AUSTRALIANOW

Topline Report 6: 30 April 2020

Quantum Market Research

Hall & Partners

CLEMENGER BBDO

Understanding COVID

These are unprecedented times.

Using cultural tracking expertise and leveraging 25 years of insights generated from AustraliaSCAN, AustraliaNOW provides an ongoing understanding of Australians' attitudes and perceptions to the COVID-19 crisis.

Capturing emergent themes, how they co-exist and inter-relate, this study will explore and define what this means for organisations and brands to help them prepare for and navigate the days, weeks and months ahead.

Culture and society cannot be understood with surveys alone – we need to study people in their natural environment and influences around them to provide context and clarity to the results of this research. This complementary approach takes unstructured data from various sources and models it to find themes, behaviours, and feelings.

Above all else, this is a developing process that will evolve as people and culture do and will help us understand what has changed, however temporarily or permanently, and why.

Method

- 300 interviews per day, 5 days per week closely tracking the rapidly changing sentiment of Australians
- This report draws from 7,364 interviews
- 60 interviews per state (NSW, VIC, WA, QLD, OTHER) per day
- All interviews with those 18 years and over and weighted to a representative national sample
- Integration of 25 years of AustraliaSCAN to provide deep context
- Report fieldwork timing 26th March – 29th April 2020

Search

Google Trends tracks ~1,500 categories of interest which we monitor to see if there are any behavioural changes happening in Australia that might be of interest. It is focused on behavior, not feelings.

Social

We monitor every Tweet and every Reddit post in Australia that is focused on the current pandemic. We analyse to monitor general sentiment, 8 key emotions, and what's driving them.

News

We capture 4k Australian News Headlines daily that are captured in 15 minute intervals to show us what the media is focusing on, and how they're going about it in terms of sentiment.

The Last Week

As we reach the end of April, reflections on the status of the crisis vary greatly between generations.

Those aged 60+ are driving a nationwide shift toward becoming more relaxed and optimistic. Being financially secure, and feeling safe from illness, they anticipate the worst personal impact of COVID-19 is behind them.

By contrast, from the perspective of those in their 30s, especially families with young children, the situation has not improved. Among the 30-39s, there's the same level of stress and anxiety as was being felt before Easter.

Uncertainty and frustration characterises the middle-aged (40-59) whose households are less resilient to loss of earnings, who may struggle to re-enter the jobs market, and who cannot plan for retirement.

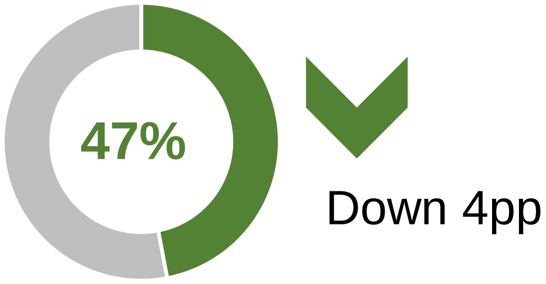
In a week when some respected sources turned conversation from *recession* to *depression*, more than two-thirds of Australians agreed the worst economic impacts of COVID-19 are yet to come. So, whilst a relaxation in shutdown is on the horizon, and that's certainly a relief, it's done little to put those of working age at ease.

In this environment it makes sense that patterns of behavior and spending are predicted to change long after shutdown is lifted. But what that looks like varies greatly by individual circumstance. The most financially pressured are active in looking for new ways to save and new ways to earn. For now, those with more financial freedom look forward to new domestic travel opportunities and spending to support local business.

