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COVID-19 RECOVERY TRACKER

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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 **30 September 2022**, a total of **39,133** respondents have completed the core questions, with **14,322** 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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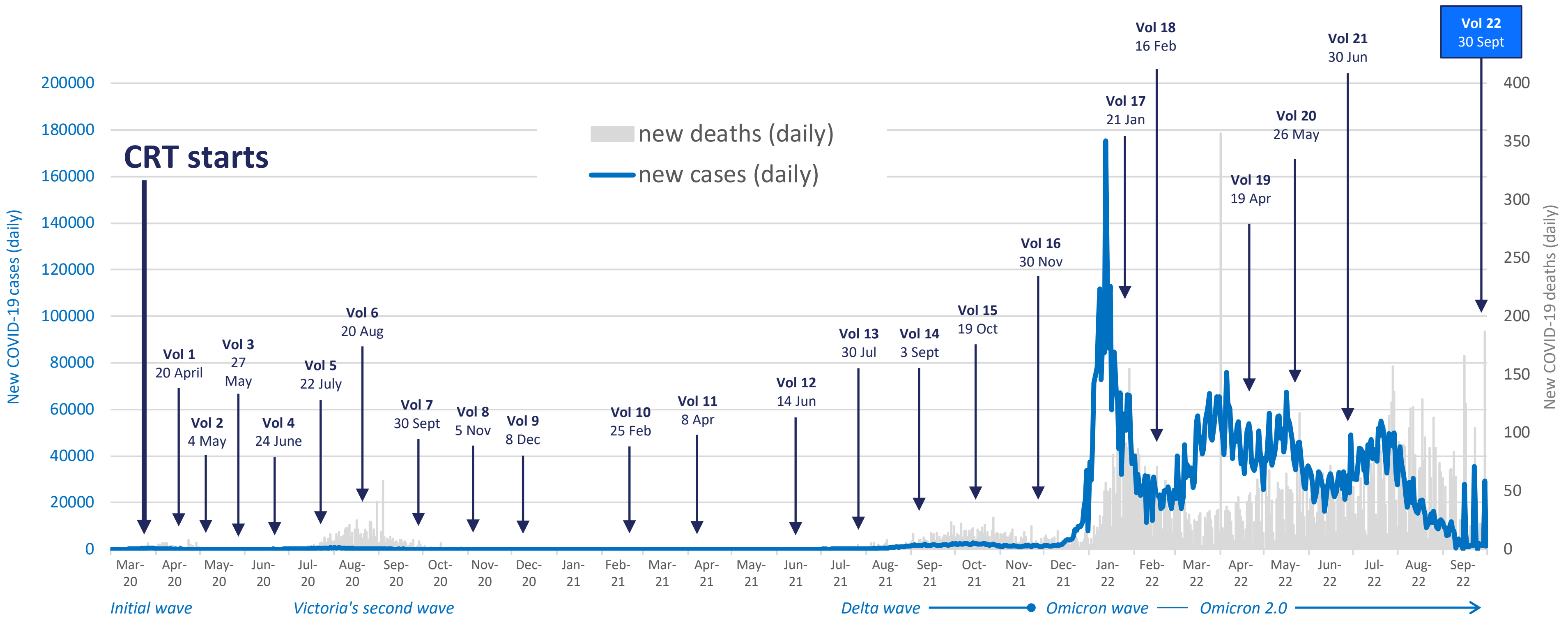
CRT Data sources:

	Core Module in monthly national tracking surveys:	n=24,305
+	Extended online version with fortnightly samples:	n=14,322
	Total	**n=39,133**

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



Source: ourworldindata.org (current as at 30/09/22)

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What the current results tell us

- In the July-to-September quarter of 2022, for the first time in more than two years COVID-19 was no longer the dominant narrative in the Australian or national news. While the start of the quarter saw relatively high case numbers, since then case numbers (if not deaths) waned considerably. By the end of September the National Cabinet had announced the end of mandatory isolation periods for those who test positive, and virtually all restrictions in Australia had been removed.
- In this environment, the sense of both personal and national impact moved to their least negative levels since the first half of 2021. However, while broad concern about the health risk of COVID and about doing daily activities fell across the quarter, not everyone is equally comfortable with opening up, and not all mood indicators showed upwards movements – perhaps reflecting other uncertainties replacing COVID.
- Hopefulness increased sharply, but feelings of coping, optimism, energy and life satisfaction were all, if anything, slightly down on the quarter. Concern about future financial security jumped sharply in the April-to-June quarter, and stayed at elevated levels in July-to-September.
- Reflections on the COVID period show 59% of CRT respondents from April to September felt that COVID affected a period of their lives which was either a major transition or a period where they wanted to achieve important things (and this was up to 81% of those aged 18-29). This is significant because other CRT-related research suggested these are mechanisms by which COVID may have a long or even permanent effect on people.
- Overall, 45% of people felt they had lost ground during COVID, while only 11% felt they had got ahead. However, only 58% of people wanted their lives to mostly or completely go back to how they had been before COVID (and this was lowest amongst younger people, who were most likely to feel their lives had been disrupted).
- Segmentation analysis shows there is a spectrum of views in the community of how life feels to people at present. This includes a segment for whom life feels both relatively and absolutely bad. This segment feels least satisfied with responses to COVID, and is most anxious about opening up and daily life activities.

Source: ORIMA.com.au

Current impact and mood

Perceived Impact of COVID

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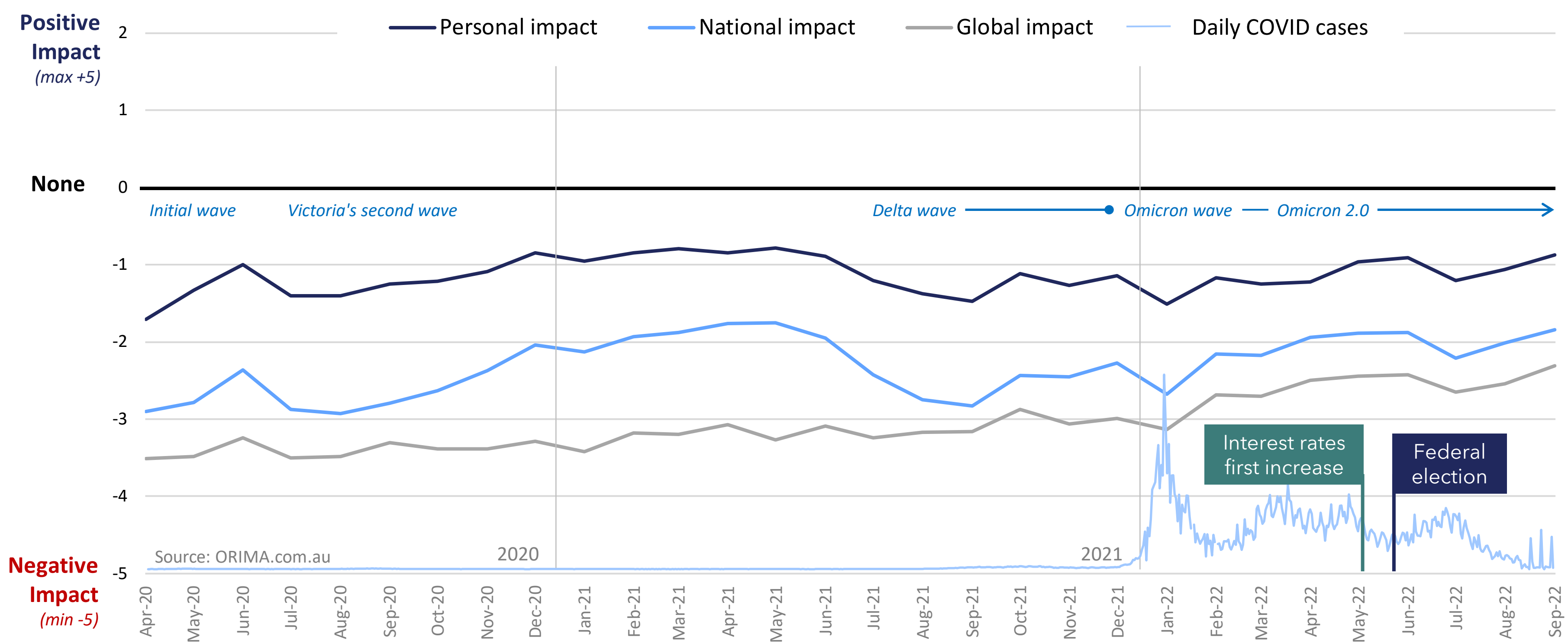
CRT respondents' perceptions of the impact of COVID has tracked a fluctuating path – and this is as true across 2022 as it has been across the entire two-and-a-half-year period. January 2022 saw respondents feeling as negative as they had at any time throughout the pandemic, while September finds the impact at around the *least* negative levels seen. The general pattern seen over that 9-month period is reminiscent of the second half of 2020, which saw a similar movement. However, the national narrative in late 2022 is very different now compared to that first "COVID-Christmas". By the end of September the elimination of mandatory isolation requirements for people who test positive for COVID had been announced, interest rates and global tensions drive the news cycle, and the likelihood of a return to COVID-dominated lifestyles feels far away.

