Rutherford Labs Presents:

COVID-19: Analysing conversations about confidence, community, and care

24 August, 2020

Rutherford Labs is exploring the heightened mood of the nation during lockdown to understand New Zealanders' core concerns and identify the roles Kiwi organisations might play to meet consumers' needs.

Analysis of social media conversation about COVID-19 in New Zealand, August 11 – 24, 2020

How might businesses, government entities and the media contribute to the successful management of COVID-19 in New Zealand?

On August 11, 2020, Auckland's sudden return to Alert Level 3 generated the highest volume of conversation about COVID-19 on social media channels since the start of the pandemic.

Following the shock of the announcement, the past two weeks have seen heightened emotions (7% increase in sadness, and an 8% drop in optimism) and fierce debate about the government's response, rumours about community transmission, Alert Level System timeframes, conspiracy theories, and political trash talk surrounding the upcoming election.

New Zealanders are signaling anxiety, pessimism and anger, and are expressing their frustrations and needs.

Rutherford Labs have mapped this conversation to a framework that outlines the roles businesses and government might play to create trust and support amongst their customers through and beyond this lockdown.

As the nation weaves through the road to recovery, the opportunity for the business sector is to empathise with consumers' needs, behave compassionately, act transparently, and build trust.

What you'll find in this report:

This research analyses live, public conversation from social media channels related to lockdown from the past two weeks (435,318 conversations on Facebook, Twitter, Reddit, blogs, news sites and forums) to provide us with real-time, unclaimed insight.

This analysis equips us with signals of consumers' real needs and can guide businesses when it comes to rebuilding confidence, investing in community and understanding where consumers need care.
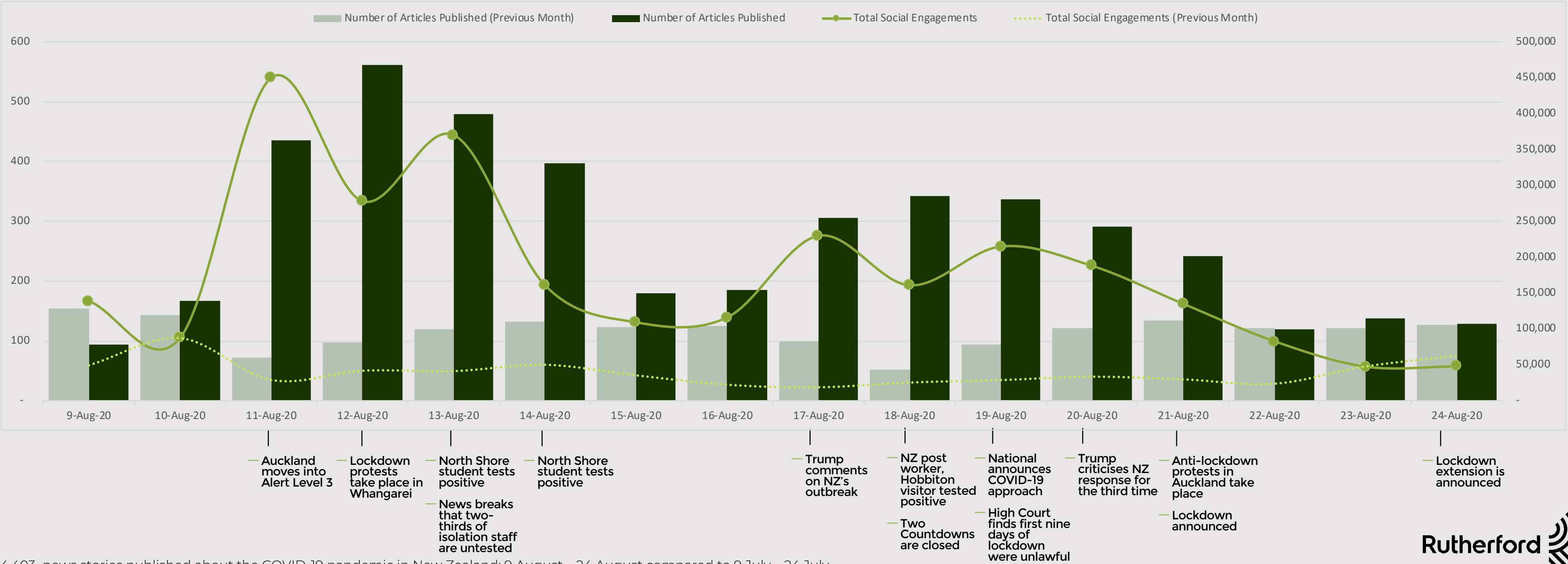
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What's changed in the last two weeks?

COVID-19 has consumed the news cycle following Auckland's move to Alert Level 3 on August 11 and lockdown extensions.

140% ↑

increase in volume of articles published about the pandemic in the past fourteen days compared to the same period in July.

