SUMMARY COVID-19 SENTIMENT

Sentiment and Behaviour – September update

OVERVIEW OF RESEARCH

This research was conducted 9-17 September 2021.

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.

The specific objectives we set out to answer include:

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

For this survey a quantitative method was used, with a sample size of 846 New Zealanders aged 16 years and over. The research included key samples Māori n=145 and Pasifika n=56 and the data was post weighted to be representative of the New Zealand population, in terms of age, gender, region and ethnicity.

Margin of error at the 95% confidence interval is +/ 3.37%. Fieldwork ran from 9th to the 17th of September.

FINDINGS

COVID-19 sentiment

The September research found that while New Zealanders are still in support of the Government response to COVID-19 and believe our Alert Level settings are the best approach right now, fatigue is setting with the current COVID-19 situation and New Zealanders are becoming more concerned about the long-term impacts of COVID-19 on mental health, access to schooling, and general life progress.

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

Survey detail

- A feeling of fatigue is setting in towards the COVID-19 situation and our dominant emotions are now 'neutral' (at 44% up +4% from July) and 'sad' (at 27%, up +12% from July), as opposed to July and May when they were 'neutral' and 'joy'.
- Compared to earlier in the year, Aucklanders are less likely to say their life is better than before COVID-19 (22% vs 26%), however, this remains higher than the rest of New Zealand (14%).
- Since July, we are more realistic that health behaviours will continue and there will be a difference in life compared to pre COVID-19 once the majority are vaccinated – with 82% (up +7% from July).
- Overall, we have more concerns than we have before, with the average number of concerns at 6.4 compared to 4.9 in both July and March.
- We are now more concerned about the long term impacts of COVID-19– such as mental health (47%, +13% from July), not knowing when we will return to normal (47%, +14%), the welfare of low socio-economic areas (31%, +12%) and access to education (30%, +17%).
- New Zealanders continue to support the response to COVID-19 and our current Alert Level settings with 72% agreeing that lockdowns are the best option to keep everyone safe and 74% agreeing that different alert level settings around the country make sense, however, at 23% Aucklanders are less likely to support stricter lockdowns than the rest of New Zealand at 29%

Information access and needs

- The information going out to the public is consistently meeting the needs of the majority of New Zealanders with 69% (+5% from July) agreeing/ strongly agreeing they have access to the information they want and need about COVID-19.

- Government and healthcare professionals are the most accessed information sources, with 89% of people relying on these as their key source of information.
- 79% are using information from non-government and healthcare professional information sources.
- There is a slight growth in those who feel they're being told information they 'don't need to know' (at 13%, +4% from July).
- The current outbreak and introduction of new mandatory mask usage has seen some significant uplifts in relevant messaging awareness, compared to July levels. Wearing a mask/ face covering (60%, + 41% from July), COVID-19 vaccine (58%, +21% from July), stay home and get a test (56%, +25% from July).
- Since July, the UAC Brand is significantly more associated with 'is everywhere' (60%, +10% from July) 'is a brand I trust' (44%, +5% from July), and 'is making a difference' (45%, +9% from July).
- We've also seen a significant uplift in 'is a brand I trust' for 35-54 years (48%, +9% from July), 55 years and over (45%, +6% from July) and females (45%, +6% from July). However, since July we have also seen a large decline in trust for Pasifika (down 29%, -11% from July).

Behaviour and compliance

- Half of New Zealanders are complying 'always' or 'most of the time' with key COVID-19 behaviours with significant uplifts in compliance across all measured behaviours. Peoples willingness to comply is not translating into actual behaviour with some significant differences between willingness to comply and always complying with the behaviour.
- For almost all behaviours, Aucklanders are more consistently compliant than the rest of New Zealand and are 2% more likely to use a face covering/wear a mask, 8% more likely to scan and 7% more likely to get a test if unwell.
- Only 7% of New Zealanders are in the 'true compliant' group ('always' complying with all guidelines). This group is more likely to be 35-54 years and live in Auckland. They are more fearful of COVID-19, believe lockdowns should be stricter and are also more informed and engaged on COVID-19 messages and are more likely to "see or hear them all the time".
- New Zealander's compliance is generally motivated by thinking it's the right thing to do, duty to NZ and protecting others. Alternatively, our 'non compliants' have contextual motivators, such as not wanting another lockdown, and wanting freedom to do what they want back.

Vaccine

- We're feeling more positive about the vaccine rollout and a world where the majority of New Zealanders will be fully vaccinated. 82% of us think the vaccine rollout is going really well/okay – with 'really well' at 32%, up +18% from July. We've also seen people holding views the rollout is going 'badly' drop -14% from July.
- Since July, there has been an increase in perceived quality of and access to information on the vaccine – 69% of us (+16% from July) agree/strongly agree there is access to the information they want and need, and 65% (+9% from July) feel they are being told all the information they need to know.
- Some are starting to feel that there is too much information – this group is more likely to be male), Māori and employed and their vaccination status is comparable to total sample (71% vaccinated).
- We are also listening to more people than before when it comes to the vaccine, but our top influencers remain stable, with Ashley Bloomfield at 58% (+13% from July), Prime Minister Jacinda Ardern at 46% (+12% from July) and Minister Hipkins at 36% (+5% from July). Family doctor/ healthcare professional is at 28% (+2% from July) and UAC brand platforms are at (21%).
- Our 'Vaccinated or Pending' group has doubled since July (now at 81%, +40% from July) and we have seen some movements in our 'Unlikely' and 'Unengaged' segments dropping to 3% and 4% respectively.
- As the 'Unlikely' and 'unengaged' groups decrease, motivating those who are not yet vaccinated will become increasingly difficult as our 'low hanging fruit' book their vaccine.
- The remaining unvaccinated are harder to shift and are less motivated. Their top motivators have changed from 3 September measures. Specifically 'I think it's the right thing to do' (-3% in rank from early Sept), 'I want to protect vulnerable people' (-4 in rank from early Sept).
- The 12% of us who are unvaccinated are more unsure about what being vaccinated means for them. They are more likely to be:
    - under 35, female and unemployed,
    - not positive towards a future where the majority are vaccinated in NZ,
    - more likely to think we are going in the wrong direction with handling COVID-19,
    - they're "not being told all the information they need to know" on the vaccine,
    - less likely to agree with the use of lockdowns;

    - and less likely to think the vaccine rollout is going really well (22%, -10% from total).

Looking to the future

- People aware of the 'Four-Phase plan' ("Reconnecting New Zealanders to the World" are less concerned about when we will return to normal and these people are more likely to feel we're heading in the right direction with handling COVID-19.
- We now have stronger intentions to travel in the next 2 years (now at 70%, +8% from July). These expectations indicate people believe we'll be opening up in the next 1-2 years.
- New Zealanders are looking for guidance out of the current situation - while people still believe lockdowns and the Alert Level settings are our best response right now, we're also looking ahead for guidance on when things will open up and return to 'normal'.
- In terms of 'Four-Phase plan' awareness, the pieces of the plan people are most aware of are the 'eventually opening Quarantine Free Travel for all vaccinated travellers (64%), 'creating new travel pathways to New Zealand based on the COVID-19 risk of the country of origin' (52%), and 'vaccination available to all eligible New Zealanders' (44%).