ORIMA
COVID-19 RECOVERY TRACKER

Results Update Volume 19

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COVID-19 RECOVERY TRACKER

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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 **1 April 2022**, a total of **33,359** respondents have completed the core questions, with **11,848** 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.

CRT TIMELINE

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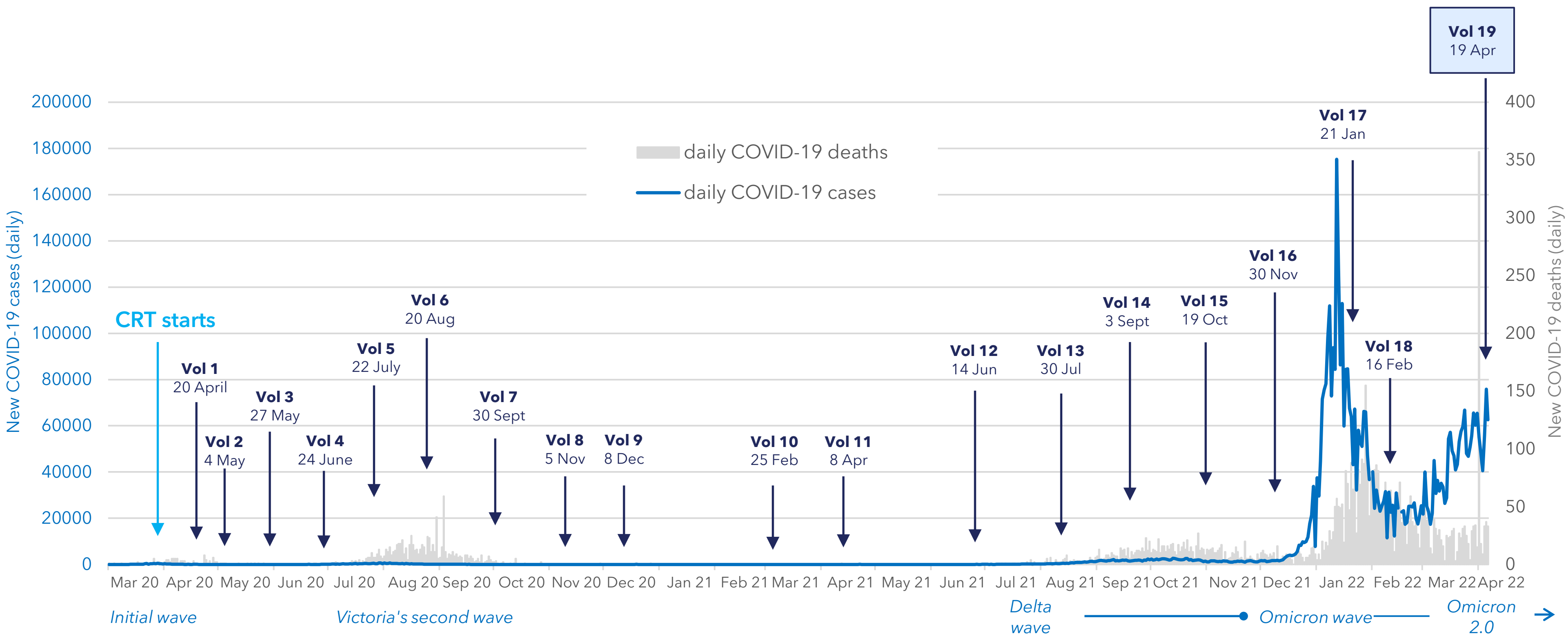
CRT Data sources:

	Core Module in monthly national tracking surveys:	n=21,511
+	Extended online version with fortnightly samples:	n=11,848
	Total	**n=33,359**

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



Source: ourworldindata.org (current as at 6/4/22)

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What the current results tell us

- After a year and a half of COVID-19 being a somewhat arms-length disease for most Australians, a pandemic experienced more in social and financial terms, **the great majority of us have now experienced the disease in our immediate proximity**. More than a quarter now know of someone whose health has been seriously impacted.
- The **national mood and perceptions of impact dipped sharply in January 2022, but then bounced back equally quickly in February and March**. However, the impact of COVID feels more negative now than it did this time last year on both a personal and a national level.
- The **perceived negative impact in March 2022 was nearly identical in all states and territories** – but only Victoria and the ACT reached this point by trending upwards. All other states are either feeling a steady or more negative impact over the past six months.
- **Hopefulness and coping remain stronger than optimism**, while energy remains low – and something that people feel is missing in their lives.
- With the reduction in perceived impact since January, **for the first time since late 2020 there have been two months of increases in trust in leadership**. Satisfaction with state government responses remains higher than with the Australian government response, but both have improved in February and March.
- Australians are much more comfortable doing many activities in their communities and re-engaging. **Comfort with opening up between states and internationally are both much higher in March**.
- While there are substantial minorities who are disappointed with aspects of their lives, **there are only small proportions expecting to change jobs, relationships and where they live in the next 12 months**. The main things people are missing in their lives are energy, excitement, connection and time.

Source: ORIMA.com.au

Setting the context

COVID-19 case numbers exploded in late 2021 and early 2022 with the emergence of first Delta and then Omicron. The absolute number of Omicron cases dwarfs all previous waves, to the point where the initial wave and then the Victorian second wave in the second half of 2020 are no longer even visible in the tracking charts. However, with the near ubiquity of vaccinations and the apparently lower morbidity of Omicron, the ratio of deaths to cases has also dramatically fallen.

By the end of the first quarter of 2022, almost all Australians have now had first-hand experience of knowing people who have had the disease, with around 1-in-4 knowing someone who was seriously affected by it from a health perspective.

