



Segmentation and insights programme: Employers and workers

FINAL REPORT: 21 DECEMBER 2021

KANTAR PUBLIC



WORKSAFE
NEW ZEALAND | MAHI HAUMARU
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Summary of findings

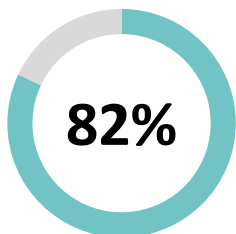
The findings in this report were obtained from nationwide surveys of 2,672 employers and 3,627 workers that took place from June to August 2021.

GREATER INTEGRATION OF HEALTH AND SAFETY IN NZ WORKPLACES SINCE 2019

NZ has more mature safety cultures (up 4 points to 56% of all NZ employers¹).

There is an especially strong shift among medium sized businesses (up 10 pts to 61%), Forestry employers (up 12 pts to 78%, and Agriculture employers (up 7 pts to 41%¹).

¹ This shift in employer maturity are statistically significant at the 90% confidence level.



...of employers have done something to address H&S in the last 12 months (e.g. changes to the work environment or equipment to reduce risk).

Nine positive employer attitudinal shifts have contributed to greater maturity, especially:

- More employers place H&S in their top 3 priorities (up 5 pts since 2019 to 53%)
- Regular audits are viewed as a normal part of business (up 5 pts to 48%)
- H&S is discussed in an open and helpful way (up 3 pts to 84%)
- Reducing harm is viewed as a big benefit of H&S (up 4 pts to 67%)
- Fewer employers view the cost of H&S as having little benefit (down 5 pts to 21%).

Employer knowledge of WorkSafe has also increased (up 5 pts to 94%).

INTEGRATING H&S INTO WORKPLACES DURING THIS COVID ERA HAS ALSO HAD ITS CHALLENGES

Both employers and workers faced heightened health and safety requirements over the last 18 months. Most of the tracking measures of worker capability, partnership and engagement have remained consistent since 2019.

However, with more emphasis on health and safety at work in this COVID era, this research also points to:

1. A possible 'settling in' period as worker and employers adjust to new health and safety norms, expectations and requirements. Since 2019, we see decreases (3 to 7 points) in 'always or mostly' carrying out these practices:
 - PPE use (the 2021 definition included breathing protection)
 - Safe use and maintenance of machinery and equipment
 - Musculo-skeletal harm prevention measures
 - Immediate hazard response
 - Workers reporting hazards, near misses and accidents.
2. Some workers feel more removed from influencing decisions and outcomes:
 - Fewer workers agreed 'they always have a say in decisions that affect their health and safety' (down 5 points to 65%)
 - Fewer workers are confident that they have the 'knowledge and skills to avoid long term health problems' (down 3 points to 79%).
3. Possible shifts in priorities in the Agriculture and Transport sectors as workers due to financial worries.

These employer concerns have grown a little:

- More employers describe H&S compliance as a big or very big cost (up 4 pts to 16%).
- More employers say it's not always practical to follow every rule (up 3 pts to 34%) and fewer employers say that taking risks is not accepted by anyone in the business (down 3 pts to 85%).

STRENGTHENING WORKER ENGAGEMENT REMAINS AN OPPORTUNITY

Almost everyone believes health and safety at work is important – it's human nature to want to be safe and well. But it's also a natural human response to be influenced by the cultural and social norms that exist in different workplace settings. We're also influenced by our past experiences, hold different beliefs and thresholds of personal risk, and face different job demands across and within industries. For these reasons, we have different capabilities to engage with health and safety at work.

Levels of worker engagement are fairly consistent with 2019.

Four in 10 workers are strongly engaged with health and safety.



When exposure to risk factors is held constant, less strongly engaged workers are **1.4** times more likely to experience **harm requiring medical attention or time off work.**

We looked at how behavioural influencers interact to drive engagement. We learnt that there are 4 interwoven themes that most profoundly impact worker engagement:

- The provision of **quality information** is the bedrock of H&S engagement, but it is not a strong direct driver of engagement itself. Rather it drives the ensuing beliefs and cultures that in turn impact H&S engagement.
- The belief that **H&S guidelines are both effective in reducing harm** and therefore the **right thing to do**. These are also the single biggest direct drivers of overall worker engagement.
- Worker confidence in their **own knowledge of H&S**. This is also related to confidence in **support from their boss to stop work or speaking up** when they see something risky.
- A **collaborative workplace culture** that builds worker capability through these beliefs and confidence. Particularly impactful is the sense that **everyone (from the boss down) is doing their bit** to improve H&S.

EDUCATION AND TRAINING ARE CRITICAL TO SAFER WORKPLACE CULTURES

Our data modelling reinforced that education is a linchpin factor indirectly driving worker engagement through many behavioural influencers. Education plays a strong role in shaping positive workplace cultures, directly influences workers' confidence in their ability to stay safe, and directly shapes beliefs that following guidelines is the right thing to do and results in less harm.

Opportunities exist to broaden the reach of education and training, support employer access to useful information (especially for smaller workplaces), and further promote the HASANZ register.

In the last 12 months:

- 31% of workers, and 40% of employers, received relevant and useful training on H&S
- 65% of workers received relevant and useful H&S information from their employer
- 59% of employers sought and found relevant and useful information on H&S
 - But most were guarded in their ratings, only 'slightly' agreeing it was easy to find, understand and relevant/useful
- 38% of employers sought advice from a H&S professional
- Just 17% of employers are aware of the HASANZ register

These results are much lower in immature safety cultures and smaller businesses.

Industry summary of **employer** results

This 'heat map' has been created using industry rankings for each measure. However, the numbers shown in each cell refer to the survey result for that measure.

Green depicts more positive results, while **red** depicts less positive results.

	All sectors	Forestry	Manufacturing	Healthcare and social assistance	Construction	Transport	Agriculture	Other
EMPLOYER SAMPLE SIZE	(2,672)	(198)	(402)	(173)	(374)	(363)	(317)	(845)
H&S is a top 3 priority	53%	85%	57%	55%	67%	63%	58%	46%
Mature safety cultures (top two segments) ¹	56%	78%	50%	65%	46%	56%	41%	59%
Standard process for reporting H&S issues	57%	78%	64%	64%	54%	60%	48%	55%
Have health and safety representative(s)	31%	63%	36%	39%	26%	35%	18%	30%
Policy for bullying and harassment	53%	67%	66%	63%	48%	55%	38%	52%
Policy for threats of violence	49%	60%	60%	58%	45%	52%	40%	49%
Average H&S actions taken in last 12 months (from list of 5)	1.9	3.3	2.3	1.9	2.1	2.1	2	1.8
PPE is used when it should be	88%	99%	88%	85%	94%	90%	91%	84%
Action is taken straightaway when a potential hazard is identified	98%	100%	97%	100%	98%	98%	97%	97%
Know a lot about WorkSafe	49%	88%	54%	45%	59%	54%	50%	44%
Received useful and relevant education or training (last 12 months)	40%	67%	38%	56%	45%	41%	33%	36%
Sought and found useful and relevant H&S information/guidance in last 12 months	59%	73%	59%	68%	61%	55%	55%	58%
Sought professional H&S advice/services in last 12 months	38%	75%	53%	31%	48%	41%	37%	32%
Awareness of HASANZ Register	17%	28%	27%	22%	18%	18%	15%	15%
H&S is discussed in an open and helpful way	78%	98%	79%	81%	83%	80%	81%	75%

Industry summary of **worker** results

This 'heat map' has been created using industry rankings for each measure. However, the numbers shown in each cell refer to the survey result for that measure.

Green depicts more positive results, while **red** depicts less positive results.

	All sectors	Forestry	Construction	Manufacturing	Agriculture	Healthcare and social assistance	Transport	Other
WORKER SAMPLE SIZE	(3,627)	(346)	(427)	(481)	(450)	(453)	(433)	(1,037)
H&S is a top 3 priority	37%	62%	44%	44%	44%	43%	46%	32%
PPE is used when it should be	81%	93%	87%	85%	84%	81%	78%	78%
Action is taken straightaway when a potential hazard is identified (at least most of the time)	81%	88%	85%	84%	87%	81%	77%	79%
Received useful and relevant training	31%	42%	37%	30%	26%	39%	34%	29%
Received useful and relevant information from employer	65%	79%	69%	64%	66%	67%	68%	63%
Satisfaction with the way employer deals with H&S issues raised by workers	71%	77%	72%	68%	76%	64%	66%	72%
Team or group H&S representative	45%	66%	47%	53%	40%	55%	55%	40%
Standard process for reporting H&S issues	61%	80%	58%	63%	57%	74%	70%	58%
Very strong worker engagement (Advocates/Attainers)	41%	48%	38%	45%	33%	41%	40%	41%
H&S is discussed in an open and helpful way (at least most of the time)	60%	76%	66%	65%	70%	60%	59%	58%
I always have a say in decision that affect my health and safety	65%	84%	80%	67%	77%	57%	58%	63%
Incidence of health problems in last 12 months	24%	21%	20%	24%	21%	29%	24%	25%
Incidence of physical harm in last 12 months	11%	17%	17%	8%	19%	12%	13%	10%

Background and research method



WorkSafe’s Workforce Segmentation and Insights Programme (WSIP) was conducted in 2019 and 2021 to deliver nuanced insight into workers and employers in New Zealand workplaces allowing WorkSafe to design targeted and effective communications and interventions.

Specific aims of the 2021 survey are to...

Measure current employer perspectives on workplace culture to understand the contextual barriers that workers face in staying healthy and safe.








Measure workers’ own engagement with health and safety practices.

Track improvements in workplace health and safety culture and worker engagement since 2019.

Deliver behavioural insights into the drivers of and barriers to safe/unsafe behaviours – the 2021 survey has a particular focus on the role of education and training.

Inform communications and intervention design.

Research methodology

		EMPLOYERS	WORKERS
SAMPLE SIZE		2,672 employers*. *including 47 businesses with no employees but had contractors, temps or freelance staff working for them.	3,627 workers.
METHODS		<ul style="list-style-type: none"> Online survey, with a phone pre-call to most respondents. 6,483 successful phone pre-calls were made in total. 	<ul style="list-style-type: none"> Online survey (2,360 workers). Telephone survey (758 workers in high risk sectors and Māori). Face-to-face intercept survey (200 workers in high deprivation areas). Push to web survey of Forestry and fishing (309)
SAMPLE FRAMES		<ul style="list-style-type: none"> ACC database of levy payers with liable earnings in last two years, supplemented with Martins employer database. In addition, 147 Forestry employers and 6 Fishing employers were sourced from: <ul style="list-style-type: none"> Safetree Certified Contractor register for forestry (66) WorkSafe Forestry email list (85) Maritime NZ marketing database of seafarers (6). 	<ul style="list-style-type: none"> Online panels (main source). Electoral Roll (for CATI and push-to-web methods) In addition, 40 Forestry workers and 6 Fishing workers were sourced from: <ul style="list-style-type: none"> Safetree Certified Contractor register for forestry (9) WorkSafe Forestry email list (31) Maritime NZ marketing database of seafarers (6)
FIELDWORK PERIOD		3 June to 28 August, 2021.	10 June to 19 August, 2021.
AVERAGE INTERVIEW LENGTH		19-minutes.	18 – 28 minutes (varied by method).
MAIN RESPONSE RATES		18% (refers to the proportion of all eligible employers who successfully took part in a phone pre-call <u>and</u> completed the online survey).	Online survey = 35% (for Colmar Brunton panel). CATI survey = 29%. Face-to-face survey = 65%.
DATA WEIGHTED		February 2020 Statistics NZ enterprise population data: business size within industry (ANZSIC06).	2018 Census data: age by gender within industry groups, and ethnicity.

Data limitations

All surveys have limitations. The limitations relating to this survey are noted below.

The surveys are samples of the target populations

The surveys of workers and employers are samples of the target populations of workers and employers. There are a number of limitations with these sample surveys with issues related to coverage and non-response (these apply to all sample surveys) that cannot be fully adjusted for. These factors mean that compared with a Census the findings from the sample surveys may not exactly represent the actual behaviours or attitudes of the surveys' target populations.

Weighting of the data to known population characteristics (described on the previous page) addresses these issues, but only with respect to the variables used in the weighting.

Margins of error

The next page details the number of interviews achieved in each industry, along with the respective maximum margin or errors. All estimated margins of error have been calculated at the 95% confidence level and assume simple random sampling. These maximum margins of error assume a survey result of 50%. As the survey result moves closer to 0% or 100% the margin of error decreases.

Self-reported information

All data in this report are based on self-reported information only. This should be taken into account when reading the report, particularly when reading findings related to levels of self-reported harm. As these are self-reported, they are not comparable with published industry harm statistics.

Sample sizes and margins of error* (industry level)

	EMPLOYERS		WORKERS	
	UNWEIGHTED SAMPLE SIZE	MAXIMUM MARGIN OF ERROR	UNWEIGHTED SAMPLE SIZE	MAXIMUM MARGIN OF ERROR
Agriculture	317	±5.5%	450	±4.6%
Forestry	198	±7.0%	346	±5.3%
Manufacturing	402	±4.9%	481	±4.5%
Construction	374	±5.1%	427	±4.7%
Transport, postal and warehousing	363	±5.1%	433	±4.7%
Healthcare and social assistance	173	±7.5%	453	±4.6%
Other	845	±3.4%	1037	±3.0%

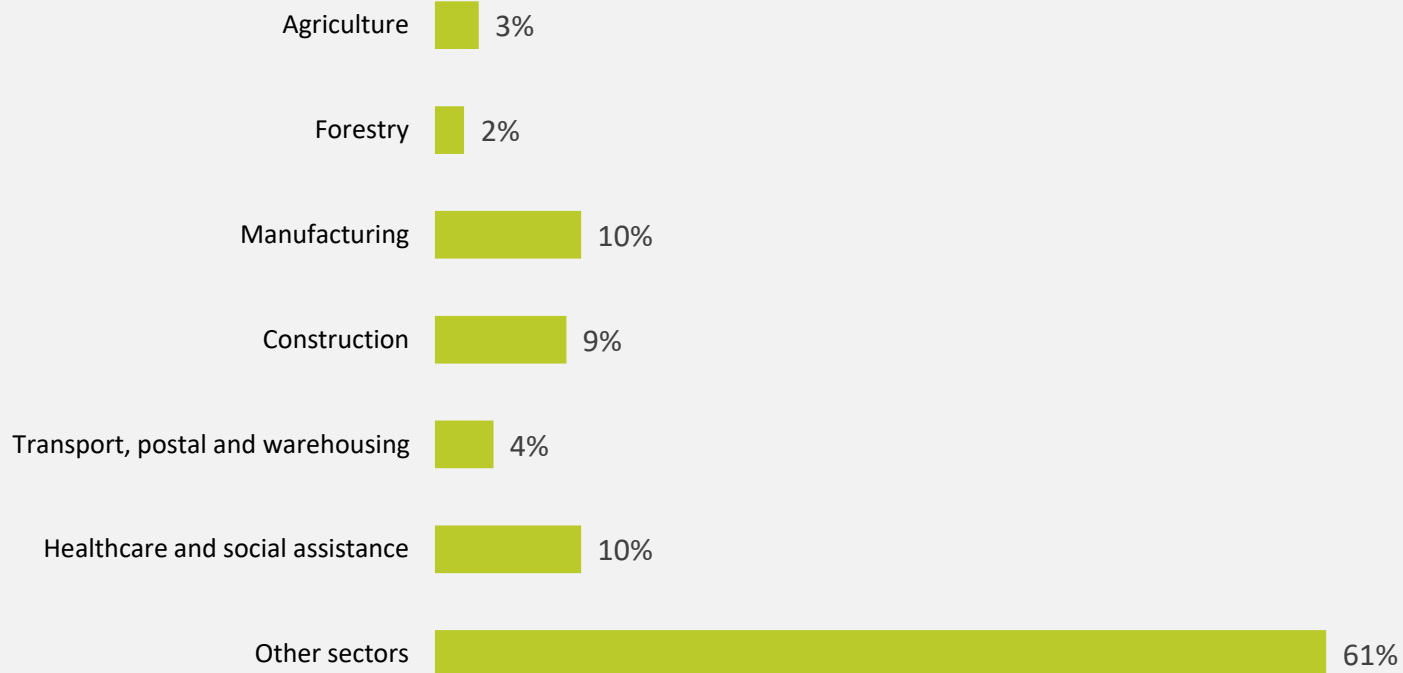
Total sample size: All employers (2,672) and all workers (3,627)

Who we surveyed – WORKERS

Weighted proportion of workers surveyed

INDUSTRY

%



Base: All workers (3,627) Source: S2

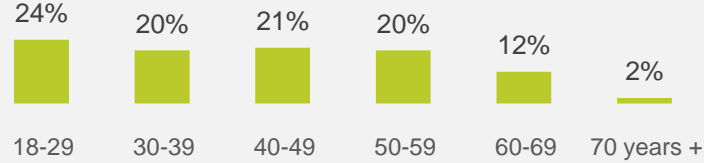
Who we surveyed – WORKERS

All data on this chart is weighted.

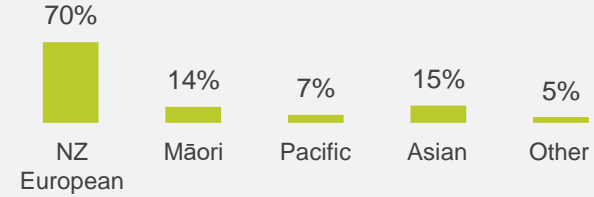
GENDER¹



AGE



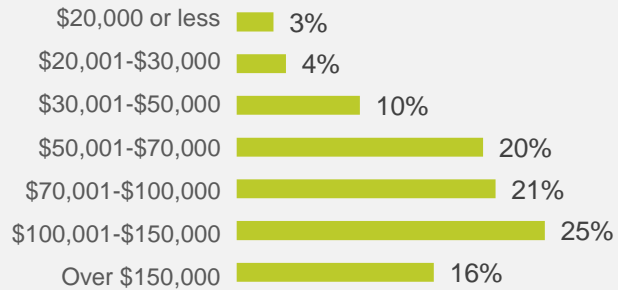
ETHNICITY



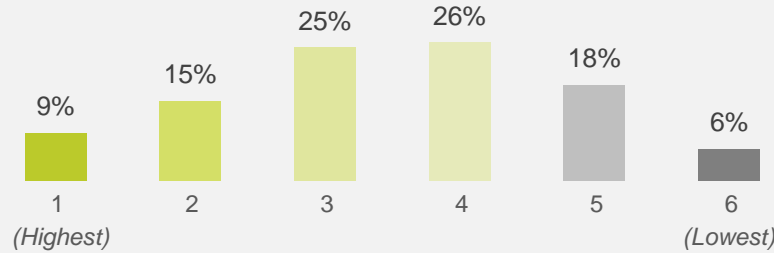
DEPENDENT CHILDREN



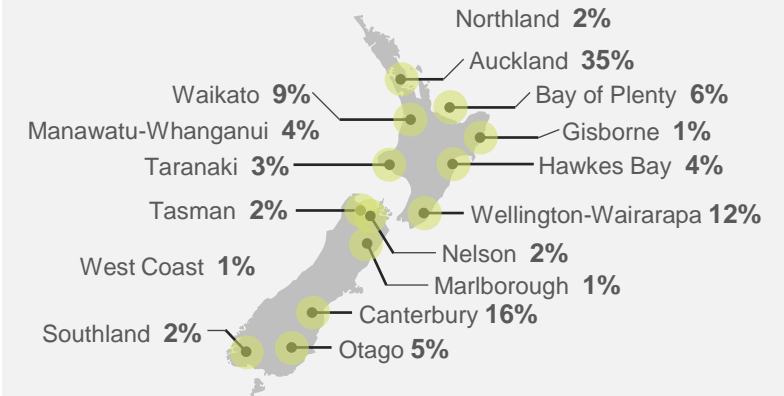
HOUSEHOLD INCOME



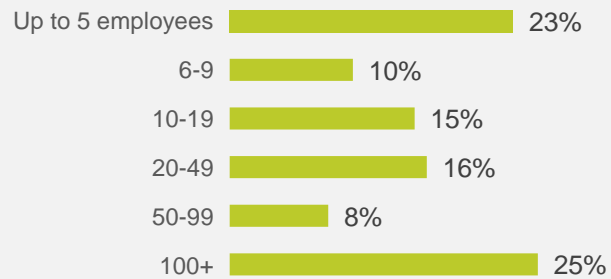
SOCIO-ECONOMIC STATUS LEVEL²



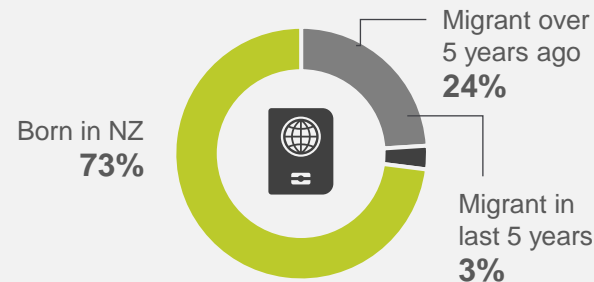
LOCATIONS OF WORK



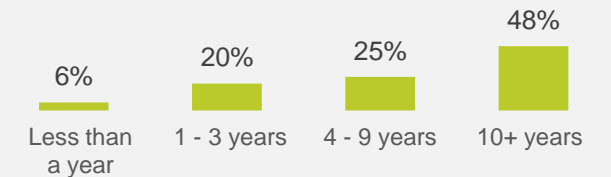
SIZE OF EMPLOYER



ORIGIN OF WORKERS



LENGTH OF TIME IN INDUSTRY

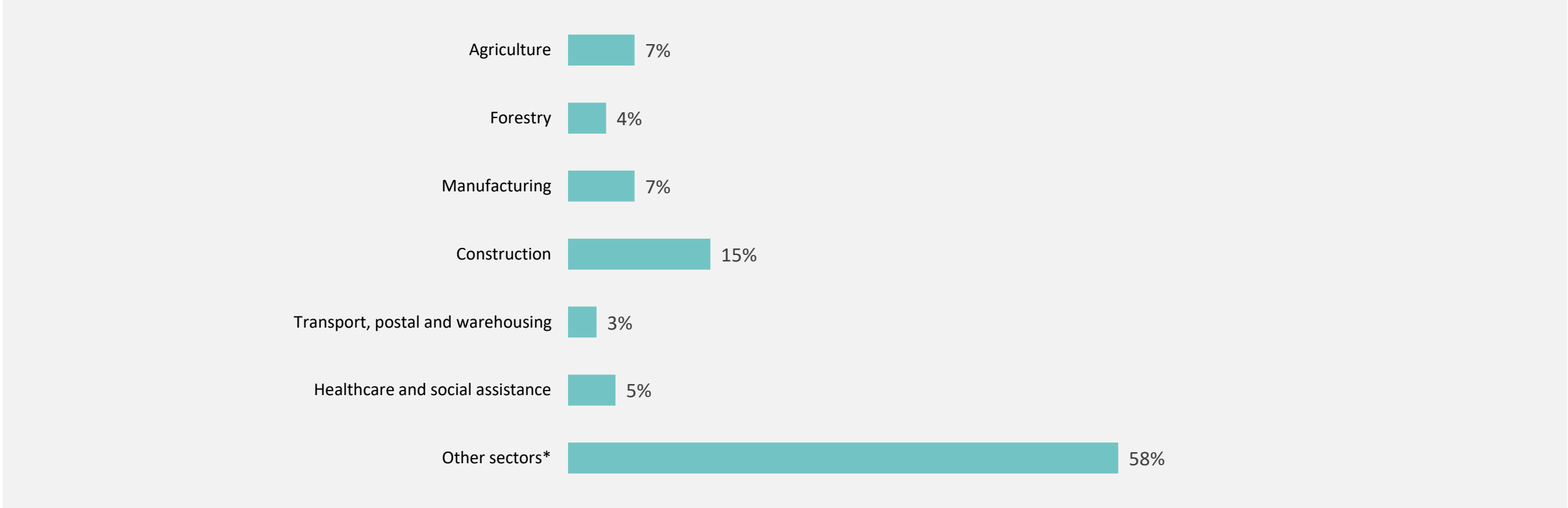


Who we surveyed – EMPLOYERS

Weighted proportion of employers surveyed

INDUSTRY

%



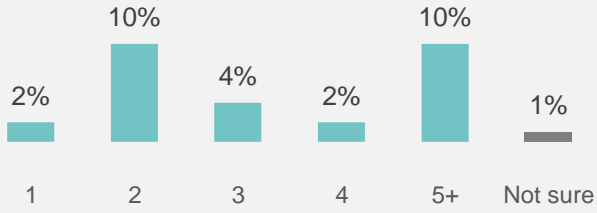
Base: All employers (2,672). Source: ACC levy database

*The 'Other' category consists of Commercial fishing (1%), Electricity and gas/Water and waste (0.3%), Wholesale trade (5%), Retail trade (9%), Accommodation (9%), Information media and telecommunications (0.8%), Financial and insurance services (2%), Rental, hiring and real estate services (4%), Professional, scientific and technical services (10%), Education and training (4%), Arts and recreation services (2%), and Other (12%).

