



**FORWARD**

Friday 10 April 2020

# NZ Wellbeing, during week 1 & 2 in lockdown

DATE COLLECTION PERIOD: 27/03/2020 TO 10/04/2020



# Introduction.



## Objective

During difficult times it's important to protect the wellbeing of our people. FORWARD is running weekly surveys to understand how wellbeing is impacted by the COVID-19 pandemic.

The information we collect, will help organisations make better decisions to respond to the potential deterioration of wellbeing driven by lockdowns and social distancing measures.

## Measures Of Wellbeing

The metrics we track in this study cover:

Overall satisfaction of life, Physical health, Emotions, mood and mindset, Daily activities, Community engagement and Financial stress

## Methodology

N=300+ per week across New Zealand – NZ pop representative.

We are being supported on this tracking project by leading market research technology platform, [Cint](#), who have sourced sample from their Insights Exchange of [100+ million globally](#) across 150 countries.

Weighting: population representative.

## Benchmarking

Where possible, the result will be benchmarked against wellbeing statistics from the New Zealand General Social Survey (NZGSS).

The latest wellbeing statistics from New Zealand General Social Survey (NZGSS) are from 2018, with approximately 8,000 samples across New Zealand.



# Wellbeing Status Summary 10-4-20

## Satisfaction with life is decreasing

People are increasingly feeling isolated, but also bored, lonely and even annoyed and frustrated, after 2 weeks in lockdown.

In week 2, compared to week 1, more New Zealanders are feeling less connected with the community, their neighbours, friends and family.

Around 30% of all respondents claimed that emotional problems, such as depression or anxiety, interfere with their regular activities at least some of the times.

Most people do not know anyone directly affected by Covid19 and feel as healthy as they were before lockdown.

29% of all New Zealanders claim to be in a worse financial situation each week.

Compared to week 1, in week 2 fewer New Zealanders are enjoying getting outside, nature, enjoyable meals, movies, reading and gaming.



# How is NZ feeling?

After 2 weeks of level-4 Covid19 lockdown

Week 1 - Lockdown (27/03/20 to 3/4/20)

Week 2 - Lockdown (4/4/20 to 10/4/20)



# Overall satisfaction with life

## In week 2, compared to week 1 in lockdown, satisfaction with life is dropping

Satisfaction with life during lockdown is slowly decreasing: 68% of the respondents rated their overall life satisfaction as 7 or above on a 0–10 scale (where 0 is low and 10 is high), with an average rating of 6.8, significantly lower than the 7.2 average rating received in the same survey last week.

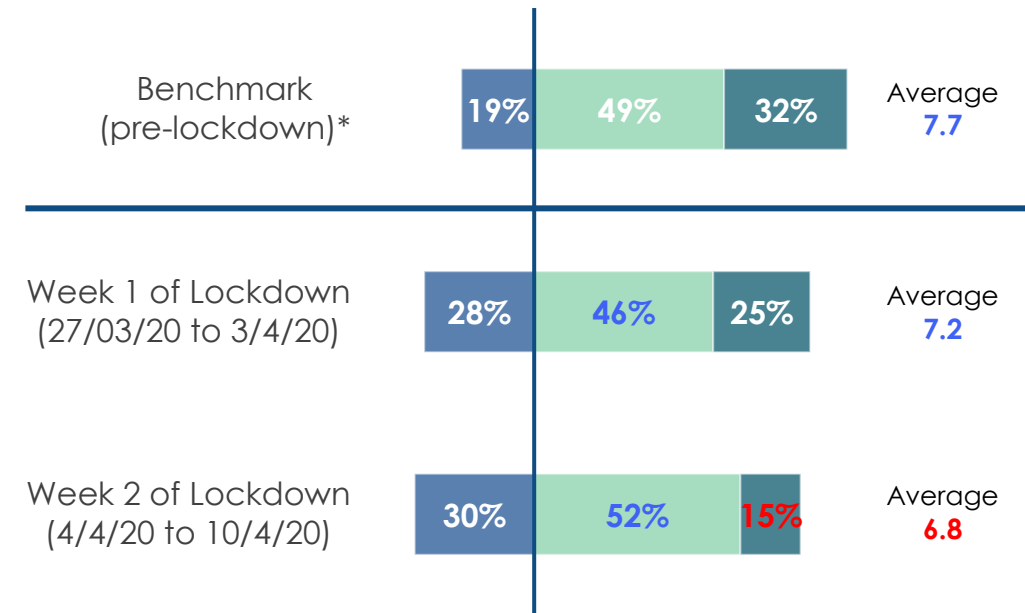
Across both weeks 1 and 2 life, satisfaction is rated lower than life satisfaction outside lockdown, when benchmarked against the New Zealand General Social Survey 2018 dataset.

\* Well-being statistics from New Zealand General Social Survey 2018 (NZGSS); the exact question is used in our weekly survey for benchmarking.

