ORIMA

COVID-19 RECOVERY TRACKER

Results Update Volume 17

January 2022

orima.com.au

ORIMA

ORIMA

COVID-19 RECOVERY TRACKER

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

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

General Enquiries	Media Enquiries
CRT@orima.com	**Szymon Duniec** - Managing Director 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=500-1,000).
- 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. All respondents are aged 18+.

As of 14 January 2022, a total of **30,298** respondents have completed the core questions, with **10,787** 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

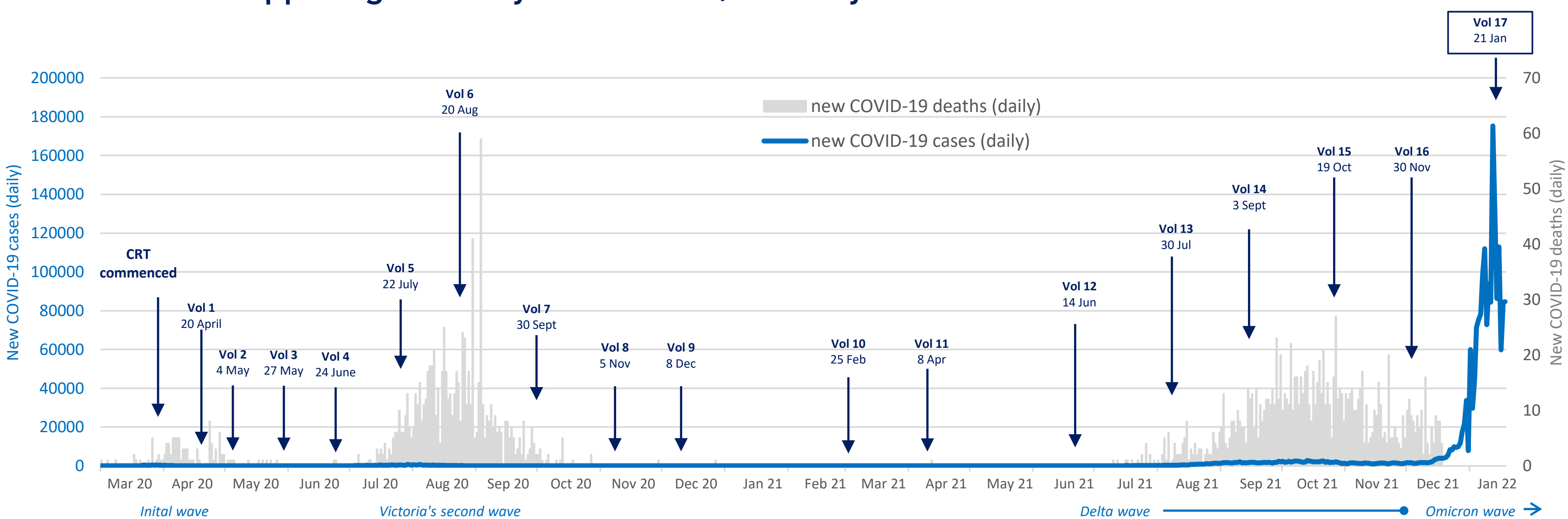
For additional information, interpretation and analysis, please contact the project managers listed above.

Methodology

Data sources:

Core Module in monthly national tracking surveys:	n=19,511
Extended online version with fortnightly samples:	n=10,787
Total	**n=30,298**

CRT Timeline mapped against daily COVID cases, and daily COVID deaths in Australia



Source: ourworldindata.org (current as at 20/1/22)

What the current results are telling us

As was the case at the end of 2020, there was some optimism building across the Australian community heading towards the end of 2021, as the Delta wave waned. However, the rapid emergence and impact of Omicron has seen perceptions of impact, personal experience and mood fall instantly to their lowest levels throughout the entire pandemic. **At no time since the CRT began tracking in the first weeks of the pandemic has the Australian community been at such a low point, or felt so personally impacted**.

A variety of mood indicators have fallen sharply, including optimism and even the sense of coping, which has previously been amongst the most resilient indicators. The speed and magnitude of the fall in **the January 2022 results suggest that the resilience of the Australian community has been greatly depleted** by this cycle.

For much of the pandemic the majority of Australians had no personal experience of someone contracting COVID-19, but **by January 2022 three quarters now know someone who has had it**, including around a quarter who know someone who has been seriously unwell, hospitalised, or died of COVID-19.

Feelings of being **unsafe** have become highly prominent in early 2022, and a **majority of Australians** are currently feeling that their **mental health has been affected**.

