# COVID-19 RECOVERY TRACKER

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ORIMA RESEARCH

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COVID-19 RECOVERY TRACKER

**David Bruce**
Partner
Canberra
T: 02 6109 6300
E: david.bruce@orima.com

**Paulina Hryniewiecka**
Senior Research Consultant
Melbourne
T: 03 9526 9000
E: paulina.hryniewiecka@orima.com

| General Enquiries | Media Enquiries |
|---|---|
| CRT@orima.com | **Szymon Duniec**<br>Managing Director<br>Szymon.Duniec@orima.com |


# **About** the project

The **COVID-19 Recovery Tracker (CRT)** was implemented in April 2020, shortly after the COVID pandemic first directly impacted Australian society, to measure both the acute impact and then track the speed and consistency of our recovery over coming months and years. The project was deliberately called the 'recovery' tracker for this reason, and questions deliberately written to be relevant both as the pandemic hit and long into the future.

The project aggregates data from multiple surveys to provide a comprehensive overview of how the Australian community is affected. There are two primary sources of data, with all responses combined into an overall database and population weighted results reported fortnightly and monthly:

- A core set of CRT questions appear as a module in a number of monthly national online tracking surveys (average monthly sample n=1,000).
- A longer dedicated online CRT survey is completed by a fortnightly nationally proportional sample of 200 people, plus any additional respondents who complete the publicly accessible version (see link below). Data is weighted to major demographic characteristics on a fortnightly basis.

The CRT results are available to track and understand how the Australian community is handling the experience and impact of the Pandemic, and to create benchmarks that can be used to interpret other survey results when selected CRT questions are also included. CRT data is used for benchmarking survey respondents and target audiences, and in all cases where it has been used, there has been an interaction seen between key CRT indicators and the subject matter of the client surveys.

As of 23 July 2021 report, a total of **24,250** respondents have completed the core questions, with **8,239** who have completed the full extended survey.

This update contains a snapshot of the most current results. Current and historical updates can be found on the ORIMA website (see below).

## **CRT Links** and resources

View or complete the full **online CRT questionnaire**: https://research.orima.com.au/COVIDRecovery/

Search and download **CRT Results and Updates** from the publications tab: https://covidportal.orima.com.au/

## **Use of** this material



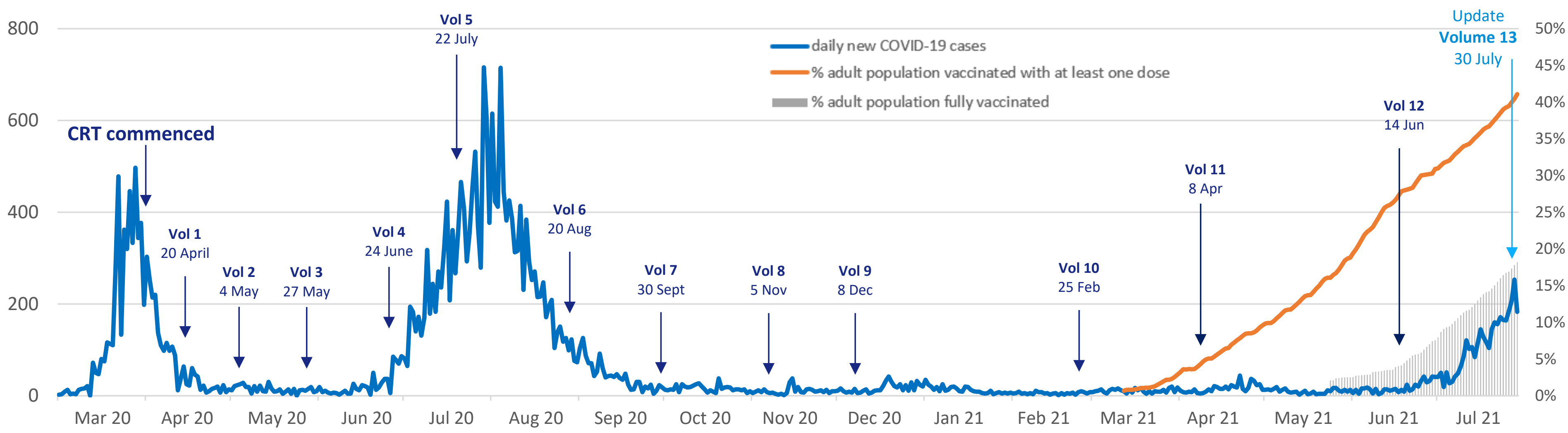
For additional information, interpretation and analysis, please contact the project managers listed above.

# Methodology

## Data sources:

| | |
|---|---|
| Core Module in monthly national tracking surveys: | n=16,011 |
| Extended online version with fortnightly samples: | n=8,239 |
| **Total** | **n=24,250** |

## CRT Timeline mapped against daily COVID cases, and vaccination progress in Australia



Source: ourworldindata.org

# What the current results are telling us

- Since the Sydney outbreak in June 2021, Australia's national mood has entered a fourth phase – a dramatic decline and reduction in confidence in leadership.

- Current results across CRT indicators are the lowest seen in the community since mid-to-late 2020 when Victoria was in the grips of its second wave and extended lockdown.

- Satisfaction with the response of the Governments (Federal and States) has fallen since February 2021, and then more quickly as the Sydney outbreak in June 2021 took hold and spread. Trust in leadership has also declined, and so too has the proportion of the community who have more respect for the complexity of government decision making, suggesting the community is now also less prepared to give governments the benefit of the doubt.

- Vaccination rates are accelerating, with those keen and willing to get vaccinated increasingly doing so. Meanwhile, the proportion of those in the community who are hesitant or resistant to the vaccine remains steady, and therefore this group makes up a bigger proportion of unvaccinated people.

- Use of the term "*the jab*" is especially off-putting to the exact key segments of the community who are least committed to getting the vaccine, compared to other language such as just "*getting vaccinated*".

# Sections

# Community Mood & Impact

Since the Sydney outbreak in June 2021, Australia's national mood has entered a fourth phase, which is a dramatic decline (and loss of confidence in leadership see next section).

