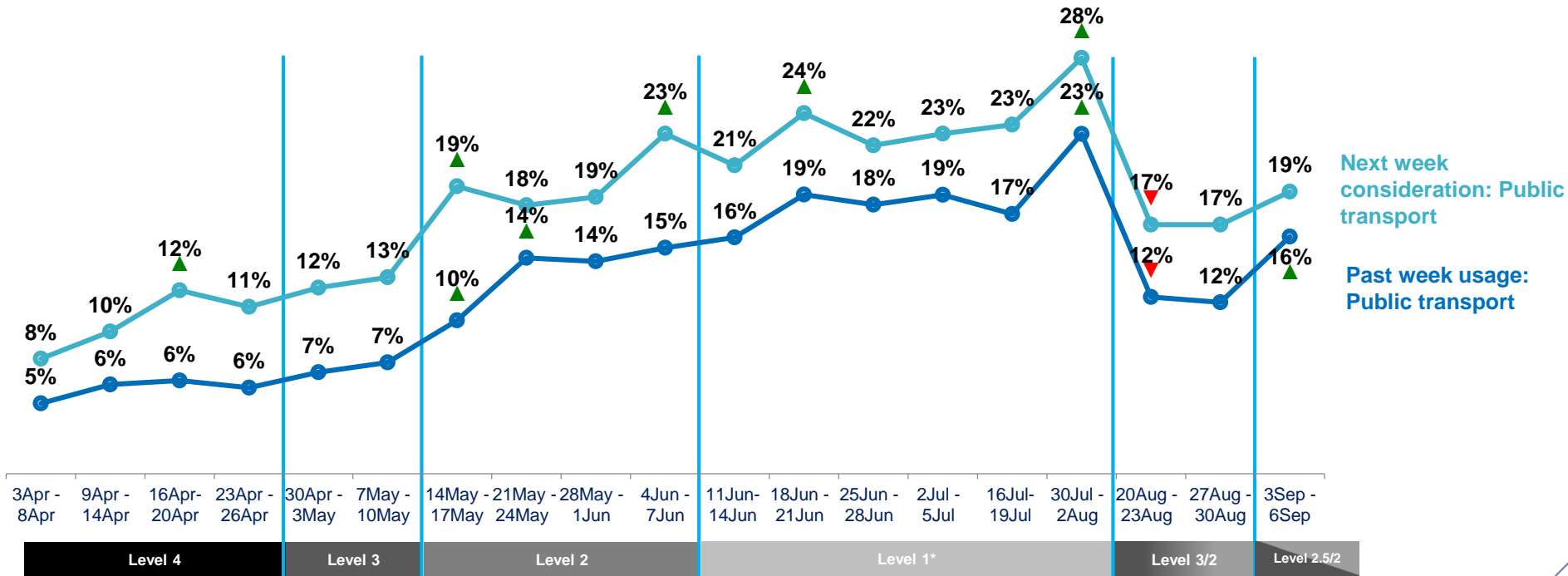


QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below? QJOURNEY1-2. Which, if any of the following types of journeys would you have made in a normal week (eg in February this year)? And which, if any of the following types of journeys did you make during the last seven days? Base: all adults 15+ not living in Auckland (n=c.900 per wave)



# Nationally, stated public transport usage is at a roughly equal rate to the proportion who said they would consider it in the previous wave

## 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



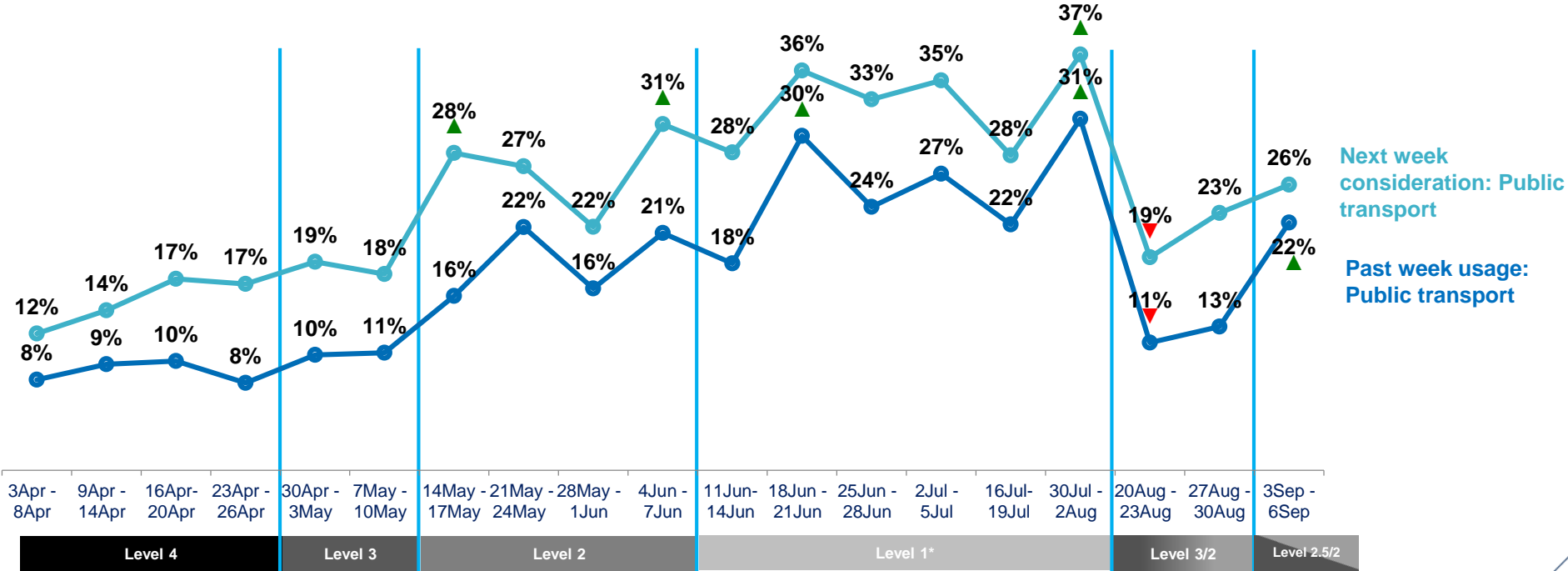
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

This is also the case within Auckland, where public transport usage is just 1 point short of consideration seen in wave 18