Despite the community feeling so negatively impacted, **there remains reasonably consistent comfort around opening up domestic travel**. Comfort around international travel remains lower, but has also not dramatically fallen. However, the confidence people feel about doing a range of lifestyle activities *has* fallen away into January – **reflecting the anecdotal perception that many people are choosing lockdown-like lifestyles.**

ORIMA
COVID-19 RECOVERY TRACKER

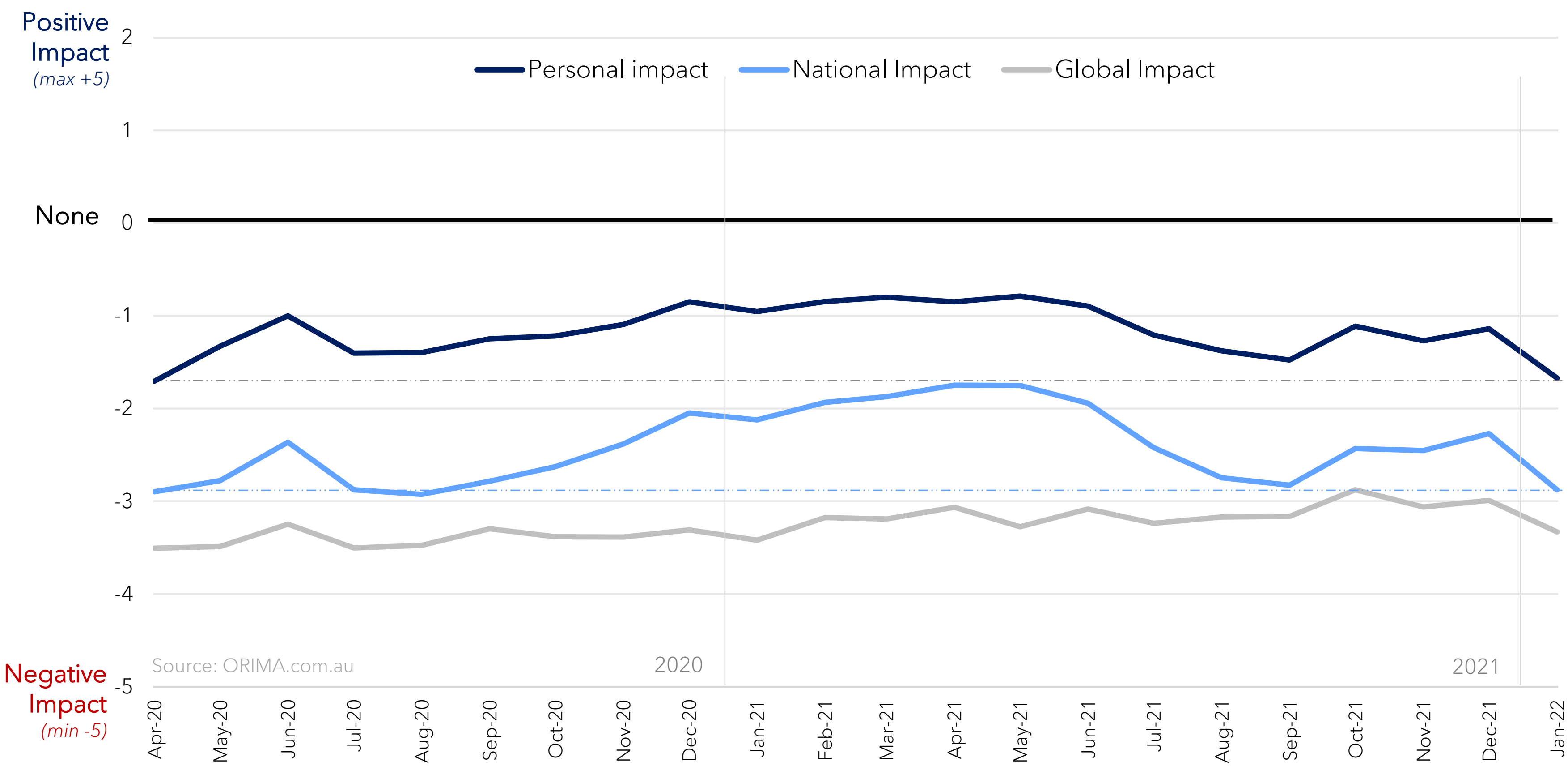
Source: ORIMA.com.au

Current Impact

Perceived Impact of COVID

There are similarities between the end of 2020 and the end of 2021, but also some big differences. Personal and national impact were at similar levels in November 2020 and November 2021. December 2020 saw an optimistic high, followed by a slight dip in January 2021 and then a slow improvement until Delta arrived in June and July. In late 2021 there was again an improvement seen going into Christmas and the New Year – but the impact of Omicron has seen early 2022 perceptions of impact plummet to some of their most negative recorded levels.

