DECEMBER 2021

Behaviour & Sentiment November Update – including December pulse check

DEPARTMENT OF THE PRIME MINISTER AND CABINET

TRA

BACKGROUND

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

We are now adapting to living with COVID-19 in the community under the COVID-19 Protection Framework. This is a huge shift from the last wave in September at the beginning of the Delta outbreak where we were still pursuing an elimination strategy. There is a need to understand what concerns New Zealanders have while they adapt to life with COVID-19 in the community, and how to address these concerns.

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.

TRA

OVERALL OBJECTIVES

Understand how to keep New Zealanders engaged during our suppression strategy.

The specific number objectives we set out to answer:

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

Methodology

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

- Total sample n=917
- Margin of error at the 95% confidence interval is +/- 3.2%

Fieldwork ran from 15th to the 23rd of November.

Key samples:

- Māori n=168
- Pasifika n=72
- Unvaccinated n=62

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, 2021 October pulse and 2021 December pulse.

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.

TRA

Timeline

OCTOBER | NOVEMBER | DECEMBER

OCTOBER 5 11:59PM
Auckland moves to Level 3.1
Allowed to meet one other household outside

Parts of Waikato remain at Level 3

OCTOBER 11
Vaccination mandate for teachers and healthcare workers announced.

Must be double vaccinated by Jan 1 2022.

OCTOBER 22
COVID-19 Framework announced.

Pulse check conducted 22-24 Oct

OCTOBER 28
NZ MIQ stay shortened to 7 days MIQ + 3 days self isolation

NOVEMBER 2 11:59pm
Waikato moves to Level 3.2

Retail can reopen, can meet up to 25 people outside with no household limits. Public facilities open.

NOVEMBER 8 11:59pm
Auckland moves to Level 3.2

15 - 23 NOVEMBER
November fieldwork period

NOVEMBER 17
Announced that Aucklanders will be able to travel for Christmas from Dec-15.

The country will have moved to the traffic light system by this time regardless of vaccination levels.

AstraZeneca Vaccines arrive in New Zealand.

Christchurch confirms a COVID-19 case.

NOVEMBER 21
Vaccine certificate system announced to come into effect on December 3.

NOVEMBER 29
MIQ announcement – Staggered introduction of fully vaccinated New Zealanders able to self-isolate for 7 days instead of MIQ.

DECEMBER 3
New Zealand moves to the red and orange settings of the COVID-19 Protection Framework.

7 – 8 DECEMBER
Pulse check conducted

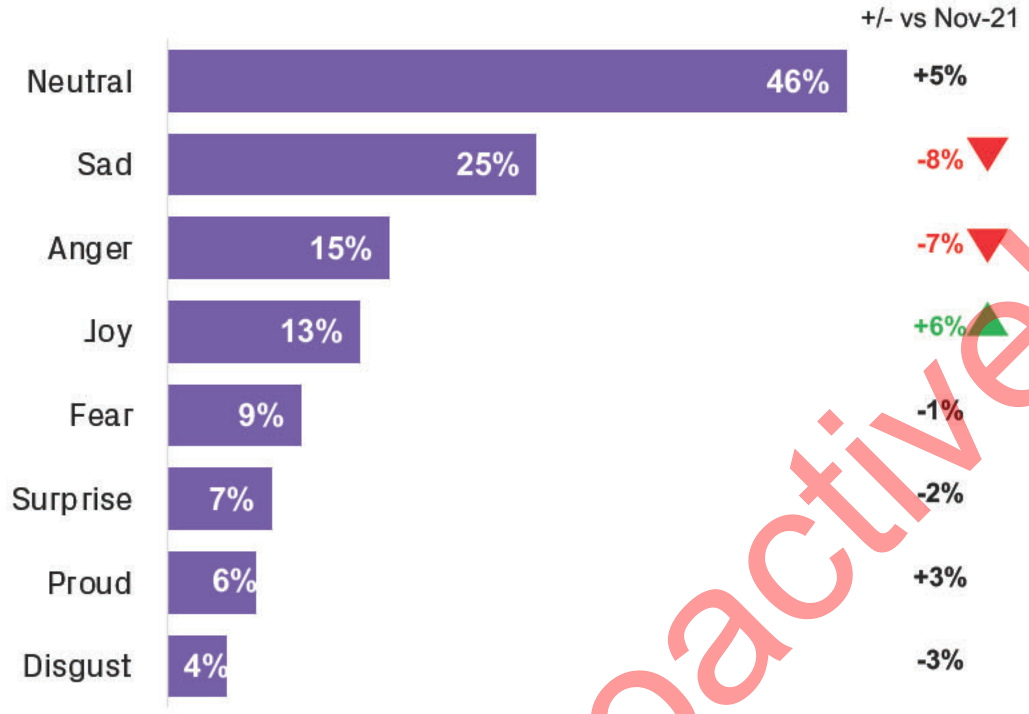
Agenda

1. COVID-19 Sentiment
2. Information access and needs
3. Behaviour and compliance
4. Vaccine

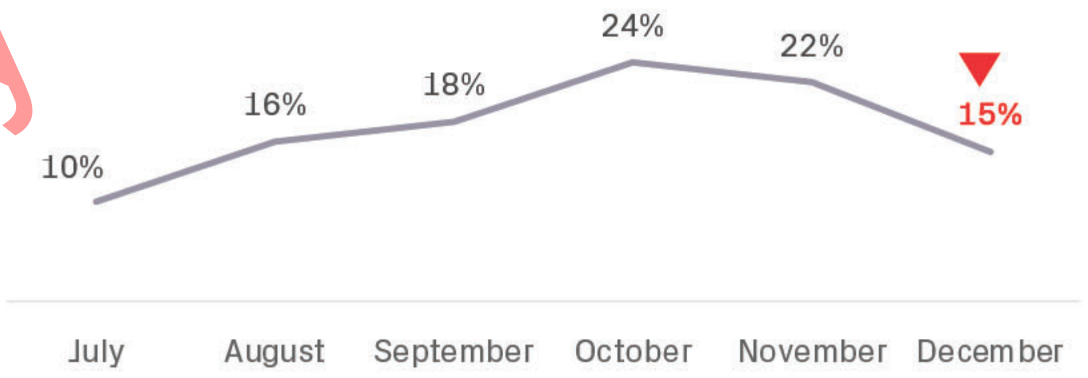
COVID-19 sentiment

Now that we are living in the Covid-19 Protection Framework, negative feelings are starting to subside

SENTIMENT TOWARDS THE COVID-19 SITUATION IN NZ – DECEMBER 2021



ANGER OVER TIME



Source: 7 December Pulse 2021, Behaviour and Sentiment Tracker July 2021, September 2021, November 2021 & Aug 27-30 Pulse
Q: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?
Base: 7-Dec Pulse total sample n=411, Nov-21 total sample n=917, Sep-21 total sample n=846, Aug-21 sample n=305, Jul-21 sample n=823

Significantly higher / lower than previous wave

TRA

With the easing of restrictions, there is a returned feeling of progress, with vaccinations seen as the key to keeping us safe

OF THOSE FEELING 'JOY' AND 'PROUD' IN DECEMBER

18%
Vaccination keeps us safe

" With high vaccination rates I hope that the worst is behind."

"'I'm having my third vaccine on the 14th of Dec. That feels really great. I know I am keeping myself safe, not passing the virus on."

"Good rate of covid vaccinated people so going well so far."

13%
Feelings of progress

"Feel that NZ is on track."

"Life is good, job is good and I feel with covid we are getting somewhere."

"I'm fairly happy with the way life is progressing right now."

9%
Restrictions easing

We are moving onto a new strategy given the high vaccination rate which is promising."

"Happy that life is finally returning to normal."

"Restrictions are easing and I can reconnect with friends and family."

4%
Feel good in comparison to other countries

"There is no better situation in any other developed country (lowest mortality rate, low unemployment, good GDP)."

"It's not the best but better than many other countries."

Source: 7 December Pulse 2021
Q: And why is that?
Base: 7-Dec Pulse - those feeling joy and proud n=68

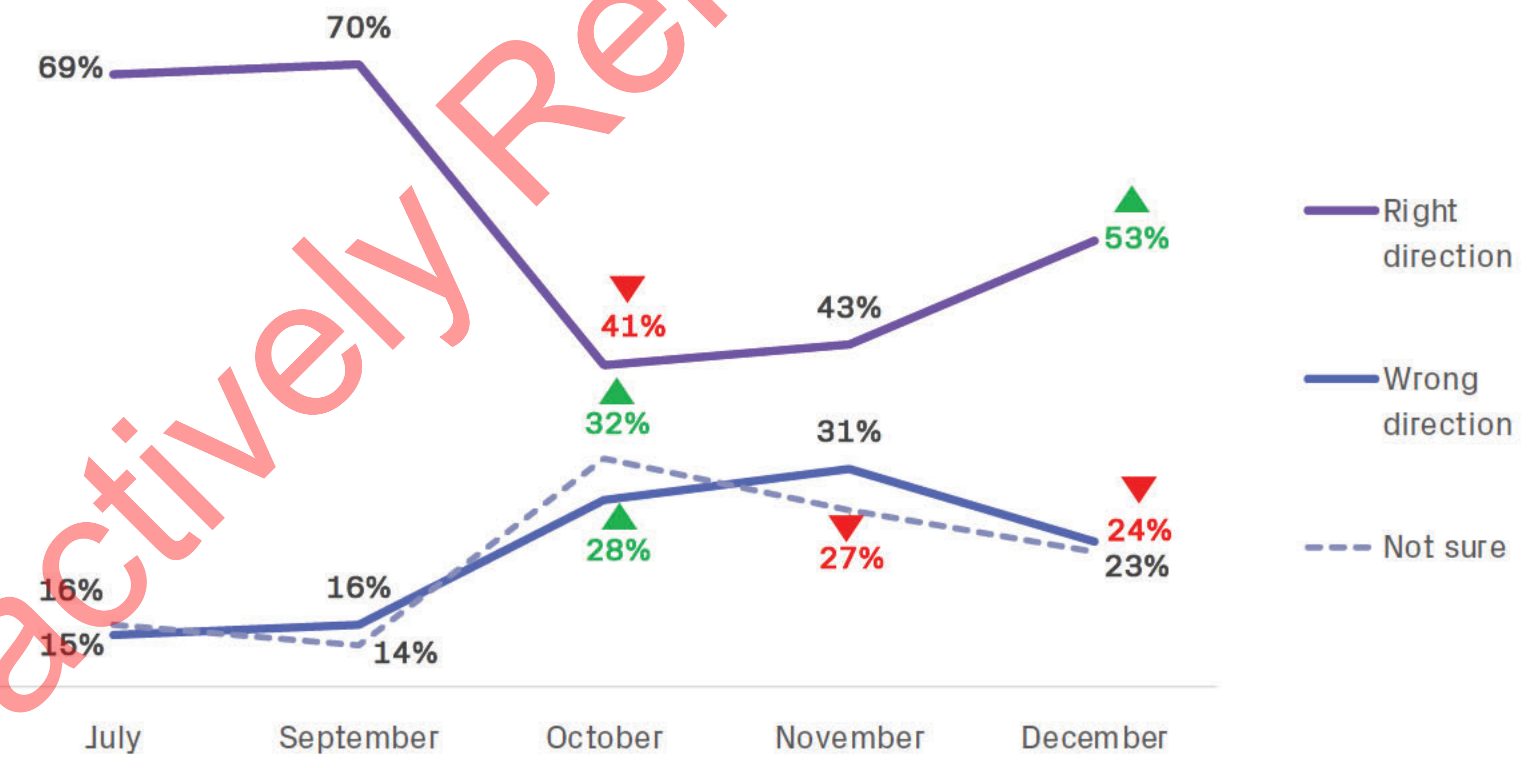
TRA

Following October's dip, New Zealanders are starting to believe that once again, we are heading in the 'right direction'

We first saw this drop in confidence in October, which held through to November.

In December, we have seen a significant increase in 'right direction' (53%, +10%). While this is still below September levels, we are seeing signs of confidence being restored.

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



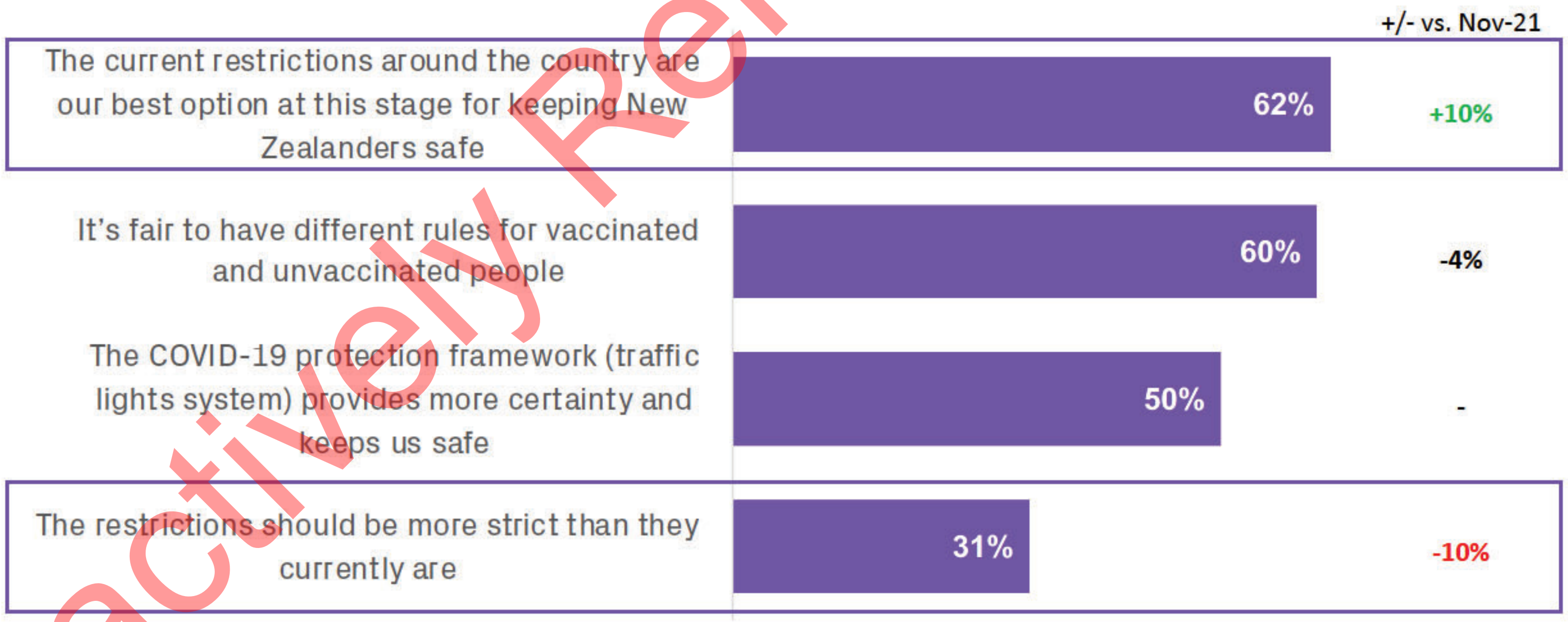
Source: 7 December Pulse 2021 & Behaviour and Sentiment Tracker July 2021, September 2021, November 2021
Q: How do you think the country is going with handling the impact of and response to COVID-19?
Base: 7-Dec Pulse total sample n=411, Nov-21 total sample n=917, Sep-21 total sample n=846, Jul-21 sample n=823

Significantly higher / lower than previous wave

Compared to November, we are now feeling more comfortable with the safety of the new approach

We have seen a **significant uplift** in those that feel the current restrictions are the best option to keep us safe, coupled with a **significant decline** in feelings that restrictions should be more strict.