*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



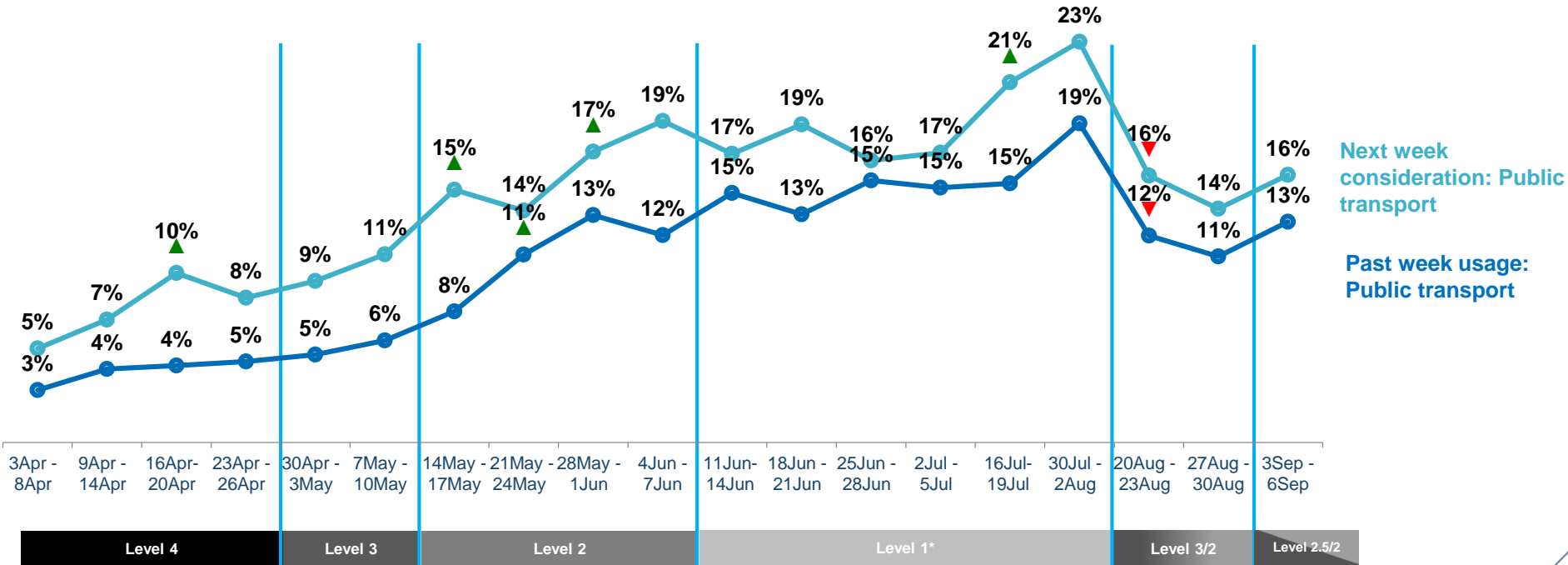
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Outside of Auckland, this pattern has held, with usage just 1 point short of consideration in the preceding week

## 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

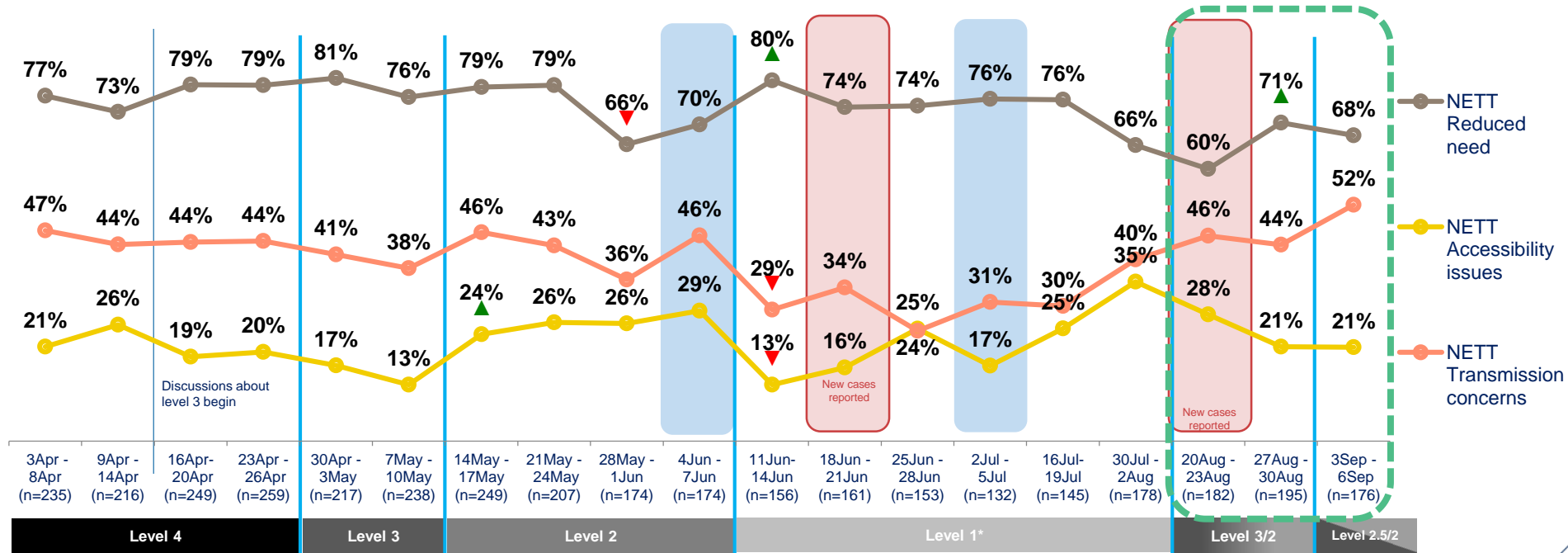


Indicates a statistically significant decrease from previous time period

# Transmission concerns have continued to grow during the most recent wave, with 6% staying away because they don't want to wear masks

## Reasons for decrease in PT activity

Not enough people are wearing masks on public transport – 15%  
I don't want to have to wear a mask on public transport – 6%