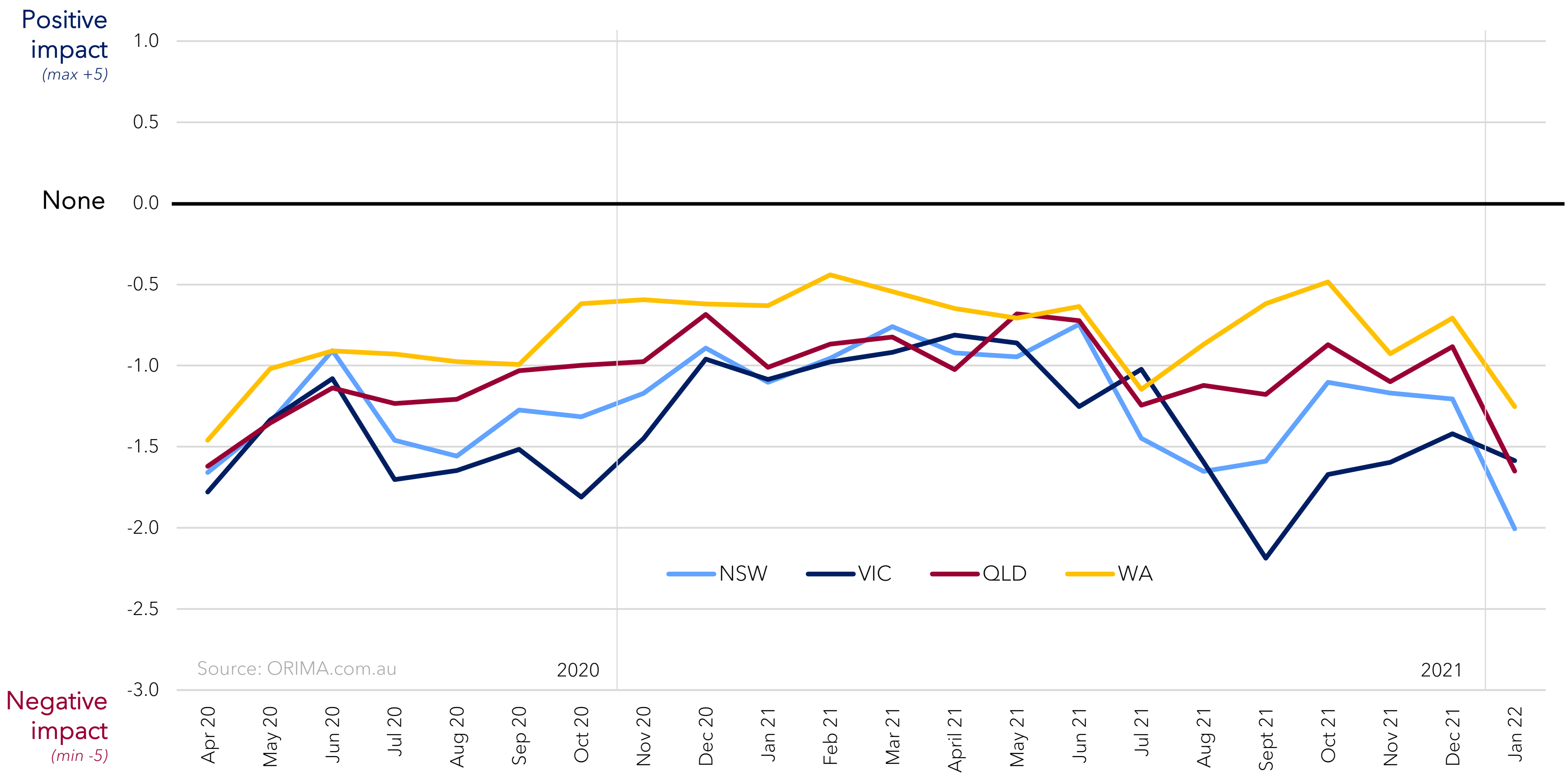
Right at the moment, what do you feel the impact of the COVID-19 situation is…



Perceived Impact of COVID by State

Perceived personal impact is at its most negative level in January 2020 in all states – except Victoria. Victorians are still feeling a very strong negative personal impact, but are actually up off the lows of September 2021. All other states have fallen sharply and to their lowest or equal lowest levels across the whole pandemic in early 2022 (other than the ACT, which has bounced back from lows in a similar pattern to Victoria).

