



**COLMAR
BRUNTON**

A Kantar Company

New Zealanders' attitudes towards contact tracing technologies

October 2020

CONTENTS

1

Executive summary

Pg. 4

2

Background and method

Pg. 8

3

General perceptions of
contact tracing

Pg. 12

4

Perceptions of technology

Pg. 26

5

Likelihood to use
technology

Pg. 34

6

Barriers and drivers to
using technology

Pg. 43

7

Measuring commitment to
bluetooth technologies

Pg. 48

8

Appendix

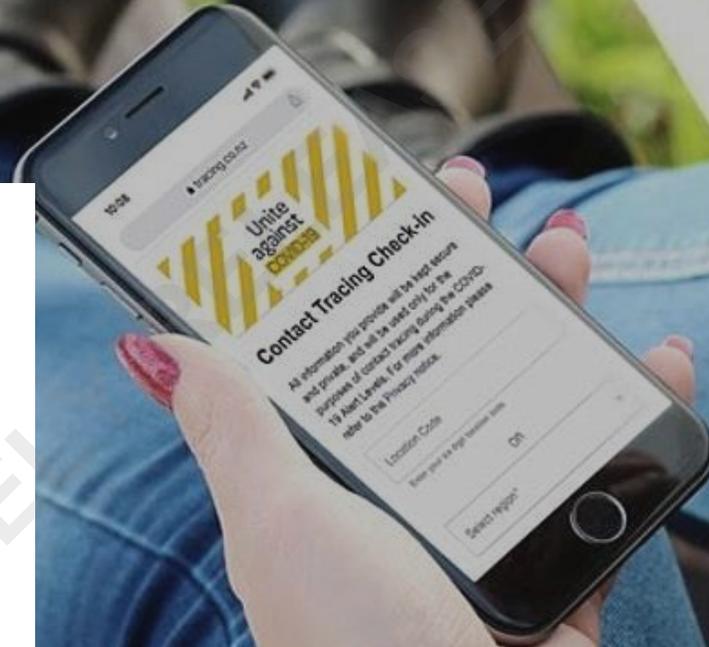
Pg. 57



**COLMAR
BRUNTON**

A Kantar Company

Executive summary



Executive summary: What have we learnt?

01

02

03

04

05

06

New Zealanders are willing to use technology for contact tracing

A majority of New Zealanders think contact tracing is important and are supportive of using technology to make this effective and efficient.

Seven in 10 support the Government providing the public with contact tracing technology.

Six in 10 are likely to use either the App or wearables (at present). Fourteen percent pretty much reject the use of technology for contact tracing, leaving a further 27% who may yet be convinced.

...but only when they feel there is a real risk

Willingness to use contact tracing technology depends on whether people feel at risk.

When there is active community transmission nearby, compliance is likely. The difficulty is when the proximity of risk seems further away, fewer people feel a need to do contact tracing behaviour.

Risk also relates to age, in that younger people are more resistant, and older people are more receptive.

People are more likely to use these technologies when around people they don't know, especially in confined areas (e.g. shopping or transport). They are less likely to use them around family and friends or in open spaces.

There is a key concern about data privacy

This is the main reason that people don't support contact tracing technology, and this concern is greater among Māori.

Barriers around the App also relate to data security, Bluetooth draining the phone battery, cost of data usage, and access for those with old phones.

Barriers around wearables include the visibility, look, size and method of wearing. It can be seen as 'another thing to carry' so people remembering to take it with them is a concern.

There is also a perception that wearables will cost more to the taxpayer than the App.

Apps and wearables appeal to different audiences

For smartphone users, the Bluetooth enabled App appeals as an easy 'set and forget' option, as they tend to have their phone with them when out of the home.

However, a key factor is having a 'new' enough smartphone to work well with the App. Some people mention issues with the current App not working well on older devices. This would be more of a concern for those with lower incomes.

The wearable appeals as an 'easy to use' option. You don't need any special knowledge or technology to do your part. Those over 70+ are particularly positive, although they may need assistance with getting set up. Overall New Zealanders are more likely to say they will use wearables (47%) than the App (36%). However, some of the support for a wearable could be based on the false premise that it can be popped into a wallet or pocket

There is a tension between what is easy and what is familiar

When it comes to the App, it may have shortfalls but people know what they are dealing with. It is comfortable because it's familiar. There is a greater sense of personal control, which is important when it comes to data privacy.

However, wearables are easier 'to use' and this is also important. If people are going to adopt a long term behaviour it needs to require minimal effort. People recognise this value in wearables.

New Zealanders need more encouragement to take up contact tracing

A third of Kiwis are highly committed to proactively use technology to support contact tracing. However, about 14% have resistant attitudes and see it as an invasion of privacy. They are unlikely to be convinced.

Over two in five New Zealanders have been identified as Fluctuators and so need more encouragement. They are receptive, but simply don't think that there is a current risk.

The key factors which will make a difference to getting them on board is a heightened sense of risk, as well as the prospect of avoiding lockdown and reassurances around data protection.

When it comes to wearables, the creation of social norms (seeing others wear one) can also provide a nudge.

Executive summary: So what does this mean?

01

02

03

04

People need convincing on why it's important to contact trace, even when the risk seems remote.

A wider education piece is needed to inform New Zealanders of the value of contact tracing when there is low or no community transmission.

People need to know that widespread use of these technologies before cases arise is key to avoiding future lockdowns.

Promoting a collective effort and creating a social norm around either technology is important.

Uptake will be better if people feel in control of their data and choices

With privacy and data concerns a key barrier to using the technologies, the message needs to cut through that the individual is in control.

It will be critical to highlight that data is stored on the device, they need to provide permission for officials to access it, and that data is deleted in a short timeframe.

Reassurances about data privacy will only go so far with Māori. There are wider issues relating to trust in government that communications cannot bridge. To appeal to Māori the focus should be on manaakitanga and caring for the vulnerable. It will take a collective effort to keep everyone safe.

The uptake of wearables will be better if people have choice around how to wear it, and are able to choose less visible ways of wearing.

Coverage can be maximised if both technologies are employed

Wearables and the Bluetooth enabled smartphone App appeal to different groups of people. While some would be able to adopt either technology, coverage will be maximized through employing both.

With New Zealanders more concerned about the cost of wearables, these could be targeted towards those who are less comfortable with technology, or those are unable to adequately use the App due to having an older smartphone or none at all.

Language is key. Minimise technical terms, and refer to tracing not tracking

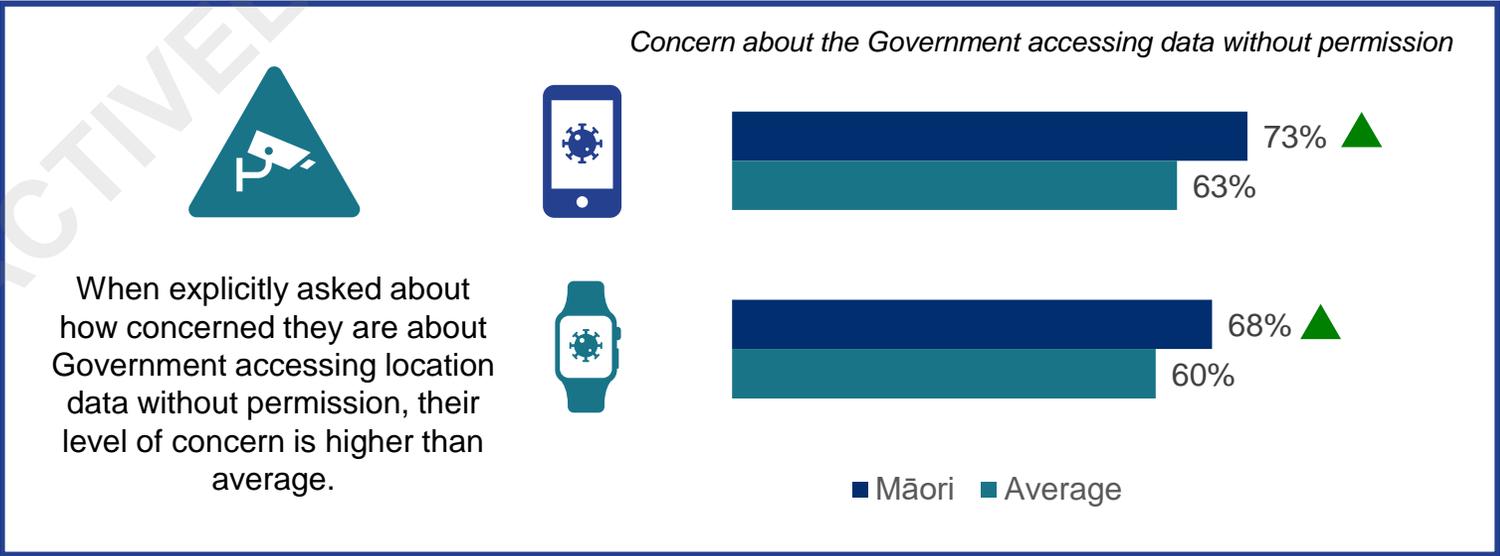
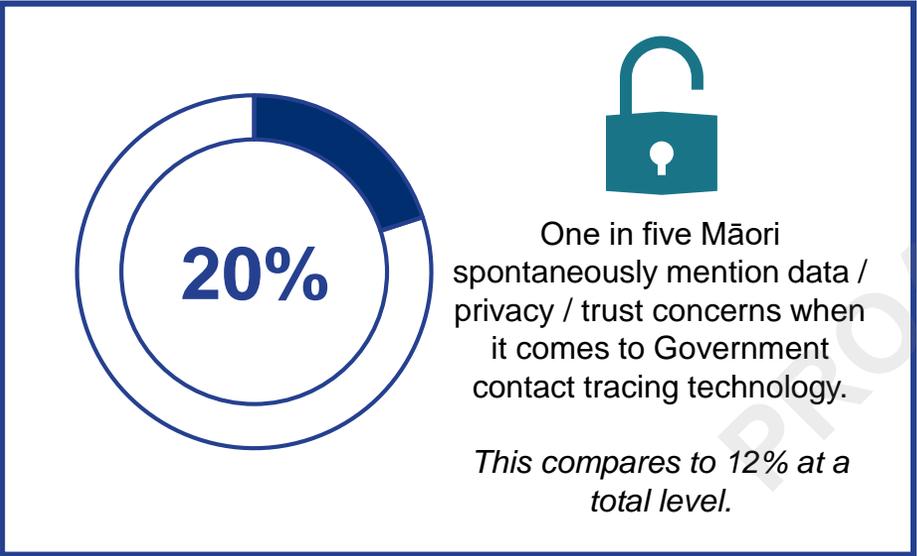
While some people will want to know that Bluetooth technology is used in the App and wearable, most do not need to know the detail.

The more technical descriptions are provided, the more likely it is that those who do not feel confident using technology will be put off by them (i.e. they think they need to learn or have specialist knowledge). Some people will want this detail so referring them to where they can find out more is better than trying to cover this in mainstream communications.

To ensure the message is heard that these Bluetooth technologies do not store location data, it's key to refer to tracing rather than tracking. People need to be clear that tracing is about their interactions with others, and not about the Government knowing where they have been.

Overview of Māori perceptions of Bluetooth technologies for contact tracing

Māori place similar importance on contact tracing as the average person, yet...



Overview of Māori perceptions of Bluetooth technologies for contact tracing

For Māori it is particularly important to reinforce the message of manaakitanga, caring for others – particularly kuia and kaumatua, mokopuna and the vulnerable. In addition, data security is a key concern and so an emphasis needs to be placed (as it does for others) that privacy is being maintained, procedures are being monitored and things are not being hidden.

In considering contact tracing Māori, place a strong emphasis on the collective effort and care for the vulnerable, the elderly particularly. They also speak of manaakitanga – caring for others – and an obligation to others (kuia and kaumatua) to use contact tracing to keep them and self safe.

However there is a tension between wanting to protect whanau and community, and a distrust in the Government's ability and intention around keeping data private

Despite concerns about data storage, privacy and use – it is that the greater good (contact tracing and protection of others) that outweighs individual privacy concerns and generally wins out

Current non users of the COVID tracing App prioritise individual control of their own information, data usage, security concerns; and currently the best way to maintain this control is not to use the App, and to complete the manual process. Some are not trusting of government per se; others have a wait and see attitude.

Non-use of the App does not mean they are not concerned about the health and welfare of others/community, they do their bit by completing the manual COVID registration process and some keeping a diary of their movements.

I want to make sure I'm doing my bit in terms of keeping whānau, vulnerable ones and the community safe... The COVID App helps with tracing people. A little concerned about data storage and usage – but in the end its about the greater good.

Interview participant, Māori, 76

And the worst case scenario for myself is being the one that passes it on to one of my kaumatua or a mokopuna. The worst thing ever is to feel you're the one at fault.

Interview participant, Māori, 37

No, I'm not trusting of government. I like my own privacy. Not sure where the information goes? So wait and see. I sign the sheet every time but I take my own pen – and then sanitise my hands. Not just government, but storage could be subcontracted out – and some clever dickie could work out how to access it and sell it. Personal information is valuable for many businesses.

Interview participant, Māori, 67

I'm not trusting of government and what they say they will do. Many laws are rushed through without us knowing what's happening – giving government agencies sweeping powers.

Interview participant, Māori, 68

Very much aware of potentiality of Bluetooth pros and cons. In the end it doesn't matter because manaakitanga responsibilities override concerns over Bluetooth.

Interview participant, Māori, 37



**COLMAR
BRUNTON**

A Kantar Company

Background and Method





The **Ministry of Health and Department of Internal Affairs** have commissioned Colmar Brunton to undertake research to understand New Zealanders' perceptions of contact tracing technologies.

Contact tracing is vitally important in the response to COVID-19. The use of technology to optimise the contact tracing process will play a critical role in New Zealanders' return to 'normal' and enable quick and effective action to be taken when positive cases arise.

This research explores New Zealanders' attitudes and expectations towards contact tracing technology, in particular the use of Bluetooth in smartphones and wearable technology (e.g. the COVID card).

Specific objectives of this research are to:

- Understand how likely New Zealanders are to use a smartphone App with Bluetooth enabled, or a wearable technology,
- Identify barriers to the adoption of these technologies,
- Explore contextual factors which may influence their use,
- Clarify who these technologies appeal to, and how they may reach different audiences.

Methodology

Quantitative methodology

- An online survey with n=1,002 New Zealanders (sourced from Colmar Brunton's online research panel). Quotas were set to ensure a representative spread in terms of age, gender, region, household income and household size.
- A phone survey with 300 respondents, skewed towards those who live in high deprivation areas*.
- Average interview length: 24 minutes by phone | 12 minutes online
- Maximum margin of error: $\pm 2.7\%$ (at the 95% confidence level and assuming a survey result of 50%).
- Data has been weighted by 2018 Census figures on the same criteria used for quota and sampling. Additional weights were applied to correct for an overly compliant sample whereby 78% of our survey participants had downloaded the COVID Tracer App. These respondents were down-weighted to reflect the true incidence in the population (50%).

Qualitative methodology

- A two day online qualitative forum called 'Qualboard' was conducted with 32 participants aged 18 years and over from a wide range of demographic groups and a mix of attitudes and when it comes to technology
- 14 individual qualitative interviews primarily conducted by phone with those who are more vulnerable and harder to reach through digital means
- One community group with vulnerable and/or digitally disadvantaged older Māori.

Notes to the reader:

- Any sub-group differences reported in this research are statistically significant at the 95% confidence level.
- Individual percentages do not always sum to the 'nett percentages'. This is due to rounding.

*The phone survey participants were identified through generation of random landline numbers (RDD sample) for which the area code is known to correspond with high-deprivation areas in New Zealand. This approach enables further reach than the online survey to gather views of those who are digitally disadvantaged and may not have access to, or use, the internet or smartphones.

