CRT update 20 August 2020 Volume 6

Data from across the COVID-19 Recovery Tracker (CRT) surveys shows Australians are increasingly feeling the negative impact of the pandemic in July and August.

Both personal and national negative impact continue to build, with increasing differences across states emerging. Impact at a personal level was at its least negative in mid-June, and quite consistent across jurisdictions. Since then, as the negative impact has grown, experiences by state have diverged more so than even at the beginning of the pandemic.

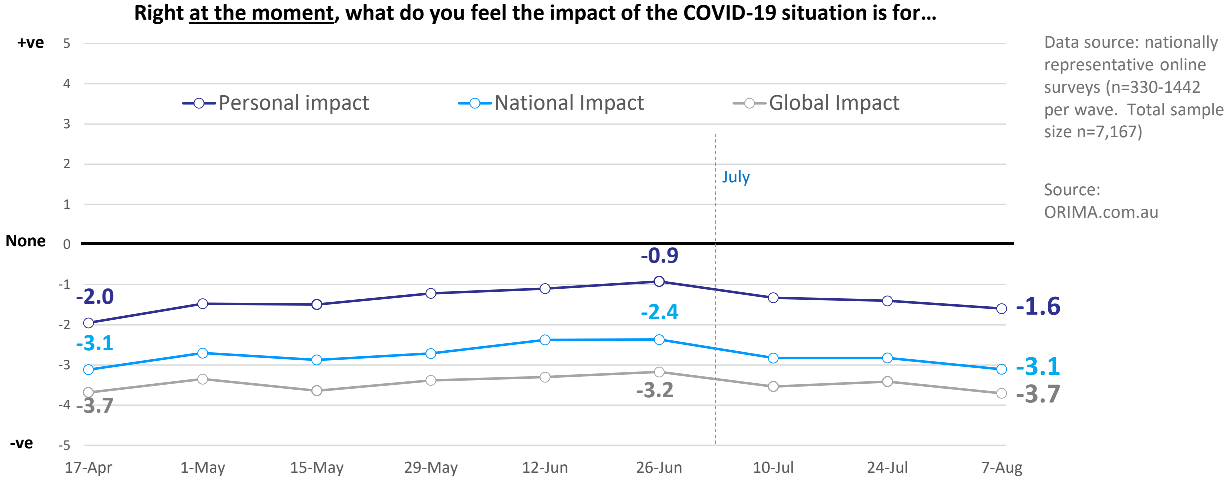
Mental health impacts have become more widespread than employment impacts, with a sharp spike in the proportion who feel their mental health has been *very negatively affected* since July. There are a number of other specific mood indicators that have steadily fallen slowly throughout the CRT tracking period – relating to feelings of hope, coping, safety and of being informed.

Negative impact of the second wave continues to build

From April to mid-June, perceptions of the negative impact of COVID-19 eased. July however saw the re-emergence of the virus in Victoria, knock-on effects of border closures impacted much of the country, and small numbers of cases appeared in other jurisdictions. As this occurred, the fortnightly COVID-19 Recovery Tracker (CRT) data showed an immediate change in negative impact felt at a personal and national level, and the magnitude of this negative impact continues to build further into August.

Current results show **perceptions of national impact are back at the level that they were when the survey commenced in April (pre Easter)**, and that personal impact is not far away from April levels too.

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



Aside from picking up the improvements in perceived impact in earlier months, and then a recent decline, the other striking feature of the tracking chart is the consistency of the relationship between personal, national and global impact. Respondents have consistently rated national impact as worse than their own personal impact, and global impact as slightly worse again.

The disparity between personal and national impact may be in part explained by the fact that relatively few people have first-hand experience of COVID-19 as a disease. **Only 19% of respondents to all CRT surveys in July know someone who has actually had the disease, and only 4% know someone close to them who has.** For most people, the *personal* impact is more limited to social and economic effects, whereas they can see the larger range of effects on the *country* through media and news.

