

COVID 19

THE AUSTRALIAN REACTION

THE FIRST 22 WEEKS

REPORT AUGUST 2020



dynataTM

StollzNow
Research & Insights Advisory

Contact

Neil Stollznow
Mobile +61 412 200 235
neil@stollznow.com.au

Giselle Stollznow
Mobile +61 413 273 312
giselle@stollznow.com.au

Office +61 2 9953 7543
Freecall 1300 052 399
www.stollznow.com.au

1 OVERVIEW



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About this research

Dynata and StollzNow Research



Data for this research was carried out by leading Dynata the world's largest first-party data and insight platform.

With a reach that encompasses 62 million consumers and business professionals globally and an extensive library of individual profile attributes collected through surveys, Dynata is the cornerstone for precise, trustworthy quality data. The company has built innovative data services and solutions around its robust first-party data offering to bring the voice of the customer to the entire marketing continuum – from strategy, to innovation, to branding, advertising, measurement and optimization.

Dynata serves nearly 6,000 market research, media and advertising agencies, publishers, consulting and investment firms and corporate customers in North America, South America, Europe, and Asia-Pacific.

The research is part of a wider multi-country survey including USA, Canada, UK, Ireland, Spain, France, Germany, the Netherlands, Italy, India, Singapore, China, Japan and Australia. [Click here](#) for the Dynata reports.

The data has kindly been provided by Dynata to StollzNow Research for additional Australian analysis.



StollzNow Research is a leading research and insights advisory that specialises in travel and tourism, visitor and venue research, health and pharmaceuticals and community relations.

In this analysis we have used our experience in health and community relations to understand the attitudes of Australians to the onset of the pandemic.

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APPROACH & METHODOLOGY



Approach and methodology

Methodology

Dynata

Questionnaire design and data collection on was carried out by Dynata and the analysis uses this data with their kind permission.

Fieldwork timing

Fieldwork is completed weekly commencing on March 17. In the data the date of ending the fieldwork is used for clarity.

Statistical significance

Confidence level

All reporting is at the 95% confidence level or higher.

Colours in tables

In the report text in blue is above average, black on average and red below average. The Net (total) shows significance for differences in the total column. Significance in age shows differences between age groups.

Weighting

Data has been weighted to interlocking age and gender from Australian Bureau of Statistics 2020 estimates.



22,179 fully completed surveys

Confidence level of ± 0.6
@ 95% confidence level



Sample source

- Dynata Australian online panel
- 1,000 responses each week
- 22 weeks of tracking



Criteria for inclusion

Australian residents

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HOW AUSTRALIA IS REACTING TO COVID 19



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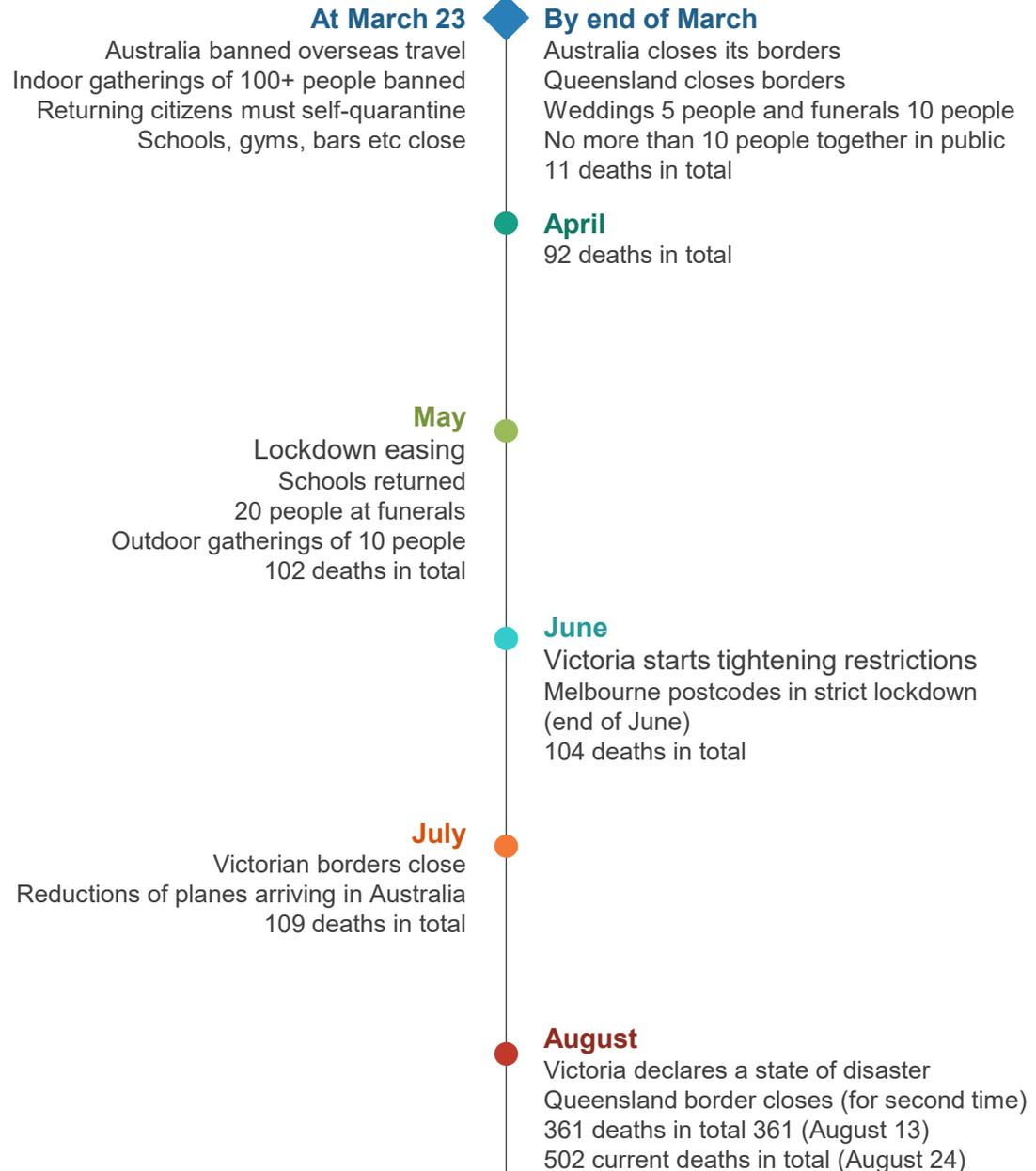
Concerns and attitudes to COVID-19

COVID-19 timeline

Setting the scene

What was happening when the survey was conducted

Weekly research took place between March 19 and August 13



Key findings

All Australians—August 13

Key worries

- World and Australian economies
- Health of the elderly
- Good personal hygiene

March spike

- Heightened worries and behaviour change
- Government imposed restrictions

Change from March 19 to August 13

- Remerging worries
 - Household finances
 - Personal health
 - Being around strangers
 - Healthcare system coping
- Australians are not as confident in the Federal Governments handling of COVID-19 as they initially were

Worries

World and domestic economies cause for concern

Australians are still worried for the elderly



24%

Being worried about enough foodstuffs plateaued at 16% in July but has recently increased



34%

Just on 1/3 of Australians are worried about their personal health; 34 years and under are the most worried (42%)

Physical contact

Many Australians are becoming increasingly uncomfortable being around strangers



39%

Are very satisfied with the Federal Government and how they are handling COVID-19. This has decreased from 51%

Health System

By June, Australians had regained confidence in the healthcare system coping, only for that to erode with the increasing cases of infections in August



19%

Nearly 1 in every 5 Australians believe COVID-19 is impacting on their mental health. This is higher for those aged 34 and under



33%

Worried about their household finances

Analysis by age

Younger Australians more concerned about everything

Australians are concerned about COVID-19 but the data shows those aged under 35 have quite different levels of concern to those aged 55 and older.

From the beginning of the pandemic, Australians under 35 have consistently responded with greater concern to questions in the survey to those aged 55+. The 35-54 age group for some questions are as worried as those under 35, but are more confident in other areas.

The under 35 age group are feeling the impact of COVID-19 strongly. So much of their world has changed which makes their future unpredictable. The impact on the 55+ appears far less; they are calmer, more circumspect but many have the luxury of holding these opinions as they are more financially stable.