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



Base: All respondents (n=795-2404/month)

Perceived Impact of COVID – by state

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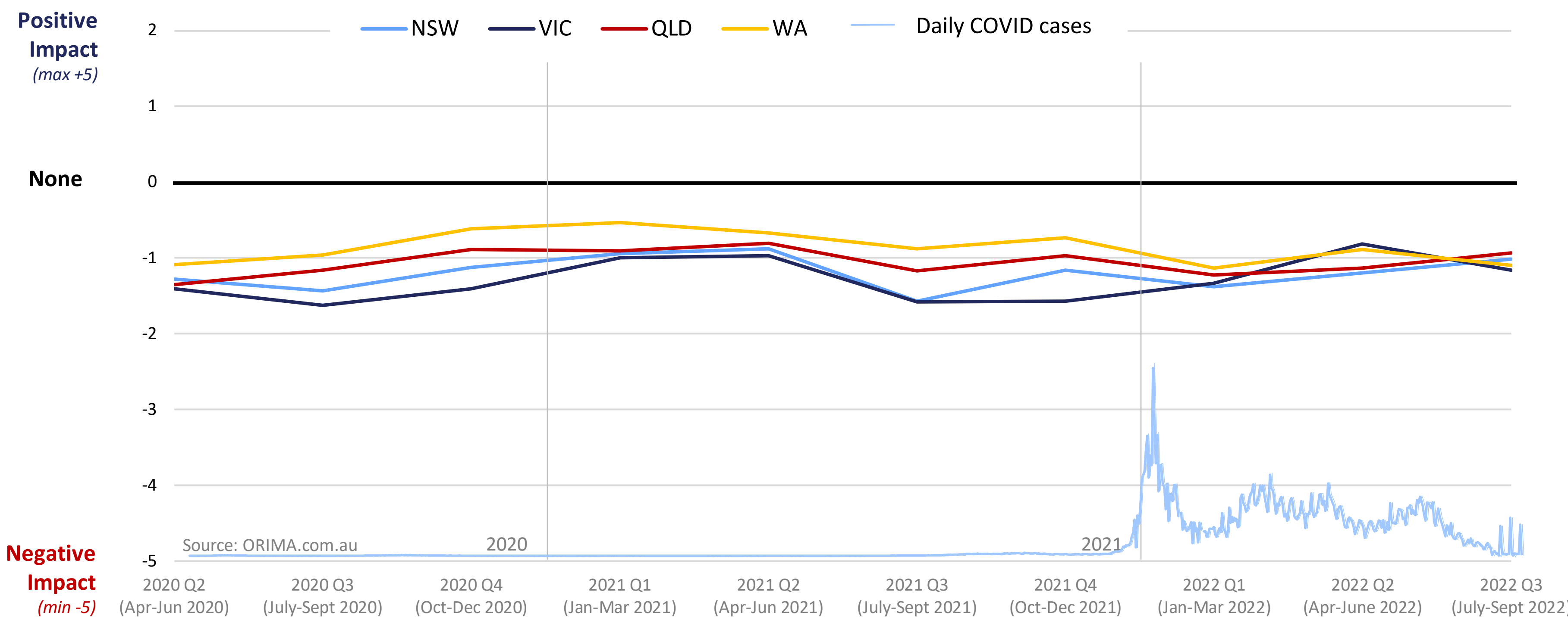
Through 2020 and 2021 one of the major shocks for many Australians was the realisation of the significance of state borders. Before COVID, state differences were mostly experienced through generally good-natured parochialism and some frustrating administrative redundancies. However, COVID cast state borders in an entirely different light, with the power and variability of State Governments suddenly to the forefront. This has been reflected in quite different experiences for CRT respondents in different places at different times. Looking back at the macro patterns across the pandemic phase though, it is apparent that while there *were* material differences for people in different states, the shape of the experience has been more similar than different. It is also apparent that in 2022 the experience of people across Australia has been the most similar since COVID hit.