Number of Articles Published (Previous Month) Number of Articles Published Total Social Engagements Total Social Engagements (Previous Month)

VOLUME OF NEWS STORIES PUBLISHED & SOCIAL ENGAGEMENTS

KEY STORIES

— Auckland moves into Alert Level 3

— Lockdown protests take place in Whangarei

— North Shore student tests positive

— News breaks that two-thirds of isolation staff are untested

— North Shore student tests positive

— Trump comments on NZ's outbreak

— NZ post worker, Hobbiton visitor tested positive

— Two Countdowns are closed

— National announces COVID-19 approach

— High Court finds first nine days of lockdown were unlawful

— Trump criticises NZ response for the third time

— Anti-lockdown protests in Auckland take place

— Lockdown announced
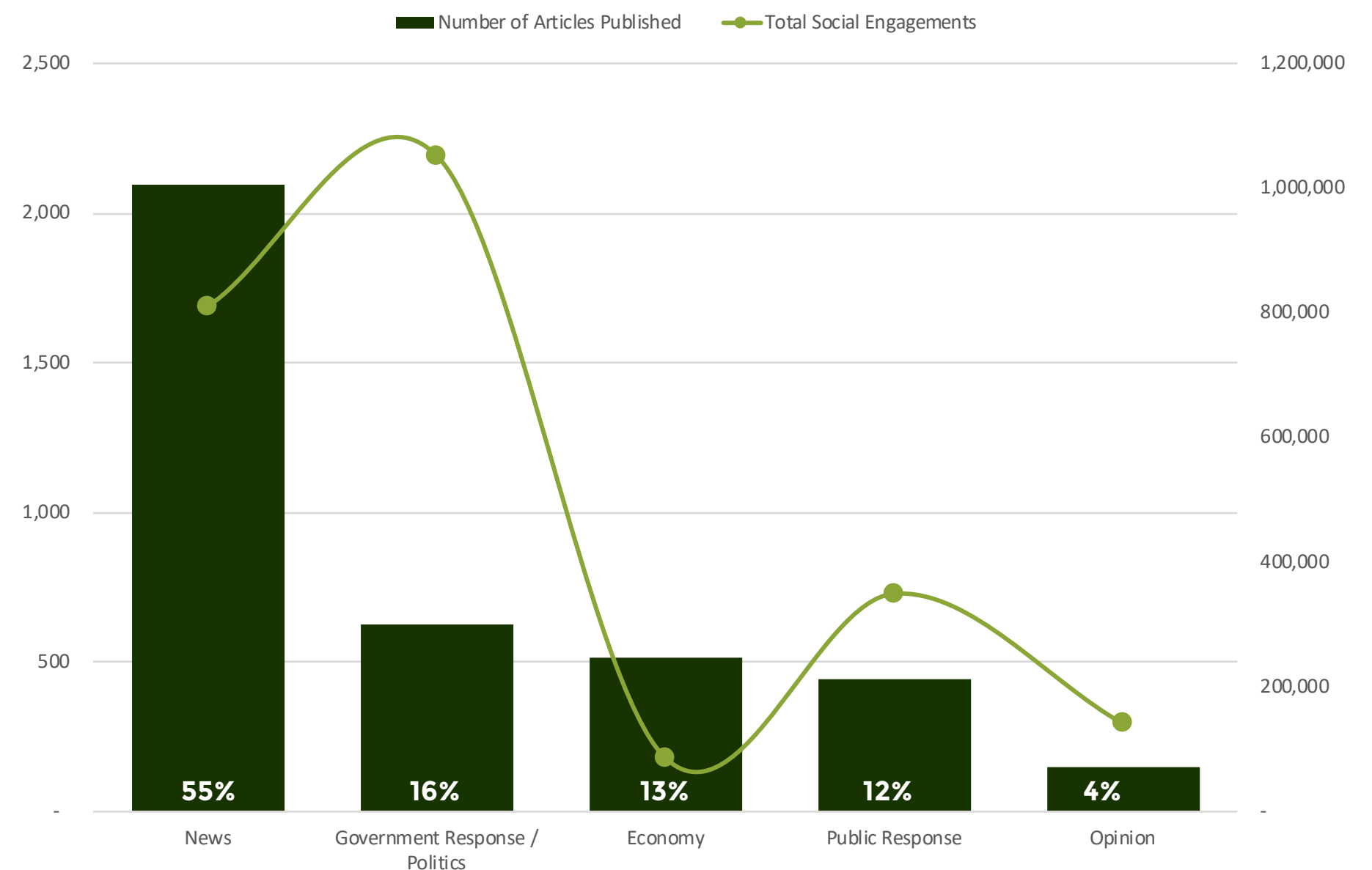
— Lockdown extension is announced

*4,403 news stories published about the COVID-19 pandemic in New Zealand: 9 August – 24 August compared to 9 July – 24 July.

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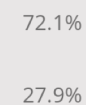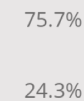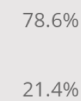*What's driving conversation online?*

58% of online conversation consists of heated debate taking place between users in response to news stories. Press coverage of the government's response to the pandemic and politics provoke the most conversation.

News coverage of COVID-19 in NZ, August 11 - August 24, 2020.