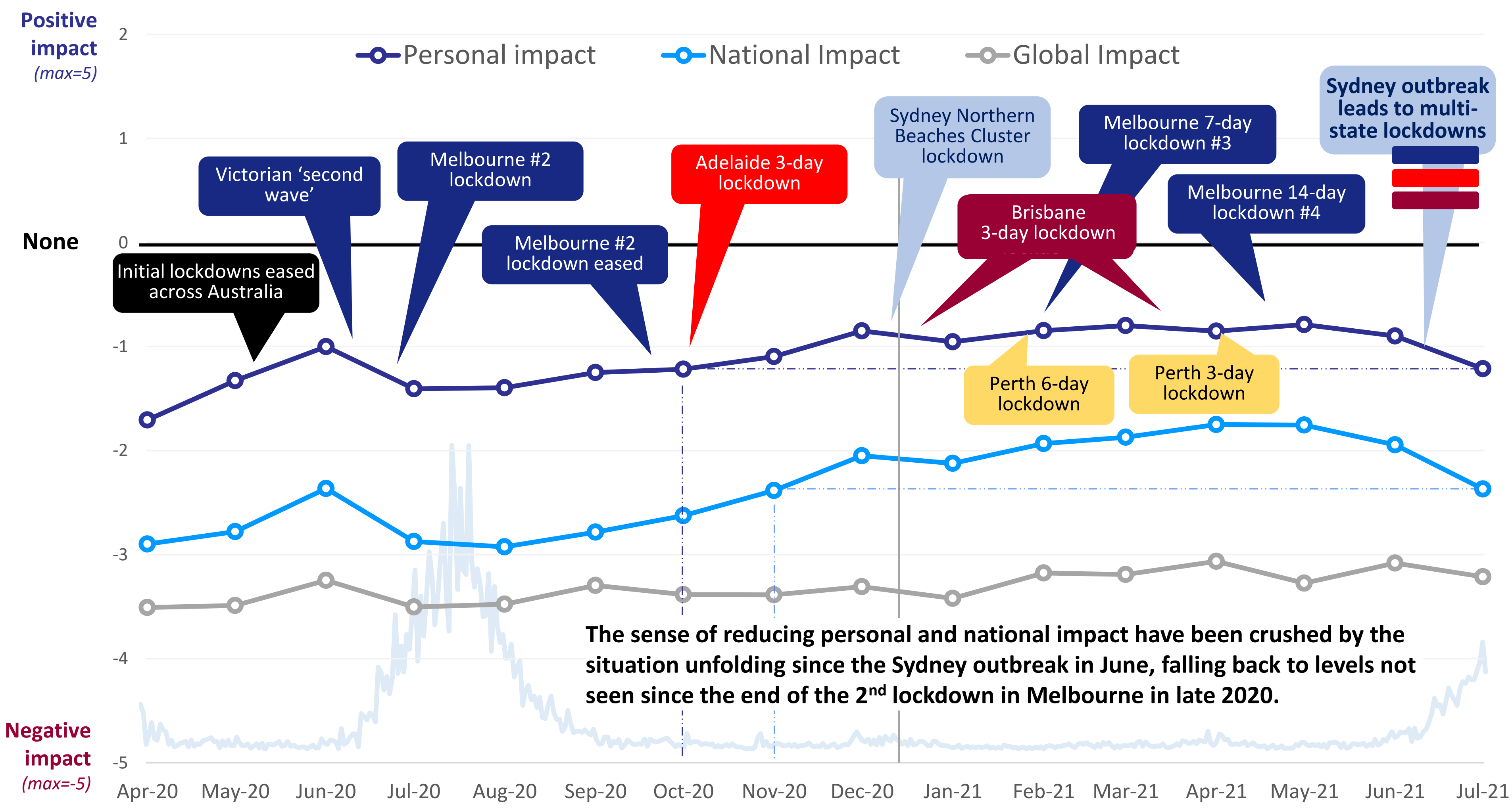
Phase one was a two-month recovery from the shock of the first impact, followed by a first sharp decline as the reality of the 'second wave' in Melbourne sunk in (phase two). From August 2020 to May 2021 phase three saw a slow but steady improvement, notwithstanding the occasional localised setback. State-by-state impact tracking picked up the effect of short-term lockdowns, but the overall trend was gradually positive, both in terms of impact and mood.

That changed in June and July 2021, with a fourth phase now seeing almost every CRT indicator again decline sharply. Almost all impact and mood indicators are at their most negative levels since mid/late 2020, following some of the most rapid changes observed in the data since the CRT commenced.

The CRT data now suggests that recent developments in the pandemic have resulted in a fractured and sceptical community that is losing confidence in local and national leadership, and is feeling sharply more impacted.

