

Behaviour & Sentiment March 22 Update

DEPARTMENT OF THE PRIME MINISTER AND CABINET

TRA

BACKGROUND

There is a need to understand ongoing sentiment and behaviours throughout the COVID-19 response.

The COVID-19 landscape in New Zealand continues to shift rapidly. After moving away from an elimination strategy to living with COVID-19, there is a need to understand what concerns New Zealanders have as they change their frame of mind to living with Omicron and reopening to the world.

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 and reassured while we live with Omicron in the community, and plan for a border reopening.

The specific objectives we set out to answer:

1. **Explore sentiment towards the COVID-19 response** – how are people feeling about COVID-19 generally, how are we handling the response as a country, and how does this impact on the UAC brand? How worried are people specifically about catching Omicron?
2. **Understand if messaging around key health behaviours is effective** – do New Zealanders think the behaviours they are being told to do are credible, and are their actions aligning (a particular focus on home isolation through the Omicron peak)? What motivations and barriers are driving their actions?
3. **Understand barriers to booster uptake** – what will stop New Zealanders from getting the COVID-19 booster shot, and how do we overcome these?
4. **Information and influencers** – understand the effectiveness of information and the key sources of influence.

Methodology

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

- Total sample n=900
- Margin of error at the 95% confidence interval is +/- 3.3%

Fieldwork ran from the 11th of March through to the 18th of March.

Key samples:

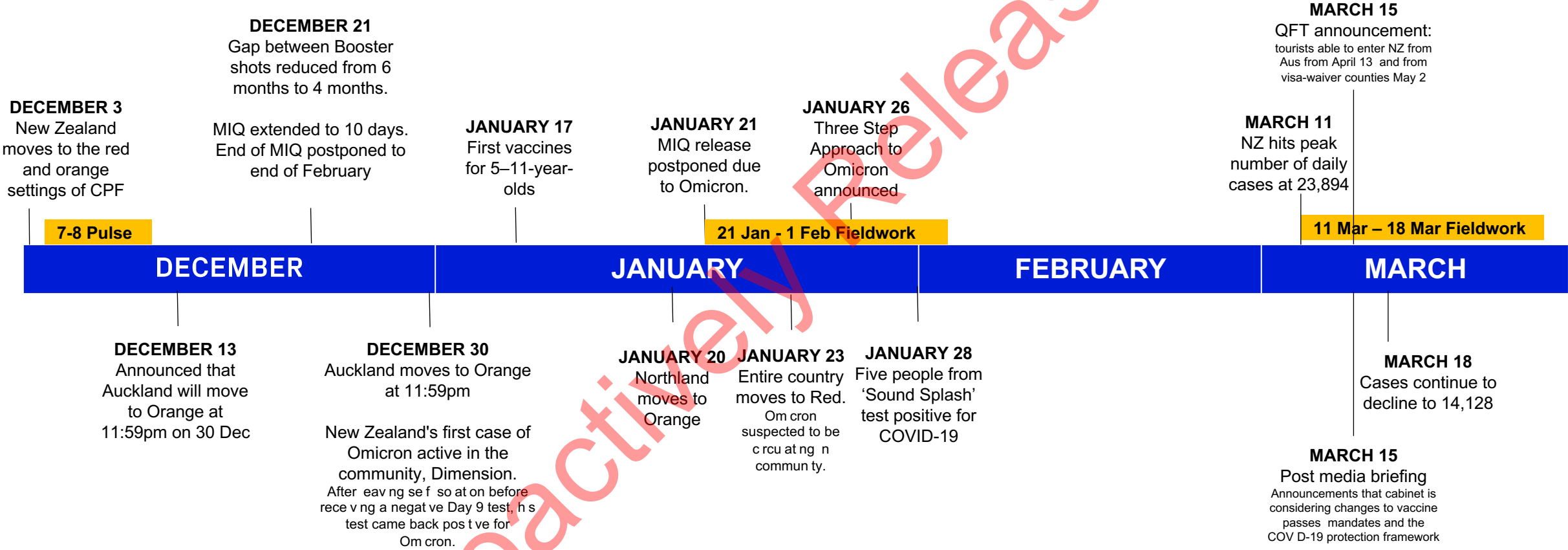
- Māori n=93
- Pasifika n=47

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 2021 Behaviour and Sentiment trackers, and the December Pulse Check.

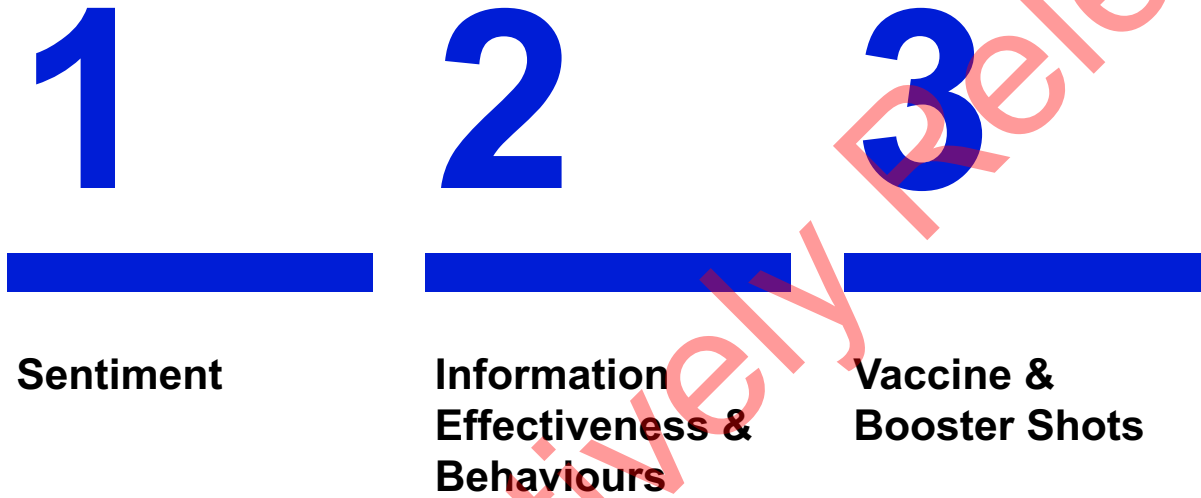
It is important to note that this is an online survey – people who do not have access to the internet are not represented in our findings.

Timeline



Proactively Released

Agenda



Sentiment

Proactively Released

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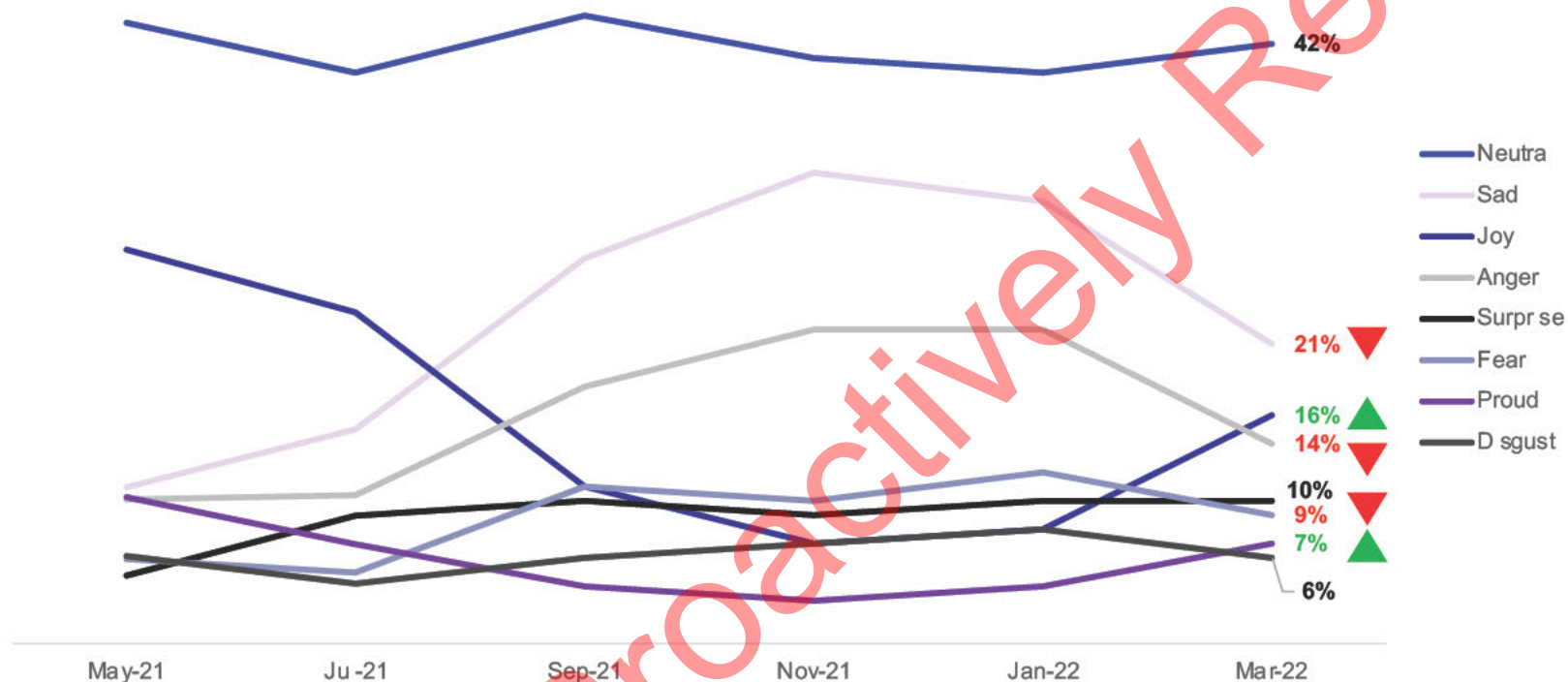
SENTIMENT: KEY OUTTAKES

- Following signalling of easing in restrictions, hitting our peak in the Omicron outbreak, and cases starting to decline, we are seeing sentiment shift in the right direction.
- New Zealanders can see the light at the end of the tunnel, but are waiting for things to actually get 'back to normal'.
- Auckland is unique in having gone through the Omicron peak earlier than the rest of the country – therefore sentiment is more positive.
- New Zealanders are feeling better about easing restrictions and reopening borders, but there is still a divide in feelings.

Despite neutrality dominating, we are seeing significant uptick in positive emotion, and downfall in negative

New Zealanders can see the light at the end of the tunnel

SENTIMENT TOWARDS THE COVID-19 SITUATION IN NZ – BY WAVE



In March, 'neutral' (42%) is the dominant emotion, followed by 'sad' (21%) and 'joy' (16%).

We see a reallocation from feelings of negative emotions like 'sad', 'anger' and 'fear' to positive emotions like 'joy' and 'proud' - an indication that NZers are adapting to living with COVID-19 in the community.

Source: Behaviour and Sentiment Tracker (May 21, Ju 21, Sep 21, Nov 21, Jan 22, Mar 22)
 Q: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?
 Base: Mar 22 total sample n=900, Jan 22 total sample n=944, 7 Dec total sample n=411, Nov 21 total sample n=917, Sep 21 total sample n=846, Ju 21 sample n=823, May 21 sample n=1,853

Increased feelings of 'Joy' are driven by learning to live with COVID-19 but also seeing a light at the end of the tunnel

JOY – 16%

7% - Learning to live with COVID

"We have to move on personally and economically."

"Let's get on with life."

"It is time to move forward, get on with life as we know it as we can't remain isolated forever."

6% - Going back to normal

"It's good to be moving into a space where we can live with the virus as I do not think an elimination strategy is sustainable anymore. I am excited for the borders opening."

"It's controlling our lives and how we live, I just want to get on with life and live it normally."

6% - Happy with the response

"Finally Govt is letting us get on with living."

"Because the Govt has done everything it could to help NZ cope with the virus better than most countries in the world"

"Great that the isolation rules are relaxing to enable business to stay open"

"The government has our best interests at heart"

Source: Behaviour and Sentiment Tracker (Mar 22)

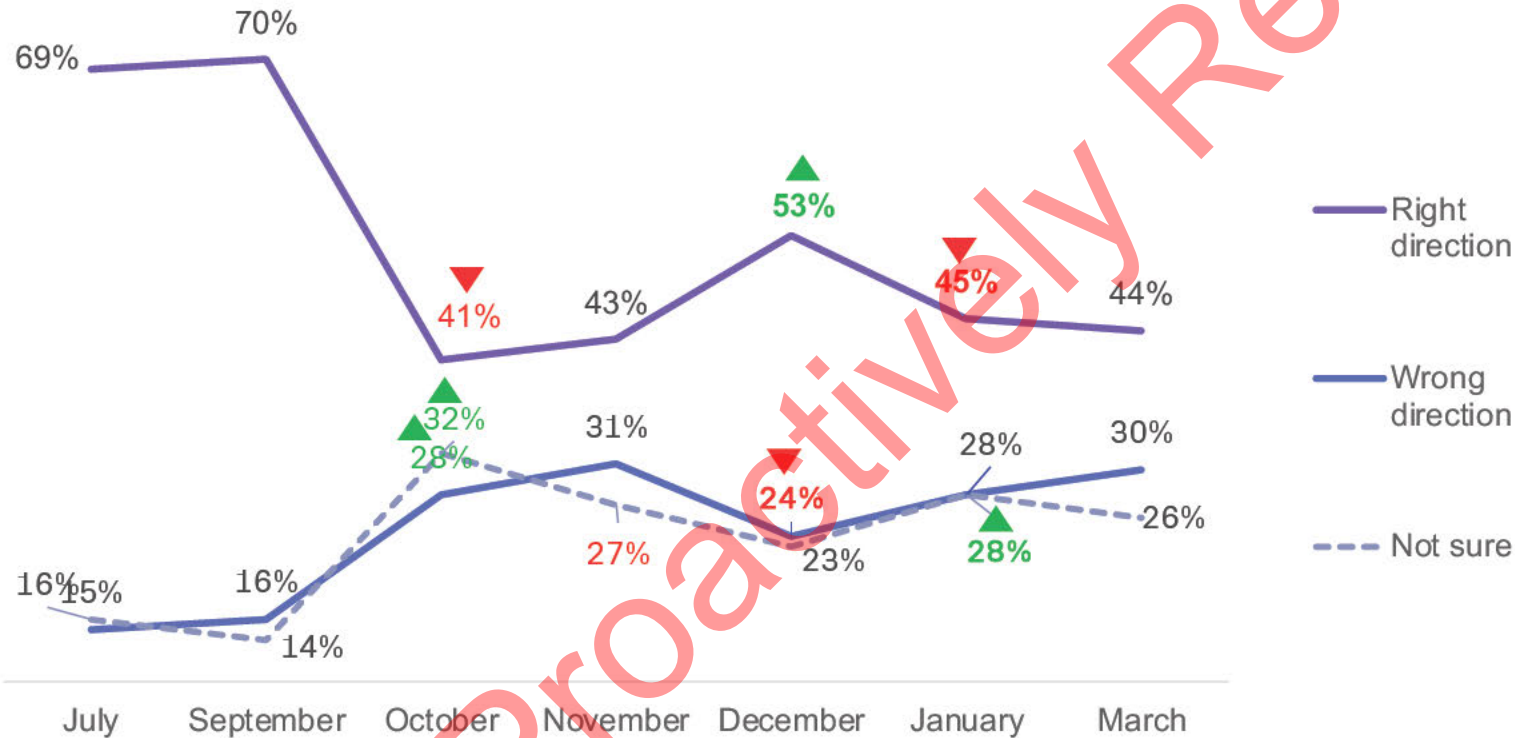
Q: And why do you feel this way?

Base: Feel joy n=144

Despite an evident shift in emotion, there is no subsequent shift in perception of moving in the right direction

This may not shift until rules and regulations actually change

HOW DO YOU THINK THE COUNTRY IS GOING WITH HANDLING THE IMPACT OF AND RESPONSE TO COVID-19? – BY WAVE



In Oct 21, we saw a significant narrowing of the gap between New Zealanders who thought we were going in the right direction vs. the wrong direction.

In Dec 21, we saw things start to move in a more positive direction, but this didn't hold into Jan 22. Now in March 22, we continue to see the patterns hold.

SPOTLIGHT ON NZERS WHO THINK WE ARE HEADING IN THE WRONG DIRECTION (Deniers & Rebels)

These people are more likely to have **low concern about getting Omicron** (29%, +8%), be **unvaccinated** (12%, +7%), say they are **definitely not getting the booster** (38%, +15%), and **haven't prepared for self-isolation** (31%, +9%)

Source: 7 December Pulse 2021 & Behaviour and Sentiment Tracker (Jul 21, Sep 21, Nov 21, Jan 22, Mar 22), 7 December Pulse Check, October Pulse
 Q: How do you think the country is going with handling the impact of and response to COVID-19?
 Base: Mar 22 total sample n=900, Jan 22 total sample n=944, 7 Dec Pulse total sample n=411, Nov 21 total sample n=917, October Pulse n=409, Sep 21 total sample n=846, Jul 21 total sample n=823
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▲ ▼ Significantly higher / lower than previous wave



Feelings that we are heading in the ‘wrong direction’ are driven by a desire to get ‘back to normal’

30%

Of New Zealanders think we are heading in the wrong direction...

Why?