We may all be in the same storm, but we are not all in the same boat

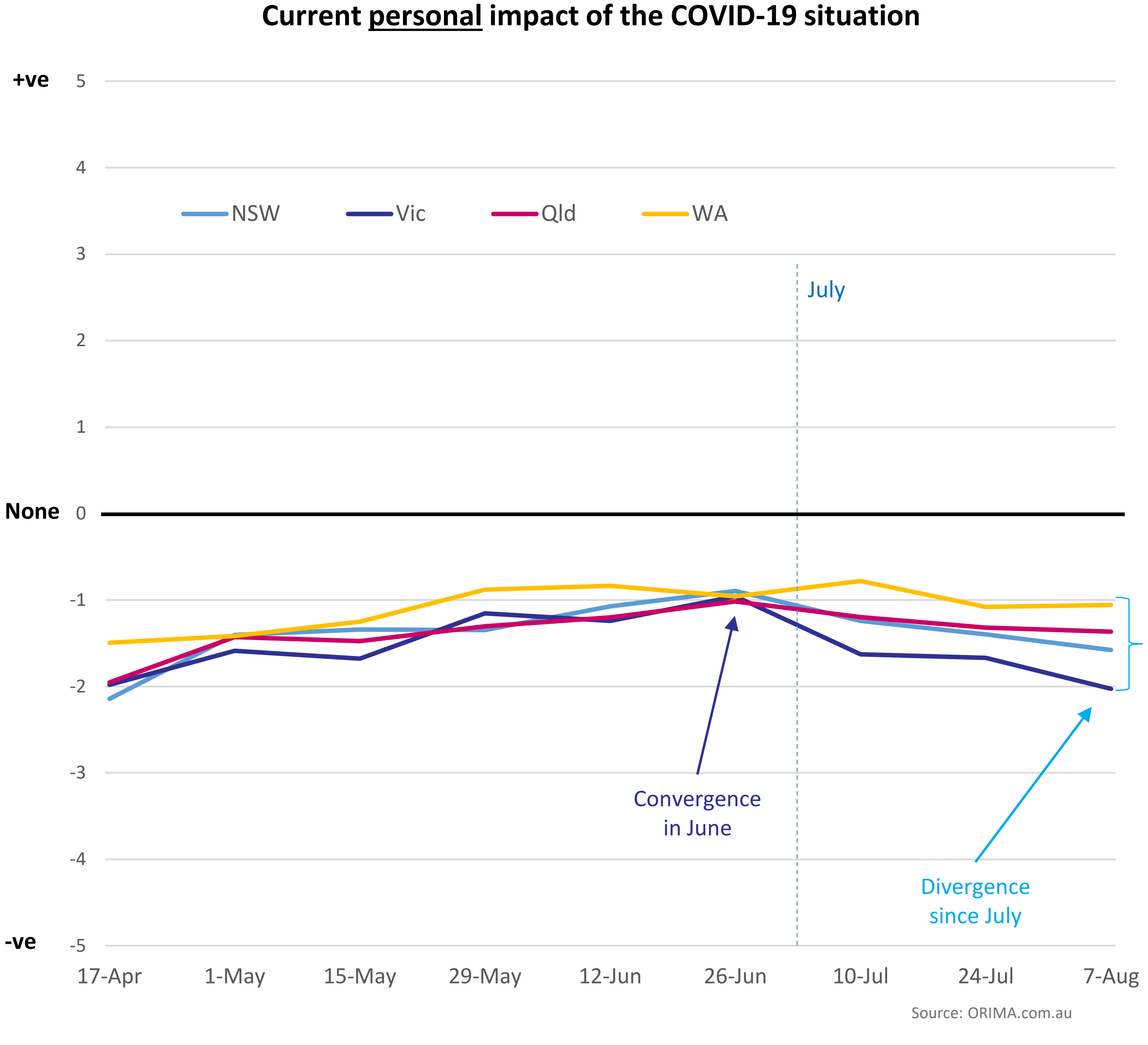
The previous charts track the national sense of impact, and tell a clear story. A defining characteristic of the Australian experience of COVID-19 has been the state-level responses, and this has been particularly the case since July. While Victoria is an obviously distinct case, other states and territories have varying levels of restrictions. In August, travel between virtually all jurisdictions has been extremely limited.

This has translated into different experiences state-by-state. The chart below splits out perceived personal impact (the dark blue line in the previous chart) by state for NSW, Victoria, Queensland and WA. Sample sizes for other states and territories are small and inherently show more fluctuations, but for the most part they fall within the range defined by these larger states.

The tracking chart shows that **feelings across the country improved in unison from April to June, and were converging on a very similar national sense of impact in mid-June. Since then however, we have seen both a rapid deterioration and much more disparity across states**.

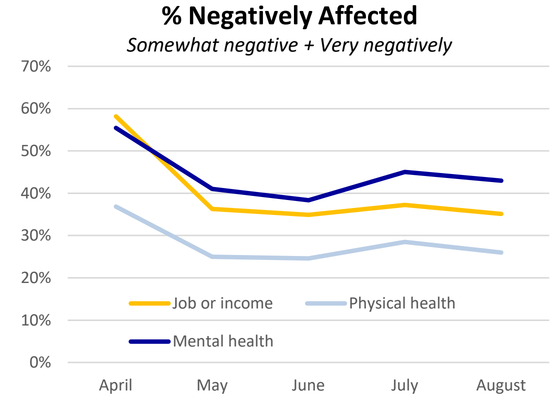
NSW and Queensland have tracked similarly, and similarly to the national pattern.

