

Sentiment & Behaviour - September update

THE DEPARTMENT OF THE PRIME MINISTER AND CABINET

TRA

BACKGROUND

There is a need to understand ongoing sentiment and behaviours throughout the Covid response.

Due to the current COVID-19 outbreak, we have experienced a huge shift in lifestyle from our earlier July and May waves. There is a need to understand what concerns and needs New Zealanders have, and how best to address them. We see an increasing need to communicate the timeframe to our 'new normal'.

This report provides a check-in on overall sentiment and compliance behaviours of New Zealanders to inform communications, tone and messaging, and creative direction to help keep New Zealanders engaged with the collective mission to Unite Against COVID-19.

Overall objectives

Understand how to keep New Zealanders engaged with the collective mission - Unite Against COVID-19.

The specific number objectives we set out to answer this time:

1. **Explore the sentiment towards the COVID-19 response** – how are people feeling about COVID-19 personally, and how we are handling the response as a country
2. **Understand motivations for compliance** – what will keep people engaged overall and with specific actions they have been asked to do
3. **Information and influencers** – understand the effectiveness of information and the key sources of influence
4. **Brand effectiveness** – how is Unite Against COVID-19 performing as a brand, what are the strengths and areas of focus

Methodology

This survey interviewed a nationally representative sample of New Zealanders aged 16 years and over.

- n=846
- Margin of error at the 95% confidence interval is +/- 3.37%

Fieldwork ran from 9th to the 17th of September

Key samples:

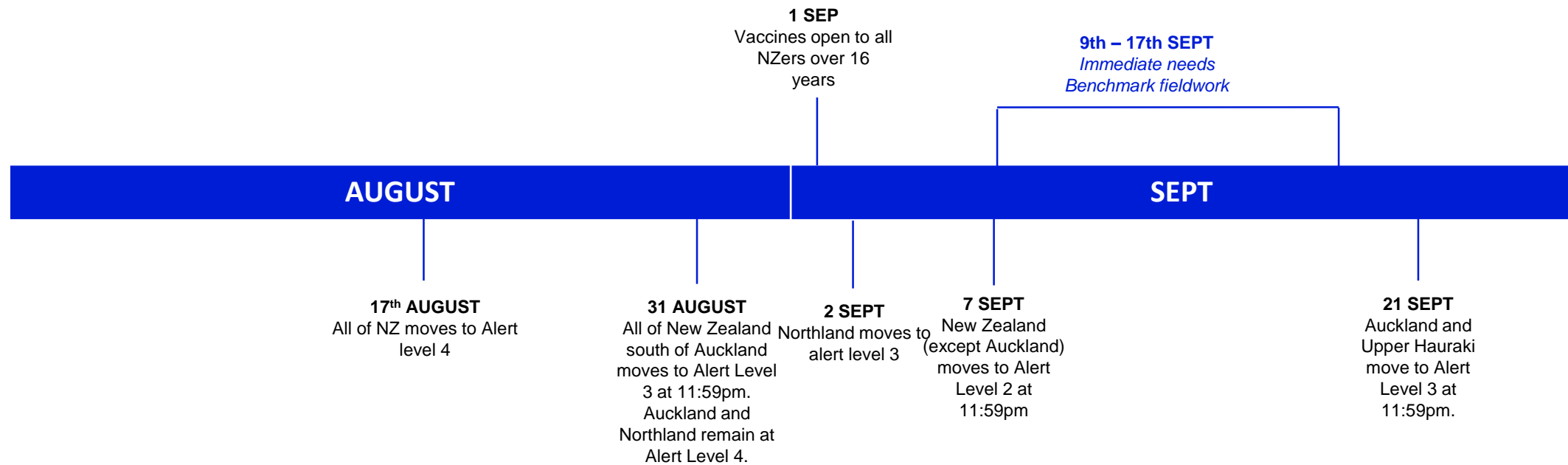
- Māori n=145
- Pasifika n=56

The data was post weighted to be representative of the New Zealand population, in terms of age, gender, region and ethnicity.

Throughout this report key comparisons are made to the May 2021 and July 2021 Benchmark studies.

It is important to note that this is an online survey – people who do not have access to the internet are not represented in our findings.

Timeline of key events



Agenda

1



**Understanding
the sentiment
towards COVID-19**

2



**Information
access and needs**

3



**Behaviour and
compliance**

4



Vaccine



Understanding the sentiment towards COVID-19

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SUMMARY

New Zealanders are still in support of the Government response to COVID-19 and believe our Alert Level settings are the best approach right now.

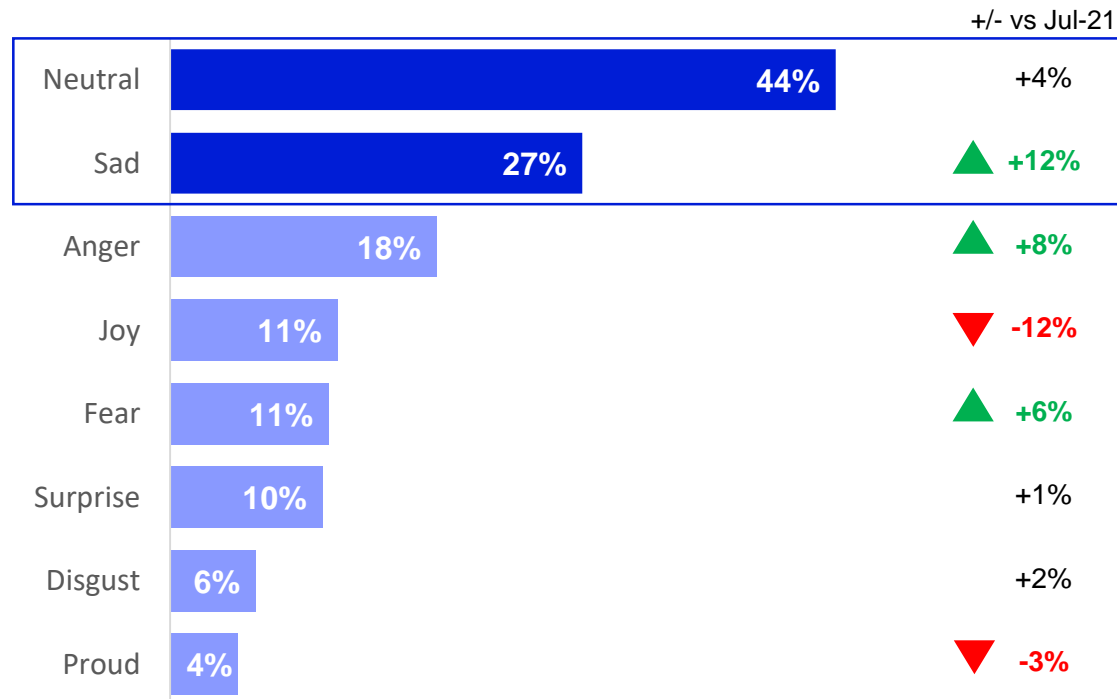
But fatigue is setting with the current COVID-19 situation and New Zealanders are becoming more concerned about the long-term impacts of COVID-19 on mental health, access to schooling, and general life progress.

There is also a growing pressure to open the borders and a greater expectation to know what the plan is for returning to a more 'normal' world.

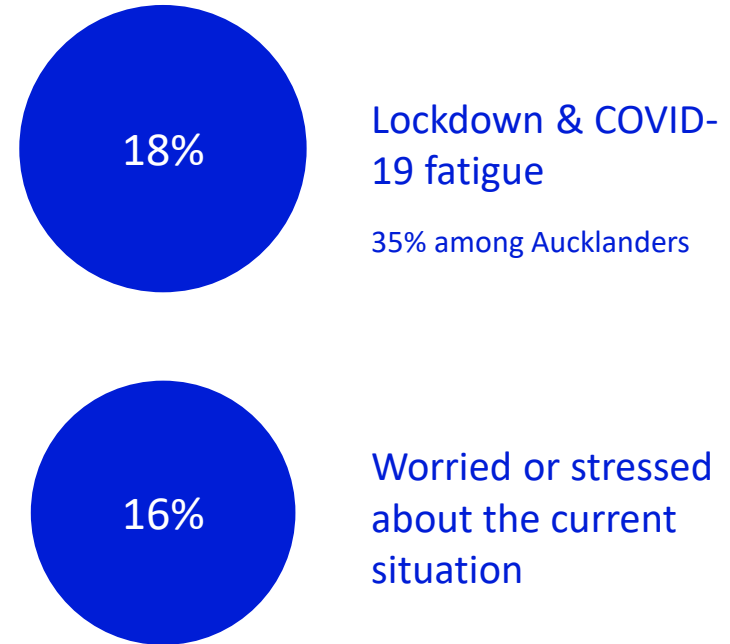
A feeling of fatigue is setting in towards the COVID-19 situation

Our dominant emotions are now 'neutral' and 'sad', as opposed to July and May when they were 'neutral' and 'joy'.

SENTIMENT TOWARDS THE COVID-19 SITUATION IN NZ



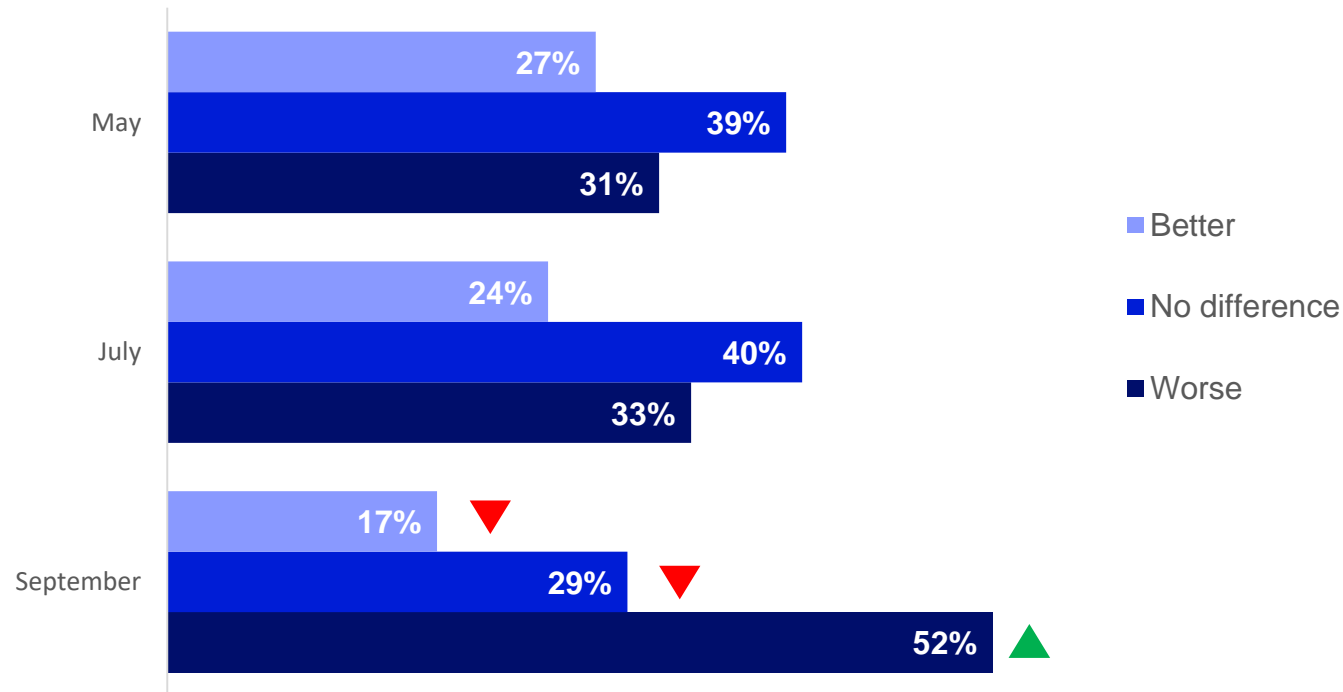
WHY IS THAT? – TOTAL SAMPLE



Source: Sentiment and Behaviours Benchmark (May 2021), Sentiment and Behaviours Dip 1 (July 2021), & Sentiment and Behaviours Dip 2 (September 2021)
 Q: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?
 Q: And why is that?
 Base: Sep-21 total sample n=846, July-21 total sample n=827, May-21 total sample n=1853

And there is a more pronounced feeling of life now being worse than before COVID-19



PERCEIVED DIFFERENCE IN LIFE COMPARED TO BEFORE COVID-19



Compared to earlier in the year, Aucklanders are less likely to say their life is better than before COVID-19 (22% vs 26%), however, this remains higher than the rest of NZ (14%).

Those who feel their life is worse are significantly **more likely to be 55 years and over (43%)** and significantly less likely to be under 35 (24%).

Source: Sentiment and Behaviours Benchmark (May 2021), Sentiment and Behaviours Dip 1 (July 2021), & Sentiment and Behaviours Dip 2 (September 2021)
 Q: How different do you feel your life is now, compared to before COVID-19
 Base: Sep-21 total sample n=846, July-21 total sample n=827, May-21 total sample n=1853
 CONFIDENTIAL @ TRA 2021

  Significantly higher / lower than July-21



Compared to July, we are more realistic that health behaviours will continue once majority are vaccinated


82%

 +7% from July-21

Believe that even when the majority are vaccinated, there will be a difference in life compared to pre COVID-19.

*This is comparable to May benchmark, at 83%.