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

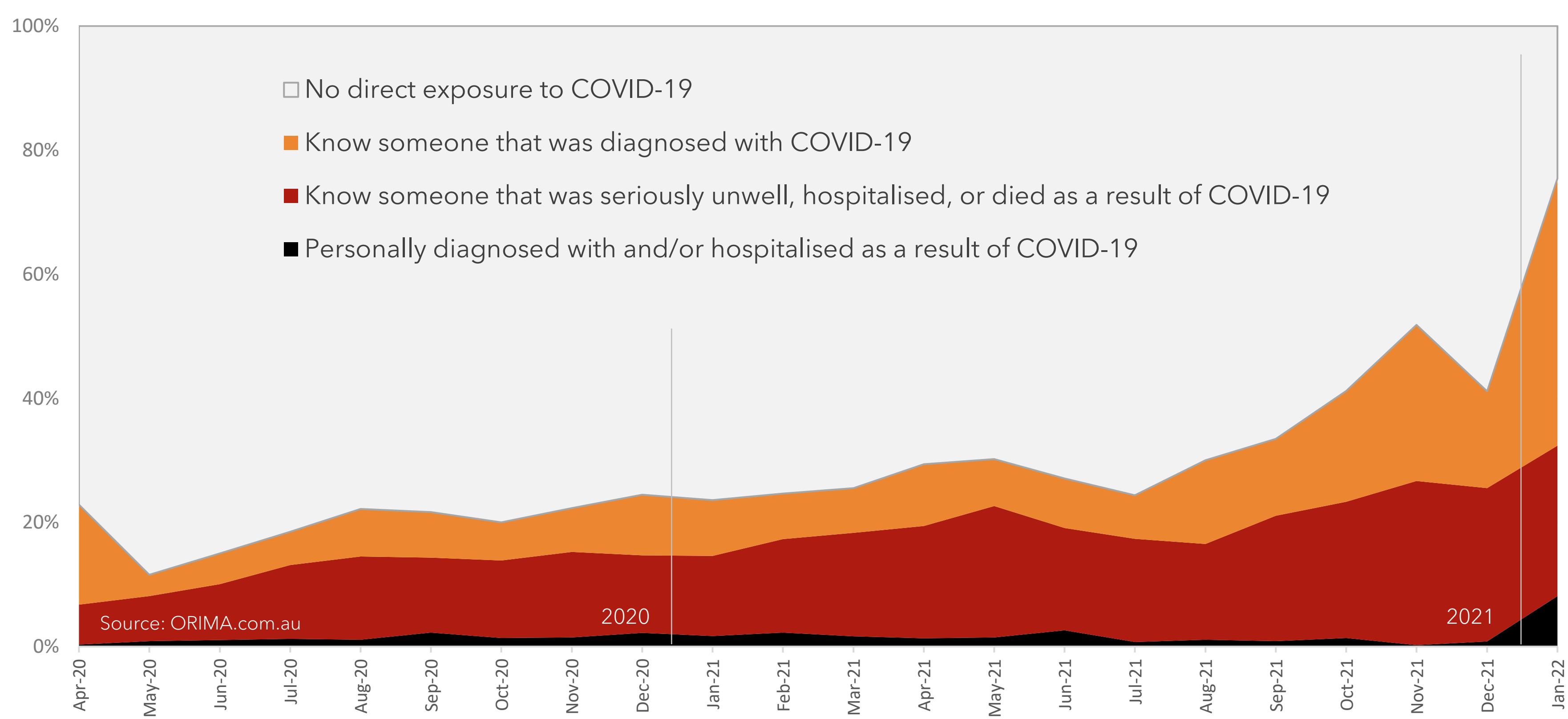


Personal impact and experience

Personal familiarity with COVID

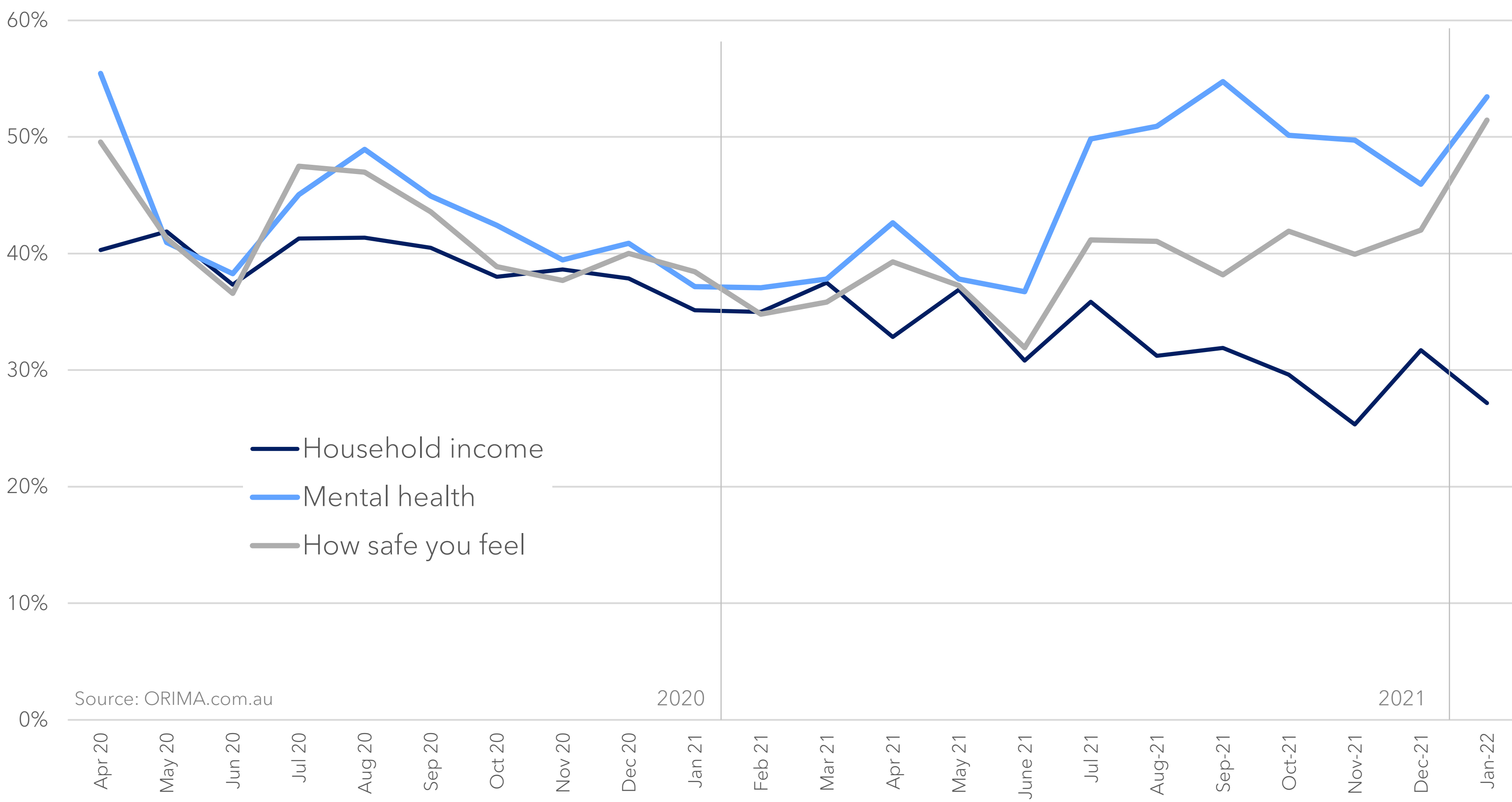
Throughout the pandemic most people had not had any personal exposure to COVID-19 – however the impact of Delta and especially Omicron mean that the great majority of Australians now have first-hand experience of COVID-19 as a disease. In July 2021 – before Delta took hold – three quarters of CRT respondents had no exposure to anyone who had actually had COVID-19. By the January CRT survey, that figure had dropped to just one quarter, with a quarter knowing someone who had been seriously unwell, hospitalised or died from the disease.