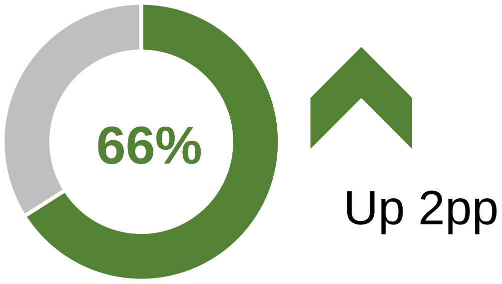
Snapshot: The Last Week

Survey

MINDSET
Very/Extreme concern

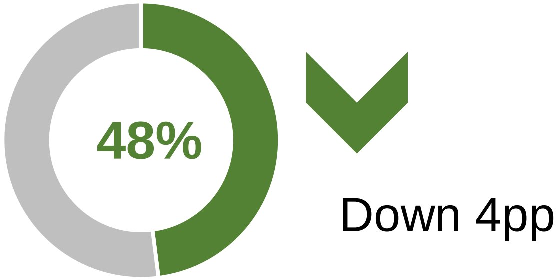


MINDSET
Motivation

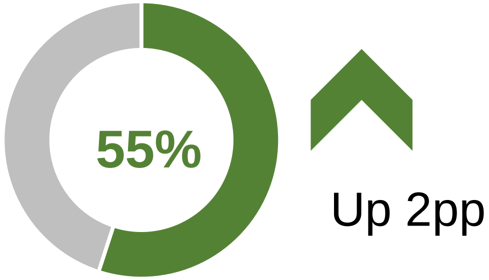


MINDSET
Uncertainty

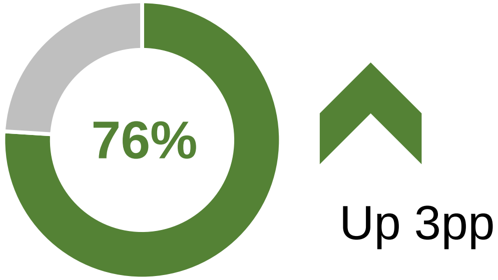
IMPACT
Struggle to pay



LEADERSHIP
Media just right

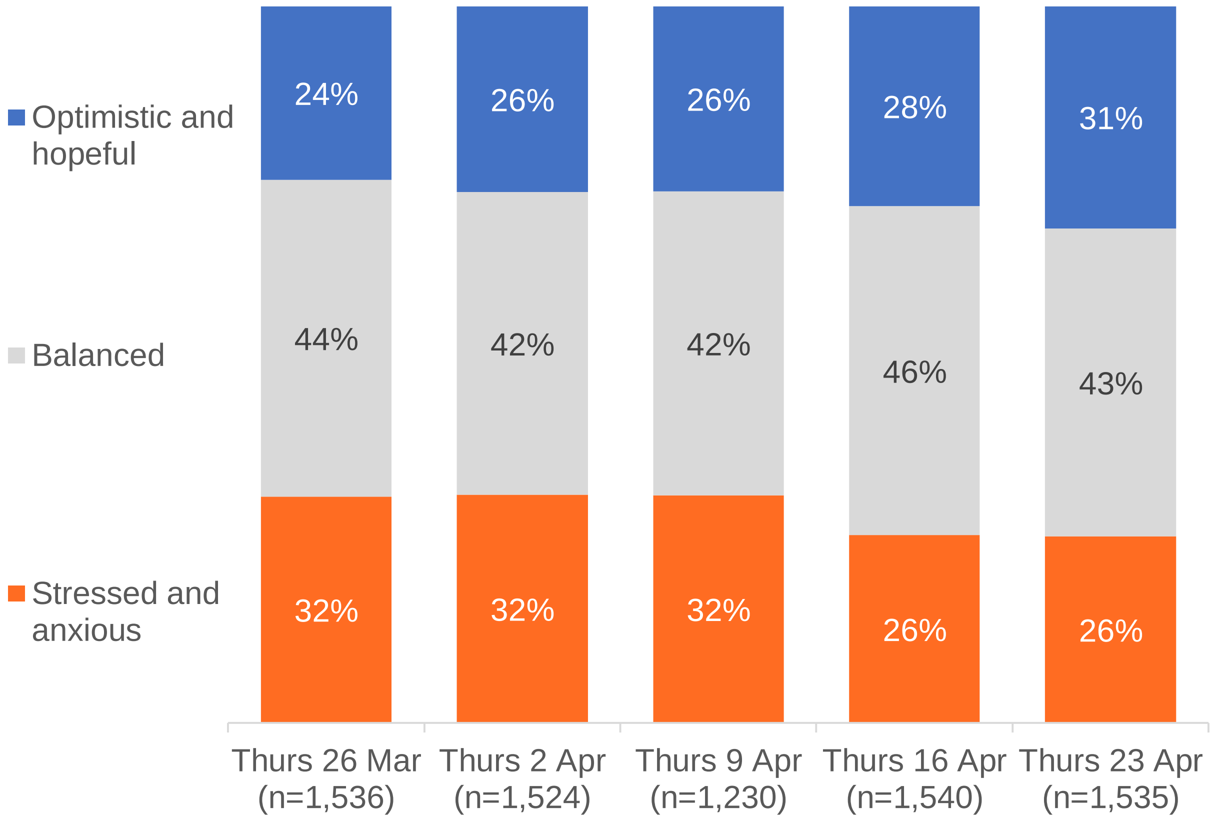


LEADERSHIP
Fed Gov confidence



All respondents (w/c 23rd April n=1,534 vs. w/c 16th April n=1,540)