Of the **4,403** articles published about COVID-19, New Zealanders were most engaged with political news and the government's response to the pandemic.

Number of Articles Published   Total Social Engagements

News	Government Response / Politics	Economy	Public Response	Opinion
55%	16%	13%	12%	4%

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In the past two weeks, conversation has focused on the government's response, anxiety about the virus, and lockdown. Users are more critical of the government and are engaging in more political debate.
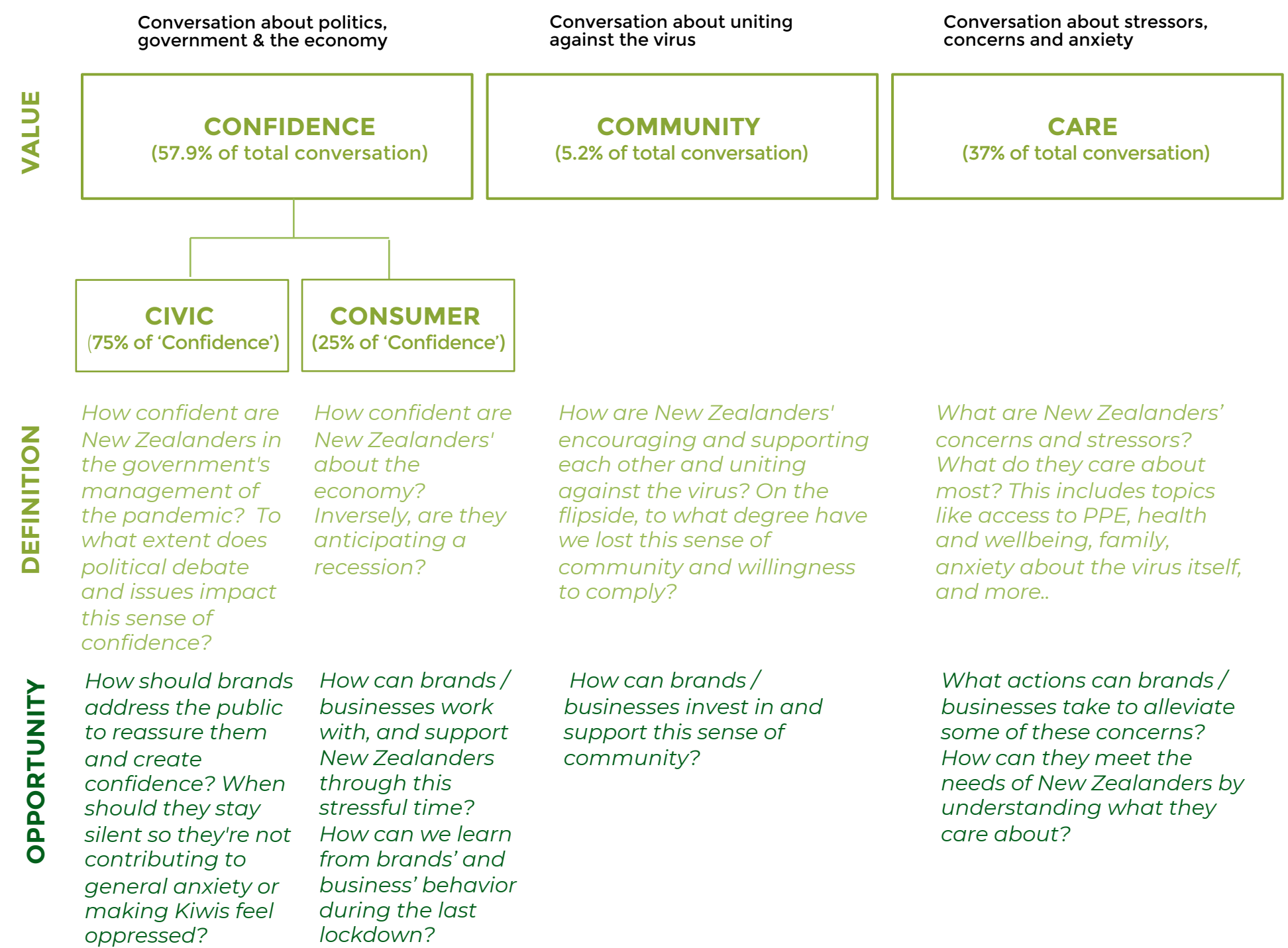
DISCUSSION ABOUT POLITICS AND THE GOVERNMENT RESPONSE
110,858
44% share of total conversation
22% ↑ movement since last lockdown

STRESSORS: ANXIETY ABOUT THE VIRUS, CONSPIRACIES AND A NEW NORMAL
94,524
37% share of total conversation
7% ↓ movement since last lockdown

DISCUSSION & ANXIETY ABOUT ECONOMY AND JOBS
36,228
13% share of total conversation
44% ↓ movement since last lockdown

UNITING AGAINST THE VIRUS, COMPLIANCE AND PROTESTS
12,995
5% share of total conversation
57% ↓ movement since last lockdown

Negative 72.1%
Positive 27.9%

Negative 78.6%
Positive 21.4%

Negative 75.7%
Positive 24.3%

Negative 55.4%
Positive 44.6%

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*482, 493 posts about COVID-19 and lockdown on Facebook, Twitter, blogs, forums and reddit, 11 August, 2020 – 24 August, 2020. Note, irrelevant content has been excluded from the category breakdown.