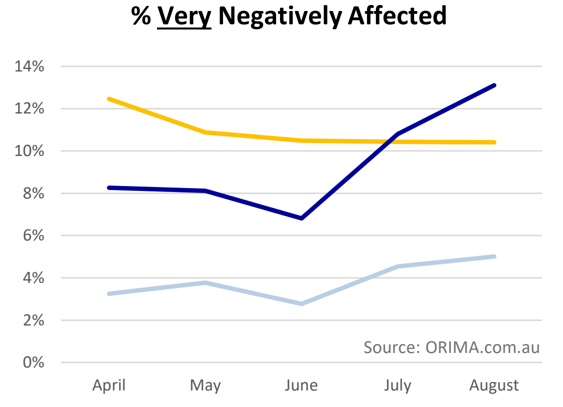
Perhaps unsurprisingly, WA defines the top of the spread of state perceptions, and Victoria the bottom of the spread. WA has fallen back a little compared to its absolute peak figure, but still sits well above the other states. Victoria though has fallen back to a level as low as observed in any location at any time since the CRT has been running, and the current trajectory is falling further.



Negative impact on mental health increasing

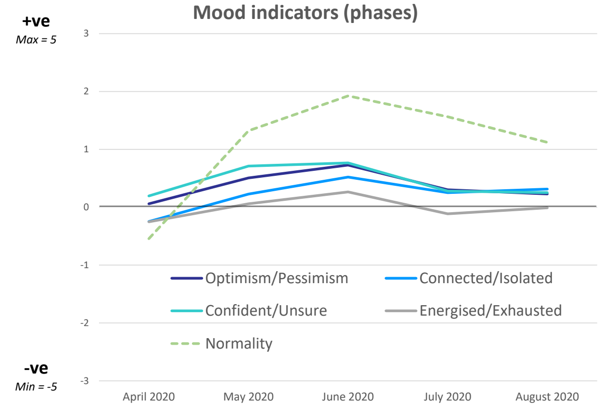
The sense of impact on mood is shown in direct reflections of mental health. The two charts below show the proportion of people who feel their mental health has been negatively affected *to any extent* on the left, and just those who feel *very affected* on the right. It shows a **consistent greater impact on mental health and employment more so than on physical health**. The total chart (left) shows mental health becoming the more prevalent negative impact than employment through the course of the pandemic so far, but the right chart clearly shows **a spike in significant impact on mental health since July**.

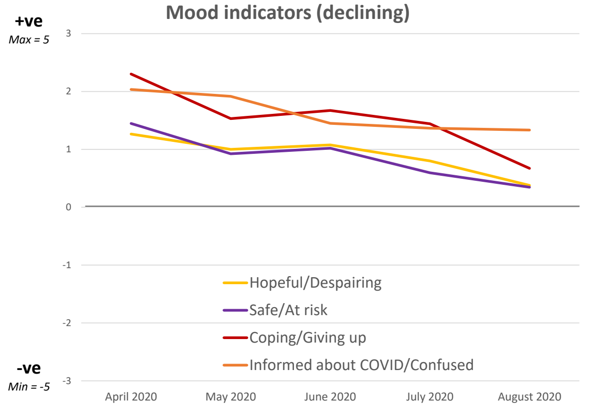




A number of specific mood indicators have followed a similar pattern to impact, building through to June, and then falling away again. The left hand chart below shows the average balance on a number of dimensions – optimism/pessimism, connectedness/isolation, confident/unsure and energised/exhausted. All of them follow a similar pattern, holding at about the mid-point of the scale in August, as though they could yet go either way. The sense of 'normality' follows a similar pattern.

On the right though, we see **several other mood indicators that have followed quite a different trajectory – falling slowly but steadily since April**, even during the period when the perceived impact was less negative. These dimensions are **hopeful/despairing, safe/at-risk, coping/giving-up and informed/confused about COVID**. The coping/giving up balance in particular has fallen considerably.





Source: ORIMA.com.au

CRT data is aggregated from a range of national and targeted surveys, and an open-link community survey which can be completed online by anyone (**do the survey here**). Volume 6 is based on n=7,167 responses. Data is classified into weeks defined from Friday midnight to Friday midnight. The next CRT update is expected in mid September.

General Enquiries	Client or Organisational Enquiries	Media Enquiries
CRT@orima.com	**David Bruce** Associate Partner David.Bruce@orima.com	**Szymon Duniec** Managing Director Szymon.Duniec@orima.com