AGREEMENT WITH KEY STATEMENTS - DECEMBER

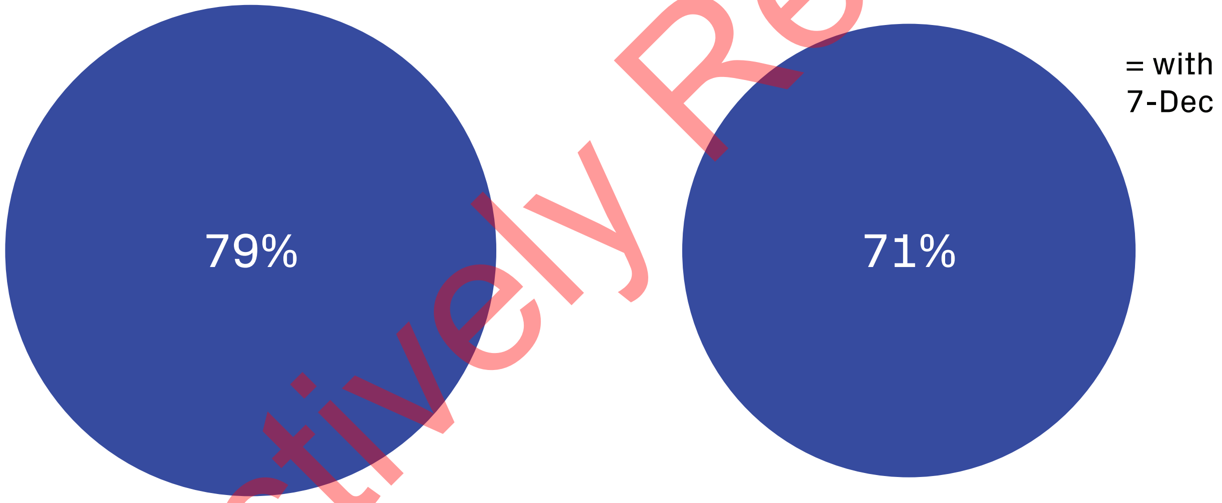


Source: 7 December pulse 2021, Behaviour and Sentiment Tracker November 2021
Q: How much do you agree with the following statements?
Base: 7 Dec pulse total sample n=411, Nov-21 total sample n=917

TRA

New Zealanders recognise that COVID-19 will spread throughout NZ, but believe health behaviours will keep us safe

AGREEMENT WITH KEY STATEMENTS - NOVEMBER



Agree that COVID-19 will spread through the community in the coming months

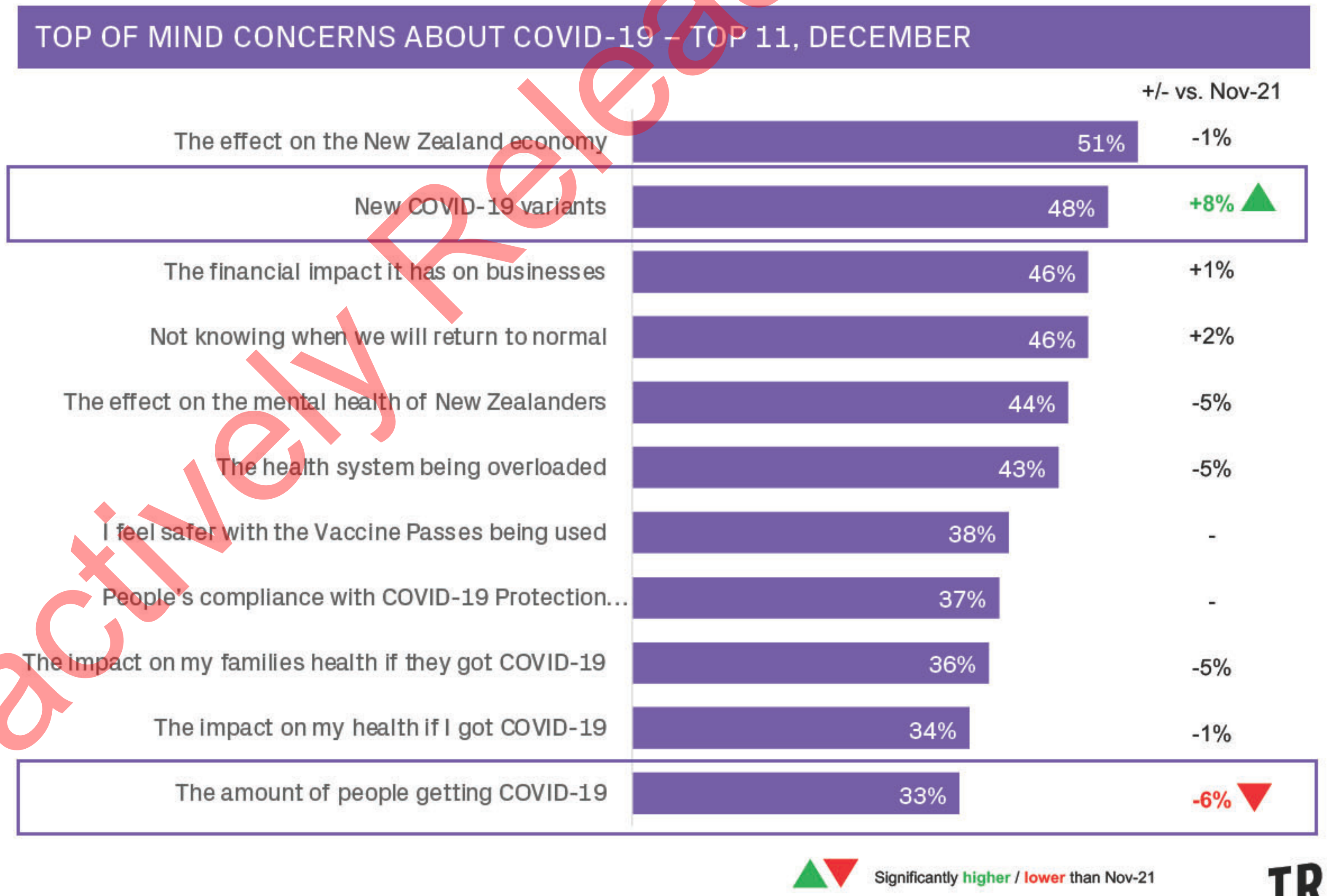
Agree that compulsory health behaviours will keep us safe

Source: 7 December Pulse 2021 & Behaviour and Sentiment Tracker November 2021
Q: How much do you agree with the following statements?
Key: Agree that compulsory health behaviors will keep us safe – Nov = Compulsory health behaviours (i.e. scanning, wearing a face coverings) will keep us safe,
Dec = Compulsory health behaviours (i.e. using a vaccine pass, scanning, wearing face coverings) will help keep us safe
Base: 7-Dec Pulse total sample n=408, Nov-21 total sample n=917

Top concerns are still about the economy, but we see an increase in concern about new COVID-19 variants

With the emergence of the Omicron variant, we see a significant increase in concerns about new COVID-19 variants from November levels. This has moved up **5 places in rank** since November.

With lower case numbers recently, we are seeing concern with the amount of people getting COVID-19 decline.



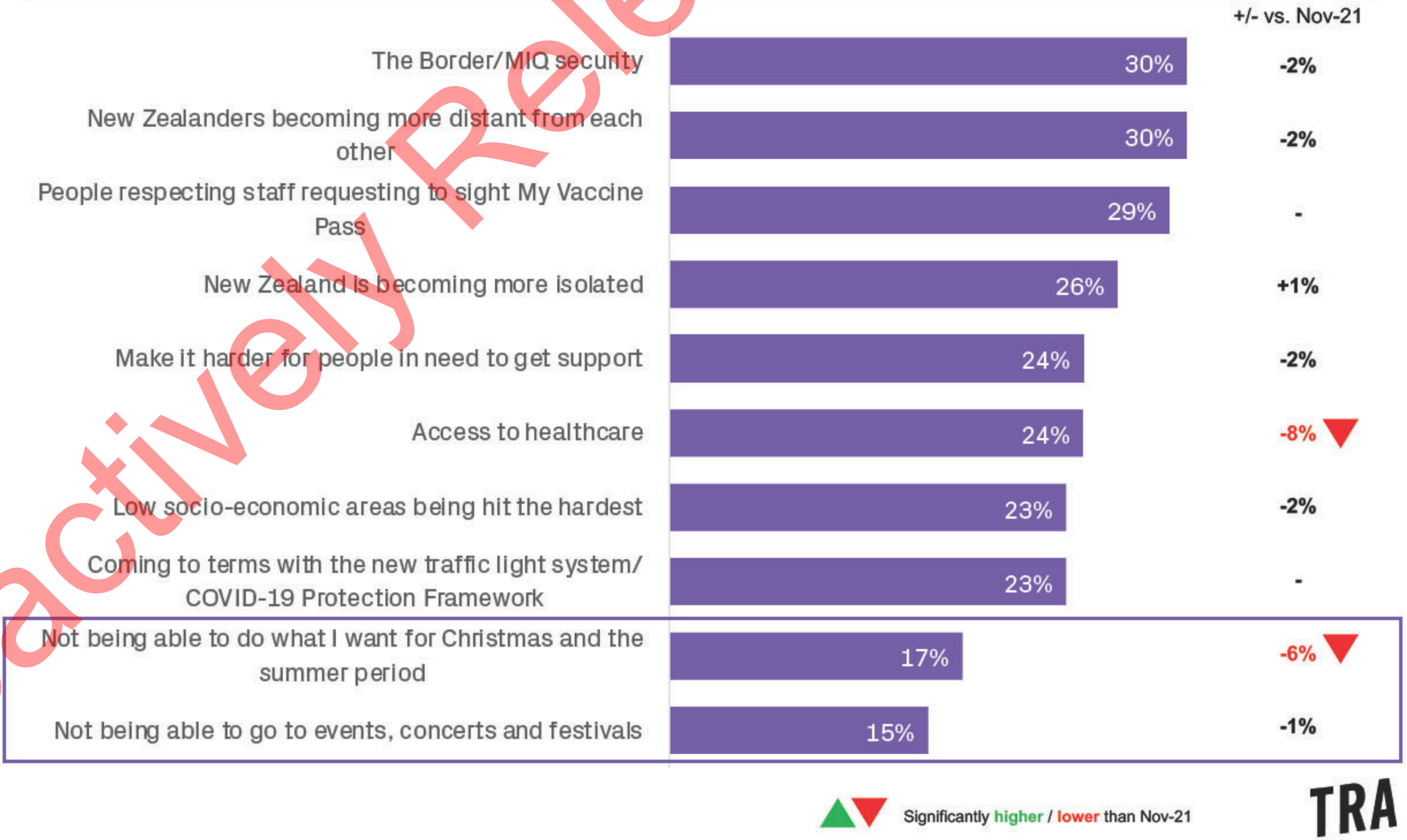
Source: 7 December pulse 2021, Behaviour and Sentiment Tracker November 2021
Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
Base: 7 Dec pulse total sample n=411, Nov-21 total sample n=917

TRA

Moving into the Framework has provided some reassurance of Christmas plans, although almost 1 in 5 are still concerned these will be impacted

Since moving to the new COVID-19 Protection Framework, we also see a decrease in concerns about access to healthcare.

TOP OF MIND CONCERNS ABOUT COVID-19 – BOTTOM 11, DECEMBER



Source: 7 December pulse 2021, Behaviour and Sentiment Tracker November 2021
Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
Base: 7 Dec pulse total sample n=411, Nov-21 total sample n=917

IMPLICATION

Before experiencing the Framework there was a large amount of uncertainty and confusion among New Zealanders.

Now after living in the Framework, people are starting to feel more comfortable, and sentiment is increasing.

But there are still concerns that need to be addressed such as new COVID-19 variants, and the economy is still top of mind for half of New Zealanders.

Compulsory health behaviours are a key reassurance message in keeping New Zealanders safe.

TRA

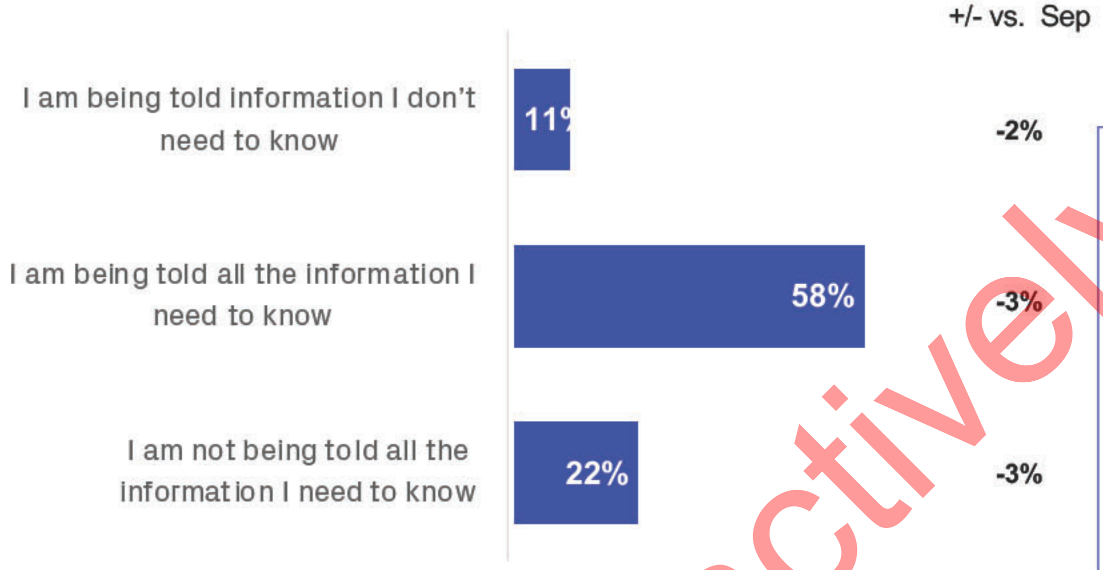
Information access and needs

2

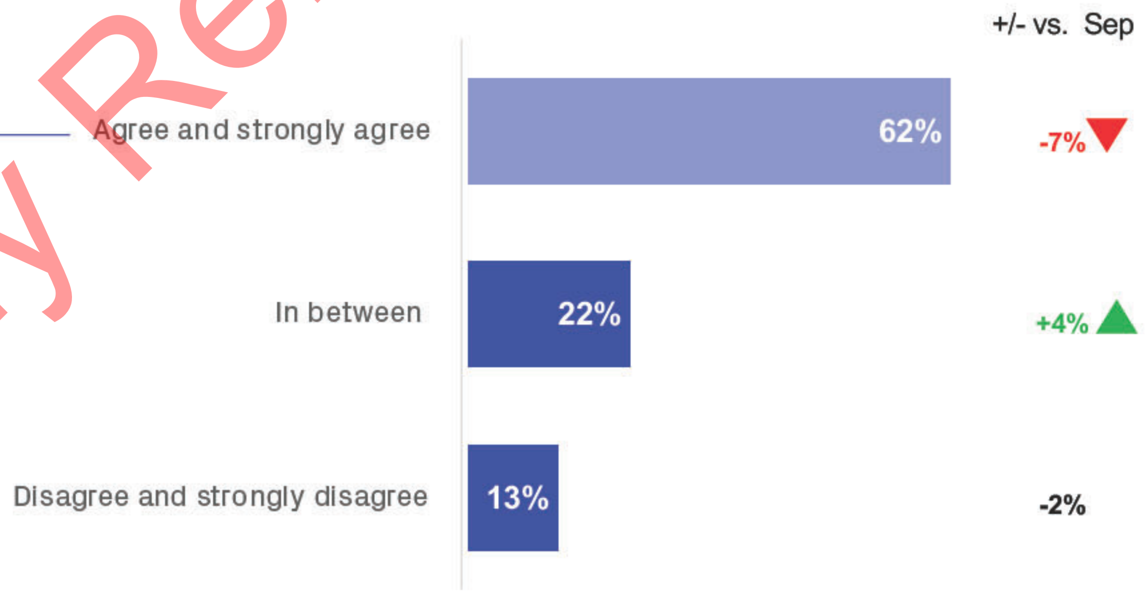
TRA

Information needs are being met for the majority, but access has declined slightly since September levels

INFORMATION QUALITY - NOVEMBER



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



But this has recorrected in December (66%) indicating again people feel more confident and have the information they need.

