

COVID TIMES

Backing New Zealand
24 April 2020



COLMAR BRUNTON
A Kantar Company



AN UPDATE FROM US

Kia ora, and welcome to the latest edition of Colmar Brunton's COVID Times. Once again we look at trust and leadership, placing it into a global context. We also examine how our COVID resolutions could impact New Zealand under the new 'normal'.



So, what's new ...

Kiwis continue to back the Government in their management of the crisis. Public support outstrips what we see across the G7.

- 87% approve of the way the Government is responding to the pandemic (up 3 points).
- This compares to an average of 50% across the G7 (down 4 points).

This support extends to specific actions taken to protect both lives and livelihoods.

- 82% feel the NZ Government has done a good job on testing (vs. 46% across the G7).
- 78% feel the NZ Government has done a good job on supporting those who face a loss of income (vs. 48% across the G7).

And the timing of the new phase in our fight against COVID has also won public support.

- 83% support the decision to move to Alert Level 3 after the ANZAC weekend, while only 11% oppose this decision.
- Indeed, the proportion who feel the Government's response on the outbreak is 'about right' has increased from 60% to 81%.

Thinking about how the New Zealand Government is responding to the coronavirus outbreak, do you think the measures they have put in place...?

"Are about right"

60%



3-5 April

81%



20-21 April

New Zealanders attribute our ‘success’ in dealing with the pandemic to multiple factors. Chief among them is the Government’s strategy of ‘going hard and going early’.

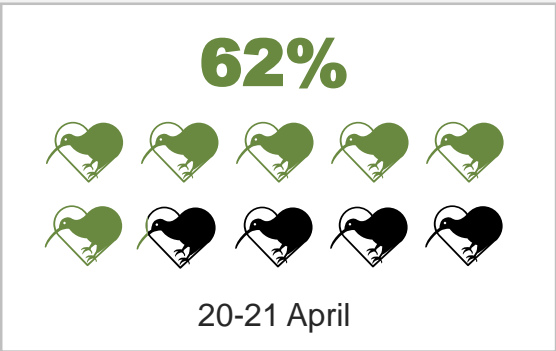
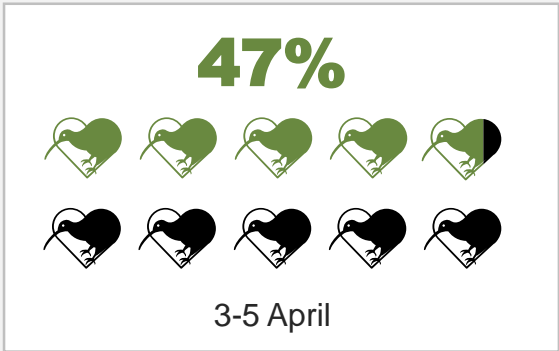
Reasons why we have experienced relatively few deaths due to coronavirus:

- 80% feel we took effective action early on.
- 52% feel our geographical isolation played a part.
- 44% point to the role of good public health measures.
- 22% simply feel we’ve been lucky.

This success likely underpins a surge in national pride.

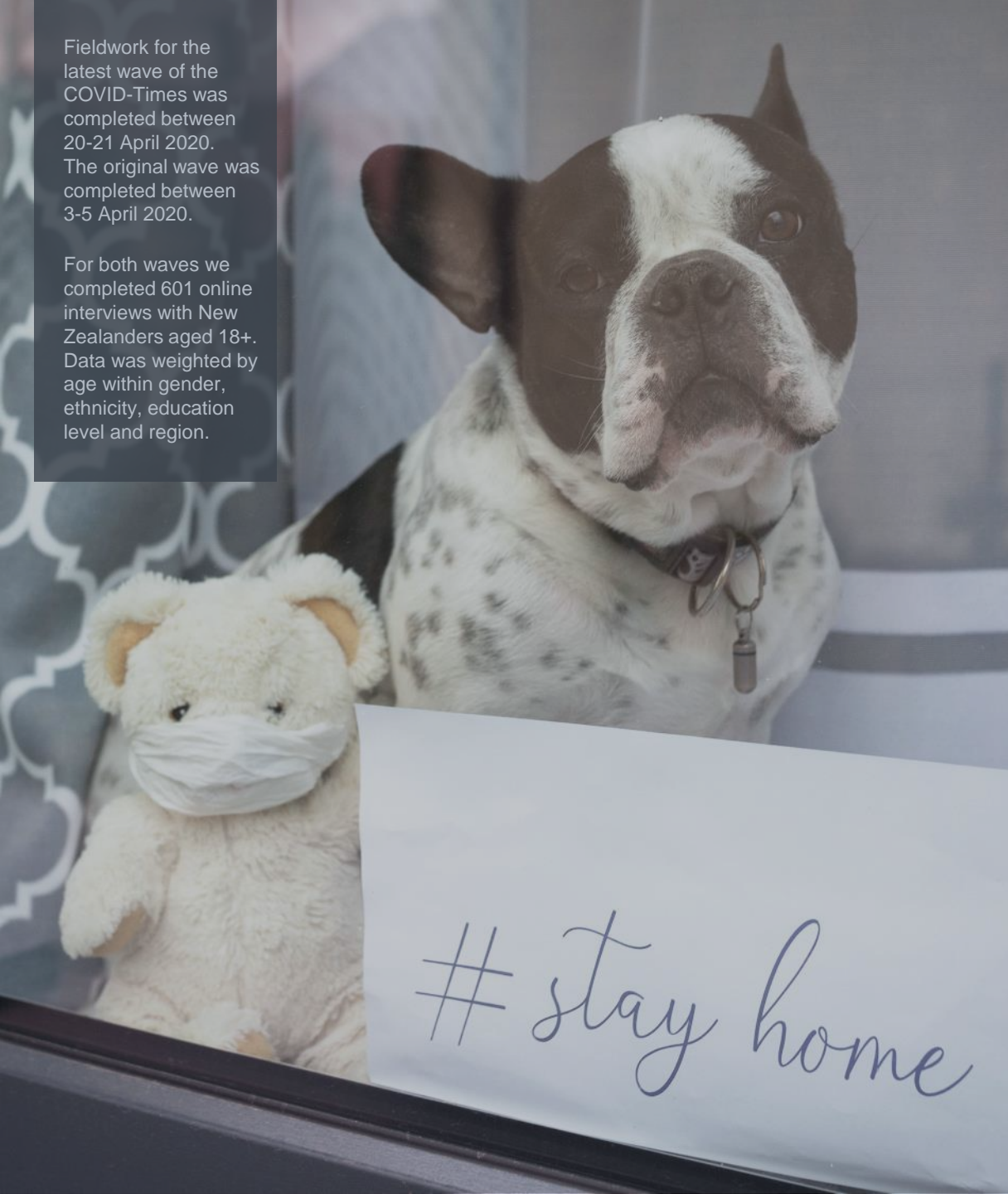
- Three in five New Zealanders feel a greater sense of national pride than they did pre-COVID. This is an even stronger result than we saw previously (+62% vs. +47% two week ago).

Increase in national pride since before the outbreak began.



Fieldwork for the latest wave of the COVID-Times was completed between 20-21 April 2020. The original wave was completed between 3-5 April 2020.

For both waves we completed 601 online interviews with New Zealanders aged 18+. Data was weighted by age within gender, ethnicity, education level and region.



And this sense of national pride is a key factor shaping our post-COVID resolutions. Our strongest resolution is to help put the Kiwi economy back on its feet. But while Kiwi brands might benefit under the new normal, public transport use is at risk.

- 60% of New Zealanders plan to provide more support to their locally owned business, as well as New Zealand owned businesses.
- 22% of public transport users say they will use public transport less (only 8% say they will use it more).
- Some of those who are reluctant to return to public transport are choosing to work from home more (38%). They are also looking at using active transport modes such as walking (41%) and cycling (9%). While relatively few indicate they will be swapping public transport for a car (14%).

Finally, there is also a potential comms challenge on the horizon when it comes to contact tracing.

- 42% say they would be very or extremely likely to use a contact tracing app to help control coronavirus. Based on our experience of translating intention into behaviour, we believe the Government will need to further build support if the app is to be effective.

Percentage of New Zealanders who say they are 'very' or 'extremely' likely to use a Government contact tracing app:



42%

All New Zealanders 18+

Want to know more?

If you would like to know more about COVID Times please contact Edward at Edward.Langley@colmarbrunton.co.nz.





Fieldwork dates

20-21 April 2020

(fieldwork launched after the Prime Minister's announcement at 4pm)

Where possible, results are compared back to the first COVID Times survey taken on 3-5 April.



Sample

601 New Zealanders aged 18+

The results have been post-weighted to match New Zealand population proportions for age, gender, location, ethnicity, and education level according to 2018 Census counts.



Survey type

Online surveys

All respondents were sourced from the Colmar Brunton panel.

Comparisons to G7 countries

Many of the questions in this survey were first developed for the Global Public Division of Kantar (Kantar is Colmar Brunton's parent company). They were asked of residents of G7 countries. Where relevant, the New Zealand results are compared to the G7 results. Each country's results are based on 1,000 residents.

The latest G7 surveys were taken from 9-13 April.



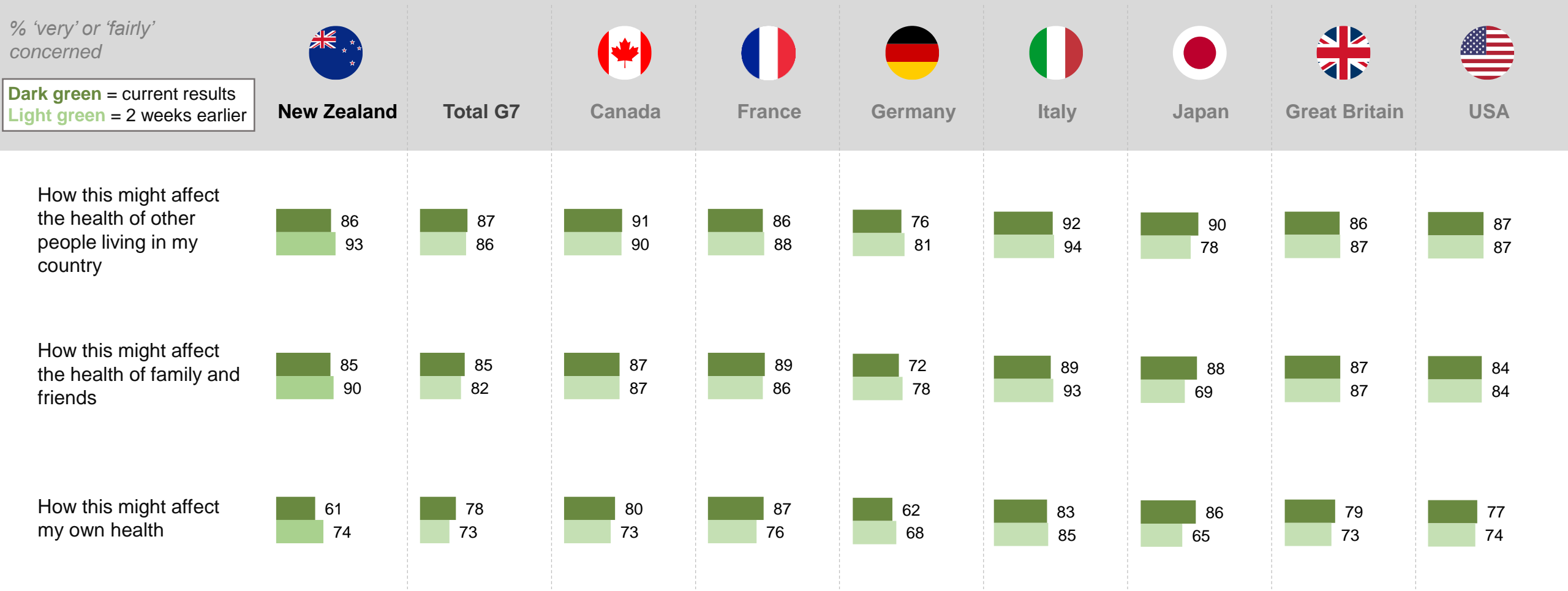




Concern about the impact of COVID-19 on health



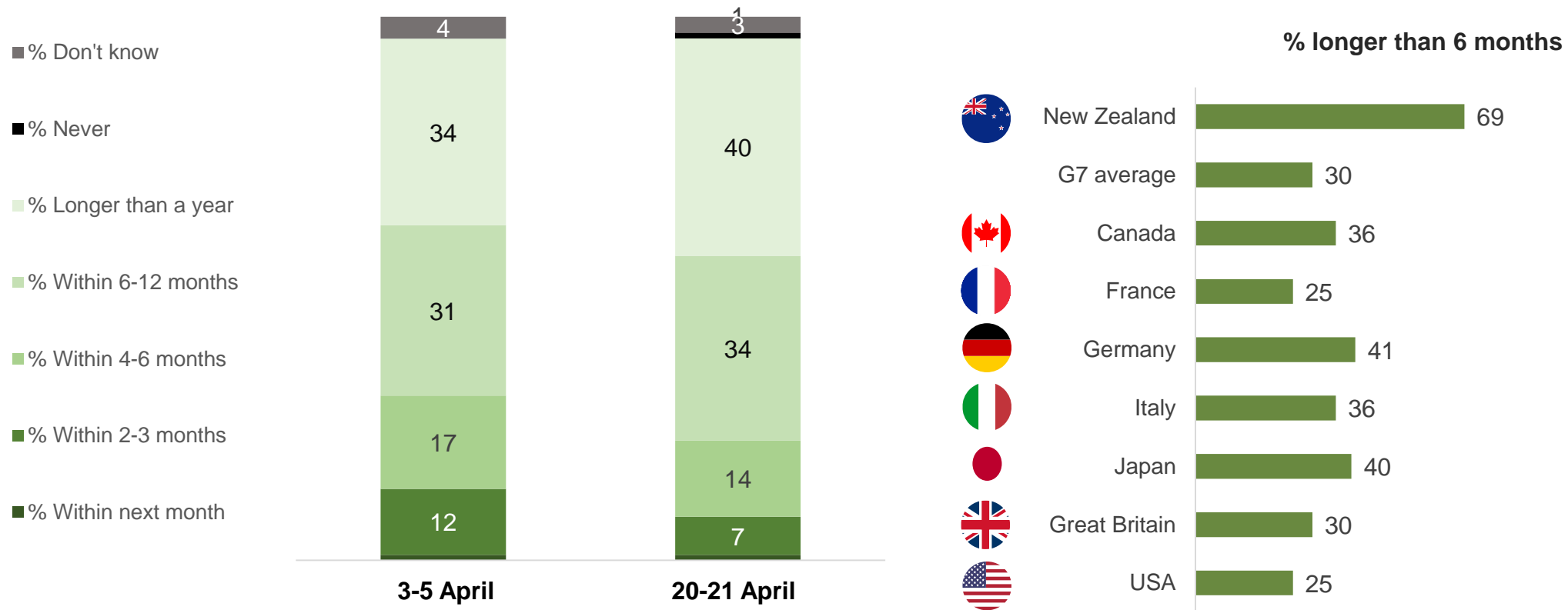
Still thinking about the coronavirus, how concerned are you about each of the following?



