DEPARTMENT OF THE PRIME MINISTER AND CABINET
TE TARI O TE PIRIMIA ME TE KOMITI MATUA

Briefing

COVID-19 SENTIMENT AND BEHAVIOUR RESEARCH

To: Hon Chris Hipkins
Minister for COVID-19 Response

Date	22/06/2021	**Priority**	Medium
Deadline	25/06/2021	**Briefing Number**	DPMC-2020/21-1110

Purpose

The purpose of this briefing is to provide an overview of research into public sentiment and behaviours in relation to COVID-19 and demonstrate how these insights will be utilised in future communications and engagement activity, and the broader COVID-19 Response.

Recommendations

1. **Note** the contents of this briefing
2. **Advise** if you would like to discuss the results and proposed activity — YES / NO
3. **Agree** to forward this briefing to the Prime Minister — YES / NO
4. **Agree** that this briefing be proactively released, with any appropriate redaction where information would have been withheld under the Official Information Act 1982, in August 2021. — YES / NO

Cheryl Barnes Cheryl Barnes **Deputy Chief Executive, COVID-19 Group**	Hon Chris Hipkins **Minister for COVID-19 Response**
22/06/2021	25/6/2021

Contact for telephone discussion if required:

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Minister's office comments:

- ☐ Noted
- ☐ Seen
- ☐ Approved
- ☐ Needs change
- ☐ Withdrawn
- ☐ Not seen by Minister
- ☐ Overtaken by events
- ☐ Referred to

COVID-19 SENTIMENT AND BEHAVIOUR RESEARCH

Background

1. Commissioned by the COVID-19 Group, research was undertaken by The Research Agency (TRA) to build understanding about how New Zealanders are feeling in relation to COVID-19, and the associated behaviours required of them. We were also interested in finding out how the public are feeling about the future.

2. A qualitative method was used, with a sample size of 1,853 New Zealanders aged 16 years and over, including 255 Māori and 112 Pasifika participants. The data was collected digitally and post weighted to be representative of the NZ population. (See Attachment A)

Research Summary

3. The key findings from the research include:

   a) Public sentiment and future thinking

      i) Overall people are feeling quite content about the current situation in New Zealand and don't feel COVID-19 will have much of an impact on what they want to achieve. This may be leading to some complacency towards the public health behaviours and raises a question about wider public apathy and passiveness towards COVID-19.

      ii) Three quarters (75%) of those surveyed say that as a country we are heading in the right direction with our COVID-19 response. There is a small group (12%) who say we're going in the wrong direction with the balance of people (13%), not sure.

      iii) Overall, COVID-19 isn't seen to be getting in the way of progress and how people are feeling about the future. Participants' goals reflect normal life - spending time with friends and family, going on holidays, and financial progress. In most cases, people don't feel COVID-19 will have much of an impact on what they want to achieve, and people are looking forward to feeling less stressed, relaxed, secure and content in the future.

   b) Travel and borders

      i) More than half (53%) of those surveyed are feeling worried about the prospect of opening the border beyond Australia and the Cook Islands. New Zealanders are more comfortable with Cook Islands quarantine free travel than Australian quarantine free travel.

      ii) While people are slightly more supportive of workers coming to New Zealand to support requirements, they are still worried about that risk. More than four fifths (84%) of people are supportive of stopping travel from very high-risk countries.

      iii) New Zealanders planning a trip generally intend to travel domestically – with 83% planning to undertake this within the next 12 months. Of those surveyed 42% plan to travel to the Cook Islands and 62% plan to travel to Australia. However, on average only 54% of people have thought about what preparations they need to do if they decided to travel away from their home (either within New Zealand or overseas with QFT).

c) Behaviours

i) While the economy is still top of mind (51% of people, down from 76%), New Zealanders are increasingly thinking about the COVID-19 vaccination plan (40% up from 23%).

ii) People feel they are largely willing to do their part to prevent COVID-19, but we aren't necessarily seeing this in their behaviours. They are motivated by following the rules, their sense of duty, avoiding another lockdown, health concerns, and protecting family and friends.

iii) A third of those surveyed are realistic that COVID-19 health behaviours will be needed after the vaccination roll-out (36%), and 47% of people expect there will be some differences in day-to-day life compared to pre-COVID-19. Only 9% of New Zealanders believe that getting the country vaccinated will return life to how it was pre-COVID-19.

d) Information

i) Most people feel like they're getting the right amount of information and it is of quality, but this positive assessment has weakened since March 2021. According to the survey, 83% of New Zealanders are getting at least some of their information from Government sources and healthcare professionals.

ii) Those who are getting information from non-Government sources (17%) are more likely to be Pasifika or 16-17 years old. For this group, sources of information include articles in the news/media (48%), friends and family (24%), social media (23%), and the internet (20%).

iii) There has been an increase in reach for the Ministry of Health and health officials and this is likely in response to the focus on the vaccination roll-out. Most people (84%) listen to at least one Government source or healthcare professional as an influencer.

e) Unite Against COVID Brand

i) The Unite Against COVID-19 brand performs strongly (42% see it as a brand they trust) but has a lower relevance for some audiences, specifically under 35's, (24%) Māori (27%) and students in paid work (18%) compared to an overall rating of 34% for relevance. Trust in our brand is lower amongst Māori (35%).

ii) These scores regarding brand are very high, and relatively speaking, UAC is a very strong brand. This is important as it means that people put trust in what we say and gives us a strong platform to continue to deliver our messages.