The most surprising response is 'personal health'. Those aged 55+ are far less concerned about their personal health than those aged under 55; given the 55+ age group is supposed to be the most vulnerable, this finding is almost the opposite to what might be expected

Key areas of difference between age groups

- Household finances: 18% of 55+ are worried compared to 41% of those aged under 55
- Personal health: 35-54 (38%) and under 35 (42%) are far more concerned than 55+ (21%)
- Availability of foodstuffs: Under 35s are far more concerned about there being enough food (36%) than the 55+ age group (11%)
- Healthcare system coping: Nearly half aged under 55 are concerned whereas only a third of 55+ are
- Federal Government: 55+ is the most positive (54%); 35-54 (34%) and then under 35's (29%). All have decreasing confidence from July onwards
- Future Federal Government COVID-19 management: There is closer agreement between the age groups on the government's ability: Under 35 (31%), 35-54 (39%) and 55+ (46%)
- Australia compared to other countries: 65% of the 55+ believe Australia compares well; only 34% of the under 35's have this belief
- Mental health: COVID-19 is affecting nearly a quarter of Australians aged under 55. The impact on mental health of Australians aged 55+ is less, with only 12% feeling their mental health is impacted

4 PANDEMIC WORRIES

Pandemic worries

The economy and health of elderly are main worries

Australians have reported a similar 'worried' pattern for these questions. An initial spike was followed by a growing confidence; when the 2nd wave emerged, for nearly all questions, Australians returned to feeling worried again.

Question asked as rating

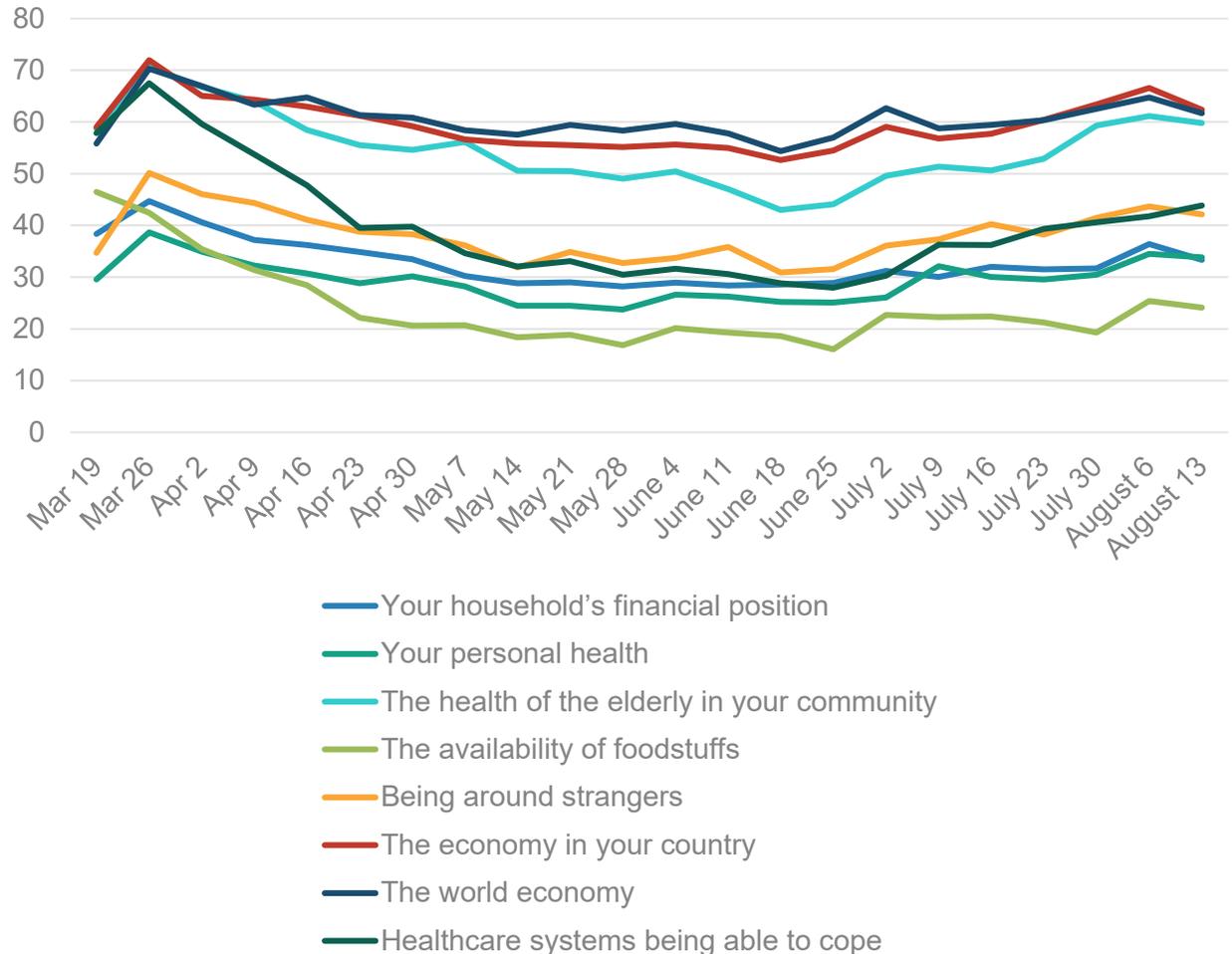
- Extremely worried
- Very worried
- Somewhat worried
- Slightly worried
- Not at all worried

Top 2 Box shown

- Extremely worried
- Very worried

Top concerns:

- Health of the elderly
- Australian economy
- World economy.



Base: all people n=22,179 Top 2 Box shown

Your household's financial position

Household finances worries re-emerge

Concern is returning

All age groups were more worried in the second week of research ending in March 26. Australians then became more confident, but with the emergence of the 2nd wave, household finances are reflecting the increased concerns. How worried Australians are, differs by age:

- Those aged under 55 years are worried
- 55+ have always been the least concerned

Change from March 19 to August 13 is:

- Total - 5%
- Under 35 - 6%
- 35 to 54 years +2%
- 55 years + -12%



Base: all people n=22,179 Top 2 Box shown

Your personal health

Younger Australians more concerned with personal health

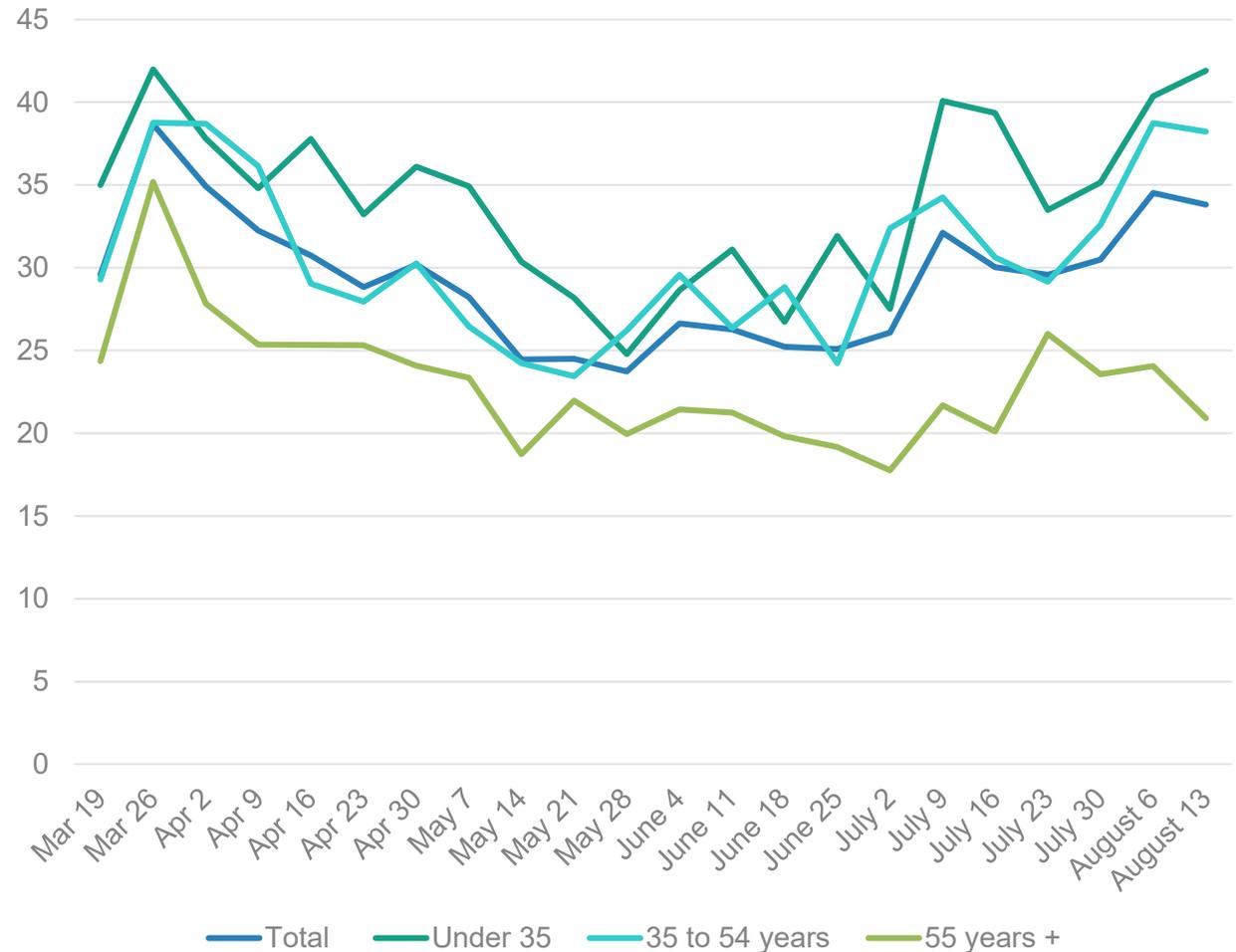
Many Australians have returned to feeling worried about their personal health

