Waka Kotahi COVID-19 transport impact

Fieldwork waves 1-28 core report

14 June 2022

WAKA KOTAHI
NZ TRANSPORT AGENCY

New Zealand Government

Disclaimer

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

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

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

Report content

COVID-19 transport impact

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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.

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

1) Regular* overview power point report
   - benchmark and longitudinal summary of key data points
   - including extra analysis based on topical questions.

2) Open Data tables
   - Downloaded crosstabs of key variables in excel format, accompanied by survey technical report and questionnaire changes tracking log, downloadable from Waka Kotahi Open Data portal

*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. Waves 17, 18, 19, 20 and 21 are weekly. Wave 22 took place 3 weeks after wave 21. Waves 23-28 have occurred on an ad hoc basis.

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, mask ownership, etc.

Report notes (i)

Key information to note for this report

- This report is based on 28 waves of fieldwork, see table ►
- The sample for this report is presented in a number of ways, including as a combined sum of fieldwork for specific alert levels, 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 2020.
- At a total population level, significance testing indicated in this wave 28 report is based on a statistically significant shift of results between waves 1 to 28, as well as statistically significant shifts between combined alert levels.
- 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.

*Please note: During the fieldwork period, on 7 March AKL dropped to Alert Level 2 and the rest of New Zealand moved to Alert Level 1.
**Please note: Northland was also under Level 4 for much of the week preceding fieldwork, dropping to Level 3 at midnight on day of launch.

Wave	Dates of fieldwork	Alert level
1	Friday 3 April to Wednesday 8 April	Alert level 4
2	Thursday 9 April to Tuesday 14 April	
3	Thursday 16 April to Monday 20 April	
4	Thursday 23 April to Sunday 26 April	
5	Thursday 30 April to Sunday 3 May	Alert level 3
6	Thursday 7 May to Sunday 10 May	
7	Thursday 14 May to Sunday 17 May	Alert level 2
8	Thursday 21 May to Sunday 24 May	
9	Thursday 28 May to Monday 1 June	
10	Thursday 4 June to Sunday 7 June	
11	Thursday 11 June to Sunday 14 June	Alert level 1
12	Thursday 18 June to Sunday 21 June	
13	Thursday 25 June to Sunday 28 June	
14	Thursday 2 July to Sunday 5 July	
15	Thursday 16 July to Sunday 19 July	
16	Thursday 30 July to Sunday 2 August	
17	Thursday 20 August to Sunday 23 August	Alert Level 3 (AKL) Alert level 2 (Rest of NZ)
18	Thursday 27 August to Sunday 30 August	
19	Thursday 3 September to Sunday 6 September	Alert Level 2.5 (AKL) Alert level 2 (Rest of NZ)
20	Thursday 17 September to Sunday 20 September	
21	Thursday 24 September to Sunday 27 September	Alert level 2 (AKL) Alert level 1 (Rest of NZ)
22	Thursday 15 October to Sunday 18 October	Alert level 1
23	Thursday 12 November to Sunday 15 November	
24	Thursday 4 March to Monday 8 March*	Alert Level 3 (AKL) / Alert Level 2 (Rest of NZ)
25	Thursday 20 May to Monday 24 May	Alert level 1
26	Thursday 2 September to Monday 6 September**	Alert Level 4 (AKL) / Alert Level 3 (Rest of NZ)
27	Thursday 10 March to Monday 14 March 2022	Covid Protection Framework, Red light, phase 2
28	Thursday 26 May to Tuesday 31 May	Covid Protection Framework, Orange

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

Wave	Display variable	Total	Region of residence							Disability, Vulnerability and COVID-19**		
			Auckland	Tauranga	Hamilton	Wellington	Christchurch	Dunedin	Rest of NZ	Any Disability	COVID-19 Vulnerable	Aged 70 + years
			All in Auckland Region, including city and surrounding rural areas	All living in the city of Tauranga	All living in the city of Hamilton	All in Wellington Region, including city and surrounding rural areas	All living in the city of Christchurch	All living in the city of Dunedin	All living in areas outside of those noted above	See previous page	See previous page	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over
Waves 1-4	Sample	n= 5,060	n=1,324	n=400	n=400	n=684	n=400	n=398	n=1,454	n=550	n=1,230	n=618
	MoE*	1.38	2.69	4.9	4.9	3.75	4.9	4.91	2.57	4.18	2.79	3.94
Waves 5-6	Sample	n=2,532	n=662	n=200	n=200	n=418	n=200	n=200	n=652	n=297	n=597	n=315
	MoE*	1.95	3.81	6.93	6.93	4.79	6.93	6.93	3.84	5.69	4.01	5.52
Waves 7-10	Sample	n= 5,043	n=1,324	n=400	n=400	n=799	n=400	n=392	n=1,328	n=611	n=1,139	n=627
	MoE*	1.38	2.69	4.9	4.9	3.47	4.9	4.95	2.69	3.96	2.9	3.91
Waves 11-16	Sample	n= 7,561	n=1,964	n=599	n=600	n=1,129	n=601	n=607	n=2,061	n=866	n=1,640	n=830
	MoE*	1.13	2.21	4	4	2.92	4	3.98	2.16	3.33	2.42	3.4
Waves 17-18	Sample	n= 2,455	n=661	n=200	n=200	n=311	n=200	n=200	n=683	n=284	n=584	n=266
	MOE*	1.98	3.81	6.93	6.93	5.56	6.93	6.93	3.75	5.82	4.06	6.01
Waves 19-20	Sample	n= 2,626	n=676	n=197	n=217	n=357	n=200	n=208	n=771	n=323	n=617	n=293
	MOE*	1.91	3.77	6.98	6.65	5.19	6.93	6.79	3.53	5.45	3.95	5.73
Wave 21	Sample	n= 1,253	n=331	n=100	n=100	n=175	n=100	n=87	n=360	n=132	n=317	n=162
	MOE*	2.77	5.39	9.8	9.8	7.41	9.8	10.51	5.16	8.53	5.5	7.7
Wave 22	Sample	n=1,220	n=331	n=97	n=101	n=156	n=100	n=93	n=342	n=130	n=299	n=131
	MOE*	2.81	5.39	9.95	9.75	7.85	9.8	10.16	5.3	8.6	5.67	8.56
Wave 23	Sample	n=1,247	n=331	n=86	n=100	n=165	n=100	n=100	n=365	n=142	n=305	n=141
	MOE*	2.77	5.39	10.57	9.8	7.63	9.8	9.8	5.13	8.22	5.61	8.25
Wave 24	Sample	n=1,232	n=331	n=67	n=100	n=161	n=100	n=100	n=373	n=142	n=297	n=160
	MOE*	2.79	5.39	11.97	9.8	7.72	9.8	9.8	5.07	8.22	5.69	7.75
Wave 25	Sample	n=1,259	n=331	n=100	n=100	n=194	n=100	n=100	n=334	n=187	n=311	n=133
	MOE*	2.76	5.56	9.8	9.8	7.04	9.8	9.8	5.36	7.17	5.56	8.5
Wave 26	Sample	n=1,261	n=331	n=100	n=100	n=164	n=100	n=100	n=336	n=133	n=324	n=159
	MOE*	2.76	5.39	9.8	9.8	7.65	9.8	9.8	9.8	8.5	5.44	7.77
Wave 27	Sample	n=1,181	n=331	n=68	n=95	n=117	n=100	n=95	n=375	n=140	n=299	n=144
	MOE*	2.85	5.39	11.88	10.05	9.06	9.8	10.05	5.06	8.28	5.67	8.17
Wave 28	Sample	n=1,223	n=329	n=83	n=100	n=165	n=101	n=83	n=362	n=164	n=303	n=186
	MOE*	2.80	5.4	10.76	9.8	7.63	9.75	10.76	5.15	7.65	5.63	7.19

*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 - 2020

3 February
Travellers leaving from China denied entry to NZ unless they are NZ citizens or permanent residents

28 February
New Zealand confirms its first COVID-19 case
Travel restrictions introduced for those coming from Iran

14 March
Announcement that all travellers arriving in NZ must self-isolate for 14 days upon arrival

16 March
Public gatherings of more than 500 people banned

19 March
New Zealand bans all non-residents from entering the country
Indoor events of more than 100 people now banned

21 March
PM Jacinda Ardern announces a four level, country-wide alert system
New Zealand at alert level 2

23 March
NZ upgraded to level 3, public notified this would be raised to level 4 at 11:59pm, 25 March.
Non-essential services required to close in 48 hours

24 March All public transport to be free during lockdown period

25 March
New Zealand upgraded to level 4, resulting in a nationwide lockdown

3 April Waka Kotahi COVID-19 impact tracker fieldwork begins

20 April
PM Jacinda Ardern announces NZ will move to level 3 at 11:59pm, 27 April, remaining there for at least two weeks

27 April
New Zealand moved to alert level 3 at 11:59pm

4 May
First day where no new COVID-19 cases are recorded in NZ

11 May
PM Jacinda Arden announces that New Zealand will move to level 2 at 11:59pm, 13 May, with schools to open Monday 18 May and bars Thursday 21 May.

13 May
New Zealand moved to alert level 2 at 11:59pm

18 May & 21 May
All schools open to students on Monday and bars allowed to open Thursday

8 June - **New Zealand moved to alert level 1 at 11:59pm**

16 June
Two new COVID-19 cases are confirmed after 24 days with no new cases, followed by more new cases.

25 June
12 active COVID-19 cases are confirmed in NZ, with a number of changes implemented to ensure improved border management

6 July – present
Victoria experiences a resurgence of COVID-19 cases and re-enters lockdown conditions. New cases also begin to appear again in NSW and restrictions begin to be re-imposed.
Like New Zealand, Victoria and NSW had previously reached a case load of zero and had seen lockdown restrictions lifted

15 July
PM Jacinda Ardern announces response framework going forward, which will involve localised lockdowns in the event of another community-wide outbreak of COVID-19

27 July
Tertiary institutions re-open for face-to-face lectures, with corresponding increase in traffic and mode used

11 August
New Zealand confirms four new community transmitted cases of COVID-19 in Auckland. PM Jacinda Ardern announces that Auckland will move to level 3 and the rest of New Zealand will move to level 2 at noon, 12 August

12 August **Auckland moved to alert level 3 at noon, rest of New Zealand moved to alert level 2**

12 August
New Zealand Police set up nine checkpoints at the borders of the Auckland region to monitor who is entering and exiting the city. Aucklanders asked to leave or enter for essential purposes only.

24 August
PM Jacinda Ardern announces that Auckland will remain at level 3 until 11.59pm on 30 August, with the rest of the nation remaining at level 2. Masks will become compulsory on public transport.

30 August **Auckland moved to alert level 2.5 at midnight, rest of New Zealand remains at alert level 2**

4 September
PM Jacinda Arden announces alert levels to remain in place for at least 10 more days.

14 September
PM Jacinda Arden announces alert levels to extend one more week and social distancing rules on transport to be relaxed, with mask wearing remaining compulsory

21 September
PM Jacinda Arden announces Auckland will move to level 2 on 23rd & **the rest of New Zealand will move to level 1 at 11:59pm**, with mask wearing no longer compulsory on public transport outside of Auckland

23 September **Auckland moved to alert level 2 at 11.59pm**

25 September Significant disruption to the Auckland transport network due to damage to the Auckland Harbour Bridge, coupled with disruption issues to the train network.

7 October **Auckland moved to alert level 1 at midday to match rest of New Zealand**

12 November
Single community transmission case reported in Auckland, with Auckland CBD workers urged to work from home. These conditions are lifted the following day. Reported community outbreak in Wellington as well.

Context: New Zealand COVID-19 timeline - 2021

14 February
3 new cases of COVID-19 are recorded in the community.
Auckland moves to Alert Level 3 at 11:59pm. The rest of New Zealand moves to Alert Level 2.

17 February
2 new cases of COVID-19 are detected in the community, both linked to the Feb 14 cluster.
Auckland moves to Alert Level 2 at 11:59pm. The rest of New Zealand moves to Alert Level 1.

22 February
Auckland moves to Alert Level 1 at 11:59pm. All of New Zealand is now at Level 1.

28 February
There are now 15 cases linked to the Papatoetoe cluster.
Auckland moved into Alert Level 3 at 6am. The rest of New Zealand moves to Alert Level 2.

4 March 0.26% of New Zealanders have received at least one vaccine dose

4 March Waka Kotahi COVID-19 impact tracker fieldwork wave 24 begins

7 March
All new cases are in managed isolation facilities.
Auckland drops to Alert Level 2, the rest of the country drops to Level 1.

12 March
At midday, Auckland moves to Alert Level 1.

22 March
Announcement of New Zealand and Australia travel bubble

6 April
Commencement of New Zealand and Australia travel bubble

3 May
Announcement of New Zealand and Cook Islands travel bubble

17 May
Commencement of New Zealand and Cook Islands travel bubble

22 May 7% of New Zealanders have received at least one vaccine dose, 4% have received two

22 May Waka Kotahi COVID-19 impact tracker fieldwork wave 25 begins

Delta variant transmission in the community

17 August
Ministry of Health announces new community case in Auckland, with history of recent travel in Coromandel region **New Zealand moved to Alert Level 4 at 11.59pm**

31 August **New Zealand South of Auckland moved to Alert Level 3 at 11.59pm**

2 September **Northland moved to Alert Level 3 at 11.59pm, Auckland is the only region remaining at Level 4**

2 Sept 49% of New Zealanders have received at least one vaccine dose, 26% have received two

2 September Waka Kotahi COVID-19 impact tracker fieldwork wave 26 begins

7 September
From 11.59pm., New Zealand moves to Alert Level 2.
Auckland moves remains at Alert level 4.

21 September
From 11.59pm., Auckland and Upper Hauraki move to Alert Level 3.
The rest of New Zealand remain at Alert Level 2.

25 September
From 11.59pm., Upper Hauraki moves to Alert Level 2.
Auckland remains at Alert Level 3. The rest of the country remains at Alert Level 2

3 October
From 11.59pm., additional areas in the Waikato move to Alert Level 3 for 5 days.
Auckland remains at Alert Level 3. The rest of New Zealand remains at Alert Level 2

5 October
From 11.59pm., Auckland eases Alert Level 3 restrictions.
Some areas within the Waikato remain at Alert Level 3.The rest of New Zealand remains at Alert Level 2

7 October
From 11.59 pm., further extension of the Waikato Alert Level 3 boundary
Auckland remains at Alert Level 3 with some restrictions eased. The rest of New Zealand remains at Alert Level 2.

8 October
From 11.59pm., Northland moves to Alert level 3.
Auckland and parts of the Waikato remain in Alert Level 3. The rest of New Zealand remains at Alert Level 2.

15 October
PM Jacinda Ardern announces NZ will soon move to COVID-19 Protection Framework

19 October
From 11.59pm., Northland moves to Alert level 2.
Auckland and parts of Waikato remain at Alert Level 3. The rest of New Zealand remains at Alert Level 2.

27 October
Parts of the Waikato at Alert Level 3 move to Step 1 of Alert Level of Level 3
Auckland remains at step 1 of Alert Level 3. The rest of New Zealand remains at Alert Level 2.

2 November
Upper Northland moves to Alert Level 3. From 11.59 pm., Parts of the Waikato at Alert level 3 move to Alert Level 3 Step 2.
Auckland remains at Step 1 of Alert Level 3. The rest of New Zealand remains at Alert level 2.

9 November
From 11.59 pm., Auckland moves to Alert Level 3 Step 2. Upper Northland remains at Alert Level 3.
Parts of the Waikato remain at Alert Level 3 Step 1. The rest of New Zealand remains Alert Level 2.

11 November
Upper Northland moves to Alert Level 2.
Auckland and parts of the Waikato remain at Alert Level 3, The rest of New Zealand remain at Level 2.

16 November
Parts of the Waikato move to Alert Level 2.
Auckland remains at Alert Level 3 Step 2. The rest New Zealand remains at Level 2.

Cumulative vaccination data sourced from health.govt.nz on 14.09.2021

Context: New Zealand COVID-19 timeline – 2021/22

Delta variant transmission in the community

2 December
From 11.59pm on 2 December 2021, New Zealand moves to the COVID-19 Protection Framework, also known as the traffic light system. **The South Island and parts of the North Island are at orange. Auckland, Northland, and areas from Whanganui and Rangitikei to East Cape in red.**

13 December
From 11.59pm on 30 December, Auckland and most of the other regions currently in red move to orange.
South Island remains orange and Northland remains at red.

16 December
First case of Omicron reported in New Zealand, in managed isolation in Christchurch.

21 December
Government announces that phased border reopening will be delayed until the end of February.

2022

17 January
Over 18's can book a booster vaccine shot four months after their second vaccine. The Pfizer vaccine is available to children aged 5-11 years at 500 vaccination sites

17 January Vaccination rate of eligible people reaches 95% first dose, 93% second dose

Omicron variant transmission in the community

18 January
First case of community transmission of Omicron in New Zealand,

20 January
Covid-19 Protection Framework Level change: From 11.59pm., Northland currently at red joins the rest of New Zealand at orange. **440 cases on Omicron and 32 cases of Delta detected at the border since 1 December 2021**

21 January
Due to the infectiousness of Omicron, case isolation temporarily increased to 14 days from 10 days. **The isolation time for close contacts has been increased to 10 days, from seven.**

22 January Of those eligible, 54% have received a booster shot

23 January
COVID-19 Protection Framework level change: From 11.59pm., All of New Zealand goes to red from orange, due to high risk of undetected community spread of Omicron.

3 February
New date announced for border reopening, which will begin on February 27 with fully vaccinated New Zealanders and other eligible visitors returning from Australia.
From 11.59pm., medical type masks are now mandatory for workers subject to compulsory vaccination and in a public facing role.

4 February
The approved time between the second vaccine and the booster reduced for those who are over 18, from four months to three.

24 February
From the 11.59pm., Phase 3 of the Governments plan comes to effect. Only household contacts will be considered contacts, RAT-detected cases will self-notify their result to the official register, those who test positive to notify their own contacts, and rapid antigen tests introduced at Auckland general practices and urgent care clinics.

27 February
From the 11.59pm., borders reopen to vaccinated New Zealanders from Australia. **MIQ is removed with self-isolation and test on arrival.**

28 February
Most travellers entering New Zealand from 28 February 2022 must provide evidence of a negative COVID-19.
Government announces self-isolation requirements to be relaxed for returning New Zealanders.

1 March Novavax vaccine approved in New Zealand for those 18 and older.

2 March
from 11.59pm, Fully vaccinated New Zealanders and other eligible people entering from Australia are no longer required to isolate. They must return a negative pre-departure test result. They must also return negative RAT results on arrival and on day 5/6; those who are COVID-positive must report the results and self-isolate.

