

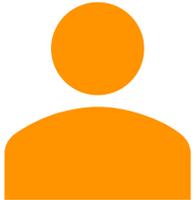


COVID-19 BRAND NAVIGATOR

Real-time insights into the rapidly evolving landscape.

State of the Nation report
2 April

A reminder of our approach



WHO

Quantitative

- 1,000 people
- Nationally representative of Australians over the age of 16

Qualitative

- 180 people
- General Population

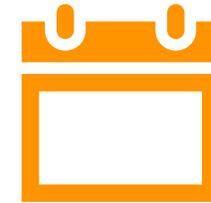


WHAT

20 minute online survey

+
Big Qual. An AI-enabled online discussion using crowd intelligence to generate support statistics

+
Online social media and news analysis from the past 2 weeks from w/c 9th March



WHEN

Quantitative

- Friday 27th – Sunday 29th March, 2020

Qualitative

- w/c 9th March onwards

Key learnings

1

Australians are concerned and the majority believe it will be at least 6 months before things return to normal. There are signs this is taking a toll on mental health, but some are starting to see a silver lining.

SO WHAT

Provide guidance and advice on what people can do to deal with feeling isolated and alone. Consider the small things that might brighten up someone's day.

2

While we've seen improvements in the last week, there is a sense the Government could be doing more.

SO WHAT

There is an opportunity for brands to provide people with the leadership they desire. Encourage people to follow social distancing guidelines, and demonstrate how you're also complying with these as a company.

3

Undeniably this pandemic is changing the way consumers think, feel and act, in all aspects of their lives and across industries. This situation is rapidly evolving and it is more important than ever to listen and understand your customers.

SO WHAT

Whilst it can be overwhelming keeping up to date with constantly updated information, brands who stay the closest to their customers during this period have the most to gain.

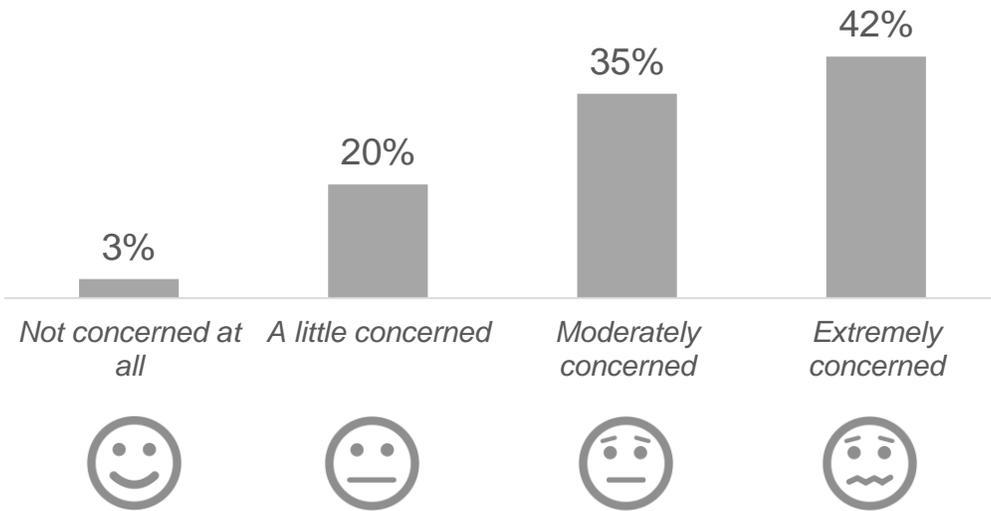


How are Australians feeling about COVID-19?

The majority of Australians are concerned by the COVID-19 outbreak

CONCERN ABOUT COVID-19

At least a little concerned: 97%



“The global impact that this virus will have on so many people. I think it will take a long time for it to really pass but there will be ramifications for long beyond.”



“I guess for my mental health overall it is not good to be constantly at home. I also worry when this will get better because I want to go back and visit my family.”



“I am getting confused about the exact condition being spread over the world. Is COVID-19 is such a dangerous virus? why can't our scientists find a vaccine for that?”

We see anxiety about COVID-19 play out in a number of ways

Fear of exposure to the virus is having a massive emotional toll



"I have two small children and didn't sleep a wink last night because my house was filled with builders, so spent a lot of the night disinfecting every door handle and door frame"

- Female, 38, Melbourne

A feeling that things are going to get worse before they get better



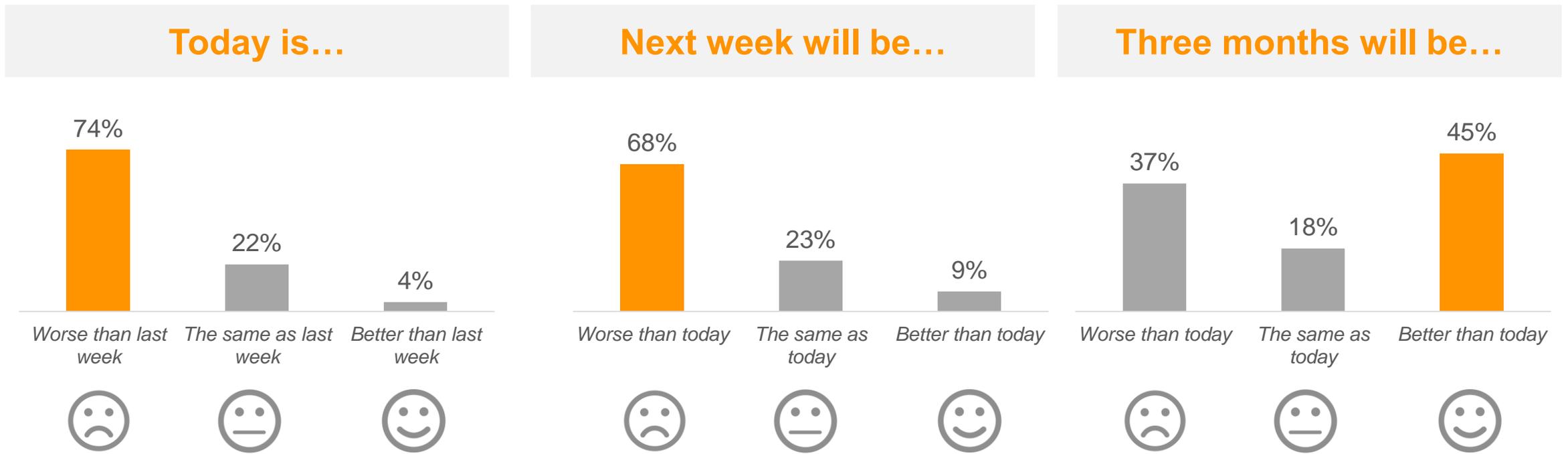
"Things will be different, I think things are going to get very difficult very quickly. This is a honeymoon period and I don't see how it will play out but it's definitely going to get a lot worse than this"

- Female, 45, Melbourne



Few feel things are going to get better soon, with fewer than half thinking things will be better in 3 months

