



# AUSTRALIA ON HOLD?

Conducting social and market research in Australia during COVID-19

April 2020

# THE AUSTRALIAN OUTLOOK IS CHANGING BY THE DAY

## Increasing Worry and Anxiety

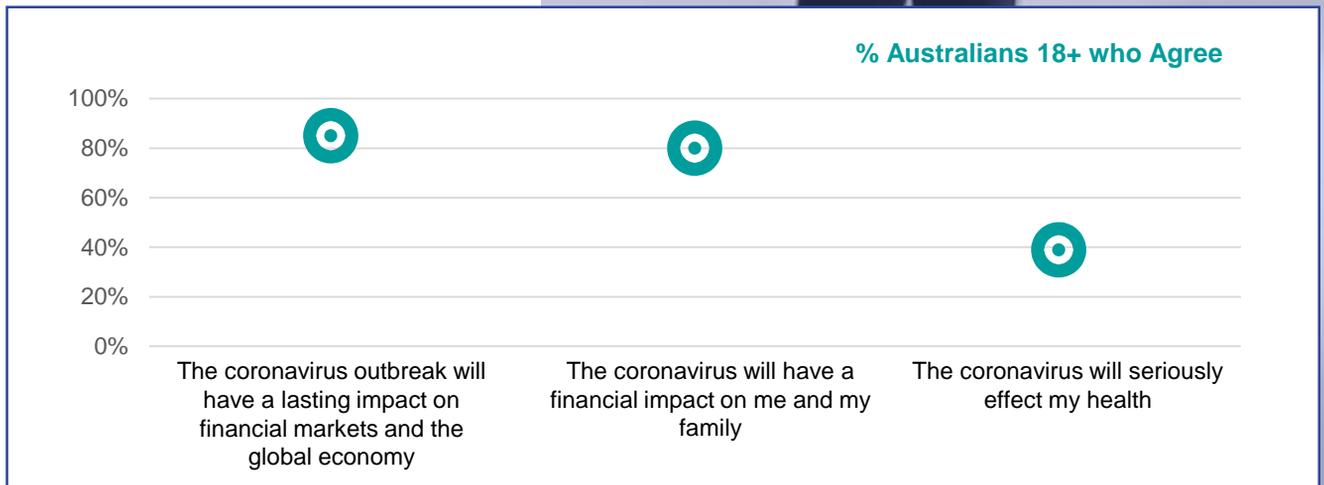
There have been some heart-wrenching events over the last 30 years since the 1991 recession “we had to have”. 9/11 in 2001, the GFC in 2008 and other various localised events around the world have created significant trauma and taken a toll on humanity.

However, the economic, commercial and financial impact on citizens of the world from these events do not compare to the devastating effects of the current Covid-19 pandemic of 2020.