Q: In general, including all areas of your life, how satisfied do you feel about your life as a whole?  
10=completely satisfied, 0=completely dissatisfied

## Overall satisfaction about your life as a whole

■ 0 to 6 ■ 7 to 8 ■ 9 to 10



(% of "I don't know" is not shown in the chart)

**Blue** values = significantly higher than average (95% degree of confidence)  
**Red** values = significantly lower than average (95% degree of confidence)

Sample size: n=387 for week 1, n=328 for week 2  
Population representative weighting for each week



# Overall satisfaction with life

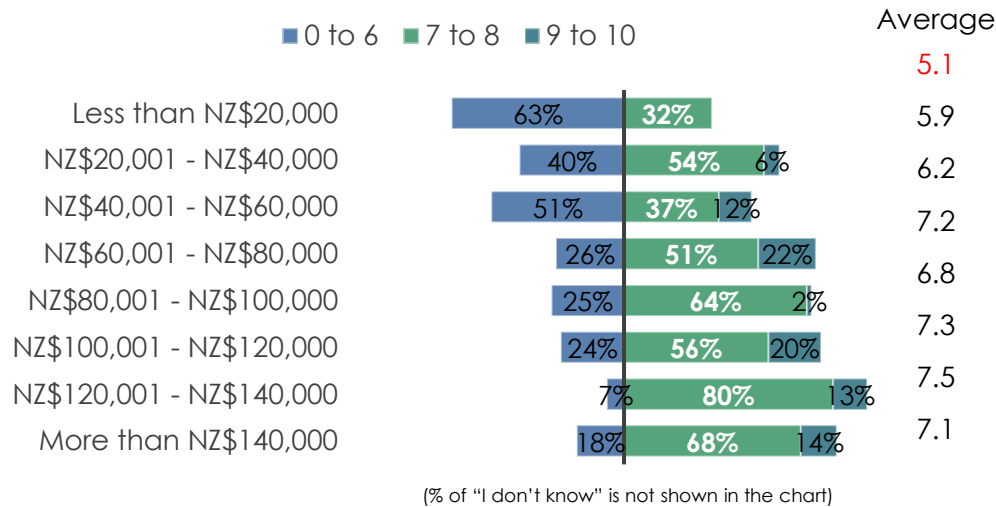
## Satisfaction with life is linked to income and age

The overall satisfaction of life is lower in low income groups and among young respondents. There is no statistically significant differences between different ethnicity groups.

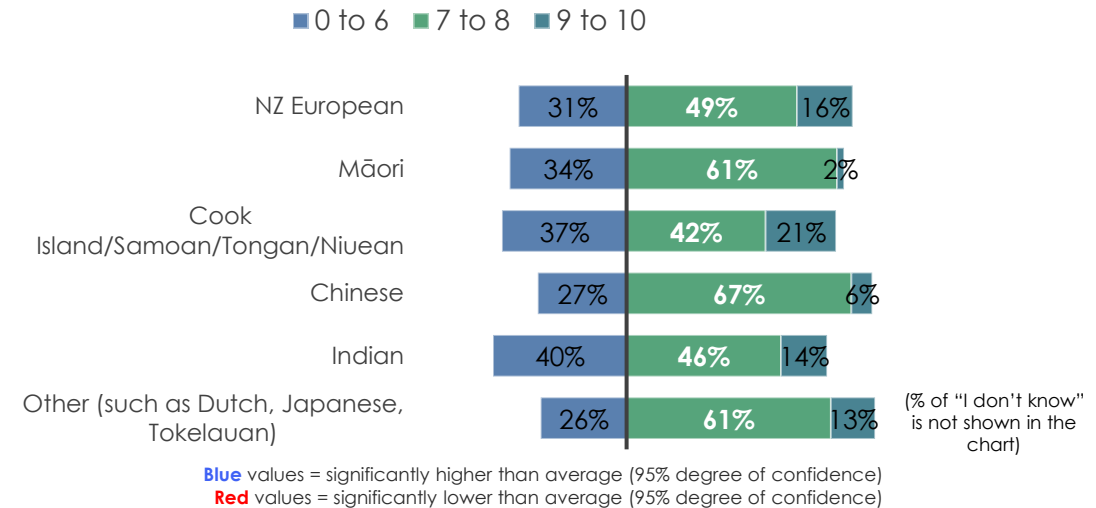
## Overall satisfaction about your life as a whole by age

18-34 years Average: **6.2**      35-64 years Average: 6.8      65+ years Average: 7.6

