

Psychographic Segmentation of Canadians Regarding COVID-19

Executive Summary



Prepared for Privy Council Office

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Final Report

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March 2021

The Privy Council Office (PCO) commissioned Kantar to conduct a public opinion research survey to understand the foundations of the public's perceptions, behaviours and concerns regarding COVID-19 and develop a segmentation that can be used to inform communication strategies and campaigns for the COVID Alert app and address vaccine hesitancy. This publication reports on the findings of this research.

Cette publication est aussi disponible en français sous le titre: Segmentation psychographique des Canadiens et des Canadiennes en ce qui a trait à la COVID-19

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1. Executive Summary

1.1 Research Purpose and Objectives

In response to the ongoing COVID-19 pandemic, the Privy Council Office (PCO) wanted to develop a psychographic segmentation of Canadians that would fill key knowledge gaps surrounding values-based attitudinal profiles. More specifically, a segmentation would aid PCO in developing an understanding of the relationship between Canadians' social values and attitudes and Canadians' perceptions, behaviours, and concerns regarding public health measures, particularly as it concerns the COVID Alert app and vaccination hesitancy.

To this end, the results of this research will be used to complement existing demographic segmentations of the population to fill key knowledge gaps surrounding values-based attitudinal profiles.

The overall objective of the research is to understand the foundation of the public's perceptions, behaviours and concerns regarding COVID-19. Specific objectives include:

- Segment Canadians in order to inform communication strategies and advertising campaigns for the COVID Alert app and address vaccine hesitancy; and
- Provide input that will help reshape and target messaging as required.

1.2 Summary of Findings

The results of the segmentation provided us with five distinct segments:

- The Concerned (21% of survey respondents);
- The Engaged (29% of survey respondents);
- The Trusters (17% of survey respondents);
- The Stoics (22% of survey respondents); and
- The Skeptics (11% of survey respondents).

At a broad level, the segments can be thought of as falling on a quadrant with concern about COVID-19 on the x-axis, and trust in institutions on the y-axis.

The Concerned

Overall, the Concerned have a somewhat lower level of trust in institutions, particularly in businesses. Further, they do not feel the government wants to hear from people like them.

The Concerned are very worried about the transmission of COVID-19. They are afraid of personally getting the virus and strongly believe it will seriously affect their health if a family member or themselves contracts COVID-19.

The Concerned wholly understand and believe in asymptomatic spread. This segment gets very angry when they see others not adhering to public health measures, and features the largest majority of people who say government restrictions have not gone far enough.

The Engaged

The Engaged have a lot of trust in scientists and Canadian medical professionals. They are more likely to actively seek out information on COVID-19 and to closely follow the news on the pandemic.

For this segment, the COVID-19 situation is very serious. Further, they believe COVID-19 will seriously affect their health if a family member or themselves contracts COVID-19 and, they get very angry when they see others not adhering to public health measures. The Engaged are the segment most careful to adhere to all health and safety measures. A majority say government restrictions have not gone far enough.

The Trusters

As their name suggests, Trusters are characterized by very high levels of trust in all institutions, including governments, businesses, scientists, medical professionals, the pharmaceutical industry, and the news media. Further, they feel the government wants to hear from people like them and that experts always provide good advice. The Trusters are also the most likely to trust other Canadians in general.

The Trusters believe the COVID-19 situation is very serious. They are not overtly fearful but believe COVID-19 would greatly affect them if they contracted it. They are the segment most likely to say that recommendations from public health officials have been clear and easy to understand, and as such are careful to adhere to all health and safety measures.

Trusters are the only segment where a majority say that restrictions imposed by government have been about right, neither having gone too far nor not far enough.

The Stoics

The Stoics are quite trusting of institutions. Among all segments, they are the most likely to trust businesses.

The Stoics do not feel their health would be seriously affected by COVID-19 if they contract the virus and are the segment most likely to erroneously believe that COVID-19 cannot be spread asymptotically.

The Stoics tend to not mind so much when they see others defying public health guidelines. Nevertheless, when it comes to their own behaviour, they are more likely to adhere to public health measures than to ignore them. Comparatively, though, they are less cautious than other groups.

The Stoics do not feel they would be seriously affected by COVID-19 if they contract it and erroneously believe that COVID-19 cannot be spread asymptotically.

Generally speaking, the Stoics feel that the death rate has been deliberately and greatly exaggerated. They also believe it is difficult to find reliable and trustworthy information about COVID-19.

The Skeptics

Overall, the Skeptics are unique in their very strong mistrust of all institutions (government, business, the pharmaceutical industry, the news media, etc.). They believe experts are out of touch with ordinary people. They do not trust the government to do what is right nor do they believe the government wants to hear from people like them.

The Skeptics are the segment most likely to believe that the COVID-19 situation is overblown and that the death rate has been deliberately and greatly exaggerated. The vast majority of Skeptics believe government

restrictions have gone too far. They also are the only segment who believe wearing masks should be a personal choice rather than mandated by government.

The Skeptics are the least likely to know someone who has had COVID-19 and the least afraid to contract COVID-19 themselves. The Skeptics are the most likely to say they are tired of hearing about COVID-19 and the least likely to care when they see others not adhering to public health guidelines. Skeptics find it difficult to get reliable and trustworthy information on COVID-19 and do not find it easy to understand the recommendations by public health officials.

1.3 Methodology

An online survey was conducted among 2,002 Canadians, aged 18 years and older. Data collection was conducted from January 29th to February 5th and the survey was conducted using a panel sample. As such this constitutes a non-probabilistic sample, and margin of error therefore cannot be calculated nor can the findings be extrapolated to the broader Canadian population.

The results of the survey were used to undertake a Multi-Domain Segmentation (MDS). Multi-Domain Segmentation starts by finding linkages both within and between domains (attitudes, values, behaviours and profile characteristics) and uses these to divide the population into meaningful, addressable groups.

The key to the MDS analysis is to identify linkages between the various domains of information used to create the segmentation. We begin by separating the variables into two buckets, typically defined as “Key Behaviours” and those variables which can be used to explain those behaviours.

A canonical correlation analysis determines the strength of the relationship between the two sets of variables identified. Factors are identified across the two sets of variables, with loadings to determine the variables that contribute to each canonical dimension. Multiple iterations of this canonical correlation analysis allow us to determine the optimal set of variables to use across the two dimensions. The canonical factors then serve as the basis for deriving segments through the cluster analysis.

1.4 Contract Value

The total contract value for the project was **\$148,862.36** including applicable taxes.

1.5 Statement of Political Neutrality

I hereby certify as a representative of Kantar that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the *Policy on Communications and Federal Identity and the Directive on the Management of Communications*. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.



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