Highest personal level of exposure to COVID-19



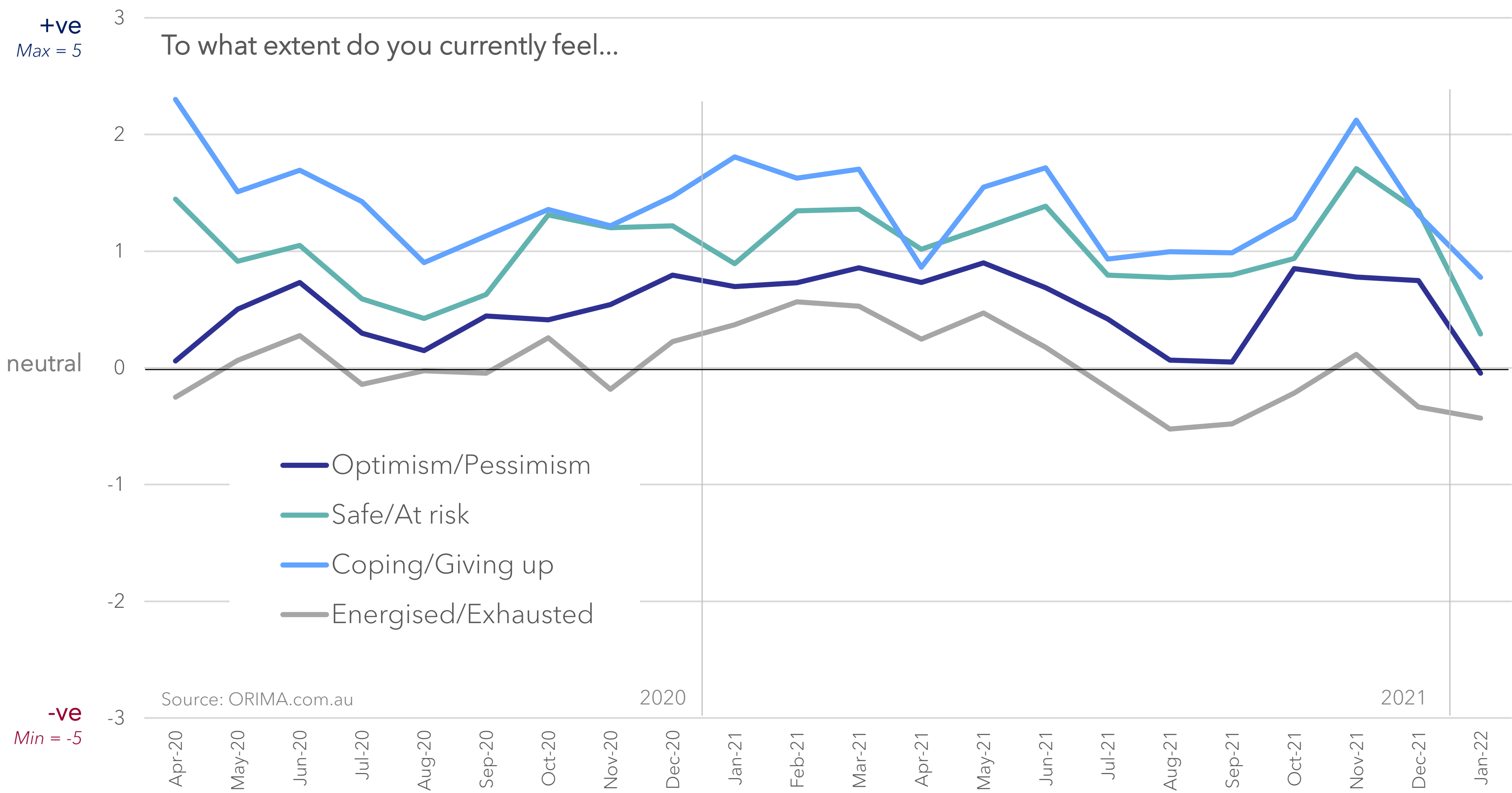
More Australians are currently feeling that their mental health and safety are impacted than at any previous time in the pandemic. In the initial phases of the pandemic many people experienced COVID-19 as an economic and social impact – however by early 2022 the pandemic is having a wider personal health and safety impact. Since the impact of Delta in mid-2021 there has been a dramatic increase in the proportion who feel a personal mental health impact – and that has spiked to its highest level in January 2022. The proportion who feel unsafe has also reached its highest ever level.

