

Sentiment & Behaviours Benchmark

DEPARTMENT OF THE PRIME MINISTER AND CABINET

DATE 16 JUNE 2021

TRA

Background

There is a need to understand ongoing sentiment and behaviours throughout 2021.

Unlike other countries, New Zealand has got on top of the virus and enjoys many relative freedoms. But these freedoms come at a price – many people are still making sacrifices, and there is a need to move in and out of Alert Levels when situations change.

The vaccine rollout is planned, and there will be a series of further announcements about what our 'new normal' might look like.

There is a sense of COVID-19 fatigue, and we know the situation will remain fluid throughout the year.

There is a need for immediate information, as well as regular checkins throughout the year 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.

To answer this, there are a number of specific insights and objectives we set out to achieve:

1. **Understand the wider context of peoples lives** – their hopes, expectations, priorities for the year
2. **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
3. **Understand motivations for compliance** – what will keep people engaged overall and with specific actions they have been asked to do
4. **Information and influencers** – understand the effectiveness of information and the key sources of influence
5. **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=1,853
- Margin of error at 95% confidence interval +/-2.28%

Key samples:

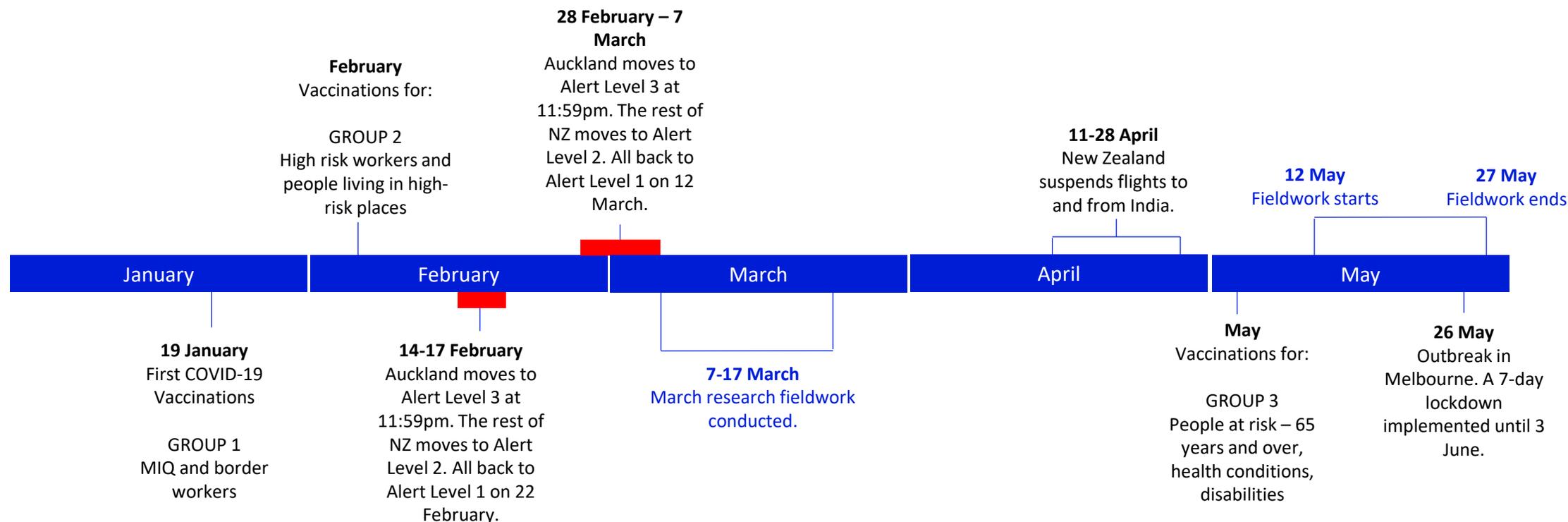
- Māori n=255
- Pasifika n=112

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 March 2021 research. This study consisted of n=976 Aucklanders, ages 15 years and over. Fieldwork occurred from March 7 to 17, after Auckland moved from Alert Level 3 to Alert Level 2. Comparisons are not made from the same sample base, so are indicative only.

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



NZ LOCKDOWN

Agenda

1

Understanding the mood of the nation

2

Information and behaviours

3

Deep dive into specific audience groups

How to read this document

We will firstly look at the immediate needs from a total population perspective in terms of the top holistic priorities on New Zealanders minds, how they believe COVID-19 might impact this, sentiment towards COVID-19 and Unite Against COVID-19, as well as the key information and messaging requirements to keep people engaged with COVID-19 communications.

Then we will look specifically at groups of interest that differ from the total market perspective in terms of how they are feeling and the needs they have of information and messaging.



**Understanding the
mood of the
nation**

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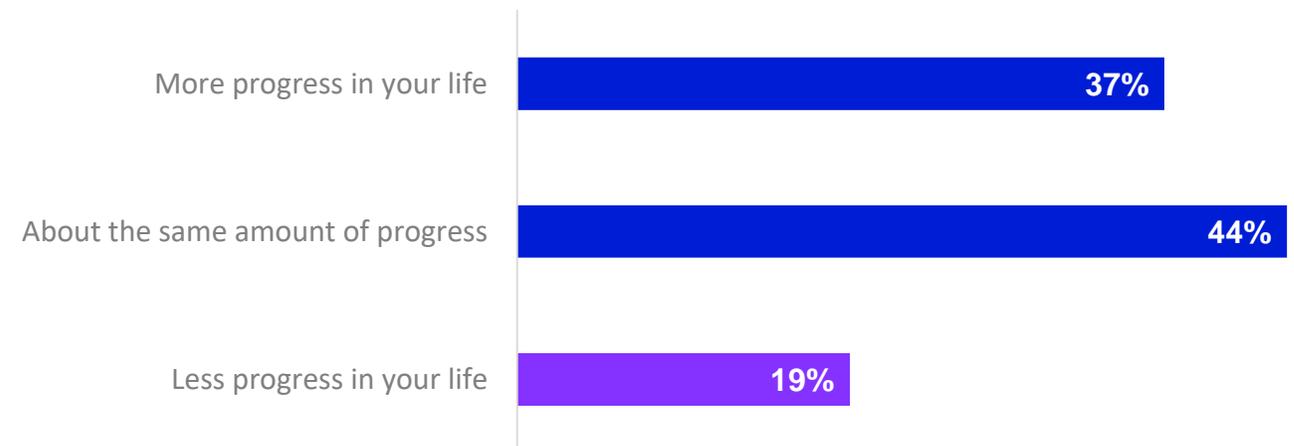
For most New Zealanders, COVID-19 has not interrupted their progress in life

Overall, people are feeling that they are making about the same, or even more, progress than 2 years ago.

The **19%** that feel they are making less progress are significantly more likely to be:

- 55-64y
- Under \$50k
- Self-employed
- Not in paid work

PERCEIVED LIFE PROGRESS COMPARED TO TWO YEARS AGO



In this context, our goals reflect normal life - spending time with friends and family, going on holidays, and financial progress

These overarching themes are also the parts of life which are most top of mind for New Zealanders – what they spend the most time thinking about (see appendix).

LOOKING FORWARD TO IN THE NEXT 12 MONTHS – TOP 10

Catching up with friends and family	40%
Family time	40%
Going on a New Zealand holiday	39%
Getting healthier	38%
Paying the bills / being more financially secure	35%
More income	34%
Seeing the situation improve for those overseas	27%
Going on an overseas holiday	23%
Taking time out	20%
Having family or friends visit from overseas	19%

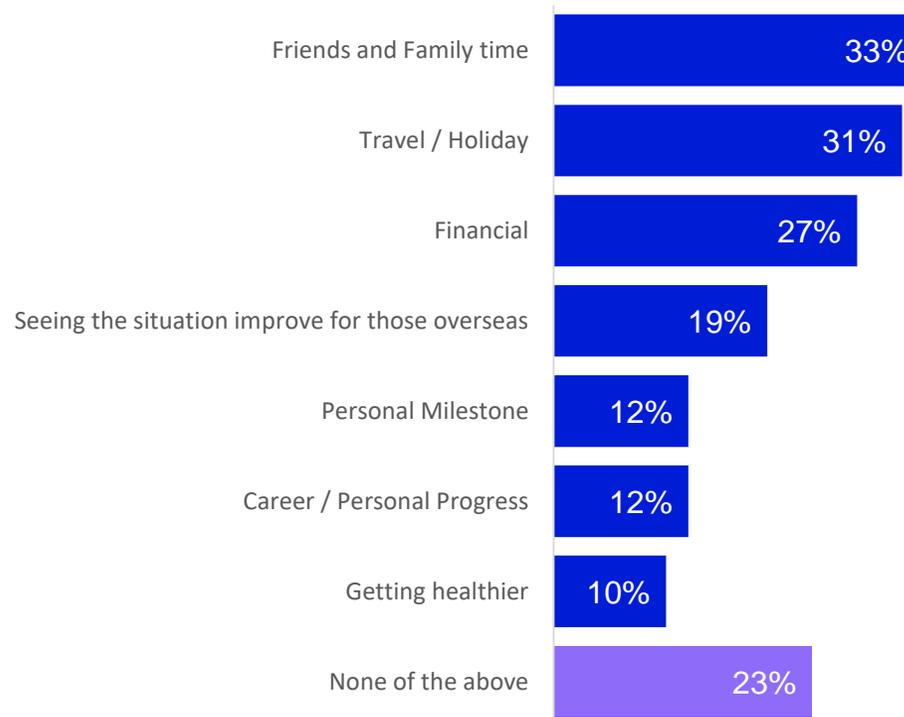
Q10 - What are the things you're most looking forward to in the next 12 months?
Base: Total sample n=1853

And in most cases, people don't feel COVID-19 will have much of an impact on what they want to achieve

We have clearly adapted to our changed circumstance

While there is some obvious worry that COVID-19 could affect time with friends and family (for example if there was another lockdown), and travel and financial positions, most of us feel that we will be able to continue achieving personal milestones, progressing in careers and getting healthier.

DO YOU HAVE ANY WORRIES THAT COVID-19 WILL IMPACT WHAT YOU'RE LOOKING FORWARD TO?



Those who don't think COVID-19 will impact what they're looking forward to are significantly more likely to be:

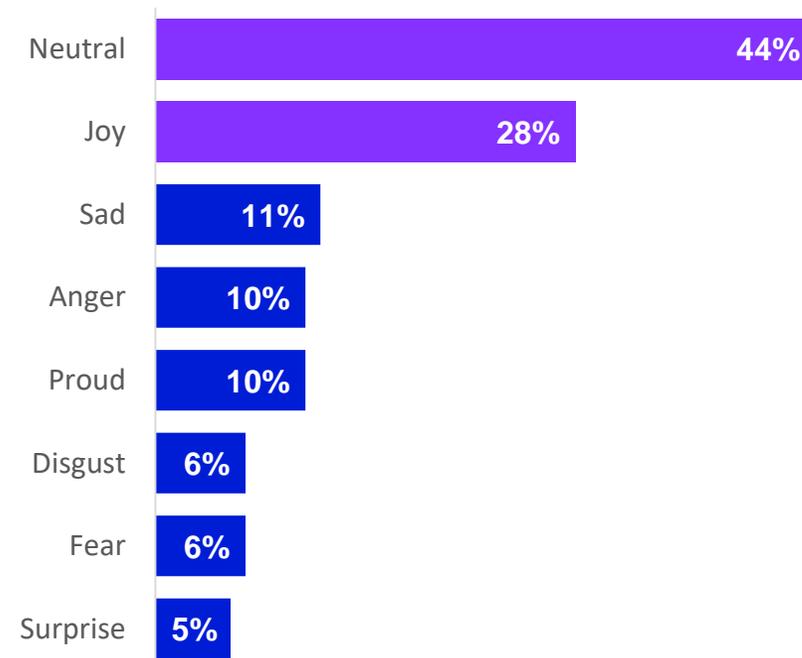
- 65 years and over
- New Zealand European

Q11 - Do you have any worries that any of these could be impacted by COVID-19?
 Base: Those who are looking forward to something in the next 12 months n=1809

As a result, our feelings about COVID-19 are quite passive, which can make it hard to motivate

The high ranking of neutrality indicates people are not strongly feeling anything – passivity can be hard to motivate as people are in a quite a neutral state and don't necessarily see a problem.

SENTIMENT TOWARDS THE COVID-19 SITUATION IN NZ



Q13 - What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?
Base: Total sample n=1853

As a country, people feel New Zealand is handling the COVID-19 situation well

Majority of New Zealanders feel we're heading in the right direction.

But there is a small group who do think we're going in the wrong direction.

Those who think we're going in the wrong direction are significantly more likely to be:

- Self employed
- Feel like their life is worse compared to before COVID-19
- Feel like they're not being told all the information they need to know – they are more likely to worry about the vaccine, the borders opening and others not following the rules

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

RIGHT DIRECTION	75%
WRONG DIRECTION	12%
NOT SURE	13%

Overall, people are optimistic and believe they will continue to make progress

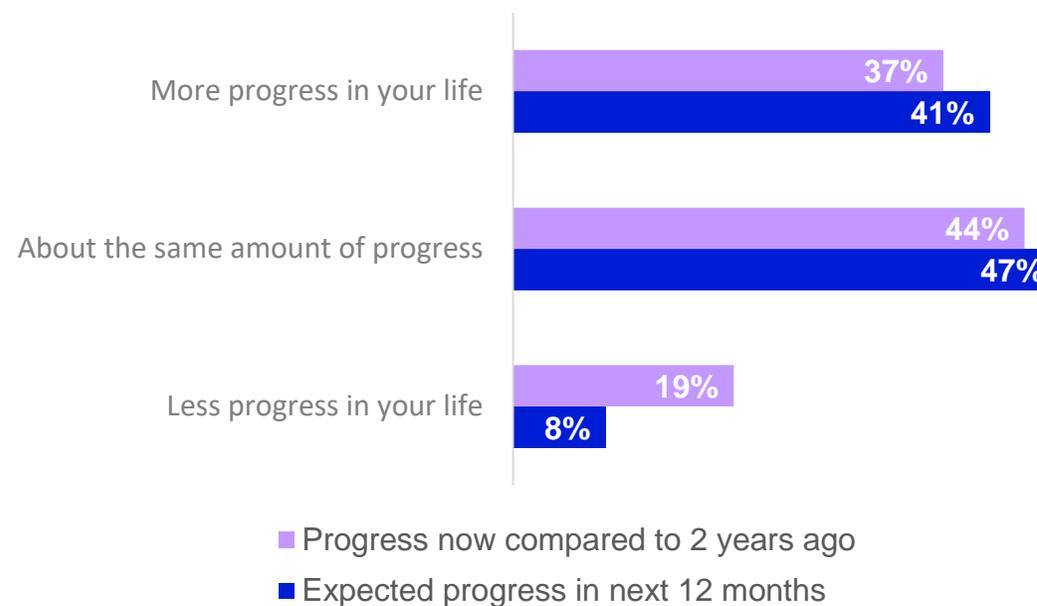
Overall people believe they will either continue the progress trajectory they are on or will make even more progress in the next year.

And in the future, people are looking forward to feeling even more balanced and content.

What are you looking forward to feeling in the next 12 months?

- Less stressed 46%
- Relaxed 45%
- Secure 43%
- Content 40%

LIFE PROGRESS – NOW AND IN THE FUTURE



Implication: COVID-19 isn't seen to be getting in the way of progress and how people are feeling about the future.

Q: And what are you looking forward to feeling in the next 12 months?
 Q: Do you think the next 12 months will see you make ...
 Base: Total sample n=1853

But there is a group who feel their life is worse than before COVID-19

Those who feel their life is at least a bit worse are significantly more likely to be:

- 55 years and over, particularly 55-64 years who are self-employed or part-time workers
- Self-employed workers
- Not in paid work but seeking work

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

HOW DIFFERENT DO YOU FEEL YOUR LIFE IS NOW, COMPARED TO BEFORE COVID-19?