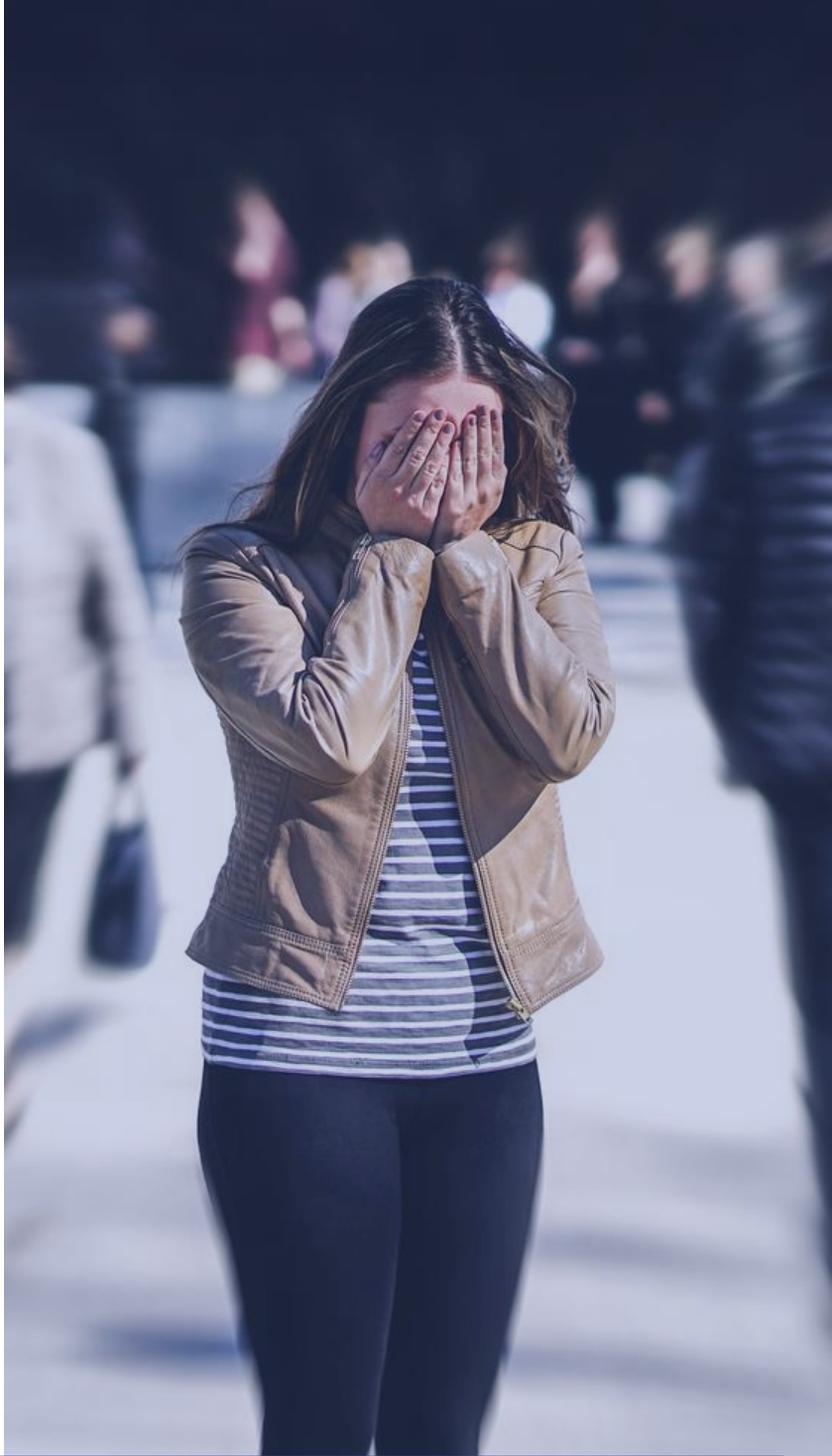
Our latest global tracking results show that Australians are becoming increasingly anxious about the economic impact of Covid-19.

In fact more Australians are now worried about the impact of the pandemic on their financial security than on their health. This begs the question: what should Government and businesses be focused on right now when engaging with Australians?

### Perceptions of Impact of Covid-19, Ipsos Global Advisor Covid-19 Opinion Tracking



Base: Australian general population 18+, n=1,000, fieldwork was conducted March 19<sup>th</sup> to 21<sup>st</sup>





There are a lot of uncertainties facing government and businesses at the moment, but one thing we can be sure about, is that everything is changing. There are so many issues to watch and monitor over the coming weeks and months. Governments are under pressure to lead and inform. Businesses – large and small – have to make the right decisions for their employees and their customers. Meanwhile, people’s behaviours are changing in ways which may have longer-term implications beyond the immediate circumstances of the crisis.

We know from Ipsos weekly tracking that Australians’ behaviours are varying from the norm with increasing frequency of activity in some areas, decreasing frequency in other activities, and even the rapid adoption of completely new emerging behaviours.