Expected time to recover



In your opinion, how long do you think it will take [COUNTRY] to recover, and for people to return to a normal way of life?

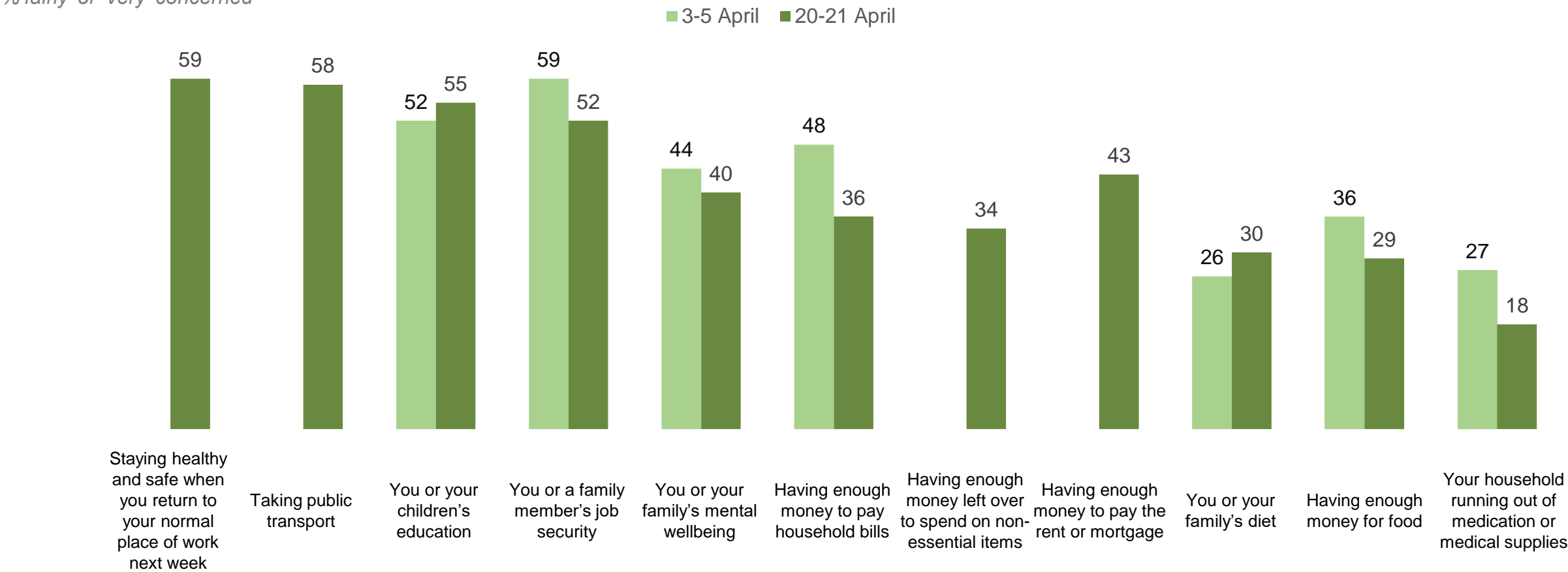


Concern about personal impacts



At this time, how concerned, or not, are you about...?

% 'fairly' or 'very' concerned

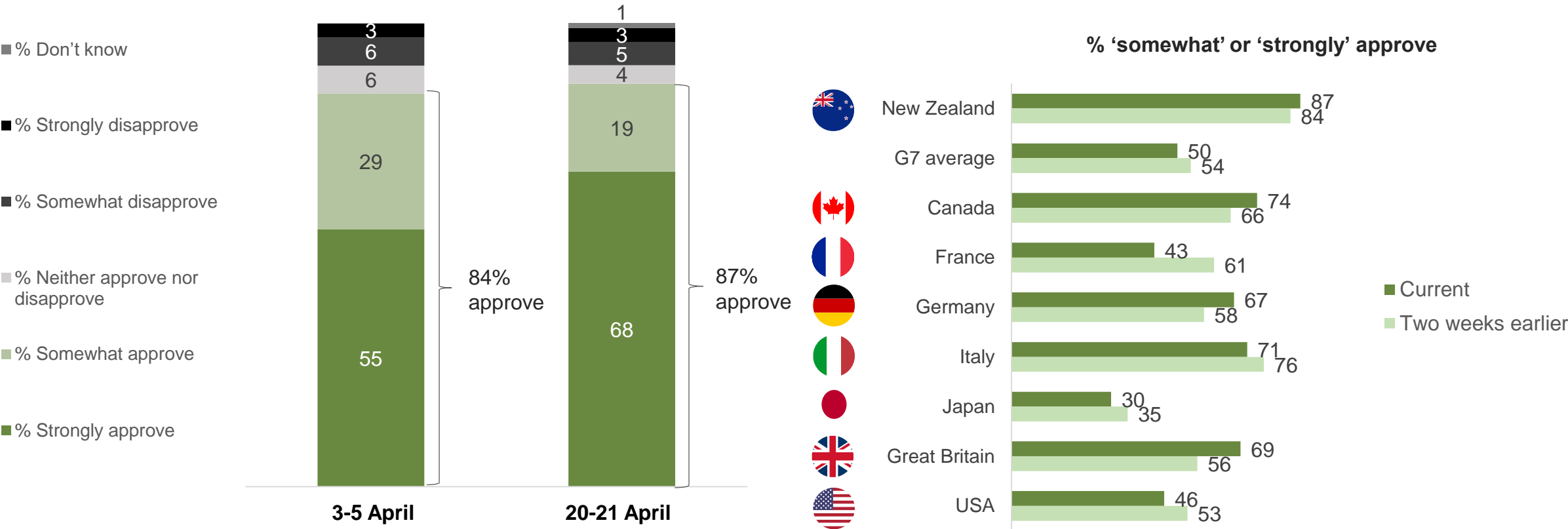




Approval of Government's response to the pandemic



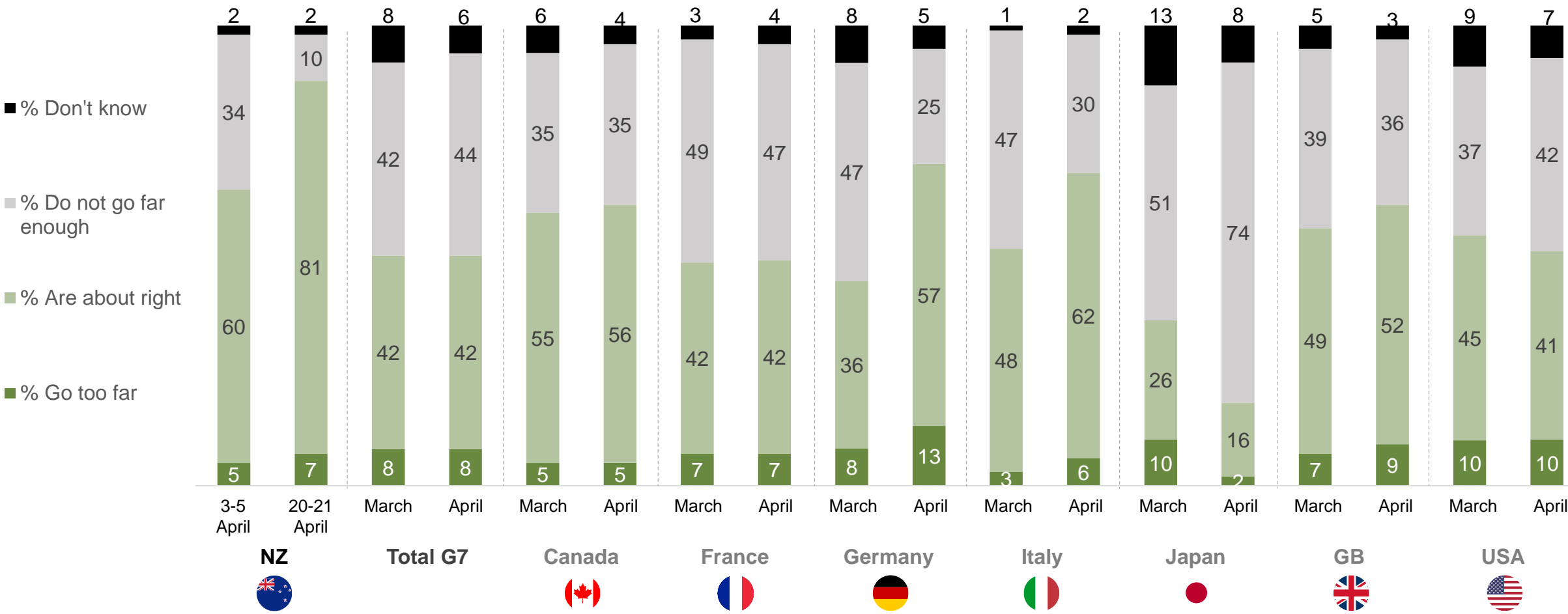
How much do you approve or disapprove of the way [YOUR COUNTRY'S] Government is responding to the coronavirus pandemic?



Government measures: too far or not enough?



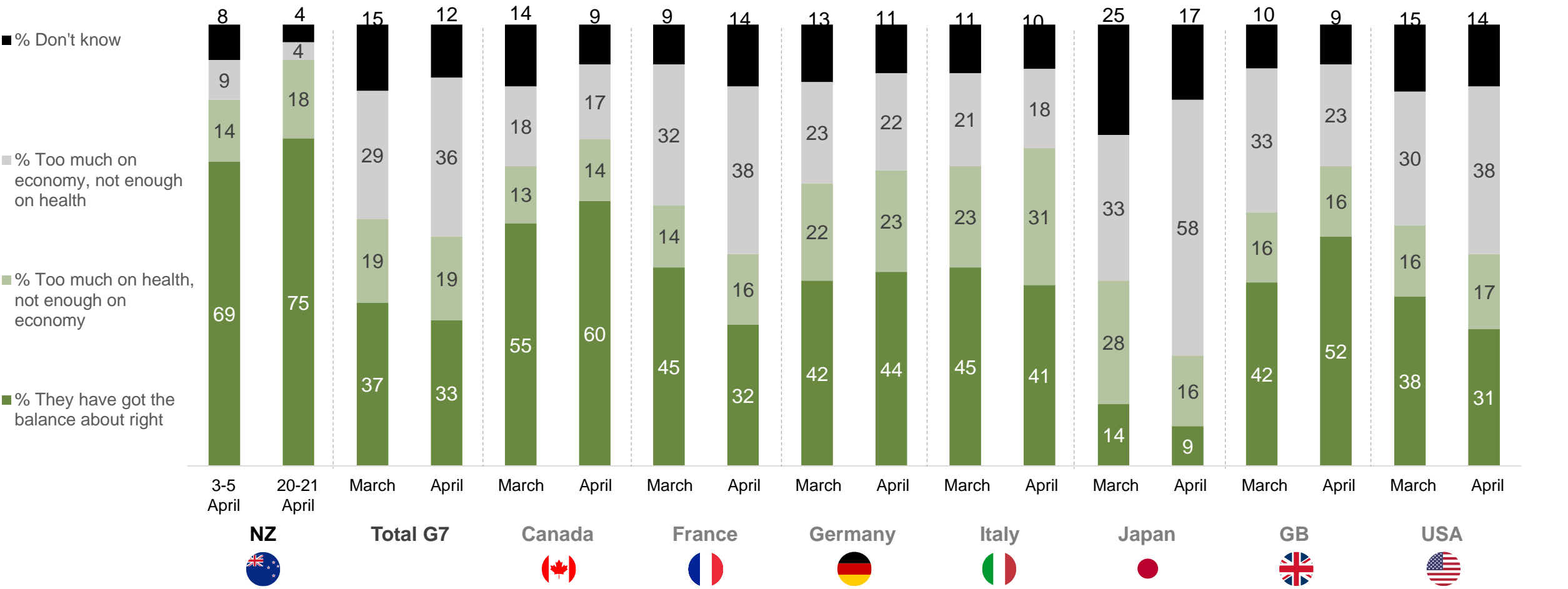
Thinking about how [YOUR COUNTRY'S] Government is responding to the coronavirus outbreak, do you think the measures they have put in place...



Lives vs. livelihood: should the Government prioritise people's health or the country's economy?



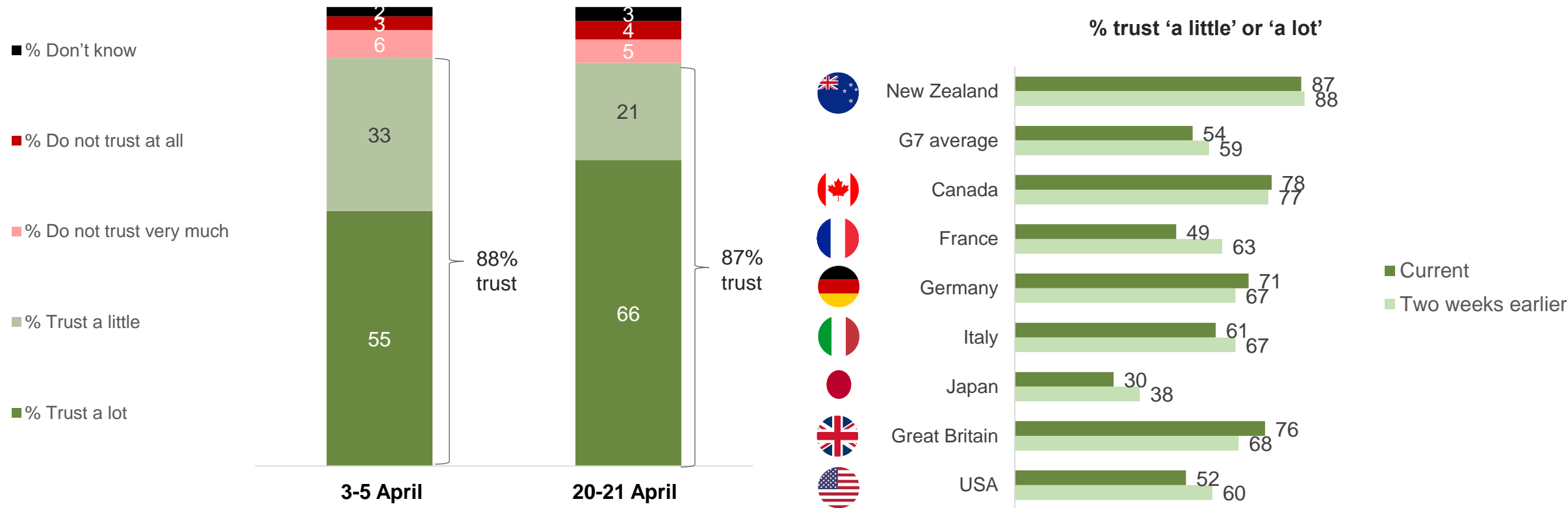
Which of these comes closest to your view on how [YOUR COUNTRY'S] Government is responding to the coronavirus outbreak?



