SUMMARY COVID-19 SENTIMENT - MAY 21

OVERVIEW OF RESEARCH

This research was undertaken to give us an overview of how New Zealanders are feeling in relation to COVID-19, and the associated behaviours required of them. We are also interested in how they are feeling towards the future. These insights will assist us in continuing to evolve how we develop our messaging and campaigns. A quantitative method was used, with a sample size of 1,853 New Zealanders aged 16 years and over. The research included key samples Māori n=255 & Pasifika n=112 and the data was post weighted to be representative of the NZ population.

Following this round of research, we plan to do smaller 'pulse checks' to measure changes in sentiment and use the tool to test different messaging that is developed. TRA were contracted to undertake research.

FINDINGS

Sentiment & Future

- Overall, COVID-19 isn't seen to be getting in the way of progress and how people are feeling about the future.
- Their goals reflect normal life - spending time with friends and family, going on holidays, and financial progress.
- And in most cases, people don't feel COVID-19 will have much of an impact on what they want to achieve. While there is some obvious worry that COVID-19 could affect time with friends and family (for example if there was another lockdown), travel and financial positions, most feel that they will be able to continue achieving personal milestones, progressing in careers and getting healthier.
- Overall people are feeling quite passive about COVID-19 (44% neutral on their emotions around COVID-19), and that as a country we are heading in the right direction with our response (75%). There is a small group (12%) who do think we're going in the wrong direction with the balance of people, not sure (13%).
- Overall people believe they will either continue on the progress trajectory they are on or will make even more progress in the next year. And in the future, people are looking forward to feeling less stressed (46%), relaxed (45%), secure (43%), and content 40%.

- There is a group who feel their life is worse than before COVID-19. This group is still compliant with COVID-19 health and Alert Level behaviours, but due to their circumstance are feeling worse about life.

Travel & Borders

- While most are fine with opening up the bubble to limited people, there is still an underlying worry for a third. New Zealanders are more comfortable with Cook Islands quarantine free travel than Australian quarantine free travel.
- 53% are worried about opening up quarantine free travel beyond Australia and the Cook Islands. And while people are slightly more okay with workers coming to New Zealand to support, they are still worried about that risk.
- 84% of people OK with stopping travel from very high-risk countries.
- New Zealanders are most likely to travel within New Zealand – with 83% planning to undertake this within the next 12 months. 42% plan to travel to the Cook Islands and 62% plan to travel to Australia.
- On average only 54% of people have thought about what preparations they need to do if they decided to travel away from their home (either within NZ or overseas with QFT).

Behaviours

- While the economy is still top of mind (51% down from 76%), New Zealanders are spending more time thinking about the vaccination plan (40% up from 23%).
- Overall people feel they are largely willing to do their part, but we aren't necessarily seeing this in their behaviours.
    - Staying home if you're feeling sick or unwell, including staying off work (75%)
    - Coughing or sneezing into your elbow (84%)
    - Washing your hands w/ soap for at least 20s / sanitising (85% up from 72%)
    - Contacting Healthline or your doctor if unwell with COVID-19 symptoms (80%)
    - Using a mask on public transport (79%)
    - Using NZ COVID Tracer app to scan in (67%)
    - Turning on Bluetooth in the NZ COVID Tracer app (62%)
- People are motivated by following the rules (56%), their sense of duty (46%), avoiding another lockdown (48%), health concerns (43%), and protecting family and friends (42%). Protecting friends and whānau is a key motivator for Māori and Pasifika.
- New Zealanders are realistic that COVID-19 health behaviours will be sticking around after the vaccination roll-out (36%) and 47% of people expect, there will be some differences in day to day life compared to pre-COVID-19. Only 9% of

New Zealanders believe that getting the country vaccinated will return life to how it was pre-COVID-19.

Information

- People mostly feel like they're getting the right amount of information and it is of quality, but this positive assessment has weakened since March 2021. 83% of New Zealanders are getting at least some of their information from Government sources and healthcare professionals.
- Those who are getting information from non-Government sources (17%) are more likely to be Pasifika or 16-17 years old. They are more they're likely to be getting information from Articles in the news/media (48%), friends and family (24%), social media (23%), or the internet (20%).
- There has been an increase in reach for the Ministry of Health and Health Officials and this is likely in response to the focus on the vaccination roll-out. 84% of New Zealanders at least listen to one Government source or healthcare professional as an influencer.

Unite Against COVID Brand

- The Unite Against COVID-19 brand performs strongly (42% see it as a brand they trust) but has a lower relevance for some audiences, specifically under 35's, māori and students in paid work. Trust in our brand is lower with māori.
- 54% see the UAC brand as everywhere, 44% believing that the brand really stands for something and 40% see as making a difference.

Specific Audiences

There are some specific audiences that are worth having specific initiatives in place for. There is diversity within these groups and they are defined by participants self selection.

<u>Māori</u>

- Despite feeling positive about their own lives, and that NZ is handling COVID-19 well (79% vs 75% total), they are more likely to feel fear towards the COVID-19 situation in NZ (11% vs 6% total).
- This stems from a worry that COVID-19 can impact their goals, particularly financial betterment.
- They are also significantly less likely to be happy to comply with some COVID-19 and Alert Level guidelines, such as contacting Healthline or your doctor if they feel unwell with COVID-19 type symptoms (64% vs 72% total).
- When it comes to compliance, they see friends and family as a key motivator.

<u>Pasifika</u>

- Pasifika are feeling relatively positive about their own lives, and that NZ is handling COVID-19 well (78% vs 75% total).
- But they feel more negative emotions towards the COVID- 19 situation in New Zealand, than the total population (44% vs 26%).
- They are motivated to protect their friends and family and want to travel overseas to see them (30% vs 19% total). However, they are not as prepared for the risk of QFT disruptions if they do travel (48% vs 57% total).
- They have lower levels of compliance either because they just don't do it, or they aren't aware of the rules, influenced by non-Government information sources.

Indian

- Indian's feel positive around their life, and feel New Zealand is handling COVID-19 well, they are compliant to health and alert level behaviours.
- But they are more motivated for the boarders to re-open further, unlike the rest of the population, the job to do here is more about proactively manage expectations so that this group does not become disengaged. 27% worried about stopping travel from high risk countries vs 16% total sample.

Under 35 males

- Under 35 males feel positive about their life, and feel New Zealand is handling COVID-19 well (80% right direction vs 75% total).
- But they are less engaged and motivated towards COVID-19 and this flows through to less compliant behaviours in comparison to the total population. While their highest ranked motivation is 'It's right to follow the rules and law' this is at 39% vs 56% total population.
- Younger males have some weaker associations with the Unite Against COVID-19 brand, particularly in relevance (25% believe it is for people like me vs 34% total).