AT LEAST A BIT WORSE	31%
NO DIFFERENCE	39%
AT LEAST A BIT BETTER	27%

Q: How different do you feel your life is now, compared to before COVID-19? (NET B2B At least a bit worse: A little bit worse + much worse, NET T2B At least a bit better: A little bit better + much better)

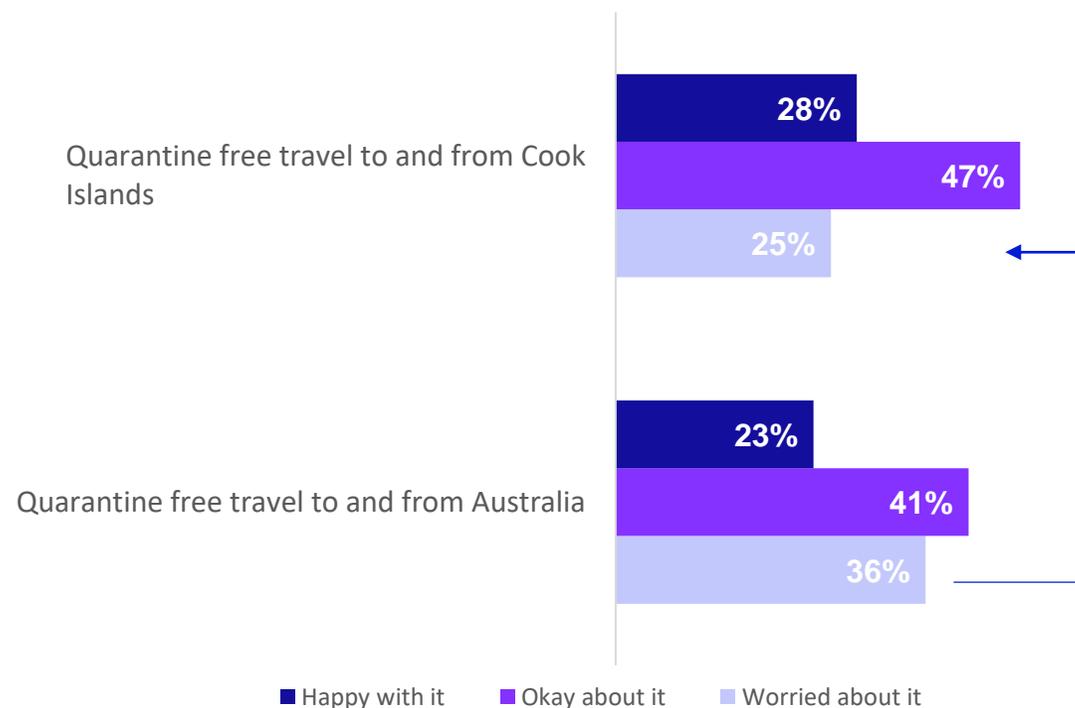
Base: Total sample n=1853

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While most are fine with opening up the bubble to limited people, there is still an underlying worry for a third

SENTIMENT TOWARDS QUARANTINE FREE TRAVEL

New Zealanders are more comfortable with the Cook Islands bubble than the Australian bubble.



Those who are worried about the travel bubble with Australia make up **80%** of those who are worried about the Cook Islands travel bubble.

Significantly more likely to be:

- 55-64 years old
- Female

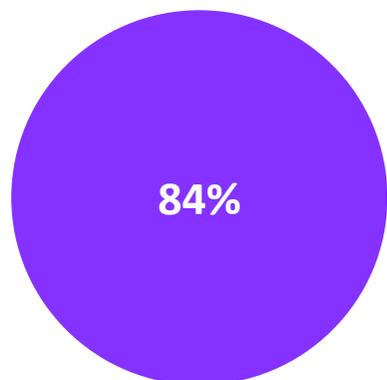
Q: How do you feel about the following ... <STATEMENT> (Okay about it: okay about it + haven't really thought about it)
Base: Total sample n=1853

And concern increases at the prospect of opening up the bubble further

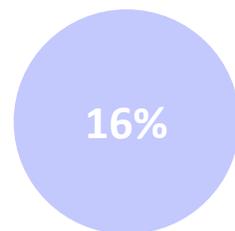
53% are worried about opening up quarantine free travel beyond Australia and the Cook Islands.

And while we are slightly more okay with workers coming to New Zealand to support, we are still worried about that risk.

SENTIMENT ON STOPPING TRAVEL FROM VERY HIGH RISK COUNTRIES



Happy/Okay about it



Worried about it

SENTIMENT TOWARDS COVID-19 BORDER RESTRICTIONS



■ Happy with it ■ Okay about it ■ Worried about it

Q: How do you feel about the following... <STATEMENT> (NET Happy/ Okay about it: Happy with it + Okay about it , Haven't really thought about it, NET: Okay about it: Okay about it + haven't really thought about it)
 Base: Total sample n=1853

IMPLICATION

New Zealanders have adapted to living in a restricted bubble for the most part and are feeling content

On the whole, COVID-19 is not stopping us from what we want to achieve, and we are feeling relatively optimistic about the future.

But we are worried about the bubble opening up further and the added risk that it could expose us to.

When people are feeling apathy and passivity about future COVID-19 risks, how do we keep them engaged?

So, in this bubble, how are people behaving and where are they getting information?

2

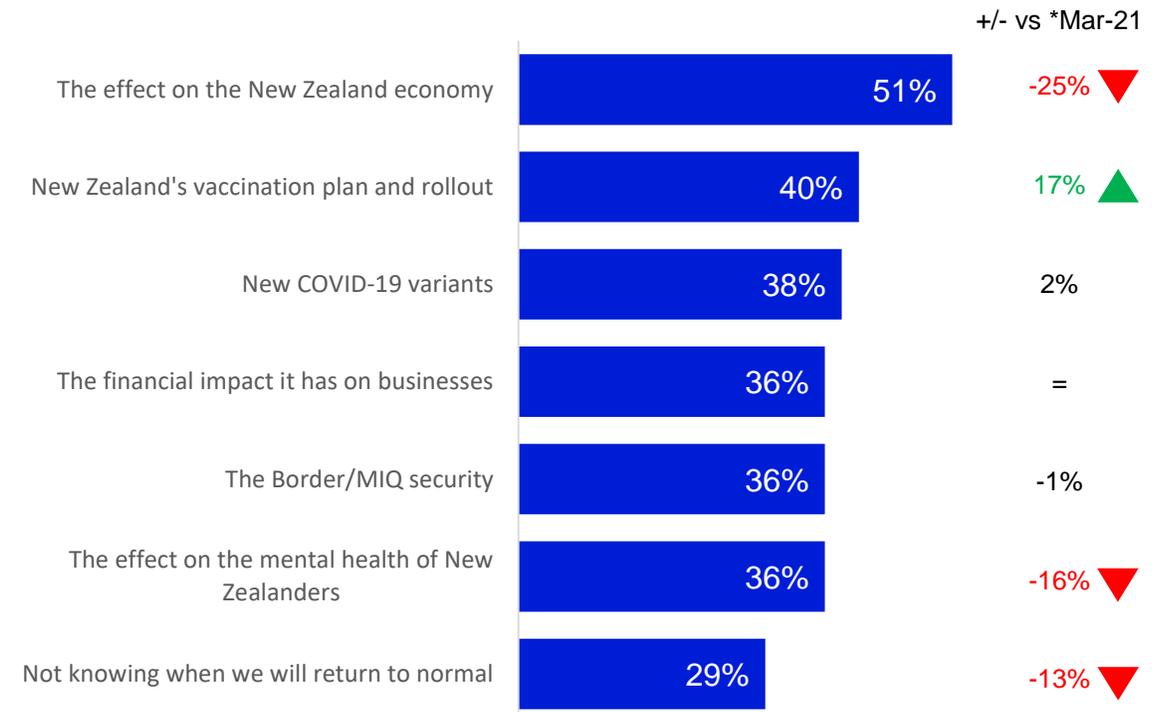
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While the economy is still top of mind, New Zealanders are spending more time thinking about the vaccination plan

The vaccination plan and rollout is starting to overshadow other COVID-19 considerations.

This may be a function of the focus on Unite Against COVID-19 vaccination communications cutting through.

IMPACTS OF COVID-19 ON NEW ZEALAND



Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
Base: Total sample n=1853



*March comparisons are indicative only. This data is taken from an Auckland only sample from fieldwork occurring when the region moved to Alert Level 2 on March 7 2021.

New Zealanders are realistic that COVID-19 health behaviours will be sticking around after the vaccination rollout

Only **9%** of New Zealanders believe that getting the country vaccinated will return life to how it was pre COVID-19.

They expect differences in life and to be maintaining COVID-19 health behaviours beyond the vaccine rollout.

FUTURE EXPECTATION OF COVID HEALTH BEHAVIOURS

I expect to continue to undertake health behaviours	36%
I expect there will be some differences in day to day life compared to pre-COVID-19	47%
I expect everything to be back to the way it was pre COVID-19	9%

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: Total sample n=1853

Overall, New Zealanders are willing to do their part to prevent the spread of COVID-19

COMPLIANCE – KEY COVID-19 HEALTH BEHAVIOURS

	Very willing happy to do my part + I do it all the time ...
Staying home if you're feeling sick or unwell, including staying off work	75%
Coughing or sneezing into your elbow	84%
Washing your hands with soap for at least 20s / sanitising	85%
Contacting Healthline or your doctor if unwell with COVID-19 symptoms	80%
Using a mask on public transport	79%
Using the NZ COVID Tracer app to scan in	67%
Turning on Bluetooth in the NZ COVID Tracer app	62%

COMPLIANCE – KEY ALERT LEVEL 3 BEHAVIOURS

	Very willing happy to do my part + I do it all the time ...
Not attending large gatherings and events	88%
Staying home in their bubble (other than for essential personal movement)	89%
Working from home	80%
Restricting travel to other regions of New Zealand	87%
Not visiting hospitality and retail outlets	86%

Using the NZ COVID Tracer app and turning Bluetooth on are the lowest scoring for compliance and willingness.

Q: How willing are you to do the following? <STATEMENT> NET: T2B Do it all the time (very willing, happy to comply, I do it all the time but I'm not that happy about it)

Q: If we shifted to Alert Level 3, how willing would you be to do the following? <STATEMENT> NET: T2B Do it all the time (very willing, happy to comply, I do it all the time but I'm not that happy about it)

Q March: Which of the following were you doing during the most recent Alert Level 3?

Base: Total sample n=1853

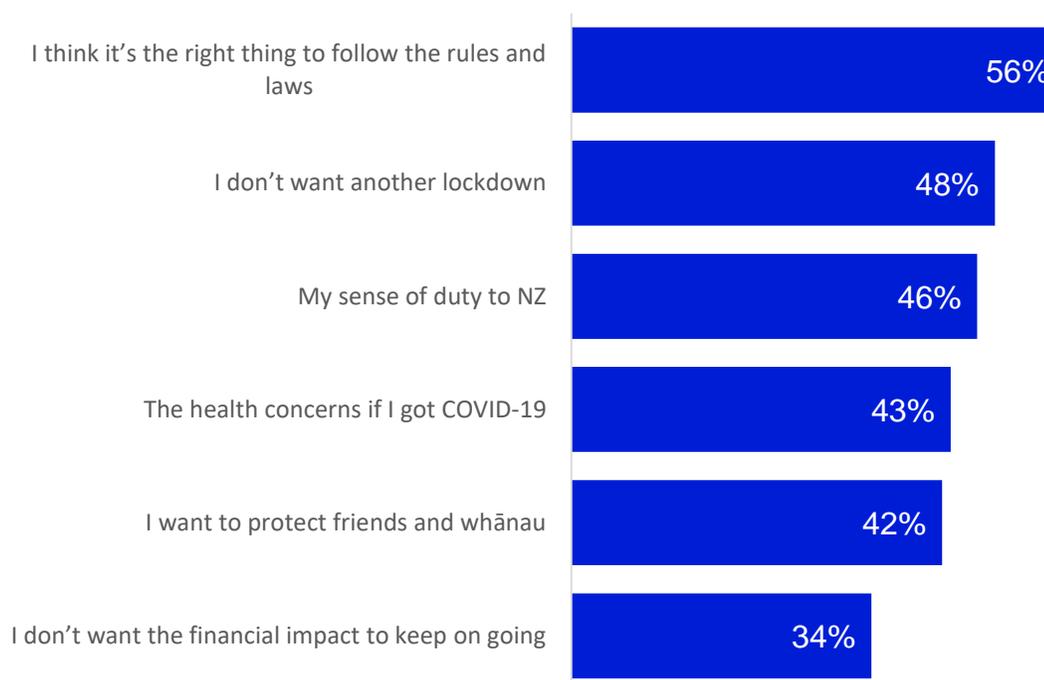
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This is because people are motivated to follow the rules and to avoid another lockdown

Compliance to the rules is the biggest motivator, followed by avoiding another lockdown, and a sense of duty.

Protecting friends and whānau is a key motivator for Māori and Pasifika (more on this later).

COVID-19 GUIDELINE COMPLIANCE MOTIVATORS



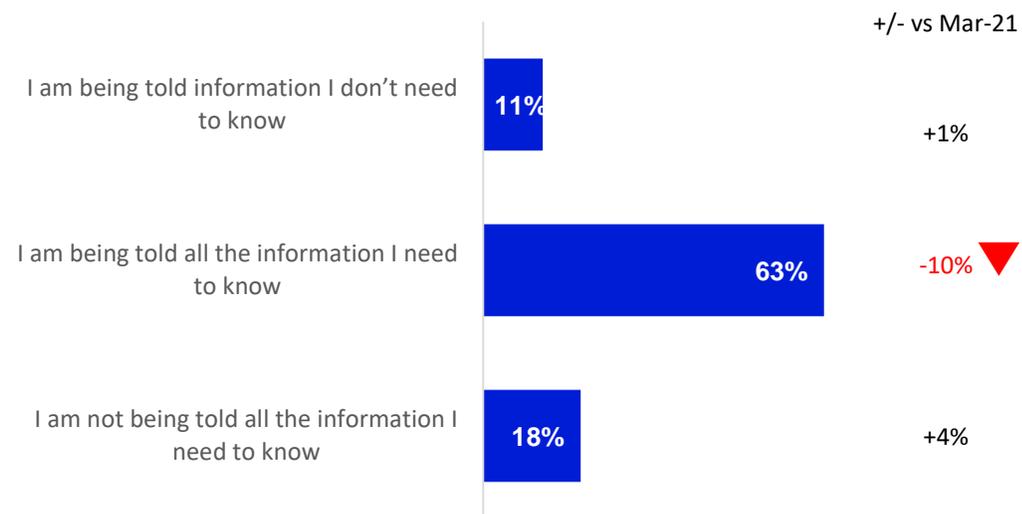
Q24: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?

Base: Total sample n=1853

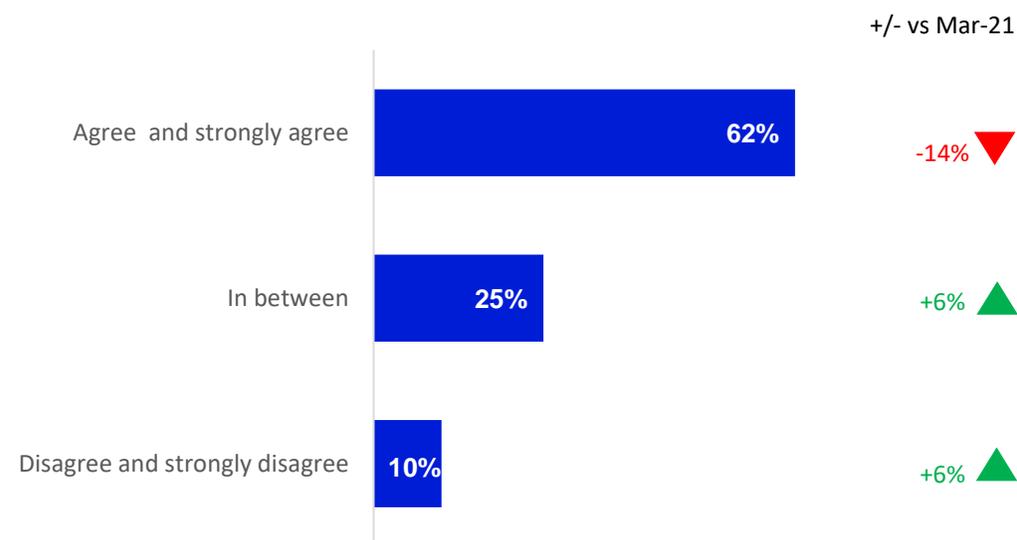
We mostly feel like we are getting the right amount of information, and that it is of quality

But this positive assessment has weakened since March 2021.

THE QUALITY OF INFORMATION ABOUT COVID-19



ACCESS TO INFORMATION ABOUT COVID-19



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: Total sample n=1853



*March comparisons are indicative only. This data is taken from an Auckland only sample from fieldwork occurring when the region moved to Alert Level 2 on March 7 2021.

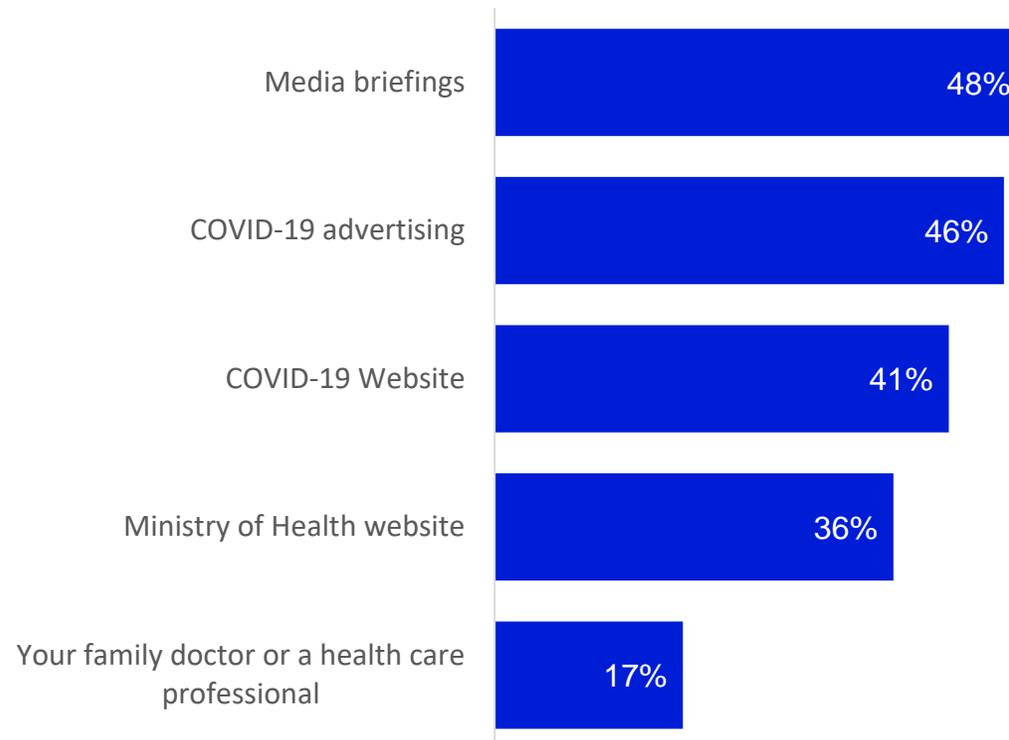
A vast majority of New Zealanders are getting some information from Government sources or healthcare professionals

83% of New Zealanders are getting at least some of their information from Government sources or healthcare professionals

Those who aren't getting any information from Government sources or healthcare professionals (17%) are more likely to be:

- Pasifika (27%)
- 16-17 years old (42%)

GOVERNMENT SOURCES & HEALTHCARE PROFESSIONALS (83%)



Q19 : 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, etc.?

