

# COVID-19 BRAND NAVIGATOR

Real-time insights into the rapidly evolving landscape.

*3000+ Australians, data collected by our study partners i-Link Research*

## SPECIAL REPORT

# Mental Wellbeing During the COVID-19 Crisis

# COVID-19 Brand Navigator

## Agenda

1. The broad impact of COVID-19 on mental wellbeing
2. Openness to telehealth services
3. The emotional impact of employment changes
4. How transitioning to working from home has affected mental wellbeing
5. The role of workplaces in emotionally assisting employees
6. Top of mind concerns as restrictions begin to ease

# Key learnings

## 1

### For brands

**The impact of social distancing restrictions has played a clear role in Australians' mental health over time, with many feeling isolated and concerned. Australians are turning to online socialisation, hobbies and media to stay connected and occupied.**

#### **SO WHAT**

*Acknowledge the challenge and the mindset of consumers, address the concern, and identify your brand's role in maintaining normality, offering distraction, and facilitating connection.*

## 2

### For health / support services

**Australians indicate low openness to counselling telehealth services, particularly across older demographics. Positively, however, those who prioritise mental wellbeing have higher levels of uptake.**

#### **SO WHAT**

*Efforts at reducing barriers to telehealth services should be a priority to assist Australians during these unprecedented times, with some potentially believing their situation isn't 'serious enough' to warrant making use of these services. Improving access to telehealth services and technology in general should be a core focus.*

# Key learnings

3

**COVID-19 has had a devastating impact on employment, leaving those working fewer hours/ no longer working in a worse emotional state. There are some silver linings: those impacted believe that this has allowed them to re-evaluate and reconsider what they really want in life.**

## SO WHAT

*Employers should be cognisant of the emotional burden on their employees who are now working fewer hours and proactively offer relevant support.*

*It should also be understood that employees for whom it's 'business as usual' still require ongoing support during these times.*

*Employers might consider support services for those who have lost their job, and having open conversations with them about the transition.*

4

For employers

**The response to forced work-from-home (WFH) arrangements has been mixed, but ultimately many want this flexibility to remain when lockdown ends.**

## SO WHAT

*Offering flexible working conditions will be an opportunity for employers to differentiate in the future, and most staff are likely to welcome the flexibility, but any permanent shifts to WFH for all employees may be met with resistance. This is notwithstanding the challenges that exist with a remote workforce.*

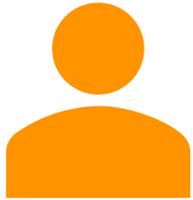
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**While most working Australians are feeling sufficiently supported by their workplaces, the type of 'support' needed is expressed in different ways.**

## SO WHAT

*No one size fits all employees, thus necessitating a tailored approach by employers. Enhance support by conducting regular check-ins on those for whom it's 'business as usual' and by offering leniency and mental health days for those WFH and parents who are juggling work while taking care of their kids. Promoting exercise should also be a key endeavour to safeguard mental wellbeing and improve productivity.*

# A reminder of our approach



## WHO

### Quantitative

- 3,300 Australians, bi-weekly pulses of n=200
- Nationally representative of Australians 16+

### Qualitative

- 20 people



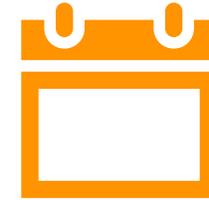
## WHAT

### Quantitative

- 20 minute online survey

### Qualitative

- Social distancing video diaries



## WHEN

### Quantitative

- Friday 27<sup>th</sup> March– April 30<sup>th</sup> March, 2020

### Qualitative

- w/c 9th March onwards



**Optimism is on the rise as  
there is a sense Australia is  
flattening the curve**

# The situation in Australia has rapidly improved over the last month

## Fieldwork: 27<sup>th</sup> March – 30<sup>th</sup> April 2020

Data collected Monday and Thursday, weekly

### March 24<sup>th</sup>

Australians encouraged to work from home, non-essential businesses ordered to close

### March 28<sup>th</sup>-31<sup>st</sup>

Highest one day increase recorded, gatherings limited to two people, states impose own restrictions and fines

### April 10

Recoveries outnumber current cases for the first time

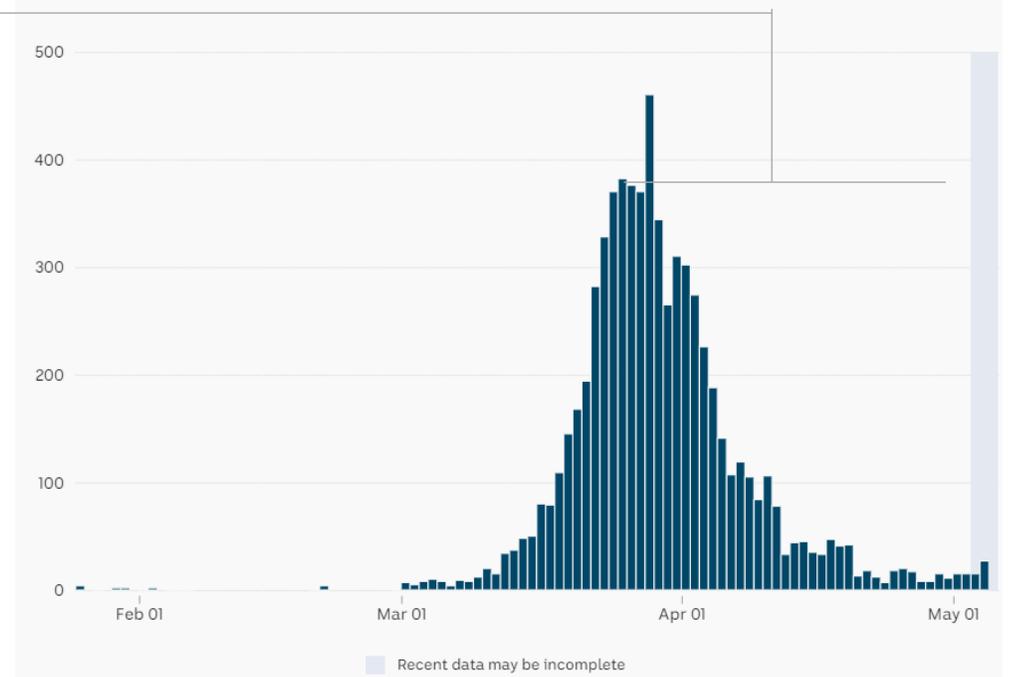
### April 15

Daily growth in total confirmed cases drops below 1 percent

### April 26-28

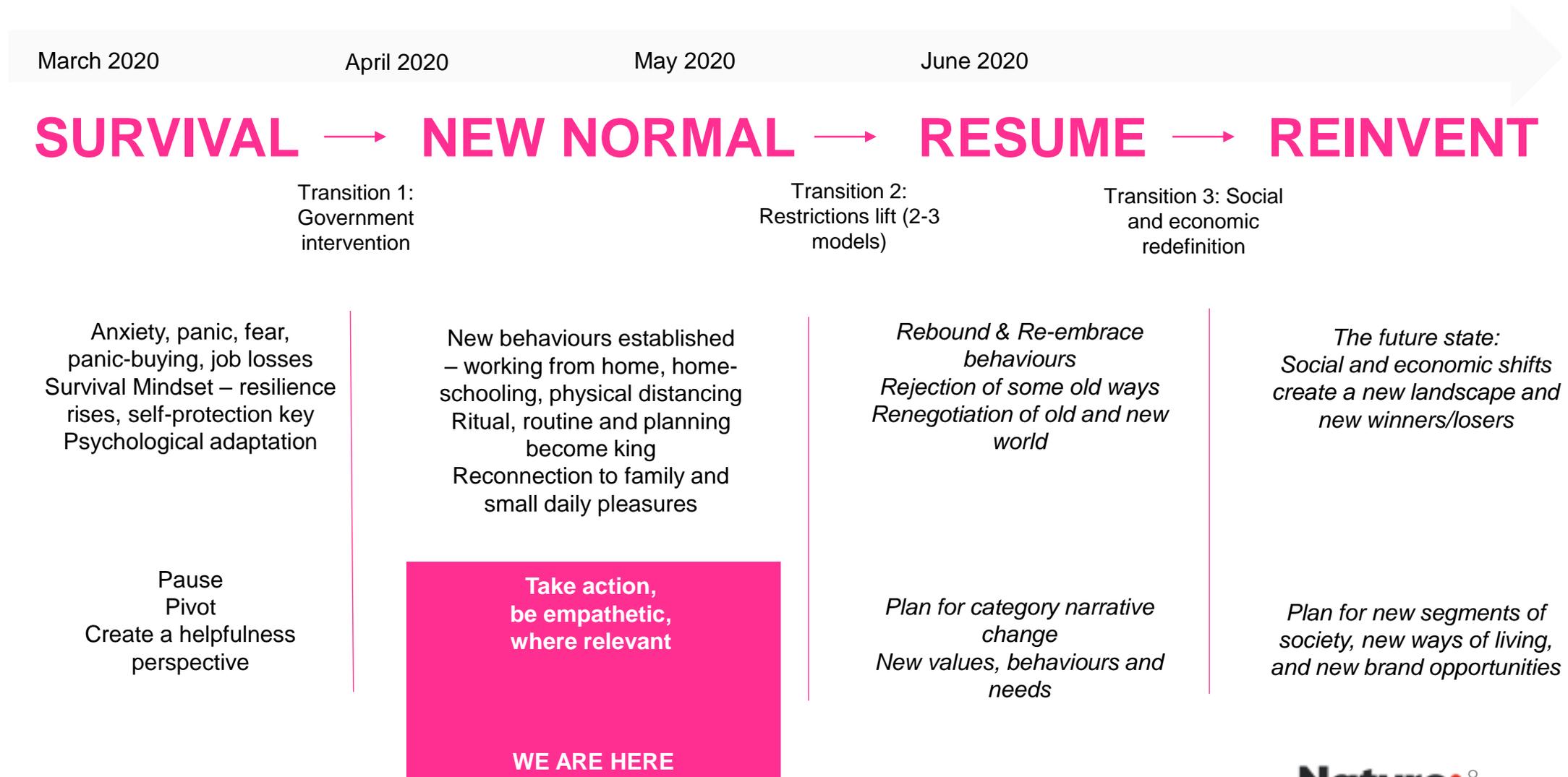
WA announces relaxing of restrictions, followed by NSW