TOP REASONS FOR WHY WE ARE HEADING IN THE ‘WRONG DIRECTION

20%
Want to move on / go back to normal

*“Should be treating it like seasonal flu”
“I wanna open borders and people living like normal as in other countries”
“We are just learning to live with it.”*

17%
Disagree with the response

*“The Govt don't seem to know what they are doing - they keep changing things - whether good or bad”
“Enforced division in society another level of them & Us”
“The government has lost their direction to control COVID.”
“Govt have not listened to the heartbeat of the nation”*

8%
Impact on the economy / cost of living

*“Petrol is ridiculously costly. Food is expensive. We’re going into winter where our power bills will likely be costly.”
“cost of living and housing.”
“The economy isn't good at the moment COVID's put a lot of strain on a lot of businesses”*

Source: Behaviour and Sentiment Tracker (Mar 22)

Q: And why is that? (Coded)

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

Base: Mar total sample n=900, Think we're going in the 'wrong direction' n=272, Jan total sample n=944, Think we're going in the 'wrong direction' n=261

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  Significantly higher / lower than total

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A significant decline in ‘not knowing when we will return to normal’ aligns with recent government announcements

But the top concern remains the effect on the New Zealand economy

TOP OF MIND CONCERNS ABOUT COVID-19 - TOP 10

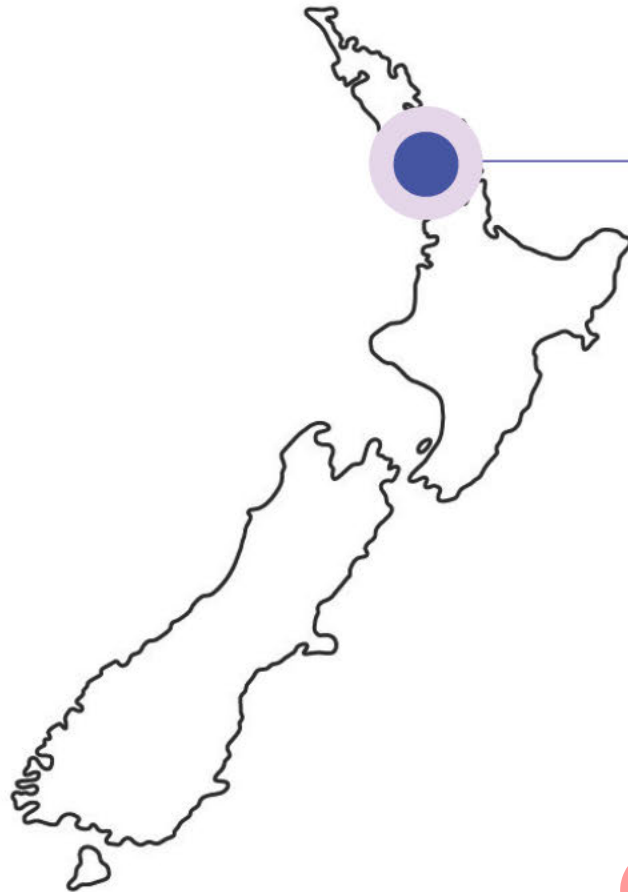
+/- vs. Jan-22



- Almost the entire sample chose a concern from the full list – stable since Jan
- We have seen a significant decline from January in “**not knowing when we will return to normal**” (45%, -8%) as well as “**living in the COVID-19 protection framework**” (23%, -8%).
- In line with peaking case numbers, we have seen a significant increase from January in concern with “**the amount of people getting COVID-19**” (39%, +10%) and the “**health system being overloaded**” (54%, +5%). We have also seen a significant increase in **low socio-economic areas being hit the hardest** (28%, +4%).
- We have seen a significant decline in **concerns about not being able to travel overseas** (28%, -5%).

Source: Behaviour and Sentiment Tracker (Jan 22, Mar 22)
 Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
 Base: Mar 22 total sample n=900, Jan 22 total sample n=944

Level of concern for Aucklanders is lower than RONZ



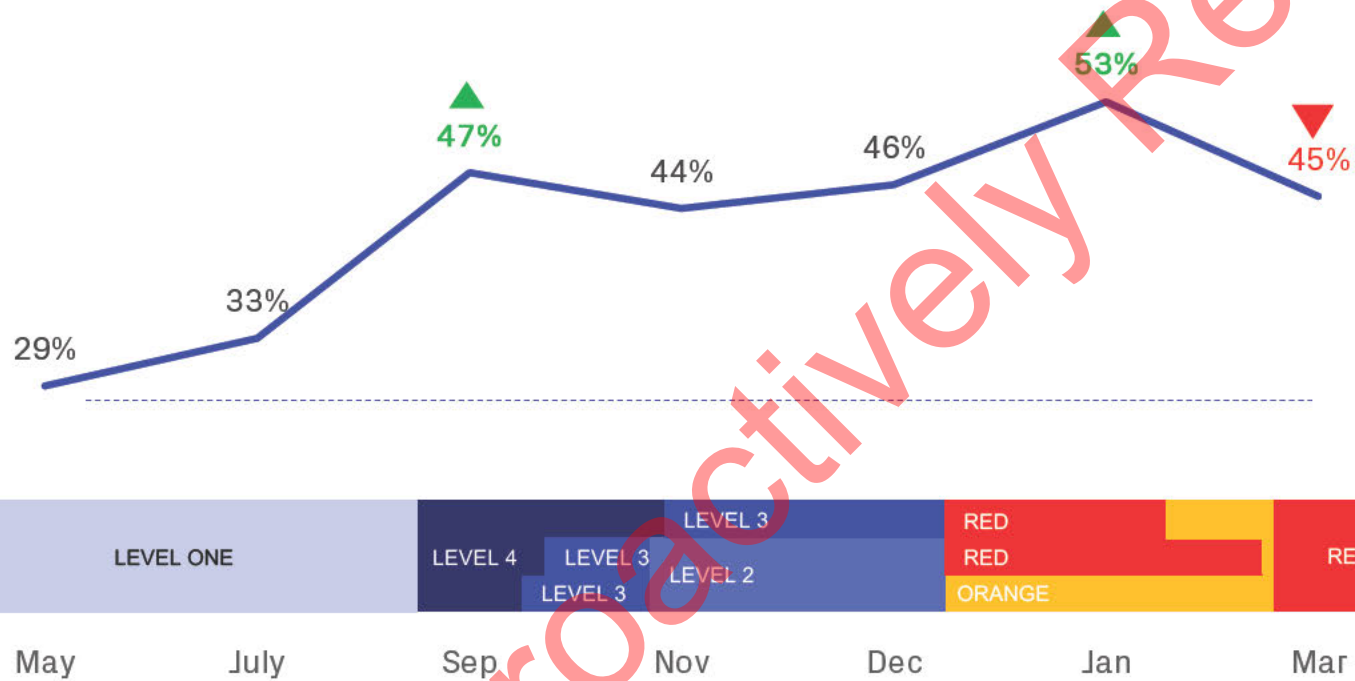
SPOTLIGHT ON AUCKLAND VS. RONZ

- The average number of **concerns are lower** for Auckland than RONZ
- AKL **lower** on “not knowing when we will return too normal” (40%, -7%)
- AKL **lower** on “the impact on my family’s health if they got COVID-19” (35%, -8%)
- AKL **higher** on “not being able to travel overseas” (33%, +8%)
- AKL **higher** on “access for kids and people receiving education” (32%, +7%)

Source: Behaviour and Sentiment Tracker (Mar 22)
 Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
 Base: Mar 22, Auckland n=294, RONZ n=606

As New Zealanders see the light at the end of the tunnel, there is a significant decline in uncertainty

CONCERN ABOUT 'NOT KNOWING WHEN WE WILL RETURN TO NORMAL' – BY WAVE



For the first time, we see a significant drop in concern around 'not knowing when we will return to normal' during the Red Alert Level.

Typically, concern moves with tightening of restrictions, but this point in time is unique due to announcements around a return to normality, despite still being in 'red'.

This is our #5 ranked concern about the impact of COVID-19 on New Zealand, down from #2 in January.

Source: Behaviour and Sentiment Tracker (May 2, Jul 21, Sep 21, Nov 21, Jan 22, Mar 22), 7 Dec Pulse
 Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?

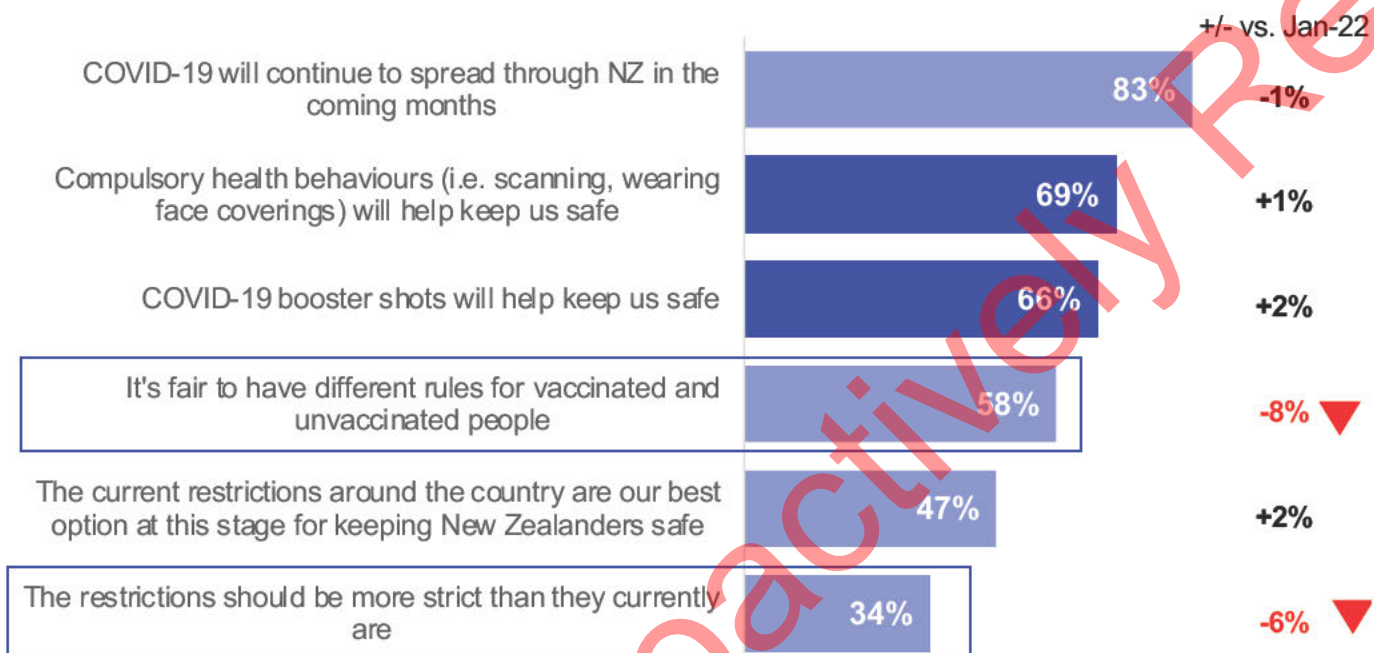
Base: Mar total sample size n=900, Jan total sample n=944, 7 Dec Pulse total sample n=411, Nov 21 total sample n=917, Sep 21 total sample n=846, Jul 21 sample n=823, May 21 sample n=1,853

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▲ ▼ Significantly higher / lower than previous wave

New Zealanders are feeling more comfortable in relaxing restrictions as they see freedom in sight

AGREEMENT STATEMENTS - TOTAL SAMPLE



The gap between believing the booster and health behaviours will keep us safe has closed – evidence that New Zealanders are **increasingly understanding the role of both health behaviours & boosters in keeping us all safe.**

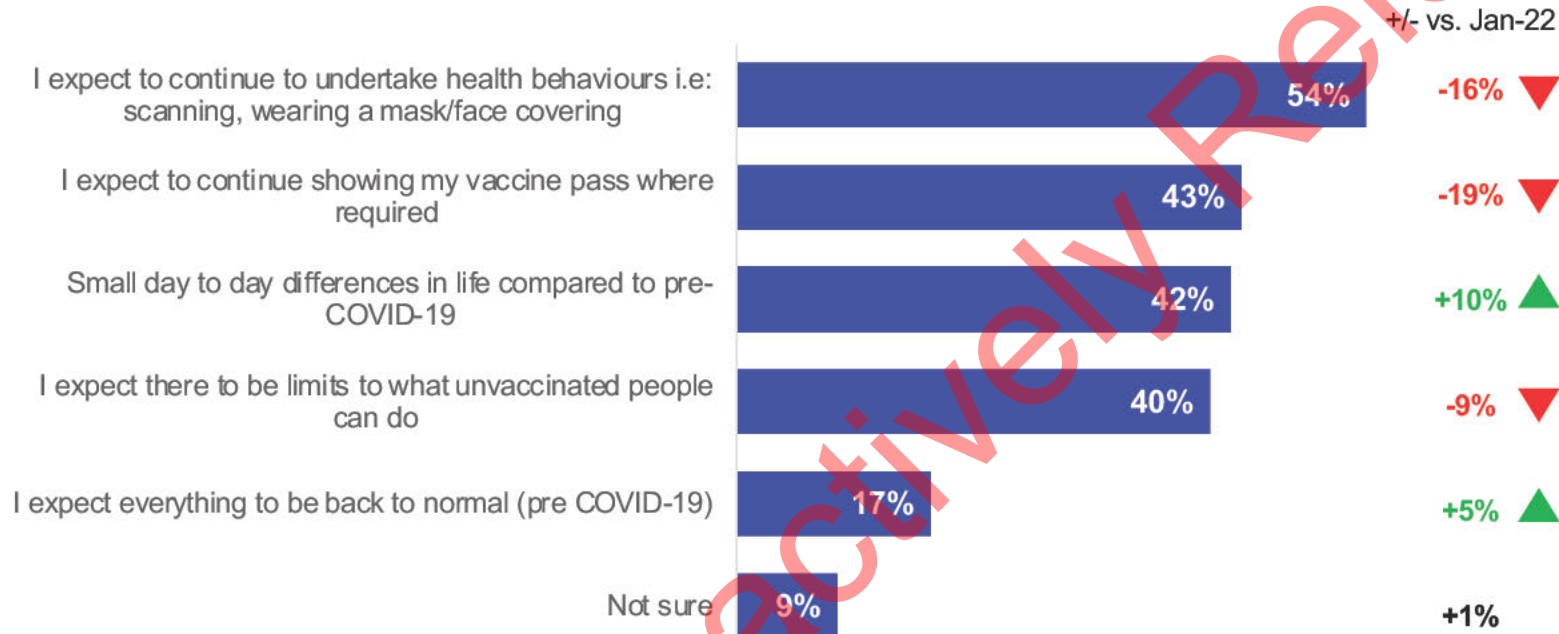
Source: Behaviour & Sentiment Tracker (Mar 22, Jan 22)

Q: Here are some things other people have said. To what extent do you agree or disagree? (NET Agree: strongly agree + agree)

Base: Jan 22 total sample n=944, Mar 22 total sample n=900

There is a shift towards thinking that the next year could return to some form of normality - across all metrics

EXEPCTATIONS OF LIFE IN NEW ZEALAND IN THE NEXT YEAR



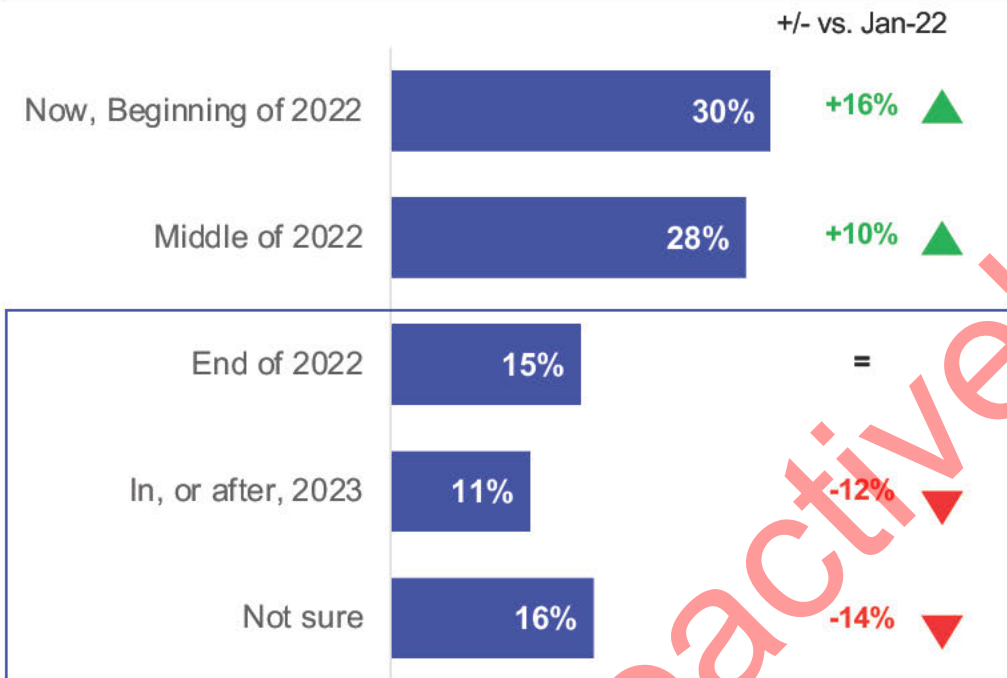
We are seeing quite significant decreases in people expecting to continue with key health behaviours and using vaccine passes.

People are also thinking there will be less limitation for unvaccinated – perhaps influenced by the media briefing re: mandates during fieldwork.