Trust in the Government to make future decisions



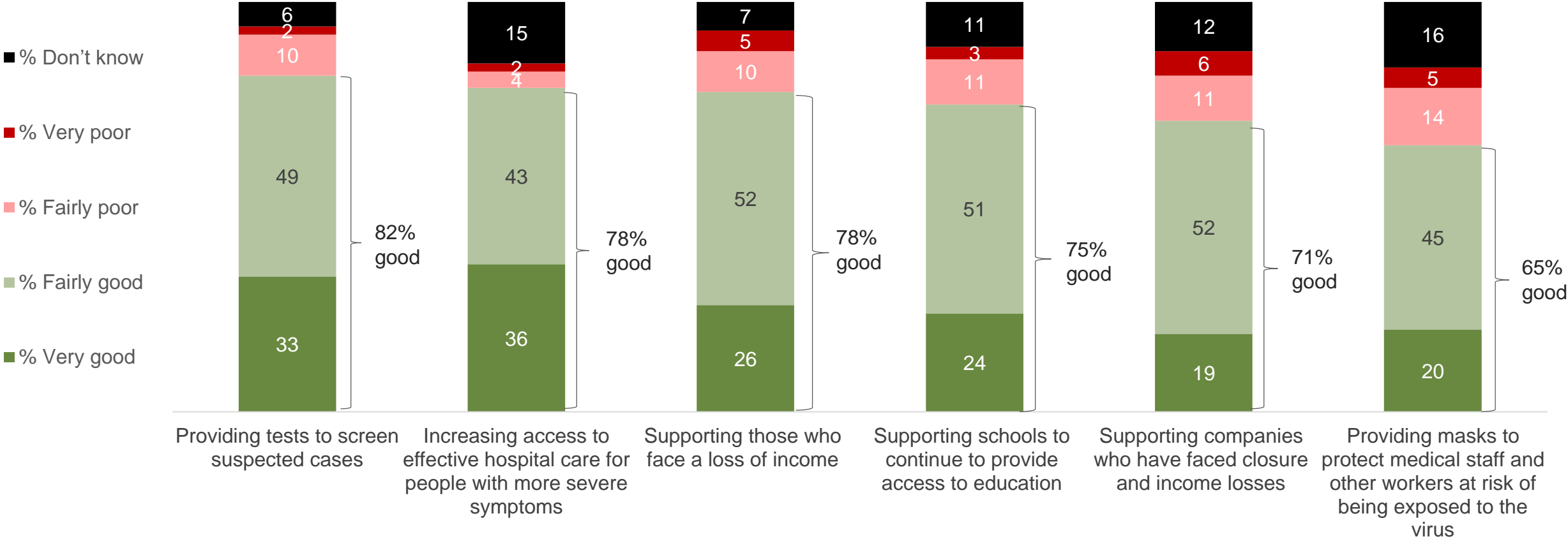
Still thinking about [YOUR COUNTRY'S] Government's response to the coronavirus outbreak, how much do you trust them to make the right decisions in the future?



Rating of Government's medical and social responses



How would you rate the New Zealand Government on...?

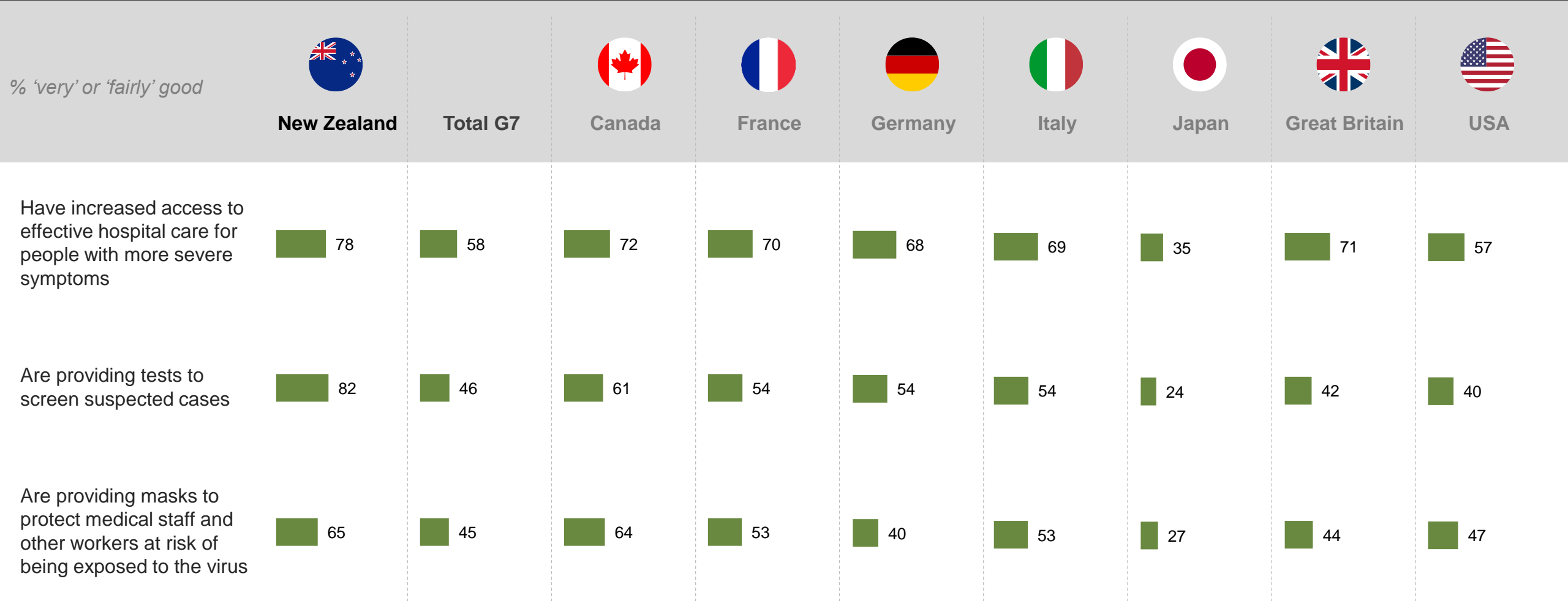


Base: All New Zealanders 18+ (n=601). Results are from 20-21 April survey. These questions were not asked in the 3-5 April research.

Rating of Government medical response: comparisons to G7 (1 of 2)



How would you rate [YOUR COUNTRY’S] Government’s response when it comes to the extent to which they…?

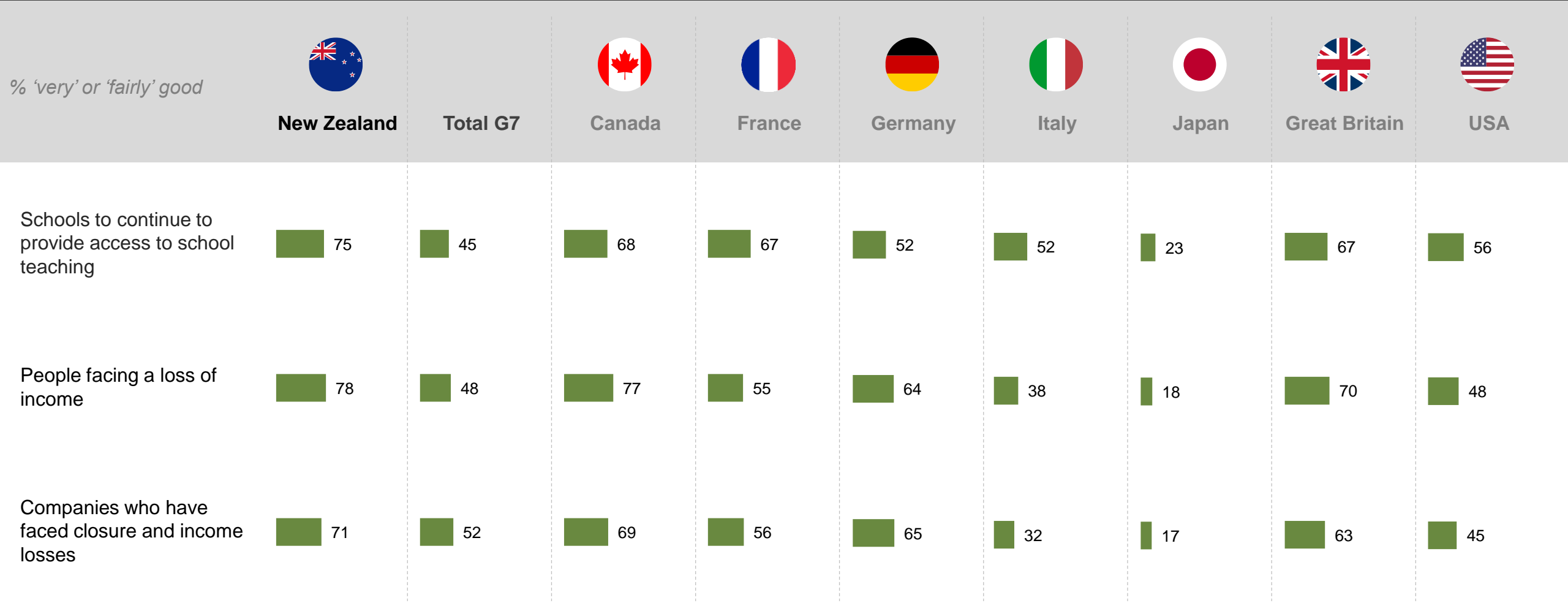


Base: Total (All New Zealanders 18+ n=601; G7 countries n=1,000 each). Results are from 20-21 April survey. These questions were not asked in the 3-5 April research.

Rating of Government social response: comparisons to G7 (2 of 2)



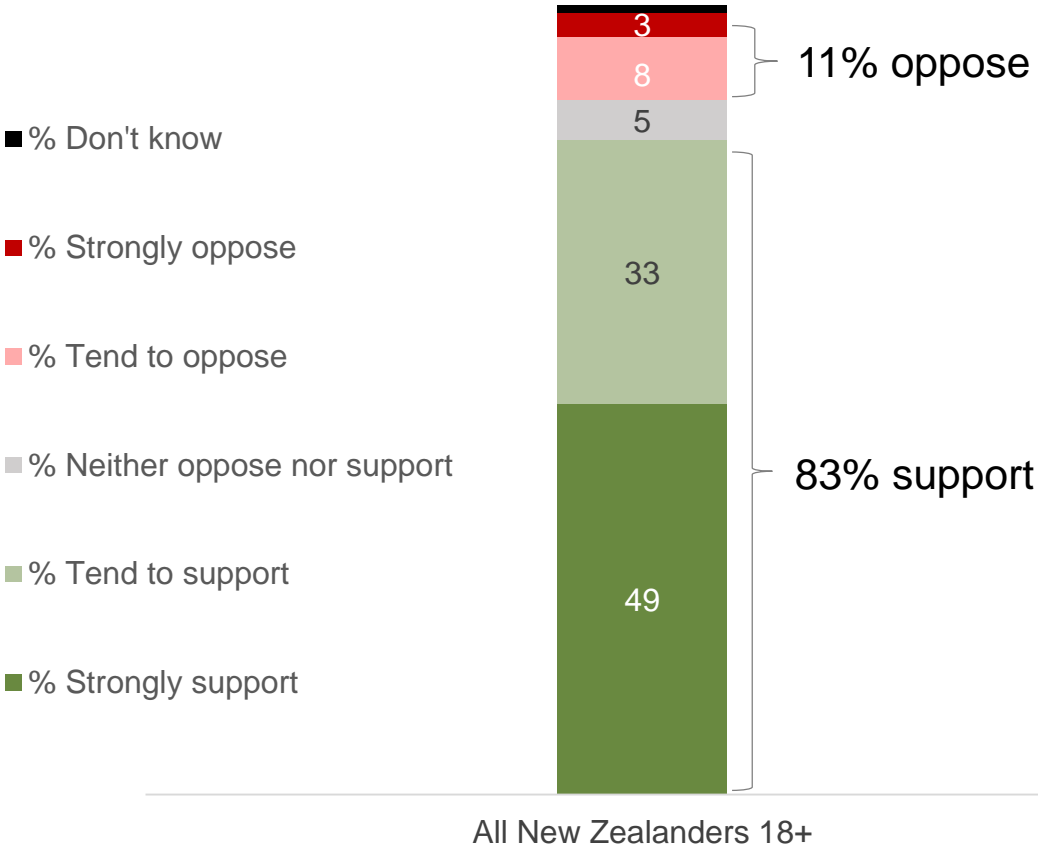
How would you rate [YOUR COUNTRY’S] Government’s response when it comes to supporting…?



Support for Government's decision of 20 April



The Government announced it will move from Alert Level 4 (Lockdown) to Alert Level 3 (Restrict) on Monday 27 April. How much do you support or oppose this decision?

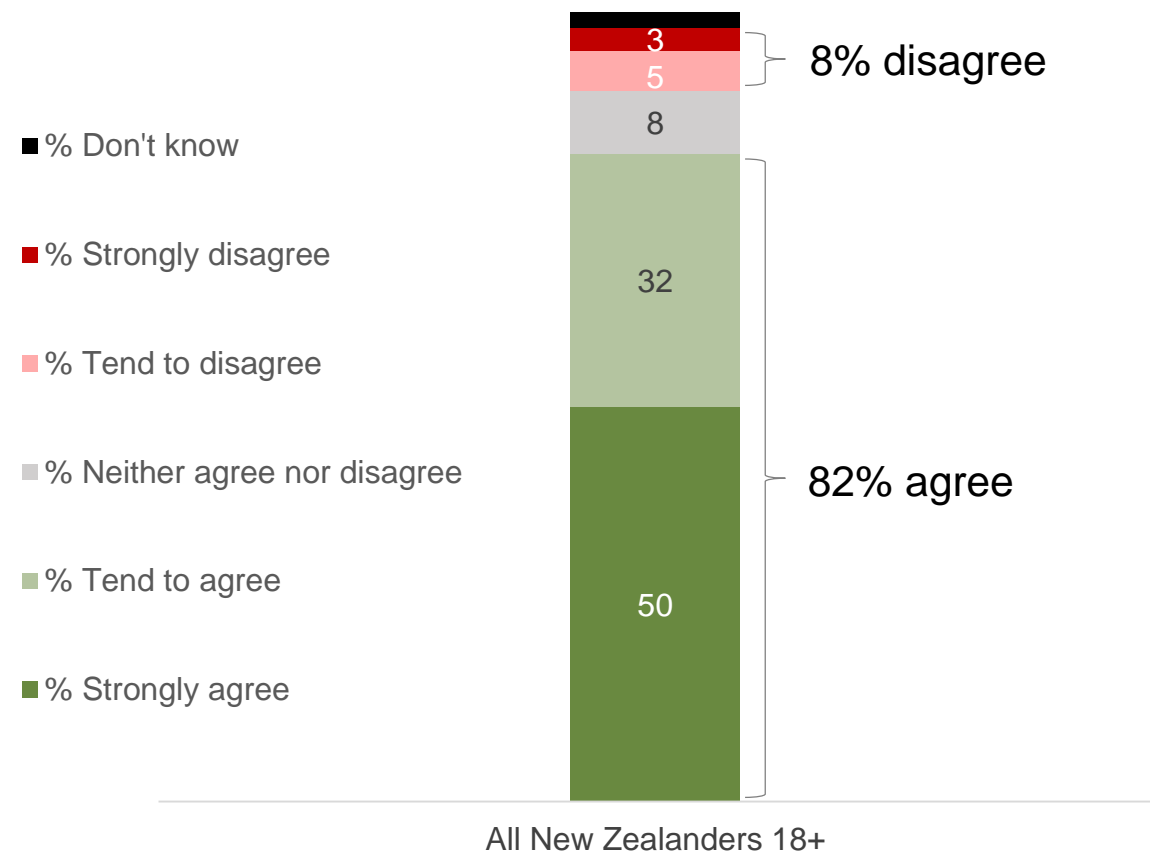


There are no significant variations in opinion by demographic group.