4 March
Borders opened to New Zealanders and other eligible travellers from anywhere in the world and don't have to self-isolate. **51.6% of children aged 5-11 years have had their first dose, 72.2% of people eligible have received a booster.**

9 March
Government announces case and household contact isolation period to reduce to seven days from 10, at 11.59pm on 11 March.

10 March Waka Kotahi COVID-19 impact tracker fieldwork wave 27 begins

11 March
From 11.59pm., case and household contact isolation periods are reduced from 10 to seven days.

18 March
From 11:59pm, unvaccinated NZ citizns and those eligible do not have to enter MIQ or self-isolation.

25 March
Limits on outdoor gatherings are removed, limits on indoor gatherings changed from 100 to 200. QR code scanning and signs are no longer required

Cumulative vaccination data sourced from health.govt.nz on 14.09.2021

Context: New Zealand COVID-19 timeline – 2021/22

Omicron variant transmission in the community

4 April
Vaccine passes are no longer required for venues, and vaccinations are no mandatory in a number of occupations

12 April
From 11:59 fully-vaccinated Australians are able to travel to NZ isolation-free

13 April
New Zealand moves from Red to Orange level at 11:59pm. Indoor capacity limits and seated / separate rule for hospitality venues are removed

23 April
First case of Omicron XE is detected in New Zealand, but is not yet in the community

1 May
First case of Omicron BA.4 variant is detected in New Zealand, but is not yet in the community.
From 11:59pm vaccinated travellers from visa waver countries (UK, US, Japan, Korea, Singapore) will be able to travel to New Zealand isolation-free

5 May
An anti-viral medication for those with COVID 19 becomes available on prescription. Immunocompromised children aged 5-11 can receive a third dose of Pfizer.

24 May
Vaccine passes become available for those aged 12 and older who are up-to-date with their COVID-19 vaccinations

24 May
New Zealand will remain at orange level, with the next review in late June

25 May
First case of Omicron BA.2.12 variant is detected in the community.

26 May Waka Kotahi COVID-19 impact tracker fieldwork wave 28 begins

Cumulative vaccination data sourced from health.govt.nz on 14.09.2021

Section 2 – Waka Kotahi transport key findings summary

Key findings – waves 1-28

Waka Kotahi COVID-19 transport impact tracker

Wave 28 took place with New Zealand having spent over a month at the Orange 'traffic light' setting under COVID, following a reduction in cases and hospitalisations. This meant increased capacity limits in many businesses and the removal of some masking requirements, though these remain in place on public transport, among other indoor settings. Under these conditions, New Zealanders are assessing risk and safety around travel differently.

- Concerns about risk of infection and transmission declined significantly under Orange settings, but these concerns remain greater than they were for much of the initial 2020 outbreak.
- Stated concern about the global impact of COVID continues to decline significantly. While three quarters still express concern, this is almost 10-points lower than it was a year ago.
- There is a corresponding decline in concern about leaving the house and more NZers saying they are travelling as they did pre-COVID, with little disruption to their daily travel routines.
- However, while these factors combined indicate reductions in COVID-related anxieties, these concerns remain greater than comparable periods of May 2021.

Possibly as an outcome of lessening concern, self-isolation behaviours again decreased significantly, with 2-in-5 saying they are moving around as they normally would

- Among the smaller number still self isolating during the week of fieldwork, there was a significant reduction in COVID-related reasoning. However, at a total level, the normal isolating for non-COVID reasons remained consistent.
- It may be that this indicates something close to a base level of these behaviours, with around 1.5% of NZers only leaving the home for essentials like food and medicine in a typical week.

Accompanying this up-lift in travel has been a significant increase in the use of many modes, with reported weekly private vehicle travel at the highest level recorded since November 2020, increasing a significant 3-points since March.

- At a time when half-price fares have been in place across the public transport network, reported weekly patronage has also risen, up a significant 5-points since March. This is, however, still 3-points lower than reported weekly patronage was in May 2021, when Omicron and Delta variants had yet to spread in New Zealand communities. Nonetheless, reported weekly bus and train usage both increase significantly in May.
- Half price fares are having some reported impact on patronage: of those travelling in the past week, a quarter say that at least one journey was taken as a result of the half price fares, with more than 1-in-10 mode-shifting from private vehicles and an almost equal proportion shifting from active modes, with Wellington having seen the most impact. Outside of Auckland and Wellington, which have higher patronage and more network options, the proportion of added journeys is lower at 17%.
- There has been a corresponding shift in affordability and convenience perceptions among bus and train users, with reliability perceptions up since March. Compared to last year though, there has not been as much improvement on COVID-related factors like hygiene and distancing.

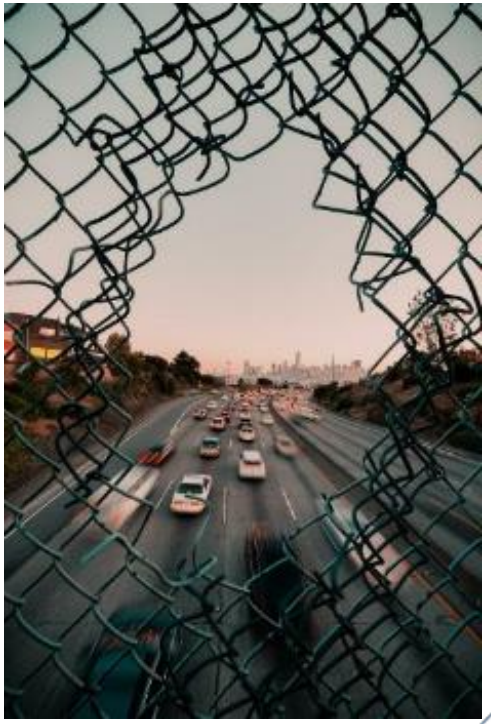
At a total level, the proportion commuting for the majority of their work has increased significantly, having remained stable between September and March.

- Between September and March, the proportion working each day increased, possibly because of relaxations in restrictions that meant those in industrial and service jobs were able to return to full time work under the red traffic light setting, May has seen more of a shift 'back to the office' with a greater share of 'on-site' working at each day.
- This might have benefitted the public transport network in particular: compared to March, commuters' pre-COVID mode choices, hypothetical choices and actual choices appear much more closely aligned, with actual Private Vehicle usage no longer over-indexing quite as much and PT commuting occurring at a rate comparable with pre-COVID usage.

Section 3 – Context

Key findings – context

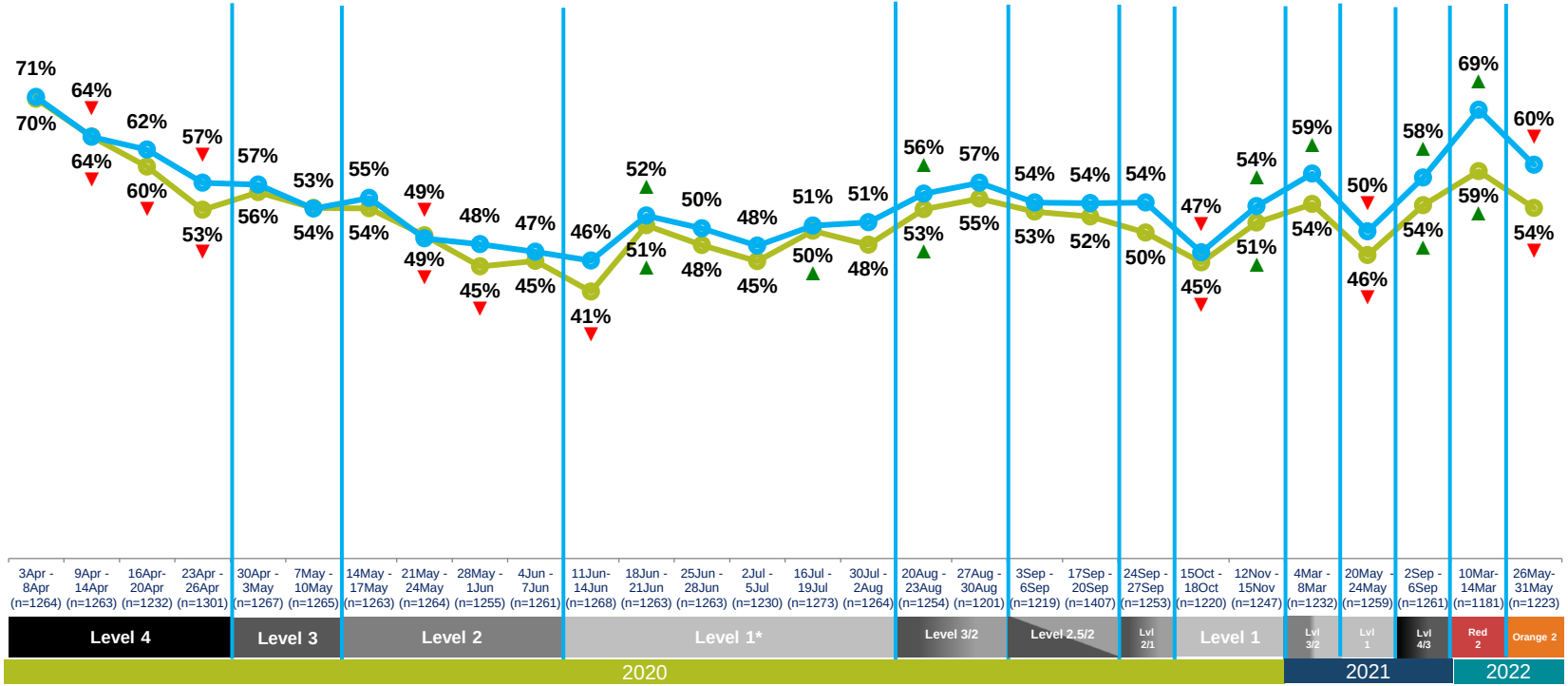
Waka Kotahi objective – how do general attitudes and fears impact transport usage?



- 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 under *Orange* Traffic light settings. Compared to March, reported daily COVID cases had declined, but remained in the thousands each day. While New Zealanders were therefore freer to go about their daily business with minimal restriction, the prevalence of COVID cases still had the capacity to make travellers re-assess their options.
- Concerns about risk of infection and transmission declined significantly under Orange settings, but these concerns remain greater than they were for much of the initial 2020 outbreak: only the early weeks of Level 4 had higher levels of stated concern. With isolation requirements from close contacts reduced, there is less concern about the types of disruption this might cause.
- Having been consistent throughout the pandemic, stated concern about the global impact of COVID continues to decline significantly wave-on-wave. While three quarters still express concern, this is almost 10-points lower than it was a year ago. Concern about the compliance of others with self-isolation rules continues to decline more gradually, down only 4-points compared to a year ago, with two thirds at least somewhat concerned about this particular risk.
- This may impact on attitudes to moving around. Almost 4-in-5 strongly or mostly disagree that they are worried about leaving the house, a significant increase from March, but 12-points short of a year ago. Similarly, about 3-in-5 strongly or mostly agree that they can easily get to where they need to. In addition, only 13% agree that their travel routines are disrupted at the moment and more than a third say their travel routines are no different now than they were before the outbreak of COVID-19.
- Therefore, while there are indications of recent reductions in COVID-related anxieties around travel, these anxieties are still greater than they were in 2021.
- However, there are explicit expressions of continuing caution around cases. There has been a significant decrease in the proportion who *will not travel as much* until cases drop, but this still remains above 40%, so many are still putting limits on their travel.
- Additionally, while 36% agree that they are avoiding public transport until cases drop, only 26% indicate that this decrease in cases will lead to them using PT *more* than they currently do. While reductions in cases may decrease *rejection*, the uplift in public transport network users might be less.
- Having peaked in March, all concerns about the economy and personal finances declined significantly again.

Concern about transmission and infection has fallen significantly from the March peak, but still remains higher than during the initial Level 1 period

COVID-19 concerns (NETT all concerned)

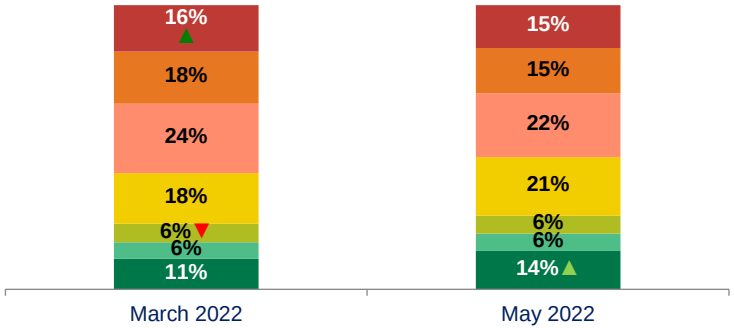


QPTUSE3. How personally concerned are you about each of the following?

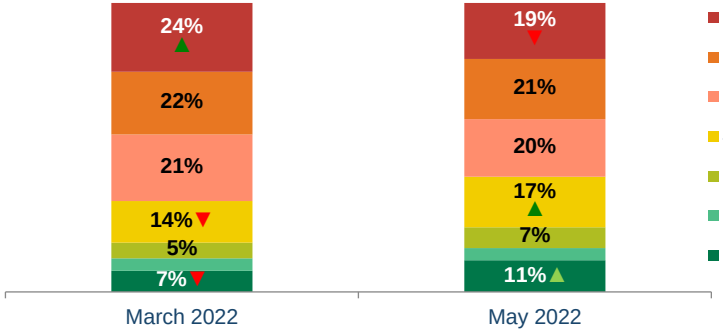
*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during Level 1*

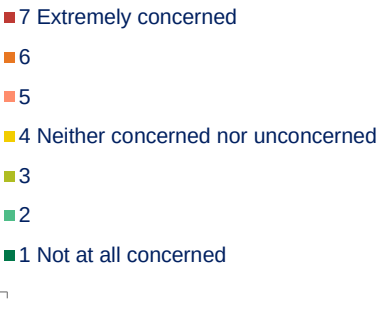
As well as being significantly less concerned about infecting others, the relaxation of guidelines at Orange setting corresponds with less concerns about self-isolating

The risk of COVID-19 infection to yourself

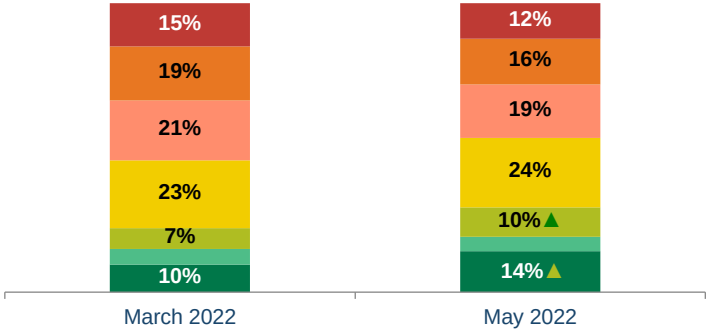


The risk of transmitting COVID-19 to others

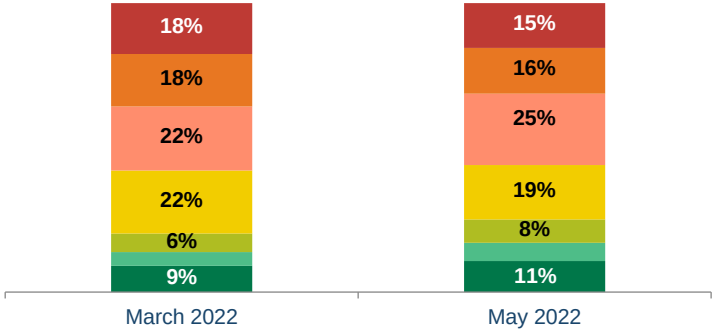


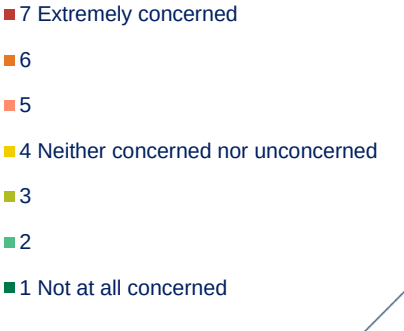


The risk that you will have to self-isolate because of contact with a positive case



The risk of disruption to your personal plans or work because of infection or contact with a positive case



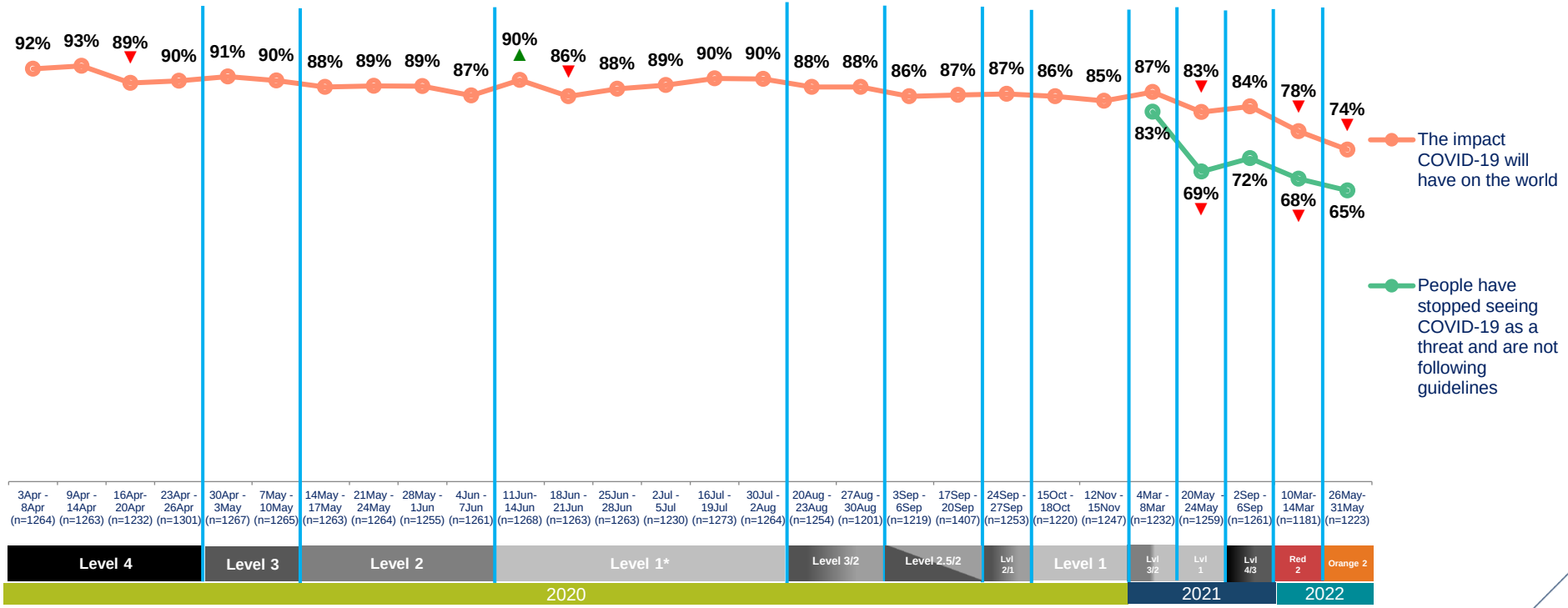


QPTUSE3. How personally concerned are you about each of the following?