Source: Behaviour and Sentiment Tracker (Jan 22, Mar 22)
 Q: What do you think few will be like in New Zealand in the next year?
 Base: Mar total sample n=900, Jan total sample n=944

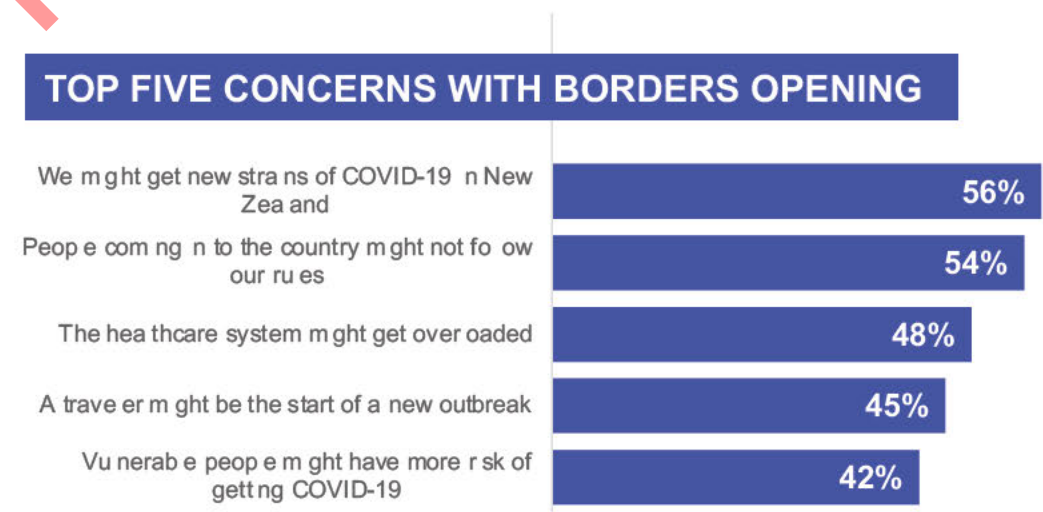
With increased certainty around QFT, there is a lift in those expecting the borders to open sooner

EXPECTATIONS OF WHEN THE BORDER WILL OPEN



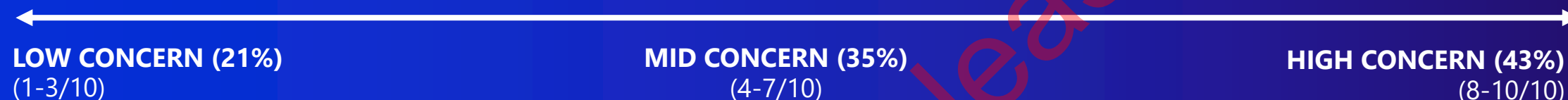
TOP FIVE CONCERNS WITH BORDERS OPENING

With announcements regarding QFT during fieldwork, more New Zealanders are expecting the borders to open now / through to the middle of the year. There is also more certainty about when this should happen (a significant decline in “not sure”).



Source: Behaviour and Sentiment Tracker (Jan 22, Mar 22)
 Q: When do you think we should open our borders to Quarantine Free Travel?
 Q: Which of the following do you agree with in relation to the New Zealand borders reopening?
 Base: Mar total sample n=900, Jan total sample n=944

Despite a positive outlook, there is still a significant group of New Zealanders who have high concern in catching Omicron



HIGHEST CONCERN (21%) (10/10)

Concern is driven by circumstance: skewing more likely than average to have a **disability** (particularly mobility related), **dependents** or **financial woes being out of work**.

Behaviours mirror high concern: this group have the highest **vaccination/booster** rates and levels of preparation for **self isolation**.

They are more likely to agree that the current **restrictions** are **needed** to keep us safe, and think they should be **stricter**. They are less likely to think we **should open the borders** now.

Q: On the scale of 1-10, please select how concerned you are about the possibility of personally catching the Omicron variant of COVID-19.

IMPLICATION

Despite positive shifts in overall sentiment driven by learning to live with COVID-19 and clarity on a plan to move forward, there is still a significant proportion of New Zealanders who have extremely high concern about catching Omicron.

We need to make sure we fully understand this group so we can effectively communicate with them, particularly around reassurance. More on this later...

Information Effectiveness & Behaviours

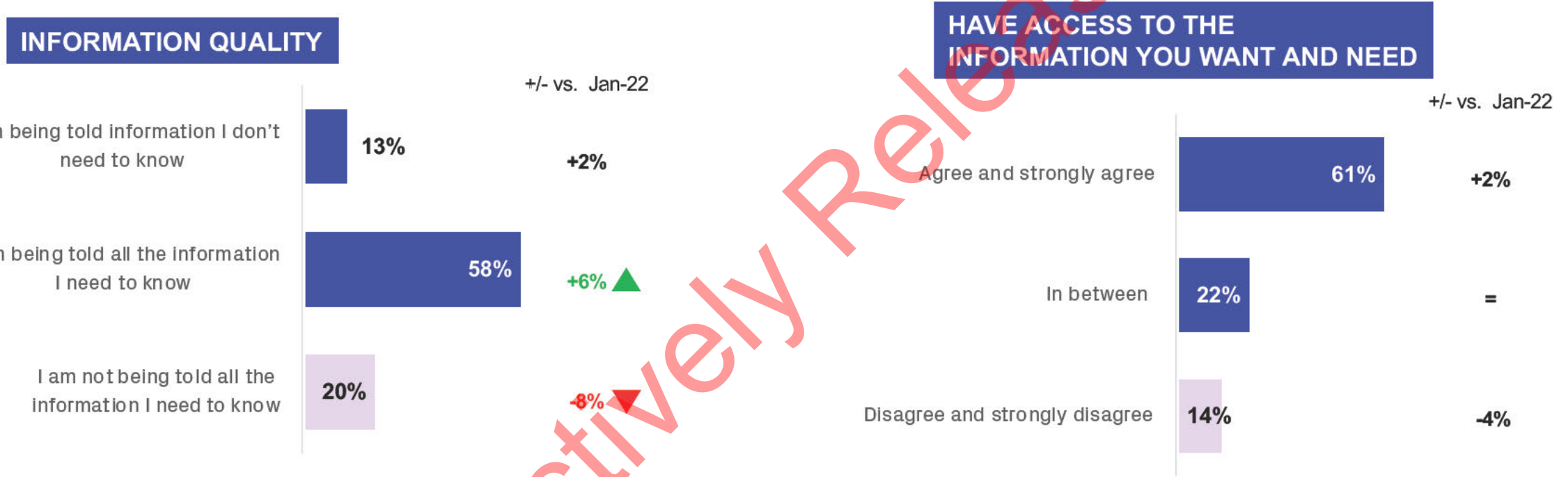
Proactively Released

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INFORMATION EFFECTIVENESS & BEHAVIOURS: KEY OUTTAKES

- The perceived quality of COVID-19 information has improved since January. Subsequently, we are seeing increases in self isolation preparation – evidential that the core messaging/information is effective in changing behaviours.
- Not being able to take time off work is a main barrier to not wanting to isolate – and this is driven by both the female population and self-employed.
- Information receptiveness is aligning with the current messages being pushed to the public.
- But there is a general decline in seeking COVID-19 information as New Zealanders learn to live with COVID-19 in the community/live through the peak.
- Revisiting our 'highest concerned' group, information will need to be targeted to effectively reach and reassure these people.

Information quality and access has seen an uplift from January



SPOTLIGHT ON NZERS WHO THINK THEY AREN'T BEING TOLD/ DON'T HAVE ACCESS TO ALL THE INFO THEY NEED TO KNOW
 These people are more likely to have **low concern about getting Omicron**, say they are **definitely not getting the booster**, and think we are heading in the **wrong direction**.

Source: Behaviour and Sentiment Tracker (Jan-22 Mar-22)
 Q How do you feel about the quality of information about COV D-19 that is currently being provided on what you need to do?
 Q From everything you've seen or heard about COV D-19 do you agree that you have access to all the information you want and need?
 Base: Mar-22 total sample n=900 Jan-22 total sample n=944

Other information that New Zealanders would find helpful is centred around clarity & detail

INFORMATION NEEDS – OF THOSE WHO WANT TO KNOW MORE INFORMATION

Clarity on rules

“I just seems to be forever changing and I cant keep up with the latest rules”

“There is so much changing information I have given up trying to keep up. If/when I get it I’ll work out rules then but continue to distance and mask wear”

“Clarity on the constantly changing rules.”

Facts & details

“Data about current spread that’s deeper than just daily case numbers”

“Facts not opinions or trends”

“Detailed information in case you get affected.”

“How many vaccinated and how many unvaccinated are catching it and their recovery times.”

The effect of Omicron

“How many of the hospitalised people with Omicron are vaccinated?”

“How (many) Omicron cases everyday separated from normal covid”

“How much capacity does healthcare system have available”

“I think Government has not emphasised to the general public the long term effects of Covid enough”

There is also a group of NZers who simply believe the information they are seeing is inaccurate

“Actual dates, actual numbers, actual faith”

“Accurate statistics relating to mortality, causes and outcomes of the infection etc”

“Getting the actual number of those getting infected and tell it how it really is”

“Government and scientists saying the truth”

“I don’t believe we are getting the true figures.”

“I feel like I get enough information it’s just a matter of whether or not it is true information.”

Source Behaviour and Sentiment Tracker (Mar-22)

Q What other information would you find helpful?

Base Mar-22 not being told info need to know or does not have all the info they want and need sample n=288

New Zealanders are increasingly seeing messaging around plans to re-open the border & COVID-19 spreading

“YOU SEE OR HEAR ABOUT IT ALL THE TIME”	MAR-22	JAN-22	+/- vs. JAN-22
Omicron	51%	57%	-7% ▼
COVID-19 spreading in the community	44%	37%	+7% ▲
* COVID-19 booster shots	44%	-	-
Wearing a mask	43%	53%	-10% ▼
Staying home and getting a test if sick	41%	44%	-3%
* Taking a RATs test and officially recording the result	34%	-	-
What to do if you get COVID-19	32%	29%	+3%
Vaccination passes	29%	39%	-10% ▼
* Isolation requirements	27%	-	-
Be ready and have a plan if you get COVID-19	24%	25%	-1%
Plans to re-open the New Zealand border	22%	11%	+11% ▲
Mandatory record keeping with the NZ COVID Tracer app or manual records	20%	31%	-11% ▼
The ‘COVID-19 Protection Framework’ (traffic light system)	19%	35%	-16% ▼
When 5 to 12 year olds can get vaccinated	18%	25%	-7% ▼
New COVID-19 variants	16%	31%	-15% ▼
MIQ places and facilities	11%	20%	-9% ▼

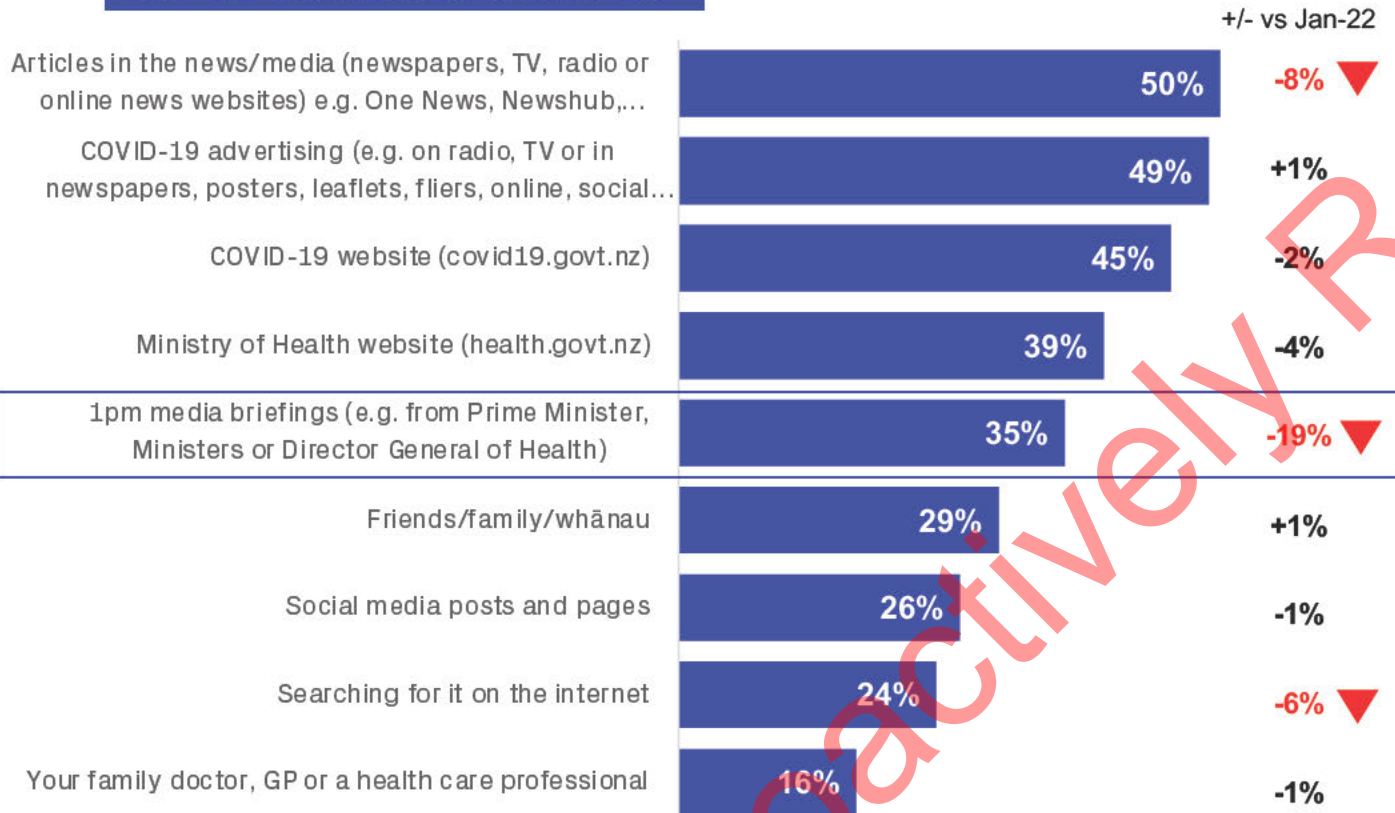
We have seen uplifts in messaging visibility for **COVID-19 spreading in the community** (44%, +7%) and **plan to re-open the NZ border** (22%, +11%) – reflecting the shifting COVID-19 environment and awareness of the latest border announcement.

The largest significant declines are the COVID-19 Protection Framework (19%, -16%) and new COVID-19 variants (16%, -15%).

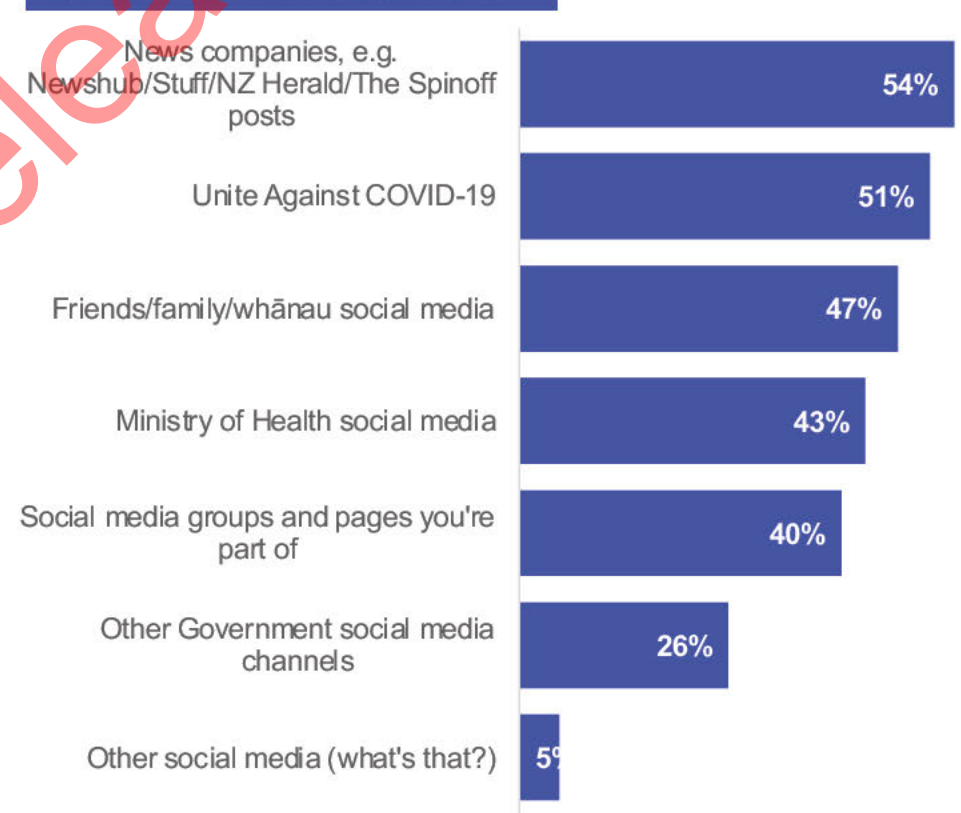
Source: Behaviour and Sentiment Tracker (Jan-22 Mar-22)
 Q: Lately how much are you seeing or hearing about ... (see or hear about it all the time)
 *Base: Jan-22 total sample n=944 Mar-22 total sample N=900

News articles and COVID-19 advertising are top information sources; media briefings shifts significantly down the list

TOP INFORMATION SOURCES



SOCIAL MEDIA SOURCES



Source: Behaviour and Sentiment Tracker (Mar-22, Jan-22, Mar-22)

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, restrictions, the COVID-19 vaccine, etc.?

Q: What social media sources are you using?

