



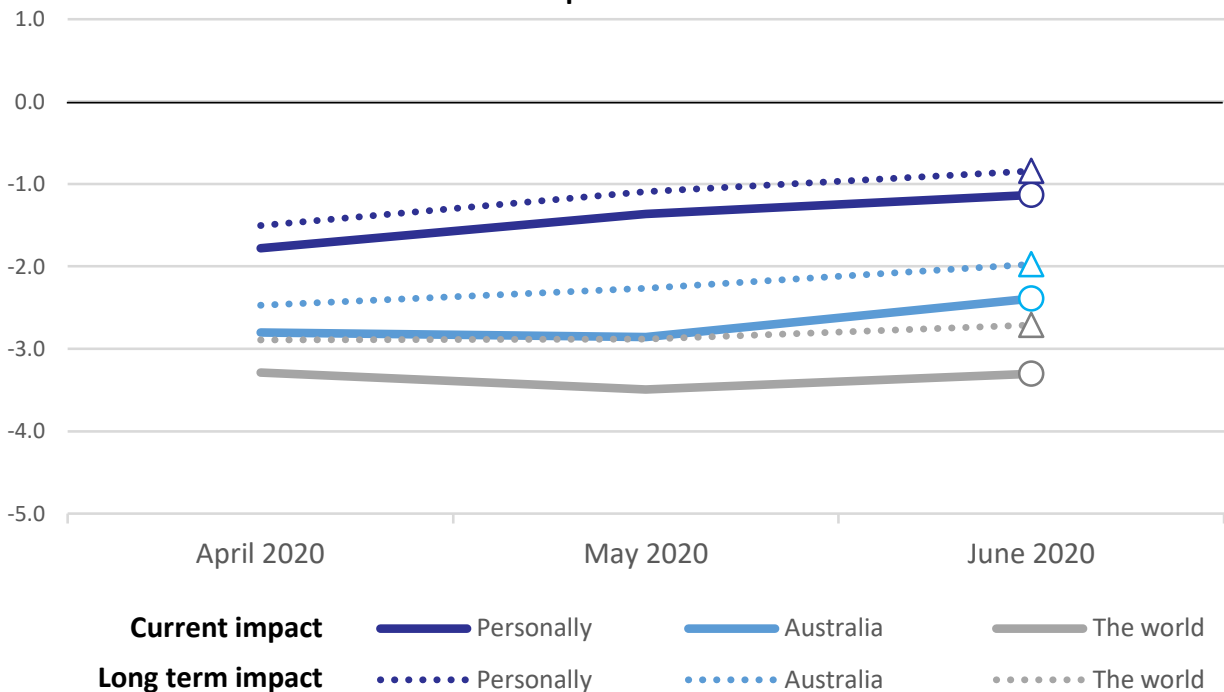
As COVID-19 restrictions relinquish their grip on most of Australia, we are starting to get a vision of the Australia that is emerging. In comparison to how things might have been, and perhaps how we suspect they are in other parts of the world, we don't seem to be feeling too bad. That said, some of the changes that have happened from April to June are less positive. Perceived negative impact of COVID is continuing to ebb, both for the individuals and for the country. However, while some of the most negative impacts are diminishing and some mood indicators are moving into positive territory – some of the supportive community responses we observed in April are also fading away.

COVID-19 impact continues to ease in Australia

Australians' sense of personal negative impact from COVID-19 was felt most keenly as the pandemic became a daily reality in April, but has steadily lessened through to June. In that time, the proportion who say they are negatively affected at the moment has dropped from 77% to 65%.

While personal impact started to diminish almost immediately, perceived *national* impact behaved somewhat differently. Despite the reduction in personal impact, it evidently took longer for this to be felt at a collective level, taking until the first of the June surveys before we started to see improvement. In terms of perceived global impact, we still haven't seen a reduction, and the gap from Australia to the world is now the biggest since the surveys began.

Perceived impact of COVID-19



Data source: nationally representative surveys (n=498-501 per wave. Total sample size n=3,005) Source: ORIMA.com.au

Throughout, Australians have consistently felt that the long term impact of COVID-19 will be somewhat less negative than it is at present. For both ourselves and the country, not only have we tended to feel the negative impact waning, but so too have we wound back our expectations of how bad it might be in the long run. Both these patterns suggest that Australians continue to see COVID-19 as a distinctly negative influence, but one that is survivable. For the moment, our views of the global situation have yet to show much sign of turning a corner.