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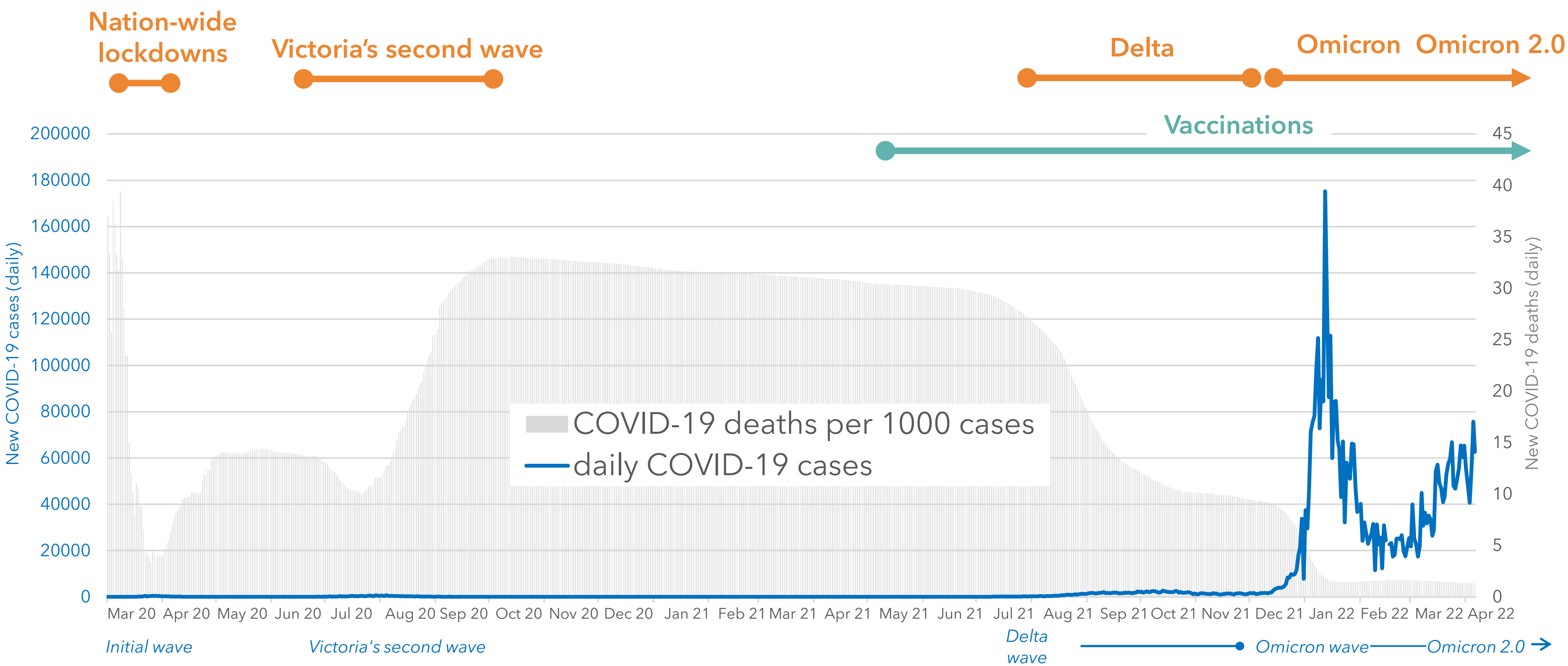
But the rate of deaths per 1,000 known cases plummeted as the Delta and Omicron variants emerged and vaccination rates increased in the community

CRT Timeline mapped against daily COVID cases, and COVID deaths per 1000 cases in Australia



ORIMA.com.au

Source: ourworldindata.org (current as at 6/4/22)

Personal familiarity with COVID

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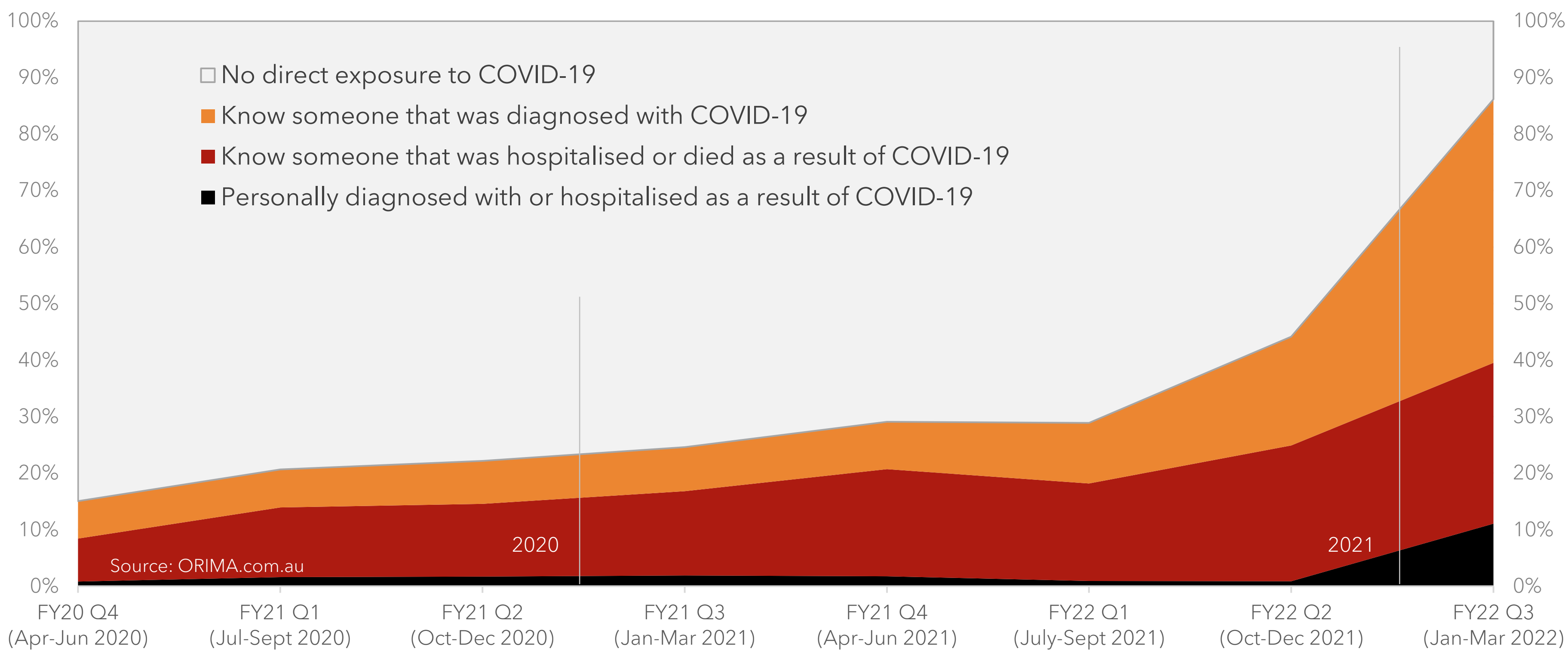
From July 2021 when the Delta wave spread quickly through Australia's most populous states, proximity to COVID dramatically increased. In early 2022 most people have at least seen the disease in someone they know, and more than a quarter know someone who has been seriously affected by it. 11% of respondents in the first quarter of 2022 reported having had COVID themselves. Of those, 91% had had COVID within the last three months.

Highest personal level of exposure to COVID-19



Base: All respondents (n=780-1630/quarter)

Impact & mood

Impact and mood indicators are increasingly moving in step with each other, suggesting that Australians are now having a less nuanced experience of the world as impacted by COVID.