Initially all Australians were concerned for their health. From March to August, there has been considerable change. May saw all age groups at their least worried; from mid July, those aged under 55 have become far more concerned for their personal health, to the point they are as concerned as the beginning of the pandemic.

Those 55+ have always been the least concerned about their personal health.

Change from March 19 to August 13 is:

- Total +4%
- Under 35 +7%
- 35 to 54 years +9%
- 55 years + -3%



Base: all people n=22,179 Top 2 Box shown

The health of elderly in your community

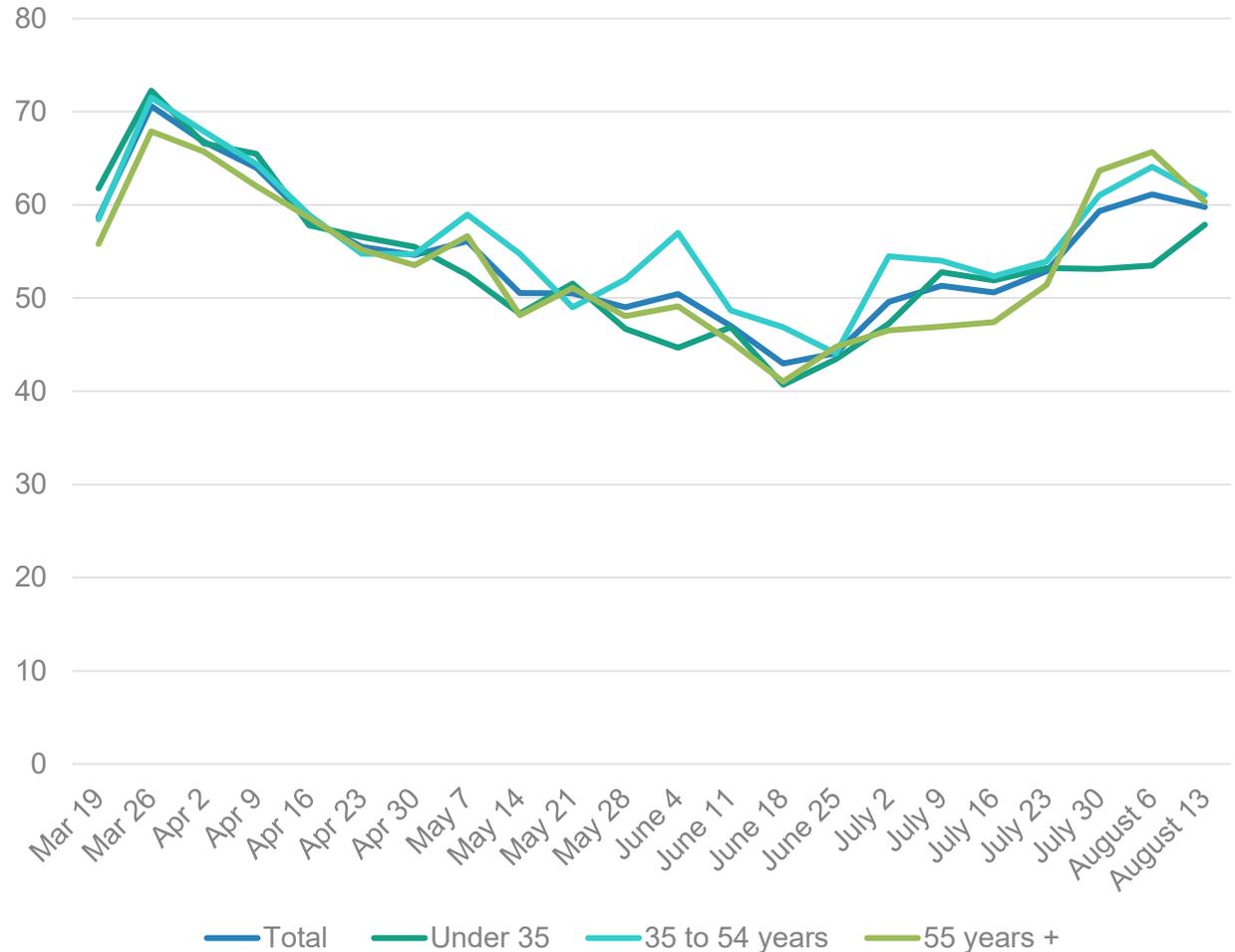
Increased concern with health of elderly

Australians are worried about the health of the elderly.

All age groups are almost equally concerned about the health of the elderly. There was a spike on March 26, then a decline, but as the 2nd wave emerged, Australians again became concerned for the elderly. This remains one of the top 3 worries.

Change from March 19 to August 13 is:

- Total +1%
- Under 35 - 4%
- 35 to 54 years +3%
- 55 years + +4%



Base: all people n=22,179 Top 2 Box shown

The availability of foodstuffs

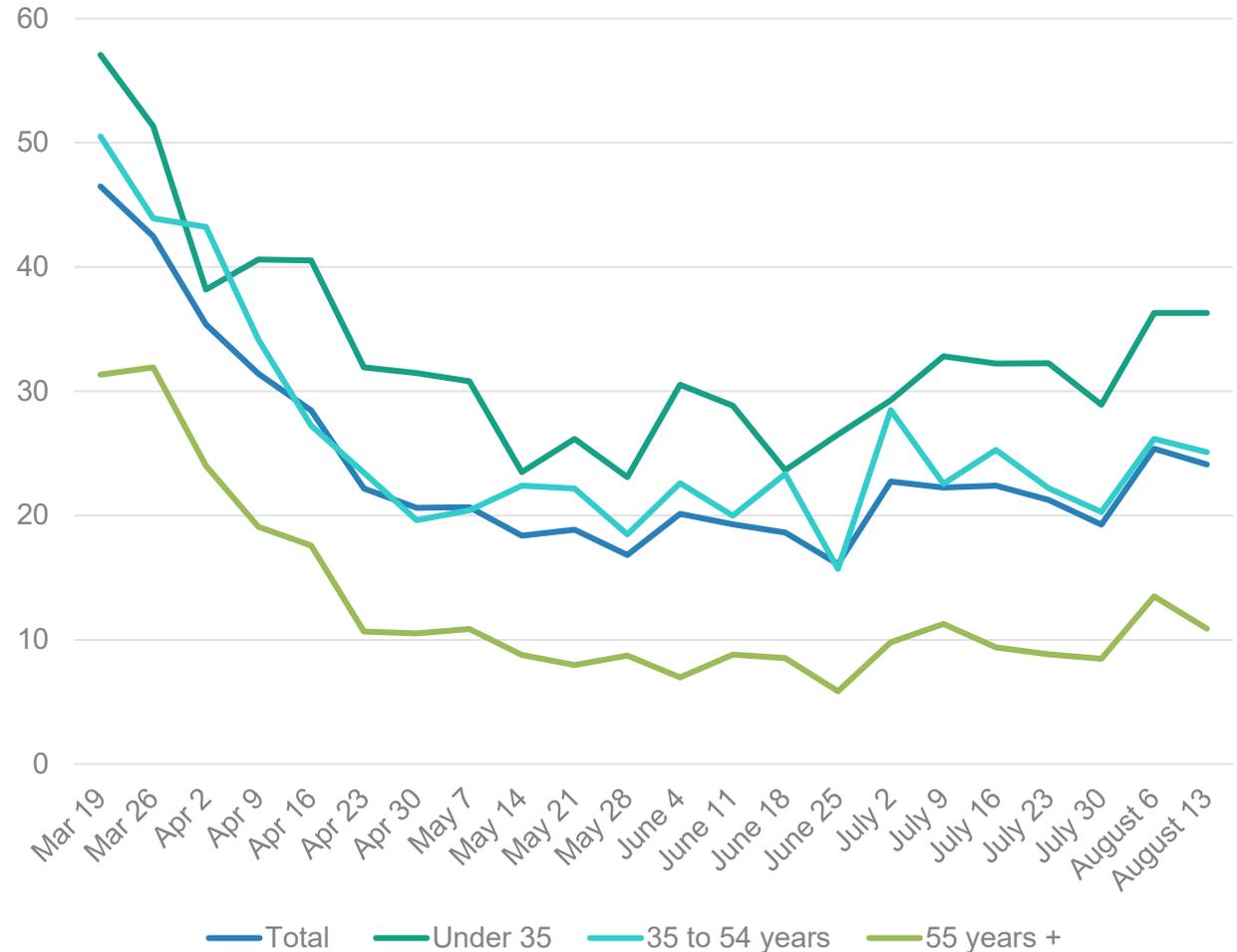
Confidence there is enough food for all wavering