Base: all adults 15+ in New Zealand during wave 27, 10 Mar-14 Mar 2022 (n=1,181); 26 May-31 May 2022 (n=1,223)

While wider concerns about the impact of COVID continue to decline, the majority of New Zealanders indicate at least some concern about global impact

COVID concerns (NETT all concerned)

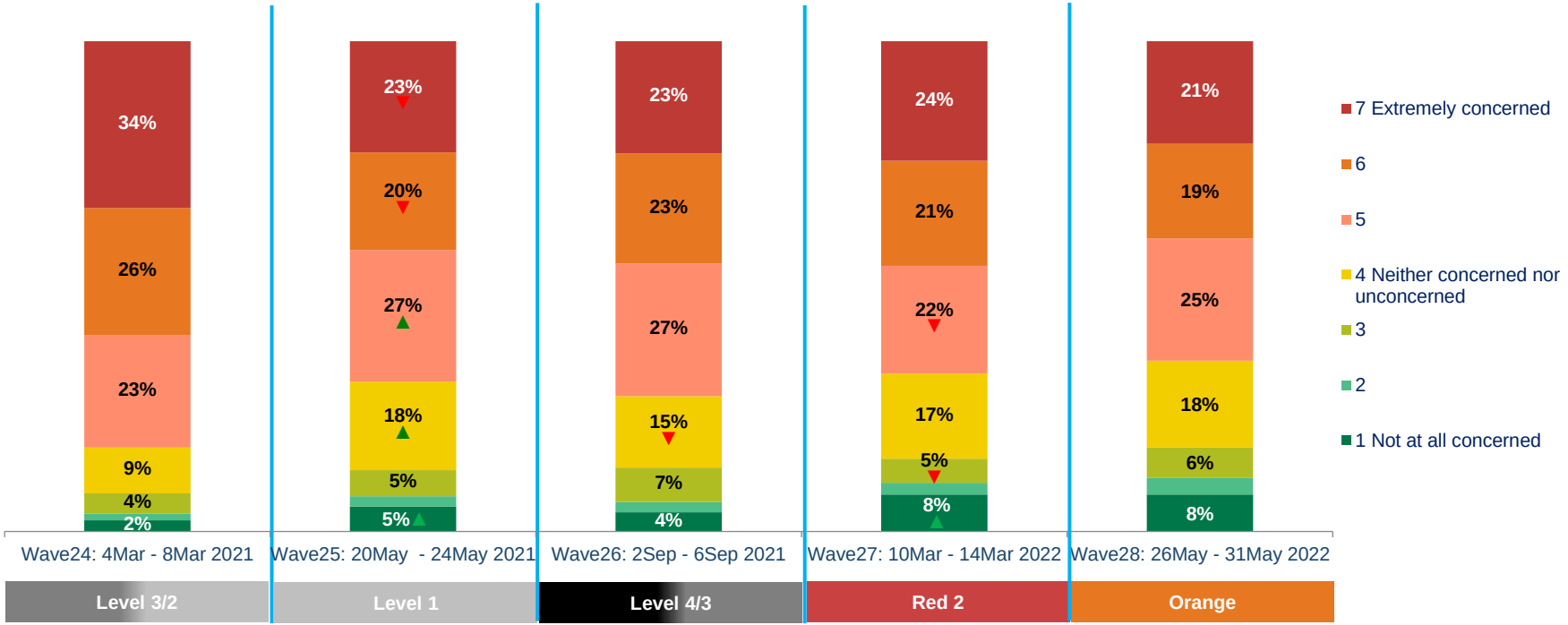


QPTUSE3. How personally concerned are you about each of the following?

*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during Level 1*

Compared to a year ago, the proportion who are extremely concerned about COVID compliance has not changed significantly

People have stopped seeing COVID-19 as a threat and are not following guidelines

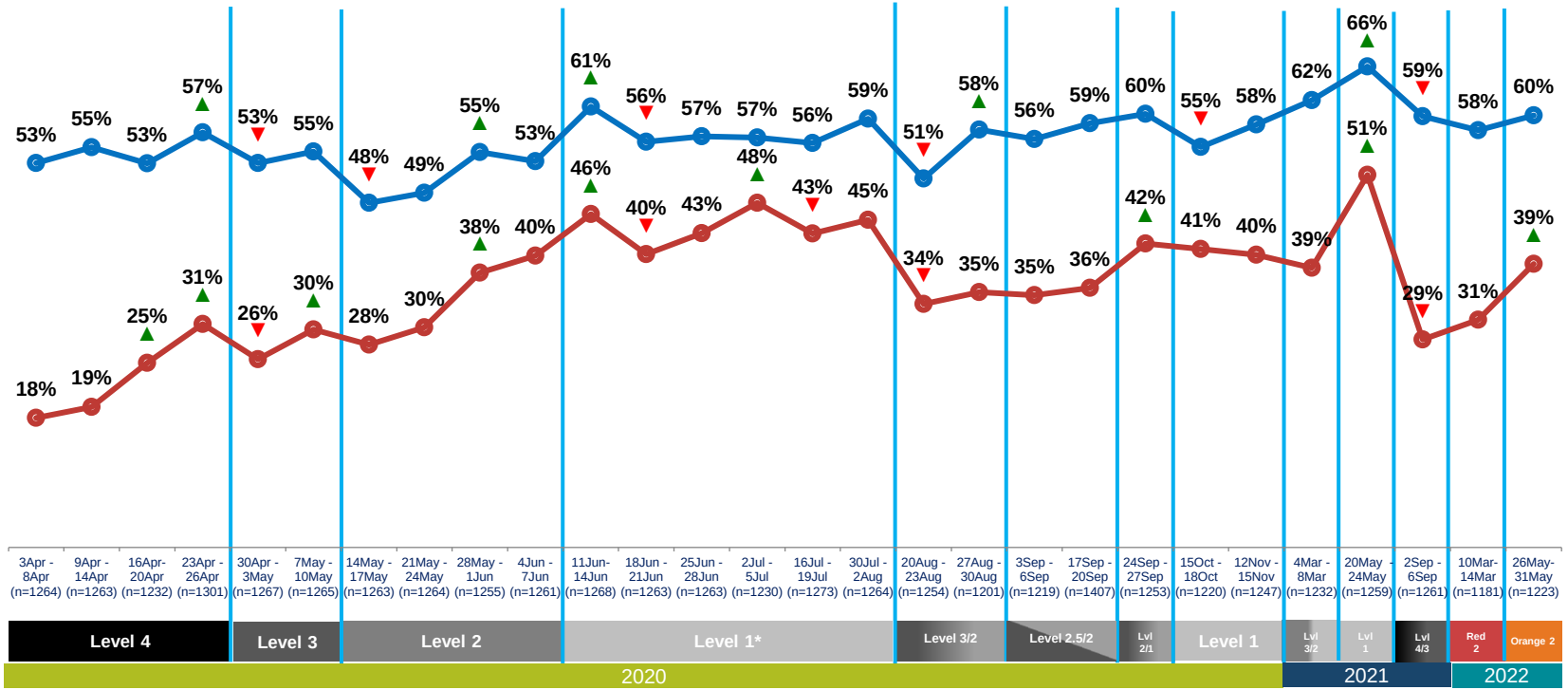


QPTUSE3. How personally concerned are you about each of the following?

Base: all adults 15+ in New Zealand, 4 Mar-8 Mar 2021 (n=1232); 20 May-24 May 2021 (n=1259); 2 Sep-6 Sep 2021 (n=1261); 10 Mar-14 Mar 2022(n=1181); 26 May-31 May 2022 (n=1223)

While not everyone is confident that they can easily get where they need to go, the proportion of people not worried about leaving the house has improved significantly

COVID-19 attitudes

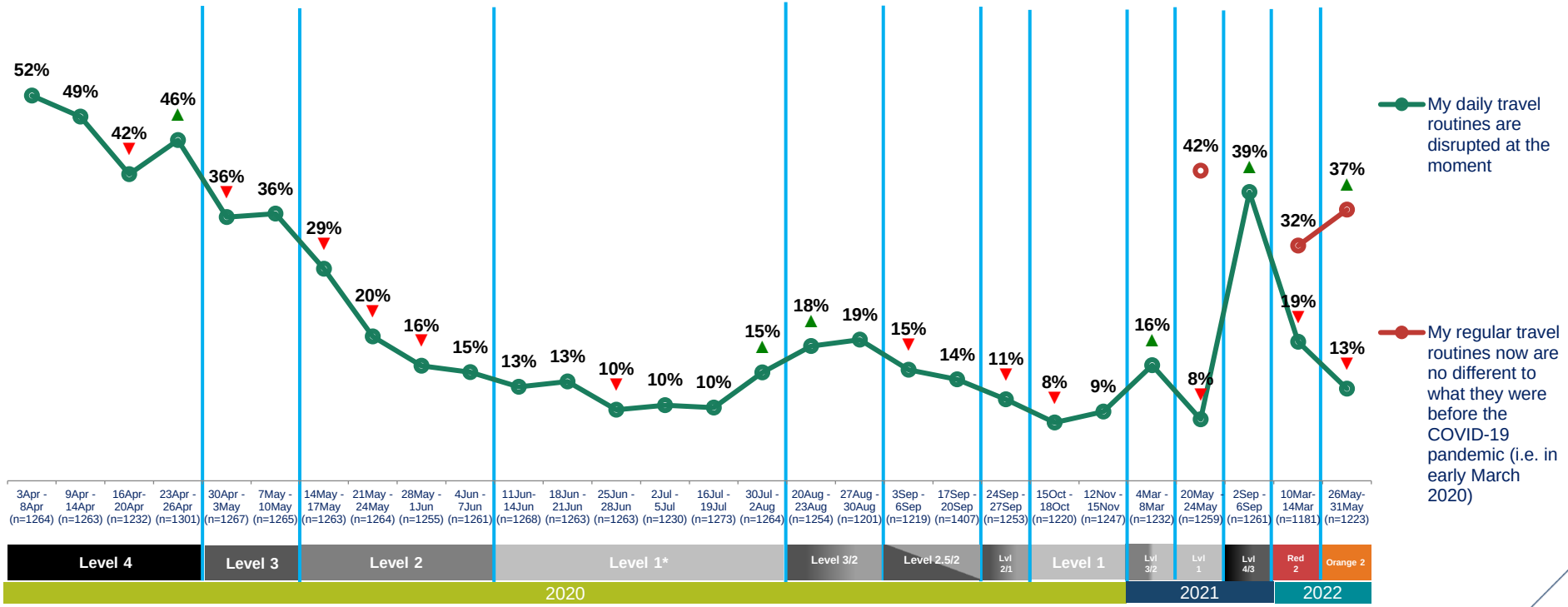


QATT. To what extent do you agree or disagree with the following statements?

*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during Level 1*

Although stated disruption to daily travel routines has decreased significantly again, only 37% think their routines are fully back to being normal again

COVID-19 disruption (all strongly/mostly agree)

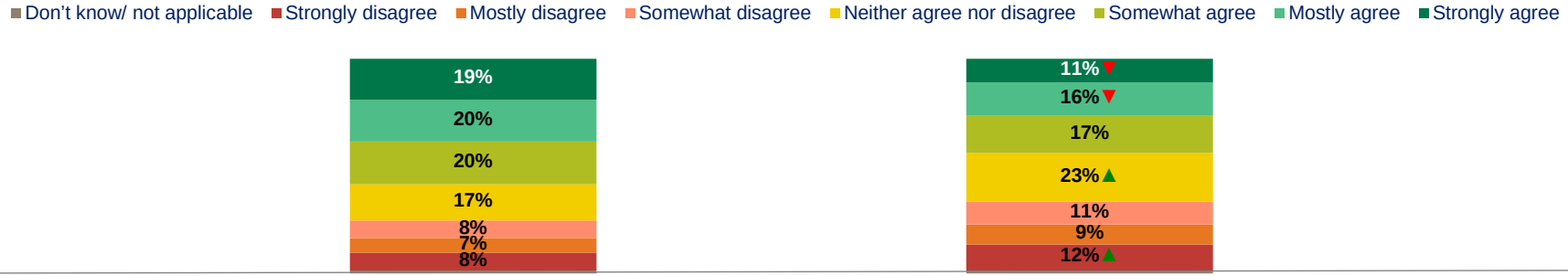


QATT. To what extent do you agree or disagree with the following statements?

*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during Level 1*

Significantly fewer are limiting their travel until community cases decline compared to March, so case numbers may have reached acceptable levels for many

I don't think I will travel as much as I used to unless there is a significant decrease in COVID-19 cases in the community



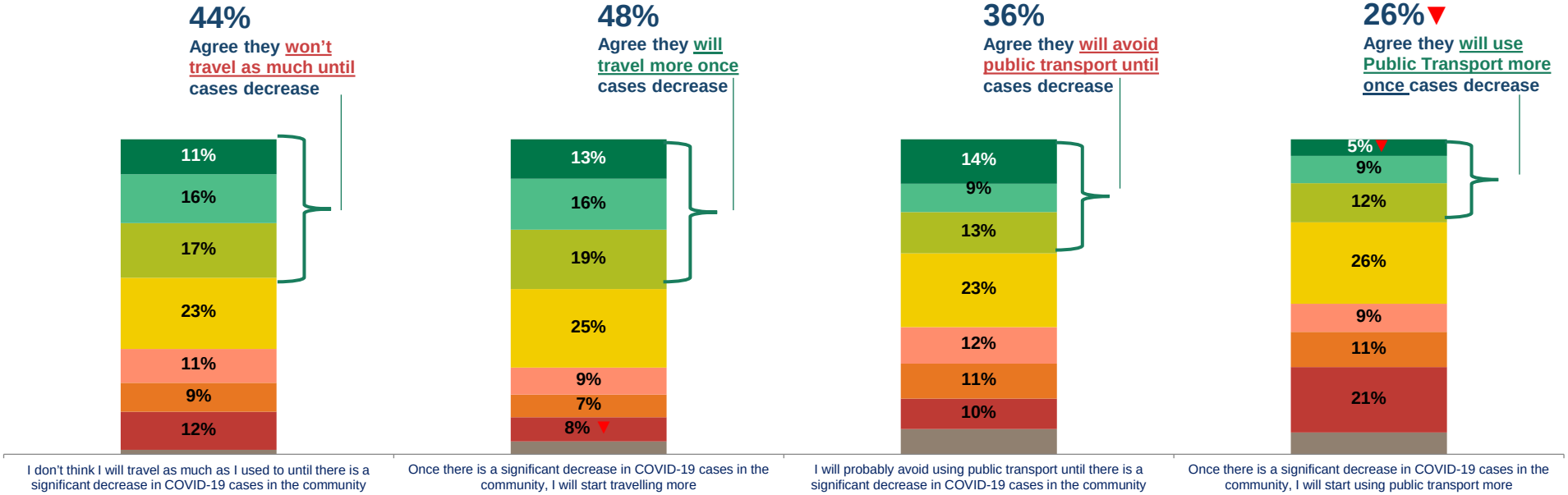
I will probably avoid using public transport until there is a significant decrease in COVID-19 cases in the community

March 2022 *May 2022*

QATT. To what extent do you agree or disagree with the following statements?
Base: all adults 15+ in New Zealand 10 Mar-14 Mar 2022 (n=1181); 26 May-31 May 2022 (n=1223)

While a third agree they're avoiding public transport until cases decrease, significantly fewer agree that they'll use it more once that decrease happens

Will a decrease in community cases really result in greater travel?