Belief in long-term effectiveness of pandemic control measures



How much do you agree or disagree that the measures the Government has put in place to control the coronavirus pandemic will be worth it in the long-run?



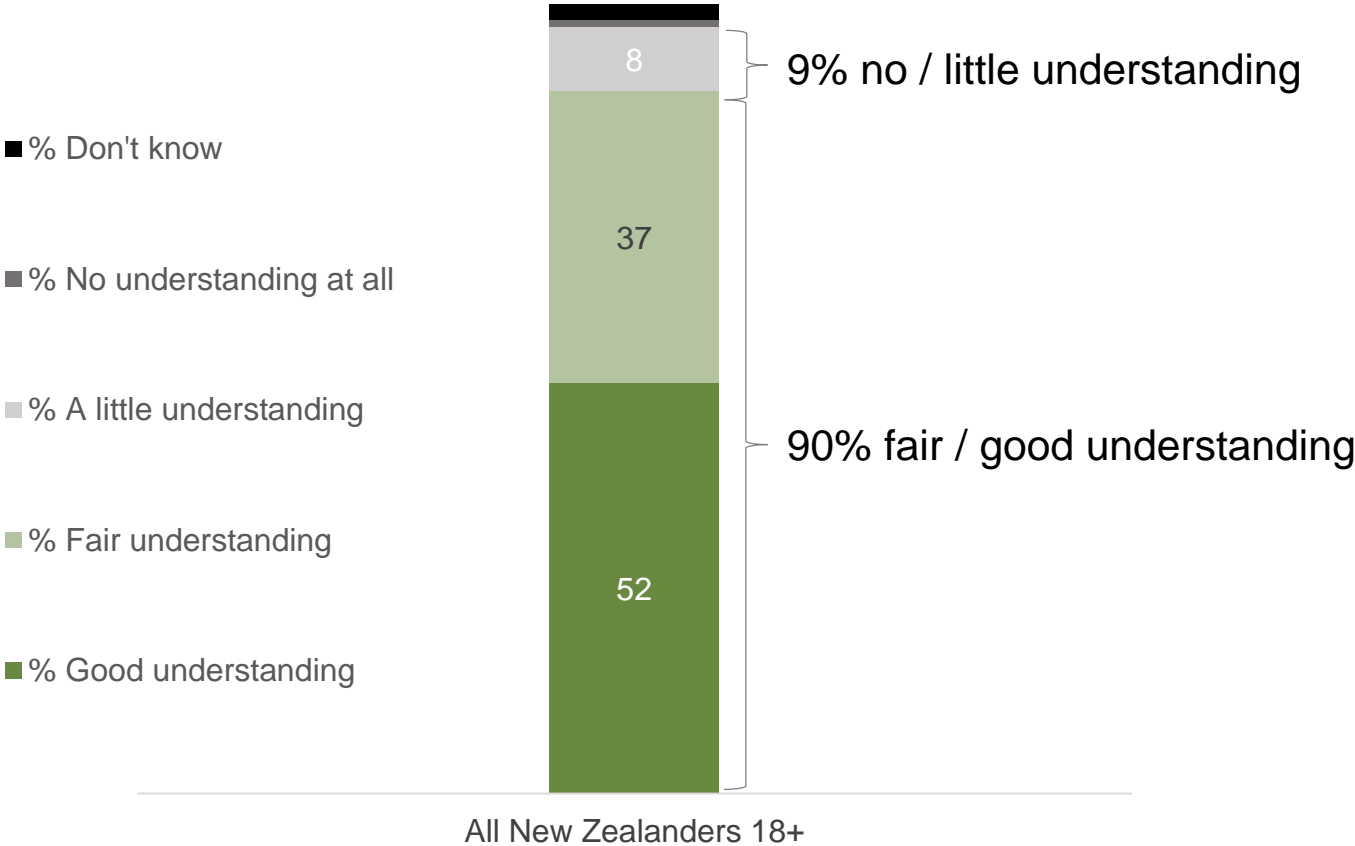
Men aged 30-49 are more likely than average to disagree (15% vs. 8% on average).

There are no other significant variations in opinion by demographic group.

Understanding of Level 3 restrictions



How would you rate your understanding of what you can and can't do under Alert Level 3 of the coronavirus alert system?



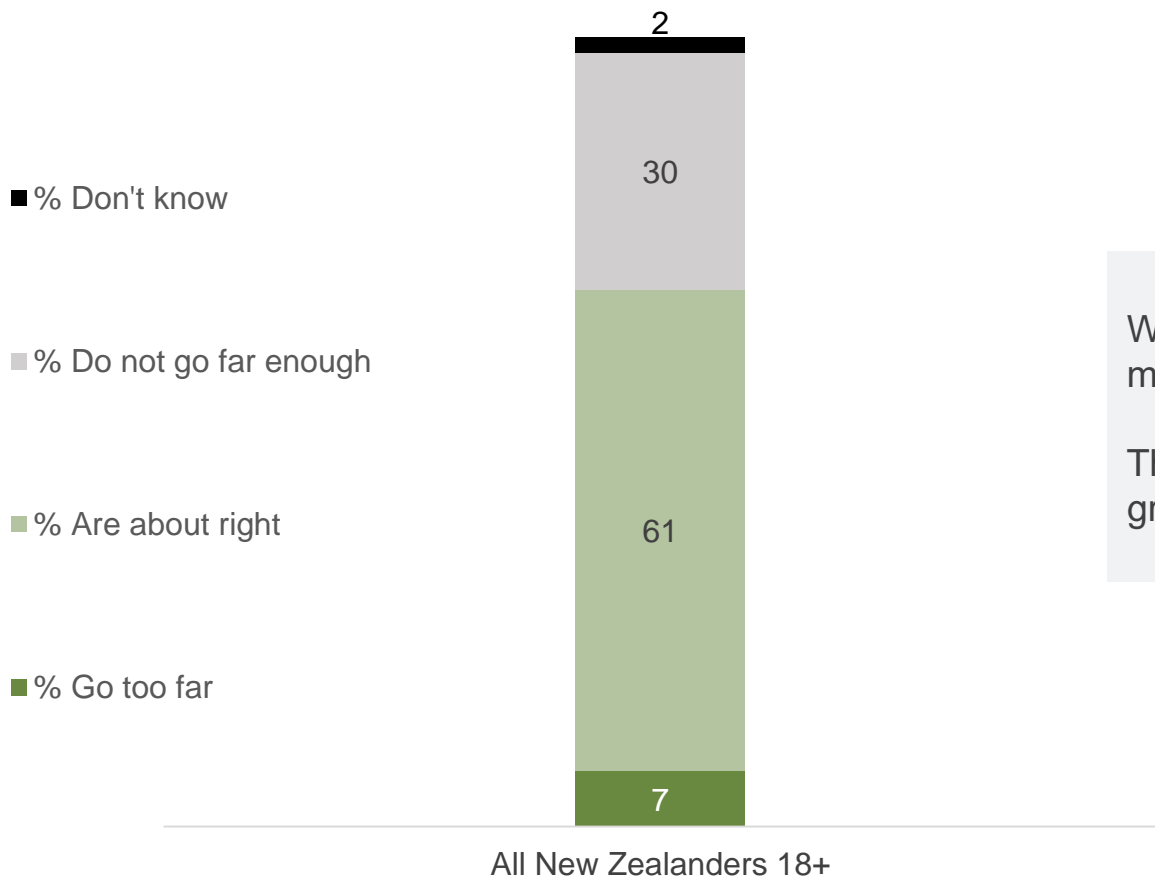
Women are more likely than men to say they have a 'fair' or 'good' understanding (94%, c.f. 84%).

Men aged 30-49 are more likely than average to say they have 'a little' or 'no understanding' (16%).

Perceptions of the enforcement measures



Do you think the enforcement of measures to control the coronavirus outbreak...?



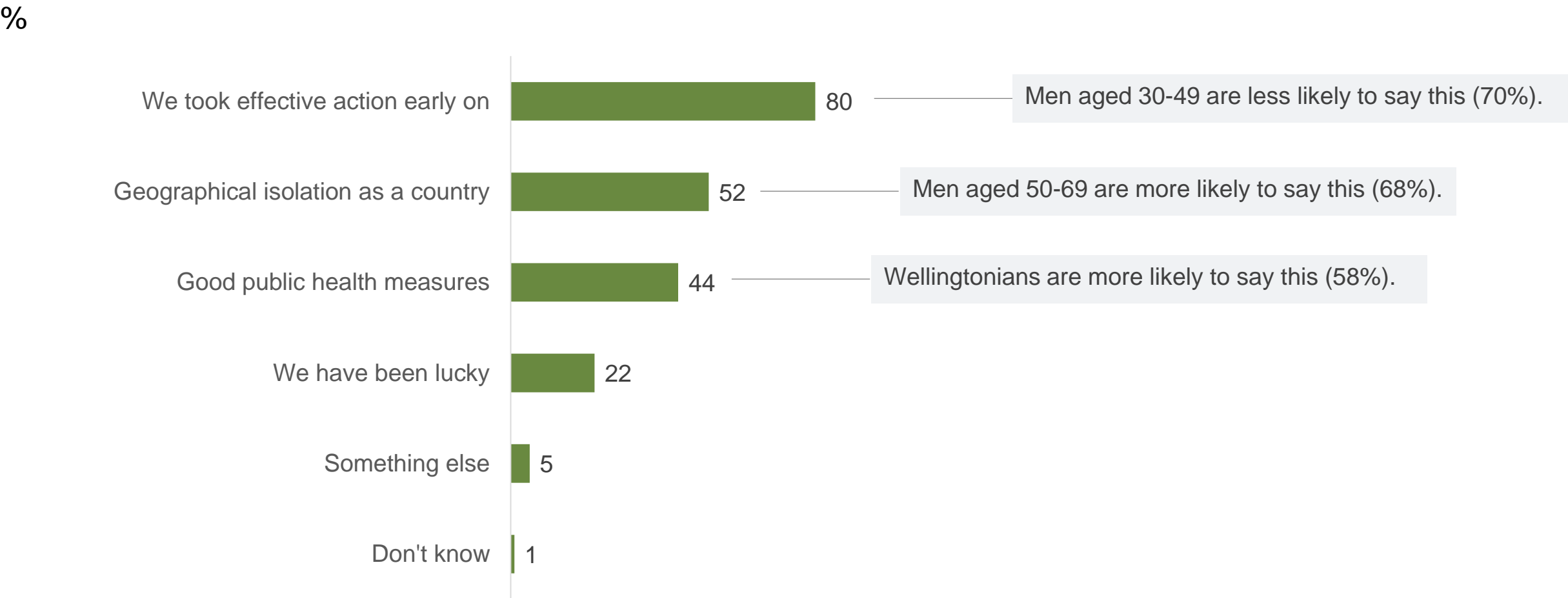
Women aged 18-49 are more likely than average to say the measures are 'about right' (78% vs. 61% on average).

There are no other significant variations in opinion by demographic group.

Perceived reasons for low level of coronavirus deaths in New Zealand compared to other countries



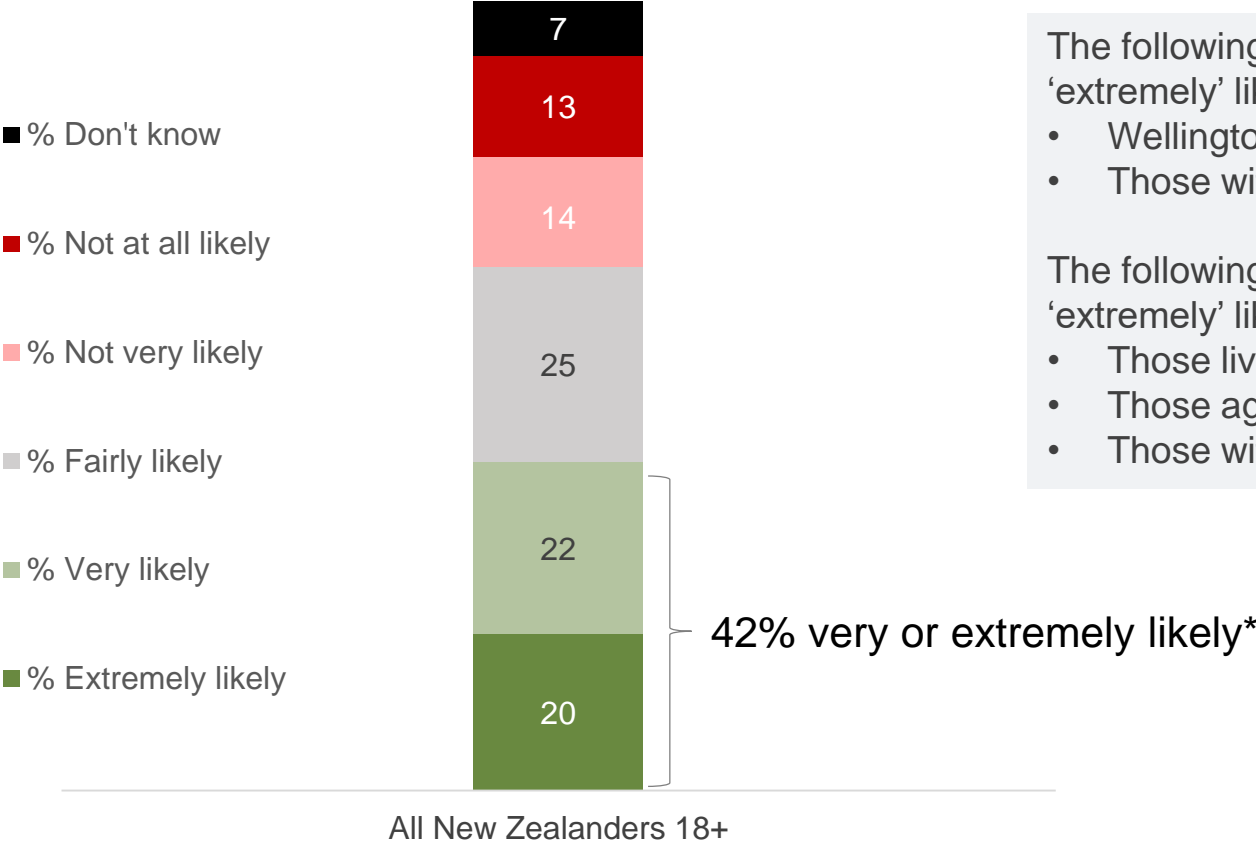
Compared to other nations with a similar population size, New Zealand has experienced relatively few deaths due to the coronavirus outbreak. Why do you think this is?