New confirmed cases, daily count



Source: ABC News

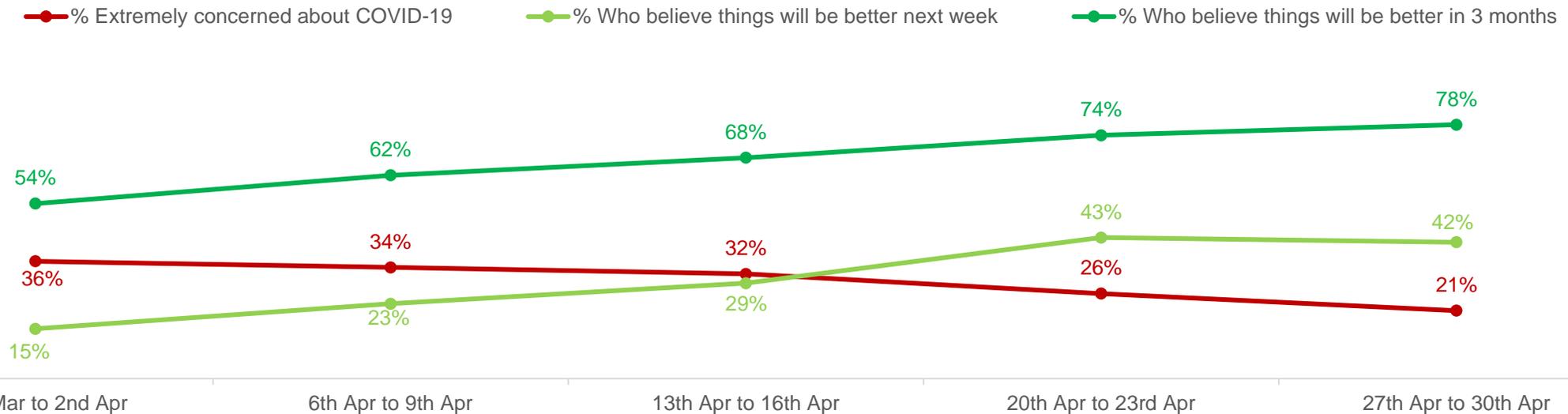
# The 4 stages of COVID-19



# As Australians adapted to restrictions, their optimism for the future has outweighed their concerns

## Key Outlook Measures

### Weekly Average



Q. B2. What is your overall level of concern about COVID-19? B8. Still thinking about the entire COVID-19 situation, how do you feel the situation will be this time next week? B9. And how do you feel the situation will be in 3 months? Base: Total (n=3,300)

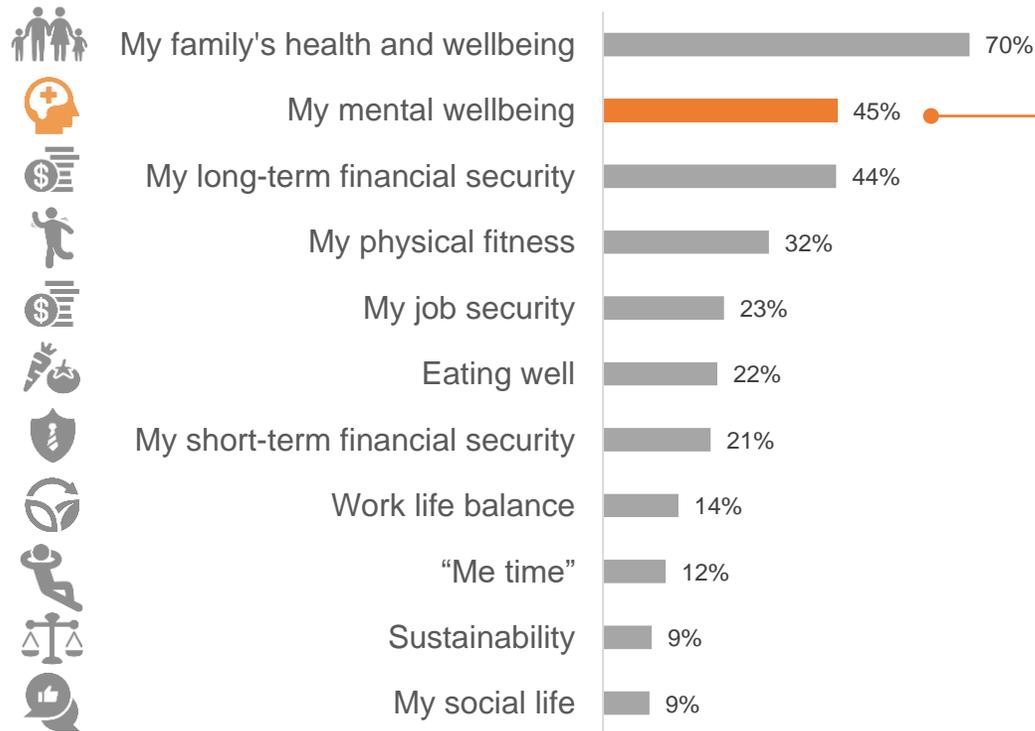


# The importance of mental health is changing

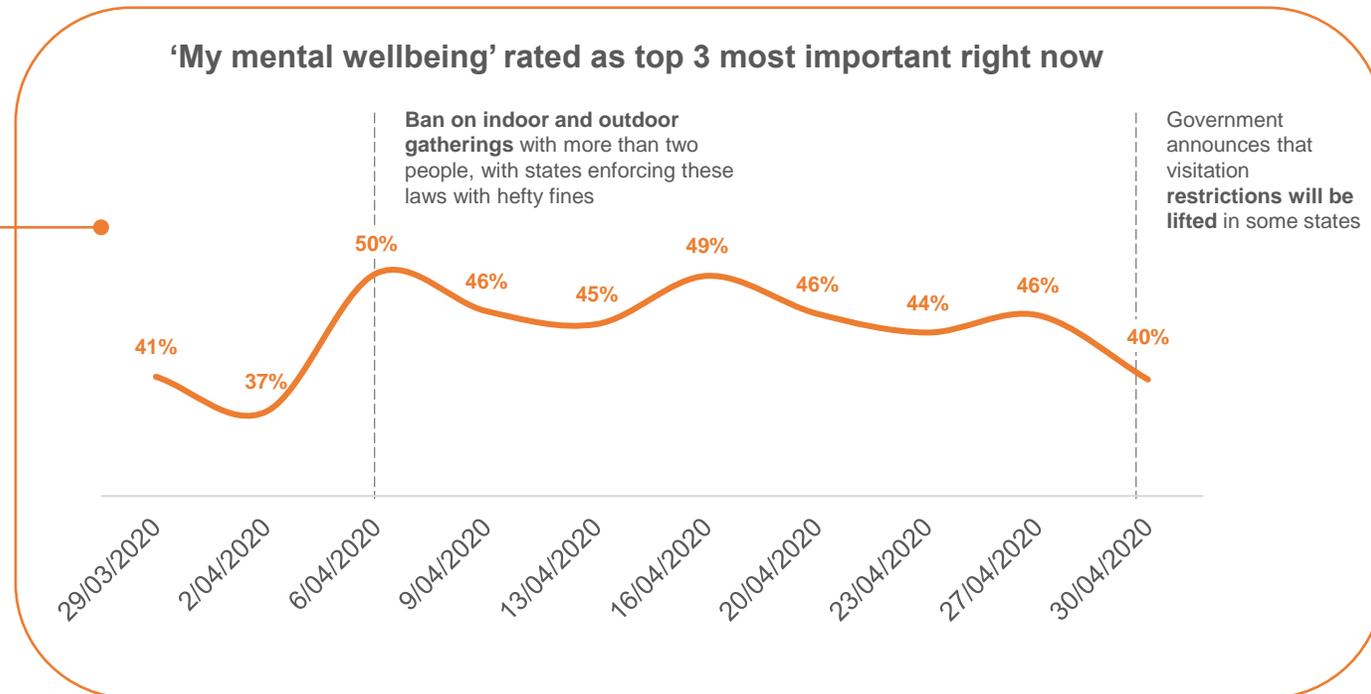
# Over time, the impact of social distancing restrictions has influenced the importance of mental health for Australians

## IMPORTANT AREAS OF LIFE

Average across past 6 weeks (29/03-30/04)



## Rated as top 3 most important right now...

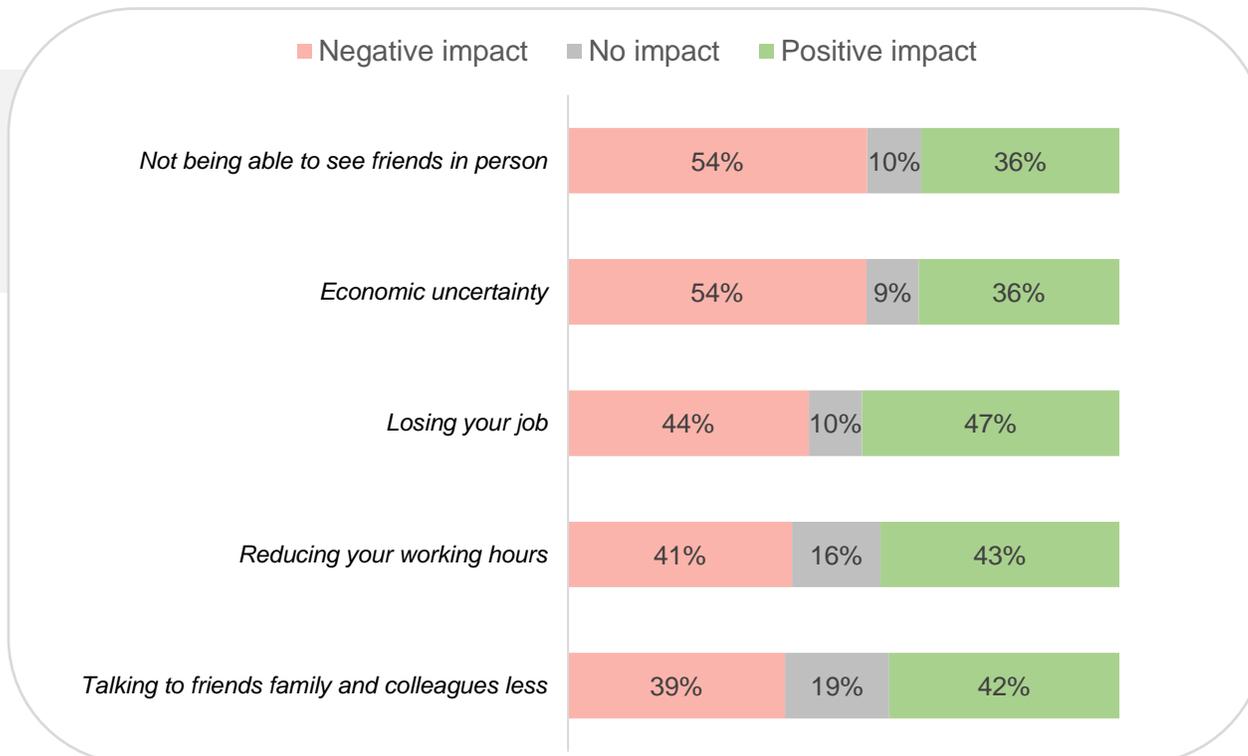


Q. A4. Of the following, which are the three most important to you right now?  
Base: Total (n=3,100)

# Being isolated from others and economic uncertainty are having a profound negative impact on the mental wellbeing of Australians