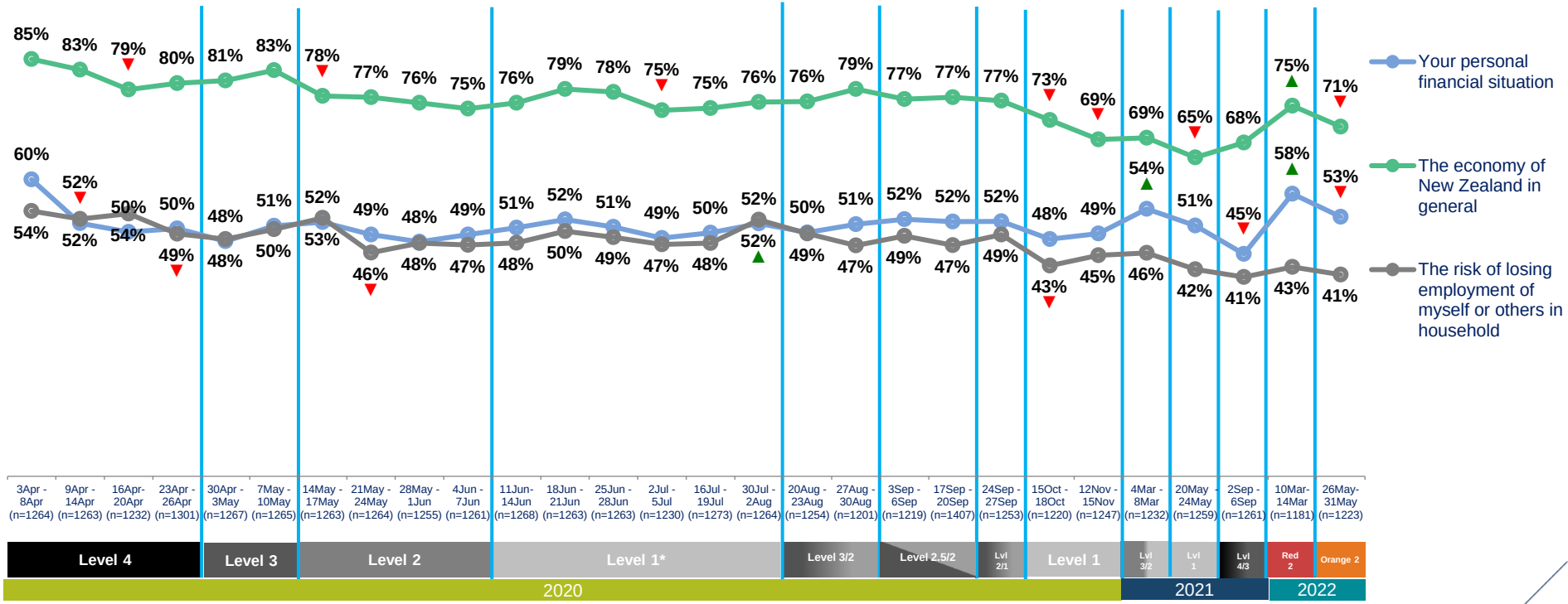


Negative framing | **Positive framing** | **Negative framing** | **Positive framing**

QATT. To what extent do you agree or disagree with the following statements?
Base: all adults 15+ in New Zealand, 26 May-31 May 2022 (n=1223)

Economic concerns have also declined significantly since March and concerns about employment are at the joint lowest they have been within this tracking

Economic concerns (NETT all concerned)



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

*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during Level 1*

Section 4 – Behaviours

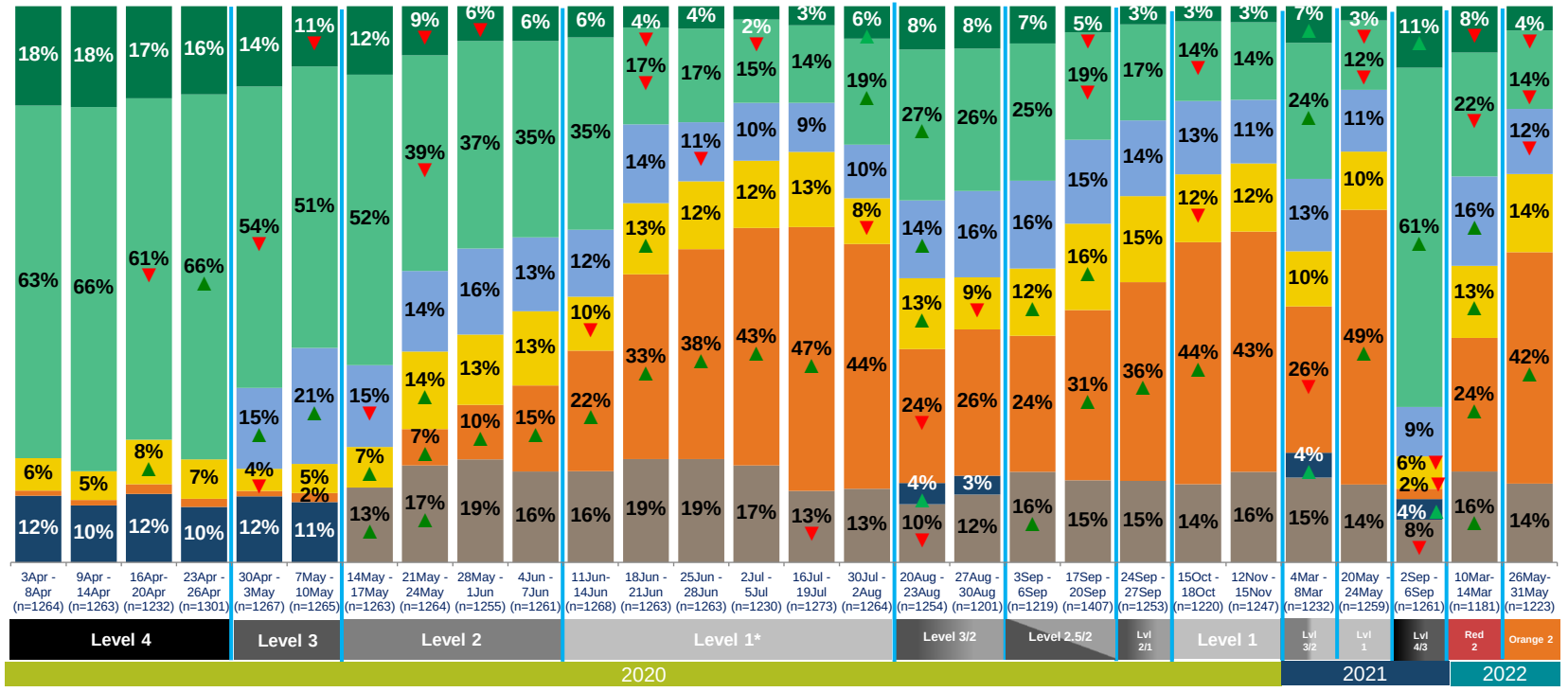
Key findings – behaviours

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

- In light of changing attitudes and concerns around COVID-19 in the country, New Zealanders may change their behaviour in different ways to adapt to their situation. This includes moderating the amount of weekly travel undertaken or taking certain steps to protect oneself in transit, such as wearing masks.
- The proportion of New Zealanders restricting their movement severely once again decreased significantly between March and May.
- At this point, general reported activity is comparable to many weeks under Alert Level 1 restrictions in the previous restrictions.
- However, almost 1-in-5 reported at least *partial* self-isolation, though incidences of this behaviour are comparable to May 2021.
- Compared to March, a significantly smaller share of this self-isolation is COVID-related, down 18 points to 64%, and the proportion isolating due to symptoms dropped from a third to a fifth.
- However, the proportion isolating for non-COVID reasons was up significantly to over a third. When re-based to the total population, this was comparable to rates reported in March at 1.6%. In the absence of a pre-COVID read, this may be an indicator of typical ‘self-isolation behaviours’, with just under 2% of New Zealanders only leaving the house for *essentials, if at all* in a normal week.

Reported self-isolation declined significantly again, with behaviour in line with that reported under Level 1 conditions and 2-in-5 travelling as normal

Isolation – travel behaviour

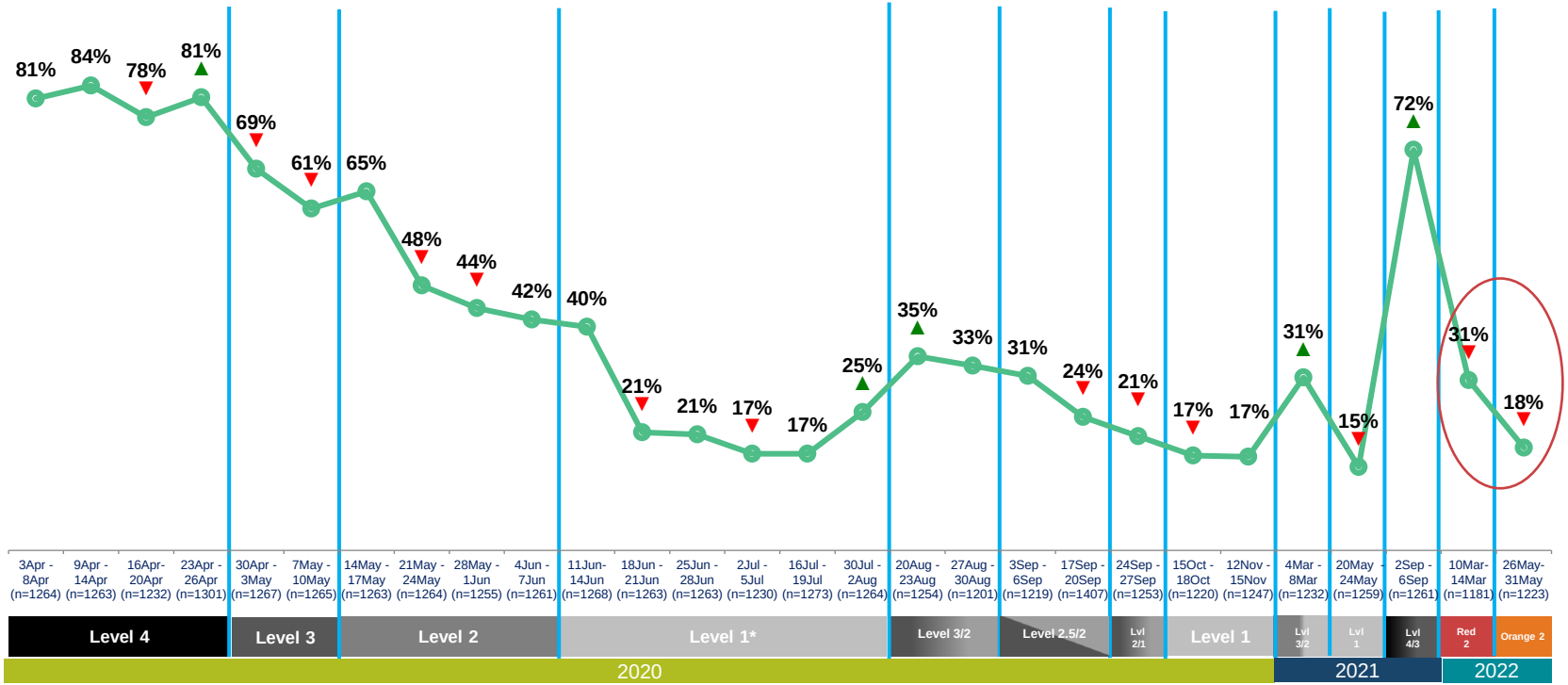


ISO_1_TRAVEL Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during Level 1*

Despite significant decrease, 1-in-5 indicate activity in line with self-isolation; this has not previously fallen much further, and there may be isolation in normal circumstances

Self-isolation over time – all at least partially self isolating

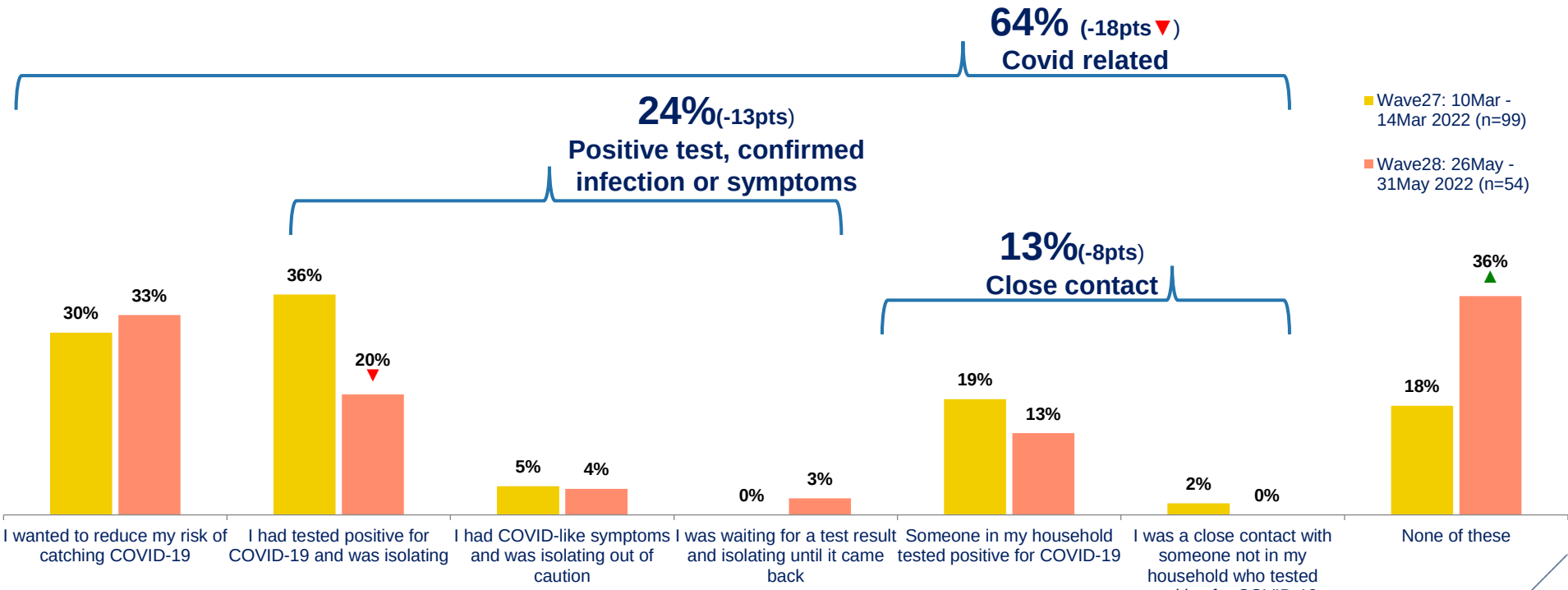


ISO_1_TRAVEL Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

*Base: all adults 15+ in New Zealand *fieldwork frequency decreased from weekly during Level 1*

Significant decline in COVID-related reasons for isolation indicates that a sizeable amount of the behaviour seen in May would occur outside of COVID conditions

Reasons for self-isolation

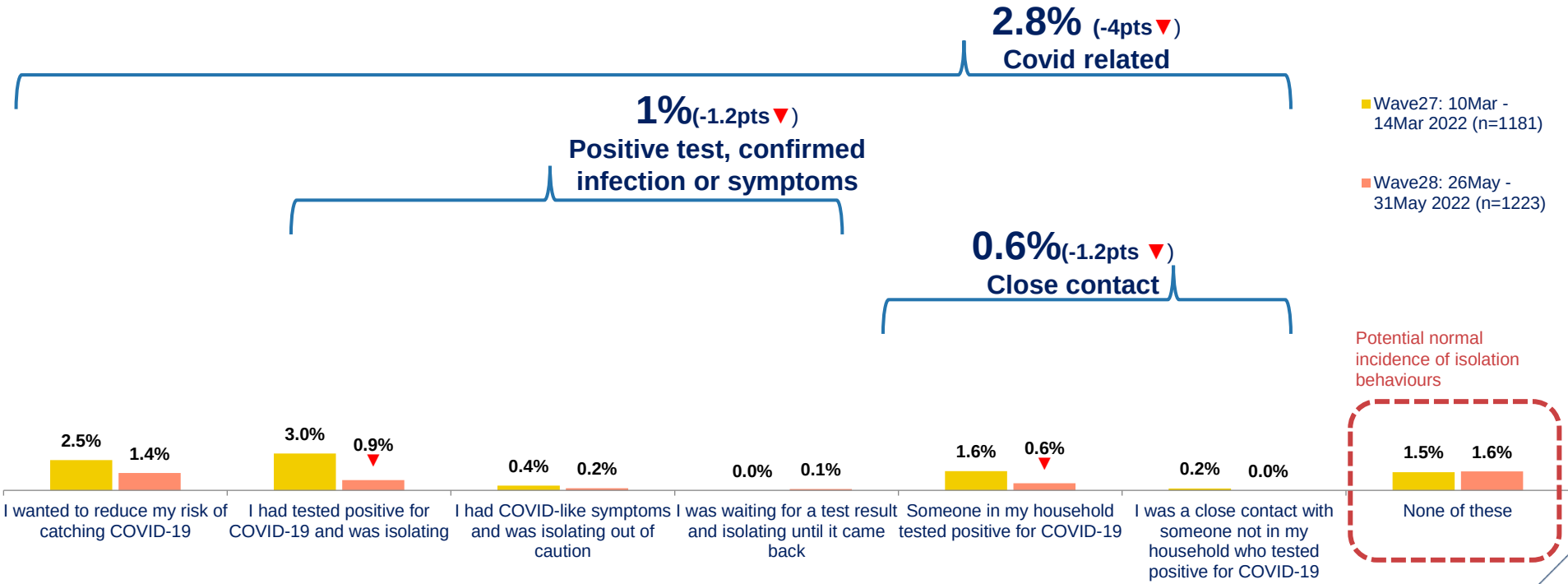


ISO_2 Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

Base: all adults 15+ in New Zealand self isolating during preceding week, 10 Mar-14 Mar 2022 (n=99); 26 May-31 May 2022 (n=54)

In total, the proportion isolating due to COVID has more than halved since March; it's possible that c.1.5% normally only leave the house for essentials in a typical week

Reasons for self isolation – as a share of total population



ISO_2 Which, if any of the following best describes your approach to leaving the house over the last week, excluding for exercise?

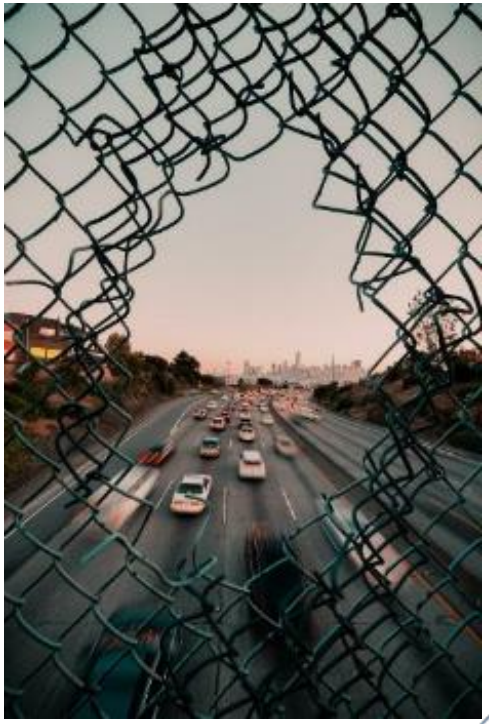
Base: all adults 15+ in New Zealand, 10 Mar-14 Mar 2022 (n=1,181); 26 May-31 May 2022 (n=1,223)

Section 5 – Journeys and mode usage

Key findings – local and domestic journeys

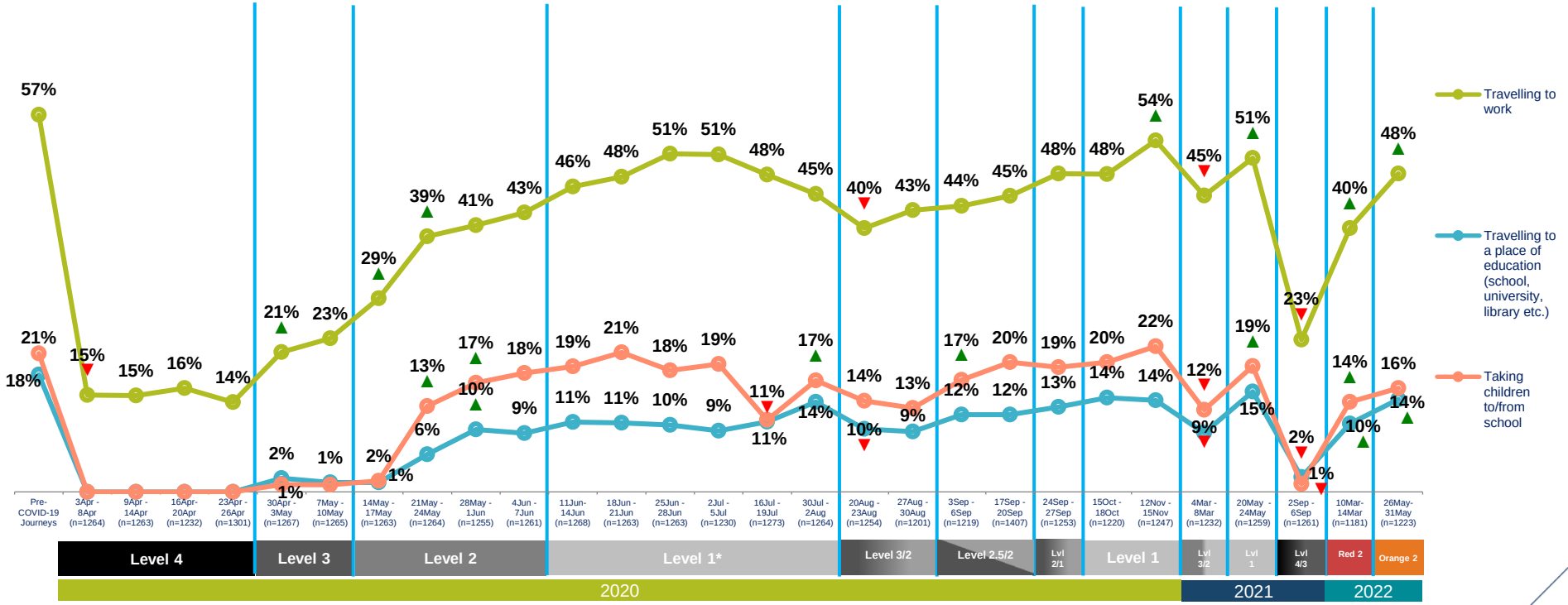
Waka Kotahi objective – how is travel changing?