What does this mean for the business sector?

Heightened emotions and negativity in conversation signal New Zealanders' anxiety and need for reassurance in tense, uncertain times. How might businesses and government entities demonstrate responsibility and build trust during lockdown?

*482, 493 posts about COVID-19 and lockdown on Facebook, Twitter, blogs, forums and reddit, 11 August, 2020 – 24 August, 2020.

Conversation can inform the business sector's behaviour and their approach to supporting New Zealanders during lockdown.

	Conversation about politics, government & the economy		Conversation about uniting against the virus	Conversation about stressors, concerns and anxiety
VALUE	**CONFIDENCE** (57.9% of total conversation)		**COMMUNITY** (5.2% of total conversation)	**CARE** (37% of total conversation)
	CIVIC ('75% of 'Confidence')	**CONSUMER** (25% of 'Confidence')		
DEFINITION	*How confident are New Zealanders in the government's management of the pandemic? To what extent does political debate and issues impact this sense of confidence?*	*How confident are New Zealanders' about the economy? Inversely, are they anticipating a recession?*	*How are New Zealanders' encouraging and supporting each other and uniting against the virus? On the flipside, to what degree have we lost this sense of community and willingness to comply?*	*What are New Zealanders' concerns and stressors? What do they care about most? This includes topics like access to PPE, health and wellbeing, family, anxiety about the virus itself, and more..*
OPPORTUNITY	*How should brands address the public to reassure them and create confidence? When should they stay silent so they're not contributing to general anxiety or making Kiwis feel oppressed?*	*How can brands / businesses work with, and support New Zealanders through this stressful time? How can we learn from brands' and business' behavior during the last lockdown?*	*How can brands / businesses invest in and support this sense of community?*	*What actions can brands / businesses take to alleviate some of these concerns? How can they meet the needs of New Zealanders by understanding what they care about?*

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Civic Confidence

44.2% of total conversation

Sentiment in conversation over time

Legend: Negative — Neutral — Positive — Linear (Positive)

Share of sentiment: 45% negative (+9% increase compared to last lockdown), 37% neutral, 18% positive

New Zealanders are engaging in debate about the government's response and their political allegiances. This conversation has been intensified by the upcoming election.

1. **Support for Labour and the Prime Minister's leadership**
   This conversation expresses unwavering support for Labour's response, closely tied to admiration for the Prime Minister and Dr. Ashley Bloomfield. These users believe that Labour has taken a compassionate, humane response to the pandemic.

> **Fred Salamo**
> Wow thanks 🙏 Morning JAcinda ARdern be strong 💪 be calm be cool be kind and keep it moving we love you Rewahard 🙌😊🙏👌🌹
> 🌹🌱🌱🌱🌱🌱
> Like · Reply · 1 w

2. **Divisive Labour vs National debate**
   Debate between Labour and National supporters is rife on both left and right-leaning news sites and social pages for both parties. Users angrily lobby for parties they support and are quick to attack the other. The intensity of this debate is contributing to negativity in the conversation.

> because it wont work and I see another dyed in the wool National supporter who puts money before lives
> Like · Reply · 3 d

> my comments had nothing to do with money and a bit
> of a cheek you talking about "appalling and misleading". You lefties find it offensive anybody having an opinion different to yours, then you always turn your criticism into something nasty and personal..
> Like · Reply · 3 d   ❤ 1

1. **Distrust of the government**
   A proportion of the conversation is angry and believes that the government has failed in its response, accuses the nation's leadership of lying, 'fabricating' the pandemic and, has lost faith in both Labour and National.

> **necroking48**
> @necroking48
> Mask wearers and the lying, corrupt Govt`s pushing this garbage are acting like Covid is somehow outside everywhere in the air molecules that we breathe.

Role for the business sector and the media:
Both businesses and the media may need to remain neutral during a period of high stress and avoid inflaming the debate. Emotions have intensified and users are likely to react in heated ways. Brands and businesses could face backlash if they enter the debate. *Rutherford Labs will measure and continue to monitor changes in this conversation.*