# **Perceived Impact** of COVID

## Right at the moment, what do you feel the impact of the COVID-19 situation is…




Source: ORIMA.com.au

# **Perceived Impact** of COVID

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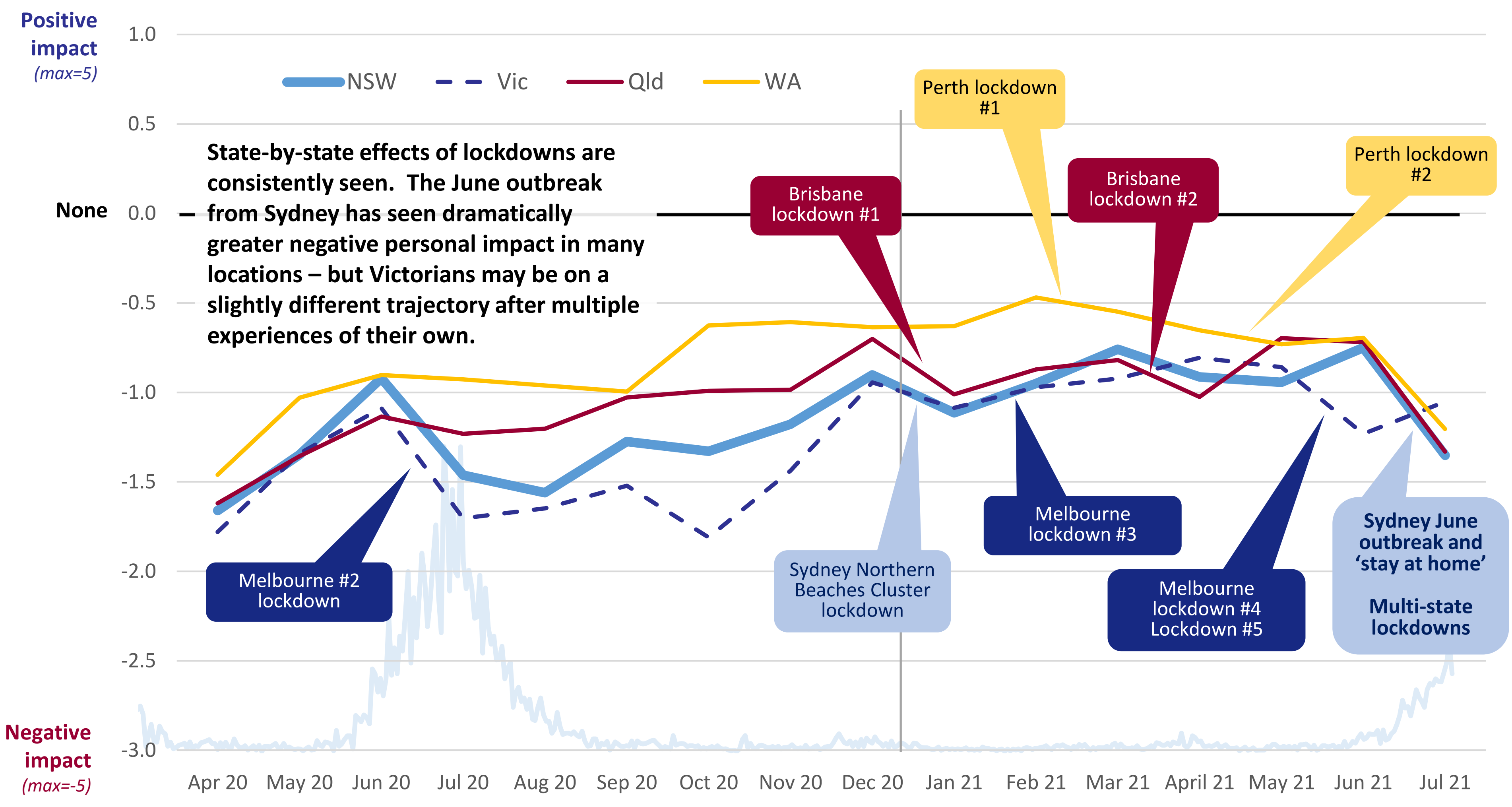
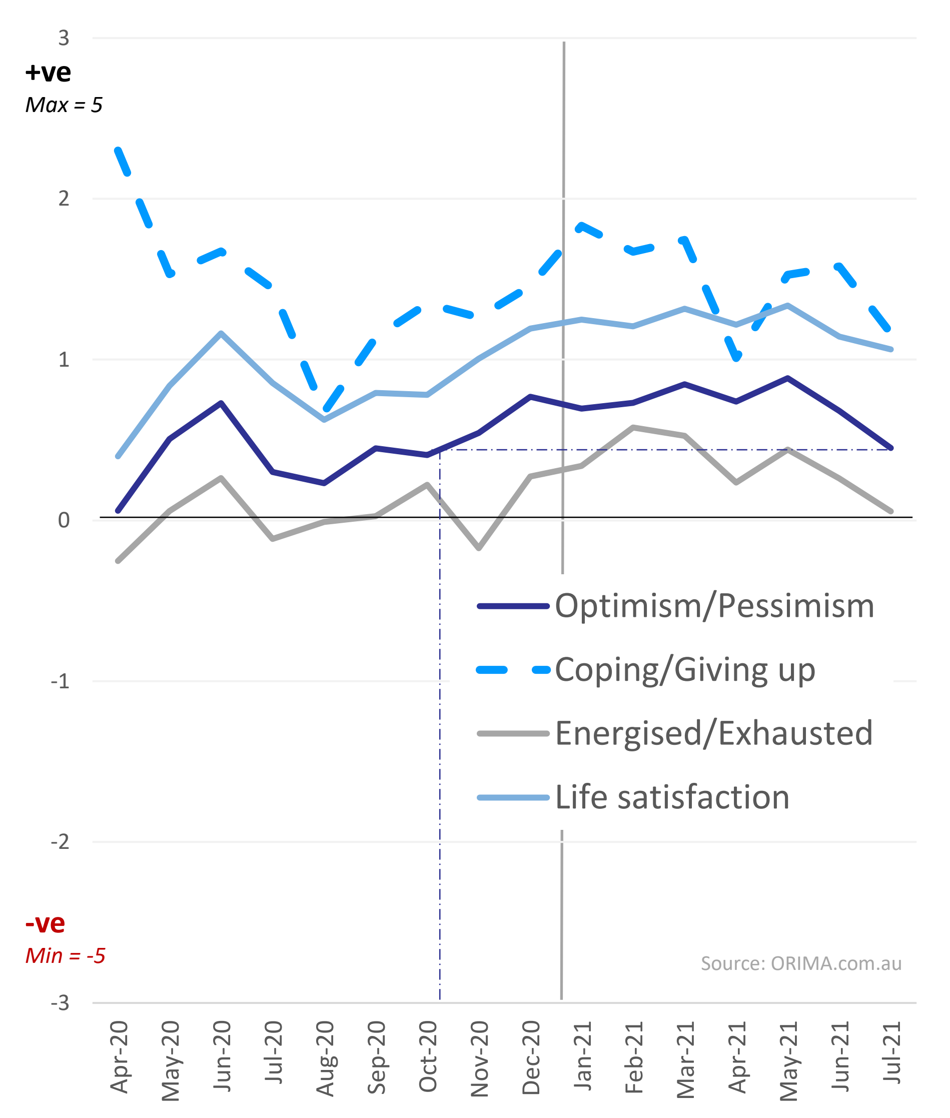