EXPECTATIONS OF THE PANDEMIC



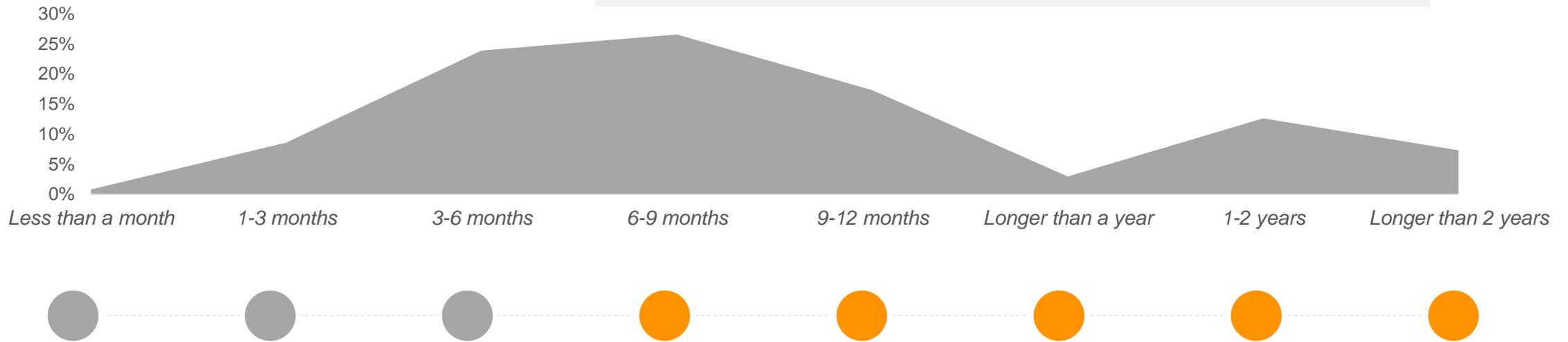
Q. Thinking about the entire COVID-19 situation (including its impact on health, economy, society, social distancing etc.), compared to this time last week, how do you feel the situation (is today / will be next week / will be in three months)?
Base: n=1000

In fact, most believe it will take at least 6 months before things return to normal

EXPECTED TIME TO RETURN TO NORMAL

I think things will return to normal in...

6-9 months or longer: 67%

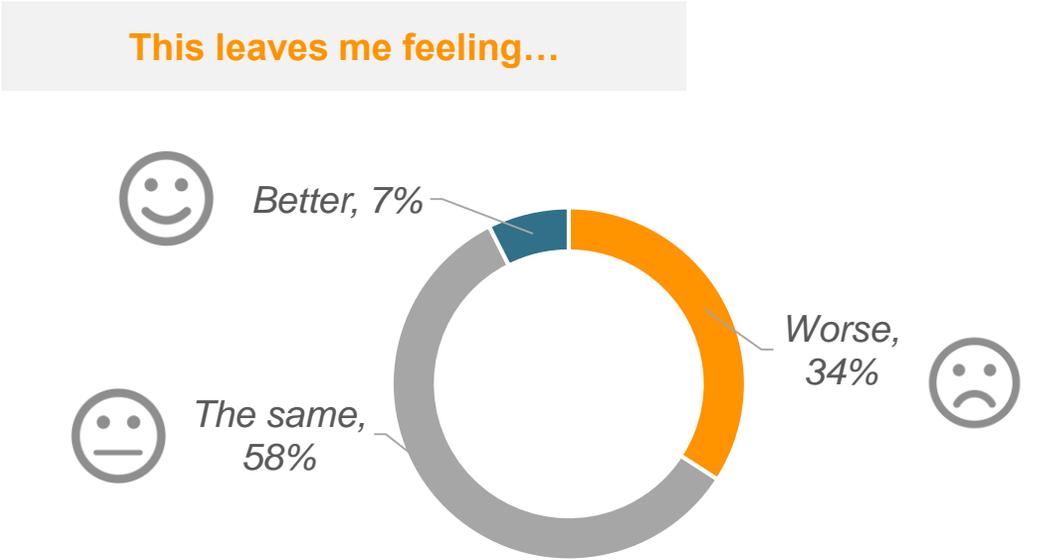
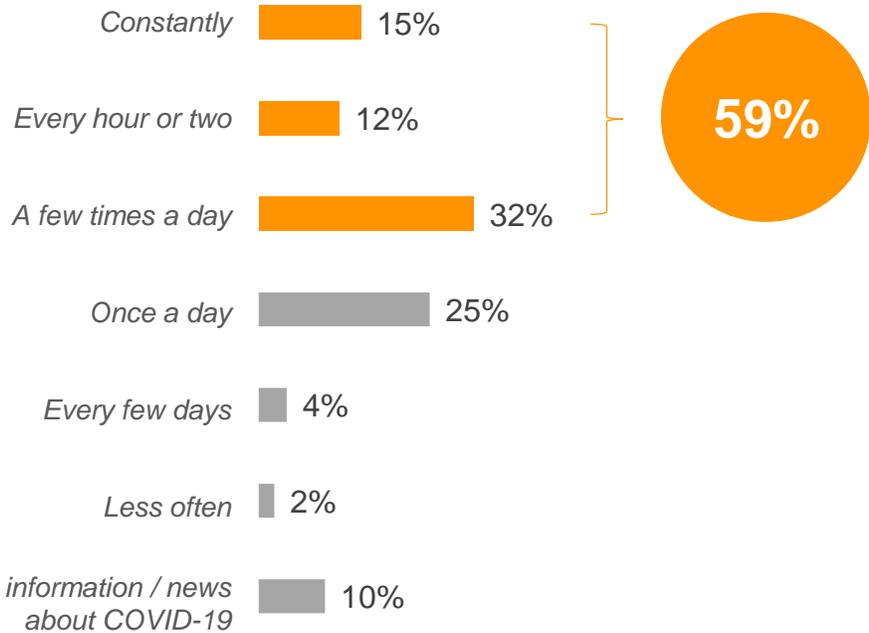


Q. And when do you think things will return to normal?
Base: n=1000

We're looking for updates frequently, but this leaves some feeling worse as a result