All indicators hit a sharp low point in January 2022 as the Omicron wave swept through the most populous states, and threatened the hoped for emergence into 2022. However, all indicators then bounced back equally quickly in February and March, as the impact of Omicron was less catastrophic than the case numbers may have caused people to anticipate.

Energy remains low, but hopefulness is growing, and people remain mostly coping with their experiences. Trust in leadership has increased from a low in January for two consecutive months, the first time this has happened since the second half of 2020.

Perceived Impact of COVID

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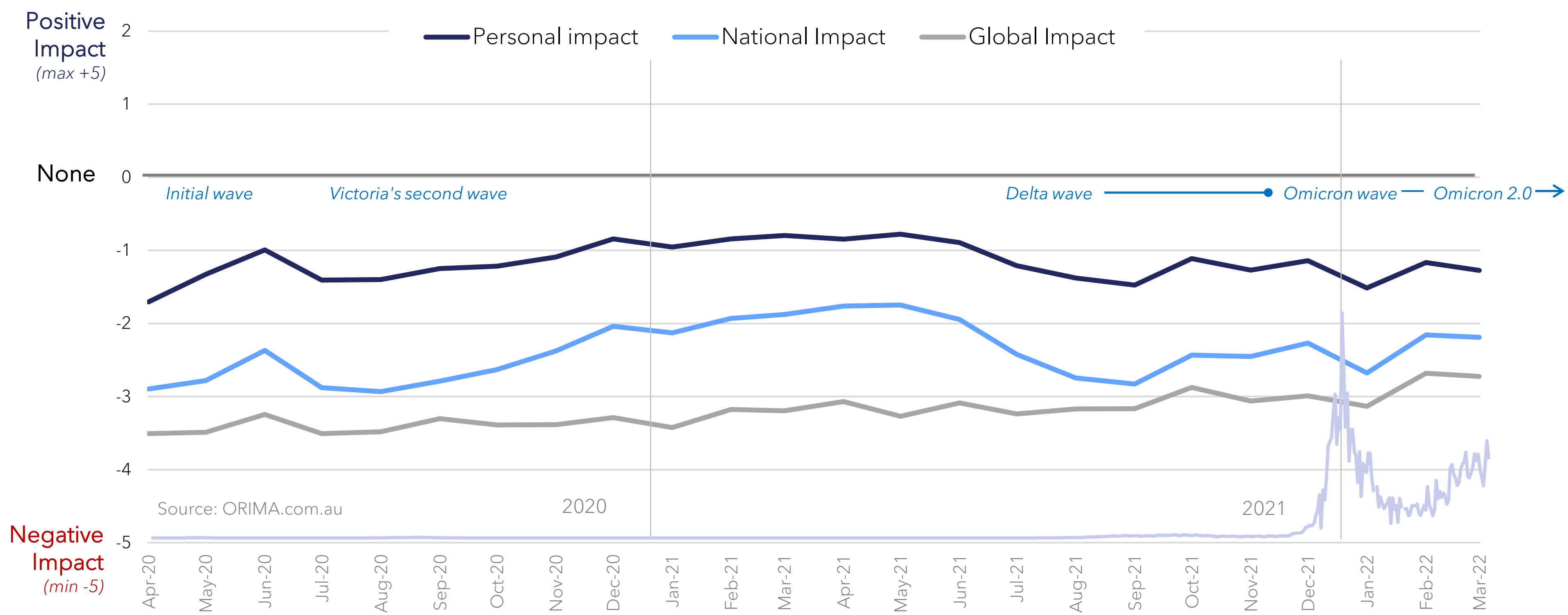
Perceptions of both personal and national impact were sharply more negative in January 2022, dropping to levels seen back in September 2021 when the impacts of the Delta wave were being most acutely felt. February and March saw a return to levels similar to the end of 2021. Since Delta, perceptions of how Australia is doing relative to the rest of the world have narrowed. Perceptions of personal and national impact are currently more negative than this time last year – but perceptions of the global impact are less negative than 12 months ago.

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

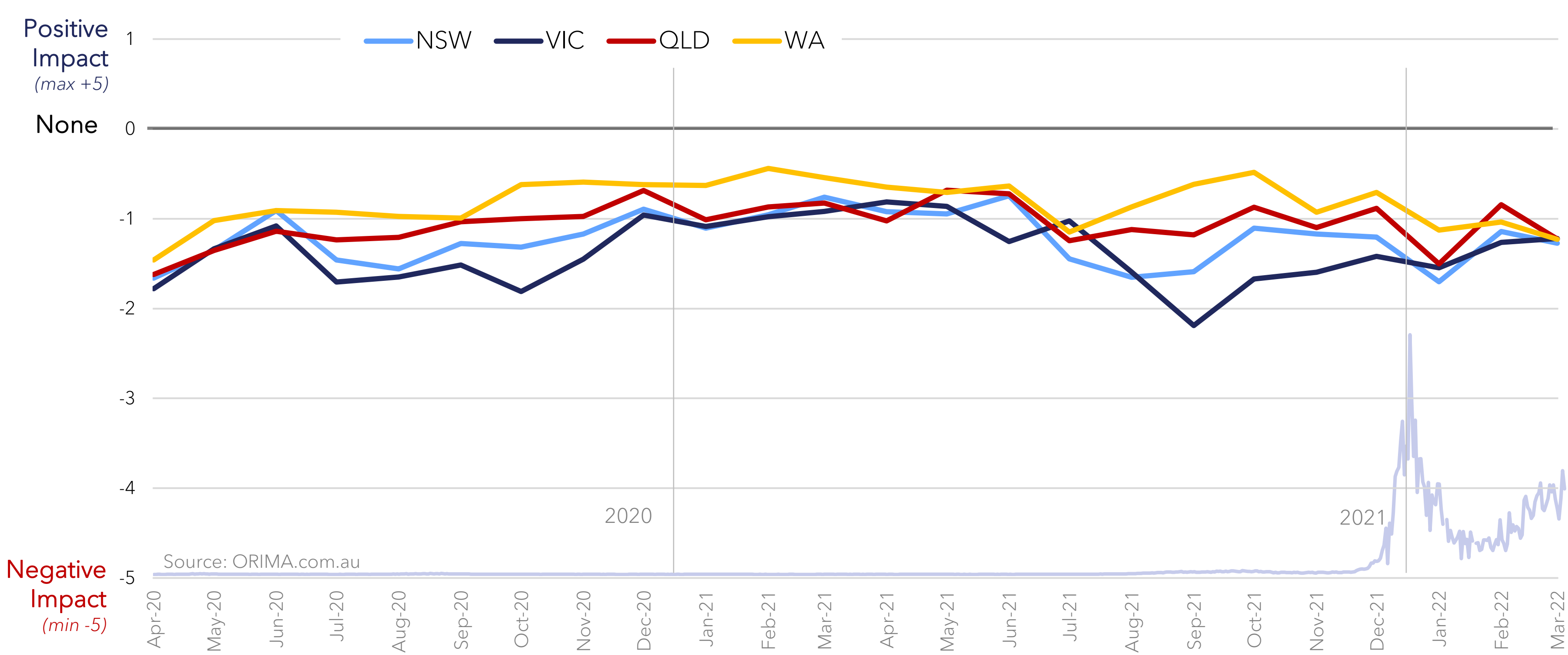


Base: All respondents (n=803-2404/month)