Limited shift to optimism



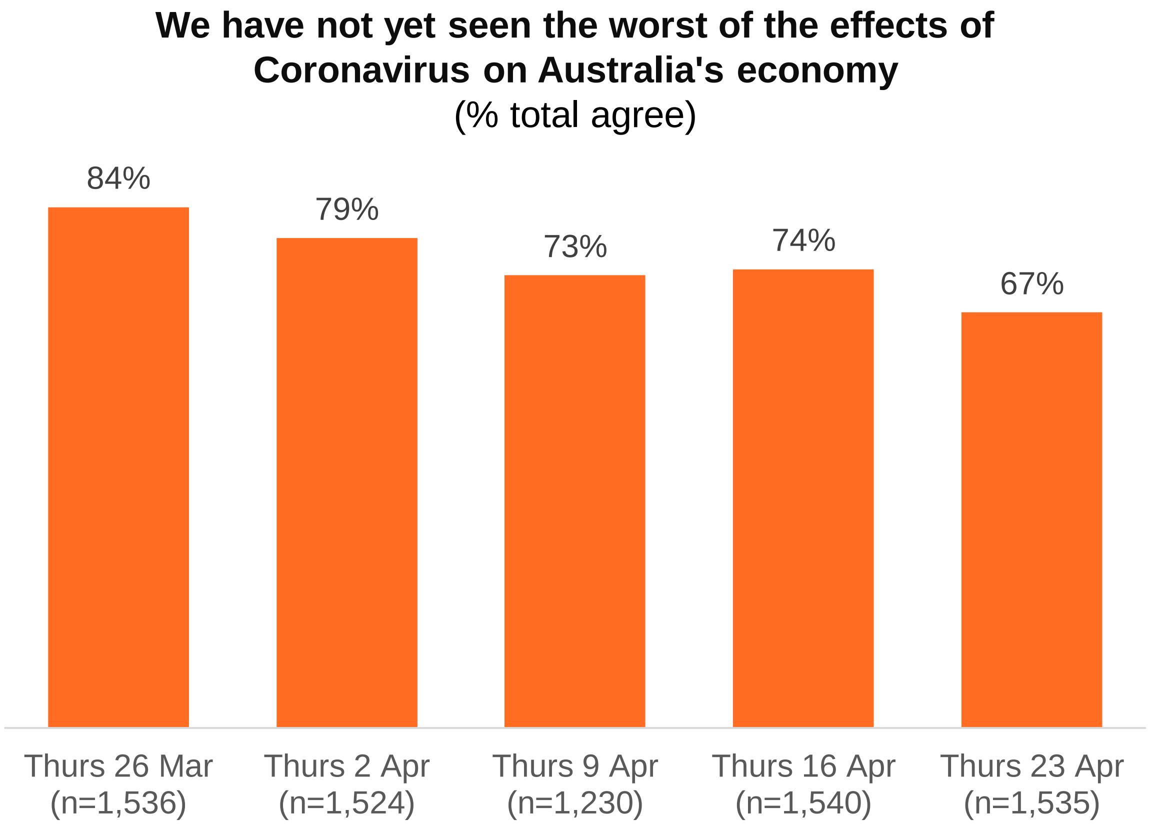
Those who are stressed and anxious has maintained this week to just over a quarter (26%) of Australians. There was however, a shift upwards in those feeling optimistic and hopeful to 31%.

This week the media has painted a mixed picture of the future, the prospect of relaxed rules meets a story of economic hardship in the months and years ahead.