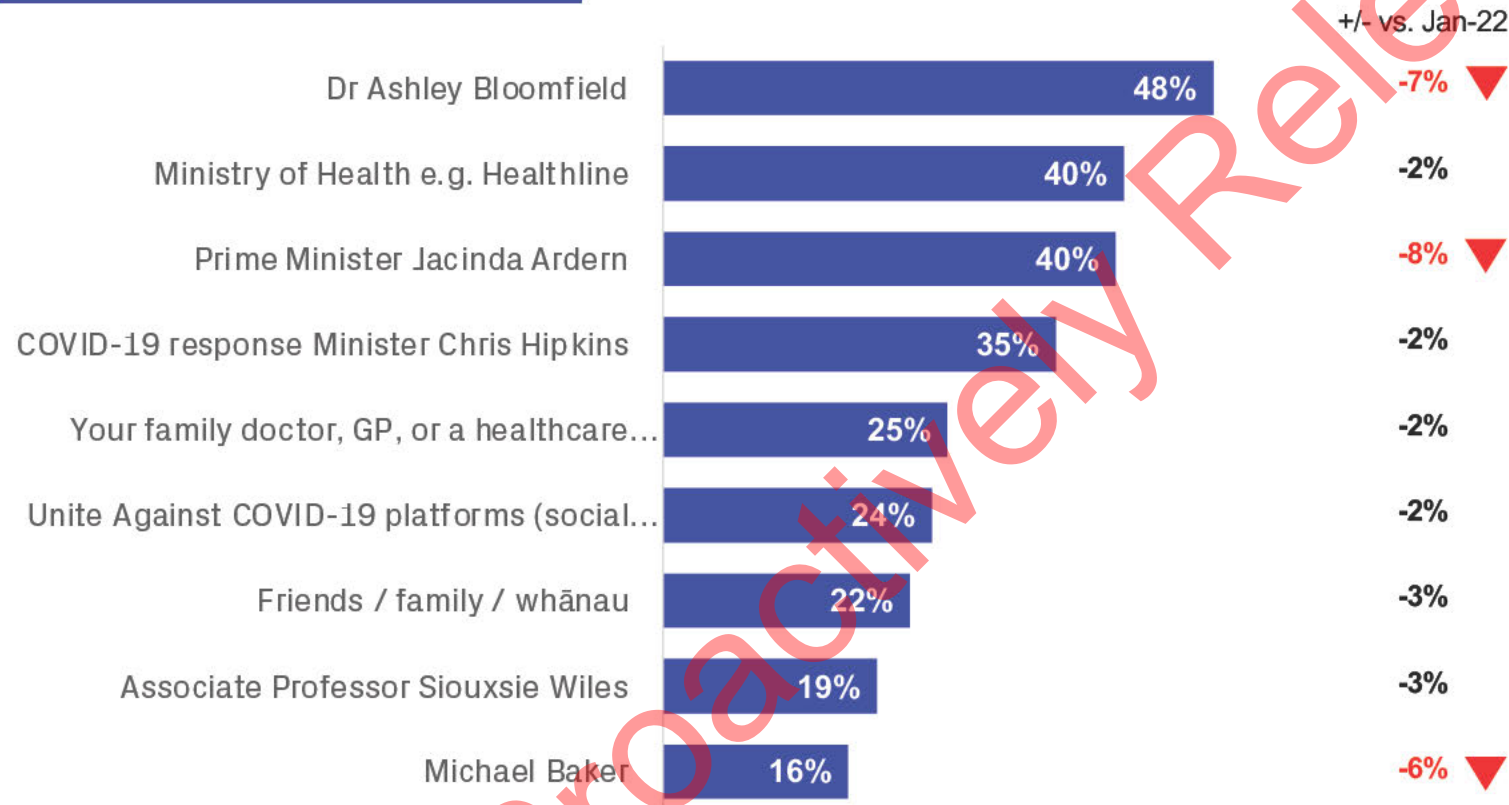
Base: Mar-22 total sample n=900, Jan-22 total sample n=944, Mar-22 total sample N=900, social media sources N=185

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▲ ▼ Significantly higher / lower than Nov-21

Prominent figureheads and organisations continue to be sought out for information on COVID-19

TOP COVID-19 INFLUENCERS



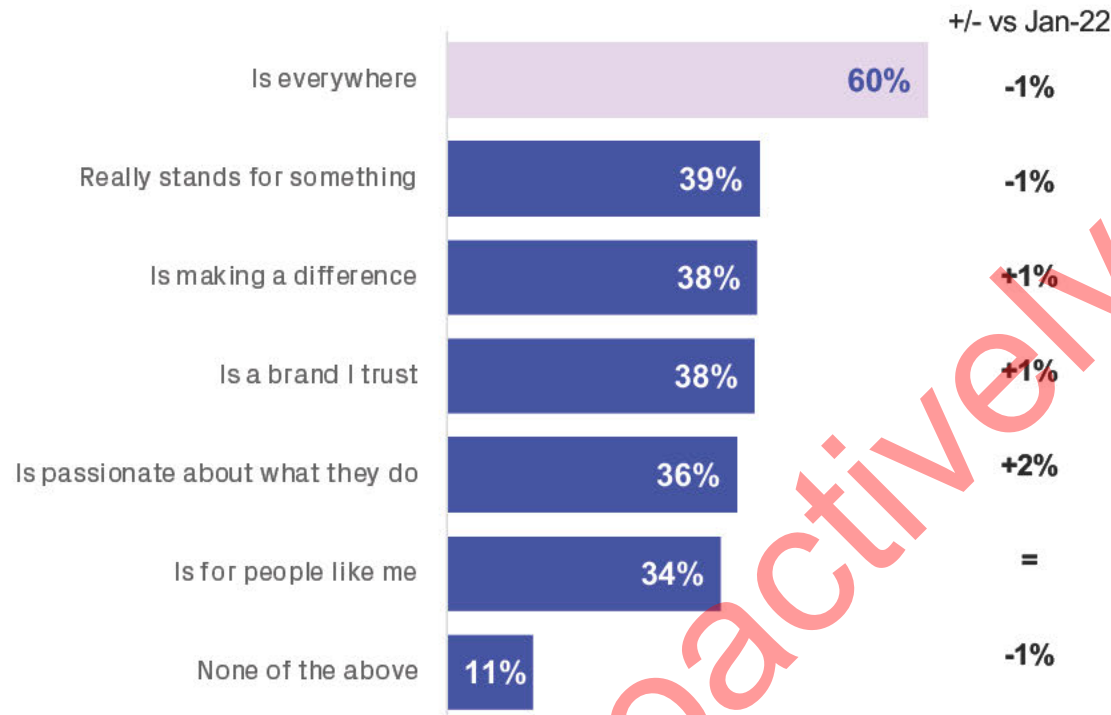
Prominent figureheads like Dr. Ashley Bloomfield, MoH and PM Jacinda Ardern continue to sit as top opinion leaders.

But overall 'seeking of opinions' is trending down.

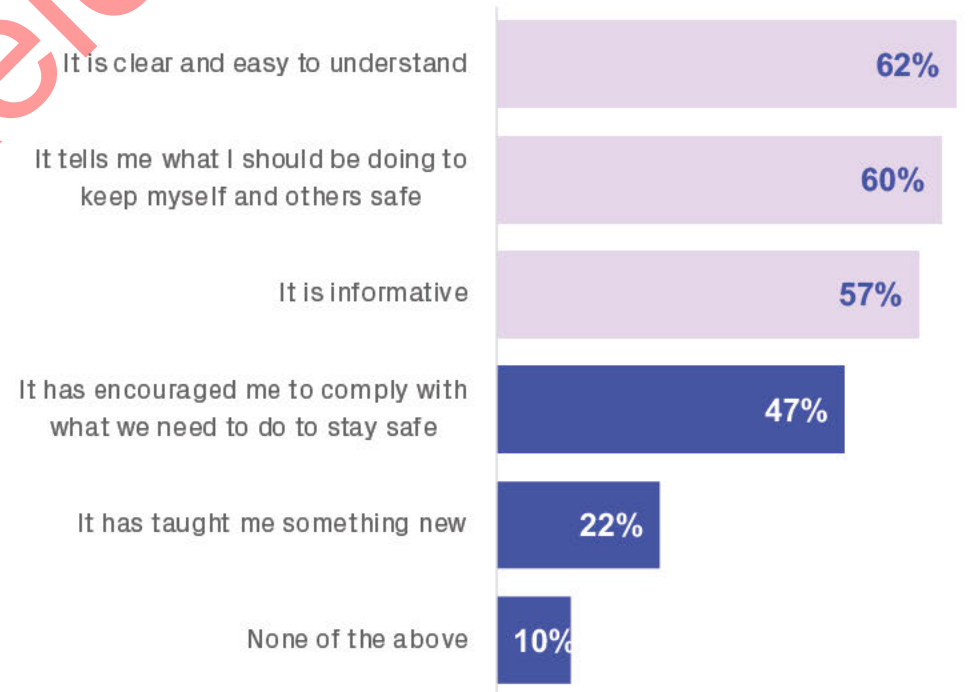
Source: Behaviour and Sentiment Tracker (Nov-21, Jan-22, Mar-22)
 Q: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?
 Base: Mar-22 n=714, Jan-22 n=944, Nov-21 total sample n=917

UAC brand associations are stable, and the brand is perceived to be clear, directional and informative

ASSOCIATIONS WITH THE 'UNITE AGAINST COVID-19' BRAND



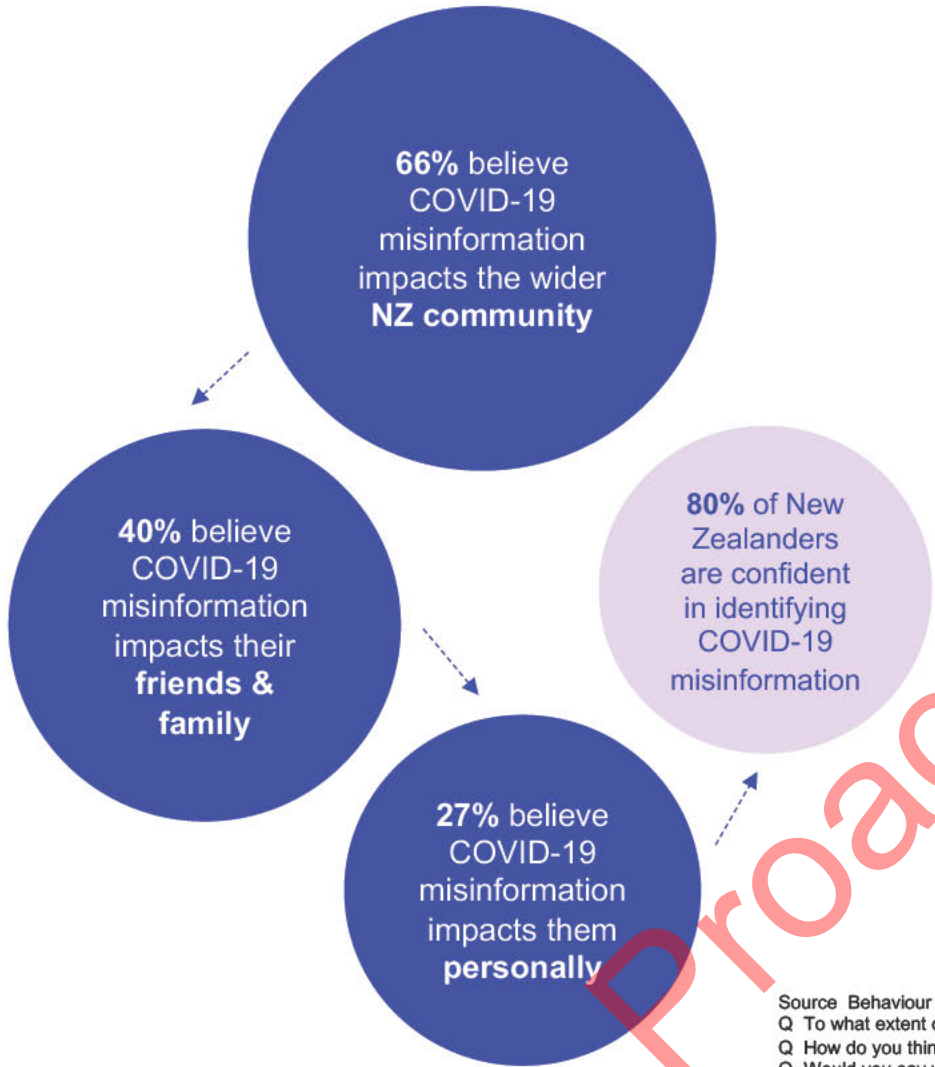
'UNITE AGAINST COVID-19' BRAND EFFECTIVENESS



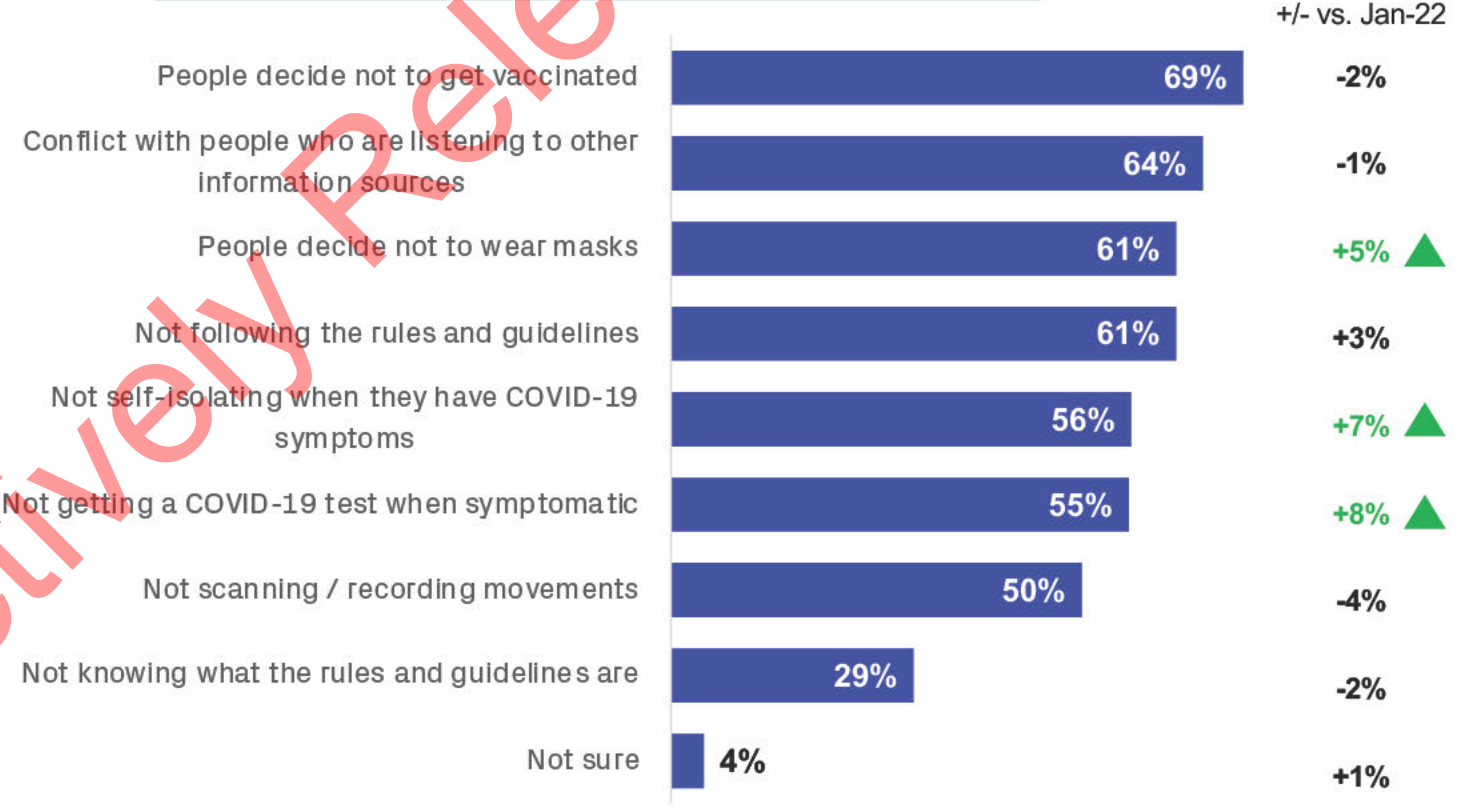
Source Behaviour and Sentiment Tracker (Nov-21 Jan-22 Mar-22)
 Q Do you feel that Unite Against COVID-19 ?
 Base Mar-22 total sample n=900 Jan-22 total sample n=944 Nov-21 total sample n=917

New Zealanders are generally quite confident in identifying misinformation on COVID-19

And think the largest impact of misinformation is vaccination rates being affected



HOW DOES MISINFORMATION AFFECT NZers?



Source Behaviour and Sentiment Tracker (Jan-22 Mar22)
 Q To what extent do you think COVID-19 related misinformation impacts ...
 Q How do you think COVID-19 misinformation impacts you your friends and family or the wider New Zealand community?
 Q Would you say you are confident in identifying misinformation across any of the following topics?
 Base Jan-22 total sample n=944 Mar-22 total sample n=900

New Zealanders who are personally affected by misinformation are more likely to get information from unofficial sources

Compared to those who don't think COVID-19 misinformation affects them personally...