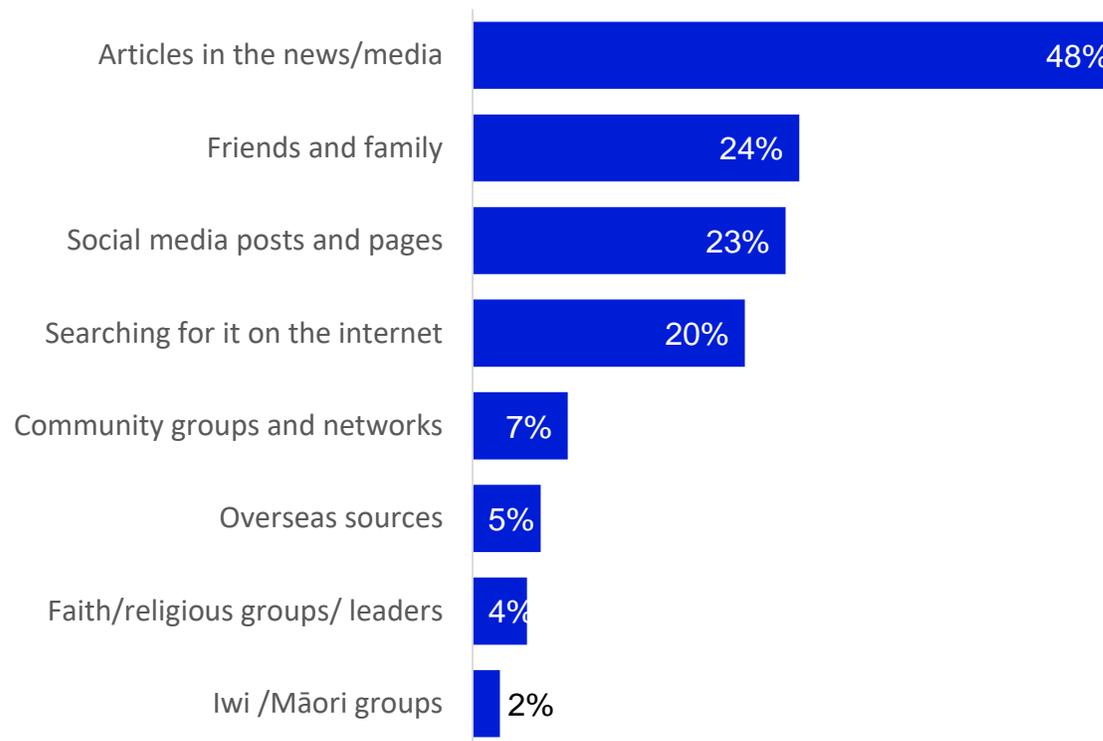
Base: Total sample n=1853

But non-Government sources are also very prevalent

The top non-Government sources include news/media articles, friends and family, internet/social pages.

Pasifika skew to using more non-Government sources sources, particularly social media (34%).

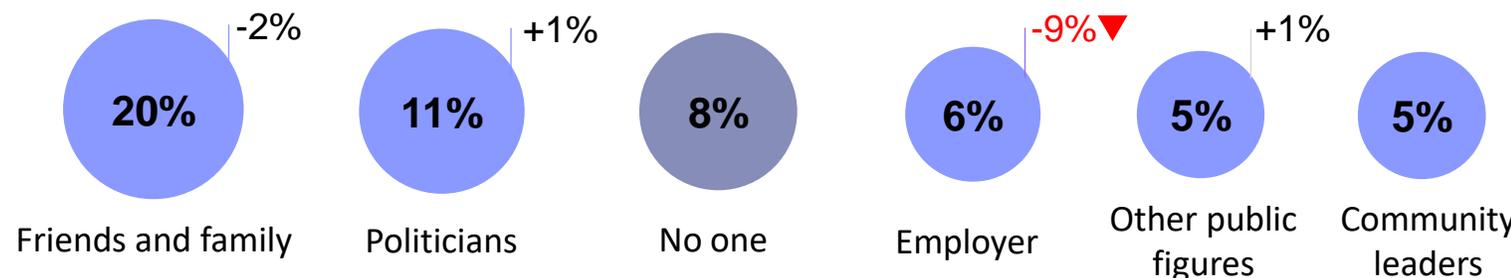
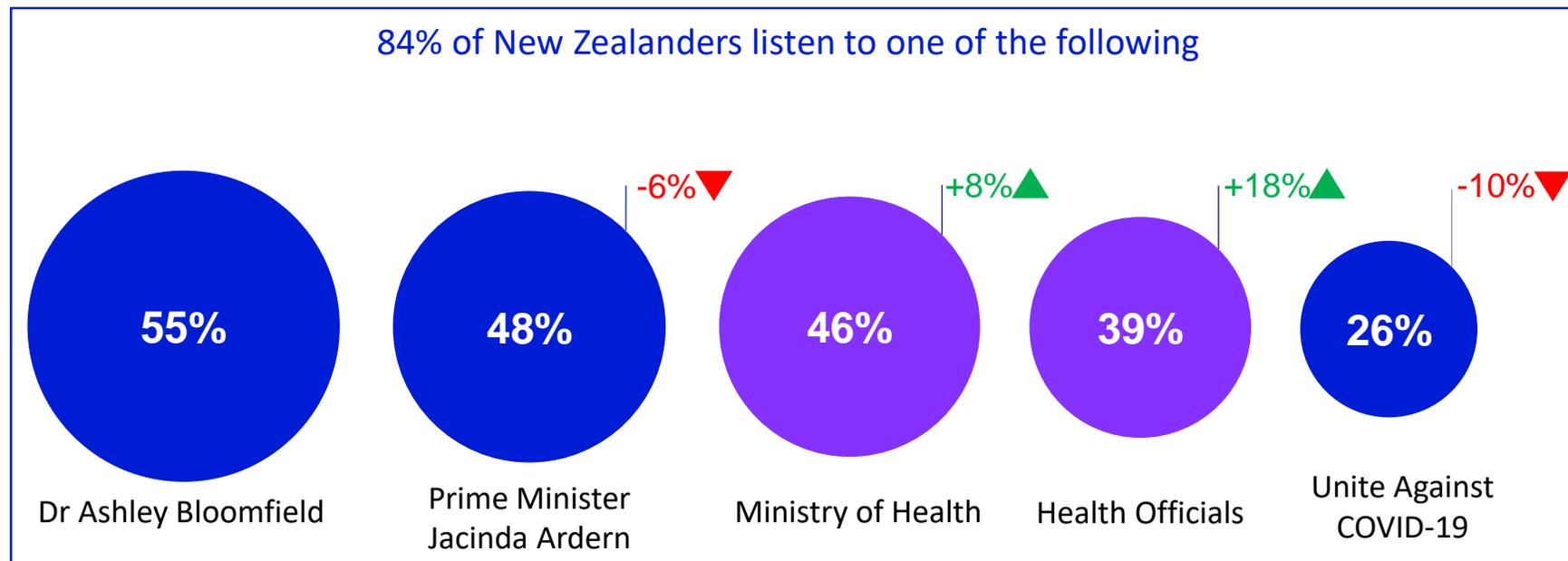
NON-GOVERNMENT INFORMATION SOURCES (73%)



When it comes to influencers the Ministry of Health is increasing in their reach

84% of New Zealanders listen to one of the following

The increase in reach for the Ministry of Health and Health Officials is likely in response to the focus on the vaccination roll-out.



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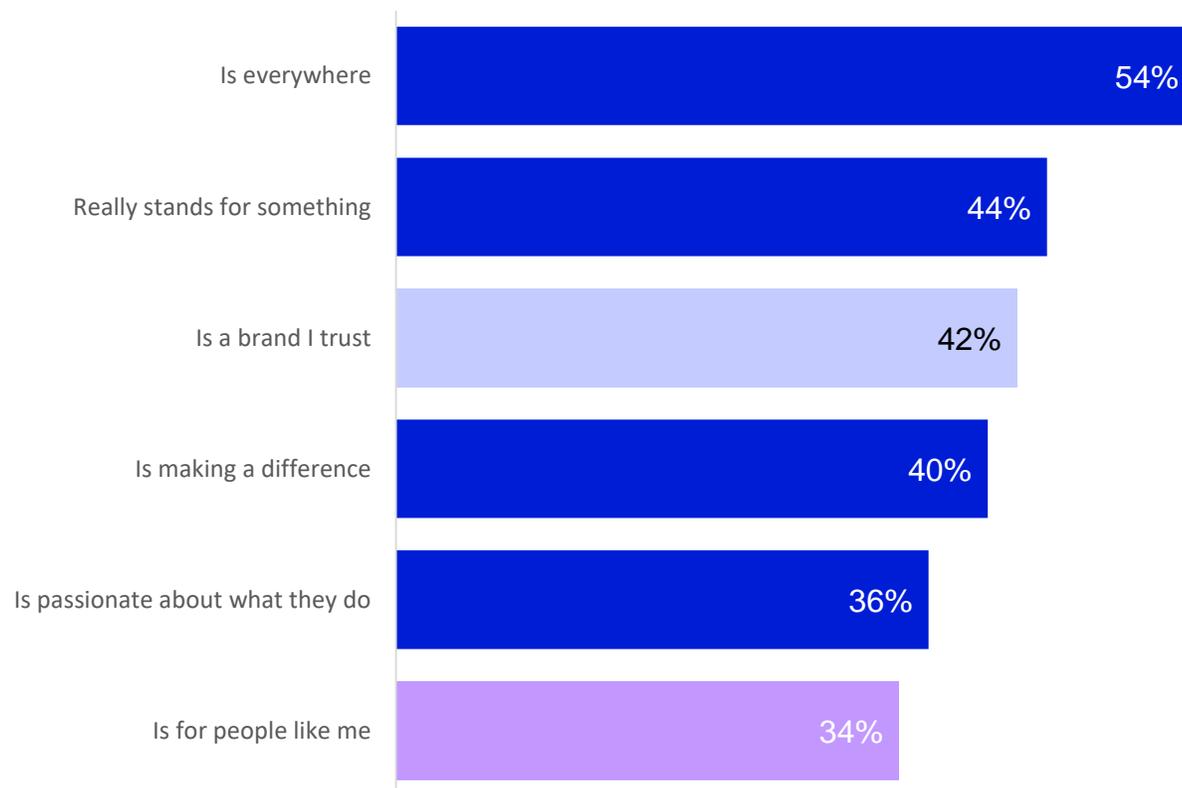
Q21: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?

Base: Total sample n=1853



The Unite Against COVID-19 brand performs well, but lacks relevance for some, and is lower in overall trust

ASSOCIATIONS WITH THE 'UNITE AGAINST COVID-19' BRAND



Trust is brought down by:

- Māori

Trust is significantly higher for:

- 45-54 years
- \$140k to \$160k household income
- People who feel like they're being told all the information they need to know

Relevance is brought down by:

- Under 35s
- Māori
- Students in paid work
- \$100k to \$120k household income

This group is used to targeted messaging

Q31: Do you feel that Unite Against COVID-19 ... <STATEMENT>? (Is passionate about what they do, really stands for something, is for people like me, is everywhere, is a brand I trust, is making a difference, none of the above)

Base: Total sample n=1853

IMPLICATION

The vaccine is becoming much more prominent

While the economy is still a top concern, the vaccine is starting to take share of mind. People are realistic that the vaccine is not going to solve everything.

People are still willing to do what they need to do for New Zealand, but we need to talk about it in a more emotional, connected, and everyday way (remember New Zealanders for the most part are feeling content).



**Understanding
specific audience
groups**

TRA

There are some specific audiences that are worth having specific initiatives in place for

**Note: there is diversity within these groups. Groups are defined by participants self-selection.*



Māori

Despite feeling positive about their own lives, and that NZ is handling COVID-19 well, they are more likely to feel fear towards the COVID-19 situation in NZ.

This stems from a worry that COVID-19 can impact their goals, particularly financial betterment.



Pasifika

Pasifika are feeling relatively positive about their own lives, and that NZ is handling COVID-19 well.

But they have lower levels of compliance either because they just won't comply, or they aren't aware of the rules.

They are motivated to protect their friends and family and want to travel overseas to see them - this is an opportunity for motivating compliance with this group.



Indian

Indians feel positive about their life, and feel New Zealand is handling COVID-19 well. They are compliant with health and Alert Level behaviours.

But they are more motivated for the borders to re-open further, unlike the rest of the population. The job to do here is more about proactively managing expectations so that this group does not become disengaged.



Under 35
males

Under 35 males feel positive about their life, and feel New Zealand is handling COVID-19 well.

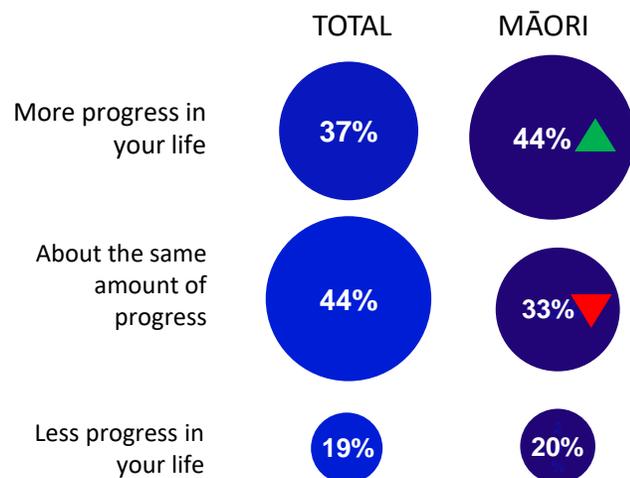
But they are less engaged and motivated towards COVID-19. This flows through to less compliant behaviours in comparison to the total population.

We need to make communications and messaging feel more relevant to this group to increase their engagement and overall compliance.

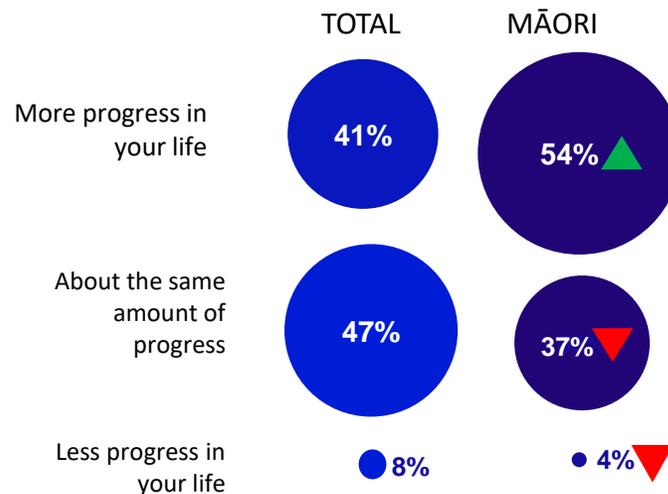


Māori are even more optimistic than the total sample when it comes to their life progress

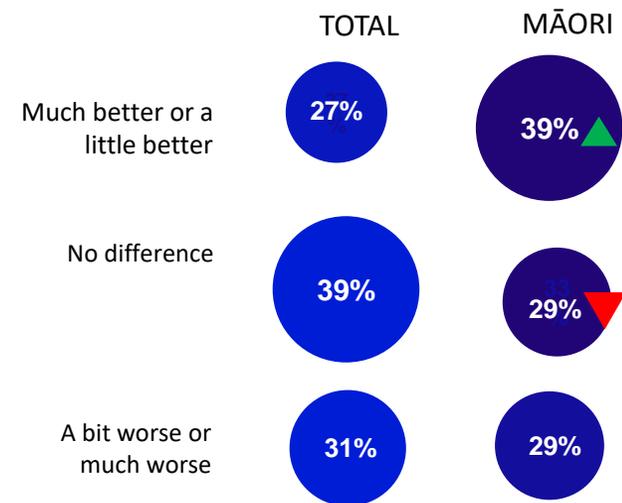
PERCEIVED PROGRESS – COMPARED TO 2 YEARS AGO



PERCEIVED PROGRESS – IN THE NEXT 12 MONTHS



PERCEIVED CHANGE COMPARED TO BEFORE COVID-19



Q7: Compared to two years ago, do you feel you're making ...
 Q8: Do you think the next 12 months will see you make ...
 Q16: How different do you feel your life is now, compared to before COVID-19?
 Base: Total sample n=1853, Māori: n=255.