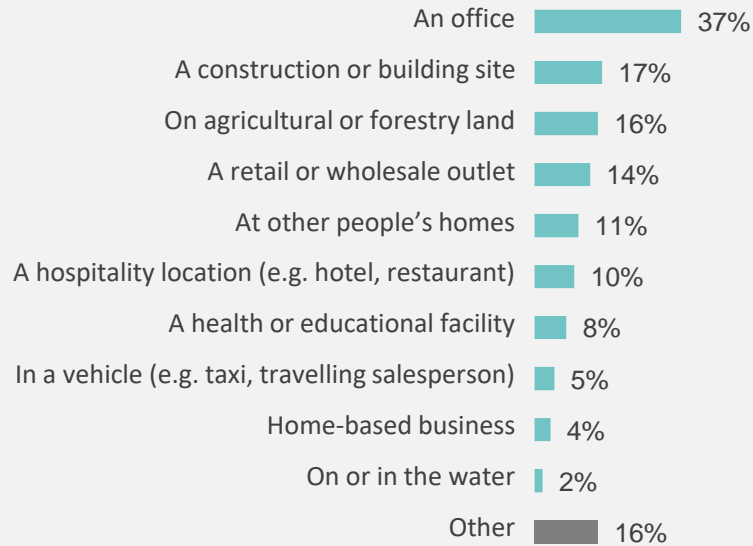
Who we surveyed – EMPLOYERS

All data on this chart is weighted.

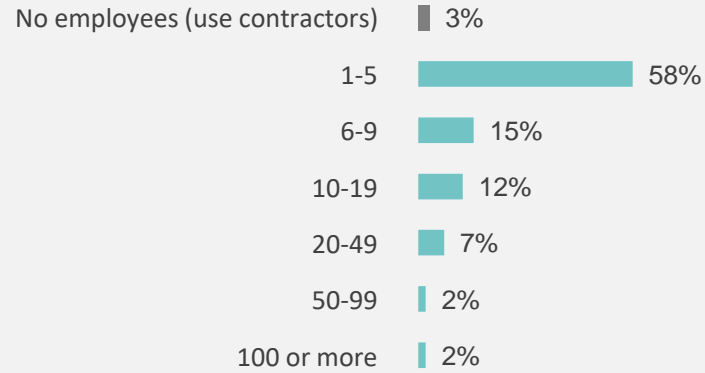
NUMBER OF SITES



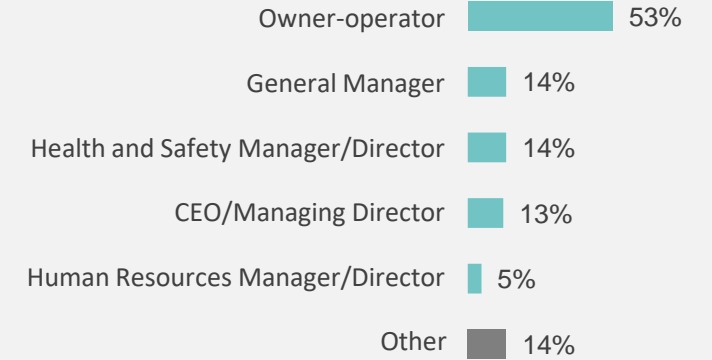
LOCATION OF WORK



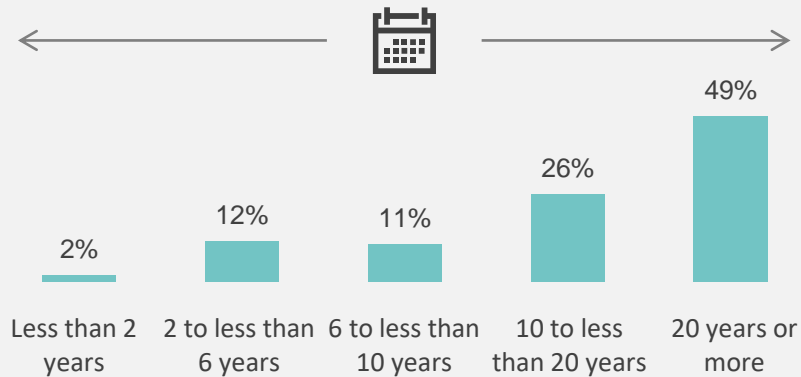
NUMBER OF EMPLOYEES



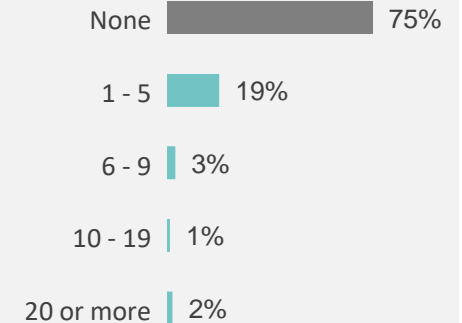
RESPONDENT'S ROLE



LENGTH OF TIME IN INDUSTRY



MIGRANT WORKERS



Integrating H&S into business



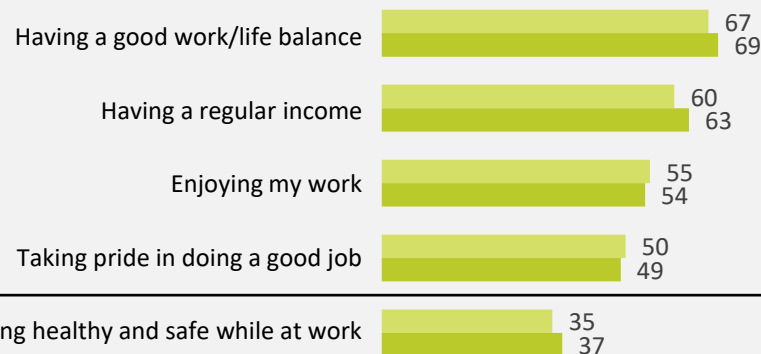
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More employers now make health and safety the top priority (up 5 points since 2019). While little movement is evident among workers overall, heightened financial worries has resulted in Agriculture workers giving a lower importance ranking for health and safety.

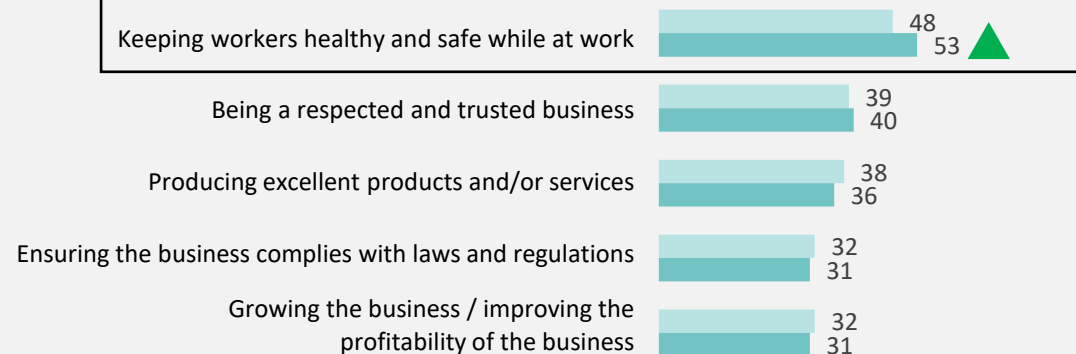
ALL WORKERS: TOP PRIORITIES IN WORK



Base: All workers (4,196 in 2019, 3,627 in 2021)

▼ In Transport (53% → 46%); at the expense of prioritising more regular income.

ALL EMPLOYERS: TOP PRIORITIES IN WORK



Base: All employers (3,838 in 2019, 2,672 in 2021)

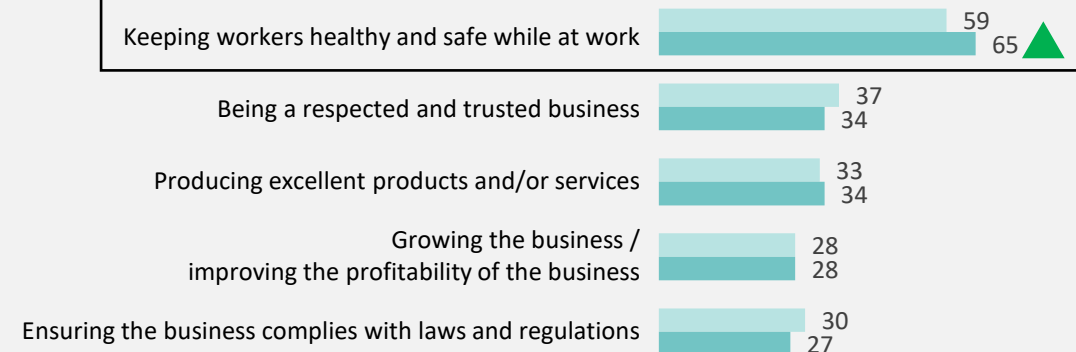
WORKERS IN PRIORITY SECTORS



Base: All workers in Agriculture, Forestry, Manufacturing and Construction (1,705 in 2019, 1,704 in 2021)

▼ In Agriculture (52% → 44%); at the expense of prioritising more regular income.

EMPLOYERS IN PRIORITY SECTORS



Base: All employers in Agriculture, Forestry, Manufacturing and Construction (1,427 in 2019, 1,291 in 2021)

■ 2019 ■ 2021

■ 2019 ■ 2021

Four employer cultural landscapes were first established in our 2019 research and replicated in 2021.

PASSIVE

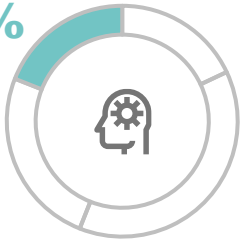
- Undertake little review
- Question legislation and don't see value in it
- Behaviour is externally triggered

DYNAMIC

- Active in all facets of H&S
- Constantly monitor and review H&S policies and procedures
- View H&S as an evolving concept
- Accepting of legislation (and reasons behind it)
- Internally motivated

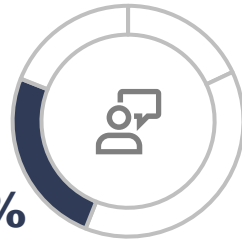
It's just common sense

19%



All talk, little walk

25%



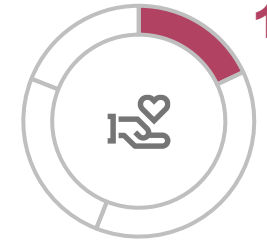
Protect me and mine

38%



Care for others

18%



Immature safety culture

- H&S lacks relevance
- Resent bureaucracy
- Cost to the business
- No safety measures beyond compliance
- Relies on own knowledge and experience and workers using common sense

Developing safety culture

- Management on board with safety, but little follow-through
- Disconnect between management and staff
- Staff question rules and procedures
- 'Keeping the peace' overrides enforcement

Autonomous safety culture

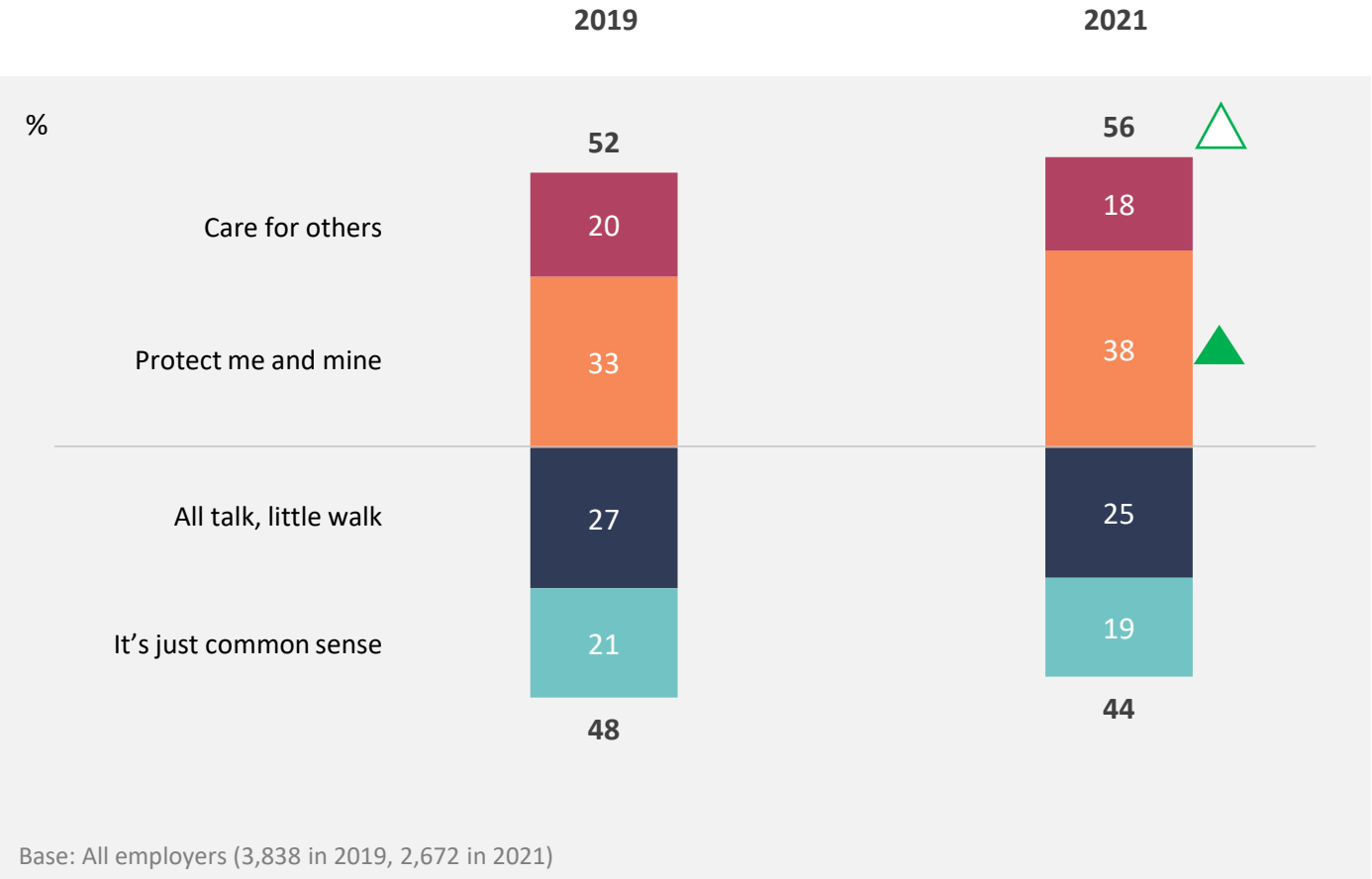
- Responsibility lies with everyone (individually)
- Desire to protect, self, business, livelihood
- Acknowledge consequences of unsafe behaviour
- Accept rules

Co-operative safety culture

- Shared responsibility, with two-way employer-worker dialogue
- Desire to care for wellbeing and safety of others (manaaki)
- Holistic view – physical and psychosocial (across contexts)
- Strong, evolving culture

Compared to 2019, there has been a shift towards a more mature safety culture. This shift largely stems from medium sized employers.

CHANGE IN SIZE OF MATURITY SEGMENTS

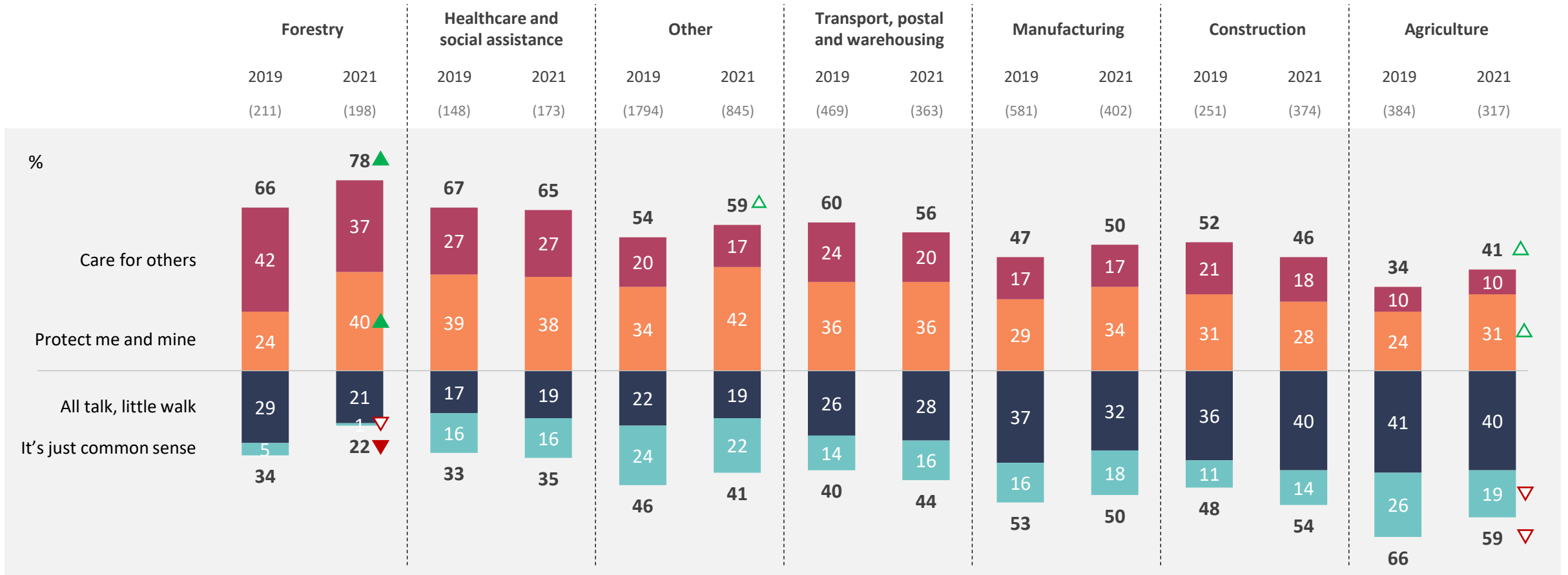


- Increase in two mature segments stems from:**
- Medium size employers (6-49 employees) 61% ▲ 10pts
 - Been in business 10+ years 56% ▲ 6pts
 - Forestry 78% ▲ 12pts
 - Agriculture 41% ▲ 7pts
 - 'Other' 59% ▲ 7pts

△ Statistically significant increase (90% confidence level)
 ▲ Statistically significant increase (95% confidence level)

The rise in mature safety cultures has stemmed from significant increases in Forestry, Agriculture, and 'Other' sectors.

EMPLOYER MATURITY SEGMENTS BY INDUSTRY



Base: Employers (base sizes on chart)

Nine attitudinal improvements have moved employers towards a more mature safety culture.

More employers now say that...

Formal safety audits at regular intervals are a normal part of our business	48% agree	Up 5 pts
As an employer, I feel a strong sense of responsibility for the mental health (e.g. depression, anxiety, stress) of staff and how well they get on with others	87% agree	Up 3 pts
Things that put health and safety at risk (such as hazards, near misses and accidents) are discussed in an open and helpful way in your business	84% say at least half the time	Up 3 pts
View H&S as a top priority	53% in top 3	Up 5 pts
They benefit from H&S in that it results in less harm or fewer injuries	67% a big or great deal	Up 4 pts

More employers now reject these sentiments...

As long as each person takes personal responsibility for their own health and safety, I'm not too concerned if they don't proactively look out for the safety of others	17% strongly <u>disagree</u>	Up 3 pts
Management wouldn't need to get involved in health and safety if workers just used their common sense	56% <u>disagree</u>	Up 5 pts

Fewer employers now believe that...

Complying with health and safety regulations is a cost to our business , with little benefit	21% agree	Down 5 pts
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After reading a scenario that depicted a Co-operative safety culture (Care for others), more employers...

Embraced the idea of this ideal	67% score 8-10 ¹	Up 4 pts
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Three negative shifts have worked against progress since 2019.

More employers now say that...

The **financial cost** of complying with health and safety regulations is **big**

16%

a big or very big cost

Up 4 pts

Health and safety is important, but it's **not always practical** for us to follow every rule and guideline

34%

agree

Up 3 pts

Fewer employers now say that...

Taking **risks** around safety is **not accepted** by anyone in our business

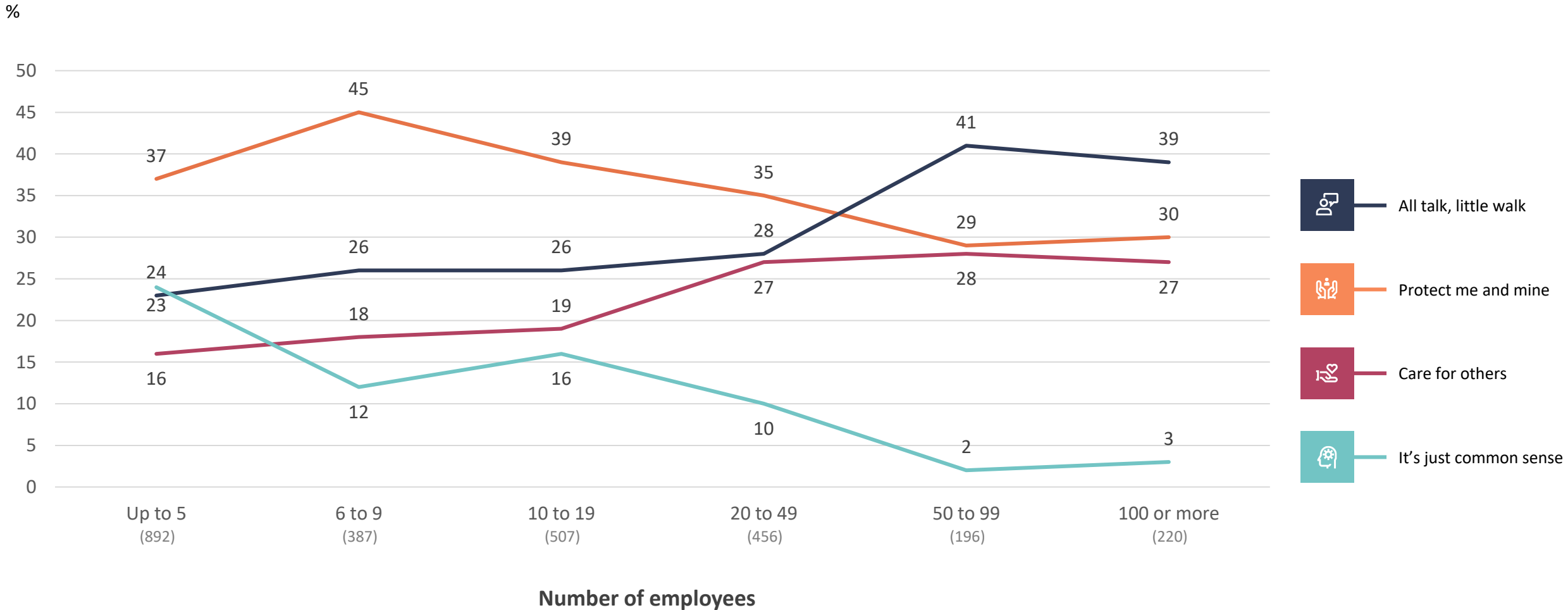
85%

agree

Down 3 pts

Employer cultural landscapes continue to vary by business size.

Protect me and mine and *It's just common sense* prevail among smaller employers, whereas *Care for others* and *All talk, little walk* become more prevalent as business size increases.