FREQUENCY OF UPDATES

Actively looking for information on COVID-19



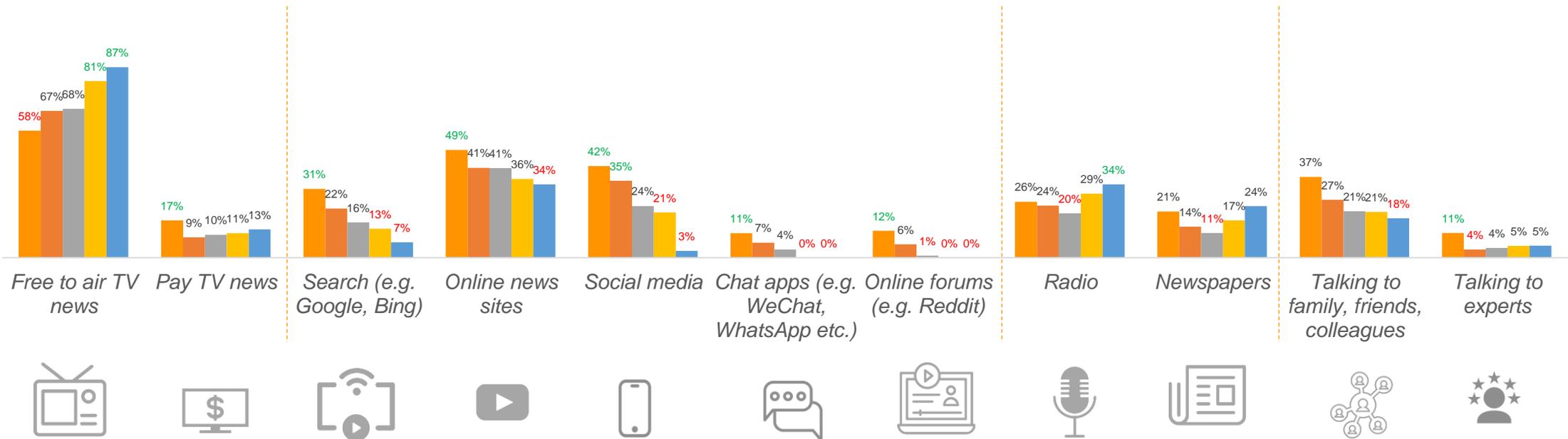
Q. How often do you actively look for information or news about COVID-19? How do you typically feel after watching the news?
Base: n=1000

We're using a wide range of sources, with free to air TV most popular across age groups

SOURCE OF COVID-19 INFORMATION

Most useful sources by age

16-34 35-44 45-54 55-64 65+



Significantly *higher* / *lower* than other groups at 95% confidence

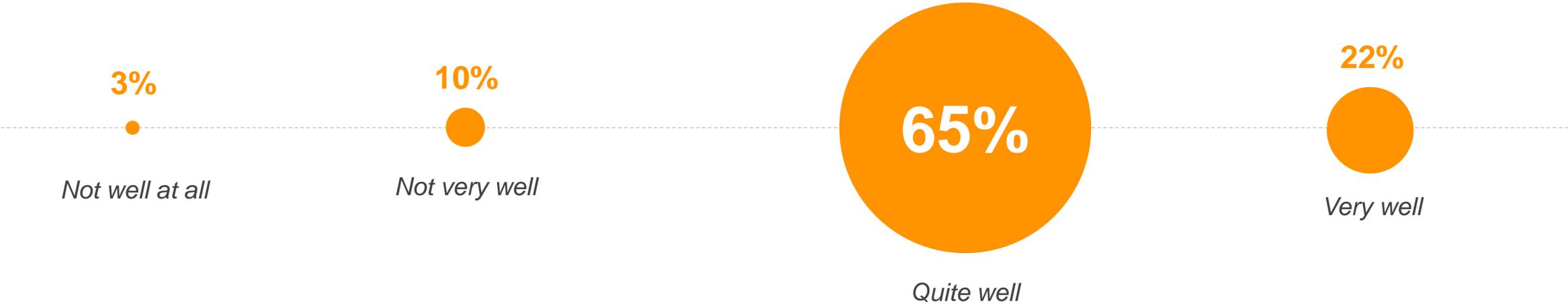
Q. How often do you actively look for information or news about COVID-19? How do you typically feel after watching the news?

Base: 16-34 (n=341), 35-44 (n=189), 45-54 (n=182), 55-64 (n=153), 65+ (n=135)

From the information people have gathered, most say they understand the current situation quite well

KNOWLEDGE ABOUT COVID-19

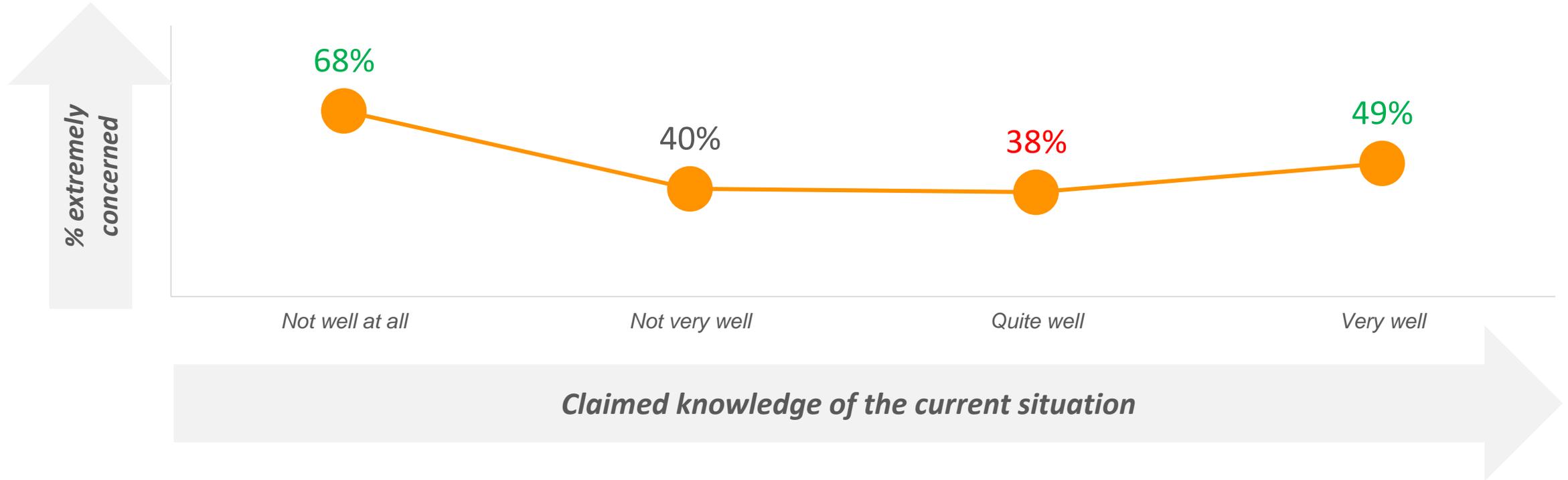
I feel I understand the current situation...



Q. How well do you feel you understand the current situation and everything that's going on?
Base: Total (n=1000)

Whilst some knowledge helps relieve concern, too much knowledge can become worrisome