FUTURE EXPECTATION OF COVID HEALTH BEHAVIOURS



		+/- vs July-21
I expect to continue to undertake health behaviours	45%	 +9%
I expect there will be some differences in day to day life compared to pre COVID-19	36%	-3%
I expect everything to be back normal (pre COVID-19)	12%	 -6%

Source: Sentiment and Behaviours Benchmark (May 2021), Sentiment and Behaviours Dip 1 (July 2021), & Sentiment and Behaviours Dip 2 (September 2021)

Q: What do you think life will be like in New Zealand once the majority of New Zealanders are vaccinated against COVID-19? Key: I expect to continue to undertake health behaviours - ie: scanning, wearing a mask on public transport

Base: Sep-21 total sample n=846, July-21 total sample n=827, May-21 total sample n=1853

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  Significantly higher / lower than July-21

TRA

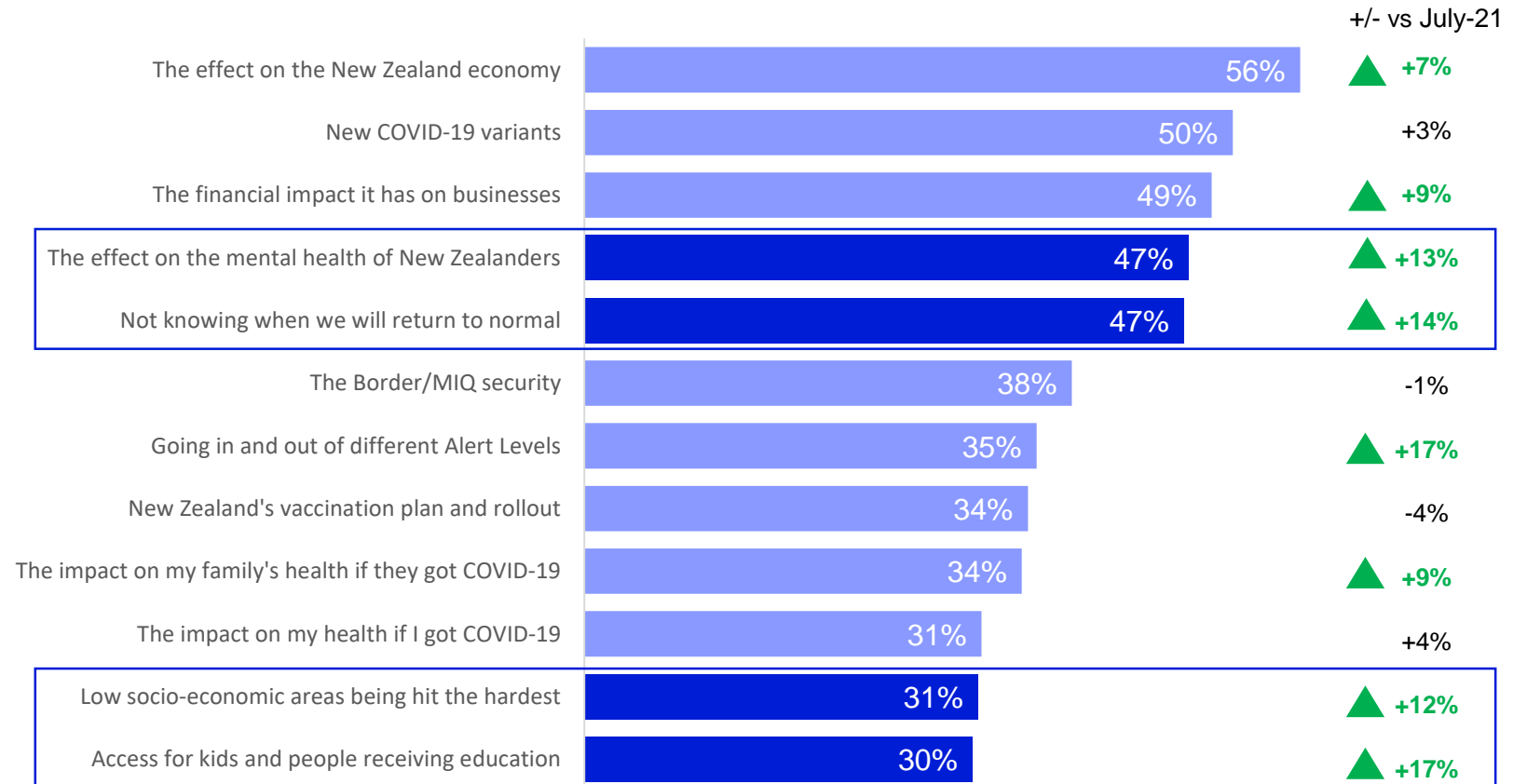
We are also realising the long-term effects of COVID-19, particularly the impact on wellbeing

Consistent with July, the **top concerns** are the effect of COVID-19 on the NZ economy, and New COVID-19 variants.

But there is now more concern with **long-term impacts** such as mental health, returning to normal, the welfare of low socio-economic areas, and poor access to education.

Overall, **we are more concerned** than we have been before, with the average number of concerns at 6.4 compared to 4.9 in both July and March.

TOP OF MIND IMPACTS OF COVID-19 ON NEW ZEALAND



Source: Sentiment and Behaviours Dip 1 (July 2021), & Sentiment and Behaviours Dip 2 (September 2021)
 Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
 Base: Sep-21 total sample n=846, July-21 total sample n=827

New Zealanders are concerned about when we will return to ‘normal’. Knowledge of the ‘Four-Phase plan’ helps alleviate this

We can see people are increasingly concerned about not knowing when we will return to ‘normal’.

47%

Of all New Zealanders are concerned with ‘not knowing when we will return to normal’.

Since July:

- +14% in concern
- +2 in rank

But when people are aware of the ‘Four-Phase plan’ (Reconnecting New Zealanders) they are significantly less concerned with the ‘return to normal’

33%

Of those New Zealanders aware of the ‘Four-Phase plan’ are concerned with our ‘**return to normal**’.

This is also significantly lower than those New Zealanders not aware of the ‘Four-phase’ plan (50%, -17%).

 -14% from total



These people are more likely to feel we’re heading in the right direction with handling COVID-19.

77%

Of those New Zealanders aware of the ‘Four-Phase plan’ feel we’re heading in the ‘**right direction**’

 +7% from total

Source: Sentiment and Behaviours Dip 1 (July 2021), & Sentiment and Behaviours Dip 2 (September 2021)

Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?

Q: Are you aware that a plan for reopening the New Zealand borders has been released?

Q: How do you feel the country is going with handling the impact of and response to COVID-19

Base: Sep-21 total sample n=846, July-21 total sample n=827, Aware of Four-Phase Plan n=185

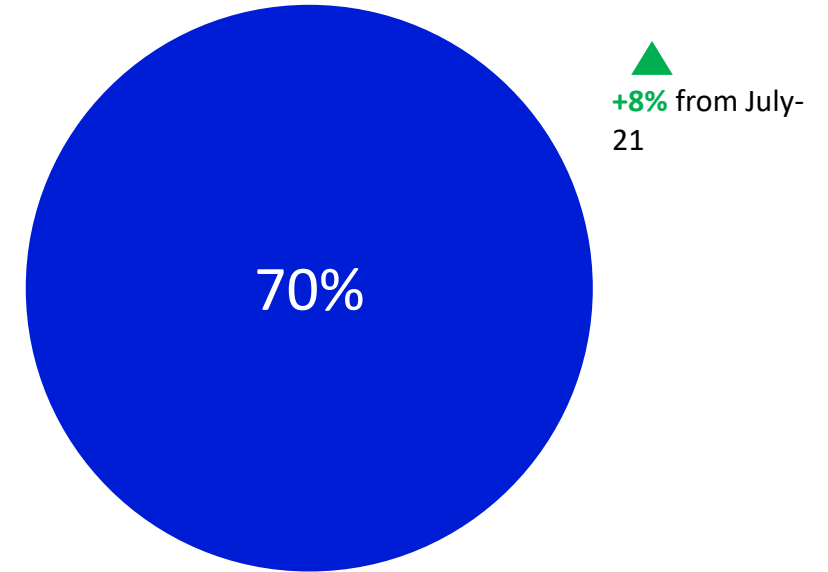


Significantly higher / lower than total sample September-21

Compared to July, we have stronger intentions to travel in the next 2 years.

Travel expectations indicate that people believe we'll be opening up in the next 1-2 years

OF THE 60% INTENDING TO TRAVEL OVERSEAS (EXCLUDING AUSTRALIA AND COOK ISLANDS)

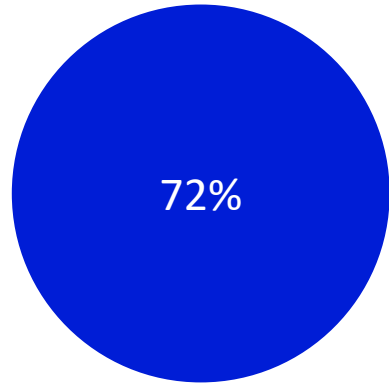


think their travel will be in the next 2 years.

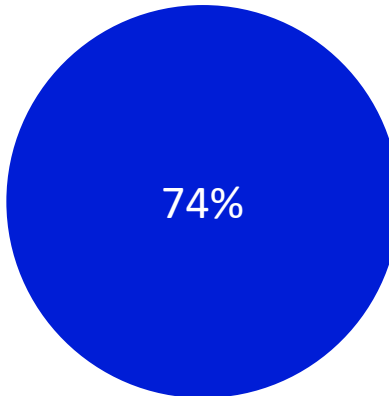
Source: Sentiment and Behaviours Dip 1 (July 2021), & Sentiment and Behaviours Dip 2 (September 2021)
Q: Do you plan on travelling to...? NET Intending to travel = in the next 3 months + in the next 6 months + in the next 12 months + in the next two years + after then
Base: Sep-21 total sample n=846, July-21 total sample n=827, May-21 total sample n=1853

Is this shift in sentiment impacting how New Zealanders feel about the response to, and handling of, COVID-19?

The majority of New Zealanders continue to support the response to COVID-19 and our current Alert Level settings

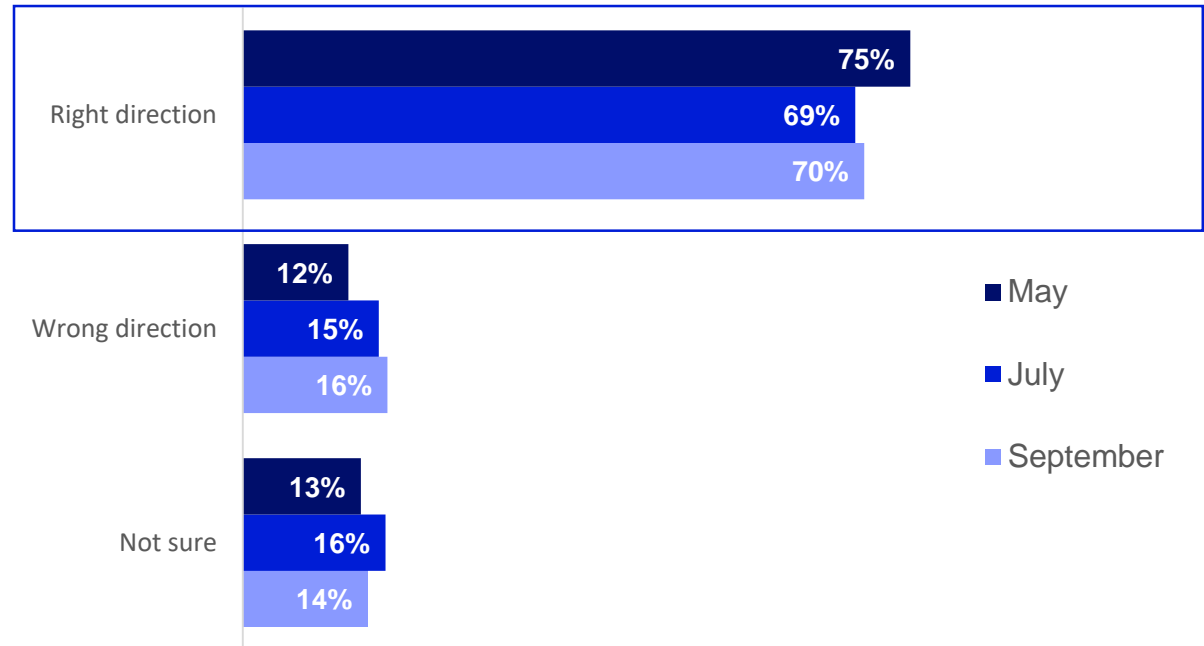


Agree that lockdowns are the best option to keep everyone safe



Agree that the different Alert Level settings around the country make sense

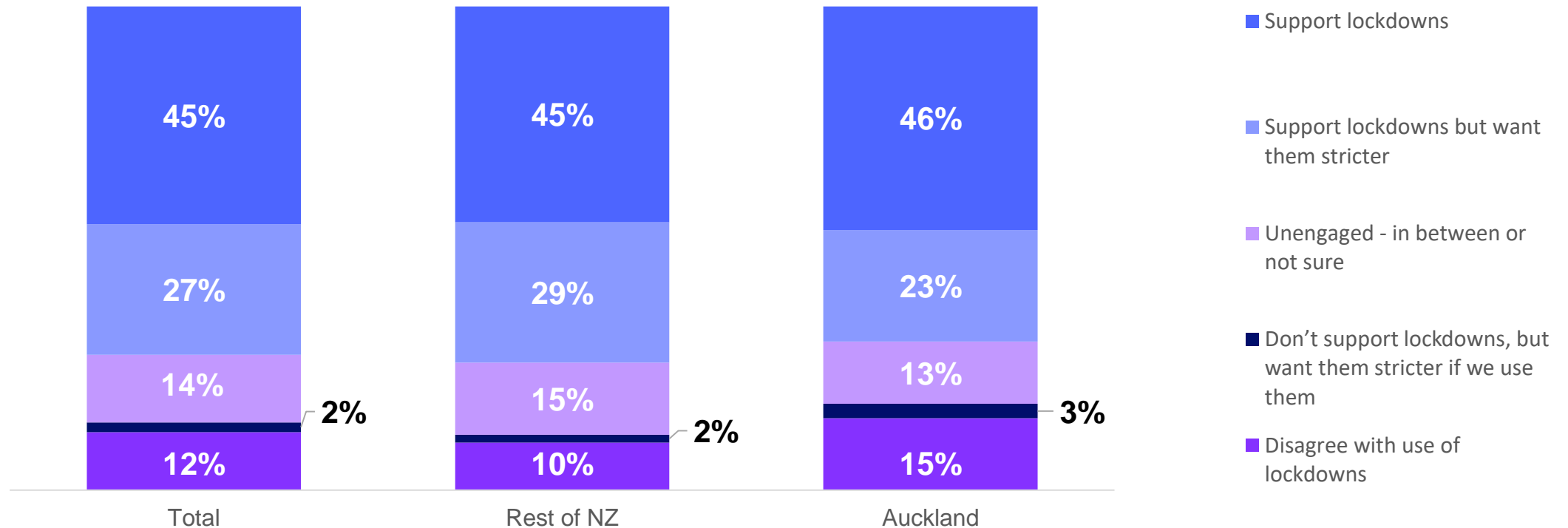
HOW DO YOU FEEL THE COUNTRY IS HANDLING THE IMPACT OF AND RESPONSE TO COVID-19?