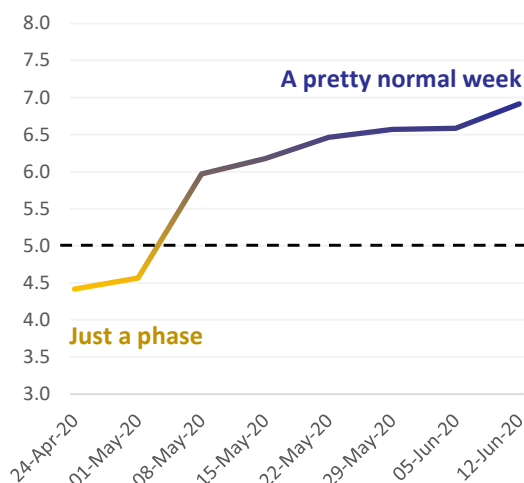
Mood and experiences are less extreme, but that's not all good news

As our sense of negative personal impact has reduced, so too do weeks feel like they have become increasingly 'normal'.

In late April when we started asking this question, typical responses were below the middle of scale, indicating that things felt more unusual than usual to people. By early-to-mid May though, that had flipped around to the typical response being just above the mid-point of the scale. Since then, the level of 'normality' has continued to steadily rise, hitting 6.9/10 by the week ending 12 June.

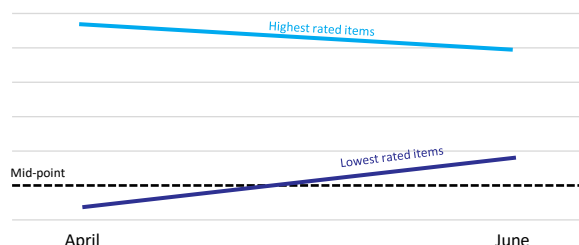
As normality goes, it might still have some distance to go before it truly feels *normal*, but it is a big improvement on where we were in April.

Does this last week feel more like...

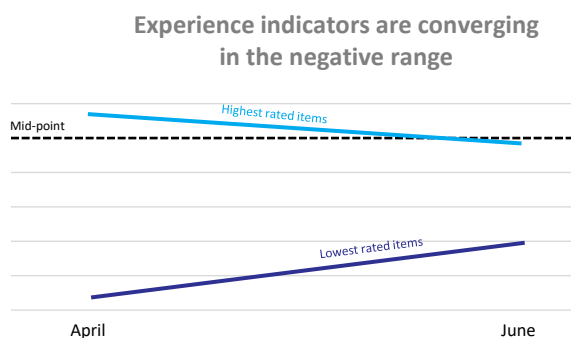


Data source: open-link community survey. Weekly samples n=51-239. Source: ORIMA.com.au

The survey contains a wide range of mood (10) and personal experience (13) indicators. At the start of the survey these were widely spread. Since then the lowest rated items have all got better, but the best rated items have all gotten worse – and so the overall effect is to narrow the range across the community. Overall, the mood indicators are converging on a point slightly on the positive side of the scale, while the personal experience indicators are converging on the negative side of the scale – pretty much exactly where overall personal and national impact is rated.



Mood indicators are converging in the positive range



Experience indicators are converging in the negative range

Looking at what has improved from April to June tells a promising story. Australians overall report being more energised, optimistic and confident in June compared to April. At the same time, the negative impact has reduced on some of the most important and most impacted aspects of life – work, income, health and perceived safety.

What has improved April to June

Mood indicators

- Energised or Exhausted +0.9
- Optimism or Pessimism +0.7
- Confident or Unsure +0.4

Personal experience indicators

- Impact on: Job / Income +20%
- Mental health +18%
- How safe you feel +15%
- Household income +7%
- Physical Health +7%

However, some of the things that have gone *down* from April to June are aspects of society which seemed protective and supportive in the acute phase of the pandemic, but which clearly did not last – or at least, not as strongly as they were first felt. Australians are currently feeling more like giving up than coping, more numb than engaged, and more confused than informed about COVID.