For some Australians, expectations of the future are improving, but for many they are not.

Q7. Thinking back over the last week, how often did you feel…
All respondents

The **worst is yet to come**



Q10. Do you agree or disagree with the following statements?
All respondents

This week the RBA predicted a 10% decline in national output for the first half of this year, a 20% reduction in hours worked and unemployment to reach 10% by June. It is estimated that 800,000 have already lost their jobs.

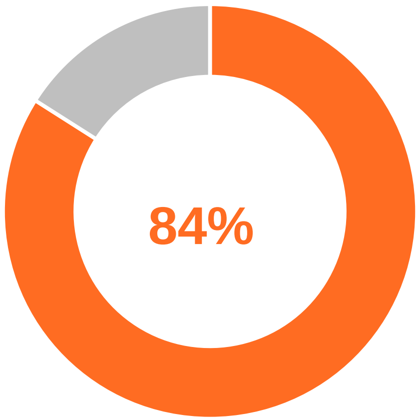
Among some respected sources, conversation turned from *recession* to *depression*.

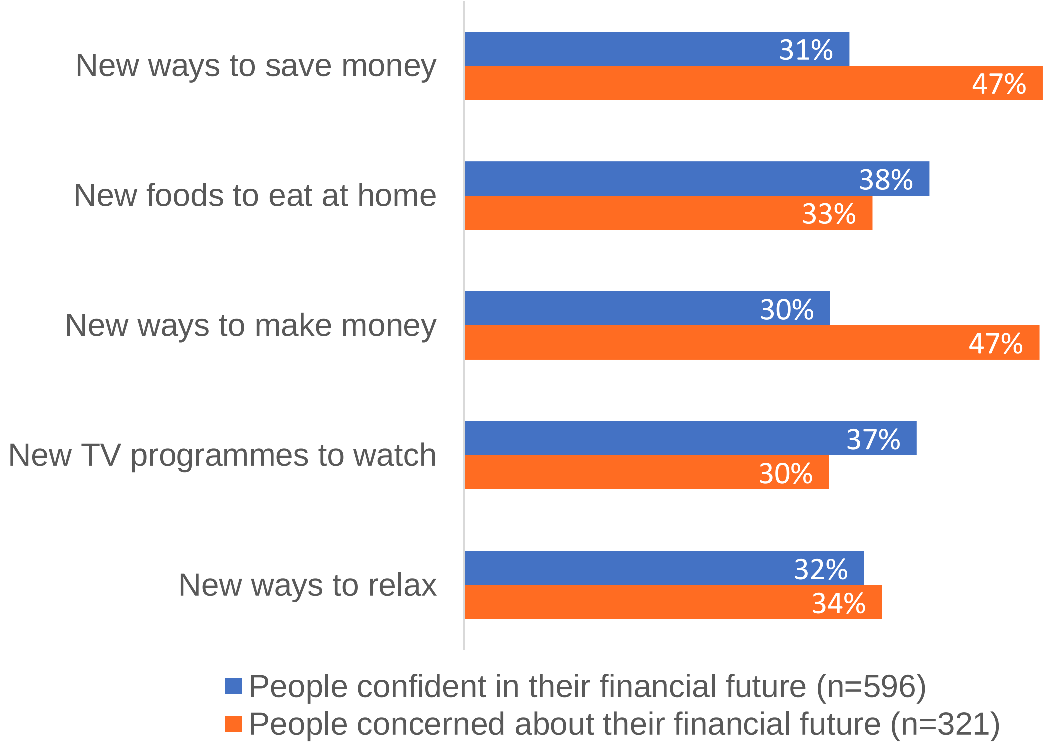
Whilst the prevalence of economic concern is no longer as widespread as it was initially, two thirds (67%) of Australians remain alert to these ominous forecasts.