## Overall satisfaction about your life as a whole by income



## Overall satisfaction about your life as a whole by ethnicity





# How is NZ feeling

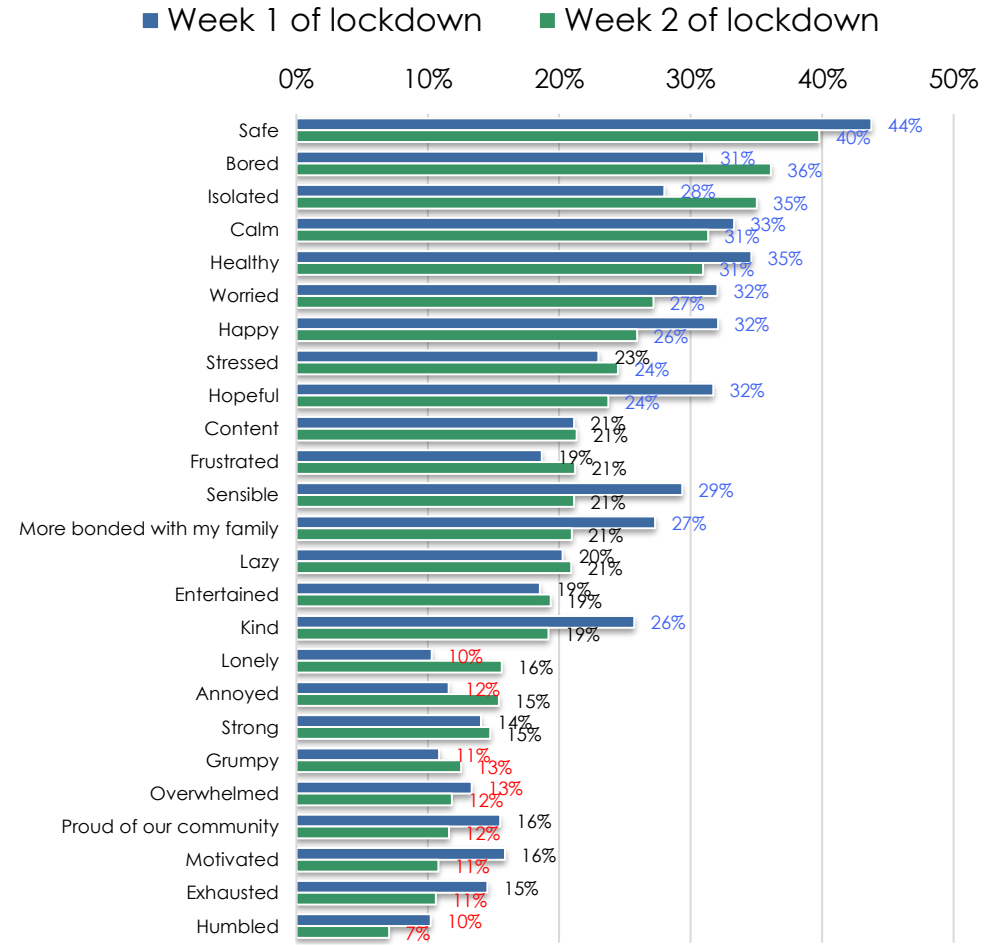
**In week 2 New Zealanders are mainly feeling safe, bored, isolated, yet calm and healthy, but worried.**

We observe significant change compared to week 1 – as highlighted in the following slide.

Sample size: n=387 for week 1, n=328 for week 2  
Population representative weighting for each week

Q: How are things in your home lately? How are people feeling?

## How are things in your home lately? How are people feeling?



Blue values = significantly higher than average (95% degree of confidence)  
Red values = significantly lower than average (95% degree of confidence)



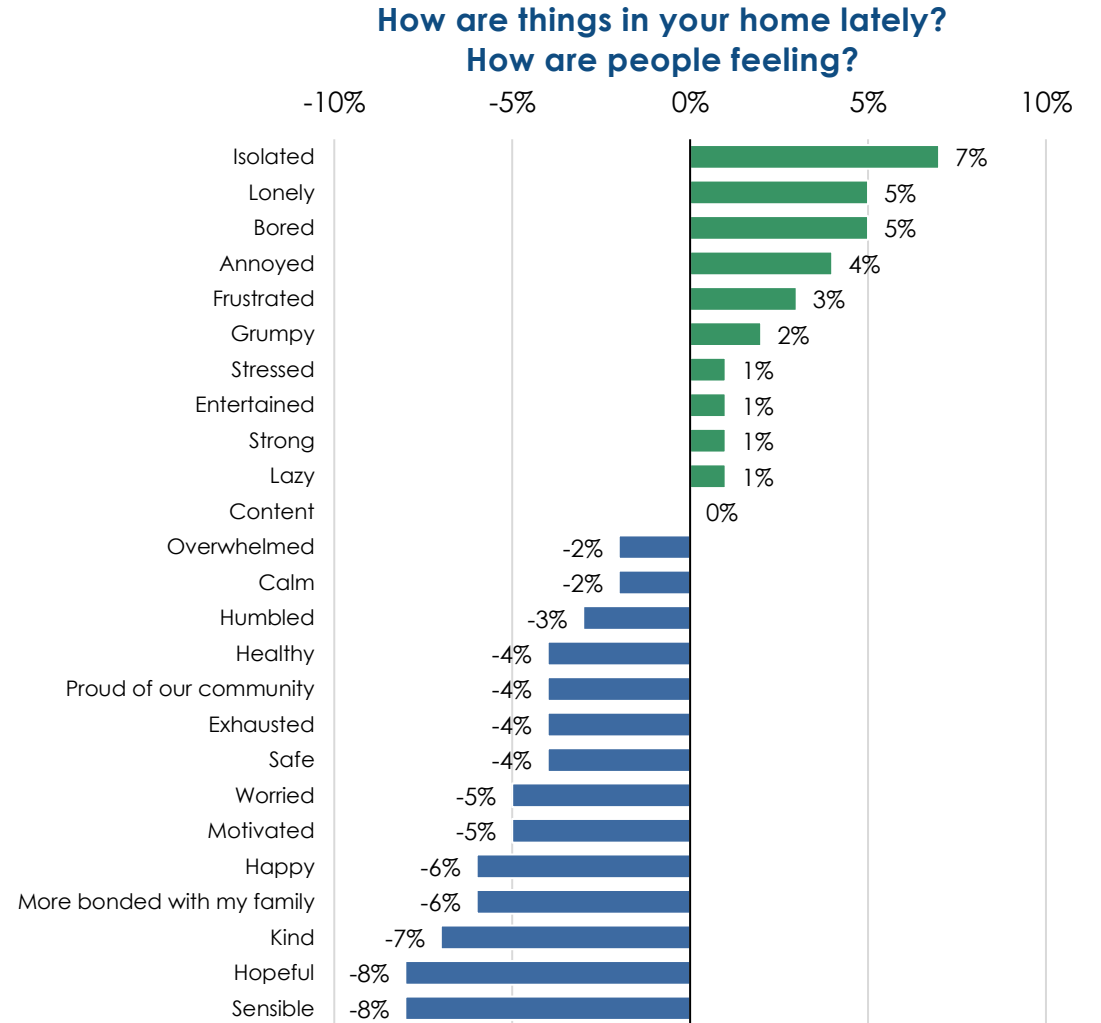
# How is NZ feeling in week 2 vs week 1

People are increasingly feeling isolated but also bored, lonely and even annoyed and frustrated, after 2 weeks in lockdown.