Source: Behaviour and Sentiment Tracker September 2021, November 2021
Q: How do you feel about the quality of information about COVID-19 that is currently being provided on what you need to do?
Q: From everything you've seen or heard about COVID-19 do you agree that you have access to all the information you want and need?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

Significantly higher / lower than Sep-21

TRA

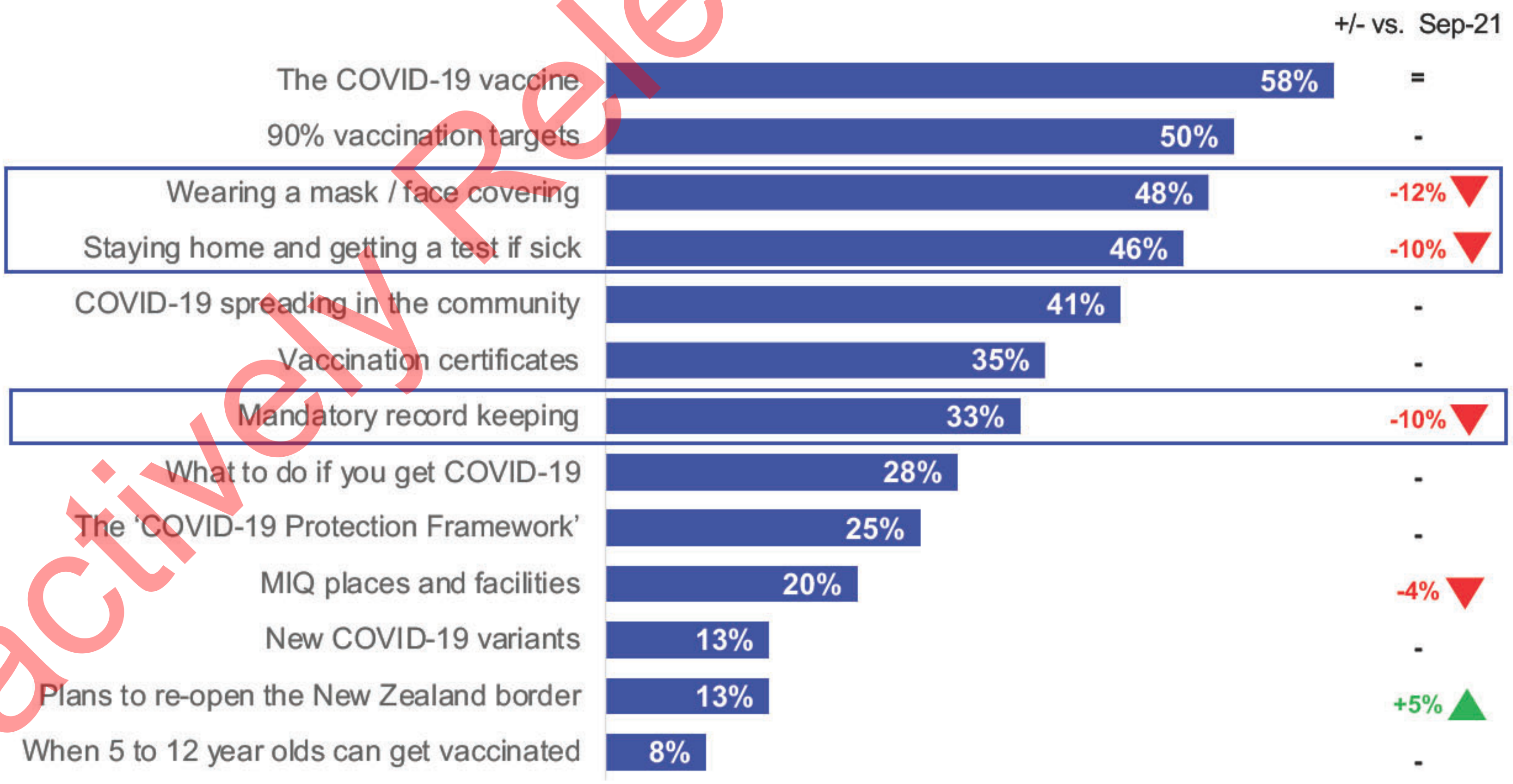
Top messages seen are about the COVID-19 vaccine and COVID-19 health behaviours

Since September, we have seen a significant decline in the visibility of health behaviour messages such as wearing a mask, staying home and getting a test if sick, scanning and record keeping.

After the Nov-17 announcement, there is a significant increase in visibility for the messages around:

- Vaccination certificates (37%, +8% pre).
- The 'COVID-19 Protection Framework' (27%, +9% pre).

TOP MESSAGES – SEE OR HEAR ABOUT IT ALL THE TIME - NOVEMBER



Source: Behaviour and Sentiment Tracker September 2021, November 2021
Q: Lately, how much are you seeing or hearing about … (See or hear about it all the time)
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

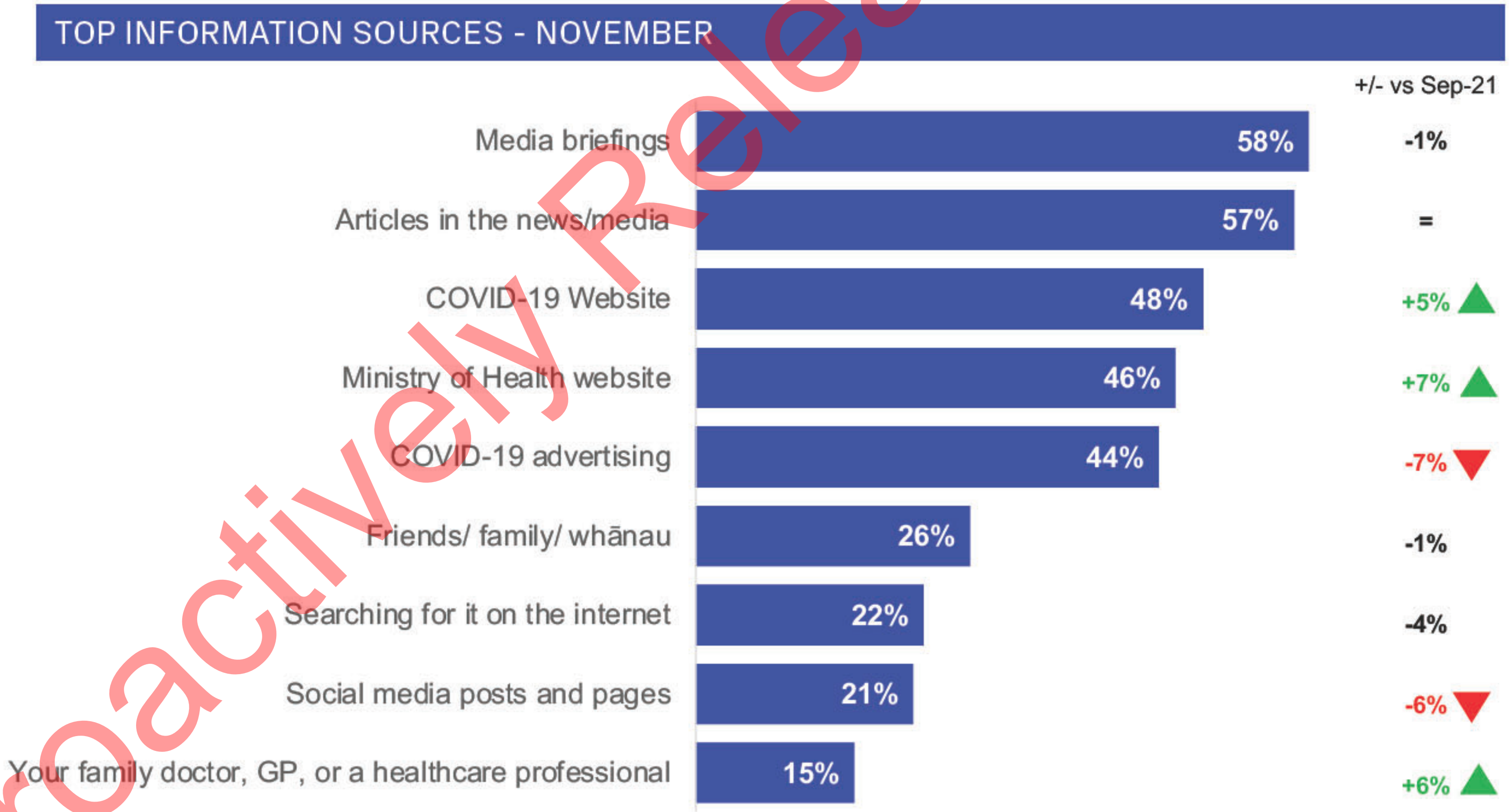
Significantly higher / lower than Sep-21

TRA

We have seen an increase in use of 'pull' channels, with New Zealanders actively seeking out health-oriented information

We have seen a significant increase in use of the COVID-19 or Ministry of Health website, and doctors, GP's or healthcare professionals.

Simultaneously, we have seen a significant decline in some passive channels such as COVID-19 advertising and social media.



Source: Behaviour and Sentiment Tracker November 2021, September 2021
Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, restrictions, the COVID-19 vaccine etc.?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

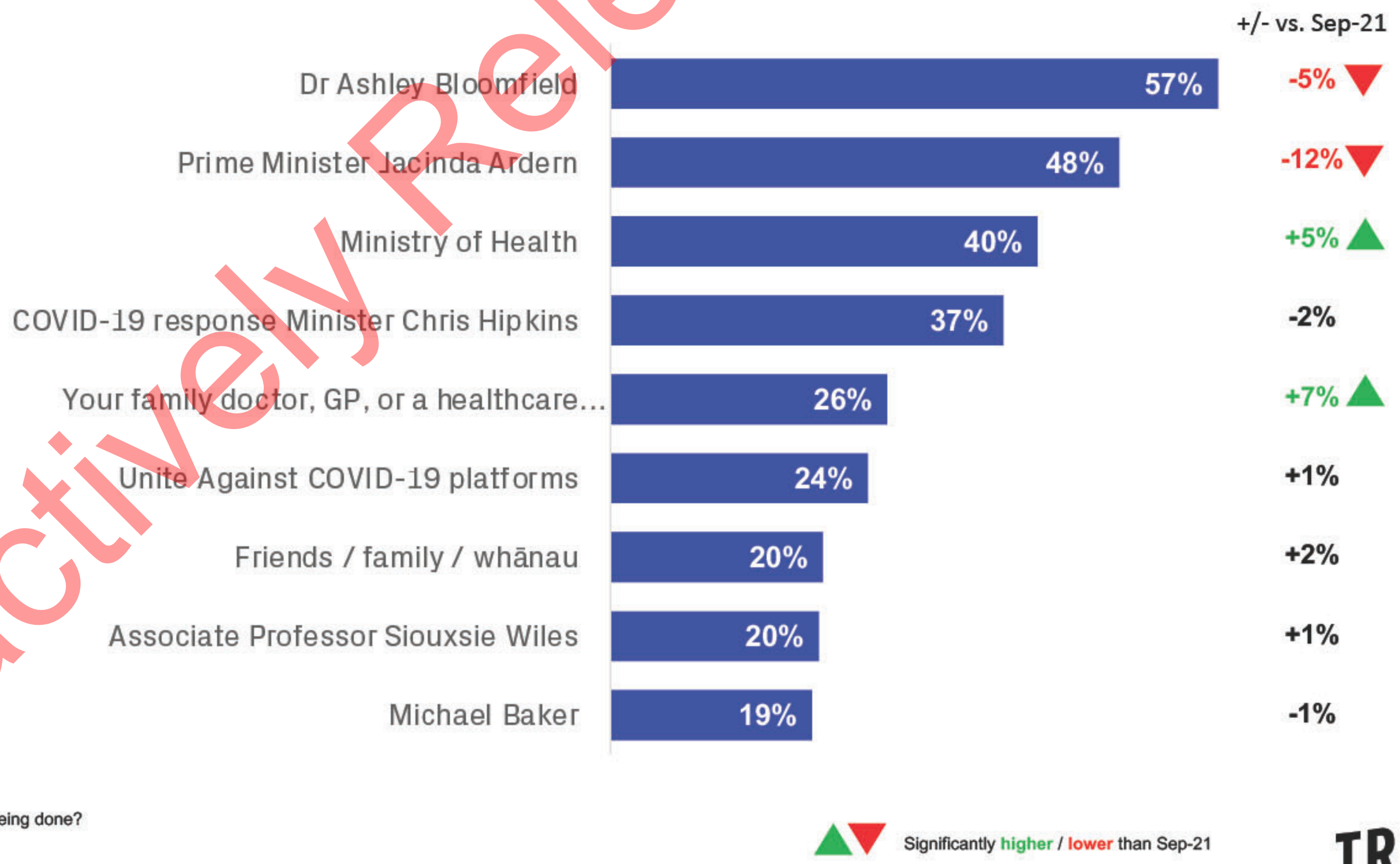
Significantly higher / lower than Sep-21

TRA

This is reinforced by an increase in people turning to Ministry of Health and family doctors / GPs for information

Our top influencers are consistent along experienced a significant decline since September – Ashleigh Bloomfield, Jacinda Ardern and Ministry of Health.

COVID-19 INFLUENCERS - NOVEMBER



Source: Behaviour and Sentiment Tracker November 2021, September 2021
Q: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

TRA

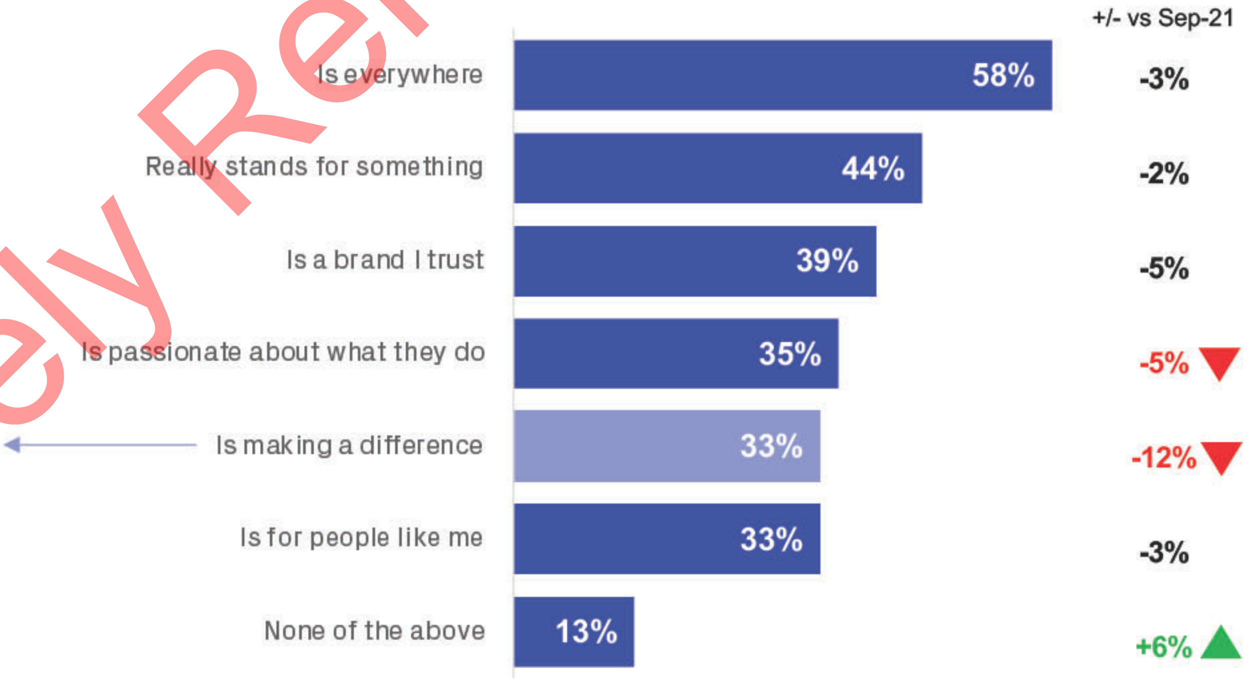
The 'Unite Against COVID-19' brand has seen some softening since September

In September we had seen significant increase in 'is making a difference'. In November we saw this significantly decline to below July levels.

Compared to September, this decline has come from middle income households (25%, -9% Sep) and South Islanders outside of Canterbury (11%, -9% Sep).

'IS MAKING A DIFFERENCE' – OVER TIME

ASSOCIATIONS WITH THE 'UNITE AGAINST COVID-19' BRAND - NOVEMBER



Source: Behaviour and Sentiment Tracker November 2021, September 2021
Q: Do you feel that Unite Against COVID-19...?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

Significantly higher / lower than previous wave

TRA

IMPLICATION

In November, New Zealanders were grasping with the shift from an elimination strategy to a suppression strategy.

As a result, New Zealanders were actively seeking out health-oriented information.

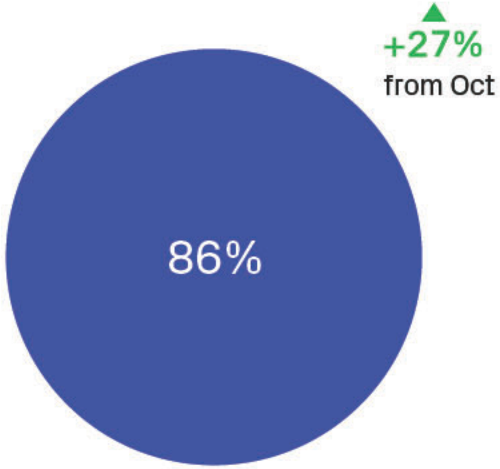
Top messages noticed were about the COVID-19 vaccine and compulsory health behaviours, with an increase in visibility for vaccine certificates and The 'COVID-19 Protection Framework' following the November 17 announcement.

The need for information is to continue to reassure people during this transition.