- 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.
- Amid relaxed restrictions and a lessening of stated concerns around COVID risks, there are signs of a continuing return to normal rates of essential travel. Stated weekly work travel increased significantly and is once again comparable with reported behaviours under Alert Level 1 conditions, and only 3-points below rates reported a year ago.
- Travel to places of education has similarly increased significantly, with this activity occurring much as it did during Level 1 conditions and taking children to school increasing directionally also.
- Accompanying this up-lift in travel has been a significant increase in the use of many modes, reported weekly private vehicle travel is at the highest level recorded since November 2020, increasing a significant 3-points since March.
- At a time when half-price fares have been in place across the public transport network, reported weekly patronage has also risen, up a significant 5-points since March. This is, however, still 3-points lower than reported weekly patronage in May 2021, when Omicron and Delta variants had yet to spread in New Zealand communities, and lower than suggested pre-COVID rates of travel.



Reported weekly work travel increased again to within 3-points of a year ago, but still remains 9-points short of suggested pre-lockdown commuting

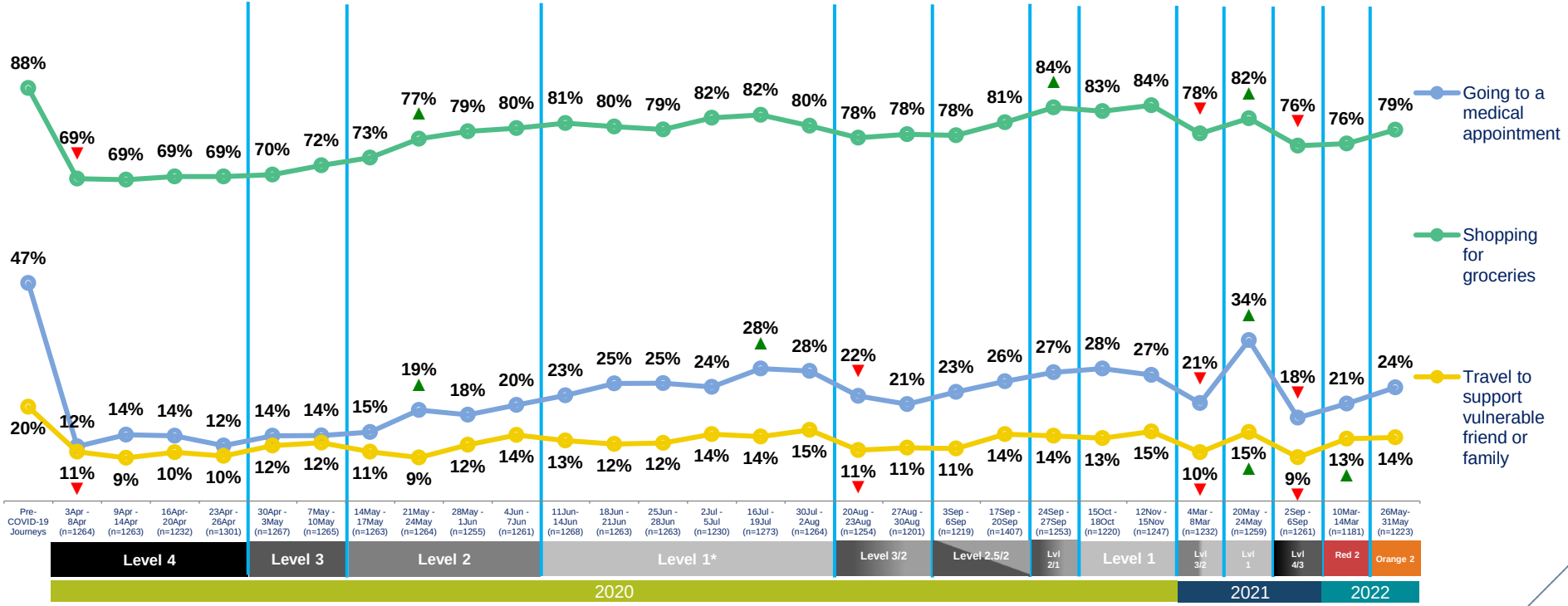
Frequent essential journeys



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 1-28 (n= between 1,181-1,407)*

The return to weekly grocery shopping has been a little slower, with this activity occurring at rates comparable to Level 2 conditions and less than a year ago

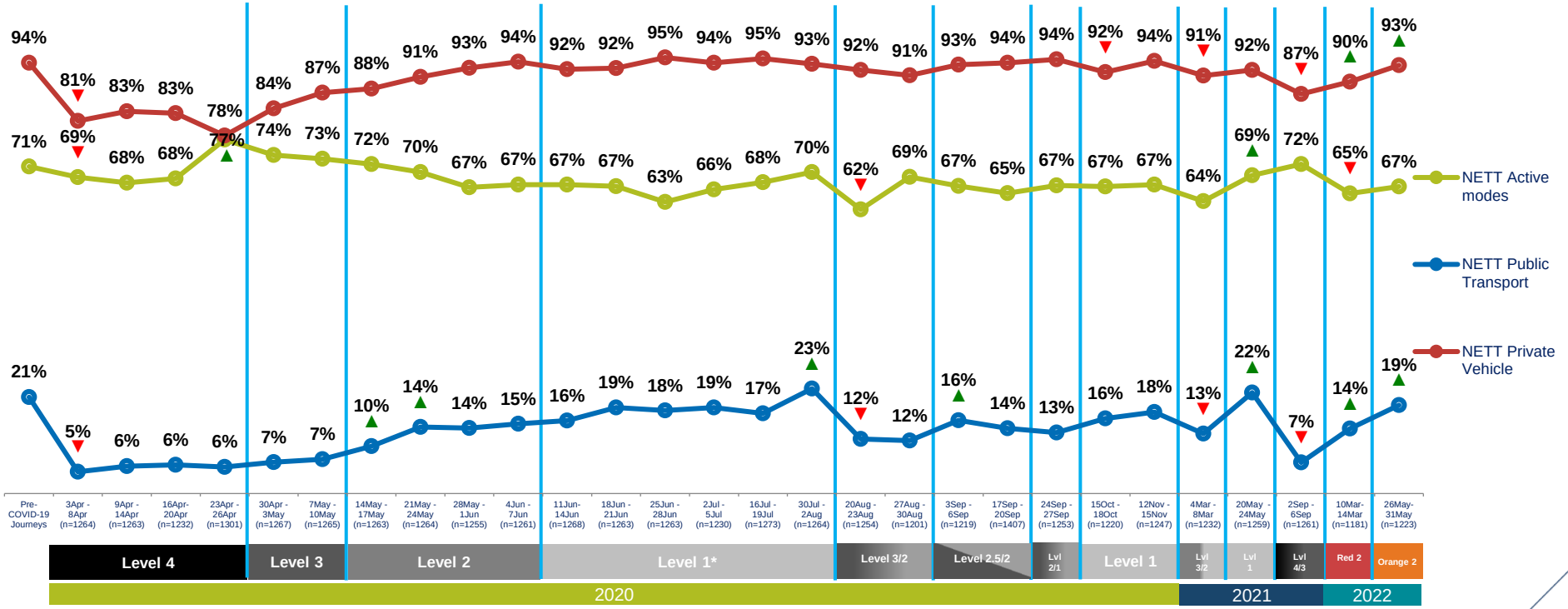
Less frequent essential journeys



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 1-28 (n= between 1,181-1,407)*

While weekly public transport usage continued to significantly improve, it remains lower than it was a year ago and lower than suggested pre-lockdown conditions

Changes in mode usage by wave – national



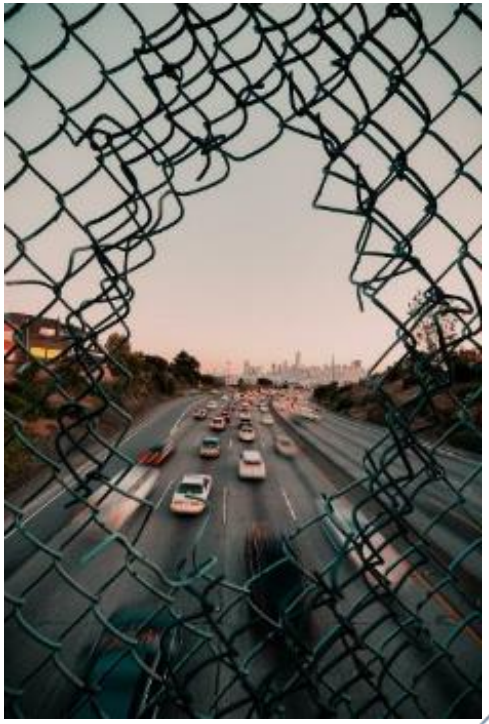
QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? *Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1-28 (n= between 1,181-1,407)*

Section 6 – Public transport

Key findings – public transport

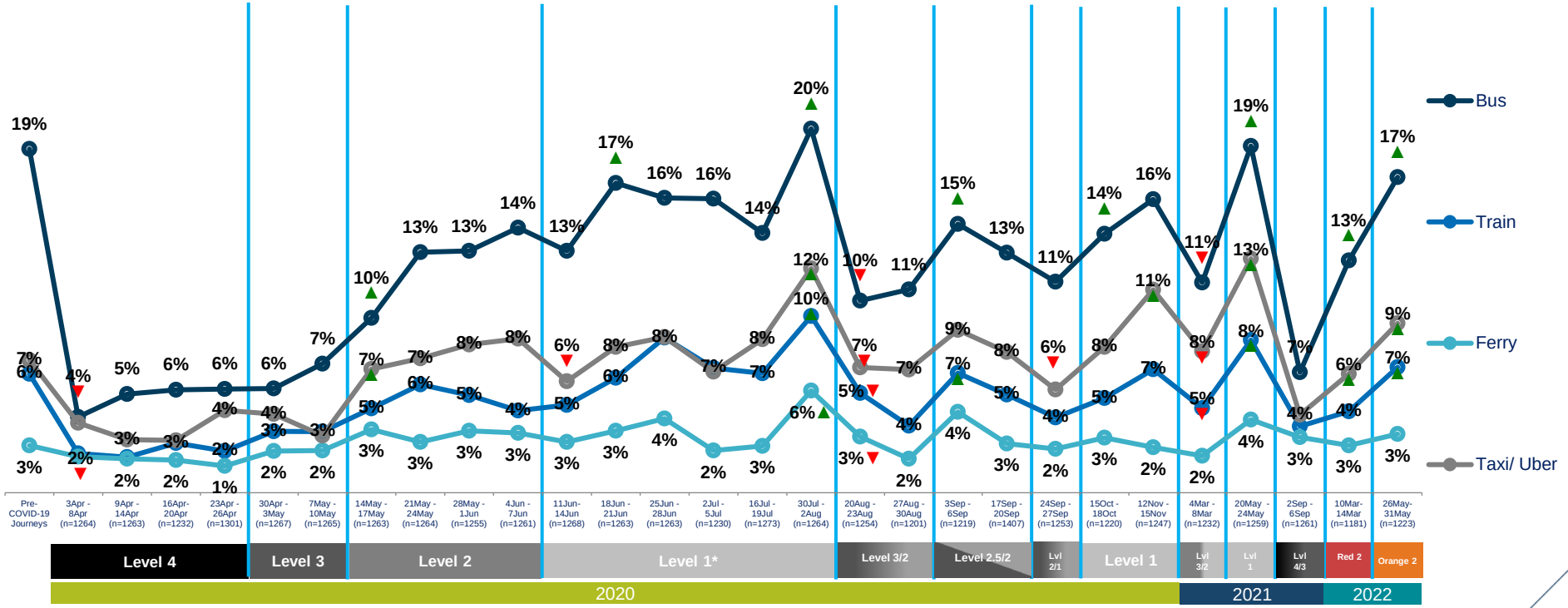
Waka Kotahi objective – how and why is travel changing?

- 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. Additionally, in May, public transport choices may be further influenced by the presence of half-price fares across the network.
- Reported weekly bus and train usage both increased significantly to reach levels close to, but a little short of, those reported in the same period a year ago.
- Among those who have decreased their PT usage since COVID, transmission-related concerns are significantly less cited as barriers compared to March, but are still twice as prevalent as they were a year ago. There have not been any particular barriers that have increased in frequency since March.
- It is a similar story in terms of triggers to return. However, it is notable that 24% say that they will use public transport *more* if half-price fares remain in place. These users may be enticed to return to higher frequency usage by more affordable fares, but are currently prevented by other barriers, such as concerns about transmission risks and general caution while under COVID restrictions.
- Half-price fares are having some reported impact on patronage: of those travelling in the past week, a quarter say that at least one journey was taken as a result of the half-price fares, with around 1-in-10 mode-shifting from private vehicles and a similar proportion shifting from active modes.
- There is a smaller proportion of completely new journeys within this. Wellington appears to have experienced the most significant impact, with 3-in-10 travellers adding journeys due to half-price fares. This was also a region that had a significant increase in weekly PT users. Outside of Auckland and Wellington, which have higher patronage and more network options, the proportion of added journeys is lower at 17%.
- There has been a corresponding shift in affordability and convenience perceptions among bus and train users, with reliability perceptions up since March. Compared to last year though, there has not been as much improvement on COVID-related factors like hygiene and distancing.
- For the first time since tracking began, it's possible to compare the perceptions of pre-COVID non-users with pre-COVID users. Bus and train users are generally more positive on all these metric, but the gap in perceptions of safety, hygiene and distancing is generally not much different between the two. Non-users appear to have traditionally stayed off services due to practical considerations like affordability, availability and convenience.



Reported weekly bus and train usage all increased significantly in the context of lighter restrictions and half-price fares, but both remain lower than a year ago

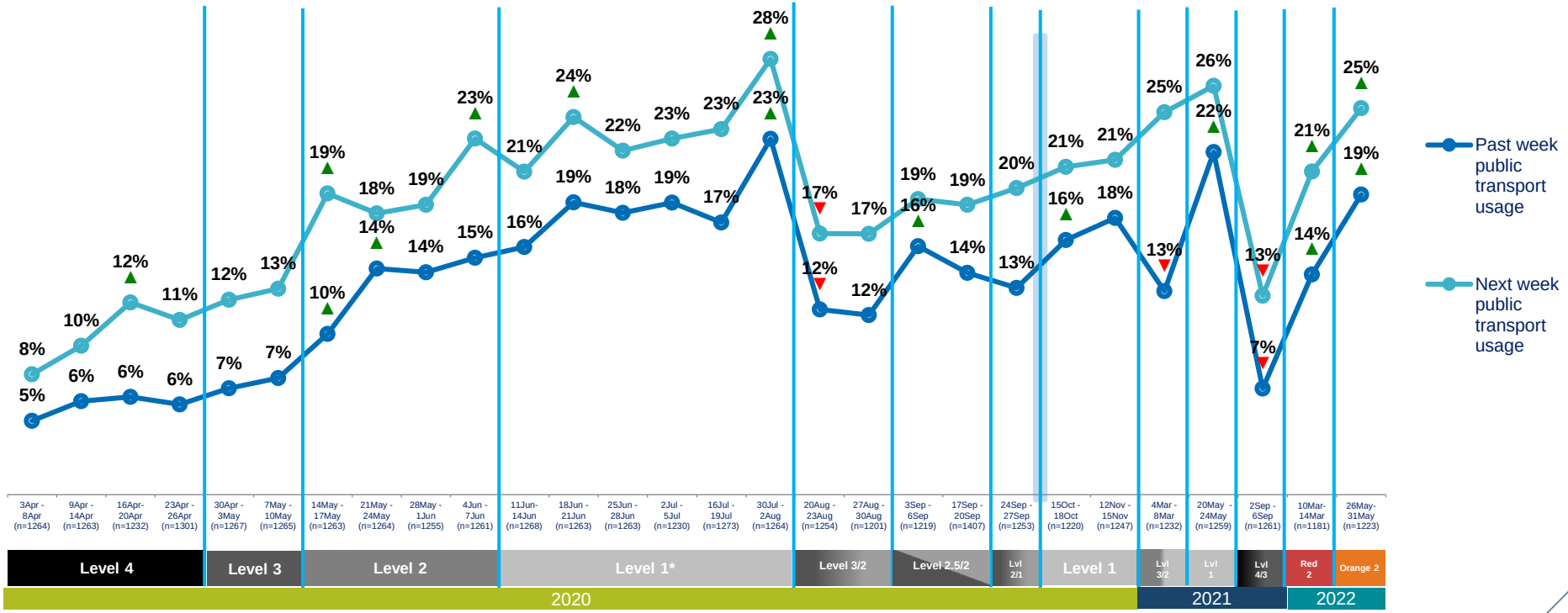
Changes in mode usage by wave



QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? *Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1-28 (n= between 1,181-1,407)*

Usage intent for public transport is comparable to a year ago, with a greater gap (6-points) between intent and usage in May 2022 compared to May 2021 (4-points)