Less and less people are experiencing positive feelings/mindsets (hopeful, happy, safe etc.) which is a sign of wellbeing deterioration.

The greatest weekly shift is in how more New Zealanders are starting to lose hope and feel less sensible about the current situation.

Q: How are things in your home lately? How are people feeling?



Sample size: n=387 for week 1, n=328 for week 2  
Population representative weighting for each week





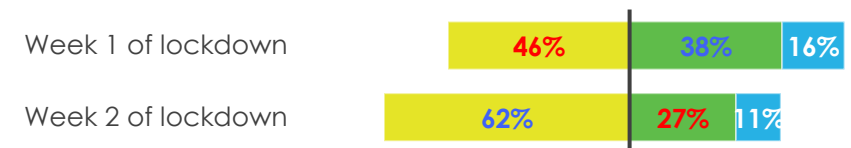
# Sense of community

In week 2, compared to week 1, more New Zealanders are feeling less connected with the community and their neighbours.

Q: The city/region you live in is a place where neighbours help one another. 10=all the time, 0=seldom if ever  
Q: I feel connected to and involved in my community. 10=agree completely, 0=disagree completely

## The city/region you live in is a place where neighbours help one another

■ 0 to 6 ■ 7 to 8 ■ 9 to 10



## I feel connected to and involved in my community

■ 0 to 6 ■ 7 to 8 ■ 9 to 10



Blue values = significantly higher than average (95% degree of confidence)  
Red values = significantly lower than average (95% degree of confidence)

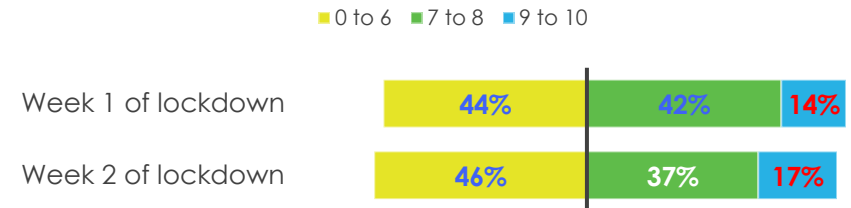
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Population representative weighting for each week



# The ability to control your own life.

In week 2 of lockdown, compared to week 1 we observe a minor decrease in the perception of being in control over how life turns out.

## How much control do you feel you have over the way your life turns out?



Q: How much control do you feel you have over the way your life turns out? 10=complete control, 0=no control at all

Blue values = significantly higher than average (95% degree of confidence)  
Red values = significantly lower than average (95% degree of confidence)

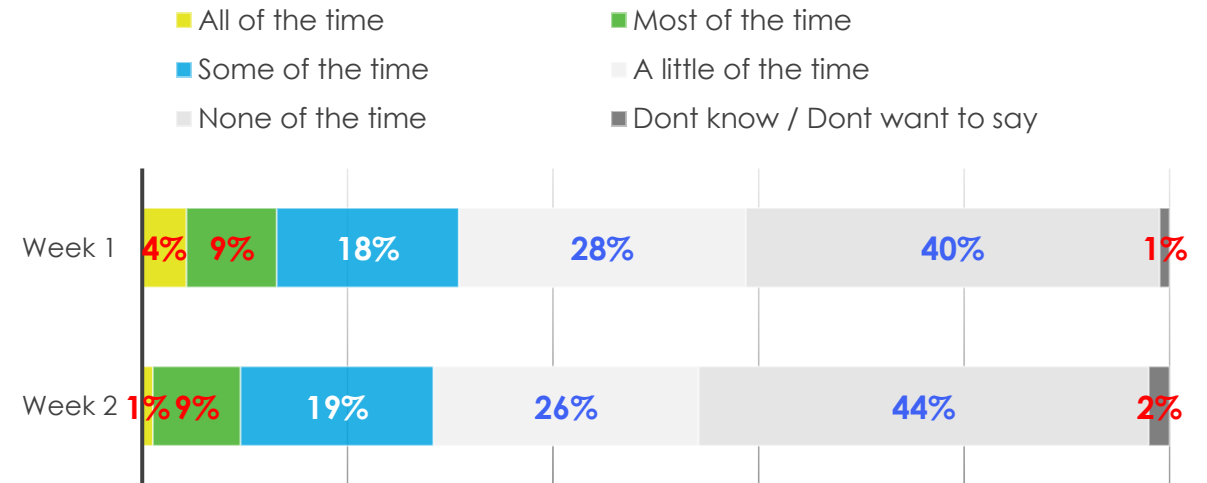
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Population representative weighting for each week



# How emotions are affecting life

Across both weeks, between 29% to 31% of all respondents claimed that emotional problems such as depression or anxiety interfere with their regular activities at least some of the times.

## Interference of emotional problems with your regular activities



Q: How much have any emotional problems such as depression or anxiety interfered with your regular activities?