The two mature segments employ over half (59%) of NZ workers, whereas the two less mature segments employ 41%.

PROFILES OF EMPLOYER SEGMENTS

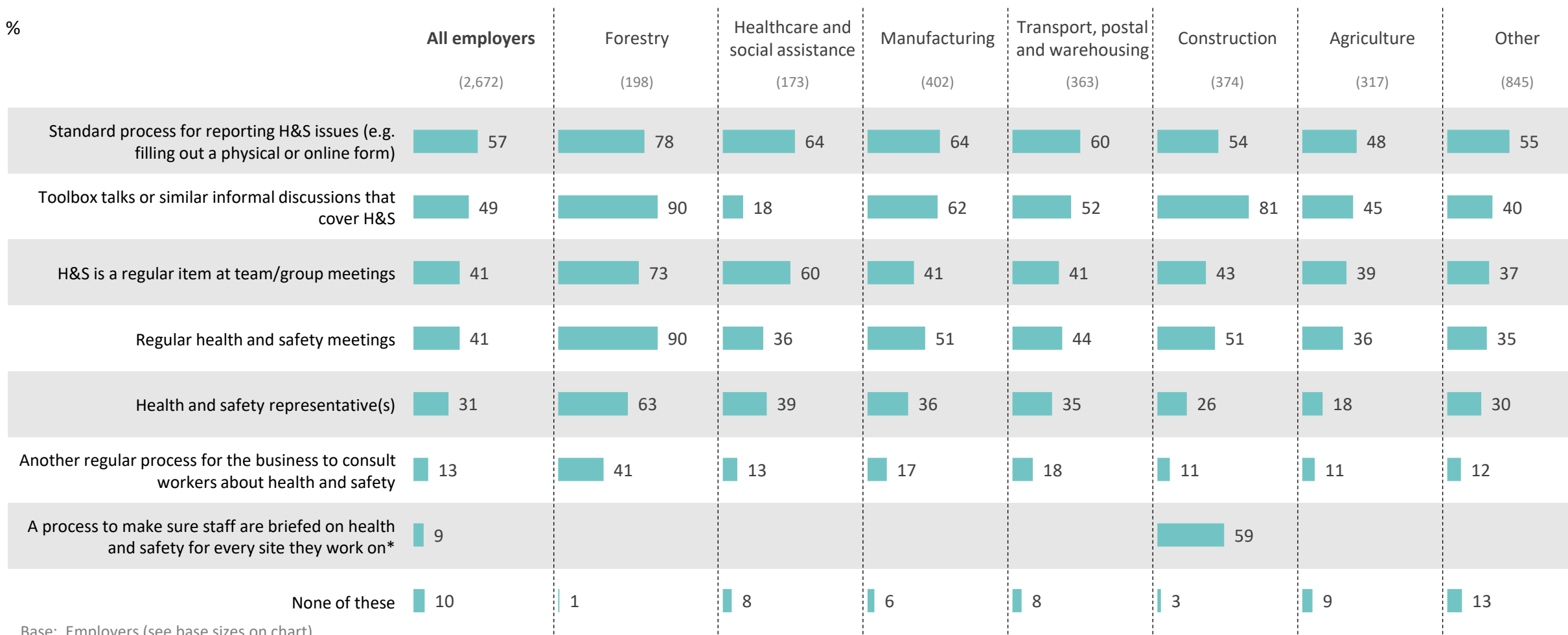
	It's just common sense	All talk, little walk	Protect me and mine	Care for others
Employer size (number of employees)				
% of employees in NZ workforce employed by this segment¹				
Multi-site employer	21%	29%	23%	32%
Employs migrant workers	17%	27%	25%	30%

Source: 2021 Employer survey.

¹ Source: Employee projections estimated using Statistics New Zealand 2020 data on employee counts within enterprise size groupings: businesses with 1-5 employees have on average 2.4 employees, businesses with 6-9 employees have on average 7.2 employees, businesses with 10-19 employees have on average 13.4 employees, businesses with 20-49 have on average 29.9 employees, businesses with 50-99 employees have on average 68.8 employees, and businesses with 100+ employees have on average 419.4 employees.

Less than six in ten employers have a standard reporting process for H&S issues. H&S practices are most integrated in Forestry. Additional analysis shows each of these practices climb steeply with employer size. Employer size plays a role for Construction and Agriculture in particular as these sectors have higher proportions of small businesses.

POSITIVE HEALTH AND SAFETY PRACTICES IN THE WORKPLACE

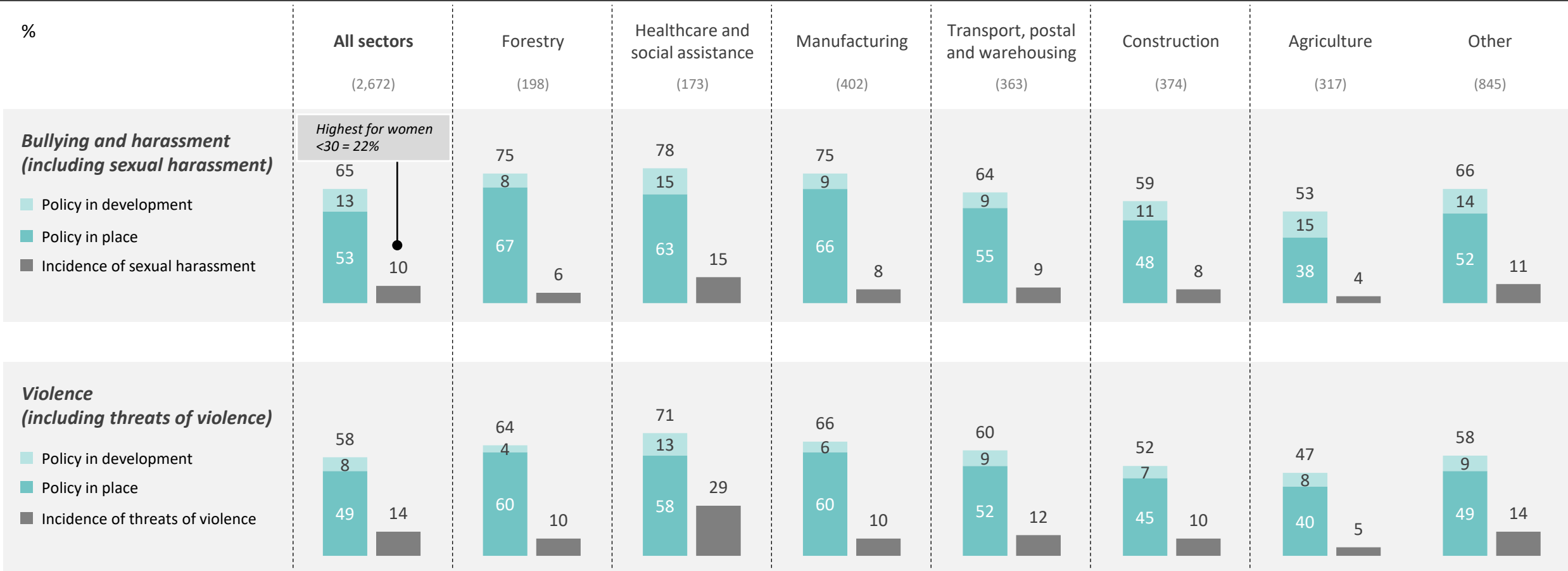


Base: Employers (see base sizes on chart)

*Only Construction sector employers were asked about this practice.

Only around half of employers have policies in place for bullying and harassment, and violence, despite one in ten workers reporting sexual harassment and one in seven workers reporting threats of violence in the last 12 months.

POLICIES ON BULLYING AND HARASSMENT, AND VIOLENCE

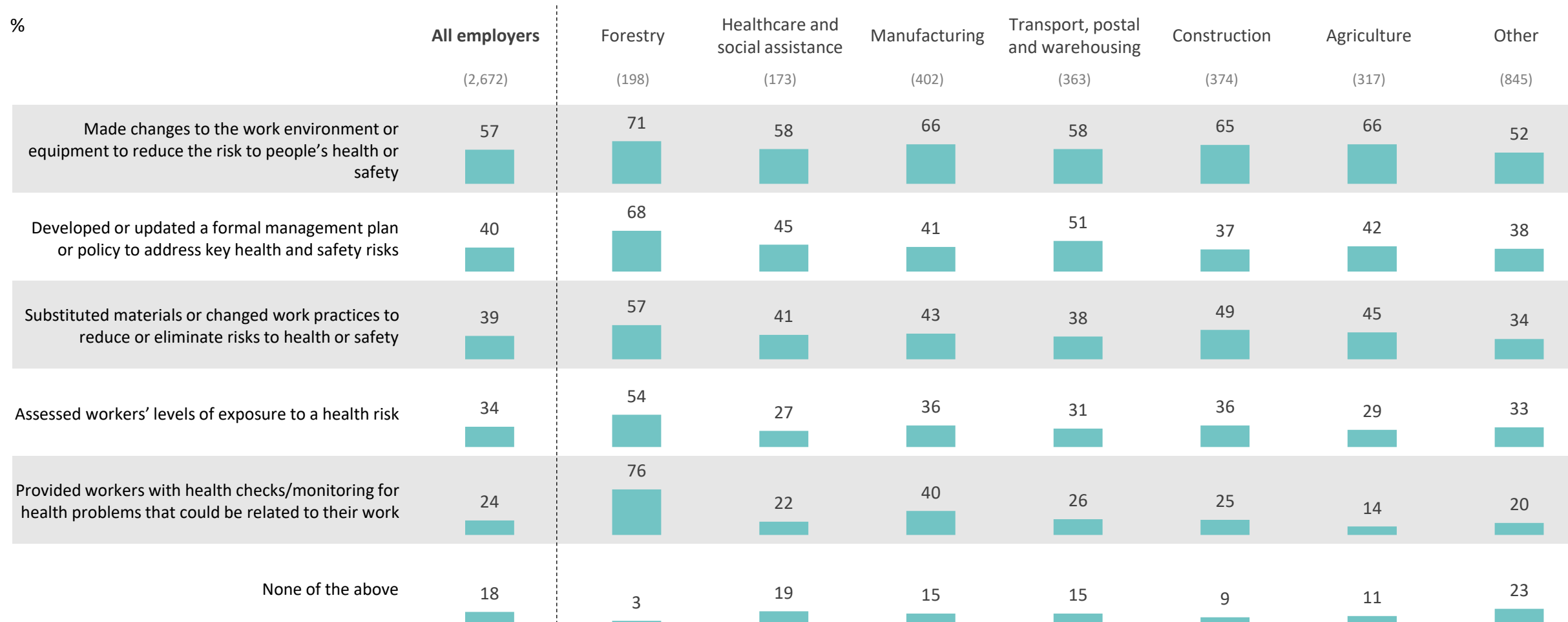


Base: Varies by industry. Total sample base sizes are 2,672 for employers and 3,627 for workers.

The likelihood of having these policies in place increases markedly by employer size: among employers with 50+ employees, 82% have a bullying and harassment policy in place and 74% have a policy for violence in place.

Most employers (82%) have acted to address H&S in the last 12 months, most commonly changes to the work environment or equipment to reduce risks.

H&S ACTIONS TAKEN IN LAST 12 MONTHS

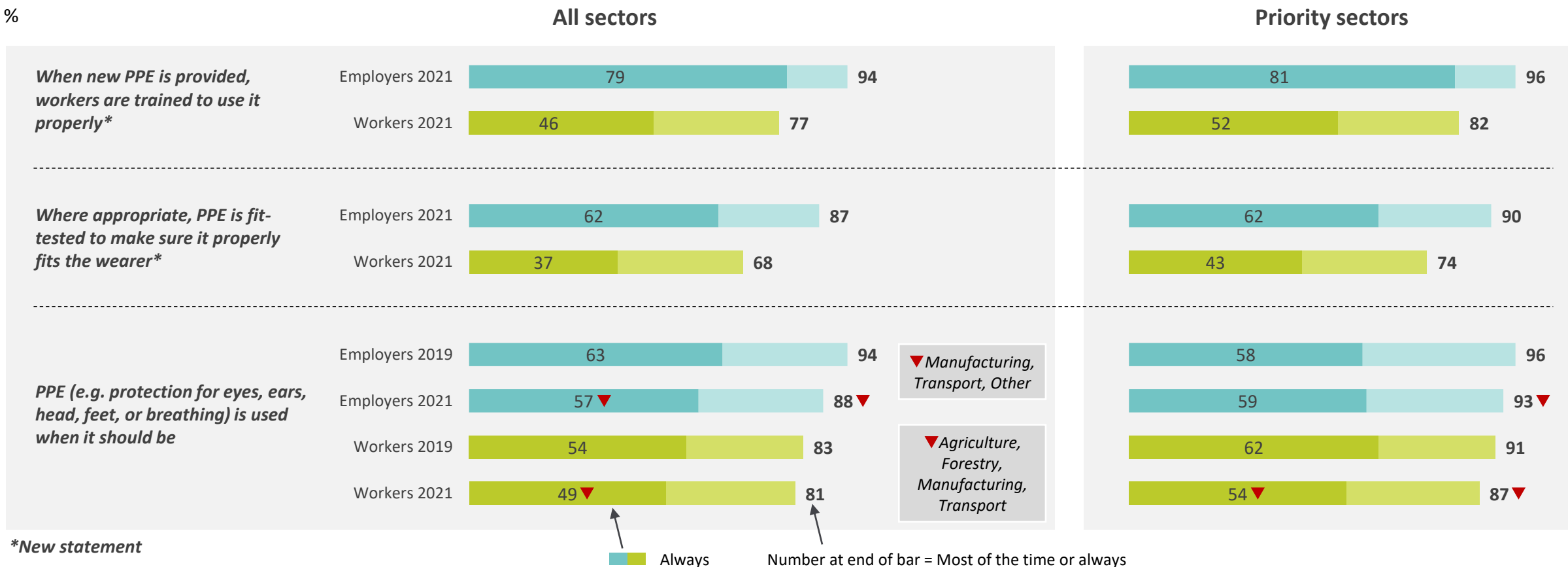


Base: 2021 survey data (see base sizes on chart)

Since 2019, fewer employers and workers report PPE being used when it should be. Note, breathing protection was introduced in the 2021 definition. Perception gaps between employers and workers are especially evident in relation to the provision of PPE training and fit-testing.

POSITIVE HEALTH AND SAFETY BEHAVIOURS: PPE

%



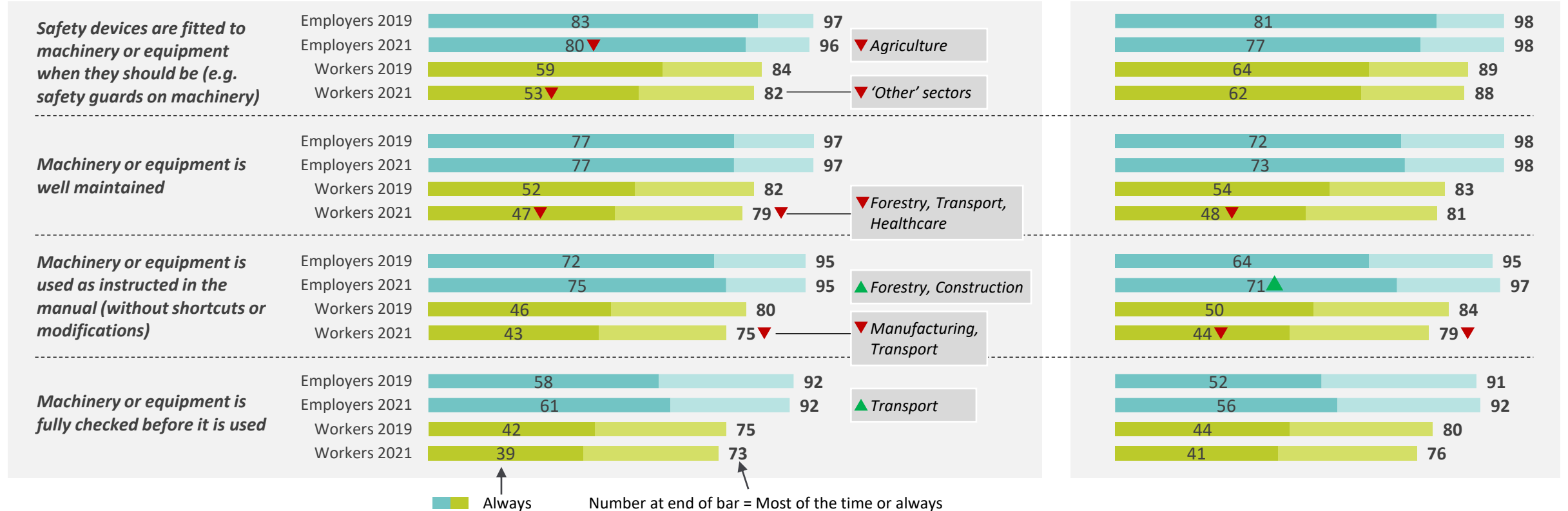
All employers excluding 'not applicable' responses. 2021 base sizes = 1,915 to 2,232 (all employers and 1,060 to 1,208 (employers in priority sectors).
 All workers excluding 'not applicable' responses. 2021 base sizes = 3,053 to 3,164 (all workers) and 1,573 to 1,639 (workers in priority sectors)

▼ Statistically significant decrease since 2019 (at the 95% confidence level)

Small declines in the safe use and maintenance of machinery and equipment are evident since 2019 (mainly from workers). Perception gaps between employers and workers are again evident.

POSITIVE HEALTH AND SAFETY BEHAVIOURS: MACHINERY OR EQUIPMENT

%



All employers excluding 'not applicable' responses. 2021 base sizes = 1,946 to 2,248 (all employers) and 1,144 to 1,203 (employers in priority sectors).
 All workers excluding 'not applicable' responses. 2021 base sizes = 2,947 to 3,183 (all workers) and 1,620 to 1,638 (workers in priority sectors)

▲▼ Statistically significant change since 2019 (at the 95% confidence level)

Small declines in worker perceptions of immediate response to hazards and measures to prevent musculo-skeletal harm are also evident since 2019.

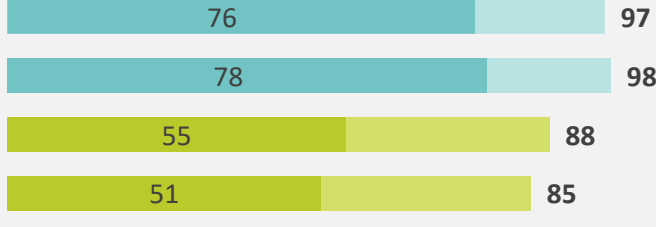
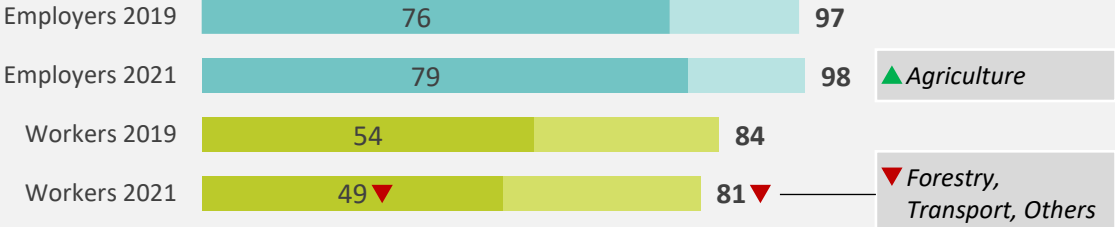
OTHER POSITIVE HEALTH AND SAFETY BEHAVIOURS

%

All sectors

Priority sectors

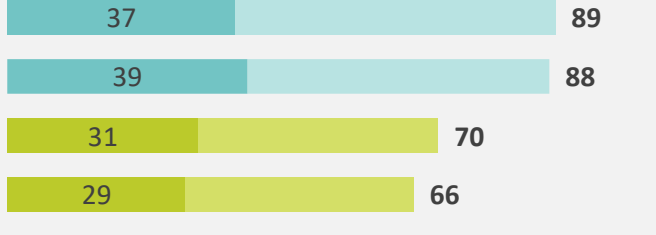
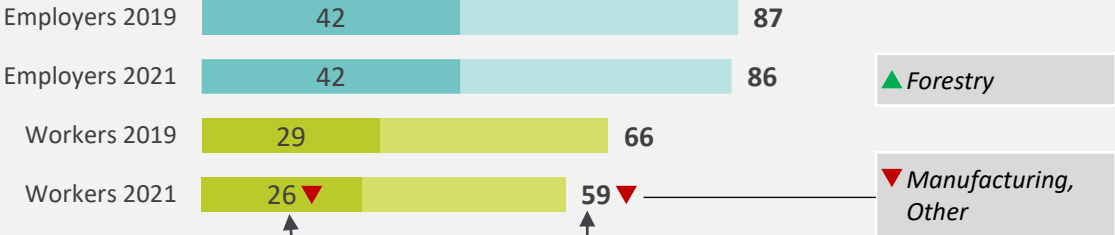
Action is taken straight away when a potential hazard is identified



Measures to prevent harm from dusts or other airborne substances



Measures to prevent harm from awkward or repetitive body movement, or long periods of standing/sitting (e.g. variety in job tasks)



Always Number at end of bar = Most of the time or always

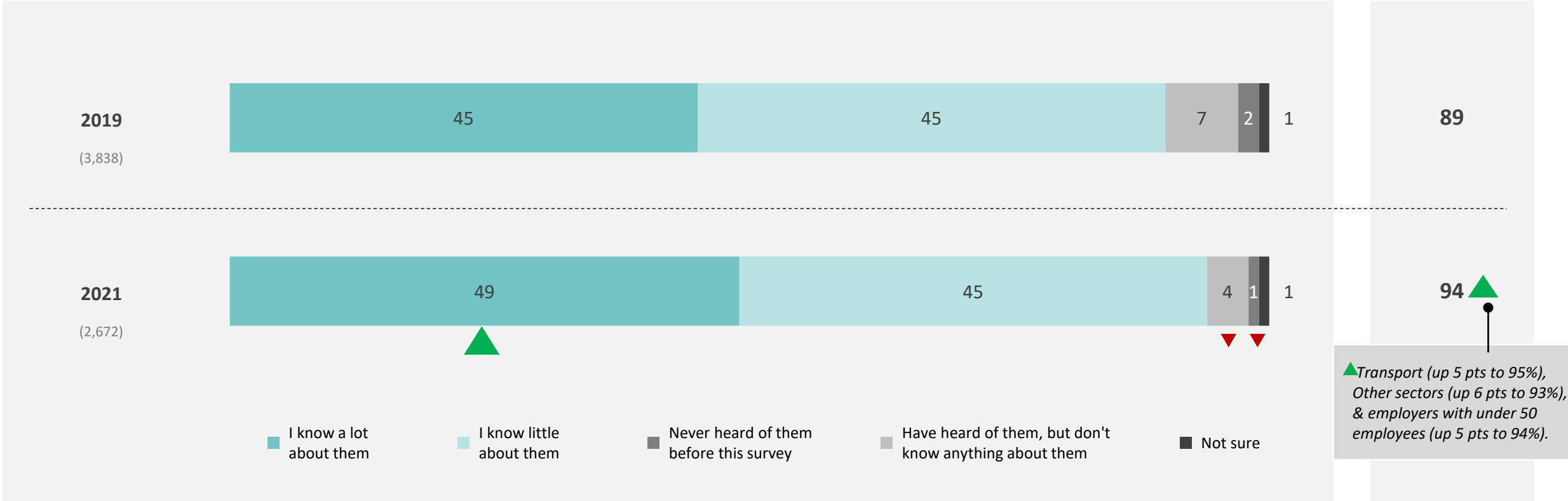
All employers excluding 'not applicable' responses. 2021 base sizes = 1,694 to 2,525 (all employers) and 1,027 to 1,256 (employers in priority sectors).
 All workers excluding 'not applicable' responses. 2021 base sizes = 2,927 to 3,480 (all workers) and 1,539 to 1,672 (priority workers)

▲▼ Statistically significant change since 2019 (at the 95% confidence level)

Knowledge of WorkSafe has increased since 2019 (up 5 points). This increase stems from employers with fewer than 50 employees.