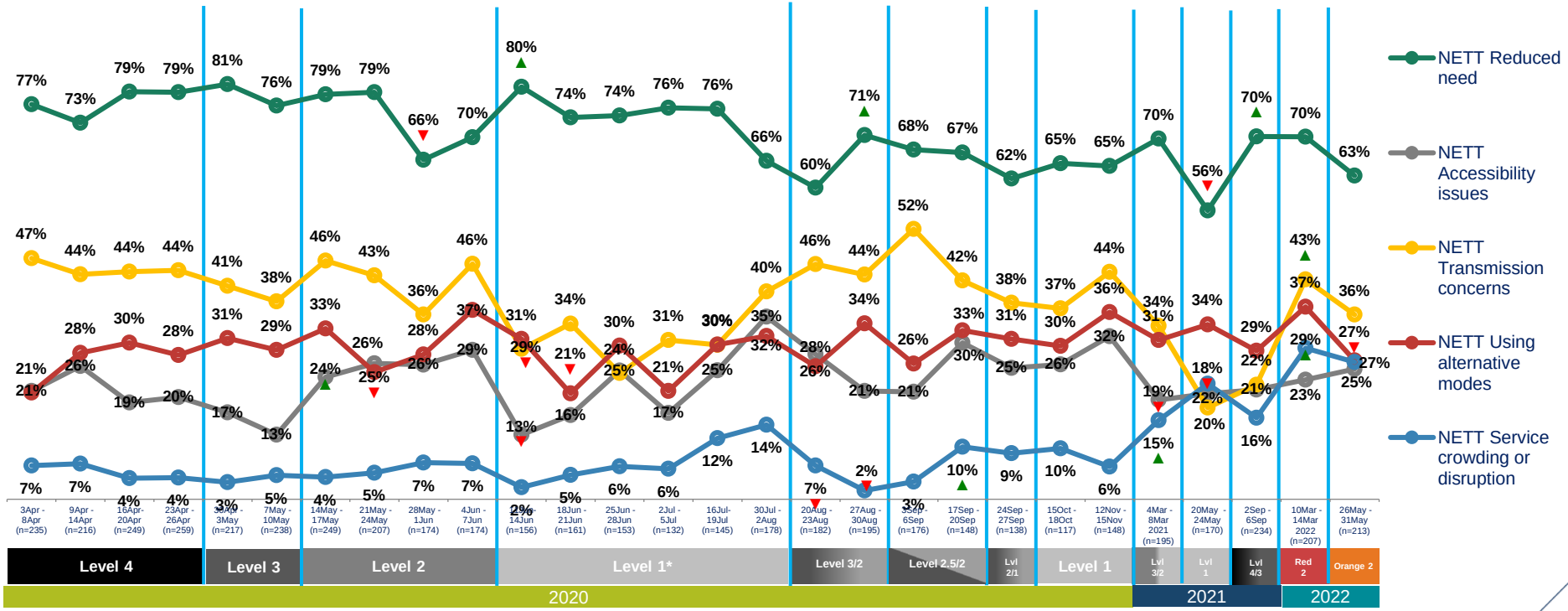
Changes in mode usage and intention by wave



QFREQ1/QFREQ2 – And in the course of a normal week, **on how many days** would you normally travel via each of the methods listed below? And during the past seven days, **on how many days** have you travelled via each of the modes listed below? *Base: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1-28 (n= between 1,181-1,407)*

There has been a directional decrease in most major themes cited, with the proportion of non-PT users who are using alternative modes down a significant 10 points

Reasons for decrease in PT activity



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

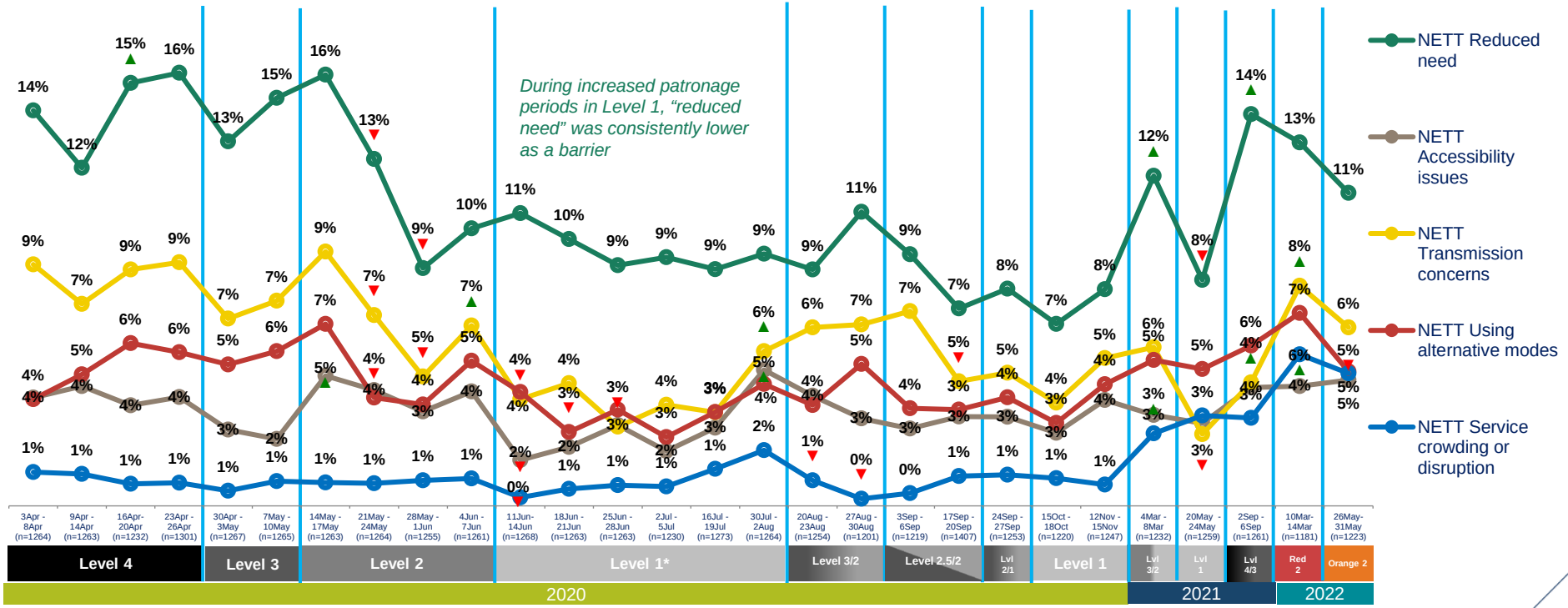
Base: all decreasing PT usage in past week compared to March 2020

▲ Indicates a statistically significant increase from previous time period

▼ Indicates a statistically significant decrease from previous time period

When viewed at a total population level, the same recent pattern of decline can be seen in most themes keeping people off services, with accessibility issues consistent

Reasons for decrease in PT activity – total population level

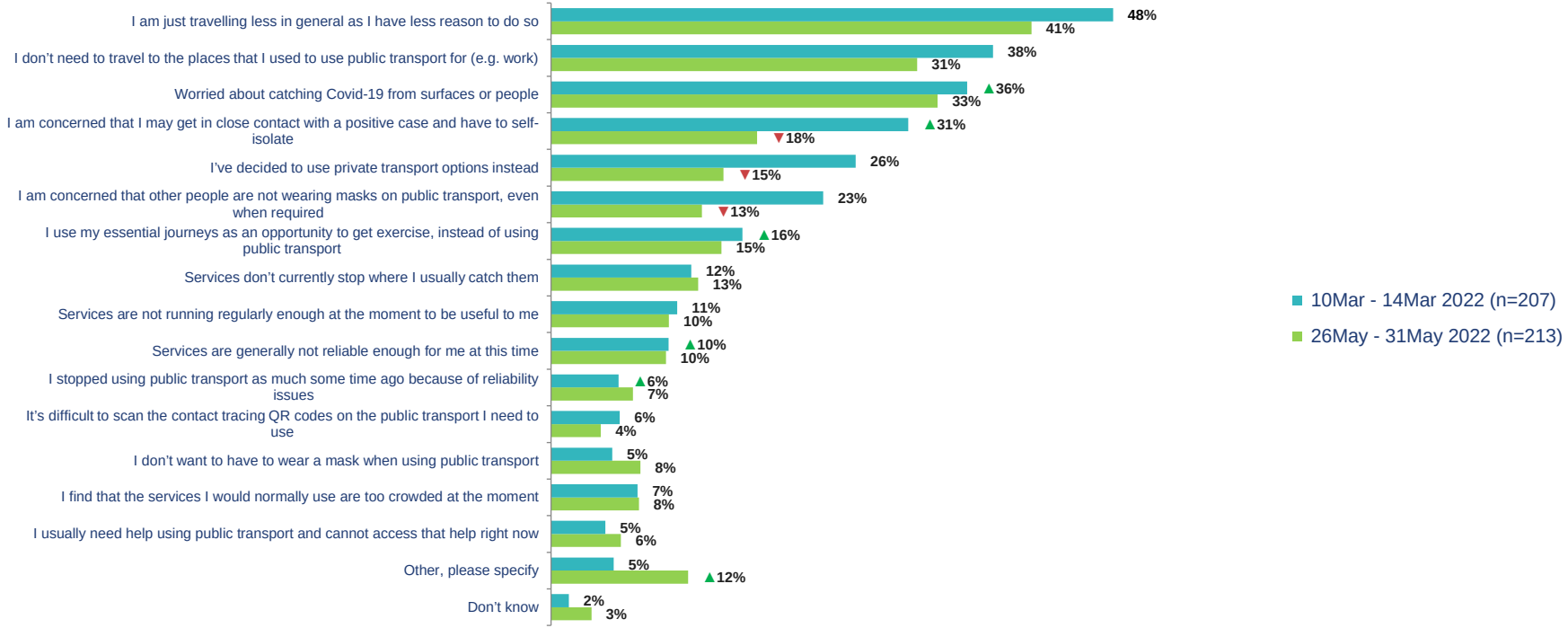


QDEC – For which, if any of the following reasons, has your use of public transport decreased?

Base: all decreasing PT usage in past week compared to March 2020

A lot of barriers are less common in May, with a 13-pt drop in close contact worries under Orange conditions and a 10-pt drop in worries about mask non-compliance

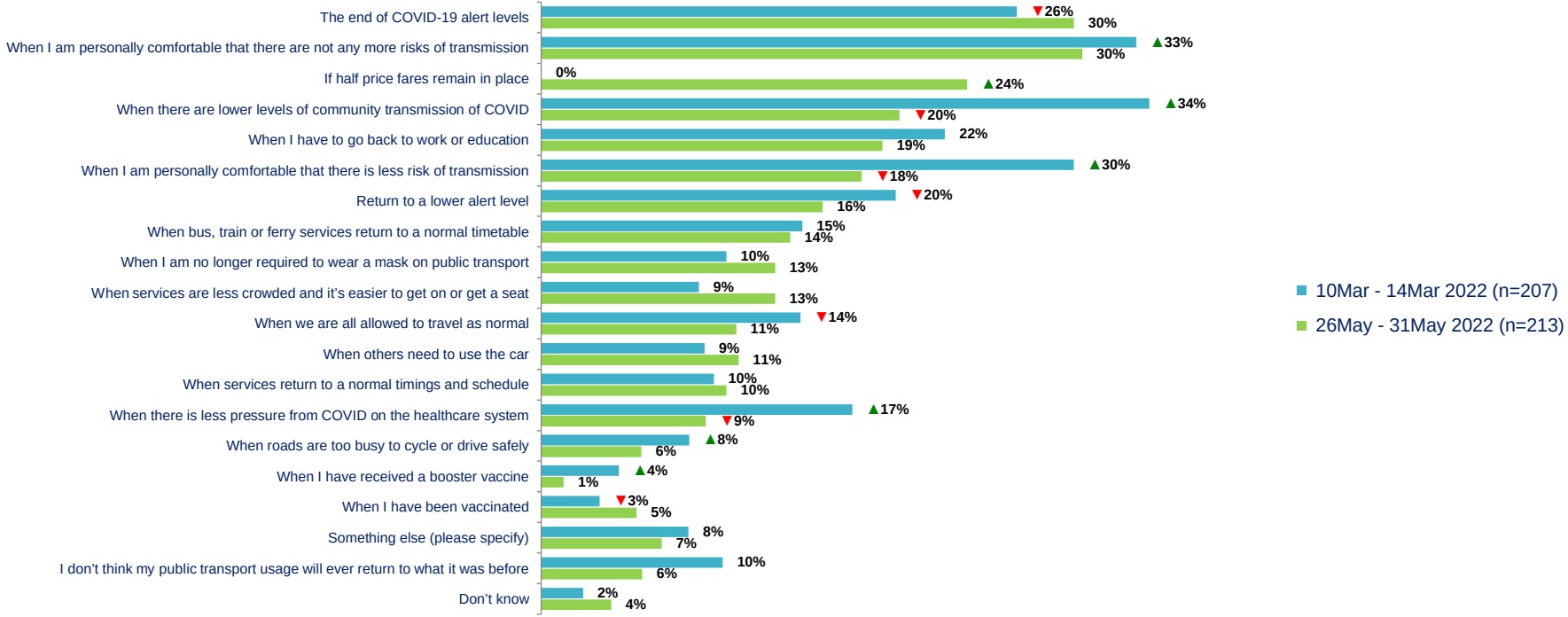
Reasons for decrease in PT activity



QDEC – For which, if any of the following reasons, has your use of public transport decreased?
Base: All who have decreased PT usage in past week compared to pre-lockdown frequency

A quarter say they'll increase their PT usage if half price fairs remain in place; there has been a 14-pt drop in those waiting for community transmission to lessen

Triggers for return to PT usage

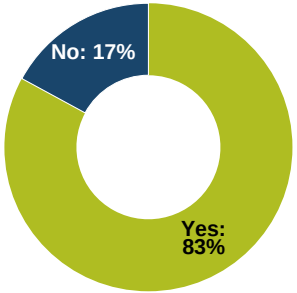


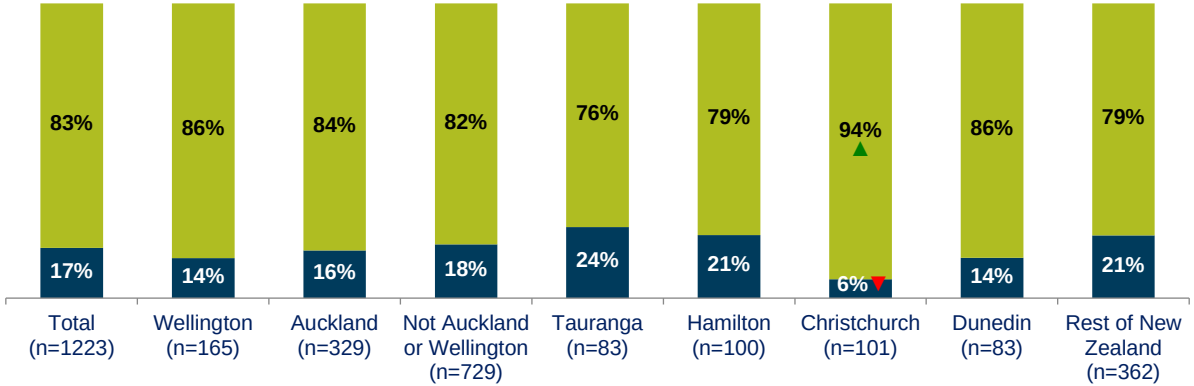
QDEC2 Which, if any of the following would encourage you to start using public transport as much as you used to?

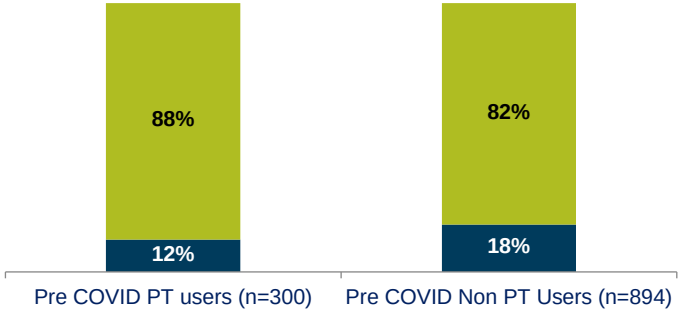
Base: All who have decreased PT usage in past week compared to pre-lockdown frequency

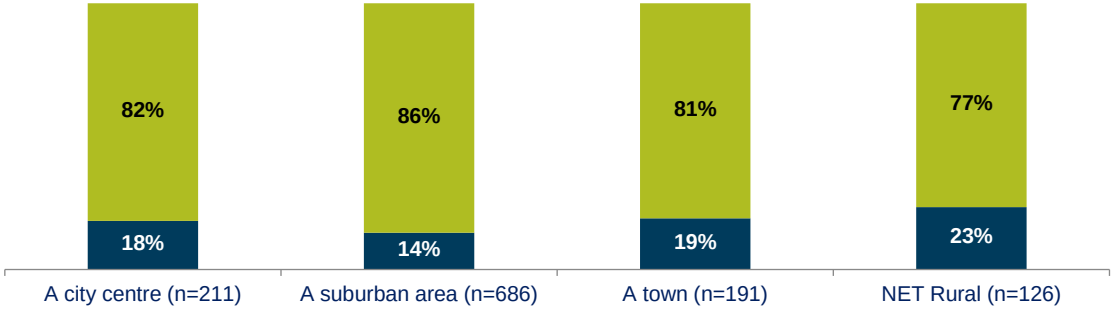
Awareness of half-price fares is universally high, but is slightly lower in rural areas where public transport patronage is not as common