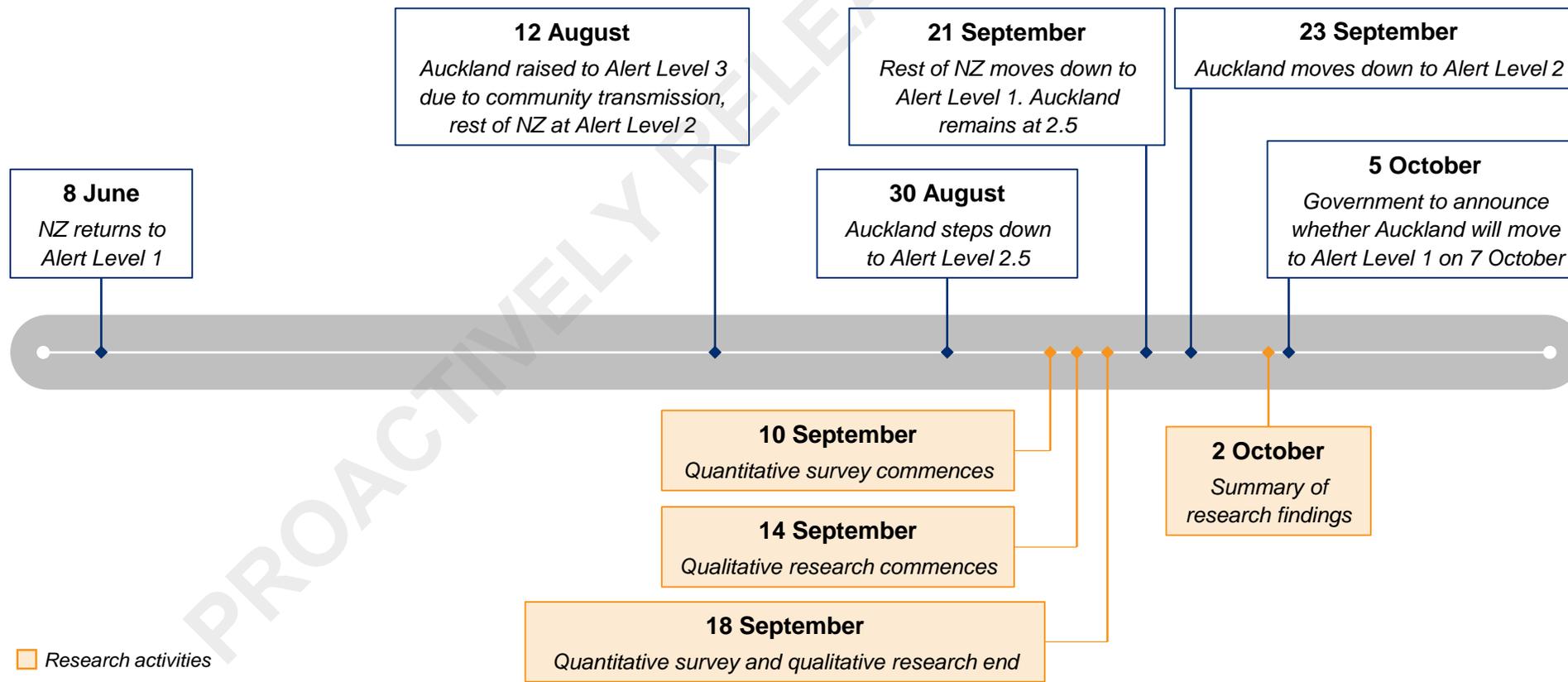
Timeline for research

The research consisted of two concurrent phases – **quantitative** and **qualitative** research.

This report pulls together the findings from both phases.

Contextual timeline:

It is important to note that this research reflects New Zealanders' views at a particular point in time and that these views may change as the COVID-19 environment changes. The timeline shows some contextual factors that are worth noting when interpreting results.





**COLMAR
BRUNTON**

A Kantar Company

General perceptions of contact tracing



Attitudes toward COVID-19 in New Zealand

There is a sense that the situation in New Zealand is “not that bad” and that ‘COVID fatigue’ is creating some complacency. At the same time the ‘team of five million’ accept they have a role to play.

New Zealanders broadly believe that extreme situations require extreme measures... but the situation in New Zealand is not extreme, especially when compared to many overseas countries.

- There is no clear sense of urgency in terms of a COVID response, even among those who are compliant.
- Overall, the qualitative research findings suggest there’s a big education piece missing around (a) the longevity of the situation we’re in and (b) that viruses will come back again and we need to be ready ... without scare mongering.
- At the same time most people report that they are doing something and using the App (in its current form) is a key part of this.
- For the majority of people, the giving up of small freedoms is the price they are willing to pay for the benefit of protecting the health of people in their communities and to protect the economy.
- But there are some who are either jaded or non-believers and this is driving non-compliance.

Visibility of COVID prevention behaviours serves as an important reminder and reinforcer of social norms. For the Difficult and Deniers (see Slide 51) in particular who are less motivated by health and economic outcomes, this exerts a social pressure to comply.

I think when the risk is very low and Covid 19 is constantly in the news/media people start to lose interest and start being complacent. That is probably why the initial uptake of the App was very low initially until the 2nd lockdown.

Qualboard participant, Follower

Some people may find it too difficult or overwhelming, privacy and being tracked of where you have been, too much effort to use, COVID fatigue.

Qualboard participant, Attainer

I think NZ's laid back attitude and "she'll be right' mentality gets in the way for some people who don't perceive the danger.

Qualboard participant, Fluctuator

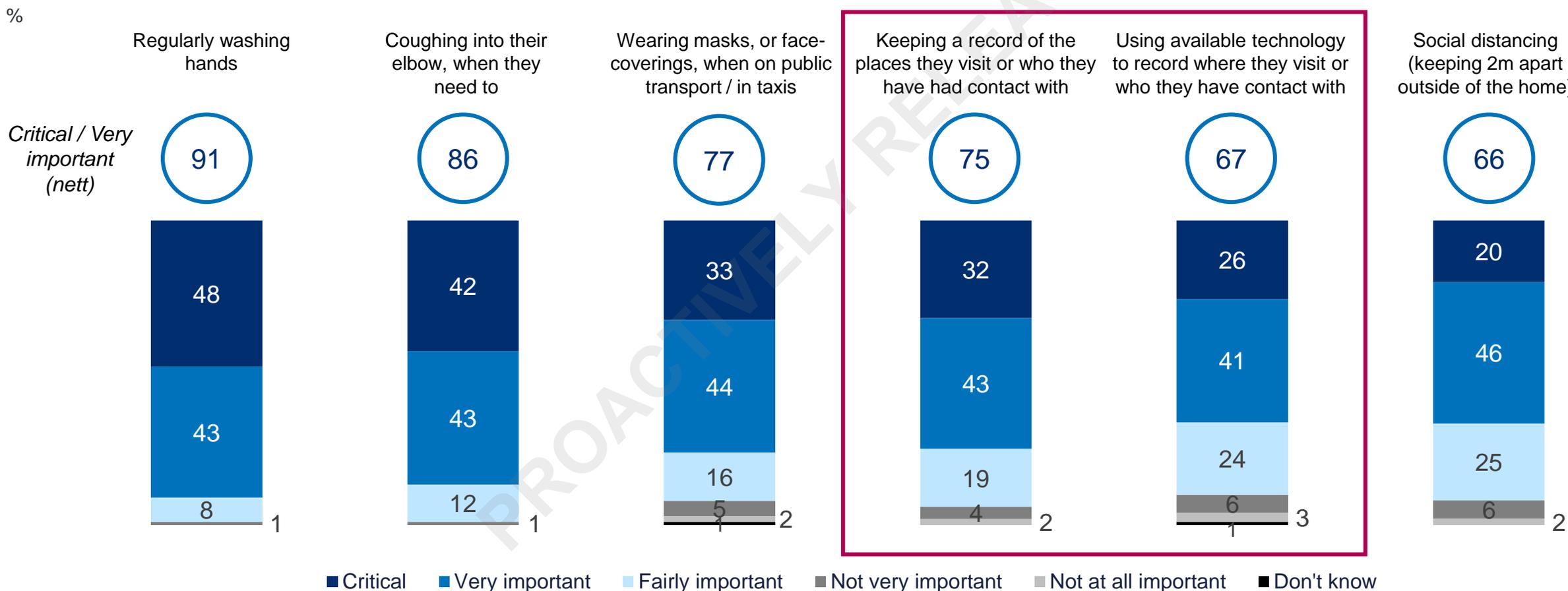
Even myself, at the shopping centre the other day, I saw a small line of people waiting to sign in the QR code at the place - if I see people do that, I myself will be more inclined to do it. Also, some shops and restaurants have staff by the door checking if customers have signed in – which I think is very effective in creating habits for customers.

Qualboard participant, Follower

Perceived importance of contact tracing in managing COVID-19

Over two thirds of New Zealanders believe contact tracing activities are important in managing the spread of COVID-19. While three quarters (75%) consider it important to keep a record of contacts, fewer (67%) place importance on the use of *technology* to record these contacts. Contact tracing is perceived as less important than washing hands and coughing into one's elbow, yet more important than social distancing.

Perceived importance of everyone doing these activities to help manage COVID-19



Base: All respondents (n=1,302)

Source: Q1. How important or not do you think each of the following are in helping New Zealand to manage COVID-19?

How much does contact tracing matter to us?

Seven in ten (70%) New Zealanders consider contact tracing important. The perceived importance of contact tracing is particularly low among men under 50.

Importance of contact tracing

Not important
4%

Important
70%



Perceived importance of contact tracing is **lower** among:

- Men (64%, compared to 74% of women)
- Those under 50 (62%)
- Men under 50 (58%)

Our views on contact ‘tracking and tracing’ explored

‘Tracking’ carries strong negative associations and implies constant location based monitoring, while ‘tracing’ feels less intrusive

Tracking for most people implies monitoring a person to their **location** – and this raises concerns about impinging on people’s privacy. The word ‘tracking’ implies the ability to monitor in people in real-time and the possible creation of **detailed movement profiles**, which again causes concern.

Most people describe tracing as a process of working backwards and following the path a person took – it is retrospective and feels much less sinister when compared to their understanding of tracking. It does not carry the same implications of monitoring people in real time – the assumption is that tracing process only begins in the event an individual is diagnosed with COVID (where as ‘tracking’ is constant and ongoing’).

The use of the word ‘tracing’ for the existing COVID App which many people see as a ‘tracking’ device has somewhat muddied the waters between tracking and tracing. The qualitative research findings indicate it will be important to create clarity in the communications on how ‘tracing’ is different to ‘tracking.’

Tracing in my mind, it's like tracing footsteps. Where did you go, all the places you went to and the people you interacted with and all the people you came into close contact with. Track to me, it's like hunting someone down. For some reason sounds it more aggressive to me. It's like you're trying to find the culprit or your trying to hunt someone down for having COVID-19 only to ship them off to a hotel or the hospital.

Qualboard participant, Denial

Tracing to me is about holding info and using it if needed to find out where I have been in the case of a COVID overlap. Tracking is following my each and every movement. It implies following my movement - and a breach of my personal privacy.

Qualboard participant, Fluctuator

I think there is a fine line between contact tracing and tracking. I believe it becomes tracking when the location and whereabouts of an individual are known at all times, as to exactly where they are. But I believe if you are simply checking what locations they have been to, without being able to track them live, it is only classified as tracing. I think for most it becomes tracking when they feel they lose their sense of privacy. Tracing locations they have been to is not so much like tracking.

Qualboard participant, Follower

Attitudes toward the current tracer App

Overall the current COVID-19 tracing App is working well, but there's room for improvement

Most people we talked to are using the App and there's a sense of being in this together and working towards a common goal. This is reinforced when people see others using the App out in public.

But for some, the biggest drawback is that the current App is reliant on the effort and compliance of New Zealanders to be effective, and people would benefit from seeing the direct link between people using the App and the ability to identify close contacts quickly and efficiently – for example the recent contact tracing of 85 contacts of the person diagnosed with COVID who attended the Les Mills gym. People need reassurance that the tracing App is effective when it is needed.

For most people who are using the App, it's easy to operate and navigate

However, glitches have been experienced and these can cause frustrations – for example, the verification code not working, the App logging itself out and having to password reset. Indeed the quantitative research found 10% of smartphone users say they have tried to download the App but couldn't.

Reluctance to download the App is primarily driven by concerns about the Government wanting to track our whereabouts – the idea of 'Big Brother' watching. People are also concerned about how our personal details might be used.

We recently became regular users, it's straightforward but it's a nuisance... the end goal is what keeps us using it.

Interview participant, 73

I'm not sure if they're really doing it for COVID-19 or another reason, something else the Government wants our information for.

Interview participant, 39

Perceptions of what is working well and less well with the current App

The broad appeal of the current App is its convenience – however usability and technical issues are causing frustrations that provide an easy ‘opt-out’ for those less motivated to use it

Working well

- Faster than signing in manually
- More confidential than paper and pen
- QR codes as a reminder to scan in (would otherwise forget)

The App is much easier than using pen and paper, and it is more convenient given that most people will also have their phones with them, than having to dig around for a pen.

Qualboard participant, Fluctuator

What holds me back from using the App, is that I do not like App, and also you will have all my information, where I go and for how long ...etc. I prefer to sign the paper every time.

Qualboard participant, Denial

Less well

- People have not downloaded it / refuse to use it
- Relies on people to put in the effort and comply
- Not everyone uses it
- Have to remember to scan in and out
- Not using it when in a hurry
- Slow – have to stop and wait to sign in
- QR codes being incorrect (wrong location)
- QR codes not reading – won't focus / sunlight
- Have to open / close the App every time
- Sign in issues – reset password / auto log out
- Install issues – verification codes not working
- Updates required
- Not compatible with older smartphones
- Inconvenient – have to always carry phone (some elderly people particularly)

Most times, you try to locate it in the square. Sometimes it tells you to do a manual entry. It's annoying.

Interview participant, 64

I have downloaded the COVID tracer App but not used it frequently as my phone had some issues while scanning the QR code, so I always ended up signing the register manually at the places where I visited.

Qualboard participant, Fluctuator

Motivations and reservations for usage current COVID App

Key motivations which come through for using the Tracer App including doing the right thing, social pressures and wanting to stay open for business. A lack of familiarity with technology is the main barrier, as well as COVID fatigue, and resistance to 'top-down' initiatives which are imposed on the population.

Motivates....

- **Morality** – it's the right thing to do - Stop the virus and save lives
- **Social Norms / pressure** - Other people in my social circle using it, feels good, collective effort
- Wanting to “**stay open**” – avoid lockdown / keep businesses open
- **Civic responsibility** – doing my bit
- **Legislation** – businesses requiring sign in upon entry
- **Context / design** - Seeing signage reminding to use (but can also trigger frustration/ anger)

I also wish to see New Zealand go into level 1 as soon as possible which is another large reason for using the App, alongside ensuring that I'm not passing on the virus if I happen to go to a place that is found to be contaminated.

Qualboard participant, Follower

What motivates me is that I hope I am doing my bit to help eliminate COVID 19. I want to know if I have been in contact with a positive case, so I can go get tested, even if it's for peace of mind, and I hope others think the same way.

Qualboard participant, Fluctuator

For me its a no brainer. The App is quick and easy and avoids touching pens and paper numerous others have. Everyone except one friend have the App.

Qualboard participant, Advocate

Holds back....

- Not tech savvy – don't know how to download/use
- Technical issues with the App
- Scared to have on phone (privacy / data hacks)
- Laziness / too much effort to use
- Not necessary / don't believe there's an issue / over hyped flu
- Quick trips – unlikely to need it
- Don't have time to stop and scan
- App is a constant reminder of COVID-19
- No COVID cases in my area – not necessary
- Don't want to give in to government control
- Feeling forced to comply
- Scepticism around contact tracing actually being conducted

I understand the sentiment of the App and the importance of using it. I use the App MOST of the time when out and about but do find it time consuming to remember to pull out my phone, find the App then scan in. And often as there is a line to get into a shop, I sometimes hold people up behind me - some of which don't even attempt to sign in in anyway.

Qualboard participant, Fluctuator

Some people are not comfortable using tech as much as others are and therefore will avoid the App. I have also had conversations with people who don't use it simply because they just do not care, they have no reason as to why they do not use it.

Qualboard participant, Follower

Support for Government providing the public with technology to support contact tracing

Seven in ten (70%) New Zealanders support the Government providing the public with technology to support contact tracing. Support is weaker among Māori and those with lower household incomes.

The Government is looking at different ways it can support the public to keep a record of where they visit and who they come in to contact with. This includes the use of different types of technologies. Examples of this could include an App on a mobile phone, or a device that you wear. How do you feel about the Government / Ministry of Health providing technologies to the public to record where they have been or who they have been in contact with?