Likelihood to use a Government contact tracing app



How likely would you be to use a Government app which would gather data about you to help control the spread of the coronavirus outbreak? The data would be used to find people you had been in contact with, in case you were diagnosed with coronavirus.



The following groups are **more** likely than average to be 'very' or 'extremely' likely to use an app:

- Wellingtonians (57%)
- Those with a household income more than \$100,000 (55%)

The following groups are **less** likely than average to be 'very' or 'extremely' likely to use an app:

- Those living in rural areas (27%)
- Those aged 70 plus (29%)
- Those with a household income up to \$50,000 (31%)

Base: All New Zealanders 18+ (n=601)

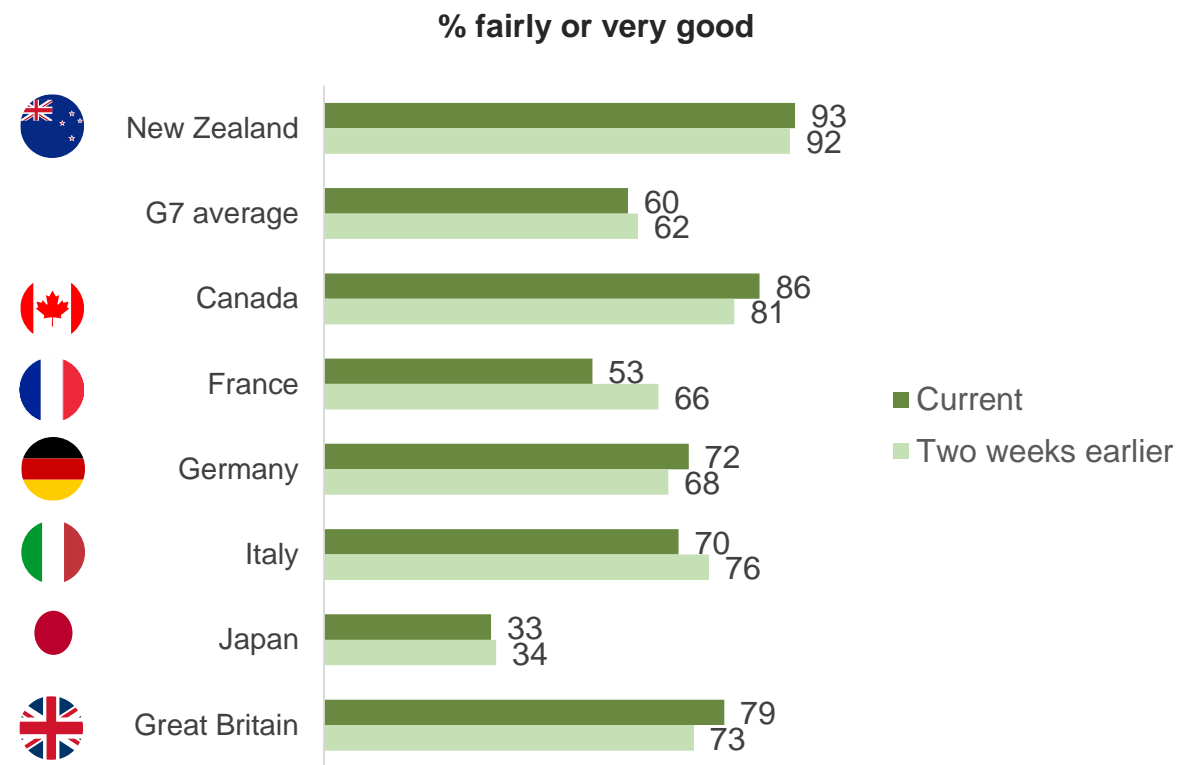
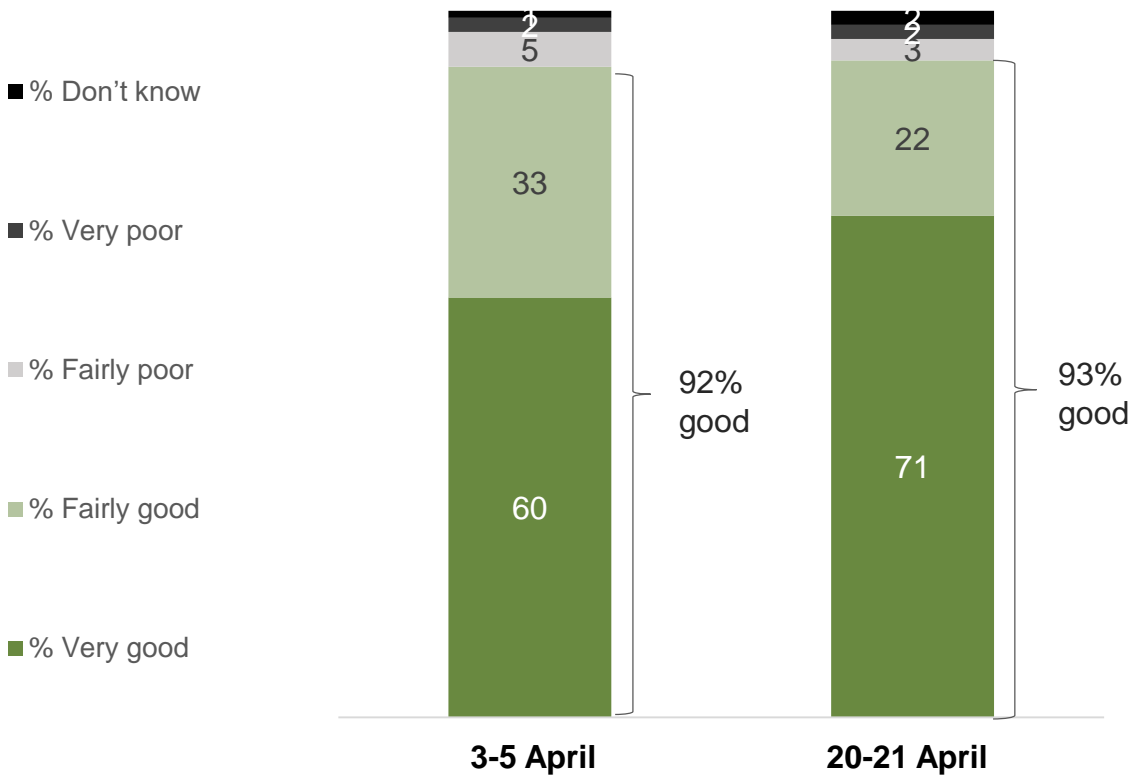
*In Colmar Brunton's experience of measuring service uptake, only those who report they will be 'very' or 'extremely' likely to use something may actually follow-through and use the service in reality (even then, the proportion who actually do so tends to be much lower than the proportion who report they would be likely to take something up).



Rating of Government communications



How would you rate [YOUR COUNTRY'S] Government on how it is communicating information about the coronavirus outbreak?

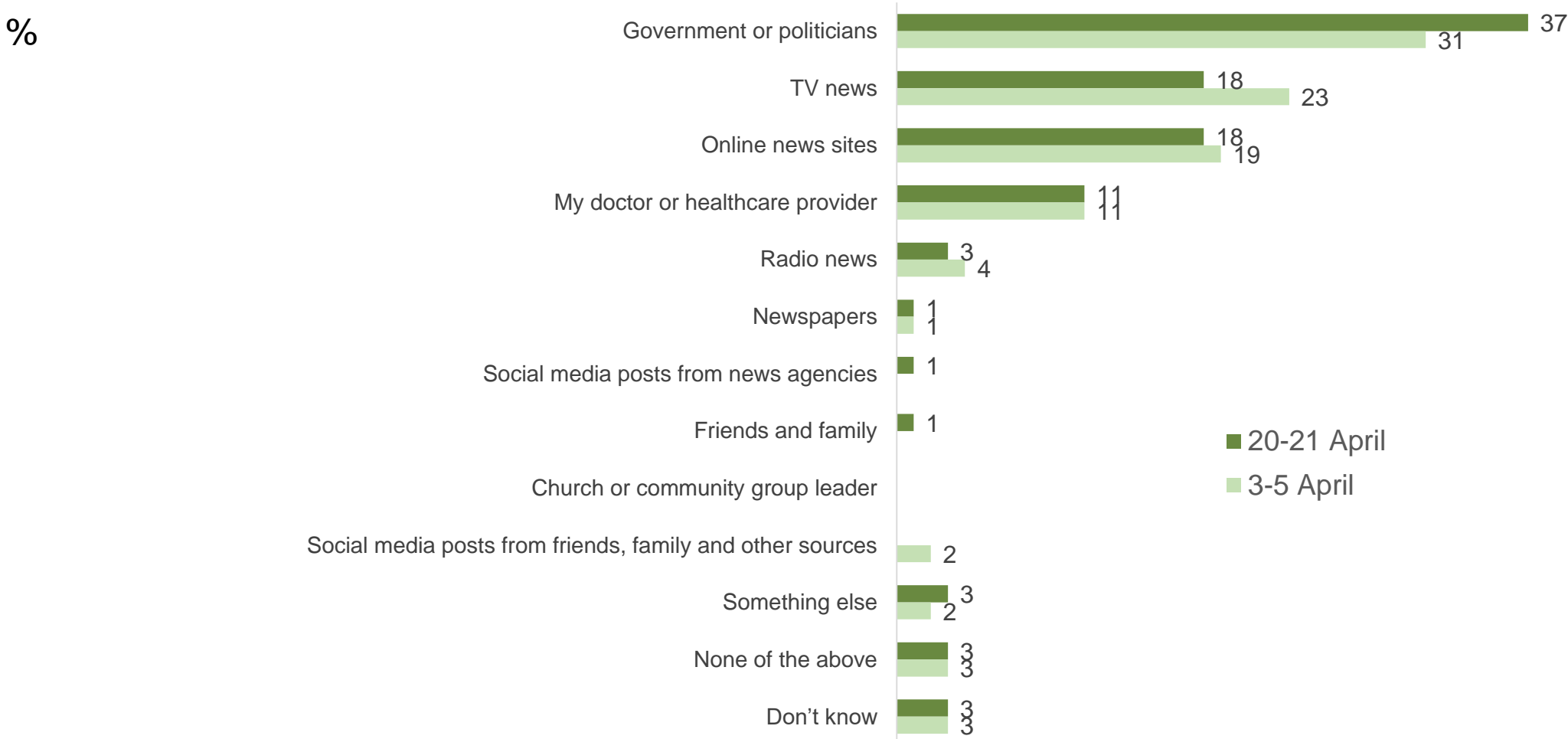


Base: All New Zealanders 18+ (n=601); G7 countries (n=1000 each)
Note: Question not asked in USA

Most reliable source of information



Which ONE of these do you trust the most to provide reliable information about the Coronavirus outbreak? (pick one)



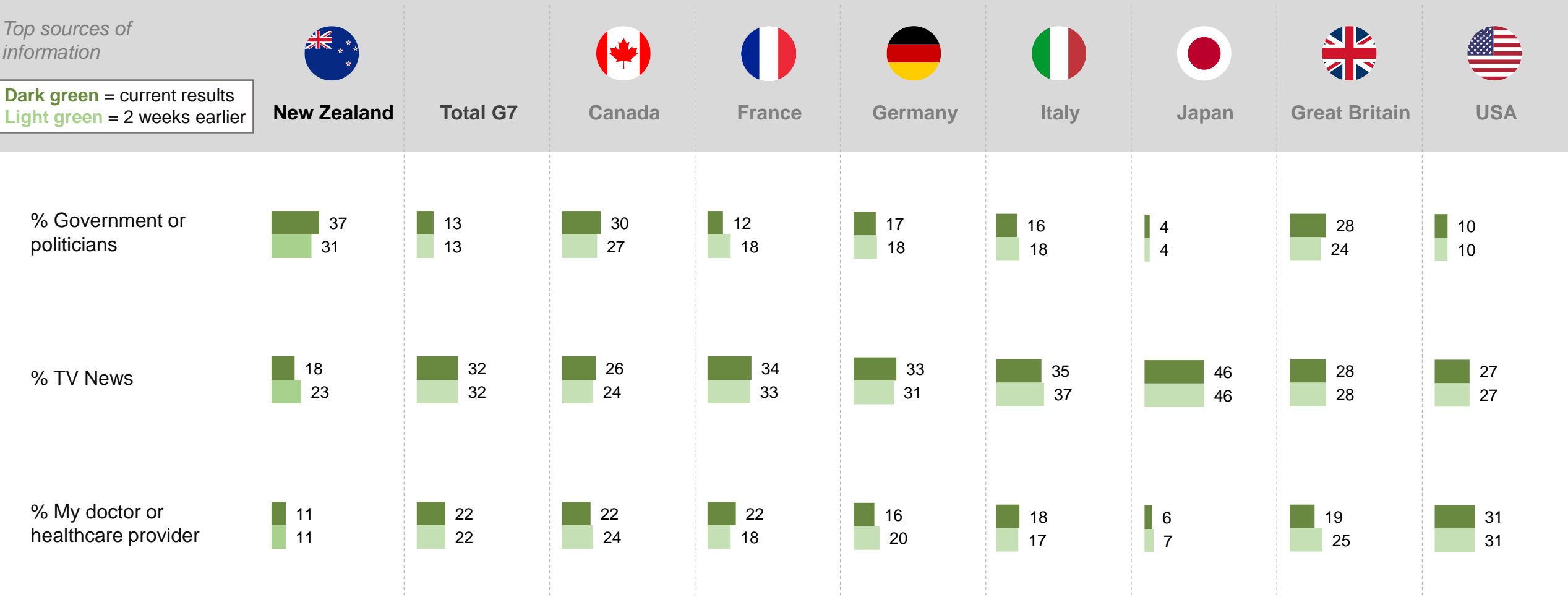
Most reliable source of information (comparisons to G7)