Proportion who have experienced a negative personal experience related to:



The impact of COVID-19 on the mood of the community is also the most negative it has been. In January 2022, Australians reported their most negative balance of the pandemic in terms of feeling safe/unsafe, energised/exhausted – and perhaps most significantly, on the coping/giving up balance. For much of the pandemic, the sense of 'coping' has stayed fairly resilient, but that has also fallen very sharply in January. Not surprisingly given these other results, the sense of optimism has also fallen back to its equal lowest levels.

Balance of mood of the community

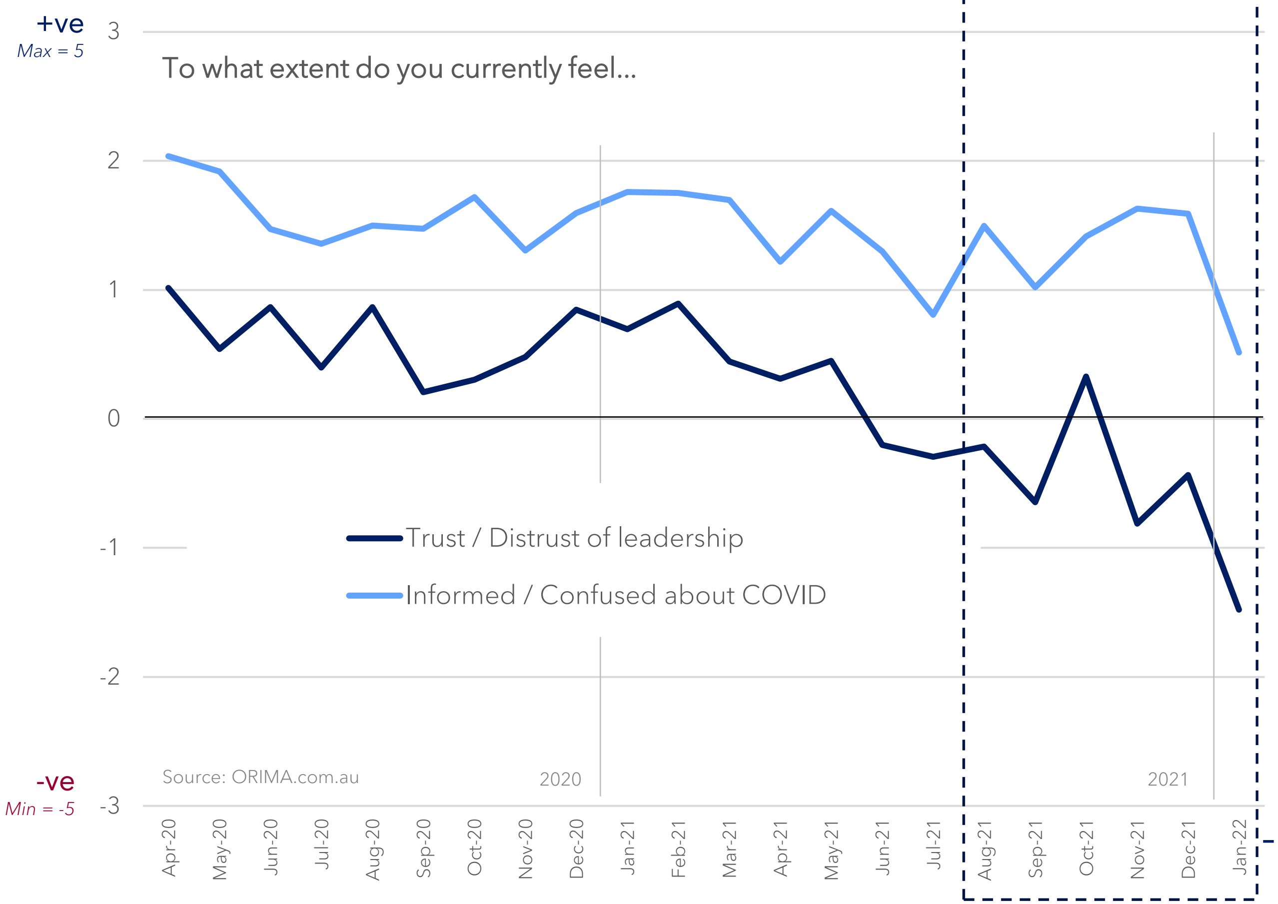


Perceptions of how the pandemic is being managed