## IMPACT ON MENTAL HEALTH

Amongst those who have experienced each of these things



## Top 5 Negative Influencers



**Restrictions on physical social interactions and economic uncertainty are having the largest negative impact on mental health**

*“It’s been so hard not being able to physically be in contact and being unable to be together with my friends. Another of my friends who also lives on her own I’ve been calling a lot more as I know she having a hard time, I left a platter on her doorstep last week to see her briefly”*

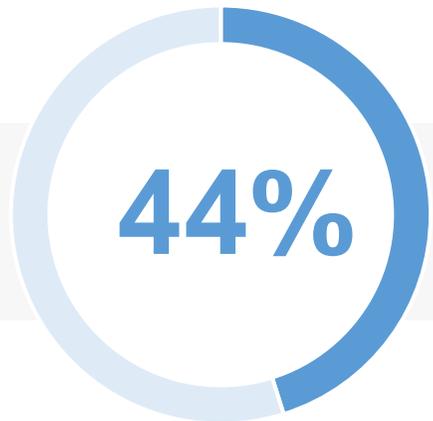
It’s not just concerns of financial security that weigh us down – it’s also simple relationships (or absence thereof). Humans crave physical contact and being starved of that can have a detrimental impact on our mental health.

Q. H1. First up, have any of the below had an impact on your mental health since the COVID-19 outbreak began?  
Base: Total (n=385)

# Loneliness and silent worrying have become highly prevalent in the context of prolonged isolation and economic concerns

## MENTAL HEALTH ATTITUDES

% Agree / Strongly Agree



...are putting on a brave face but privately feel really worried



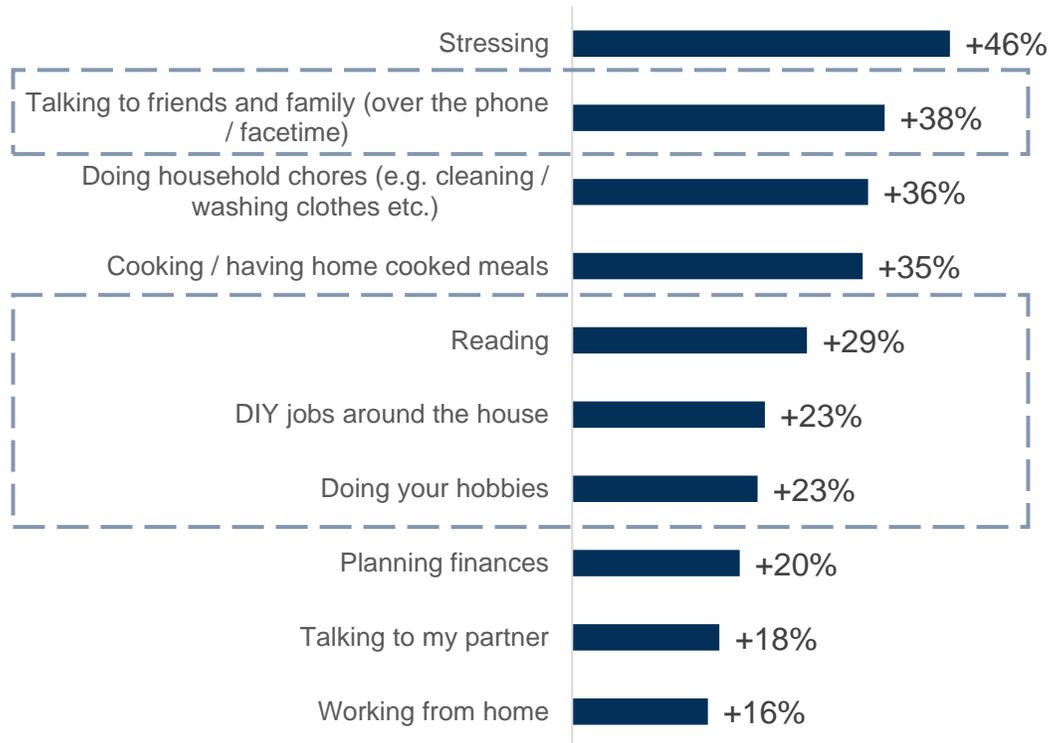
...feel isolated and alone

**Young Australians** aged 16-34 are at the greatest risk of loneliness, with **42% feeling isolated and alone**

# Whilst stress levels are high, Australians are using this time to connect with family / friends online and rediscover their passions

## TOP 10 CHANGES IN HOUSEHOLD HABITS SINCE THE COVID-19 OUTBREAK

Amongst those who rate mental wellbeing as a top 3 priority



NET impact (% doing more - % doing less)

Those who consider mental wellbeing a top 3 priority have turned to **online socialization** and **hobbies** since the outbreak

# They're also using their time to engage more heavily with a variety of media

## TOP 5 POSITIVE CHANGES IN MEDIA HABITS

NET impact (% doing more - % doing less)



Browsing Social Media

+38%



Watching TV (free to air)

+35%



Watching paid streaming services (Netflix, Disney etc.)

+31%



Watching YouTube videos

+28%



Reading Books

+21%



**Mental health support has  
never been more important**

# Whilst 1 in 2 Australians are open to consults with their GP over the phone, half that number are open to telehealth counselling

## OPENNESS TO TELEHEALTH

Having a consultation with a doctor / GP over the phone / online

48%

have done/  
intend to

Significantly higher  
openness amongst..

Those earning >\$200k  
(75%)

Having a consultation with any other  
medical professional over the phone /  
online

27%

have done/  
intend to

Significantly higher  
openness amongst..

Parents (36%)  
Those working more hours  
since the outbreak (45%)  
Those earning >\$200k  
(56%)

Receiving counselling / connecting  
with a psychologist or mental health  
service on the phone / online

26%

have done/  
intend to

Significantly higher  
openness amongst..

Parents (35%)  
Those working more hours  
since the outbreak (45%)  
Those earning >\$200k  
(48%)



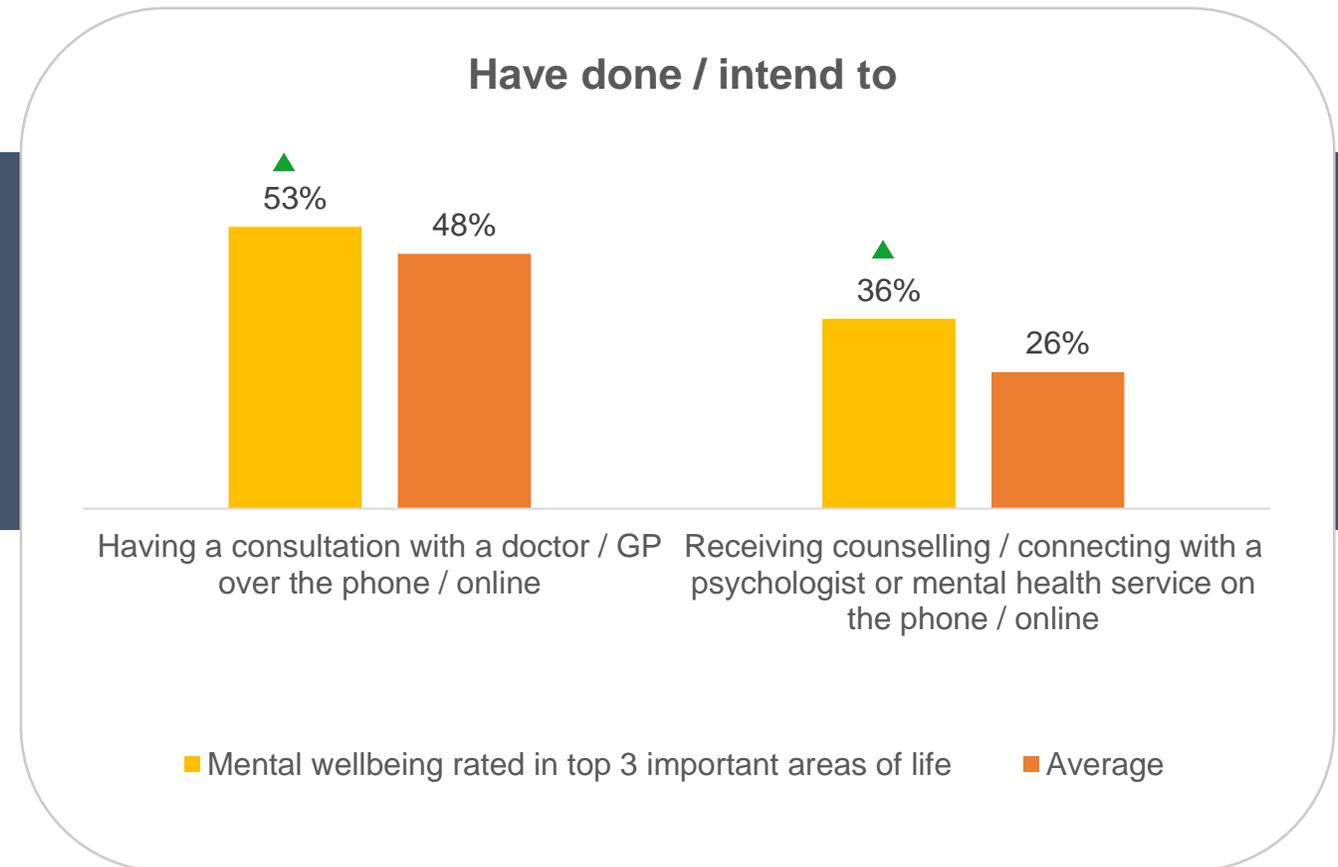
Despite the emotional hardships resulting from COVID-19, **3 in 4 (74%)** Australians **have never used counselling services and are not intending to**

*"I didn't actually know whether I could call one of those numbers like Beyond Blue because I didn't know whether that was just for suicide. I've heard on the radio that a lot of those services were under a lot of pressure at the moment and I was like well **I'm not dying, I'm not suicidal so someone else should take that spot, not me.**"*