Blue values = significantly higher than average (95% degree of confidence)  
Red values = significantly lower than average (95% degree of confidence)

Sample size: n=387 for week 1, n=328 for week 2  
Population representative weighting for each week



# what drives wellbeing

After 2 weeks of level-4 Covid19 lockdown

Week 1 - Lockdown (27/03/20 to 3/4/20)

Week 2 - Lockdown (4/4/20 to 10/4/20)



# How closely has Covid19 come to people?

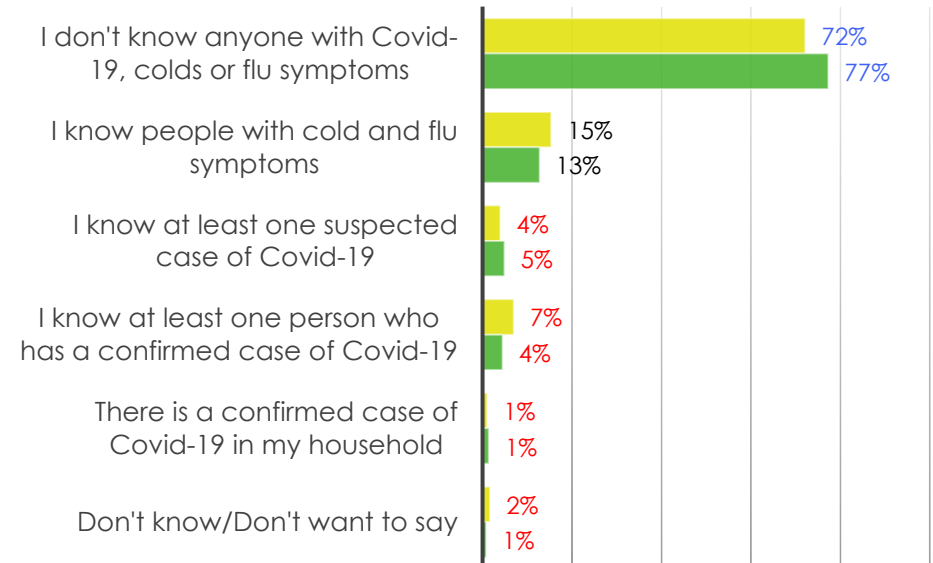
**Most people do not know anyone directly affected by Covid19.**

This strongly aligns with the overall feeling of being safe and healthy during lockdown.

Q: How closely has Covid19 come to you? Thinking about your social circle, friends and whanau.

**How closely has Covid19 come to you?  
Thinking about your social circle, friends  
and Whānau?**

■ Week 1 ■ Week 2



Blue values = significantly higher than average (95% degree of confidence)  
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Sample size: n=387 for week 1, n=328 for week 2  
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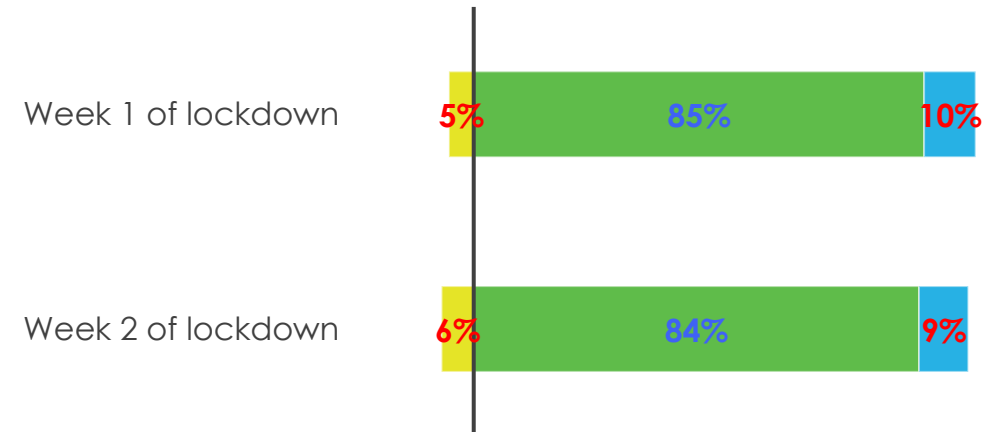


# Physical Health in check

Physical health perceptions have not changed – most New Zealanders feel as healthy as they were before lockdown, or even better than they were.

## Physical health perception

- Worse than last week
- The same as last week / no change
- Better than last week



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Q: How is your general health?

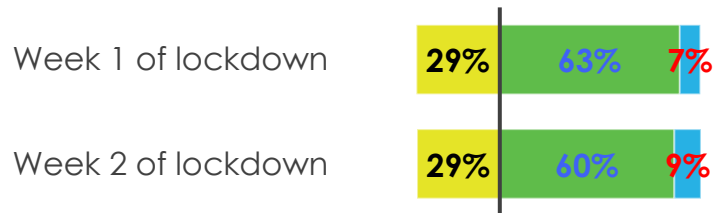


# Financial uncertainty is a major issue

**29% of all New Zealanders claim to be in a worse financial situation each week.**

## Money situation

- Worse than last week
- The same as last week / no change
- Better than last week



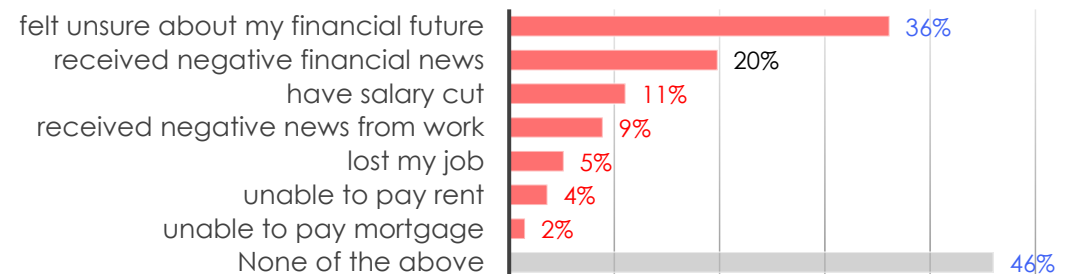
Q: What is your money situation like?