And Māori also feel New Zealand is handling COVID-19 well – that we're heading in the right direction



Māori

HOW DO YOU FEEL THE COUNTRY IS HANDLING COVID-19?

Māori are in line with the total population in feeling that as a country our handling of COVID-19 is in the right direction.

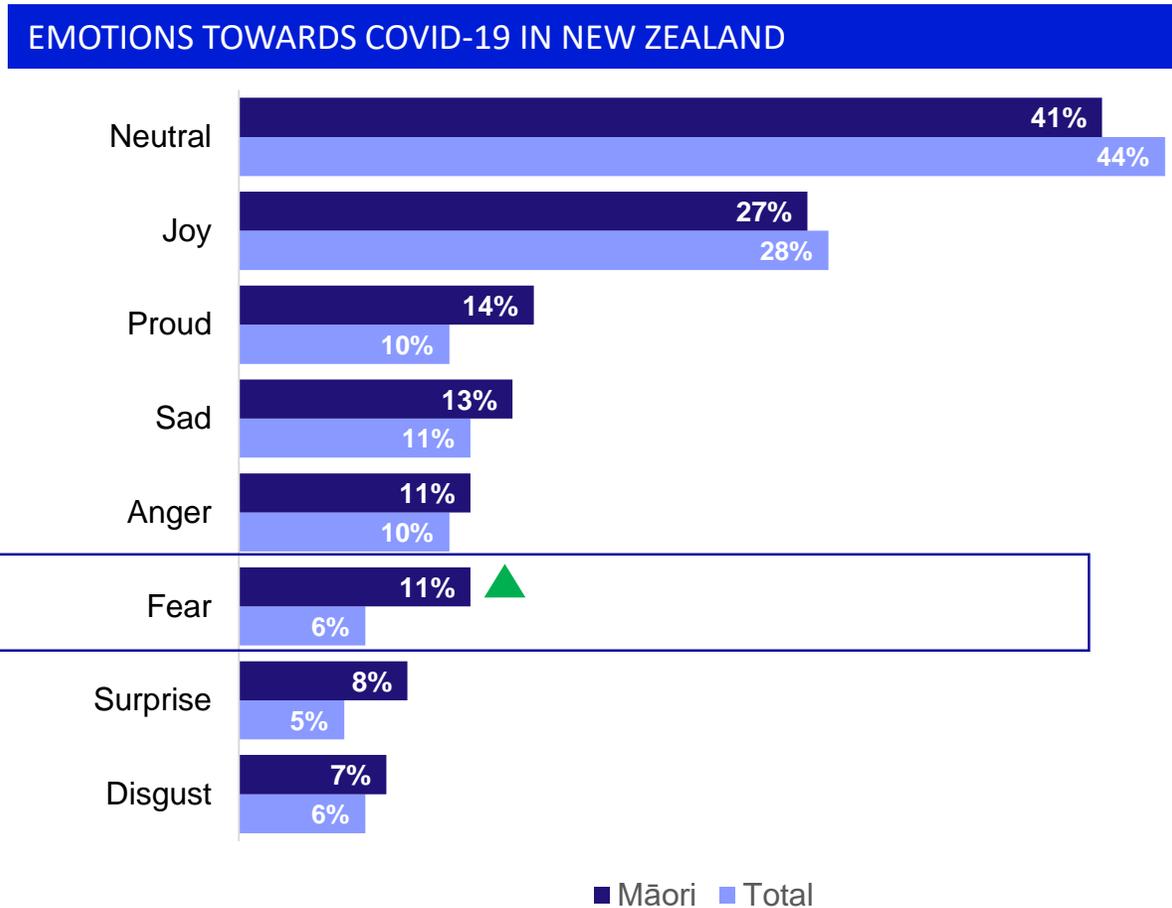
	TOTAL	MĀORI
RIGHT DIRECTION	75%	79%
WRONG DIRECTION	12%	10%
NOT SURE	13%	11%

Q15 - How do you feel the country is going with handling the impact of and response to COVID-19?
Base: Total sample n=1853, Māori: n=255.



Despite feeling like we're heading in the right direction, they are more likely to feel fear surrounding the COVID-19 situation

Māori are significantly higher on the **fear** emotion in terms of how they are feeling towards COVID-19.



Q: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?
 Base: Total sample n=1853, Māori: n=255.





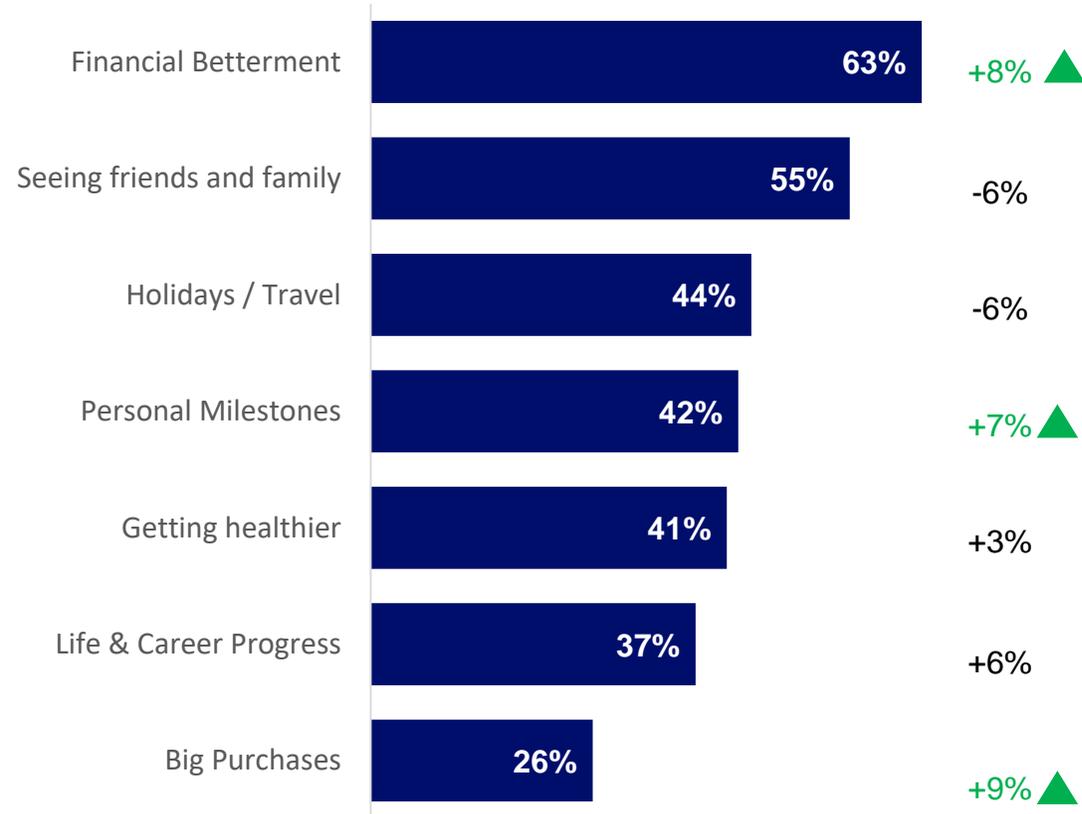
This may stem from concerns that what they're looking forward to could be impacted by COVID-19

Financial betterment is the top goal for Māori, overtaking seeing friends and family, which is the top for total sample.

This is also the area they're most concerned could be impacted by COVID-19 in the future (32% are worried that COVID-19 will impact their ability to achieve this goal).

MOST LOOKING FORWARD TO IN NEXT 12 MONTHS

v total sample



Q10: What are the things you're most looking forward to in the next 12 months?
 Q11: Do you have any worries that any of these could be impacted by COVID-19?
 Base: Total sample n=1853, Māori: n=255.

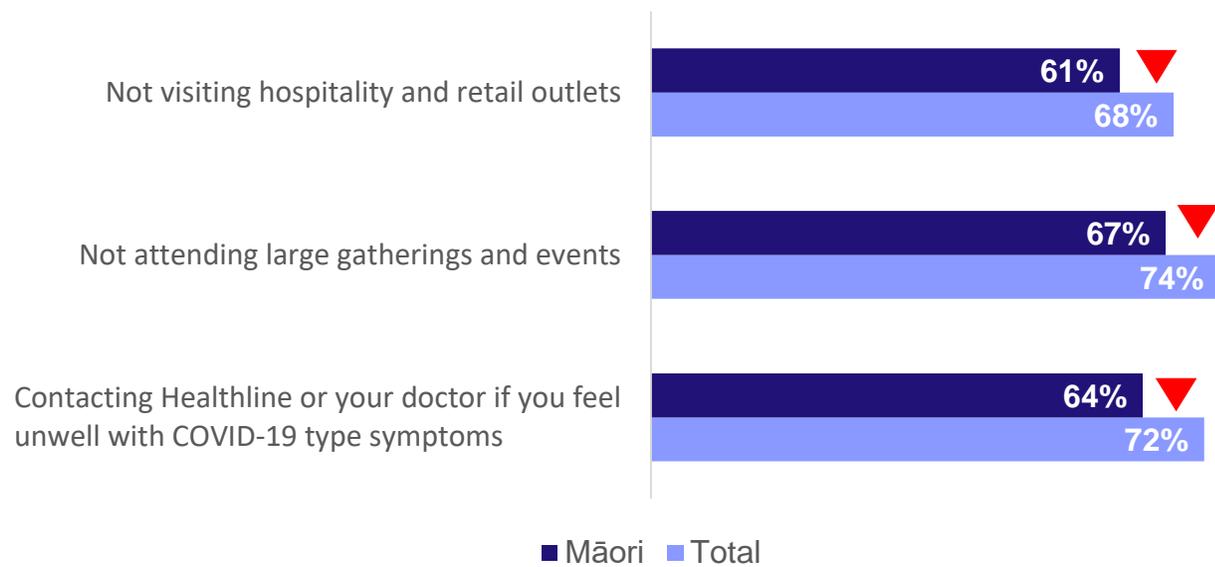


They are also significantly less likely to be happy to comply with some COVID-19 and Alert Level guidelines



COMPLIANCE – VERY WILLING, HAPPY TO COMPLY

However, their overall compliance across other metrics is comparable to total sample.



Q25: If there was a shift to Alert Level 3, how willing would you be to do the following? <STATEMENT (Very willing, happy to comply)
 Q: How willing are you to do the following? <STATEMENT> (Very willing, happy to comply)
 Base: Total sample n=1853, Māori: n=255



When it comes to compliance, they see friends and family as a key motivator

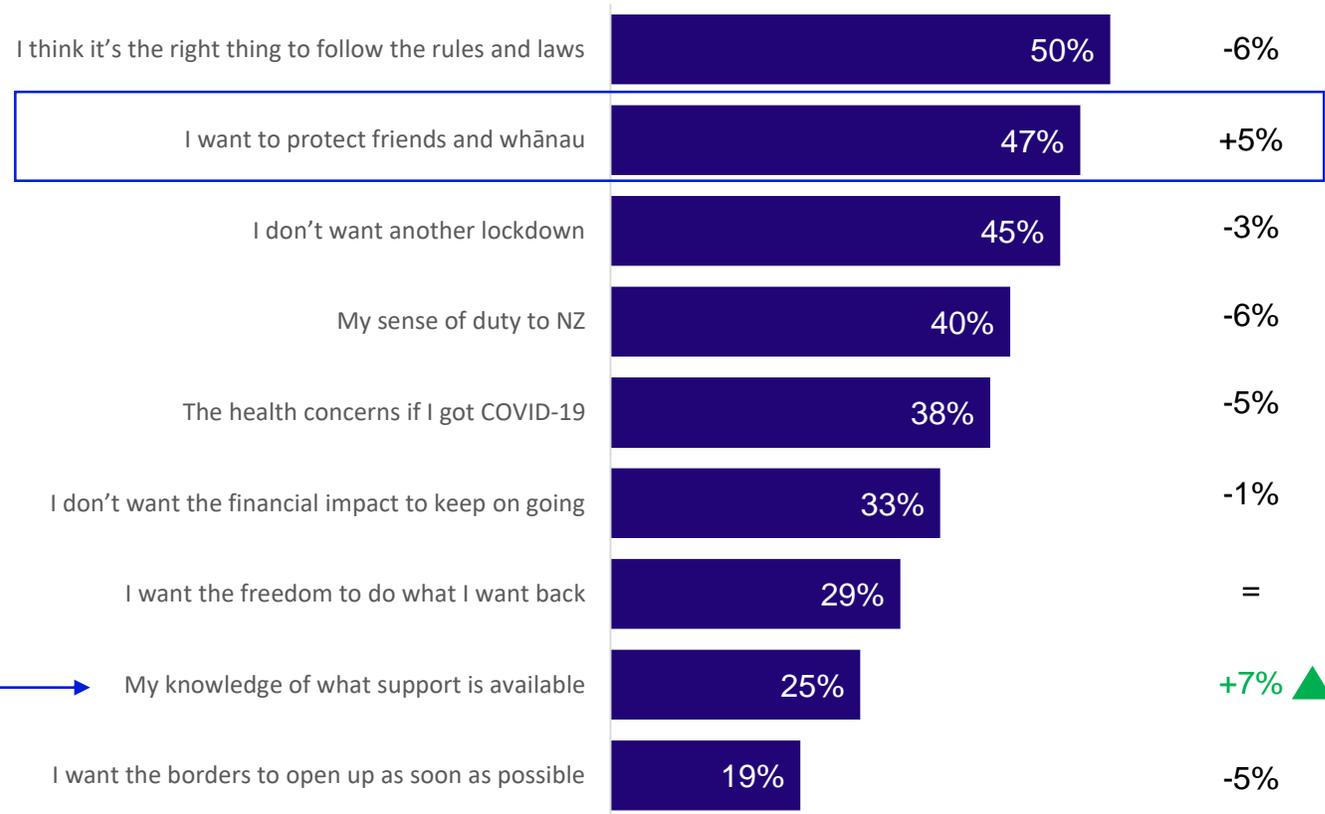
Wanting to protect friends and whānau is a stronger motivator for Māori.

It is their second highest motivator, but the fifth highest for the total sample.

They are also significantly more likely to be motivated by having the right information.

MOST LIKELY TO MAKE YOU FOLLOW COVID-19 GUIDELINES

Vs. total sample



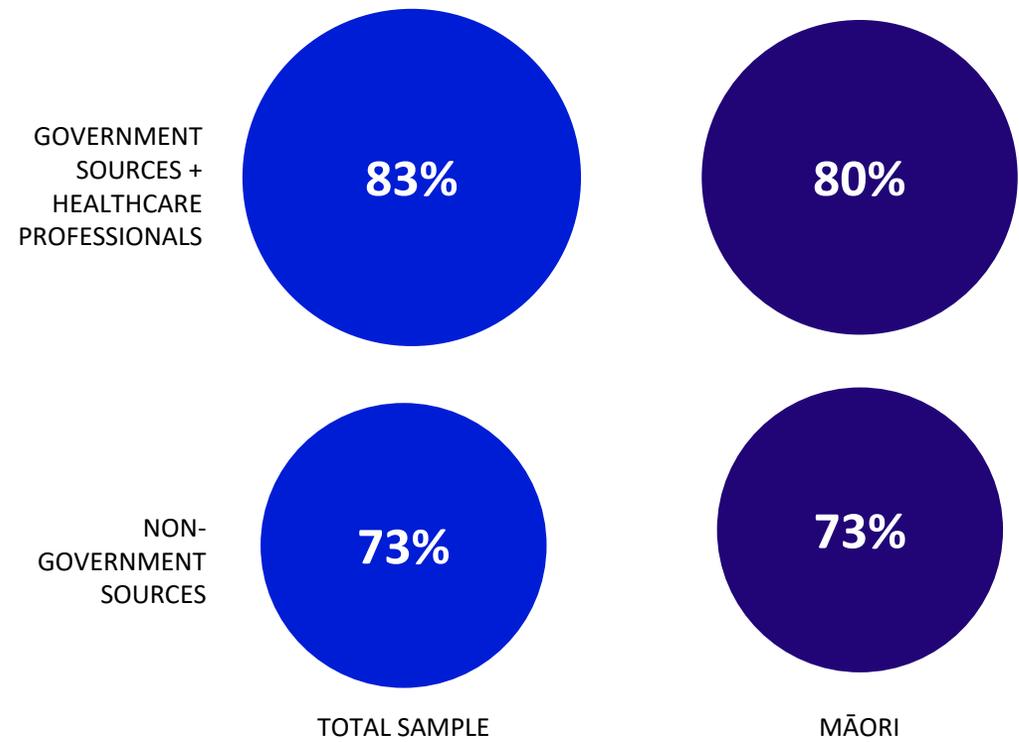
Q24: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?
 Base: Total sample n=1853, Māori: n=255.