*"I actually feel less inclined that I'd benefit from speaking to someone at the moment because **I kind of think everyone's in the same boat, what's really to be achieved from this.**"*

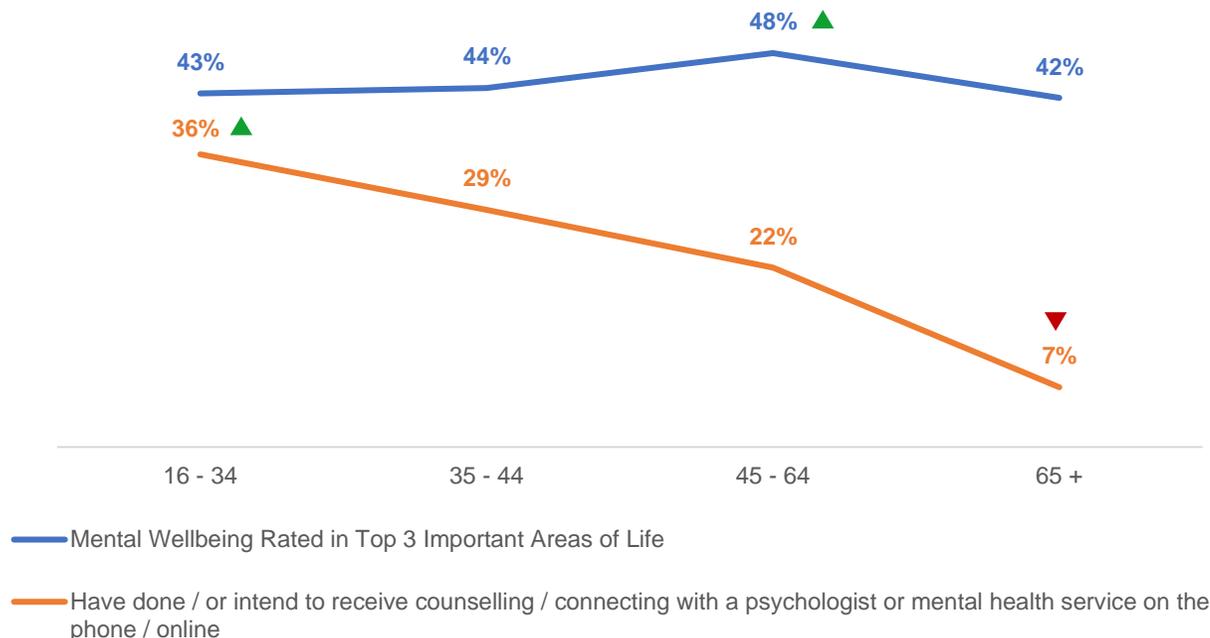
# Positively, however, those who highly value mental wellbeing indicate a stronger willingness to try telehealth counselling

Consideration and use of telehealth services is significantly higher amongst those who consider their mental wellbeing a high priority



# Alleviating barriers for older Australians should be a priority, particularly given the value they place on mental health

## THE GAP BETWEEN MENTAL HEALTH IMPORTANCE & OPENNESS TO TELEHEALTH



Addressing the **barriers potentially linked to the diminishing openness to telehealth** will be key to enhancing uptake

- Perceived usefulness / necessity
- Stigma around seeking psychological assistance
- Low awareness of the availability of telehealth services
- Poor knowledge of how to use telehealth
- Perceived security

Source: Cimperman, Brencic, Trkman & Stanoik, 2013;



# The impact of job loss is taking its toll on Australians' mental health

# COVID-19 has had a devastating impact on employment, with younger Australians and part-timers hit the hardest

## CHANGE IN EMPLOYMENT SINCE COVID-19 AMONGST THOSE WHO WERE WORKING PRE-VIRUS

**52%** of those working before COVID-19 have been impacted

9%

Are working **more hours**

- **High-income** earners (\$130k+ 15%)

28%

Are working **fewer hours**

- Those aged **under 34** (35%)

14%

Are **no longer working**

- Those aged **65+** (28%)
- **Part-time** workers (25%)
- Low-income earners (<\$20k 38%, \$20k-\$80k 17%)

48%

Have had **no change** to their employment

- Those aged **35-64** (55%)
- **Full-time** workers (53%)

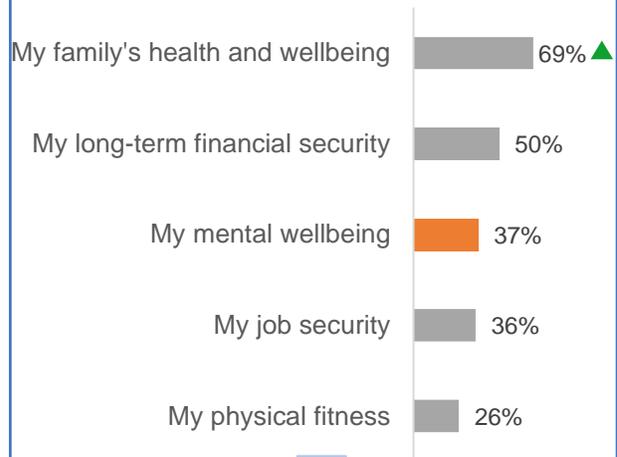
Groups significantly more affected

# Mental wellbeing is still important for Australians, regardless of the impact that COVID-19 has had on their work lives

## IMPORTANT AREAS OF LIFE

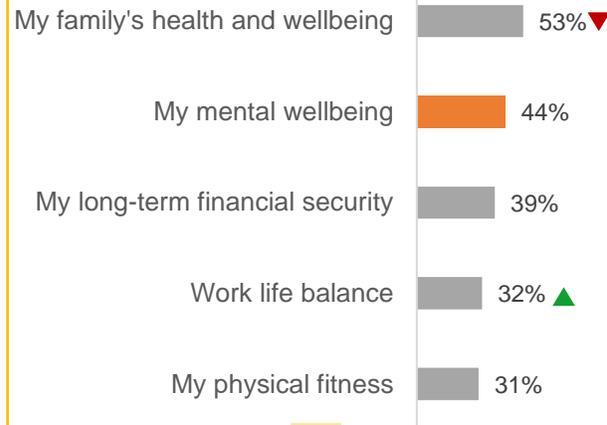
Rated as top 3 most important right now...

Have had **no change** to their employment



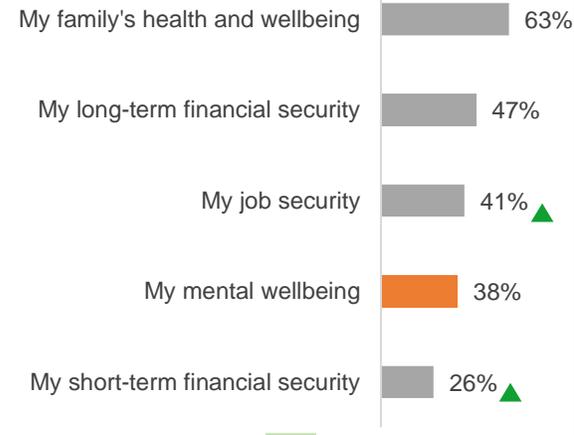
Place higher importance on **family health and wellbeing & work life balance**

Are working **more hours**



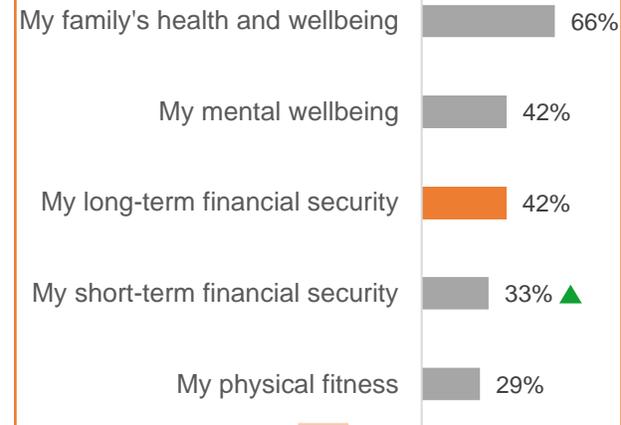
Place higher importance on **work life balance & eating well**

Are working **fewer hours**



Place higher importance on **job security, short-term financial security & social life**

Are **no longer working**



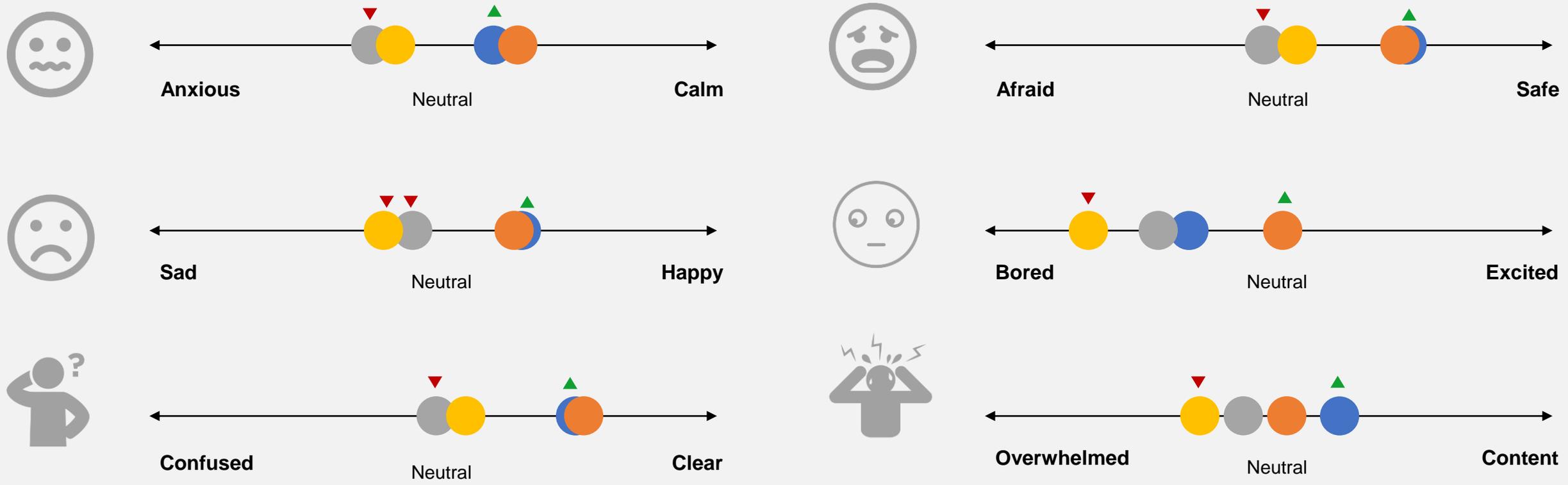
Place higher importance on **short-term financial security**