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Population representative weighting for each week

## Uncertainty is a major factor.

Few report to have lost jobs, or being unable to pay mortgage/rent, but uncertainty is very high with a large amount of respondents feeling unsure about the future or having received negative financial news.

## Has any of the following happened to you in the last few days?\*



**Blue** values = significantly higher than average (95% degree of confidence)  
**Red** values = significantly lower than average (95% degree of confidence)

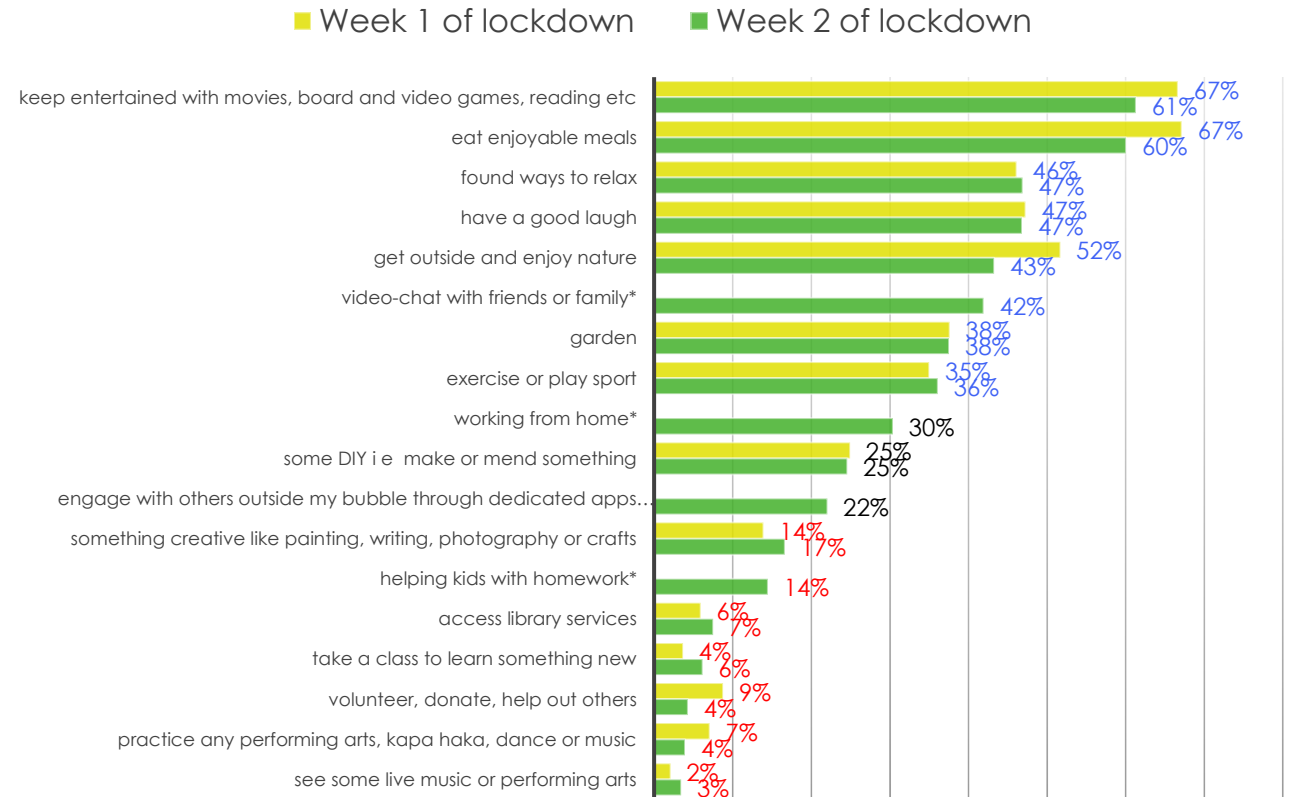


# Activities people have been able to perform

**In week 2, compared to week 1 the ranking of activities performed has not changed significantly,**

yet there is a significant difference in the proportion of people being able to enjoy some of the top activities, as shown in the next slide.

**Which of these have you been able to do in the last couple of days?**



Blue values = significantly higher than average (95% degree of confidence)  
Red values = significantly lower than average (95% degree of confidence)

\* Added in the survey from week 2

Q: Which of these have you been able to do in the last couple of days?