Breaking habits: trying new things

Survey

Looking for new ways of doing things
(% all Australians)



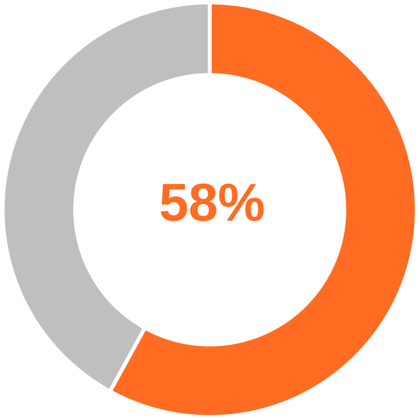


Q21c. For which of the activities listed below are you, yourself, looking for a new way of doing things
All respondents w/c Thurs 23rd April (n=1,534)

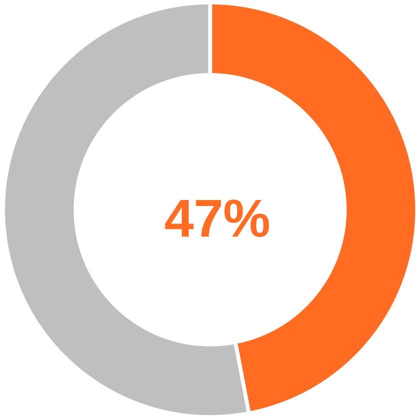
Old ways gone forever?

Impact of COVID-19 on habits

I've found new ways of doing things which I will keep doing after COVID
(% total agree)



Having broken some habits, there are things which I will not go back to after COVID
(% total agree)



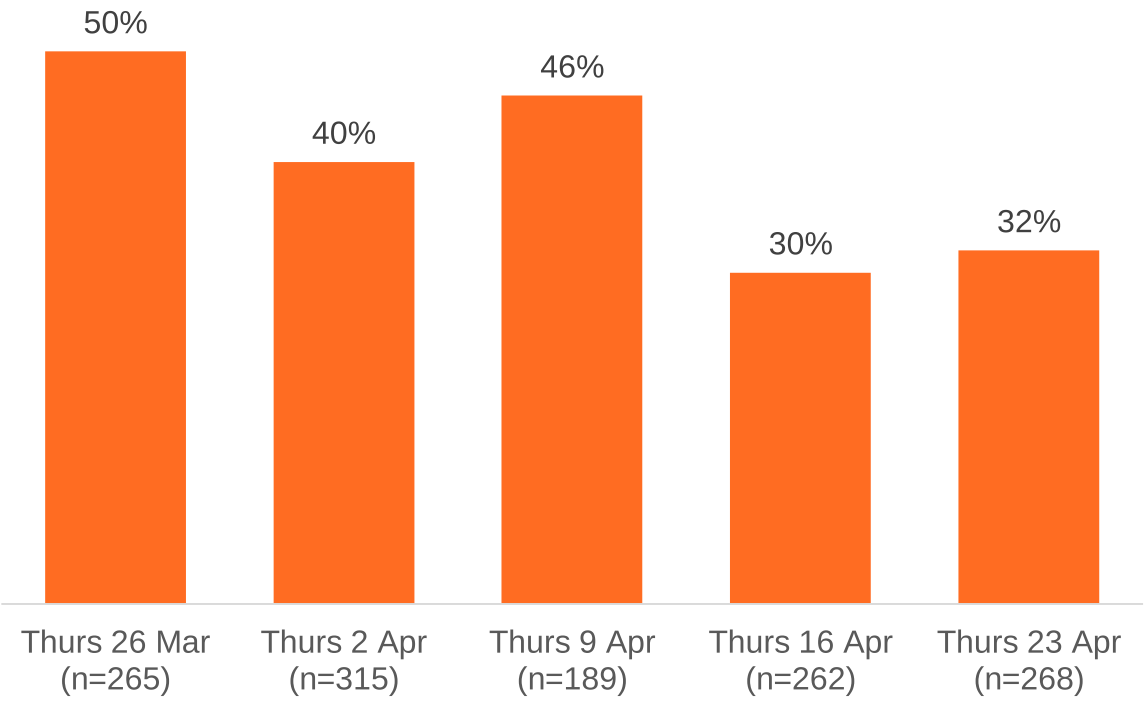
Younger Australians are more likely to have found new ways of doing things (67% of 18-29s).

30-39s are most likely to believe they have broken some habits for good (62%).

Which habits will truly stick and which will revert back?