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

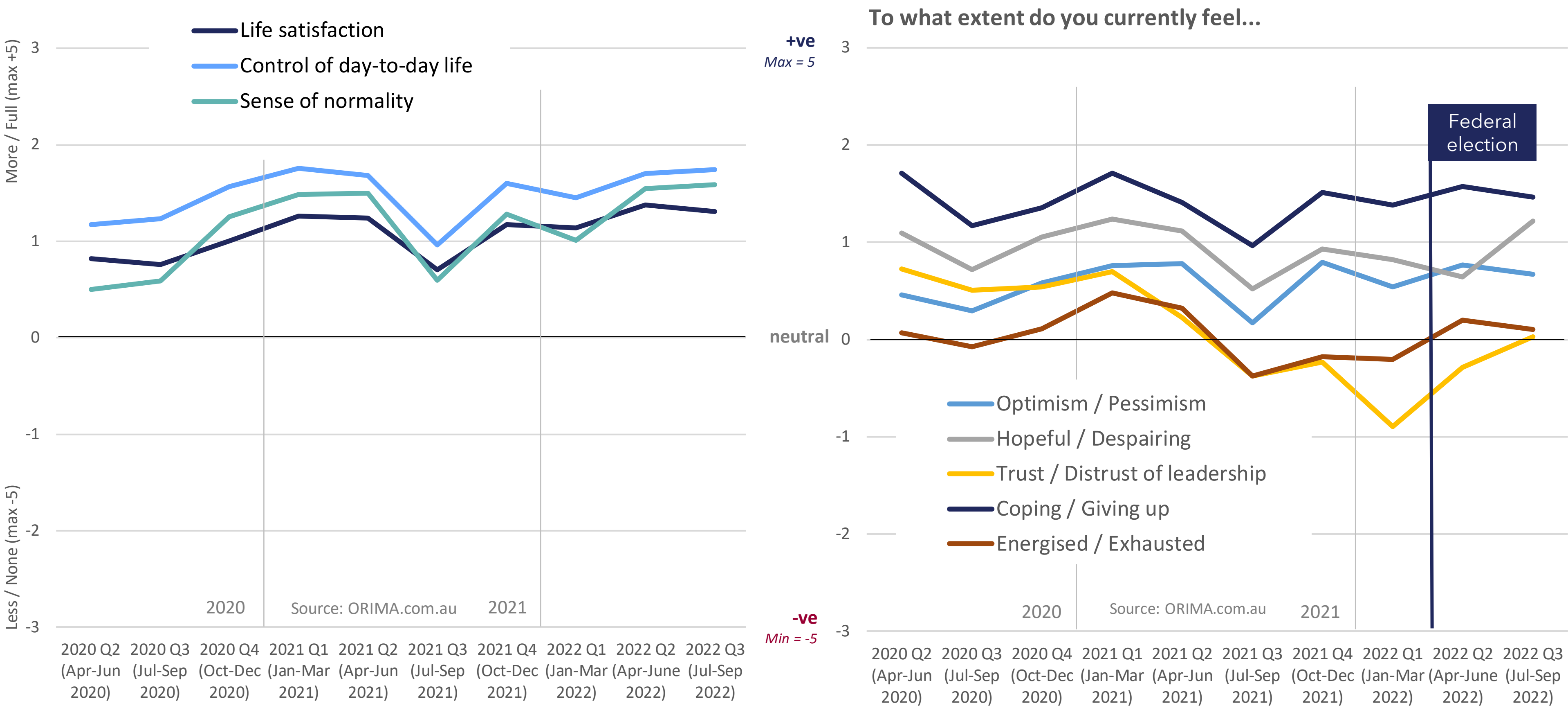


Base: All respondents (n=326-1433/quarter)

Mood

The July-to-September period appears to have been a somewhat uncertain time for many CRT respondents. The sense of control and normality continued to rise slightly, while hopefulness and trust in leadership both rose. However, optimism, life satisfaction and the sense of coping fell slightly. After a slow increase from a low point in the July-to-September quarter in 2021, the sense of feeling energised also fell back a little in the most recent quarter.

The mood and energy in the community



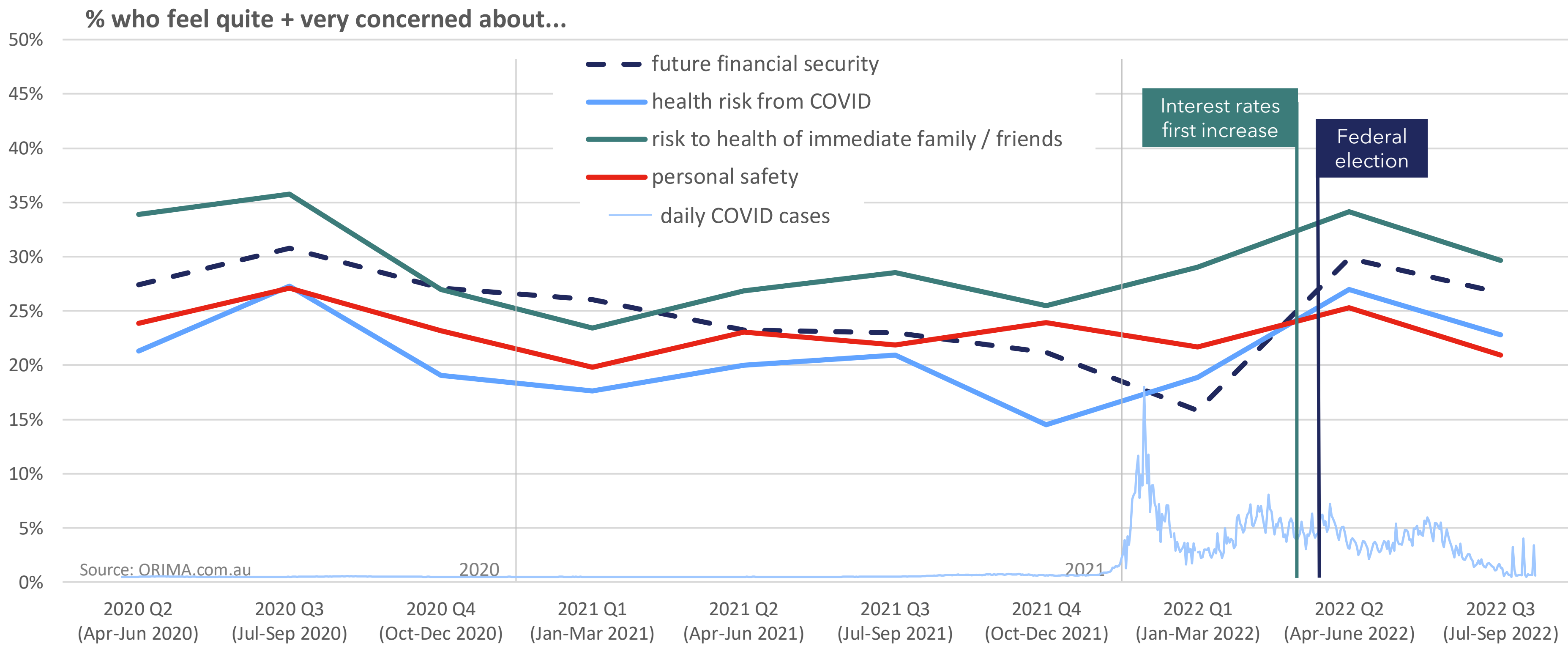
Base: All respondents (n=2851-5357/quarter)

Base: All respondents (n=396-5353/quarter)

Community concerns

In the Q2 2022 CRT summary there was a sense that respondents had started looking beyond COVID as the main disruption on their lives. This was most apparent in the sharp uptick in concern for financial security. As with concern about health risks from COVID, concern about future financial security eased a little in the current quarter – but remains at an elevated level compared to the last 12 months.