COVID-19 Protection Framework

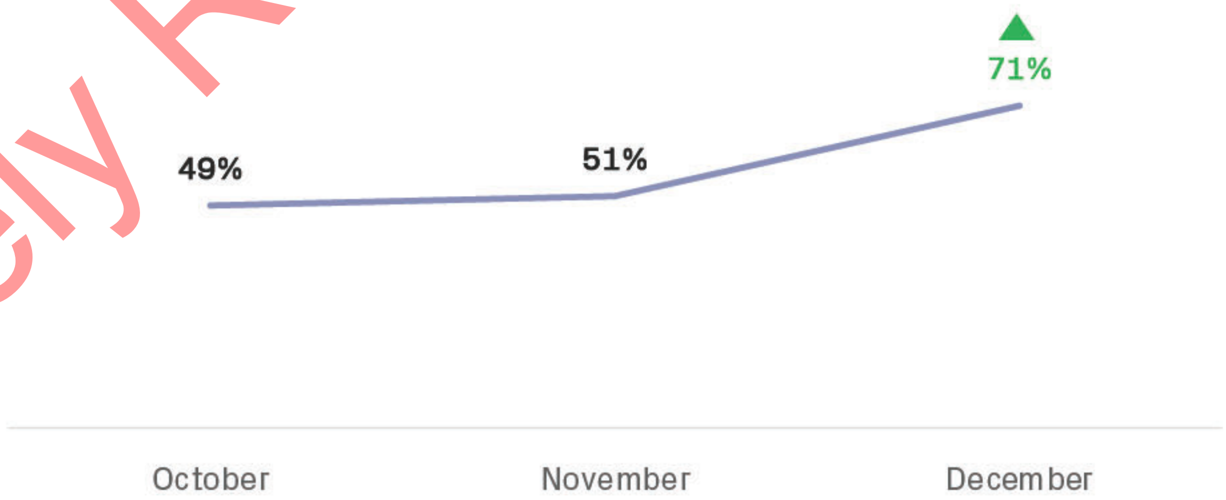
In November, awareness of the Framework increased, and following into December understanding has also increased

The Framework was more difficult to understand while it was more abstract, but even after only a short time living with the Framework, understanding has increased drastically.



Were aware of the Framework in November

THOSE WHO UNDERSTAND THE FRAMEWORK 'WELL' OR 'VERY WELL'

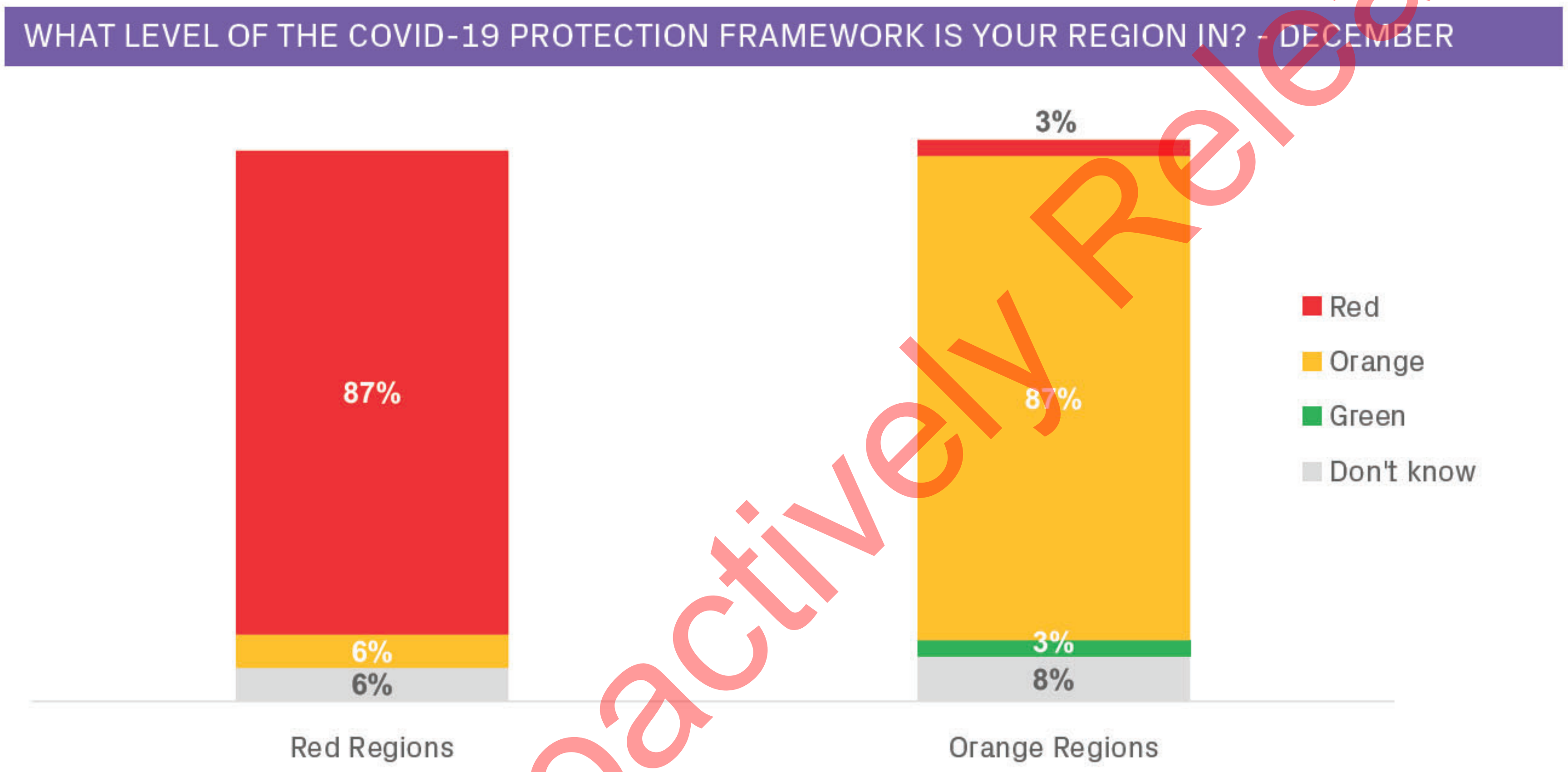


Source: Behaviour & Sentiment Tracker November 2021, October COVID-19 Protection Framework Pulse
Q: Are you aware of the new 'COVID-19 Protection Framework' (traffic light system) for managing COVID-19?
Q: Overall, how well do you feel you understand the new 'COVID-19 Protection Framework' (traffic light system)?
Base: Nov-21 total sample n=917, Oct-21 total sample n=409

Significantly higher / lower than previous wave

TRA

Most New Zealanders know which setting their region is currently in



Source: 7-December Pulse 2021
Q: What level of the new 'COVID-19 Protection Framework' (traffic light system) is your region currently in?
Base: 7-Dec Pulse total sample n=411

The November 17 announcement helped to drive awareness of key components

After the November 17 announcement, the Framework became more relevant and more visible (27% 'see or hear about it all the time' post announcement v 18% pre-announcement).

This led to a significant increase in awareness of key components of the Framework after the announcement.

	Pre- 17 Nov announcement	Post - 17 No- announcement
90% of the eligible population in each DHB needs to be vaccinated to move to the new 'COVID-19 Protection Framework'	66%	65%
Different rules for vaccinated and unvaccinated	54%	63% ▲
We will need to continue some level of health behaviours like mask wearing and scanning at every level	51%	59% ▲
Different parts of the country might be in different traffic light levels	48%	57% ▲
What level we're at will depend on vaccination levels	39%	48% ▲
Vaccination certificates will be optional in some places but will be required in some	42%	47%
Some places will be able to have more people if they require vaccination certificates	42%	44%
What level we're at will depend on the amount of community transmission	40%	41%
There may still be a need for localised lockdowns (similar to current Alert Level 3 or 4)	38%	40%
What level we're at will depend on the pressure on the healthcare system	28%	29%
AVERAGE NUMBER OF COMPONENTS AWARE OF	4.5	4.9

Source: Behaviour & Sentiment Tracker November 2021
Q: What do you think is part of the new 'COVID-19 Protection Framework' (traffic light system)?
Base: Nov-21 total sample n=917

Significantly higher / lower than pre-announcement

TRA

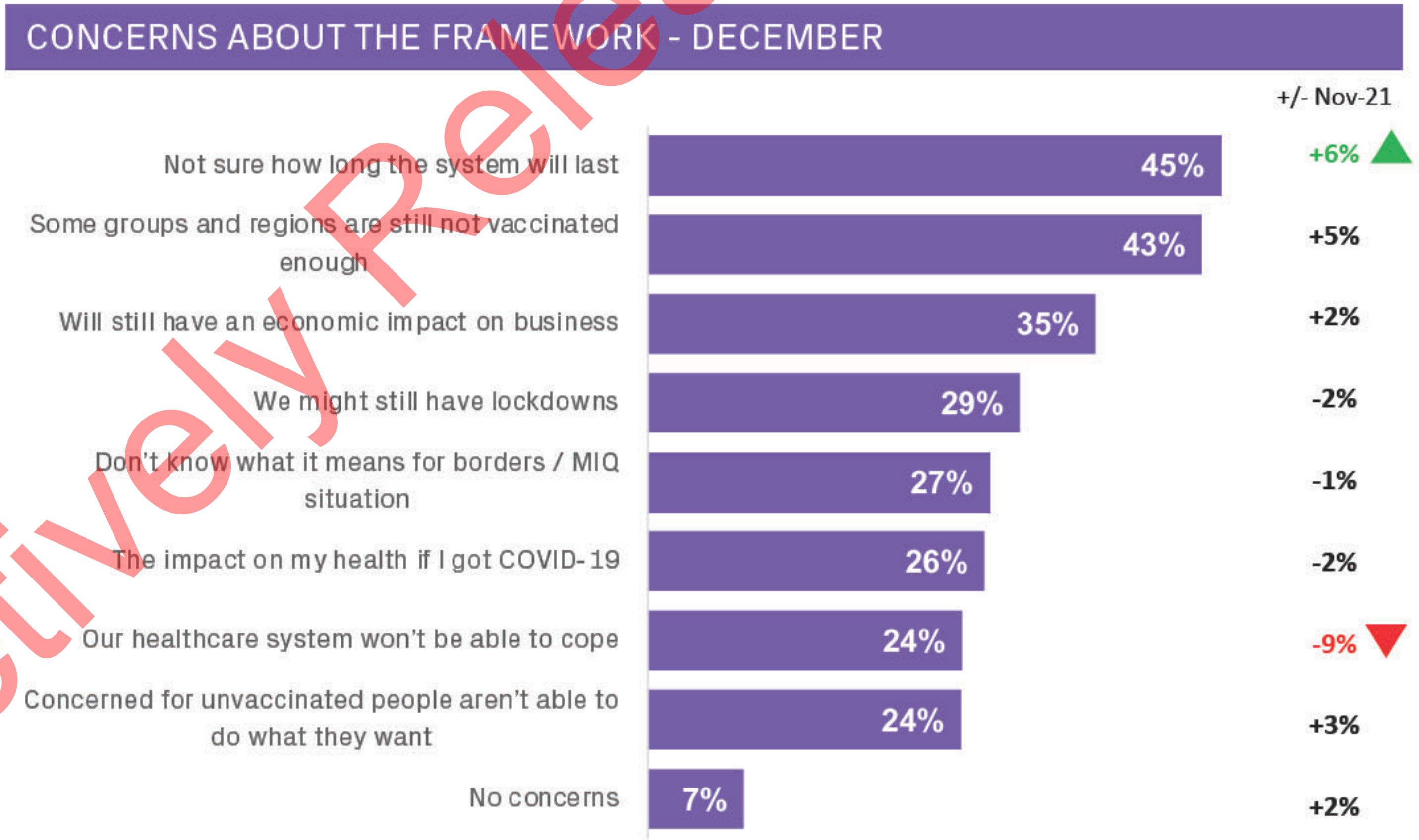
But there are still concerns about the Framework, particularly how long it will last

And only

50%

Agree that the COVID-19 Protection Framework provides more certainty and keeps us safe

New Zealanders are feeling less concerned with the healthcare system compared to November levels. Lower daily case numbers may have reassured New Zealanders that there will not be an explosion of cases.



Source: 7-December 2021 Pulse & Behaviour & Sentiment Tracker November 2021
Q: Do you have any concerns about the new 'COVID-19 Protection Framework' (traffic light system)?
Q: Here are some things other people have said. To what extent do you agree or disagree?
Base: 7-Dec Pulse total sample n=411, Nov-21 total sample n=917

▲▼ Significantly higher / lower than Nov-21

TRA

IMPLICATION

As we begin to live with the COVID-19 Protection Framework levels of familiarity and understanding of the framework are increasing.

Though there are still concerns about how long the system will last, with only half of New Zealanders agreeing that the framework provides more certainty and keeps us safe.