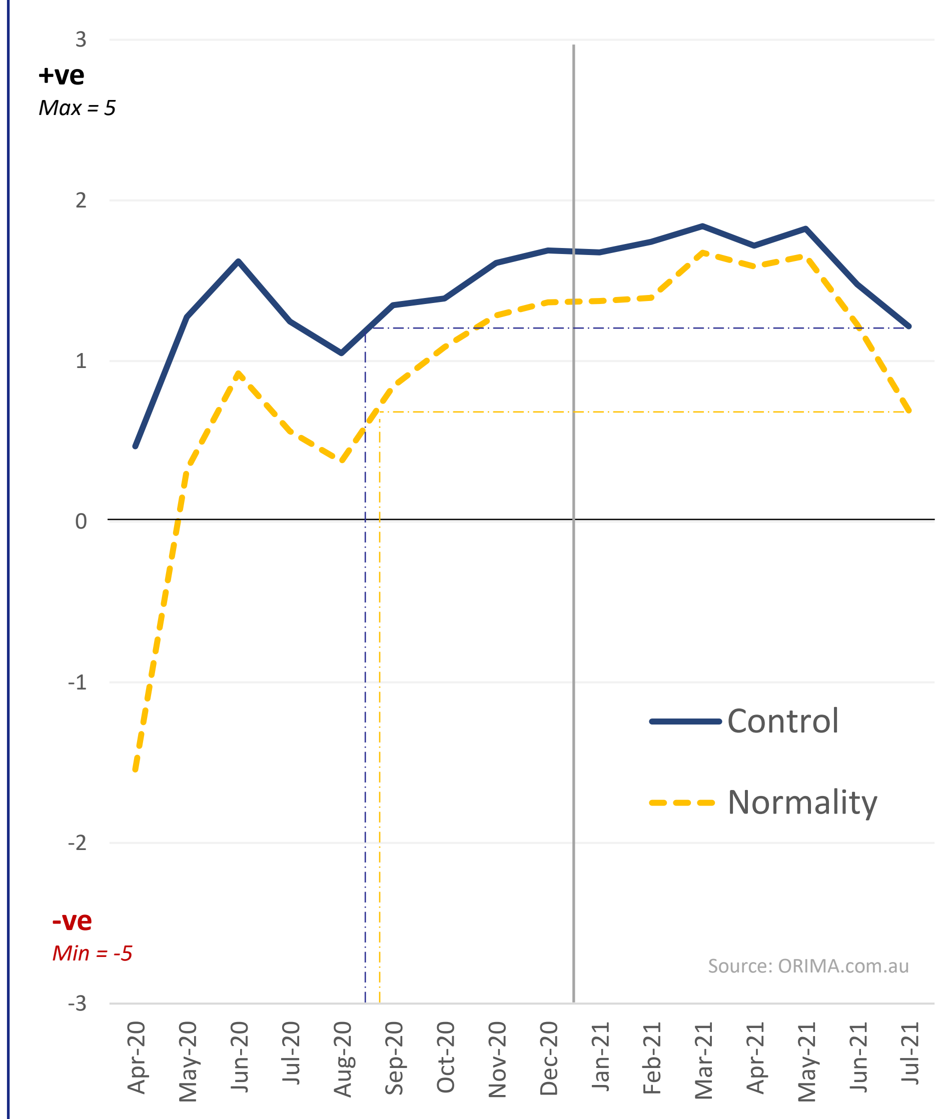

Source: ORIMA.com.au

# Much of the overall sense of control and normality that had built up in recent months has been lost.

## Coping, Optimism and Wellbeing

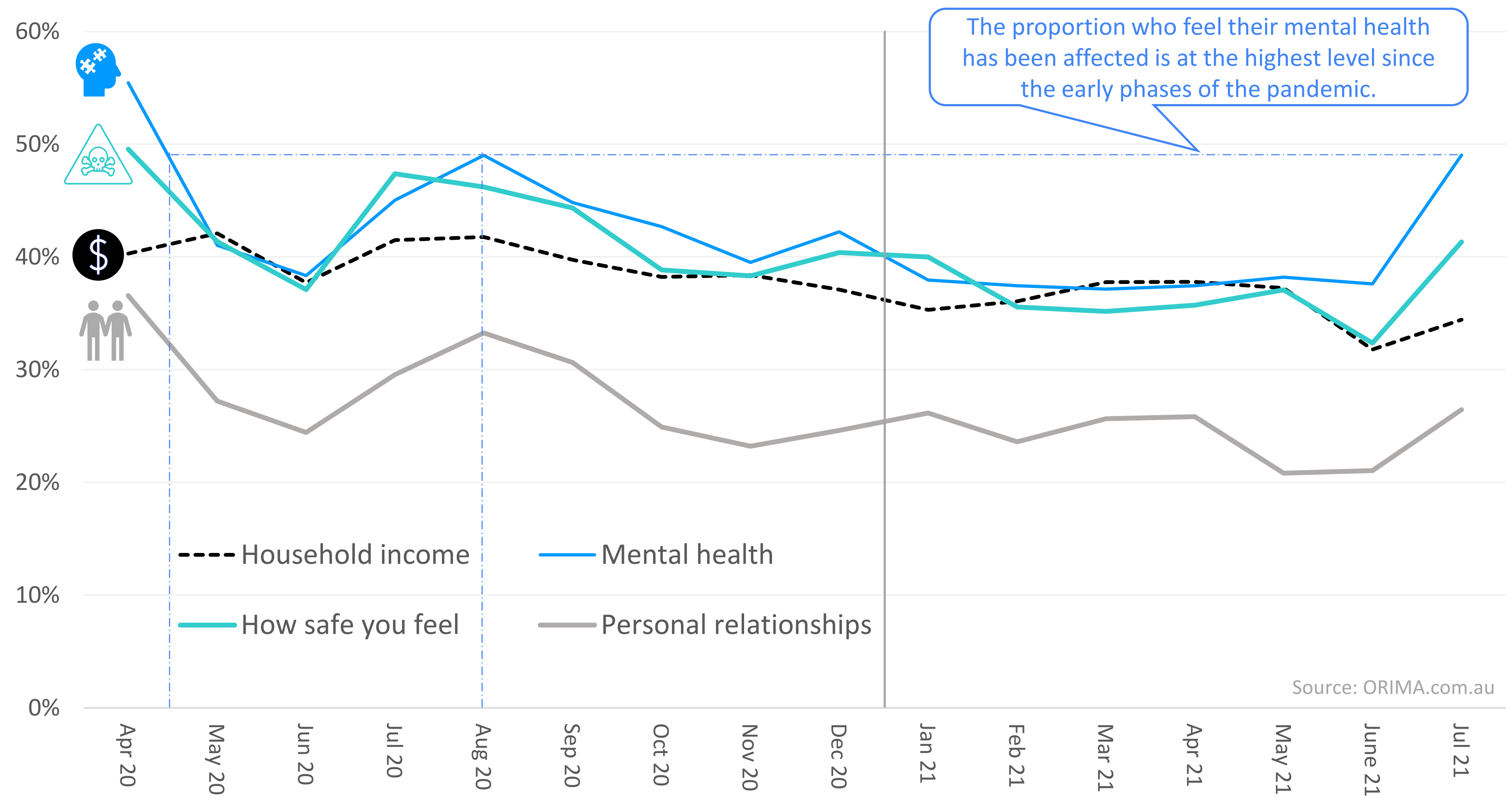



## Control and Normality



Throughout June / July, as Australians again report feeling more negatively impacted by COVID, less in control, and living lives that feel less normal, they also report feeling much more negatively impacted in other ways, especially in terms of mental health, sense of safety, and personal relationships.