Concerns about personal, social and health-related risks of COVID



Base: All respondents (n=550-1618/quarter)

Comfort with Australia "opening up"

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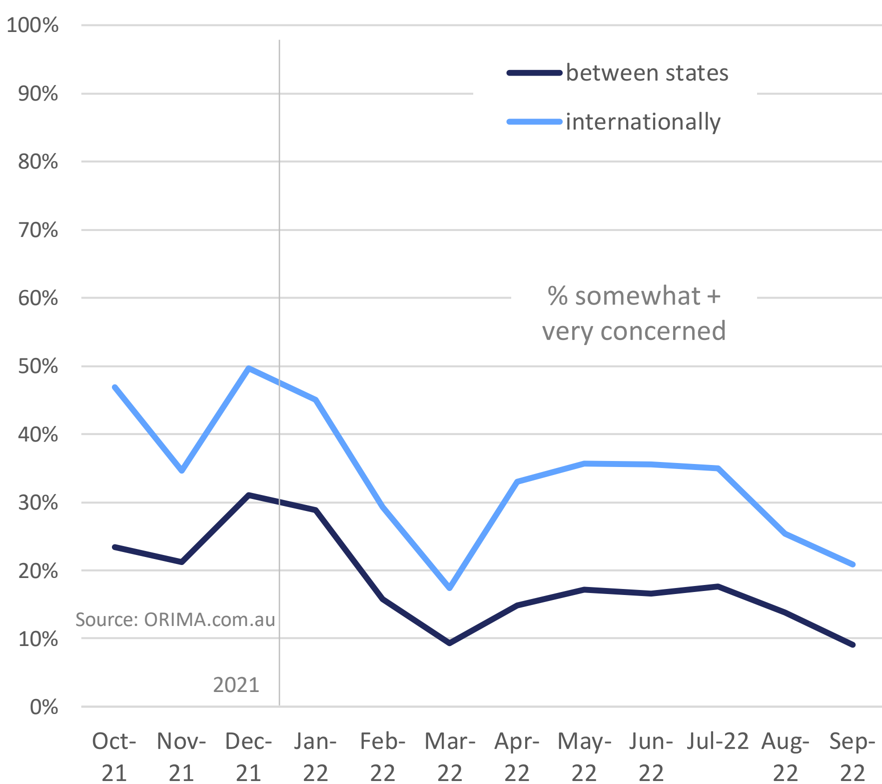
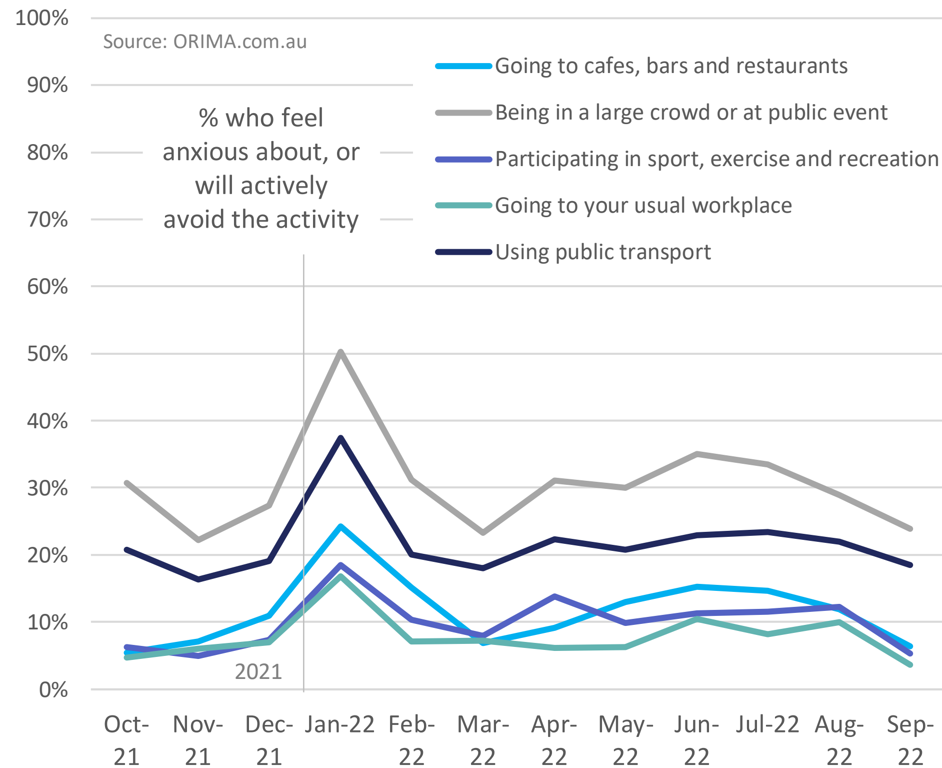
Perhaps one of the clearest indicators that most Australians are moving on from the impact of COVID can be seen in the diminishing levels of concern about 'opening up'. After something of an increase through the middle of 2022, when the sheer number of cases associated with omicron during Winter likely drove some latent concern, this has steadily fallen away through August and September.

How Australians feel about re-engaging and opening up

Right now, how do you feel about Australia opening up…?



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



Base: All respondents (n=83-636/month)

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

Reflecting on COVID

In April we introduced some additional questions to explore how respondents viewed the impact of COVID on their lives. On these and other questions, the April-June 2022 quarter appeared to reflect something of a change in the way CRT respondents were viewing COVID. For the first time since the tracking began in April 2020, there was a strong sense that many people had begun to look beyond COVID.

Responses to the new questions have not varied substantially from month to month or quarter to quarter, and the results shown in this section reflect all responses from the April to September period.

Reflections on the COVID period

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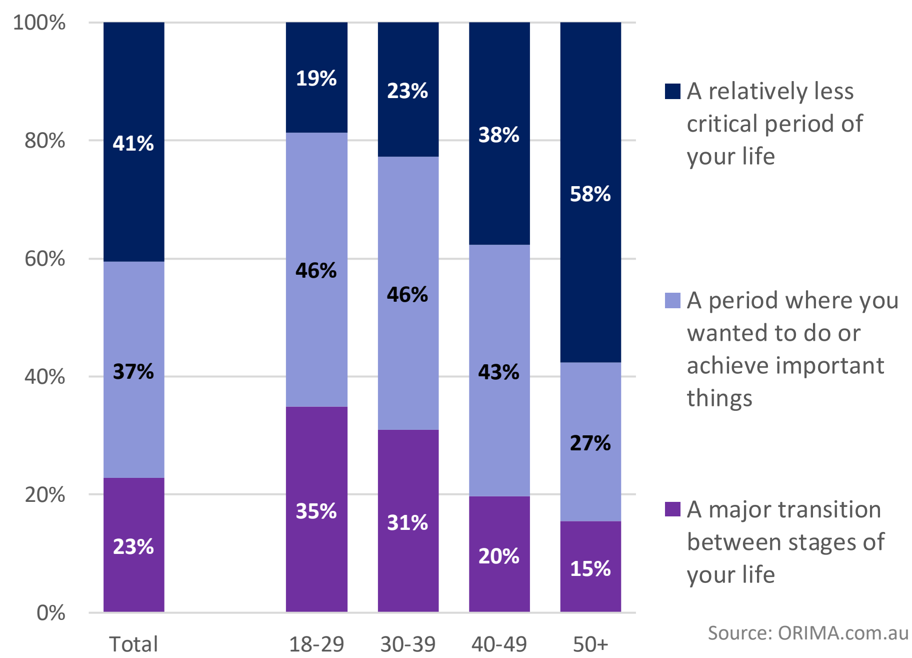
Nearly 3-in-5 respondents to the CRT between April and September 2022 described the period of their lives that was affected by COVID as either *a major transition* or as a period where they *wanted to do or achieve important things*. This was closely related to age, with more than 80% of those aged 18-29 falling into one of these two categories. This is potentially important, as other CRT-related research suggests that people missing important transitions or experiences are mechanisms which may result in long term (or even permanent) negative impacts on people as a result of COVID.

Less than 3-in-5 respondents in that same time period wanted their lives to *mostly or completely* go back to how they were before COVID. Younger people were the least likely to want their lives to return to how they were pre-COVID.