### Changing behaviour of Australians, Ipsos Global Advisor Covid-19 Opinion Tracking

Half or more Australians are doing more frequently:	Half or more Australians are doing less frequently:	Half or more Australians have not changed their frequency:
<ul style="list-style-type: none"> <li>○ Spending time at home</li> <li>○ Following the news</li> <li>○ Using online streaming &amp; video services</li> </ul>	<ul style="list-style-type: none"> <li>○ Eating out a bar or restaurant</li> <li>○ Eating out at a fast food restaurant</li> <li>○ Going to a major shopping centre</li> <li>○ Attending social or sporting events</li> </ul>	<ul style="list-style-type: none"> <li>○ Having food or groceries delivered</li> <li>○ Using e-commerce or shopping online</li> <li>○ Changing investment or savings decisions</li> <li>○ Using social media</li> </ul>

Base: Australian general population 18+, n=1,000, fieldwork was conducted March 19<sup>th</sup> to 21<sup>st</sup>

The extent of the behaviour change being stimulated is creating a market landscape in flux. Businesses can no longer depend on what they think they know about their category and the behaviour of their consumers. There are threats emerging that need to be understood, but likewise for many, this change also brings opportunities to be leveraged.

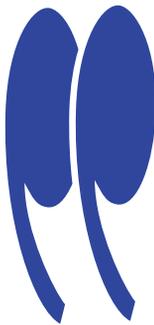


Given all the unknowns in the current environment, it can be challenging to prepare for all possible scenarios.

Key questions for organisations to consider at this time include, “What are we doing that could be seen as not ‘doing enough’”, and, “Are we doing something that might be actively detrimental or seen as inappropriate?”.

Many organisations are struggling with adopting the right tone...too flippant or commercial and they risk sending the wrong signal or worse be seen to be profiteering.....

**....but at the same time, doing nothing is almost as bad.**



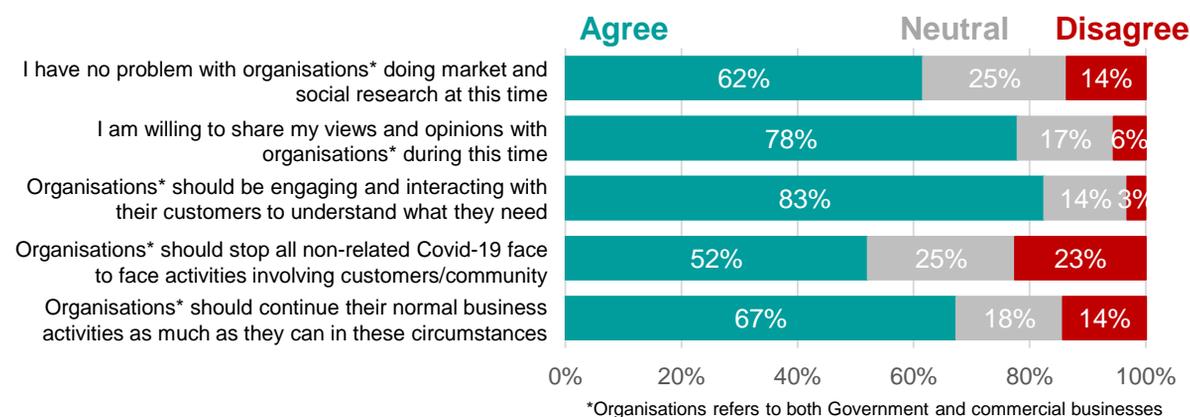
*Advertising and marketing are a selfish pursuit. They serve a single brand and a single organisation. But if you step back and look at their overall impact, they perform the broader function of helping to turn the wheels of our economy. And right now — other than clean hands, more respirators and two metres between you and your best mate — we need that more than anything“*

Mark Ritson, “Marketing in the era of coronavirus”, Mumbrella

# SO...WHAT SHOULD ORGANISATIONS BE DOING?

There is no one easy answer to this. Each organisation needs to make the right decisions for itself based on their own circumstances. However Ipsos research conducted with Australians aged 18+ from Wednesday 25<sup>th</sup> to Friday 27<sup>th</sup> March indicates there is clear permission for organisations to continue doing a range of activities including conducting market, social and opinion research.