## Proportion who have experienced a negative personal experience related to:



# Government Response

The first few months of 2021 had seen a continuation of a phase during which Australians were feeling less negatively impacted. However that has fallen away sharply in June and July as the delta strain of the COVID-19 virus escaped into the community.

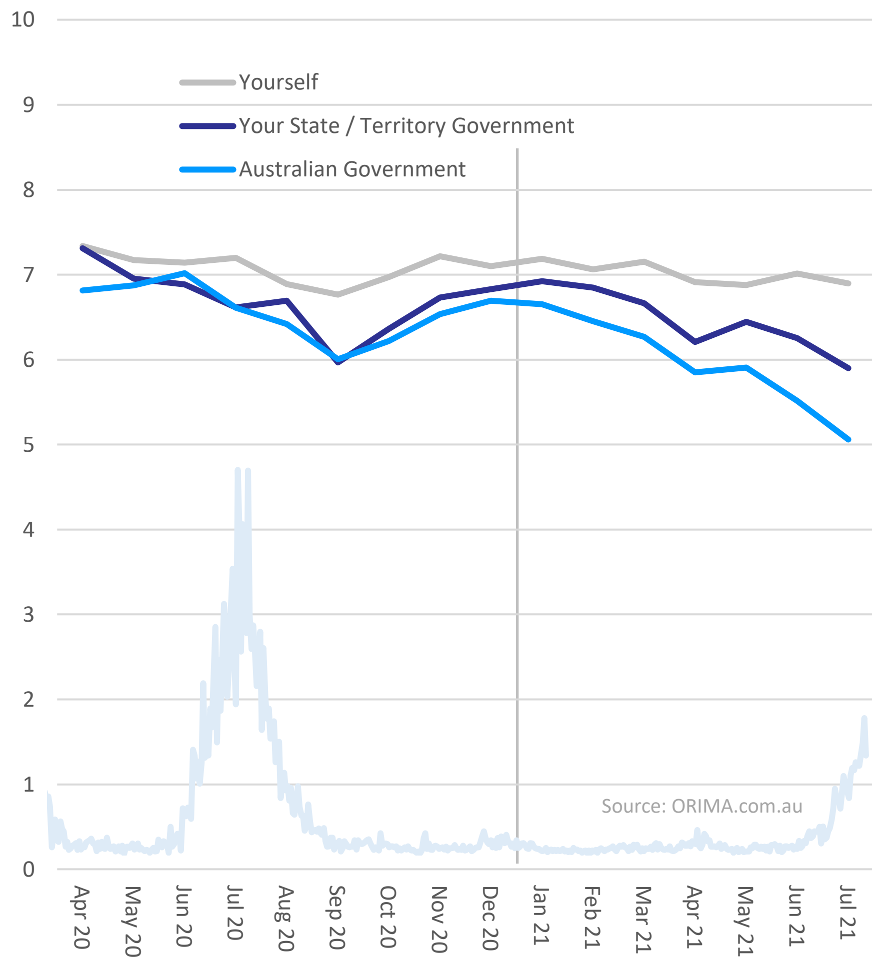
Satisfaction with the response of all governments, state and federal, has fallen off sharply in July. However, satisfaction with the state and federal government response to COVID-19 actually started falling much earlier than the recent outbreak – with satisfaction dropping steadily since a peak in January, when the vaccination strategy was first announced. The steepest fall in satisfaction has been in relation to the Australian Government response, but is also apparent for each of the state and territory governments.

Unsurprisingly, the sense of trust in leadership fell in lockstep with response satisfaction.

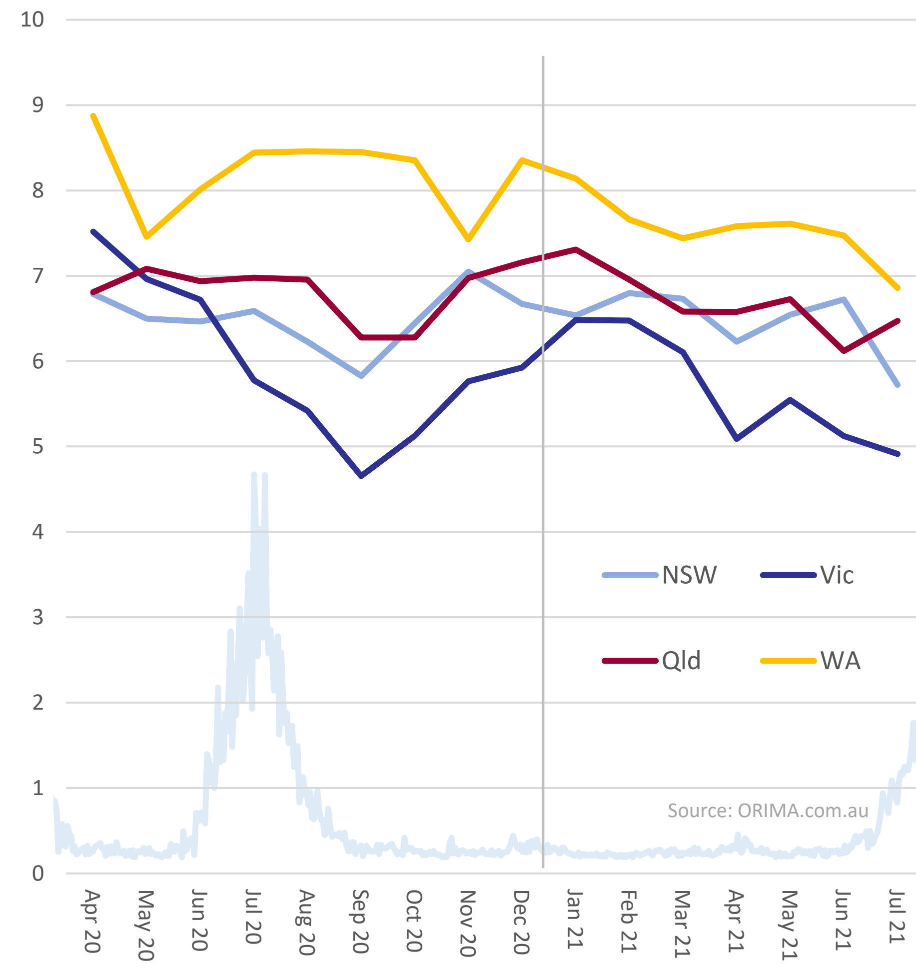
More interestingly though, the community appears to also be cutting governments little slack in terms of the challenges they face. At the start of the year, around half the respondents thought that one of the effects of COVID-19 on Australia was that the community had developed a greater respect for the complexity of government decision making. By July, this proportion had halved, falling to around a quarter. This suggests that there is a diminishing sense in the community that the complexity of the situation is justification for perceived shortcomings in government responses.