Perceived Impact of COVID by state

The trajectories of Australia's most populous states have been very different over the past two years – but as of March 2022, the perceived negative impact in Vic, NSW, Qld and WA was virtually identical. Perceived personal impact in the smaller states and territories was very slightly more negative – but overall the range between the most and least affected state is currently the smallest that has been seen since the CRT commenced. Both Vic and ACT are on mostly upward trajectories from very low points in September 2021, while all other states and territories are either fairly flat or moving downwards over the last few months.

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



Base: All respondents (n=97-685/month per state)

The **mood** of the country

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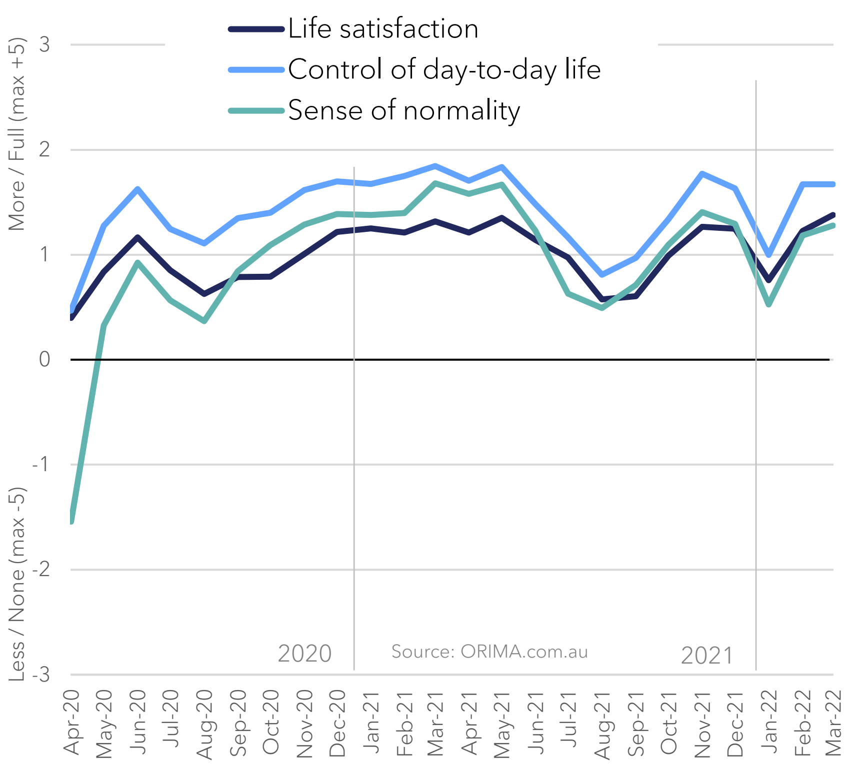
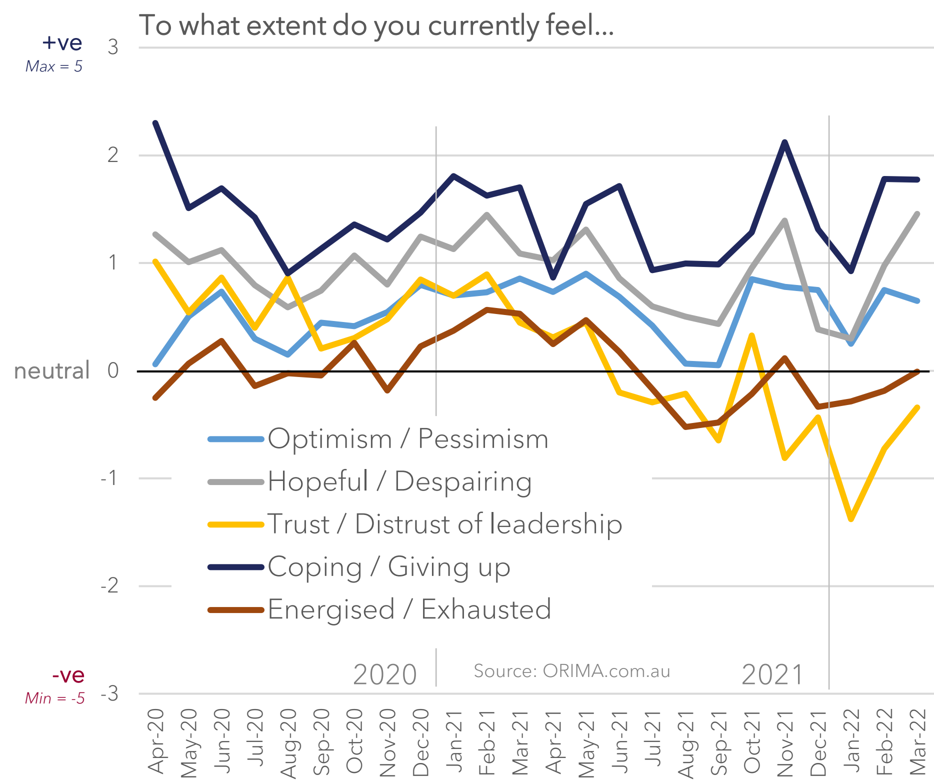
As with the sense of impact, the mood and energy of the community dipped sharply in January 2022 in response to the Omicron wave, but quickly bounced back in February and held that stronger position in March. The key coping/giving up indicator remains amongst the strongest mood measures. Interestingly, in both March 2022 and November 2021 we saw an uptick in being 'hopeful', when 'optimism' didn't see the same jump. At the lower end of the mood indicators, the energised/exhausted indicator got back to the midpoint for only the second time since mid-2021. Trust in leadership reached a low point in January 2022, but has since moved upwards for two months in a row for the first time since December 2020.

The mood and energy in the community



Base: All respondents (n=162-2402/month)



Base: All respondents (n=101-2402/month)

Re-engagement

As perceptions of negative impact has waned and mood improved in February and March 2022, so too have Australians' feelings about opening up improved.

In March a strong majority of Australians felt positive towards opening up both interstate and international travel, and comfort levels with all individual activities were similarly strongly higher. Satisfaction with the response of governments at both federal and state level have also increased from a low point in January.