The following groups are more likely than average to think this is a bad idea:

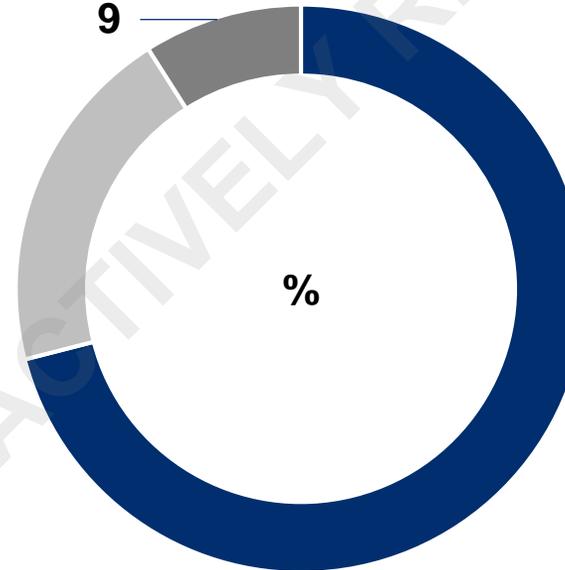
- Māori (15%)
- Household income under \$70K (14%)

A bad idea
9

Not sure
20

The following groups are more likely than average to be unsure:

- Women under 30 (31%)
- NZ Europeans (23%)



A good idea
71

The following groups are more likely than average to think this is a good idea:

- Those aged 70+ (81%, particularly men aged 70+ 88%)
- Asian New Zealanders (88%)
- Household income over \$100K (79%)
- Aucklanders (77%)

Support for technology provided to the public does not change based on whether it comes from Government or Ministry of Health.

Reasons for supporting, or not, the Government providing the public with contact tracing technology

Those who support this idea tend to support the use of technology to facilitate more effective and efficient contact tracing. Those who do not support it, or are unsure, are typically concerned about privacy or tracking.

Reasons for thinking it's a good idea...

General support for technology that improves contact tracing / COVID response (nett)	62%
<i>Better, faster, easier contact tracing</i>	37%
<i>To prevent the spread, contain the virus</i>	15%
<i>Effective way to keep track of people's movements</i>	14%
<i>To keep everyone safe</i>	5%
Easy, efficient, and accurate (nett)	17%
<i>Easy to use</i>	5%
General positive comments (nett)	11%
<i>It's important, essential, we need it</i>	5%

Reasons for being unsure...

Concerns about being tracked by Government/privacy issues	32%
Want more information about it in general	10%
Want more information about data security/privacy	9%
Current App is sufficient or prefer manual recording	7%
Accessibility concerns, not everyone has a smartphone	6%
Would only support voluntary initiatives (not compulsory)	5%

Reasons for thinking it's a bad idea...

Concerns about being tracked by Government/privacy issues	51%
Current App is sufficient or prefer manual recording	8%
Cost concerns	6%

Those who say it's a **bad idea** have a wide range of other reasons, other comments include:

"Too many conspiracy theories around"

"Can be abused by other government departments, no matter what safe guards."

Note, nett categories shown in bold represent wider themes and more detailed responses within those themes are shown below in italics.

Responses shown by 4% or fewer respondents not shown

Base: All respondents (n=1,302)

Source: Q4. For what reasons do you think this is a (good idea/bad idea/are you not sure)?

The addition of new technology can feel like more effort – until explained

A new or additional initiative to manage COVID-19 on first impression can feel like added complexity

For most its ANOTHER
SAFETY NET /
IMPROVEMENT

- More initiatives = more safety
- Constantly improving systems shows progression and staying ahead of the challenge
- Being the first to nail an effective App = Kiwi innovation is a source of pride
- It's an investment in our safety / health

For a few its OVERKILL

- More initiatives = more reminders of COVID and more inconveniences
- The perception that it's a waste of money
- So few cases... do we need it?

A key hook is that the application of the technology is about **SIMPLIFICATION** – both for the user and in terms of tracing

It's not more complication and effort – it's less.

Most people understand the basics of Bluetooth...

It has *mostly* positive associations and as a technology doesn't raise a lot of concerns

Most people, including the less tech savvy and the older participants we talked to, had some experience or awareness of what Bluetooth is. In its simplest form, people describe it as a technology that connects devices together. Even the less tech either already understand its function, or understand it once it is explained to them.

Bluetooth can carry positive connotations e.g. safety associations with handsfree / listening to music

For those who are less comfortable with technology however there is some confusion around where Bluetooth ends and GPS tracking begins. There's an assumption that if it's on your phone it has the ability to access anything, and this will need to be explained to people

And for a small few, there are some concern about the radio frequency associated with Bluetooth for the technology avoiders or interference with existing devices e.g. hearing aides

It's an internal short range electronic signal for interconnective software, for usage in connecting devices such as a doorbell or speaker. Essentially it's for connecting technology.

Interview participant, 73

I am very sure everyone knows what Bluetooth is and what does it do I use it everyday for my work and driving plus makes it easy for me.

Qualboard participant, Advocate

Bluetooth allows tech devices to link. Like hearing aids to TV, speakers etc. Tablet to speaker. Yes I'd be all for it if it helps with tracking and tracing. I don't have any concerns.

Qualboard participant, Fluctuator

Bluetooth is a wireless technology that allows the exchange of data between different devices within your range, and generally it only works within short distance for the devices to stay connected. I have no concern at all.

Qualboard participant, Attainer

I don't know a lot about it but I use it in my care for hands free.

Interview participant, 72

The key benefit of technical solutions

'Bluetooth' as a technology doesn't sway people one way or they other – it's more about the benefits of the technology than the technology itself. It's important to remember for communications that the real hook is the benefits of ease and convenience.

One of the key benefits of the technology is that it does not require technical competency. People generally appreciate that it's not another piece of technology that they have to get their heads round. The fact that it's automated and people don't have to spend time learning a new technology overcomes initial reluctance to compliance.

Most see the automation and not having to change behaviour by pulling out your phone or swiping a card as a key benefit – Bluetooth can work in the background without you having to 'do' anything.

Another key benefit that people assume is that they don't have to remember to sign in using QR codes.

They are also mention faster and / more efficient contact tracing enabling New Zealand to stay open – a way of avoiding lockdown again

Overall it's seen as a step towards a more innovative / streamline tracing process for now and future use – some note that viruses are not going away!

INFORMATION PROVIDED TO RESPONDENTS

Bluetooth is a system that allows a signal from one device to connect to another device when it is close by. Bluetooth technology could be used to detect other devices that are reasonably close to you, and store other devices ID numbers for a period of time. If you or the person you came into contact with tests positive for COVID-19 then this the ID contacts recorded by the Bluetooth technology could be used to help find those other people as a part of the contact tracing process. The device would not include GPS tracking, and no personal information would be stored on the device.

It's more reliable than people. It does not rely on peoples' memory, compliance, co-operation or competency

Interview participant, 77

To me, idea sounds easy, great and accurate for contact tracing. The fact that device wouldn't include GPS tracking and no personal information would alleviate some people's concerns of privacy issues. Benefits of doing contact tracing this way would be the ease of use - technically, people won't need to do anything like sign in or scan something - they would just need to bring along this device in their pocket, wallet, handbag wherever they go. Ho,

Qualboard participant, Follower

Trust for Government to manage data and attitudes toward data security

Data and tracking are bigger concerns than ever

A level of mistrust has already been formed in the Government's ability to manage data securely, through various media stories including New Zealand hospital data hacks, a leak of the firearm register, NZ police contacts data, and Chinese hacking scandals.

The qualitative research suggests some New Zealanders will always have a certain level of scepticism around what is 'really' being done with their data.

This is driven by a fear of the unknown – who has my data, where is it kept, who is responsible for ensuring it stays safe?

For the COVID technologies some of these concerns can be eased by communicating users have personal control over their data.

As already there have been public leaks of COVID-19 patients information I see this as being extremely problematic considering the stigma of COVID-19. The security of these apps and how the information is used is crucial.

Qualboard participant, Denial

Questions about how data is stored, who actually has access to it and how they specifically use it would be helpful. But again, I think they would need to be answered in a more relatable format than the typical terms and conditions.

Qualboard participant, Fluctuator

There is an expectation that 'technology' carries security risks - people are resigned to at least some level of risk

Qualboard participant, Follower

Most people would want some sort of protection, possibly passwords or something that means they are in control of the situation.

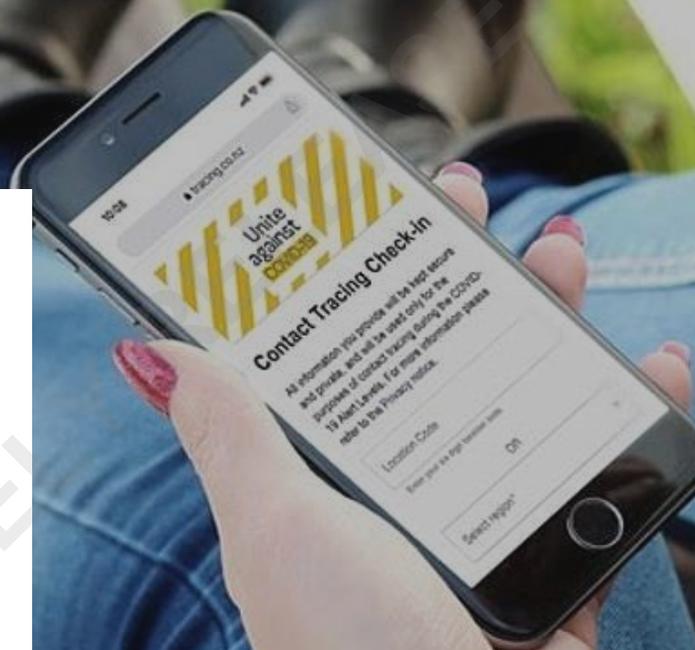
Qualboard participant, Fluctuator



**COLMAR
BRUNTON**

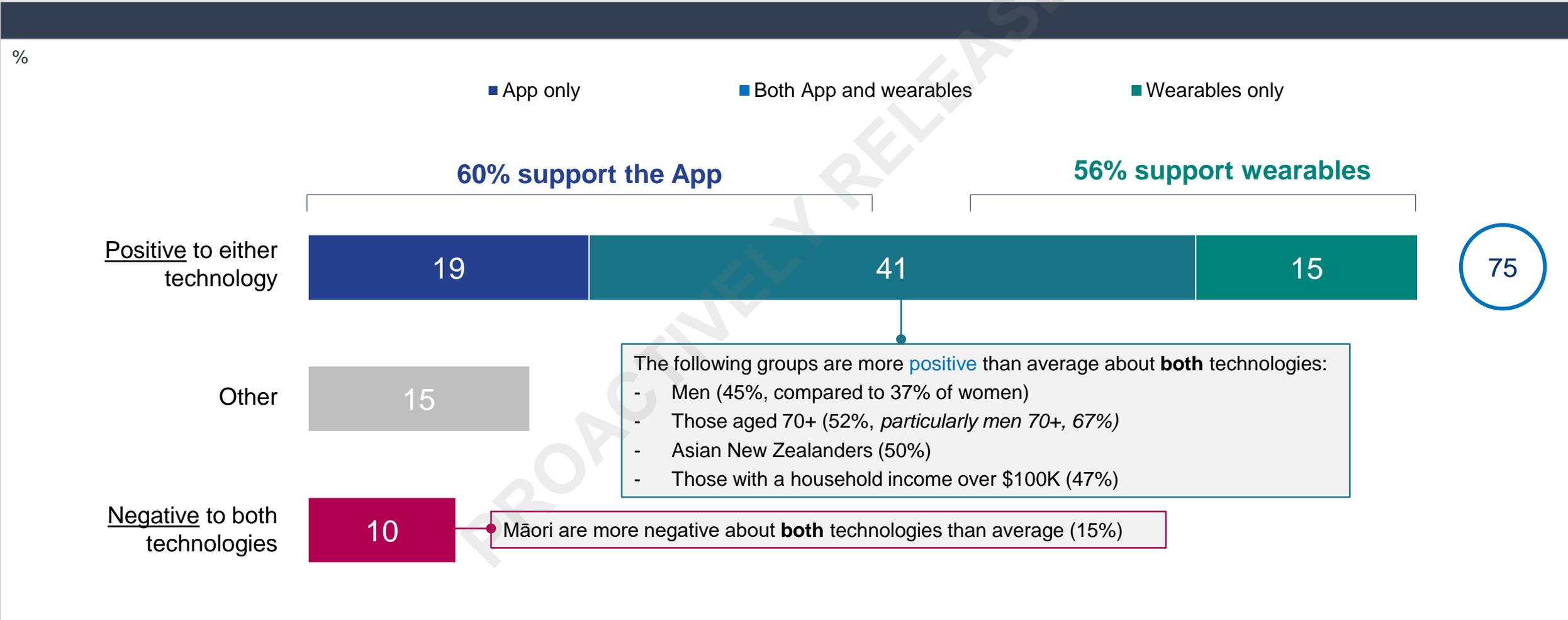
A Kantar Company

Perceptions of technology



Overall sentiment towards contact tracing technology

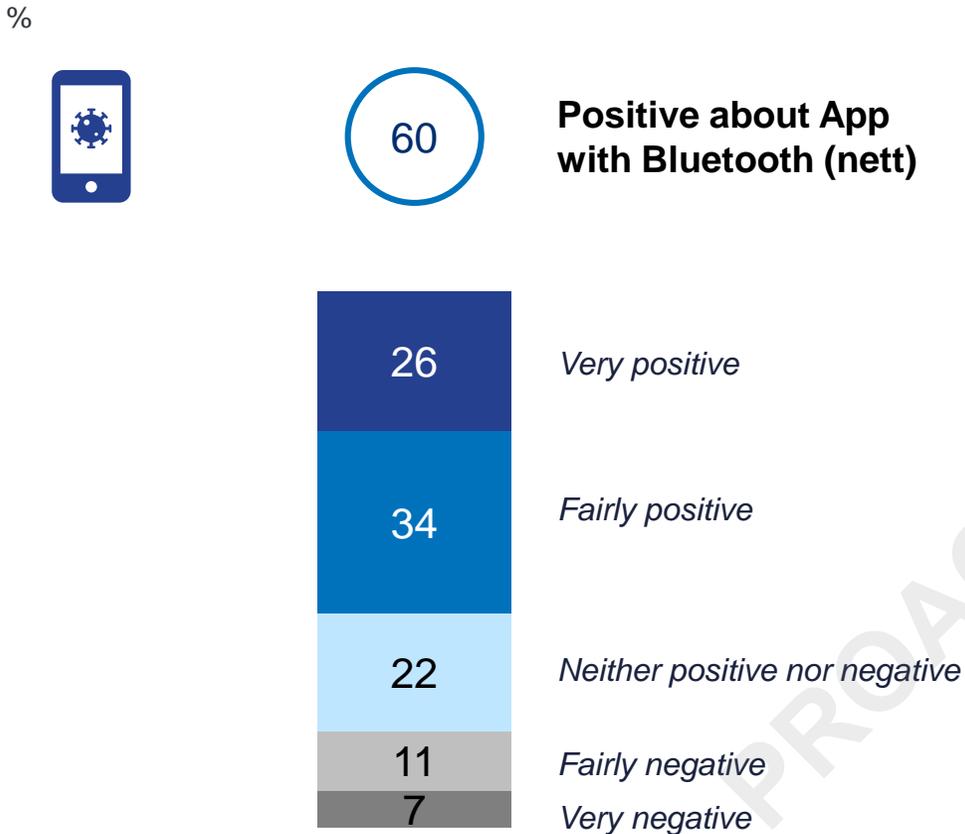
Three quarters (75%) of New Zealanders are positive about either the App or wearables. Four in ten (41%) New Zealanders support both options, while one in ten (10%) are negative about both. Negative perceptions are more common among Māori (15%).



Perceptions of the App with Bluetooth

Six in ten (60%) New Zealanders are positive about using Bluetooth functionality within the App to help with contact tracing. Positivity is highest among Asian New Zealanders, higher income households (\$100K+), men aged over 70, and those confident using technology. Māori are least positive about this option.

Perceptions of the App with Bluetooth for contact tracing



Support for the App with Bluetooth among key demographic groups

The following groups are **more** likely than average to be **positive** about the App:

- Asian New Zealanders (71% positive)
- Those with a household income over \$100K (70%)
- Men aged 70+ (78%)
- Those who believe contact tracing is important (70%)
- Those who are confident using technology (62%)

Māori are **less** likely than average to be **positive** about the App (47%)



Reasons behind perceptions of the App with Bluetooth

Support for using the App with Bluetooth is mainly driven by perceptions of improved contact tracing efficiency. Ease of use is also a key factor. Those who do not support the App with Bluetooth tend to be concerned about data privacy and tracking, while those who are unsure want more information about how it works.