IMPACT OF KNOWLEDGE ON OVERALL CONCERN



Significantly higher / lower than other groups at 95% confidence

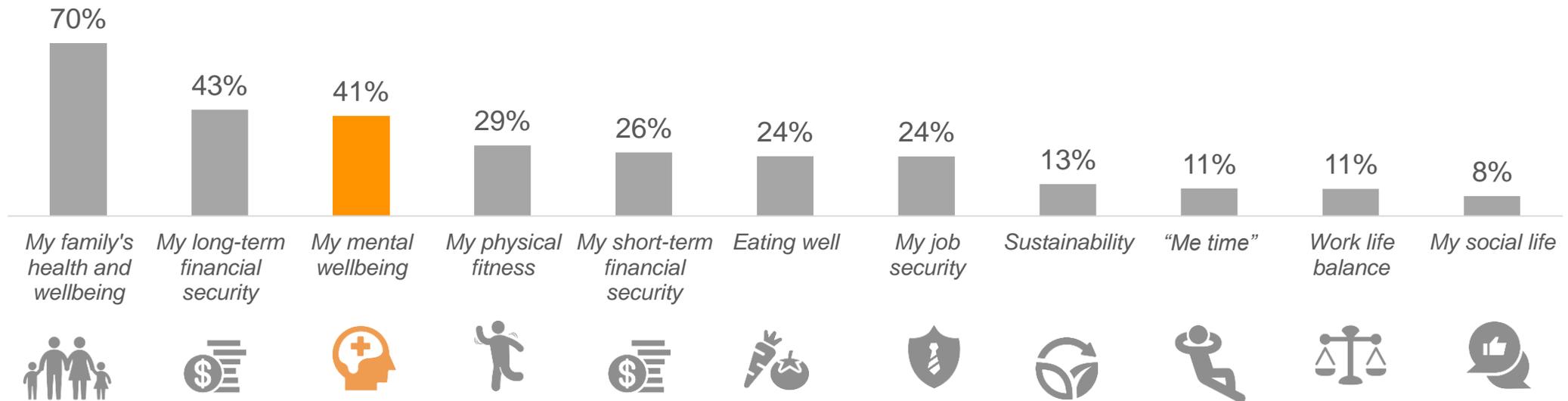
Q. What is your overall level of concern about COVID-19? Q. How well do you feel you understand the current situation and everything that's going on?

Base: Not well at all (n=26), Not very well (n=109), Quite well (n=644), Very well (n=221)

Mental wellbeing is incredibly important to Australians at present

IMPORTANT AREAS OF LIFE

Rated as top 3 most important right now...

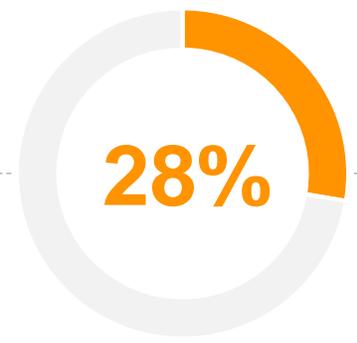
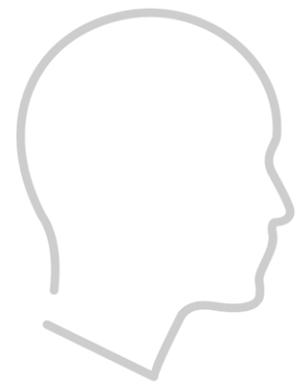


Q. Of the following, which are the three most important to you right now?
Base: Total (n=1000)

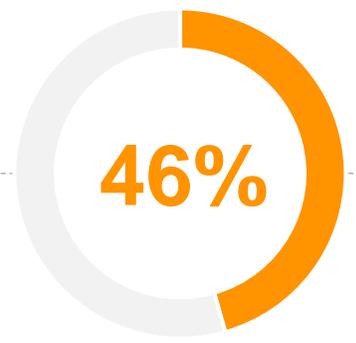
The impact of COVID-19 on Australians' mental health is substantial

MENTAL HEALTH

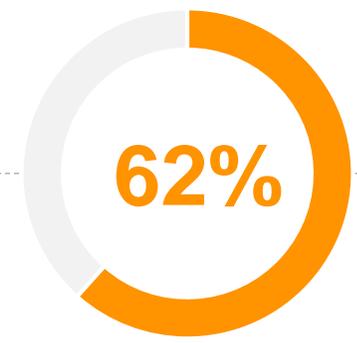
% Agree / Strongly Agree



I feel isolated and alone



I am putting on a brave face but privately I am really worried



I am looking for something every day to stay positive



Q. How strongly do you agree / disagree with each of the below?
Base: n=1000

In people's own words, they can get trapped in a 'downwards spiral' and are just trying to 'stay sane'

Uncertainty around the crisis is exacerbating feelings of anxiety



"I am feeling really scared and anxious and I'm constantly thinking about it and there's so much unknown, we don't know how long this will last. I'm trying not to feed those fears and get into a downward spiral but it's hard keeping it altogether"

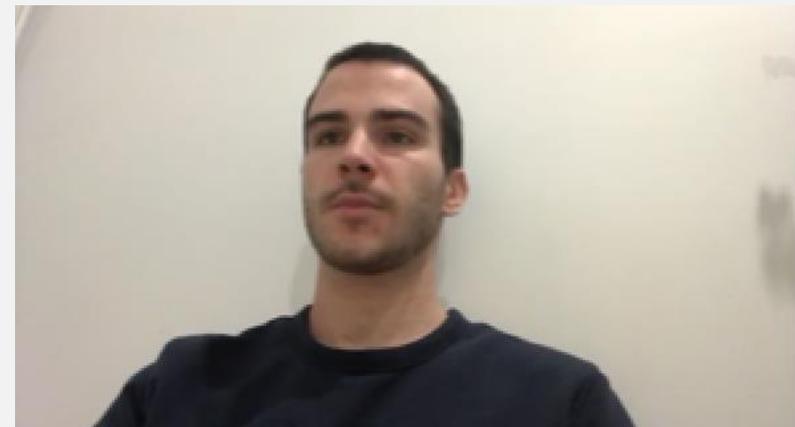
- Female, 45, Newcastle

Self-isolating means people are missing human contact with family and friends



"I got over it and sick of it yesterday, I was focussing on all the negatives of it all and was feeling really depressed so today I tried to do something I'm not very good at and cook and was looking for things that stretched me a bit and that really helped being engaged mentally. I'm missing catching up with my family and friends and ruminating on how awful this situation is and I need to distract myself to stay sane"

- Male, 23, Melbourne



Some feel it is every individual for themselves

Socialism vs Individualism

% Agree / Strongly Agree

22%



In times like these it's every person for themselves

72%



Prioritising myself/my family is the most important thing

Q. How strongly do you agree / disagree with each of the below?
Base: n=1000

Individualism can be driven by a fear of missing out

The fear of missing out and not being able to access services is felt to be bringing out the worst in some people



"My daughter's report about utter panic in a nearby nail shop today was appalling. No, it's not a terrorist attack, no, it's not due to a tragic accident, it's just women at a local nail shop panicking to have whatever on their nails removed. Some of the women's behaviour was absolutely appalling, refusing to wait their turn, pushing and shoving and yelling at staff"

- Male, 71, Melbourne

While some are being individualistic many of us are trying to balance our needs with those of the community



"Today we have made a list of the things we are going to bake and will give some to our elderly neighbours."

- Female, 45 Melbourne



I am surprised that I feel like I am one of the only ones keeping up my end of the deal for my community by staying at home."

- Female32 Melbourne



Whilst most Australians think hoarders should stop, a large portion are hoarding themselves

GROCERIES

Many Australians are well stocked up...