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Consumer Confidence

Consumer Confidence

13.7% **of conversation**
Sentiment in conversation over time
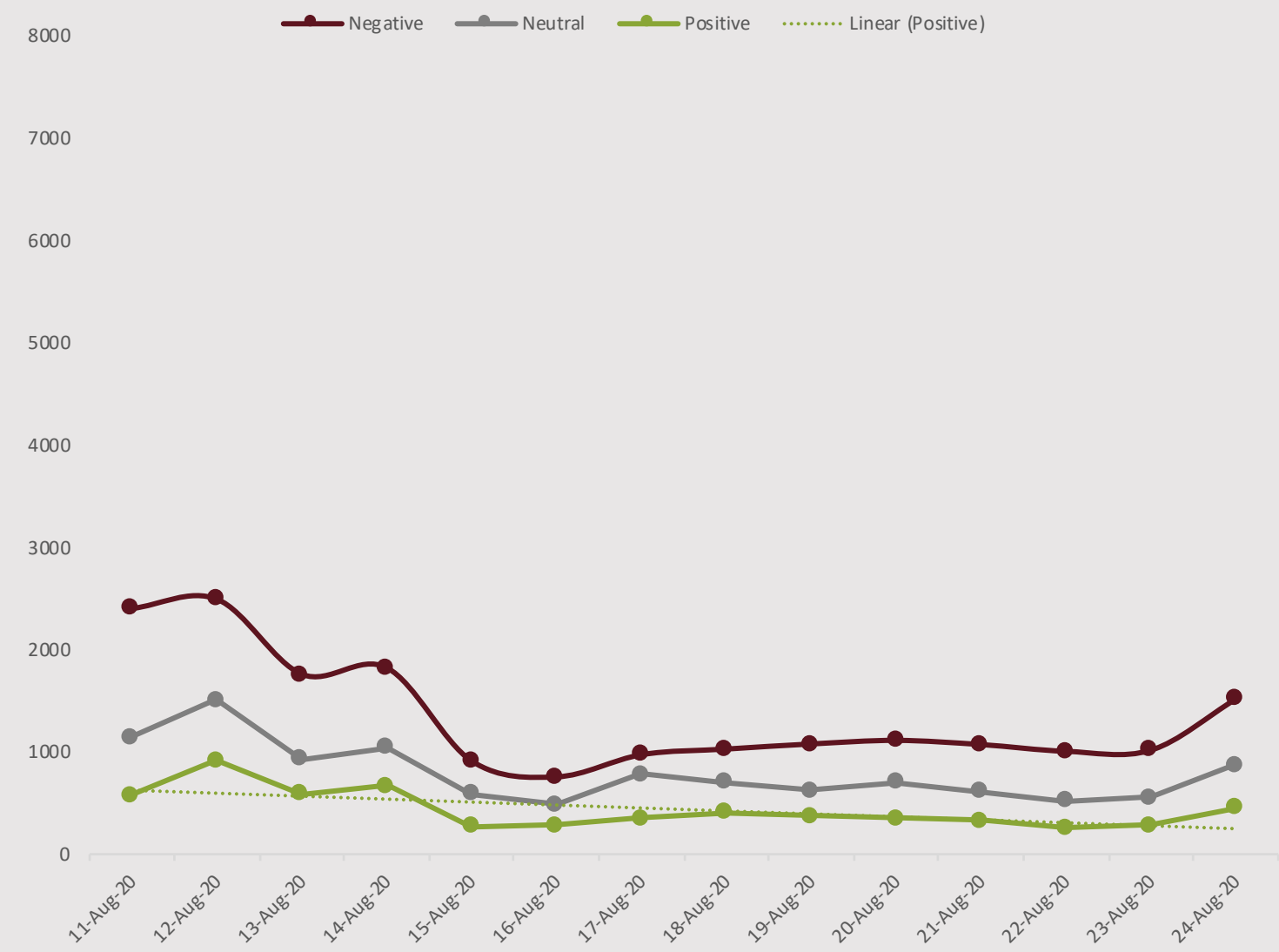
Legend: Negative — Neutral — Positive ·········· Linear (Positive)

Y-axis: 0, 1000, 2000, 3000, 4000, 5000, 6000, 7000, 8000
X-axis: 11-Aug-20, 12-Aug-20, 13-Aug-20, 14-Aug-20, 15-Aug-20, 16-Aug-20, 17-Aug-20, 18-Aug-20, 19-Aug-20, 20-Aug-20, 21-Aug-20, 22-Aug-20, 23-Aug-20, 24-Aug-20

Share of sentiment: 52% negative (+6% increase compared to last lockdown), 31% neutral, 17% positive

The majority of the conversation is pessimistic about the nation's economic future, but some are in favour of protecting the health and wellbeing of the nation over the economy.

1. **Pessimism about a 'ruined' economy and a government which has 'failed'**
   A high proportion of the conversation is upset and angry about the nation's economic future. Yesterday's announcement about Auckland's lockdown extension has exacerbated this conversation.

   > It's a lie anyway cause nobody I know has it and they have ruined the economy cause they are all mad socialists

2. **Comparing different international approaches to the pandemic**
   Some users are debating different countries' responses to the pandemic. Some of the conversation favours the 'herd immunity' approach and believes it has the best outcome for the economy.