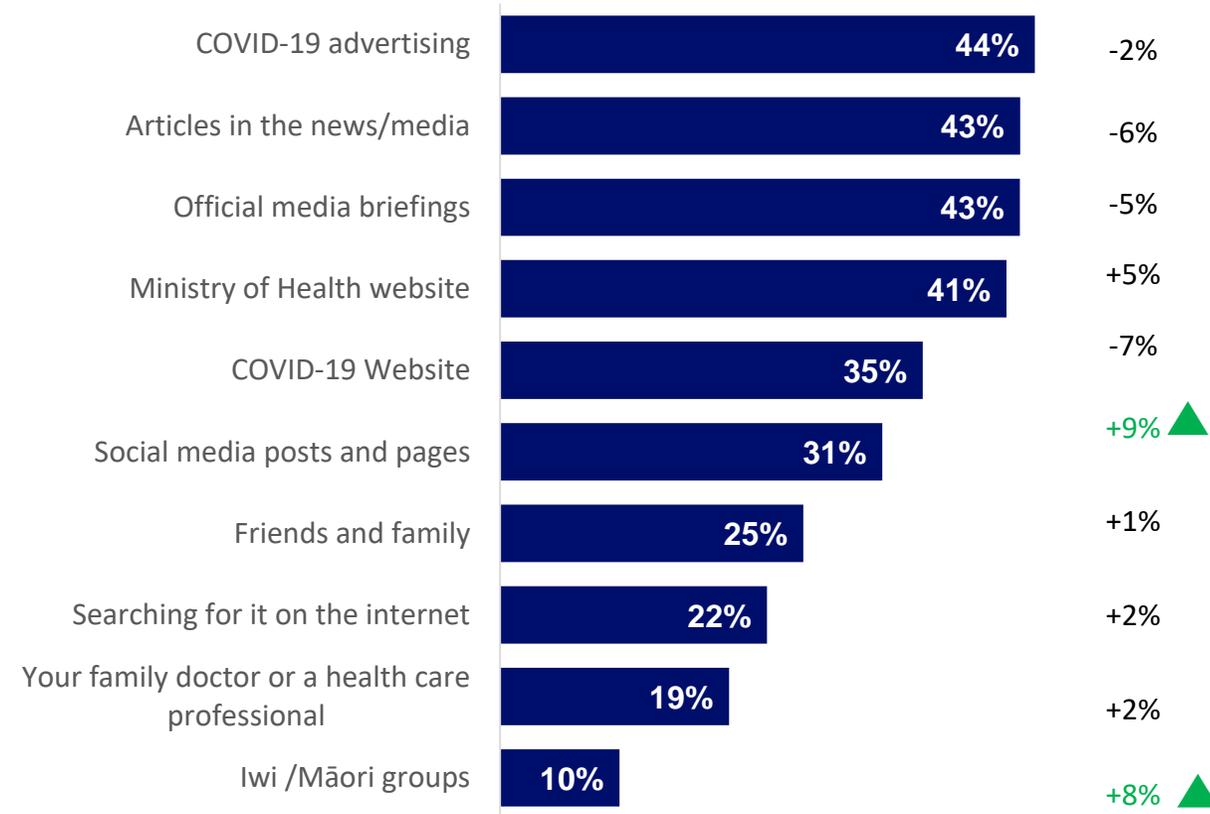


Sources are similar for Māori as for the total population

INFORMATION SOURCES



TOP INFORMATION SOURCES



Q19: 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 etc.?

Q21: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?

Base: Total sample n=1853, Māori: n=255.

IMPLICATION

Financial betterment is a top goal for Māori, but they are concerned that COVID-19 could impact this

Despite feeling positive about their own lives, and that NZ is handling COVID-19 well, they are more likely to feel fear towards the COVID-19 situation in NZ. This stems from a worry that COVID-19 can impact their goals, particularly financial betterment.

Pasifika are significantly more likely to see their life at least a little bit better than before COVID-19

Pasifika

PERCEIVED DIFFERENCE IN LIFE COMPARED TO PRE COVID-19

	TOTAL	PASIFIKA
A little bit better, much better	27%	36% ▲
No difference	39%	26% ▼
A little bit worse, much worse	31%	35%

And they are in line with the total sample when it comes to their life progress, both in the present and in the future (feeling that they will continue their progress trajectory or make even more progress in the future).

LIFE PROGRESS – CURRENT AND FUTURE

	TOTAL	PASIFIKA
Currently making progress in life compared to two years ago	37%	38%
In the next 12 months will make more progress than before	41%	48%

Q7: Compared to two years ago, do you feel you're making ...

Q16: How different do you feel your life is now, compared to before COVID-19?

Base: Total sample n=1853, Pasifika n=112

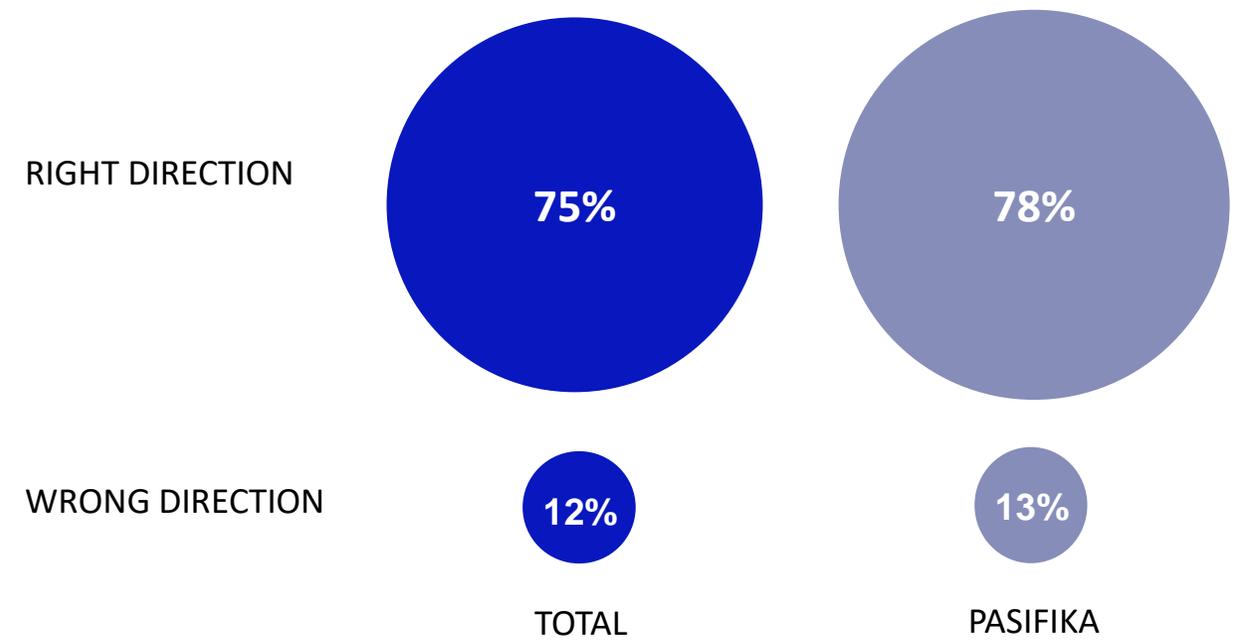




They also feel that New Zealand is heading in the right direction

PERCEPTIONS OF THE COUNTRY'S COVID-19 RESPONSE

Like the total population, they also feel that the country is handling the impact of COVID-19 well, and we're moving in the right direction.

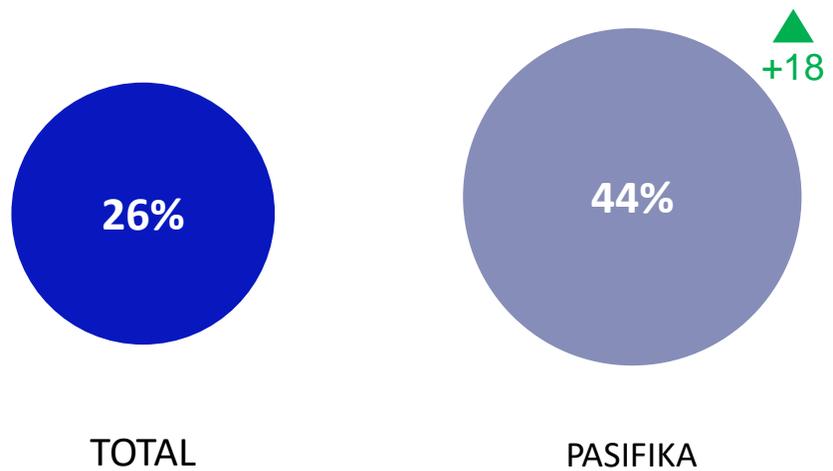


Q: How do you feel the country is going with handling the impact of and response to COVID-19?
Base: Total sample n=1853, Pasifika: n=112

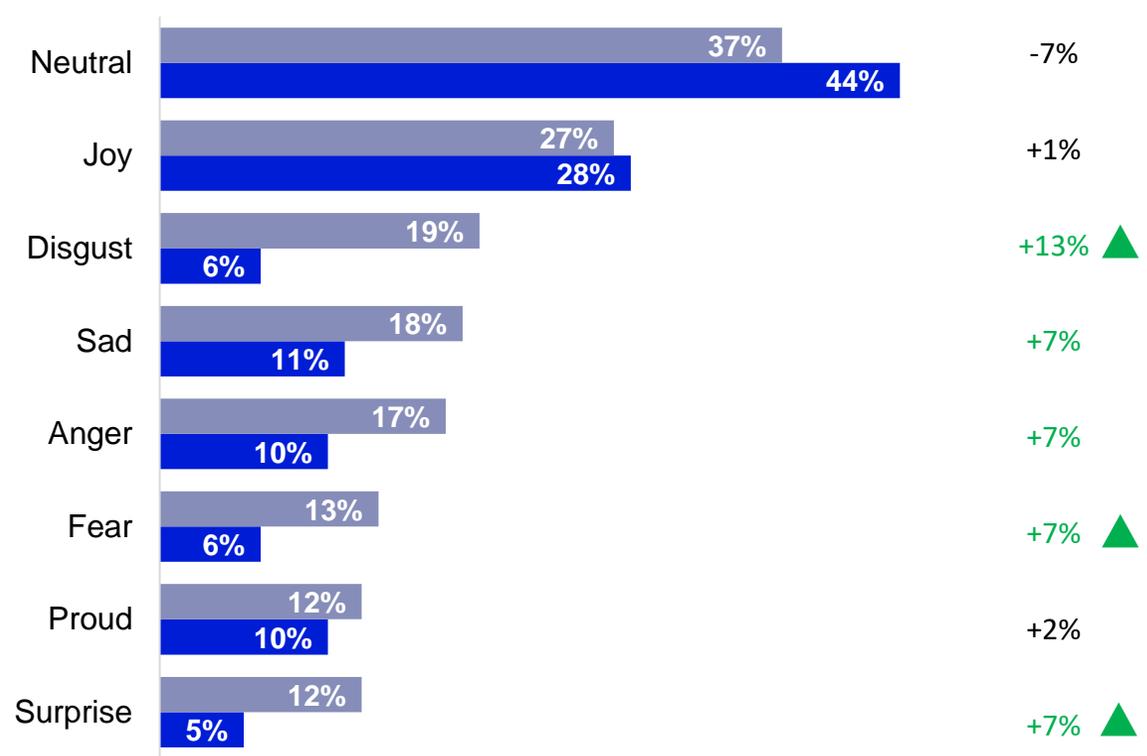


But they feel more negative emotions towards the COVID-19 situation in New Zealand than the total population

NEGATIVE EMOTIONS TOWARDS THE COVID-19 SITUATION IN NEW ZEALAND



NEGATIVE EMOTIONS – GRANULAR FOR PASIFIKA



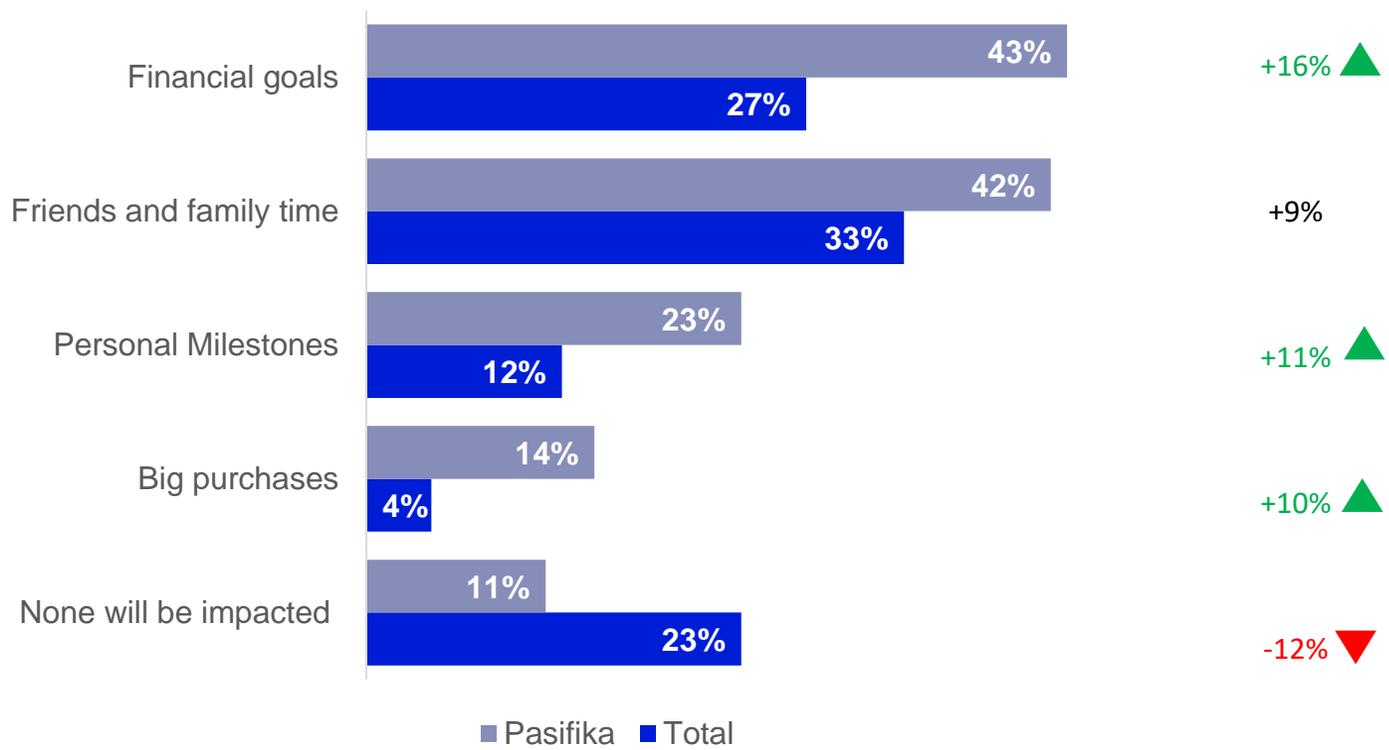
Q13: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?
 Base: Total sample n=1853, Pasifika n=112



This is partly underpinned by their concern that COVID-19 could impact their future goals

Particularly seeing friends and family (who live overseas), but they are also concerned about the impact COVID-19 could have on their financial goals, and their ability to achieve personal milestones and make big purchases.

CONCERNS THAT GOALS COULD BE IMPACTED BY COVID-19



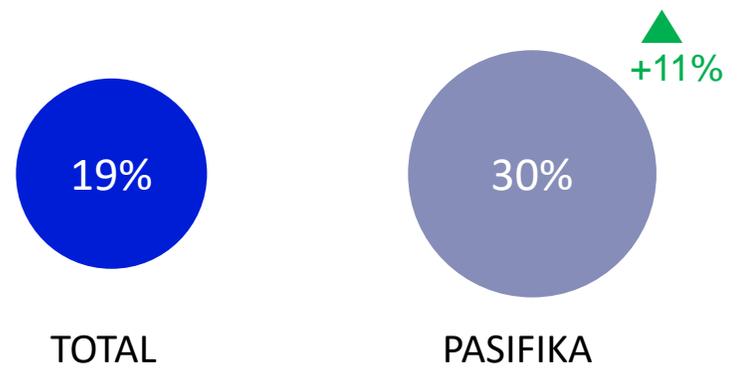
Q11: Do you have any worries that any of these could be impacted by COVID-19?
 Base: Total sample n=1809, Pasifika: n=112



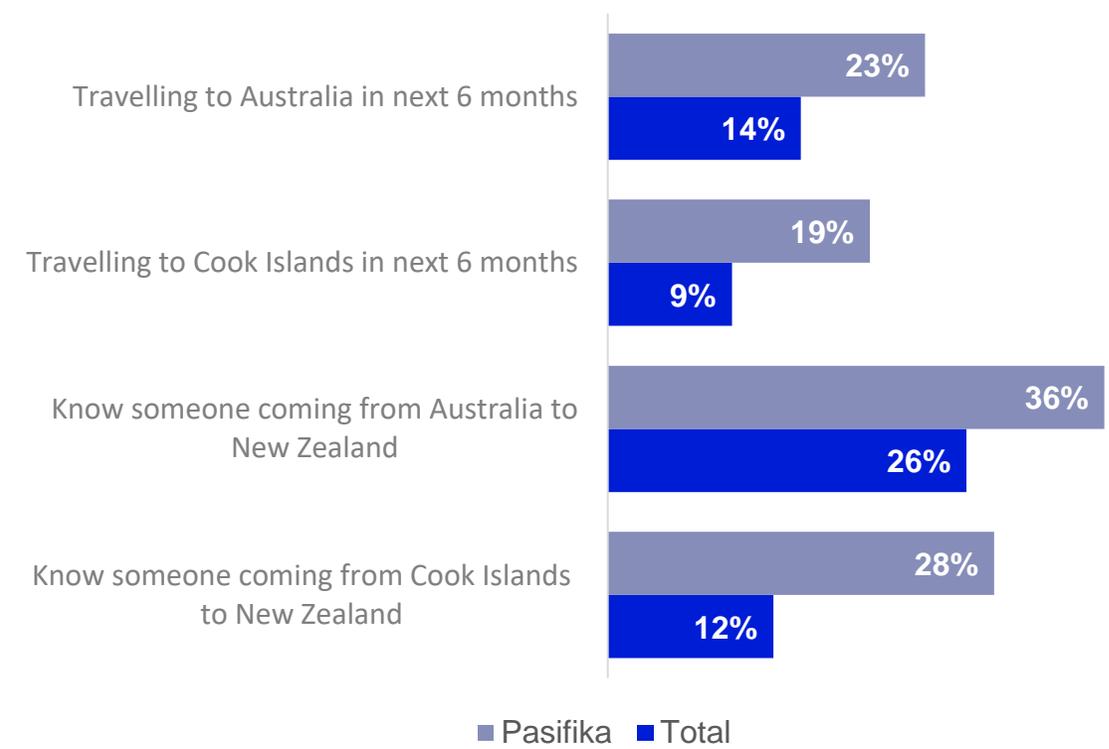
And their concern also stems from their collective mindset, hoping to see friends and family who live overseas

Pasifika are significantly higher on wanting to see friends and family in the next 12 months. This flows through in their high motivation to travel overseas in the next 6 months to be reconnected with loved ones offshore.

