KANTAR

COVID-19 Barometer

Australia Snapshot

Wave 3:

7th - 9th April

Context:

Australian Government advice remains to be proactive with good social distancing and hygiene. Non essential services remain closed and travel over the Easter long weekend is firmly discouraged. As cases grow to over 6,000, there is almost 1/3 who have recovered from the virus.

Differences to the previous wave are shown in the brackets

Kantar interviewed 498 Australian aged 18+ online between the 7th and 9th April. They are nationally representative in terms of age, gender and region.

The national mood: we are...

Feeling concerned

Hugely — Not at all

33	38	12	13	4
(-4)	(0)	(+2)	(+3)	(-2)

29% (-2) About scarcity

43% (-6) About health

56% (+3) About economic outlook

Personally impacted

71% (-2) Experiencing day-to-day interruptions

63% (-5) Being more proactive about financial planning

64% (-8) Indicating their household income has or will be impacted as a result of the crisis

Prioritising

1. Being prepared and Informed — 34% (-2)
2. Worrying about myself and my loved ones — 18% (+1)
3. I am sure I will come out stronger — 15% (stable)

Wanting advice about:

Prevention

- 48% (-2) How long does the virus live on surfaces?
- 29% (-1) Who is at risk of severe illness?
- 25% (+7) Am I at risk from products shipped from abroad?

Diagnosis

- 46% (-5) How likely am I to catch the virus?
- 49% (stable) What are the symptoms?
- 19% (-5) How do I self isolate?

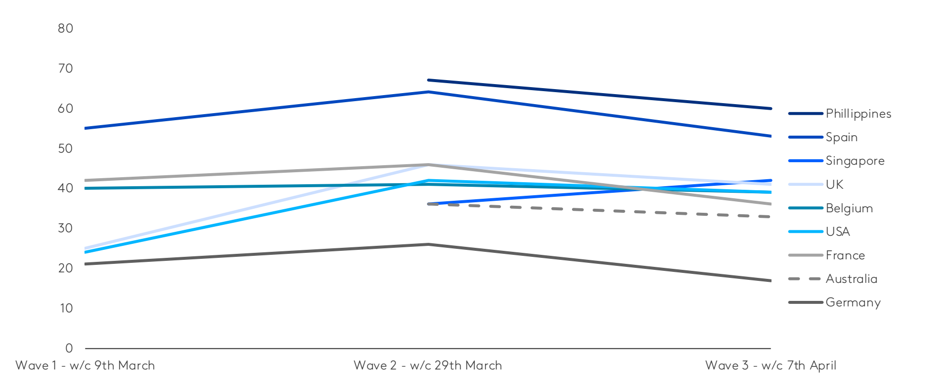
Behaviours

- 8% (+2) Should I travel abroad?
- 10% (-2) How should I wash my hands?
- 29% (+3) Should I wear a facemask?

As the crisis continues to evolve, Australians are becoming more accustomed to the coronavirus situation. Concern for COVID-19's impact on our daily lives, health and product scarcity is plateauing; and our growing concern is now turning to the long-term economic impact. Government financial stimulus intervention is increasing our confidence with an 8% drop in the number of households feeling they have been or will be impacted financially. We continue to prioritise preparation and keeping on top of information, but less people require self isolation advice.

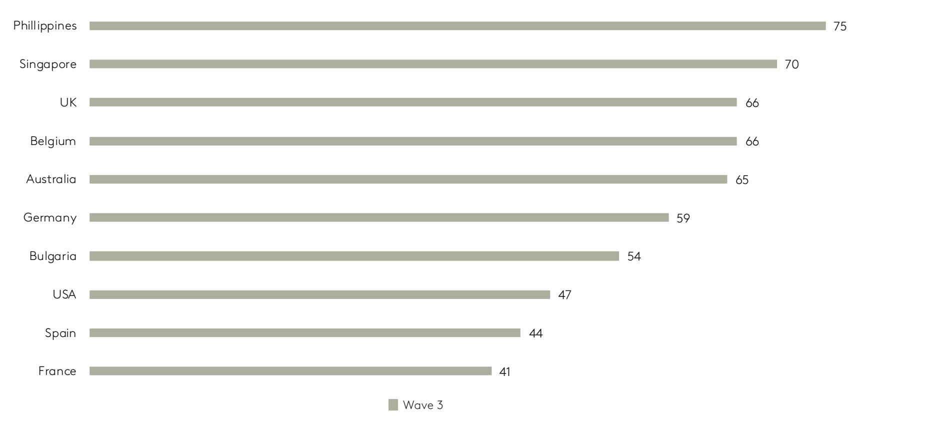
In comparison to the rest of the world

"The situation concerns me hugely"