DEMOGRAPHICS

- **Skew younger** (under 40)
- Less likely to be NZ European (50%, -22%), more likely to be **Māori** (20%, +9%), **Pasifika** (10%, +5%) or **Asian** (22%, +9%)
- More likely to have **dependents 5-11** (30%, +14%)

INFORMATION

- More likely to get their COVID-19 information from **friends/family/whānau** (38%, +12%), **social media posts & page** (35%, +13%), **community groups** (15%, +5%) and **iwi/Māori groups/kaumātua** (5%, +4%)
- When looking at barriers to getting a COVID-19 test, they're more likely to think **it's hard to know the truth about what to do** (26%, +10%) & **'not being sure where to get information from'** (23%, +9%)

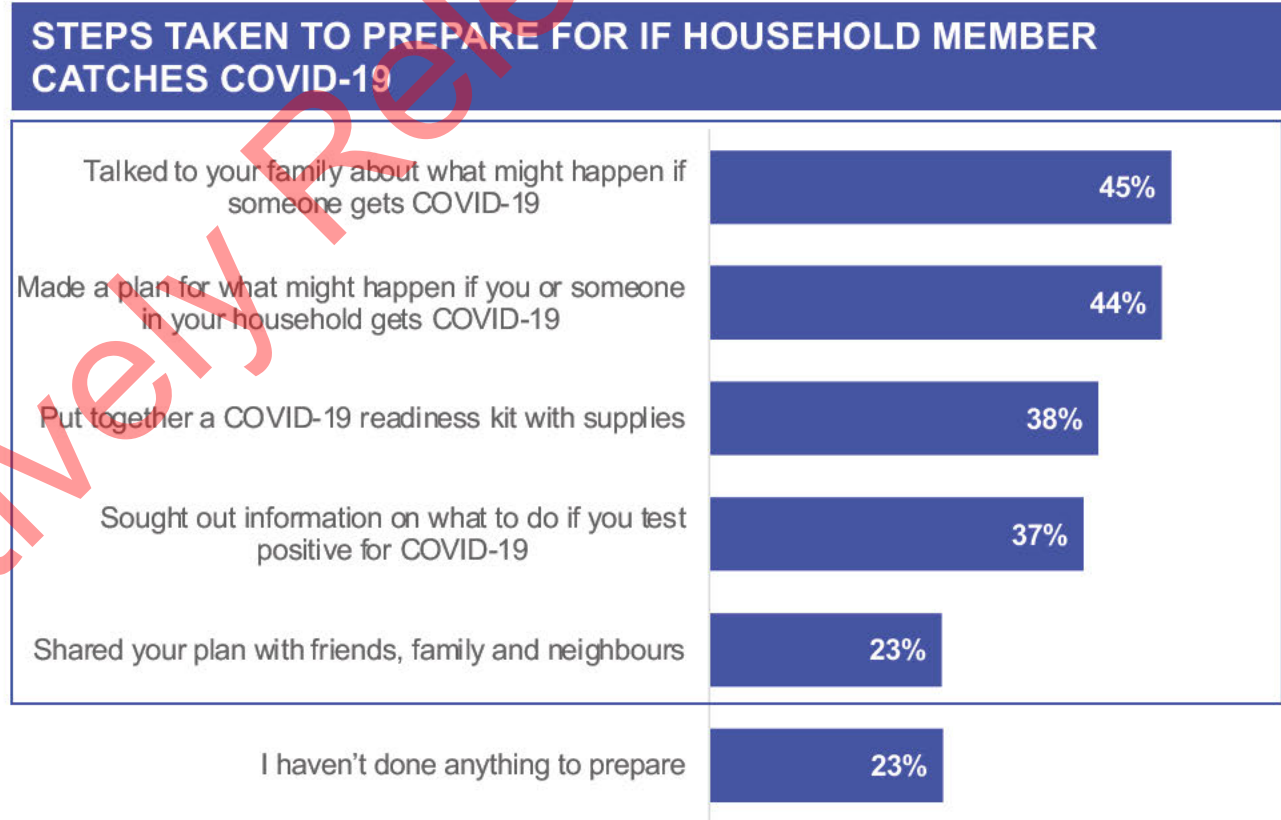
27% believe
COVID-19
misinformation
affects them
personally

Messaging is working – there is a significant increase in New Zealanders prepared for isolation

Top steps taken are talking to family about what might happen, and making a plan for someone in your household getting COVID-19

+14% ▲
77%

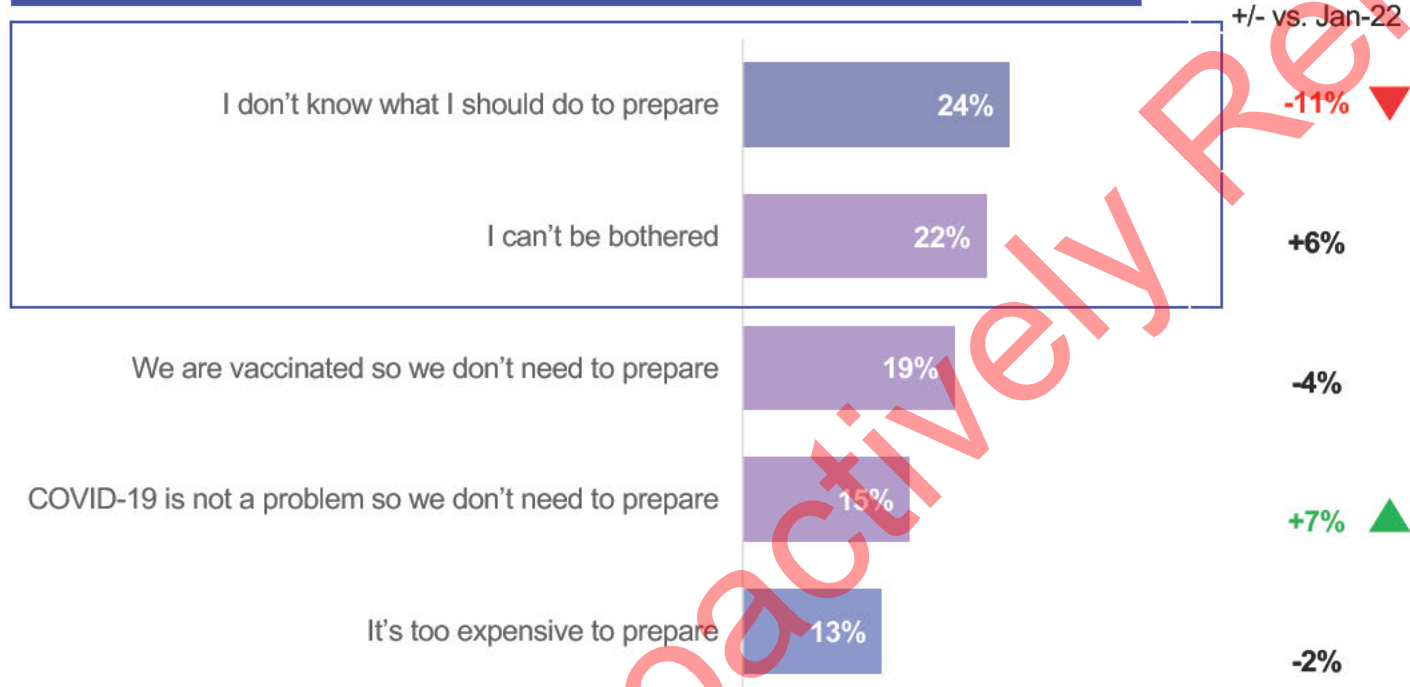
of New Zealanders have taken at least one step to prepare for someone in their household getting COVID-19



Source: Behaviour & Sentiment Tracker (Jan 22, Mar 22)
 Q: What steps, if any, have you taken to prepare for someone in your household getting COVID-19?
 *See slide 55 for geographic breakdown
 Base: Mar 22 total sample n=900, Jan 22 total sample, n=944

The top barrier “not knowing what to do to prepare” is declining as information becomes more readily available

BARRIERS TO PREPARATION – OF THOSE WHO HAVEN'T DONE ANY THING TO PREPARE FOR SELF-ISOLATION



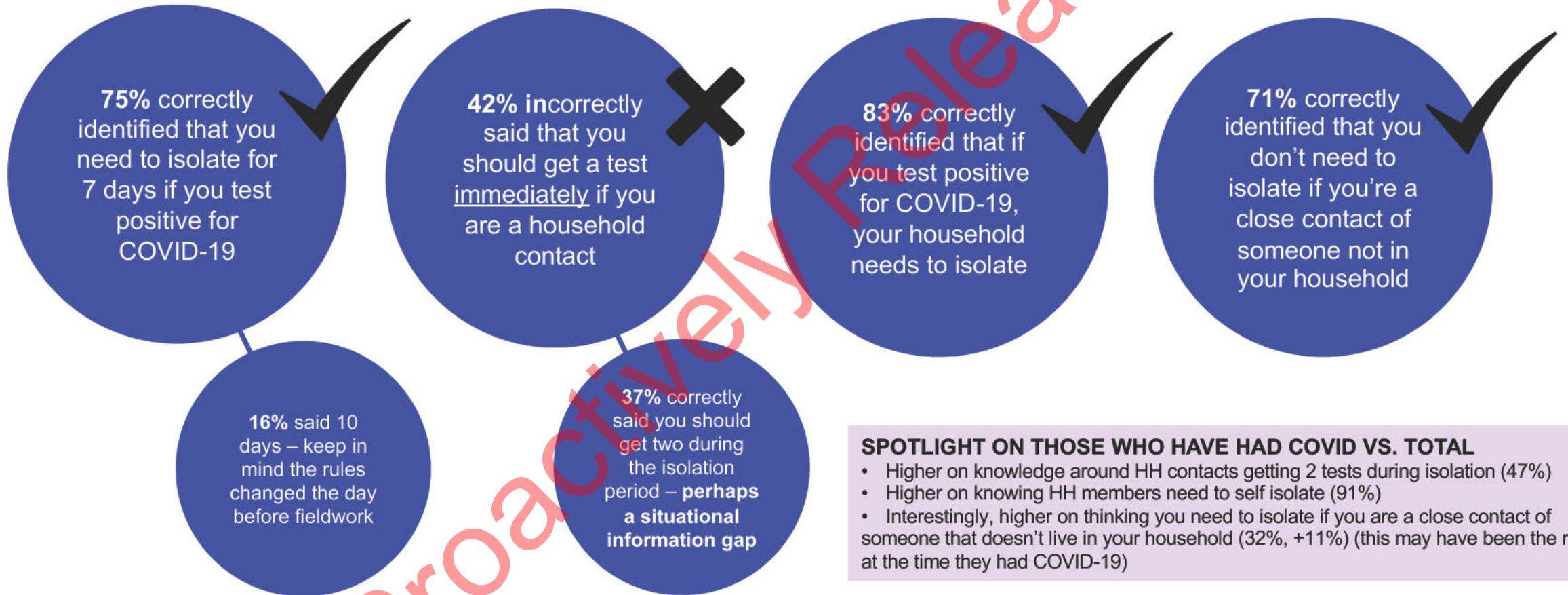
There has been a significant improvement on the informational barrier – those who don't know what to do to prepare is down by -11% since January.

There has been an uptick in those whose barrier is thinking COVID-19 is not a problem, +7% since January.

- Functional barrier
- Attitudinal barrier
- Informational barrier

Source: Behavior & Sentiment Tracker Jan 22 Mar 22
 Q: And are there any reasons you have not prepared your household for COVID 19?
 Base: Jan 22 those who haven't done anything to prepare n=345, Mar 22 n=208

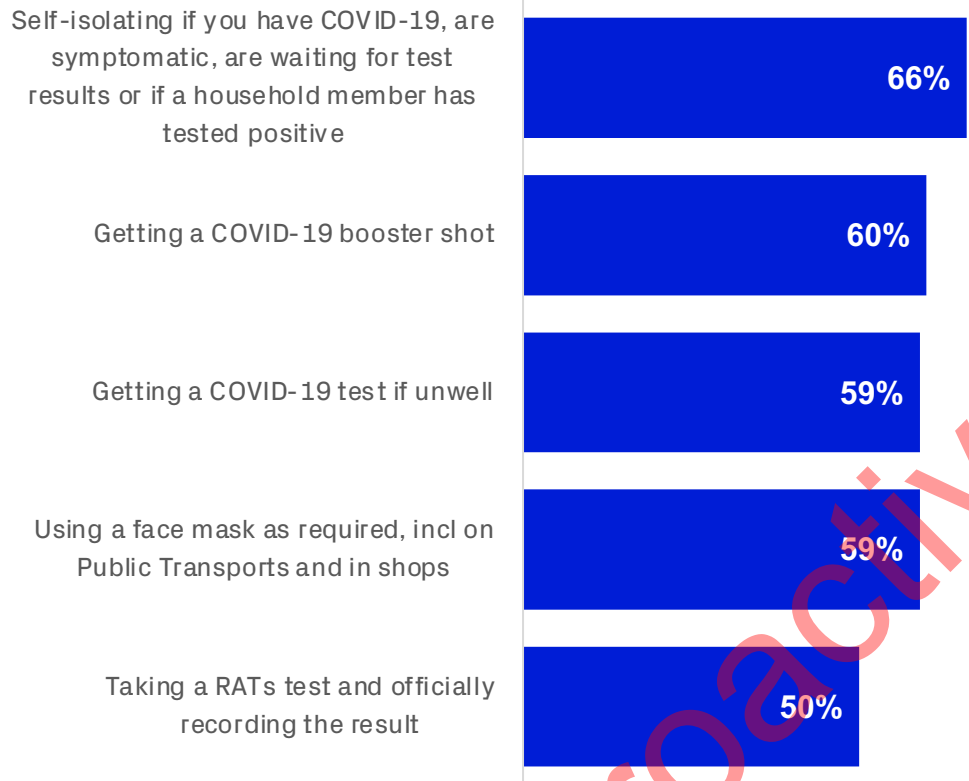
The top health behaviour message that is sticking with New Zealanders is around isolation requirements



Source Behaviour & Sentiment Tracker (Mar-22)
 Q How long do you need to isolate if you test positive for COVID-19? Q If you are a household contact should you get a COVID-19 test?
 Q If you test positive for COVID-19 do the members of your household also need to isolate? Q Do you need to isolate if you are a Close Contact of someone who does not live in your household?
 Base Mar-22 total sample n=900

Isolation is the top health behaviour perceived as being effective in stopping the spread of Omicron and keeping NZers safe

EFFECTIVENESS (VERY EFFECTIVE)



Self-isolation is seen as the most effective measure (66%), whilst taking a RATs test and officially recording the result is the weakest (50%).

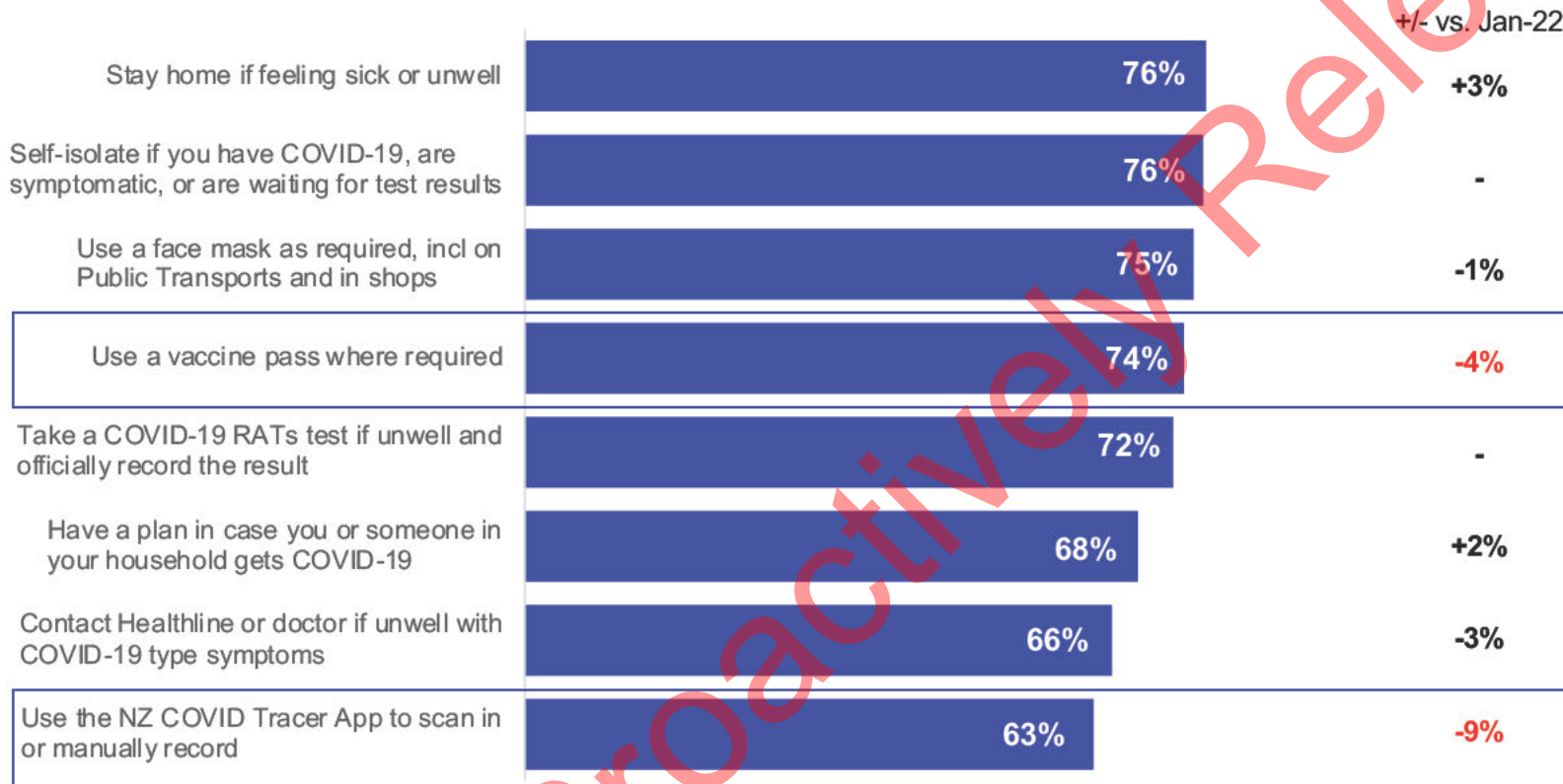
SPOTLIGHT ON NZERS WHO THINK WE ARE HEADING IN THE WRONG DIRECTION (Deniers & Rebels)

These people have a lower perceived effectiveness of health behaviours

Source: Behaviour & Sentiment Tracker (Mar 22)
 Q: How effective do you think each of these can be in slowing the spread of Omicron and keeping New Zealanders safe?
 Base: Mar 22 total sample n=900

There have been significant declines in willingness to use vaccine passes and the NZ COVID Tracer App

WILLINGNESS TO COMPLY (VERY WILLING, HAPPY TO DO MY PART)