Q. A4. Of the following, which are the three most important to you right now?

Base: Those who were employed prior to COVID-19 total n=1,827 (no change n=901, working more hours n=176, working fewer hours n=484, no longer working n=266)

# Australians working fewer hours or no longer working have expressed the most pronounced negative emotional state

● No change in employment  
 ● Working more hours  
 ● Working fewer hours  
 ● No longer working

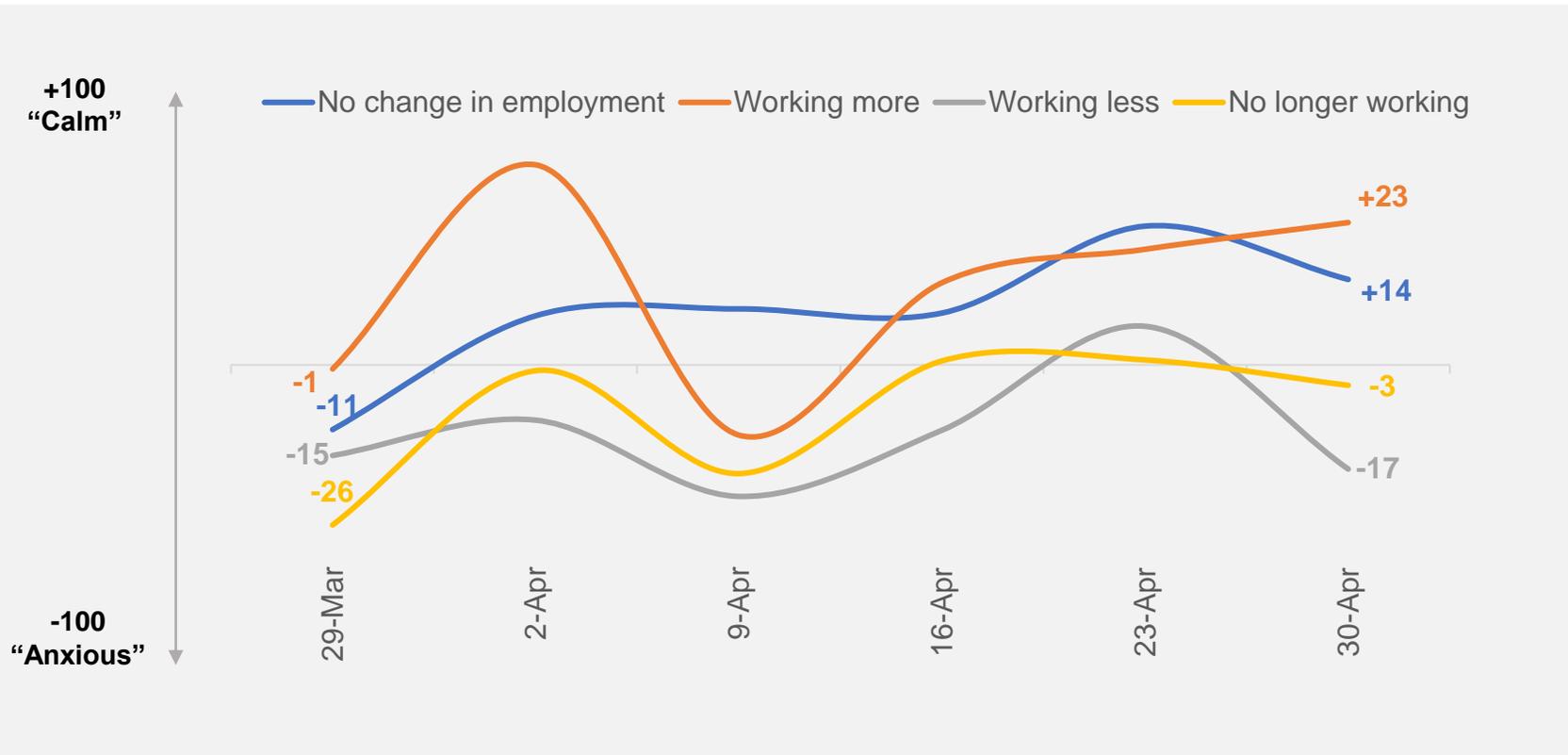


Q. B1. To start with, how are you feeling right now?  
 Base: Those who were employed prior to COVID-19 n=1,954

# Whilst Australians are gradually feeling less anxious overall, those impacted by job loss/reduction have been slower to recover

## FEELINGS OF CALM VS ANXIETY

## NET ANXIETY VS CALM SCORE



Feelings of "calm" have steadily improved amongst those who have had no change in employment

For those who are no longer working, whilst they were anxious in the beginning, it appears as though the shock is slowly stabilising

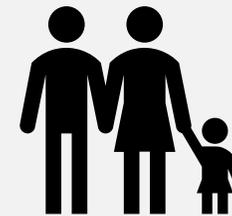
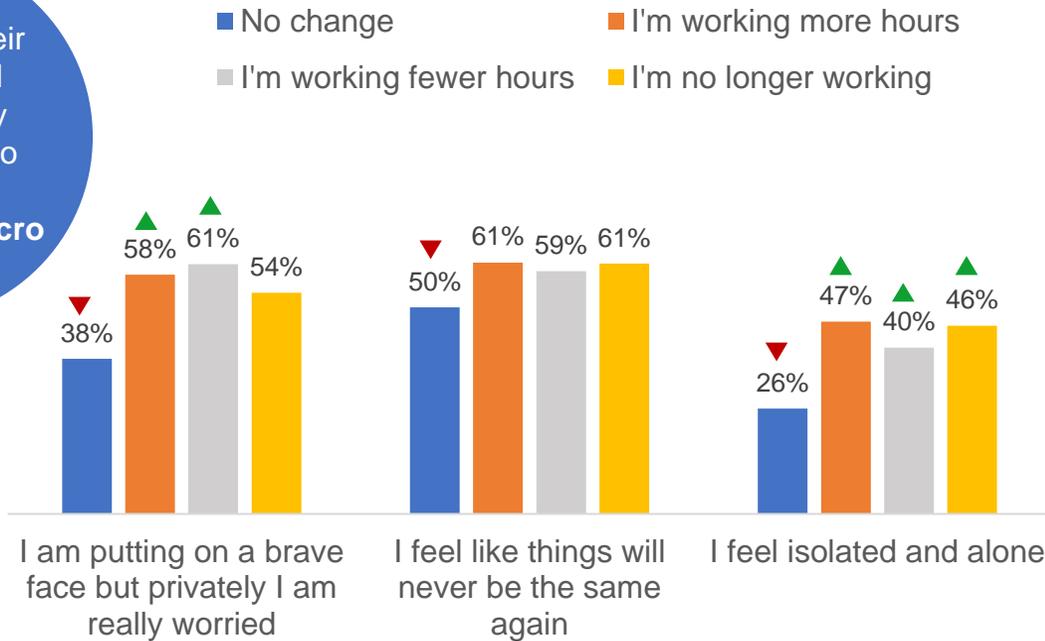
Q. B1. To start with, how are you feeling right now?  
Base: Those who were employed prior to COVID-19 n=1,954

# Those with no change to their employment have fewer mental health flags

## MENTAL HEALTH VALUES

% Agree / Strongly Agree

A lack of disruption to their daily lives and routine is likely allowing them to more easily process the macro issues



But positively, irrespective of any change to employment

**7 in 10**

believe that we will **get through this** and be **stronger because of it**

(results are consistent across key demographics)

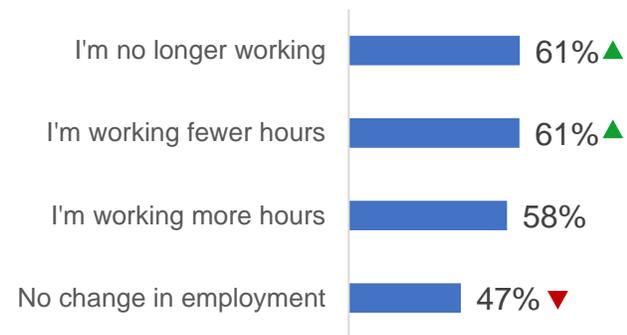
# The positive impact of job loss / reduction is that it has freed people up to re-evaluate and consider what they really want in life