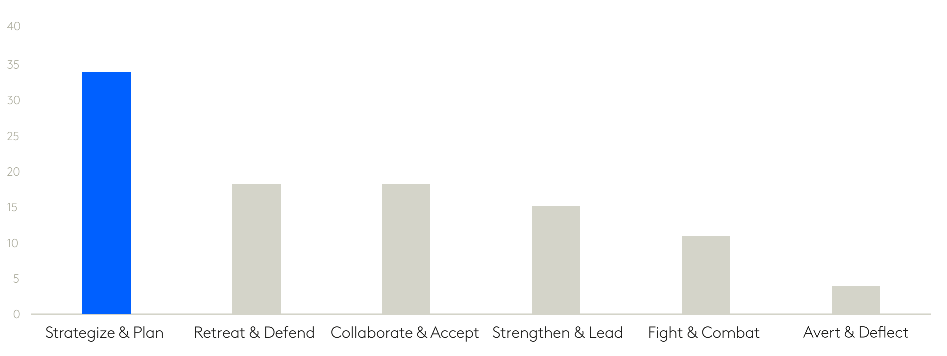
Globally, concern peaked in mid-March with most countries also experiencing a plateau. Interestingly we have seen concern increase in Singapore which reflects the number of recent cases.

Approval of government response to the coronavirus crisis



The plateauing is likely linked to increasing government action to address the crisis (led by Singapore and the Philippines), yet the toughest hit countries including the US, Spain and France are questioning their government's response.

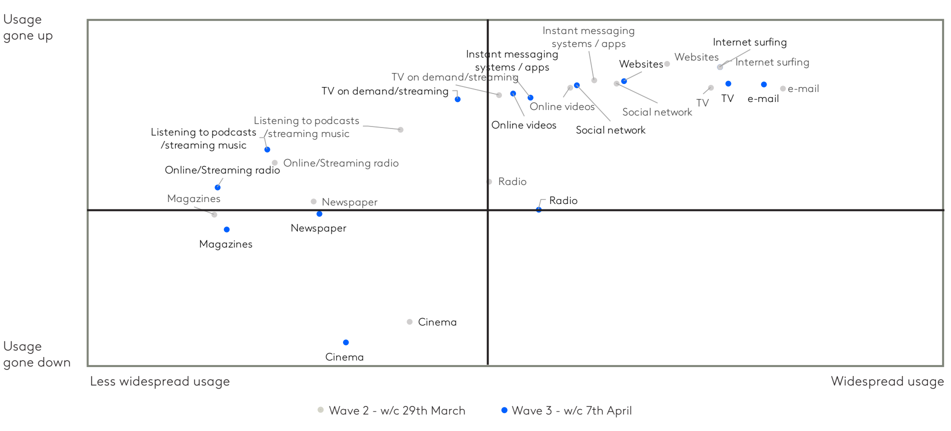
National Emotional Response



Growing Australian sentiment is that 'we have to react together, and we will make it if we stick together'. This presents an opportunity for brands to enable this new-found acceptance and collaboration that Australians are seeking.

We are adapting behaviours

Claimed Media Usage (past month)



People are maintaining their social distancing media habits. TV, email and internet surfing are still the most used mediums, yet streaming music/radio has reduced significantly.

The above-mentioned shift away from health concerns is reflected in the drop in seeking guidance from healthcare professionals; however, Australians are still seeking information from Australian government and media sources and their trust in the source has remained stable. The exception is our trust in international sources such as the World Health Organization.