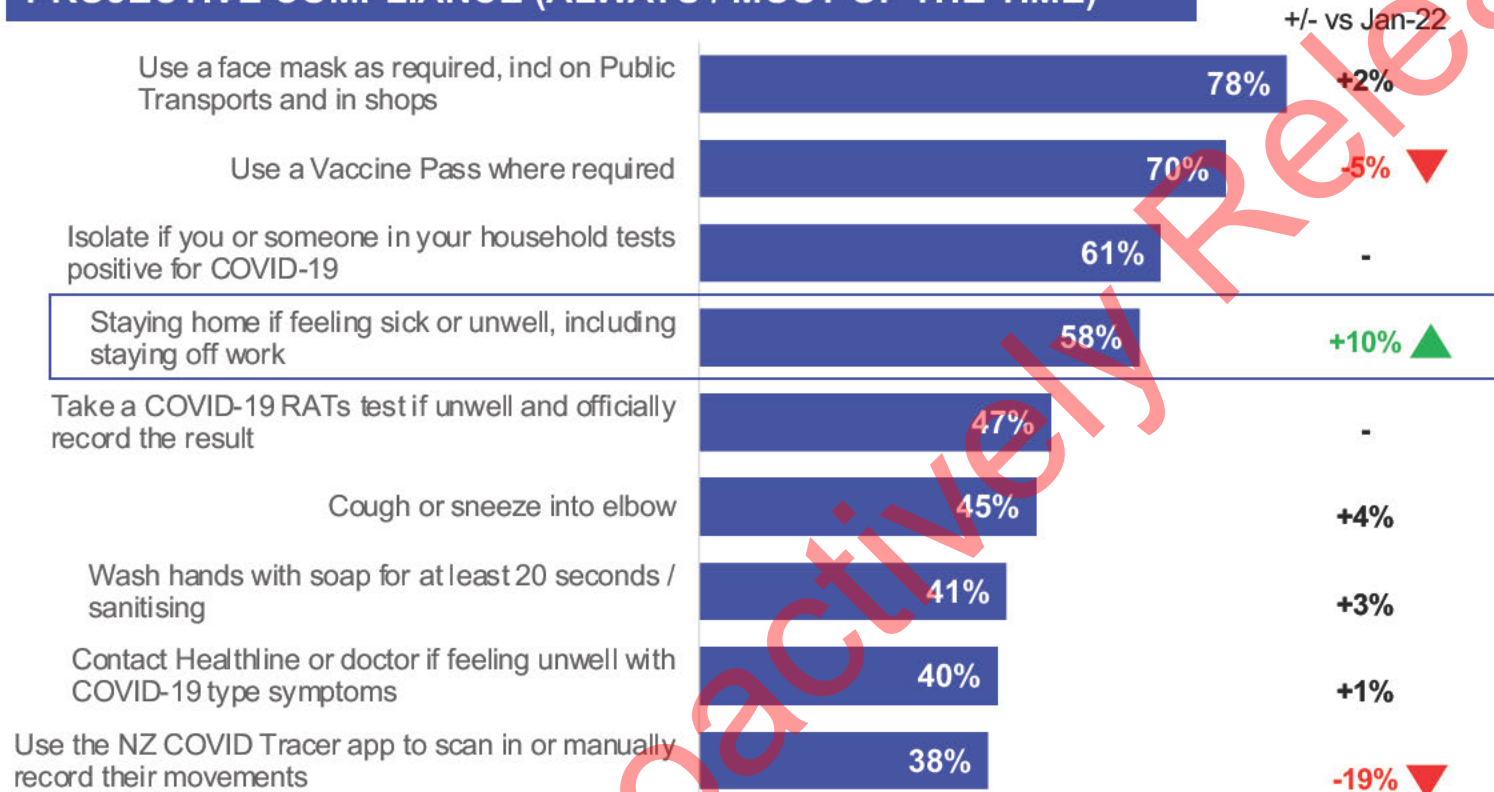
Compared to January, we have seen declines in willingness across:

- Using the COVID tracer app (63%, -9%)
- Using a vaccine pass where required (74%, -4%)

Source: Behaviour and Sentiment Tracker (Nov 21, Jan 22, Mar 22) & 7 Dec Pulse
 Q: How willing are you to do the following? (Very willing, happy to comply)
 Base: Mar 22 total sample n=900, Jan 22 total sample n=944, 7 Dec Pulse total sample n=411, Nov 21 total sample n=917

There has been a significant increase in compliance for staying home if unwell

PROJECTIVE COMPLIANCE (ALWAYS / MOST OF THE TIME)



There has been a significant increase in staying home if feeling sick or unwell, including staying off work (58%, +10% since Jan)

Significant decreases include:

- Using the NZ COVID Tracker app (38%, -19% since Jan)
- Using a vaccine pass when required (70%, -5% since Jan)

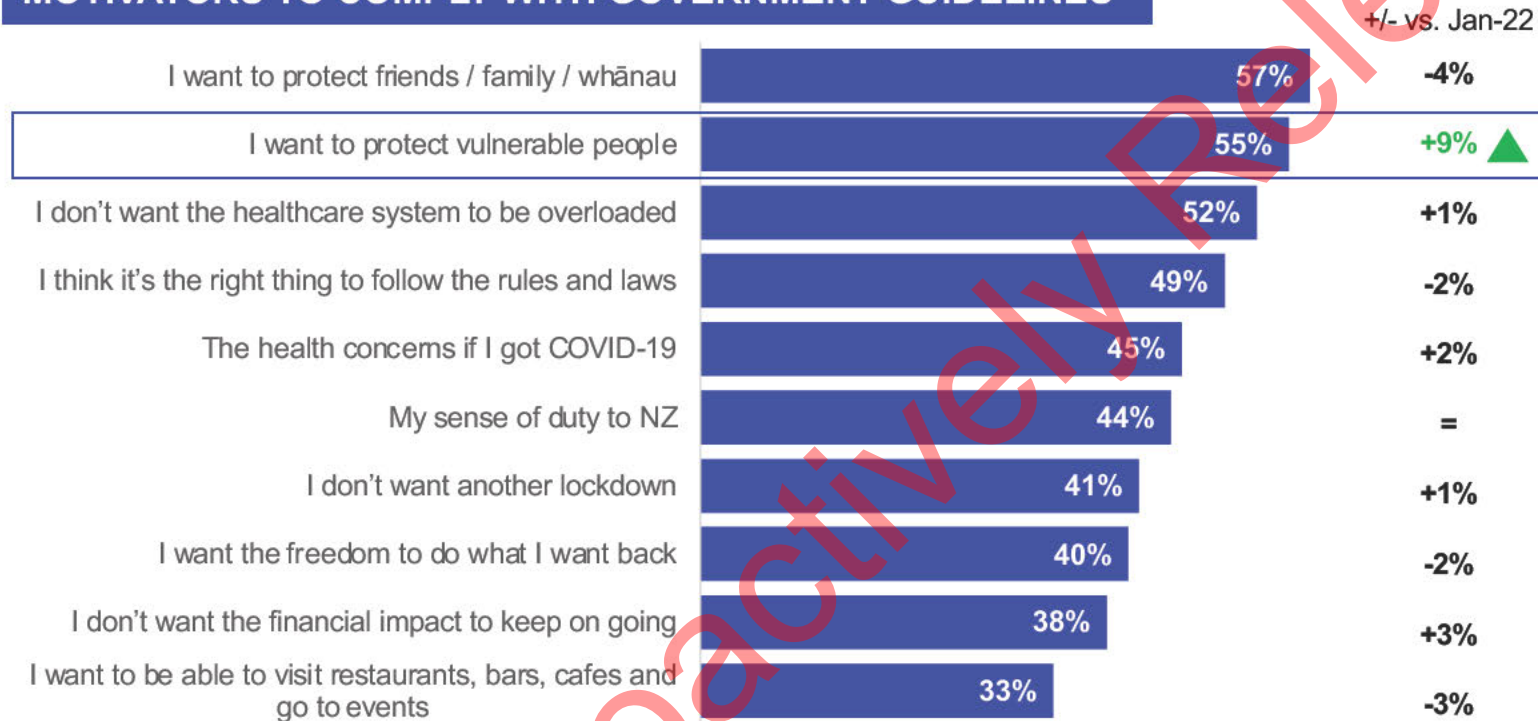
SPOTLIGHT ON NZERS WHO HAVE PERSONALLY HAD COVID-19

These people are more likely to have **higher compliance across most behaviours**

Source: Behaviour & Sentiment Tracker (Nov 21, Jan 22, Mar 22) & 7 Dec Pulse
 Q: How often do you think other New Zealanders do the following? (always + most of the time)
 Base: : Mar 22 total sample n=900, Jan 22 total sample n=944, 7 Dec pulse check total sample n=411, Nov 21 total sample n=917

The top motivator for compliance remains protecting friends & family, but we have seen a significant shift in those wanting to protect NZ's most vulnerable

MOTIVATORS TO COMPLY WITH GOVERNMENT GUIDELINES



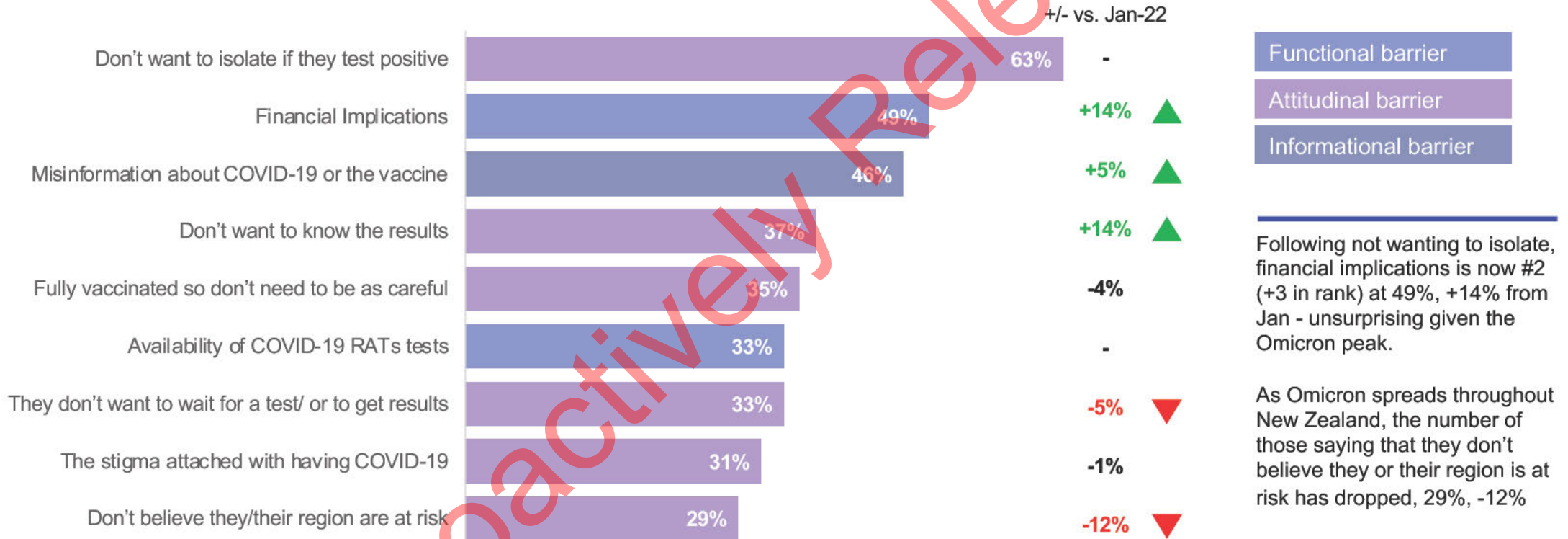
Motivations to comply are largely stable with protecting friends and family (57%) being the #1 motivation.

But we have seen a sig increase in protecting **vulnerable people** (55%) which is now +9% from Jan and +2 in rank.

Source: Behaviour & Sentiment Tracker (Jan 22, Mar 22)
 Q: Which of the following are most key to make you want to follow the Government's public health COVID-19 guidelines?
 Base: Jan 22 total sample n=944, Mar 22 total sample n=900

New Zealanders not wanting to isolate if they test positive is the #1 barrier to getting tested for COVID-19

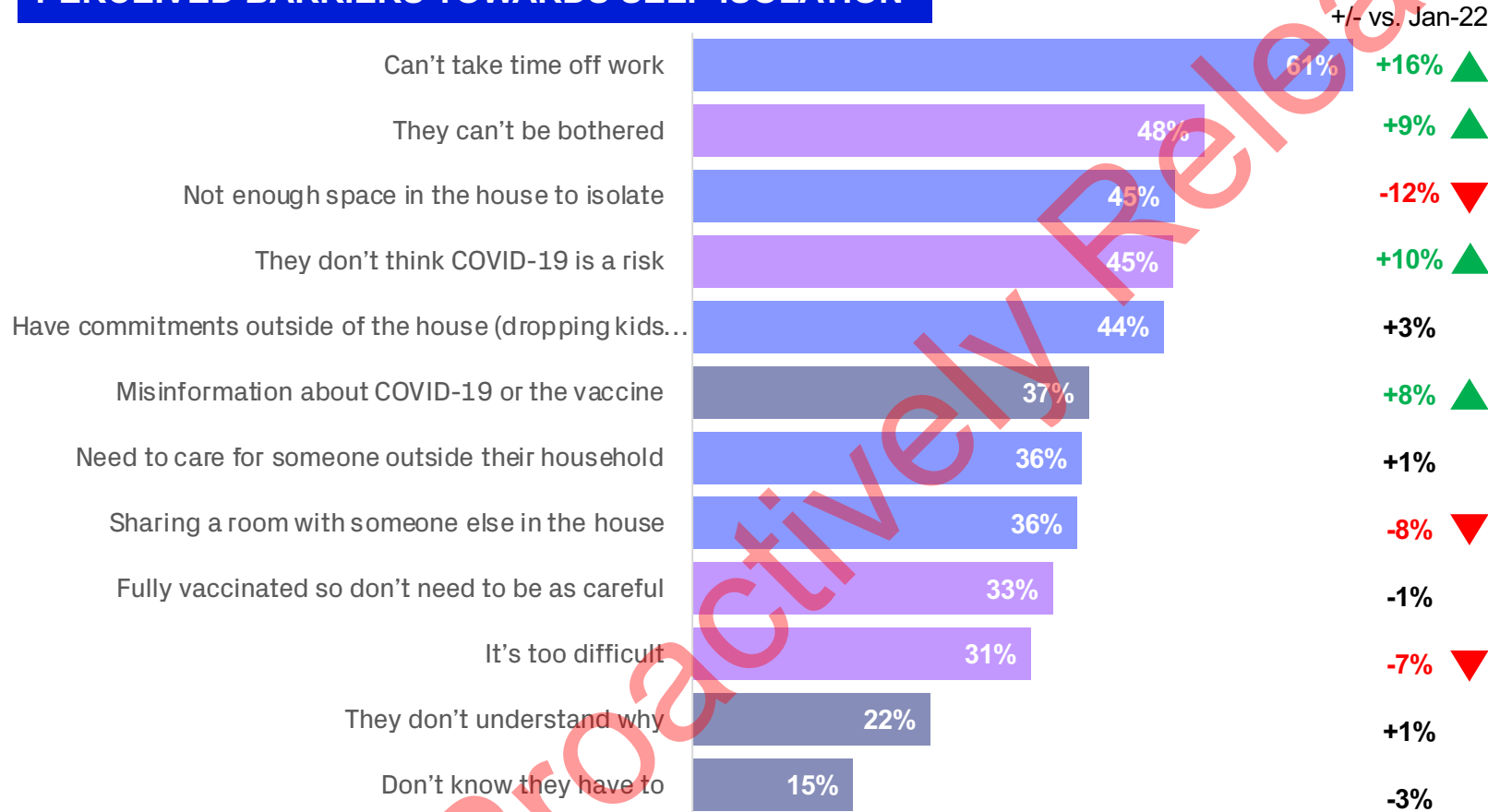
BARRIERS TO GETTING TESTED FOR COVID-19



Source: Behaviour & Sentiment Tracker (Nov 21, Jan 22, Mar 22)
 Q: What do you think might stop other people from doing things like getting a COVID-19 test?
 Base: Mar 22 total sample n=900, Jan 22 total sample n=944, Nov 21 total sample n=917

Not being able to take time off work to isolate has significantly increased since January

PERCEIVED BARRIERS TOWARDS SELF-ISOLATION



- Functional barrier
- Attitudinal barrier
- Informational barrier

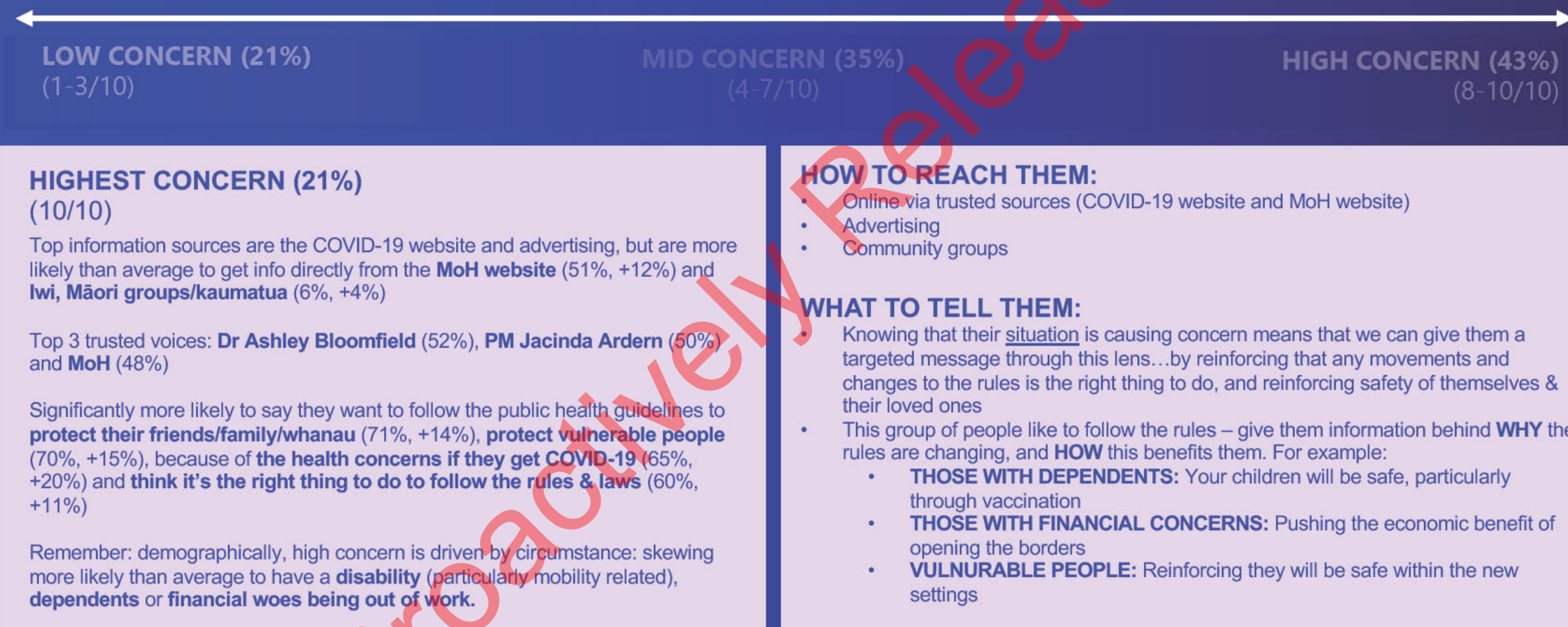
The **leading barrier** for self-isolation is **functional** – **not being able to take time off work**. This has significantly increased from January now at 61% (+16% from Jan).