Source: Sentiment and Behaviours Benchmark (May 2021), Sentiment and Behaviours Dip 1 (July 2021), & Sentiment and Behaviours Dip 2 (September 2021)
 Q: How do you feel the country is going with handling the impact of and response to COVID-19?
 Q: Here are something other people have said. To what extent do you agree or disagree? (NET Agree: Strongly agree + agree)
 Base: Sep-21 total sample n=846, July-21 total sample n=827, May-21 total sample n=1853

There is high support of lockdowns overall, but Aucklanders are less likely to support stricter lockdowns than RONZ

AGREEMENT TOWARDS USING LOCKDOWNS



Source: Sentiment and Behaviours Dip 2 (September 2021)

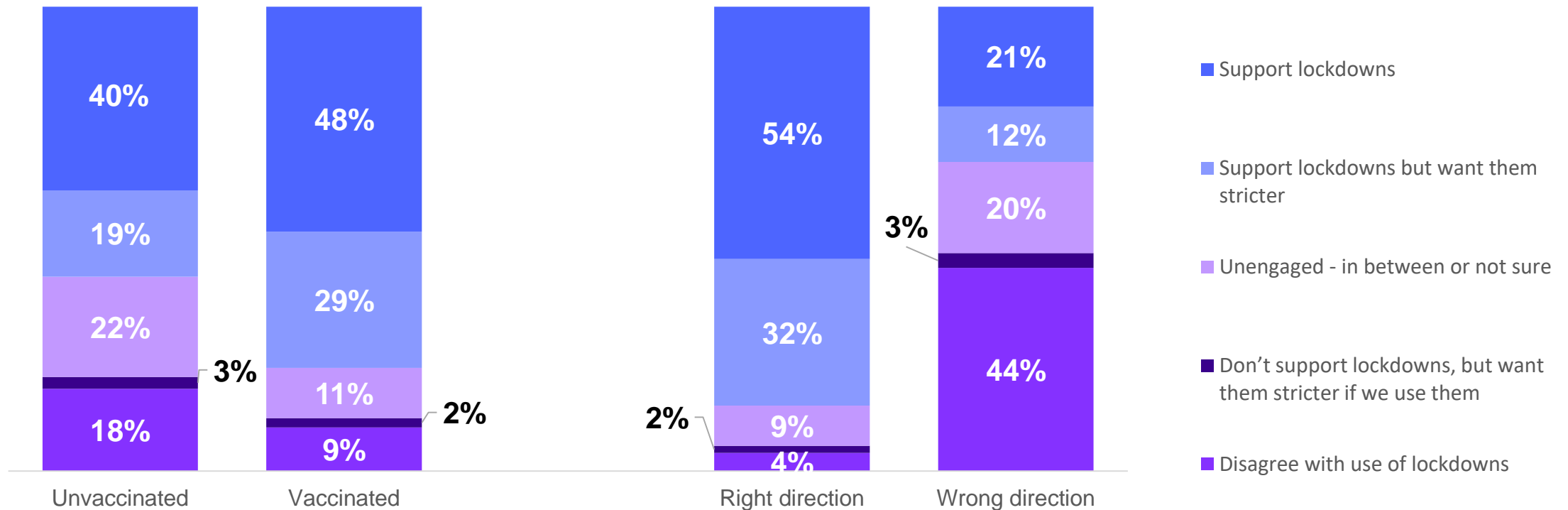
Q: Here are something other people have said. To what extent do you agree or disagree?

Key: Don't support lockdowns but want them stricter if we use them = NET Agree "Our lockdown settings should be more strict than they currently are" AND NOT NET Agree "lockdowns are our best option at this stage for keeping the country safe"; Support lockdowns but want them stricter = NET Agree "Our lockdown settings should be more strict..." AND NET Agree "lockdowns are our best option..."; Support lockdowns = NET Agree "lockdowns are our best option..." AND NOT NET Agree "Our lockdown settings should be more strict..."; Disagree with use of lockdowns = NET Disagree "lockdowns are our best option..."; Unengaged = In between + Not sure "lockdowns are our best option at this stage"

Base: Sep-21 total sample n=846, Rest of New Zealand n=540, Auckland n=306

Those who think we're going in the wrong direction also disagree with the use of lockdowns

AGREEMENT TOWARDS USING LOCKDOWNS



Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Here are something other people have said. To what extent do you agree or disagree?

Key: Don't support lockdowns, but want them stricter if we use them = NET Agree "Our lockdown settings should be more strict than they currently are" AND NOT NET Agree "lockdowns are our best option at this stage for keeping the country safe"; Support lockdowns but want them stricter = NET Agree "Our lockdown settings should be more strict..." AND NET Agree "lockdowns are our best option..."; Support lockdowns = NET Agree "lockdowns are our best option..." AND NOT NET Agree "Our lockdown settings should be more strict..."; Disagree with use of lockdowns = NET Disagree "lockdowns are our best option..."; Unengaged = In between + Not sure "lockdowns are our best option at this stage"

Base: Sep-21 total sample n=846, Unvaccinated n=220, Vaccinated n=595, Right direction n=579, Wrong direction n=139

IMPLICATION

New Zealanders are looking for guidance out of the current situation

While people still believe that lockdown and the Alert Level settings are our best response right now, they are looking ahead for guidance on when things will open up and return to 'normal'.

Information access and needs

2

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SUMMARY

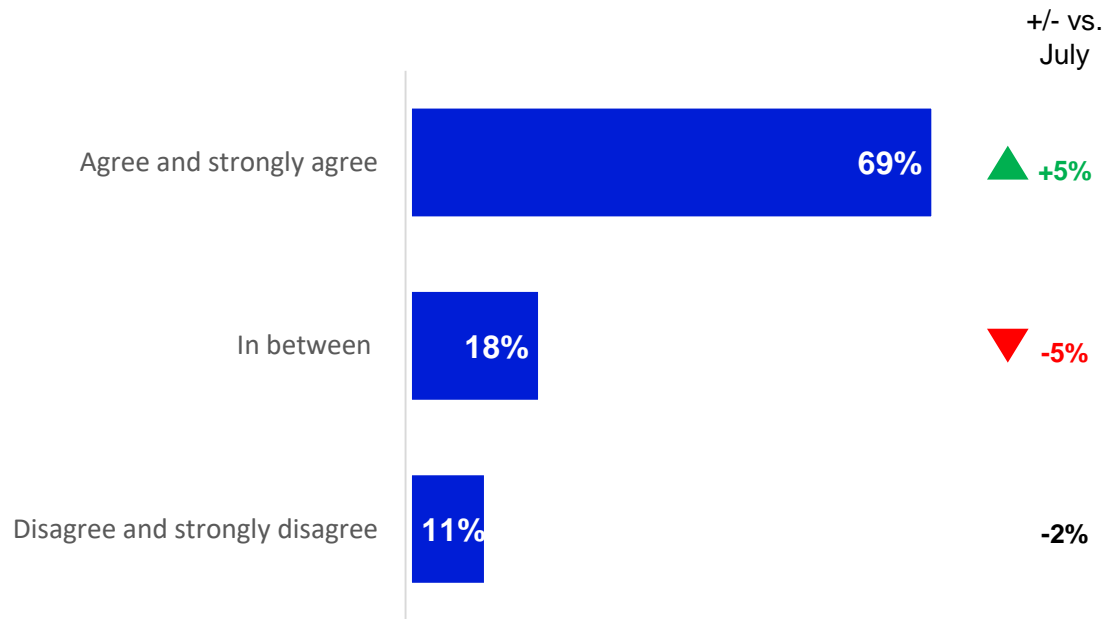
The information going out to the public is consistently good and meets the needs of the majority of New Zealanders.

However, for those who don't support lockdown, they would like more information or clarity on timeframes for re-opening / returning to 'normal'.

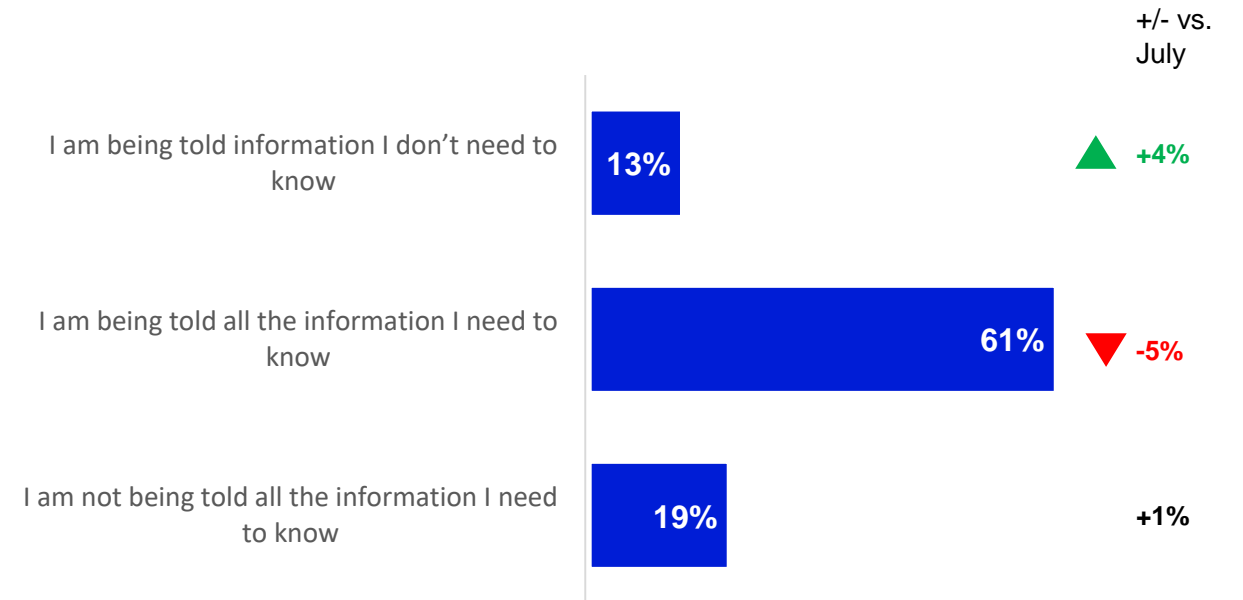
Information access and quality is meeting New Zealanders' needs consistently

But there is a slight growth in those who feel they're being told information they 'don't need to know' – this group is significantly more likely to be male, Māori and Pasifika

HAVE ACCESS TO THE INFORMATION YOU WANT AND NEED ABOUT COVID-19



INFORMATION QUALITY



Source: Sentiment & Behaviours Dip 1 (July 2021), & Sentiment & Behaviours Dip 2 (September 2021)
 Q: How do you feel about the quality of information about COVID-19 that is currently being provided on what you need to do?
 Q: From everything you've seen or heard about COVID-19 do you agree that you have access to all the information you want and need?
 Base: Sep-21 total sample n=846, July-21 total sample n=827

Significantly higher / lower than July-21

The top information sources and influencers are consistent with July and May measures

TOP INFORMATION SOURCES

**Government and Healthcare Professional Sources (87%),
Other Sources (79%)**

Media Briefings (60%)
+2 in rank from July, **+18%** from July

Articles in the news and media (57%)
-1 in rank from July, **+9%** from July

COVID-19 advertising (51%)
-1 in rank from July, **+8%** from July

COVID-19 website (43%)
= in rank from July, **+8%** from July

TOP INFLUENCERS

Ashley Bloomfield (63%)
= in rank from July, **+5%** from July

Jacinda Ardern (60%)
= in rank from July, **+15%** from July

Chris Hipkins (39%)
= in rank from July, +1% from July

Ministry of Health (36%)
= in rank from July, no change from July

Source: Sentiment & Behaviours Dip 1 (July 2021), & Sentiment & Behaviours Dip 2 (September 2021)

Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, and the COVID-19 vaccine?

Q: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?

Base: Sep-21 total sample n=846, July-21 total sample n=827

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Significantly **higher** / **lower** than July-21

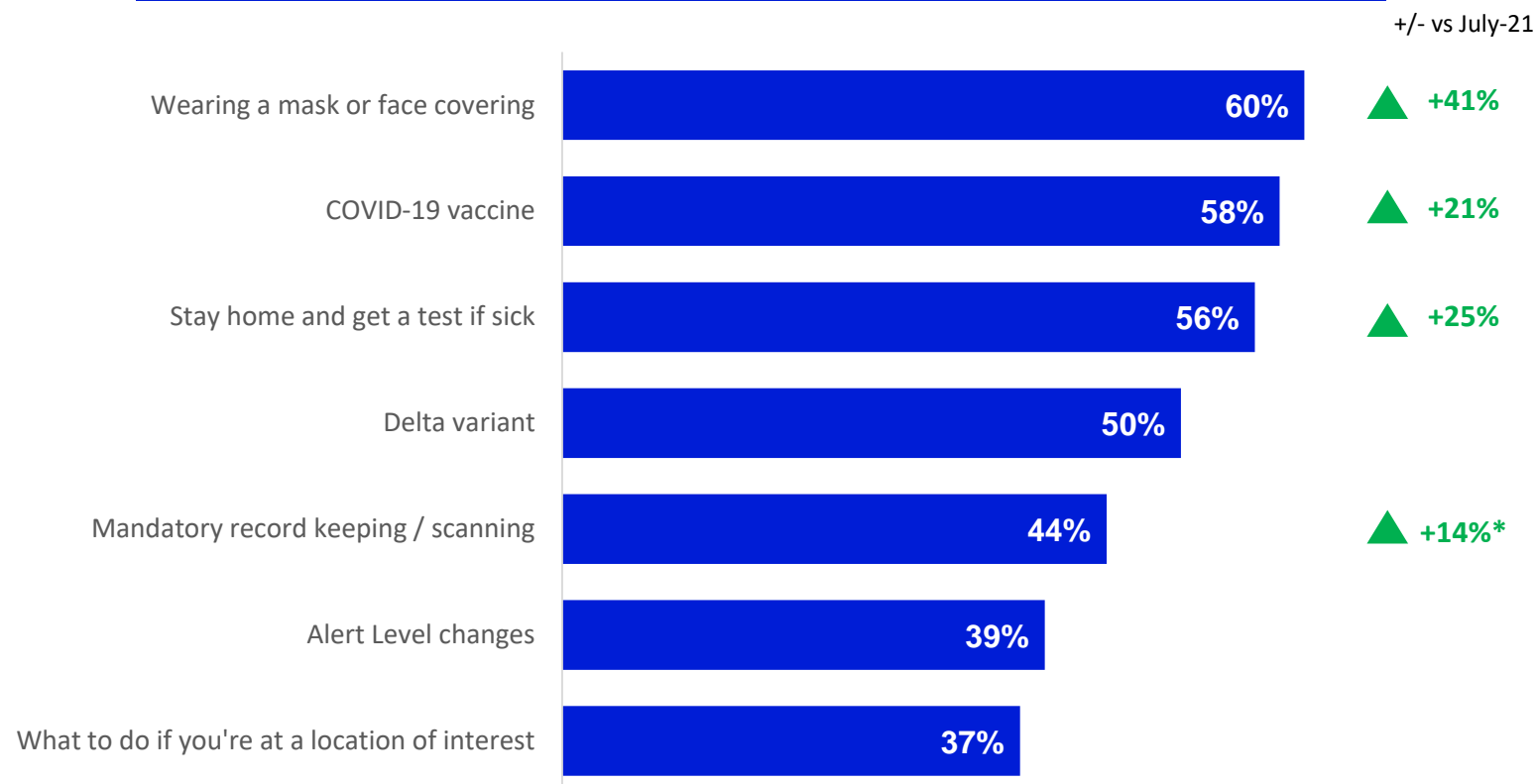
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The current context is driving higher awareness of the most relevant messages

The current outbreak and introduction of new mandatory mask usage has seen some significant uplifts in relevant messaging awareness, compared to July levels.