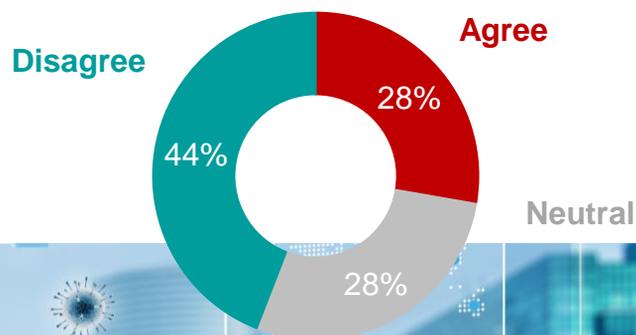
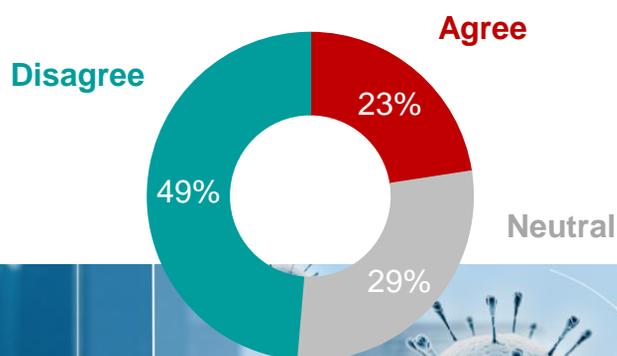
The large majority of Australians are still willing to share their views and opinions with organisations during this time (78%), and believe that organisations should continue to engage and interact with their customers to understand their needs (83%). When asked specifically about doing market and social research, 62% indicated they have no problem with organisations continuing to do that.



**From the same survey less than one-quarter (23%) of Australians believe that organisations should stop all non-related Covid-19 online/digital activities, and only 28% believe that organisations still doing market research or advertising on matters not related to Covid-19 are being insensitive.**

Organisations\* should stop all online/digital activities involving customers/community

Organisations\* still doing market research or advertising on matters not related to Covid-19 are being insensitive and wasting my time



# Covid-19 vs. Non Covid-19 Activities

The vast majority of Australians support both Government and business organisations conducting any commercial activities related to assisting with Covid-19, including: launching new products or/services and advertising products and services relating to Covid-19.

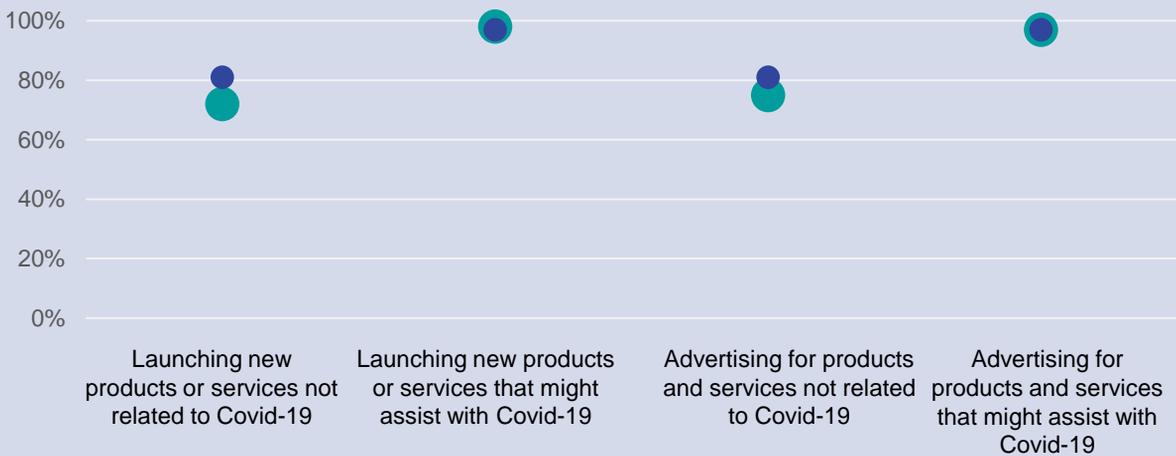
Support for activities not related to Covid-19 is also very strong, however there is slightly higher support for businesses conducting activities not related to Covid-19 than Government. This suggests there may be a community sentiment that Government should be focussing their resources on tackling Covid-19.