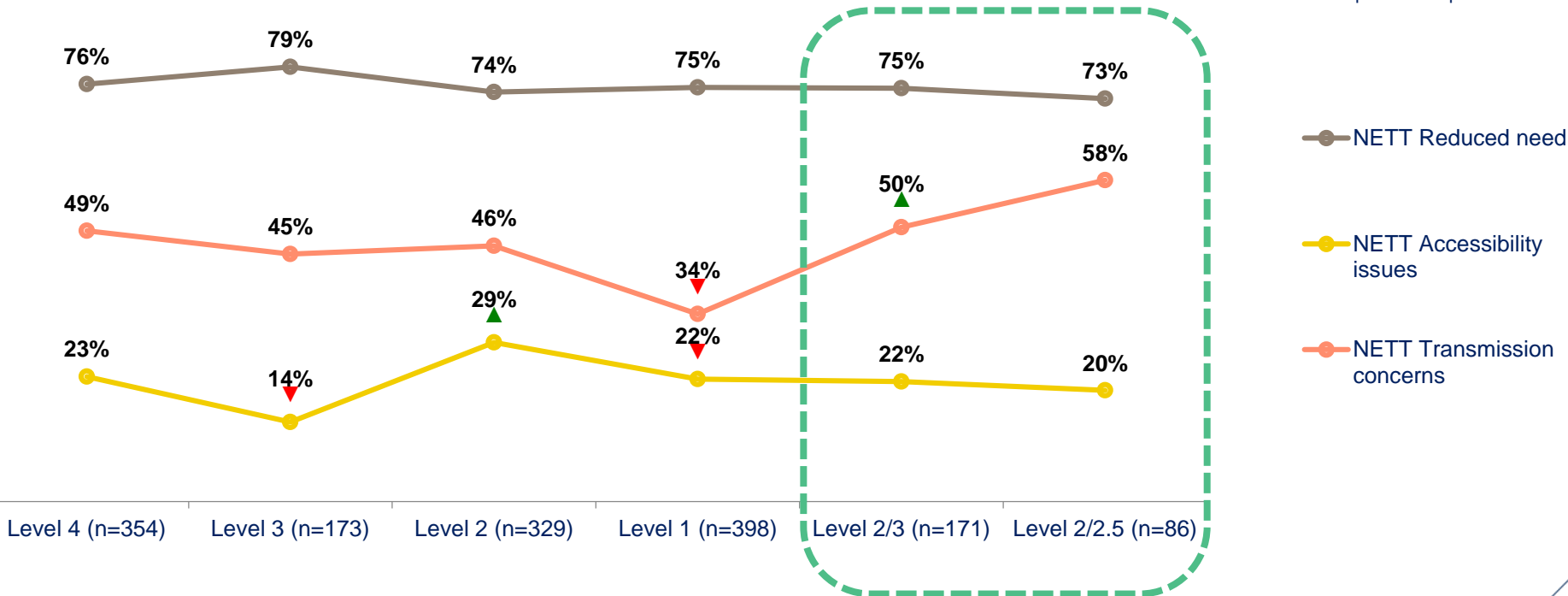
For which, if any of the following reasons, has your use of public transport decreased?

Base: decreasing PT usage in past week

# Transmission concerns are the only barrier to have grown in Auckland during the new lockdown, whilst compulsory masks are cited less here

## Reasons for decrease in PT activity - Auckland

Not enough people are wearing masks on public transport – 13%  
I don't want to have to wear a mask on public transport – 4%



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

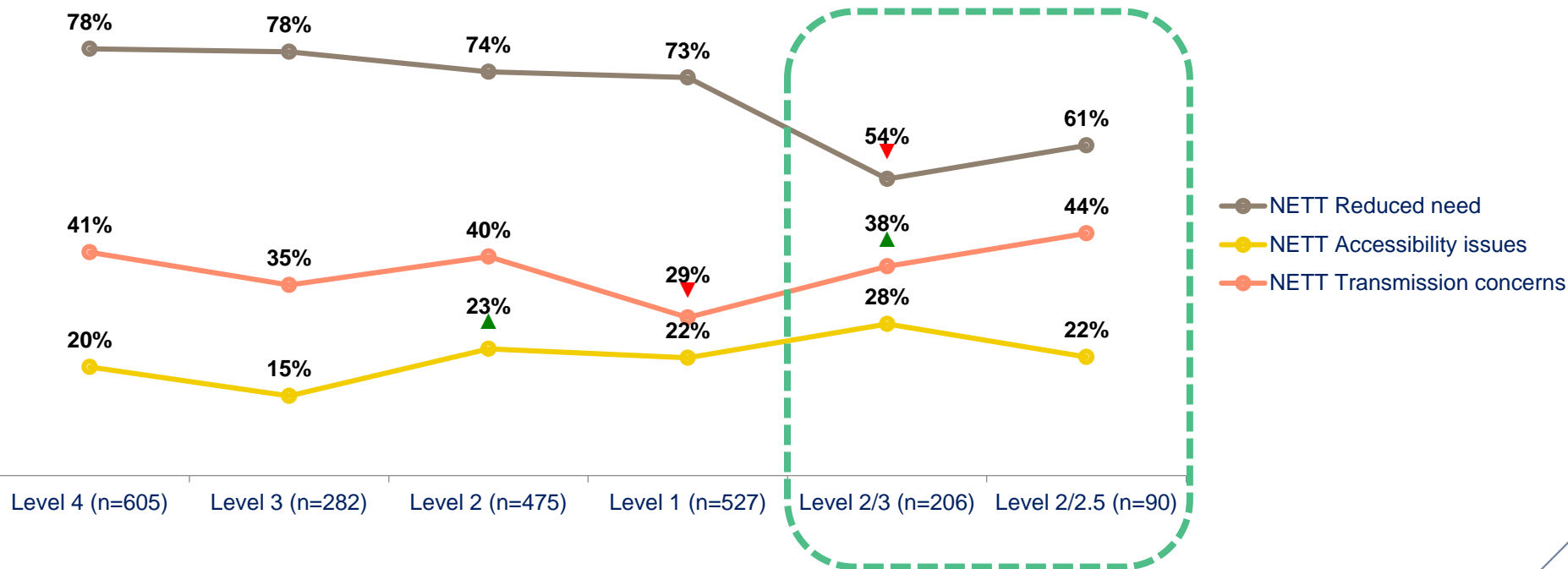
Base: decreasing PT usage in past week



# All types of mask concern are more prominent outside of Auckland

## Reasons for decrease in PT activity – non-Auckland

Not enough people are wearing masks on public transport – 17%  
I don't want to have to wear a mask on public transport – 9%