Which ONE of these do you trust the most to provide reliable information about the Coronavirus outbreak? (pick one)

Top sources of information

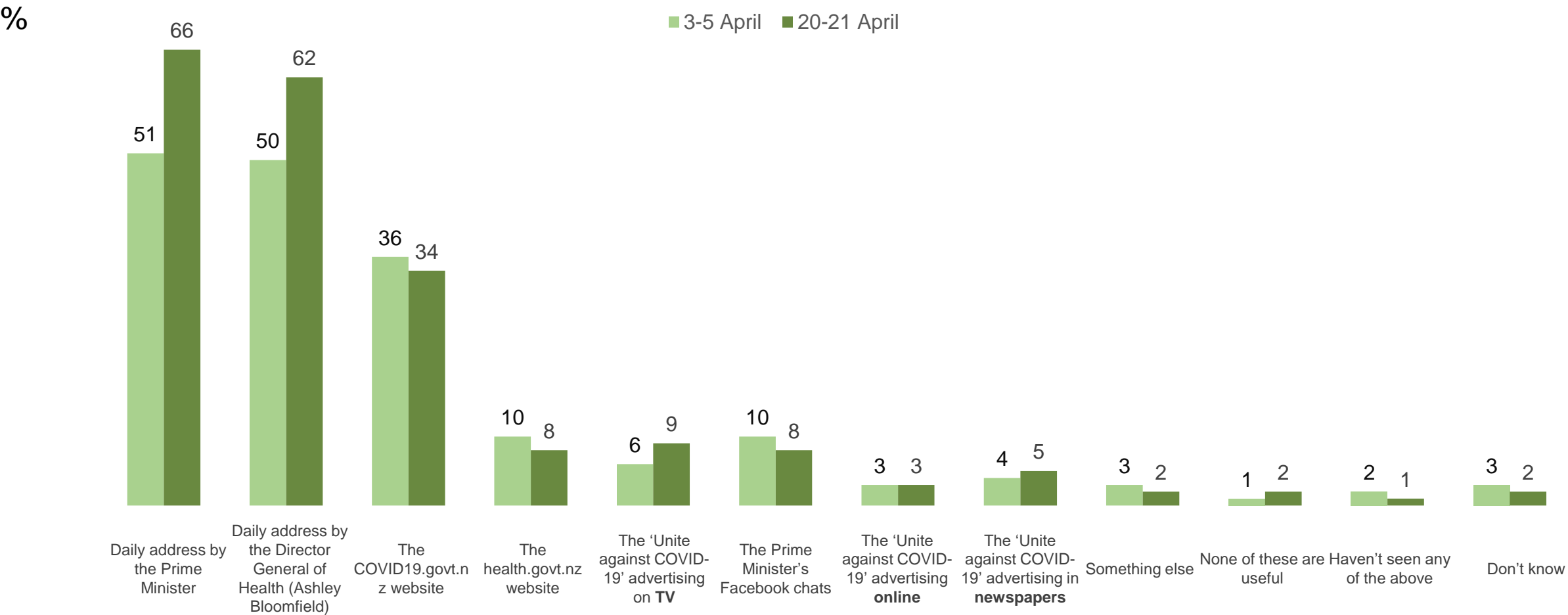
Dark green = current results
Light green = 2 weeks earlier



Most reliable source of government information



Which of these government sources have you found most useful? Please select up to three

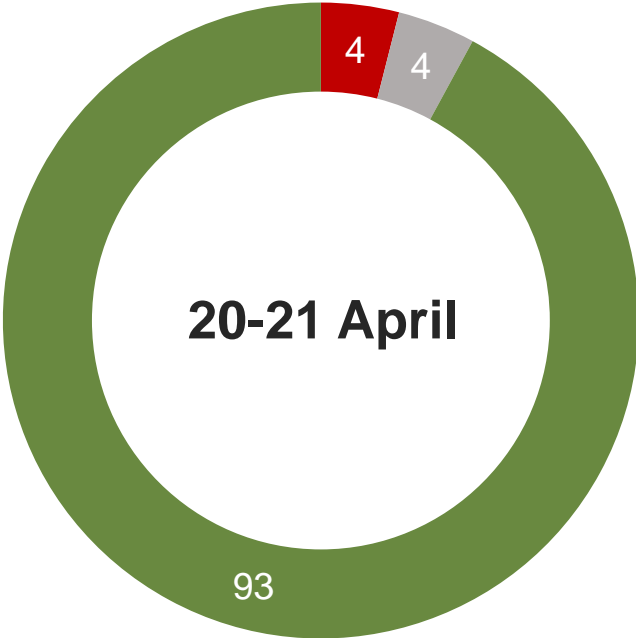
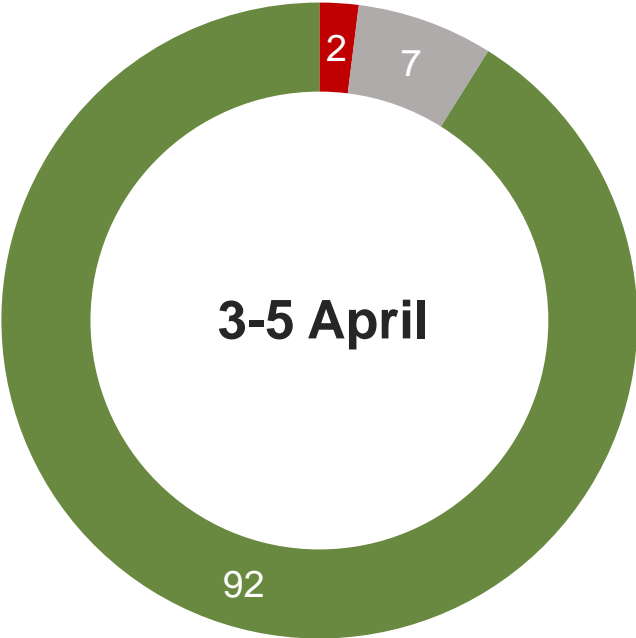




Self-reported compliance with the lock down



Thinking about all of the things the Government has asked New Zealanders to do to slow down the spread of the coronavirus, please give yourself a score between 0 and 10 for how consistently you do these things?



■ % scoring 0 to 5 ■ % scoring 6 to 7 ■ % scoring 8 to 10

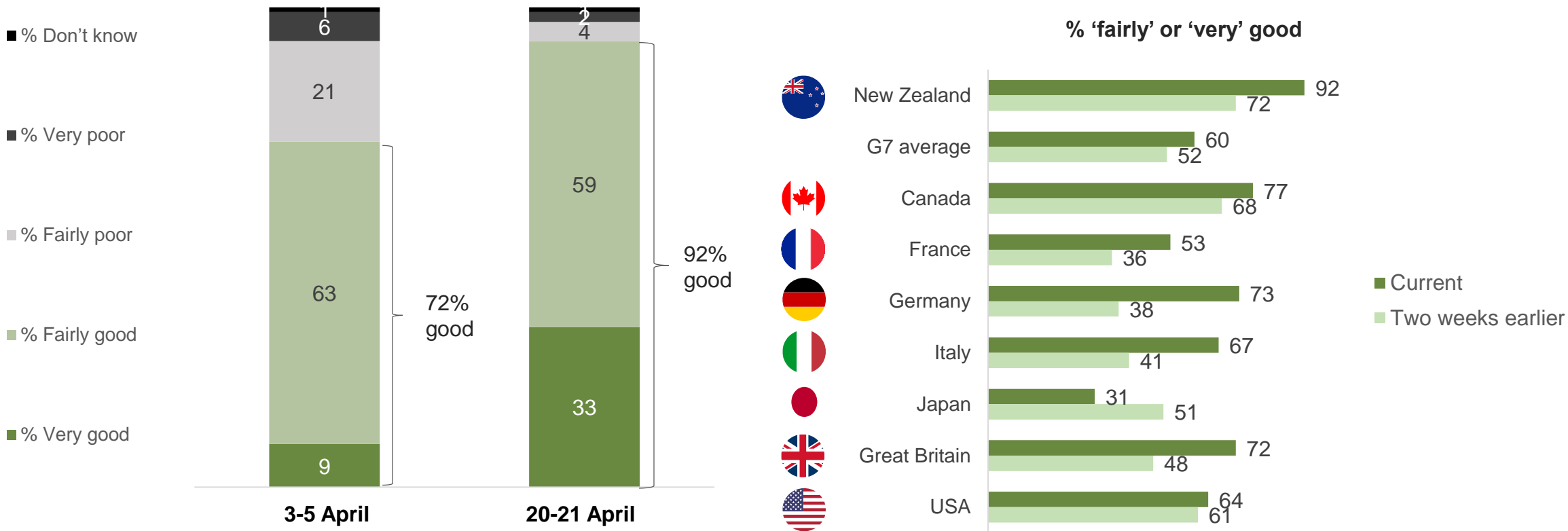
■ % scoring 0 to 5 ■ % scoring 6 to 7 ■ % scoring 8 to 10

0 = I never do what they ask; 10 = I always / consistently do what they ask

Perceptions of national behaviour



Overall, how would you rate the behaviour of [YOUR COUNTRY'S] citizens in the fight against the coronavirus outbreak?





Impact of COVID-19 on personal income



Thinking about your personal income, which one of these statements comes closest to your current situation?

% who selected
each option

Dark green = current results
Light green = 2 weeks earlier



New Zealand

Total G7



Canada



France



Germany



Italy



Japan

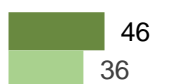
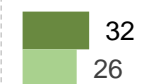
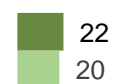
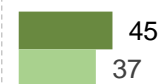
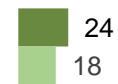
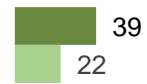
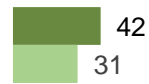
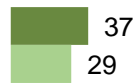
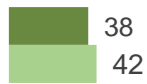


Great Britain

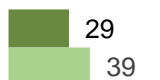
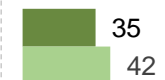
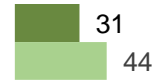
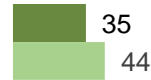
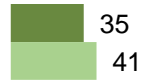
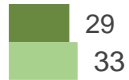


USA

Coronavirus has
already impacted my
personal income



Coronavirus has not yet
impacted my personal
income, but I **expect it**
to in future



% already or expect to:
(current)

67

72

77

69

58

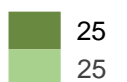
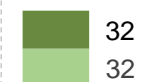
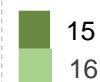
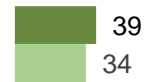
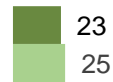
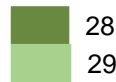
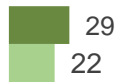
85

67

68

75

Coronavirus will have
no impact on my
personal income

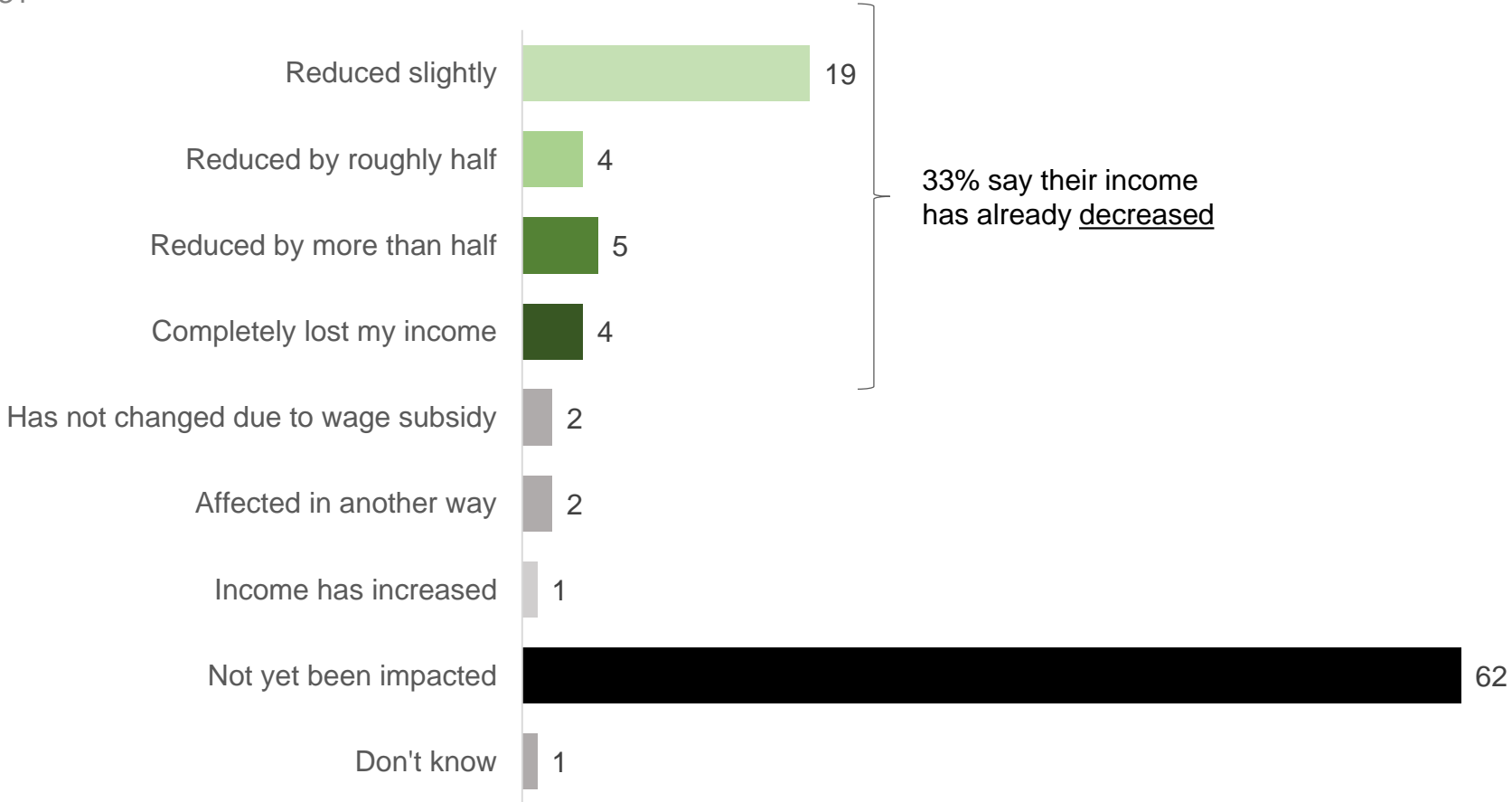


Severity of impact on personal income



Which of the following best describes how coronavirus has affected your personal income?