*It has been a pleasure to be part of your research on such an important and global issue. I do hope my small part was useful in some way and you can use it. Thoroughly enjoyed doing it, hope there are more to come. So thank you for selecting me to be part of your study. Thanks"*

(Verbatim comment from a Government Covid-19 research study conducted w/c 23<sup>rd</sup> March)

**% Appropriate/neutral for Government**  
**% Appropriate/neutral for Businesses**



Majority of Australians believe it is appropriate for Government to undertake activities on these topics at this time	%
Mental health	91
Crime	90
Cancer prevention and treatment	90
Public Housing	88
The environment	87
Experience of patients in hospitals	87
Road safety	87
Drugs and alcohol	86
Aboriginal and Torres Strait Islander programs	85
Public transport	85
Recycling	84
Transport infrastructure (roads, railways)	80

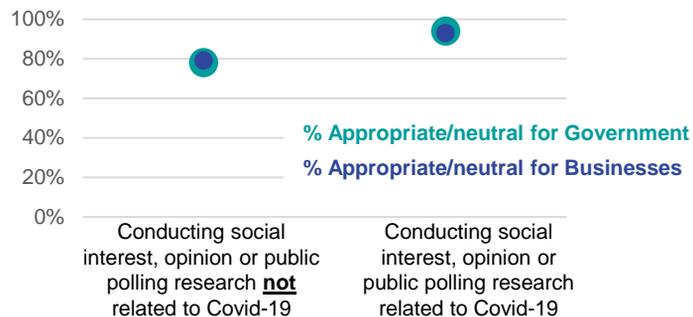
Overall 75% of Australians feel that it is appropriate for Government to focus on any these topics (shown adjacent).

Other than undertaking activities related to Covid-19, the vast majority of Australians believe Government should maintain activities related to: mental health; crime; cancer prevention; public housing; the environment and the experience of patients in hospitals.

Of slightly less, but still high importance to Australians at this time are: road safety and transport issues; ATSI programs and recycling.

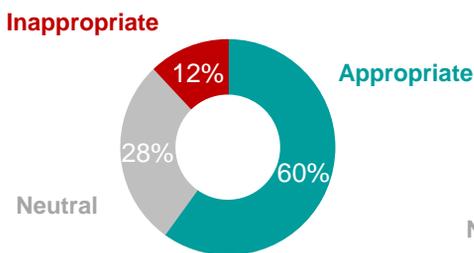
# MOST AUSTRALIANS BELIEVE CONDUCTING RESEARCH IS APPROPRIATE AT THIS TIME

Conducting social interest, opinion or public polling research during this time is seen as appropriate (or Australians have a neutral opinion) by the large majority of Australians, and even more so if the research is relating to Covid-19.

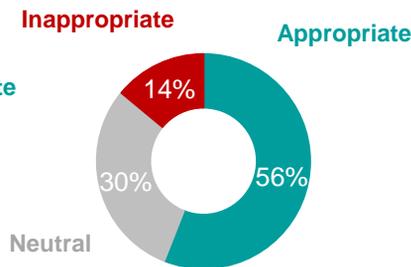


But even conducting other forms of market research not related to Covid-19 are still seen as appropriate to the majority of Australians during this time.