89%

think that
Hoarders of food
and essentials
need to stop

NET of Strongly agree / agree

43%

of Australians
have more
supplies than
usual

NET of Much more, Slightly more

57%

of Australians
have 2 weeks or
more of supplies

Despite Aussies' current efforts, we may not be doing enough to "flatten the curve" long term

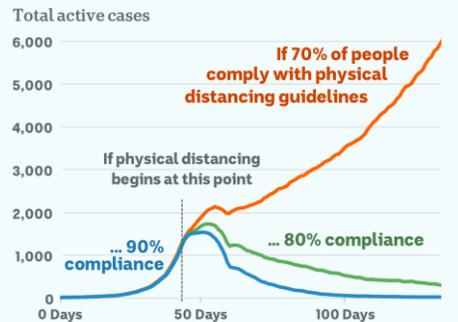
IMPACT OF SOCIAL DISTANCING

Intention to comply with social distancing guidelines



How every single Australian's actions affect the spread of coronavirus

To effectively slow the spread of coronavirus, the vast majority of people will need to cut out nearly all their in-person social interactions, new University of Sydney modelling shows. That's on top of existing measures like travel restrictions.



Data source: University of Sydney. Chart: ABC News Story Lab



Only 63%

Strongly agree that they *intend to comply with as many social distancing guidelines as possible*

If this holds true, **Australia is on track to follow the orange line from UNSW modelling** and only experience a temporary "flattening of the curve"

Q. Thinking about the entire COVID-19 situation (including its impact on health, economy, society, social distancing etc.), compared to this time last week, how do you feel the situation (is today / will be this time next week / will be in three months) ?

Base: n=1000

And whilst the community can do its part to fight COVID-19, many feel the Government could be doing more

Opinions about the Australian Government

% Agree / Strongly Agree



Australian Government

Only 1 in 2

Have confidence in the Government's ability to handle this crisis (50%)

1 in 2

The Government could do more to inform the public (56%)

The Government has been sending mixed messages that are confusing for the public (59%)

While new Government measures were announced this week and Aussies responded positively, there is still an opportunity for more

DEVELOPMENTS THIS WEEK

1



2



CHANGES IN ATTITUDES

March 30th vs March 27th-29th

+4%_{pts}



I have **confidence in the Government's ability to handle this crisis** (54%)

-9%_{pts} ▼

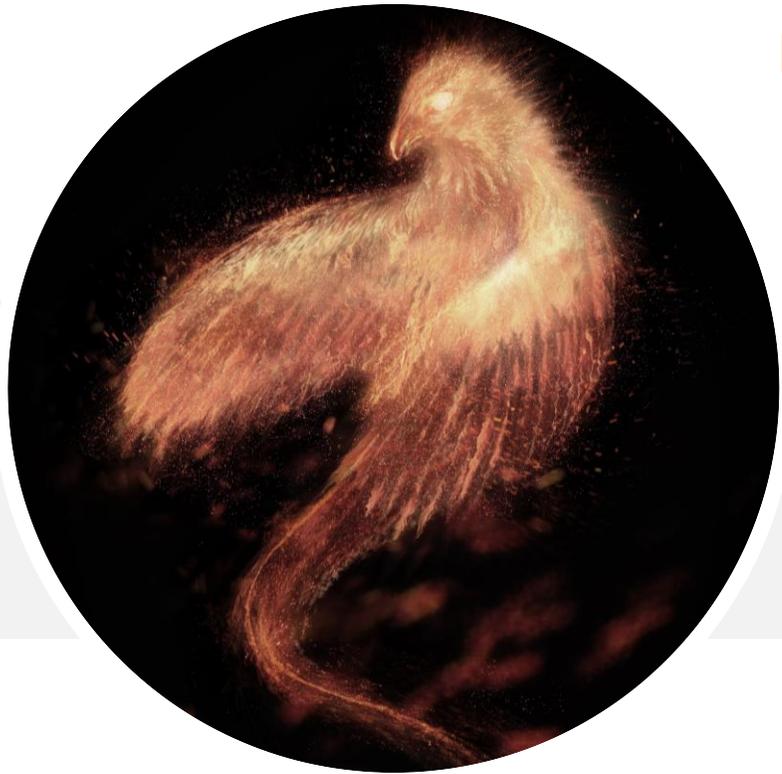


The Government has been sending mixed messages that are confusing for the public (50%)

But Australians are optimistic – many think we will all be stronger once we make it out the other side

7 in 10

Agree that we will get through this and be stronger because of it (71%)



Q. How strongly do you agree / disagree with each of the below?
Base: n=1000

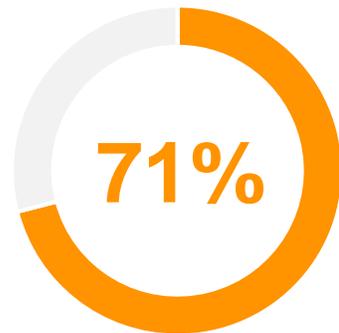
And many of us are on board to help the community and band together to fight the Pandemic

Socialism vs Individualism

% Agree / Strongly Agree



Care and Consideration for others has never been more important



People putting themselves first in times like this is **un-Australian**

Q. How strongly do you agree / disagree with each of the below?
Base: n=1000

People are rallying, determined to see the positive side

We are concerned but trying to stay positive

There is considerable concern for our mental health with many of us feeling isolated but, importantly, **Australians are an optimistic bunch...**

We are trying to find ways in our day to stay positive and seek out what makes us smile, whether that's watching comedy or cooking from scratch again to writing gratitude lists and getting out into nature.



"I made a change today and decided to work outside in the garden and I am shocked at the difference in the way I feel right now - greenery and space"

- Female, 32, Sydney



A silver lining – many are appreciating the opportunity to foster new hobbies and practice new skills



“I’ve never really baked before, so it’s a new source of domestic pride for me. I’ve been using up what we have and making banana bread”

– Female, 31, Melbourne

With more time at home, Aussies are getting stuck into those DIY or gardening jobs they had been meaning to tick off.



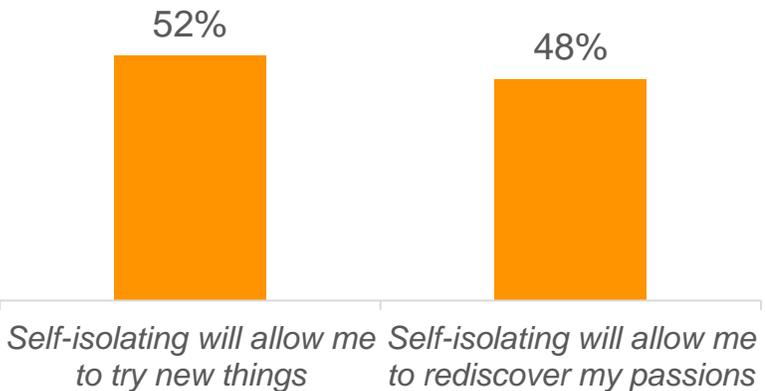
“Gardening, Gardening, Gardening! I’ve been spending the day in the garden with our little family, I’ve noticed we’ve been doing an enormous amount of gardening since all of this started. It’s going to look quite good over the next few months, we’re going to spend a lot of time out there, so lucky I like gardening!”

