

STRATEGIC MEMORANDUM

TO: Ben Carter, National Director, Media & Public Affairs, Master Builders Australia
FROM: Andrew Laidlaw
SUBJECT: Master Builders Topline Summary
DATE: 17th August 2021

SUMMARY METHODOLOGY & RECRUITMENT SPECS

Two (2) focus groups recruited from NSW, QLD, Vic, SA, Tas, and WA on 16th August 2021. The focus group sample was comprising:

- Total sample of n=19 Australian voters, aged under 40 years; mixed gender;
- All workers in the construction industry (20% managers, 70% “tradies”, 10% business owner)
- No respondents are part of a group or organisation actively trying to influence governments.
- Excluded any respondents that had uncommon insight into social and political issues, either personally or via a direct family member (marketing, PR, politics, etc.). In addition, any respondents with extremely views on key political issues were also excluded to ensure the sample of representative of ‘Middle Australia’.

IMPORTANT:

The methodology used in this qualitative research project is primarily designed to be exploratory and diagnostic. This research is not designed to quantitatively define the marketplace or electorate.

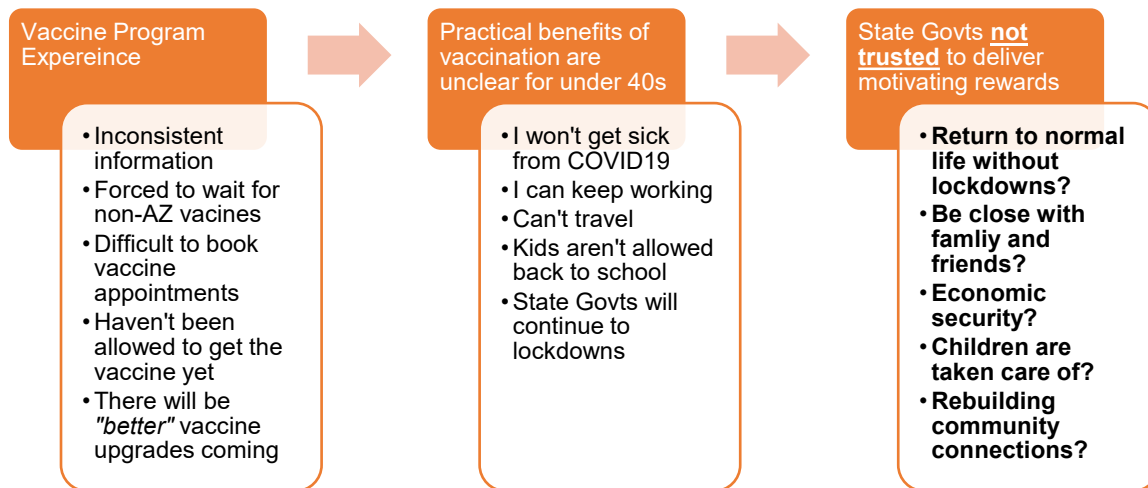
The focus of this qualitative research methodology is to understand how people think about current perceptions, preferences, choice scenarios, the motivations behind those choices, the benefits or liabilities of the protagonists, and tactical considerations. Therefore, qualitative research provides understanding about *‘most of the thinking, of most people, most of the time.’*

These focus groups are designed to assist with long-term strategy, message themes and campaign planning. In addition, they can provide understanding on how short-term tactics will play out in the minds of voters and/or consumers. While this qualitative research will attempt to mirror top of mind concerns of everyday Australians, the central objective is to diagnose the core behavioural and attitudinal drivers of existing and emerging issues. This will sometimes include prompting participants with supportive and opposing arguments that voters have not before considered.

This report will be accompanied by, and is subject to, a verbal debrief. The issues outlined in here have yet to be assessed for timing and prevalence in quantitative tracking.

Strategic Summary

WHY UNDER 40s ARE “NOT RUSHING” TO GET VACCINATED:



These respondents (18-40 yrs) were not anti-vaxxers, but they do not see a vaccine as an immediate personal priority. Despite the fact they know that it is the right thing to do to get the vaccine in the long-term, there is no emotional motivation for them to do it right away:

- They are not “fearful” of the COVID-19 virus due to their age.
- They believe the current vaccines are just 1st generation, and that they will be constantly improved “like iPhones”.
- State and Territory Governments are seen to ignore the social and economic effects of lockdowns.
- Cynicism towards Premiers and Chief Ministers is rising, and they are seen to be driven by the politics of COVID. Not the health, economic or social interests of their voters.
- The National Cabinet agreement to leave lockdowns and border closures behind is seen as a collective promise to the Australian people and SHOULD be kept by all State and Federal Governments.
- **Voters don't believe Premiers and Chief Ministers will deliver on their promise, and that means there is no emotional motivation to make the vaccine an immediate priority as there is no benefit of being “an early adopter of the 1st generation of vaccines”.**

Overall experience with the Government COVID vaccination program is poor; indicating general lack of satisfaction with the program. Understanding of the vaccination program is not a problem; under 40s understand the promised personal benefits of the COVID vaccination. Lack of confidence in State and Territory Governments delivering the long-term rewards (returning to a normal life) appears to be the most significant barrier to immediate participation.