LOOKING FORWARD TO FRIENDS AND FAMILY VISITING FROM OVERSEAS IN THE NEXT 12 MONTHS



TRAVEL BEHAVIOUR – COMING TO AND FROM NEW ZEALAND



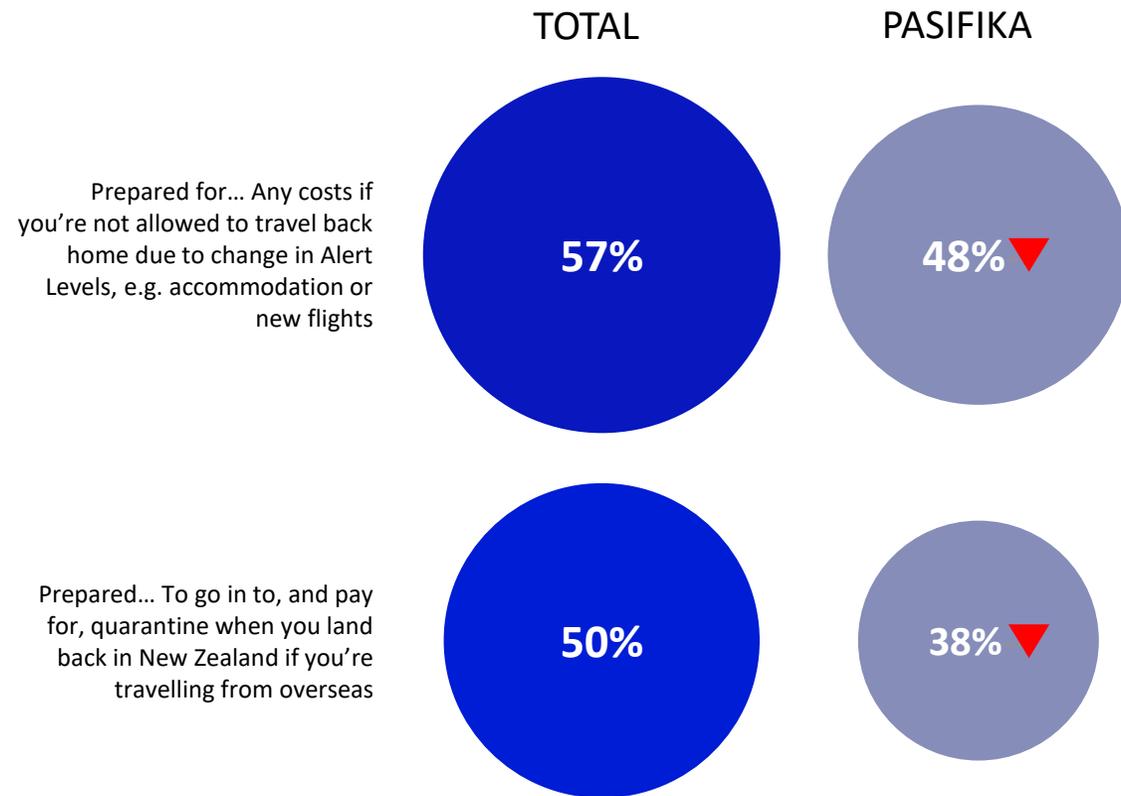
Q10: What are you looking forward to in the next 12 months?
 Q27: Q: Do you plan on travelling to...?
 Q28: Do you know anyone who is considering travelling to New Zealand from...?
 Base: Total sample n=1853, Pasifika n=112



But they are not as prepared for the risk of the bubble closing if they do travel

TRAVEL PREPARATIONS – CHANGE IN COVID-19 GUIDELINES

Pasifika are not as prepared to cover costs in the event that the bubble closed while they were travelling overseas.



Q29: Thinking about if you're travelling away from home, either outside your region or overseas... What do you think you need to prepare for?
 Base: Total sample n=1853, Pasifika sample n=112.





Pasifika are also less likely to comply with key COVID-19 and Alert Level behaviours

For many of these guidelines where we see significantly lower compliance Pasifika say that they **just won't do them**.

COMPLIANCE WITH KEY COVID-19 GUIDELINES

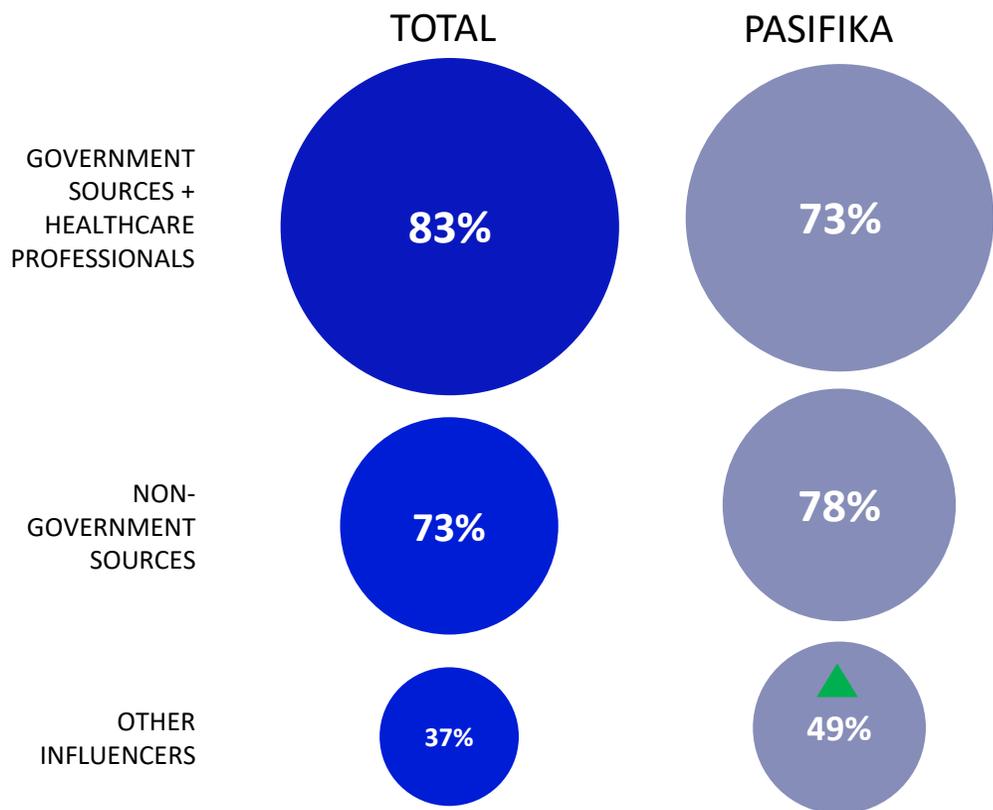


Q: How willing are you to do the following? (NET T2B: Very willing, happy to comply + I do it all the time, but I'm not that happy about it)
 Q: If there was a shift to Alert Level 3, how willing would you be to do the following? (NET T2B: Very willing, happy to comply + I do it all the time, but I'm not that happy about it)
 Base: Total sample n=1853, Pasifika sample n=112.

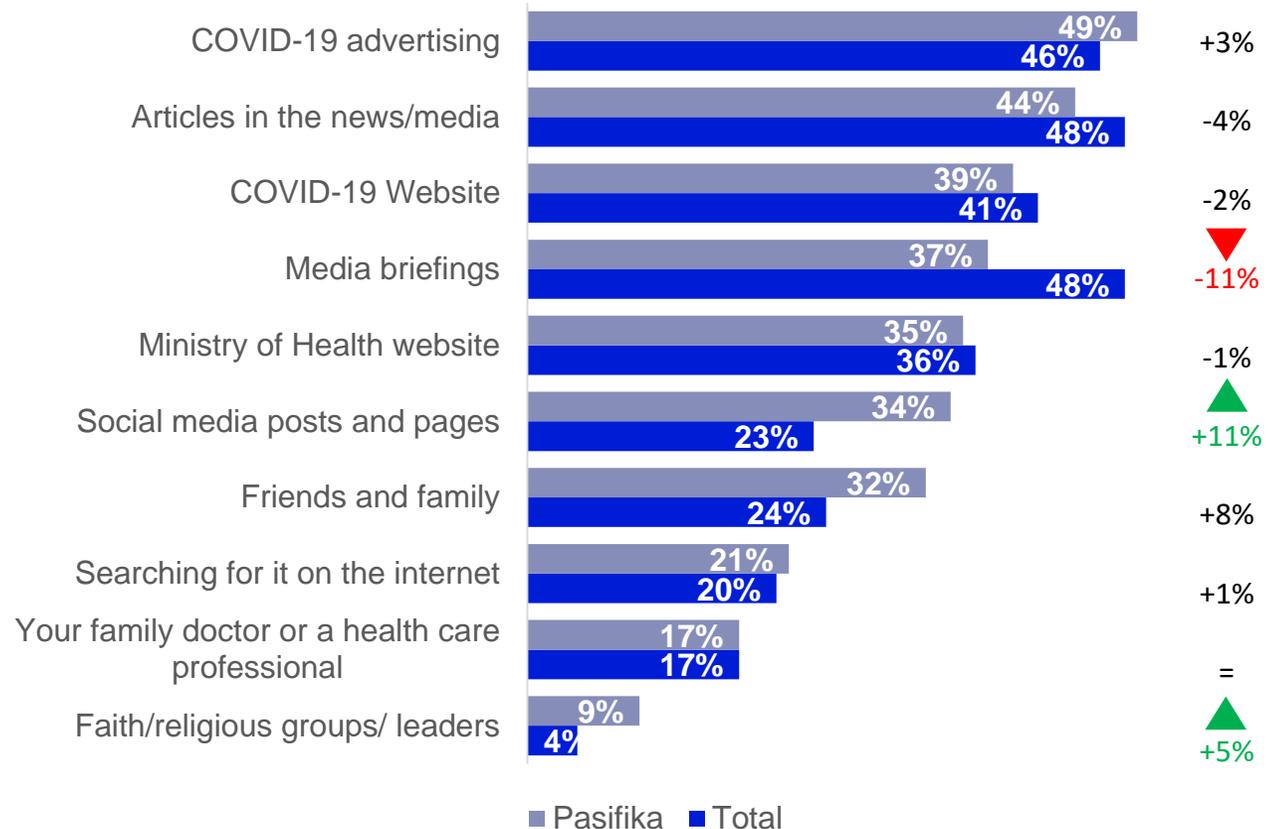


Pasifika are more likely to listen to other influencers

INFORMATION SOURCES



TOP INFORMATION SOURCES

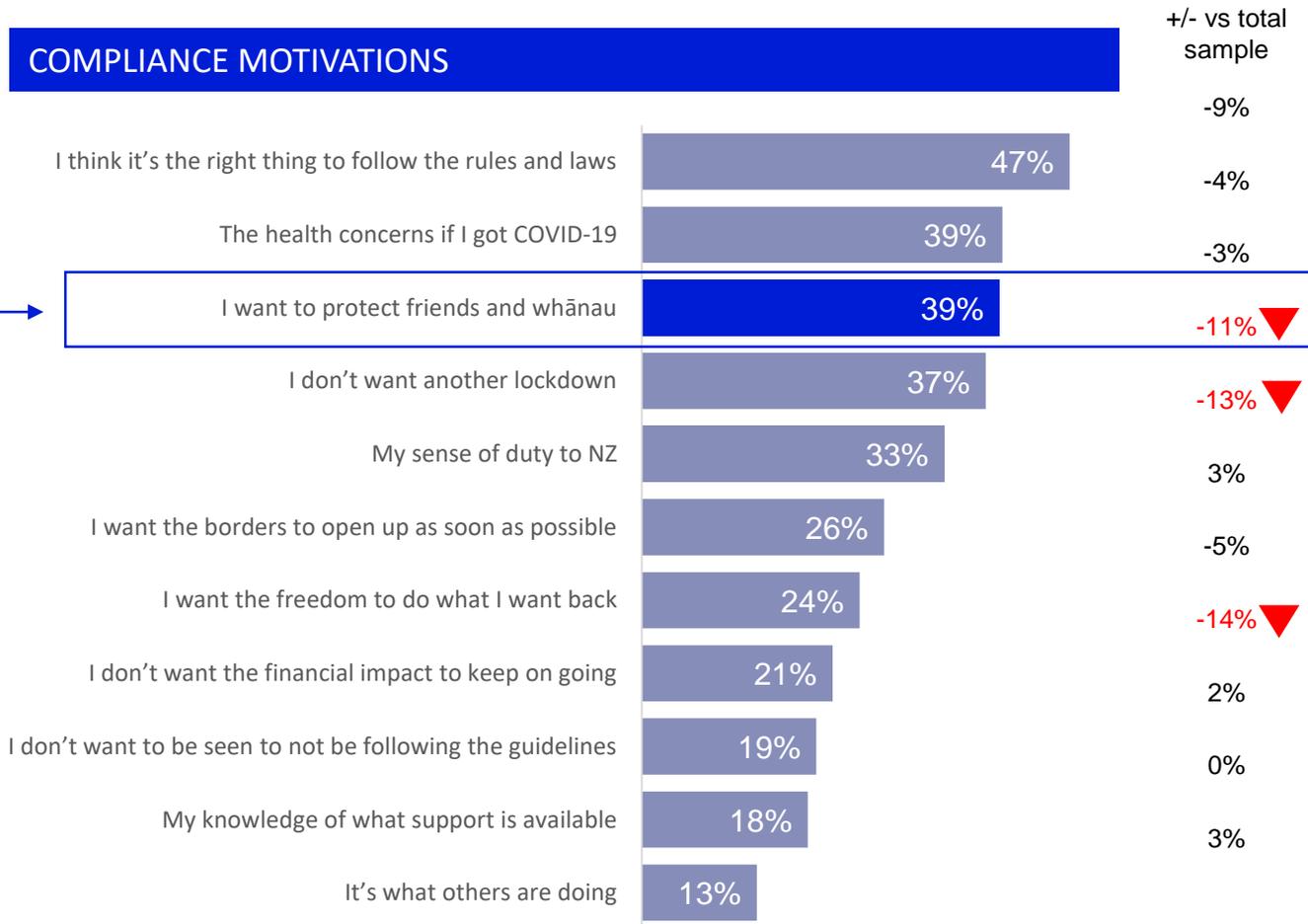


Q19 - Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, etc.?
 Q21: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done? (Other influencers: friends and family, politicians, employer, other public figures, community leaders)
 Base: Total sample n=1853, Pasifika: n=112.

And Pasifika are more motivated than the total population by protecting their friends and whānau



COMPLIANCE MOTIVATIONS



For Pasifika, protecting friends and whānau is a stronger compliance motivator, compared to the sample.

It's their third highest motivator but the fifth highest for total sample.



Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?
 Base: Total sample n=1853, Pasifika: n=112.



IMPLICATION

We need to motivate Pasifika to achieve greater compliance

Pasifika are feeling relatively positive about their own lives, and that NZ is handling COVID-19 well. But they feel more negative emotions towards the COVID-19 situation underpinned by their concern of the impact COVID-19 will have on them seeing family and friends overseas.

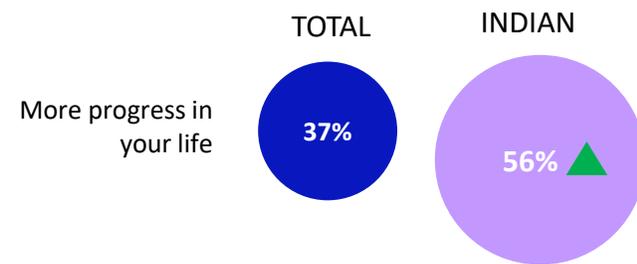
They have lower levels of compliance either because they aren't aware of the rules, due to being more largely influenced by 'other' influencers, or because they just won't do it.

They are motivated to protect their friends and family and want to travel overseas to see them, so this is an opportunity for motivating compliance with this group.