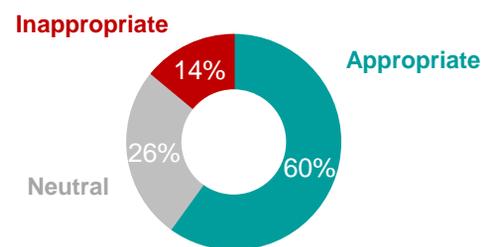
Businesses conducting customer satisfaction or experience research with their customers (during this time)



Businesses conducting marketing, brand and product research (during this time)



Government conducting research on or advertising about other medical issues not related to Covid-19 (during this time)



Source: Ipsos research conducted with Australians aged 18+ from Wednesday 26<sup>th</sup> to Friday 27<sup>th</sup> (Base: 1,000 Australians aged 18+)

These sentiments are supported by a range of feedback received on surveys conducted by Ipsos across the weekend of 28<sup>th</sup> and 29<sup>th</sup> March.

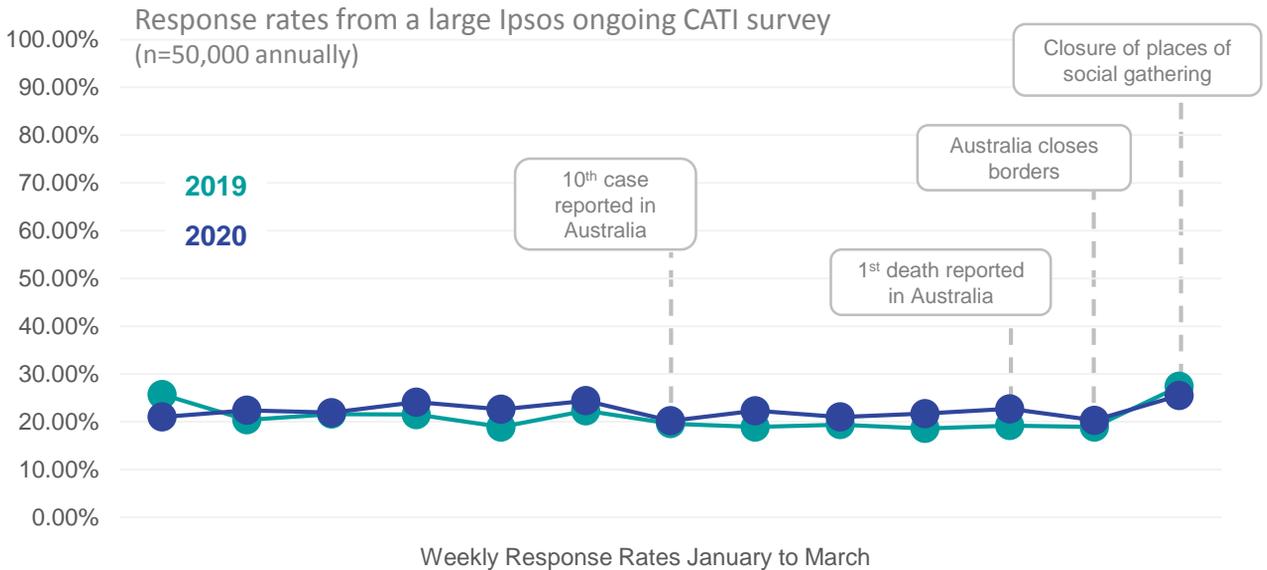
## Verbatim feedback from a sample of surveys conducted from Monday 23<sup>rd</sup> to Friday 27<sup>th</sup> March

- "Thank you for taking my input, quite an interesting exercise"
- "Thank u. The project I found was very informative and I look forward to seeing some ad on TV, it gives me something to look forward to"
- "Thank you for letting me share my ideas"
- "Thanks for letting me share my opinions and I hope it helps"
- "Thank you for the chance to voice my opinions"
- "Thank you for the opportunity to share"
- "Thank you very much for letting me part of this research project"
- "Thank you for letting me participate"

# HOW ARE RESPONSE RATES BEING IMPACTED?

## The short answer is: not much change

Response rates from Ipsos Australia for a large CATI survey are shown below from the beginning of this year to last week and compared to the same period last year. The evidence is clear, response rates have not been impacted by the coronavirus pandemic. This might change over coming weeks, but it could be just as likely for response rates to go up, as they are to go down.