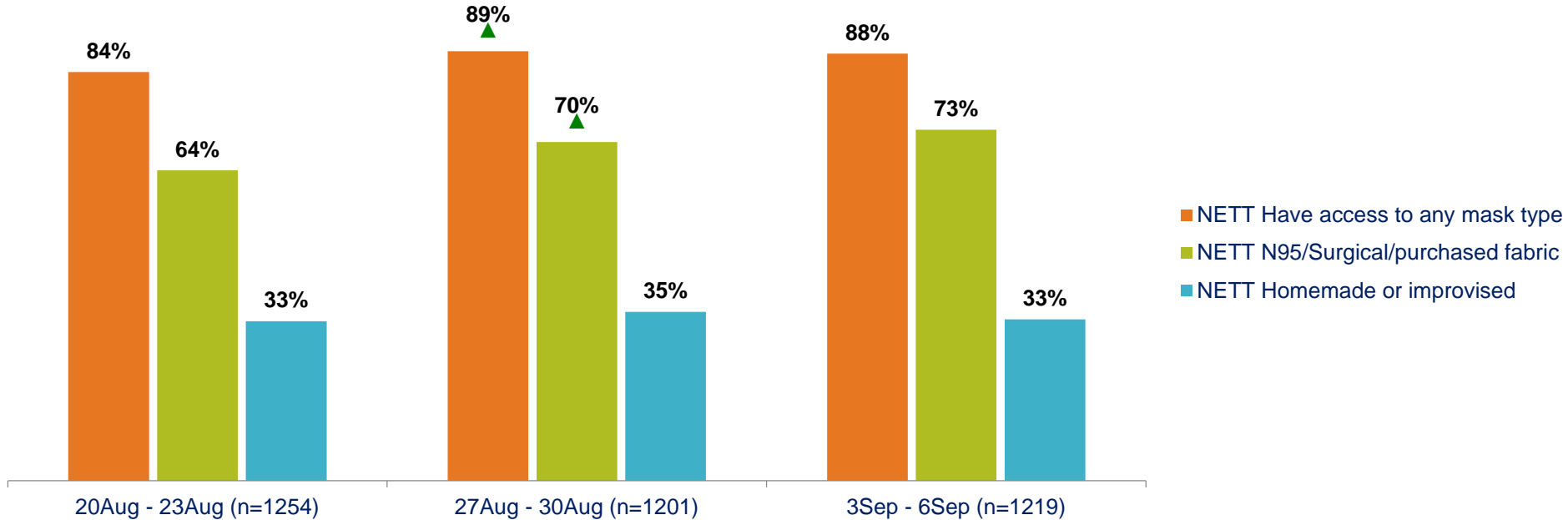
For which, if any of the following reasons, has your use of public transport decreased?

Base: decreasing PT usage in past week



# Reported access to purchased mask types has continued to grow directionally since the start of the new lockdown

## 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

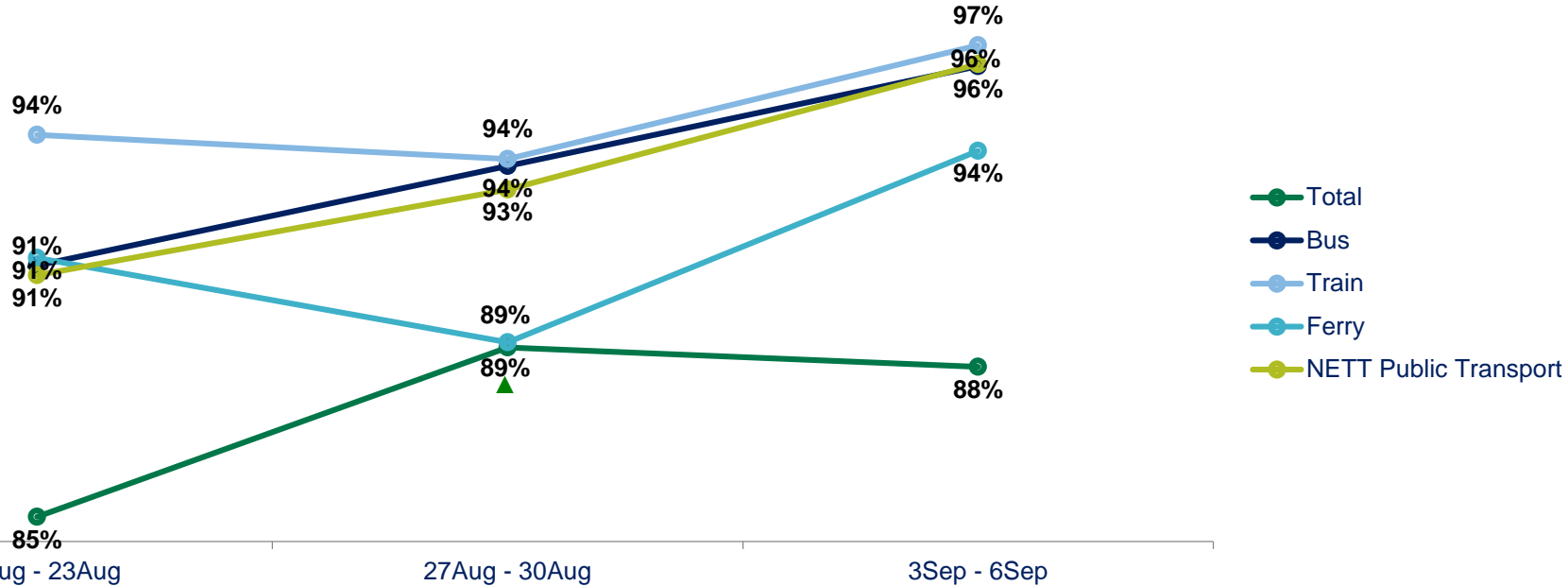


Indicates a statistically significant decrease against previous waves



# Reported mask access has also continued to grow among those who would normally travel by public transport and these groups over-index versus the general population

## Access to masks by wave



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

The background image is a composite of two scenes. The left side shows a hiker in a dark jacket and hat, carrying a large pack, walking on a path. The right side shows two cyclists riding on a paved path through a wooded area. One cyclist in the foreground is wearing a red jacket and a white helmet, while another cyclist in a dark jersey is behind him. The scene is brightly lit, suggesting a sunny day.