% of all New Zealanders 18+



Impact of COVID-19 on household income



Thinking about your personal income, which one of these statements comes closest to your current situation?

% who selected
each option

Dark green = current results
Light green = 2 weeks earlier



New Zealand

Total G7



Canada



France



Germany



Italy



Japan

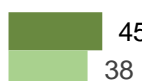
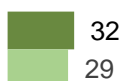
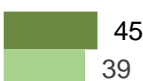
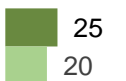
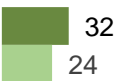
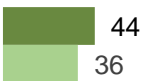
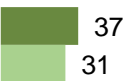


Great Britain

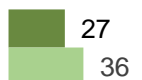
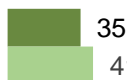
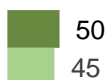
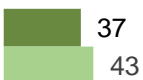
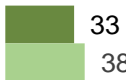
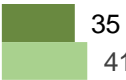
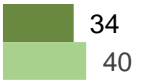
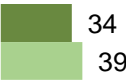
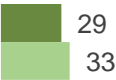


USA

Coronavirus has
already impacted my
household income



Coronavirus has not yet
impacted my household
income, but I **expect it**
to in future



% already or expect to:
(current)

72

71

78

67

58

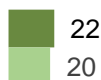
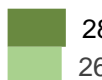
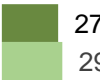
82

70

67

72

Coronavirus will have
no impact on my
household income

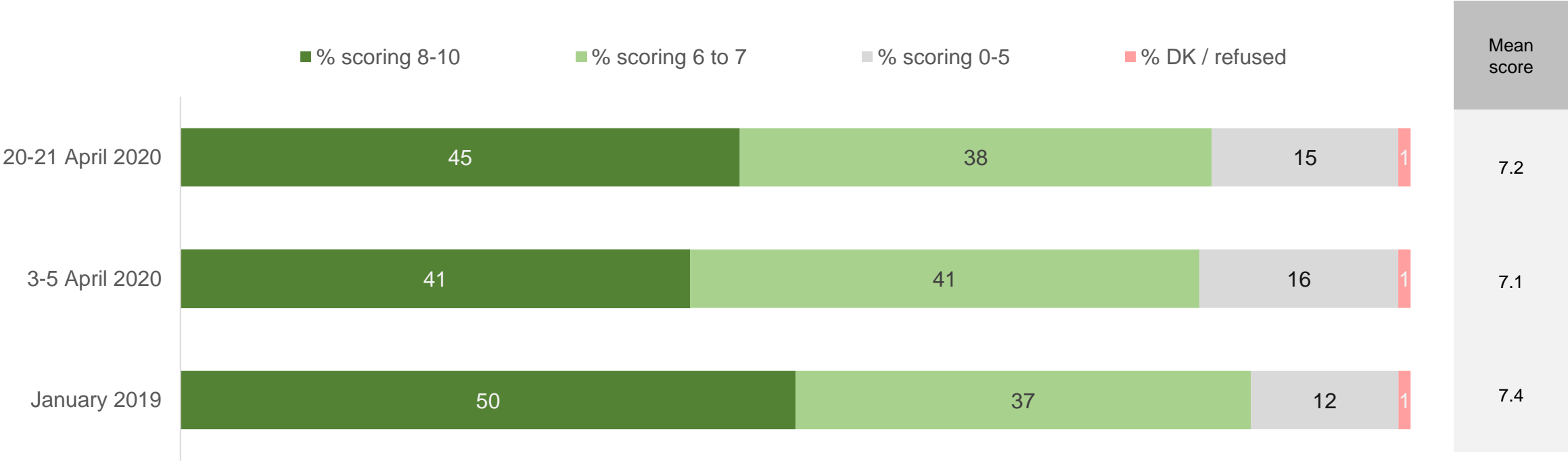


Impact on life satisfaction



Would you say you feel each of the following more or less than you typically did before the coronavirus outbreak?

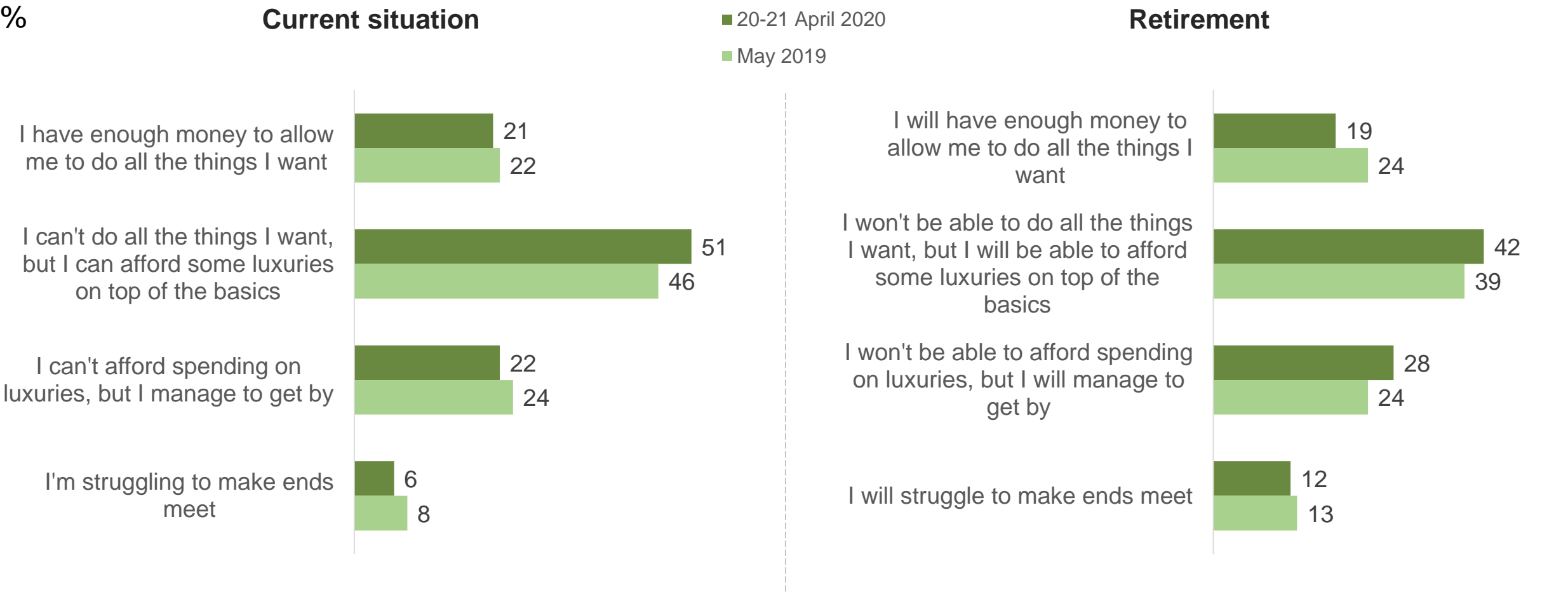
% of all New Zealanders 18+



Wealth now and in retirement compared to pre-COVID



Which of these statements best describes your lifestyle / the retirement lifestyle you're likely to have?



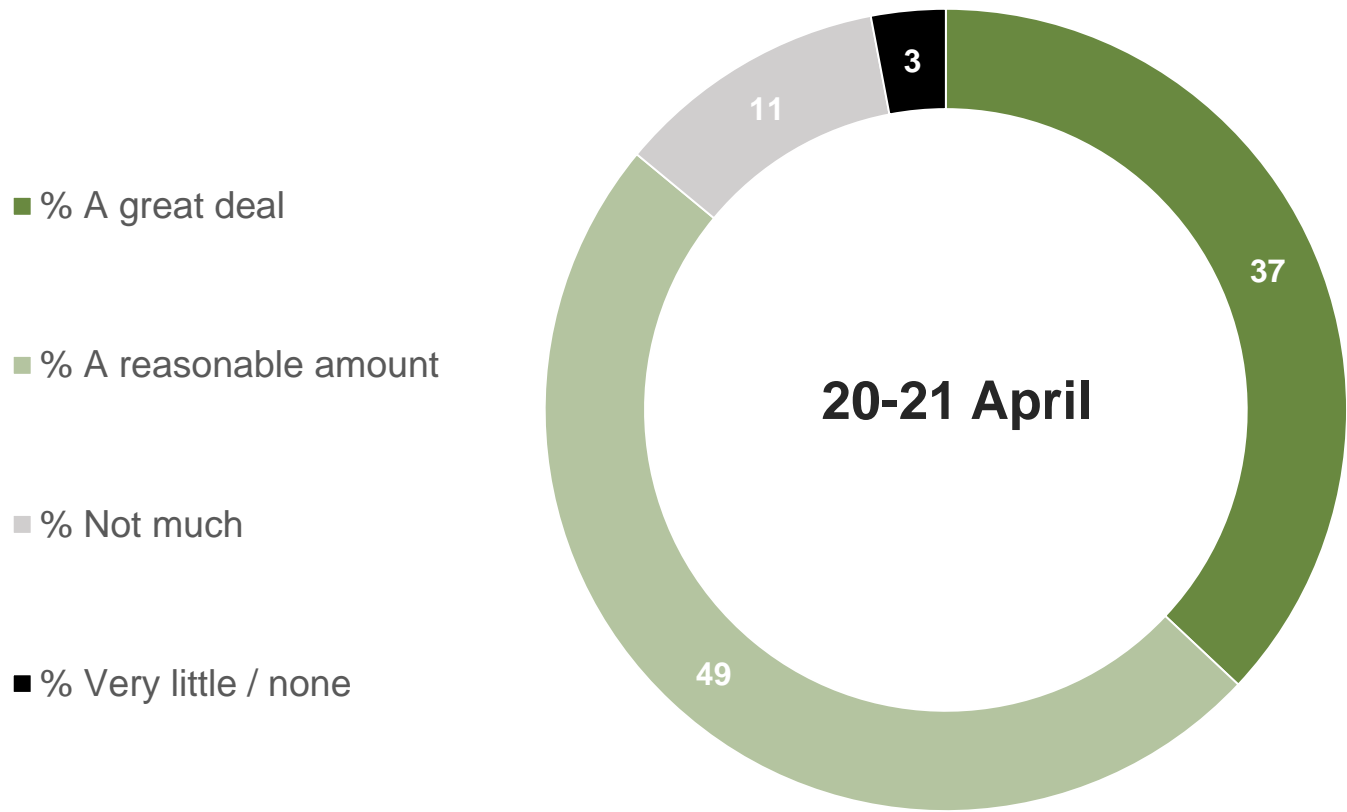
Base: All New Zealanders 18+ (n 20-21 April=601; n May 2019=2,101)
Data for May 2019 is sourced from the State of the Investor Nation survey conducted for KiwiWealth.



Trust in the Government



How much trust do you have in the Government to deal successfully with national problems?



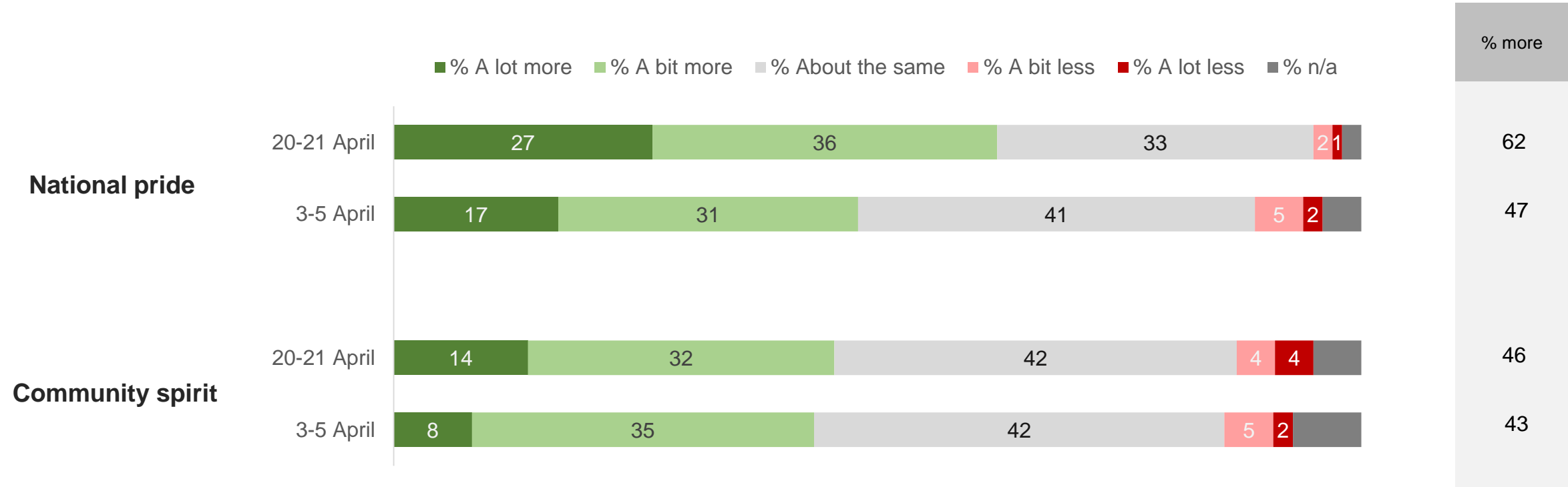
'A great deal' or 'a reasonable amount' of trust in the Government:		
86%	83%	59%
20-21 April	3-5 April	Pre-crisis*

National pride and community spirit



Would you say you feel each of the following more or less than you typically did before the coronavirus outbreak?

% of all New Zealanders 18+





How we intend to change our behaviour compared to pre-COVID times



We'd now like you to think about life after lockdown. Please imagine all restrictions on travel and gatherings have been lifted. Once life has returned to 'normal', which of the following do you think you will do more or less of compared to before the coronavirus outbreak?