Messages that New Zealanders are not hearing as much are "plans to re-open the New Zealand border" (8%), "other variants" (11%), "quarantine free travel" (20%) and "MIQ places and facilities" (24%).

MESSAGES – SEE OR HEAR ABOUT IT ALL THE TIME



Source: Sentiment & Behaviours Dip 1 (July 2021), & Sentiment & Behaviours Dip 2 (September 2021)

Q: Lately, how much are you seeing or hearing about ... (See or hear about it all the time)

*Indicative only due to a change in wording. July 2021 "The NZ COVID Tracer App"

Base: Sep-21 total sample n=846, July-21 total sample n=827

When it comes to the 'Four-Phase plan', both awareness and familiarity are lacking

Future overseas travel policies are most strongly associated with the 'Four-Phase plan', while vaccine passports have a weaker association

AWARENESS AND FAMILIARITY WITH FOUR-PHASE PLAN – TOTAL SAMPLE

22%

Are aware of the 'Four-Phase plan'

13%

Are familiar with the plan

Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Are you aware of that a four-phase plan for reopening the New Zealand borders has been released?

Q: How familiar are you with this plan?

Q: What do you understand is in this plan?

Base: Sep-21 total sample n=846

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AWARENESS OF PLAN COMPONENTS

TOTAL

Eventually opening Quarantine Free Travel for all vaccinated travellers	64%
Creating new travel pathways to New Zealand based on the COVID-19 risk of the country of origin	52%
Vaccinations available to all eligible New Zealanders	44%
14 day's MIQ for the majority of unvaccinated travellers	42%
Testing at the border and public health measures like QR scanning still in place	39%
Introducing vaccine passports	32%

Since July, the UAC Brand is significantly more associated with ‘is everywhere’, ‘Trusted’ and ‘is making a difference’

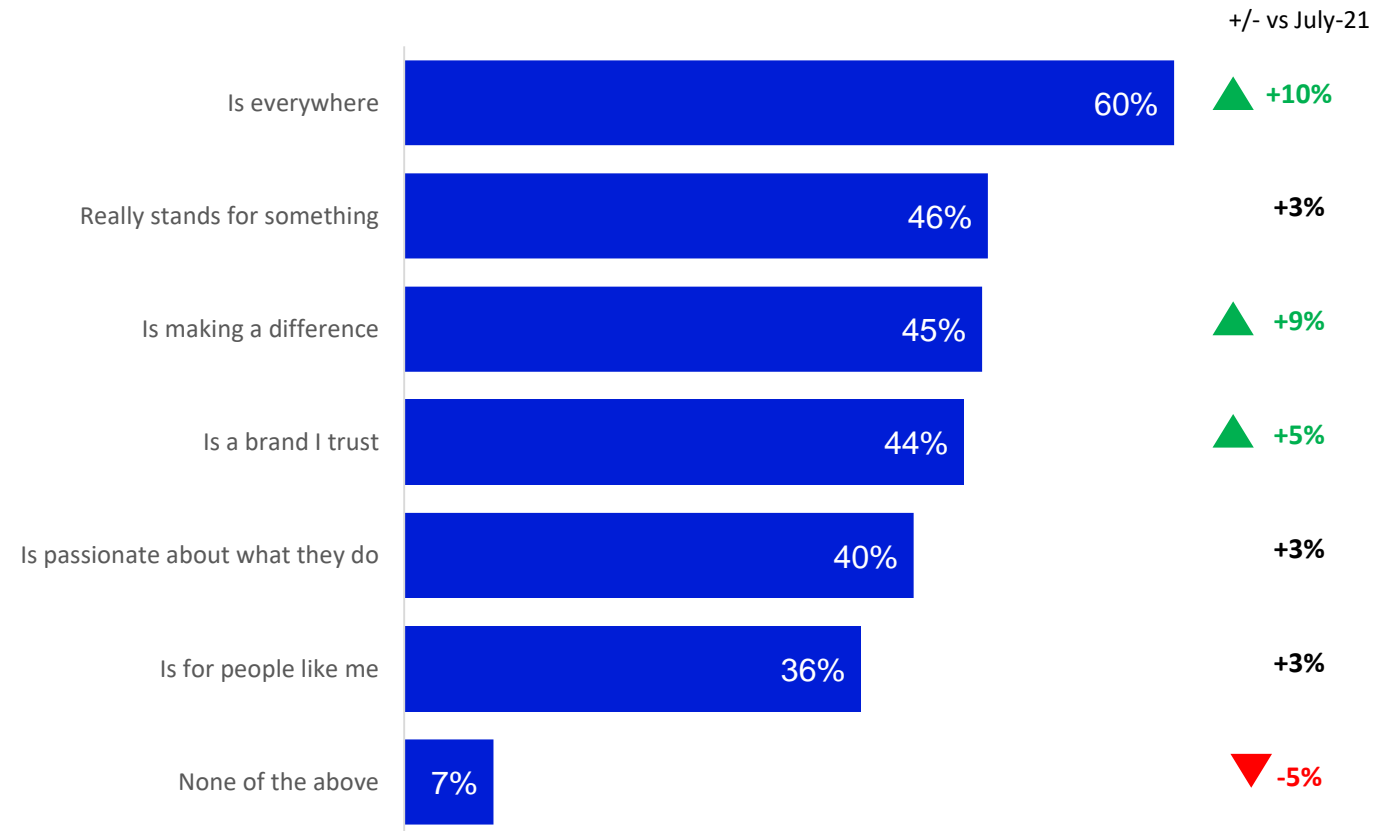
ASSOCIATIONS WITH THE ‘UNITE AGAINST COVID-19’ BRAND

21% of New Zealanders associate the UAC brand with **all** metrics.

Since July, we have seen a significant uplift in Trust for:

- 35-54 years (48%, +9% from July)
- 55 years and over (45%, +6% from July)
- Females (45%, +6% from July)

And we have seen a significant decline in Trust for Pasifka (29%, -11% from July)



Source: Sentiment & Behaviours Dip 1 (July 2021), & Sentiment & Behaviours Dip 2 (September 2021)

Q: Do you feel that Unite Against COVID-19 is ...

Base: Sep-21 total sample n=846, July-21 total sample n=827

For those who don't support lockdown, clarity around the timeframe for reopening is needed

Don't support
lockdown – 12%

Those not in support of lockdown, more likely to be males and live in Auckland.
They want more freedom and for the borders to open.
They also want to stop using lockdowns regardless of vaccination rate.



The 'Four-Phase plan' will be important to provide them sense of progress and clarity around the timeframe around reopening, as currently almost half of this group feel they "hardly ever hear" messaging around 'plans to re-open the border.'

Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Here are something other people have said. To what extent do you agree or disagree?

Don't support lockdowns = disagree + strongly disagree that 'lockdowns are our best option to keep the country safe'

Base: Sep-21 total sample n=846, Don't support lockdowns n=98

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Significantly **higher** / **lower** than total

TRA

A large, stylized white number '3' is positioned in the upper left quadrant of the image. The background is a deep blue with a white diagonal line that runs from the top left towards the bottom right, creating a sense of movement and depth. The number '3' is bold and has a slight shadow effect.

3

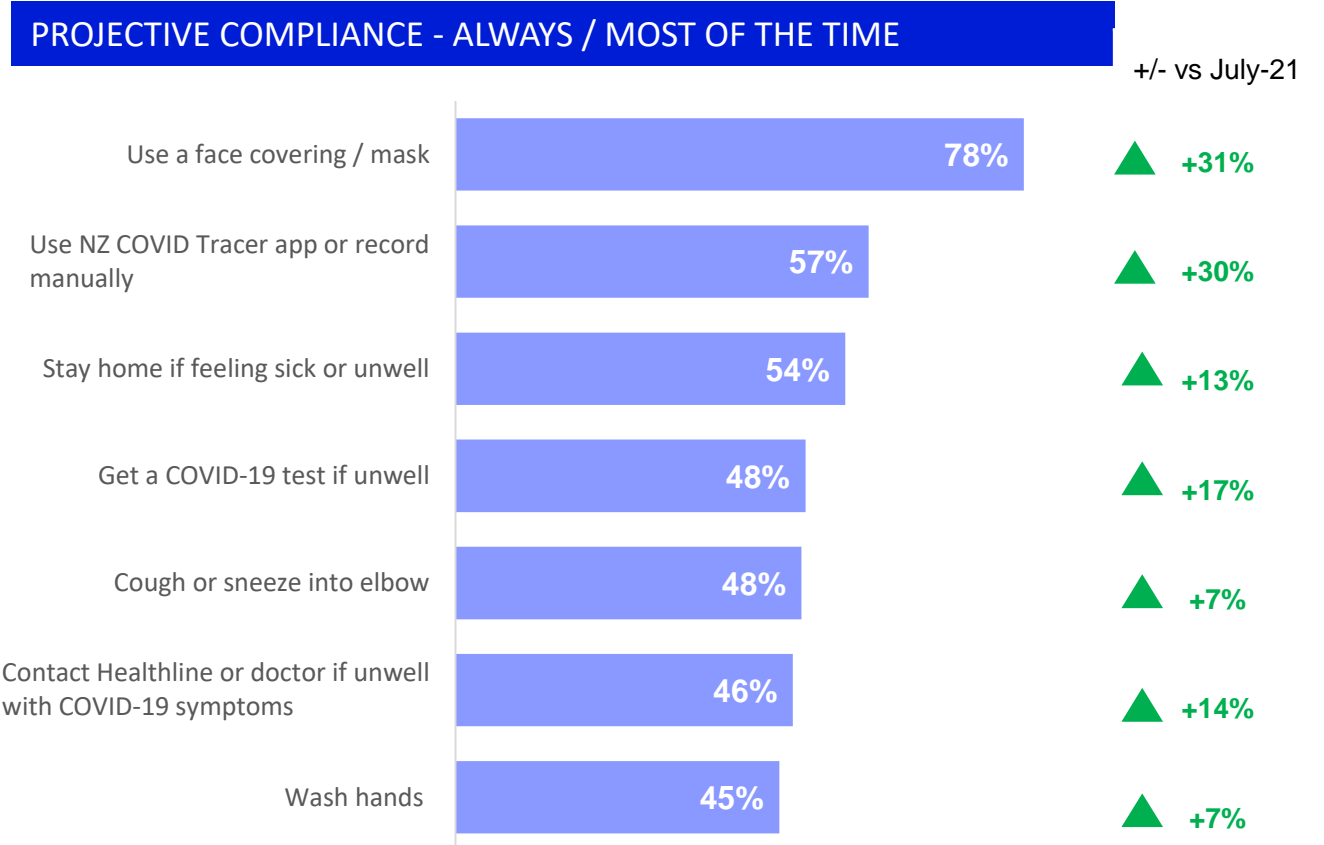
**Behaviour and
compliance**

TRA

In a state where information needs are being largely met, are New Zealanders complying with key COVID-19 guidelines?

In the current context, half are complying 'always' or 'most of the time' with key behaviours

We have seen large significant uplifts in compliance across all measured behaviours.

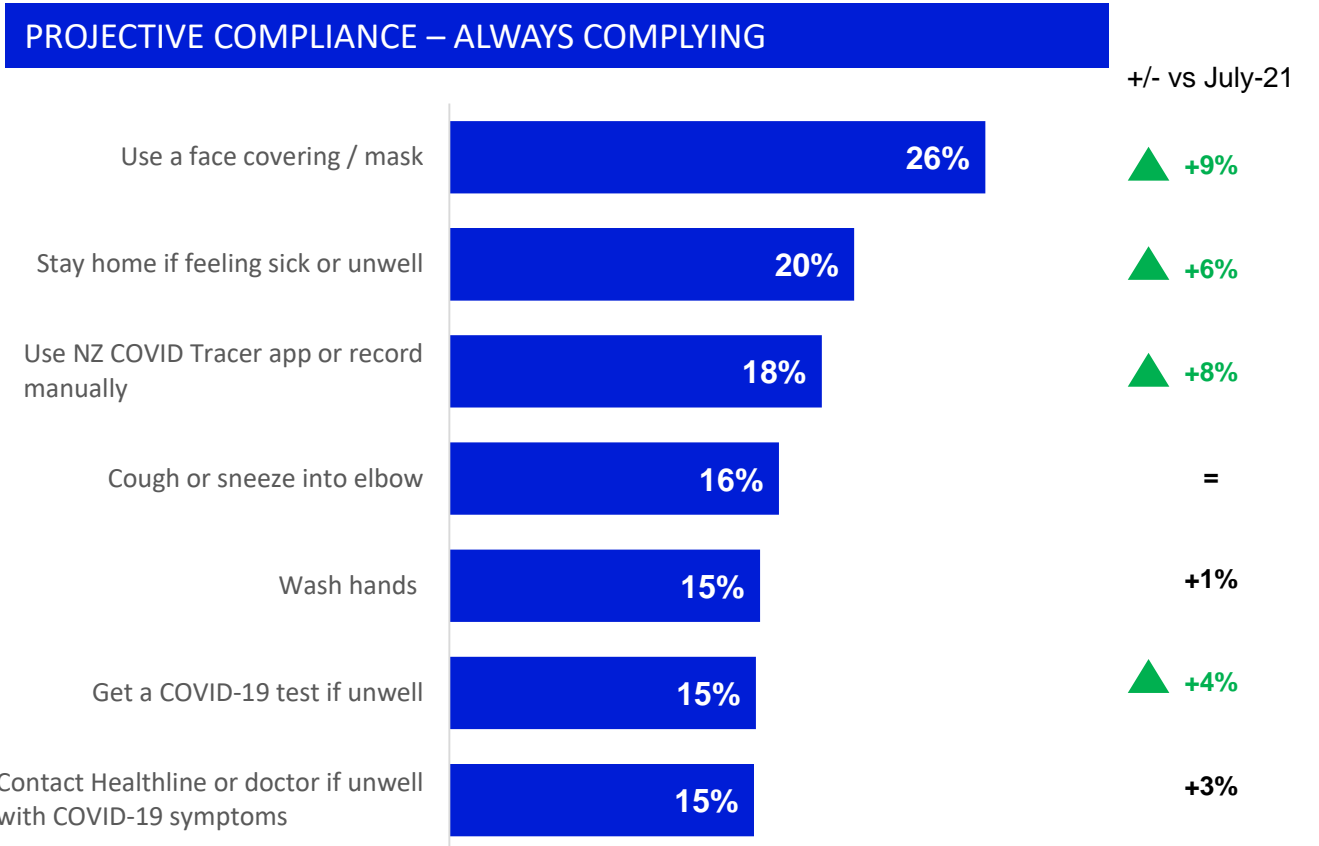


Source: Sentiment & Behaviours Dip 1 (July 2021), & Sentiment & Behaviours Dip 2 (September 2021)
 Q: How often do you think other New Zealanders do the following? (Always + Most of the time)
 Base: Sep-21 total sample n=846, July-21 total sample n=827

But compliance could be more consistent

Despite becoming mandatory, only 18% are 'always' complying with the NZ COVID Tracer app or recording their movements manually.