Satisfaction with **government response**

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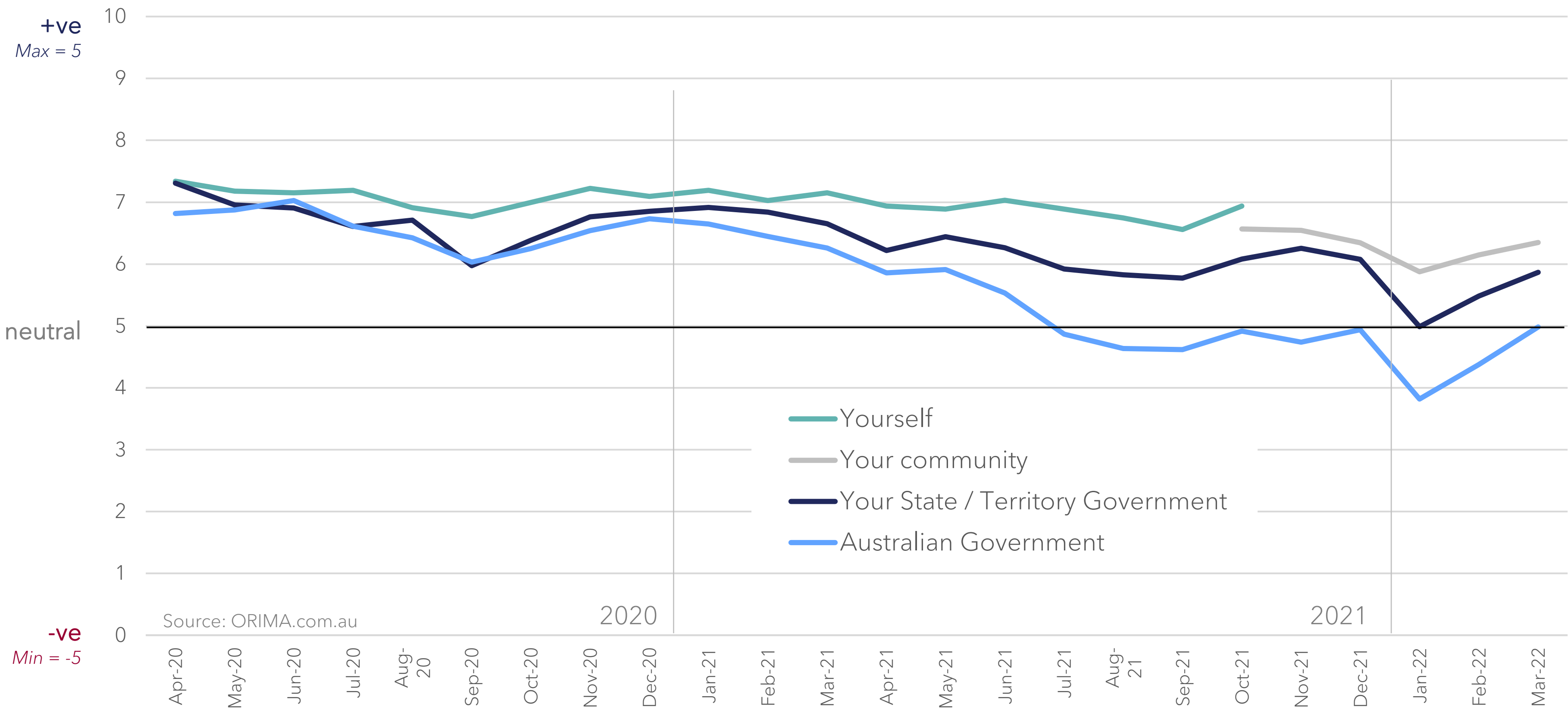
Through 2020 satisfaction with the response of the Australian Government and State and Territory Governments was very similar. Across 2021 satisfaction with the response of both levels of government declined, but more so for the Australian Government. Satisfaction with both fell to their lowest levels in January 2022, before two months of improving feelings as the level of negative impact people feel has lessened. Throughout, satisfaction with the response of themselves and their community has been both higher, and more stable.