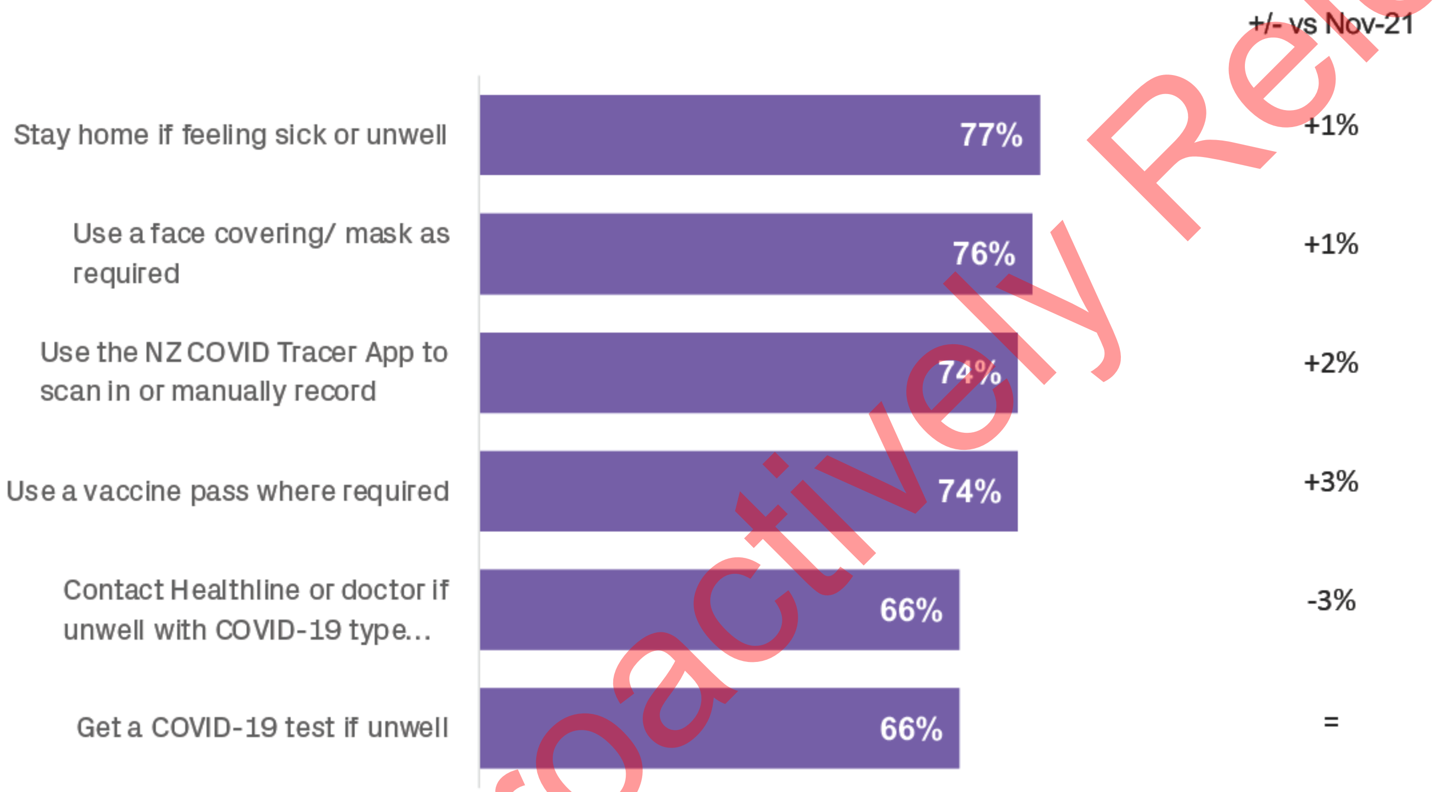
3

Behaviour & compliance

TRA

Willingness to comply with key guidelines has remained high and is stable

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



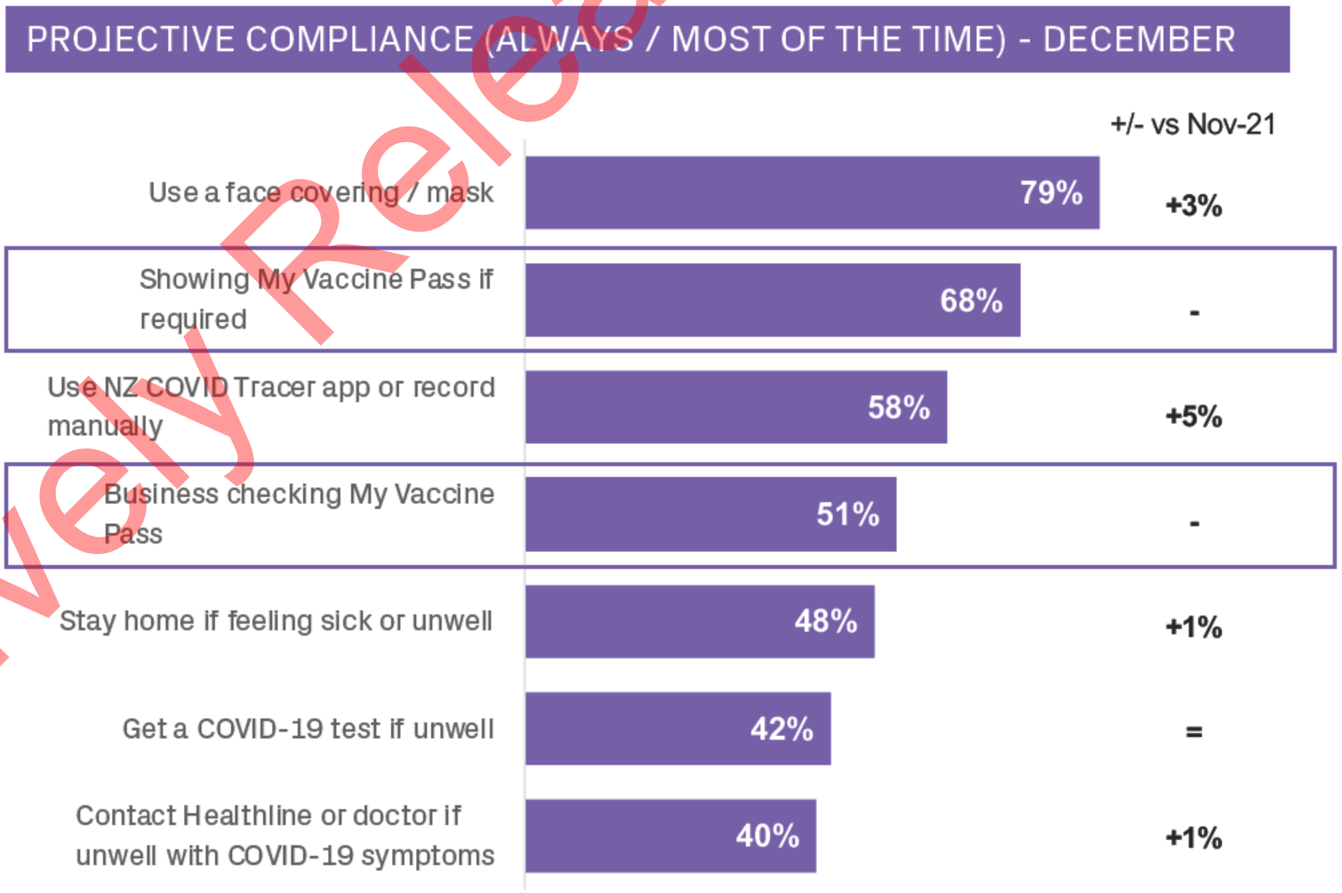
Source: 7 December Pulse 2021 & Behaviour and Sentiment Tracker November 2021
Q: How willing are you to do the following? (Very willing, happy to comply)
Base: 7 Dec Pulse total sample n=411, Nov-21 total sample n=917

TRA

And compliance has remained stable

The significant declines we saw in November for staying home and getting a test if sick and getting a COVID-19 test if unwell have held in December.

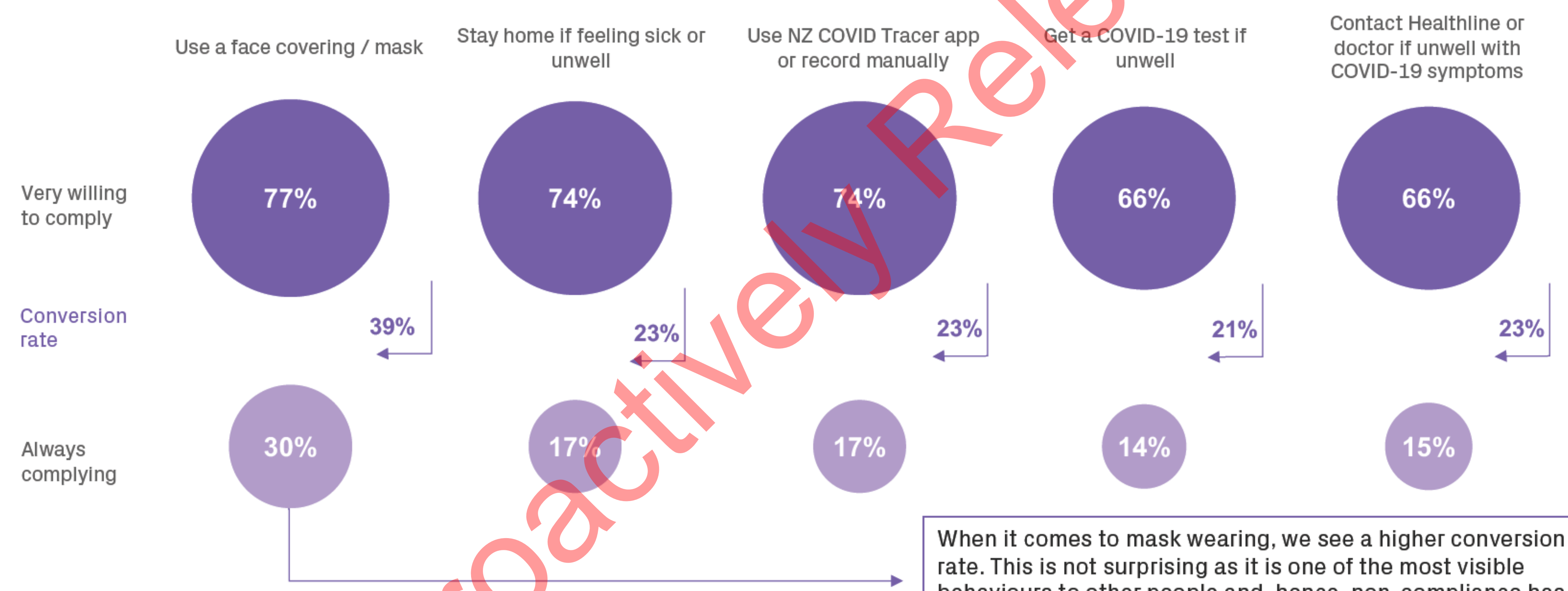
Results are more positive for ‘showing My Vaccine Pass if required’ (68%) than ‘business checking My Vaccine Pass’ (51%), suggesting further encouragement may be required for businesses to enforce this behaviour.



Source: 7 December Pulse 2021 & Behaviour and Sentiment Tracker November 2021
Q: How often do you think other New Zealanders do the following? (Always + Most of the time)
Base: 7 Dec Pulse total sample n=411, Nov-21 total sample n=917

There remains a disconnect between willingness to comply and real consistent compliance

WILLING TO COMPLY & PROJECTIVE COMPLIANCE 'ALWAYS' – DECEMBER



When it comes to mask wearing, we see a higher conversion rate. This is not surprising as it is one of the most visible behaviours to other people and, hence, non-compliance has a more extreme social cost.

Source: 7 December Pulse 2021
Q: How often do you think other New Zealanders do the following? (Always)
Q: How willing are you to do the following? (Very willing, happy to comply)
Base: 7 Dec Pulse total sample n=411

IMPLICATION

Despite a high level of willingness to comply with health behaviours, the disconnect between willingness to comply and real consistent compliance remains.

We know that wearing a mask has the highest conversion rate from willingness to actual compliance because of the visibility aspect- what is the social cost for lack of compliance with non-visible health behaviours? And how do we leverage these to increase actual compliance?

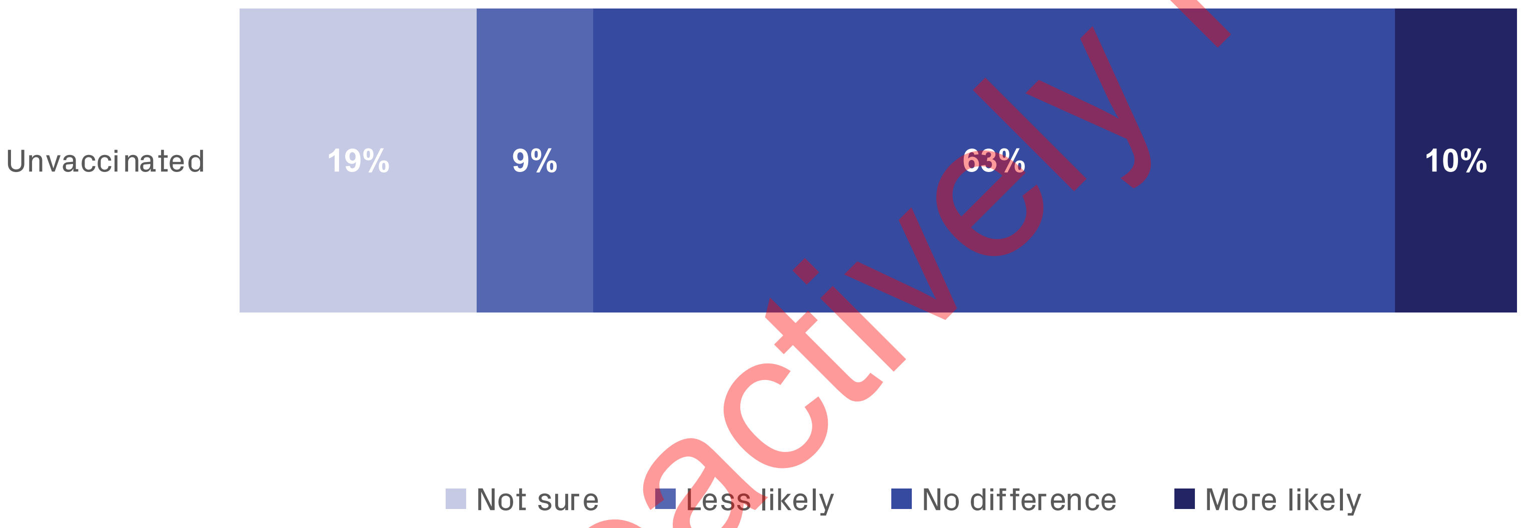
Vaccine

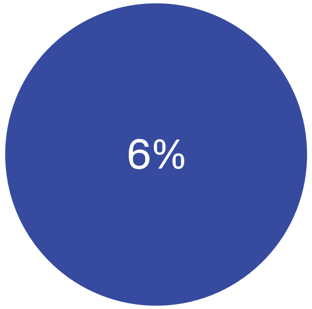
4

TRA

The COVID-19 Protection Framework is shifting some Unvaccinated to get the COVID-19 vaccine

LIKELIHOOD TO GET VACCINATED AS A RESULT OF THE COVID-19 PROTECTION FRAMEWORK - NOVEMBER





of the total sample claim to be unvaccinated.

Source: Behaviour & Sentiment Tracker November 2021
Q: As a result of the new COVID-19 Protection Framework (traffic light system), has your intention to get vaccinated changed?
Base: Nov-21 unvaccinated sample n=62

TRA

Over half of the Unvaccinated are weakly motivated, mostly protecting others, freedom and travel

Weakly Motivated – 4.5% of population

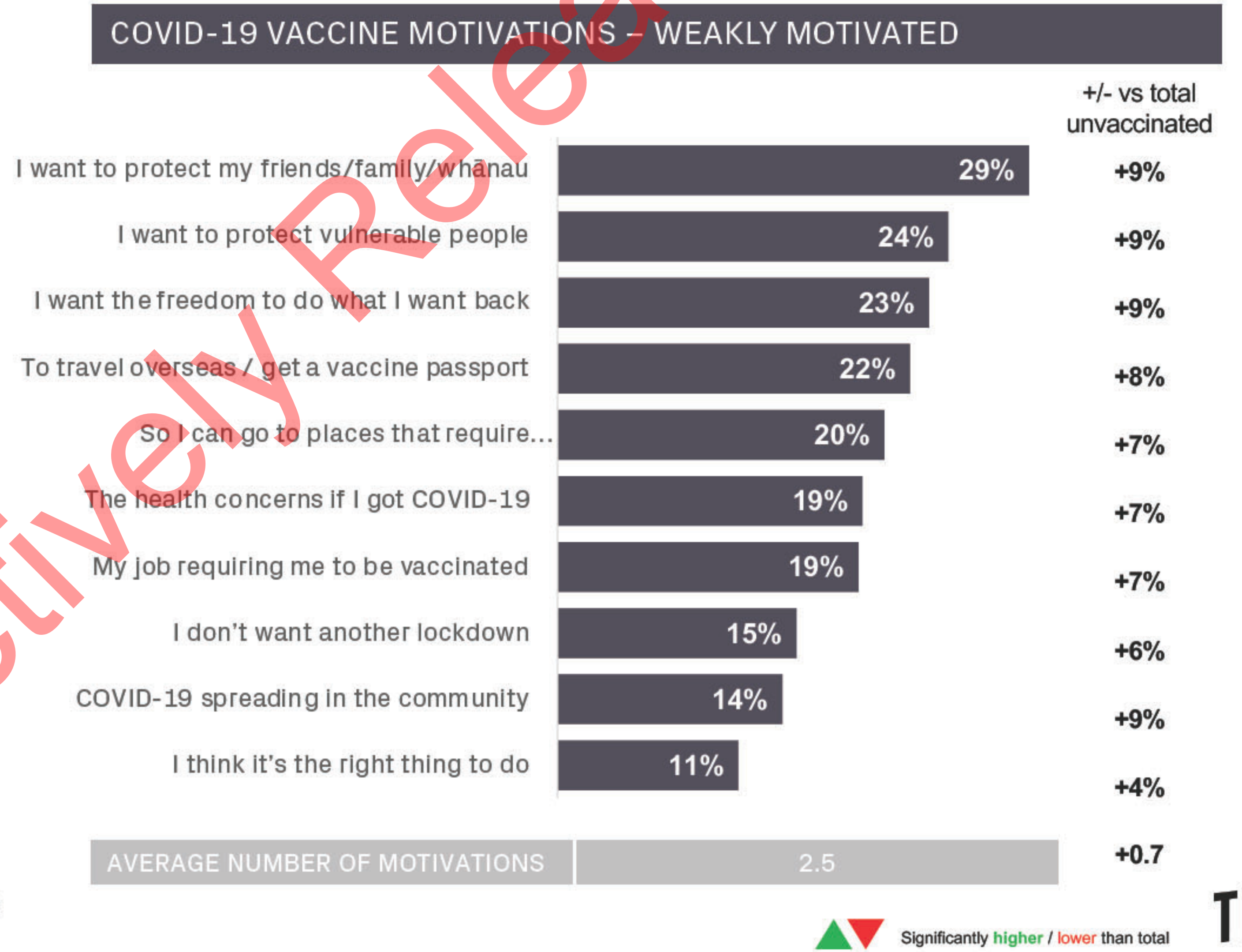
62%

Of the Unvaccinated are Weakly Motivated

They have at least one motivation to get vaccinated.