Sample size: n=387 for week 1, n=328 for week 2  
Population representative weighting for each week



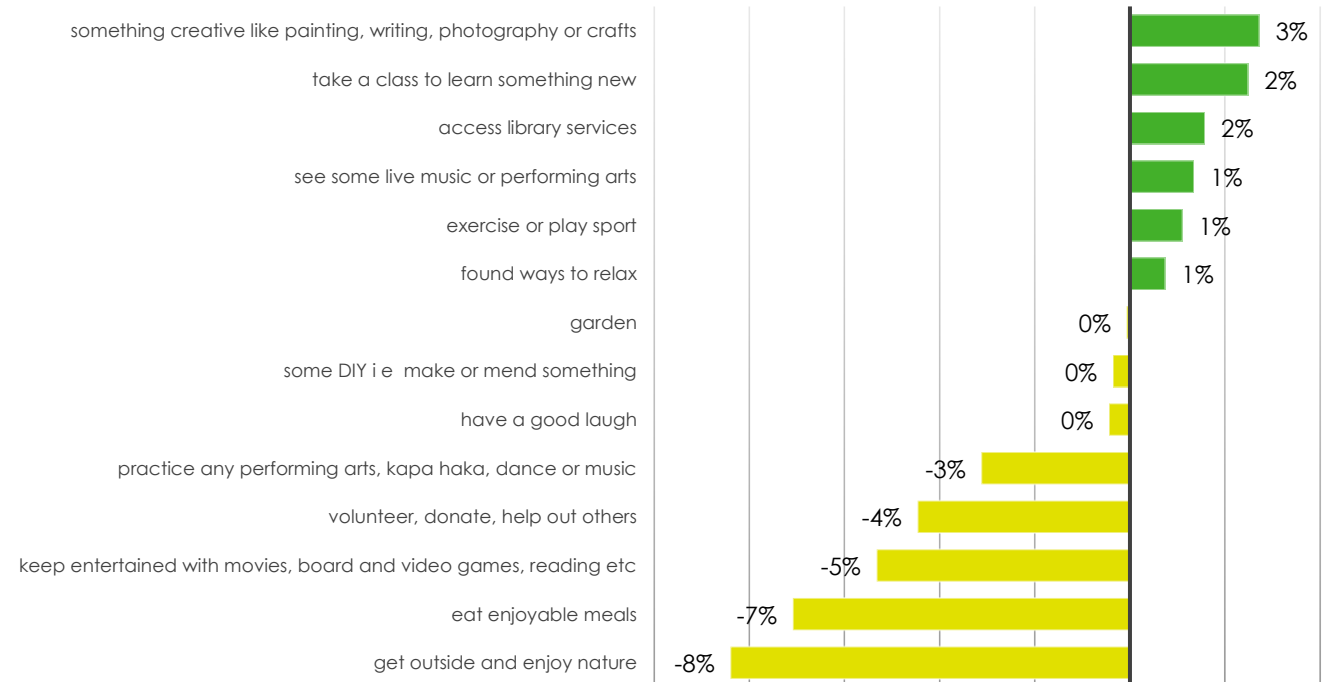


# Activities people have been able to perform

**Compared to week 1, in week 2 fewer New Zealanders are enjoying getting outside, nature, enjoyable meals, movies, reading and gaming.**

This aligns strongly with the recorded increase in boredom.

## Which of these have you been able to do in the last couple of days?\*



Sample size: n=387 for week 1, n=328 for week 2  
Population representative weighting for each week

\* Activities added in the survey from week 2 are not listed  
Q: Which of these have you been able to do in the last couple of days?



# Type of transport used

Compared to week 1, New Zealanders are starting to do less walking/cycling and more people are using cars, probably only going out when shopping for essentials like grocery shopping.