**What
got worse
April to June**

Mood indicators

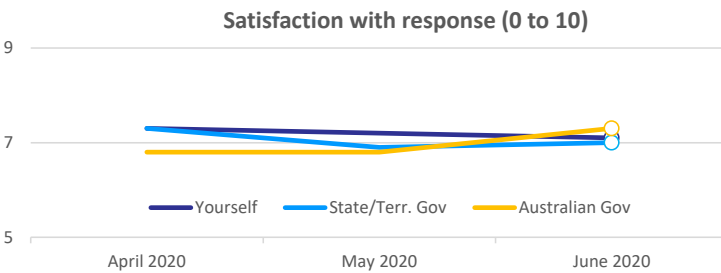
- Giving up** or Coping ^{-0.5}
- Numb** or Engaged ^{-0.4}
- Confused** or Informed about COVID ^{-0.4}

Personal experience indicators

- Feel making a contribution** ^{-10%}
- Dealing with challenge / stress** ^{-10%}
- Feel part of the community** ^{-8%}
- Sense of support** ^{-8%}

The personal experience indicators that have declined might actually be suggestive of how actively many parts of the Australian community responded supportively and collegially at the outset, and that this burst has either fallen away slightly or become sufficiently normal that we don't notice it now. The drop off in people feeling part of the community, a sense of support and like they are making a valuable contribution is something we will want to watch carefully over the coming months. Potentially these markers could be early warning signs of a community that is becoming less cohesive and connected if they persist or drop further.

The important role of governments



Data source: open-link community survey. Monthly samples n=210-791. Source: ORIMA.com.au

Since the outset of COVID-19 Australians have generally been satisfied with the response of both themselves, and their governments.

Out of 10, scores have typically hovered around 7/10, and they remain there in early June. State and territory governments were rated slightly higher than the Federal Government in April, but that pattern is reversed in June.

There has been a net positive rating for trust in leadership across the period, and consistently around 1-in-5 people feel that Australians have developed a greater respect for the complexity of government decision making as a result of the pandemic (though 50%-60% disagree this has happened).

	<u>April</u>	<u>May</u>	<u>June</u>
Trust in leadership <i>-5 = Distrust ← → +5 = Trust</i>	+1.0	+0.5	+0.9
Greater respect for the complexity of government decision making <i>% Definitely or Probably True</i>	22%	19%	24%

Data source: open-link community survey. Monthly samples n=210-791. Source: ORIMA.com.au

Taken together, these results suggest the community has broadly supported government action and decisions. That is consistent with both the social narrative, and with the high levels of compliance that have allowed a largely effective response to the pandemic, at least in terms of containing it.

What governments can do next

Of the 1,500+ people who have completed the open link survey since April, three quarters have given a free text answer to a question about what governments can do to make a positive impact on their lives in the next few months. Their responses are unsurprising, but still revealing.

The largest theme has continually been to be *supportive*, though rarely have comments been so strong to be classified as *protective*, perhaps suggesting the tone that people want to see. In April comments about *communication* and *leadership* were quite common, but these have declined through to June, and alongside the previous results this might indicate they are being delivered.

About a quarter of comments in each month have related to *opening things up*, though many emphasise doing this in a slow and careful manner. Another quarter of comments each month have been about *maintaining / keeping up measures*.

Support – the economy

“Mainly trying to get the economy going again, helping decrease unemployment rates and opening-up workplaces”

“Fast track infrastructure projects. Implement red tape cutting to allow Art & Sport, Cultural events to recover lost ground by having a way to generate income”

Support – individuals and the community

“Making decisions to protect the health and safety of people living in Australia”

“Give something back to the middle income earners, they have helped out low and high income earners but done nothing for the rest of us”

Open up – carefully

“Don't rush back to normal. The virus is still out there”

“Just slowly get back to normal but don't rush”

Maintain – keep doing what doing now

“Keep restrictions going as long as needed, I would hate to see the second wave that requires the hard restrictions to come back into play”

“Keep us safe and keep borders shut”

“Keep up the work they have done”

Communicate – openly and transparently

“Send clear, easy to understand messages about expectations for the medium and short term - not just the next 2 weeks”

Lead – balanced and careful decisions

“To be calm, don't panic - make good decisions, and change them if need be to cover things that might not have been thought of”

COVID-19
RECOVERY
TRACKER



The CRT project will continue to gather data across different surveys and sources, to track the impact of the pandemic on Australians, and to look for signs that we may be entering the recovery phase. The next update is expected in the second half of July.

CRT data is aggregated from a range of national and more targeted surveys, and from an open-link community survey which can be completed online by anyone ([do the survey here](#)). Participants who register for the survey can ask to be advised when results are updated, or to be reminded to do the survey every 1, 2 or 3 months. Volume 4 is based on n=3,005 responses to nationally representative online surveys, and n=1,563 responses to the open link survey between April and June 2020. Data is classified into weeks defined from Friday midnight to Friday midnight.

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