Worry about the availability of foodstuffs decreased to the point where most Australians were feeling confident there will be plenty of food. As the bite of the 2nd wave took hold, some Australians showed signs their worrying about there being enough foodstuffs was returning

Those under 35 years are currently the most worried about availability of foodstuffs, while those 55+ have always been less worried.

Change from March 19 to August 13 is:

- Total - 21%
- Under 35 - 21%
- 35 to 54 years - 25%
- 55 years + - 20%



Base: all people n=22,179 Top 2 Box shown

Being around strangers

More Australians avoiding strangers

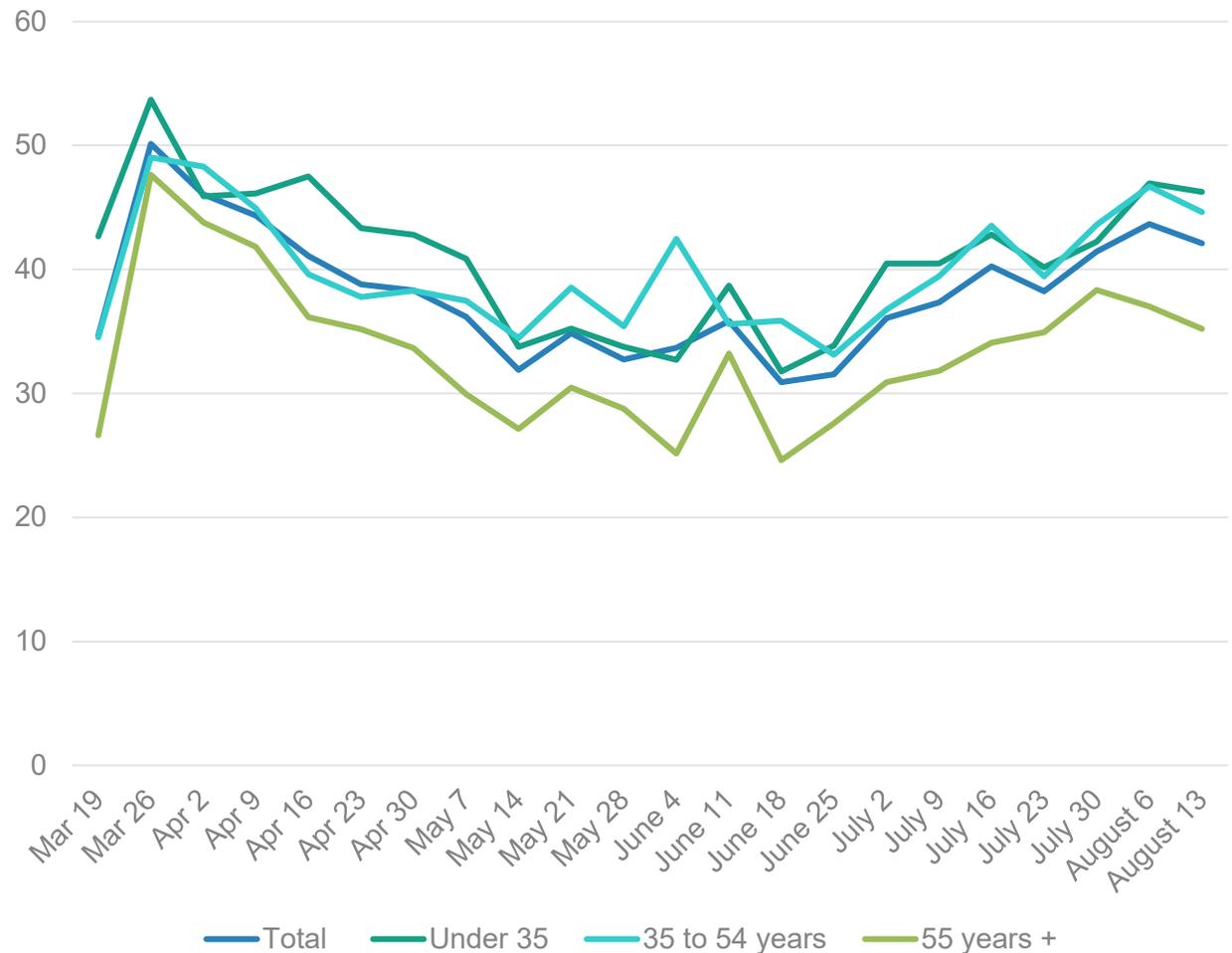
Avoiding strangers was being practiced by nearly half of Australians in late March. By August 13, many Australians had returned to avoiding strangers.

The second week was when Australians were the most concerned: by June avoiding strangers was not a high priority for many, however as the rate of infections increased (July) avoiding strangers has again become common practice for many.

By August 13, while those under 55 are more worried than Australians aged 55+, the gap is not as extreme as it is for other questions.

Change from March 19 to August 13 is:

- Total + 7%
- Under 35 +4%
- 35 to 54 years + 10%
- 55 years + + 9%



Base: all people n=22,179 Top 2 Box shown

The Australian economy

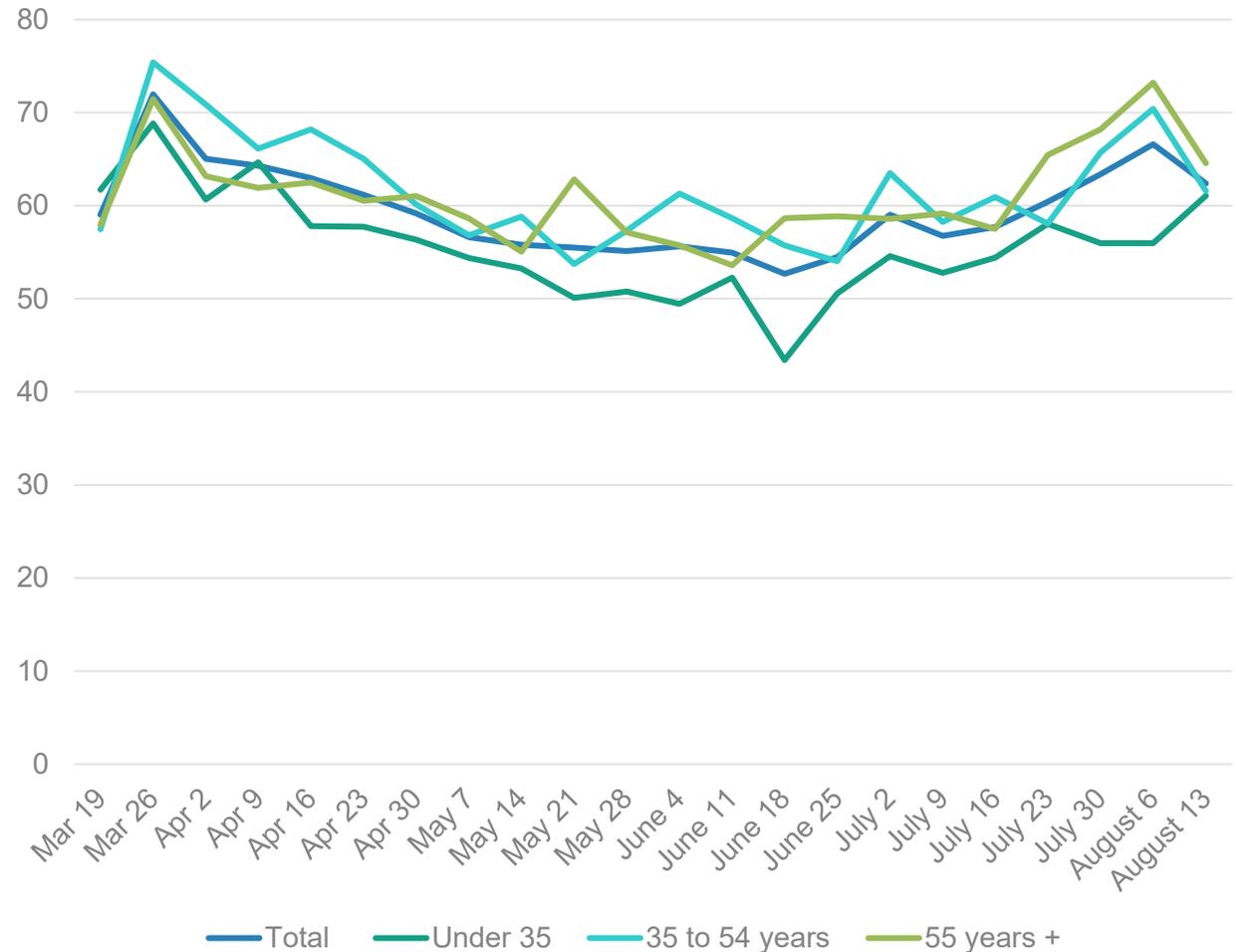
New concerns about the economy

Over 70% of all Australians in late March were concerned about the Australian economy. As the 2nd wave takes hold, so does the concern about the economy

All Australians were similarly concerned at the beginning of the COVID-19 lockdown. This trend remained consistent until May but as conditions have changed, Australians in all age groups have become less positive about the economy. The 55+ age group has been consistently the most worried.

Change from March 19 to August 13 is:

- Total + 3%
- Under 35 - 1%
- 35 to 54 years + 4%
- 55 years + + 7%



Base: all people n=22,179 Top 2 Box shown

The world economy

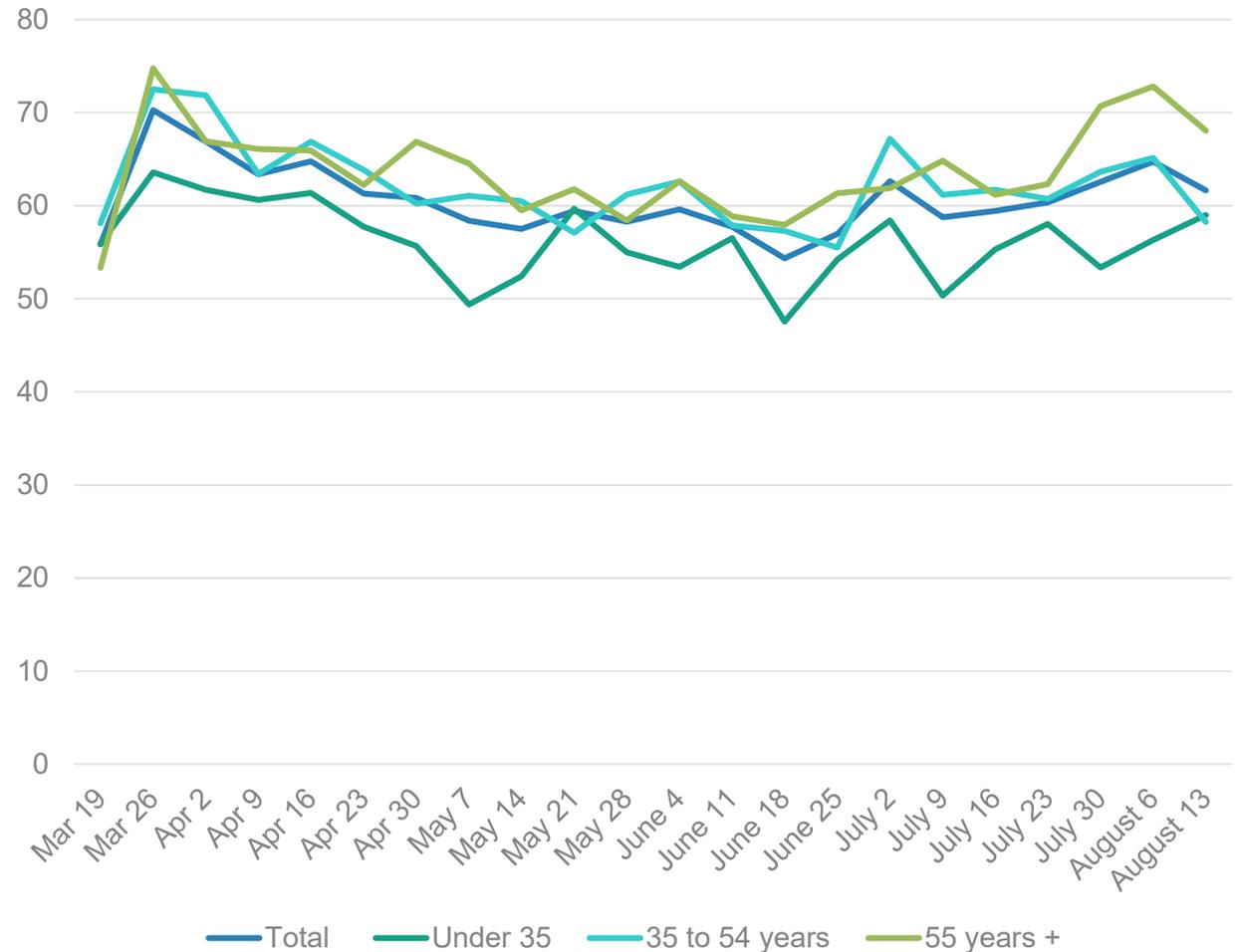
Australians have renewed concern for the world economy

Australians are worried about the world economy. Australians initially reported high levels of worry and while there was a lull throughout May and June, as Australian's infections have increased, so have the world economy fears.

Up until early July, all age groups were almost equally concerned about the global economy. The usually more optimistic 55+ age group has become most concerned, reaching similar worried levels as at the beginning of the pandemic.

Change from March 19 to August 13 is:

- Total + 6%
- Under 35 + 3%
- 35 to 54 years - 0%
- 55 years + + 15%



Base: all people n=22,179 Top 2 Box shown

Healthcare systems being able to cope

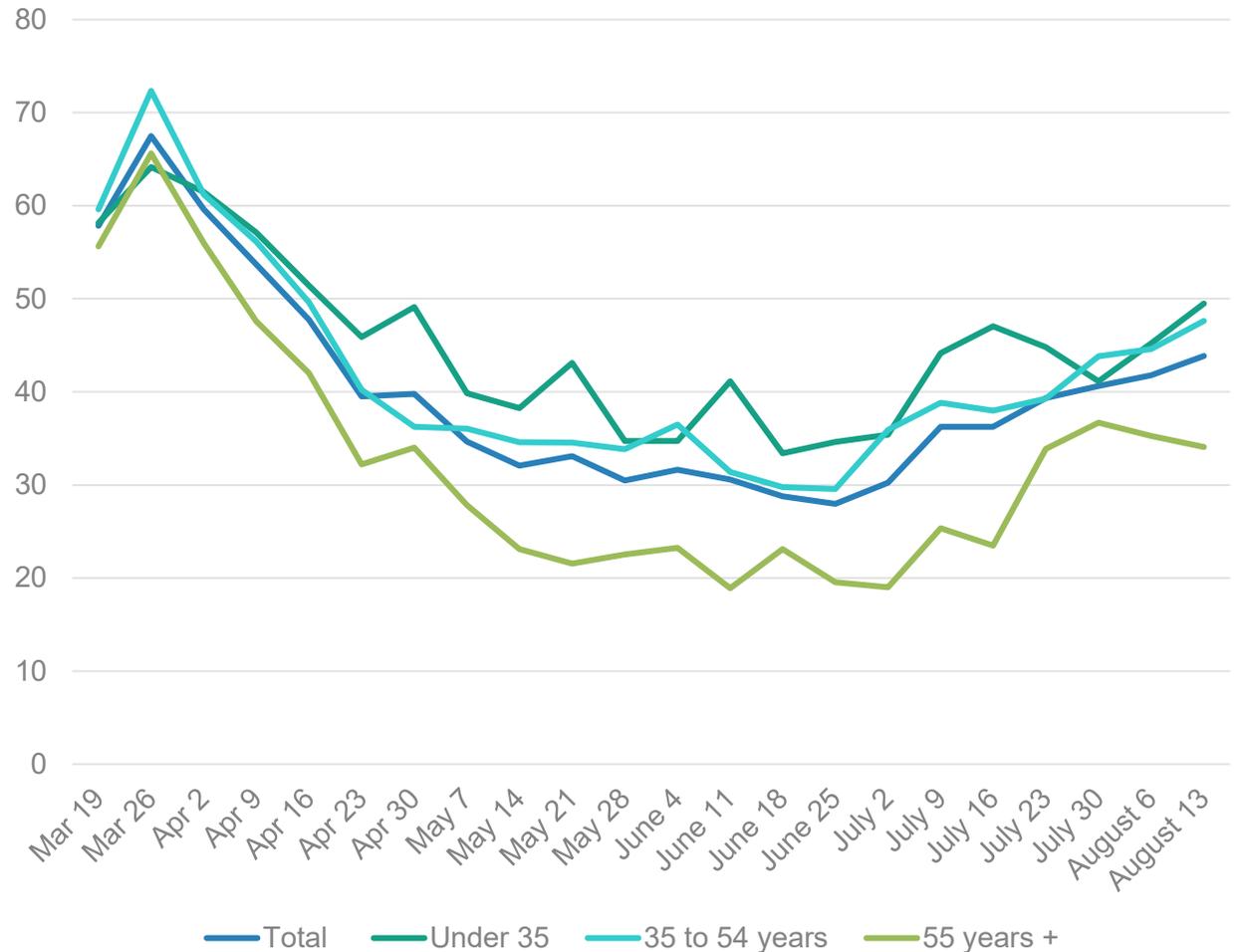
Australians confidence in the healthcare system is wavering

At the beginning of the pandemic, Australians were the most worried about the healthcare system. Their confidence grew when cases were minimal, but the 2nd wave has seen a spike in concern for the healthcare system

Australians aged 55+ are still the least worried about the healthcare system being able to cope; however all groups since early July are becoming more worried. This trend is on the rise, reflecting the increase in the number of Australians being hospitalised.

Change from March 19 to August 13 is:

- Total - 14%
- Under 35 - 9%
- 35 to 54 years - 12%
- 55 years + - 22%



Base: all people n=22,179 Top 2 Box shown

5 GOVERNMENT RESPONSE



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How does Australia compare to other countries

A decrease in confidence in the Australian response

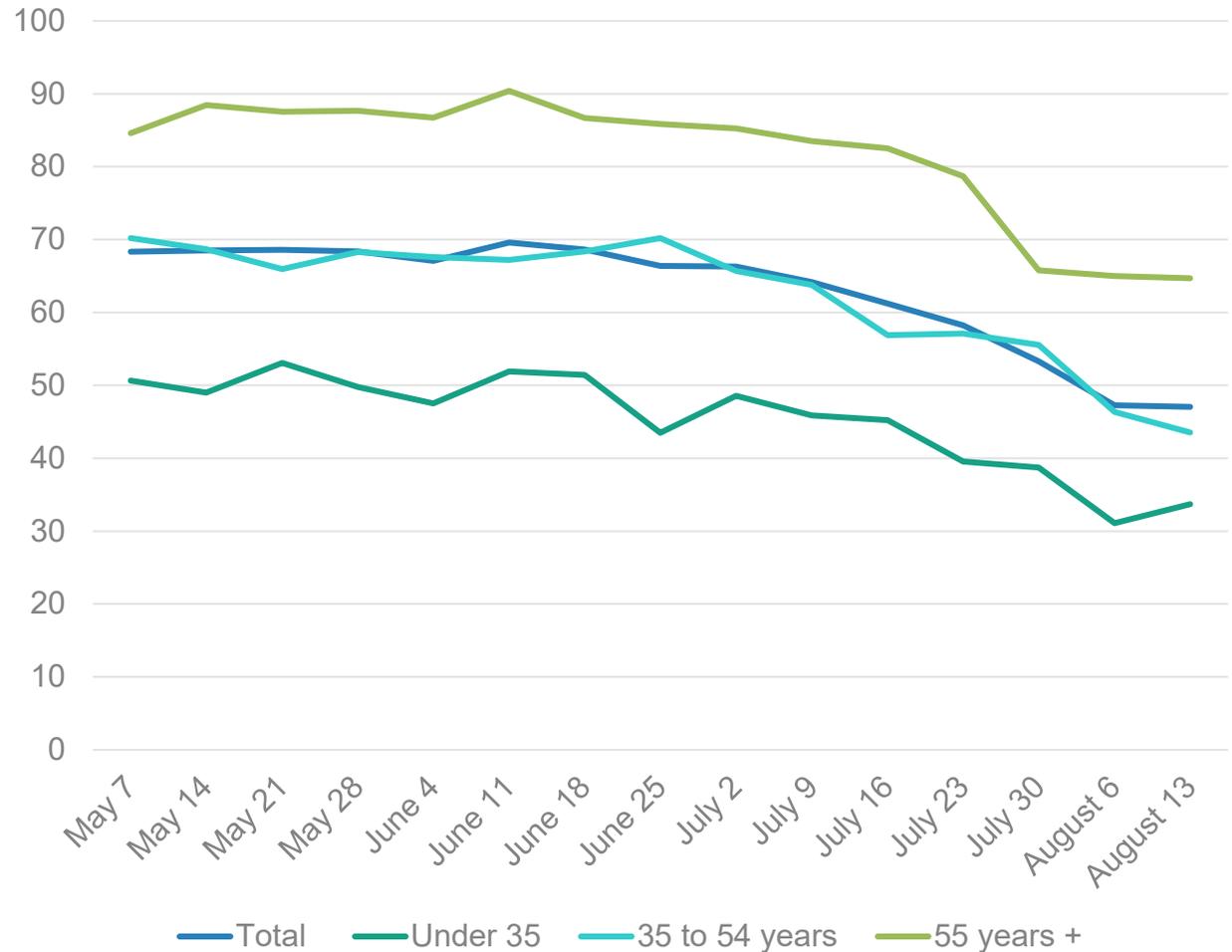
In May, Australia was considered to compare well to other countries, with 70% of Australians answering positively. By August 13, there had been a strong drop in confidence

Up until mid June, Australians were at their most confident about the country's response. After that point, as infections began to emerge, the drop in the belief about how Australia was comparing to other countries began to decline.

The 55+ have always had the strongest belief Australia is performing well, and the under 35's have always had the lowest belief; by August 6 only 30% of Australians in this age group thought Australia compared well to other countries

Change from May 7 to August 13 is:

- Total - 21%
- Under 35 - 17%
- 35 to 54 years - 27%
- 55 years + - 20%



Base: all people n=15,010. Top 2 Box shown. Question asked from May 7

Satisfaction with Federal Government

Confidence decreasing in Federal Government handling of COVID-19

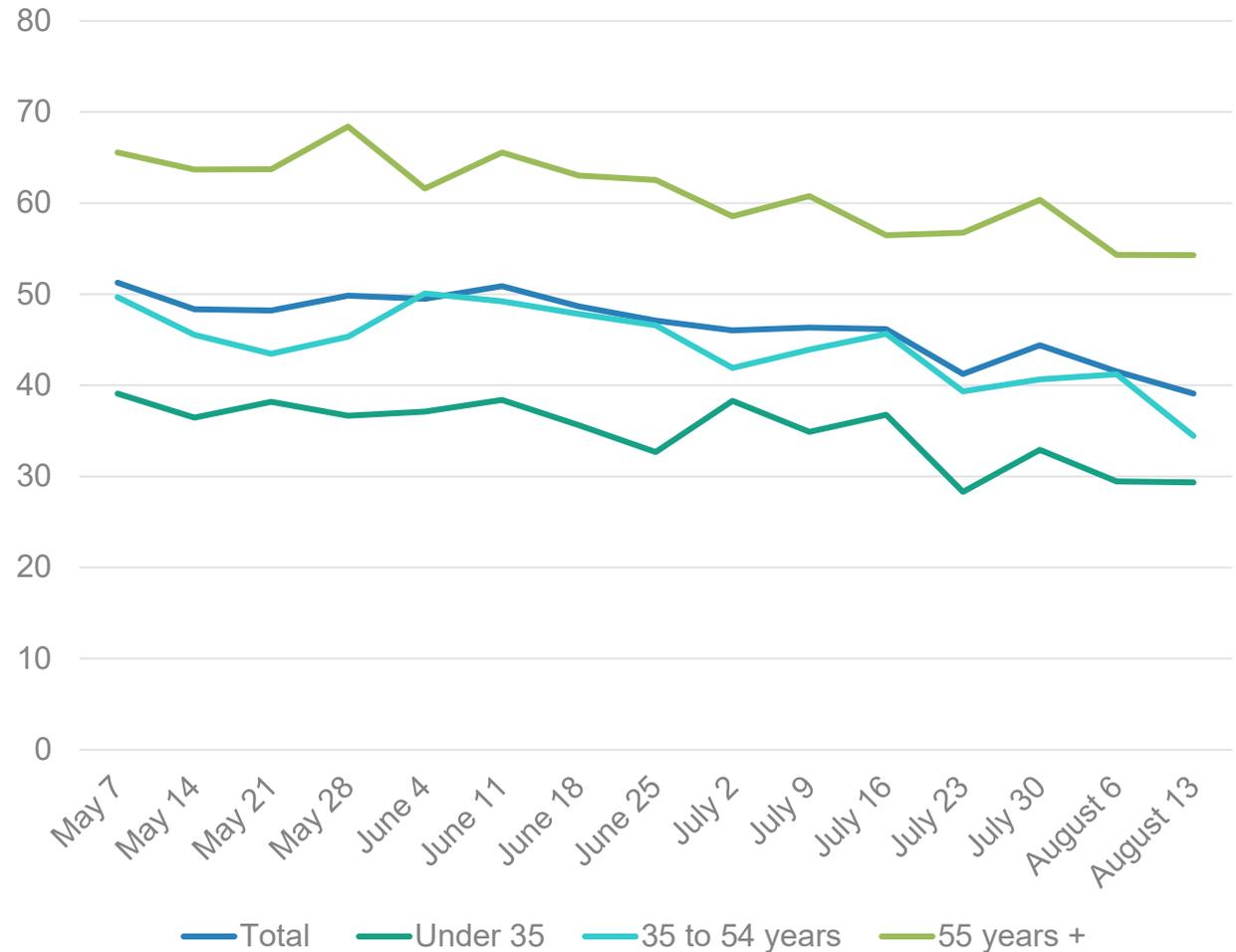
In May, when this question was first asked, half of the Australian population were 'extremely' or 'very' satisfied with the Federal Government. Since that time, this has slowly decreased.

The 55+ continue to be the most supportive of the Federal Government and the way they are handling COVID-19. Those aged 35-55 years are the most consistent in their satisfaction, and those aged under 35 the least satisfied.

All age groups have decreased their satisfaction levels to a similar extent over this time period.

Change from May 7 to August 13 is:

- Total - 12%
- Under 35 - 10%
- 35 to 54 years - 15%
- 55 years + - 11%



Base: all people n=15,010. Top 2 Box shown. Question asked from May 7

Federal Government future management

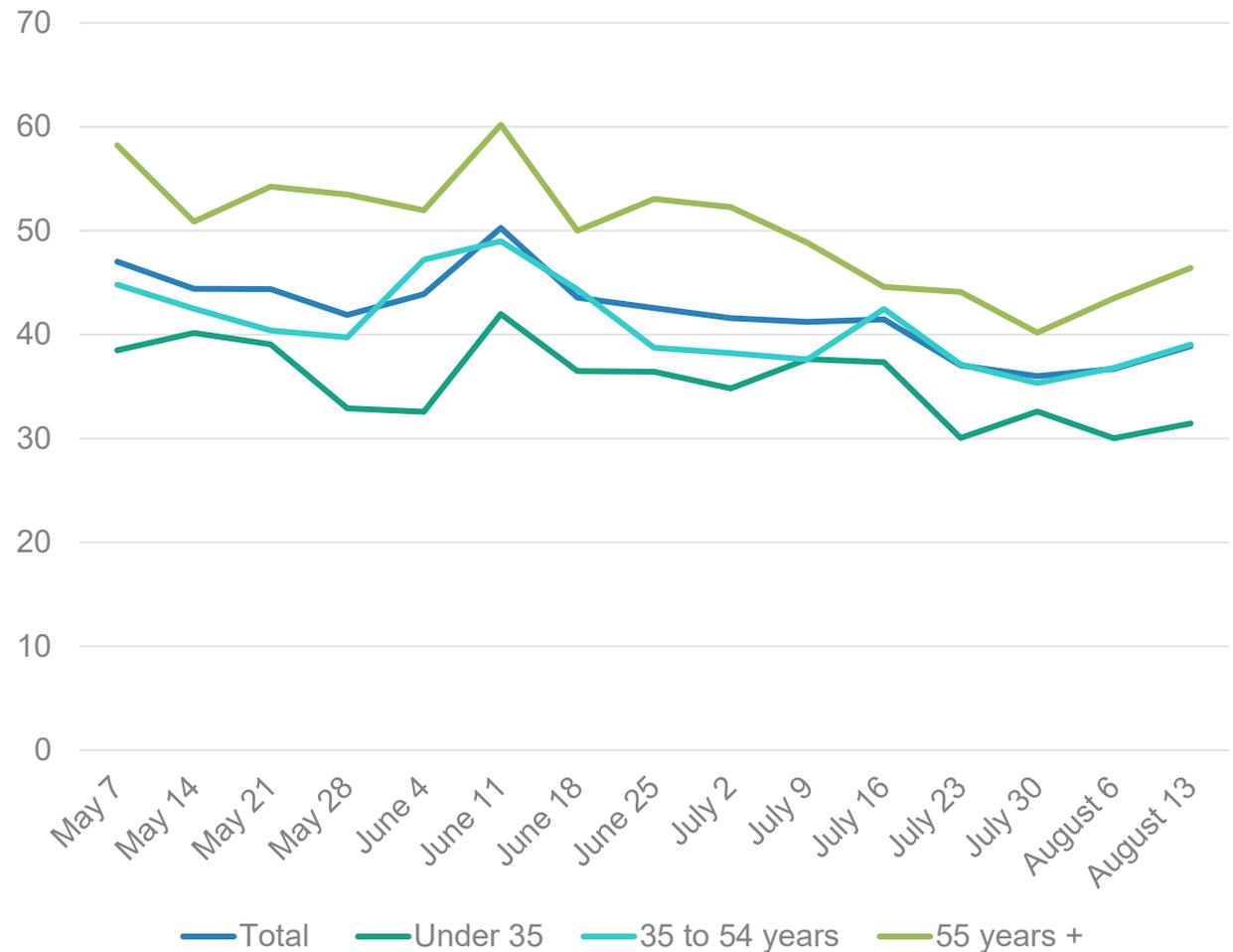
Confidence decreasing in Federal Governments management abilities

Confidence in the Federal Government's ability to manage COVID-19 in the future has varied. There is a continual decrease in confidence for all age group, although there are indicators that in August, the Australian public is regaining some confidence

The 55+ were the most confident in May and the under 35 the least confident. All groups have had a similar level of decreasing confidence. The spike in mid-June occurred at the time Victoria was discussing stricter lockdowns, although even as these were implemented, confidence continued to decrease. Economy outlook reporting may be contributing to the declining confidence levels.