## % Agree / Strongly Agree



**54%**

agree that this crisis has made me reconsider what I really want out of life



**65%**

agree that this is the reset we needed to re-evaluate how we were living



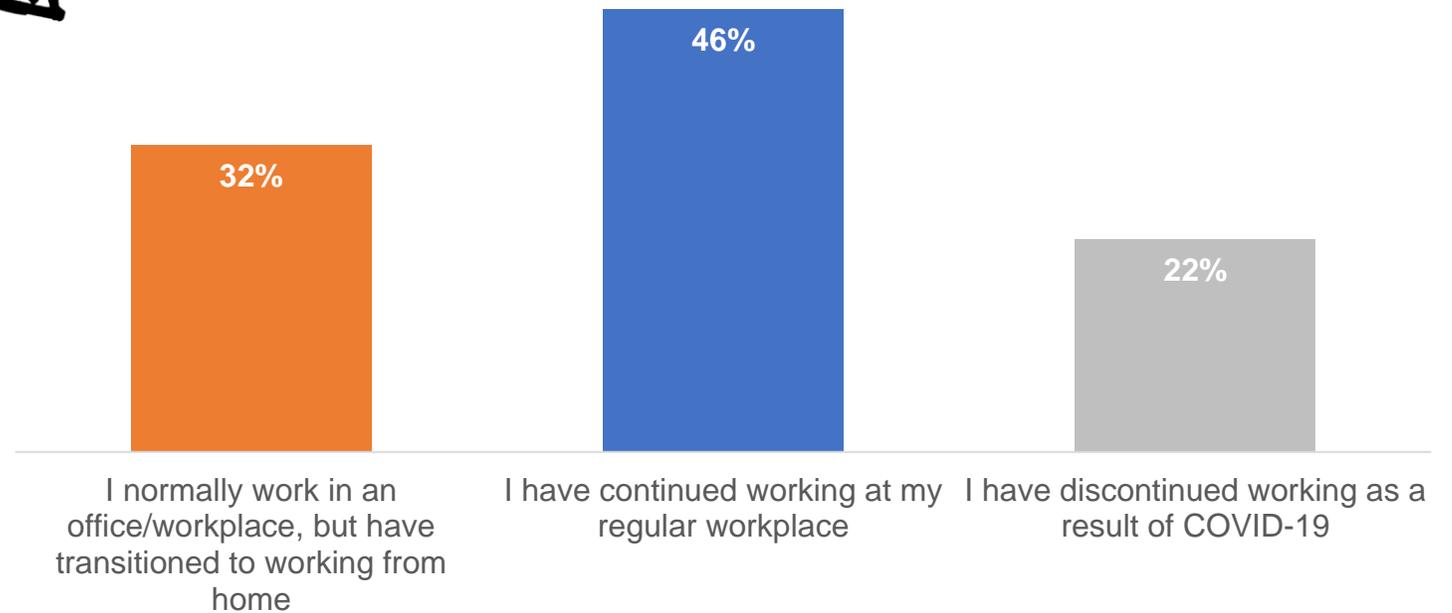


**For the many Australians who have transitioned to working from home, this has been met with mixed response**

# COVID-19 has significantly impacted the working lives of Australians, with 1 in 3 transitioning to working from home

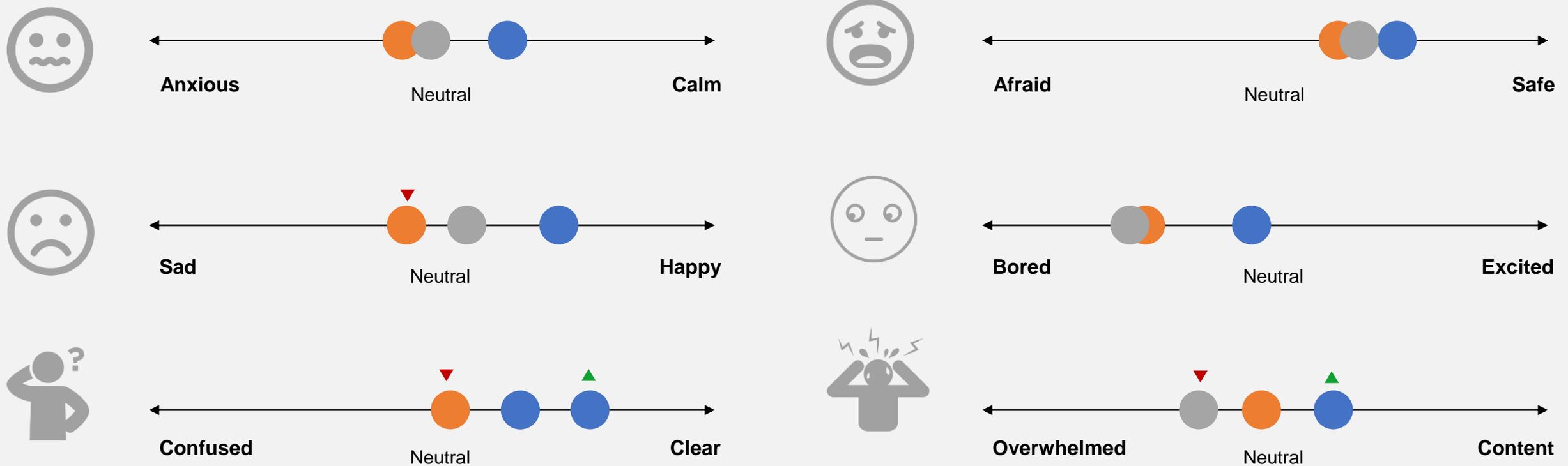


**1 in 3**  
workers have now  
transitioned to  
working from home



# Those who have continued at their regular workplace feel higher levels of clarity and contentment

● I normally work in an office/workplace, but have transitioned to working from home
 ● I have continued working at my regular workplace
 ● I have discontinued working as a result of COVID-19



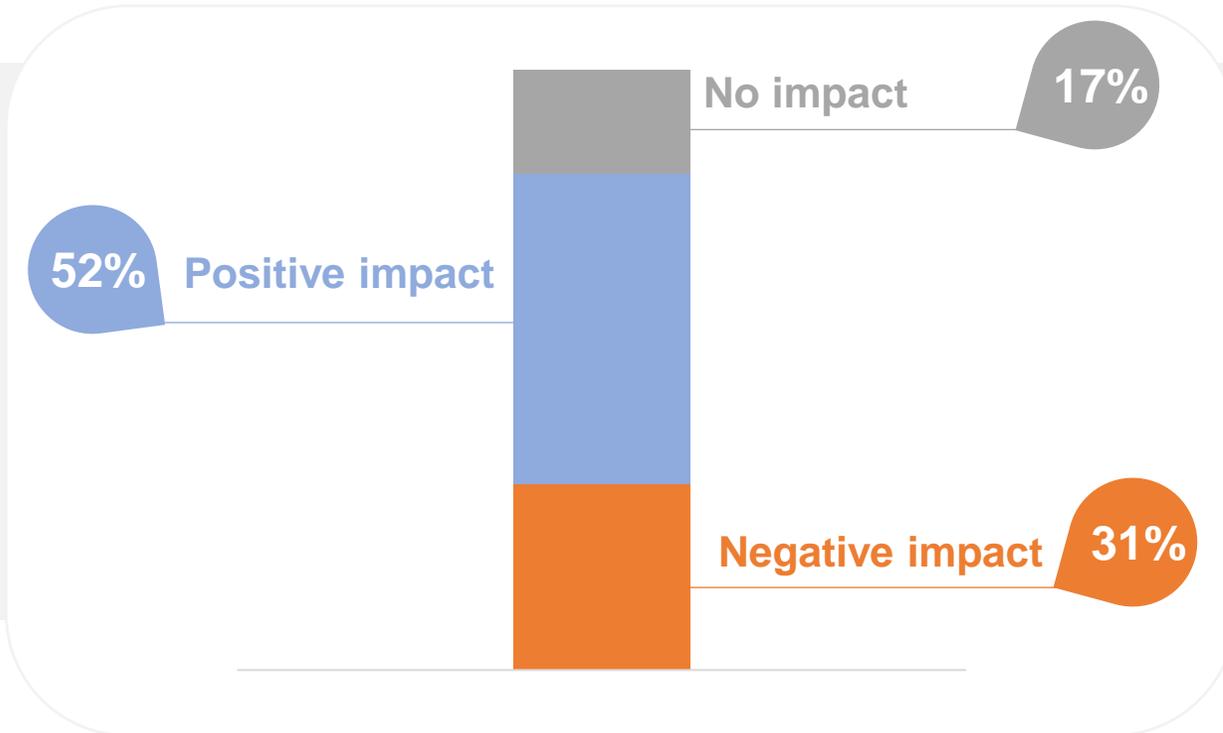
Q. B1. To start with, how are you feeling right now?  
Base: n=400

▲▼ Sig. difference at 95% confidence between groups

# Whilst the transition to WFH has been more positive than negative overall, its effects on wellbeing and enjoyment have been mixed

## THE IMPACT WORKING FROM HOME ON MENTAL HEALTH

### Impact of that WFH has on Mental Health



### % who have enjoyed the changes to their role due to COVID-19



Although **1 in 3** (34%) of those working from home **have enjoyed the changes to their role**, there is still a substantial portion of people (26%) who have **not enjoyed the changes and indicate a negative emotional impact**

Q. H1. First up, have any of the below had an impact on your mental health since the COVID-19 outbreak began? C9. When it comes to your work life, how strongly do you agree / disagree with each of the below?

Base: Those who normally work in an office / workplace but have transitioned to WFH n=89. Question asked 27<sup>th</sup> April – 30<sup>th</sup> April, 2020

# 1 in 2 “can’t wait” to get back to the office, but many will be seeking greater flexibility when things return to “normal”

## ATTITUDES ON THE RETURN TO “NORMAL”

% Agree / Strongly Agree

68%

I think I'll be able to work more flexibly when things go back to normal

39%

Think they'll be working from home more when things go back to normal

Equally however, 39% don't think they will be working from home more when things are back to normal

50%

I can't wait to go back to the office



**Workplaces are doing a great job at supporting their employees, but more could be done**

# Most working Australians are feeling well supported by their workplaces during this period of uncertainty



OVERALL...



78%

feel at least **somewhat supported** by their workplace

HOWEVER...