Misconceptions about COVID vaccination appear to hinder initial acceptance and are particularly damaging to the likelihood of immediate participation with some under 40s. This is being directly caused by a distinct lack of consistent messages from State and Federal Governments. The State Premiers are seen to have “taken over” the pandemic response since the end of JobKeeper and the Federal Government is not seen to have “pulled States into line.” **Consequently, despite the Prime Minister promising a return to normal life if the vaccination program is successful, under 40s voters doubt it will be delivered by the States. This removes the emotional motivation to make a vaccination an immediate priority.**

Many respondents indicate a general hesitation to ‘sell’ the COVID vaccination process to their friends or co-workers due to the perception that COVID vaccination is a polarising issue. The best role the Master Builders can play as a non-medical expert is to reassure their industry that their Governments WILL deliver on the long-term rewards of a successful vaccination program – returning to a normal life! Arming the vaccinated with this emotional leverage point, together with appealing information may empower under 40s to be better ‘vaccination advocates’ to their peers.

The vaccination programme has an extrinsic challenge to build an effective brand with under 40 tradies. Proponents of COVID vaccines are too often only relying on rational “facts” and attributes about the vaccines themselves. While this may persuade people that they should get the vaccine, it fails to motivate them to make it an immediate priority.

There are three issues that must be resolved for under 40s to see the vaccine as a personal, immediate priority:

- **First, stop the “blame game” between Governments.** We must fix the perception of a lack of co-ordinated management between Governments of the pandemic to halt the rising cynicism towards official COVID decision-making in general.
- **Second, stop the inconsistent information.** Voters do not rely on one source of information; they listen to multiple sources. Consistency in messaging from multiple sources is how they determine fact from fiction, including from State and Federal Governments. Renaming the AZ vaccine will further reinforce hesitations as it will be seen as yet another attempt to “pull the wool over our eyes”.
- **Finally, State and Territory Governments must reassure voters they will stick to their promise to return freedoms at 70-80% vaccination rates.** The national cabinet agreement that was announced is seen by voters as a promise to the Australian people, but State and Territory Governments are not trusted to deliver on that promise. To ensure there is an emotional motivation for voters to get vaccinated NOW, they must be consistently reassured that State and Territory Governments will deliver on their promise of a return to normal life once vaccines are administered to +70% of Australians.

The strategy of the Master Builders to run adverts targeting under 40s with a message that is focused linking the desired outcomes of getting a vaccine with the long-term emotional

rewards of a successful vaccination program is the most effective and credible role it can play publicly.

For the strategy to be successfully executed, the advertising must work to provide reassurance that State and Territory Governments in particular will follow through on their promises of a return to normality if Australian get vaccinated.

These emotional benefits must be orientated towards the enduring values of **security and peace of mind**, NOT *belonging* to a community. They are not interested in being altruistic, they want their own security and peace of mind for the future that has been eroded in the last 6 months.

It must be noted that inconsistent information from various State and Federal Government sources will continue to cause hesitancy amongst this segment (under 40s) despite efforts to link the benefits of the vaccination to an emotional driver.

Perceptions of the Vaccination Programme

The recovery from the pandemic, believed to have been in good shape just months ago, is now seen to have stalled. The instantaneous collapse of the recovery into lockdowns across the country nearly 18 months after the pandemic began seems baffling to these young tradies. They believe there is limited national co-ordination of the pandemic response, and as a result Governments are not learning from past mistakes.

Australia's economic security is seen to depend on the success of the management of the pandemic, but young tradies are concerned that "no one appears to be in charge." Since the end of JobKeeper in March 2021, decision making on the economy and finances is perceived to be dictated by the whims of State Premiers rather than a clear long-term national economic plan for Australia as a whole.

With the road out of the pandemic looking increasingly unpredictable, young tradies are spontaneously focused on the long-term impact on their respective businesses. Already beset by supply chain issues and "COVID red tape", there is a concern that the Government bureaucrats making decisions that impact their industries don't understand (or don't care for) the impact their policies have on their businesses and jobs. There is frustration that in standing idly by politicians aren't standing up for their interests anymore.

This is directly increasing the cynicism towards Politicians & Governments, which is diminishing motivation to get vaccinated amongst this under 40 years tradie segment.