21d. The following are all things people have said about how Coronavirus/Covid-19 might leave a lasting impression on them once the lockdown measures begin to be relaxed. To what extent do the following apply to you? All respondents w/c Thurs 23rd April (n=1,534)

A third will struggle to pay the mortgage



In our search analysis we have seen an increase in people looking to prepare and improve their finances. In addition, banks have been united in providing home loan support. With an improved understanding of their position and relaxed repayment plans, fewer are now concerned about paying the mortgage.

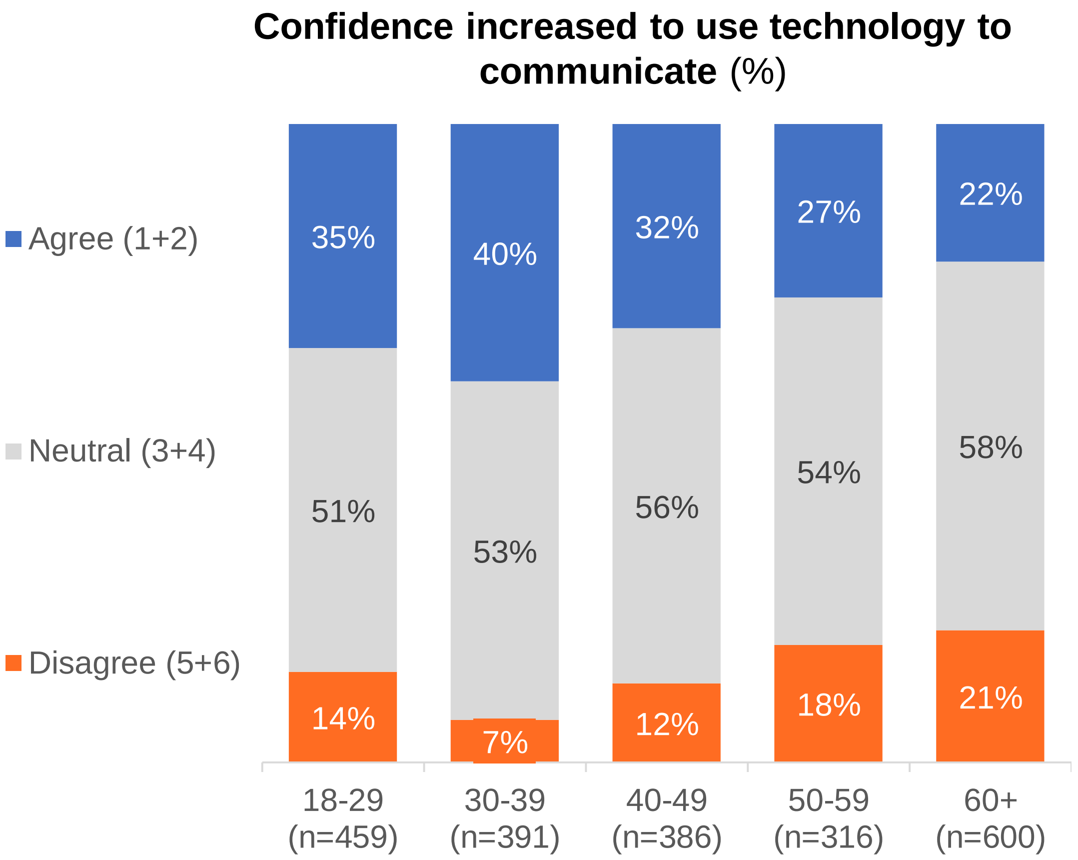
This week, those who will struggle to make mortgage payments are much more likely to often feel isolated (34%), compared to just 24% of all Australians.

Over 60s are considerably less likely to be worried about making mortgage payments (just 24% feel they'll struggle) suggesting an underlying financial cushion not apparent in younger age groups.

Q12. In the next three months do you think you will struggle to pay any of the following? Mortgage
All mortgage holders

Better at remote connections

Survey



It is odd to think that the youngest Australians, already most comfortable online, are those who've gained the most confidence in using technology to communicate.