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

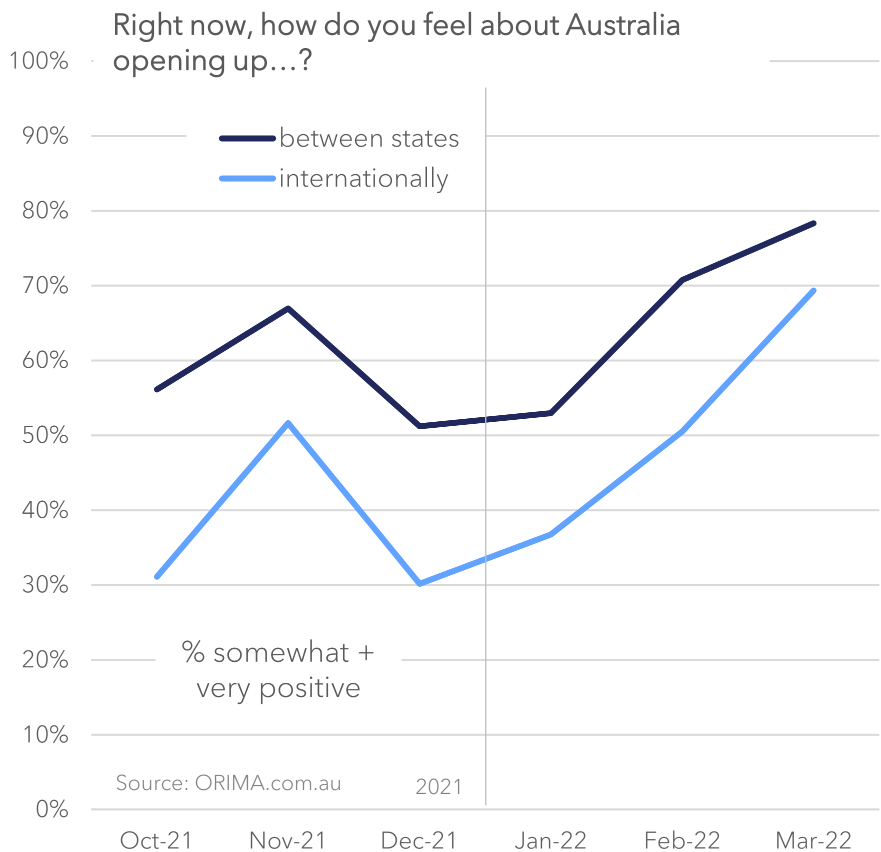


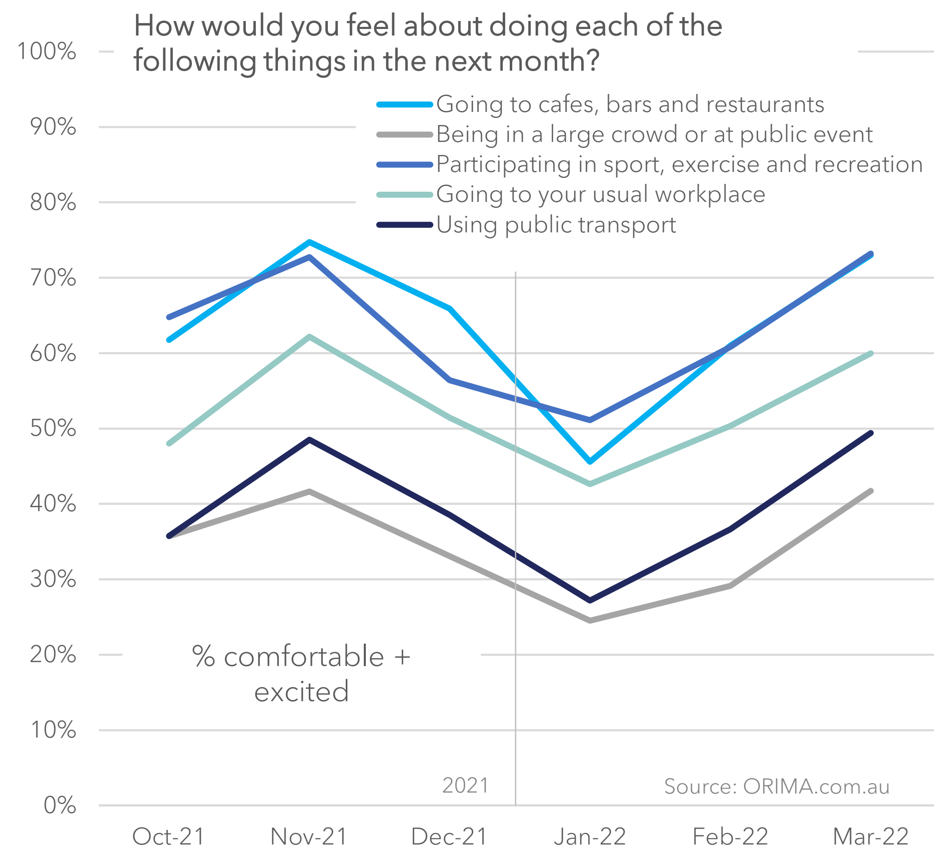
Base: All respondents (n=84-770/month)

Comfort with **Australia "opening up"**

Not only are Australians feeling less negatively impacted by COVID-19 in February and March 2022, this carries through into their comfort with opening up travel and activities. In March just shy of 80% of CRT respondents were positive about opening up interstate travel – and nearly as many were positive about opening up international travel. Their *relative* comfort with various activities hasn't changed substantially, but *absolute* comfort with all activities has also increased dramatically since the low point in January. The lowest levels of comfort remain with being in large crowds or using public transport, but comfort with smaller hospitality venues, workplaces and participating in sport, exercise and recreation is considerable higher, and growing.

How Australians feel about re-engaging and opening up





Base: All respondents (n=82-636/month)

Anxiety related to **Australia "opening up"**

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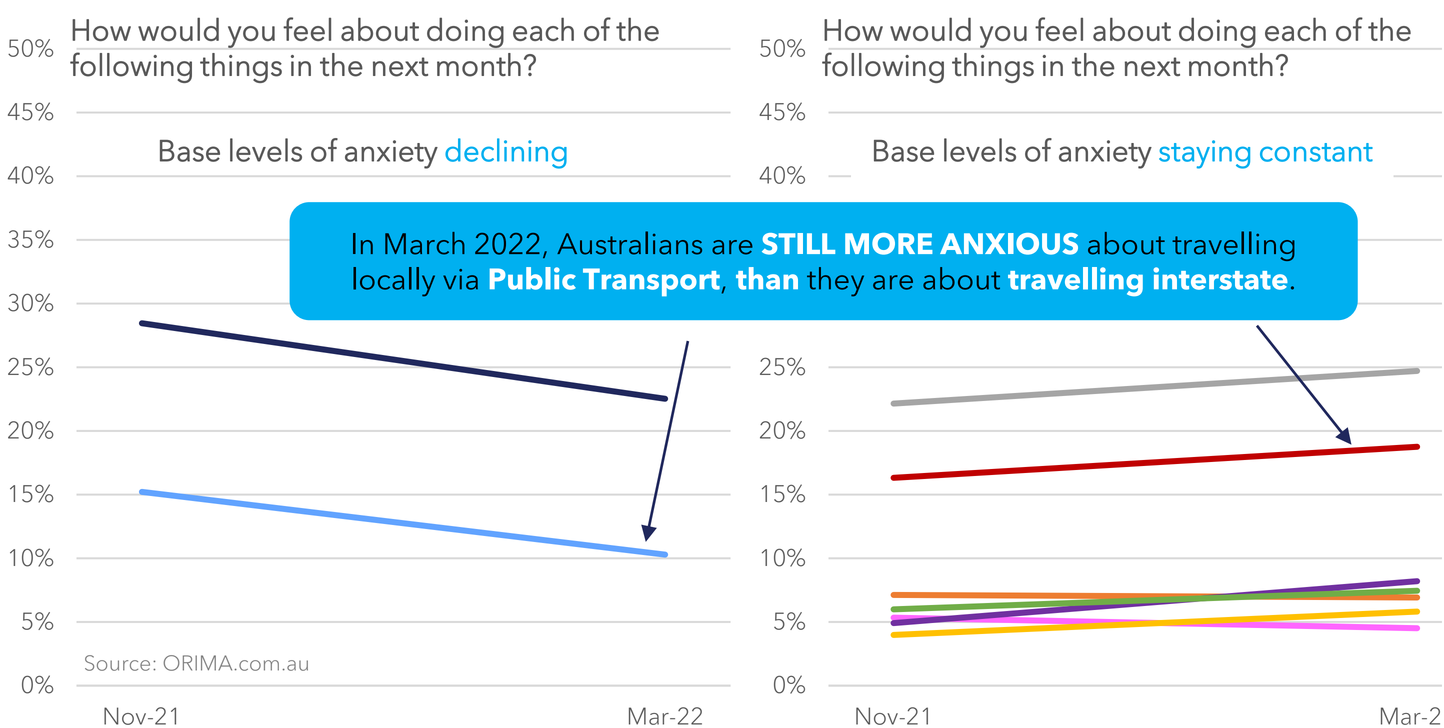
While the community as a whole is increasingly feeling more comfortable to re-engage with many aspects of life, there is a small group who continue to feel anxious about opening up and may seek to avoid engaging with others. Base levels of anxiety around travel have declined since November. However, the proportion of people who feel anxious about doing regular day-to-day activities remains the same as it was in November last year, and shows no immediate signs of abating.