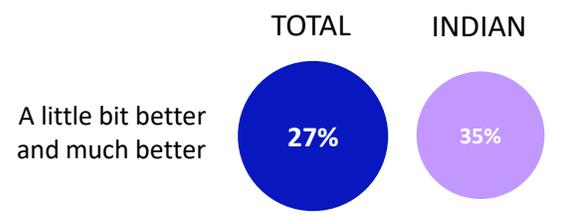
Overall, they feel positive around their life, and feel New Zealand is handling COVID-19 well



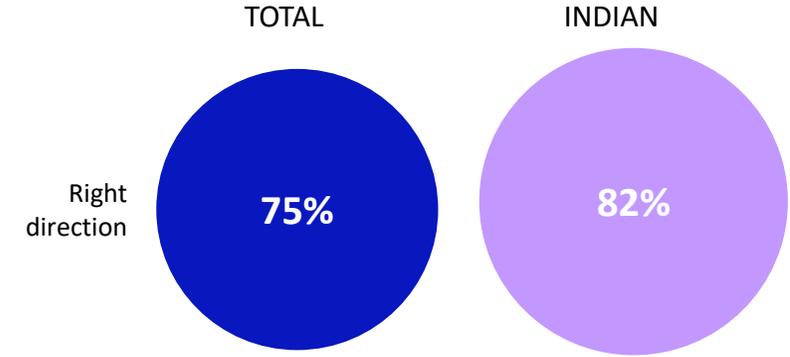
PERCEIVED PROGRESS – COMPARED TO 2 YEARS AGO



CHANGES COMPARED TO BEFORE COVID-19



PERCEIVED CHANGE COMPARED TO BEFORE COVID-19

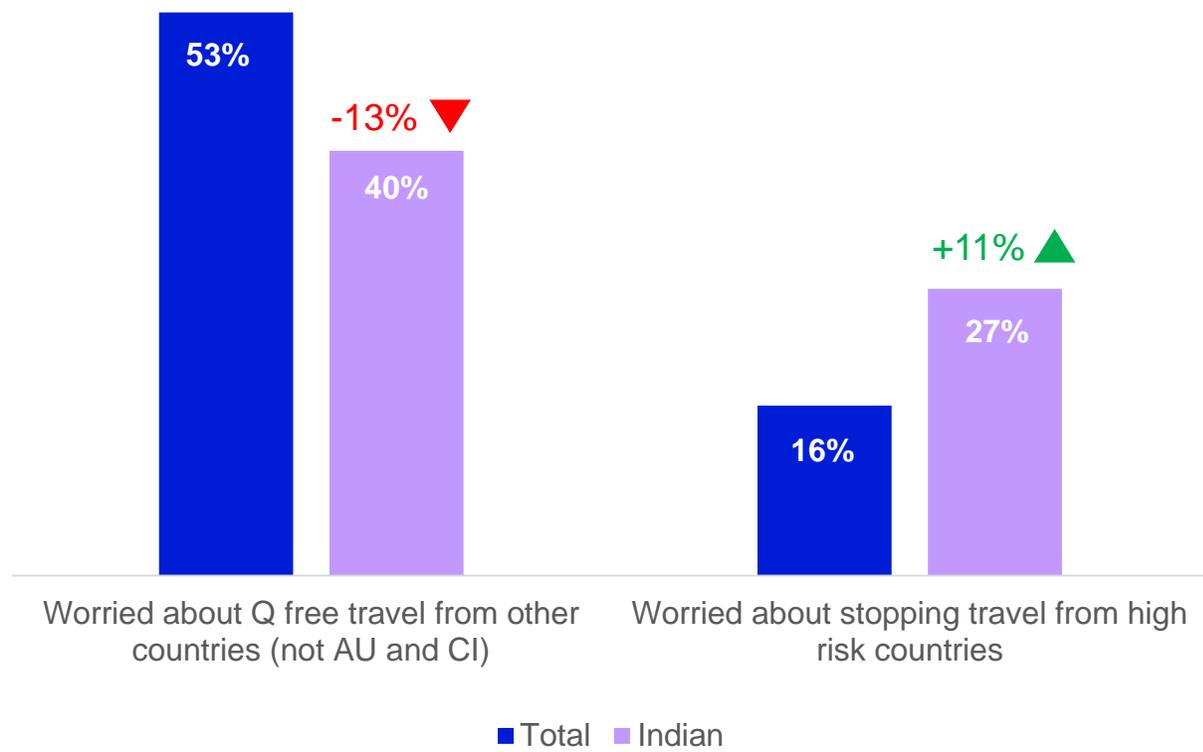


Q7 - Compared to two years ago, do you feel you're making ... Q16 - How different do you feel your life is now, compared to before COVID-19? Q15 - How do you feel the country is going with handling the impact of and response to COVID-19?
 Base: Total sample n=1853, Indian n=66.

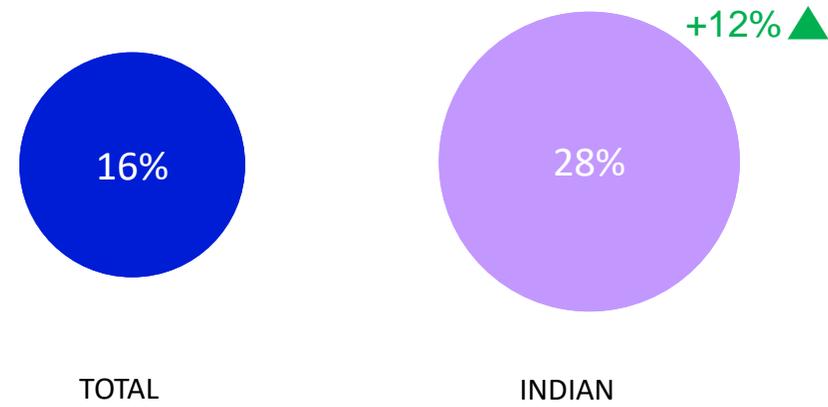
They are also more open to international travel to New Zealand, including travel from high-risk countries



SENTIMENT TOWARDS TRAVEL TO NEW ZEALAND



Those happy about non-resident workers from any country coming to New Zealand



Q: How do you feel about the following?
Base: Total sample n=1853, Indian n=66.



IMPLICATION

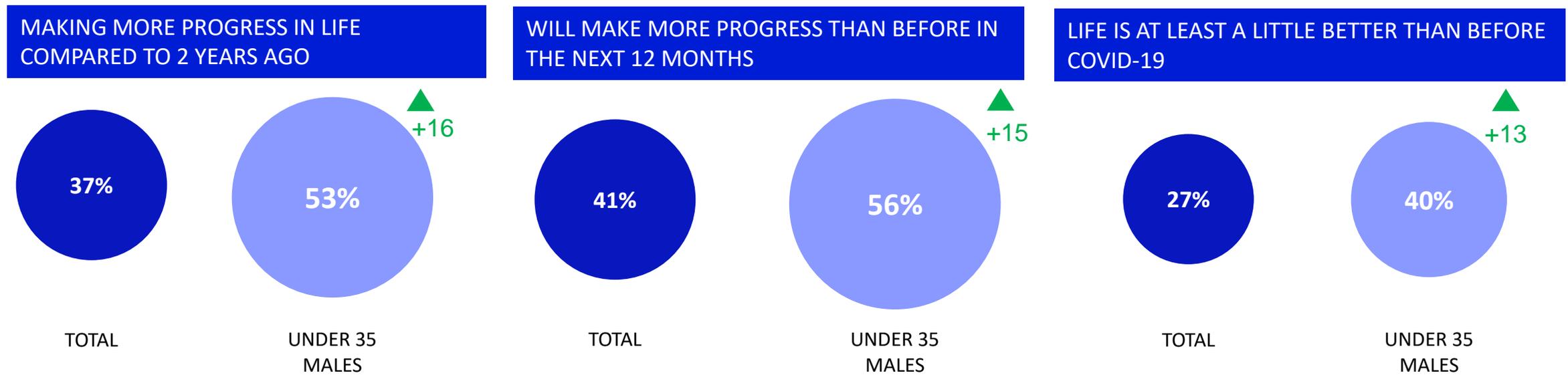
The borders opening up further is a key motivator for Indians, but we need to proactively manage their expectations

Indians feel positive about their life, and feel New Zealand is handling COVID-19 well. They are also compliant to health and Alert Level behaviours.

They are more motivated for the borders to re-open further, unlike the rest of the population. The job to do here is to proactively manage expectations so that this group does not become disengaged.

Under 35 males feel their life is better than before COVID-19, and that it will continue to improve

Under 35 males

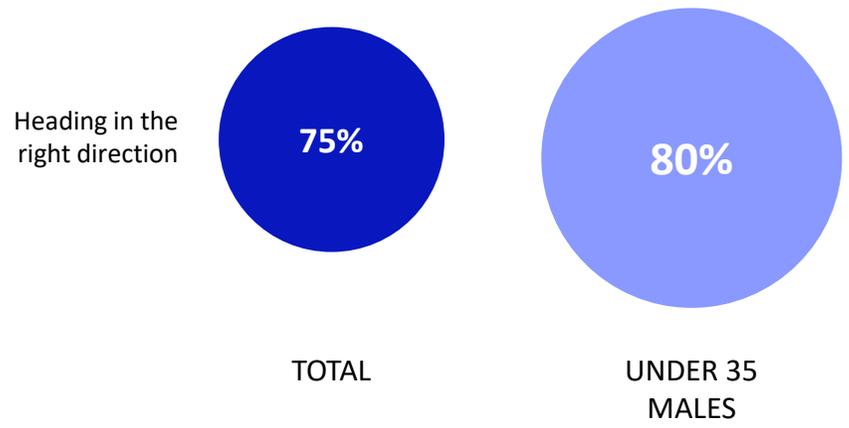


Q: Compared to two years ago, do you feel you're making ...
 Q: Do you think the next 12 months will see you make ...
 Q: How different do you feel your life is now, compared to before COVID-19? (NET T2B: Much better + a little bit better)
 Base: Total sample n=1853, Males under 35 n=211

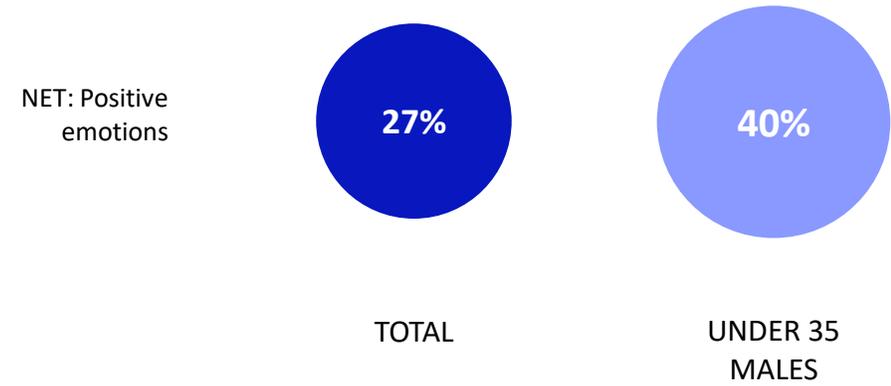
They also feel positive towards the COVID-19 situation in New Zealand

Under 35 males

PERCEPTION OF COUNTRY'S RESPONSE TO COVID-19



SENTIMENT TOWARDS COVID-19 IN NEW ZEALAND

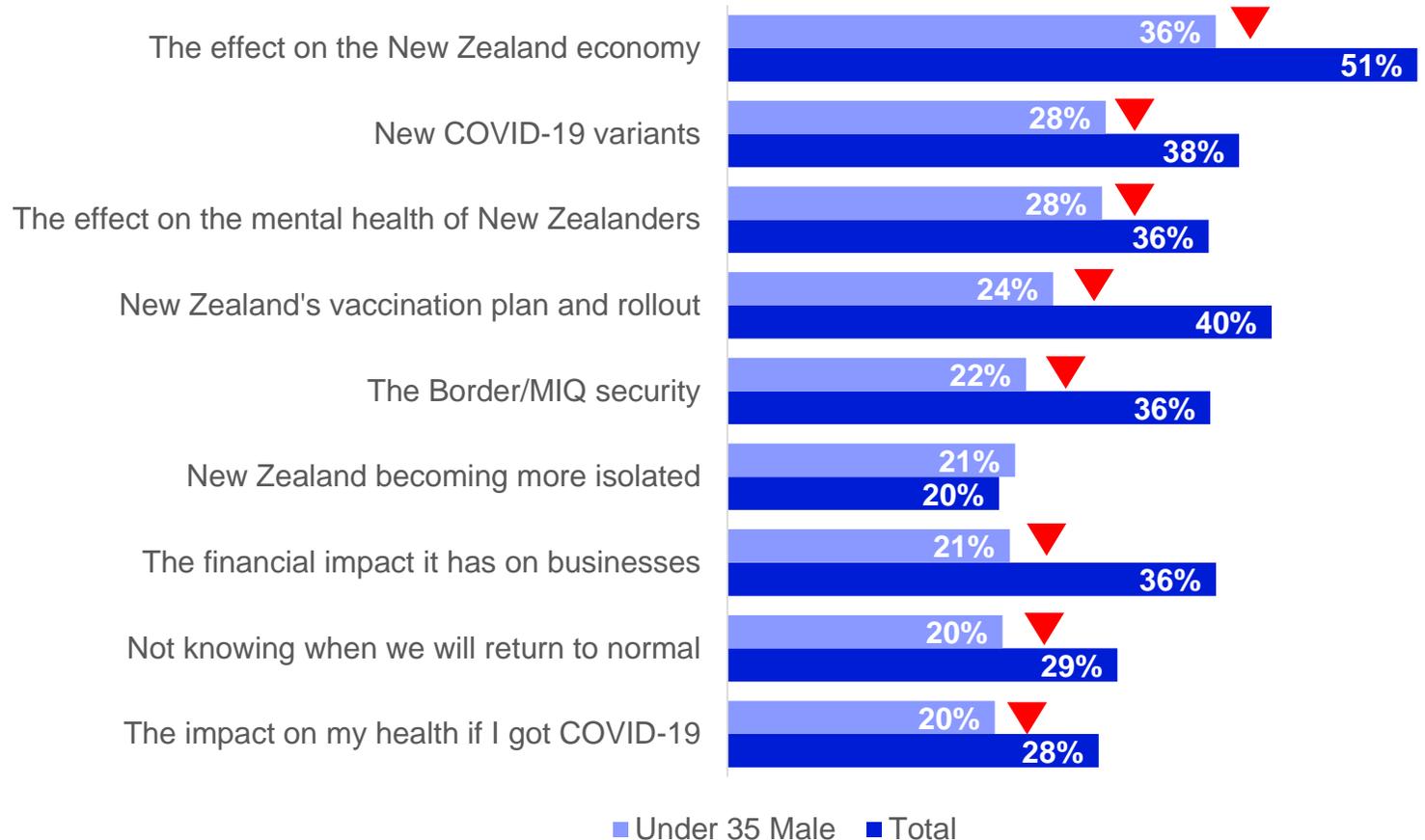


Q: How do you feel the country is going with handling the impact of and response to COVID-19?
Q: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand? (NET: Positive emotions – Joy, Proud)
Base: Total sample n=1853, Males under 35 n=211



Under 35 males are less engaged with the impacts of COVID-19 on New Zealand

CONCERNS SURROUNDING COVID-19'S IMPACT ON NZ – MALES UNDER 35 V TOTAL



■ Under 35 Male ■ Total

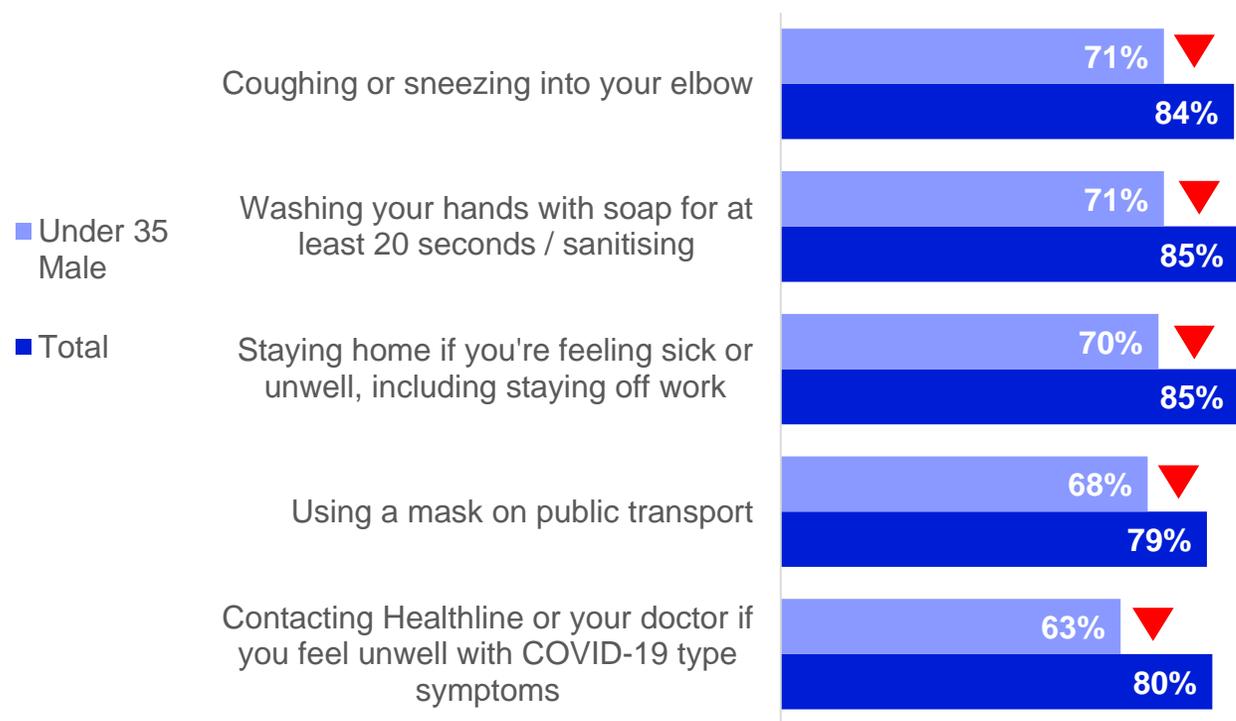
Q: What are you thinking about in terms of the impact of COVID-19 on New Zealand?
 Base: Total sample n=1853, Males under 35 n=211