Community perceptions of the response of governments at both state and federal level have all fallen away since the start of the year, and the declines have accelerated in the last few months. Interestingly, people still rate their own response similarly to the start of the pandemic, suggesting that most people feel they are (more or less) consistently ‘doing their bit’.

## How would you rate the response to the COVID-19 pandemic from…

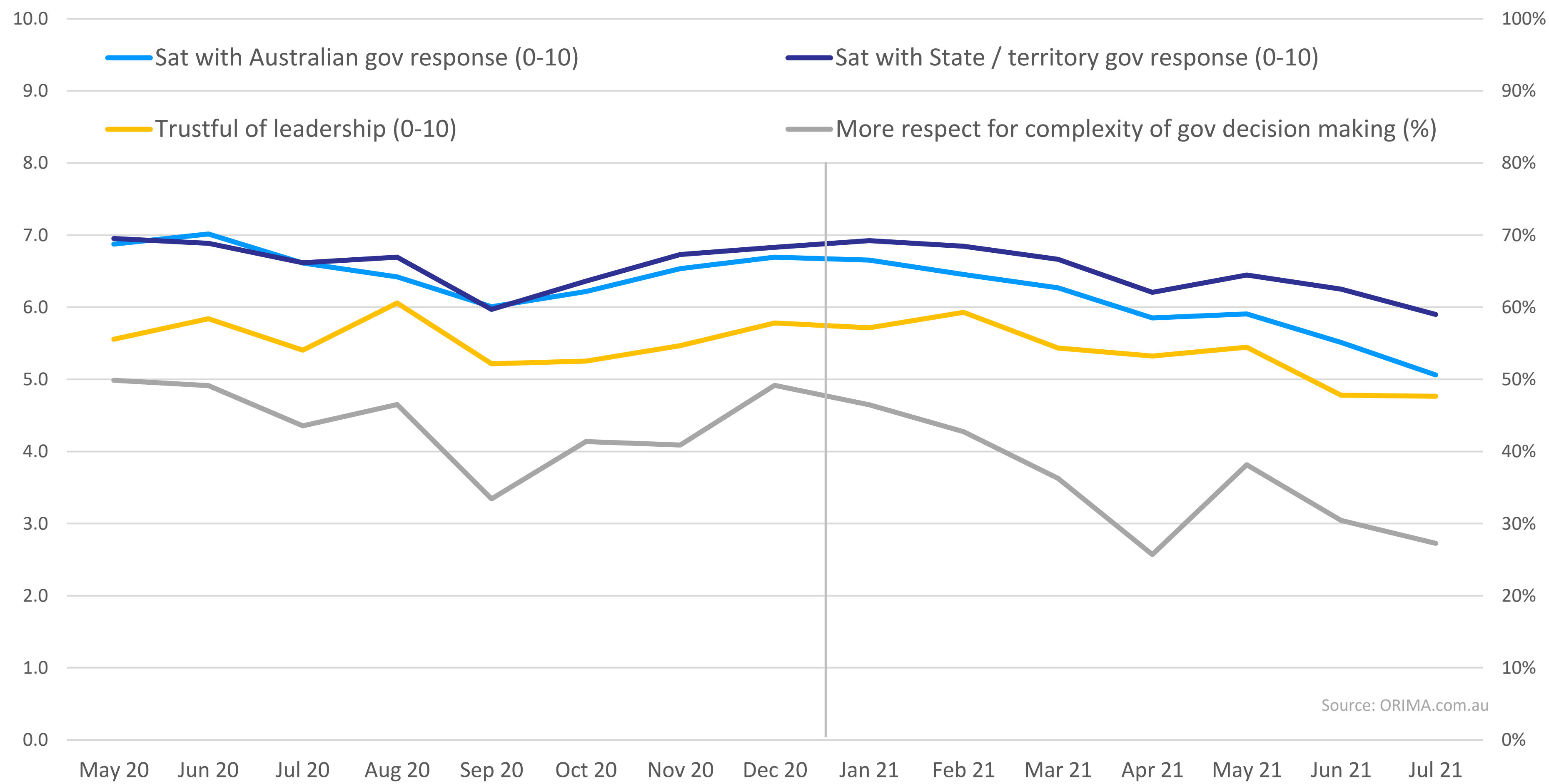



## How would you rate your State / Territory Government's response to the COVID-19 pandemic?



As satisfaction with government responses to COVID-19 declined in 2021, so too has the sense of trust in leadership. At the same time, the sense that the community has more respect for the complexity of government decision making has also fallen away sharply. At the start of the year nearly half the respondents thought that through the pandemic people had developed greater respect for the complexity of decisions governments had to make. By July, barely more than a quarter of respondents still felt this way.

## Satisfaction with response, trust in leadership, and respect for complexity in decision making



# Vaccines

Reported vaccination rates have picked up since late June, and there remains a ready and willing segment of the unvaccinated community waiting to be vaccinated.

As at the end of the fortnight ending 23 July a total of 39% of respondents had received at least one dose of a vaccine, and 15% had received two doses. This is in line with the official figures of 39% and 16% respectively. A further 26% of the adult population are readily open to being vaccinated.

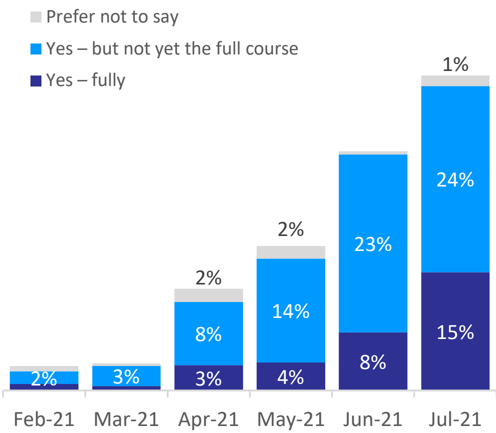
However, the proportion of the community who are not intending to get vaccinated or are waiting to see how it goes before deciding what to do has remained largely stable (31% of the adult population).