- Female, 39, Melbourne

Australians are rediscovering their passions – trying and buying new things

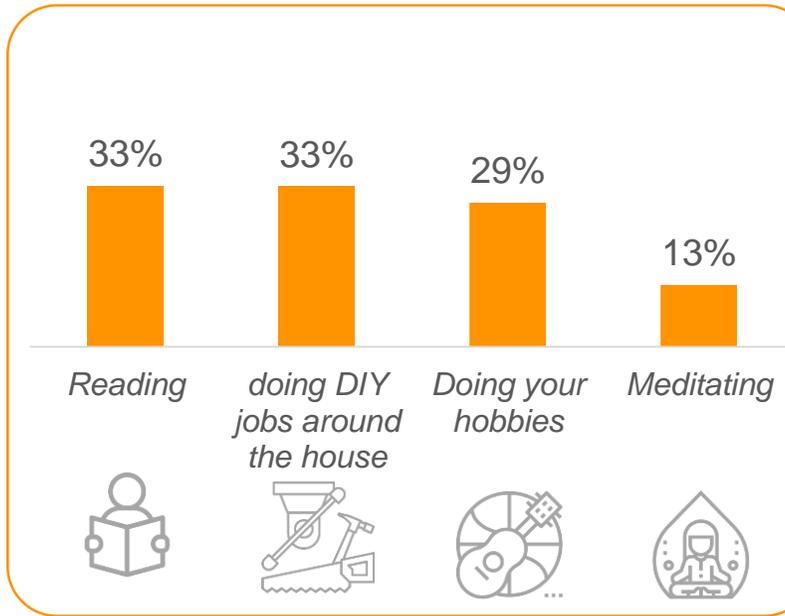
CURRENT MINDSET

Australians are...



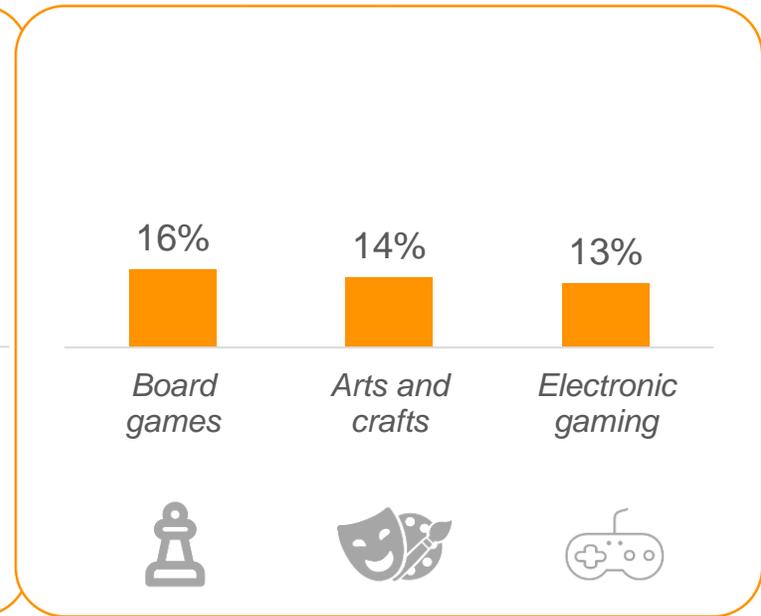
NET of Strongly, Somewhat agree

More likely to be



NET of Much, Slightly more

More likely to buy...

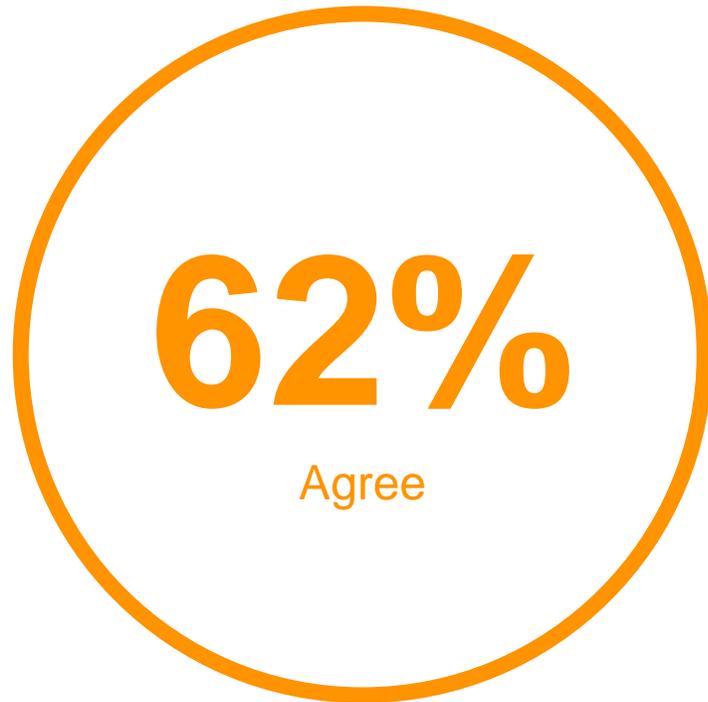


NET of Much, Slightly more likely to buy

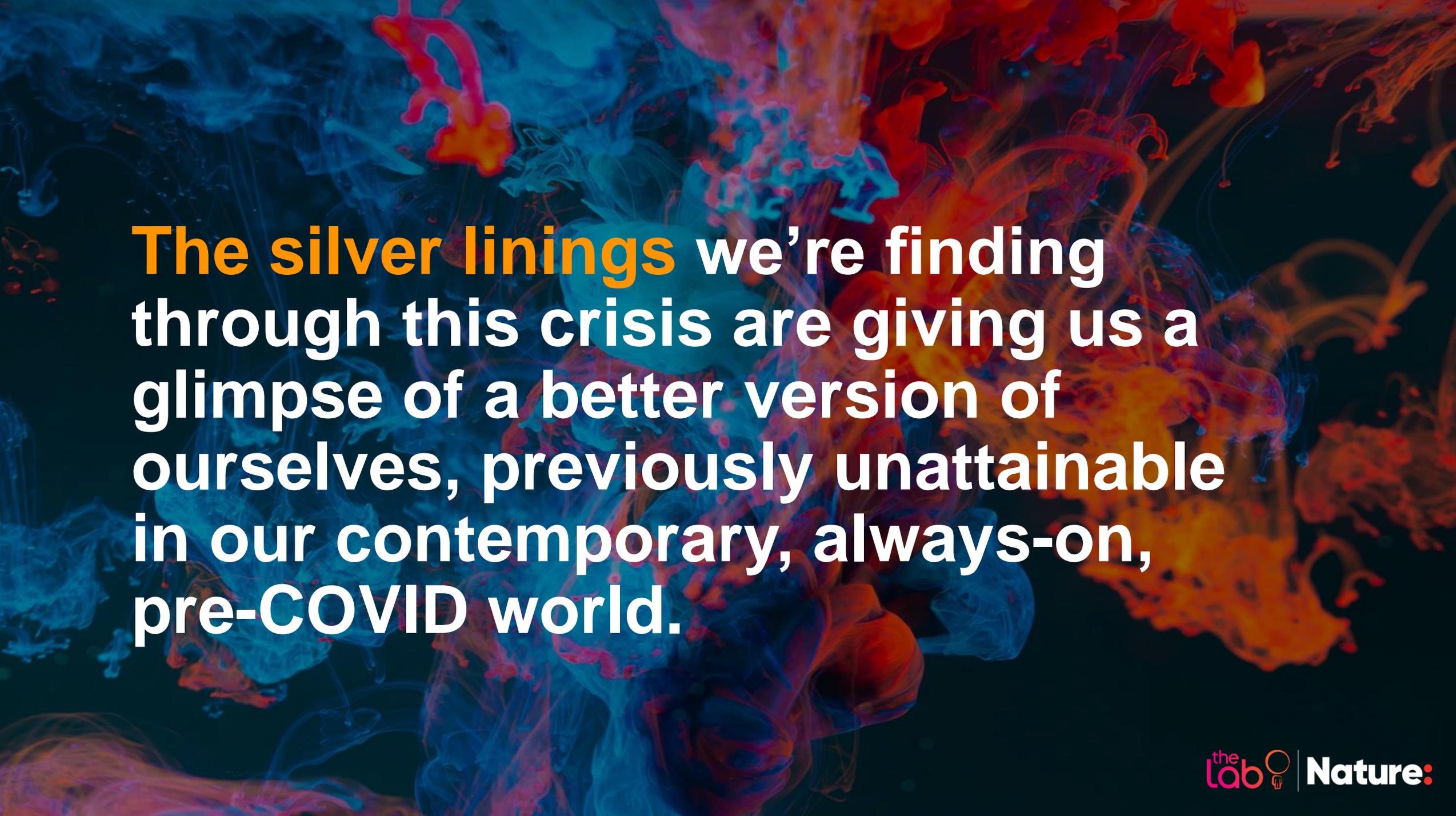
Q. How strongly do you agree / disagree with each of the below? Now thinking about each of the following, are you doing them more, less or the same as before the COVID-19 outbreak? Now thinking about the following products and services, which best describes your intentions to purchase these compared to before the outbreak (COVID-19)? Base: n=1000