Compared to total sample, they are more likely to be:
- More likely to be unemployed (37%, +20% total)
- NZ Māori (35%, +21% total)

And less likely to be:
- Higher income (12%, -13% total)
- Students (0%, -6% total)



Source: Behaviour & Sentiment Tracker November 2021
Q: Which of the following are most likely to make you want to get the vaccine?
Base:, Nov- 21 Weakly motivated (have at least one motivation) n=41, total unvaccinated n=62

TRA

But there are still strong barriers for those who are weakly motivated

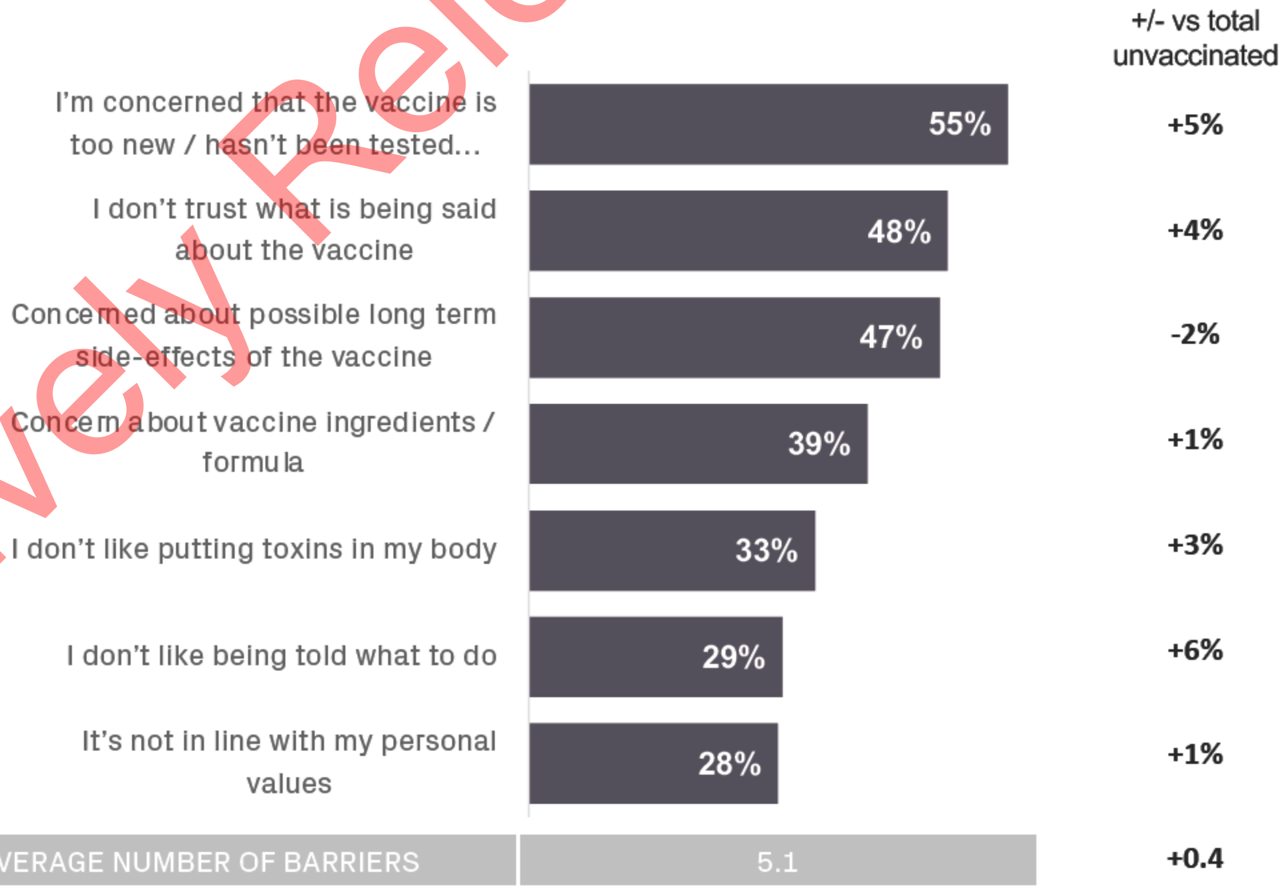
They're concerned about the safety of the vaccine and don't trust what is being said about it.

Weakly Motivated – 4.5% of population

On average, they have slightly more barriers than the total unvaccinated (5.1 vs. 4.7). Even though they are motivated, we will need to overcome these barriers to push them over the line.

Reassurance is key for this group – they need to be able to trust that the vaccine is safe and robust.

TOP COVID-19 VACCINE BARRIERS – WEAKLY MOTIVATED



Source: Behaviour & Sentiment Tracker November 2021
Q: What might stop you from getting the COVID-19 vaccine?
Base: Nov-21 Weakly motivated (have at least one motivation) n=41, total unvaccinated n=62

TRA

IMPLICATION

62% of the current Unvaccinated group are weakly motivated to get vaccinated.

Conversion will not be easy, as they still have strong barriers. To connect with this group, we should continue to leverage the key motivations they do have such as travel and freedom.

Appendix

TRA

GROUPS

Wrong direction (DECEMBER) – 26%

Demographically, they're more likely to be aged 55+years and NZ European/Pākehā compared to total sample.

They feel angry about the COVID-19 situation in New Zealand, are significantly more likely to be unvaccinated and do not understand the traffic light system well.

They are more likely to be concerned that unvaccinated people aren't able to do what they want under the new COVID-19 Protection Framework and that the new system will still have an economic impact on business.

They feel they are not being told all the information they need to know about COVID-19 and disagree they have access to all the information they want and need.

THE JOB TO DO:

This group needs more information about the new framework so they can improve their understanding.

They also need reassurance that the new framework will not have a terrible effect on the economy.

Their concern that unvaccinated people will be limited in what they can do under the new framework could be leveraged to encourage vaccinations or nudge them to revisit their vaccination decision.

TRA

GROUPS

Wrong direction (NOVEMBER) – 31%

Demographically, they're representative of New Zealanders, with no meaningful significant differences to total sample.

Anger is their dominant emotion about the COVID-19 situation, followed by sad. And they over index on strong agreeing **and strongly** disagreeing that restrictions should be stricter than they currently are.

They're more concerned about the impacts of COVID-19 overall. But less concerned about COVID-19 spreading in the community and misinformation.

They have lower perceived information access and quality compared to total but their messaging visibility is comparable. They're less likely to get information from, and be influenced by, government / healthcare sources and platforms. Only 16% trust the UAC brand.

Significantly more likely to be part of our Non-Compliant group (40%, v 28% total).

Lack of confidence in the plan – 8%

They are more likely to be 55y+ males and central dwellers.

They're angry about the COVID-19 situation and highly concerned about the impacts of COVID-19 on New Zealand, and re-opening the border.

They also have lower trust in the Unite Against COVID-19 brand, and are also less likely to feel it's 'making a difference' and 'really stands for something'.

Their information needs are not being met in general, and they don't feel they understand the COVID Protection Framework well.

THE JOB TO DO:

This group needs more information on the COVID-19 Protection Framework and how this will lessen the impact of COVID-19 on New Zealand.

How to read this report:

This report contains references to three key data sets.

- **Behaviour & Sentiment Tracker** – May (Benchmark), July, September, November waves.
    - For our November wave, where there are relevant significant differences we have split the sample depending on whether the respondent answered the survey before the November 17 announcement (Aucklanders being able to travel nationwide for Christmas) and after the November 17 announcement.
- **22 October Pulse** – launched directly after the COVID-19 Protection Framework was initially announced to measure understanding of the Framework.
- 7 December Pulse – for an updated read on sentiment, behaviour, and understanding of the COVID-19 Protection Framework.

For simplicity, the **November Behaviour & Sentiment Tracker data will be shown in blue** throughout the report,

And the 7-Dec Pulse will be shown in purple.

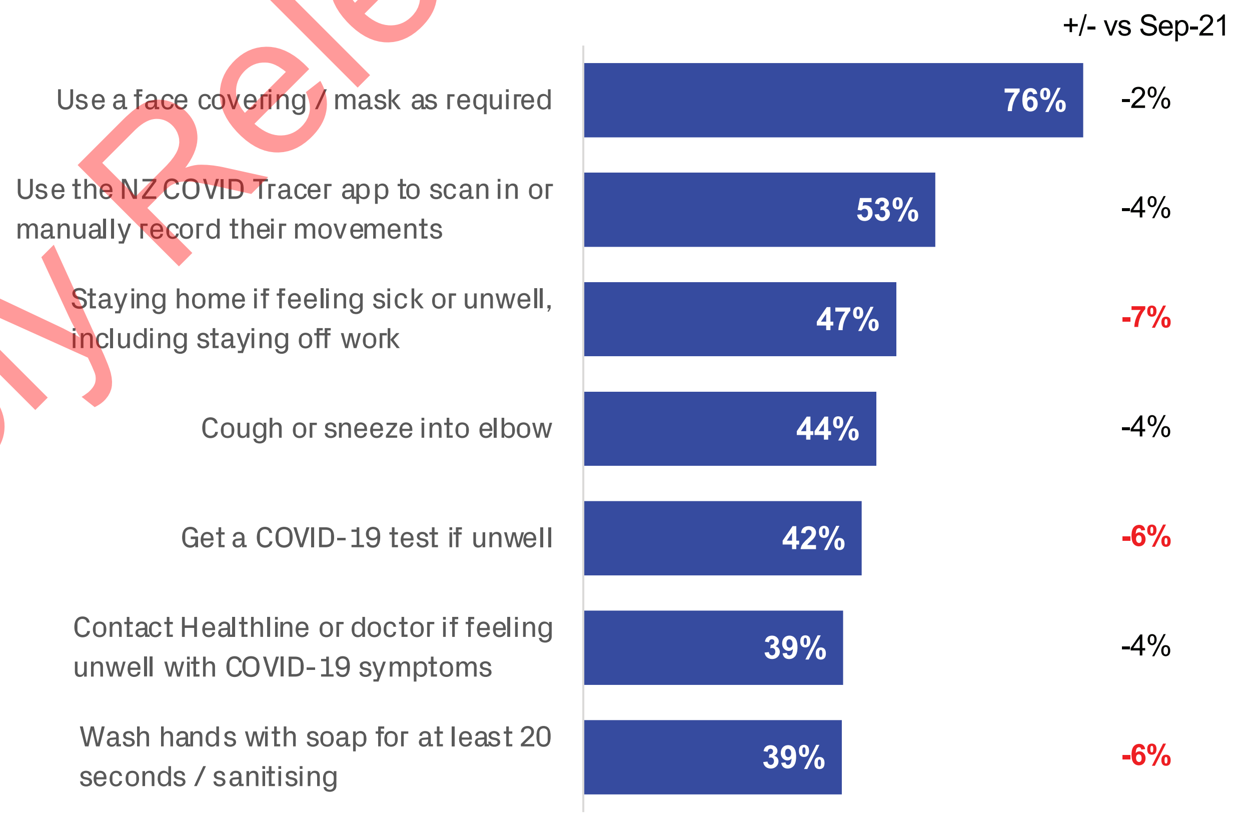
Chart titles will also denote which dataset has been used.

In terms of actual compliance, we saw a decline in compliance with some health behaviors in November

Compliance with our more involved health behaviours declined from September levels, where we saw large significant increases in compliance across the board.

As fear of COVID-19 started to subside we see more involved behaviours significantly decline towards July levels.

PROJECTIVE COMPLIANCE (ALWAYS / MOST OF THE TIME) - NOVEMBER



Source: Behaviour & Sentiment Tracker November 2021 & September 2021
Q: How often do you think other New Zealanders do the following? (Always + Most of the time)
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

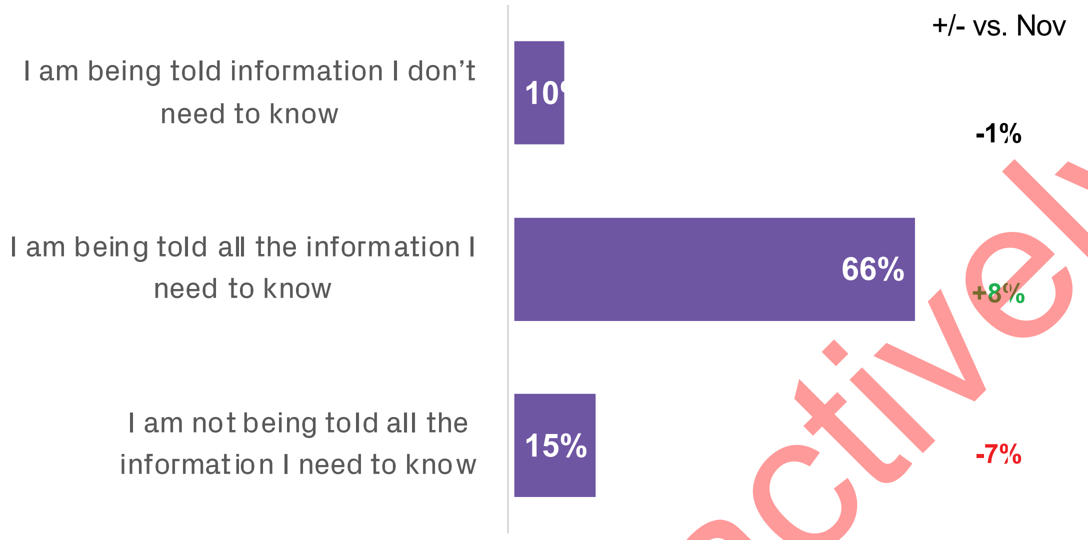
Significantly higher / lower than Oct-21

TRA

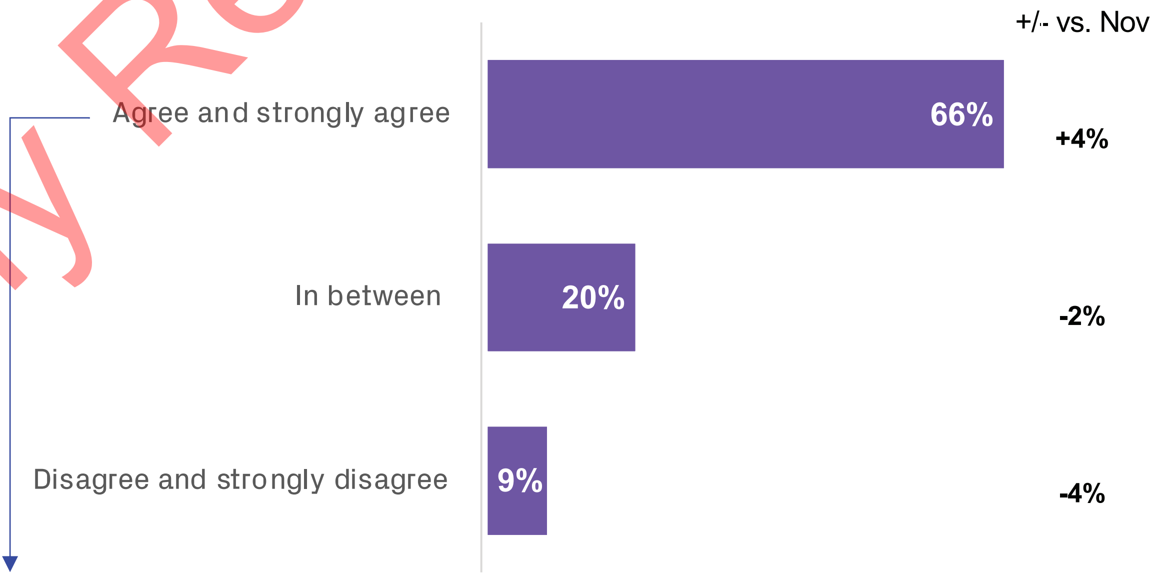
Majority of New Zealanders feel they have high quality information and have access to the right information

And we have seen a significant increase from November in those that feel they're being told 'all the information I need to know'.

INFORMATION QUALITY - DECEMBER



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

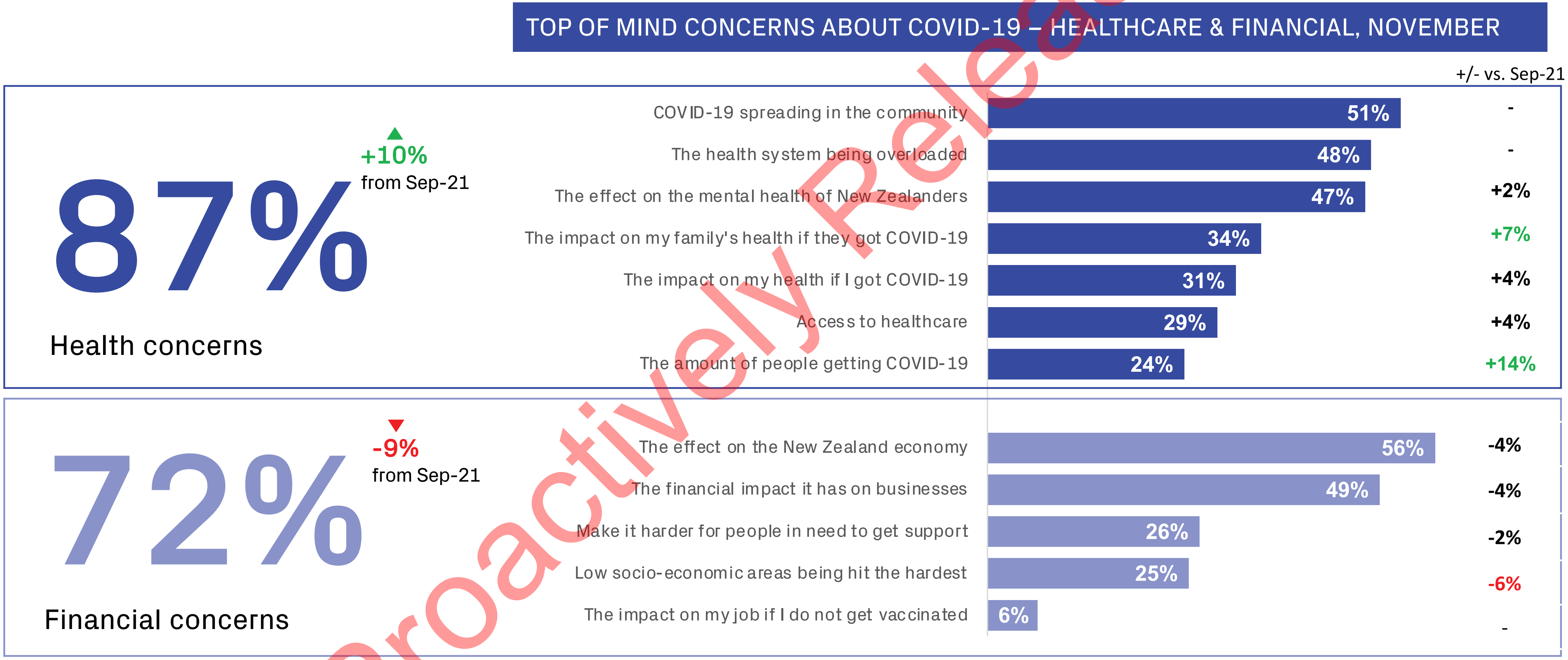


In November we had seen information access **decline significantly from September levels** (62%, -7% Sep). This was amongst Aucklanders (11% Nov, -5% Nov), and South Islanders (10%, -7%). But this has recorrected in December.