The top barriers are mainly a mix of functional & attitudinal – informational is less of an issue.

“Can't take time off work” skews female (70%), in particular female 35-54y (72%) and self-employed (84%),

Source: Behaviour & Sentiment Tracker (Jan 22, Mar 22)
 Q: What do you think might stop other people from self-isolating from others in their household, if they have COVID-19, are symptomatic, or awaiting test results?
 Base: Mar 22 total sample n=900, Jan 22 total sample n=944

There is a need for targeted messaging for those within the highest concern – underpinned by reassurance



IMPLICATION

- 1) Despite key COVID-19 messaging showing effectiveness for the majority of New Zealanders, the group of highly concerned need tailored and targeted messaging to provide reassurance.
- 2) The key barrier to self isolation is centred around not being able to take time off work – this is driven by females and self-employed.

Productively Released

Vaccine & Booster
Shots

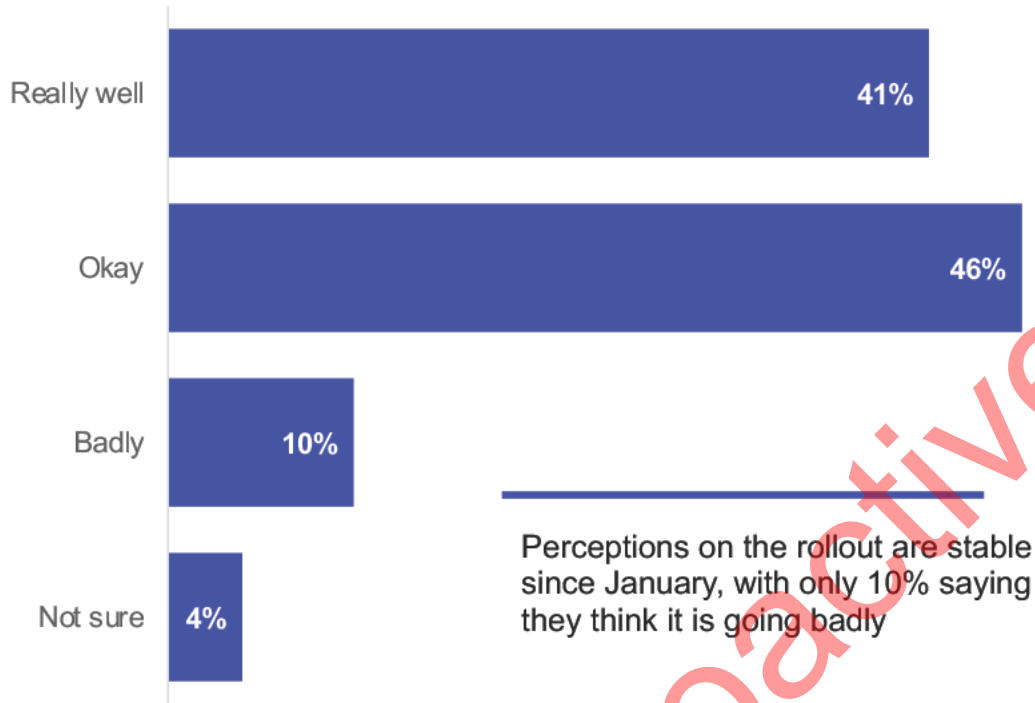
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VACCINE & BOOSTER SHOTS: KEY OUTTAKES

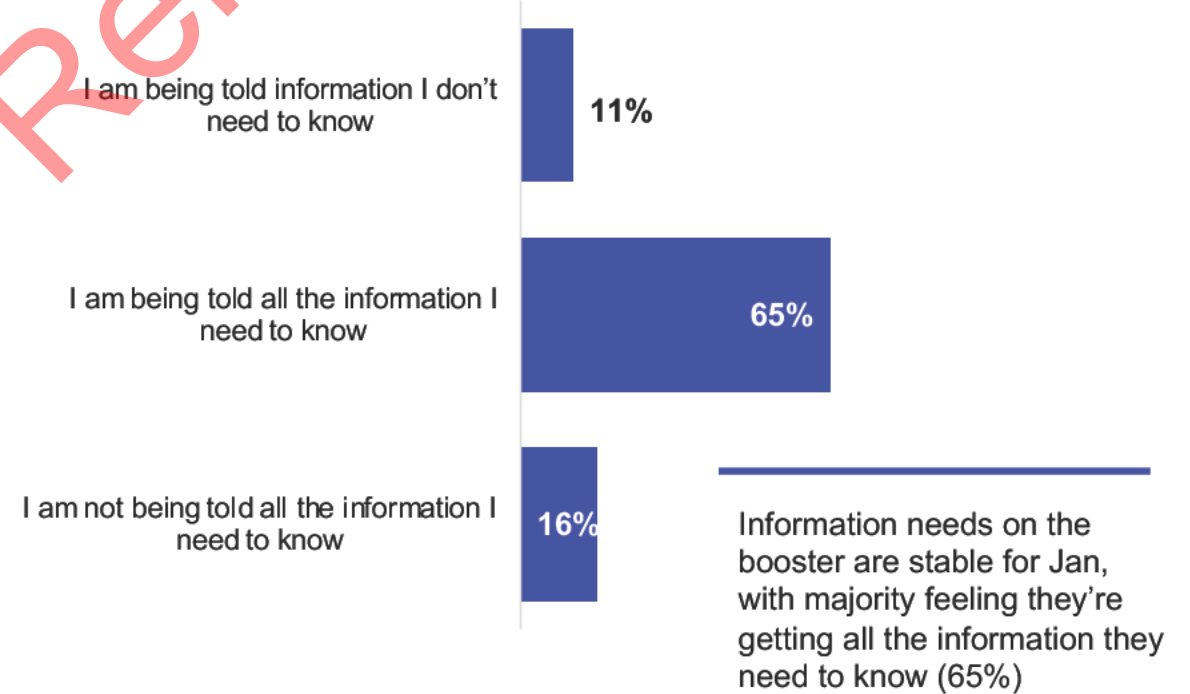
- Perception of the vaccine roll out is stable, with two thirds thinking they're being told all the information they need to know
- Any information gaps that remain are centred around evidence, side effects, their necessity & the future of vaccinations
- With the majority of New Zealanders now vaccinated, the group of unvaccinated are becoming harder to shift
- Side effects, efficacy and ingredients remain the top barriers for getting boosted

Perception of the vaccine roll out is stable from January

VACCINE ROLL OUT PROGRESS



BOOSTER SHOT INFORMATION QUALITY



Source: Behaviour & Sentiment Tracker (Mar 22)
 Q: How well do you think the COVID 19 vaccine roll out is going in New Zealand?
 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: Mar 22 total sample n=900

There are still information needs surrounding future vaccination, side effects, efficacy, and purpose of the booster

INFORMATION NEEDS – OF THOSE WHO WANT TO KNOW MORE INFORMATION

What will boosters be like in the future?

“The immunity expectancy; how long will it last before a booster is needed.”

”How long does it last, and will there be a forth booster shots?”

“Why we need to have one every 6 months and why we are basically not vaccinated if we don't take them”

Side effects / long term effects of the booster?

“Any long term side effects”

“All the side effects and chances for such”

” I have had an adverse reaction to the initial shots. I want to know that my health will not suffer or worsen.”

Efficacy of the booster? Does it actually work?

“I want some idea of efficacy”

”The efficacy of the booster shot.”

“The researched effectiveness”

Why the booster is needed?

“Why is it necessary, we were told we only needed two shots”

” Why we need them if they don't work.”

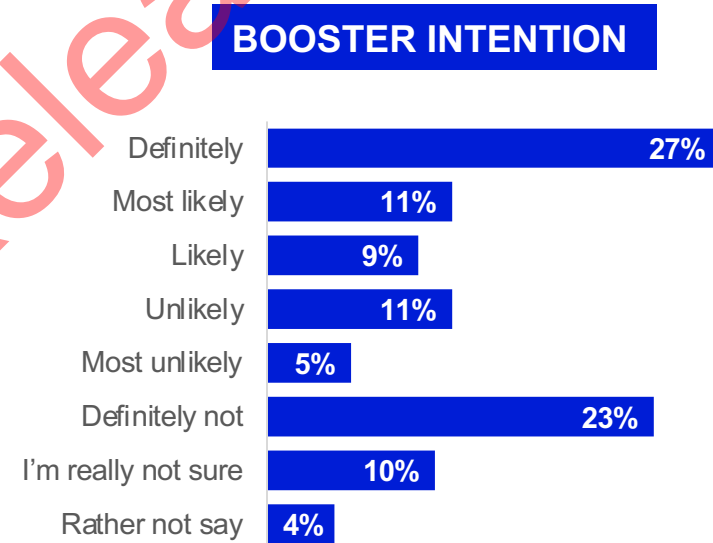
“Complications, is it really necessary to have this booster, what difference is it making”

Source: Behavior & Sentiment Tracker (Mar 22)
 Q: What other information would you want to know about COVID 19 booster shots?
 Base: At least one dose of the vaccine and want to know more information n=118

As more New Zealanders get the booster, the un-boostered group becomes more resistant

As at fieldwork from 11-18 March

VACCINATION STATUS	
NET: At least one dose	93%
Three doses or more, including my booster shot	67%
Two doses only	21%
One dose only	2%
Three doses or more, but not including my booster shot	4%
Unvaccinated	5%
Rather not say	1%

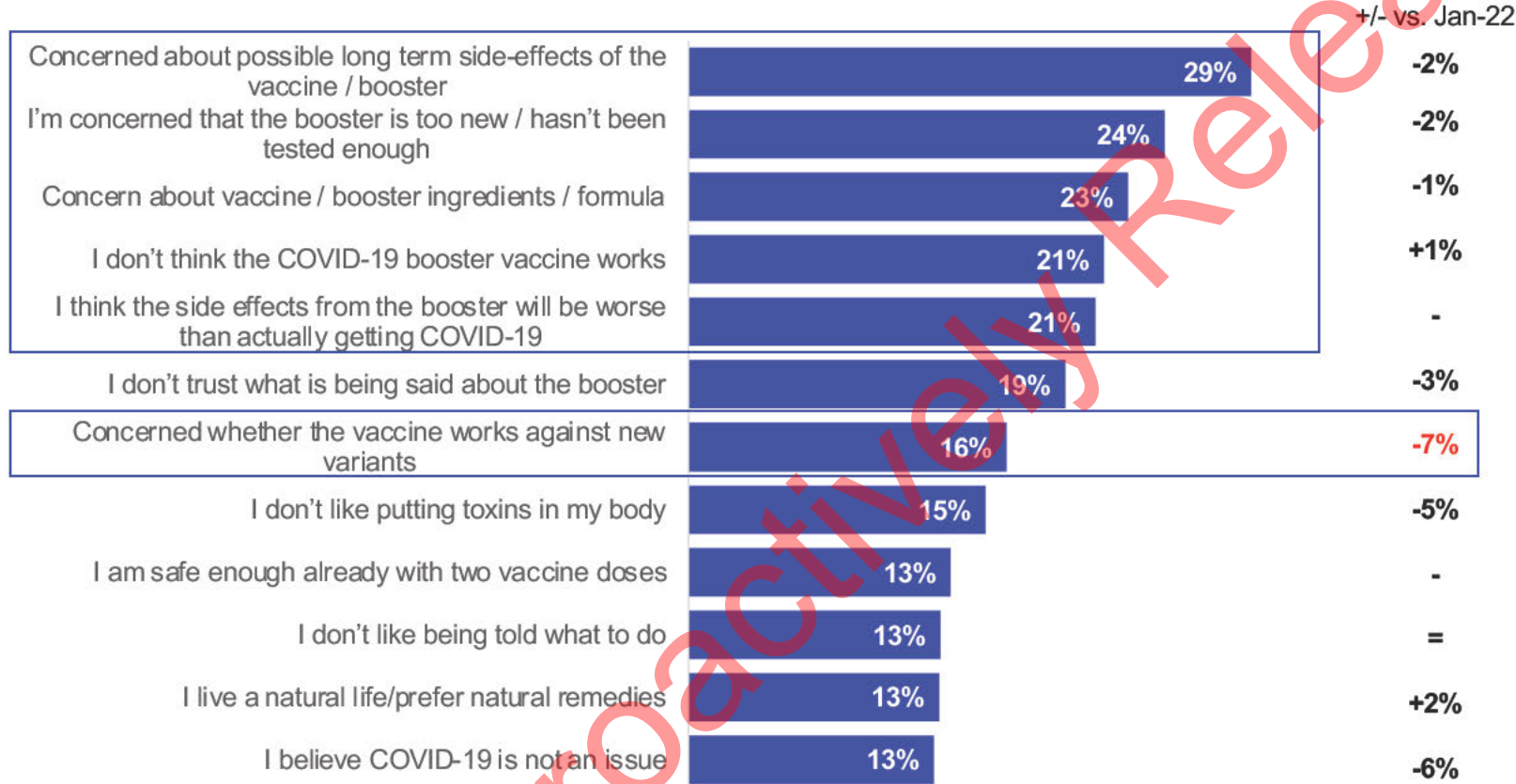


There are significant increases for 'unlikely', 'most unlikely', 'definitely not' when compared to January

Source: Behaviour & Sentiment Tracker (Mar 22)
 Q: Have you had a COVID 19 vaccination?
 Q: Do you intend to get the COVID 19 booster shot?
 Base: Mar 22 total sample n=900, haven't been boosted N=301

Side effects, efficacy and ingredients remain top concerns for getting the booster

BARRIERS TOWARDS GETTING THE BOOSTER SHOT



Barriers for the vaccine are largely stable - concern about the long-term side effects, concern the booster is too new, and concern about the ingredients of the vaccine

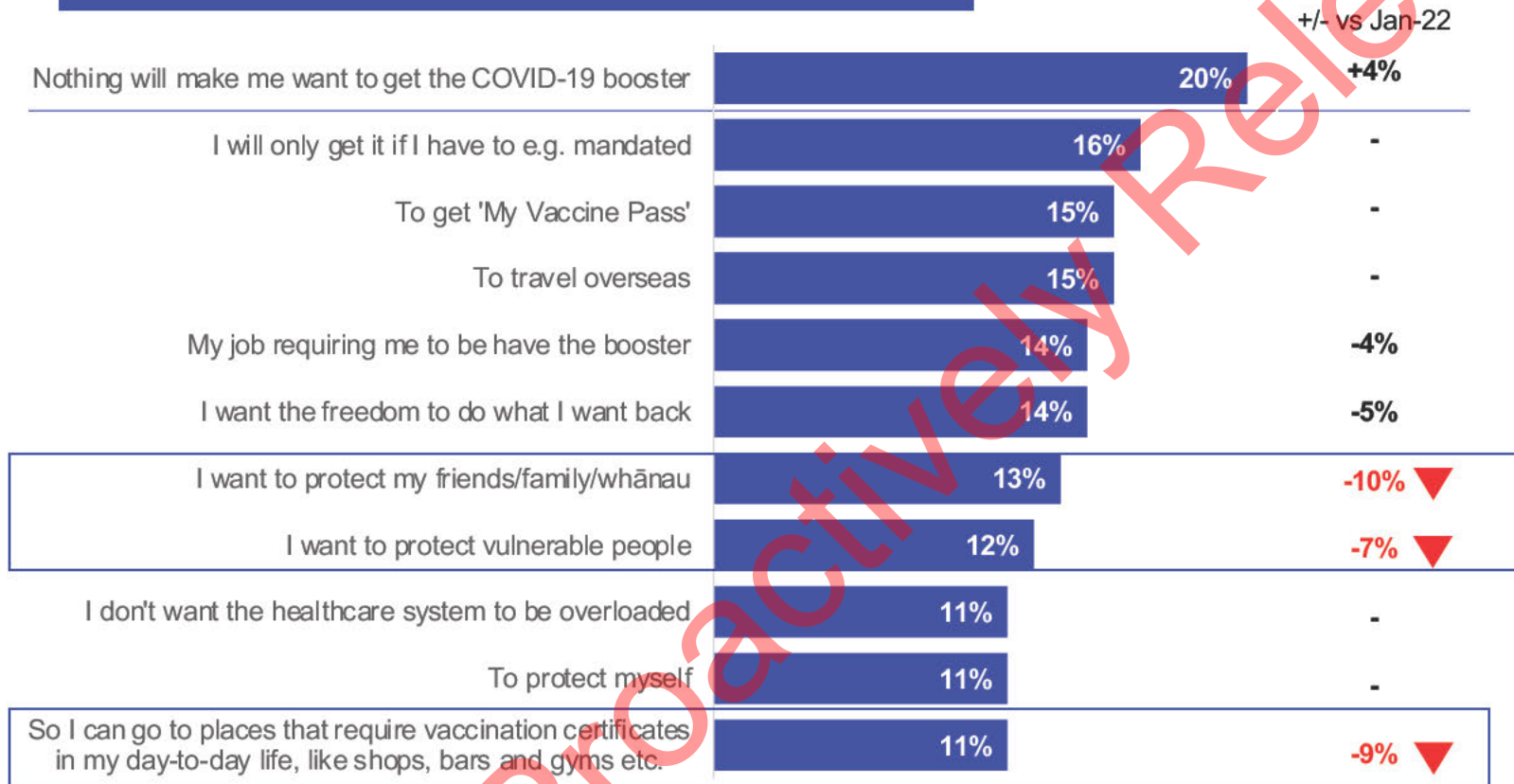
We see a significant decrease in those concerned whether the vaccine works against the new variants (16%, -7%) – perhaps overridden by the prevalent Omicron outbreak.