Change from May 7 to August 13 is:

- Total - 8%
- Under 35 - 7%
- 35 to 54 years - 6%
- 55 years + - 12%



Base: all people n=15,010. Top 2 Box shown. Question asked from May 7

6

MENTAL HEALTH



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Impact on personal mental health

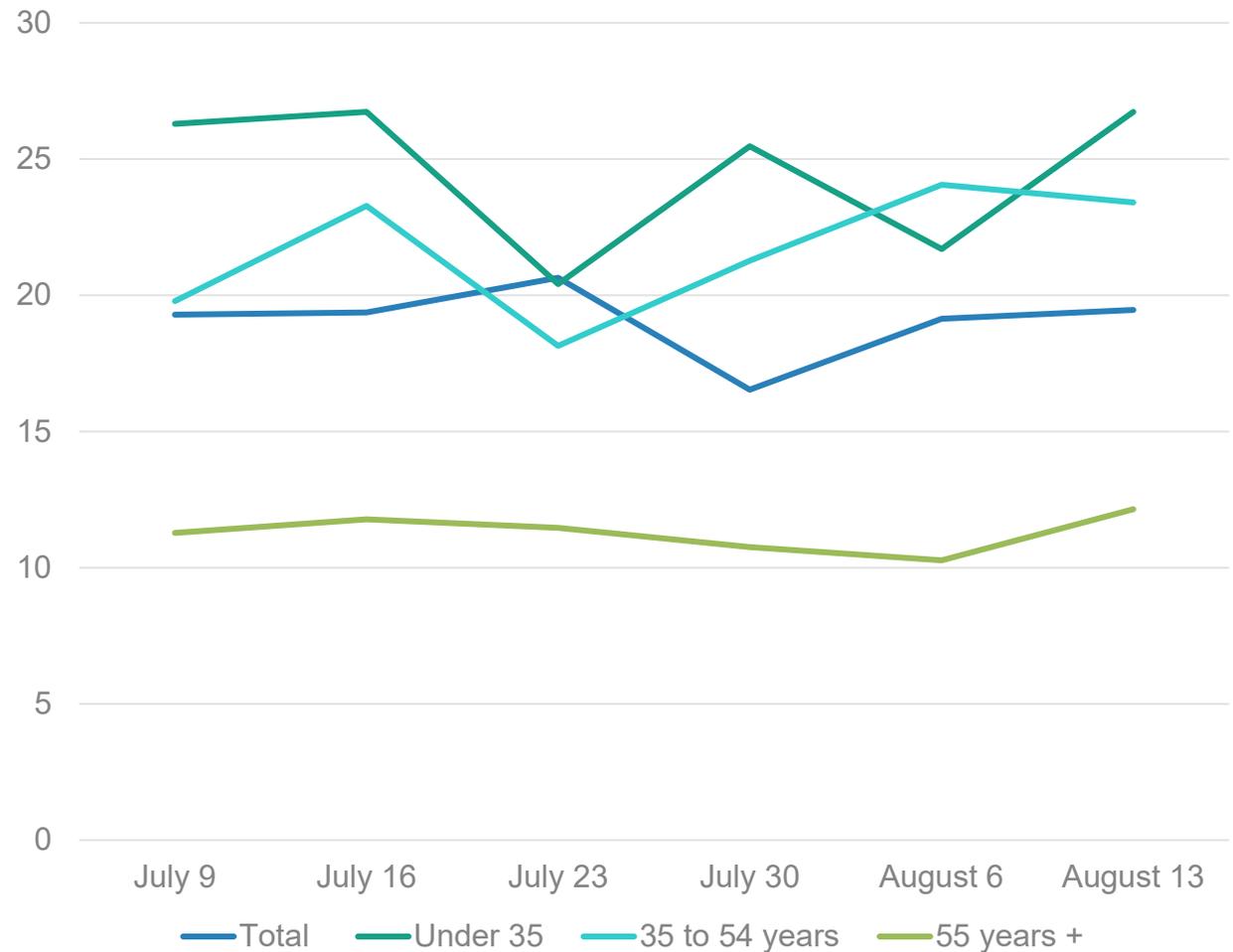
Under 35 year old's most affected

One in every 5 Australians feels COVID-19 has had an impact on their mental health

The age group reporting the most impact is the under 35s, with just over a quarter in this age group reporting the impact of COVID-19 on their mental health. The 35 – 54 age group is also reporting similar levels. Financial concerns, family welfare, the lack of current optimism, not to mention changes in everyday living are all impacting on these Australians more than those aged 55+

Change from July 9 to August 13 is:

- Total 0%
- Under 35 0%
- 35 to 54 years + 4%
- 55 years + + 1%



Base: all people n=6,002. Bottom 2 Box shown. Question asked from July 9

7 MASK WEARING



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Wearing a mask

Almost half wear a mask 'every time' or 'most of the times' they go out

Almost half (49%) wear a mask 'every time' or 'most of the times' they go out (Top 2 Box)

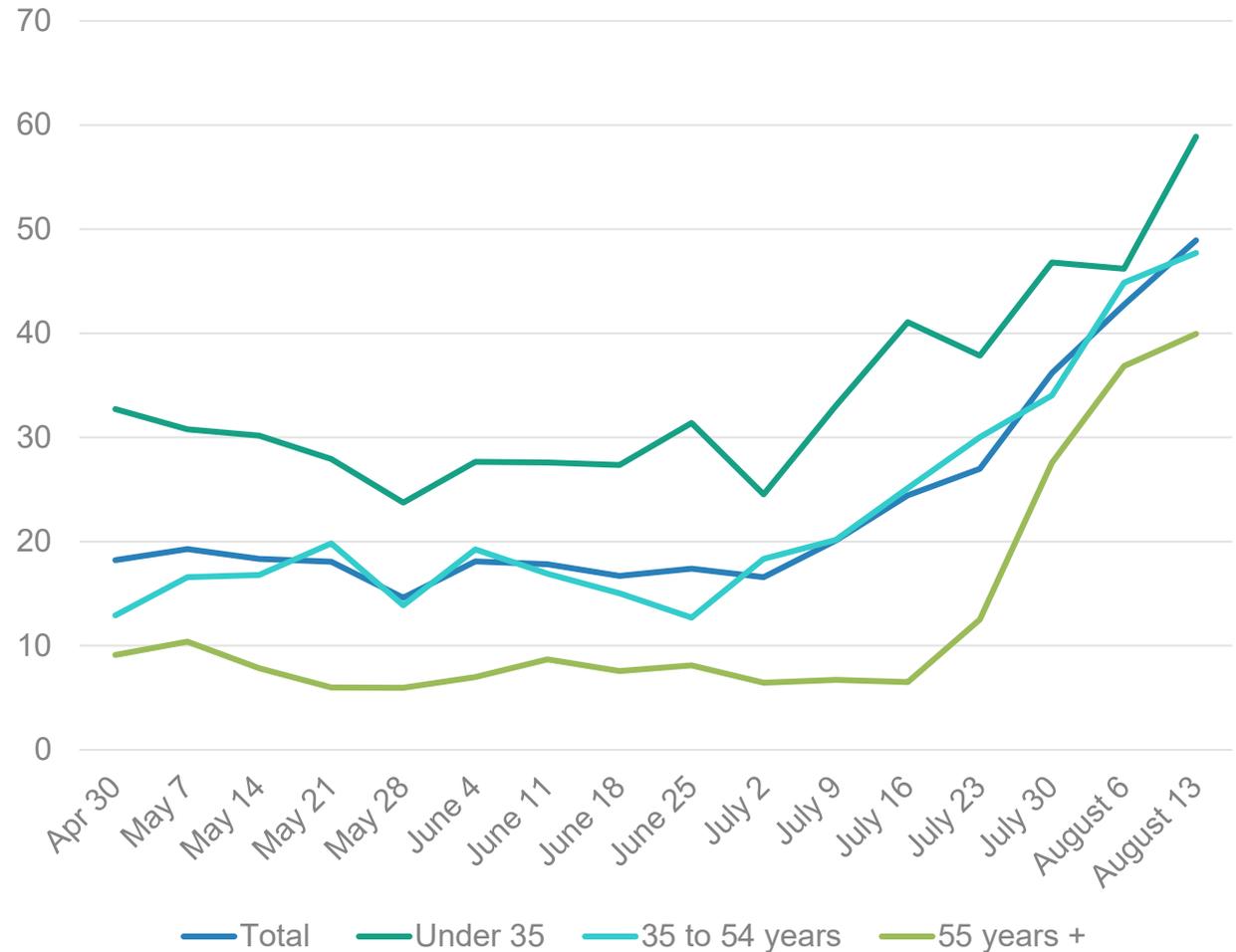
State data is not available but Victoria where mask wearing is mandatory is only 25% of the Australian population. This means that 15% of adults in other States and Territories are likely to be currently wearing masks.

Those under 35 years of age are more likely to be wearing a mask (59%).

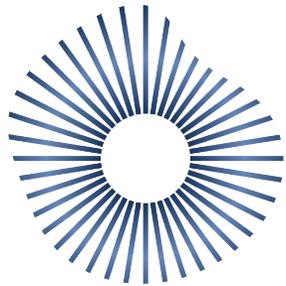
When this question was first asked on April 30, 18% were mostly wearing a mask. Mask wearing has increased by 30%.

Scale of wearing a mask:

- Every time you go out
- Most of the times you go out
- Some of the times you go out
- Only occasionally
- Never
- I do not go out



Base: all people n=5,355 Top 2 Box. Question asked from April 30



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For more information

Email info@stollznow.com.au

or call +61 2 9953 7543