## Section 6 – Going forward with domestic tourism

# Key findings – going forward with domestic tourism

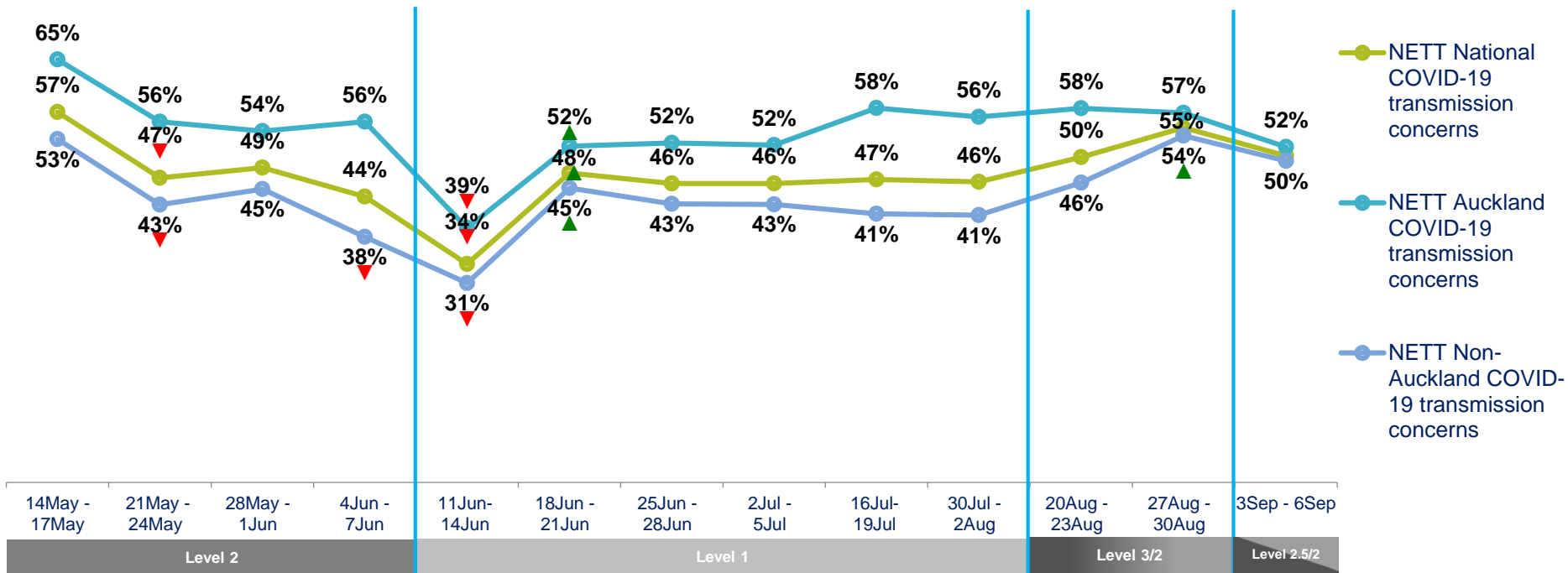
## Waka Kotahi objective – how will domestic tourism change going forward?

- New Zealand has opened up internally to domestic travel whilst 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.
- Medium to long-term intention to travel for tourism purposes has remained stable during the second lockdown as has expectation of travel frequency and volume during the coming spring and summer.
- During the beginning of this new lockdown period, concerns about COVID-19 transmission increased as a reason cited for expecting to travel less, but this has directionally declined during the most recent wave.
- Expected travel disruptions due to COVID-19 also increased early on but have continued to grow in saliency, particularly for Aucklanders, even with the relaxing of lockdown restrictions in this region.



# Long term intention to travel for tourism purposes has not changed notably, but in all regions there has been a directional decline in transmission concerns as a barrier

## Reasons for travelling less – transmission concerns

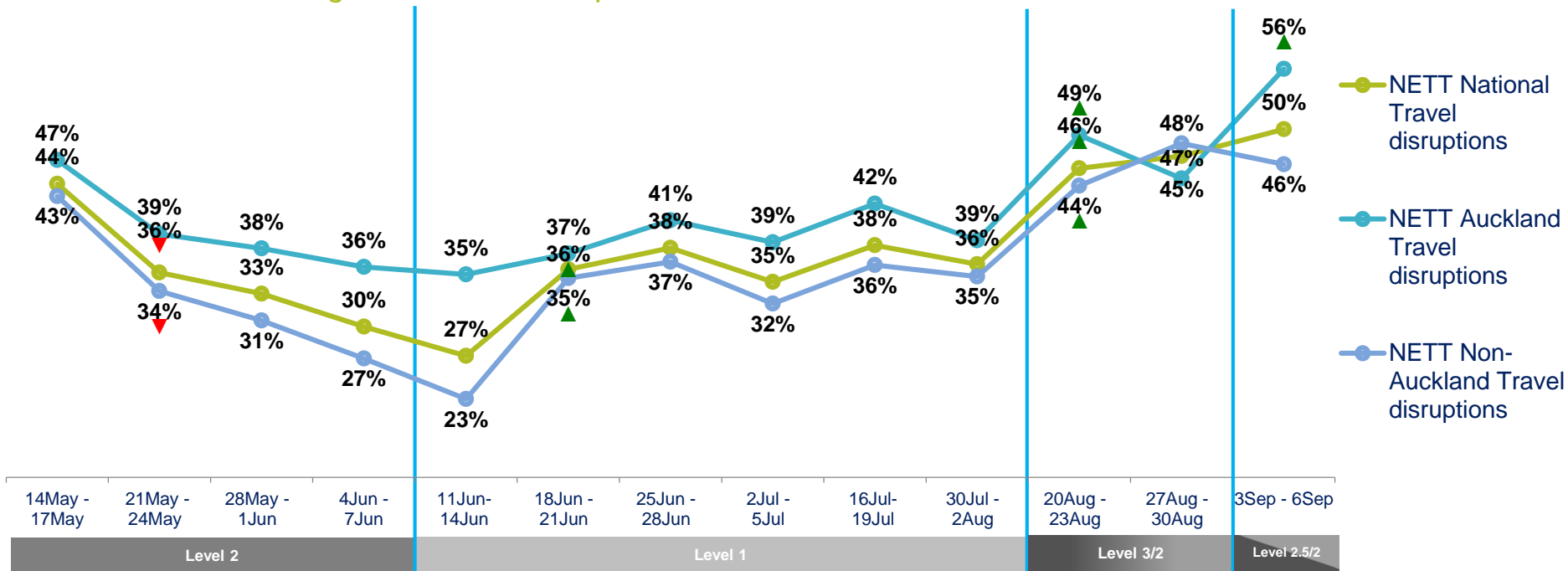


FDT3A. What are the main reasons that you intend to travel less?  
 Base: all adults 15+ in New Zealand who intend to travel less



# Comparatively, there has been significant growth in expected travel disruptions as a barrier for Aucklanders and this concern is now highest it has ever been

