

QUANTITATIVE REPORT

Re-emergence Sydney and Melbourne Poll

Quantitative market research study amongst 500 community members in Melbourne and Sydney.



A member of the Assembled Group



OCTOBER 2021



Research Objectives and Approach

To measure how consumers expect to change their behavior when life after lockdown re-emerges in Sydney and Melbourne.



The research is designed to address the following objectives:

1. Understand what consumers are most looking forward to when lockdowns ease and retail, café and services open up in COVID-normal trading
2. Measure what has been most frustrating and difficult for consumers when shopping for products and services during lockdowns and identify implications for brands as lockdowns ease.
3. Identify how has COVID-19 situation changed consumer brand choices when it comes to choosing which brands to purchase.

The Approach:

A consumer poll was conducted in Melbourne and Sydney amongst all people aged 18+ recruited through the TEG online panel. A total of n=514 Australians participated in the survey which provides a high degree of data reliability at the 95% confidence level the margin of error rate is +or- 4.33%.

The fieldwork was conducted between Friday 1st October 2021 to Monday 4th October 2021.

SAMPLE PROFILE		%	n
Gender	Male	49%	253
	Female	51%	261
Location	Sydney	48%	249
	Melbourne	52%	265

Total sample; Base n = 514

Close to 6 in 10 looking forward to freedom to shop and browse instore

Q. When lockdowns ease and retail, café and services open up in COVID-normal trading, what are you most looking forward to?



Significant differences indicated with an arrow up or down

Base sample n=514

Base sample Melb n=265, Sydney n=249

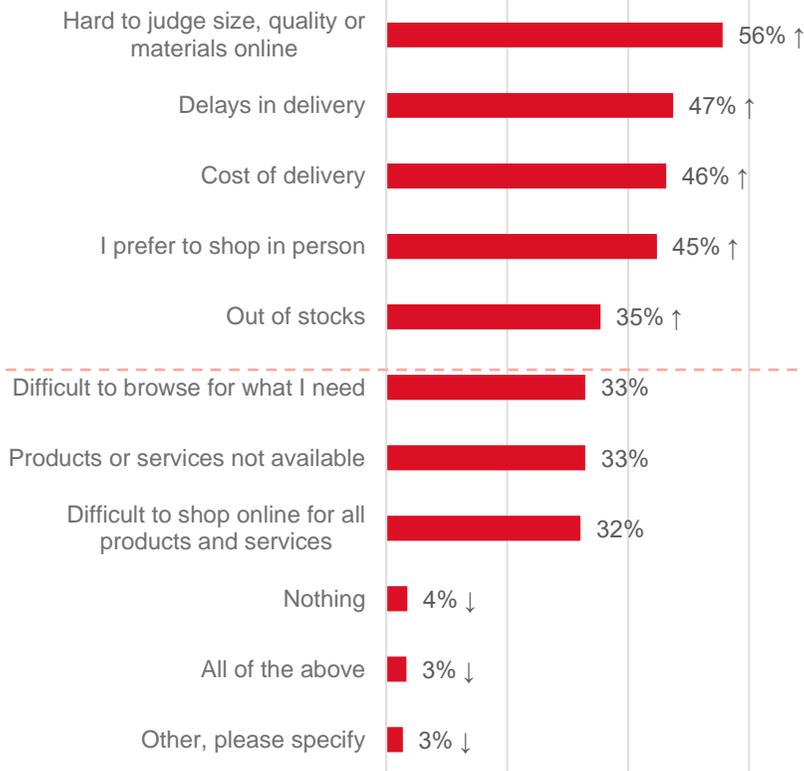
- New research amongst Sydney and Melbourne residents indicate that Australians are longing for retail, cafes and services to open up after an extended lockdown with 6 in 10 looking forward to having the freedom to shop and the ability to browse in store.
- Close to 1 in 2 are looking forward to trying on products, to feel the quality of products through instore displays and merchandising which has been a frustration during lockdown.
- 42% of shoppers are looking forward to the physical experience of shopping in person, indicating the importance of experiential instore activations and customer service.
- 39% are looking forward to making purchase decisions based on what they can see is in stock, which is driven by frustrations experienced over stock availability online.
- Results were consistent by gender, age groups and locations in Melbourne and Sydney.

An opportunity for brands and retail to offer customers freedom to browse, and experience the instore shopping environment when stores open.

47% of shoppers have had frustrations with online delivery delays

The biggest frustrations of lockdown on shopping behaviours is difficulty purchasing clothing and household items that require judgement on quality, size and materials, delays in delivery and cost of delivery.

Q. Thinking about shopping for products and services during lockdowns, what has been most frustrating or difficult?



Base sample n=514

Significant differences indicated with an arrow up or down

- Frustrations experienced by shoppers in Sydney and Melbourne during lockdowns are expected to boost retail and services trade when restrictions ease.
- With close to half of all people experiencing delays in delivery and frustrated by cost of delivery, this would indicate there will be demand for bricks and mortar stores, as shoppers will value the availability of product and convenience of shopping in-store.