17%

of those who have continued at their **current workplace AND**

...do not feel supported at all

8%

of those who have **transitioned to working from home...**

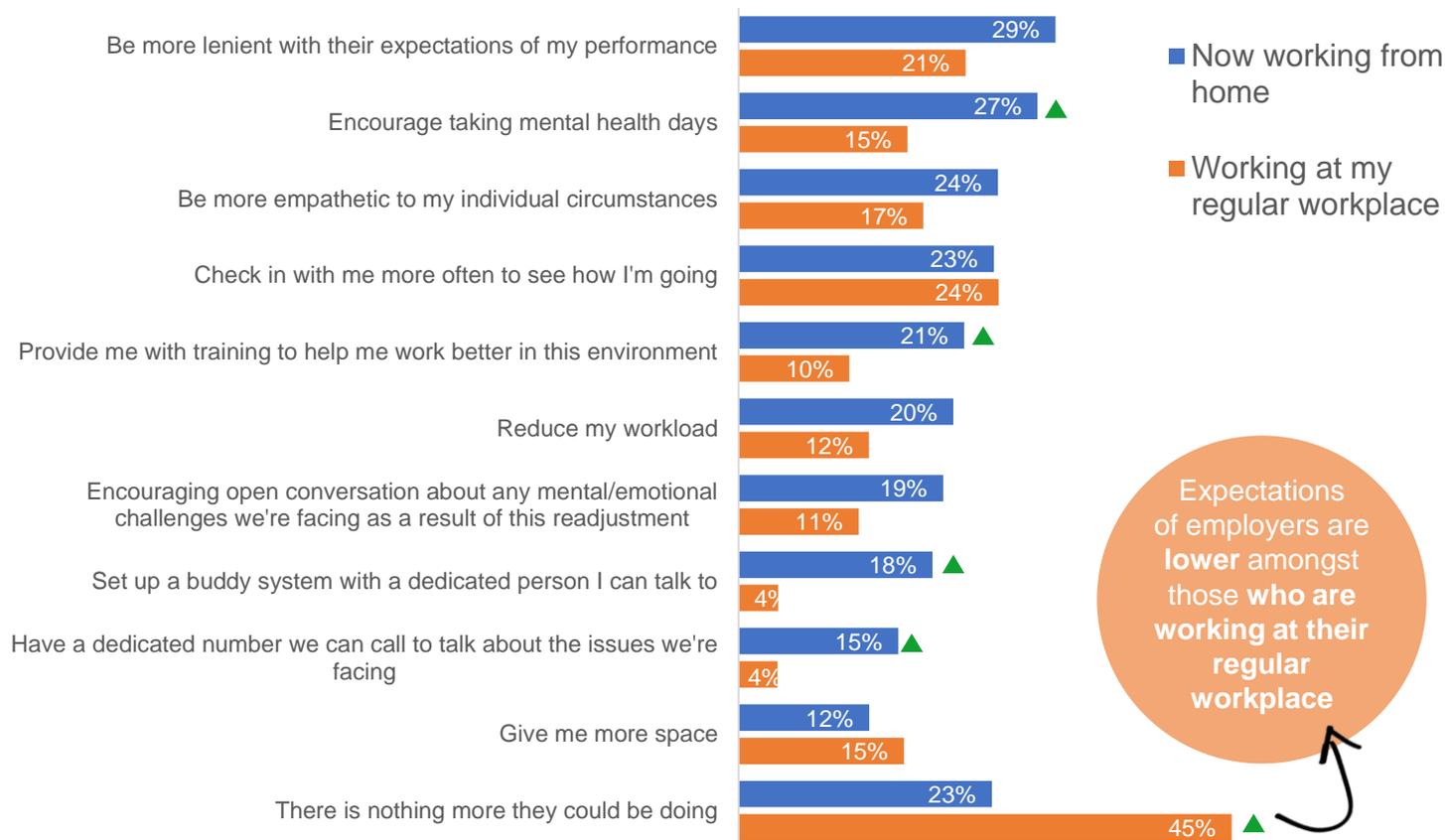
## What this means for employers

With almost 1 in 5 of those still working at their workplace not feeling supported at all, companies should ensure they're keeping attuned to the needs **of employees for whom it's 'business as usual' (BAU).**

Whilst their work lives haven't been as obviously disrupted, the unprecedented impact on other aspects of employees' lives may warrant additional support.

# Nevertheless, additional leniency, empathy and mental health support is expected of employers

## EXPECATIONS OF EMPLOYEE SUPPORT



## Key focus areas

Those who are now WFH Those who are still BAU



**Be more lenient with expectations of their performance**



**Check in more often to see how they're going**

**Encourage them to take mental health days**

**Be more lenient with expectations of their performance**

**Be more empathetic to their individual circumstances**

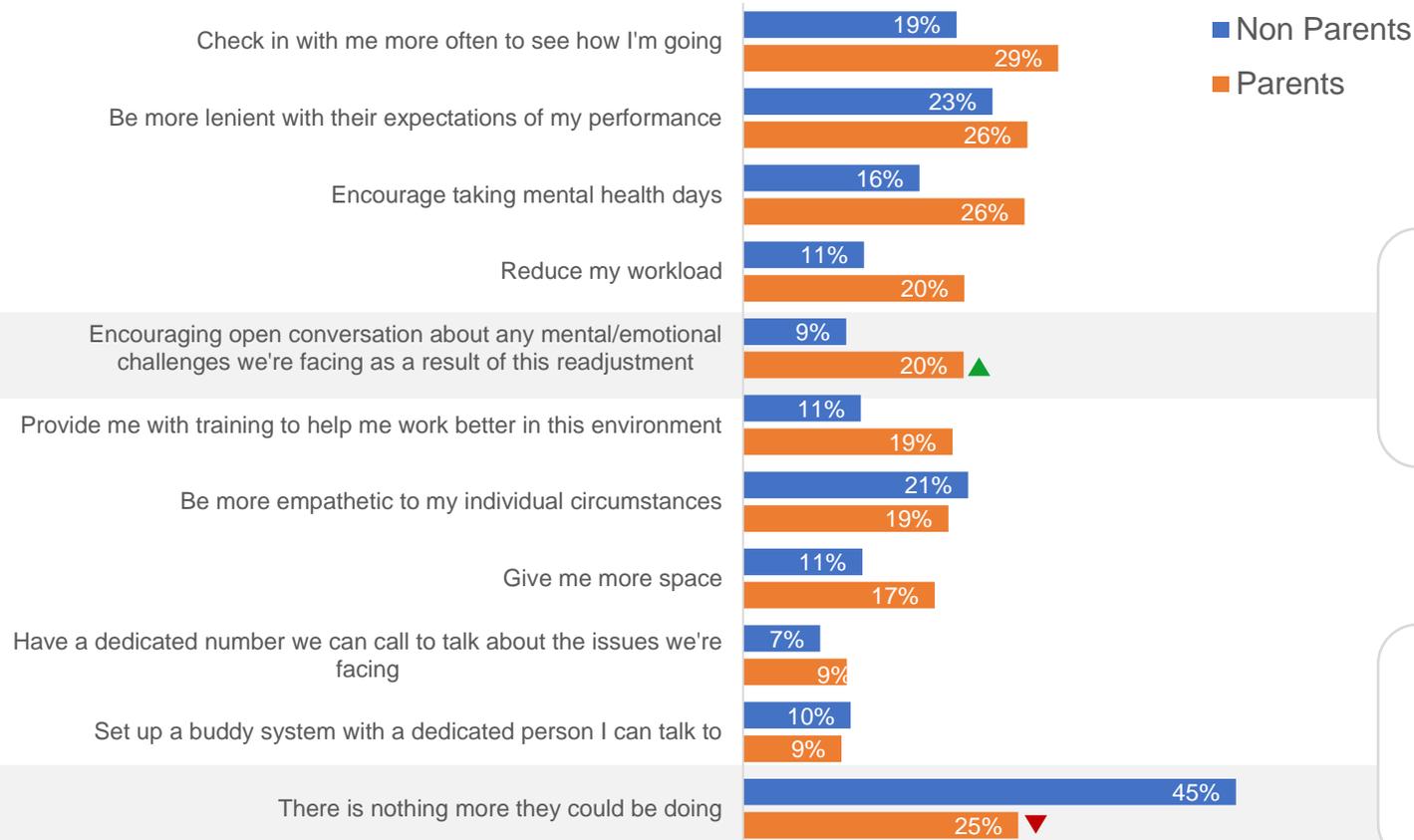
**Be more empathetic to their individual circumstances**

Q. H4. What do you want your workplace to do more of to support you through this crisis?  
 Base: Total (n=204). Those who are now WFH (n=89), those who are still working at their regular workplace (n=115). Question asked 27<sup>th</sup> April – 30<sup>th</sup> April, 2020

▲ ▼ Sig. difference at 95% confidence between groups

# Parents are feeling the pressure more so than non-parents and are ultimately seeking more employee support as a result

## EXPECATIONS OF EMPLOYEE SUPPORT



Parents are seeking more open conversations with their employer around the challenges created by COVID-19.

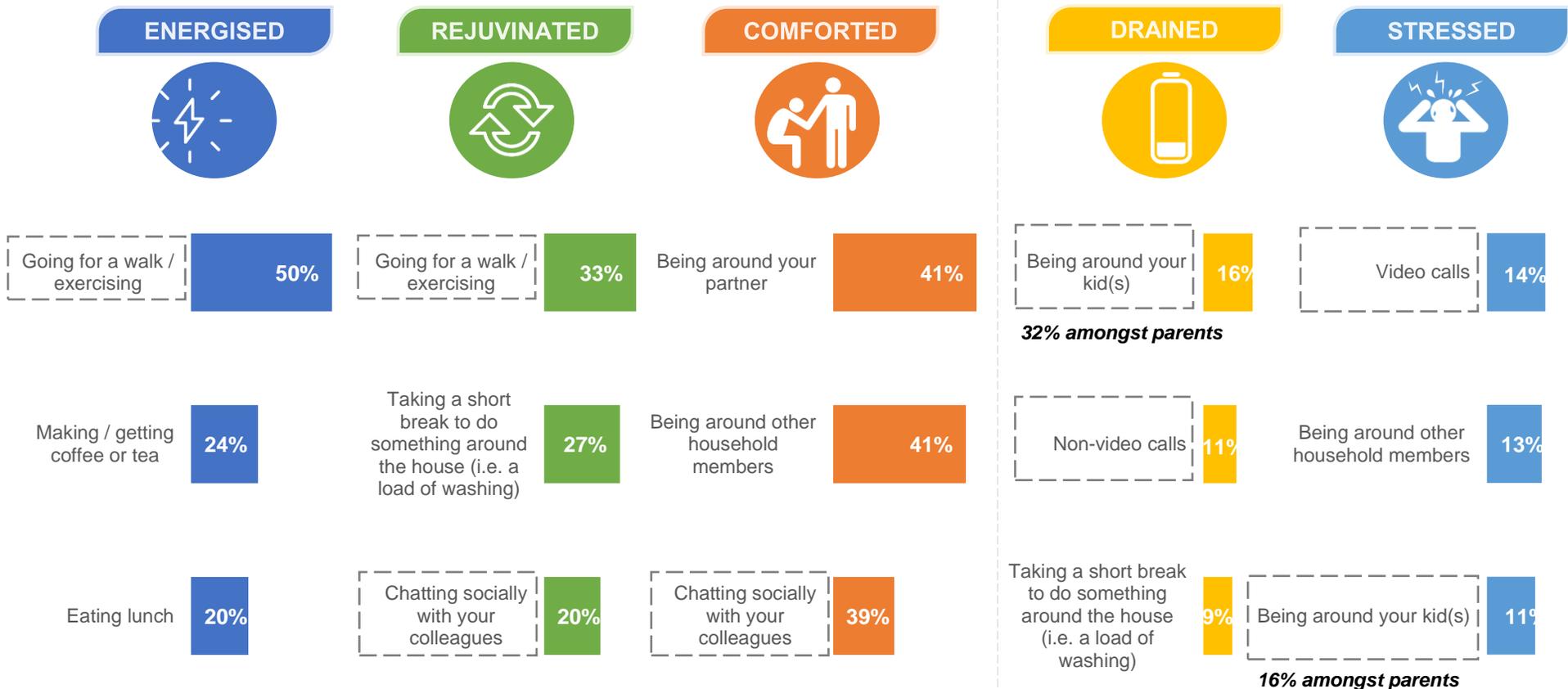
With just 25% of parents saying their employer is doing everything they could be, there's a strong desire for workplace extras to be prioritised for those with kids.