## 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 7 – Working from home

# Key findings – working from home

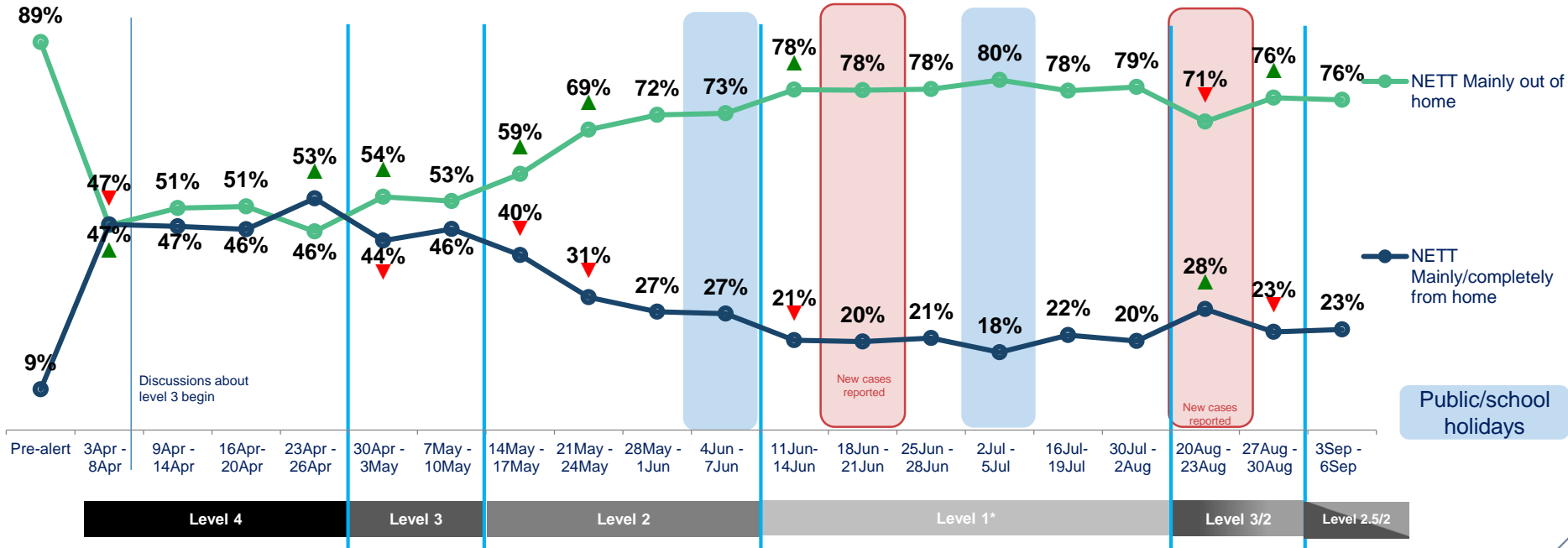
## Waka Kotahi objective – understanding behaviour change

- Commuter traffic makes up a large proportion of the impact on transport infrastructure. As alert levels decrease and restrictions are relaxed, it's important to understand who will return to work travel and how, and who will continue to be absent from the commuter population.
- The proportion working from home in Auckland under the first week of the relaxed level 2.5 lockdown has not decreased significantly again. Comparatively, working from home dropped sharply before alert levels changed.
- This has resulted in a stable national picture in terms of the proportion working from home, which is only a little higher than it was during level 1.
- Even though private vehicle commuters make up a greater proportion of the working from home population, public transport is still dis-proportionately impacted, with a greater share of this commuter type now working from home.



# Nationally, the proportion working from home has stabilised

## 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?

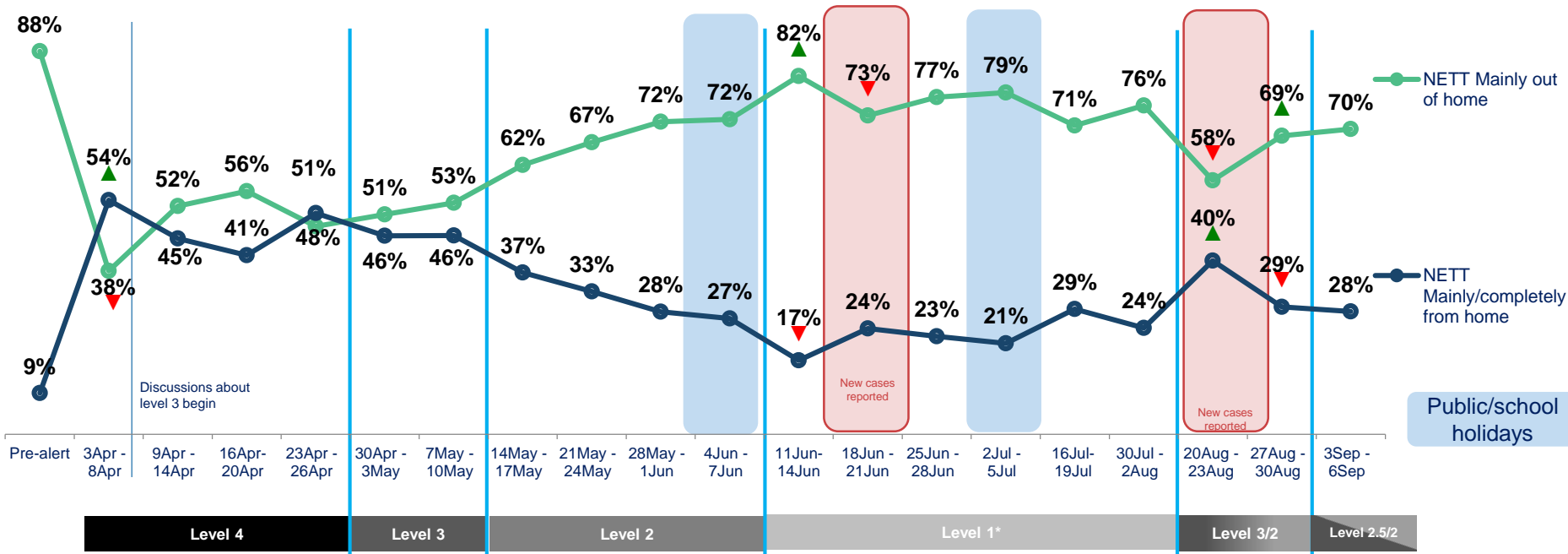
Base: all adults 15+ in New Zealand usually working





Within Auckland, the change in alert level has not seen a significant increase in return to normal workplaces, but this occurred at a larger scale the preceding week

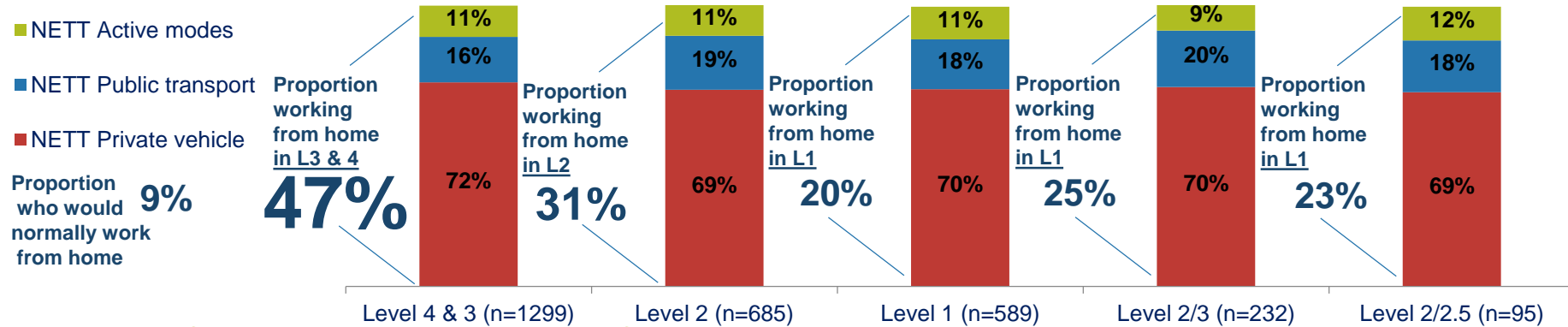
*Proportion working in and out of home by survey wave – Auckland*