Half-price fare awareness





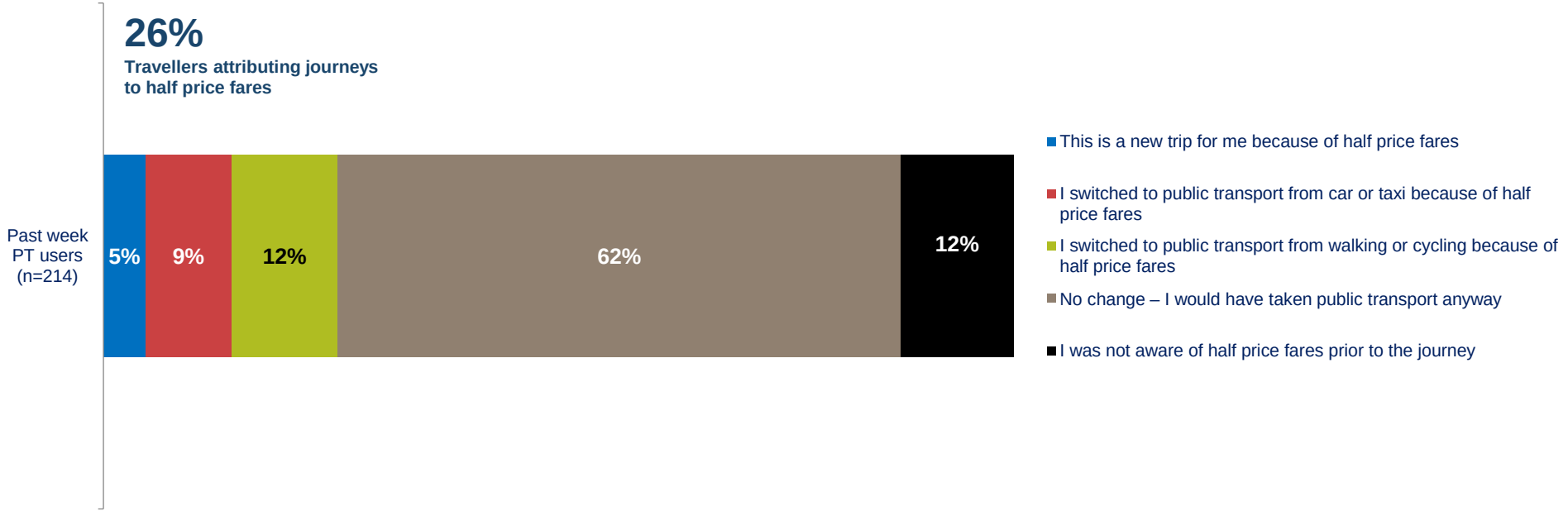




Q6 Are you aware that on 1 April 2022 half-price public transport fares were temporarily introduced nationwide?
Base: All new Zealanders 15+

More than a quarter of travellers have added PT journeys in the past week as a result of half-price fares, with around a tenth switching from private vehicle

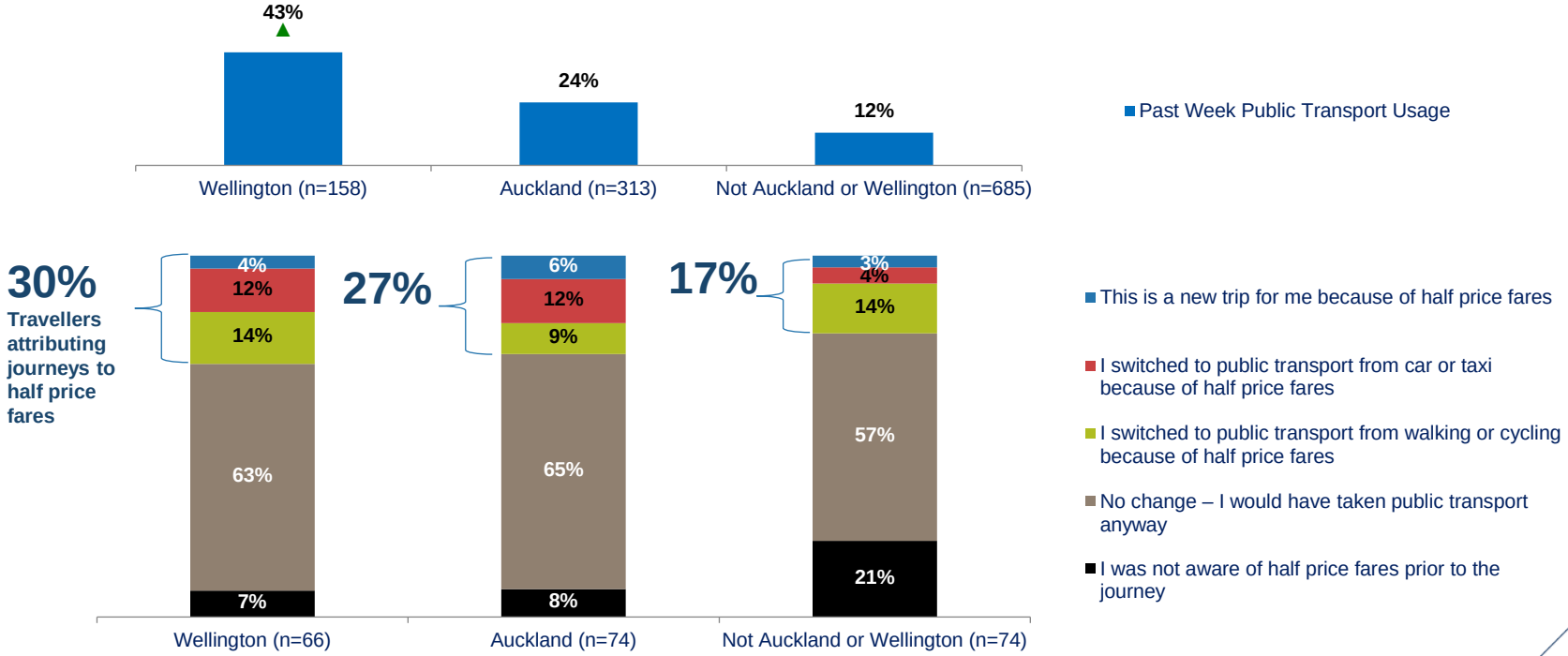
Half-price fare impact



Q53d2 You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)…
Base: All past week PT users

Around 3-in-10 travellers in Auckland and Wellington say they chose PT due to half-price fares, with Auckland seeing the greatest proportion of completely new travellers

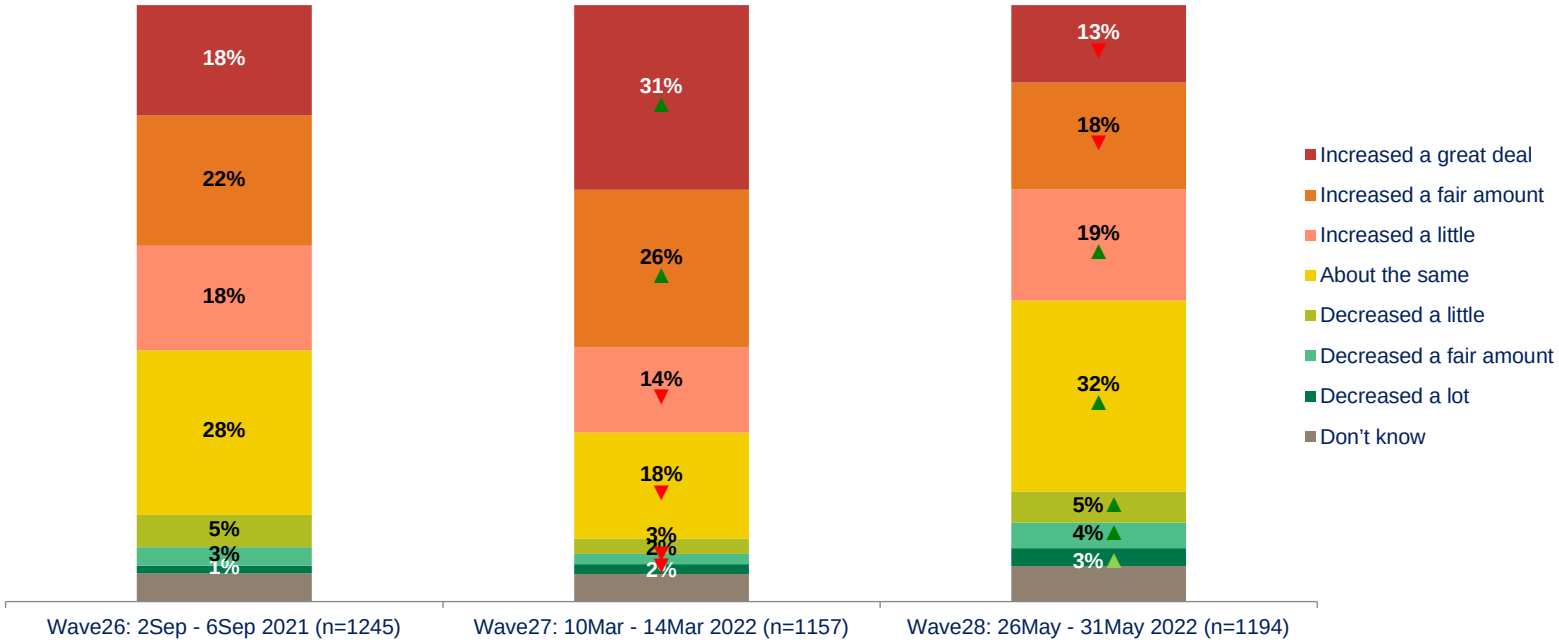
Half-price fare impact – areas with higher PT usage



Q53d2 You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)…
Base: All past week PT users in each region

Compared to March, significantly fewer people see an elevated risk from the Omicron variant when travelling on buses, trains and ferries

Perceived risk of Omicron and Delta outbreaks on public transport usage



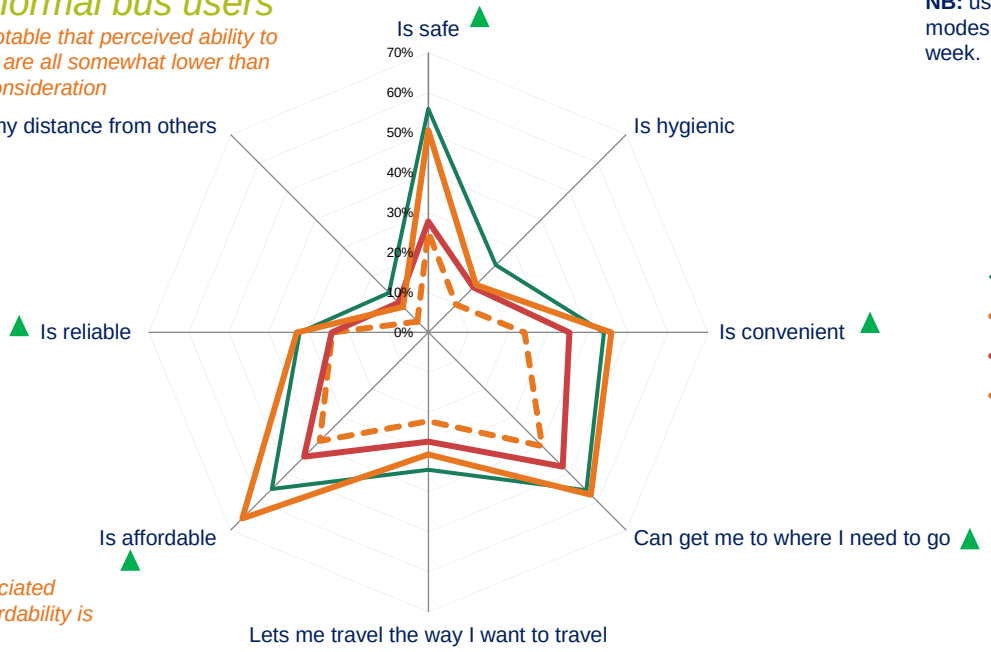
QPT3 - Compared to a previous COVID-19 outbreaks, to what extent do you currently feel that the risk of catching COVID-19 when travelling by public transport has increased, decreased or is it about the same?
Base: all adults 15+ in New Zealand

Among bus users, there has been a significant uplift in perceptions of services, now viewed as far more affordable, reliable and safe compared to March

Perceptions of the bus – normal bus users

While not statistically significant, it is notable that perceived ability to distance, safety and hygiene on buses are all somewhat lower than May 2021, when Omicron was not a consideration

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



Though a number of qualities are more associated than when last measured in March, only affordability is stronger than May 2021

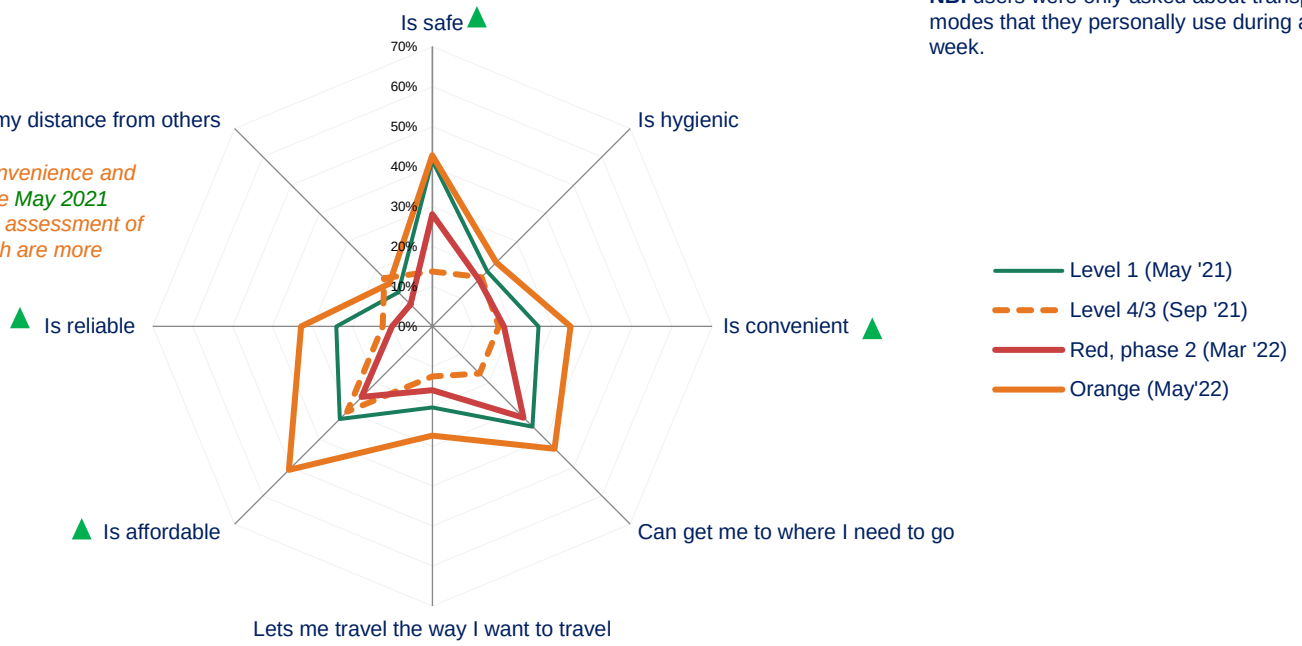
QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by bus normally: Level 1 May '21 (n=276), Level 4/3 Sep '21 (n=253), Red Phase 2 Mar '22 (n=257), Orange May '22 (n=273)

Train users were similarly more positive, with the proportion perceiving services as affordable, reliable or convenient all *doubling* since March

Perceptions of the train

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

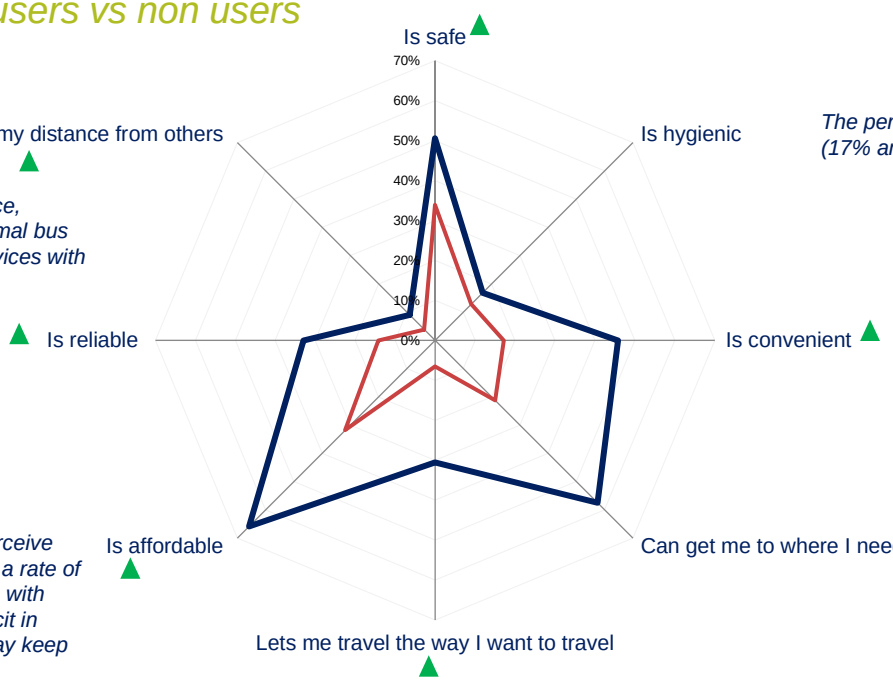
Whilst practical assessments like reliability convenience and affordability are all improved directionally since May 2021 there has not been significant improvement in assessment of trains for safety, hygiene and distancing, which are more salient when it comes to COVID transmission



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders who travel by train normally: Level 1 May '21 (n=125), Level 4/3 Sep '21 (n=113), Red Phase 2 Mar '22 (n=107) Orange May '22 (n=107)

The big differences between normal bus user perceptions and those of non-users are practical, which may limit the uplift in usage available from COVID reduction

Perceptions of the bus – users vs non users



The perceived difference in hygiene is only 4pts (17% among users, 14% among non users)

The perceived difference in ability to distance, though significant, is only 5 points, with normal bus users not particularly likely to associate services with this quality either

Habitual bus users are twice as likely to perceive buses as an affordable option right now, at a rate of 66% against just a third of non-users. Even with half-price fares in place, there is some deficit in perceived affordability of this option that may keep non-users from considering the service

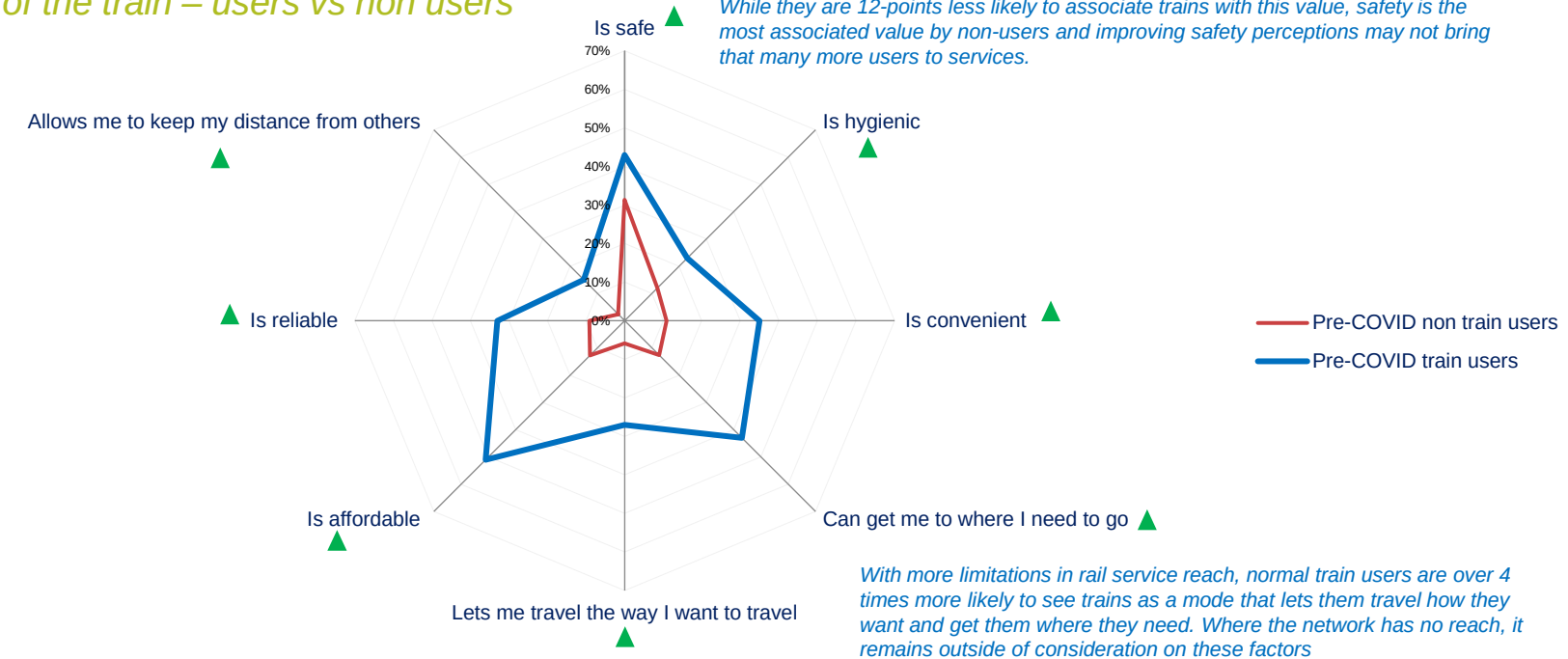
Non users are significantly less likely to say buses can get them where they need to go at a rate of 58% to 21% and this impracticality may keep them off services, even if transmission risks are lessened

QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders in May '22 who travel by bus normally (n=273); who do not travel by bus normally, but use other modes (n=921)

A similar pattern is clear when comparing train users and non users, with an even more significant deficit on practical considerations of the service

Perceptions of the train – users vs non users

While they are 12-points less likely to associate trains with this value, safety is the most associated value by non-users and improving safety perceptions may not bring that many more users to services.