Source: Behavior & Sentiment Tracker (Jan 22, Mar 22)
 Q: What might stop you from getting the COVID-19 booster shot?
 Base: Mar 22 have not had booster and don't 'definitely' intend to get it n=220, Jan 22 have not had booster and don't 'definitely' intend to get it n=284

▲ ▼ Significantly higher / lower than previous wave

Collective motivators are becoming less of an influence in getting the booster shot

MOTIVATIONS FOR GETTING THE BOOSTER SHOT



Further evidence to show that the group of un-boosted New Zealanders are harder to move – 1 in 5 say that nothing will make them get the COVID-19 booster, and we are seeing declines in those saying they want freedoms back, want to protect their friends, family & vulnerable people – perhaps a signifier that the 'low hanging fruit' have already been converted

Source: Behaviour & Sentiment Tracker March 2022, January 2022

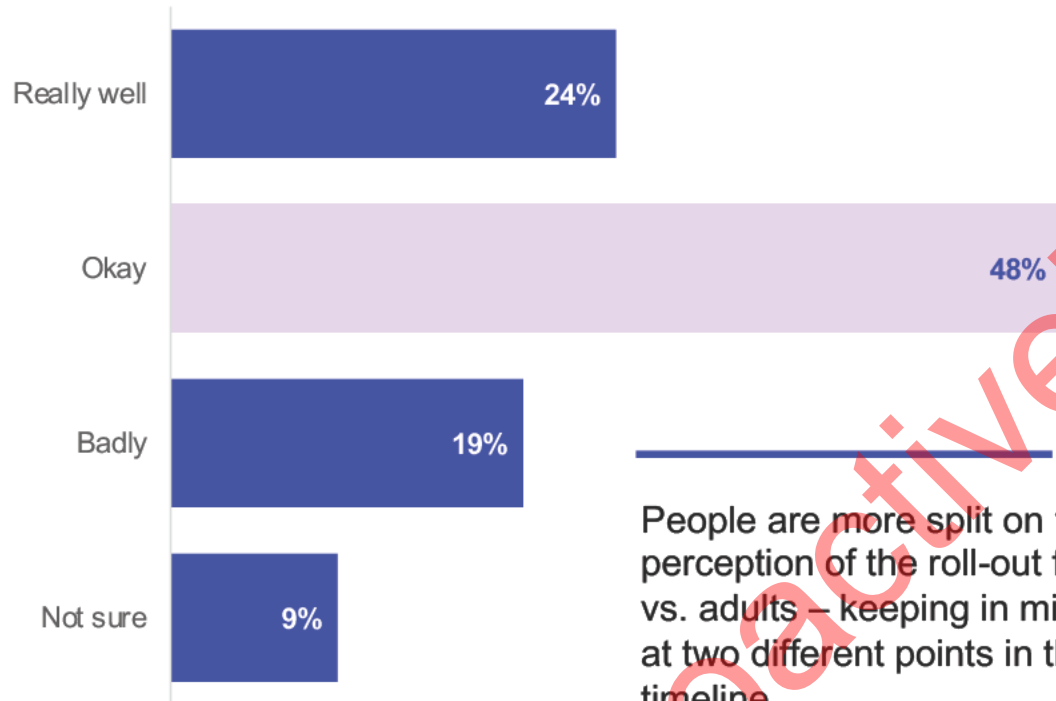
Q: Which of the following are most likely to make you want to get the COVID-19 booster?

Base: Mar 22 have not had booster and don't 'definitely' intend to get it n=220, Jan 22 have not had booster and don't 'definitely' intend to get it n=284

▲ ▼ Significantly higher / lower than previous wave

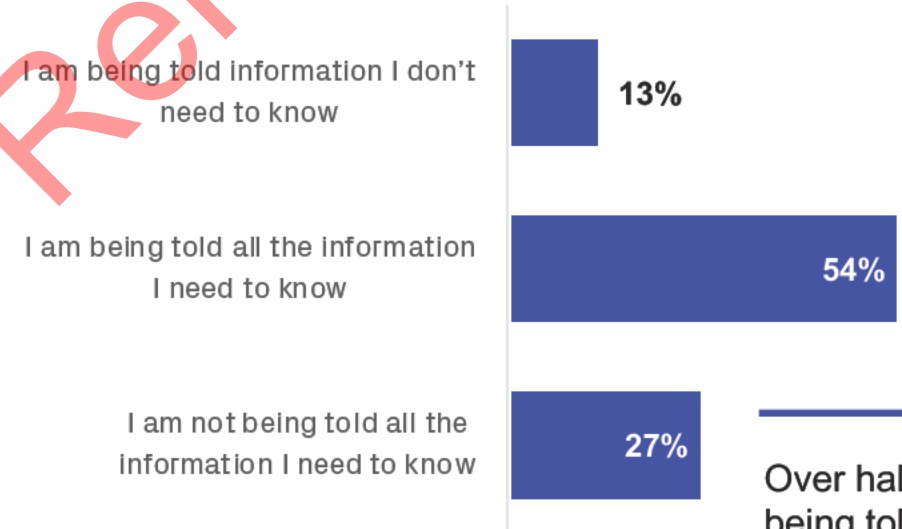
Only 1 in 4 parents feel like the COVID-19 vaccine roll-out for children is going really well, half say 'okay'

VACCINE ROLL OUT PROGRESS



People are more split on their perception of the roll-out for children vs. adults – keeping in mind we are at two different points in the roll-out timeline.

INFORMATION QUALITY

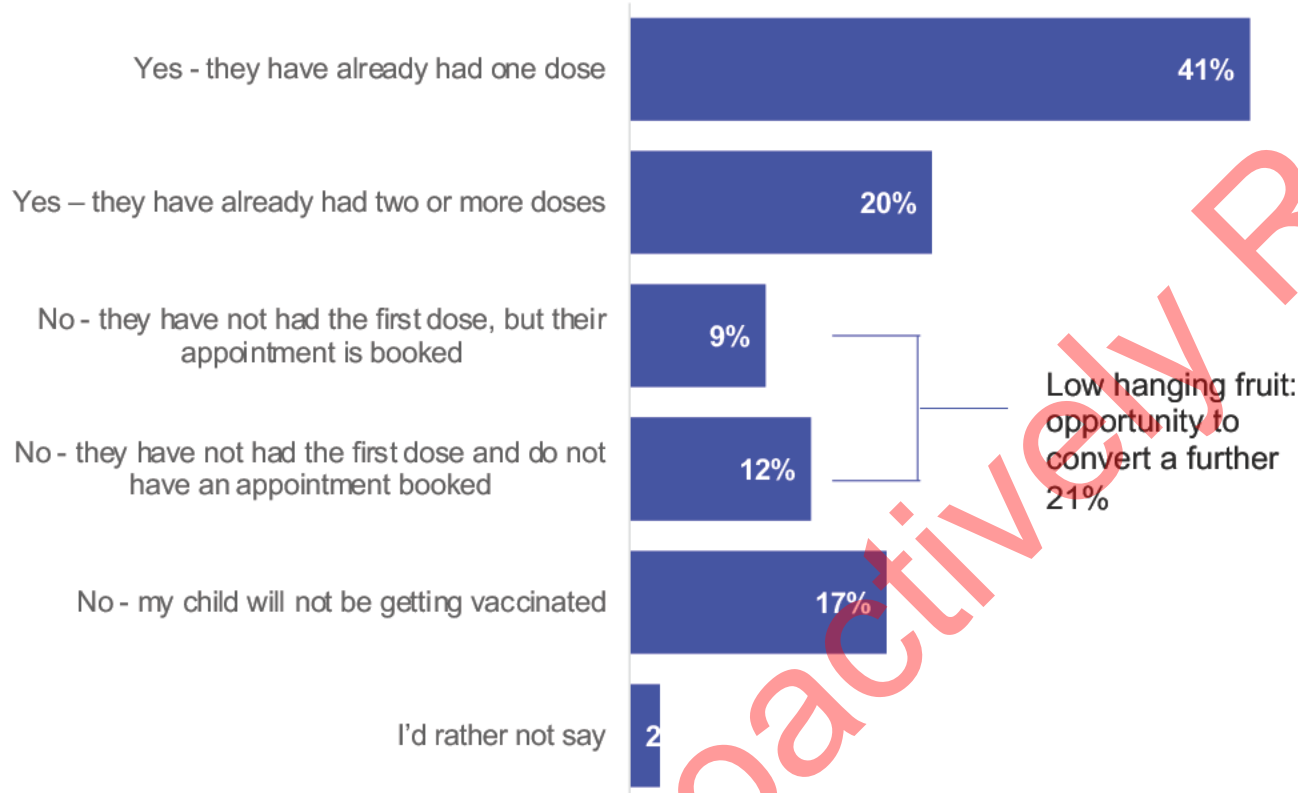


Over half feel they are being told all the information they need to know – but there is room for more information for over 1 in 4.

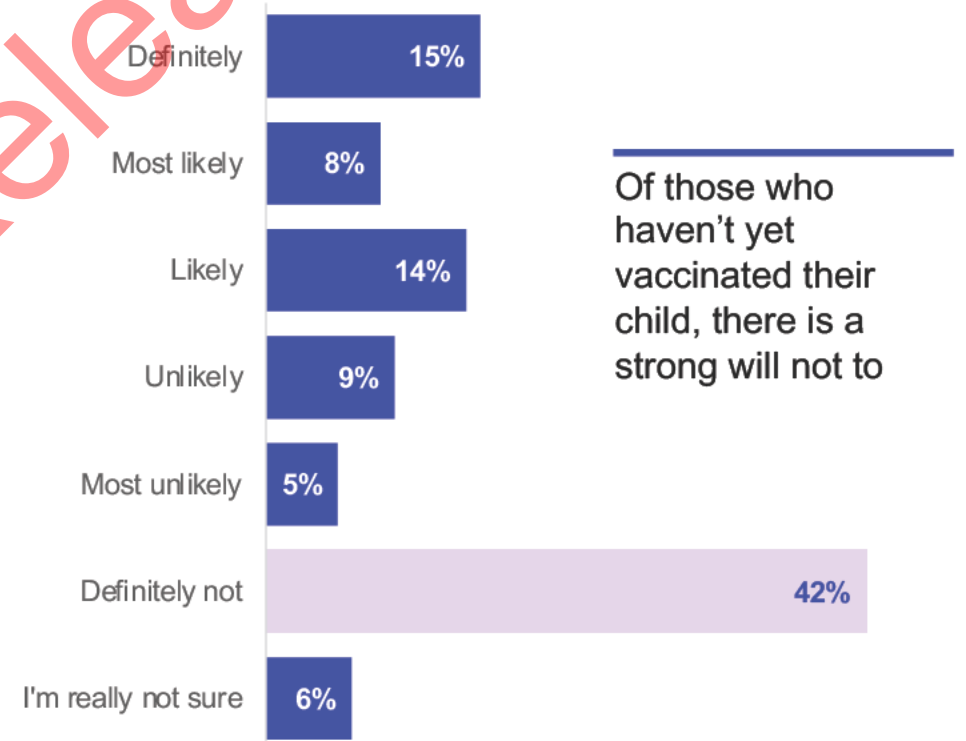
Source: Behaviour & Sentiment Tracker March 2022
Q: How well do you think the COVID-19 vaccine roll-out for children 5-11 years is going in New Zealand?
Base: Mar 22, parents n=172

6 in 10 parents had vaccinated their child for COVID-19 at the time of the research

VACCINATION STATUS



VACCINE INTENTION



Source: Behaviour & Sentiment Tracker March 2022
 Q: Has your 5 to 11 year old been vaccinated for COVID-19?
 Q: Do you intend for your 5 to 11 year old to get the COVID-19 vaccine?
 Base: Mar 22 parents N=172, parents with unvaccinated children N=70
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Appendix

Proactively Released

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SUMMARY

The sentiment in New Zealand is shifting in a positive direction, but there remains division.

As New Zealanders start to see a light at the end of the tunnel, overarching sentiment starts to shift. Of course, not everyone feels the same way: division remains, underpinned by levels of concern in catching Omicron.

Herein lies an opportunity for a targeted approach to give the right messages, to the right people, in the right ways.

Providing reassurance to any concerned New Zealanders will ensure they don't feel left behind, excluded or forgotten about as New Zealand learns to live with Omicron and eventually reopens to the world.

KEY TAKE AWAY

There is opportunity for targeted messages to New Zealanders with high levels of concern

How to deliver a message of reassurance?

1. Reach them through their top information sources:

- Online via trusted sources (COVID-19 website and MoH website)
- Advertising
- Community groups

2. Reach them through a lens that reflects their circumstance

- Safety of children
- Protection of the vulnerable
- Economic benefit of re-opening the border

Almost 8 in 10 New Zealanders have either personally had or know someone who has had COVID-19 – exposure is high

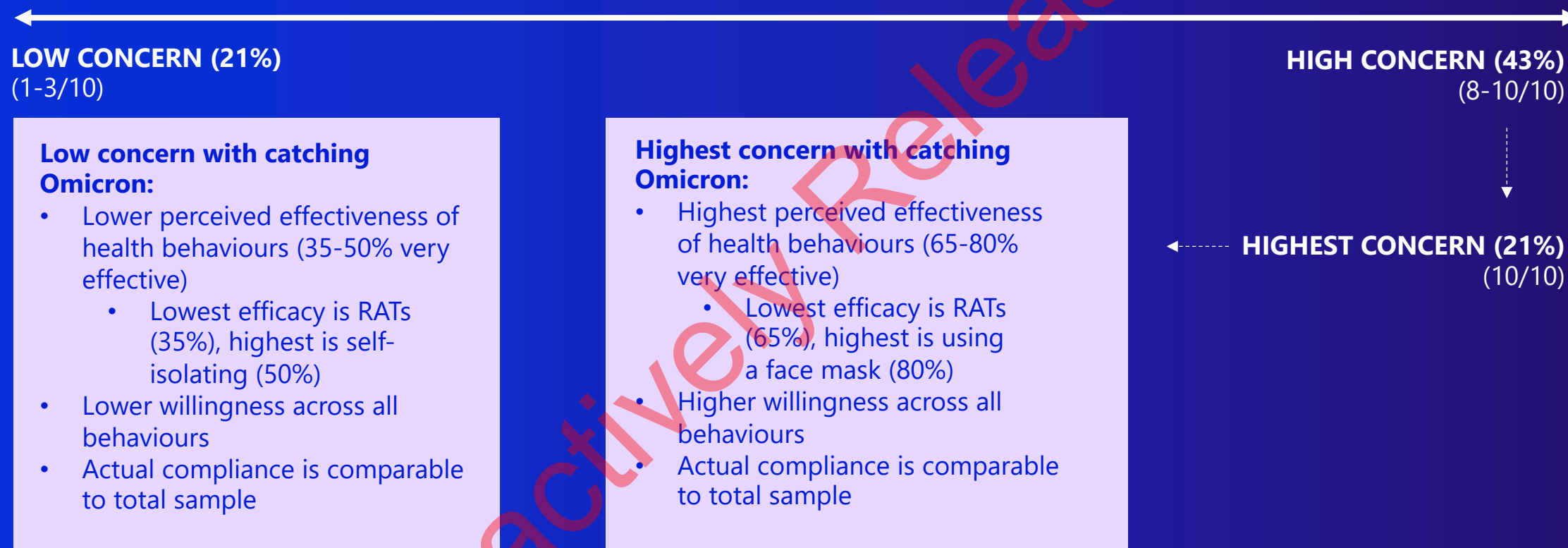


Source: Behaviour & Sentiment Tracker (Mar 22)

Q: We would like to understand if you or someone you know has ever had COVID-19.

Base: Mar 22 total sample n=900

Perceived effectiveness of health behaviours, willingness to comply and actual compliance varies by level of concern



Q: On the scale of 1-10, please select how concerned you are about the possibility of personally catching the Omicron variant of COVID-19.

Q: And from this same list of behaviours, how effective do you think each of these can be in slowing the spread of Omicron and keeping New Zealand safe?

Q: How willing are you to do the following?

Q: How often do you think other people in New Zealand do the following?

Mar 22 total sample N=900