KNOWLEDGE OF WORKSAFE

%

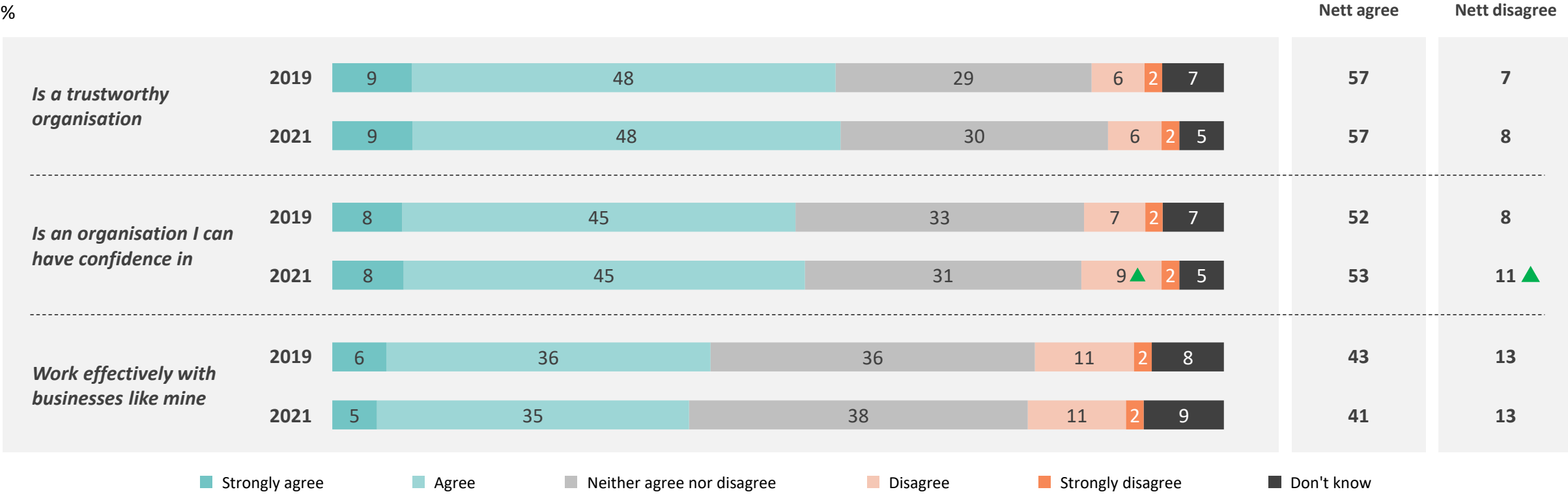


Base: All employers

▲ ▼ Statistically significant change since 2019 (at the 95% confidence level)

Perceptions of WorkSafe are fairly consistent with 2019. Lack of confidence in WorkSafe has risen slightly (up three points to 11%).

PERCEPTIONS OF WORKSAFE



▲ Improved perceptions in Transport

- Trustworthy (up 11 pts to 61% agree)
- Confidence in WorkSafe (up 10 pts to 58% agree)

▼ Worsened perceptions in Construction

- Work effectively with businesses (down 9 pts to 41% agree)
- Confidence in WorkSafe (down 10 pts to 49% agree)

Base: All employers who know 'a lot or a little' about WorkSafe (3,580 in 2019, 2,577 in 2021)

A capable and educated workforce: workers



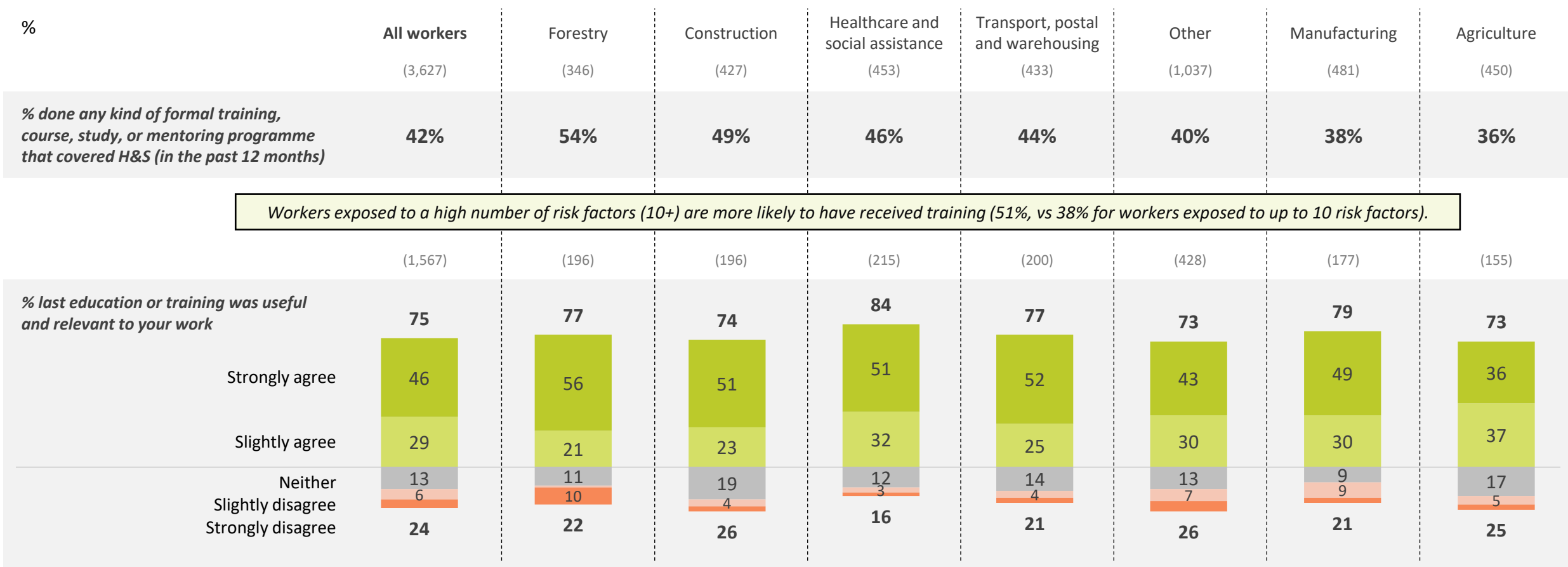
KANTAR PUBLIC



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AOTEAROA

Around four in ten (42%) workers have received training or education covering health and safety in the last 12 months; three quarters of these workers found it to be useful and relevant to their work. This equates to 31% of all workers receiving useful and relevant education/training.

INCIDENCE AND USEFULNESS OF TRAINING / EDUCATION IN LAST 12 MONTHS



Base: Incidence of training/education based on all workers.

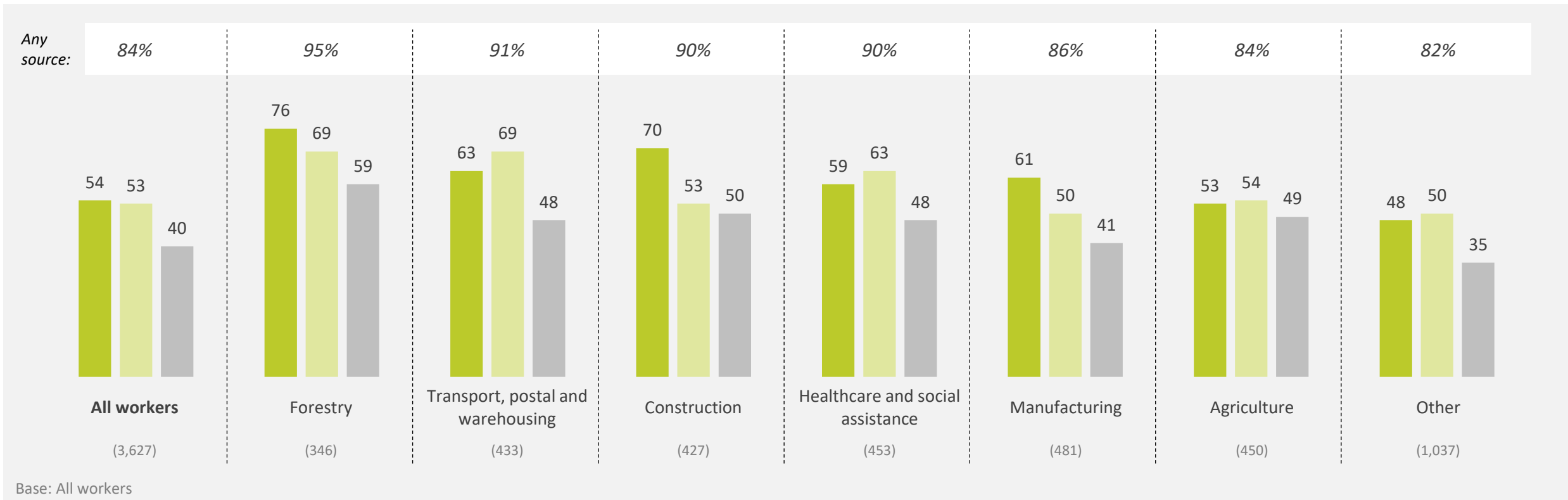
Ratings of training/education based on those who had received training/education that covered H&S in the last 12 months.

A large majority (84%) of workers report that their employer provided some kind of H&S information in the last 12 months. Around half received a briefing, training or induction session (54%), and half were given information to read (53%).

HOW ORGANISATION HAS PROVIDED INFORMATION ABOUT HOW TO KEEP HEALTHY AND SAFE AT WORK IN THE LAST 12 MONTHS

%

Workers exposed to a higher number of risk factors (6+) are somewhat more likely to have received information/guidance (88%, vs 80% for workers exposed to up to 5 risk factors).



Base: All workers

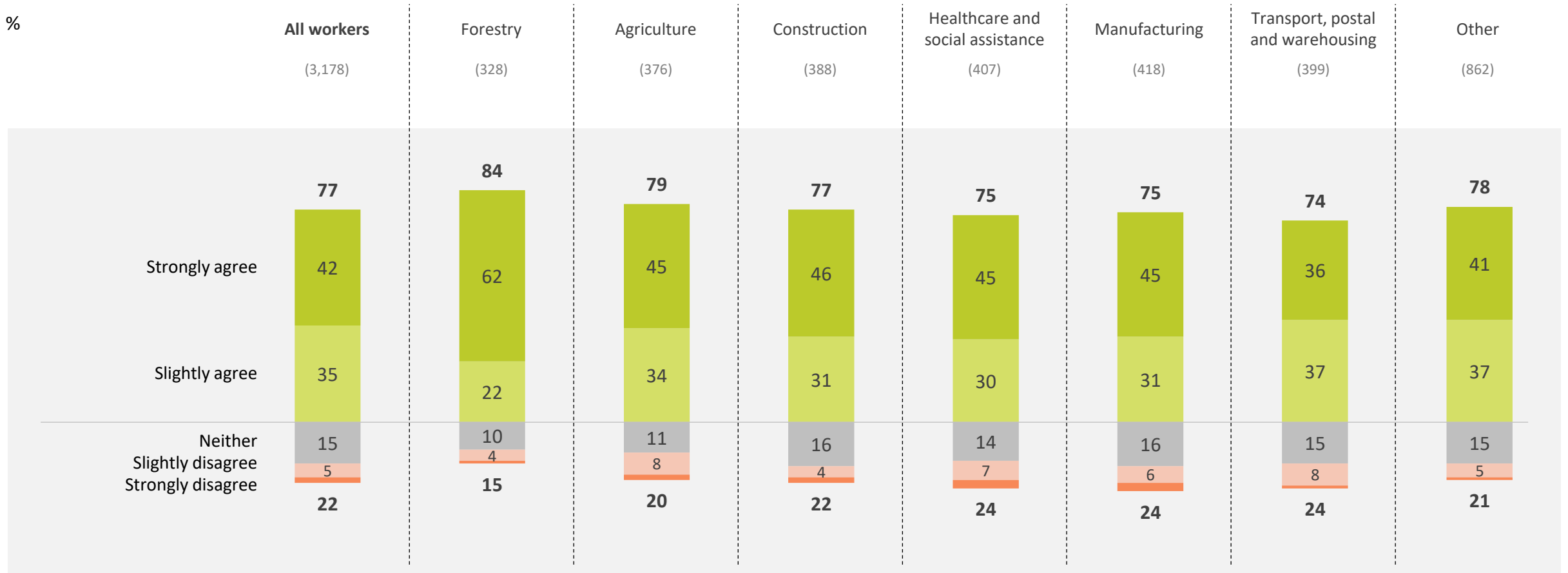
■ H&S briefings, training, or induction sessions

■ Information to read – online or printed

■ Informal conversations with your boss or other senior colleague

Just over three quarters (77%) of workers who received H&S information found it useful and relevant to their work. This equates to 65% of all workers receiving useful and relevant information.

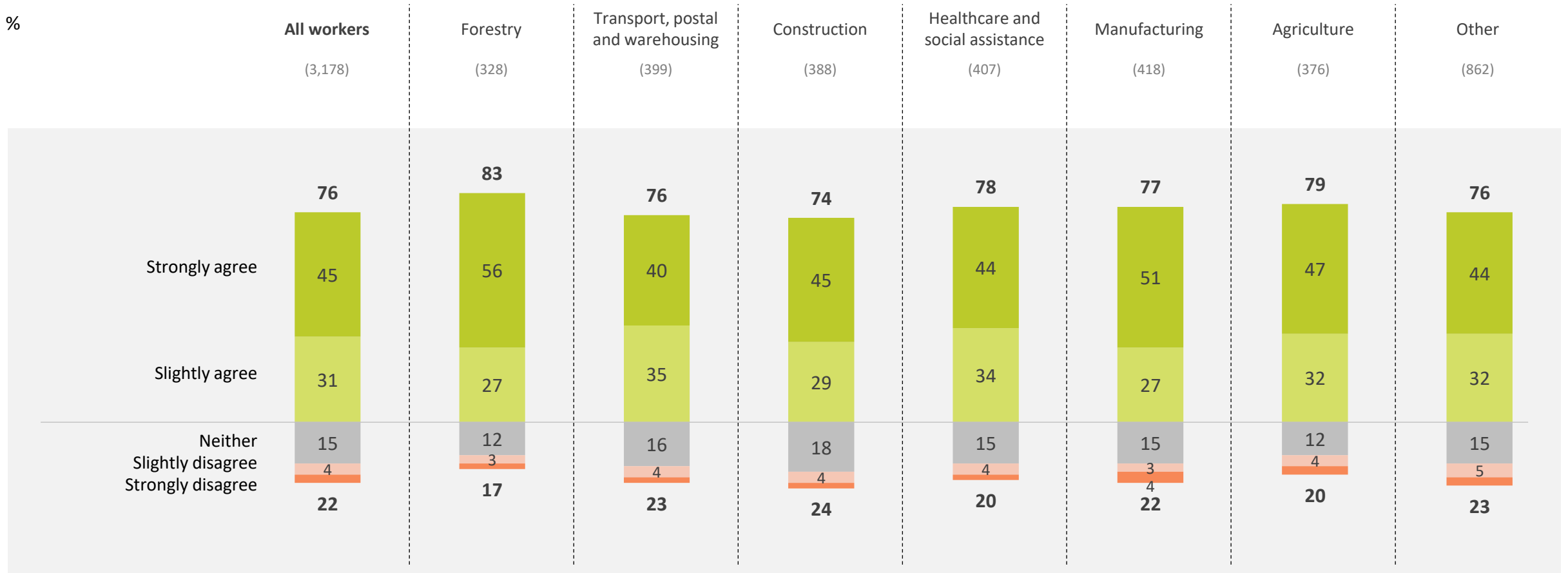
RATINGS OF INFORMATION – USEFUL AND RELEVANT TO MY WORK



Base: All workers whose organisation provided information about how to keep healthy and safe at work in the last 12 months (base sizes on chart).

Likewise, around three quarters of workers who received information found it easy to understand.

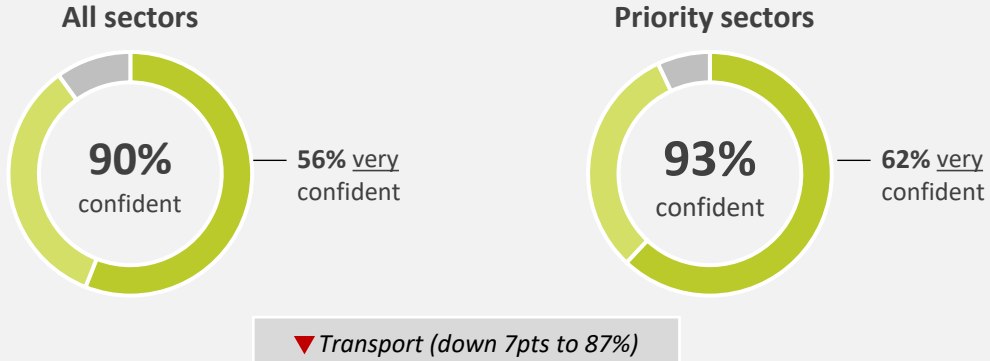
RATINGS OF INFORMATION – EASY TO UNDERSTAND



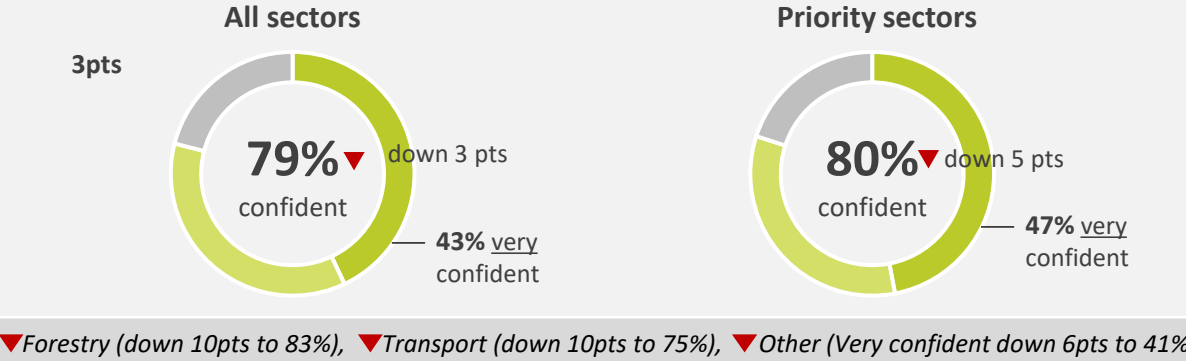
Base: All workers whose organisation provided information about how to keep healthy and safe at work in the last 12 months (base sizes on chart).

Worker confidence in their knowledge and skills to prevent long-term health problems from work has dropped since 2019 (down 3 points). Transport workers' confidence has dropped across each of these four measures.

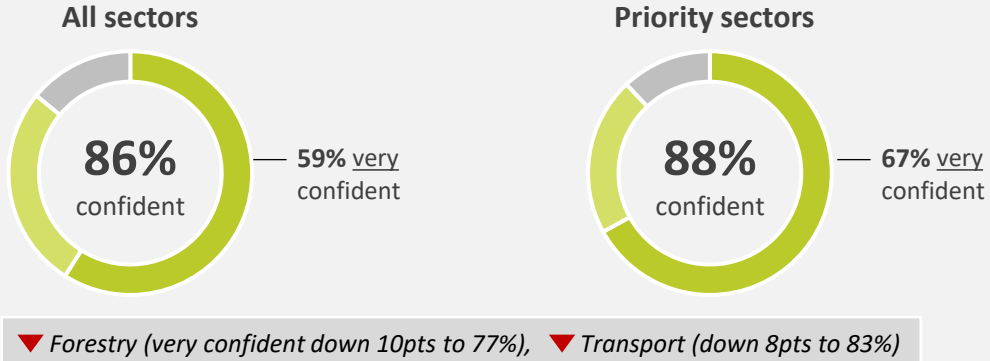
Confidence in having the knowledge and skills to keep safe at work



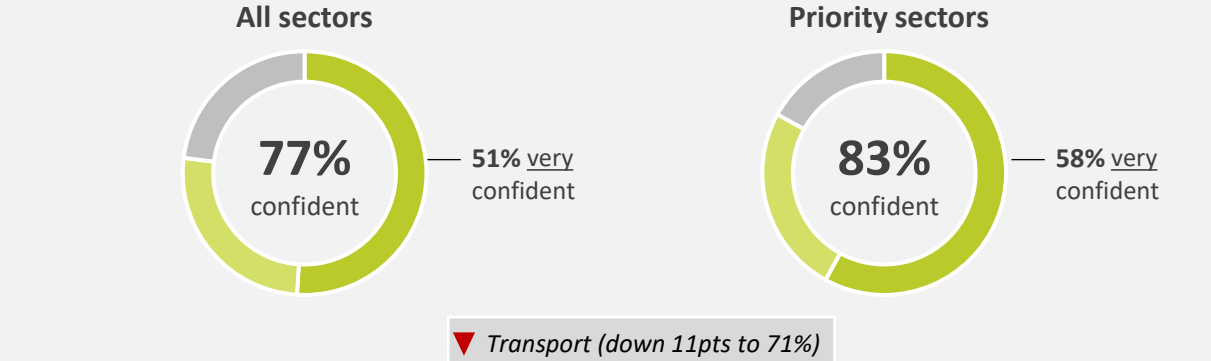
Confidence in having the knowledge and skills to make sure you don't get long-term health problems from your work



Confidence to speak up, or say no, if you're asked to do something that's risky



Confidence that your boss would totally support you if you suggested stopping work because of a potential hazard*

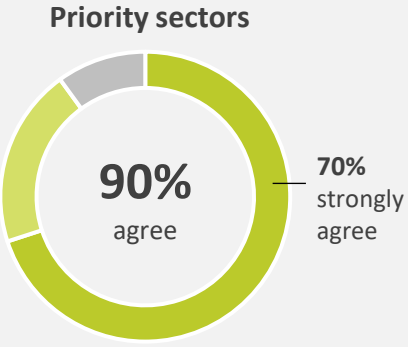
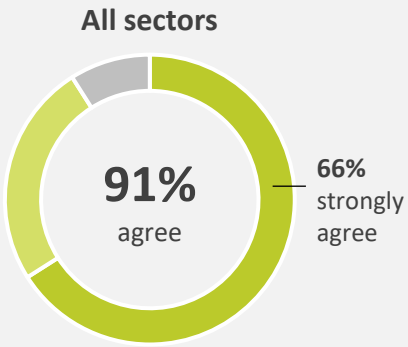


Base: All workers in 2021 (2,575-3,627); Workers in priority sectors – Agriculture, Forestry, Manufacturing, Construction (1,174-1,704). *Excludes self-employed.

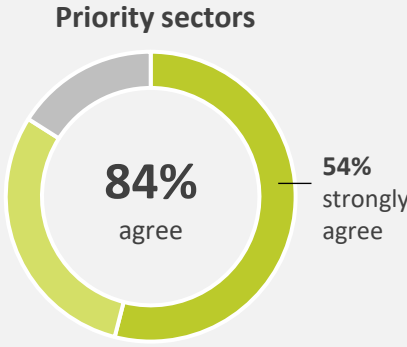
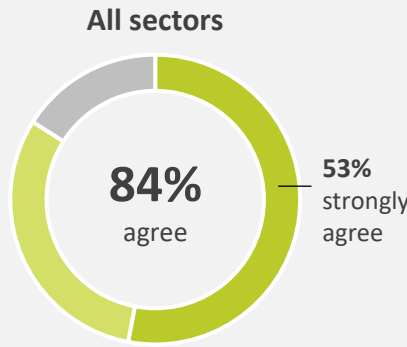
▼ Statistically significant decrease since 2019 (at the 95% confidence level)

Worker attitudes towards taking personal responsibility and doing the right thing have remained constant.

I accept responsibility for my actions at work, even when I make a mistake



Always sticking to the health and safety guidelines is the right thing to do



Base: All workers in 2021 (3,627); Workers in priority sectors – Agriculture, Forestry, Manufacturing, Construction (1,704).
Note, results to the second statement exclude CATI interviews and are therefore based on smaller base sizes (2,869 and 1,316 respectively).