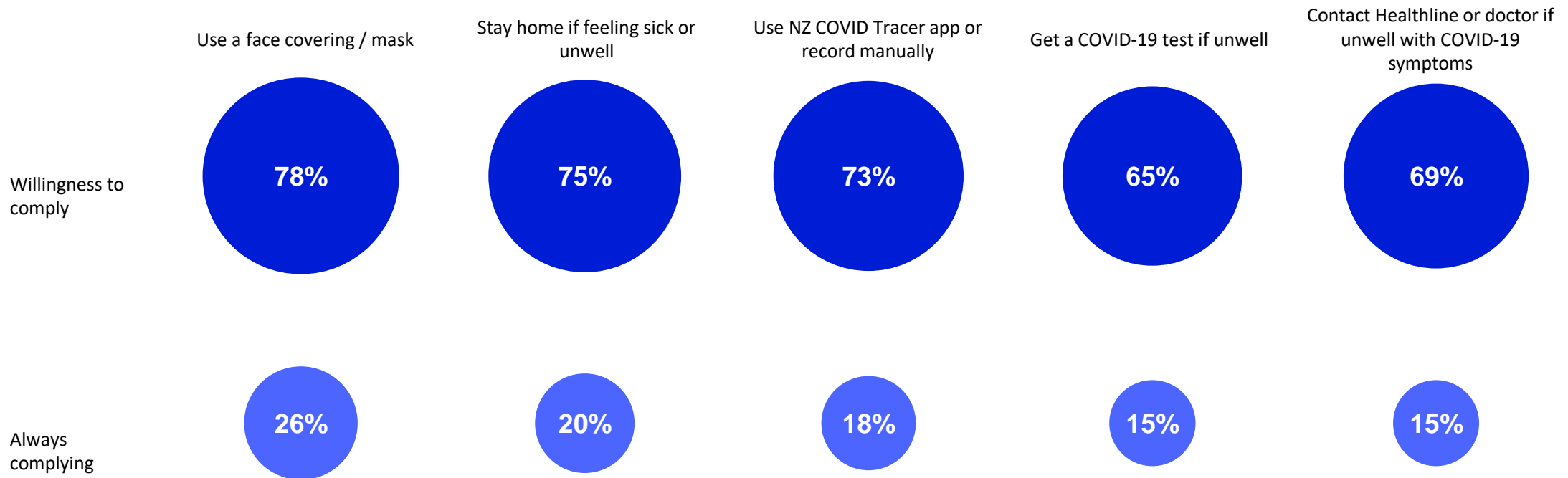
Getting a COVID-19 test and contacting Healthline if unwell with COVID-19 symptoms is the least consistent behaviour despite the current outbreak.



Source: Sentiment & Behaviours Dip 1 (July 2021), & Sentiment & Behaviours Dip 2 (September 2021)
 Q: How often do you think other New Zealanders do the following? (Always)
 Base: Sep-21 total sample n=846, July-21 total sample n=827

People’s willingness to comply is not translating to behaviour

WILLINGNESS TO COMPLY AND PROJECTIVE ‘ALWAYS’ COMPLYING – TOTAL SAMPLE



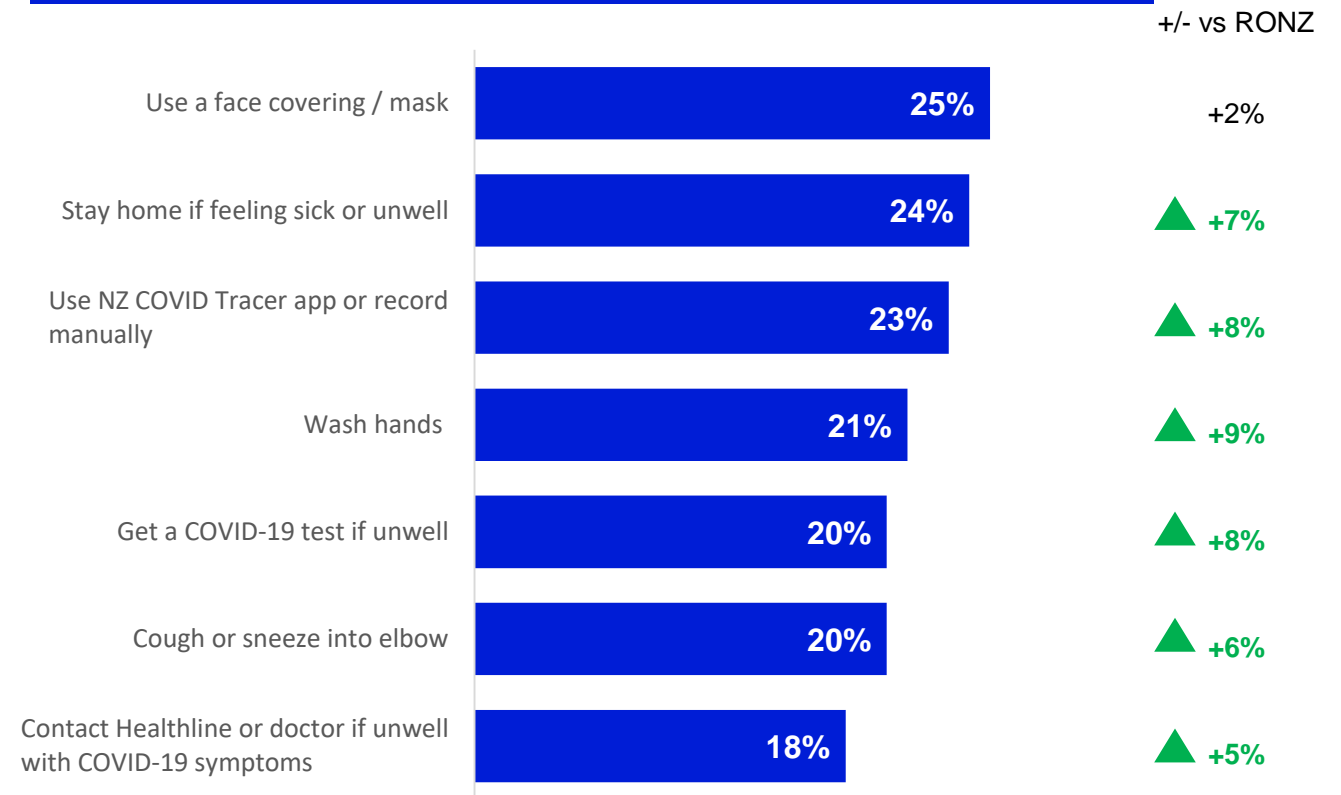
Source: Sentiment & Behaviours Dip 2 (September 2021)
 Q: How often do you think other New Zealanders do the following? (Always)
 Q: How willing are you to do the following? (Very willing, happy to comply)
 Base: Sep-21 total sample n=846

So, what do our compliant and non-compliant groups look like?

For almost all behaviours, Aucklanders are more consistently compliant than the rest of New Zealand

Aucklanders have higher compliance across almost all health behaviours.

PROJECTIVE COMPLIANCE - ALWAYS, AUCKLAND V REST OF NZ



Source: Sentiment & Behaviours Dip 2 (September 2021)
 Q: How often do you think other New Zealanders do the following? (Always)
 Base: Sep-21 total sample n=846, Aucklanders n=306, Rest of New Zealand n=540

Only seven percent of New Zealanders are the ‘True Compliant’ group, ‘always’ complying with all guidelines

Twenty-one percent are ‘Non-Compliant’, who ‘hardly ever’ or ‘never’ comply with at least one behaviour

‘NON-COMPLIANT’ GROUP – 21%

The ‘Non-Compliant’ group, more likely to be NZ European. There are no significant age skews. They feel we are going in the wrong direction and don’t think lockdowns are the country’s best option. They are less likely to Trust UAC and say they are not being told all the information they need to know, despite being just as engaged in information as others.

‘TRUE COMPLIANT’ GROUP – 7%

The ‘True Compliant’ group, more likely to be 35-54 years, and live in Auckland. They are more fearful of COVID-19 and believe lockdowns should be stricter. They are also more informed and engaged on COVID-19 messages and are more likely to “see or hear them all the time”

Source: Sentiment & Behaviours Dip 2 (September 2021)

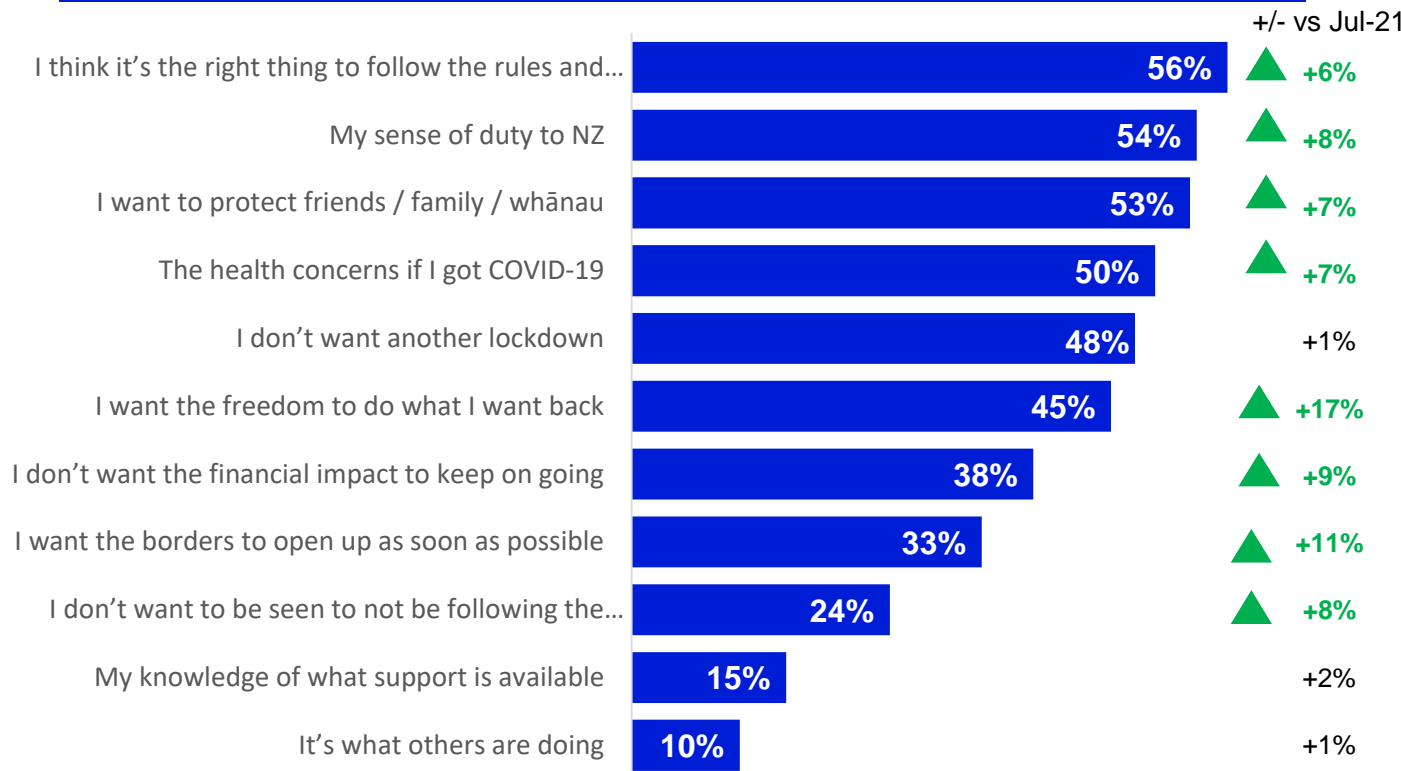
Q: How often do you think other New Zealanders do the following?

Base: Non-compliant group n=274 (‘Hardly ever’ or ‘never’ comply with any of the listed guidelines, and never ‘always’ comply with any of the listed guidelines). , True compliant group n=61 (Always comply to all COVID-19 guidelines listed)

How do we motivate New Zealanders to comply?

We know New Zealanders are motivated by thinking it's the right think to do, duty to NZ, and protecting others

COVID-19 GUIDELINE COMPLIANCE MOTIVATORS – TOTAL



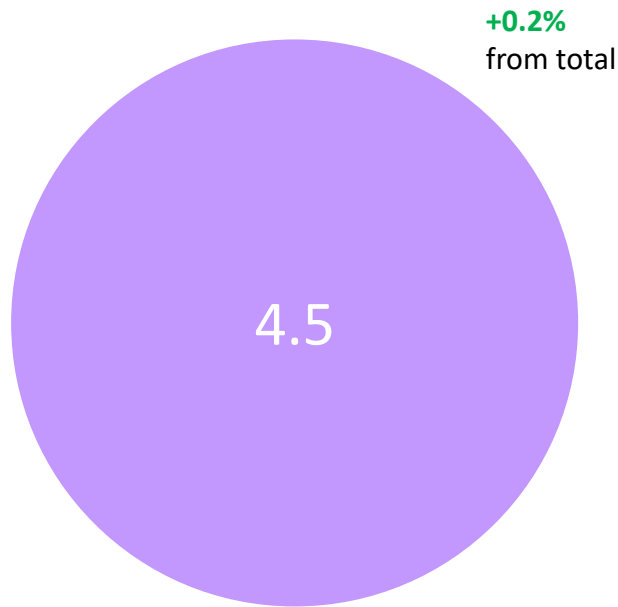
In the current context our motivation to comply with COVID-19 guidelines is heightened.

On average, people have 4.3 motivations, compared to 3.5 in July.