Q. H4. What do you want your workplace to do more of to support you through this crisis?  
Base: Parents (n=93), those without kids (n=111). Question asked 27<sup>th</sup> April – 30<sup>th</sup> April, 2020

▲▼ Sig. difference at 95% confidence between groups

# Exercise should be encouraged by companies to safeguard employees' mental wellbeing and improve productivity

## EMOTIONAL IMPACT OF ACTIVITIES DURING THE WORKDAY (amongst those WFH)

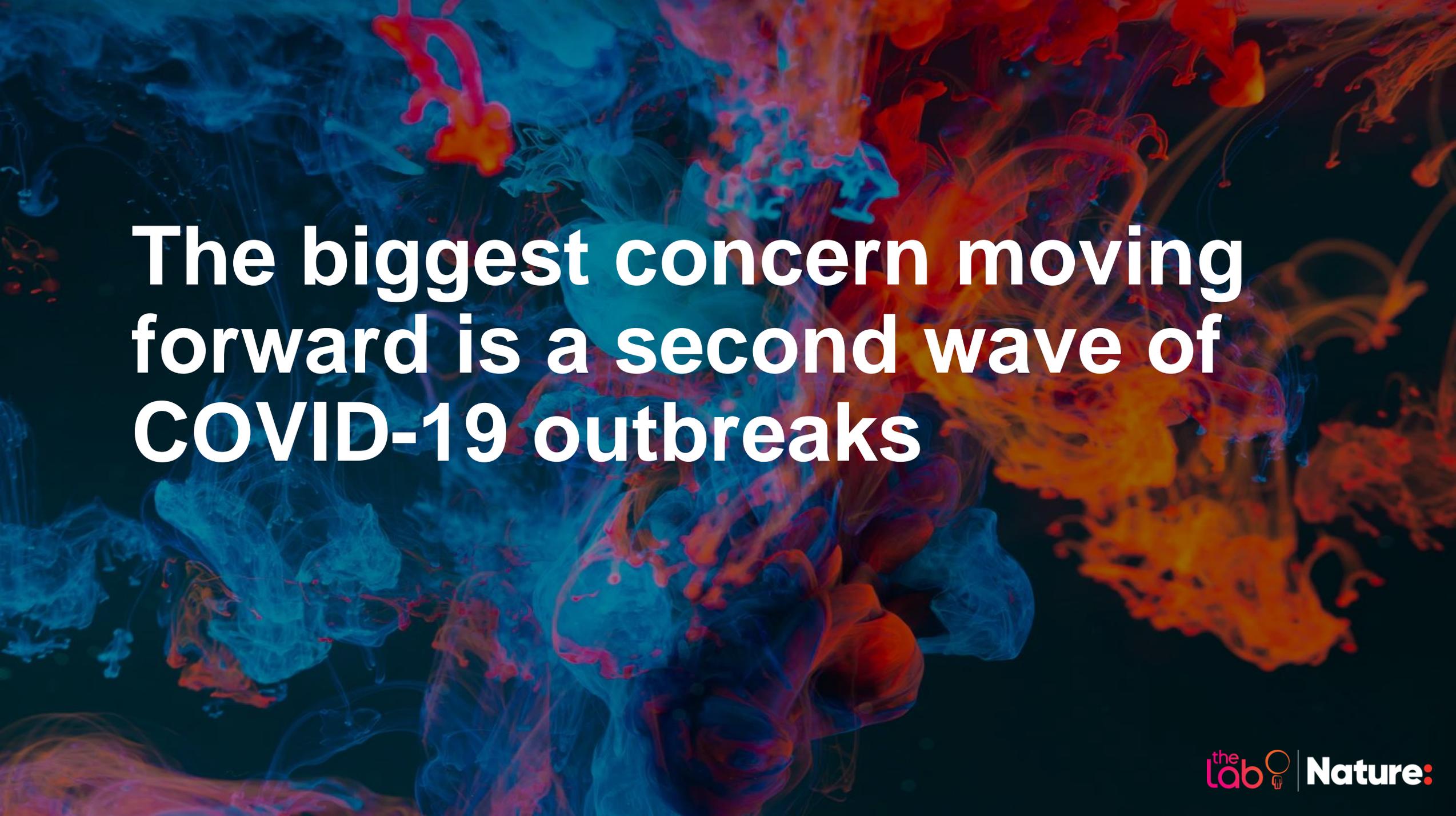


## Key focus areas

Going for walks/ exercising and socialising with colleagues are highly important in rejuvenating, energising and comforting employees to **protect** against poor mental health and enhance productivity.

On the other hand, the rising prevalence of **video calls** as well as **caring for kids during working hours** is bringing stress and strain into the day. Whilst not entirely avoidable, employers should make efforts to be conscious of the emotional impact of these activities.

Q. H5. How do each of the below activities make you feel throughout your workday?  
Base: Those who are now working from home n=89. Question asked 27<sup>th</sup> April – 30<sup>th</sup> April, 2020

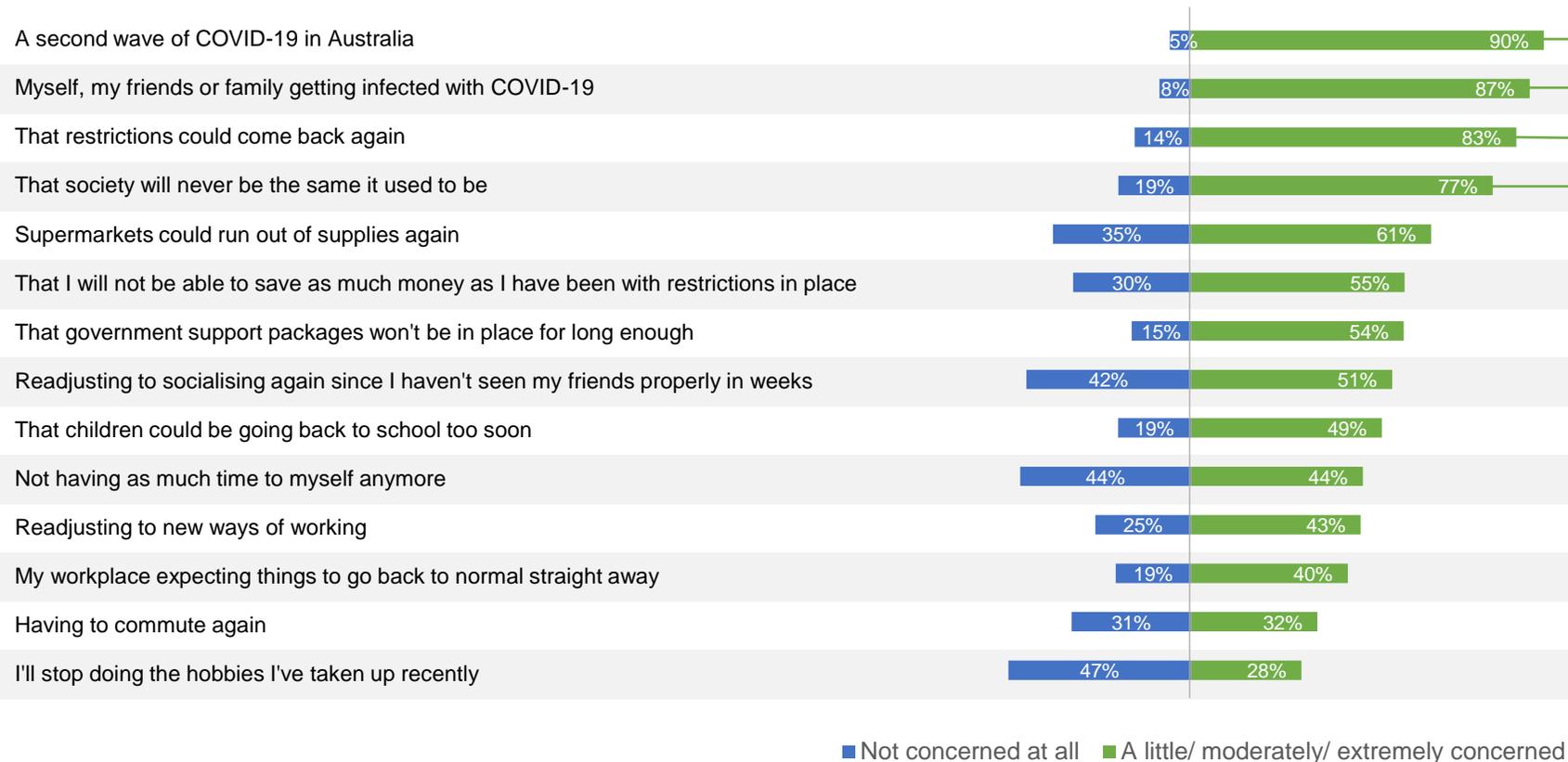


**The biggest concern moving forward is a second wave of COVID-19 outbreaks**



# The risk of infection, re-implementation of restrictions and fears over never returning to “normal” are other primary concerns

## FUTURE CONCERNS AS RESTRICTIONS BEGIN TO BE LIFTED



In addition to fears over a second wave of COVID-19 and renewed restrictions, Australians are **highly concerned that those close to them may catch the virus** and are **worried that society may never return to how things used to be**

- What aren't Australians as concerned about?**
- That they'll stop doing their new **hobbies**
  - That they won't have as much **time to themselves**
  - Readjusting to **socializing**
  - Supermarket **supplies** running out

H6a. Including anything you may have mentioned previously, as restrictions begin to be lifted, how concerned are you about each of the below? Base: n=200  
Base: n=200. Question asked 30<sup>th</sup> April, 2020

# COVID-19 BRAND NAVIGATOR



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# Appendix:

Question	Time Period Reported	Total Base Size
A4. Top 3 important areas of life	27 <sup>th</sup> of March to the 30 <sup>th</sup> of April (excl. 2 <sup>nd</sup> April)	n=3,100
B11. Attitudes & B1. feelings	27 <sup>th</sup> of March to the 30 <sup>th</sup> of April	n=3,300
C2. Change in behaviours	27 <sup>th</sup> of March to the 29 <sup>th</sup> of March	n=1,000
C1. Change in media habits	27 <sup>th</sup> of March to the 30 <sup>th</sup> of April	n=1,400
C6. Openness to Telehealth	16 <sup>th</sup> of April to the 20 <sup>th</sup> of April	n=700
H1. Mental health impact	27 <sup>th</sup> of April to the 30 <sup>th</sup> of April	n=400
H2-H4. Workplace support	27 <sup>th</sup> of April to the 30 <sup>th</sup> of April	n=204
H5. Emotional impact	27 <sup>th</sup> of April to the 30 <sup>th</sup> of April	n=204
H6. Future Concerns	30 <sup>th</sup> of April	n=200