Many believe this is the reset we all needed

A NEW WAY OF LIFE



“This is **the reset we needed** to re-evaluate how we were living.”



The silver linings we're finding through this crisis are giving us a glimpse of a better version of ourselves, previously unattainable in our contemporary, always-on, pre-COVID world.

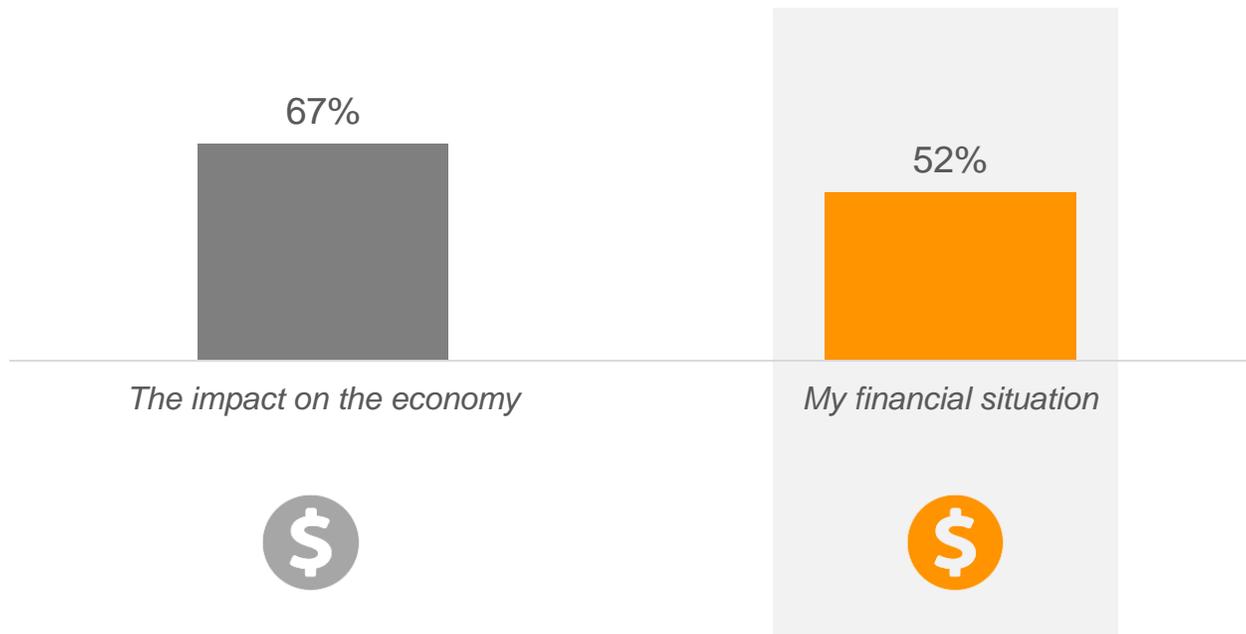
The following slides provide a snapshot of how COVID-19 is impacting behaviour when it comes to finances and grocery shopping

Finances

Two thirds are concerned about the impact of COVID-19 on the economy. Half are concerned about their personal situation.

FINANCIAL SITUATION

NET of Extremely concerned (10), (9), (8)
10-point scale



My financial situation

“Lots of challenges come. With my job, question is where does that end up? Company can pay and look after me a little I’m sure we could get through a couple of months. I love my job I want it to be there when I get back. Anything I can do to help them out as long as we help those, happy to dig in in short term.”

- Male, 35, Melbourne



54% are concerned about job security and a similar proportion are worried about their super

FINANCIAL SITUATION

54%

I'm worried about
job security

50%

I'm worried about
the impact on my
super

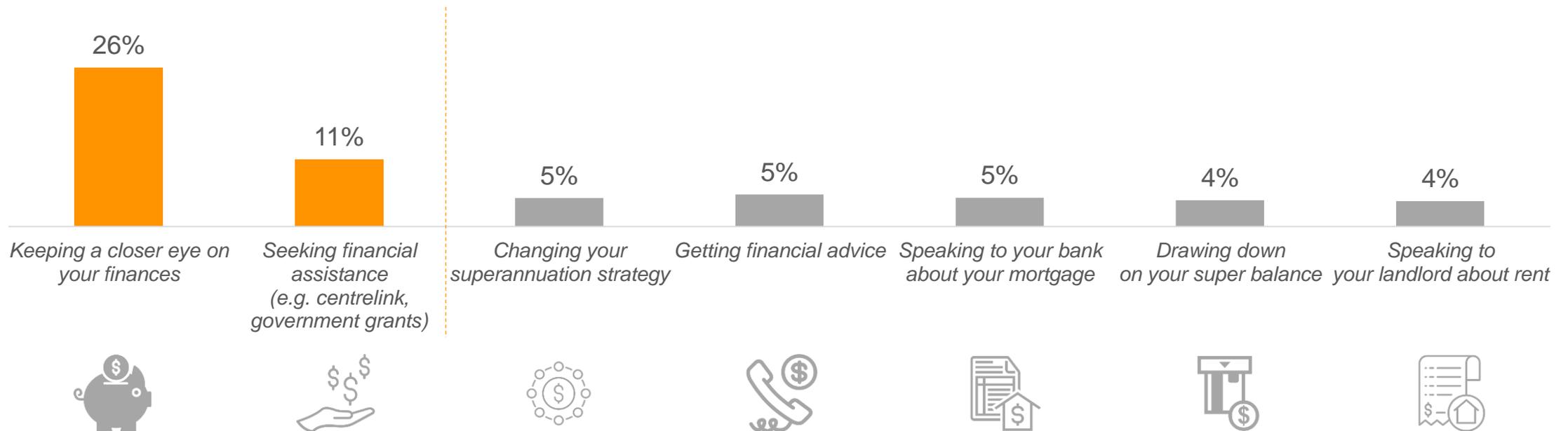
23%

I feel very secure
financially

Australians are keeping a closer eye on their finances and taking conservative action