Expected travel impact

The numbers below are the % of people who have stopped this activity

- 30% (+1) Public Transport
- 27% (+1) Taxi/ride hailing apps
- 4% (-1) Driving
- 48% (-5) Flying abroad (personal trips)
- 45% (-4) Flying abroad (work trips)
- 46% (-8) Taking cruises
- 31% *Car sharing
- 33% *Other vehicle sharing
- 40% *Staying in hotels

*The final 3 options are new this round and won't have differences

Top 5 trusted sources of information on COVID-19:

1. Government agency websites — 62% (stable)
2. National media channels — 47% (stable)
3. My doctor — 33% (-1)
4. International advisory bodies — 29% (-6)
5. My friends and family — 19% (-6)

What, where and how we are shopping is changing

Change in shopping habits (past month)

	What	Where	How
Decreasing	8% (Wave 2 w/c 29th March = -12%) Pay attention to products based on origin	30% (Wave 2 w/c 29th March =-28%) Avoid supermarkets & big shopping centres	
Increasing	28% (Wave 2 w/c 29th March = 26%) Paying more attention to prices	39% (Wave 2 w/c 29th March = 32%) Supermarkets close to home	40% (Wave 2 w/c 29th March = 36%) Electronic payments vs cash

Reasons we shop online:

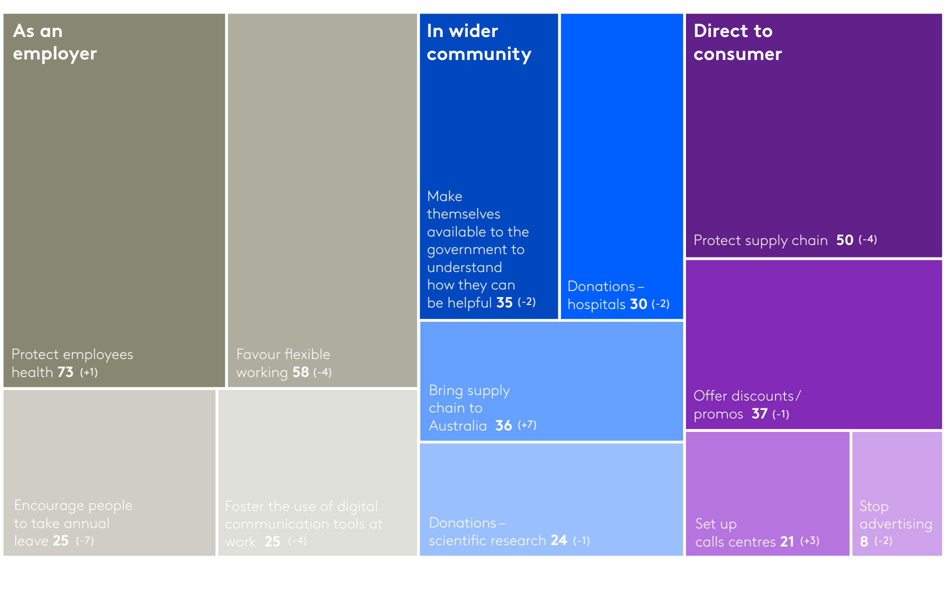
- Good prices 57% (-3)
- Convenience 46% (+1)
- To save time 53% (+3)

But... 30% don't consider online shopping as positive an experience as in-store.

Australian are shopping in the same way as they did a fortnight ago – closer to home and with electronic payment methods. Price sensitivity remains are big focus for shoppers. Increasingly, people are finding it difficult to shop online – likely due to an increase in the number of people shopping and availability of goods – but convenience and time saving benefits are proving alluring.

People are clear of what they want from companies and brands

What should companies do in this moment?



Australians want businesses to look after the health of their employees – it's the number one priority. Being encouraged to take annual leave is less appealing with a 7% drop in support. Bringing the supply chain to Australia is a key economic goal of Australians, likely to support job opportunities and confidence in origin of goods.

What should brands do at the moment?

- 33% Be practical and realistic and help consumers in their everyday life.
- 18% Be an example to guide change.
- 17% Use their knowledge to explain and inform.

Should:

talk about how they could be helpful in the new everyday life 34%

inform about their efforts to face the situation 31%

use a reassuring tone 30%

Should not:

NOT exploit the coronavirus situation to promote the brand 49%

Placing Australians at the heart of everything they do is critical for brands in the adaption to live under COVID-19. They should continue to be practical and realistic in their activities and communications and always maintain their core values.