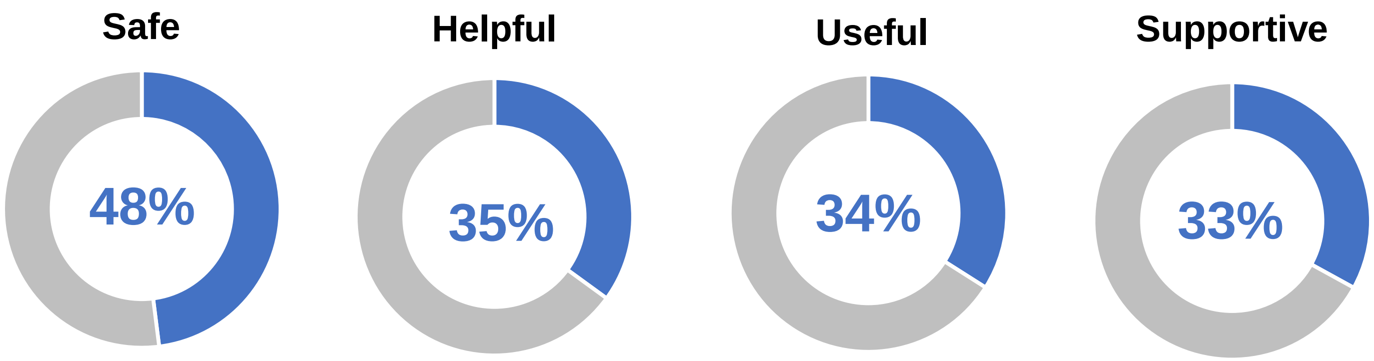
It took a pandemic for us to finally accept the effectiveness of video conferencing. This is among the habits we feel are most likely to endure post-COVID.

How will organizations capitalise on this behavioural shift to reduce overheads or improve service? What will be the impact for commercial real estate or will we revert back?

Q21d. I will be more confident using technology to communicate with other people / businesses / access services after COVID
All respondents

Provide me with safety and support

I want brands to be… (%)



Brand attributes that over-index by age

18-29	30-39	40-59	60+
Progressive	Optimistic	Useful	Safe
Attentive	Progressive	-	Positive
Escapist	Escapist	-	Realistic

We are aware of the benefits of continuing to communicate during recessionary conditions, but we have seen brands struggle to resonate and stay true to their strategy in the current environment.

Safety, service and support dominate the wants of consumers.

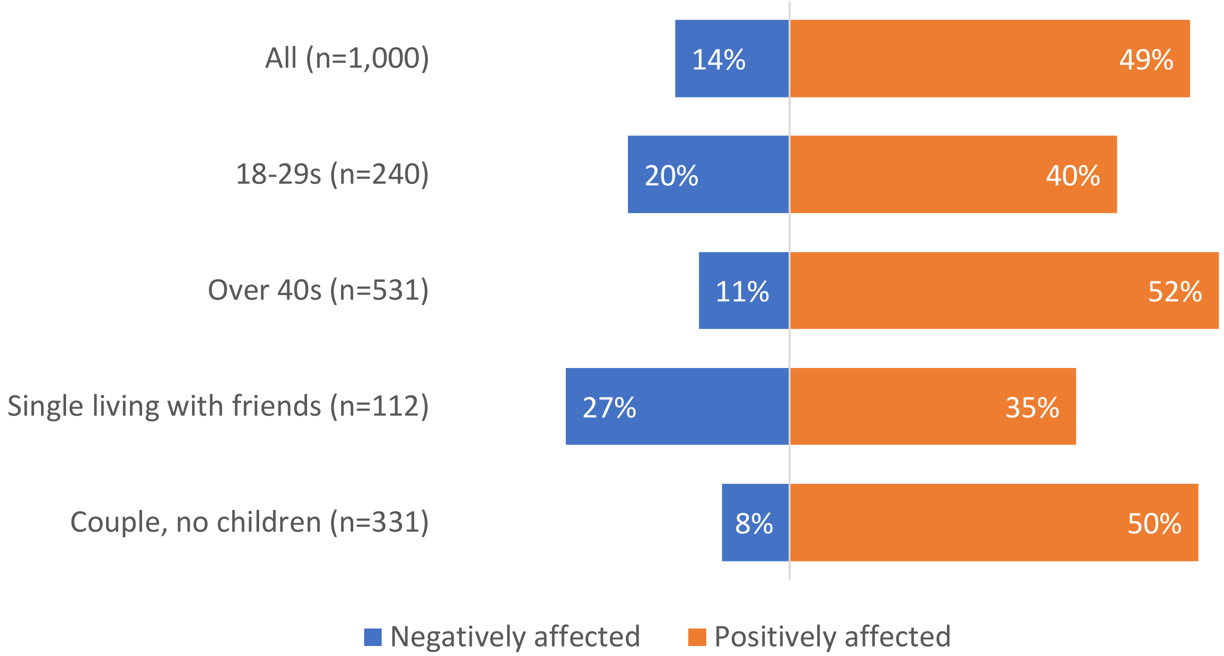
The importance of safety is being exaggerated by those aged 60+ - 56% want brands to be safe.