FINANCIAL SITUATION

Any of the below actions: 37%



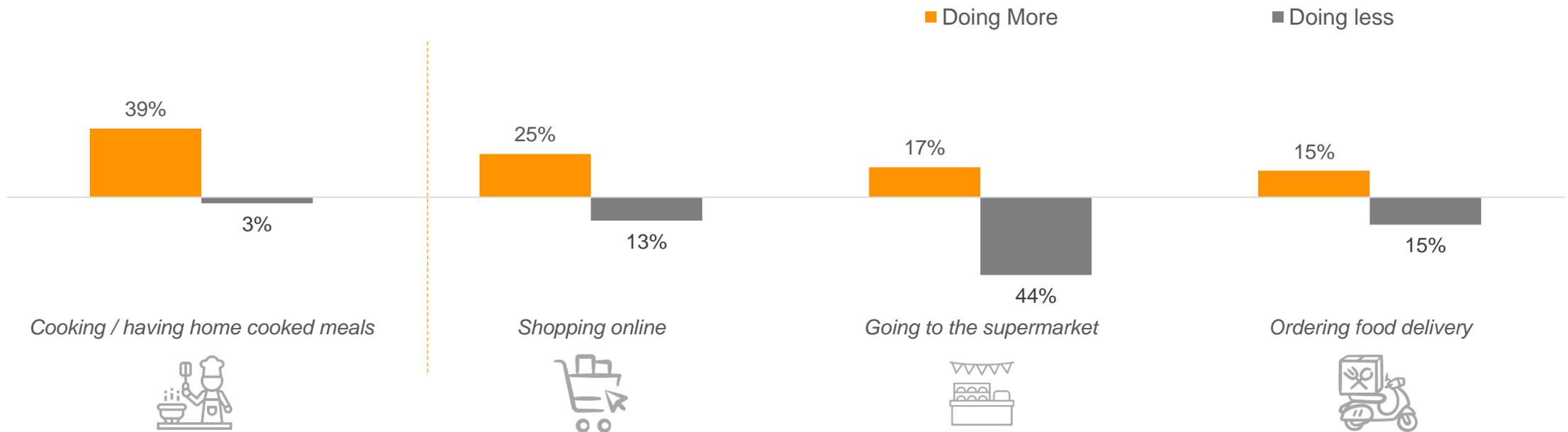
Q. How have your intentions or actions changed with these...
Base: n=1000

NET of Started, Intending to do this

Grocery Shopping

2 in 5 Australians are having more home-cooked meals despite fewer trips to the supermarket

GROCERY & MEAL HABITS



Q. Now thinking about each of the following, are you doing them more, less or the same as before the COVID-19 outbreak?
Base: n=1000

Overall, Australians think supermarkets have responded positively to COVID-19

SUPERMARKET RESPONSE

% positive spontaneous mentions



15%



15%



3%



“Managed opening hours to *support members of the community* who need it more and offered jobs to those who became unemployed.” - Woolworths



“They have *proactively made changes* before being told to by the government that *keep people safe* and allows everyone to get items such as and hour of shopping just for elderly in the morning.” - Coles



“Stock availability has been controlled as well as could be expected. They’ve been *great with social distancing*.” - Aldi

Pantry & freezer items are categories Aussies are claiming to be buying more of

CATEGORY DISRUPTION

Categories Australians are already buying more...



PANTRY ITEMS



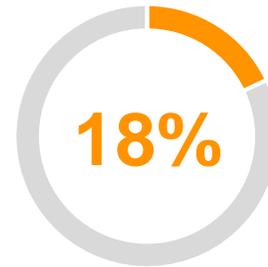
FREEZER



FRUIT AND VEG



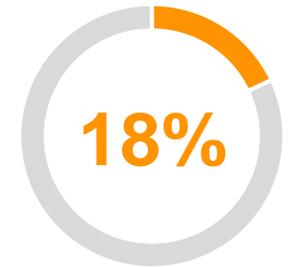
DAIRY / EGGS



MEAT & SEAFOOD



And considering...



NUTRITIONAL SUPPLEMENTS



NET of Much, Slightly more likely to buy

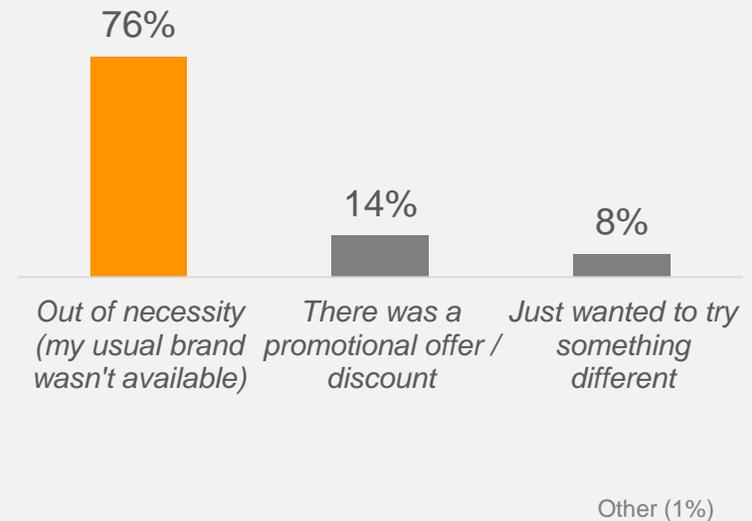
1 in 4 have tried a new brand since the outbreak – mostly because their usual wasn't available

BRAND DISRUPTION



24%

of Australians have tried a **new brand** since the outbreak



COVID-19 BRAND NAVIGATOR



Neale Cotton	0405 052 015
Andrew Therkelsen	0427 079 605
Paul Labagnara	0414 632 980



Chris Crook	0416 079 966
James Jayesuria	0411 689 511
Justin Connally	0402 340 658

We know that this world is changing and will continue to change rapidly moving forward

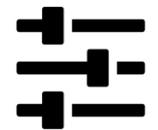


We want to provide you with the most up-to-date insights into COVID-19 so you can stay as close to your customers at this critical time



For access to our latest free insights follow The Lab Insights and Strategy, and Nature on LinkedIn and bookmark the Brand Navigator website

<https://www.covid19brandnavigator.com/>



For bespoke insights tailored to your category, reach out today