**A capable and
educated
workforce:
employers**



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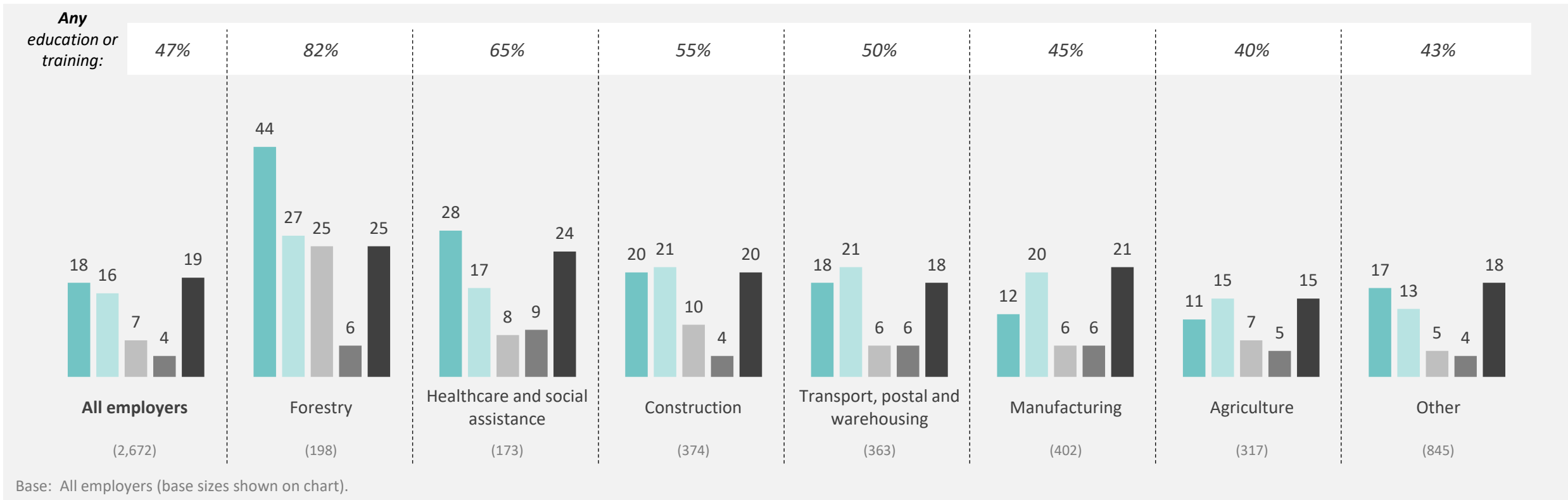
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Just under half of employers (47%) received education or training on H&S* in the last 12 months, although this rises markedly with business size and is especially prevalent in the Forestry sector.

TYPES OF TRAINING/EDUCATION EMPLOYERS HAVE RECEIVED IN LAST 12 MONTHS

%

*Training/education rises markedly with business size (from 41% for up to 5 employees to 86% for 100+ employees).
Training/education is highest in Care for others cultures (68%, vs 49% for Protect me and mine, 47% for All talk, little walk, and 24% for It's just common sense).*



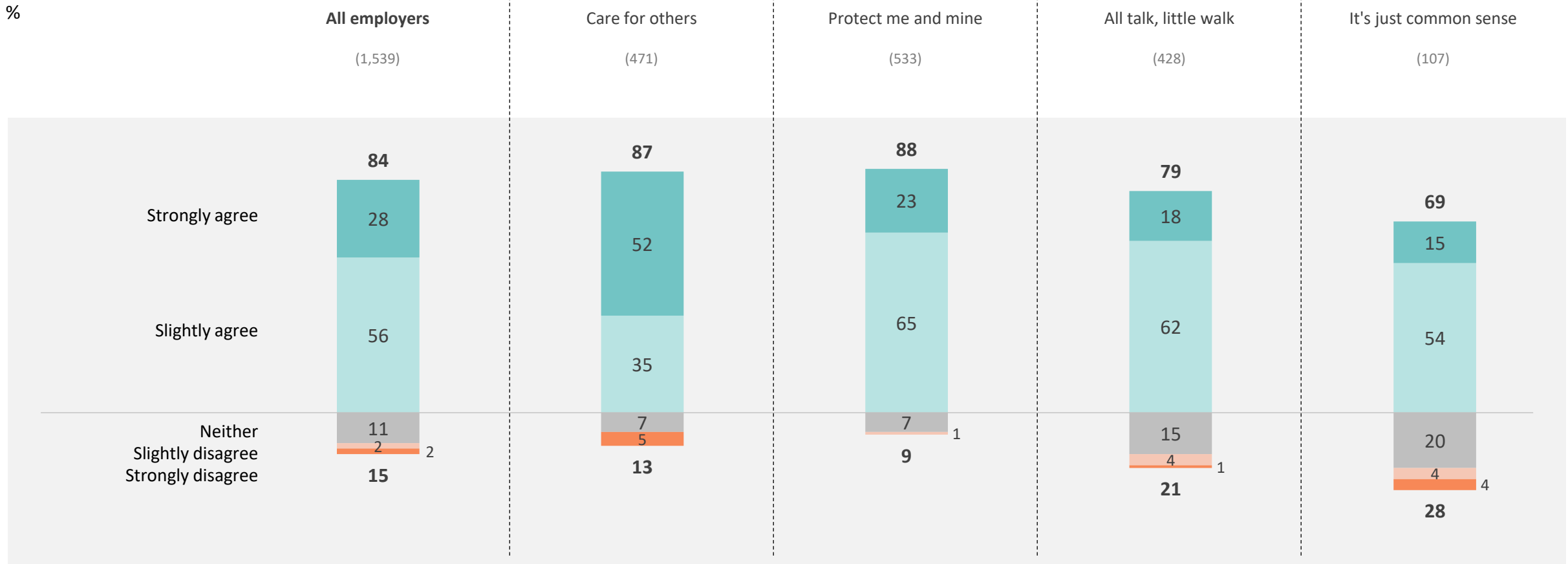
Base: All employers (base sizes shown on chart).

- Course or module done as part of continuing professional development
- Another training course or module
- Study towards a qualification
- Formal mentoring programme
- Another type of education or training

*Education and training was defined as that which supported the employer to manage the health and safety risks in their business – even if the education or training was not just about health and safety.

Most (84%) employers who received education and training found it to be useful and relevant to their work. This equates to 40% of all employers. The two immature safety cultures are less likely to have had useful and relevant training.

RATINGS OF EDUCATION/TRAINING – USEFUL AND RELEVANT TO YOUR WORK

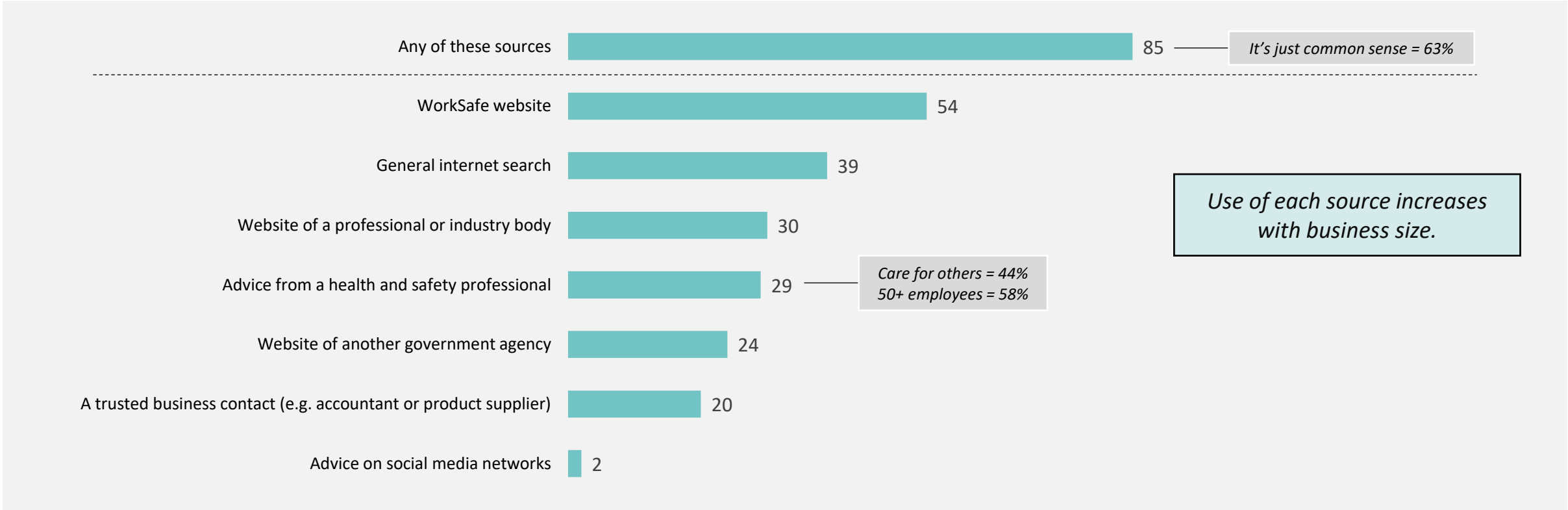


Base: All employers (base sizes shown on chart).

Most employers (85%) have sought information and guidance on H&S in the last 12 months, largely from online sources. Around three in ten (29%) sought advice from a H&S professional.

SOURCES OF HEALTH AND SAFETY INFORMATION AND GUIDANCE USED IN LAST 12 MONTHS

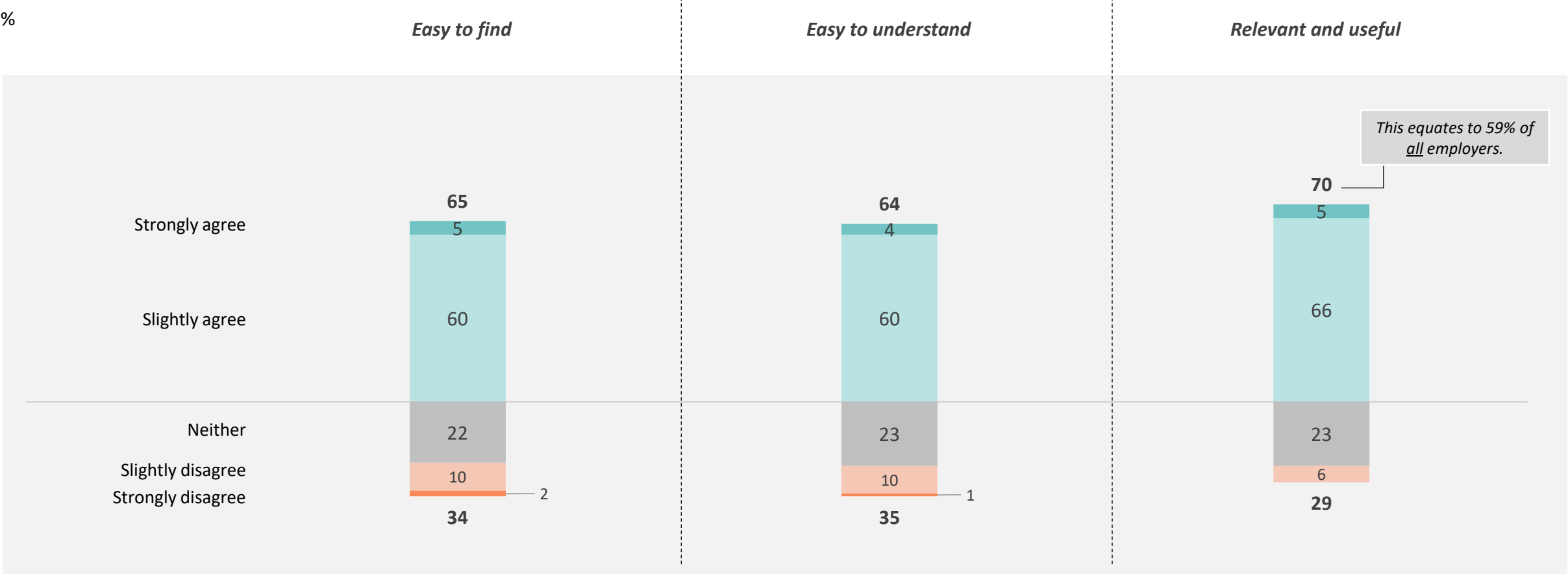
%



Base: All employers (2,672)

Employers don't find information and guidance on H&S especially easy to find, understand, relevant or useful. Very few strongly agreed the information and guidance fitted these descriptions.

EMPLOYER RATINGS OF INFORMATION AND GUIDANCE

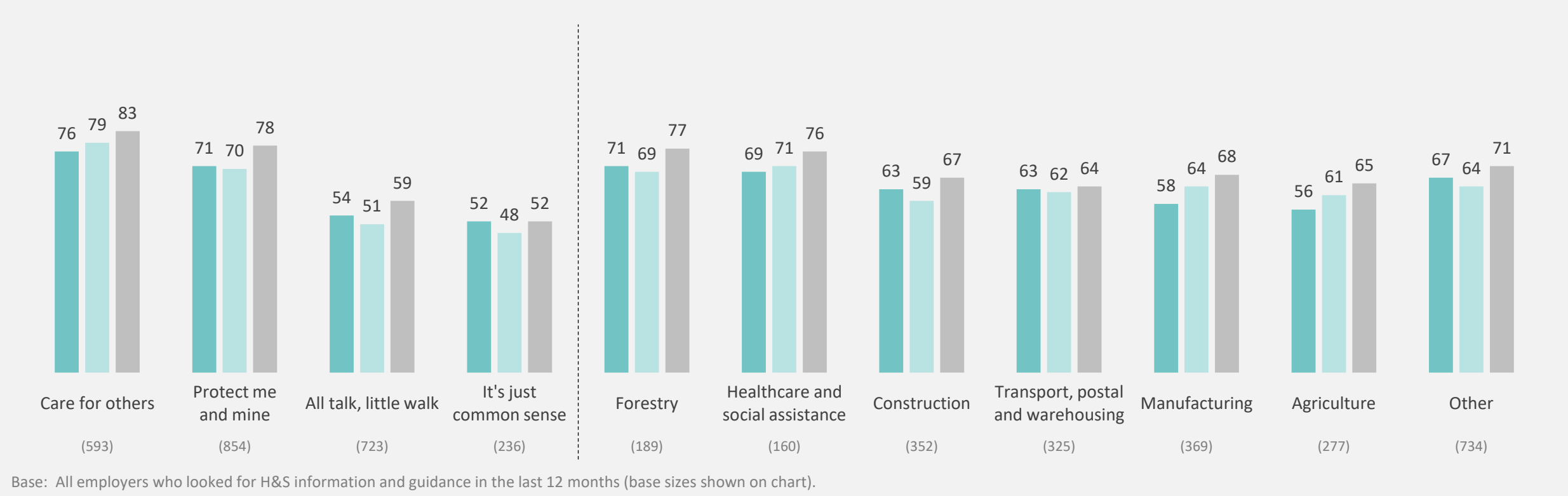


Base: All employers who sought information/guidance in the last 12 months (2,406)

Employer perceptions of the information and guidance are more favourable in mature safety cultures. Variations exist across industry sectors; for example, employer ratings are lower in Construction for ease of understanding and in Agriculture for being easy to find.

EMPLOYER RATINGS OF INFORMATION AND GUIDANCE BY INDUSTRY AND SEGMENT

% agree



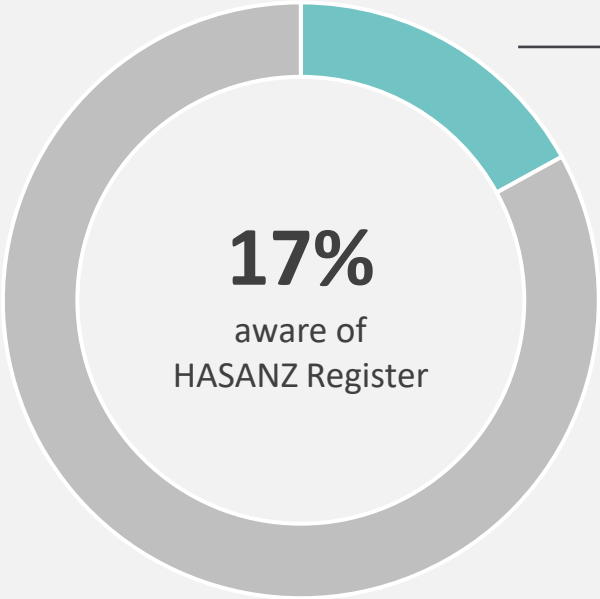
Base: All employers who looked for H&S information and guidance in the last 12 months (base sizes shown on chart).

■ Easy to find ■ Easy to understand ■ Relevant and useful

Fewer than one in five (17%) employers are aware of the HASANZ Register. 7% of employers who are aware of it have contacted a professional found on the Register. This equates to 1% of all employers.

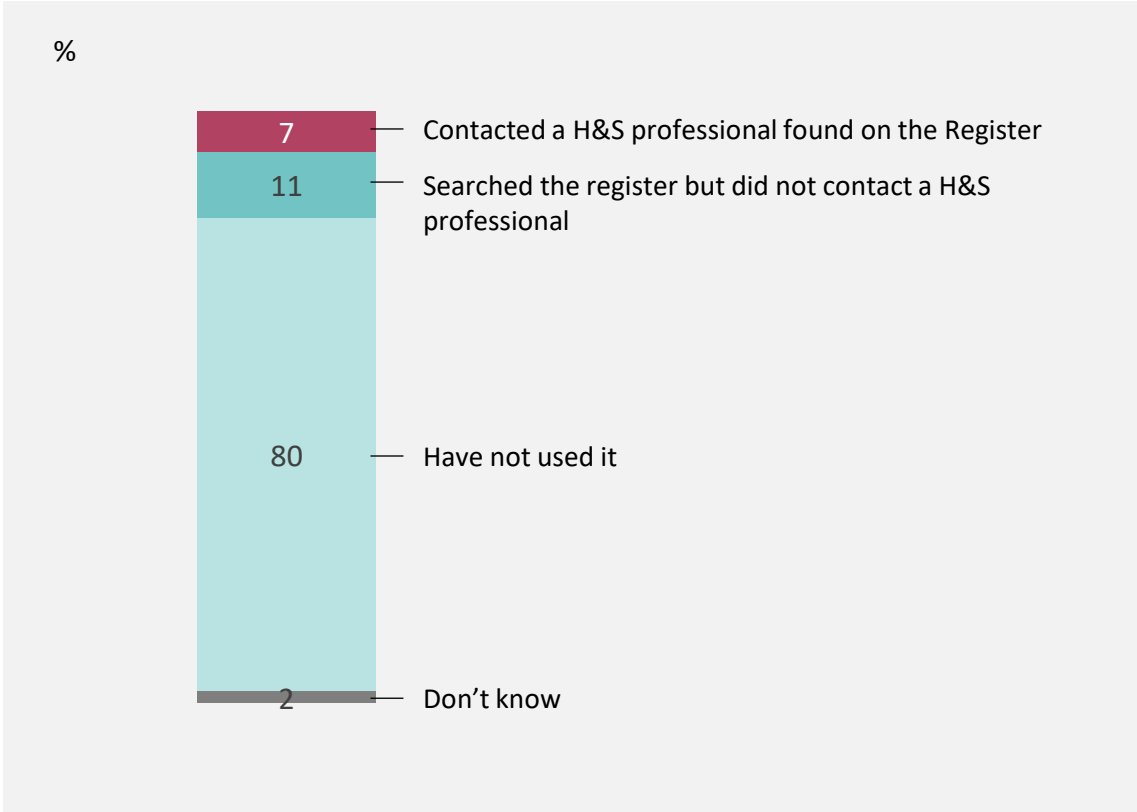
AWARENESS AND USE OF HASANZ REGISTER

Awareness



Base: All employers (2,672)
Source: Q24c

Use of Register (based on those aware of it)



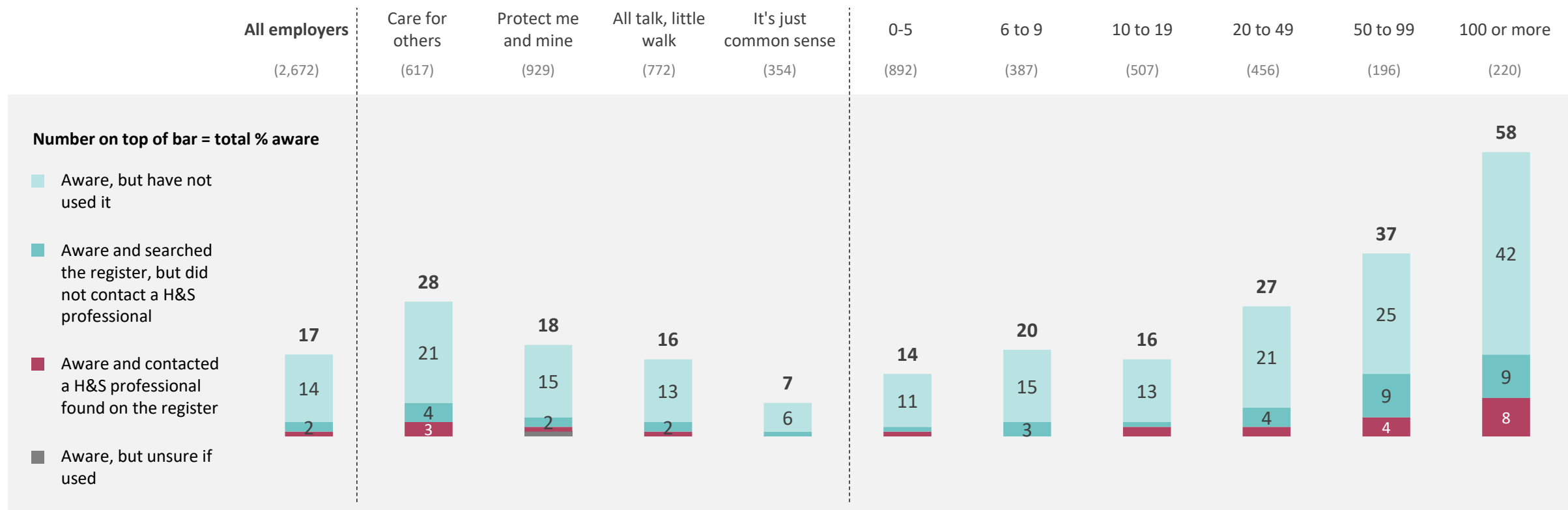
Base: Aware of HASANZ register (711)
Source: Q24d

Awareness and use of the HASANZ Register climbs steeply with employer size. Over half (58%) of large employers (100+ employees) are aware of the Register and 8% have used it to source a professional.

AWARENESS AND USE OF HASANZ REGISTER

%

Awareness of HASANZ is highest in Forestry (28%) and Manufacturing (27%) and lowest in Agriculture (15%), Construction (18%) and Transport (18%).



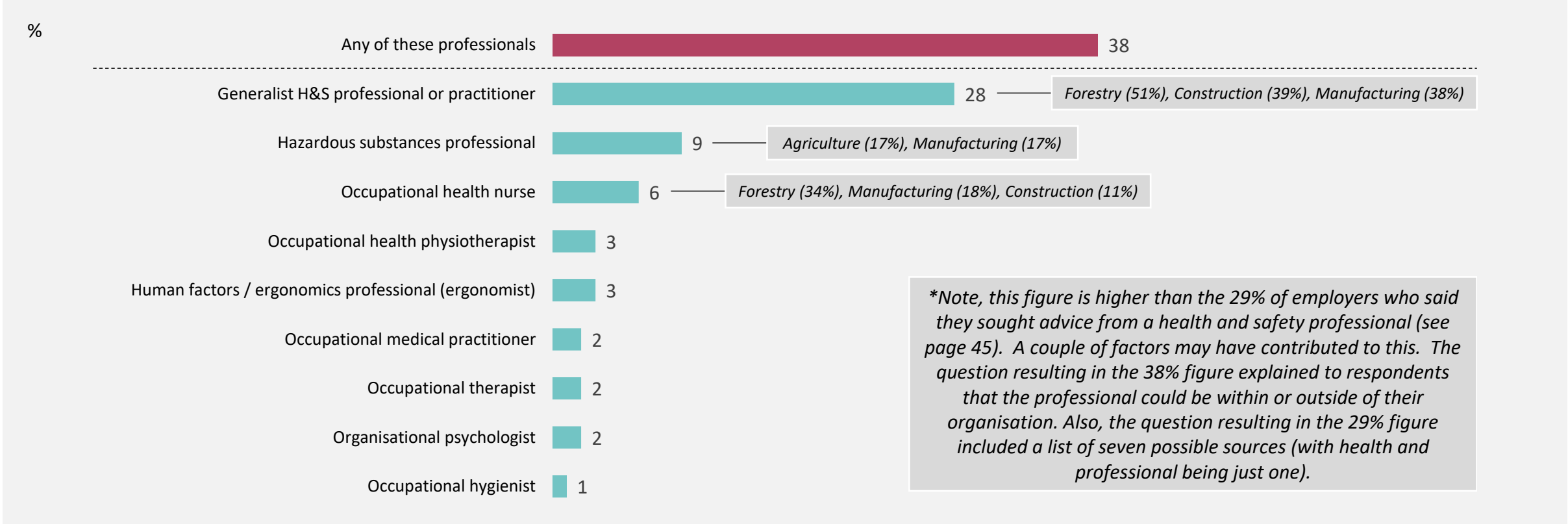
Base: All employers (base sizes shown on chart).