How Australians feel about re-engaging and opening up

How would you feel about doing each of the following things in the next month?



Source: ORIMA.com.au

Note: Data points for December, January, and February omitted for clarity

Base: All respondents (n=318-525/month)

Drive for change in 2022

While there has been a lot of discussion of the drive towards very high levels of 'life churn' in 2022 – such as changing jobs, changing relationships or moving where they live – there is only a moderate level of apparent dissatisfaction which might drive such change in Australia.

There *are* minorities of Australians who feel disappointed with certain aspects of their life, and who expect to make important changes in their life in 2022. However, the majority of respondents to the CRT in January-March 2022 were satisfied with these aspects of their lives, and were *not* anticipating making changes. The main things that people feel is missing are energy, excitement, connection and time. Those people who are employed do have a slightly higher propensity to be considering making changes to their lives.

Life balance

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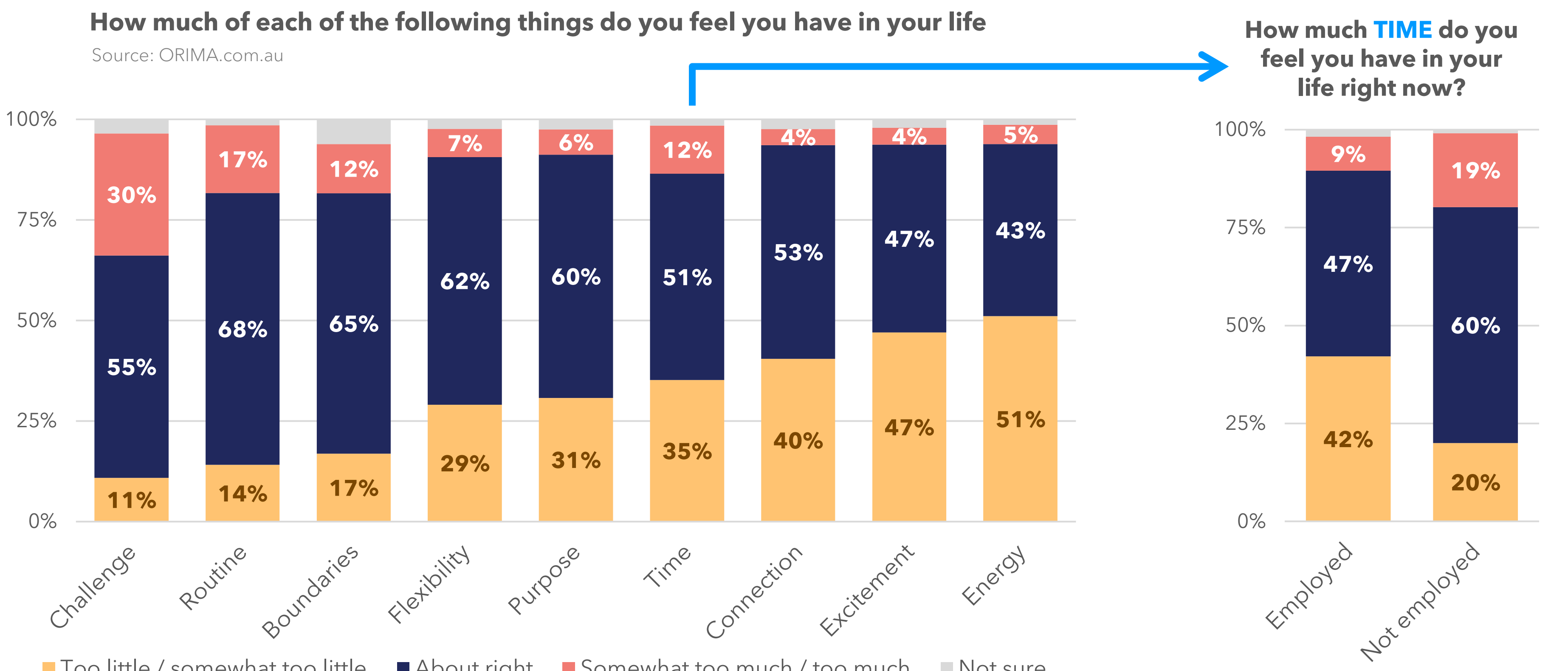
Substantial proportions of the community feel that various aspects of their lives are not currently in balance. Though we don't have pre-COVID comparisons for these indicators, these proportions suggest that most people may be looking for a more desirable balance in some aspects of their lives. The aspects that people most feel are missing are *energy*, *excitement* and *connection*. Time is missing for many – and especially for those people who are employed. 1-in-3 people feel there is too much *challenge* in their lives.

How balanced life feels (January-March 2022)



Base: All respondents (n=1448)

Base: All respondents (n=455 (not employed)-993 (employed))

Intentions to change

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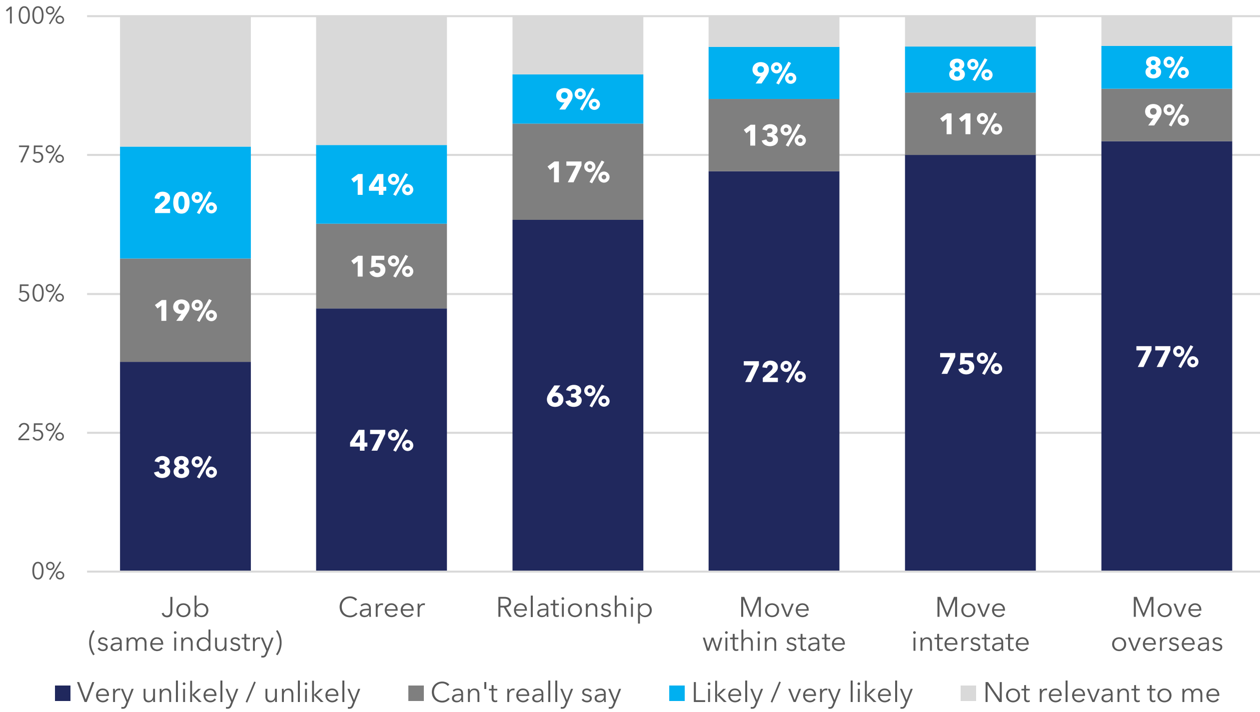
Only a small proportion of the community expect to make major changes to their lives in the next 12 months. 20% think it is likely or very likely they will change jobs (25% among those who are currently employed). ABS statistics show job mobility has been declining and below 10% for the past decade – but comparable *intention to change* statistics are not readily available. 8-9% of respondents expect to change relationships or where they live in the next 12 months. People who are currently employed are slightly more likely than those who are not to expect to change all facets of their lives (noting that two-thirds of those not employed are older people who are likely to be retired).