64% of 18-29s are frustrated about the cost of delivery
(significantly higher than the national average of 46%)

61% of over 60s prefer to shop in person
(significantly higher than the national average 45%)

Other Frustrations experienced by shoppers

Other Frustrations : Sydney

"Prices"

"Other shoppers not wearing masks or social distancing"

"Having to go to a post office to collect"

"click and collect fees or minimum purchase price"

"Trying on for size and fit"

"Driving to a regional area for shopping"

Other frustrations : Melbourne

"Limited suppliers for product I'm searching for"

"Quality ordering online"

"Wrong products delivered"

"people who don't QR code and don't wear masks"

"wrong item sent"

"not being able to shop"

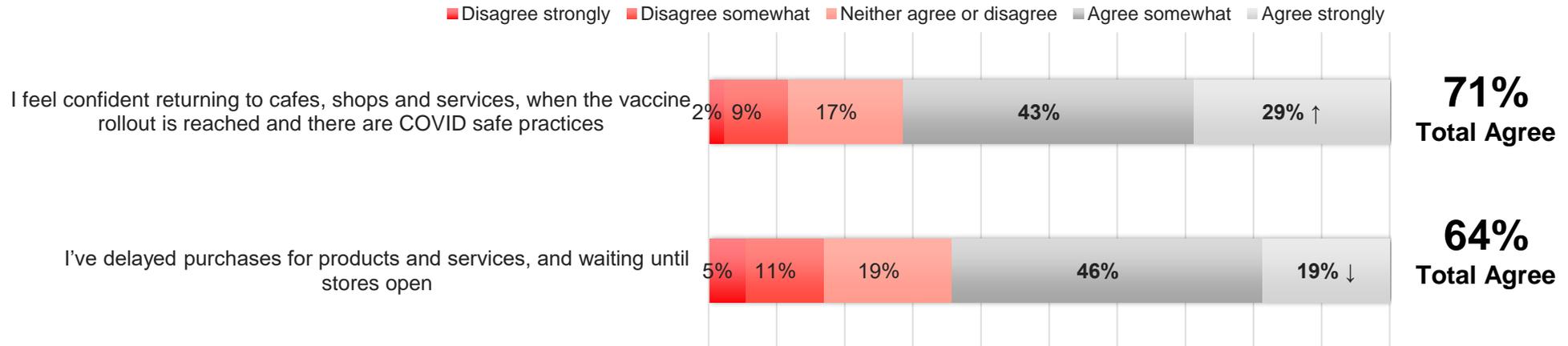
"the return process"

"selling stuff and waiting for people to rock up after lockdown to pick it up"

64% of shoppers have delayed purchased

The impact of COVID-19 on shopper behaviour has led to more than 2 in 3 delaying purchases until stores are open, due to a range of frustrations with online shopping including delivery delays and cost of delivery.

How much do you agree or disagree with the following statements in relation to products and services opening up when restrictions ease.

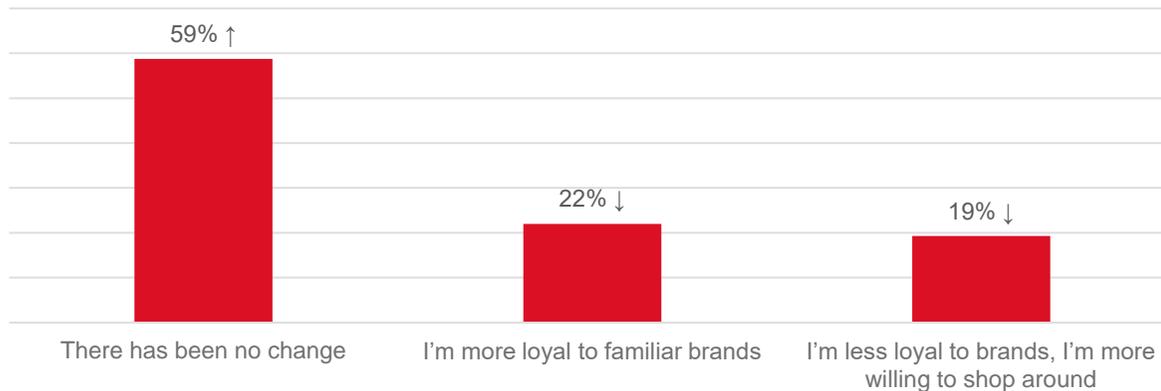


With more than 2 in 3 shoppers in Melbourne and Sydney holding back on making purchases, we expect there to be increased demand for retail stores and services when restrictions end.

The majority of shoppers (71%) feel confident returning to cafés, shops and services when Australia reaches the vaccine rollout and there are COVID safe practices in place.

More than 1 in 5 are now more loyal to familiar brands post-lockdown

Q. How has COVID-19 situation changed your brand choices when it comes to choosing which brands to purchase?



Base sample n=514

Column %	Location		Age				
	Sydney	Melb	18-29s	30-39s	40-49s	50-59s	60 + over
I'm more loyal to familiar brands	21%	23%	22%	28%	26%	25%	13% ↓
I'm less loyal to brands, I'm more willing to shop around	22%	17%	26%	27%	20%	18%	9% ↓
There has been no change	57%	60%	52%	45% ↓	54%	57%	78% ↑
Column n	249	265	89	116	96	65	148

Significant differences indicated with an arrow up or down

- The research has identified that COVID-19 has made more than 1 in 5 shoppers in Sydney and Melbourne more loyal to familiar brands, as a result of lockdown, many shoppers are choosing to stick with trusted brands.
- 19% of shoppers are now less loyal to brands, and more willing to shop around as a result of COVID-19. This indicates there may be a level of brand switching and experimentation due to availability of products and many trialling new brands, which is driving lower levels of loyalty.
- 59% of shoppers stated that there has been no change to their brand choices.
- Younger shoppers are more likely to have lower levels of loyalty to brands as a result of COVID-19, with 26% of 18-29s now less loyal and 27% of 30-39s less loyal/

Brands will need to win back shoppers who may have experienced new shopping behaviours during lockdown due to product availability and online options. A need to communicate a relevant and motivating position to your customers through marketing efforts.

For more information on this report or to find out how your customers have been impacted by COVID-19 contact:

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