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

# Public transport commuting is still much more impacted by people working from home, with nearly two in five public transport commuters working from home

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



## Proportion of each commuter type working from home

Proportion WFH by level	47%	31%	20%	25%	23%
Within active mode commuters	53%	31% ▼	17% ▼	19%	19%
Within private vehicle commuters	43%	25% ▼	13% ▼	18% ▲	15%
Within public transport commuters	62%	42% ▼	24% ▼	38% ▲	39%

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





## Section 8 – Access to commerce

# Key findings – access to commerce

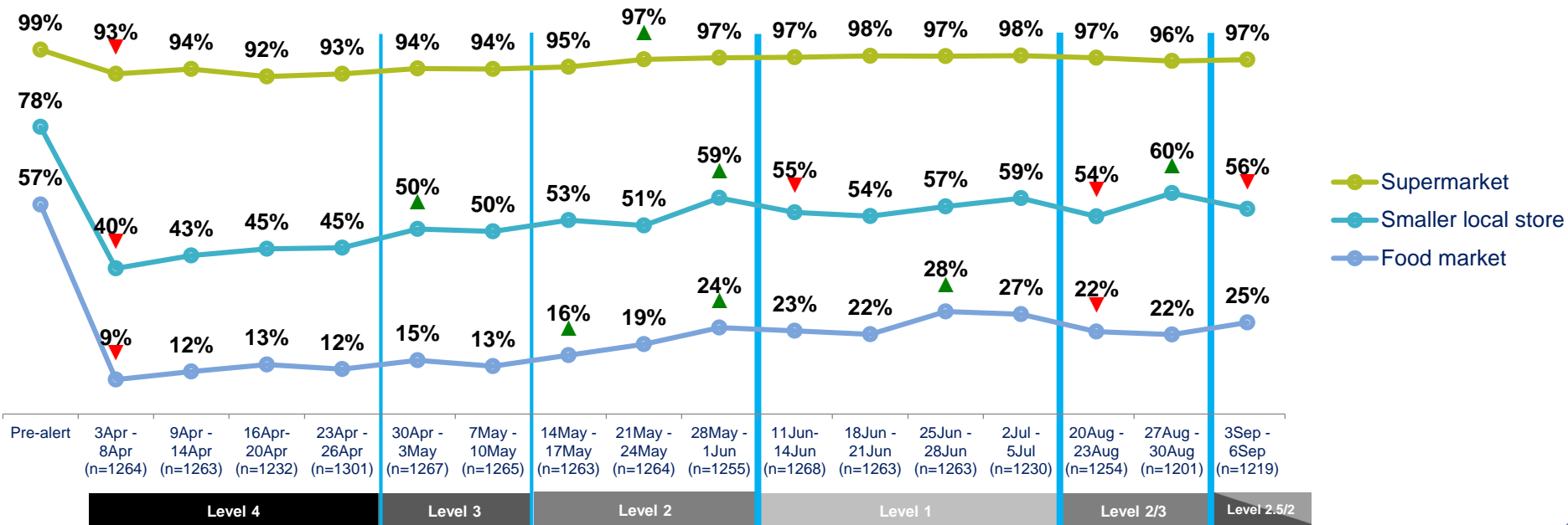
## Waka Kotahi objective – understanding behaviour change

- 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, the statistically significant increase in online grocery shopping during recent lockdown weeks has plateaued as movement restrictions in the region are relaxed.
- It remains to be seen whether this will return to where it was in February, or whether there will be a 'new normal' within the region and nationally with regards to the popularity and pervasiveness of online channels.



# Nationally, physical store shopping has been relatively stable through the most recent lockdown

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

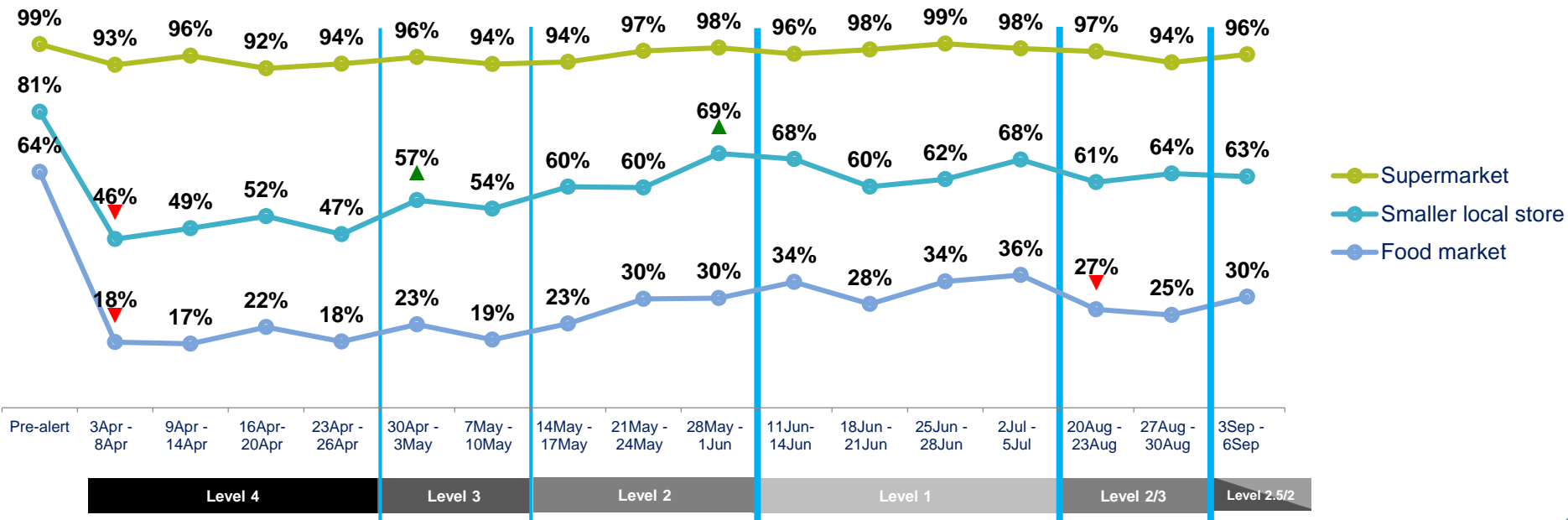


QSH1/SH2 On how many days per week, if at all, did your household normally shop in February 2020 for groceries and household essentials in each of the following ways? And how often, if at all, has your household shopped for groceries and household essentials in each of the following ways during the past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