   > It's reasonably evident that Sweden got it right. Over 5,000 people died. That's not good. But it's a little more than a bad flu seasons. There are very few new cases in the community, there are very few deaths from COVID now. And their lives have gone on, basically as normal. Over the coming weeks/ months, their death rate per month is likely to be lower than normal, as those who were seriously ill or highly compromised died a little early.
   >
   > Like · Reply · 1 w   28

3. **Belief that the government has been responsible and humane in prioritising lives over the economy**
   A smaller proportion of the conversation is in support of the government's decisions to prioritise the health and wellbeing of the nation. This segment of conversation suggests that the current leadership is investing in a long-term economic future.

   > Not to beat a dead horse but I'm getting real sick of "we can't do lockdown bc tEh EcOnOmY!!
   >
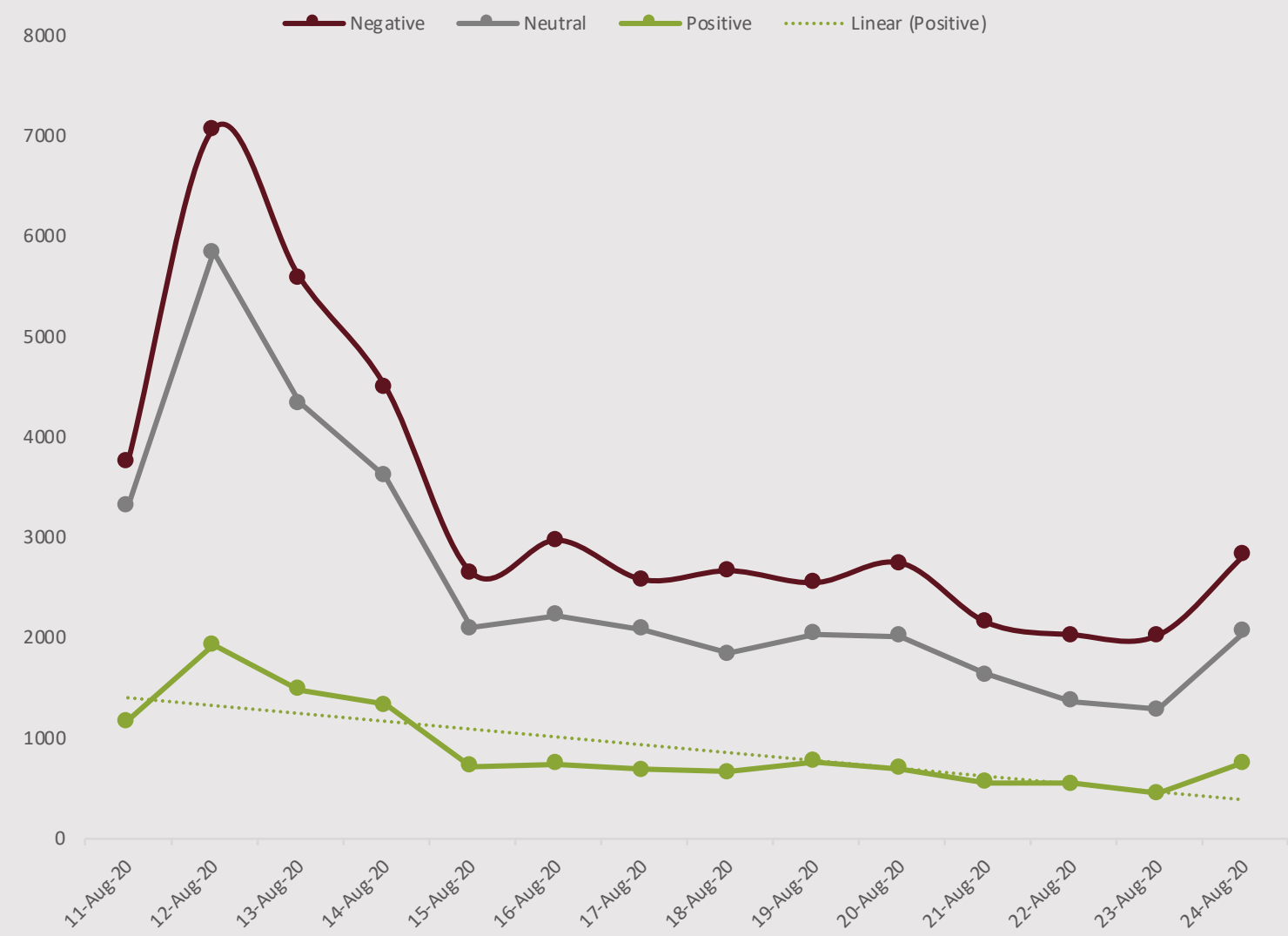   > & 2) if too many people die/are hospitalised the economy tanks anyway.