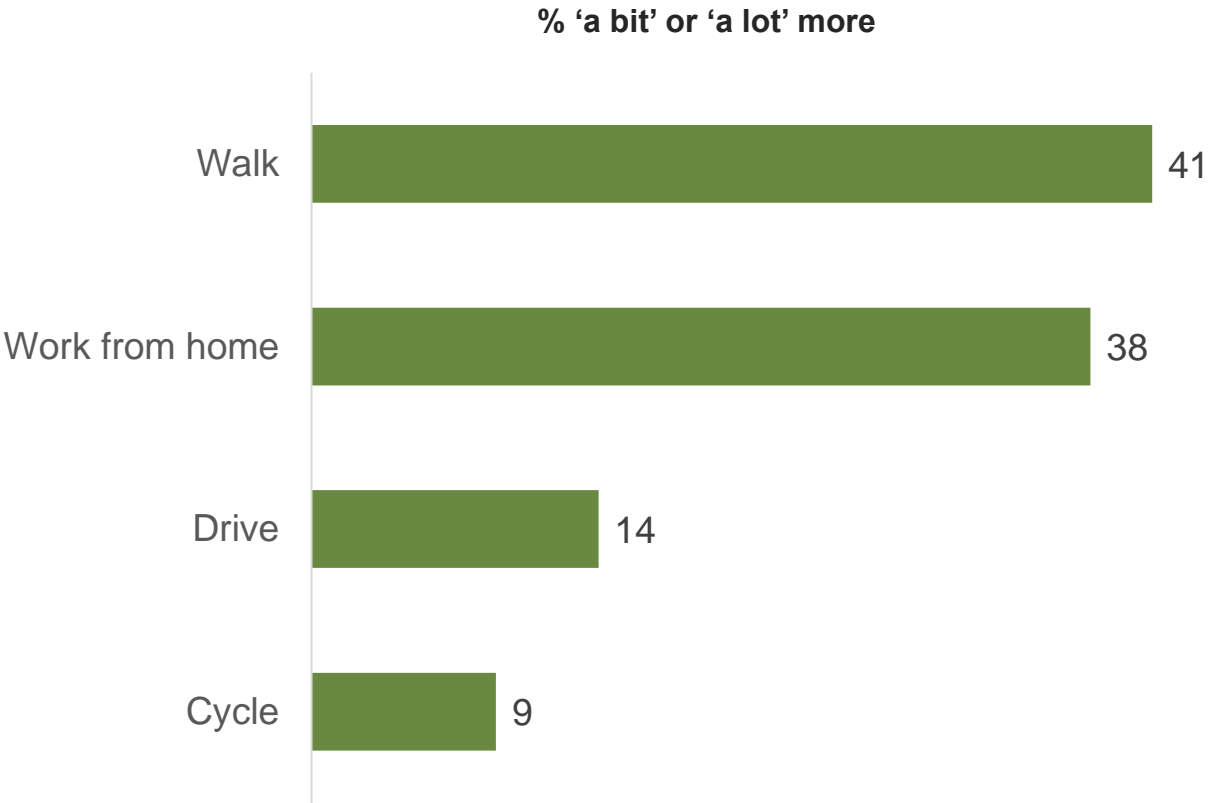


Habits among those who say they will use public transport less



We'd now like you to think about life after lockdown. Please imagine all restrictions on travel and gatherings have been lifted. Once life has returned to 'normal', which of the following do you think you will do more or less of compared to before the coronavirus outbreak?

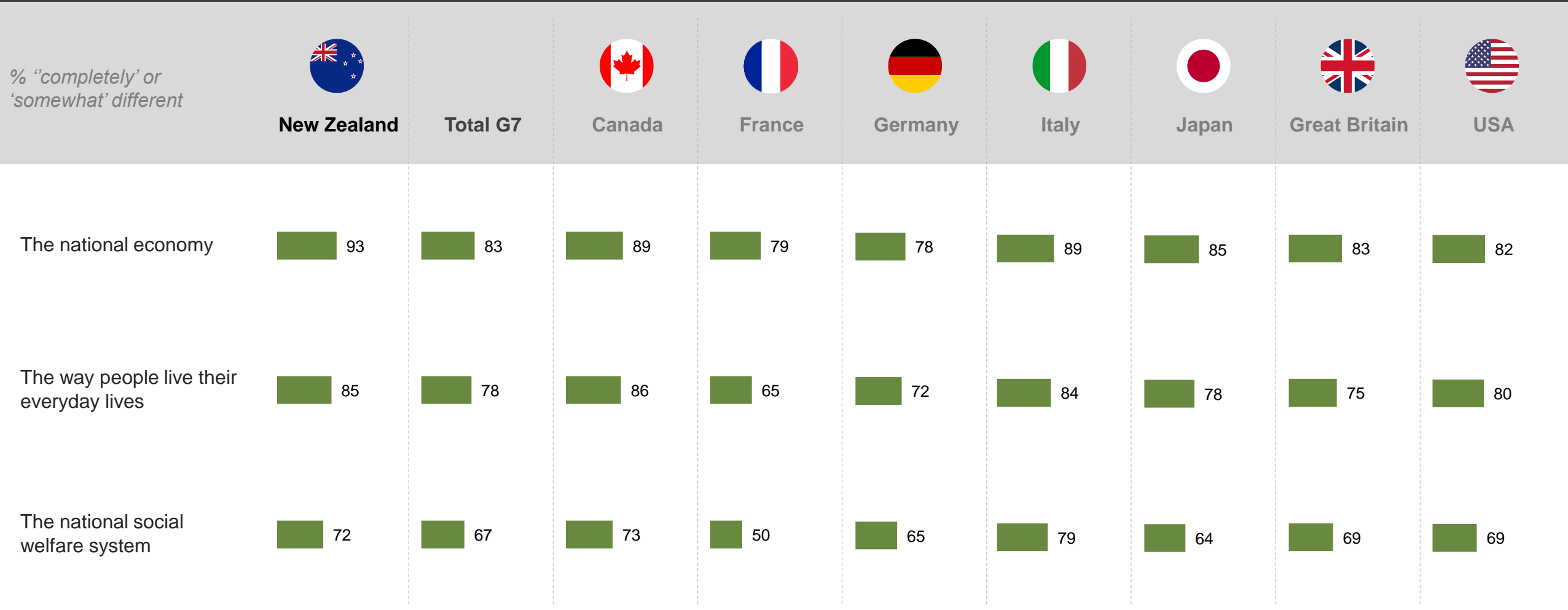
%



What COVID will change when the crisis is over



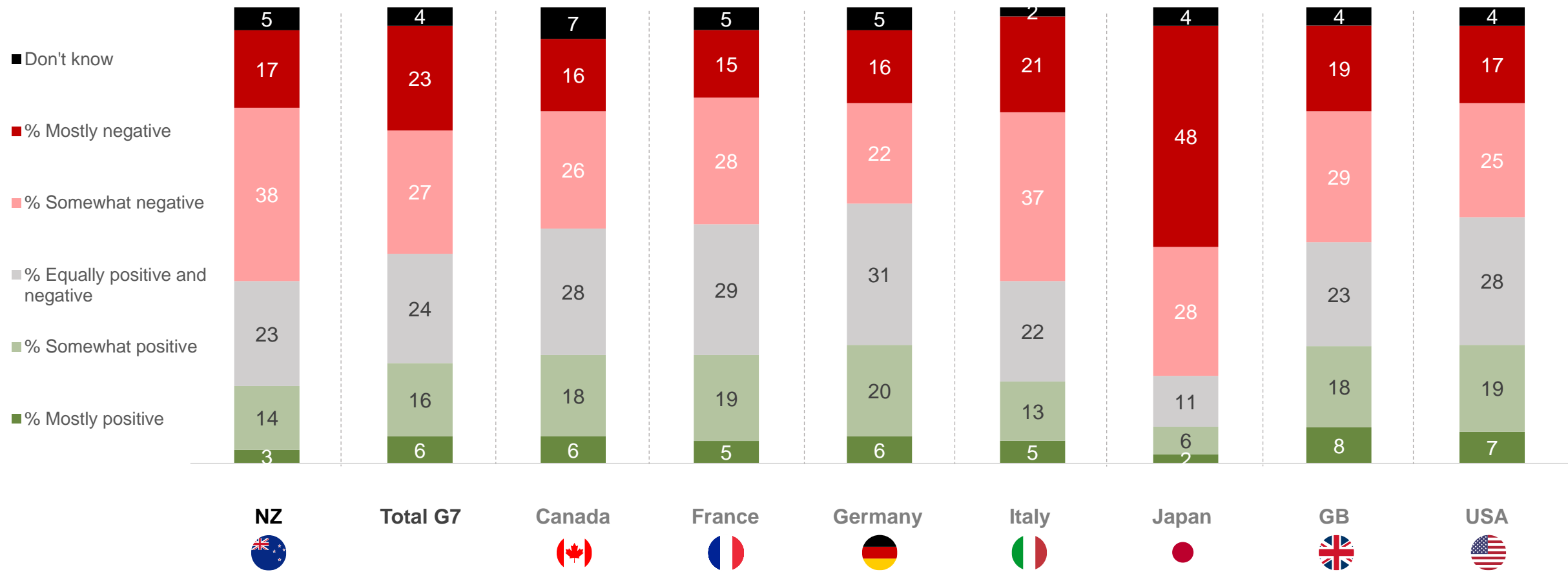
Now thinking about when the coronavirus outbreak is over, to what extent do you feel that [YOUR COUNTRY] will be different to how it is now?



Whether change in the national economy will be positive or negative (among those who think it will change)



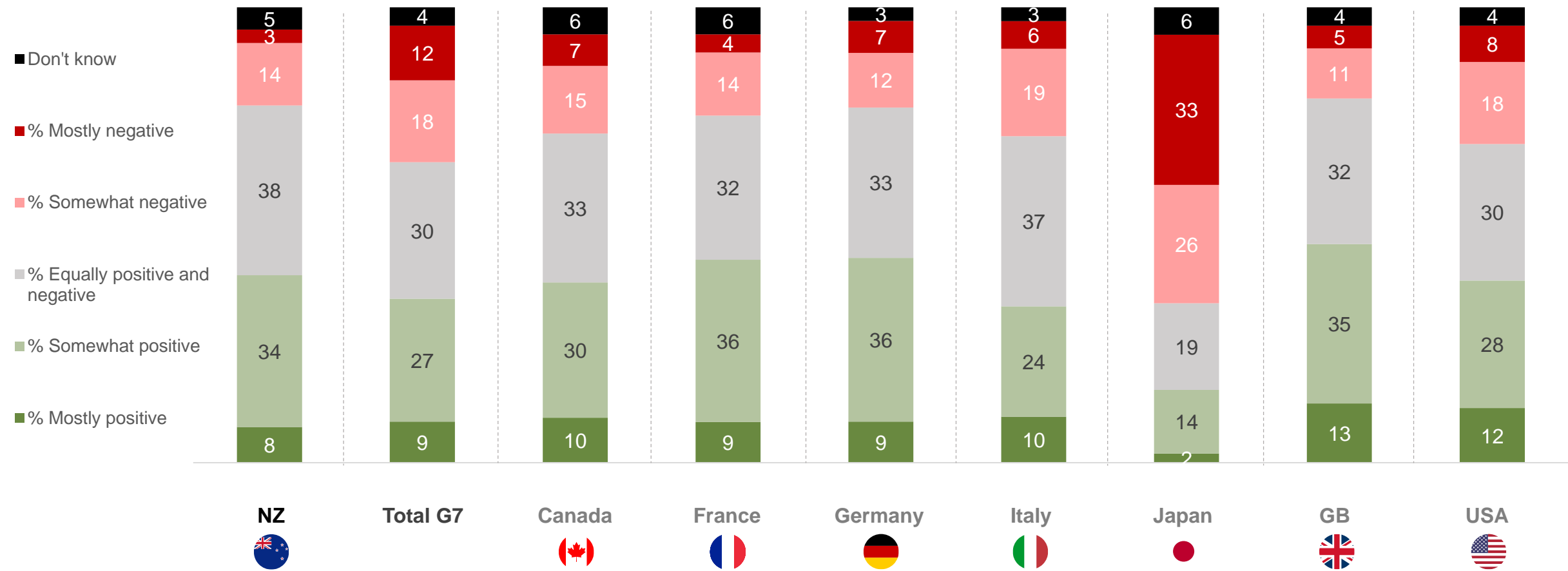
Which of these comes closest to your view on how [YOUR COUNTRY'S] Government is responding to the coronavirus outbreak?



Whether change in the way people live their everyday lives will be positive or negative (among those who think it will change)



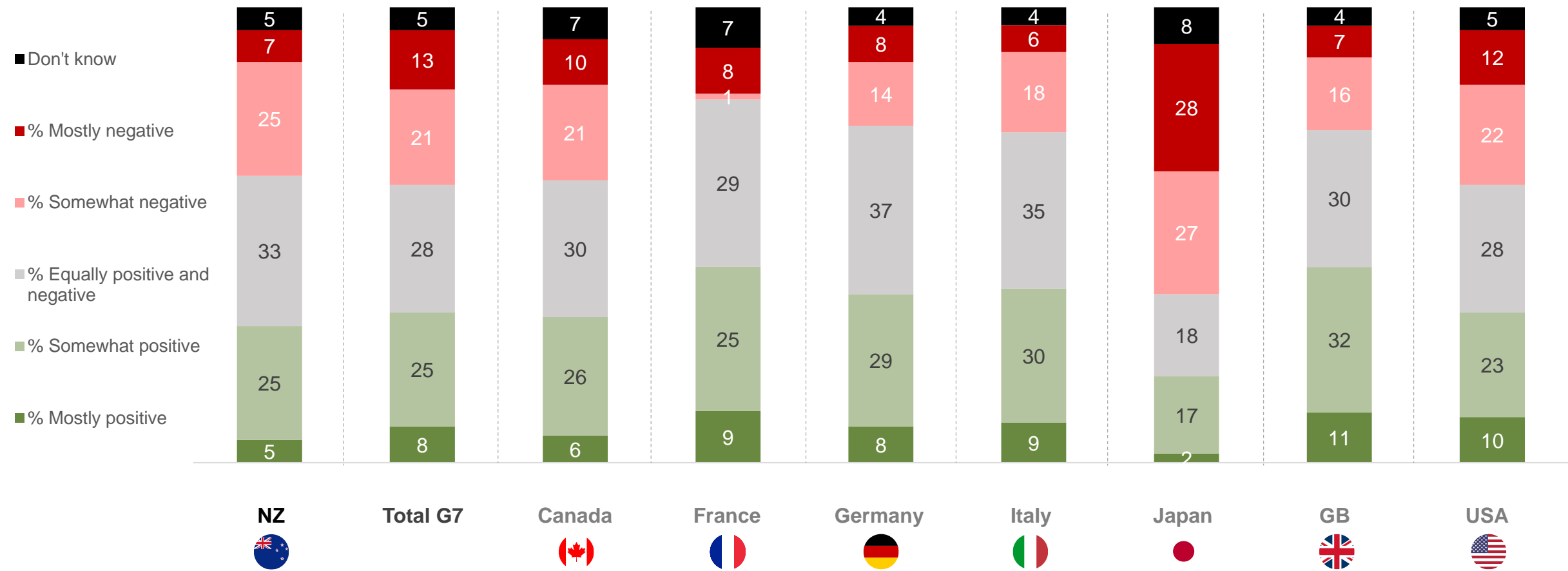
Which of these comes closest to your view on how [YOUR COUNTRY'S] Government is responding to the coronavirus outbreak?



Whether change in the national social welfare system will be positive or negative (among those who think it will change)



Which of these comes closest to your view on how [YOUR COUNTRY'S] Government is responding to the coronavirus outbreak?



Base: Those who think it will change (n=560); G7 countries (n=800-900 each)

Questions?

FOR FURTHER INFORMATION PLEASE CONTACT

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