Reasons for being positive about App (n=361)

General support for technology that improves contact tracing / COVID response (nett)	28%
<i>Good if it helps contact tracing or speeds it up</i>	21%
Easy to use (nett)	25%
<i>Easy to use or set up</i>	12%
<i>Minimal effort, it's automatic, I don't have to do anything</i>	10%
<i>Some people forget to track their movements or forget</i>	5%
General positive comments (nett)	25%
<i>Good idea, makes sense</i>	8%
<i>Our privacy, data, information is safe</i>	5%

Reasons for being neutral about App (n=102)

Don't know enough about how it works	16%
Data, information could be hacked	8%
Good idea, makes sense	6%

Reasons for being negative about App (n=64)

Concerns about privacy, tracking, 'big brother'	19%
Data, information could be hacked	16%
Lack of trust in Government, people responsible for it	10%
Drains battery too fast	8%
Don't like having Bluetooth on all of the time	8%

Note, nett categories shown in bold represent wider themes and more detailed responses within those themes are shown below in italics.

Responses shown by fewer than 5% of respondents not shown.

Base: Refer to each table | Source: Q12. For what reasons do you feel (positive/negative/neither positive nor negative) about using Bluetooth technology in smartphones to help contact tracing?

Perceptions of using bluetooth technology through the App

The qualitative feedback on the App backs up much of what the survey respondents said.

What they liked

- More user friendly than current system (automatic not manual)
- No need to change behaviour, most people always have their phone with them
- Sounds effective – fast automatic tracing
- Straight to the source of issue – traces people not places
- Good for people who move around a lot – can't remember every location
- Captures contact outside of venues e.g. on the street / in a park
- No more manual / QR sign-ins (assuming this is no longer required)
- Don't have to remember who you were with or where you've been if required for tracing
- Automatic deletion of contacts after 21 days
- Needing permission to access contacts – I'm in control
- Bluetooth is familiar technology

What they liked less

- Having 2x tracer Apps on phone (if that's the case?)
- Not everyone has a phone
- Compliance isn't visible
- People may not download the App
- People may turn off Bluetooth function
- App on phone may still connect with GPS – cannot be certain
- Phone upgrade required (current App does not work on older smartphone models – assuming same issues here)
- Wasting battery power
- Using excess data

This relies on people having carrying smartphones with them at all times and having Bluetooth turned on. Most people know that having Bluetooth on constantly will consume your battery faster. Not sure if everyone would be willing to have this on constantly.

Follower

Considerations / questions / improvements

- Would it replace the current App?
- Will my phone store other peoples' details and vice versa?
- How would others be informed that if I test positive for COVID-19. Is it automated? Am I identified

I think its an excellent idea, something that is activated automatically when you enter a place. An extremely efficient method with little input from the user.

Denial

I think its a good idea about the Bluetooth tracing we need all the help we can get to trace n track.

Fluctuator

Perceptions of wearables including the COVID card

Just over half (56%) of New Zealanders are positive about using wearables to help with contact tracing. Support for wearables is highest among older people (70+), Asian New Zealanders, Aucklanders, and those who already use wearables. Women and people under 50 are the least supportive of wearables.

Perceptions of wearables for contact tracing

%



56

Positive about wearables (nett)



Very positive

Fairly positive

Neither positive nor negative

Fairly negative

Very negative

Support for wearables among key demographic groups

The following groups are **more** positive than average about wearables:

- Asian New Zealanders (69% positive)
- People aged 70+ (68%)
- Aucklanders (62%)
- Those who believe contact tracing is important (65%)
- Those who already use wearables (62%)

The following groups are **less** positive than average about wearables:

- Women (53% positive)
- People aged under 50 (51%)

Support for wearables is the same whether this is described only as a COVID card, or based on a wider definition of wearables.



Reasons behind perceptions of wearables

Support for wearables is driven by perceptions of ease and efficiency, followed by greater accessibility than the current COVID tracer App. As with the App, those who do not support wearables are concerned about privacy and data security. Wearables also prompt concerns of the look and size of the wearable. Some are also concerned about forgetting to carry it with them.

Reasons for being positive about wearables (n=345)

Ease and efficiency (nett)	41%
<i>Contact tracing will be quicker, easier</i>	16%
<i>Easy to use</i>	14%
<i>Good for tracking movements, easy to record information</i>	7%
More accessible/easier than current App (nett)	14%
<i>Easier than using the App</i>	7%
<i>Good for those who don't have a smartphone</i>	7%
General positive comments (nett)	22%
<i>Good way to stop virus spreading</i>	11%
<i>Good idea, useful, happy to wear it</i>	9%

Reasons for being neutral about wearables (n=92)

Concerns about privacy, tracking, 'big brother'	10%
Forgetfulness, remembering to take it with you	10%
Need more information first, want to see what it looks like	9%
Good idea, useful, happy to wear it	7%

Reasons for being negative about wearables (n=82)

Trust or data security concerns (nett)	41%
<i>Concerns about privacy, tracking, 'big brother'</i>	34%
<i>Data security, could be hacked</i>	8%
Issues with wearables - look, size (nett)	23%
<i>Don't want to, wouldn't wear it</i>	10%
<i>It's an eyesore, ugly, ridiculous</i>	8%
Prefer to use the App	16%

Note, nett categories shown in bold represent wider themes and more detailed responses within those themes are shown below in italics.

Responses shown by fewer than 7% of respondents not shown.

Base: Refer to each table | Source: Q20. For what reasons do you feel (positive/negative/neither positive nor negative) about wearing a COVID card or other wearable to help contact tracing?

Perceptions of using bluetooth technology through wearables

Again, the qualitative feedback on the wearables backs up much of what the survey respondents said, although it highlights some of the questions and assumptions that people have about how they can carry it (e.g. in a wallet or pocket). If this is not possible then it could reduce compliance.

What they liked

- Less technical proficiency needed. Easier to use than the App
- Easier to use for the less tech. proficient
- Easy to carry around
- No action needed – automatic
- Not everyone has a phone so better for these people
- Visibility of wearable will exert social pressure on people to comply
- Gets away from manual sign-ups which can be cumbersome for people

For those that may not have a smart phone, it's a great idea as they wouldn't need to sign forms every time they leave their house.

Qualboard participant, Attainer

What they liked less

- Forgetting to wear the wearable when they leave the house – particular concerns around younger/older people
- If in a card form around the neck, it would get in the way
- Nuisance – an extra thing to remember to leave the house with
- People swapping them
- Misplacing and losing them
- The cost to the tax payer to manufacturer/replace lost wearables
- The way it looks – don't want to wear something that's unsightly or gets in the way

I even forget to wear my work lanyard. I would forget to take it with me. I don't like the idea of 'dog tags' around my neck and would not do this unless it was compulsory. I much prefer the Bluetooth facility on my phone. People would lose them, swap them - what a possible mess!

Qualboard participant, Fluctuator

Considerations / questions / improvements

- Can I just pop the card in my wallet or pocket?
- How will you ensure everyone registers their card?
- How would others be informed that if I test positive for COVID-19. Is it automated? Am I identified?
- Can anyone with a Bluetooth reader see my person details if the scan or connect to my card?

Does not look nice to wear around the neck, stands out too much. Would be better if not seen. Good that you don't have to rely on your phone's Bluetooth.

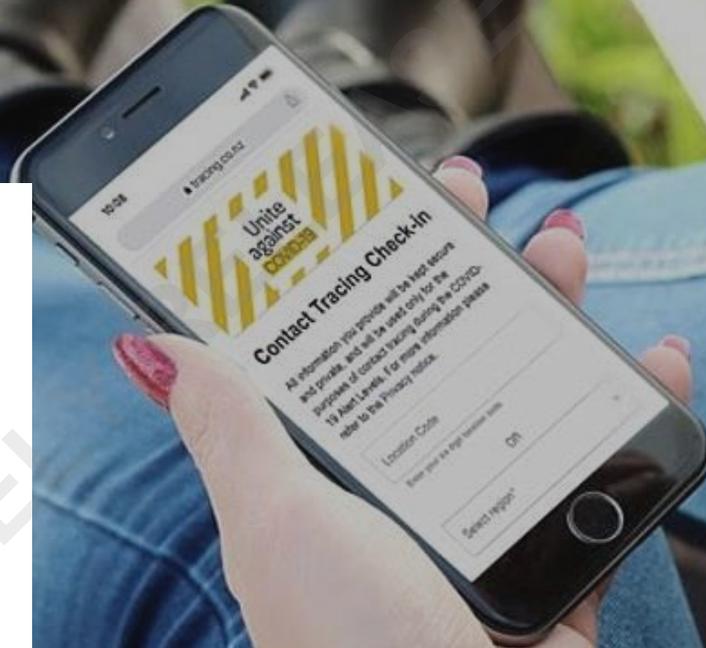
Qualboard participant, Follower



**COLMAR
BRUNTON**

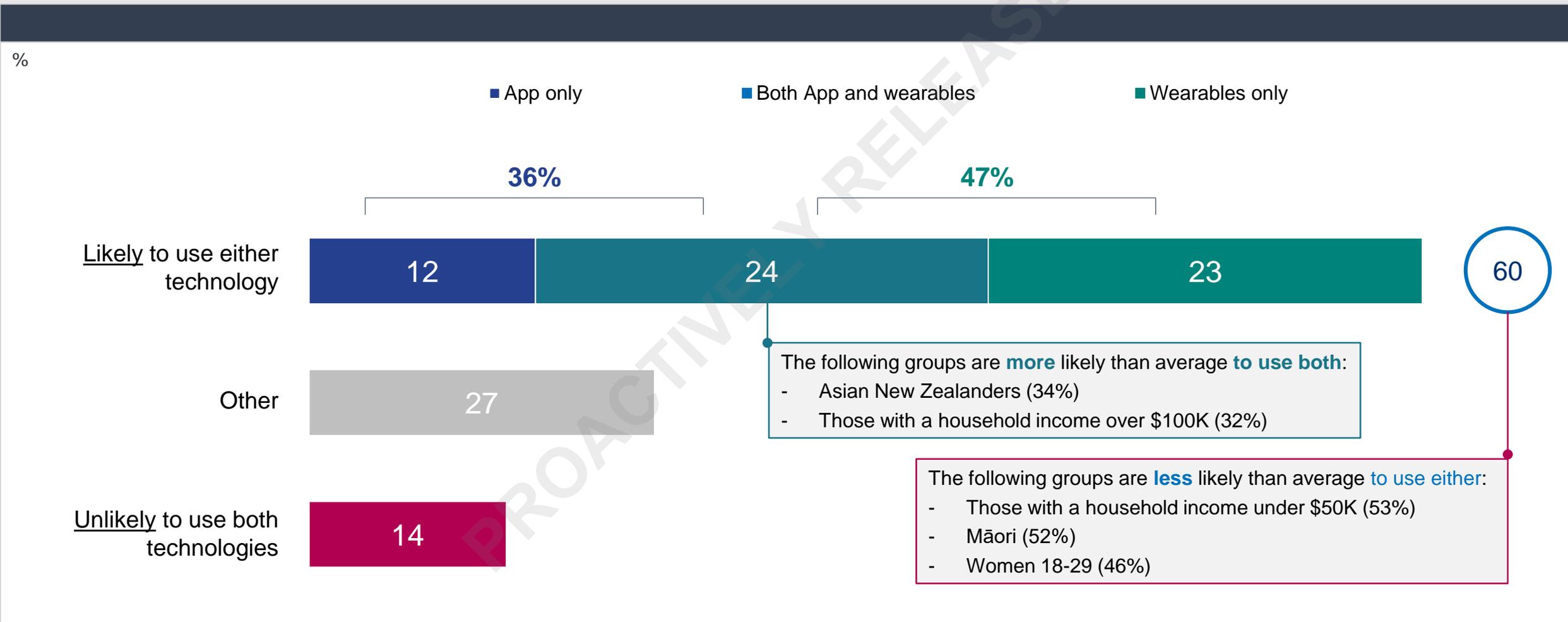
A Kantar Company

Likelihood to use technology



Overall likelihood to use contact tracing technology

Six in ten (60%) New Zealanders say they are likely to use either the App or wearable. Almost a quarter (24%) say they are likely to use both. One in seven (14%) New Zealanders are unlikely to use either the App or the wearable. Māori are less likely to use either option.



Base: All respondents (n=1,302)

Source: Q13. How likely, or not, would you be to download the App and then enable the Bluetooth function to record your contacts? | Q23. And how likely would you be to consistently wear your COVID card or other wearable when you leave your home?

A note of caution on the preference for wearables

Different approaches to implementing Bluetooth tracing can signify different things in the minds of New Zealanders. There is a distinction between the card being on show and not. In the qualitative research respondents often assumed it could be popped into their pocket or their wallet. If this is not the case then it might undermine some of the willingness to carry it.



Phone / App

Card *(not on show)*



Wearable

*I am in control
No obligation to show
Maintains sense of freedom
Don't feel like I am conforming to rules / regulations*

BUT...

*Will the lack of visibility be an issue?
How do we know if people are "signed in" when moving about NZ
May be seen as invasive to privacy i.e. data on phone*

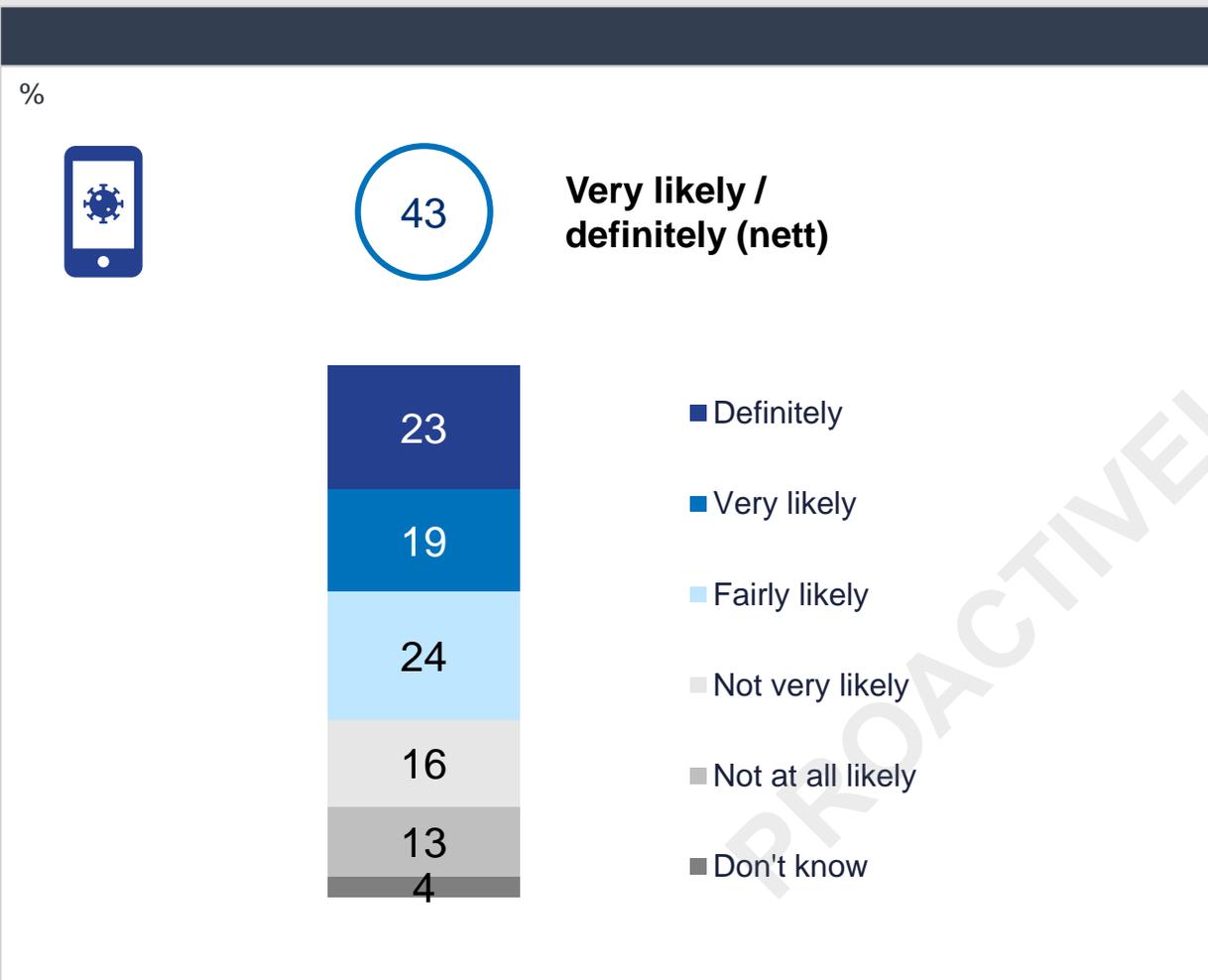
*You telling me what to do
Clear sign of compliance
Impedes on sense of identity*

BUT...