Source: Sentiment & Behaviours Dip 1 (July 2021) & Sentiment & Behaviours Dip 2 (September 2021)
 Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?
 Base: Sep-21 total sample n=846, July-21 total sample n=827

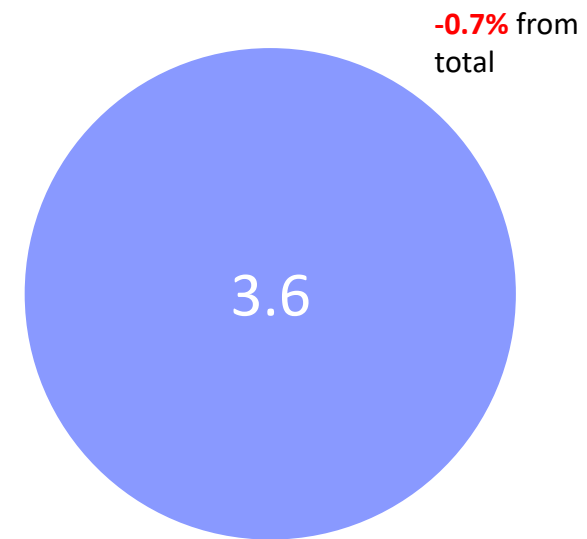
When we look at our 'non-compliant' group, they have more motivators compared to our 'true' compliant group

'NON-COMPLIANT' GROUP – 21%



Average motivators for our 'Non-Compliant' group

'TRUE COMPLIANT' GROUP – 7%



Average motivators for our 'True Compliant' group

Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines? , Non-compliant group n=274 ('Hardly ever' or 'never' comply with any of the listed guidelines, and never 'always' comply with any of the listed guidelines). , True compliant group n=61 (Always comply to all COVID-19 guidelines listed)

But 'Non-Compliants' have contextual motivators, rather than internal motivators like our 'True Compliant' group

The top motivators for 'True Compliant' group signal that they feel empowered that they can change the outcome

'NON-COMPLIANT' – MOTIVATIONS		V TOTAL
I don't want another lockdown	58%	+10%
I want the freedom to do what I want back	56%	+10%
The health concerns if I got COVID-19	52%	+2%
I think it's the right thing to follow the rules and laws	52%	-5%
I want to protect friends / family / whānau	45%	-7%
I don't want the financial impact to keep on going	44%	+6%
My sense of duty to NZ	43%	-11%
I don't want to be seen to not be following the guidelines	34%	+9%
I want the borders to open up as soon as possible	33%	=
My knowledge of what support is available	15%	+1%
It's what others are doing	11%	=
AVERAGE NUMBER OF MOTIVATORS	4.5	+0.2

'TRUE COMPLIANT' – MOTIVATIONS		V TOTAL
I think it's the right thing to follow the rules and laws	57%	=
My sense of duty to NZ	51%	-2%
I want to protect friends / family / whānau	47%	-6%
The health concerns if I got COVID-19	43%	-7%
I don't want another lockdown	37%	-11%
I want the freedom to do what I want back	32%	-14%
My knowledge of what support is available	32%	-17%
I don't want the financial impact to keep on going	26%	-12%
I want the borders to open up as soon as possible	17%	-16%
I don't want to be seen to not be following the guidelines	14%	-10%
It's what others are doing	6%	-4%
AVERAGE NUMBER OF MOTIVATORS	3.6	-0.7

Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?

Base: Non-compliant group n=274 ('Hardly ever' or 'never' comply with any of the listed guidelines, and never 'always' comply with any of the listed guidelines), True compliant group n=61 (Always comply to all COVID-19 guidelines listed)

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Significantly higher / lower than total

TRA

IMPLICATION

People who believe that their compliance behaviours can change the outcome are more likely to comply

Vaccine

4

TRA

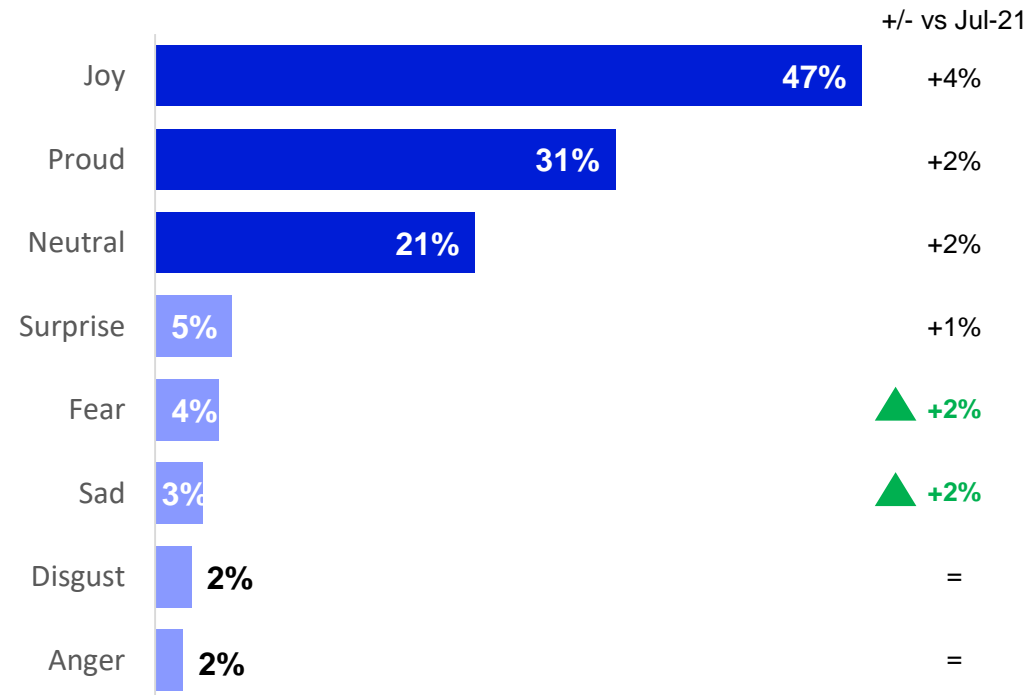
SUMMARY

Overall, we're feeling more positive about the vaccine rollout and a world where the majority of New Zealanders will be fully vaccinated. Information needs are consistently being met, and we're more engaged with vaccine influencers than before.

Our 'Vaccinated or Pending' group has doubled since our July Dip, and we have seen some movements in our 'Unlikely' and 'Unengaged' segments. Motivating those who are not yet vaccinated will become increasingly difficult as our low hanging fruit book their vaccine.

Overall, we're feeling positive about the vaccine rollout and a world where the majority of New Zealanders are vaccinated

SENTIMENT TOWARDS A WORLD WHERE MAJORITY ARE VACCINATED



HOW WELL DO YOU THINK THE VACCINE ROLLOUT IS GOING?

	TOTAL	+/- vs JULY
Really well	32%	▲ +18%
Okay	50%	-1%
Badly	13%	▼ -14%
Not sure	4%	-3%

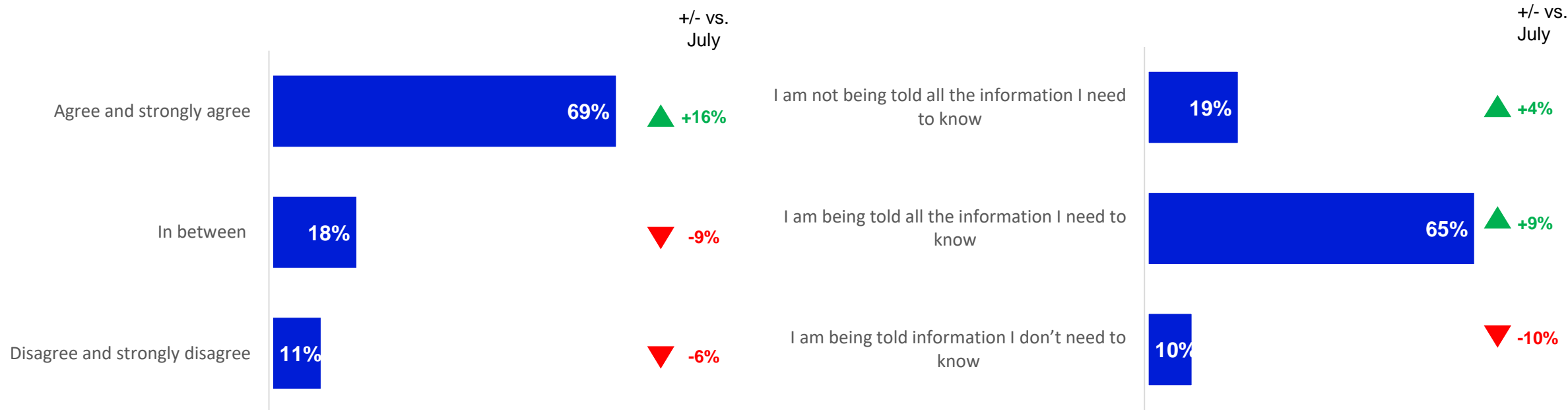
Source: Sentiment & Behaviours Dip 1 (July 2021) & Sentiment & Behaviours Dip 2 (September 2021)
 Q: Imagine a world where the majority of New Zealanders are vaccinated against COVID-19. How does this make you feel?
 Q: How well do you think the COVID-19 vaccine rollout is going in New Zealand?
 Base: Sep-21 total sample n=846, July-21 total sample n=827

Since July, there has been an increase in perceived quality and access to information on the vaccine

But some are starting to feel that there is too much information – they are more likely to be male (65%), Māori (26%), and employed (71%) and their vaccination status is comparable to total sample (71% vaccinated).

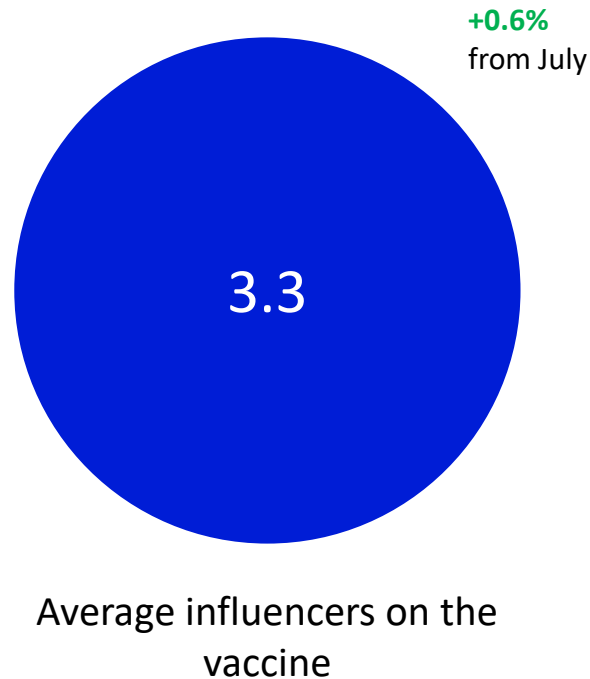
AGREE YOU HAVE ACCESS TO THE INFORMATION YOU WANT AND NEED ABOUT COVID-19

INFORMATION QUALITY



Source: Sentiment & Behaviours Dip 1 (July 2021) & Sentiment & Behaviours Dip 2 (September 2021)
 Q: From everything you've seen or heard about COVID-19 do you agree that you have access to all the information you want and need?
 Q: How do you feel about the quality of information about COVID-19 that is currently being provided on what you need to do?
 Base: Sep-21 total sample n=846, July-21 total sample n=827

We are listening to more people than before when it comes to the vaccine, but top influencers are stable



TOP INFLUENCERS – CONSISTENT RANK WITH JULY

Ashley Bloomfield (58%)
+13% from July

Jacinda Ardern (46%)
+12% from July





Chris Hipkins (36%)
+5% from July

Family doctor, GP, Healthcare Professional (28%)
+2% from July

Unite Against COVID-19 Platforms (21%)
-1% from July

Source: Sentiment & Behaviours Dip 1 (July 2021) & Sentiment & Behaviours Dip 2 (September 2021)
Q: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?
Base: Sep-21 total sample n=846, July-21 total sample n=827

Vaccine segments show we still have people who will be harder to engage

VACCINE SEGMENT	17-Sep	13-Sep	Jul
Vaccinated or Pending	 81%	76%	40%
Good to Go	 2%	3%	20%
Okay with it	 5%	6%	15%
Unlikely	3%	4%	5%
Unengaged	 4%	7%	7%
Rejectors	5%	4%	8%

‘Good to Go’ and ‘Okay with it’ are moving toward ‘Vaccinated or Pending’. But there is still work to be done, with 7% ‘Unlikely’, or ‘Unengaged’.

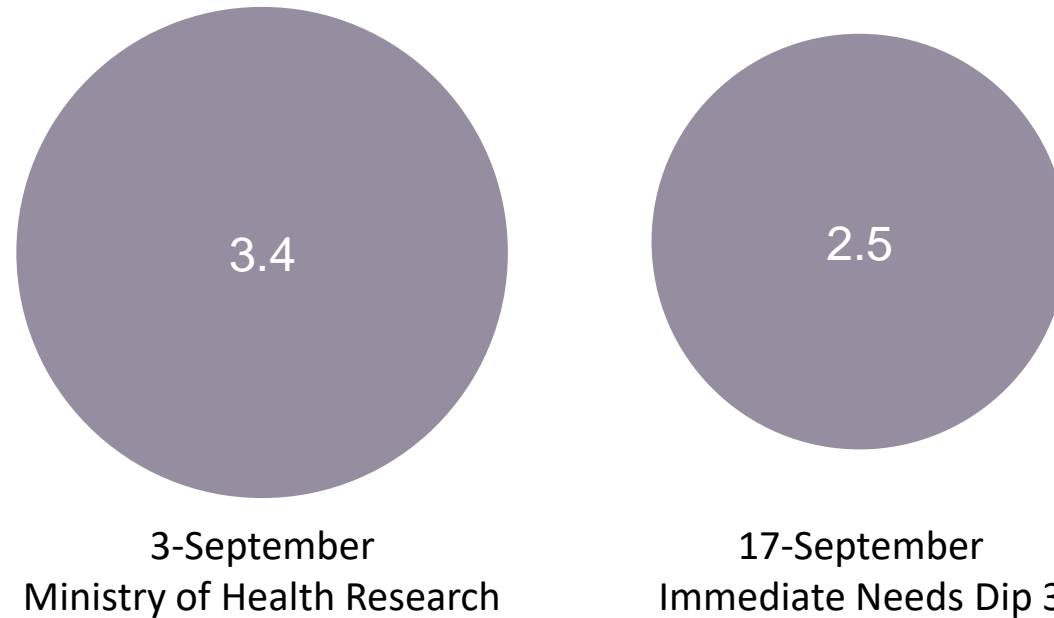
Source: Sentiment & Behaviours Dip 2 (17-Sep Wave & 13-Sep Wave) & Sentiment & Behaviours Dip 1 (July 2021)
 DPMC Vaccine Segments
 Base: total sample September 17 n=329, September 13 n=477, July-21 total sample n=827

The remaining unvaccinated are harder to shift and are less motivated

Unvaccinated – 12%

AVERAGE NUMBER OF MOTIVATIONS FOR COVID-19 VACCINE - UNVACCINATED

The remaining unvaccinated are now harder to shift and less motivated.