Intention to make major life changes (January-March 2022)

In the next 12 months, how likely are you to change...

Source: ORIMA.com.au



Base: All respondents (n=1462)

Those who are employed are slightly more likely to think they may make changes to their lives in 2022.

Change job: 25%

Change career: 16%

Change relationship: 11%

Move within state: 10%

Move interstate: 9%

Move overseas: 9%

Base: All respondents (n=1004)

Satisfaction with **aspects of life**

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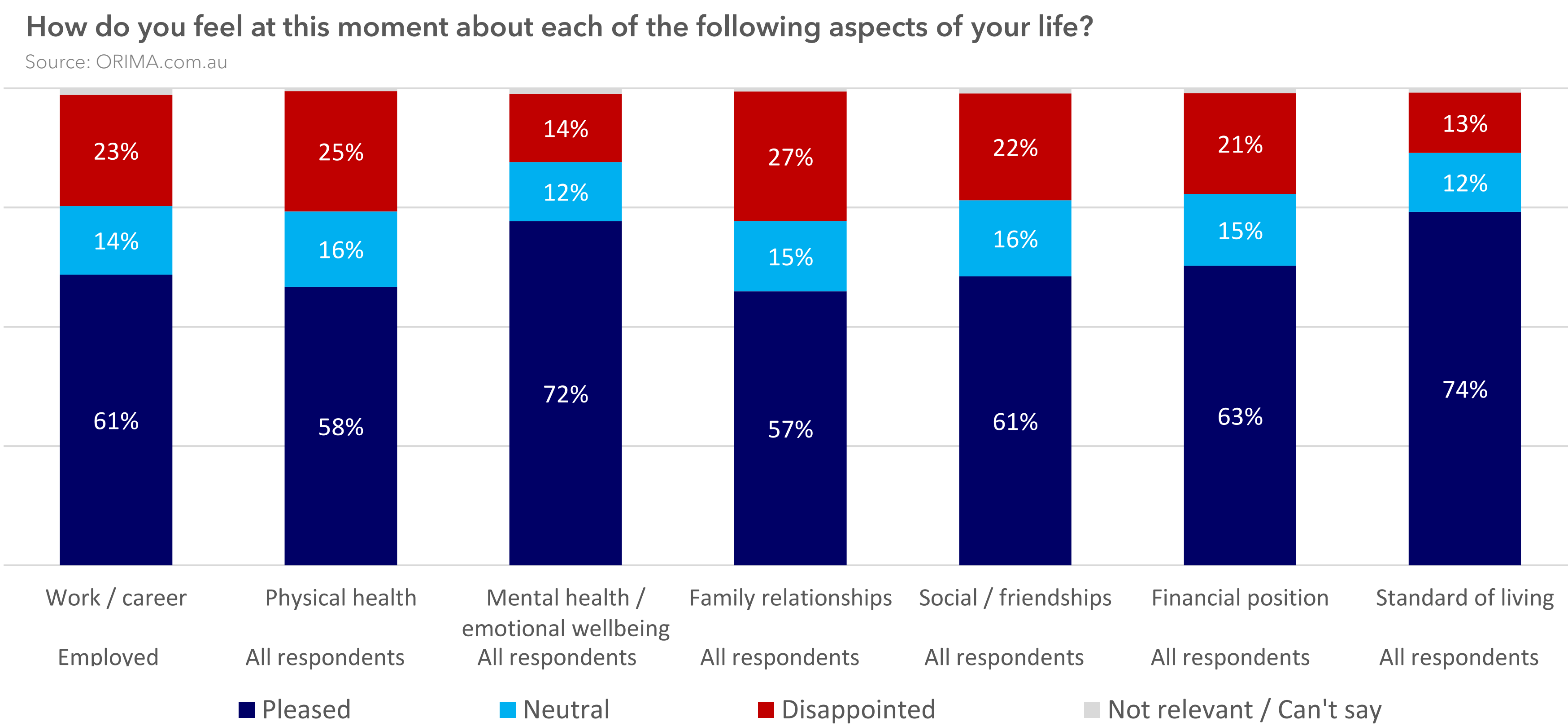
Overall, a majority of people are pleased with various aspects of their lives – but there are significant minorities of the community who are disappointed with each aspect. With 20%-27% of the community disappointed with their work or career, their physical health, their family relationships, social opportunities and friendships, and overall financial position – it might be expected that there is some level of underlying latent motivation for change across the community. Other than with respect to job/career – people who are employed do not vary significantly from the overall community average on satisfaction with any of these aspects of life.

Satisfaction with aspects of life (January-March 2022)



Base: All respondents (n=1004 (employed)-1462 (all respondents))

Thank you

We would also like to acknowledge and thank all the participants who were involved in the research for their valuable contribution and input.

This project was conducted in accordance with the international quality standard ISO 20252 and the Australian Privacy Principles contained in the Privacy Act 1988.

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- Communication, marketing and community research
- Organisational, stakeholder and client research
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- Consultation and submissions
- Portals
- Data analytics and compliance
- Online surveys and ballots
- First Nations research
- Disability services research

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