## Why aren't response rates changing?

A paper published in the International Journal of Market Research in November 2019, co-written by an Ipsos Director of Social Research and PhD candidate, may have the answer\*. The paper identifies several key drivers for participation in online research, these being:

- **Mechanical Issues:** such as survey length, personalised invitations, number of reminders, questionnaire design etc.
- **Topic and Sponsor:** Interest in the topic and trust or relationships with the organisation conducting the survey.
- **Self-Actualisation:** desire to voice one's opinion, curiosity, enjoyment, desire to help and be recognised, and a feeling of obligation.

Although this paper refers to online research participation specifically, similar motivations are well documented as drivers to participating in any form of research. With the introduction of social distancing, online and telephone are the only safe methods. Despite the external environment, intrinsic motivations do not change during a time of crisis. In fact, for some they may intensify and some people might be more engaged, more willing to help and have a stronger internal need to have a voice and express their opinion, regardless of whether the topic is related to the crisis or not.

\* Maximising participation from online survey panel members; International Journal of Market Research; 6 November 2019; Kylie Brosnan, Astrid Kemperman and Sara Dolnicar



# BUT ARE OUR RESPONDENTS' VIEWS RELIABLE AND MEANINGFUL?

The Ipsos Global Behavioural Science Unit provides the following guidelines based on BeSci principles.

## Interest and Infocixation

In the earlier stages of a crisis the community has high engagement with the topic. Information about the topic cuts through and other messages tend to be filtered out. However as time goes by and people are hearing repetitive messages, or as they become overwhelmed with the crisis topic, they will look for other information or activities to engage in that create a feeling of normality which in turns provides comfort and relief from the crisis topic.

### Concreteness Effect

Participants in a recent BeSci comms study relating to Covid-19 asked for messages not to be “dumbed down”. The ‘concreteness effect’ means faster reaction times and more accurate responses for concrete versus abstract words. This principle also applies to communications that are not related to Covid-19. BeSci tells us that it is best to continue to be honest and realistic.

## Fluid Decision Context

In our normal life, day to day, we inhabit a world of certainty with established traditions and routines that allow us to simplify decision-making. Coronavirus has caused upheaval, creating unstable environments and uncertainty. People are adapting to their changing, unstable environments and operating outside their predictable patterns.

When context and behaviour shifts, we are taken out of our automatic rhythms and we pay mindful attention. Rather than a time of crisis being one where opinions may be unreliable, it might in fact, be the opposite.

These times could be a window of opportunity for organisations to obtain a greater level of cognitive engagement thereby resulting in greater clarity and more informed responses simply because people have been jolted out of their normal system 1 default and heuristic response framework.

## Framing

Many organisations have a healthy fear of being viewed as being inappropriately opportunistic if they maintain normal activities in a time of crisis. Even companies that supply relevant health products are reluctant to mention Coronavirus. But while it is vital to avoid being perceived as a crisis profiteer, organisations should not let this caution dissuade them from being active in the market. Instead, organisations should frame their activities by showing empathy for the situation and by explaining to consumers the important economic purpose behind their actions. Framing needs to focus on the benefits for the economy and consumers long-term rather than focus on the objectives of the organisation.

### In summary...

History provides evidence that brands can grow in distressing times. Wise brand leaders who are willing to be actively present and continue to engage with consumers, can emerge from this challenging period with stronger brands and a more committed, trusting fan base.