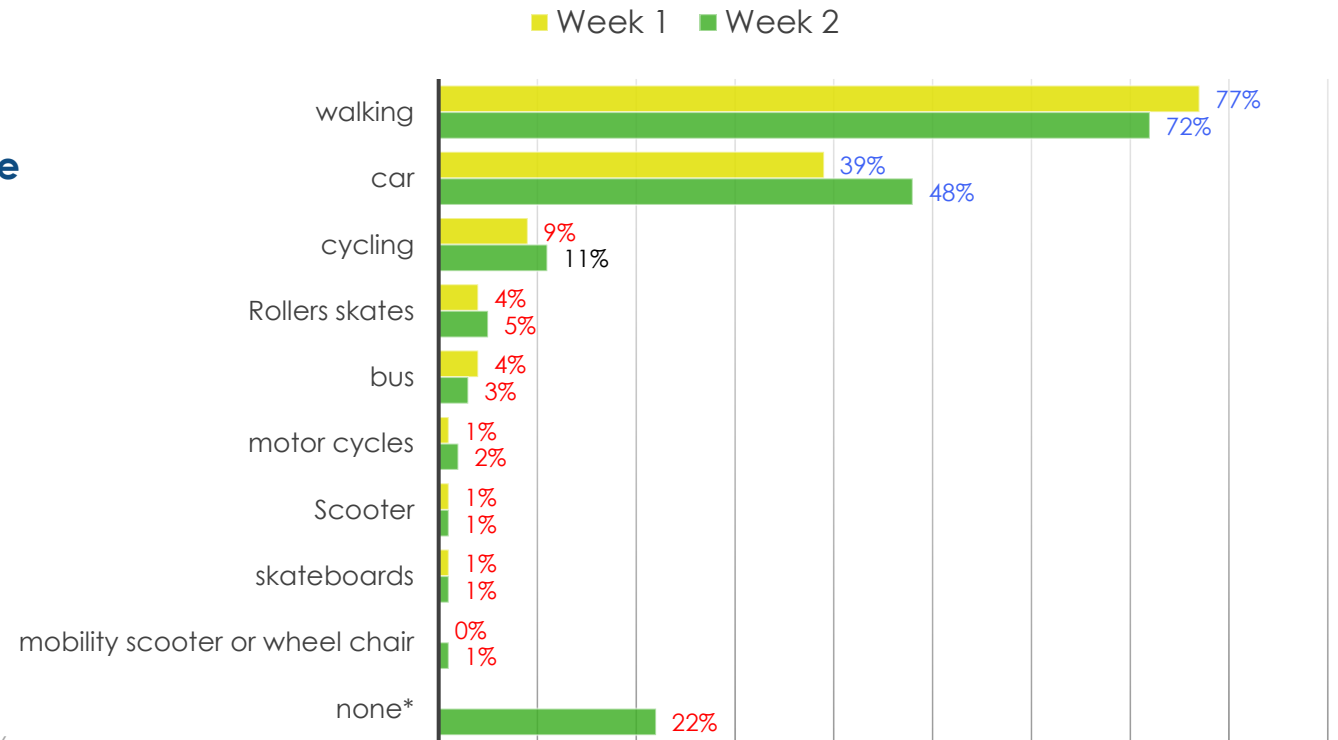
\* Added in the survey from week 2

Q: Select all the types of transport you have used today or yesterday.

Sample size: n=387 for week 1, n=328 for week 2

Population representative weighting for each week

## All the types of transport you have used today or yesterday



Blue values = significantly higher than average (95% degree of confidence)

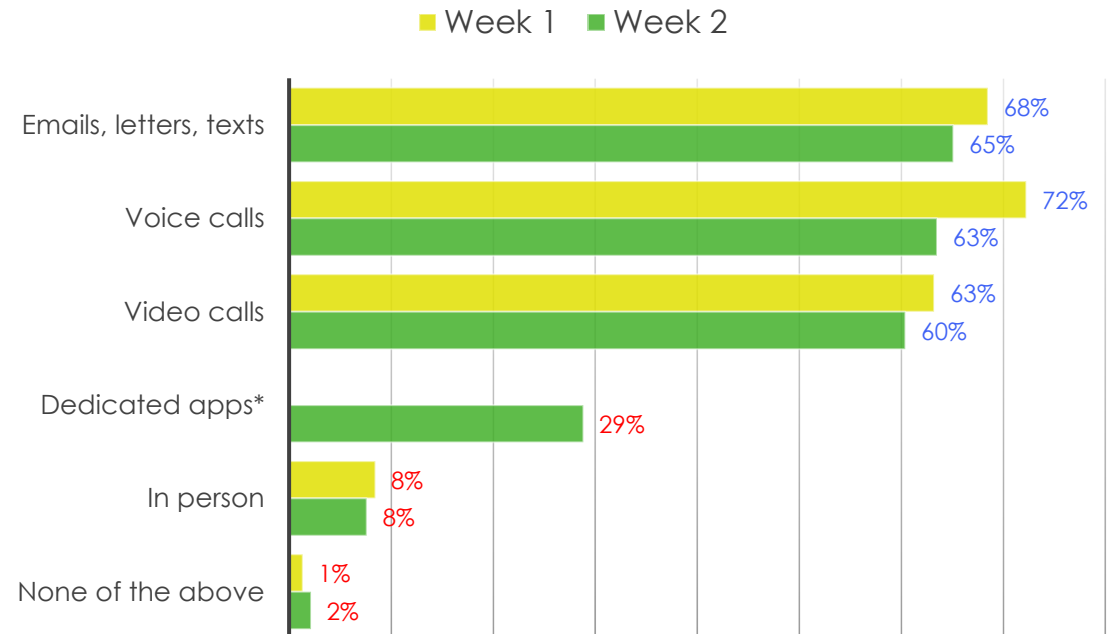
Red values = significantly lower than average (95% degree of confidence)



# In contact with friends and family

Compared to week 1, in week 2 people are starting to be less in contact with their friends and family who don't live with them.

In what ways have you been in contact with friends and family who don't live with you?



\* Added in the survey from week 2

Q: In what ways have you been in contact with friends and family who don't live with you?

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Sample size: n=387 for week 1, n=328 for week 2  
Population representative weighting for each week

# Get in touch.

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**FORWARD**

# About Forward.

**We are global experts** at putting consumers and customers at the heart of decision making to **build great brands on the basis of great products.**

**Forward is a strategic research, marketing and planning consultancy** based in Auckland, directed by two senior research and marketing professionals, with a total team of eight.

Forward successfully helps large NZ export businesses to reshape strategy, drive innovation and generate opportunities for growth in local and international markets.

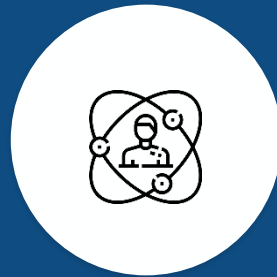


# What We Specialise in.



## Market Insights

Strategic research & insights with clarity and focus.



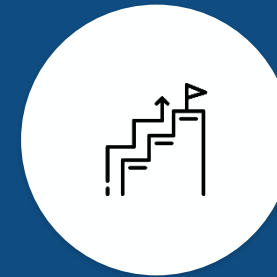
## Primary Sector

Focused primary sector and produce expertise. Working with leading global primary & produce sector partners.



## Worldwide

Global presence and capability.



## Winning Brands

We understand how to build differentiated brands with meaning and value to the market.



## Product & Cultivar Innovation & Optimisation

Experts in global sensory, product evaluation, related fruit management and measurement.

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