Source: 7 December 2021 Pulse , Behaviour & Sentiment Tracker September 2021, November 2021
Q: How do you feel about the quality of information about COVID-19 that is currently being provided on what you need to do?
Q: From everything you've seen or heard about COVID-19 do you agree that you have access to all the information you want and need?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846, 7-Dec Pulse n=411

Significantly higher / lower than Nov-21

In November, with the realisation that COVID-19 will spread throughout NZ, we saw an increase in health-oriented concerns



Source: Behaviour & Sentiment Tracker November 2021, October pulse 2021
Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
Base: Nov-21 total sample n=917, Oct-21 total sample n=409
Net Health concerns: the effect on the mental health of New Zealanders, the amount of people getting COVID-19, access to healthcare, impact on my health if I got COVID-19, impact on my family's health if they got COVID-19, the health system being overloaded, COVID-19 spreading in the community.
NET financial concerns: effect on the NZ economy, low socio-economic areas being hit the hardest, the financial impact it has on businesses, make it harder for people in need to get support, the impact on my job if I do not get vaccinated.

Feelings of heading in the 'wrong direction' have been consistently driven by a lack of support of the approach

Feelings of a 'lack of confidence in the plan' have subsided since November, and instead those who think we're heading in the 'wrong direction' believe the country is becoming divided.

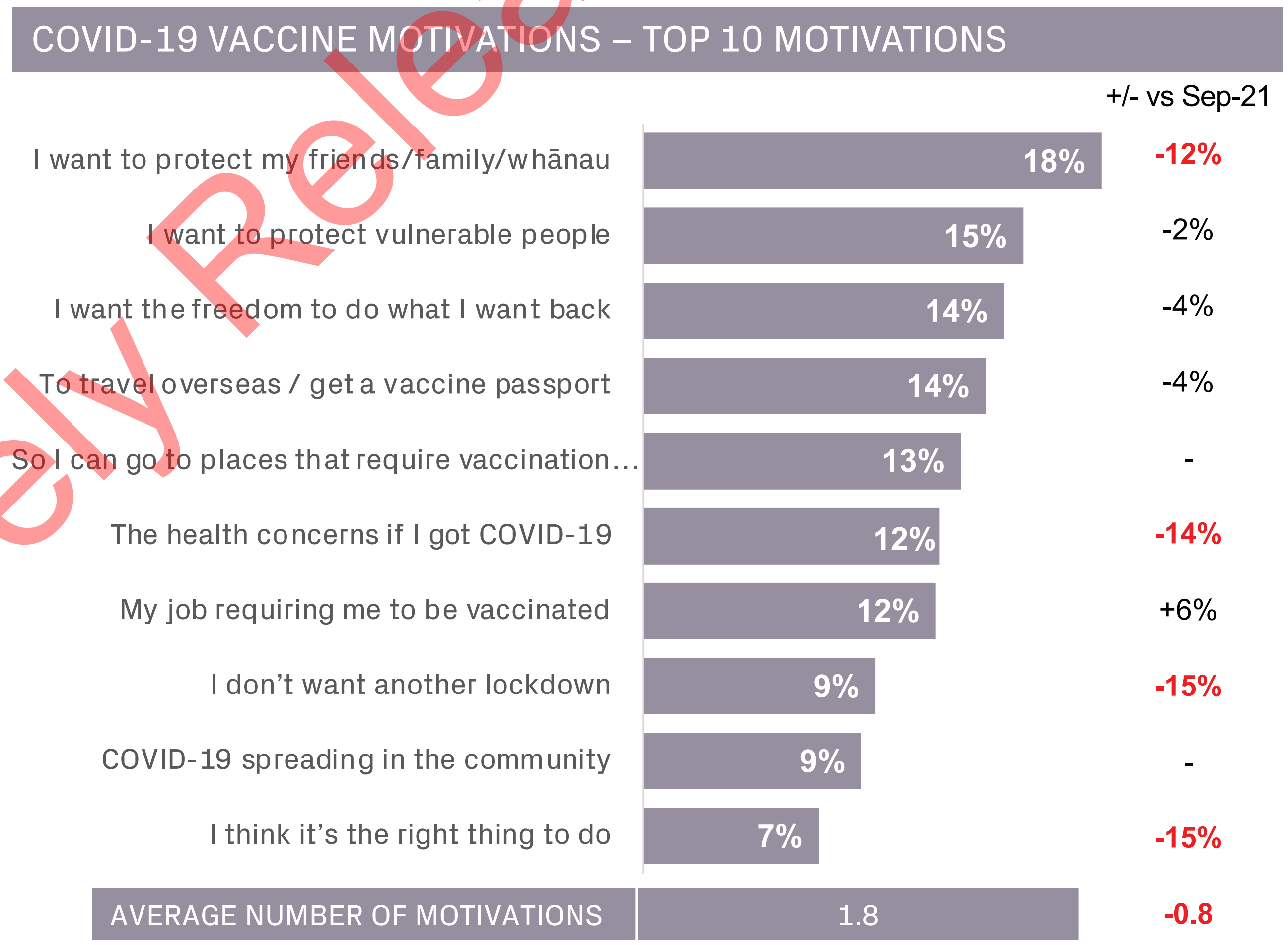
NOVEMBER		DECEMBER	
Unsupportive of the approach	**Lack of confidence in 'the plan'**	**Unsupportive of the approach**	**Country is divided**
"There has been a total mishandling this year." *"The vaccine rollout was too slow pre-Delta. Vaccine passports should have been ready months ago."* *"Money wasted on lockdown should have been used to prepare hospitals."* *"Other countries are back to normal."*	*"[They're] bumbling and [the approach] lacks firm direction."* *"No consistent plans."* *"Going in circles. Rules changing daily."* *"There's no clear direction."* *"The country is lost and confused and frustrated."*	*"Mismanagement of MIQ & long lockdown in NZ"* *"Wherever COVID-19 is prevalent in the country, lock it down. Close the borders completely to stop any new variants getting into the country"* *"Should have gone to orange for the whole country. If areas are not vaccinated that is their problem"* *"We are still letting in people that are testing positive early In their stay, it was safer when our borders were closed"*	*"Segregation isn't the answer"* *"The Covid pass is discriminatory"* *"So many rules now and it's making it a very divisive place to be"* *"Because New Zealand is turning into an apartheid state"* *"They are getting rid of freedom"* *"Vaccine mandates have divided us and show how unkind people can be"*

Source: Behaviour & Sentiment Tracker November 2021
Q: And why is that?
Base: Nov-21 total sample n=917

At a total level, we have seen a decline in motivations to get vaccinated

Unvaccinated – 6%

As our Unvaccinated group continues to shrink the most motivated leave the group. The average number of motivations for the Unvaccinated is 1.8, compared to 2.6 in September.



Source: Behaviour & Sentiment Tracker November 2021 & September 2021
Q: Which of the following are most likely to make you want to get the vaccine?
Base: Nov-21 unvaccinated sample n=62, Sep-21 unvaccinated sample n=253, Weakly motivated (have at least one motivation) n=49

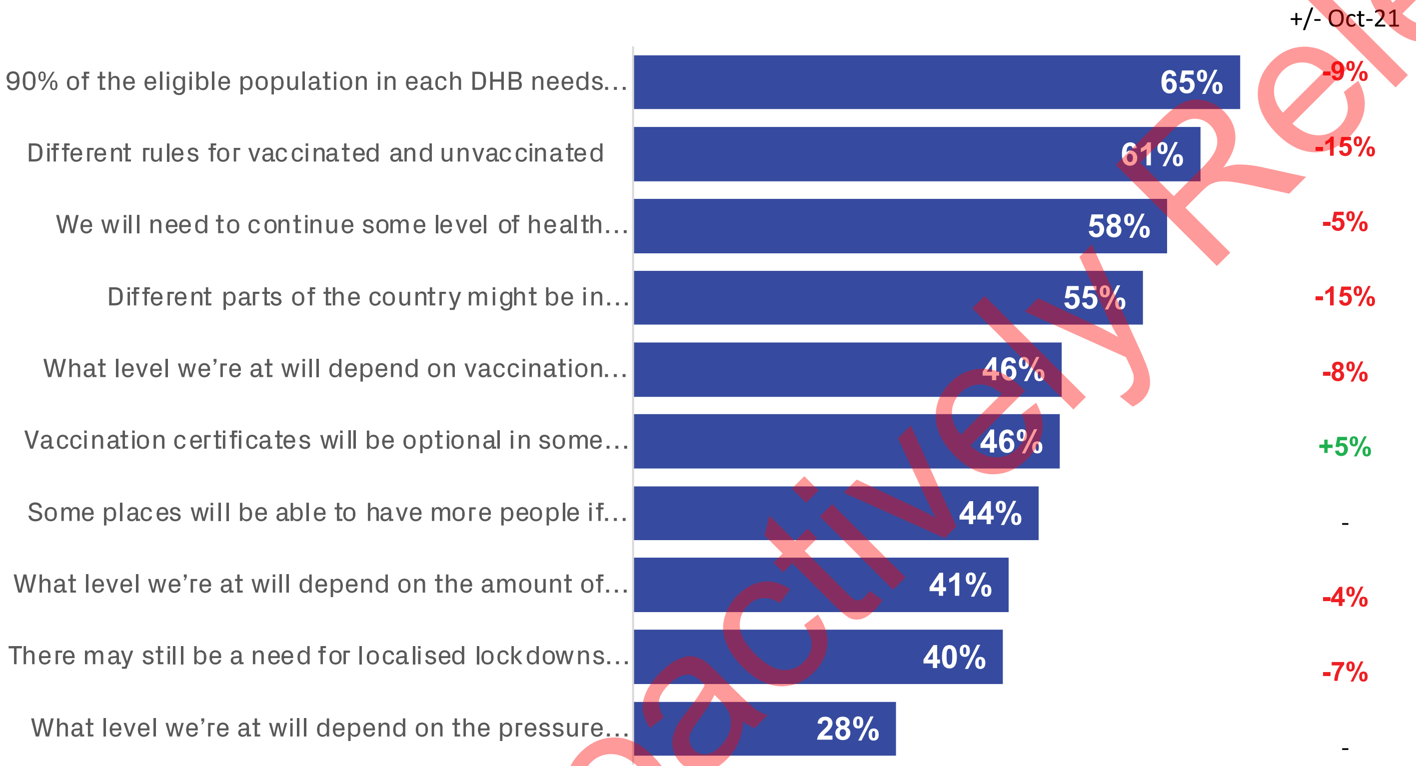
Significantly higher / lower than Sep-21

TRA

Actual understanding of the Framework components is lower than October levels in most cases

Not measured in Pulse

AWARENESS OF FRAMEWORK COMPONENTS (NOVEMBER)

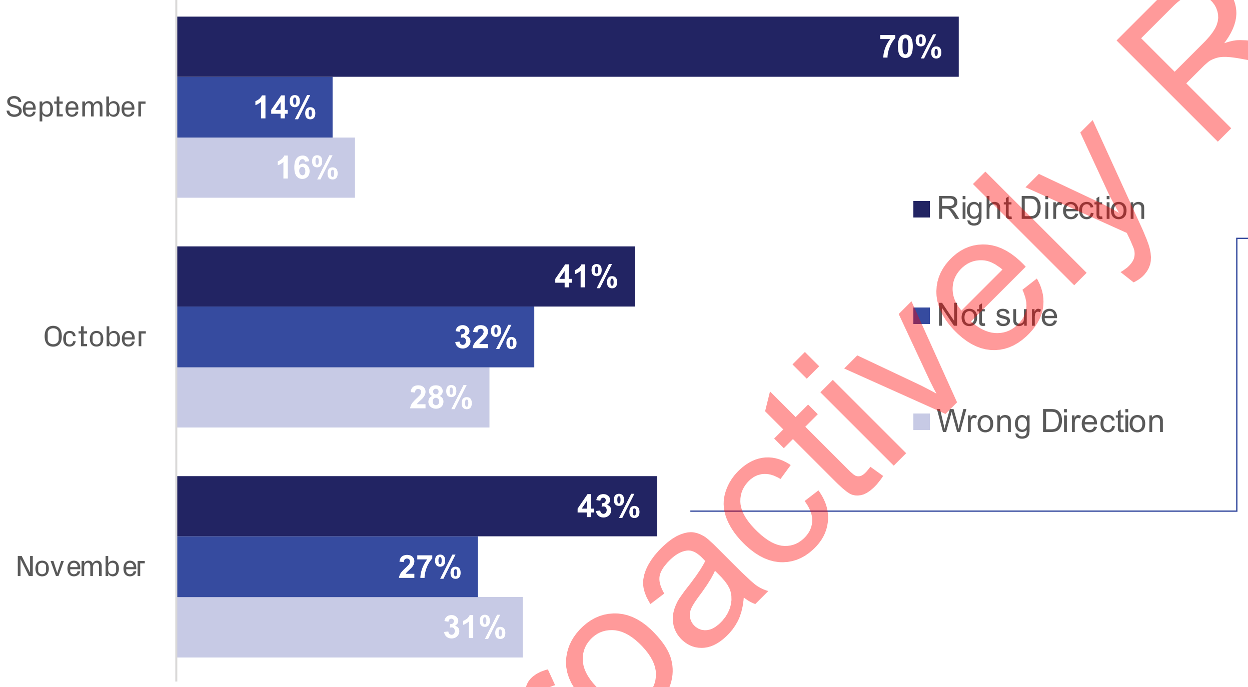


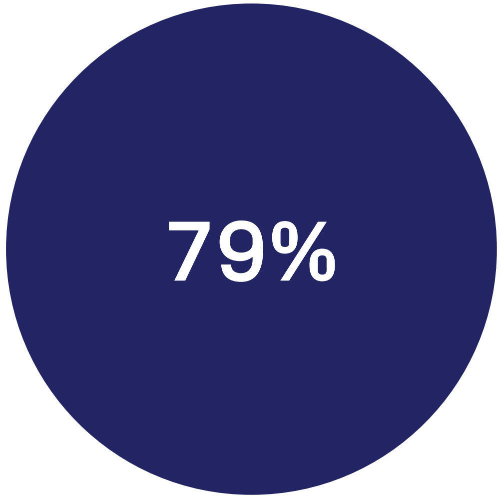
Source: Behaviour & Sentiment Tracker November 2021, October COVID-19 Protection Framework Pulse
Q: What do you think is part of the new 'COVID-19 Protection Framework' (traffic light system)?
Base: Nov-21 total sample n=917, Oct-21 total sample n=409

In November, fewer felt we were heading in the 'right direction' compared to September

We first saw this drop in confidence in October, which has held through to November. We see a reallocation to those who feel we're heading in the 'wrong direction' and are 'not sure'.

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





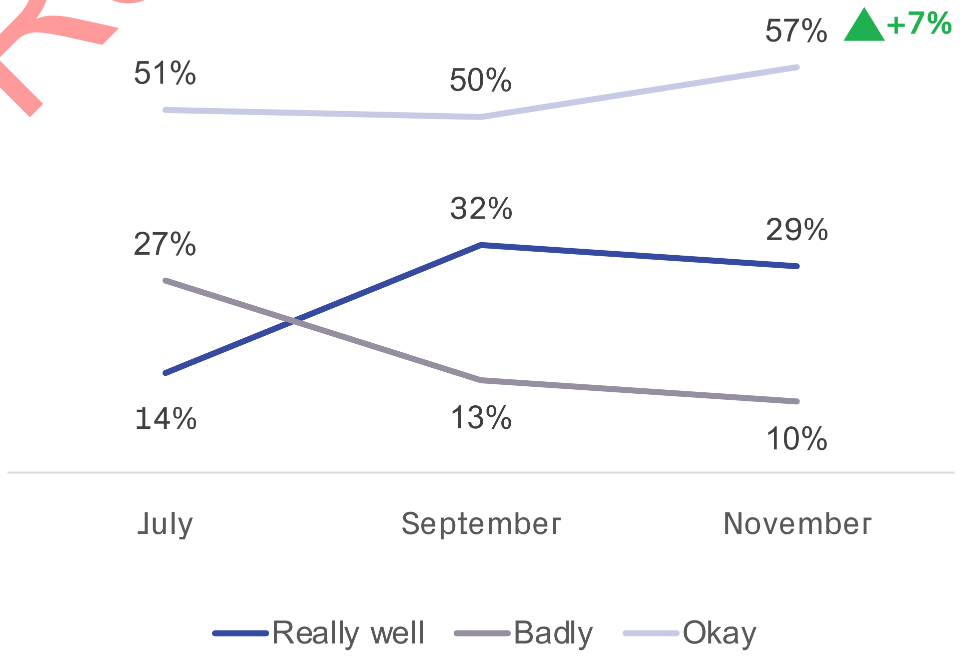
Of those who feel we're going in the right direction **think 'the current restrictions around the country are our best option to keep NZ safe'.**

Source: Behaviour & Sentiment Tracker November 2021, October COVID-19 Protection Framework Pulse, Immediate Needs Dip 2 (September 2021)
Q: How do you feel the country is going with handling the impact of and response to COVID-19?
Base: Nov-21 total sample n=917, Oct-21 total sample n=409, Sep-21 total sample n=846

People are perceiving the vaccine rollout to be going somewhat positively

With the proportion of people feeling it's going badly steadily declining from July

HOW WELL DO YOU THINK THE VACCINE ROLLOUT IS GOING?