Looking only at those currently unvaccinated, 22% will make an effort to get it as soon as possible and 26% will do so when it's practical or when they get around to it – a total of 48% of the unvaccinated adult population who are open to getting a vaccine. 23% are 'hesitant', waiting to see how things go before deciding, and 26% are 'resistant'.

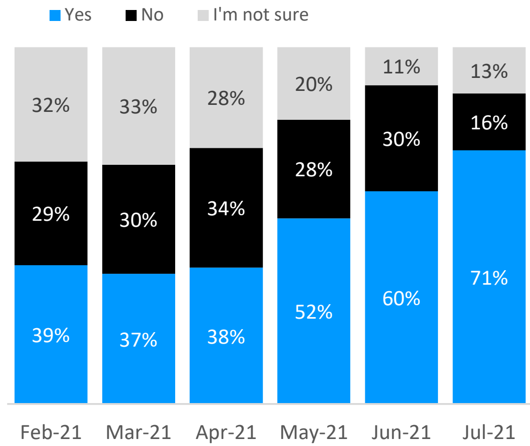
Perceptions of vaccines in terms of effectiveness and safety haven't greatly changed at a community level. However, perceptions of the vaccines *being available in a fair way to all Australians* has fallen sharply, at 44% compared to 54-56% in May and June. It's possible that what 'fairness' means in the context of vaccine availability may have become a more complicated and multi-faceted concept in July, with inconsistent state-by-state decisions continuing, and increasing discussion of targeting geographic areas.

# CRT Vaccine Dashboard *as of 23 July 2021*

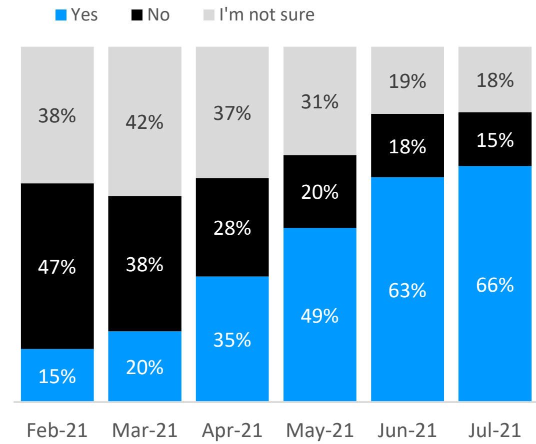
## Have you had the vaccine?




## Are you eligible to get the vaccine?




## Is the vaccine available in your area?




## If unvaccinated, how do you feel about getting a vaccine?

| | *June 21* | *July 21* | *Change since June 21* |
|---|---|---|---|
| Will make an effort to get it ASAP | 29% | 22% | *-7pp* |
| When practical / convenient | 20% | 20% | *0pp* |
| When I get around to it | 8% | 6% | *-2pp* |
| Wait and see | 21% | 23% | *+2pp* |
| Only if I have to | 7% | 11% | *+4pp* |
| Don't intend to | 10% | 15% | *+6pp* |
| *Prefer not to say* | 6% | 2% | *-4pp* |

## Totally + Mostly believe vaccines will…

| | *June 21* | *July 21* | *Change since June 21* |
|---|---|---|---|
| Be available in a **fair** way | 54% | 44% | *-11pp* |
| **Effective** in preventing COVID-19 | 47% | 46% | *-1pp* |
| Be **safe** to take (minimal side effects) | 48% | 44% | *-4pp* |
| Prove to be **safe** in the long term | 44% | 42% | *-2pp* |
| Taken by enough to **protect community** | 40% | 44% | *+4pp* |
| Let your life get **back to normal** | 49% | 48% | *-1pp* |