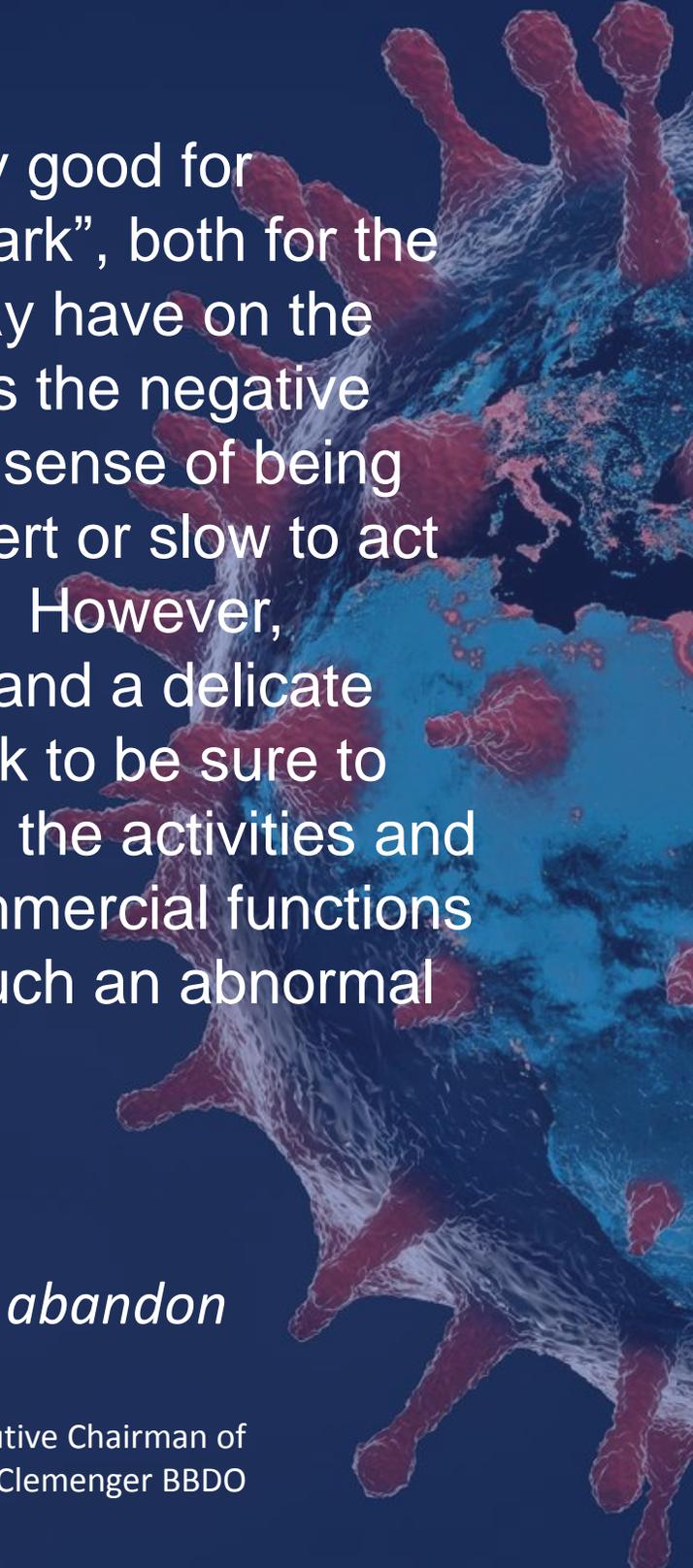




# IN TIMES OF CHANGE, PEOPLE LOOK FOR STRONG LEADERSHIP

In times of crisis, it can be tempting and less risky to go into containment mode, quietly and carefully weathering out the storm. But there is a unique window right now for organisations and brands to show leadership and earn trust by continuing to engage by maintaining their presence, by staying in touch and by showing a commitment to normality if they can. Our communities, consumers and customers are looking for leadership, for truth-tellers and for counsel.

With the right framing both Government and commercial organisations should continue to launch products and services; should continue to educate, advertise and communicate; and should continue to conduct research. But these things need to be done in an informed and considered manner and all activities must be contextualised to the current environment...which is really what should happen anytime.



In summary, it is rarely good for organisations to “go dark”, both for the long-term impact it may have on the organisation as well as the negative effect by generating a sense of being perceived as silent, inert or slow to act during times of crises. However, framing is paramount and a delicate balance must be struck to be sure to convey the purpose of the activities and why these normal commercial functions are still important in such an abnormal world.



*“This is no time to abandon your customers”*

Robert Morgan, Executive Chairman of  
Clemenger BBDO

# FOR MORE INFORMATION, PLEASE CONTACT

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