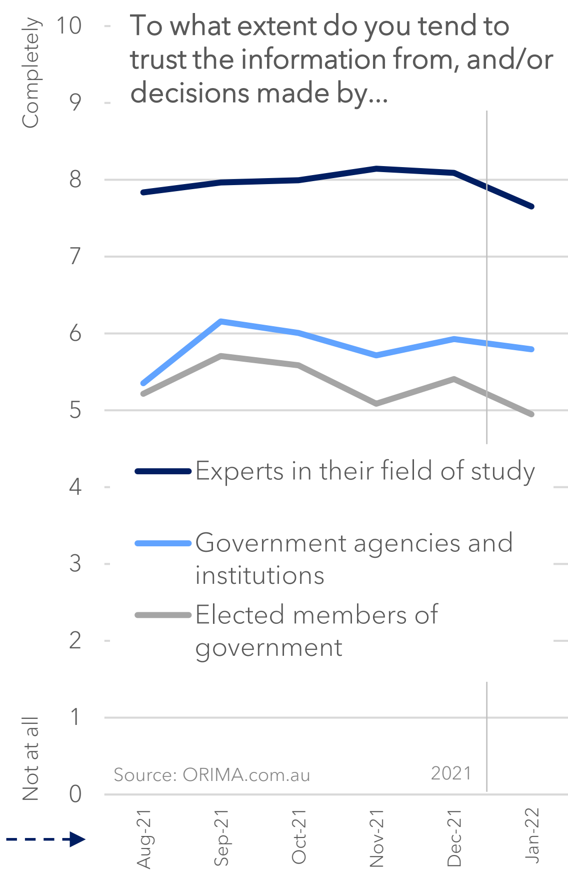
Perceptions of leadership

The feeling of trust in leadership amongst the community has fallen to low levels in early 2022 – but trust in information from government agencies has held up better than trust in information from elected representatives. The overall sense of feeling trusting of leadership has fallen to its lowest level. Looking more closely at where Australians trust information from, this has fallen further for elected members than it has for government agencies, or from experts.

Trust in leadership / Informed about COVID



Trust in information by source



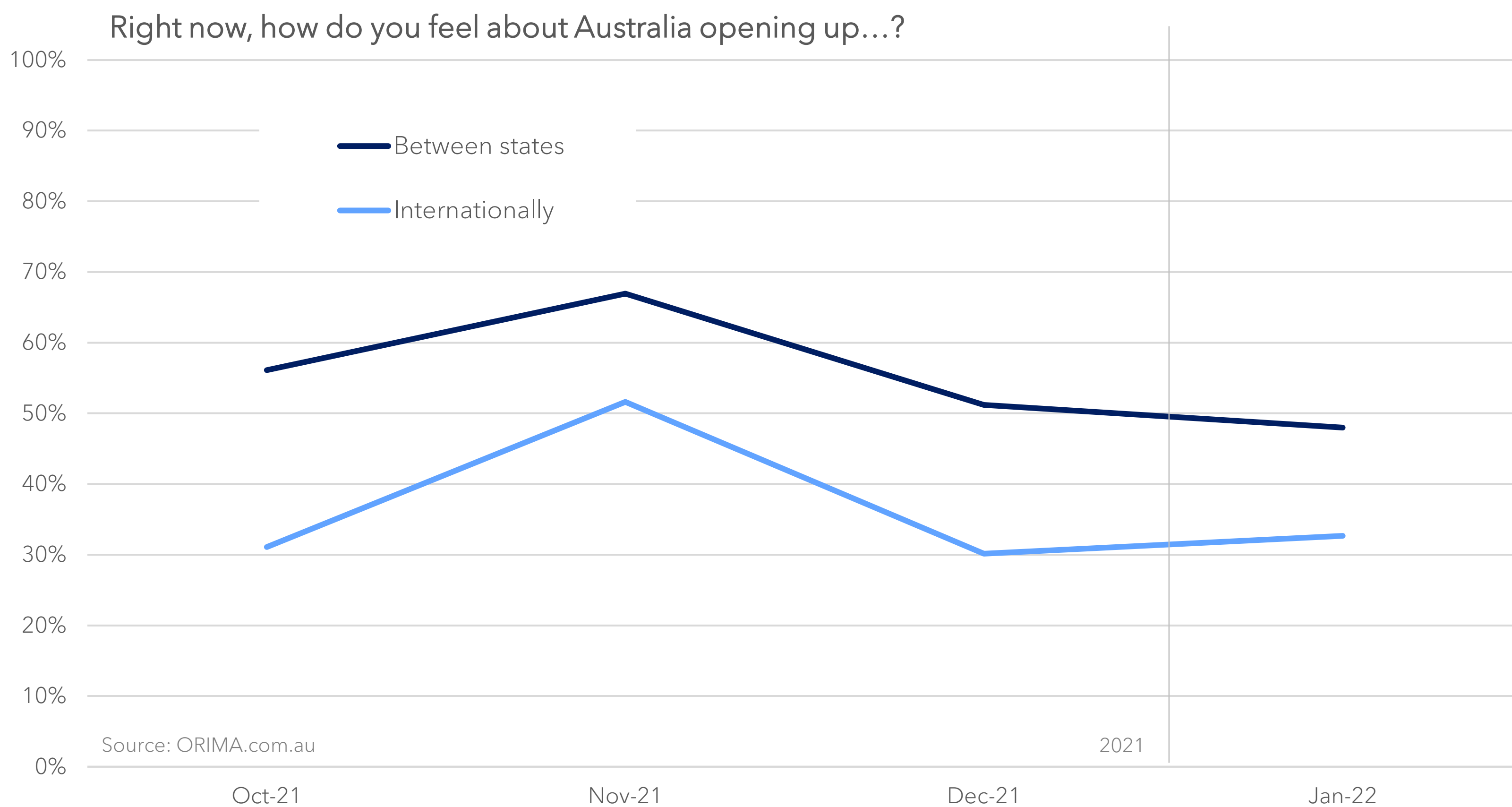
Note: This question was first added to the CRT in August 2021.