With more limitations in rail service reach, normal train users are over 4 times more likely to see trains as a mode that lets them travel how they want and get them where they need. Where the network has no reach, it remains outside of consideration on these factors

QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders in May '22 who travel by train normally (n=107); who do not travel by bus normally, but use other modes (n=1,073)

Section 8 – Working from home

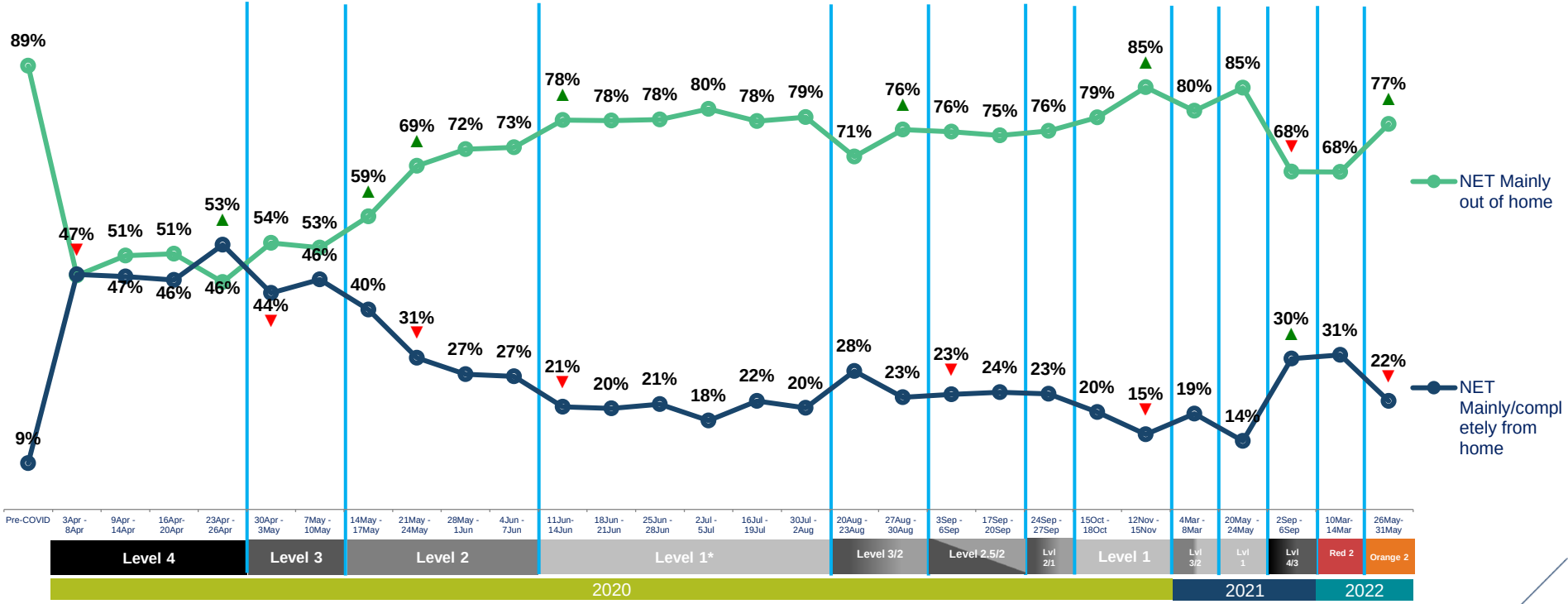
Key findings – working from home

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.
- At a total level, the proportion commuting for the majority of their work has increased significantly, having remained stable between September 2021 and March 2022.
- Between September and March, the proportion working each day increased, possibly because of relaxations in restrictions that meant those in industrial and service jobs were able to return to full time work under the red traffic light setting.
- Between March and May, there appears to have been more of a shift 'back to the office' with the proportion working on each day largely static, but a greater share of 'on-site' working at the expense of working from home each day.
- This might have benefitted the public transport network in particular: compared to March, commuters pre-COVID mode choices, hypothetical choices and actual choices appear much more closely aligned, with actual private vehicle usage no longer over-indexing quite as much against pre-COVID and hypothetical usage.
- Despite this, public transport remains the most impacted mode by working from home, with a quarter of traditional PT commuters working from home, compared to about one sixth of active mode or private vehicle commuters.

Working from home has declined significantly under Orange settings and is once again comparable to rates seen under alert Level 1

Proportion working in and out of home by survey wave

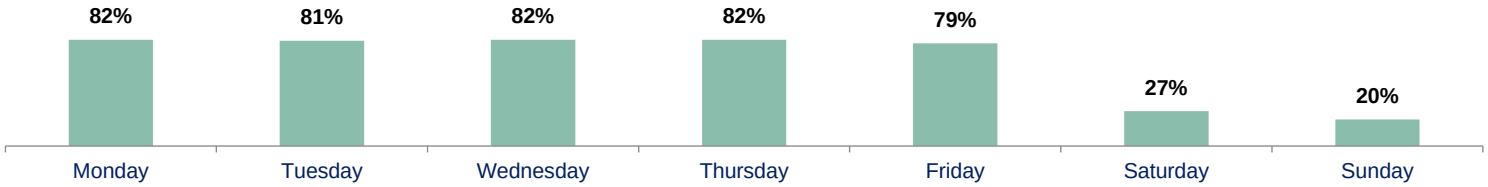


QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you *currently* work?

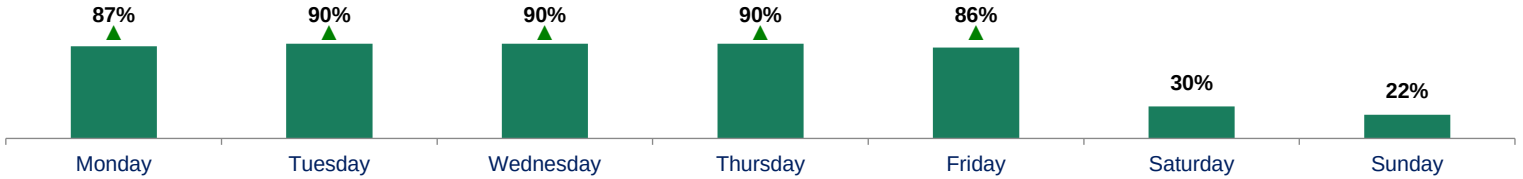
Base: all adults 15+ who are usually working

As in March, the proportion of the working population working each day of the week is higher than during the Delta outbreak

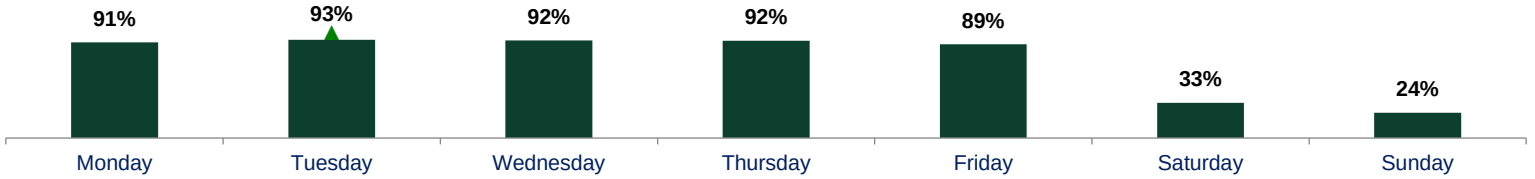
Proportion working on each day – September, Delta outbreak



Proportion working on each day – March, Omicron, Red Light Settings



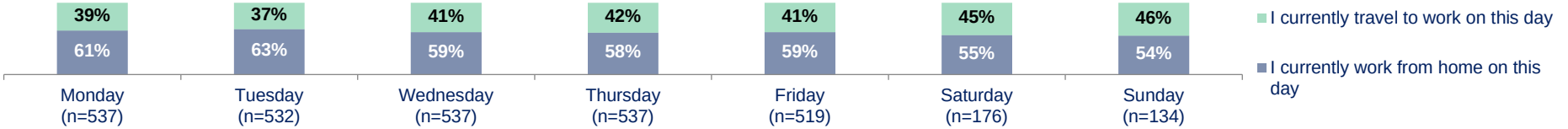
Proportion working on each day – May, Omicron, Orange light Settings



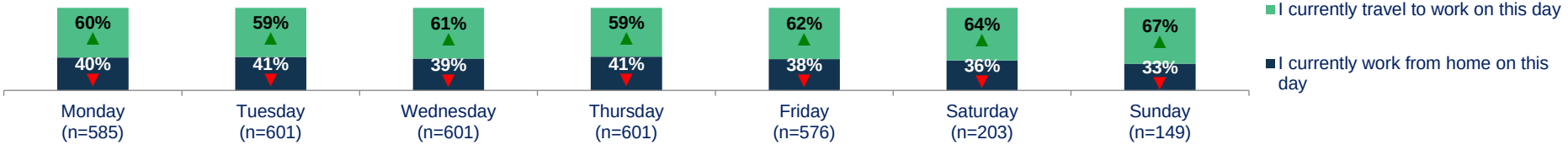
QWORK2E_NEW. Thinking about the last week, for each day, please state your current work travel arrangements:
Base: All working adults 15+ in New Zealand in wave 26 (2 Sep-6 Sep), wave 27 (10 Mar-14 Mar)

Between September and March, the decrease in working from home corresponded with many returning to work, May saw genuine shift back to the workplace

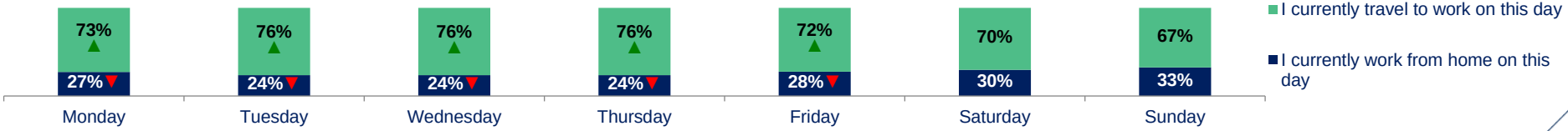
Share of workforce working from home on each day – September



Share of workforce working from home on each day – March



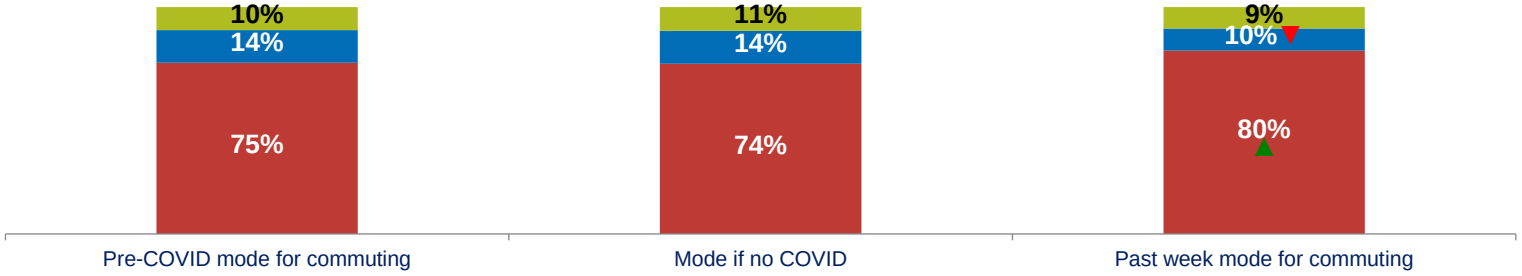
Share of workforce working from home on each day – May



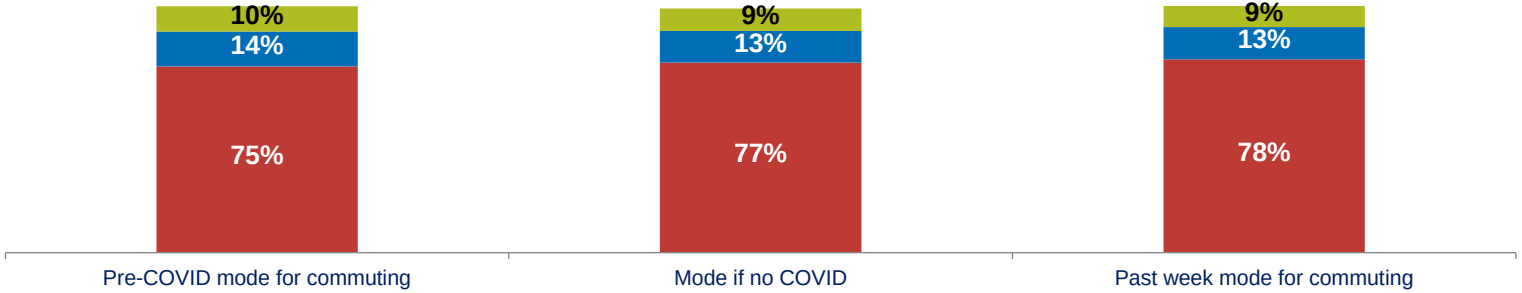
QWORK2E_NEW. Thinking about the last week, for each day, please state your current work travel arrangements:
Base: All working adults 15+ in New Zealand on each day of the preceding week in wave 26 (2 Sep-6 Sep);

PT commuting increased directionally by 3-pts and current commuting mode choices appear to closely reflect both preference and pre-COVID behaviour

Usual, ideal and actual mode used – March



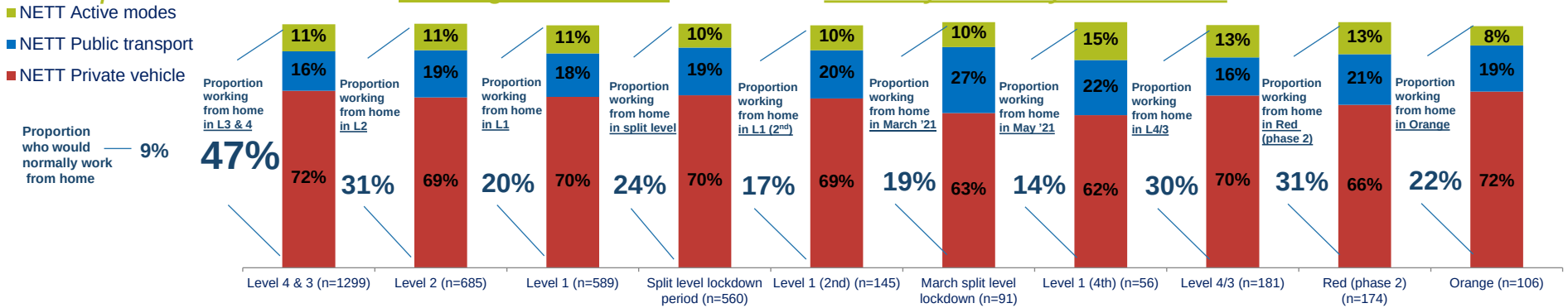
Usual, ideal and actual mode used – May



QMODE1 Thinking again about how you would normally travel within the course of a normal week in March 2020 (before the outbreak of COVID) how would you normally make each of the following types of journeys listed below? For each journey, please select the method of transport that makes up the majority of the journey. QMODE1B And how would you make each of these journeys today if COVID-19 did not exist?
QMODE2 Thinking again about the journeys you have taken outside of the home during the past seven days. How did you make each of the journeys listed below?
Base: all adults 15+ in New Zealand who travelled to work during the past week

While commuters of all modes are returning to the workplace, as many as 1-in-4 PT commuters are still staying 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%	24%	17%	19%	14%	30%	31%	22%
Within active mode commuters	53%	31% ▼	17% ▼	18%	12%	15%	13%	40% ▲	37%	16% ▼
Within private vehicle commuters	43%	25% ▼	13% ▼	16% ▲	11% ▼	13%	9%	25% ▲	25%	17% ▼
Within public transport commuters	62%	42% ▼	24% ▼	36% ▲	19% ▼	29%	15% ▼	49% ▲	43%	26% ▼

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 Active modes in L4&3 (n=292) / L2 (n=256) / L1 (n=402) / split level (n=324) 2nd L1 (n=141) / Feb (n=69) | Private vehicle L4&3 (1,748) / L2 (n=2,916) / split (n=2,390) / 2nd L1 (n=895) / Feb (n=464) | Public transport L4&3 (n=323) / L2(n=295) / L1(n=436) / split(n=314) / 2nd L1 (n=152) / Feb (n=83*) *low base, interpret with caution*

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