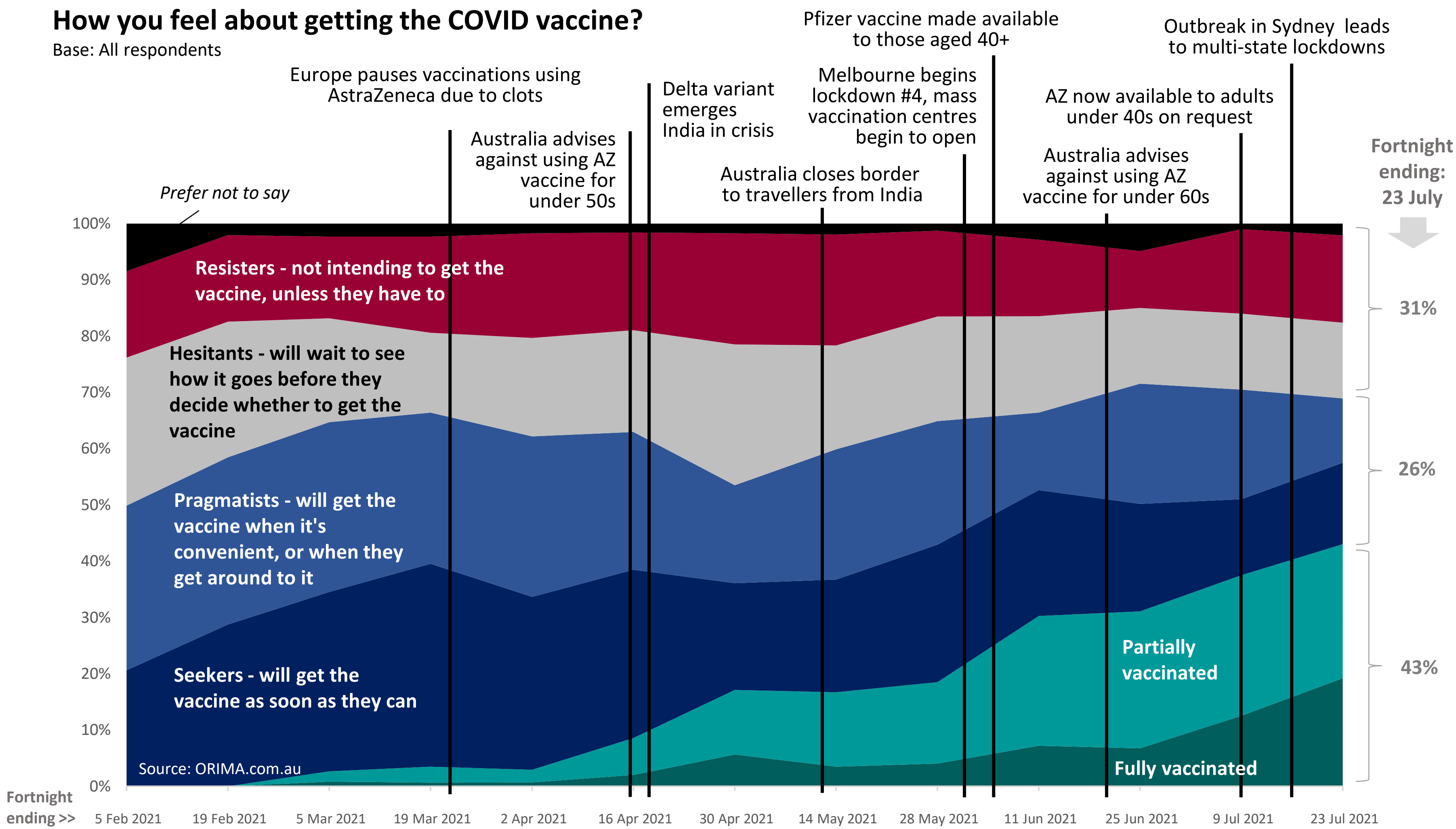
Source: ORIMA.com.au

**July month-to-date** results showed 39% of respondents had had at least one does of vaccine (including 15% who were fully vaccinated). Official figures for the same time were 39% and 16% respectively.

## Vaccination Intentions – fortnightly data

### How you feel about getting the COVID vaccine?

Base: All respondents




Source: ORIMA.com.au

**Note:** Jan 2021 sample size very small (n=64) as vaccine questions were only added to the CRT just before the vaccination program began

# Language

Both practical and academic research has consistently shown the importance of language in government messaging. However, early in the vaccination program media interests took control of the language that was used, adopting the more emotive term "*the jab*" for being vaccinated.

It is well known that in the community there are segments who are sceptical of vaccinations, others who are fearful of injections, and others still who may be open to vaccinations generally but are uncertain about the safety of the COVID-19 vaccines. It immediately seemed evident that calling something "*the jab*" risked negative connotations for both groups. However, since early in 2021, this language has become habitual and widespread.

Recent early results from testing the appeal of different terminology in the CRT suggests that this language makes little difference for people who have a strong opinion about getting vaccinated or not getting vaccinated – but it *is* important for those people whose vaccination inclination is most contestable. Simply put, those who are most uncertain find the language of "*being jabbed*" much more unappealing compared to "*being vaccinated*".

The pattern of results suggests that as the vaccine rollout progresses, continuing to allow the default language of "*the jab*" may be contributing to COVID-19 vaccine hesitancy and slower uptake of the vaccinations.

# **"Being vaccinated"** is considered to be **much more appealing than "getting a jab"** to all, but especially those who are most on the fence about getting the COVID-19 vaccine

## Use of language

Early on in the vaccination program the media started calling COVID-19 vaccinations "*the jab*", and this language has then become habitual and widespread. However, like much of the overly-emotive language used by media to drive attention and sales, it potentially causes significant negative unintended consequences. Predictably, the important segment of the community most uncertain about the COVID-19 vaccine do not like the unpleasant nickname.

Falling into the habit of calling vaccination "*the jab*" may potentially have negative impacts on vaccination rates.

| How appealing are these to you? | | Seekers | Pragmatists | Hesitants | Resisters | Vaccinated | Total |
|---|---|---|---|---|---|---|---|
| "Being vaccinated against COVID" | Appealing | 81% | 63% | 28% | 4% | 85% | 60% |
| | Unappealing | 2% | 5% | 26% | 72% | 3% | 16% |
| "Getting a jab" | Appealing | 72% | 44% | 14% | 0% | 71% | 48% |
| | Unappealing | 10% | 22% | 61% | 78% | 11% | 29% |
| Source: ORIMA.com.au | *Sample size* | *123* | *97* | *87* | *82* | *208* | *611* |

Language is relatively unimportant to people with strong opinions, but matters to those who are on the fence.

Those who are keen to be vaccinated, and those who are resistant both find 'being vaccinated' more appealing than 'getting the jab', but the differences aren't particularly major. However, it *is* important for those that could most easily go either way – those who are hesitant, or not immediately rushing to get a vaccine ('pragmatists', who will get it when its convenient or when they get around to it) – both of those groups find *'being vaccinated'* much more appealing than *'getting a jab'.*

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## Thank you

*We would also like to acknowledge and thank all the research participants for their valuable contribution and input into this research.*

# What we do:

### Communications and Marketing Research

- Communication strategy research
- Campaign development and refinement
- Campaign tracking and evaluation
- Information product testing
- Communication audits
- Audience segmentation research

### Client and Stakeholder Research

- Client surveys
- Voice of the customer programs
- Stakeholder perception/relationship management
- ORIMACEM – ORIMA Client Experience Model
- Benchmarking
- ORIMAstep co-creation workshops

### Employee Research

- Employee surveys
- OREEM – ORIMA Employee Engagement Model
- Benchmarking

### Community Research

- Community awareness and attitude surveys
- Community perception tracking
- Audience segmentation research

### Policy Development and Program Management Research

- Exploring potential community reactions
- Testing policy / program options
- Co-designing service delivery approaches
- Impact studies

### Program Evaluations and Reviews

- Development of performance measurement frameworks and indicators
- Multi-method evaluations
- Compliance reviews
- Performance audits/reviews

### Data Analytics

- Actuarial analysis
- Administrative data analytics (Big Data)
- Compliance monitoring, reporting and tools

### Data Portals and Ballots

- Online surveys
- Secure ballot platforms
- Online data collection portals
- Feedback and complaints management systems
- Dashboard reporting

### Aboriginal and Torres Strait Islander Omnibus

- Regular surveys of Australian Aboriginal and/or Torres Strait Islander adults
- Proportional to population coverage of metropolitan, regional and remote communities
- Cost effective survey – only pay for questions asked, not for the whole survey

### Aboriginal and Torres Strait Islander Field Force

- Australia's only nation-wide Indigenous interviewer field force
- 30 interviewers embedded in urban, regional and remote locations across Australia
- Face-to-face surveys and interviewing using tablets
- Qualitative recruiting
- Telephone surveys