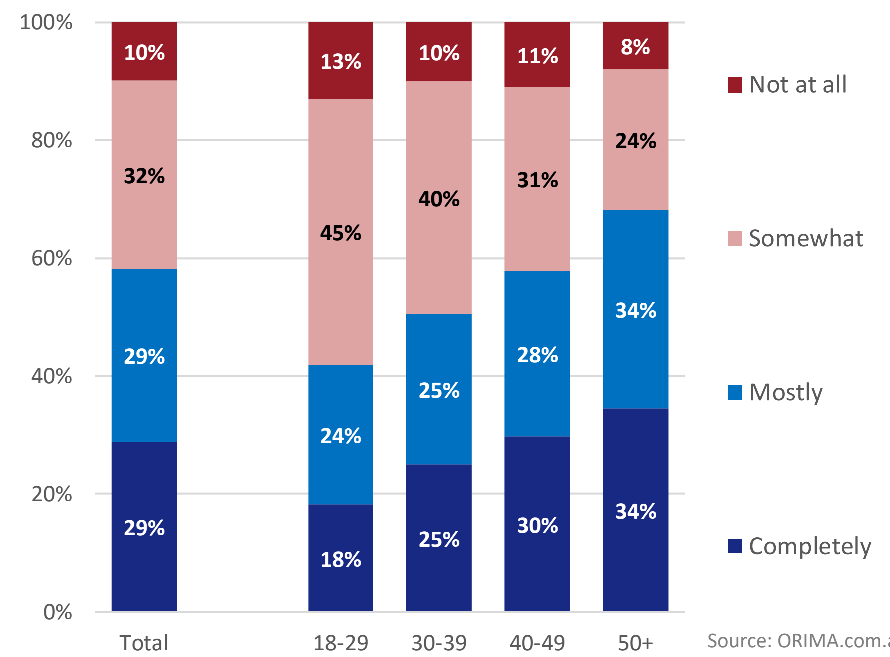
Stages of life affected by COVID and desire to return to normal

Which of these best describe the part of your life that has been affected by COVID?



Source: ORIMA.com.au

How much do you want your life to go back to how it was before COVID?



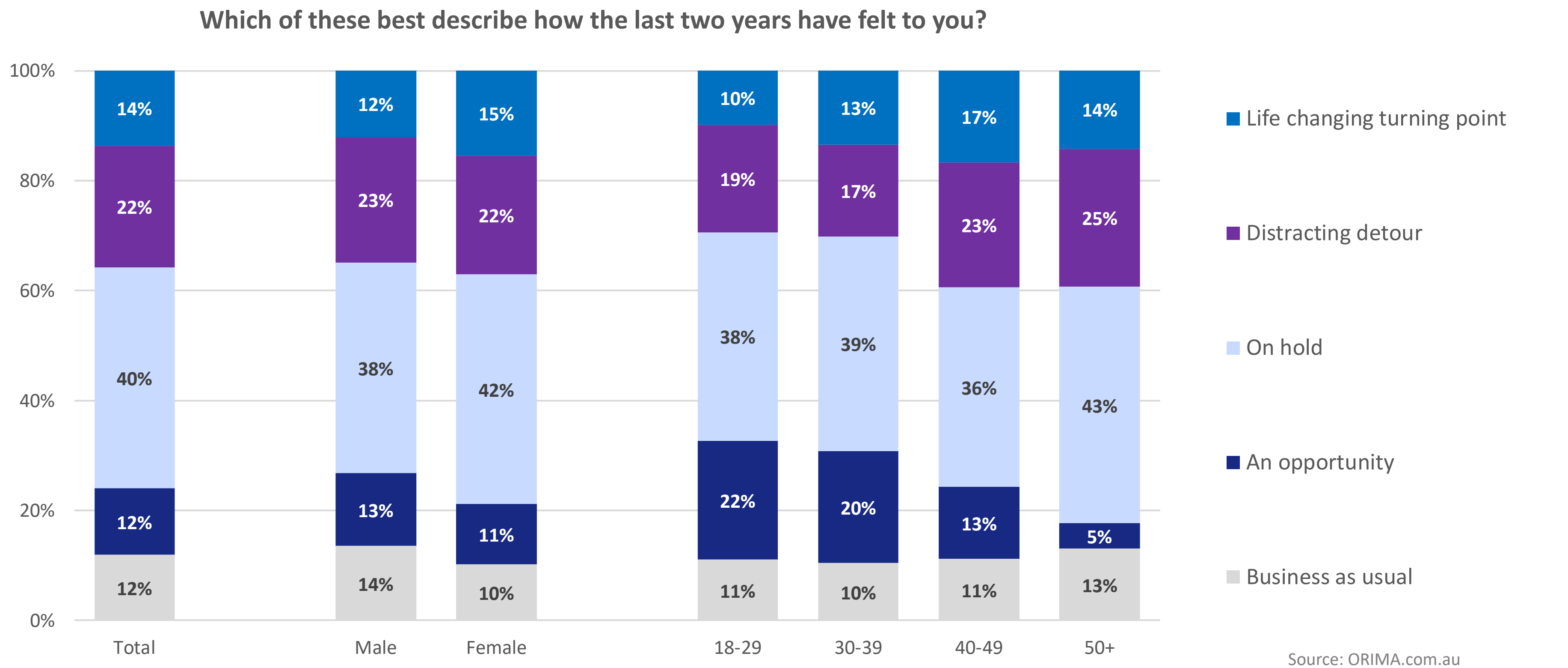
Source: ORIMA.com.au

Base: All respondents in the April-June and July-September 2022 quarters (n=2499)

Reflections on the COVID period

During 2020 and 2021 many times COVID was described as having paused our normal lives, or put them "on hold". As the pandemic stretched into 2022, we were curious to understand more about how people perceived this phase of their lives. When asked across the April-September 2022 period, around 2-in-5 people did describe the pandemic as feeling like they *were on hold*. This proportion was fairly consistent across age and gender. The biggest difference was in the proportion who felt it had been *an opportunity*. 12% overall felt this, but this varied from 5% of those aged 50+ up to more than 20% of those aged 39 and under. 22% described it as a *distracting detour*, 14% as a *life changing turning point*, and 12% as *business as usual*.

How the pandemic phase has felt



Base: All respondents in the April-June and July-September 2022 quarters (n=2499)