Perceived Vaccination Program Benefits

Respondents were asked to provide a top-of-mind list of their perceived benefits of the Government COVID vaccination program in their industry. Benefits include:

- Physical prevention of COVID symptoms
- Personal benefit (*getting something for free*)
- Improved morale/piece of mind/perceived commitment to the COVID response
- Convenience (*no need to go to personal GP for vaccination*)
- Getting a vaccine looks good to friends and family
- Maintained productivity/less forced isolation or lockdowns (*overall cost savings for industry*)
- Improved perception of staff attendance (*people don't have an excuse not to turn up for work*)

Apart from the primary benefit of the vaccinations – actually preventing COVID and reducing lockdowns – respondents perceive the provision of COVID vaccinations as the most likely way out of the stalled pandemic response.

“It is a race. It’s a race against the rest of the world to get our economy humming again without the need for massive Government money printing programs.”

Improved community morale was voted by focus group participants as perhaps the most important benefit of the COVID vaccination program.

“The boss likes the idea of the employees seeing us as a caring, sharing employer by getting vaccinated.”

“I think our employees like to feel that the Government’s looking after them. It makes them feel good.”

A likely contributor to improved workplace morale is the availability of the vaccination within the workplace or at a pharmacy rather than requiring a dedicated visit to a personal general practitioner.

While somewhat hesitant to mention it, respondents also perceive the getting a vaccination as a means to ‘make themselves look good’ to people they know and on social media.

“It’s a thing now to post online that you have got a job. People congratulate each other for getting the job too. It’s all a bit of digital pat on the back.”

Perceived Vaccination Program Challenges

Conversely, respondents are also asked to provide a top-of-mind summary of the challenges faced in implementation. Challenges include:

- Lack of acceptance/take-up in the community
- Fear of needles/fear of vaccination side effect
- Resentment toward vaccination avoiders
- Lack of effective promotion (both external and internal)
- People getting sick as a result of vaccine (AZ only)
- Too little information / inconsistent information
- Vaccination perceived as unnecessary for people under 40 years
- Doesn’t make a difference on returning freedoms lost under the pandemic

It is apparent that some respondents are distrustful of the Government COVID vaccination process, and it directly impacts participation. A significant number of respondents indicate that a minority believe that that vaccination is more likely to cause side effects than protect against COVID. In fact, this is a view that is still somewhat supported by some Government websites recommending under 40s to get Pfizer vaccine over the AZ variety.

“I know a few people who were very, very sick... my cousin’s husband was hospitalised in the UK with blood clots from AZ.”

In addition to this misinformation, the fear of side effects of the AZ vaccine inevitably reduces the number of participants even further.

“I’m a mum and not in danger of getting sick from covid, I can’t afford to risk getting bloody clots. Even if the chance is low.”

Resentment toward those people in the community who refuse to be vaccinated is a problem, particularly within smaller businesses that are subject to lockdowns. There is a perception that individuals who are not vaccinated are likely ‘catch COVID’ and hence put the other vaccinated people and the vulnerable at risk.

Respondents indicate that both community and industry promotion is lacking. There is a feeling that they do not receive enough information about COVID vaccination from the Government, nor do employees receive enough credible and consistent information (via the media) about the COVID vaccination program more broadly.

'Inconsistent information' is mentioned frequently by respondents and is likely to be a significant contributor to the misinformation that is prevalent in many communities and workplaces about COVID vaccines and the vaccination program.

"I just put the information together myself – everything you hear is different. It's sort of the blind leading the blind, really."

Finally, many respondents indicate that they simply view the vaccination as 'unnecessary for people their age' and, as a result, don't feel the need to participate in the program.

"Governments haven't been rushing to get us vaccines until quite recently, so they obviously don't think we are a vulnerable to COVID. So, unless vaccination protects me from Government lockdowns and travel restrictions then what's the point?"

Personal Experience of the Vaccine Program

This most damaging erosion of faith in the response to the pandemic from State Government is the inconsistent information they receive. Every day, young voters hear sound bites from Federal Government or State Government press conference introducing new rules, new goals, new expectations, and new health statistics daily. In addition, much of this information is consumed from secondary sources after being passed through the prism of opinion, commentary, partisan rhetoric, or satire. They don't know what information is true or how to make the best decision for themselves and their families. Consequently, the reaction to this confusion is to "wait and see." In addition, it is directly driving up cynicism towards Government, which is causing more serious perceptual blockages.

"Every time I turn on the news, I hear something different from a government politician or a health expert. It's impossible to work through."

"There are new rules and new stats all the time and I really try hard, but I can't follow it all."

"Governments have lost the plot; you never know what they are going to do next."

"They promise something one day and literally the next day they say something different."

“Andrews was going on about zero cases and the very next day shut the shutdown. They don’t give a stuff about breaking promises.”