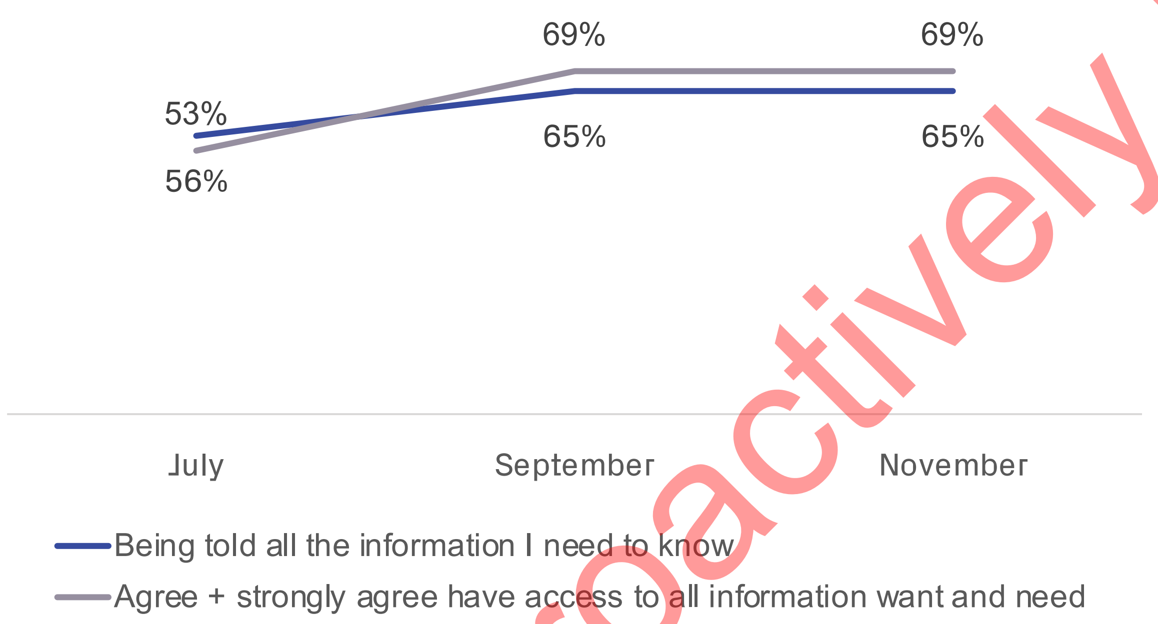
Source: Behaviour & Sentiment Tracker November 2021, Immediate Needs Dip 2 (September 2021)
Q: How well do you think the COVID-19 vaccine rollout is going in New Zealand?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

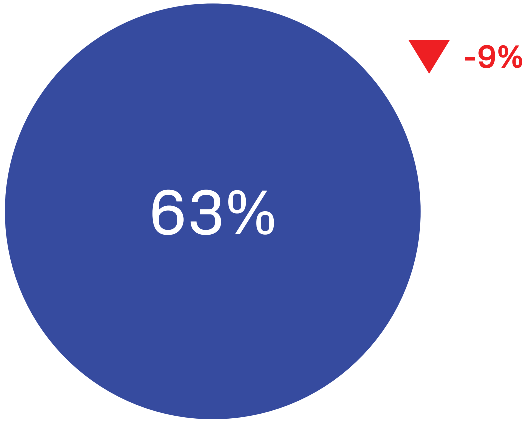
Significantly higher / lower than September-21

Access to quality vaccine information remains positive and stable with levels seen in September

Though we see a drop in people feeling they are being told all they need to know about the vaccine post-announcement

INFORMATION QUALITY AND ACCESS – OVER TIME





Of New Zealanders felt they were being told all of the information they needed to know post-announcement – a significant decrease from 72% pre-announcement.

Source: Behaviour & Sentiment Tracker November 2021, Immediate Needs Dip 2 (September 2021)
Q: How do you feel about the quality of information that is currently being provided to you about the COVID-19 vaccine?
Q: From everything you've seen or heard about the COVID-19 vaccine do you agree that you have access to all the information you want and need?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

Significantly higher / lower than pre-announcement

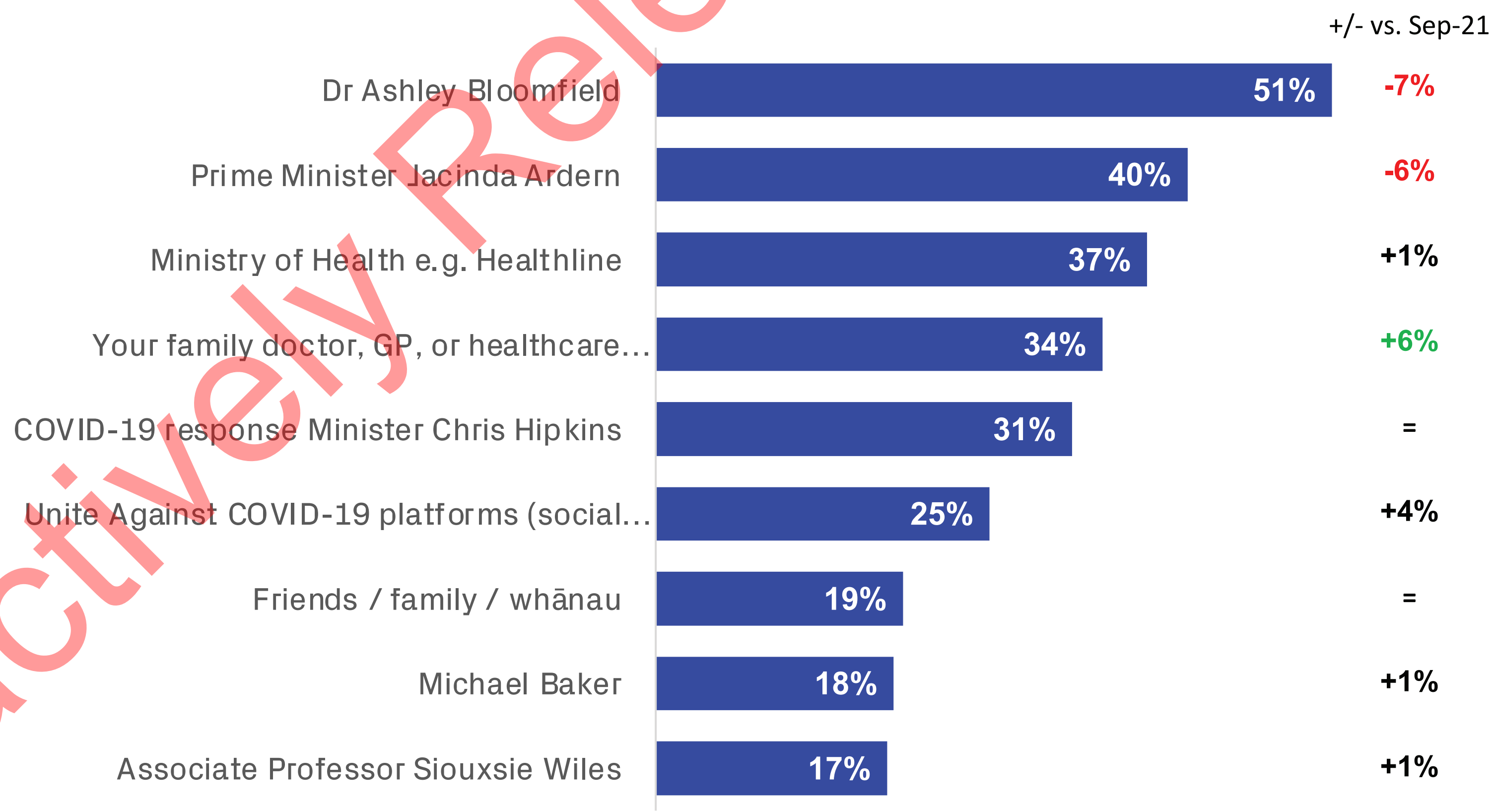
TRA

There are subtle shifts in vaccine influencers compared to September

With minor fluctuations for top influencers

Dr Ashley Bloomfield, Prime Minister Jacinda Ardern and MOH hold their rank as top 3 from September, while family doctor/GP/healthcare professional and UAC platforms have increased.

TOP INFLUENCERS



Source: Behaviour & Sentiment Tracker November 2021, Immediate Needs Dip 2 (September 2021)
Q: Whose opinion do you listen to or seek out in regards to the COVID-19 vaccine?
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

TRA

Auckland compliance

PROJECTIVE COMPLIANCE - ALWAYS/MOST OF THE TIME
AUCKLAND

TRA

Our Non-Compliant group has grown since September, but can be reached with messaging

'NON-COMPLIANT' GROUP – 28%

28%

+7%
from Sep-21

Fall in to our 'Non-Complaint' group.

They 'hardly ever' or 'never' comply with at least one of the listed guidelines and don't 'always' comply with any of the guidelines.

They're significantly more likely to be NZ European and lower North Islanders. Since September, we've seen an increase in Aucklanders, Cantabrians and those living by themselves in this group.

Their information needs are not being met - with their perceived access to, and quality of, information being lower than the overall population. They also have lower visibility of key COVID-19 behaviour messaging. And some don't see the value in complying with COVID-19 health behaviours.

They are similarly motivated to the overall population, but their motivations are less ideological than our most compliant groups.

Their top information sources and influencers are consistent with overall population.

THE JOB TO BE DONE:

1) Increasing visibility of messaging surrounding key COVID-19 health behaviours
2) Emphasise the importance of COVID-19 health behaviours and how they make a difference

We can leverage their motivations in communications, and deliver them through their top information sources and influencers.

Source: Behaviour and Sentiment Tracker September 2021, November 2021
Q: How often do you think other New Zealanders do the following? (Hardly ever + Never)
Base: Nov-21 total sample n=917, Sep-21 total sample n=846

TRA

Overview of our ‘Non-Compliant’ group

‘NON-COMPLIANT’ GROUP – 28%

28%

▲ +7% from Sep-21

Fall in to our ‘Non-Complaint’ group.

They ‘hardly ever’ or ‘never’ comply with at least one of the listed guidelines and never ‘always’ comply with any of the guidelines.

DEMOGRAPHICS

Significantly more likely to be:

- NZ European (77%, +10% total)
- Lower North Islanders (19%, +7% total)

Significantly less likely to be:

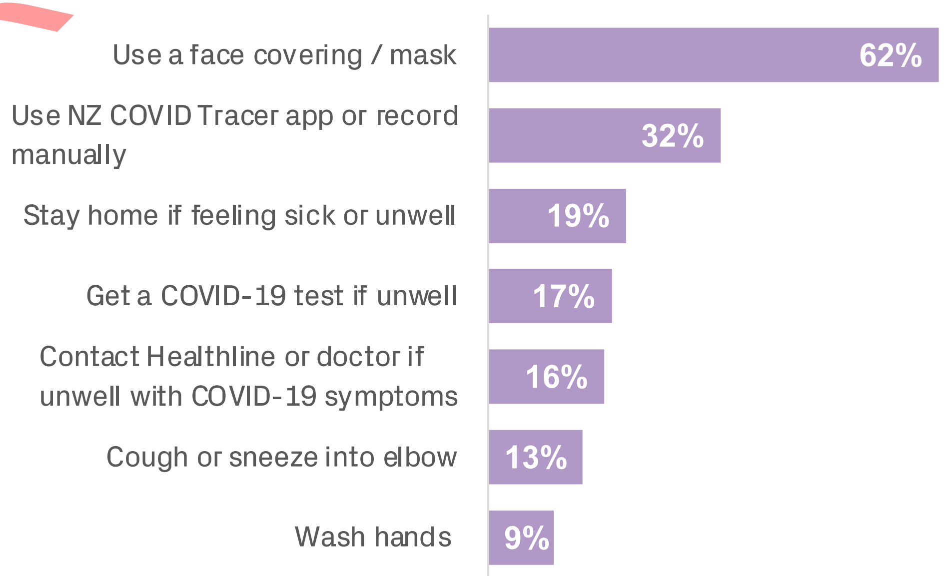
- Asian (7%, -8% total)
- Student (3%, -3% total)

Since September, we have seen significant uplifts amongst the demographics:

- Aucklanders (72%, +9% from Sep)
- Canterbury (13%, +8% from Sep)
- Living by myself (19%, +8% from Sep)

PROJECTIVE COMPLIANCE – MOST OF THE TIME

Like the general population, they are most compliant with mask wearing followed by scanning. However, compliance with other behaviours is low – both involved COVID-19 specific behaviours, and general hygiene behaviours.



Source: Behavior & Sentiment Tracker November 2021
Q: How often do you think other New Zealanders do the following?
Base: Nov-21 Non-compliant group n=258 (‘Hardly ever’ or ‘never’ comply with any of the listed guidelines, and never ‘always’ comply with any of the listed guidelines).

TRA

Key barriers to compliance are access to information, visibility of key messaging, and ideology

'NON-COMPLIANT' GROUP – 28%

Their information needs are not being met

They're significantly more likely to feel they're not being told all the information they need to know (31%, +9% total).

And are significantly more likely to disagree that they have access to all the information they want or need (22%, +9% total)

And have lower visibility of key messaging on COVID-19 health behaviours and guidelines

Significantly more likely to "hardly ever see or hear about" what to do if you get COVID-19 (17%, +8% total).

Significantly more likely to "see or hear a little" about:

- Mandatory record keeping with the NZ Covid Tracer app (26%, +8% total)
- Staying home and getting a test if sick (19%, +5% total)
- Wearing a mask / face covering (19%, +6% total)

For some, they don't see the value in health behaviours

Significantly more likely to disagree that compulsory health behaviours will help keep us safe (20%, +9% total), but 61% (-10% total) agree that they will.

They are less supportive of the current handling of COVID-19

Significantly more likely to think we're heading in the 'wrong direction' (44%, +13% total).

Significantly more likely to disagree that the current restrictions are the best option as this stage to keep New Zealanders safe (34%, +12% total).

And hyper aware of the realities of COVID-19 spreading throughout NZ.

Significantly more likely to strongly agree that COVID-19 will spread through NZ with the coming months (51%, +12% total).

Source: Behavior & Sentiment Tracker November 2021
Q: How often do you think other New Zealanders do the following?
Base: Nov-21, Non-compliant group n=258 ('Hardly ever' or 'never' comply with any of the listed guidelines, and never 'always' comply with any of the listed guidelines).

Significantly higher / lower than Sep-21

TRA

Top motivations are to protect others and minimise the impact of COVID-19 on the healthcare system

'NON-COMPLIANT' GROUP – 28%

Top influencers and information sources mirror the total sample, with news and media alongside media briefings being top sources, and Bloomfield, Jacinda and MoH as top influencers.

They are similarly motivated to comply compared to total sample

They have just as many motivations as the total sample (7.0 on average) and more motivations than the 'True Compliant' group (5.8).

Top motivations are similar to total sample, and not significantly different.

- I want to protect friends / family / whanau (53%).
- I want to protect vulnerable people (50%).
- I don't want the healthcare system to be overloaded (48%).

However, for total sample "I think it's the right thing to follow the rules and law" ranks in third place, but for our 'Non-Compliant' group, it ranks at #6. Likewise, our 'True Compliant' group have greater ideological motivators than the Non-Compliants.

Top information sources are consistent with total sample

- Articles in the news and media (58%)
- Media briefings (54%)
- COVID-19 website (48%)
- COVID-19 advertising (43%)
- Ministry of Health website (41%)

Top influencers are consistent with total sample

- Ashley Bloomfield (56%)
- Jacinda Ardern (41%, -7% total)
- Ministry of Health (40%)
- Chris Hipkins (32%)

Source: Behavior & Sentiment Tracker November 2021
Q: How often do you think other New Zealanders do the following?
Base: Nov-21 Non-compliant group n=258 ('Hardly ever' or 'never' comply with any of the listed guidelines, and never 'always' comply with any of the listed guidelines).

TRA