Reflections on the COVID period

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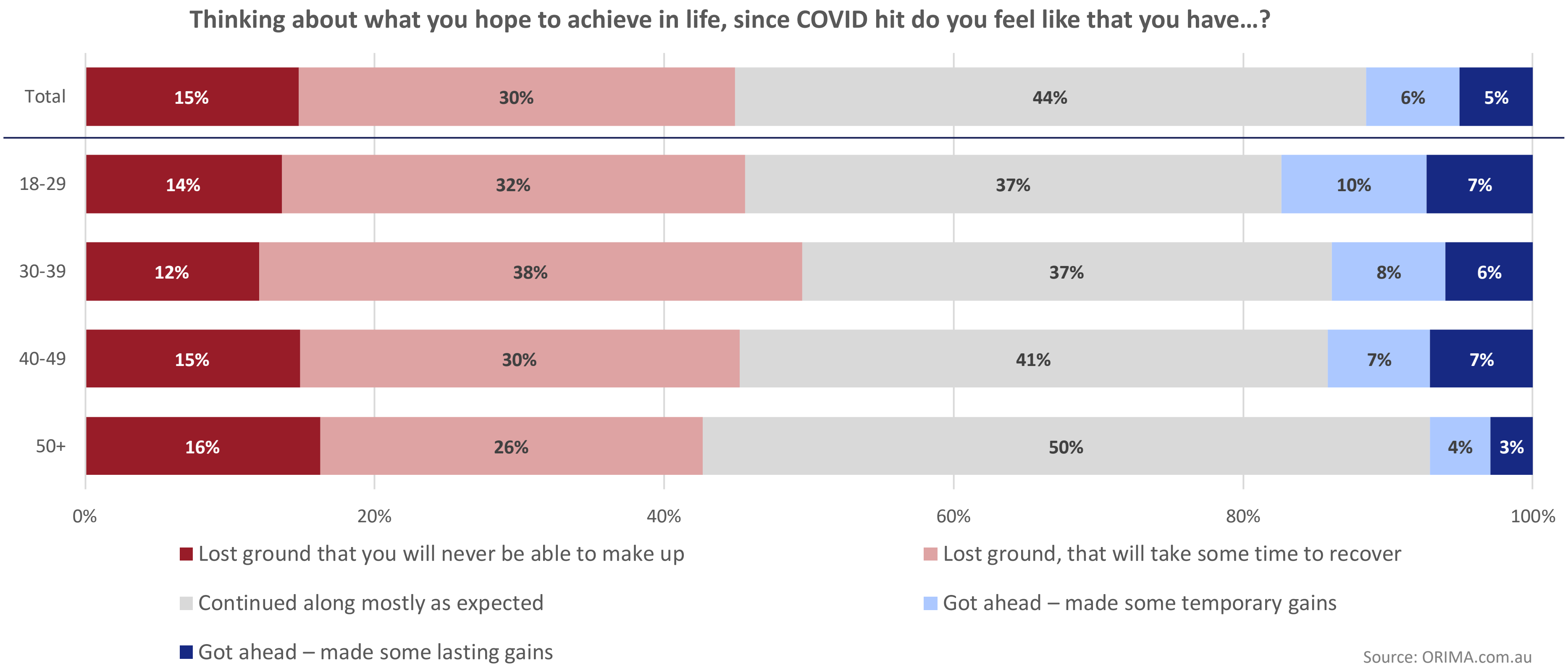
Four times as many CRT respondents felt that they had lost ground during COVID (45%) as those who felt that they had got ahead (11%). 15% felt they had lost ground that they would never make up, compared to just 5% who felt like they had made lasting gains. The proportions who felt they had lost ground did not really vary with age much – but older people were, not unexpectedly, the least likely to feel that they had got ahead during COVID. There were no differences by gender.

Gaining or losing ground during COVID



Source: ORIMA.com.au

See next section for a segmentation that combines perceptions of gaining or losing ground, the period of life that was affected by COVID, and how much respondents want life to go back to how it was before COVID.

Base: All respondents in the April-June and July-September 2022 quarters (n=2499)

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Differential experiences

Since its inception the CRT project has mostly looked at high level results – at the national level, or individual states. In places we have explored the different experiences of major demographic groups in our community, splitting results by age, gender and disability at different points in time.

Now that the tracking shows much of our community apparently starting to look beyond COVID, the content of the CRT has been updated to include new sections on how people feel the pandemic has impacted the trajectory of their lives.

This section looks at how different segments of the population are feeling as they start to move beyond the pandemic. It uses a variety of perspectives to let us see a more nuanced view of how different groups of people in our community might be feeling at this time.

Analysis in this section is based on data from April-September 2022.

Segments based on how life feels now

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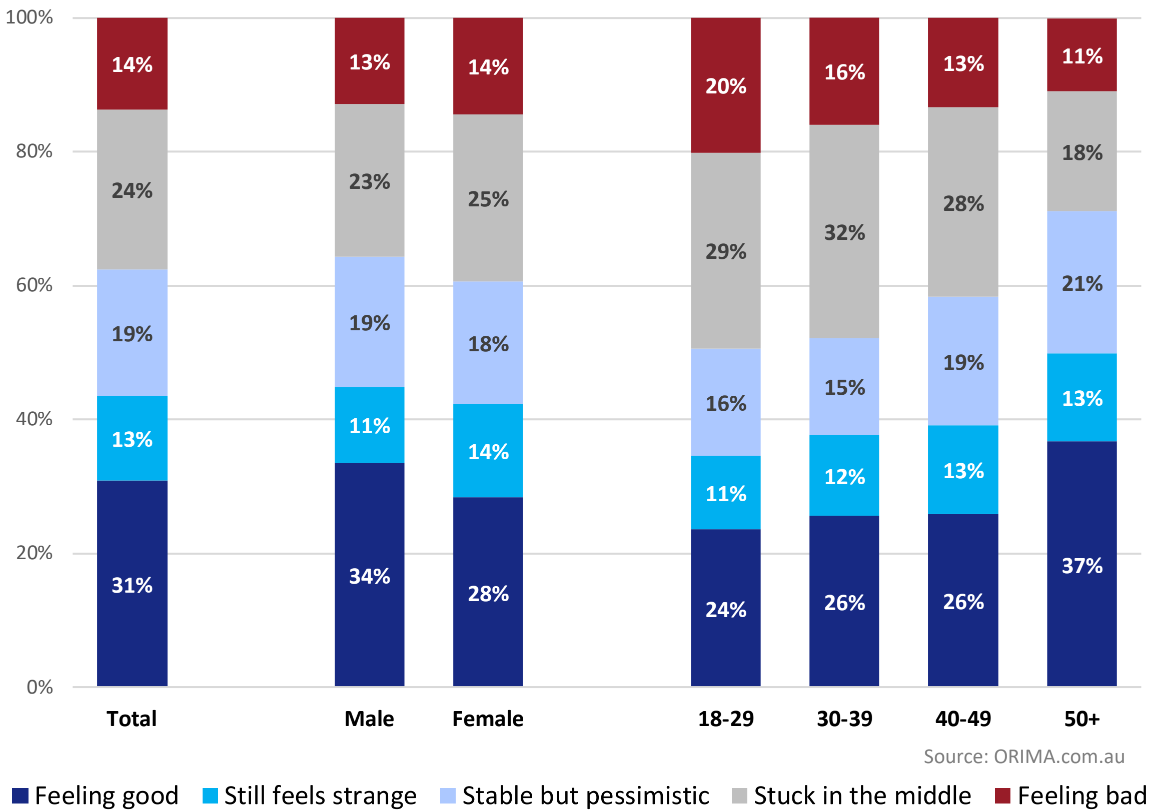
When we consider a range of core CRT indicators that relate to how life feels to people together, several segments with quite different patterns of responses emerge. At the top end, 31% gave high ratings to all four components, and can be thought of as "*feeling good*". At the other end there are 14% who are "*feeling bad*" across all four components. 13% consider they have good control and high life satisfaction – but things still don't feel normal to them; while 19% score highly on normality and control, but are feeling somewhat pessimistic. Nearly a quarter (24%) seem "*stuck in the middle*" – not feeling strongly in either direction on any of these components.

There is little difference by gender, but younger people are more likely to either feel bad or feel stuck in the middle.