How Australians are feeling about living with Omicron

Comfort with opening up movement across Australia

Australians' willingness for travel to open up again between states and internationally has been affected, but not fallen away dramatically with the recent experiences of Omicron. Comfort with opening up travel between states has fallen back from a high in November, but is holding up reasonably well. Comfort with opening up internationally remains lower, but similarly has not fallen away over the New Year.

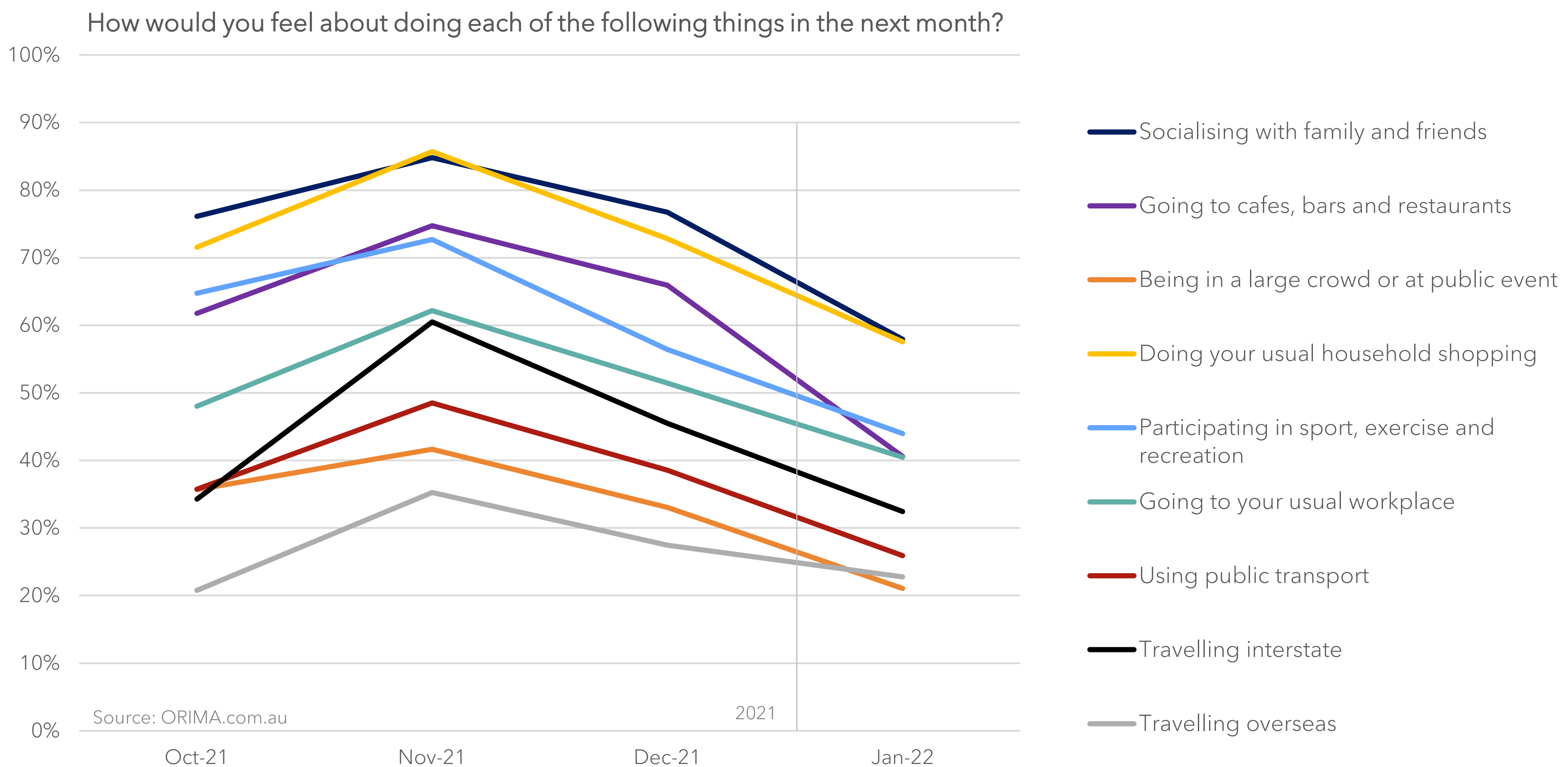
Proportion of people who feel '<u>somewhat positive' and 'very positive</u>' about Australia opening up



Comfort with lifestyle activities

While comfort with movement opening up has held reasonably strong – comfort with lifestyle interactions has fallen back considerably. The *relative* proportion of Australians who are comfortable or excited about doing a range of lifestyle activities has not significantly changed over the last few months – but comfort with *all* of them has fallen away substantially into January (and more so than did comfort with opening up Australia to travel and movement).

Proportion of people who feel '<u>comfortable' and 'excited</u>' to do various activities in the next month



ORIMA
COVID-19 RECOVERY TRACKER

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