The lack of choice on vaccines for under 40s is also a key driver for hesitancy. They don’t believe it is “fair” for the Government to only offer the AZ vaccine to under 40s and openly state that if other vaccines were available to them, they would go out and get the vaccine immediately.

Importantly, they don’t believe that Government, industries nor workplaces can make vaccines mandatory until there is a **genuine vaccine choice** available to every Australian, not just a vaccine available to every Australian.

“Why should I get the AZ vaccine if I don’t want to? I want a different vaccine and they can’t make them mandatory if they only offer one type of vaccine.”

“If I could go out and get Pfizer today I would.”

“I am a mother, and I don’t want to play Russian roulette with blood clots to protect me against a disease that I’m unlikely to get anyway.”

Finally, there is genuine frustration amongst under 40s that they have been barred until very recently from even booking to get a vaccine. In addition, for those that have tried to book in the central portals they have been delayed by weeks for get appointments for a job.

“I want to get a job and the Government program has done everything they can to stop me from getting one.”

“I’ve booked but could get in for three weeks. Don’t give me a hard time for not getting a vaccine when it’s impossible to get one!”

Practical benefits of vaccinations are unclear for under 40s

Respondents were aware of the personal practical health, economic and social benefits associated with getting vaccinated, but these benefits are not considered important because they don’t think Governments will deliver them.

“I heard Gladys say that there will still be restrictions even when we get vaccinated. So, what’s the point?”

“Does anyone on this call really believe Dan Andrews will just lift all restrictions if we get the vaccine tomorrow? No way.”

“They (Governments) tell us that they will give back freedoms if we all get vaccinated, but they’ve never valued freedom for the community or business since the start of the pandemic so why would they start now?”

“If I’m not going to get sick anyway and I can’t travel, see my family or get out of lockdown. What’s the point risking blood clots?”

They know that the vaccine is the right thing to do in the long-term, but the lack of immediate benefits to them of getting jabbed means they don’t have an immediate desire to getting vaccinated:

- Despite believing in vaccines generally, they don’t believe their age group is danger of serious illness from COVID19
- Tradies don’t believe that their industry will ever be shut down for long periods because its considered “too important to the economy”
- They have heard through the media that vaccination rates may not protect from future lockdowns
- They will not be able to travel interstate or overseas anytime soon if they get vaccinated now
- Getting vaccinated doesn’t guarantee kids going back to school
- They don’t believe lockdowns will lift because they get vaccinated

It is not enough either for just the Prime Minister and the Federal Government to promise that restrictions will be lifted with people get their vaccinations, it must be State Premier too because they are the ones *“calling the shots”* at this point in regards to restrictions and lockdowns.

State Governments are not trusted to deliver long-term motivating rewards

The vaccination program faces a fundamental product extrinsic crisis, which means Australians under 40 years simply have not emotional motivation to get a vaccination right now. Rising mistrust and cynicism of Government is blocking the personal relevance bridge, making the known benefits of the vaccine unimportant for these voters.

“I’ll wait and see if Government actually follow through with their end of the deal.”

“What’s the point of risking blood clots when the Government will keep us under lockdown anyway?”

“We’ve had to home school our kids for months here in Victoria. There’s no proof they will stop doing that if I get a vaccination.”

The emotional leverage point of ‘returning to normal life’ is predictably highly desired by under 40 voters. However, with trust in Governments to deliver on their long-term emotional reward falling it is not linked to the attributes and outcomes of the vaccine – thus a COVID vaccine is unimportant and not an immediate priority.

Information Preferences

More information is necessary on a number of fronts:

- Promotional information to the building industry
- Promotional information for managers to use internally and on worksites
- General information about COVID and the vaccines (to increase awareness and reduce misconceptions)
- Reassurance that Governments will deliver long-term rewards (return to normal life)

Respondents express a need to be made aware of the benefits of COVID vaccination. Several indicated that they just don’t feel threatened by COVID symptoms. In most cases, they did not receive, or do not recall receiving information from the Government on COVID vaccinations.

“Once we decided to do it, it took some time to find an appointment.”

“I think leaflets are great as well, but I think they need additional information as a backup. They need to know where to go and find the information that is reliable and social media is not reliable.”

“I had a couple of brochures that people could come and look at, but I wasn’t actively trying to sell it to anyone.”

Various promotional media were discussed, and the consensus of the group indicated that an initial letter and/or promotional pack followed up by a telephone conversation with a provider representative would be the most effective means of influencing tradies to participate.

“They need to hear it from somebody that knows what they are talking about. Someone that it accountable to the advice they are giving.”

Scare tactics are seen to be counter-productive for people under 40 as they are convinced the data proves they are not directly at risk from severe disease – or at least unlikely develop complications at their age.

“Show be why I should do it. Don’t try and scare me into it. The media have tried that already and it hasn’t worked.”