Workplace culture

Business size

Over a third (38%* of employers) sought internal or external advice or services from a H&S professional in the last 12 months, most commonly a generalist H&S practitioner.

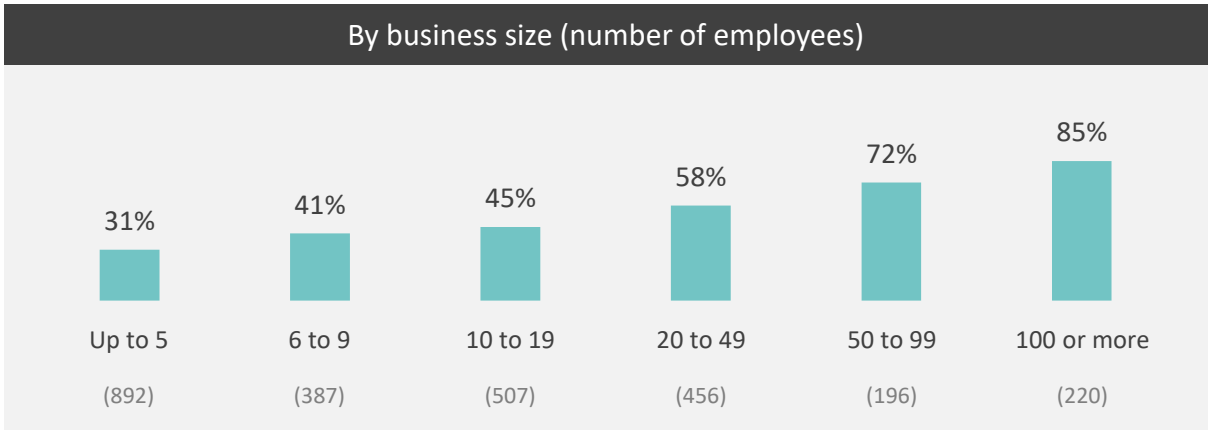
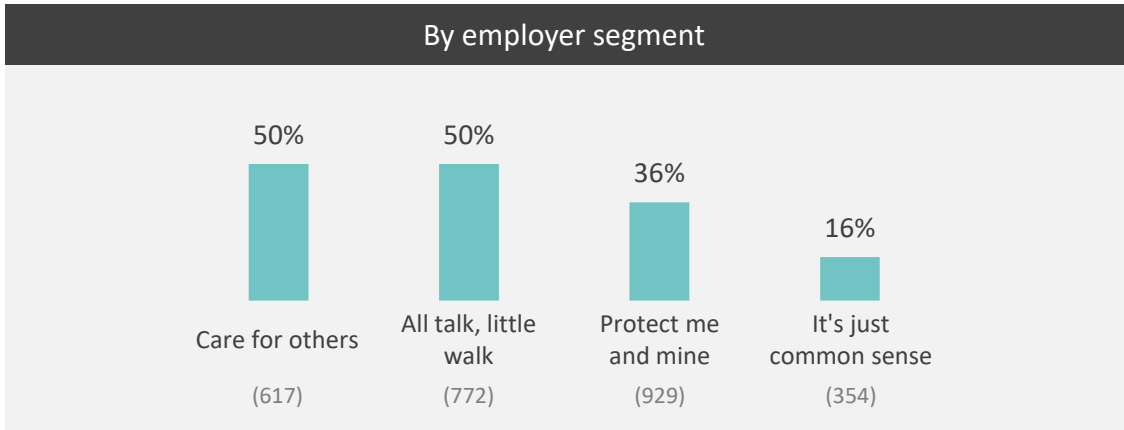
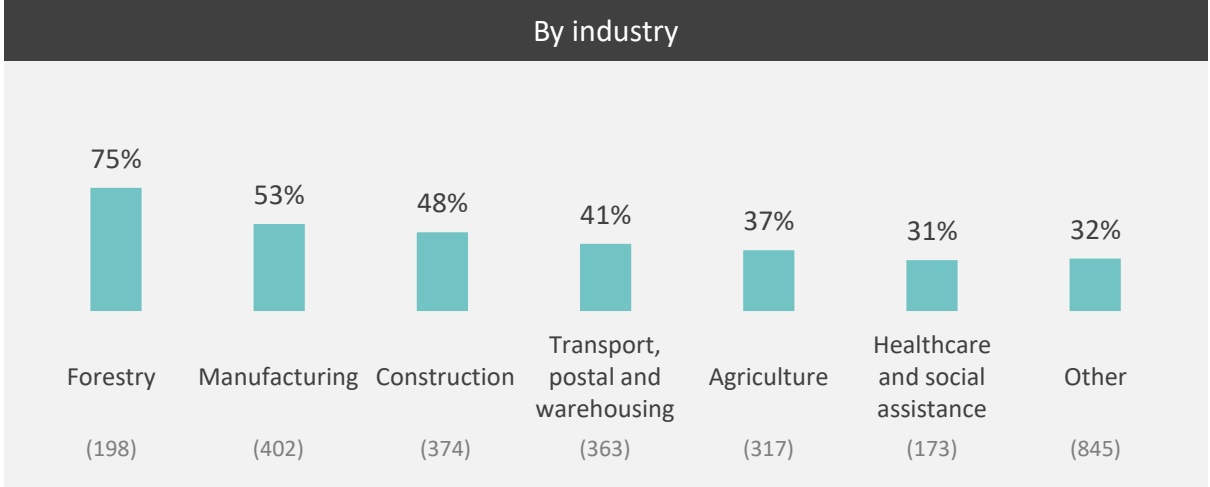
PROFESSIONAL SOURCES OF ADVICE / SERVICES USED IN LAST 12 MONTHS



**Note, this figure is higher than the 29% of employers who said they sought advice from a health and safety professional (see page 45). A couple of factors may have contributed to this. The question resulting in the 38% figure explained to respondents that the professional could be within or outside of their organisation. Also, the question resulting in the 29% figure included a list of seven possible sources (with health and professional being just one).*

Base: All employers (2,672)

Seeking professional advice or services is most commonly reported by larger employers (Care for others and All talk, little walk) and in the Forestry, Manufacturing, and Construction sectors.



Base: All employers (2,672), subgroup base sizes shown on chart.

**Empowering
workers to be
partners in health
and safety**



KANTAR PUBLIC



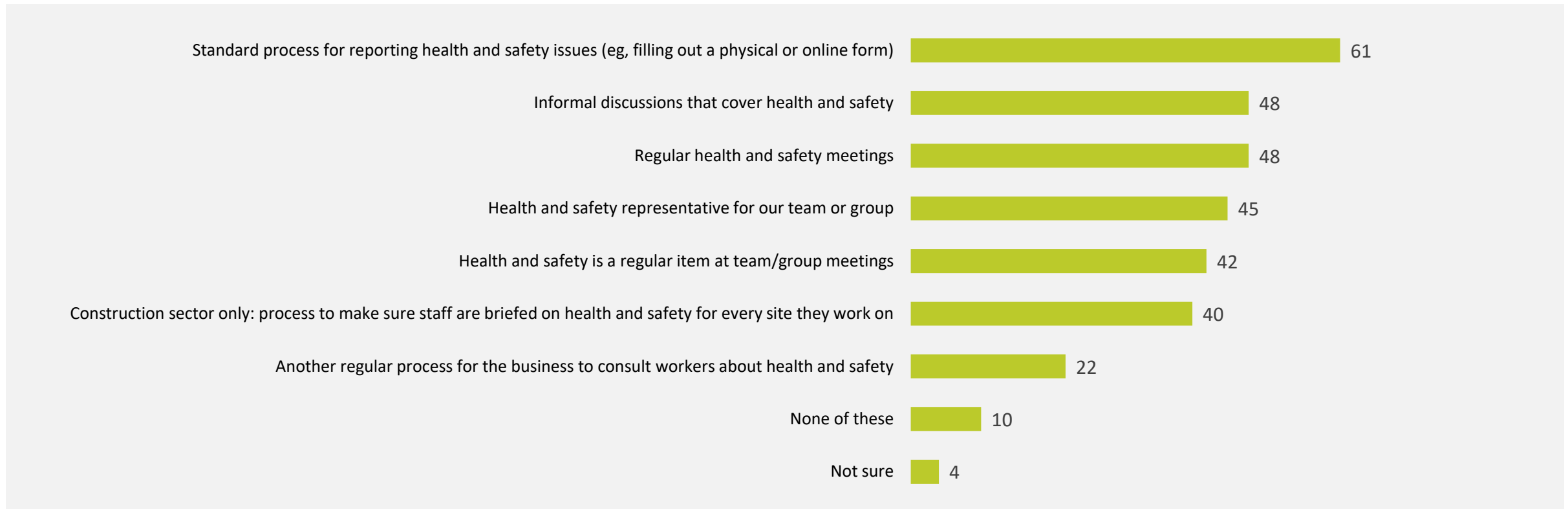
WORKSAFE
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AOTEAROA

Around six in ten workers are aware of a standard process for reporting health and safety issues in their workplace, and less than half report that their team or group has a health and safety representative.

FORMAL WORKER ENGAGEMENT PRACTICES

%

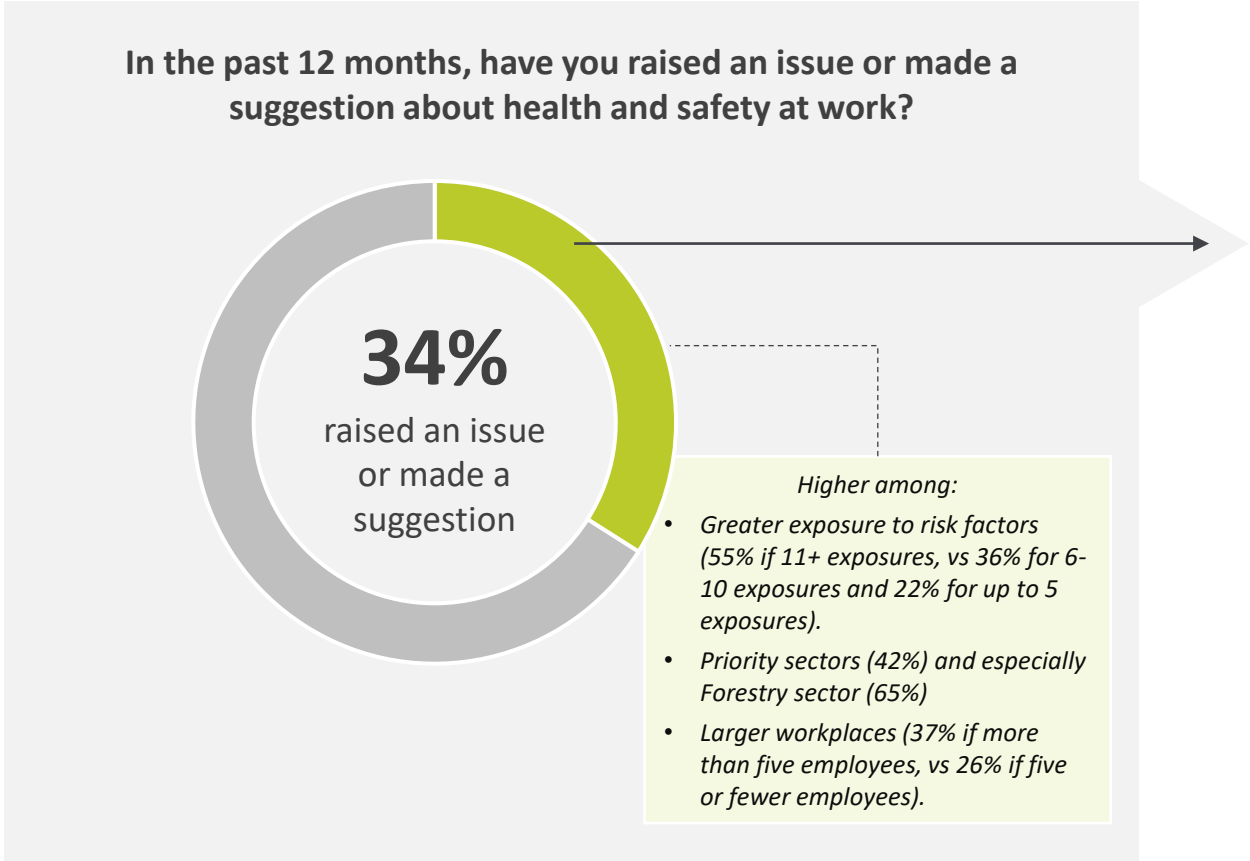
Each of these engagement practices are more common in larger workplaces. Also, Forestry sector workers are most likely to be in workplaces with these practices, whereas Agriculture are least likely.



Base: All workers (3,627), Construction sector workers (427)

Of the one third (34%) of workers who raised an issue or made a suggestion to their employer about H&S in the last 12 months, 60% report that changes were made as a result and 68% received feedback on how the issue was dealt with.

WORKERS RAISING ISSUES OR MAKING SUGGESTIONS



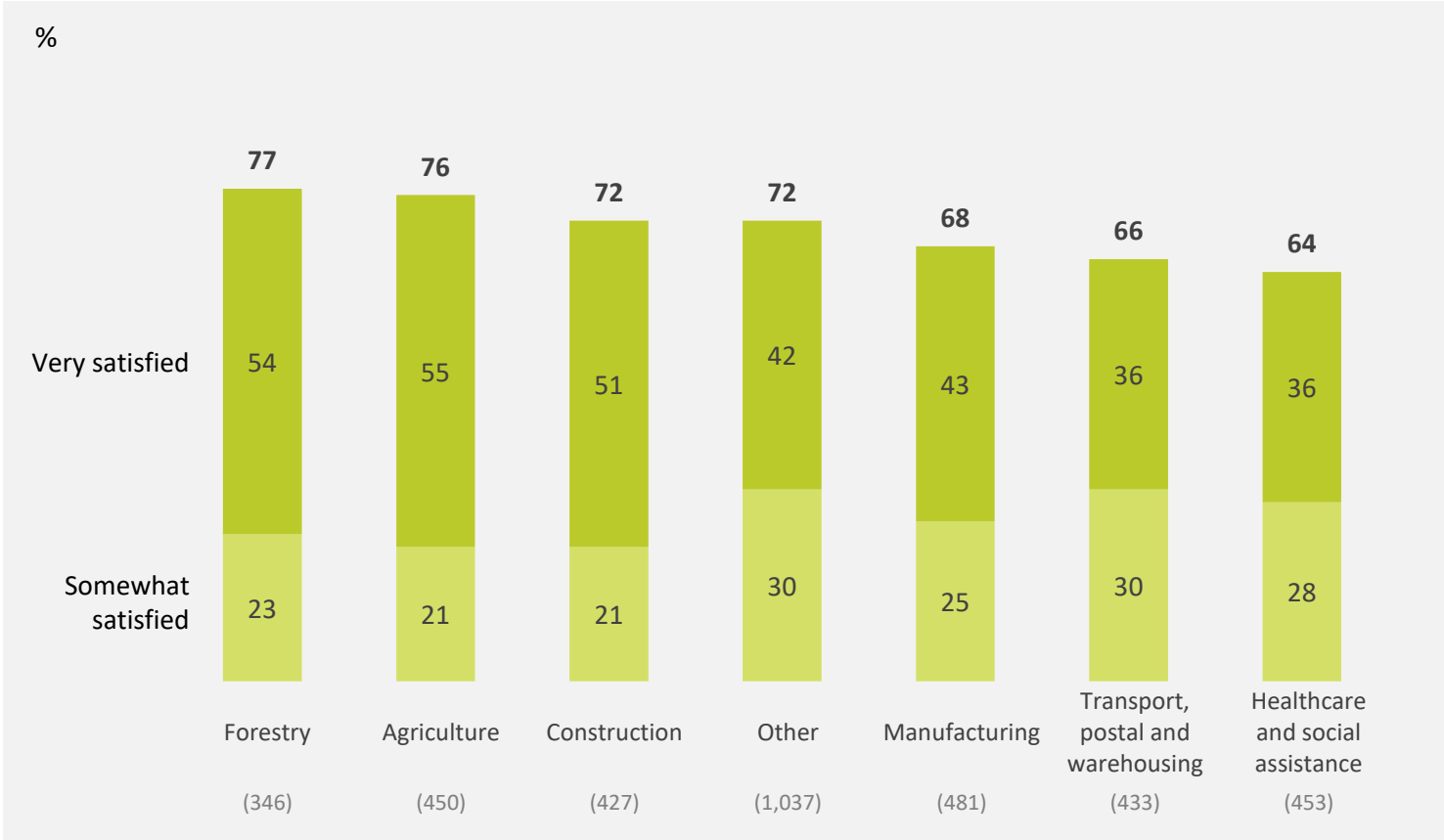
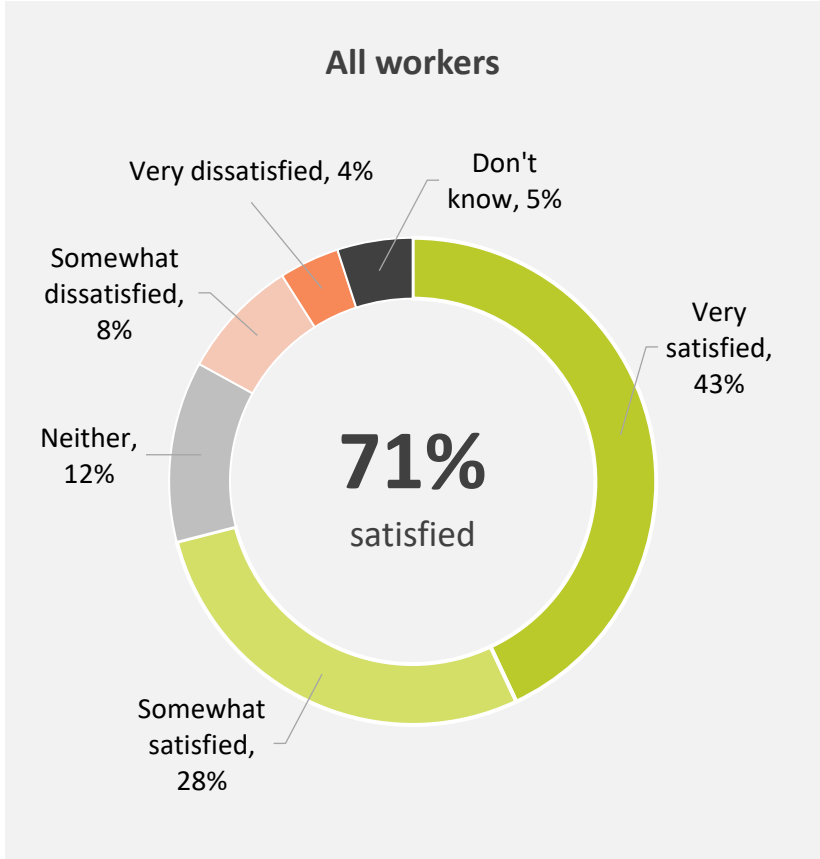
Base: All workers excluding (2,672). Excludes CATI respondents as these questions were not asked in the CATI interviews due to interview length.



Base: All workers who raised an issue or made a suggestion in the past 12 months (1,161).

Seven in ten (71%) workers are satisfied with how their employer deals with H&S issues that workers raise. Satisfaction is lowest in Healthcare, Transport, and Manufacturing.

WORKER SATISFACTION WITH THE WAY EMPLOYER DEALS WITH THE HEALTH AND SAFETY ISSUES WORKERS RAISE

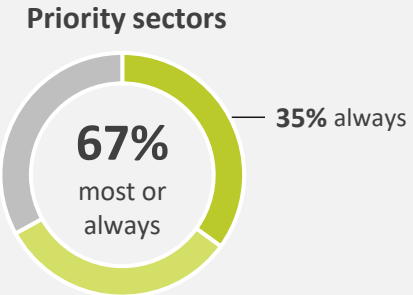
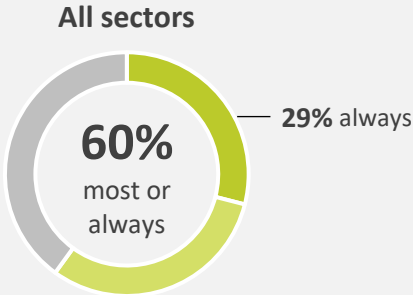


Base: Workers.

There is a perception gap between employers and workers when it comes to health and safety risks being discussed in an open and helpful way, with employers viewing it in a more positive light.