Base: all adults who ever grocery shop in New Zealand

This has also been the case in Auckland, where no physical store has seen any further drop off in weekly users, with a directional increase in food market usage

*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 Auckland (c.330 per wave)



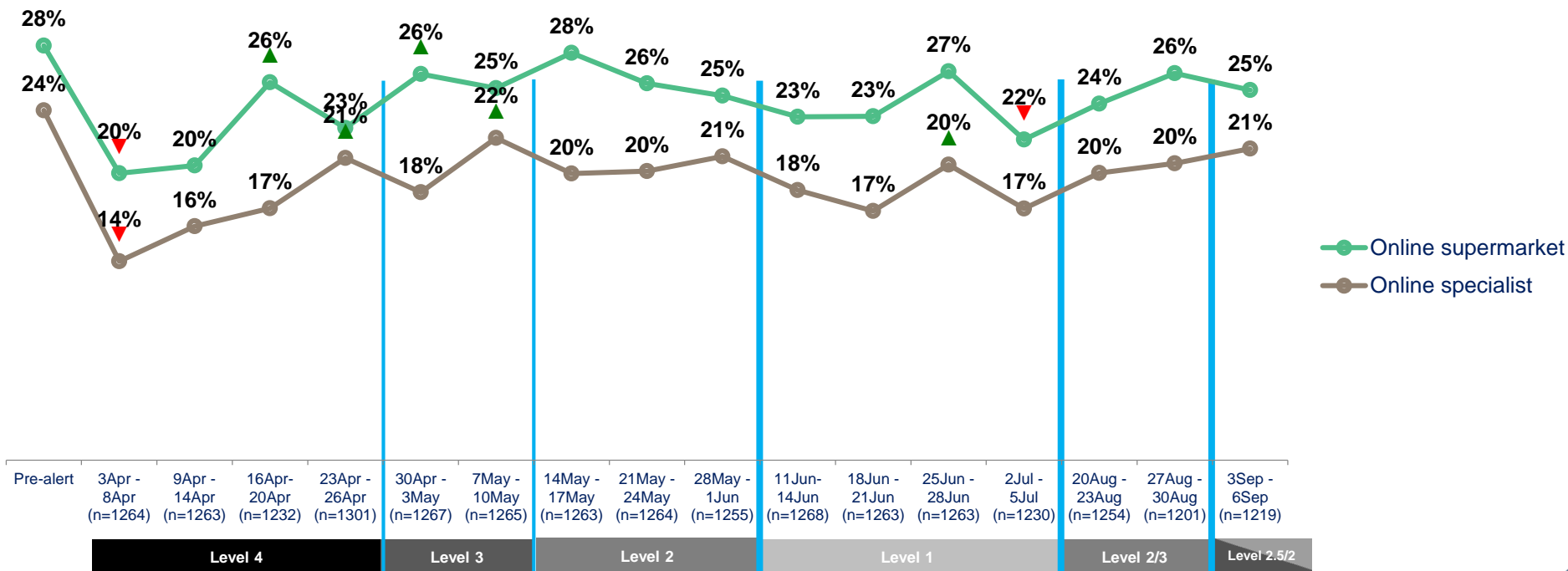
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# Nationally, online shopping has grown directionally during the latest lockdown

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



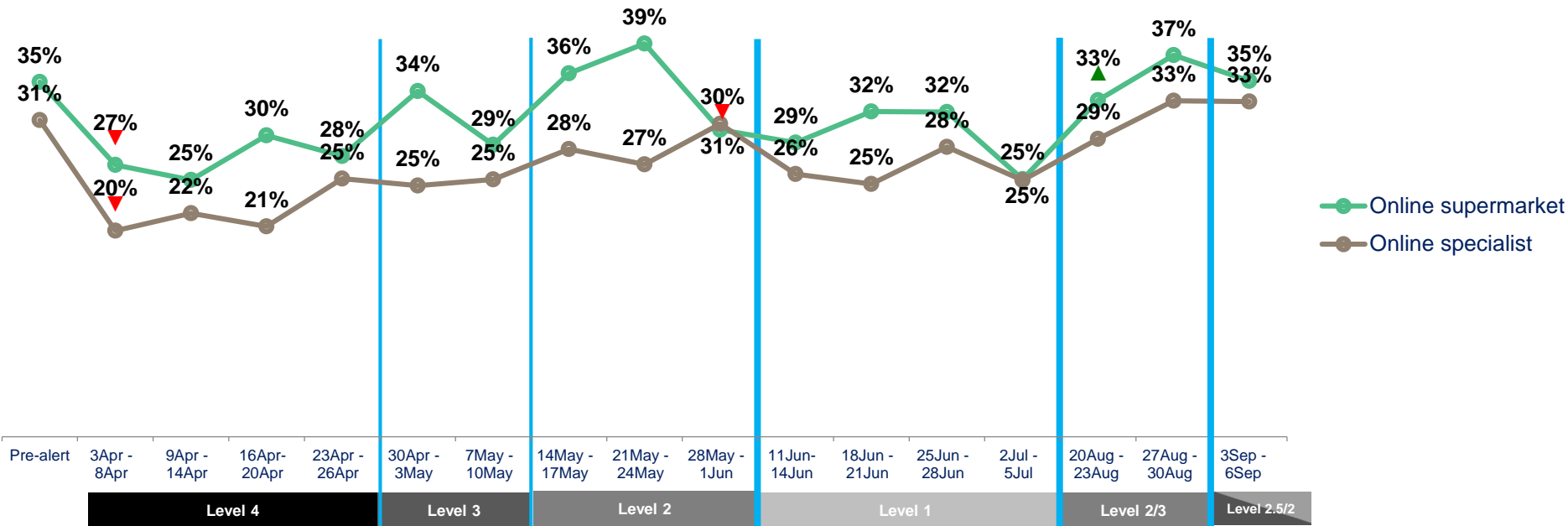
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

# The growth in online shopping has been chiefly driven by growth in Auckland and this has not yet fallen away following the change in local alert level

*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 Auckland (c.330 per wave)