*Less invasive to data privacy
Shows others I care/ in this together*

Take-up of the App and enabling Bluetooth to record contacts

Just over four in ten (43%) New Zealanders with a smartphone are likely to enable the Bluetooth function to record their contacts. A further quarter (24%) are receptive but not convinced they will take this action. Māori, New Zealand Europeans and those with a lower household income (under \$50K) are least likely to use this method of contact tracing.



Take-up of the App among key demographic groups

The following groups of smartphone users are **more** likely than average (43%) to enable Bluetooth in the App:

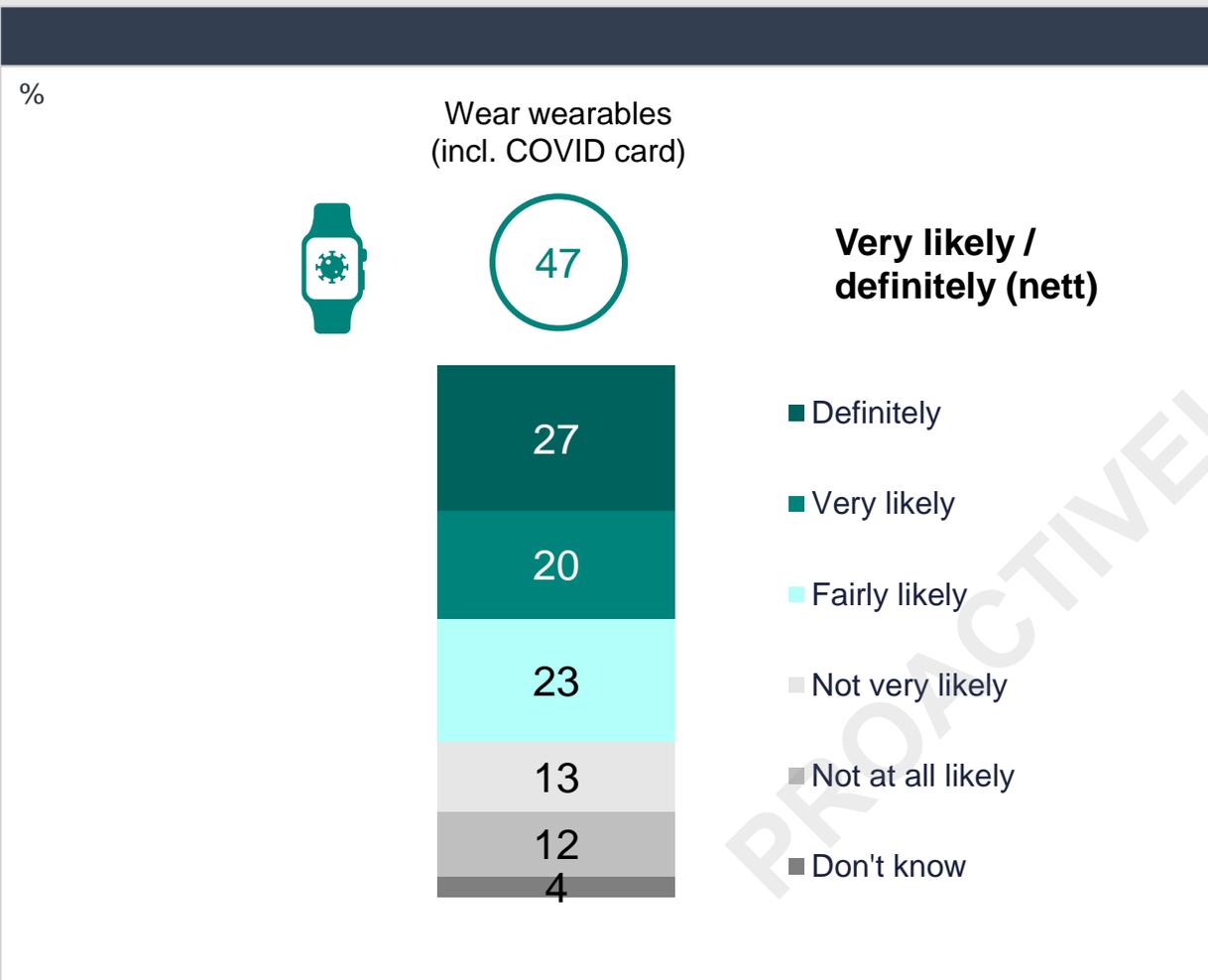
- Men aged 70+ (59%)
- Those who believe contact tracing is important (54%)
- Those with a household income over \$100K (53%)

The following groups of smartphone users are **less** likely than average (43%) to enable Bluetooth in the App:

- Those who are not confident using technology (17%)
- Those with a household income under \$50K (33%)

Take-up of wearables

Just under half (47%) of New Zealanders are likely to consistently wear their COVID card or wearable when leaving home. As with the App, a further quarter (23%) are receptive but need more convincing. People under 50, in particular women under 30, and Māori are least likely to use wearables for contact tracing.



Take-up of wearables among key demographic groups

The following groups are **more** likely than average (47%) to use wearables:

- Those aged 50+ (56%), particularly those aged 70+ (62%)
- Men aged 70+ (70%)
- Asian New Zealanders (56%)
- Those who believe contact tracing is important (57%)

The following groups are **less** likely than average (47%) to use wearables:

- Women under 30 (34%)
- Māori (39%)
- Those aged under 50 (40%)

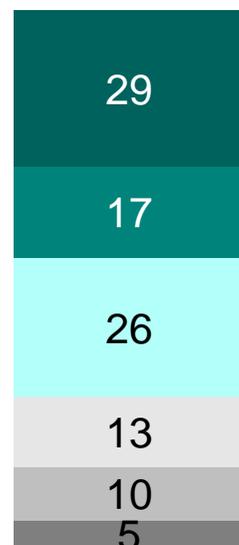
Ability and likelihood of registering wearable

Almost half (46%) of those who are online are likely to register their details if they received a wearable. Fifty people were also surveyed via phone who do not use the internet and would therefore have greater difficulty registering their details for a wearable. A majority (79%) of those who are not online know someone who could register it on their behalf. A further 18% have access to community services which could assist them (such as a library or Citizen's Advice Bureau). Only one of the 50 respondents (2%) said they cannot easily access assistance.

Among online audience*

%

Register details for wearable device



Very likely / definitely (nett)

- Definitely
- Very likely
- Fairly likely
- Not very likely
- Not at all likely
- Don't know

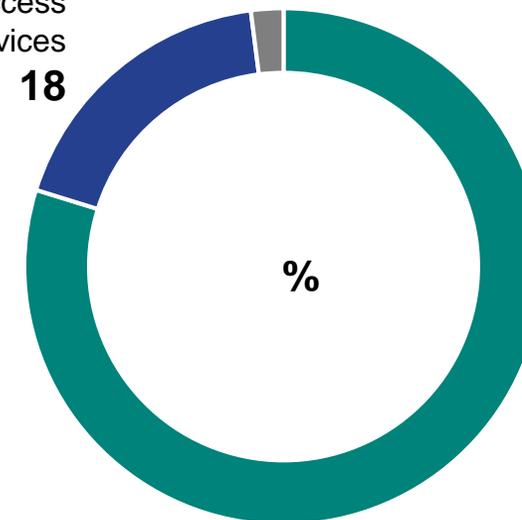
Among offline audience**

Don't know someone who could register for them but can easily access community services

18

No easily accessible assistance available

2



Know someone who could register wearable on their behalf

79

Use of contact tracing technology by perceptions of risk

Willingness to use each technology for contact tracing is dependent on the perceived proximity of risk. That is, people are more willing to adopt these technologies when there are COVID-19 cases in their community or region. While over 80% would be willing to use these when there are cases in their community, willingness drops to around half when there are cases, but not nearby.

Would you be willing to use this if there were...



Cases of COVID-19 in my community

Cases of COVID-19 in my region but not in my community

Cases of COVID-19 in New Zealand but not in my region

No cases of COVID-19 in New Zealand (as a precaution)



COVID App

82%

72%

52%

41%



Wearables

87%

76%

54%

40%

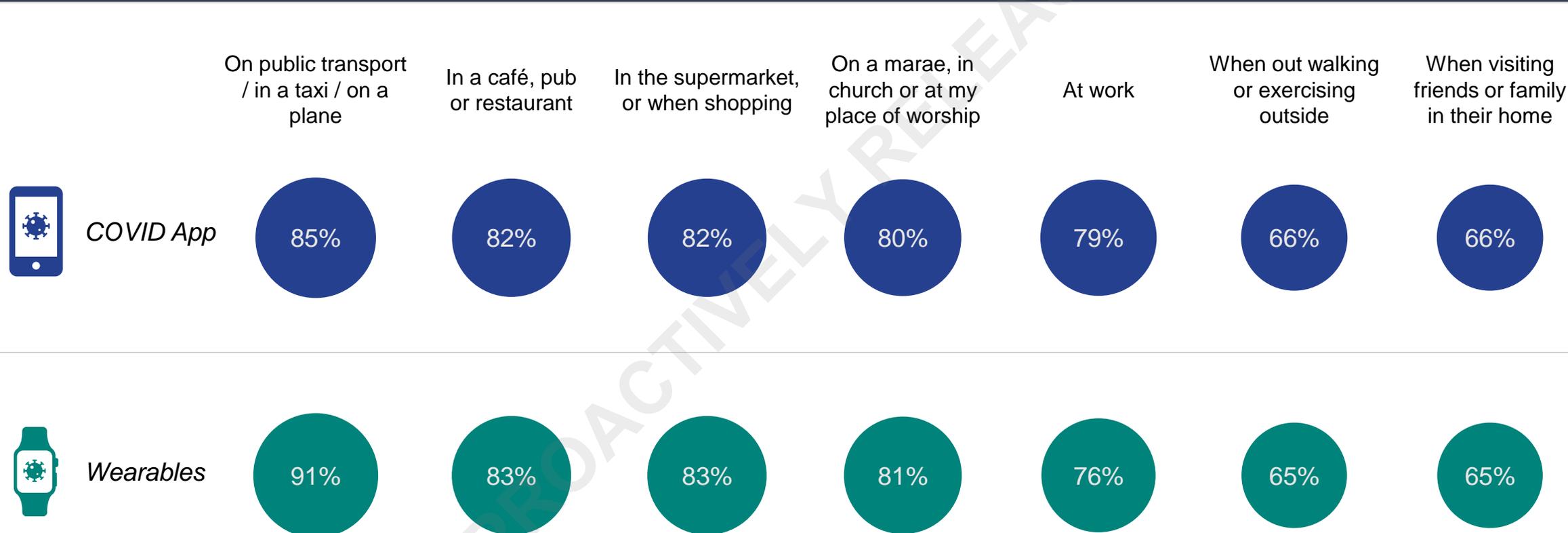
Base: All respondents excluding those who are not at all likely to use each technology (n=1,046 for App and n=1,169 for wearables)

Source: Q13a. Would you be willing to allow the Bluetooth function on the App to record your contacts if there were...? | Q23a. Would you be willing to wear the COVID Card to record your contacts if there were...?

Use of contact tracing technology in different situations

Most New Zealanders (80% or more) are willing to use the contact tracing technology when they are in close proximity to strangers. Willingness to use the technology drops when they are in contact with people they know (such as colleagues, friends or family) or in outside spaces. Over two-thirds would still use contact tracing technology in these situations.

Would you be willing to use in the following places...

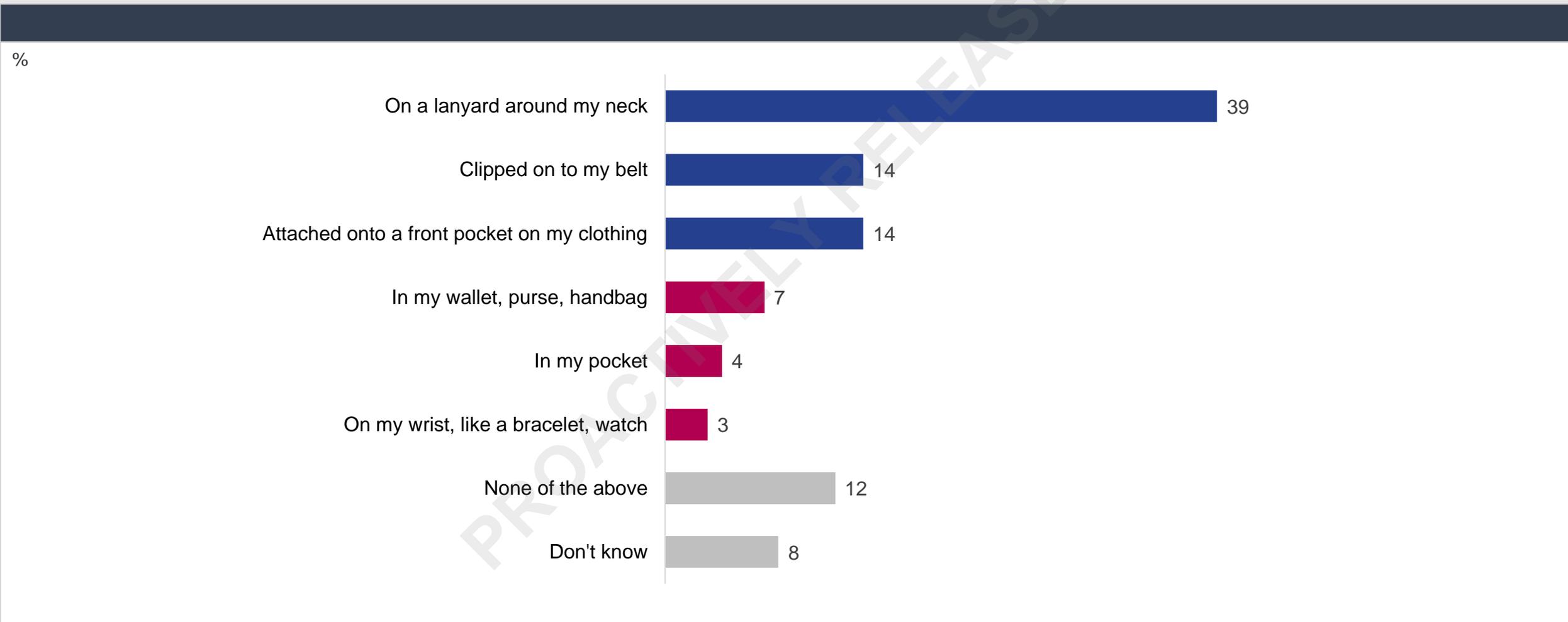


Base: All respondents excluding those who said they are not at all likely to use the App or who said they go to these locations (n=821 for App and n=1,157 for wearables)

Source: Q13b. And, in which of the following places would you be willing to have the Bluetooth function on the App switched on? | Q23b. And, in which of the following places would you be willing to wear the COVID card or other wearable?

Preferred method of wearing a wearable

Two thirds (67%) of those who are likely to use a wearable are willing to wear it around their neck, on their belt or attached to a front pocket. These are the optimal methods of wearing for the COVID card to be effective. Almost one in ten (9%) would prefer to wear it another way, in particular to carry it in their wallet or handbag.