Role for the business sector and the media:
Acknowledge the pressure consumers face and be seen to be compassionate and supportive where possible. By communicating an awareness that an economic future is a shared partnership between consumers and the business sector, brands have an opportunity to build trust and confidence. Smaller businesses and online retailers need to avoid being opportunistic. By demonstrating confidence, the business sector may be able to restore a degree of morale. *Rutherford Labs will explore consumers' responses to brands and their behavior. The team is currently running a study on the banking sector.*

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Care

37.1% of conversation
Sentiment in conversation over time

Legend: Negative · Neutral · Positive · Linear (Positive)

Y-axis: 0, 1000, 2000, 3000, 4000, 5000, 6000, 7000, 8000

X-axis: 11-Aug-20, 12-Aug-20, 13-Aug-20, 14-Aug-20, 15-Aug-20, 16-Aug-20, 17-Aug-20, 18-Aug-20, 19-Aug-20, 20-Aug-20, 21-Aug-20, 22-Aug-20, 23-Aug-20, 24-Aug-20

Share of sentiment: 52% negative (+6% increase compared to last lockdown), 31% neutral, 17% positive

New Zealanders are expressing a range of concerns; from access to PPE, community transmission, suicide rates and personal concerns about loved ones.

1. **Anxiety about the virus and its spread**
   New Zealanders are signaling fear about the virus itself and are anxious about contracting the virus – particularly as its long-term impact on health is unknown.

2. **Sad and stressed about the disruption to day-to-day life**
   Some users are stressed and under pressure from the disruption the Alert Level System is having on their everyday lives. This ranges from 'shopping normal', social distancing and the new mandate to wear masks.

3. **Concern about a 'lost middle class'**
   A small proportion of the conversation is sad. These users talk about belonging to a 'lost middle class' which sits between beneficiaries and an upper middle class and isn't adequately supported by the Alert Level System.

4. **Mental health issues**
   A segment of the conversation is suffering from mental health issues due to lockdown, and some are increasingly concerned about suicide rates – and misinformation about the actual figures.

5. **Impact on future generations**
   Another proportion of the conversation is worried about the impact the pandemic will have on future generations.

Role for the business sector and the media:
Demonstrate care and compassion for New Zealanders and meet their needs on these specific concerns where possible, particularly if they align with your brand. Through corporate social responsibility measures, businesses have an opportunity to support some of these needs. *Rutherford will continue to conduct an in-depth analysis of this category and identify other concerns (e.g. sustainability, water levels) to guide business decisions on the concerns which align with each brand and vertical.*

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Community

5% of conversation

Sentiment in conversation over time

8000 · 7000 · 6000 · 5000 · 4000 · 3000 · 2000 · 1000 · 0

Legend: — Negative — Neutral — Positive .... Linear (Positive)

X-axis: 2020-08-11, 2020-08-12, 2020-08-13, 2020-08-14, 2020-08-15, 2020-08-16, 2020-08-17, 2020-08-18, 2020-08-19, 2020-08-20, 2020-08-21, 2020-08-22, 2020-08-23, 2020-08-24
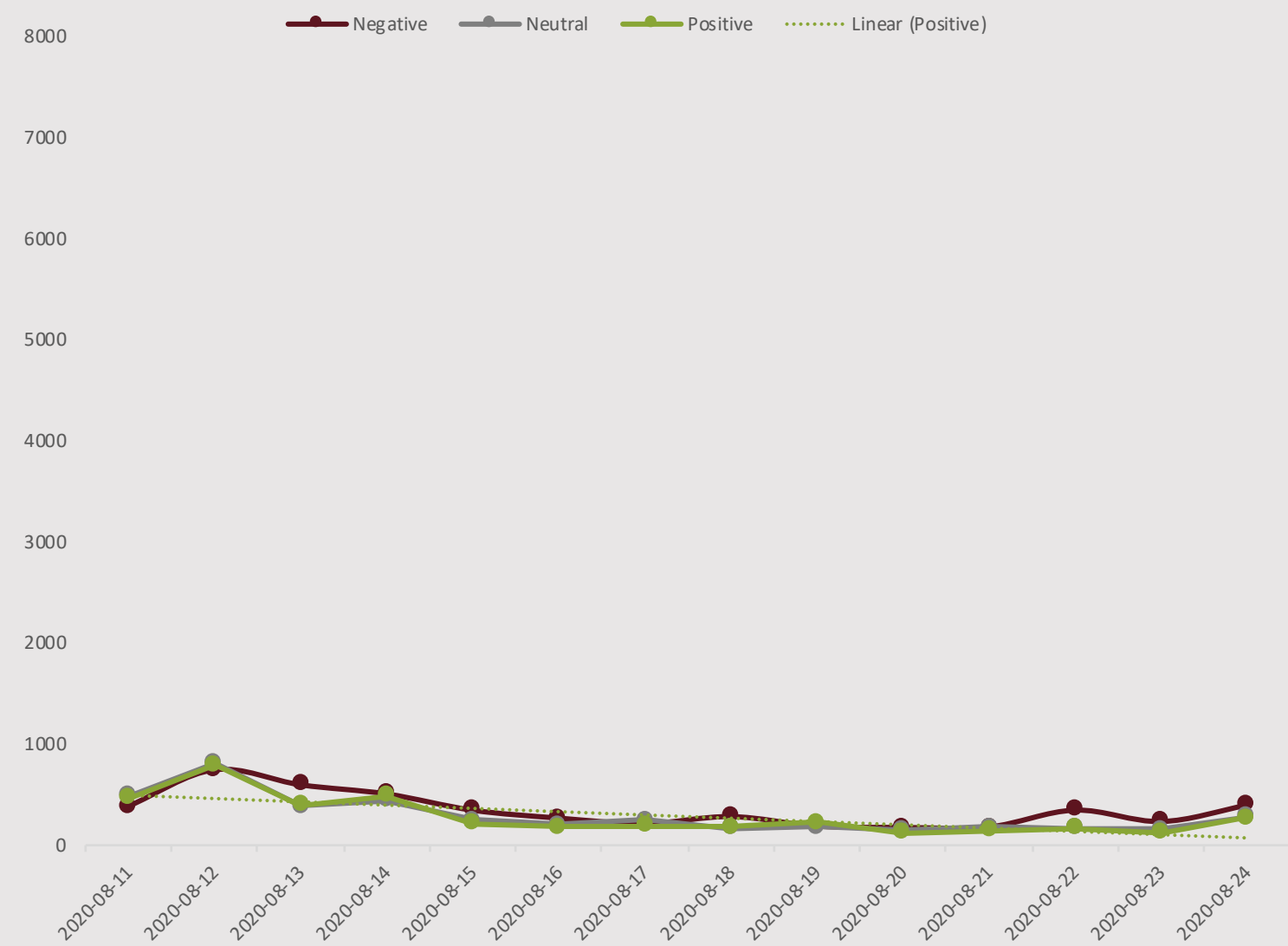
Share of sentiment: 52% negative (+12% increase compared to last lockdown), 31% neutral, 17% positive