How life is feeling



Source: ORIMA.com.au

This segmentation is based on:

- **Life satisfaction**
- **Sense of control**
- **Feeling of pessimism <-> optimism**
- **Sense of normality**

The segments that are derived from these indicators are named based on their absolute scores and relative patterns.

"**Feeling good**": Scores high on all components.

"**Still feels strange**": Score moderately high on life satisfaction and control, neutral on optimism – but low on normality.

"**Stable but pessimistic**": Score high on control and normality, but more moderately on life satisfaction and are somewhat pessimistic.

"**Stuck in the middle**": score at the mid-point on all four individual components, as though they don't have clear views on any of these aspects.

"**Feeling bad**": score negatively on all components.

Segments based on how life was impacted

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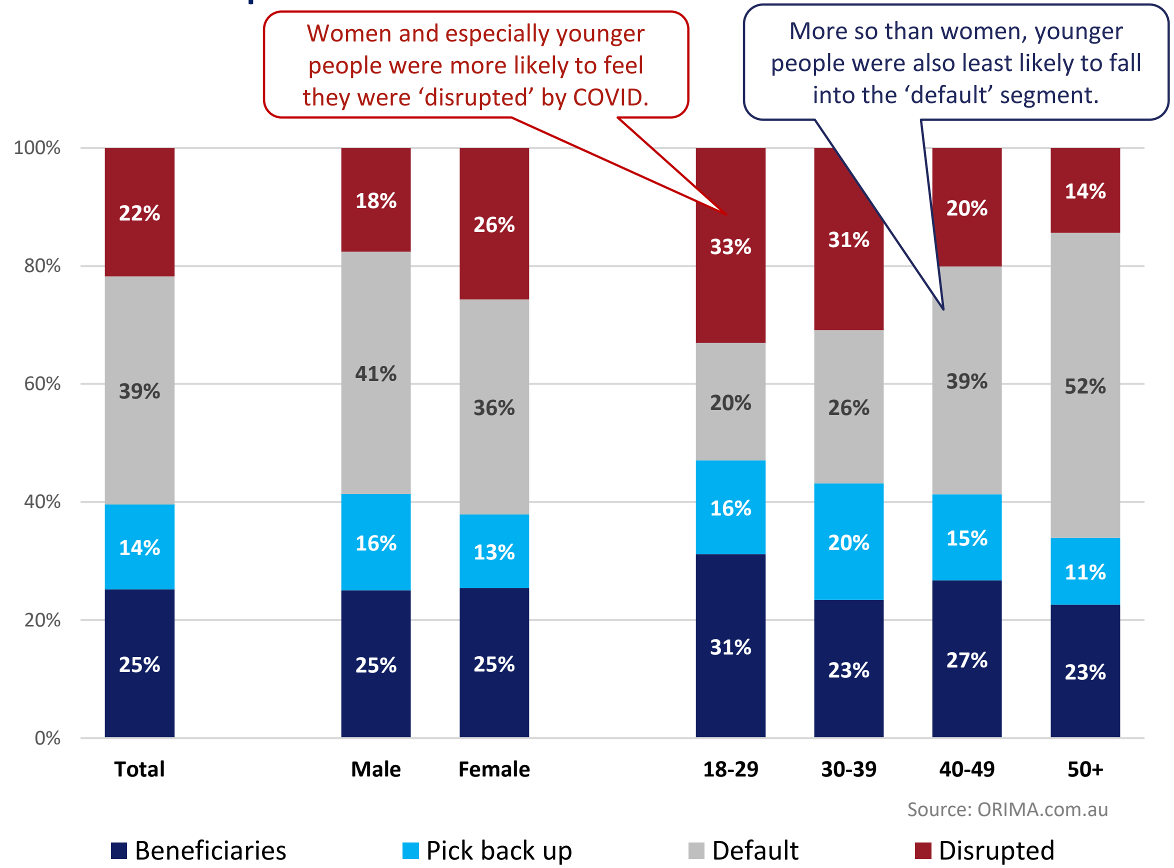
When COVID impacted Australia, some people felt they were at more or less critical periods in their lives. As shown elsewhere in this report, while many people felt negatively impacted by COVID, a smaller proportion felt they benefited or gained ground during COVID. The combination of these factors is related to how much people would like their lives to go back to how they were before COVID.

The segments of the community who would most like their lives to go back to how they were before are (1) those who were at a more important part of their lives but did not really gain or lose during COVID, and (2) those who were at a less critical period and who *did* lose during COVID. On the other hand, those who were at a critical period and felt they lost ground during COVID are less likely to want things to go back to how they were; as do the more 'opportunistic' segment who were not at a critical time, but felt they gained during COVID.

How life was impacted



Source: ORIMA.com.au

This segmentation is based on:

- **How critical was the time of life affected by COVID**
- **Whether gained or lost through COVID**
- **How much want life to go back to how it was before COVID**

The segments that are derived from these indicators are named based on their absolute scores and relative patterns.

"**Beneficiaries**": COVID did not affect a critical time of life, but they gained a little and now do not want life to fully go back how it was before COVID.

"**Pick back up**": Were at an important point in their lives, but did not gain or lose through COVID – and would like life to go back how it was before.

"**Default**": Were not at a critical period, but lost ground during COVID and would now like life to go back to how it was before.

"**Disrupted**": COVID affected an important phase of their lives, and they feel they lost ground during it – they do not want life to go back how it was.

How these segments view their lives

These segments of the community feel quite different on the components that make up the segment definitions – but also quite differently on many of the other indicators in the CRT. As the table below shows, splitting out the segments based on how life feels now to individuals shows there is a very wide range of views both above and below the overall averages. Using this segmentation, the segment that is *feeling good* feels much more positive than the overall average results for all these indicators. However, the smaller segment who are *feeling bad* have much higher levels of concern about moving to a post-pandemic lifestyle, and lower levels of satisfaction with government responses. When looking at all the results shown in the CRT, it is important to remember this diversity sitting underneath the overall averages. For some people, the idea of moving on from COVID remains something they are not (yet) comfortable with.