**COLMAR
BRUNTON**

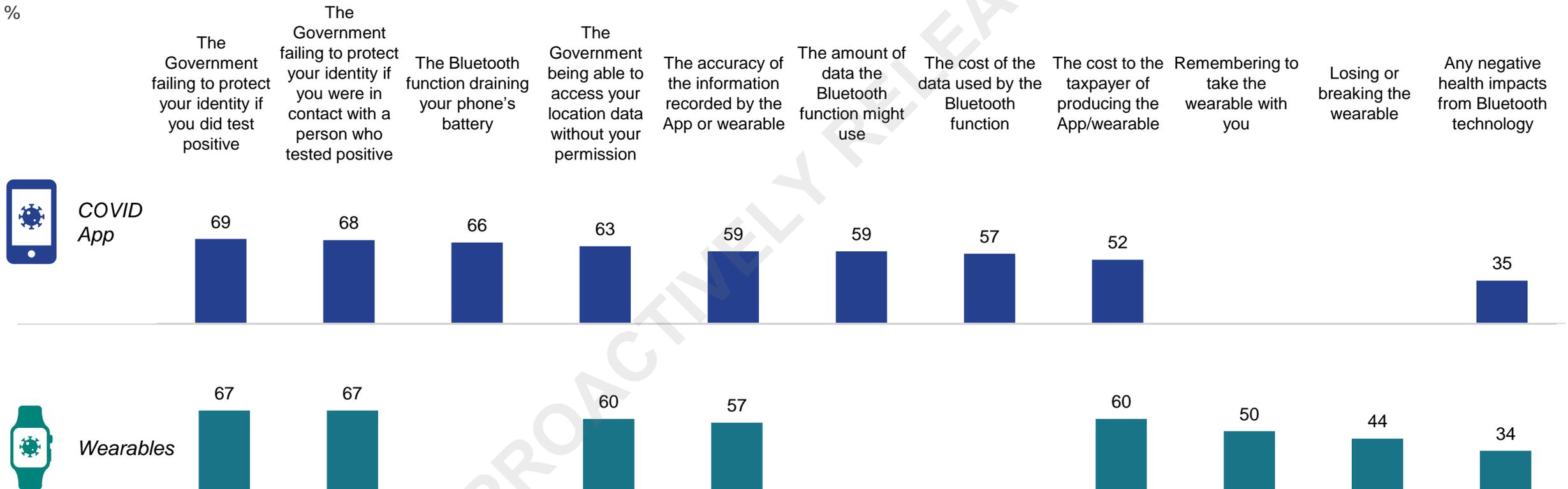
A Kantar Company

Barriers / drivers to using technology

Barriers to use for each technology

For both the App and wearable, over two thirds of New Zealanders have concerns about the Government protecting their identity if they, or someone they had contact with, tested positive for COVID-19. Six in ten are also concerned about the Government being able to access their location data. There is greater concern over the cost to the taxpayer for the wearable technology than the App.

Imagine you did download the App and enable Bluetooth function or received a COVID card or other wearable. How concerned would you be about...



Base: All respondents (n=1,302)

Source: Q14. Imagine you did download the App and enable the Bluetooth function. How concerned or not would you be about ...?

Q24. Imagine you did receive a COVID card or other wearable and were asked by the Government to wear it. How concerned or not would you be about ...?

Demographic examination of concerns for the App and wearables

Māori are particularly concerned about the Government being able to access location data for both the App and wearables. Women and Pacific people are more concerned about the practical aspects of using the App or wearable, such as remembering to take the wearable with them or the impact of using Bluetooth on battery, data usage and cost of data. Both Pacific and Asian New Zealanders are concerned with negative health impacts of Bluetooth technology for both the App and wearables.

Concerns about the App and wearables - Demographic differences

	Concerns about App %	Concerns about wearables %	More likely among the following groups:
The Government failing to protect your identity if you did test positive	69	67	No demographic differences
The Government failing to protect your identity if you were in contact with a person who tested positive	68	67	Pacific (77% for wearables)
The Bluetooth function draining your phone's battery	65	-	Women (69%), People under 50 (71%), Pacific (77%)
The Government being able to access your location data without your permission	63	60	Māori (73% for the App, and 68% for the wearable)
The accuracy of the information recorded by the App or wearable	59	57	Pacific (72% concerned about App)
The amount of data the Bluetooth function might use	59	-	Women (66%) - particularly women under 50 (70%), Pacific (70%)
The cost of the data used by the Bluetooth function	57	-	Women (61%), Pacific (70%)
The cost to the taxpayer of producing the App/wearable	52	60	Asian New Zealanders (61% for the App), Women (63% for wearables), Pacific (74% for wearables)
Remembering to take the wearable with you	-	50	People under 30 (62%) – particularly women under 30 (69%), Pacific (61%)
Any negative health impacts from Bluetooth technology	35	34	Pacific (62% for the App, 56% for wearables), Asian New Zealanders (48% for the App, 49% for wearables)

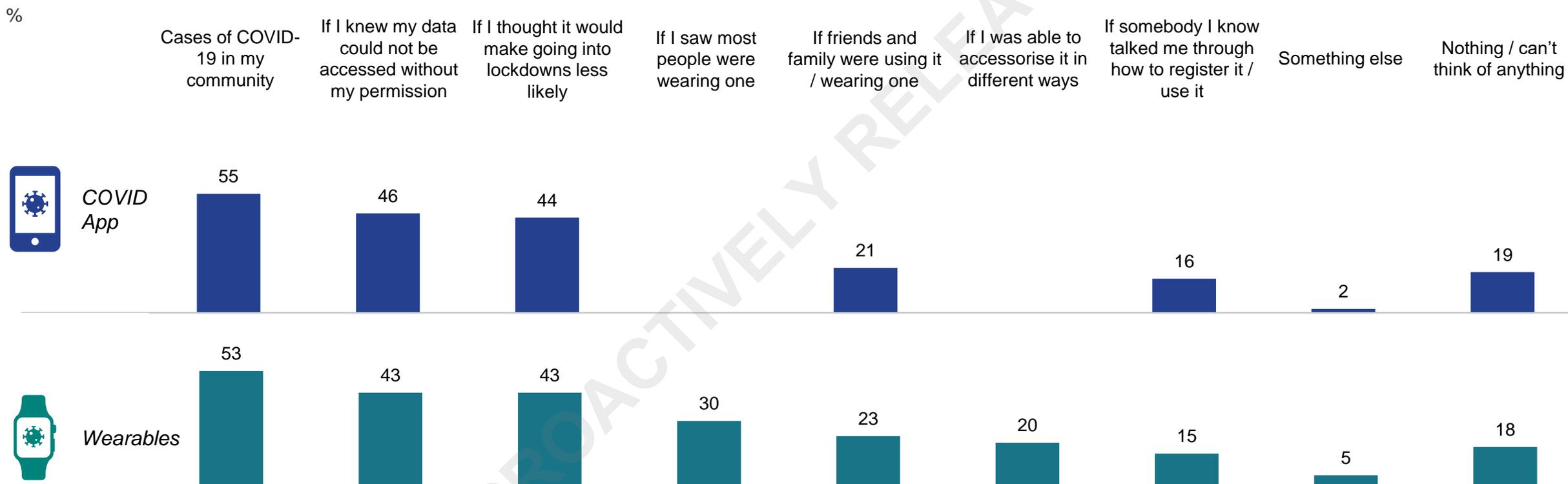
Base: All respondents (n=1,302)

Source: Q14. Imagine you did download the App and enable the Bluetooth function. How concerned or not would you be about ...?

Factors which would encourage use of each technology

Those who were not definite about their likelihood to use the App or wearables were asked what might encourage them to do so. Proximity of risk is a key motivator, followed by the knowledge that their data is secure. Just over four in ten would also be motivated by these technologies making lockdown less likely.

What, if anything would encourage you to download and use App or wear the COVID card or other wearables?



Base: Respondents who are not convinced about using the App (n=781) or wearables (n=870).

Source: Q15. What, if anything, would encourage you to download and use the App? | Q25. What, if anything would encourage you to wear the COVID card or other wearables...?

Demographic examination of factors that would encourage the use of the App or wearables

NZ Europeans are more motivated to use wearables if their risk increases due to community cases of COVID. Older people (over 70) would be more motivated to use both the App and wearables if lockdowns were less likely and if their family and friends were using them. People over 70 also would like more support with using or registering both the App and wearables. Creating a social norm around wearables is particularly important for people under 30 to make them feel comfortable, as it is for the over 70s.

Factors that would encourage the use of the App and wearables - Demographic differences

	App %	Wearables %	More likely among the following groups:
Cases of COVID-19 in my community	55	53	NZ Europeans (57% for wearables)
If I knew my data could not be accessed without my permission	46	43	No demographic differences
If I thought it would make going into lockdowns less likely	44	43	People over 70 (65% for the App, 64% for wearables), those with household income over \$100K (51% for the App)
If I saw most people were wearing one	-	30	People under 30 (39%) and people over 70 (44%)
If I saw my friends and family were using the App/wearing one	21	23	People over 70 (42% for the App, 50% for wearables)
I was able to accessorise it in different ways	-	20	Women over 70 (42%)
If somebody I know talked me through how to register it and use it	16	15	People aged 50-69 (22% for the App) and people aged over 70 (44% for both the App and wearables), those living in rural areas (30% for the App), those with household income under \$50K (22% for wearables).



**COLMAR
BRUNTON**

A Kantar Company

Measuring commitment to bluetooth technologies



Introducing the commitment segmentation

We measure commitment to help understand the 'gap' we often see between values or intention and actual behaviour. New Zealanders can be segmented into one of **six groups** to show their level of commitment to using Bluetooth technology to record their interactions outside of the home. A summary of each of the six segments is presented below.

ADVOCATES



"Let me tell you."

ABIDERS



"I'll do my bit."

FLUCTUATORS



*"Of course...
But maybe ..."*

FOLLOWERS



*"I'll do what
she's doing."*

DIFFICULT



*"No way am I
changing."*

DENIAL



*"Problem?
What problem?"*

HOW WE MEASURE COMMITMENT

We look at four key aspects of commitment:

- Cognitive dissonance – we can explore whether people are feeling 'comfort' or 'discomfort' with the idea of using a card or App for contact tracing
- External influence – we can explore the extent to which people believe it would be difficult to use the card or App, even if they really wanted to
- Ambivalence – we can explore whether people are torn when they think about using it, identifying more reasons for or against
- Involvement – we can determine the extent to which people consider contact tracing as something that is important to them personally.

A NOTE ON THE SAMPLE

The segmentation questions were answered by those who participated in the online survey (1,002 respondents) and the pilot for the telephone survey (44 respondents). To help manage the length of the telephone survey they were removed after the pilot.

This total sample of 1,046 interviews was weighted separately to be nationally representative in order that we could analyse with confidence.

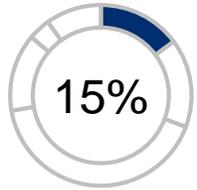
Levels of commitment to consistently 'using' an App or wearables

Commitment levels for each technology is relatively similar. The majority fall into the middle two segments for both technologies, with Fluctuators clearly the largest single segment. If either (or both) technologies are to reach a critical mass, then efforts need to be placed in pushing Fluctuators into the more committed segments. We explore this key audience in further depth from slide 52.

Commitment to using an App

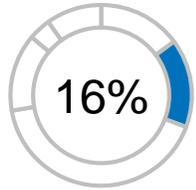


ADVOCATES

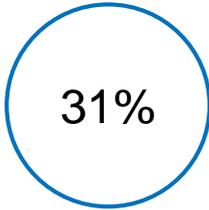


+

ABIDERS



=

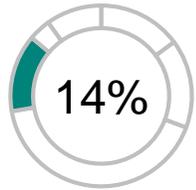


FLUCTUATORS



+

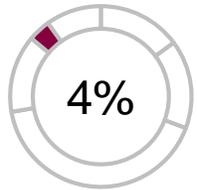
FOLLOWERS



=

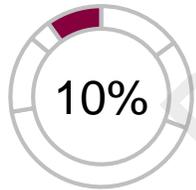


DIFFICULT



+

DENIAL



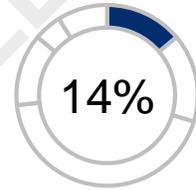
=



Commitment to using wearables

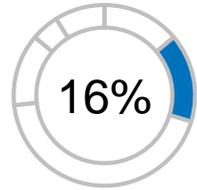


ADVOCATES

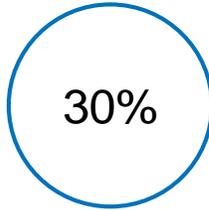


+

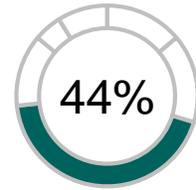
ABIDERS



=

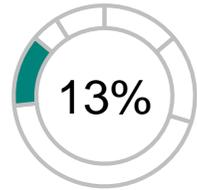


FLUCTUATORS

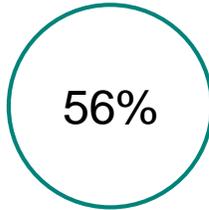


+

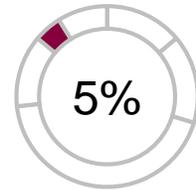
FOLLOWERS



=

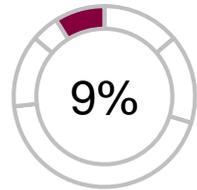


DIFFICULT

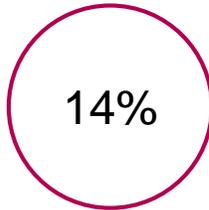


+

DENIAL



=



An overview of how the commitment segments perceive the technologies



Phone / App



Wearable

ADVOCATES + ATTAINERS



They welcome the Bluetooth technologies.

The technologies provide two levels of safety, improve our systems and provide more effective tracing. Wearables often not seen as ideal, they would rather not ...but a minor inconvenience for a greater good.

FLUCTUATORS + FOLLOWERS



They are broadly accepting of Bluetooth for improved tracing. However, they are not fully convinced that data collected wont be used otherwise.

Want to do their bit but don't want to be seen to be fully compliant to government. Wearables often seen as a bit of a step too far – why do we need them on show?

DIFFICULT + DENIAL



Bluetooth is broadly seen as an invasion of privacy – 'big brother' is watching your movements.

Wearables are often seen as taking a sense of freedom away.

They are concerned about what follows in terms of enforcement i.e. police checks / fines.

Who are the Fluctuators?

As noted the Fluctuators are the largest single commitment segment for both technologies. They account for between 42% (the App) and 44% (wearables) of New Zealanders. Their demographic profile is generally in line with the national population. They do skew somewhat towards younger women, and are slightly less likely to be in the lower income brackets. Fluctuators for the App have a slightly higher level of comfort with technology than average. There are no skews by ethnicity or region.