HEALTH AND SAFETY RISKS ARE DISCUSSED IN AN OPEN AND HELPFUL WAY

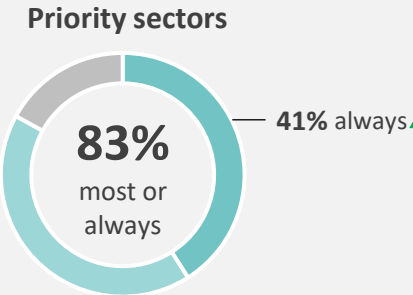
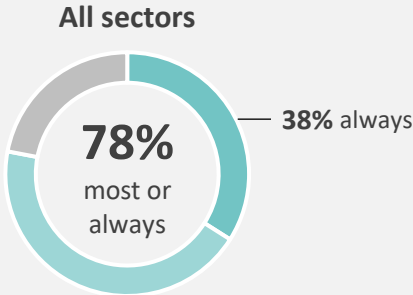
Workers



▼Transport (down 10pts to 59%), ▼ Forestry (down 11pts to 76%)

Base: All workers (3,627), workers in priority sectors – Agriculture, Forestry, Construction, Manufacturing (1,704)

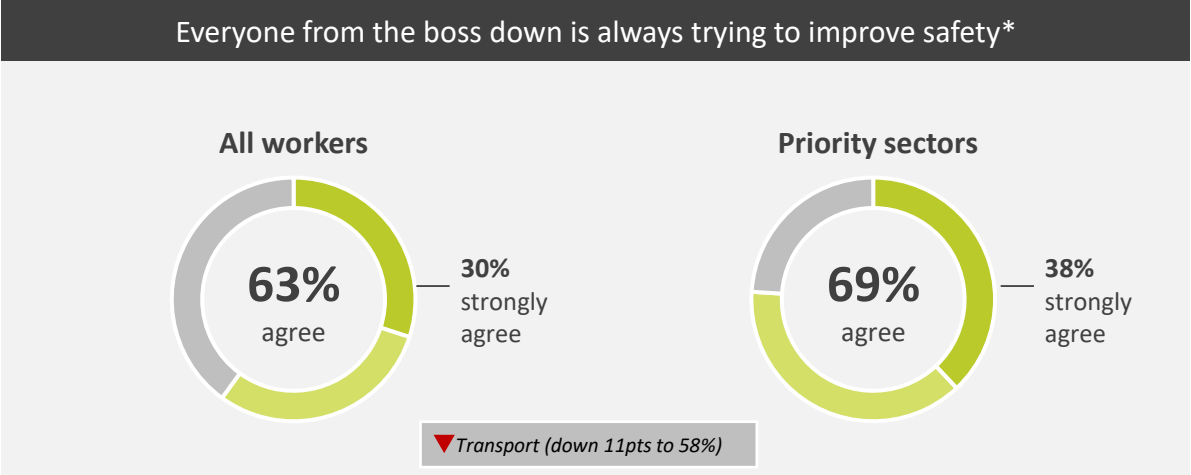
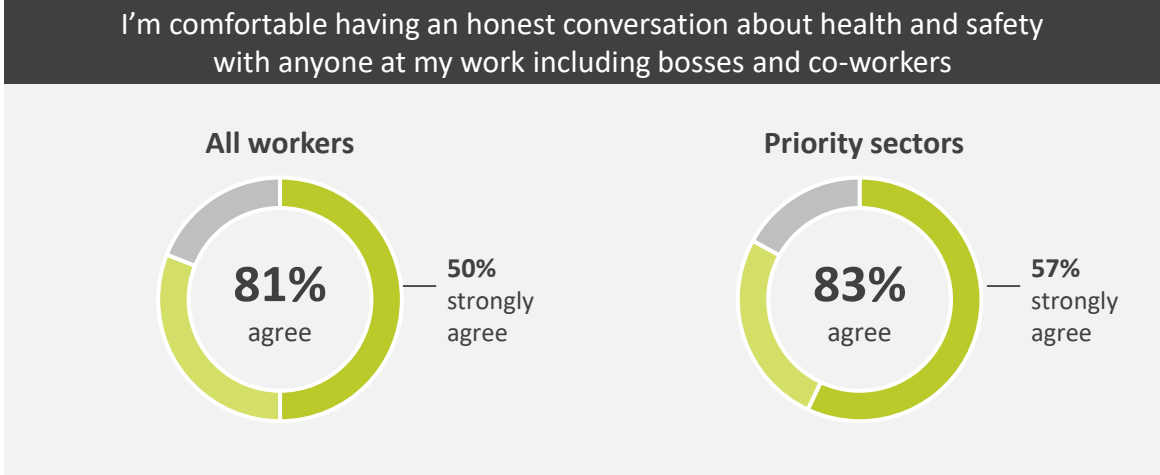
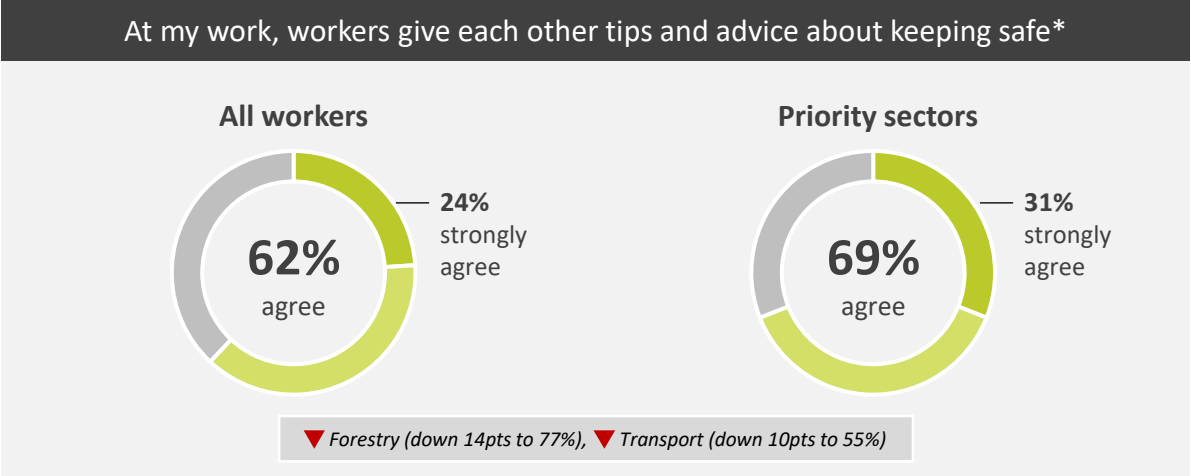
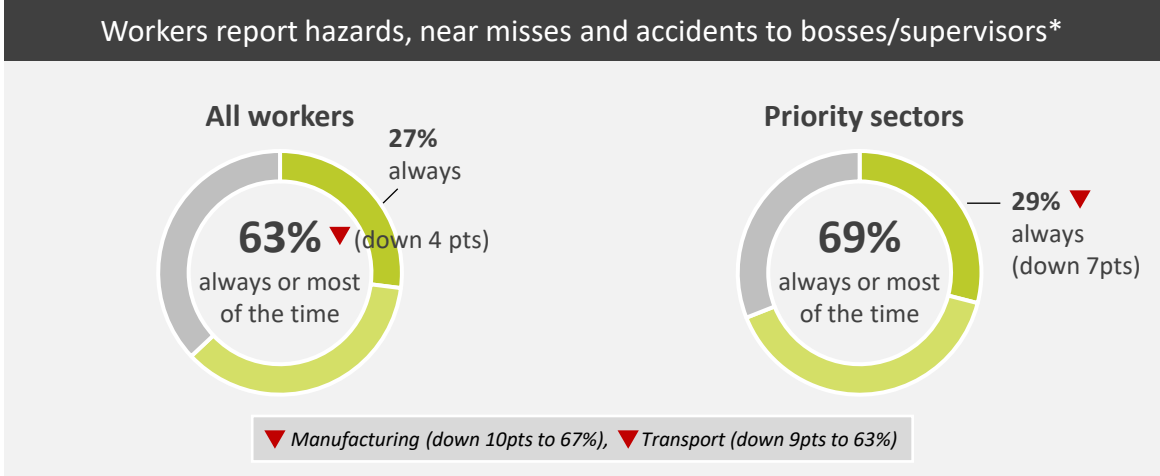
Employers



▲ Forestry (up 7pts to 98% for most or always), Construction (up 7pts to 92% for at least half the time)

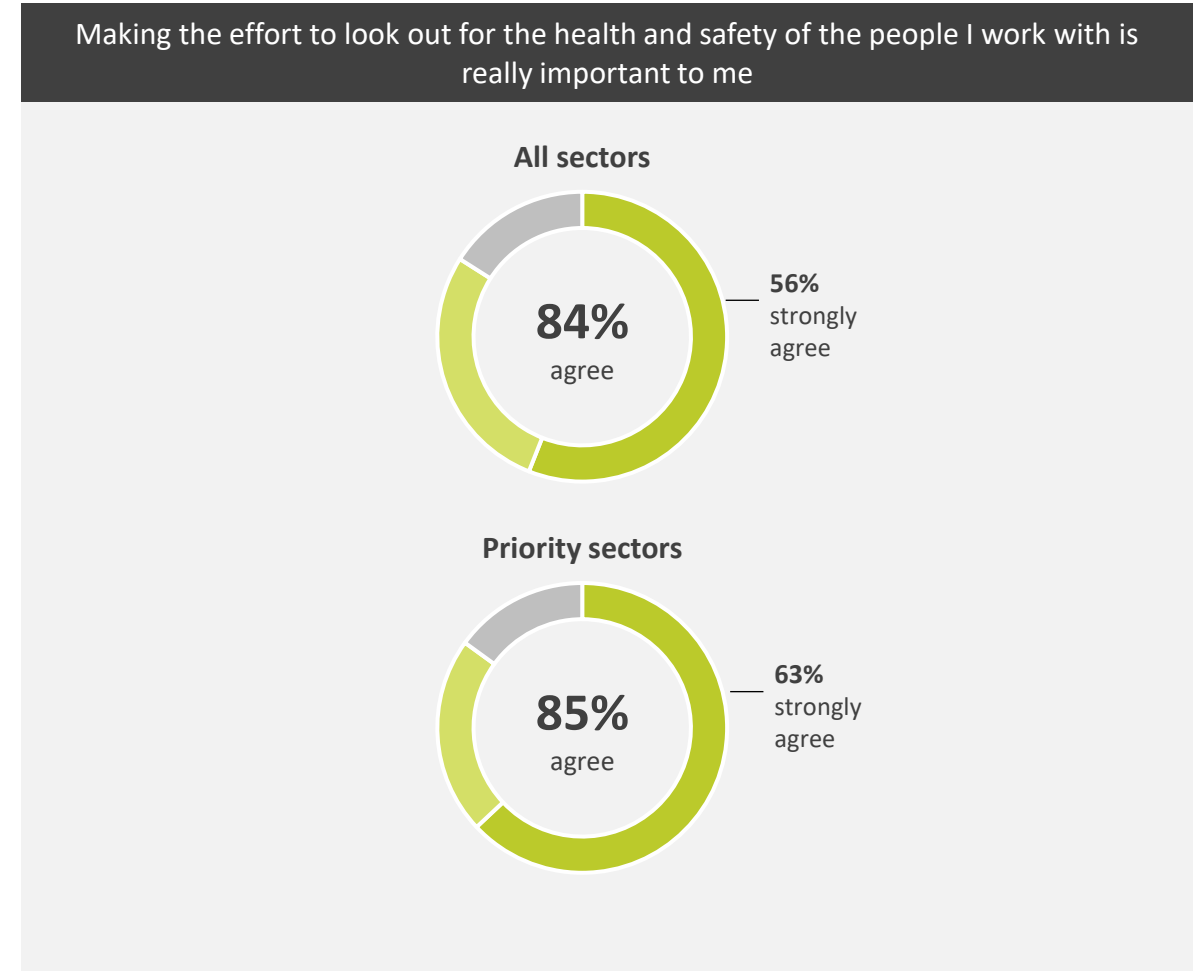
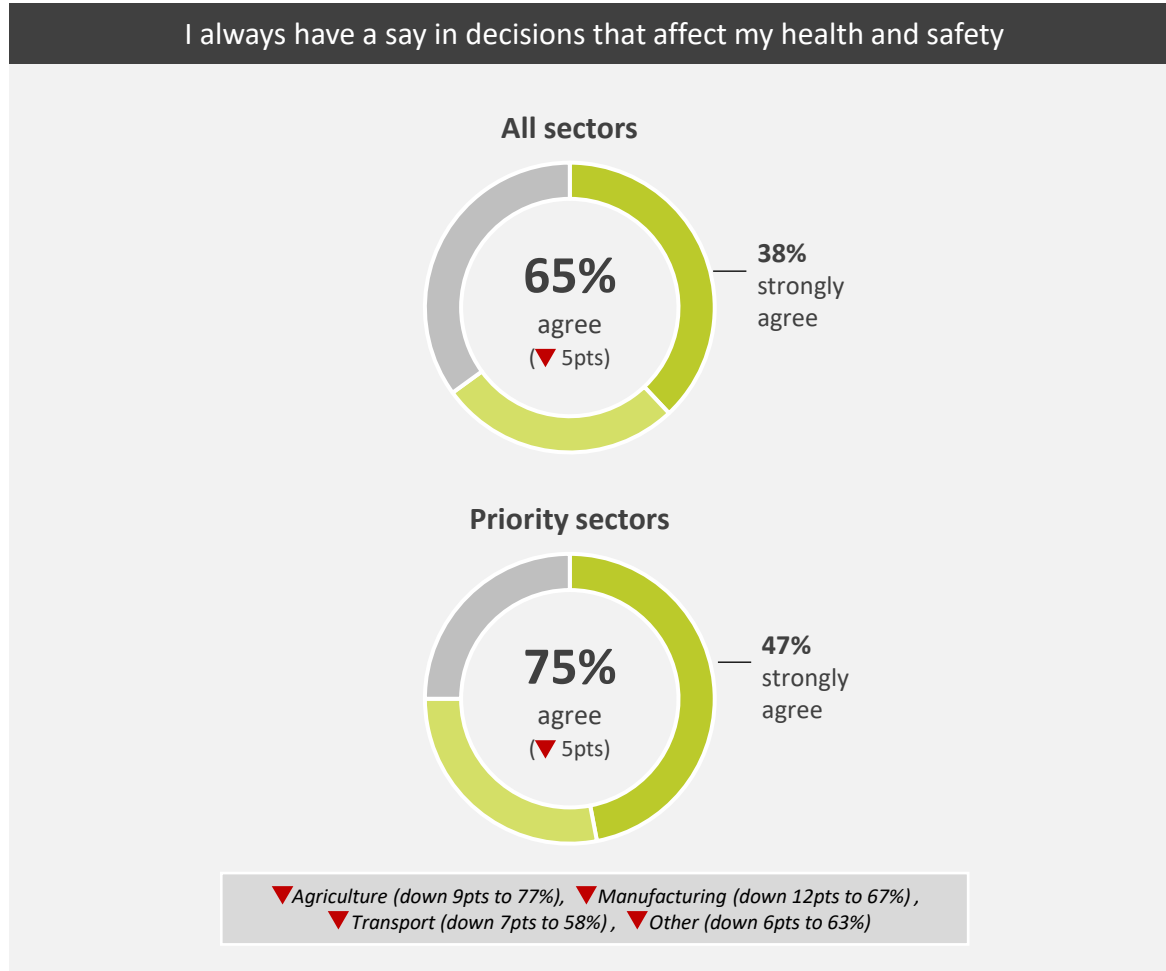
Base: All employers (2,672); Employers in priority sectors – Agriculture, Forestry, Manufacturing, Construction (1,208)

Since 2019, fewer workers report that workers always or mostly report hazards, near misses and accidents (down 7 points among priority sectors).



Base: All workers in 2021 (2,575-3,627); Workers in priority sectors – Agriculture, Forestry, Manufacturing, Construction (1,174-1,704). *Excludes self-employed. ¹ Excludes CATI respondents. ▼ Statistically significant decrease since 2019 (at 95% confidence level)

Since 2019, fewer workers believe they always 'have a say' in decisions that affect their health and safety (down 5 points).

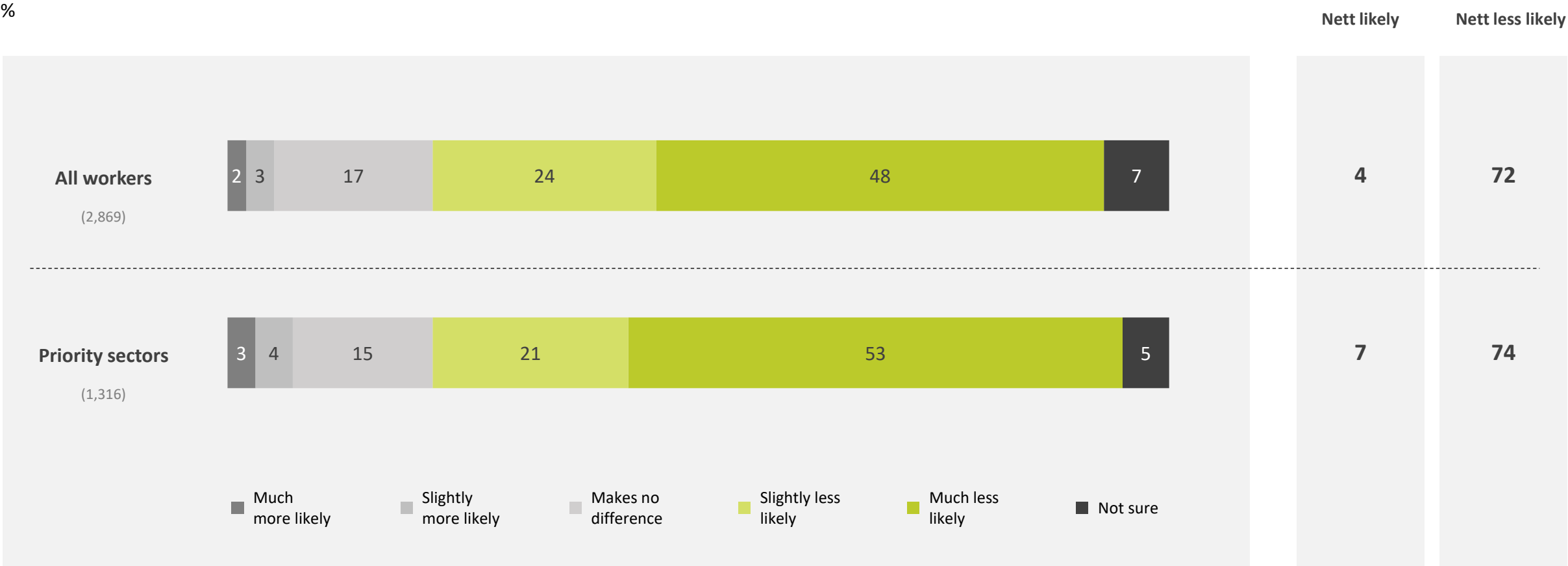


Base: All workers in 2021 (3,179-3,627); Workers in priority sectors – Agriculture, Forestry, Manufacturing, Construction (1,440-1,704). Excludes self-employed.

▼ Statistically significant decrease since 2019 (at 95% confidence level)

Consistent with 2019, around three quarters of workers believe following all H&S guidelines will reduce the chance they are harmed.

PERCEIVED LIKELIHOOD OF BEING INJURED / HARMED IF FOLLOW ALL HEALTH AND SAFETY GUIDELINES



Base: Workers.

Work-related harm



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Defining health problems and physical injuries

The next pages examine self-reported levels of work-related health problems and physical injuries.

Both the prevalence and incidence of health problems is reported:

- **Prevalence** is the % of the population who report experiencing a health problem in the last 12 months that they think has been caused or made worse by work (regardless of when they first experienced the problem).
- **Incidence** is the % of the population who report that they **first started** experiencing a health problem in the last 12 months that they think has been caused or made worse by their work.

The incidence of physical injuries is reported, i.e. physical injuries that occurred in the last 12 months needing medical attention or time off work.

Health problems were defined as follows:

Musculoskeletal harm was defined as discomfort, pain, numbness or loss of mobility in muscles, bones, or joints.

- Respondents were then asked what parts of their bodies had been affected: hips, legs, feet or knees; hands, arms, shoulders, or neck, back; or face.

Mental health or wellbeing issue.

- Respondents who indicated they had experienced a mental health or wellbeing issue were further asked whether they had experienced depression (low mood), anxiety (worries and fears), persistent headaches or stomach aches, persistent tiredness or problems sleeping, persistent difficulty concentrating, remembering or making decisions, or another mental health issue.

Dermatitis, eczema, or another skin condition.

Hearing loss or ringing in ears.

- Respondents were asked to indicate whether this was short-term hearing loss or ringing in their ears from exposure to loud noise, permanent hearing loss or ringing in their ears, or both short-term and permanent.

Infectious disease.

- Respondents who only indicated they had caught the common cold were excluded from this definition.

Breathing or respiratory problem.

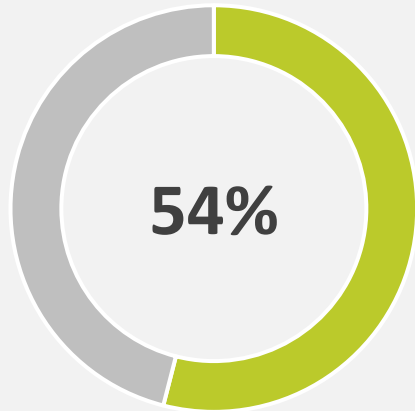
- Respondents were asked to indicate whether this was a short-term breathing problem or irritation from exposure to dust, fumes, smoke, sprays, or other substances at work; asthma; chronic bronchitis or emphysema; another respiratory condition.

Physical injuries were defined as follows:

A sprain or strain, an eye injury; an injury to teeth, gums, or mouth; a broken bone or fracture; an injury from crushing; a deep cut or wound that required stitches; a body part amputated; burns requiring medical attention; unconsciousness as a result of physical injury or lack of oxygen, a serious head injury and/or concussion, a blow to another body part requiring medical attention; electrocution; or another type of physical harm or injury.

Just over half of workers report experiencing some kind of work-related harm in the last 12 months, and more than a quarter took time off work because of work related harm.

TIME TAKEN OFF FOR SELF-REPORTED WORK-RELATED HARM IN THE LAST 12 MONTHS

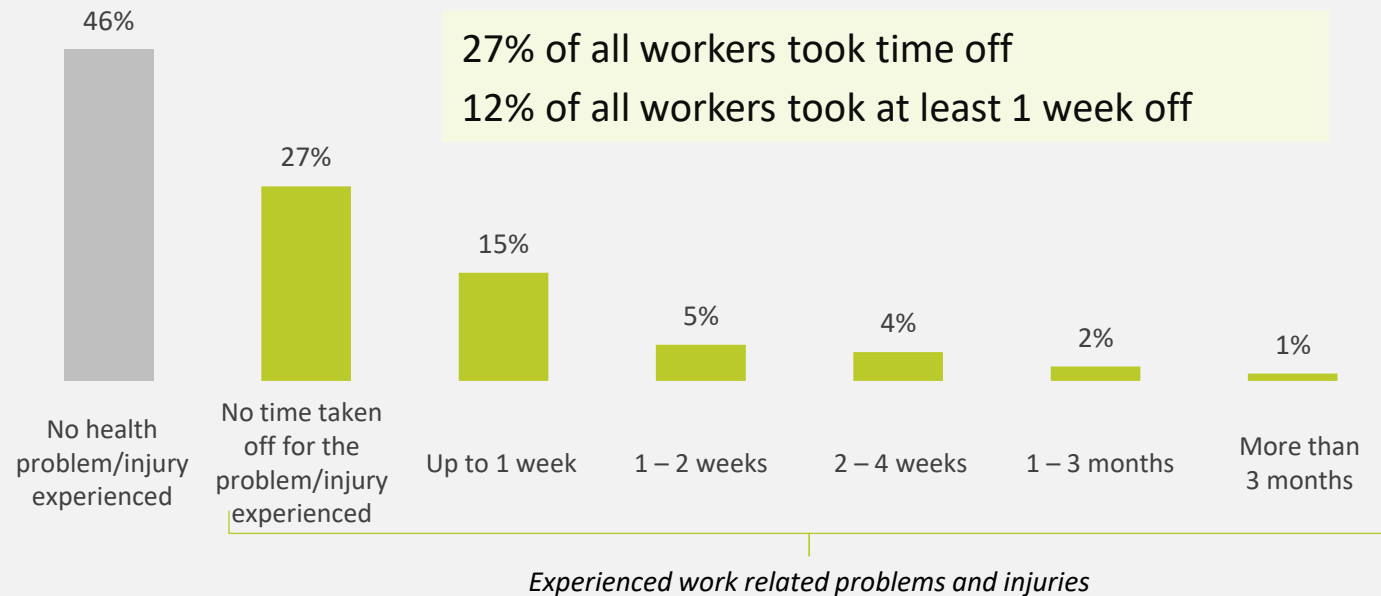


...of workers report that in the last 12 months they experienced a physical injury that required medical attention or time off work, or a work-related health problem*.

*This work-related health problem may have first been experienced or got worse in the last 12 months or earlier than this.

Base: All workers (3,627)

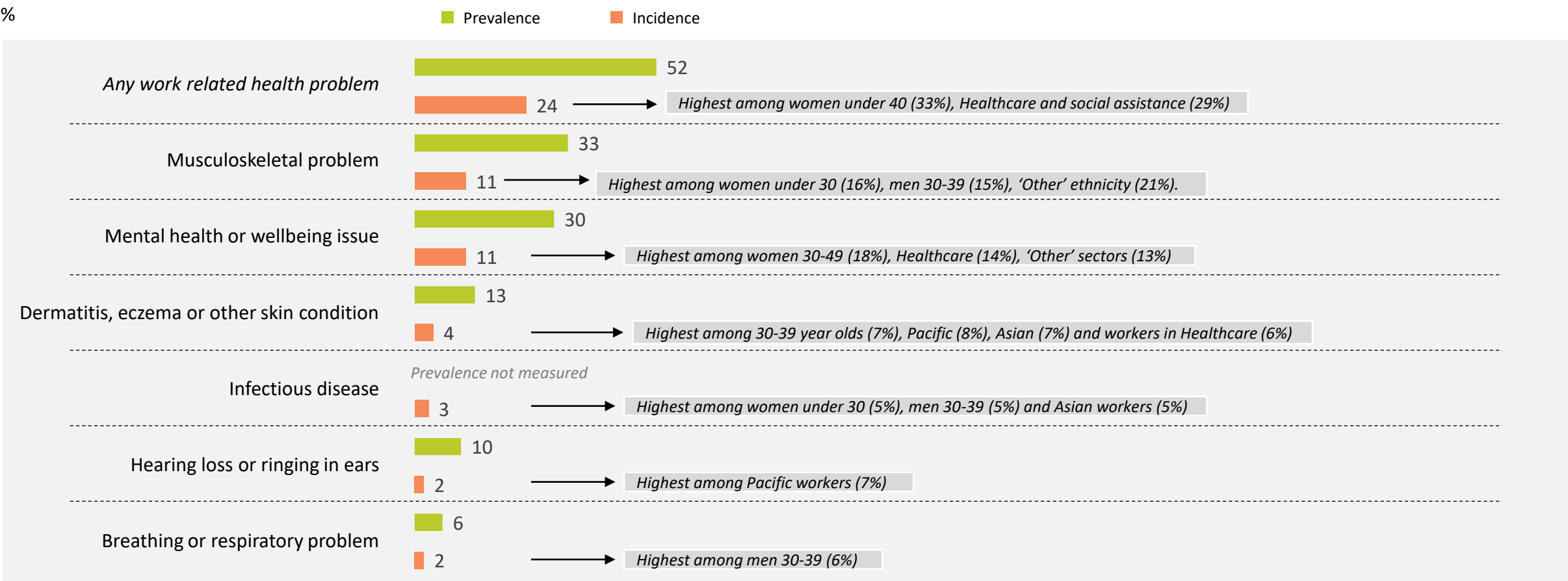
Time off work because of work related health problems and injuries in the past 12 months



Base: All workers (3,627)

Proportions of around one in ten workers report experiencing new musculoskeletal problems, and mental health or wellbeing issues, in the last 12 months.