Q18. I want organisations/brands I use or buy to be…
All respondents (n=4,592)

A majority are appreciating the people they live with

Survey

Relationships with those in the household negatively/positively affected (%)

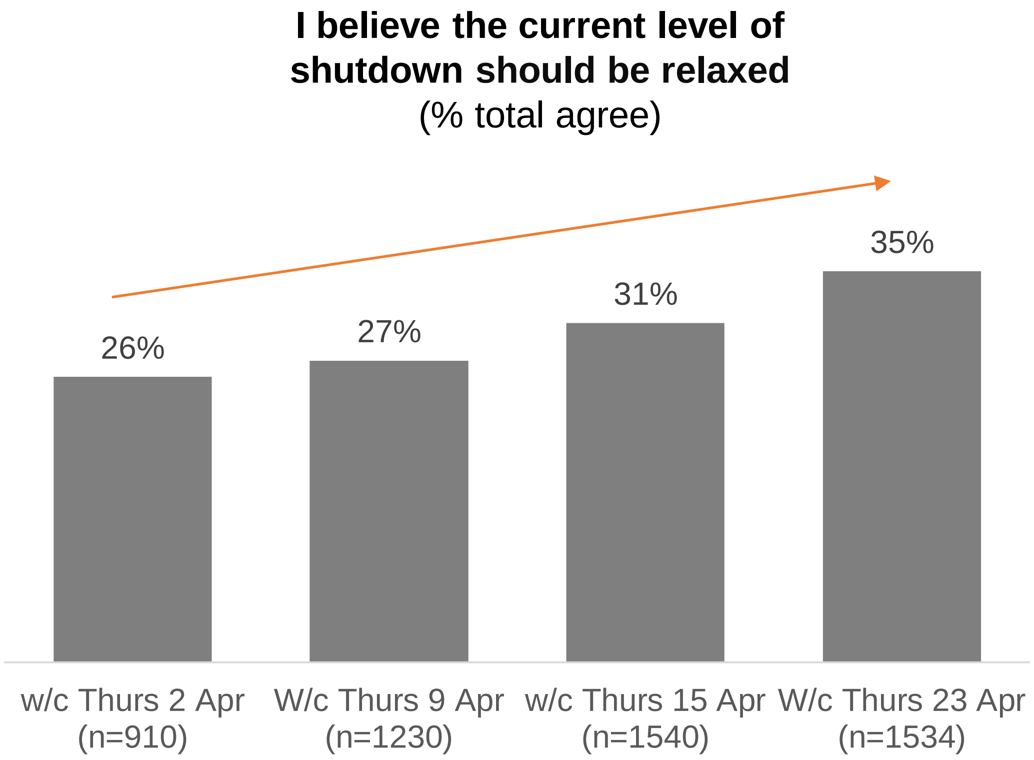


Younger Australians and those living with friends are more likely to feel their relationships with their households have been negatively affected.

10b. Please use the scale below to indicate what overall impact the Coronavirus/Covid-19 lockdown has had on relationships between the people in your household? All respondents w/c 23rd April (n=1,000)

No longer a consensus on shutdown

Survey



Following weeks of united public support for shutdown measures, things have started to shift.

It may not be publicly acceptable enough for them to say so, but almost half (43%) of full-time workers believe shutdown should be relaxed.

Q10. Do you agree or disagree with the following statements?
All respondents

AUSTRALIA NOW

Our ambition is to keep you and your organisation on the pulse, to be prepared for your next move as our situation develops. To hear more, discuss implications or consider how we can support you please contact your respective agency partner:

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