App Fluctuators



Young women (18-29) are somewhat over represented

14% vs. **11%** overall

More likely to be middling income households, with an annual income of \$50k+

81% vs. **75%**

More confident using digital tech

94% vs. **90%**

There are no significant differences by ethnicity or region

Wearable Fluctuators



Younger women (aged 18-49) are over represented

35% vs. **28%** overall

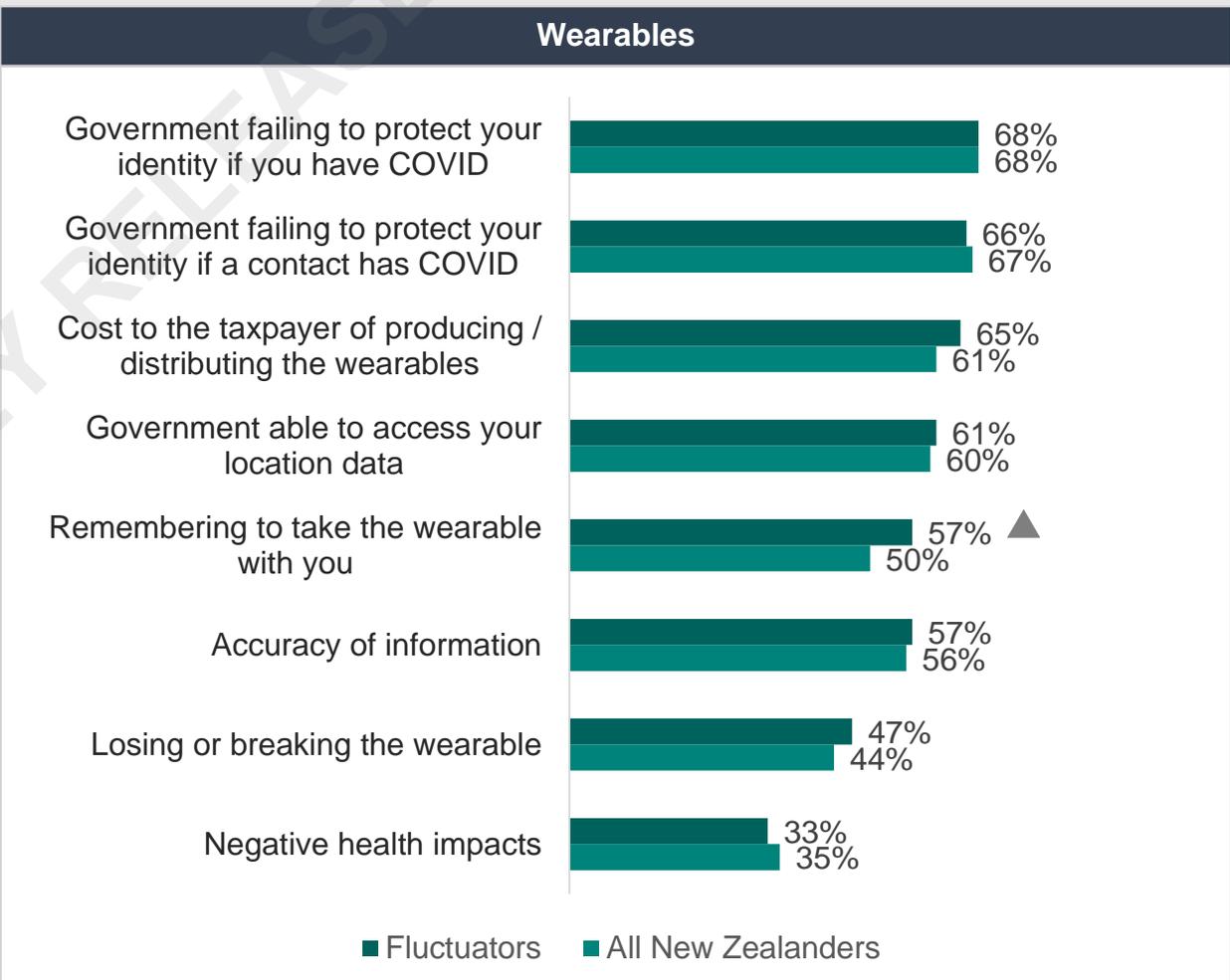
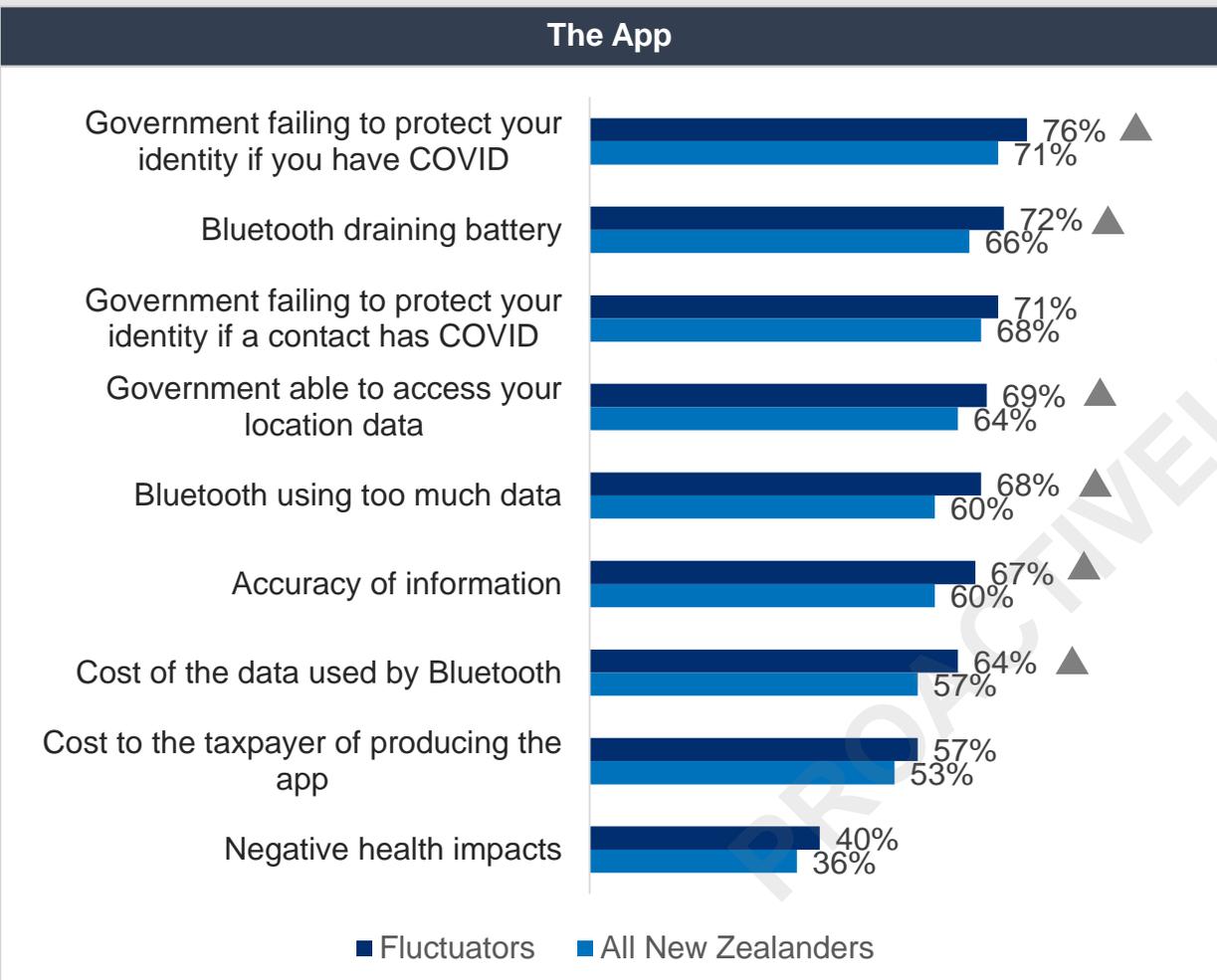
More likely to be higher income households, with an annual income of \$70k+

67% vs. **61%**

There are significant differences by ethnicity or region

Fluctuators key concerns about using COVID tracing technologies?

Fluctuators' concerns around either technology reflect those of the wider population, albeit they are often more keenly felt. In particular, App Fluctuators feel more concerned about a range of barriers than all New Zealanders. The pattern of concerns (for both technologies) mirrors the wider population with concerns around data privacy paramount. For the App some practical considerations exist around battery life and data use, whereas for wearables cost is also a notable concern. The implication is that the wider strategy required to convince New Zealanders more broadly to use these technologies will likely resonate with Fluctuators.



Base: All respondents with smartphone for App chart (n=413 for Fluctuators and n=969 for All New Zealanders); All respondents for Wearables chart (n=474 for Fluctuators and n=1,046 for All New Zealanders)

Source: Q14. Imagine you did download the App and enable the Bluetooth function. How concerned or not would you be about ...?

Q24. Imagine you did receive a COVID card or other wearable and were asked by the Government to wear it. How concerned or not would you be about ...?

▲ Significantly higher than average.

Fluctuators key concerns about using COVID tracing technologies?

Fluctuators echoed these concerns in the qualitative research referencing issues around data security, battery life (for the App), and some of the practicalities of remembering to take a wearable with you, losing it or feeling comfortable wearing it. There is not outright hostility to the use of these technologies but Fluctuators do identify reasons for not participating. There appears to be a clear tension between technology that is known and offers a sense of control (the phone and App), and what is easy (wearables).

FLUCTUATORS



I believe people would feel uneasy about the storing of their personal whereabouts and activities. I think these are very understandable reasons. The more technical side of technology is not something that the average person knows much about and that fact in and of itself can make people wary. Not knowing how something works and how this information could feasibly be used.

Qualboard participant, Fluctuator

As mentioned in my previous answer, being a card, will mean an extra thing to remember to take out, and another thing which can be lost, dropped etc. Would it interfere with other Bluetooth devices... how big is it, how does it look, does it need to be visible, will it clash with the outfit, occasion etc. If this is to go ahead, I would prefer to have it attach to a device everyone already uses, than an extra one.

Qualboard participant, Fluctuator

It comes down to security of the person and their information. This may be just a general belief or may be based on their previous experiences - I can't make a comment on whether these are valid or not without knowing a person's individual circumstance. Passwords need to be secure, the database needs to be secure.

Qualboard participant, Fluctuator

This wearable eliminates my concern about having Bluetooth enabled on my phone at all times and the battery issues that come with that which makes it more appealing. It also feels a little more secure in some ways than an App (I'm not entirely sure why). However, the idea of having to wear a card around my neck or on a belt etc is not particularly appealing to me.

Qualboard participant, Fluctuator

Any approach, if it is to be widely used, needs to be easy and convenient while still reassuring people that the information gathered will be safe and only used if needed. My main concern would be that keeping Bluetooth enabled on my phone drains its battery significantly more quickly.

Qualboard participant, Fluctuator

I would use it the only problem with Bluetoothing is it can drain your phone battery which could be a problem.

Qualboard participant, Fluctuator

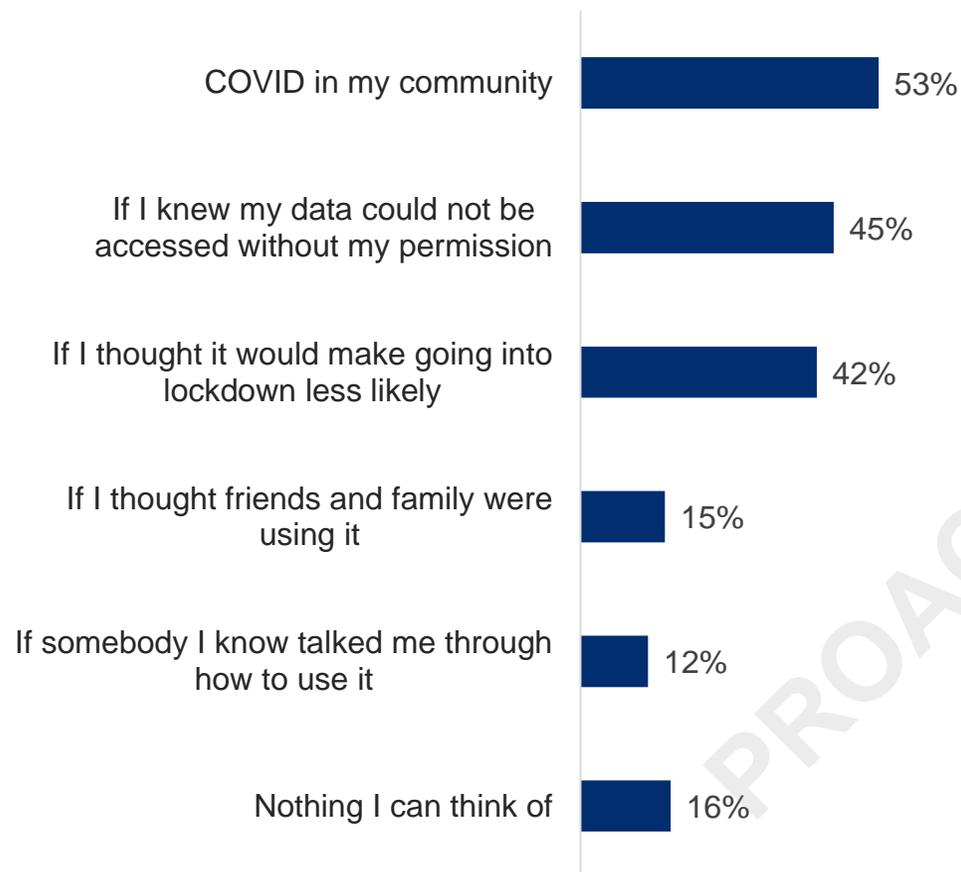
I still would not be happy to use any device that I needed to wear. Thinking of times like going to the beach etc. Will people lose it? Swap them? I am happy with the Bluetooth idea as it means I do not need to actively do anything - it happens while I get on with my life.

Qualboard participant, Fluctuator

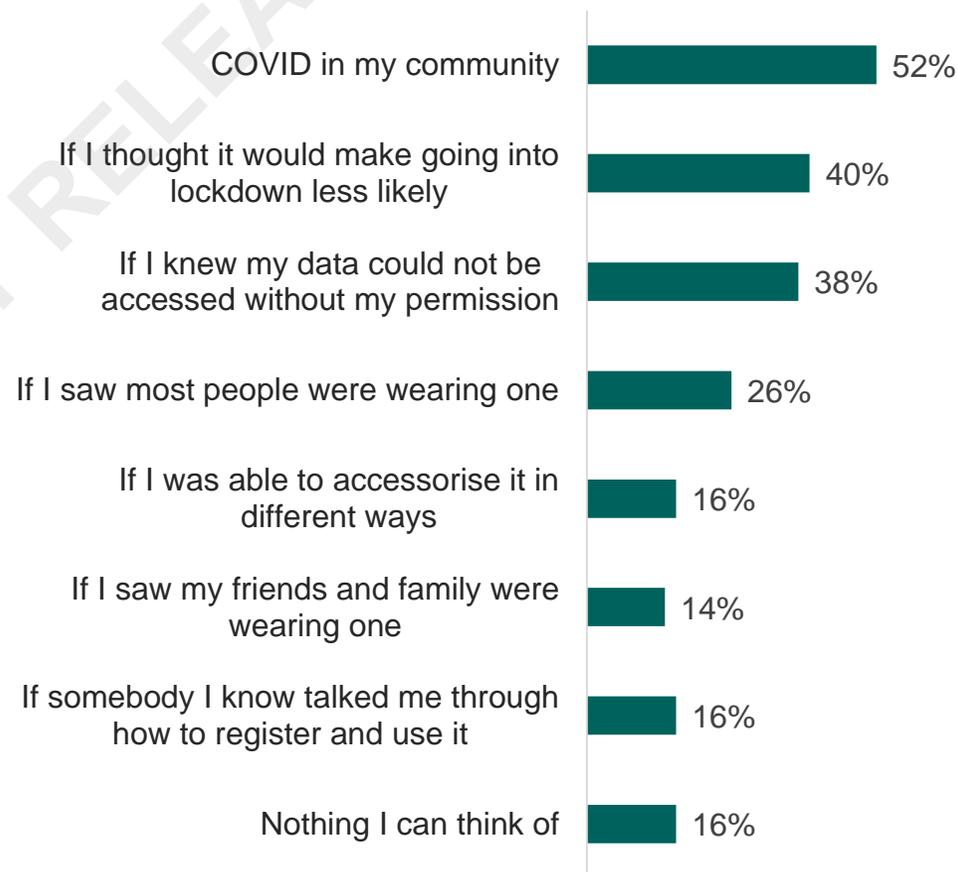
What will encourage Fluctuators to take-up COVID tracing technologies?

Fluctuators' who are not fully on board can be pushed towards using the technologies. The key factors which will make a difference (irrespective of the technology) is a heightened sense of risk, as well as the prospect of avoiding lockdown and reassurances around data protection. When it comes to wearables, the creation of social norms (seeing others wear one) can also provide a nudge. There are no significant differences between Fluctuators and all New Zealanders (as such the charts only include data for the Fluctuators). What works for the masses will work for Fluctuators.

The App



Wearables



What will encourage Fluctuators to take-up COVID tracing technologies?

To encourage uptake communications amongst Fluctuators it will be critical to emphasise the following key messages: their data is secure; they are in control of their data; and the technology traces their contacts, it does not track their movements. The tension between what is known, and what is easy, propels some Fluctuators to call for choices in the technologies they have available to them. As noted by the quantitative research this could be vital in extending its reach.

FLUCTUATORS



If it is guaranteed that your data isn't shared with others, and others can not access your data, it will give people a better peace of mind. Therefore, I would prefer the phone idea than the card.

Qualboard participant, Fluctuator

Like the fact that data is stored locally within the App. makes me feel more secure using it and more people will like that the wearable doesn't track you.

Qualboard participant, Fluctuator

I feel happier knowing that the information can only access my data with my permission, and that it does not track my movements.

Qualboard participant, Fluctuator

It sounds like a better system than the current one of having to remember to check in, having to do it manually. I prefer things to be done automatically, then you don't rely on the person. All about convenience.

Qualboard participant, Fluctuator

I think whatever is rolled out needs to be easily accessible. Possibly different ways to use it or different types of tech where you can chose what suits you. (e.g. if I wanted to use an App, or had a card that I could scan - then I could use one or the other but they both talk). Assurance wise, I'd need to know my data is protected, and that there was no cost associated to the technology. (e.g. even the need to have data to use it.)

Qualboard participant, Fluctuator

It sounds like a good idea, my initial response was that I didn't want my cell phone to be picking up other devices close by. But on thinking it through I decided that the important thing is to keep everybody safe in times like these, so maybe we have to accept things that we wouldn't normally do. So I would be willing to use it while we have the pandemic, as it looks as if it would be a reliable quick way to find contacts.

Qualboard participant, Fluctuator

My concern about some kind of "wearable" would be remembering to wear it. Most people do remember to take their phones out with them so I think an App on a smartphone would work better in the majority of cases but then, we are back to the problem of being comfortable about the information that is able to be accessed. Perhaps a choice of methods would be best.