PREVALENCE AND INCIDENCE OF SELF-REPORTED WORK-RELATED HEALTH PROBLEMS IN LAST 12 MONTHS



Base: All workers (3,627)

Around one in ten workers report a physical injury in the last 12 months that needed medical attention or time off work.

INCIDENCE OF SELF-REPORTED WORK-RELATED PHYSICAL INJURIES IN LAST 12 MONTHS



11% ...of workers reported experiencing some kind of **physical injury** or harm at work (or while working) that required medical attention or resulted time off work (in the last 12 months)

- Higher among:*
- Lower socio-economic group (20%)
 - Agriculture (19%)
 - Forestry (17%)
 - Construction (17%)

Physical injuries included a sprain or strain (5%), an eye injury (0.3%); an injury to their teeth, gums, or mouth (0.2%); a broken bone or fracture (1%); an injury from crushing (0.6%); a deep cut or wound that required stitches (1%); a body part amputated (0.1%); burns requiring medical attention (0.3%); unconsciousness as a result of physical injury or lack of oxygen (0.1%), a serious head injury and/or concussion (0.5%), a blow to another body part requiring medical attention (0.8%); electrocution (0%); or another type of physical harm or injury (2.8%).

Base: All workers (3,627)

Supporting worker engagement



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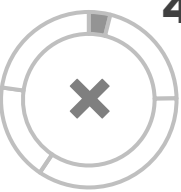



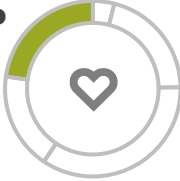


WORKSAFE
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Almost everyone believes health and safety at work is important – it's human nature to want to be safe and well. But it's also a natural human response to be influenced by the cultural and social norms that exist in different workplace settings.

We're also influenced by our past experiences, hold different beliefs and thresholds of personal risk, and face different job demands across and within industries. For these reasons, we have **different capabilities** to engage with health and safety at work. In 2019, we developed a **segmentation of worker engagement** with health and safety. We have updated the size and profiles of these segments using the 2021 survey data.

These are the five worker engagement segments established in our 2019 research and replicated in 2021.

DENIAL	FOLLOWERS	FLUSTERED	ATTAINERS	ADVOCATES
 <p>4%</p>	 <p>21%</p>	 <p>35%</p>	 <p>18%</p>	 <p>23%</p>
<ul style="list-style-type: none"> - Don't acknowledge H&S should be taken seriously - Low awareness of hazards - Barely contemplate risks; pretty laid back - Rules and procedures there for other reasons than safety (e.g. appearance) - Unlikely to notice a safe or unsafe work culture – it's just the way things are done 	<ul style="list-style-type: none"> - Desire to be safe, but strongly influenced by work environment/culture (positively and negatively) - May have had a negative experience trying to be safe (so gave up) - May experience low self-efficacy (lack confidence to speak up/conflict avoidance) - Can be accepting of the rules, but they must be there for a reason 	<ul style="list-style-type: none"> - Conflicted in their behaviour - Rationalise, rationalise, rationalise! - Often seek to take the easy way - Selective in what constitutes H&S - Often take information on face value - 'Getting the job done' can override rules and procedures 	<ul style="list-style-type: none"> - Strongly committed to be safe, but unlikely to seek to influence others - Working safely is the right thing to do - Cautious about risks and seek to protect themselves from harm - Regulations and rules are integral to the way they work - If in doubt, don't do it (or will feel confident to speak up) - Unhappy in unsafe work environments and cultures 	<ul style="list-style-type: none"> - Actively protect themselves and colleagues - Safety is embedded, instinctive - Well informed about risks and how to avoid them - Everyone should follow the rules and procedures, and have each other's back - Safe at work, safe at home - Work culture needs to align with own safety values

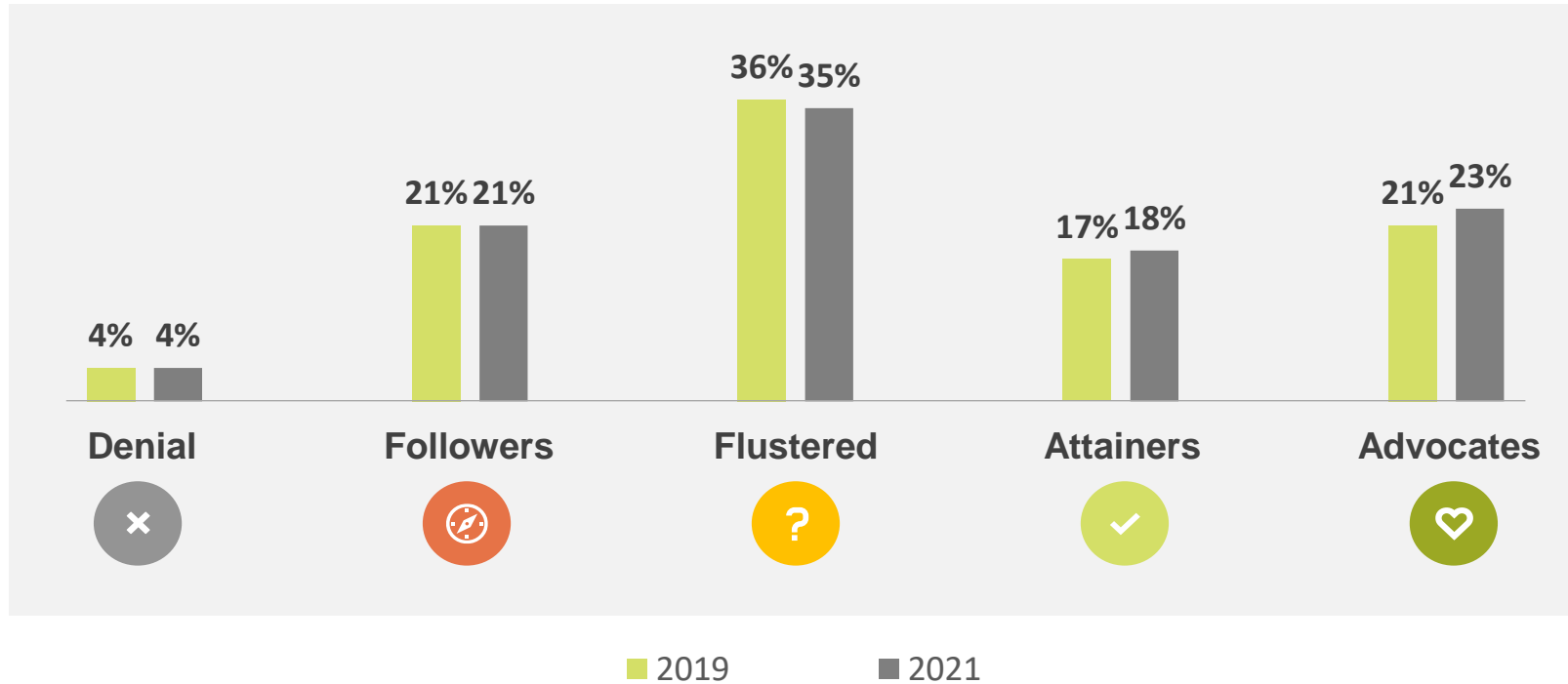
LESS ENGAGED MORE ENGAGED

There has been no significant change in the size of each segment since 2019.

HOW ENGAGED ARE WORKERS WITH KEEPING SAFE FROM HARM?

Over half (56%) of workers are fluid in nature when it comes to engagement with healthy and safe work practices. The desire is there for some, but for many, change will depend on what others do (Followers) or whether they can resolve their points of conflict (Flustered).

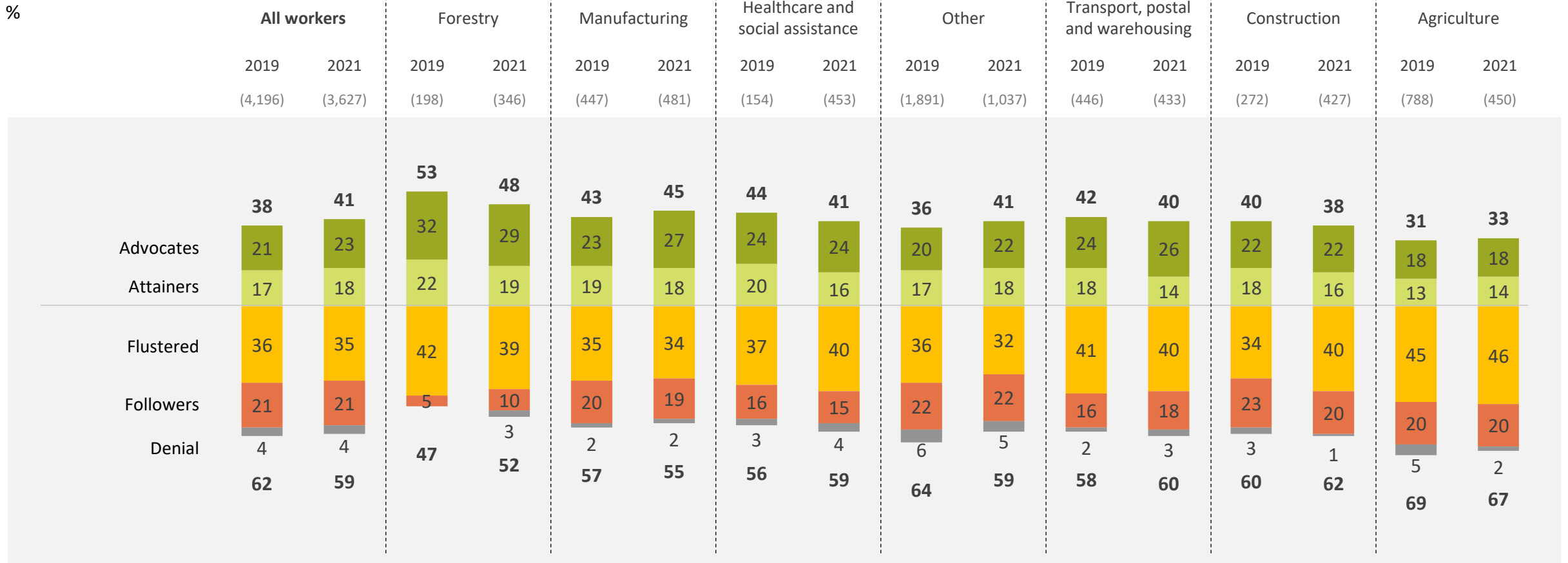
Less than one in 20 workers (4%) don't believe that engaging with health and safety at work is necessary or required. This hard-core segment may be more difficult to shift with communications and require other interventions.



Around four in 10 (41%) workers are highly engaged with being healthy and safe while at work (Advocates or Attainers). They recognise the importance, feel capable and aim to be safe wherever possible. More than one fifth are Advocates - key influencers of others who will drive change in others, and seek to influence views, particularly the Followers.

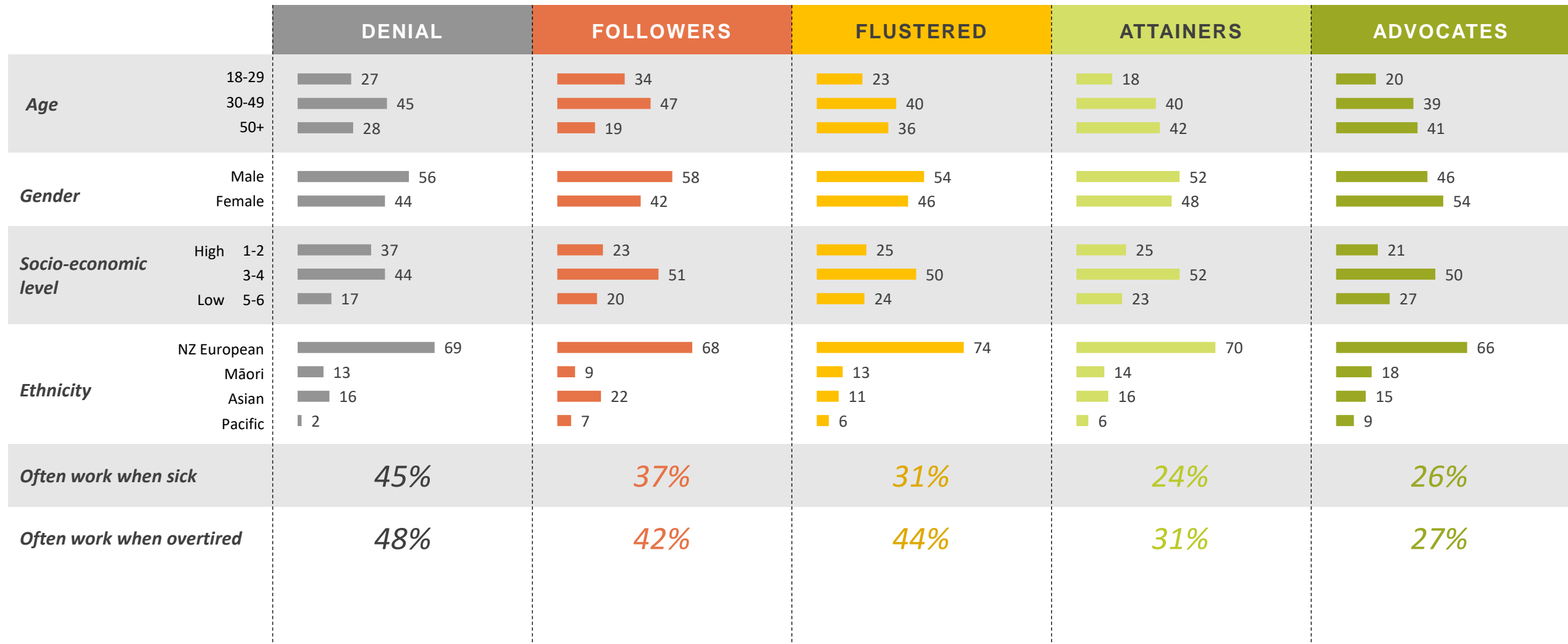
While worker engagement varies by sector, no significant changes are evident since 2019.

ENGAGEMENT SEGMENTS BY INDUSTRY



Base: All workers (see base sizes on chart)

As we saw in 2019, less engaged segments are younger and skewed towards men, and are more likely to work when sick or overtired.



When exposure to risk factors is held constant, greater worker engagement with health and safety leads to less harm requiring medical attention or time off work.

DOES GREATER ENGAGEMENT WITH HEALTH AND SAFETY LEAD TO LESS HARM?

While more engaged segments experience less harm, we also found that more engaged segments experience fewer exposures to risk factors. So we carried out a logistic regression to see what happens to the likelihood of harm that leads to medical attention or time off work when the amount of exposures to risk factors is held constant.

X 1.4

When the amount of exposure to risk factors is held constant across all segments, less engaged workers are 1.4 times more likely to experience **harm that led to medical attention or time off work** than strongly engaged workers.

For the purpose of this analysis, more engaged workers were defined as Advocates or Attainers. Less engaged workers were defined as the Flustered, Followers, or Denial segments. Harm in this analysis used self-reported responses and includes the following: an eye injury, injury to teeth/gums/mouth, a broken bone/fracture, an injury from crushing, a deep cut or wound that required stitches, a body part amputated, burns requiring medical attention, becoming unconscious from physical injury, serious head injury or concussion, blow to another body part requiring medical attention, and electrocution.

We have explored how behavioural influences interact to drive worker engagement using Path analysis.

For each engagement segment, the 2019 research (drawing on qualitative and survey research) presented behavioural pathways to greater engagement with health and safety. These recommendations remain relevant.

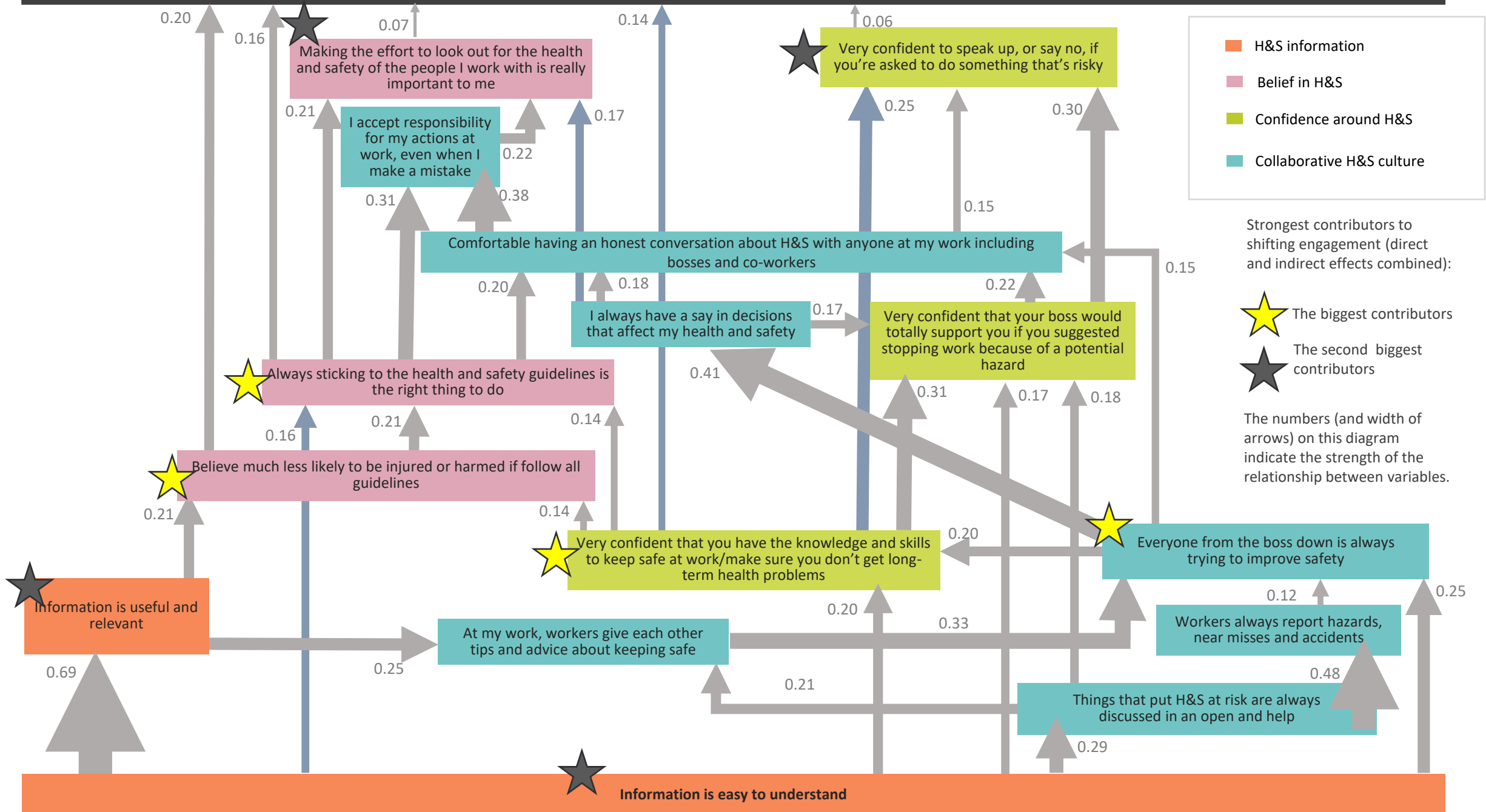
The 2021 survey included a number of new questions especially on education/training and H&S information. So this time, we've looked at how behavioural influencers interact in driving worker engagement, and in particular the role that education and training plays in this.

Path analysis has been used to evaluate the relationships between a dependent variable (worker engagement) and multiple dependent variables.

How to interpret the path analysis

- Both direct and indirect effects are identified
 - Indirect effects capture variables that appear to have no direct relationship with the overall measure of worker engagement, but contribute to driving the worker engagement through impacting on direct drivers.
 - Path analysis allows us to map the inter-relationships of direct and indirect effects.
 - Direct drivers of worker engagement are illustrated by the arrows that reach the very top box on the diagram.
- The magnitude and significance of the effects is quantified
 - On the model overleaf, the wider the line/arrow the stronger the relationship.
 - Insignificant and very weak relationships are not shown on the model.
- The hypothesised direction of the relationship between two variables is indicated by the direction of the arrow. For example, an arrow pointing from A to B indicates that A has a direct effect on B.
- Stars are placed next to the variables that make the greatest contribution to worker engagement (direct and indirect combined).
- Page 74 summarises the key learnings from the path model.

WORKER ENGAGEMENT WITH HEALTH AND SAFETY



Key learnings from the path model

THE PATH ANALYSIS SHOWS THAT THERE ARE FOUR INTERWOVEN THEMES THAT HAVE THE MOST PROFOUND IMPACT UPON WORKER ENGAGEMENT WITH HEALTH AND SAFETY.

The provision of quality information

Having good health and safety information is the bedrock of health and safety engagement – but it is not a strong direct driver of engagement itself. Rather, it is the provision of quality information (easy to understand, useful and relevant) that drives the ensuing beliefs and culture which then in turn have an impact upon health and safety engagement.

The belief that health and safety guidelines are both effective in reducing harm and are therefore the right thing to do.

Believing that following health and safety means you are less likely to come to harm as a result is important to establishing the key belief that it is therefore the right thing to do. These are also the single biggest direct drivers of engagement.

The confidence in their knowledge of health and safety.

This also leads to confidence in support from their boss for speaking up or stopping work.

A collaborative culture that supports these beliefs and confidence.

Particularly impactful is the sense that everyone – from the boss down – is playing a role in improving safety.

For each of the behavioural influences in the path model, this table summarises the prevalence of positive results. The opportunity often lies in increasing the number of workers in the top category (e.g. getting workers to be very confident).

	<i>Top two categories</i>	<i>Top category</i>
Always sticking to the H&S guidelines is the right thing to do	84% agree	53% strongly agree
Believe much less likely to be injured or harmed if follow all guidelines	72% less likely	48% much less likely
You have the knowledge and skills to keep safe at work	90% confident	56% very confident
You have the knowledge and skills to make sure you don't get long-term health problems	79% confident ▼	43% very confident
Everyone from the boss down is always trying to improve safety	63% agree	33% strongly agree
Information is useful and relevant	65% agree	36% strongly agree
Making the effort to look out for the health and safety of the people I work with is really important to me	84% agree	56% strongly agree
Information is easy to understand	64% agree	38% strongly agree
Confident to speak up, or say no, if you're asked to do something that's risky	86% confident	59% very confident
At my work, workers give each other tips and advice about keeping safe	62% agree	24% strongly agree
I'm comfortable having an honest conversation about H&S with anyone at my work including bosses and co-workers	81% agree	50% strongly agree
Confident that your boss would totally support you if you suggested stopping work because of a potential hazard	77% confident	51% very confident
Things that put H&S at risk are always discussed in an open and helpful way	60% most or always	29% always
I accept responsibility for my actions at work, even when I make a mistake	91% agree	66% strongly agree
I always have a say in decisions that affect my health and safety	65% agree ▼	38% strongly agree
Workers always report hazards, near misses and accidents	63% always or most of the time ▼	27% always

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