Next Steps

4. The insights from this research will assist us in evolving our messaging and campaigns, with a focus on motivators and audience profiles to enable segmentation and targeted approaches.

   i) A refreshed campaign approach is in development with targeted activations to encourage people to more consistently undertake key health behaviours. This includes plans to develop more specific campaigns for each health behaviour, providing a 'why' that is relevant to our current context and more strongly connected to 'possibilities positioning' – aligning and building on the vaccine campaign. It also includes development of more targeted content and dissemination of that content, with a focus on those audiences who are less engaged.

   ii) The first output will be a revised tracer app campaign, scheduled to launch alongside updates to the app in July 2021. This will draw upon COVID tracer app research completed in April (see Attachment B)

   iii) Engagement, including events, will be used to connect with specific audiences who this research indicates may be less likely to comply with health behaviours, i.e. Māori, Pasifika, under 35 males.

   iv) We are expanding our work with business, partner agencies, tourism and hospitality sector to encourage and champion health behaviours in the everyday environment. The UAC website will continue to be positioned as a key source of information signpost to other Government agencies.

   This will link to the policy work underway to identify potential levers to drive compliance.

   v) Other UAC channels, such as the messaging grid (daily agreed messaging provided to stakeholders), stakeholder engagement and social channels will also continue to connect resurgence and QFT pause/suspend with 'why' we need to keep up health behaviours.

5. This research will help inform policy work underway to identify potential levers to drive compliance and increase use of the COVID-19 Tracer app.

6. This research will inform the communications and engagement aspects of the 'Reconnecting New Zealanders' work programme. The specific insights on opening borders will be used for this work.

7. Further regular research will be undertaken in the form of 'pulse checks' every six to eight weeks to measure changes in sentiment and to test different messaging and approaches developed.

8. Additional qualitative research is being scoped to drill into specific audiences, such as Māori and Pasifika where there is a need to develop a deeper understanding of those groups' engagement.

9. This research is feeding into work we are doing with the Ministry of Health in relation to vaccine and health behaviours campaigns, communication and engagement.

10. The timing of pulse checks will be reviewed and considered in conjunction with the 'Reconnecting New Zealanders' work programme, as they will be an important indicator for decision making.

Financial Implications

11. The ongoing costs will continue to be met from the COVID-19 Group's budget

Consultation

12. The research was shared with your office two weeks ago and with key Government agencies in confidence.

13. The thinking around the evolution of the communications and engagement activities was shared with your office on 16 June. Officials are happy to talk you through it.

Communications

14. Development of a communications plan to support proactive release of the research is in progress. We will work with your office on this.

Attachments:		
Attachment A:		Summary Sentiments and Behaviour Research - May 21 2021
Attachment A:		Summary COVID Tracer App Research – 21 April 2021

SUMMARY COVID-19 SENTIMENT - MAY 21

OVERVIEW OF RESEARCH

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

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

FINDINGS

Sentiment & Future

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

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

Travel & Borders

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

Behaviours

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

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

Information

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

Unite Against COVID Brand

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

Specific Audiences

(*Note: there is diversity within these groups)

<u>Māori</u>

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

<u>Pasifika</u>

- Pasifika are feeling relatively positive about their own lives, and that NZ is handling COVID-19 well (78% vs 75% total).

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

<u>Indian</u>

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

<u>Under 35 males</u>

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

SUMMARY COVID TRACER APP APRIL 21

OVERVIEW

Research: Understanding how to change NZ COVID-19 Tracer app behaviour through targeted communications.

Purpose of Research: one of the key actions people can do is to consistently use the NZ COVID-19 tracer app and enable blue tooth tracing. We have seen the scanning number decrease as the perceived risk of COVID-19 in the community is lower. We need to increase the number of people scanner and turning Bluetooth tracing on. To help inform the development of messaging and a revised campaign, we needed to better understand New Zealander's motivators and barriers to using these tools. TRA were contracted to undertaken research. A qualitative method was used, with a sample size of 1,921.

SUMMARY OF RESEARCH FINDINGS

- The main reasons New Zealanders think it is important to use the tracer app are:
  - To make it easier for contract tracers if there is another COVID-19 outbreak
  - To quickly identify close contracts of COVID-19 cases who need to self-isolate
  - To help avoid another lockdown
- Only 4% of respondents said it isn't important to use the app
- Aucklanders are more likely to have the app downloaded, but their usage is in line with the rest of the country.
- 75% of respondents said they had downloaded the app
- Of those who have downloaded the app, 70% say they have enabled Bluetooth. However, it is expected the number of people who say they have turned Bluetooth on is either overstated, or people are confused about the process, as these numbers do not align with actuals.
- Knowledge and understanding are the biggest barriers to people enabling the Bluetooth function in the app.
- The majority of New Zealanders who have the app are not scanning consistently; 40% of people say they scan everywhere they go; 34% report scanning at most places; 26% say they scan less frequently
- Out of all the actions people have been asked to do, using the Tracer app and enabling Bluetooth are seen as relatively lower importance
- There are some locations where scanning happens at a lower frequency. These tend to be routine places people visit such as work, public transport, gym. People say they forget or track their movements in another way with these locations
- Young females (16-35) are lower frequency scanners and are less likely to have Bluetooth enabled.
- This group also represents a higher risk group, as they tend to visit more locations overall.
- More young females believe there is no need to use the app

- Business owners/manager are more likely to have the app downloaded and use it with greater consistency