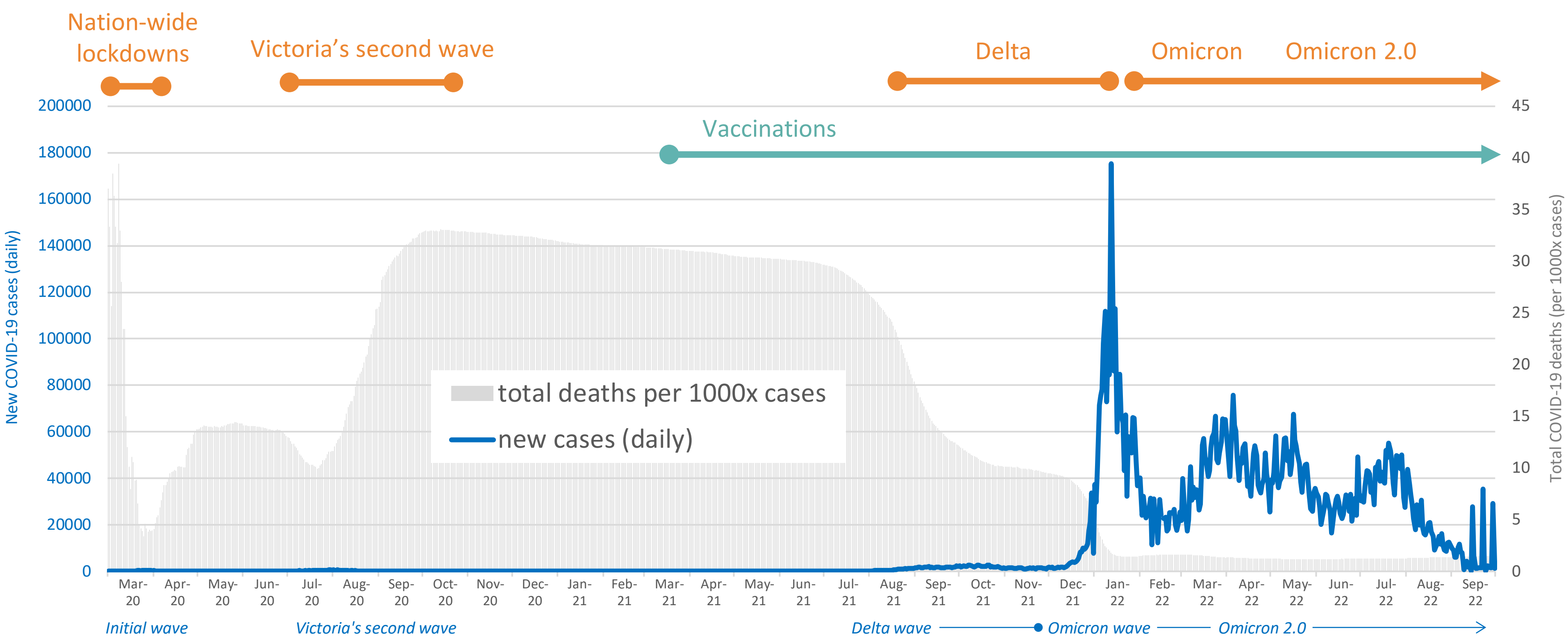
Segments based on how life feels	**Feeling good**	**Still feels strange**	**Stable, but pessimistic**	**Stuck in the middle**	**Feeling bad**	**Total**
Segment size	*31%*	*13%*	*19%*	*24%*	*14%*	
Satisfaction with Aust.Gov response	6.4/10	5.3/10	5.1/10	4.6/10	3.5/10	**5.3/10**
Satisfaction with State Gov response	6.7/10	5.9/10	5.6/10	5.1/10	3.9/10	**5.7/10**
Concerned about opening up between states	9%	12%	11%	14%	32%	**14%**
Anxious about being in large crowds	19%	32%	27%	34%	52%	**31%**
Anxious about participating in sport, exercise and recreation	3%	5%	9%	12%	30%	**10%**
Anxious about going to usual workplace	2%	5%	3%	10%	24%	**7%**
Quite or extremely concerned about financial security	14%	24%	19%	30%	66%	**27%**
Quite or extremely concerned about risk to personal health	15%	19%	16%	25%	51%	**23%**

Case numbers & exposure

Phases of the pandemic

The CRT continues to track how our community is feeling at each stage of the pandemic, and the impact of each new COVID variant. 2022 has seen a dramatic increase in the number of cases in Australia, and several waves of infection. However, throughout this calendar year, the number of (known) deaths per 1,000 (known) cases has remained steady at a relatively low level. The changes in fatality rates coincide very clearly with the vaccination program, and then the emergence of omicron.

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



ORIMA.com.au

Source: ourworldindata.org (current as at 30/09/22)

Personal familiarity with COVID

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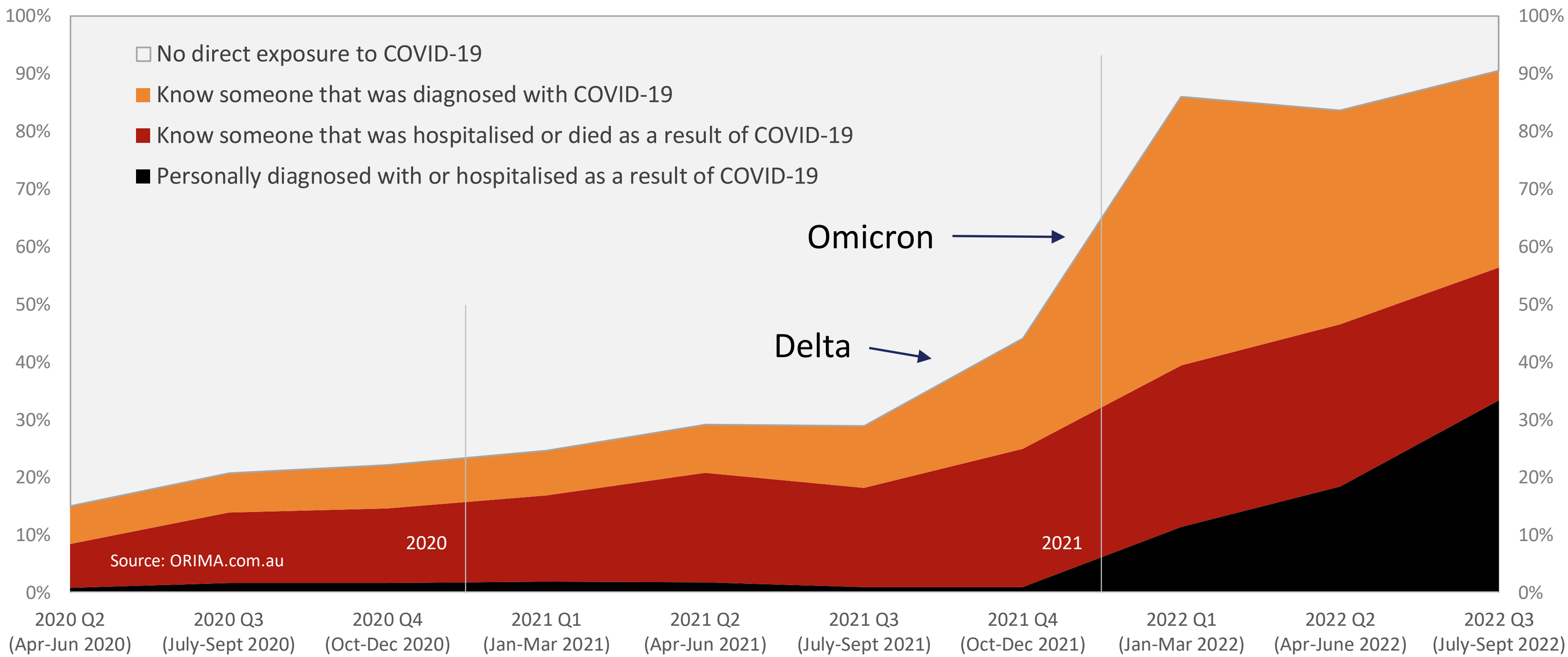
The level of personal proximity to COVID as a disease has continued to steadily rise since the emergence of the omicron variant in early 2022. Knowing someone who had had COVID became common with the delta wave in late 2021, and is virtually ubiquitous in 2022. As of Q3 2022 around 1-in-3 CRT respondents report having personally had COVID themselves, and close to one quarter know someone who has been hospitalised or died of COVID.

Highest personal level of exposure to COVID-19



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

Current results and report archive available at:

[CRT Dashboard (orima.com.au)](orima.com.au)

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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