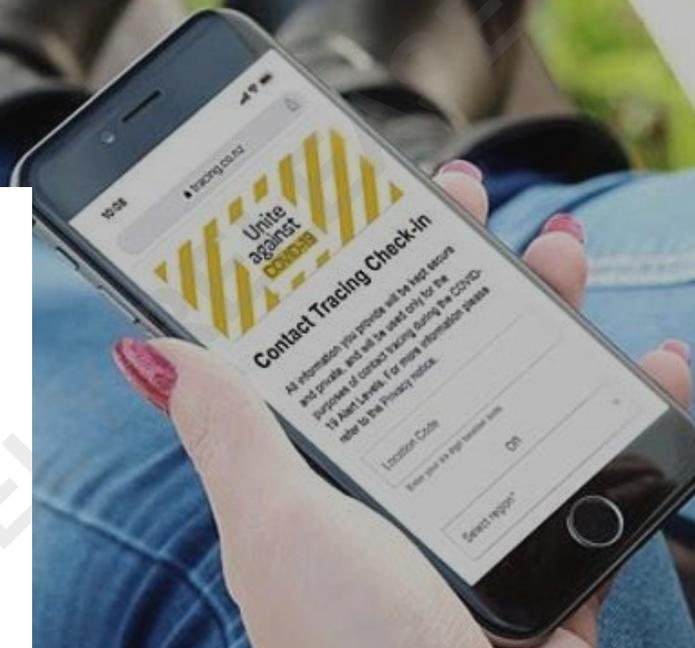
Qualboard participant, Fluctuator



**COLMAR
BRUNTON**

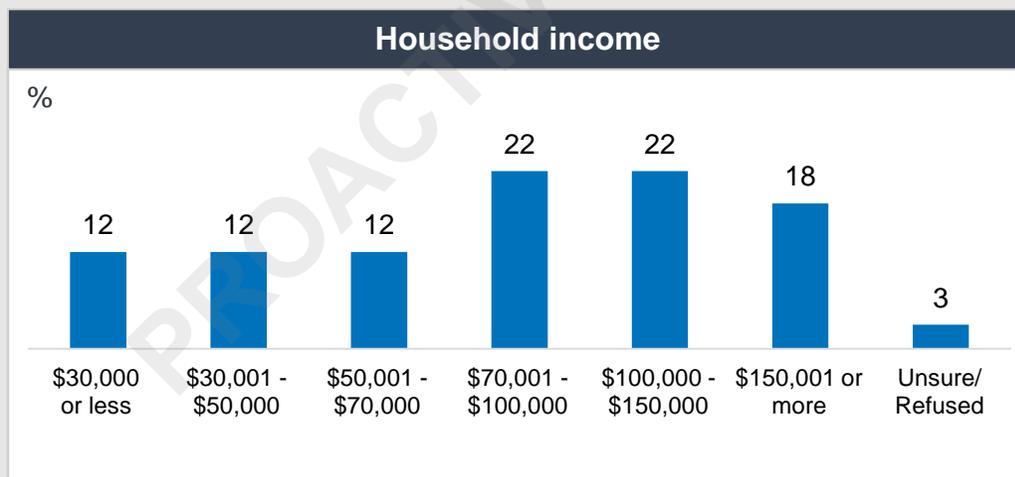
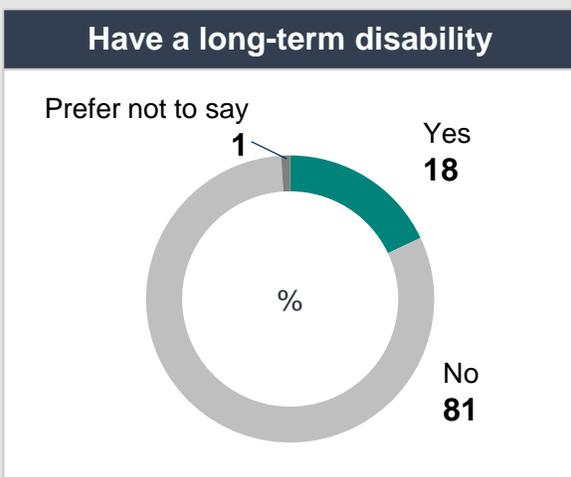
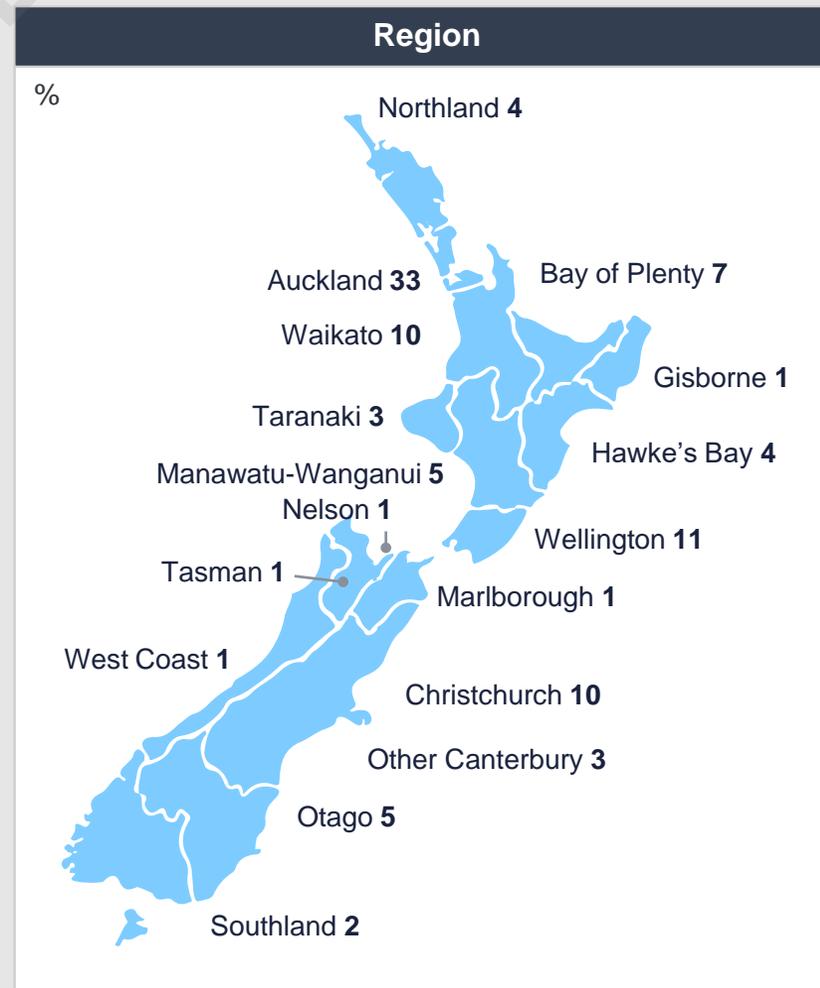
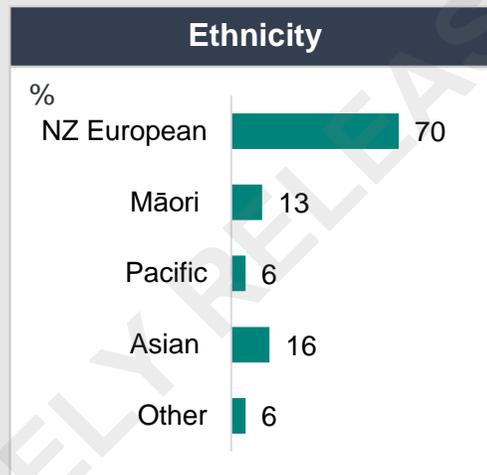
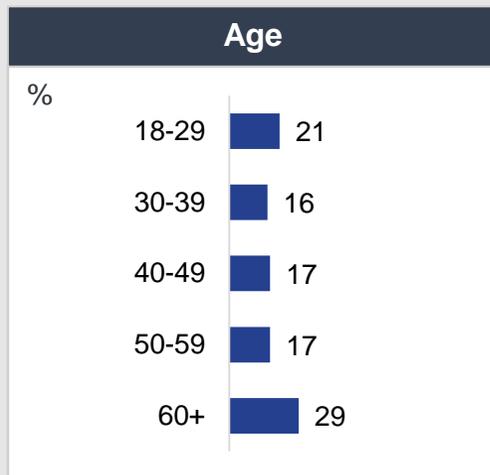
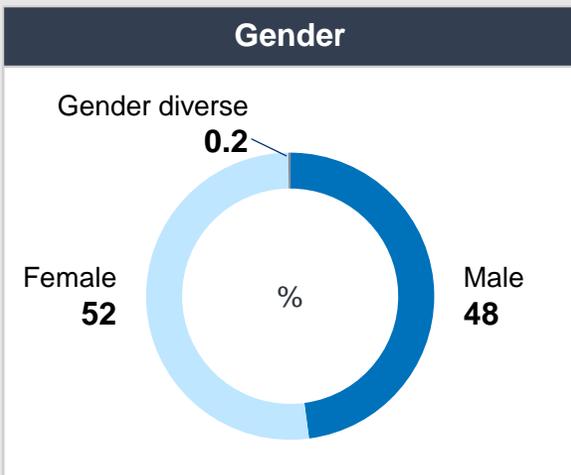
A Kantar Company

Appendix



Quantitative phase - Sample profile

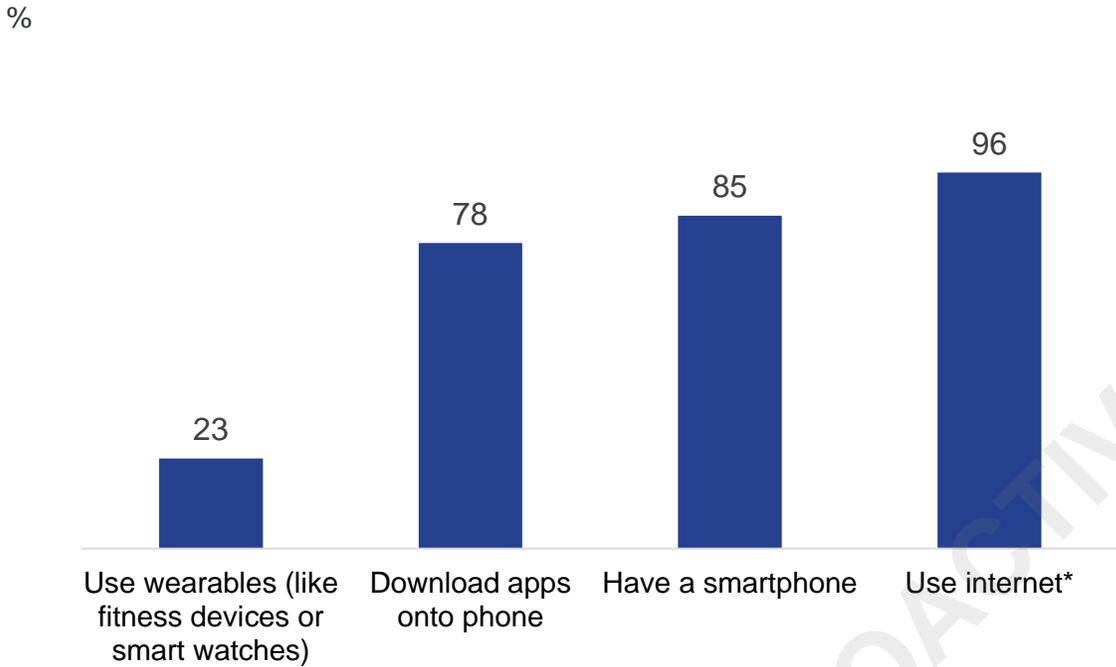
The quantitative survey (both phone and online) has been weighted to be representative of the New Zealand population aged 18+ in terms of age and gender, ethnicity, region and household income by household size.



Technology profile

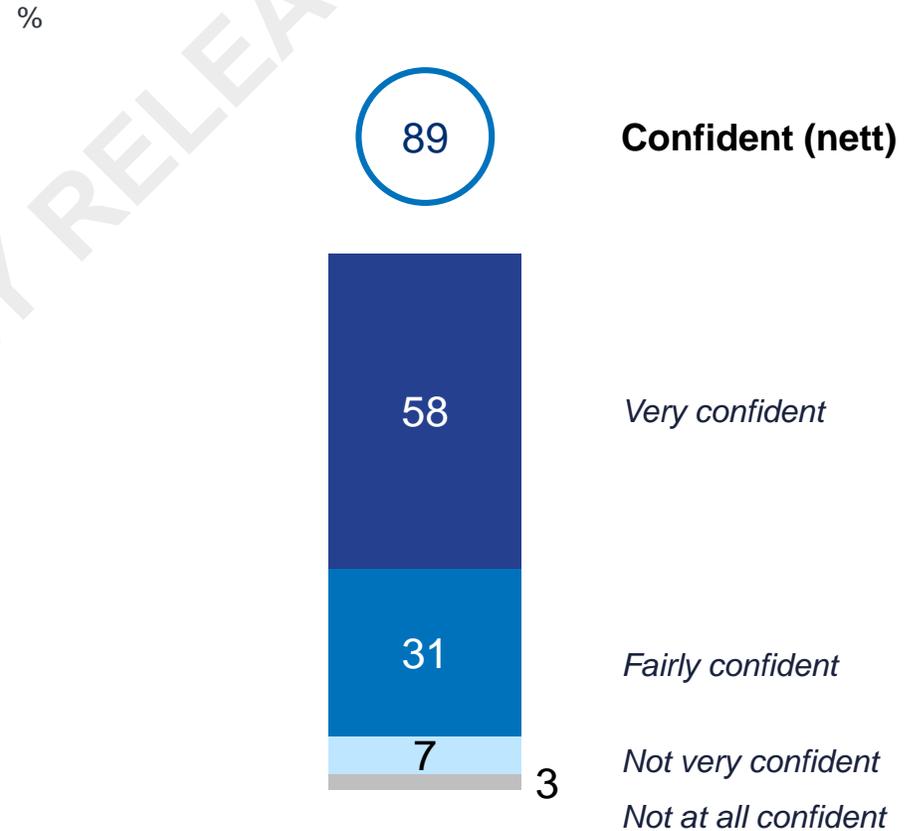
Below is a snapshot of quantitative survey respondents' technology profile.

Use of internet and technology



Use of the internet and digital devices such as smartphones and wearables is **lower** among people aged 70+ and those with lower household income (50K and under). This is reflected in lower confidence using digital devices among these groups.

Digital confidence among those who use the internet



Base: All those who use the internet (n=1,252)
Source: Q6. How confident, or not, are you in your ability to use digital technology such as a smartphone or tablet?

* While this question was only asked of those who completed the survey over the phone, this figure also includes all online respondents.
Base: All respondents (n=1,302) | Source: Q5. Do you ever use the internet? This could be at home or work, via a smartphone, or in a community venue such as a marae, library or internet café. | Q7. Do you have a smartphone? | Q8. Do you ever download apps onto your mobile phone? | Q10a. Do you ever use wearable technology, like fitness devices or smart watches?



For more information please contact:

Edward Langley

Colmar Brunton

Edward.Langley@colmarbrunton.co.nz

Phone (04) 913 3051

www.colmarbrunton.co.nz

IMPORTANT INFORMATION

Research Association NZ Code of Practice

Colmar Brunton practitioners are members of the Research Association NZ and are obliged to comply with the Research Association NZ Code of Practice. A copy of the Code is available from the Executive Secretary or the Complaints Officer of the Society.

Confidentiality

Reports and other records relevant to a Market Research project and provided by the Researcher shall normally be for use solely by the Client and the Client's consultants or advisers.

Research Information

Article 25 of the Research Association NZ Code states:

- a. The research technique and methods used in a Marketing Research project do not become the property of the Client, who has no exclusive right to their use.
- b. Marketing research proposals, discussion papers and quotations, unless these have been paid for by the client, remain the property of the Researcher.
- c. They must not be disclosed by the Client to any third party, other than to a consultant working for a Client on that project. In particular, they must not be used by the Client to influence proposals or cost quotations from other researchers.

Publication of a Research Project

Article 31 of the Research Association NZ Code states:

Where a client publishes any of the findings of a research project the client has a responsibility to ensure these are not misleading. The Researcher must be consulted and agree in advance to the form and content for publication. Where this does not happen the Researcher is entitled to:

- a. Refuse permission for their name to be quoted in connection with the published findings
- b. Publish the appropriate details of the project
- c. Correct any misleading aspects of the published presentation of the findings

Electronic Copies

Electronic copies of reports, presentations, proposals and other documents must not be altered or amended if that document is still identified as a Colmar Brunton document. The authorised original of all electronic copies and hard copies derived from these are to be retained by Colmar Brunton.

Colmar Brunton™ New Zealand is certified to International Standard ISO 20252 (2012). This project will be/has been completed in compliance with this International Standard.

This presentation is subject to the detailed terms and conditions of Colmar Brunton, a copy of which is available on request or [online here](#).