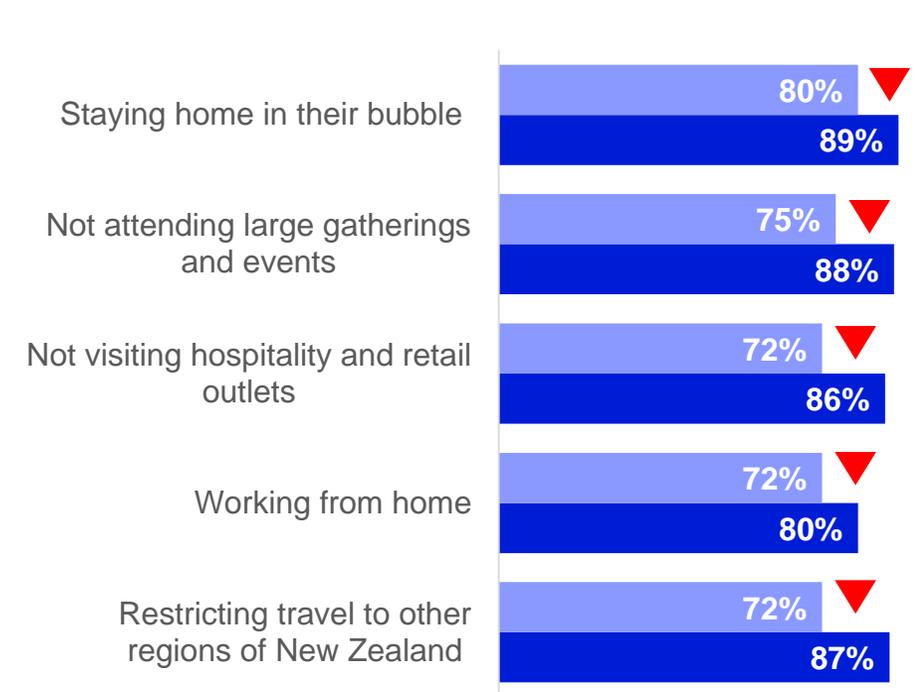
Younger males are also less compliant when it comes to COVID-19 guidelines

Under 35 males reallocate to “I do it when I think others expect me to”, where they are significantly higher than the total sample.

COMPLIANCE FOR KEY COVID-19 GUIDELINES



COMPLIANCE FOR KET ALERT LEVEL GUIDELINES



Q: How willing would you be to do the following ... ? <STATEMENT> (NET T2B Compliance: Very willing, happy to comply + I do it all the time but I'm not that happy about it)
 Q: If there was a shift to Alert Level 3, how willing would you be to do the following? <STATEMENT> (NET T2B Compliance: Very willing, happy to comply + I do it all the time but I'm not that happy about it)
 Base: Total sample n=1853, Under 35 males n=211

Under 35
males

While their compliance motivators are similarly ranked to the total population, their motivations are weaker



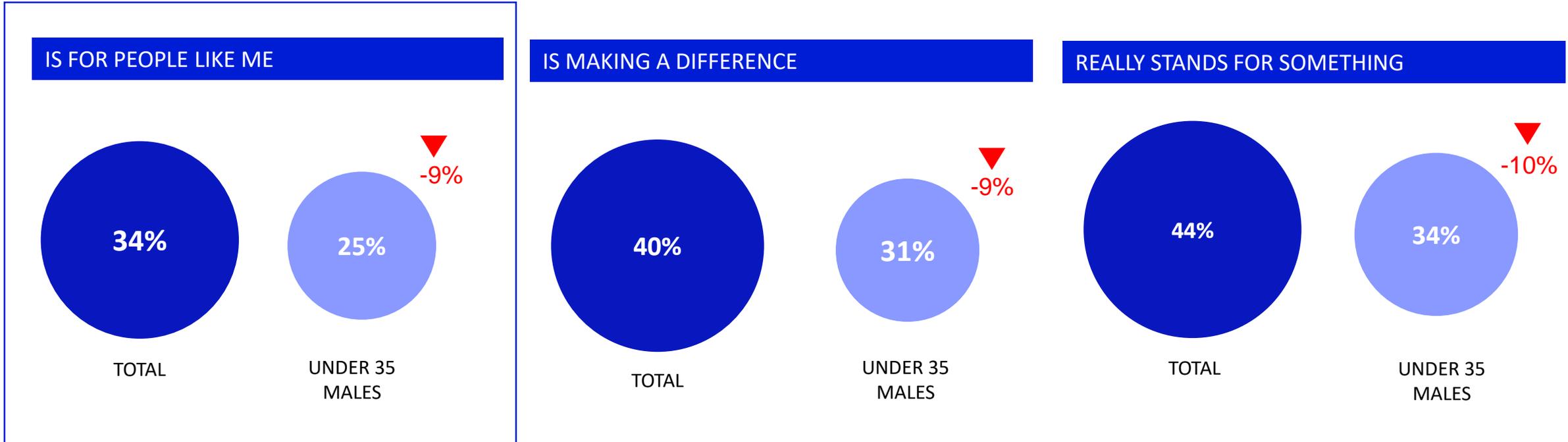
Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?
Base: Total sample n=1853, Under 35 males n=211



Under 35 males

Younger males have some weaker associations with the Unite Against COVID-19 brand, particularly in relevance

And they are also significantly less likely to feel that the brand really stands for something or is making a difference



Q: Do you feel that Unite Against COVID-19 ... <STATEMENT>
 Base: Total sample n=1853, Under 35 males n=211

IMPLICATION

We need to increase relevance to under 35 males to make them more compliant

Under 35 males feel positive about their life, and feel New Zealand is handling COVID-19 well.

But they are less engaged and motivated towards COVID-19 and this flows through to less compliant behaviours in comparison to the total population.

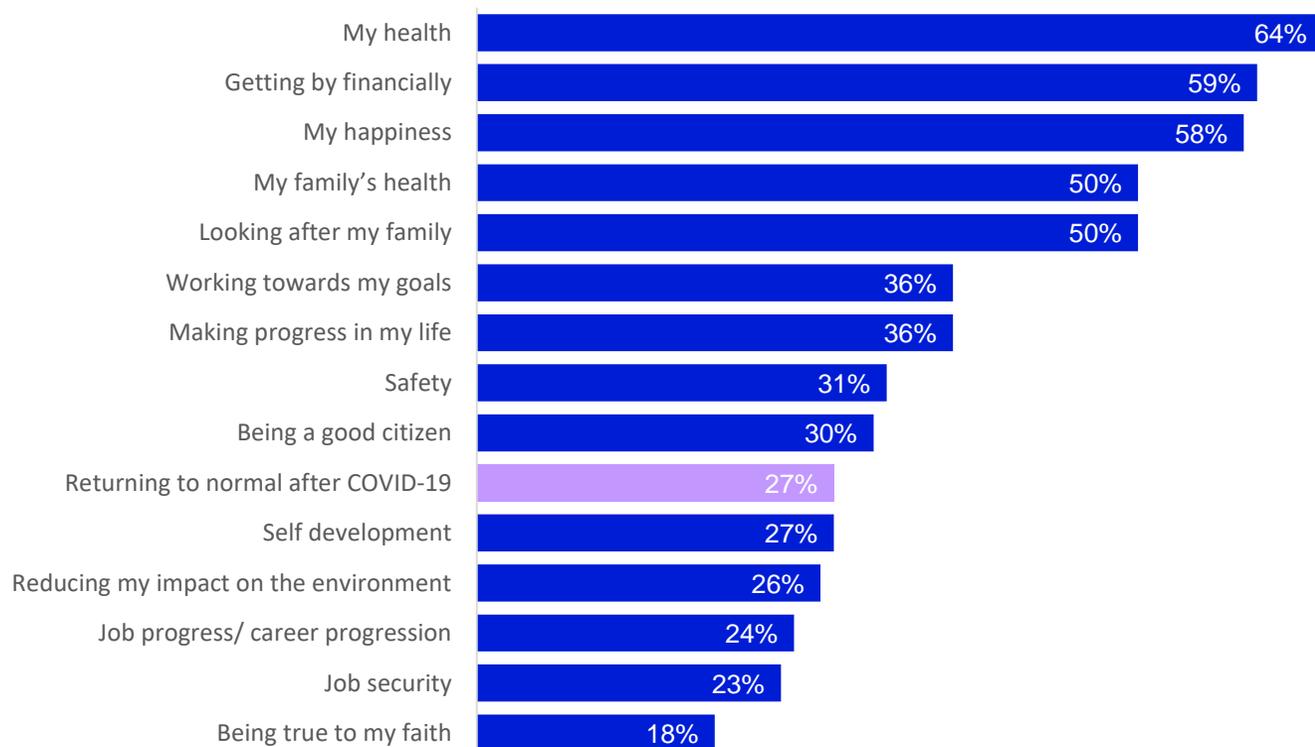
We need to make communications and messaging feel more relevant to this group to increase their engagement and overall compliance.

Appendix

TRA

Family, mental and physical health, and financial and life progress are top of mind for New Zealanders

WHAT ARE THE MAJOR THINGS IN LIFE THAT YOU THINK ABOUT?



While returning to normal after COVID-19 is not top of mind for New Zealanders. This signals that for most New Zealanders they feel they have established a new normal for themselves.

Q9: We would also like to get a sense of the things in life that you think about. First, what are the major things in life that you spend time thinking about?

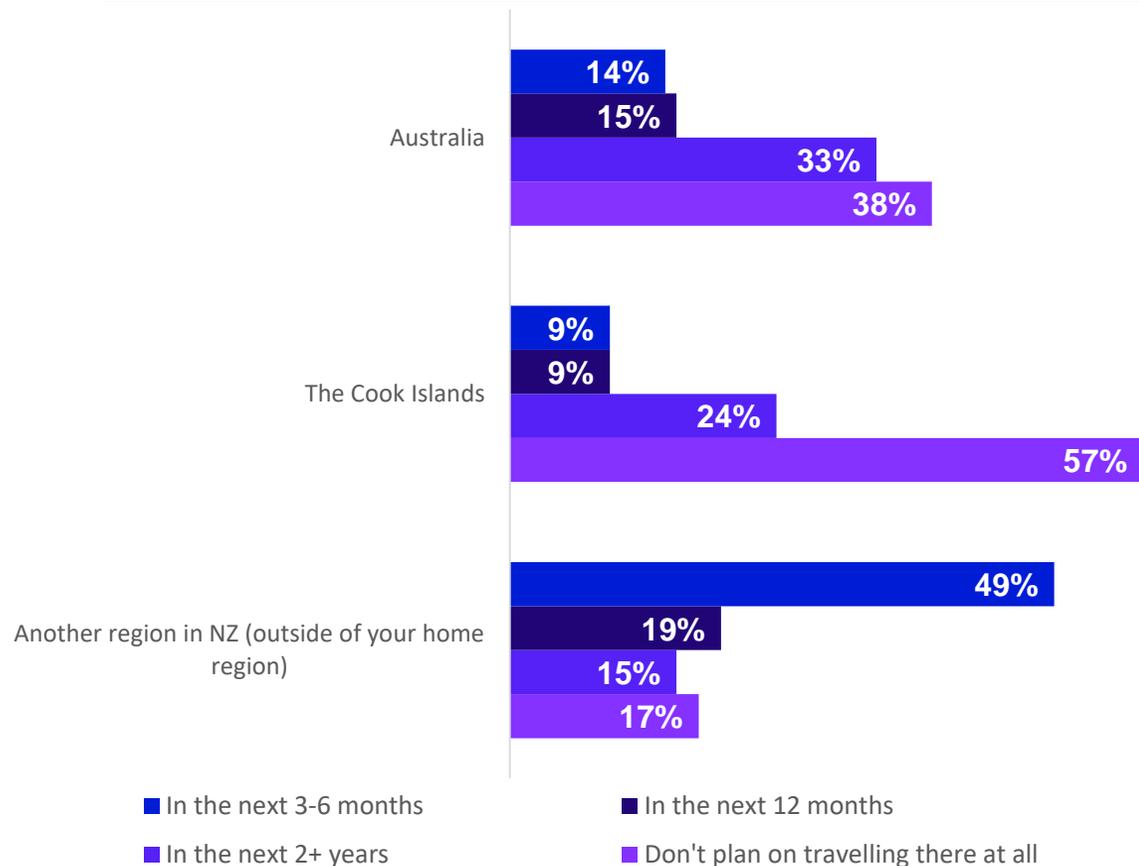
Base: Total sample n=1853

Travel Section

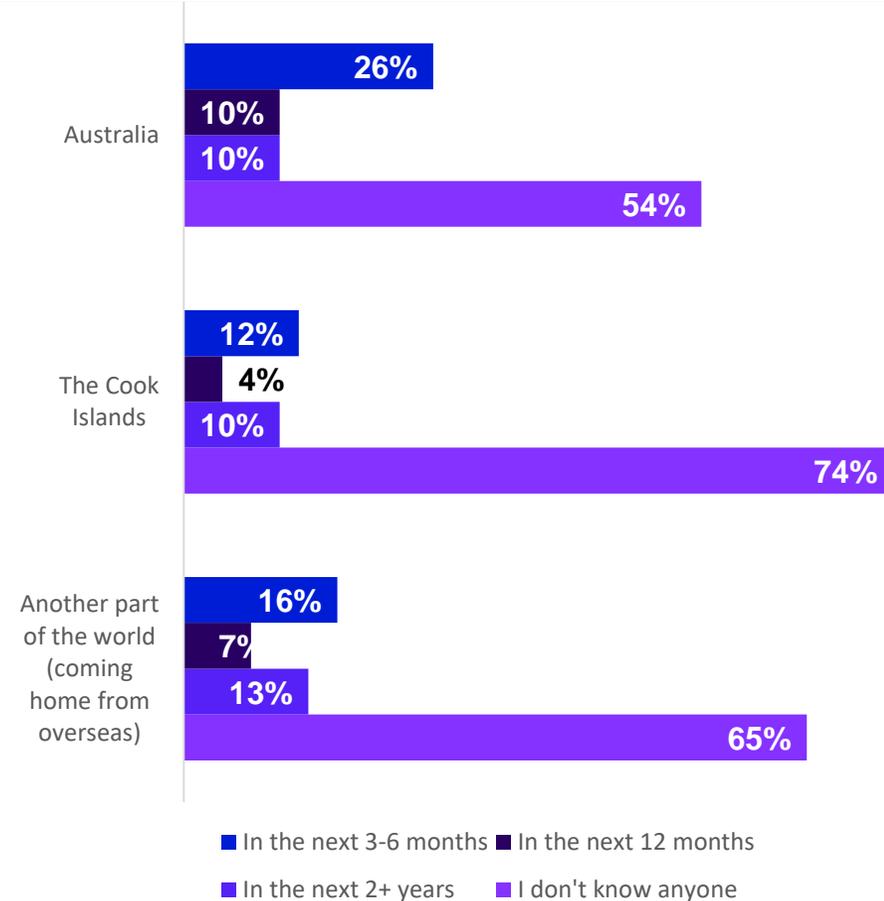
TRA

New Zealanders are most likely to travel within New Zealand

NEW ZEALANDERS TRAVELLING OUTSIDE THEIR HOME REGION



TRAVELLERS COMING TO NEW ZEALAND FROM OTHER COUNTRIES



Q: Do you plan on travelling to...?

Q: Do you know anyone who is considering travelling to New Zealand from...?

Base: Total sample n=1853

Travel preparation and plans

PREPARATIONS FOR TRAVELLING AWAY FROM HOME

Keeping yourself safe by following the health instructions, e.g. using a scanning app, wearing a face mask on public transport	65%
Any costs if you're not allowed to travel back home due to a change in Alert Levels, e.g. accommodation, new flights	57%
To go in to, and pay for, quarantine when you land back in New Zealand if you're travelling from overseas	50%
To organise and purchase new airfares, if you travelled by plane	40%
To cover the cost of any fines for entering an area you're not supposed to	25%
To hire and pay for rental cars to drive back home if required	23%
Not sure	13%
Nothing, travel insurance will cover everything	6%

PLANNING IN CASE OF TRAVEL GUIDELINE CHANGES

Yes, but I don't have plans in place at the moment	31%
No, I'll figure something out if it happens	26%
No and I don't know what I'd do	10%
Yes, and I have plans in place	23%
NET: Thought about what they would do	54%

Q: Thinking about if you're travelling away from home, either outside your region or overseas... What do you think you need to prepare for?

Q: Have you thought about what you would do if there was a change in travel guidelines and you couldn't return to your home region when intended?

Base: Total sample n=1853, Those travelling outside their home region n=1008