Advocacy for #stayhomesavelives and compliance overall has halved compared to the first lockdown. The loss of this sense of community is significant.

1. **Anti-lockdown protesters are the most visible and demonstrate the extent to which political divisiveness is impacting a sense of community.**
   Lockdown protesters and conspiracy theorists are actively refusing to comply with the Alert Level System. This segment of conversation is growing.
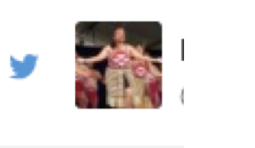
   @JordanSchachtel These people are not in quarantine facilities they are in hotels in towns and cities in New Zealand if the virus is so deadly than the quarantine facility should be in the middle of nowhere the Prime Minister speaks through hole in her arse #FakePandemic #Scamdemic

2. **'Over it'**
   Some users are expressing a sense of malaise and are experiencing fatigue around lockdown. They're observing a lack of compliance and a 'lax' attitude towards social distancing.

   Just been for my daily lockdown walk in Auckland and it seems that the public is responding very differently this time around. Nobody is really interested in any social distancing. Last time around people would go out of their way to cross the street, yet …

   Nobody is really interested in any social distancing.

3. **Team of 5Million advocates**
   A reasonable proportion of the conversation is still optimistic and supports the government's leadership. These users encourage others to comply with Alert Level System rules.

   2:05
   Good improvement in new cases. We are on track to get over this new wave. Hopefully lockdown ends on Monday. Well done Team NZ
   Like · Reply · 5 d   48

   #Kiwi #StaySafe #BeKind

Role for the business sector and the media:
Businesses and the media have a responsibility to reinvigorate a sense of community and encourage the nation to unite, particularly at a moment when the government and political parties are unable to do so. *Rutherford Labs will explore past examples of brands behaving and communicating in a way that instills hope and 'unites' a nation.*

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Ngā
Mihi
Thanks

Rutherford Labs uses social media analysis as a real-time barometer of unsolicited public opinion to complement traditional research methods

Social media research provides Rutherford Labs with human insight to understand and empathise with consumers.

We use machine learning and text analytics tools to gather and process a representative dataset for a brand, topic or business question.

As with all research techniques, social media analysis has benefits and limitations. It is valuable because it allows us to glimpse patterns in public conversation without introducing observer biases. It has limitations because natural language processing algorithms always have some element categorisation error and the tool only analyses data we tell it to analyse. Due to these limitations, we continuously update our models to scan the widest and most relevant public data sources to our research questions including Facebook, Twitter, Reddit, Forums, Media sources, and Blogs.

This methodology works best when considered as an indicator of unsolicited public opinion and is cross-validated by more robust techniques such as behavioural observation or surveys.

Discover: What matters to people?

Contextualising conversation:
Press coverage

Qualitative insight:
What are New Zealanders saying and feeling on public social channels?
- Volume of conversation
- Content of conversation
- Sentiment
- Time of day
- Day of week
- Seasonality / changes over time

Quantitative insight:
Where are they and what do we know about them?
- Demography
- Location
- Social engagements
- Channels of conversation

Diagnose: Why and how does it matter?

Measure and categorise:
- Explore and quantify topics of conversation over time
- Explore sentiment and emotion in conversation through automated, contextual, text analytics

Pattern-seeking:
- Identify attitudes and drivers of conversation
- Segment large datasets of conversation through machine learning

Human interpretation:
- Interpret and synthesise the data with empathy
- Define hypotheses to test
- Identify actionable insights

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