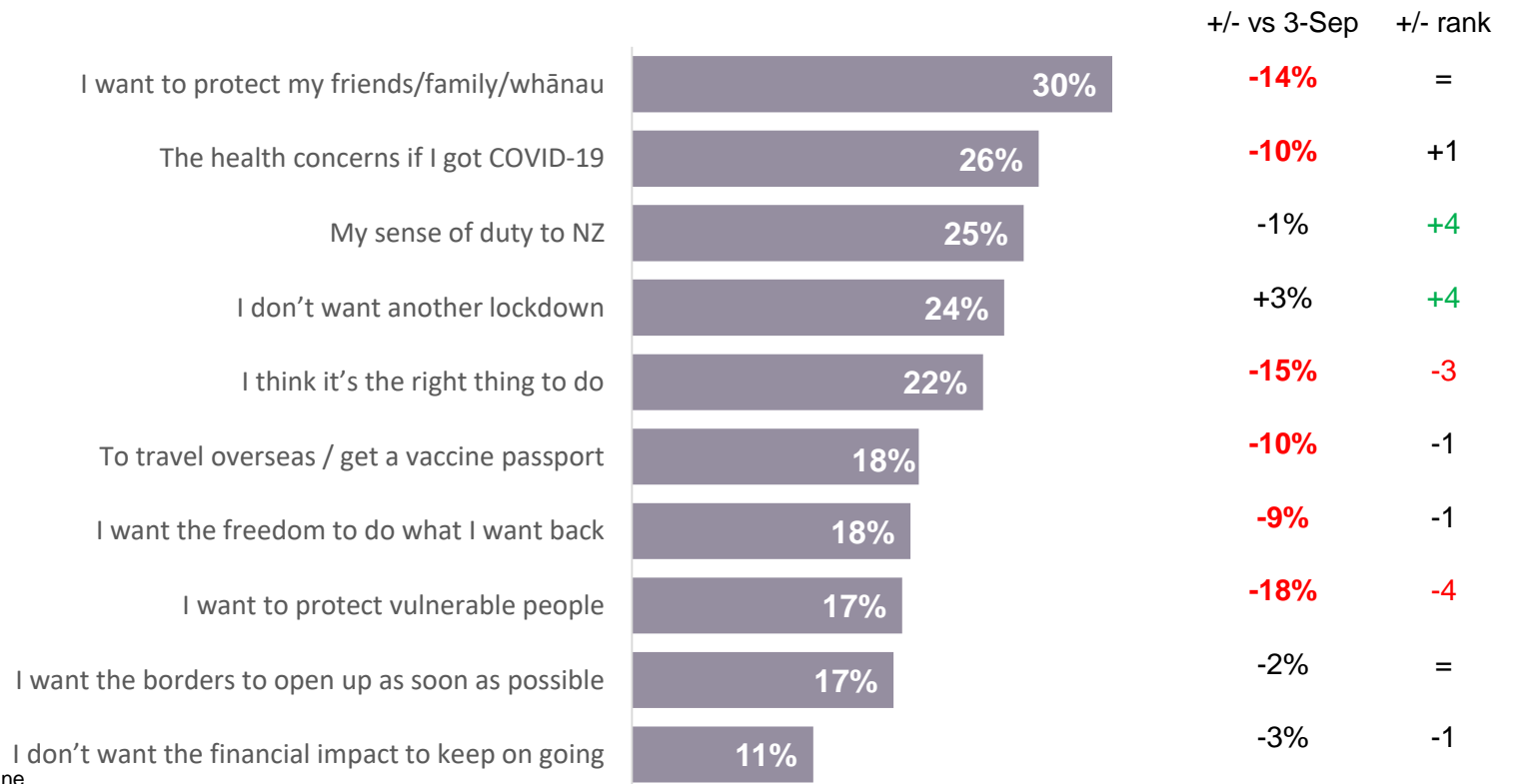
Source: Sentiment & Behaviours Dip 2 (September 2021) & Ministry of Health Vaccine Barriers and Motivations Research (3-September 2021)
 Q: Which of the following are most likely to make you want to get the vaccine?
 Base: September 2021 Sentiment & Behaviours unvaccinated sample n=253, 3-Sep MoH unvaccinated sample n=311

Unvaccinated – 12%

Nearly all key motivators among the remaining unvaccinated have dropped

For the unvaccinated, their top motivations have changed from 3-Sep measures. In particular, “I think it’s the right thing to do” (-3 in rank), and “I want to protect vulnerable people” (-4 in rank) have dropped.

COVID-19 VACCINE MOTIVATIONS – TOP 10 MOTIVATIONS



Source: Sentiment & Behaviours Dip 2 (September 2021) & Ministry of Health Vaccine Barriers and Motivations Research (3-September 2021)
 Q: Which of the following are most likely to make you want to get the vaccine?
 Base: September 2021 Sentiment & Behaviours unvaccinated sample n=253, 3-Sep MoH unvaccinated sample n=311

Unvaccinated – 12%

The twelve-percent who are unvaccinated are more unsure about what being vaccinated means for them

The unvaccinated group are more likely to be under 35, female, and unemployed.

They are not positive towards a future where the majority are vaccinated in NZ.

They are also more likely to think we're going in the 'wrong' direction when it comes to handling COVID-19 and are less likely to agree with the use of lockdowns.

Source: Sentiment & Behaviours Dip 2 (September 2021) & Ministry of Health Vaccine Barriers and Motivations Research (3-September 2021)

Q: Which of the following are most likely to make you want to get the vaccine?

Base: September 2021 Sentiment & Behaviours unvaccinated sample n=253, 3-Sep MoH unvaccinated sample n=311

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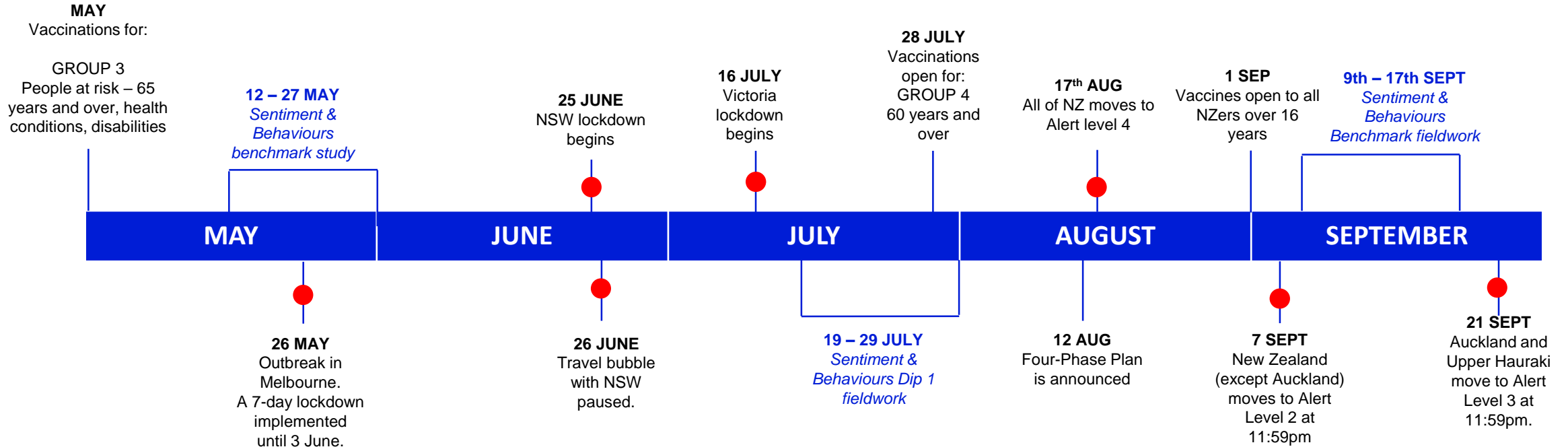
Ngā Mihi

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Appendix

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Timeline of key events



COVID-19 SENTIMENT BY AGE GROUP

Across all age groups, the majority (around 70%) feel the country is going in the 'right direction' with handling the impact and response to COVID-19

UNDER 35s

Significantly more likely to feel joy about the COVID-19 situation in NZ (16%, **+5%** from total)

Least concerned age group (5.2 concerns, -1.2 from total). Top concerns are same as total sample.

Significantly less concerned with effect on the economy (**56%**, but still their top concern), new COVID-19 variants (**37%**), financial impact it has on businesses (**35%**), the vaccination plan and rollout (**27%**), border/MIQ security (**22%**), access to healthcare (**21%**).

Significantly more likely to feel their life is better than pre COVID-19 (25%, **+8%** from total)

Significantly less likely to agree that lockdowns are our best option to keep the country safe (64%, **-8%** from total) and less likely to think that lockdowns should be stricter than they currently are (23%, **-7%** from total)

35-54 YEARS

They are most like the total sample.

No significant differences in COVID-19 sentiment compared to total sample.

Similar levels of concern as total sample and top concerns are the same as total sample. Significantly less concerned about low socio-economic areas being hit the hardest (24%, **-7%** from total).

They feel similar to total sample in terms of how their life is compared to pre COVID-19.

They are significantly more likely to agree that lockdowns should be stricter (39%, **+9%** from total).

55 YEARS AND OVER

Significantly less likely to feel fear about the COVID-19 situation in NZ (4%, **-7%** from total)

Most concerned age group (7.5 on average, +1.1 from total). Top concerns are similar total sample, except for border/MIQ security which is +2 in rank from total. Significantly more likely to be concerned with the effect on the economy (**72%**), financial impact on businesses (**64%**), new COVID-19 variants (**58%**), border / MIQ security (**51%**), low socio-economic areas being hit the hardest (**39%**), and access to healthcare (**37%**).

Significantly more likely than total to feel their life is worse than pre COVID-19 (63%, **+11%** from total).

They are comparable to total sample when it comes to the handling of the current situation – the majority agree with lockdowns (76%), and the Alert levels used (76%).

Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Which of the following are most likely to make you want to get the vaccine?

Base: Sep-21 total sample n=846, Under 35s n=288, 35-54 years n=274, 55 years and over n=284

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Significantly **higher** / **lower** than total

TRA

The twelve-percent who are unvaccinated are more unsure about what being vaccinated means for them

Unvaccinated – 12%

DEMOS

Significantly more likely to be under 35 (45%, **+11%** from total), female (63%, **+12%** from total) and unemployed (27%, **+10%** from total)

VACCINE SENTIMENT – UNENGAGED & SKEPTICAL

- More likely to be “not sure” about what life will be like once the majority of New Zealanders are vaccinated (13%, **+6%** from total)
- Significantly more likely to feel ‘neutral’ (37%, **+16%** from total) about a world where majority of New Zealanders are vaccinated
- Less likely to think the rollout is going really well (22%, **-10%** from total)
- More likely to feel they’re “not being told all the information I need to know” on the vaccine (32%, **+13%** from total)

GENERAL SENTIMENT

- More likely to think the country is going in the ‘wrong direction’ when it comes to handling COVID-19 (22%, **+6%** from total)
- Significantly less likely to agree that lockdowns are the best option to keep the country safe (58%, **-14%** from total)

INFORMATION SOURCES – LESS ENGAGED

Top vaccine influencers are Ashley Bloomfield (42%, **-16%** from total), Jacinda Ardern (35%, **-11%** from total), **friends / family / whānau** (27%, **+8%** from total)

Top information sources are similar to total sample - articles in the news and media (54%), media briefings (51%), COVID-19 advertising (46%)

Source: Sentiment & Behaviours Dip 2 (September 2021) & Ministry of Health Vaccine Barriers and Motivations Research (3-September 2021)

Q: Which of the following are most likely to make you want to get the vaccine?

Base: September 2021 Immediate Needs unvaccinated sample n=253, 3-Sep MoH unvaccinated sample n=311

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Significantly **higher** / **lower** than total

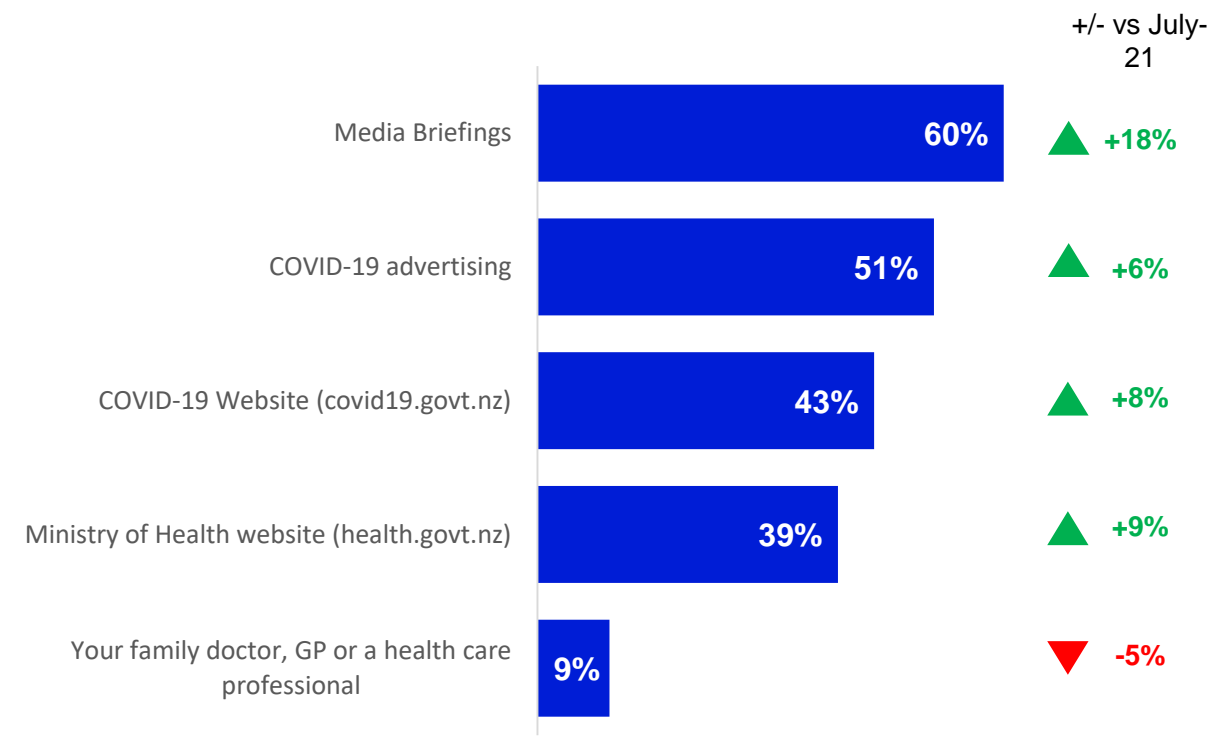
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There is continued extensive reach of Government and healthcare professional information sources

87%

Are using Government and healthcare professional information sources

INFORMATION SOURCES – GOVERNMENT AND HEALTHCARE PROFESSIONALS



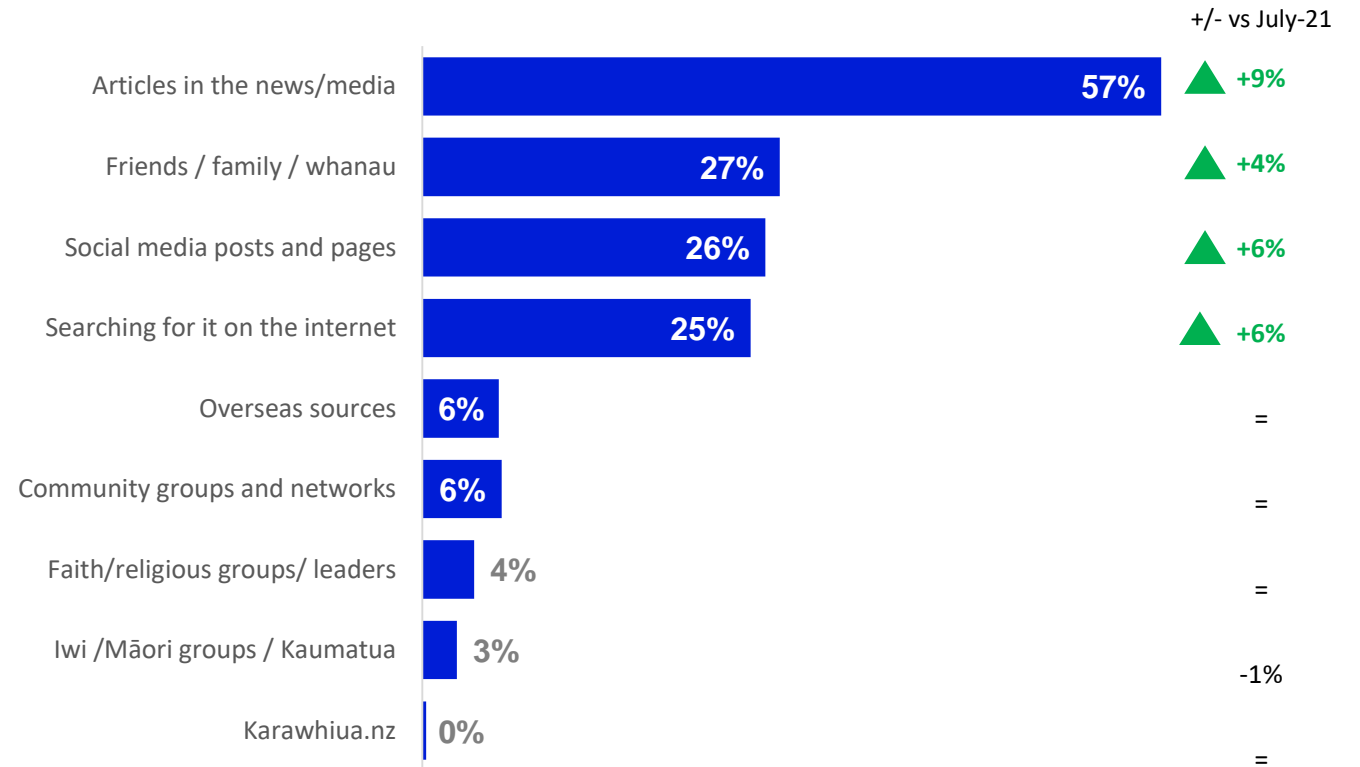
Source: Sentiment & Behaviours Dip 2 (September 2021)
 Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, the COVID-19 vaccine etc.?
 Base: Sep-21 total sample n=846, July-21 total sample n=827

And we continue to see high levels of other information sources as well

79%

Are using non- Government and healthcare professional information sources

INFORMATION SOURCES – NON-GOVERNMENT AND HEALTHCARE PROFESSIONALS

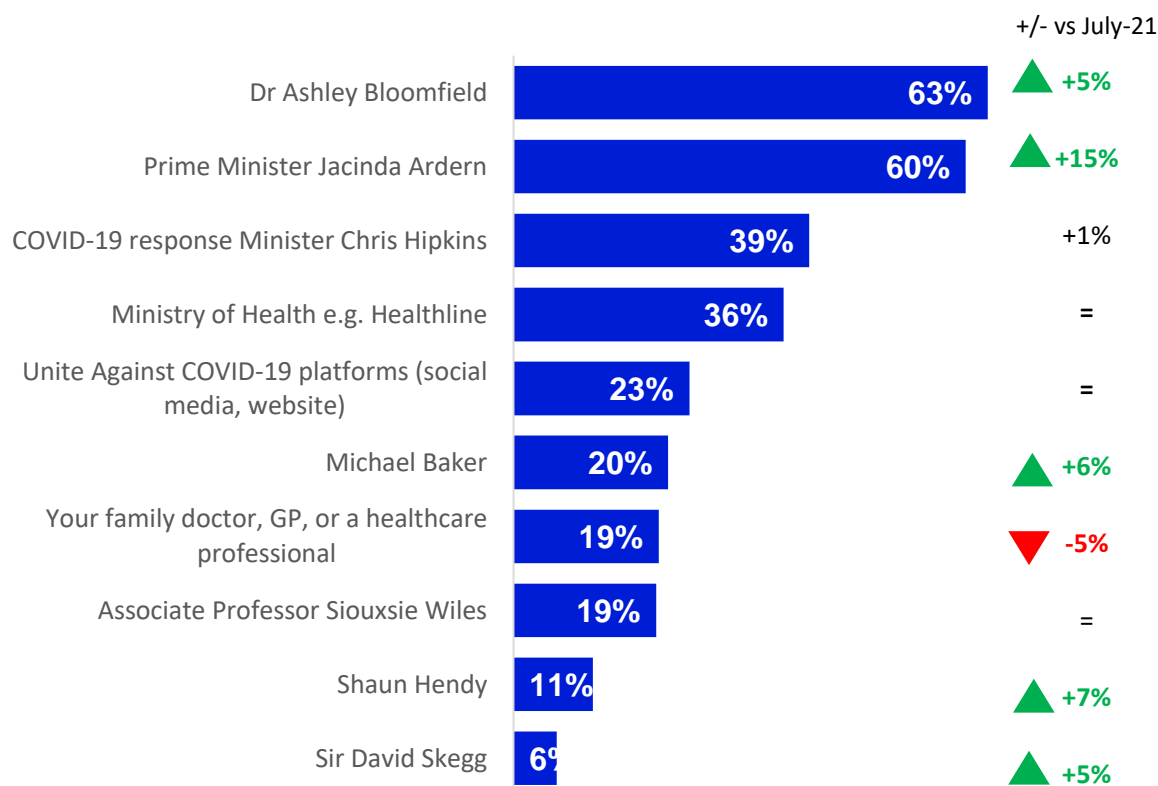


Source: Sentiment & Behaviours Dip 2 (September 2021)
 Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, the COVID-19 vaccine etc.?
 Base: Sep-21 total sample n=846, July-21 total sample n=827

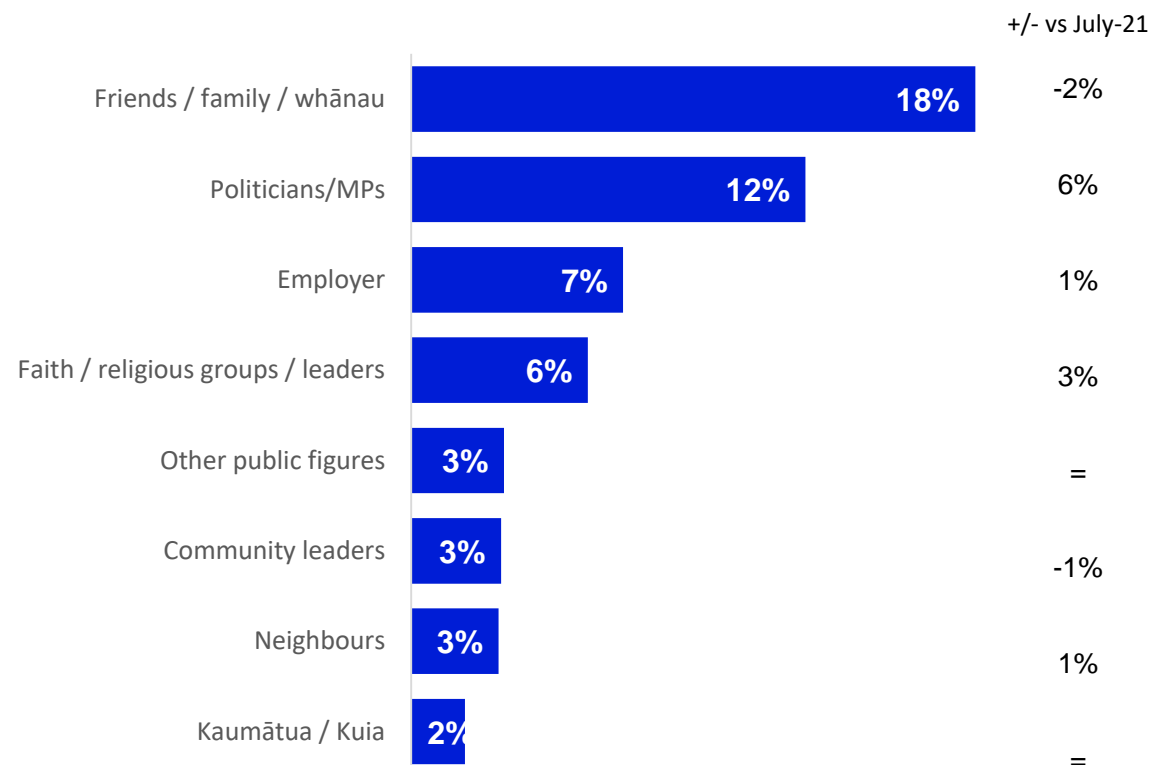
Significantly higher / lower than July-21

Since July, we have seen uplifts in many Government & Healthcare, and Academic influencers

INFLUENCERS – GOVERNMENT & HEALTHCARE PROFESSIONALS AND ACADEMICS



INFLUENCERS – OTHER INFLUENCERS





Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?

Base: Sep-21 total sample n=846, July-21 total sample n=827

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  Significantly higher / lower than July-21

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'Four-Phase' plan – awareness of components

AWARENESS OF PLAN COMPONENTS	TOTAL
Eventually opening Quarantine Free Travel for all vaccinated travellers	64%
Creating new travel pathways to New Zealand based on the COVID-19 risk of the country of origin	52%
Vaccinations available to all eligible New Zealanders	44%
14 day's MIQ for the majority of unvaccinated travellers	42%
Testing at the border and public health measures like QR scanning still in place	39%
Introducing vaccine passports	32%
Maintaining an 'elimination' strategy	28%
Introducing booster vaccinations if required	25%
Self-isolation pilot	22%
Still using the different Alert Levels	21%
Introducing a day 5 COVID-19 test in MIQ	20%

Source: Sentiment & Behaviours Dip 2 (September 2021)
 Q: What do you understand is in this plan?
 Base: Sep-21 those aware of Four phase plan n= 104

More stable motivators, such as engagement and ideology, drive consistently higher levels of compliance

COMPLYING ALWAYS OR MOST OF THE TIME - BY MOTIVATION

	My knowledge of available support	My sense of duty to NZ	It's the right thing to follow the rules & law	I want to protect friends & family	It's what others are doing	The health concerns if I got Covid	I don't want another lockdown	Don't want the financial impact to continue	I want the borders to open up ASAP	Want the freedom to do what I want back	Don't want to be seen to not be following the guidelines
AVERAGE NO OF BEHAVIOURS COMPLYING WITH	4.3	4.1	3.9	3.9	3.9	3.8	3.7	3.6	3.6	3.5	3.4
Use a face covering / mask as required in the different Alert Levels	78%	83%	82%	84%	91%	79%	81%	82%	79%	81%	76%
Use the NZ COVID Tracer app or manually record their movements	65%	62%	60%	60%	63%	58%	55%	56%	53%	55%	55%
Wash hands with soap for at least 20 seconds / sanitising	55%	47%	46%	43%	46%	44%	42%	40%	42%	38%	36%
Cough or sneeze into elbow	48%	51%	48%	48%	47%	45%	46%	42%	44%	43%	38%
Contact Healthline or doctor if unwell with COVID-19 symptoms	59%	52%	48%	48%	50%	50%	47%	44%	46%	43%	44%
Staying home if feeling sick or unwell, including staying off work	63%	61%	59%	60%	50%	58%	55%	52%	53%	51%	50%
Get a COVID-19 test if unwell	58%	53%	49%	49%	42%	48%	49%	47%	48%	45%	43%

Source: Sentiment & Behaviours Dip 2 (September 2021)

Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?

Q: How often do you think other people in New Zealand do they following? (always + most of the time)

Base: Sep-21 total sample n=846

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When already complying with more involved behaviours, we see consistent high levels of other compliance

COMPLIANCE 'ALWAYS' OR 'MOST OF THE TIME' X COMPLIANCE 'ALWAYS' OR 'MOST OF THE TIME'

AVERAGE NO OF BEHAVIOURS COMPLYING WITH	Wash hands with soap for at least 20 seconds / sanitising	Contact Healthline or doctor if unwell with COVID-19 symptoms	Get a COVID-19 test if unwell	Cough or sneeze into elbow	Stay home if sick, including staying off work	Use the NZ COVID Tracer app or manually record their movements	Use a face covering / mask as required in the different Alert Levels
	5.7	5.6	5.6	5.5	5.4	5.2	4.5
Wash hands with soap for at least 20 seconds / sanitising	100%	69%	69%	72%	65%	62%	53%
Contact Healthline or doctor if unwell with COVID-19 symptoms	71%	100%	77%	66%	70%	63%	54%
Get a COVID-19 test if unwell	74%	80%	100%	66%	73%	65%	57%
Cough or sneeze into elbow	77%	67%	66%	100%	67%	63%	56%
Stay home if sick, including staying off work	79%	81%	81%	76%	100%	71%	62%
Use the NZ COVID Tracer app to scan in or manually record their movements	79%	77%	77%	75%	75%	100%	68%
Use a face covering / mask as required in the different Alert Levels	92%	92%	92%	92%	90%	93%	100%

Source: Sentiment & Behaviours Dip 2 (September 2021)
 Q: How often do you think other people in New Zealand do they following? (always + most of the time)
 Base: Sep-21 total sample n=846
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IMPLICATION

We can target specific behaviours to drive compliance across other key COVID-19 behaviours

High compliance with the below behaviours,
is an indicator for high compliance with other behaviours:

- Wash hands with soap for at least 20 seconds / sanitising
- Contact Healthline or doctor if unwell with COVID-19 symptoms
 - Get a COVID-19 test if unwell