

# AUS LIANOW

Report: 11 December 2020

# Understanding COVID

These are unprecedented times.

Using cultural tracking expertise and leveraging 25 years of insights generated from AustraliaSCAN, AustraliaNOW provides an ongoing understanding of Australians' attitudes and perceptions to the COVID-19 crisis.

Capturing emergent themes, how they co-exist and inter-relate, this study will explore and define what this means for organisations and brands to help them prepare for and navigate the days, weeks and months ahead.

Culture and society cannot be understood with surveys alone – we need to study people in their natural environment and influences around them to provide context and clarity to the results of this research. This complementary approach takes unstructured data from various sources and models it to find themes, behaviours, and feelings.

Above all else, this is a developing process that will evolve as people and culture do and will help us understand what has changed, however temporarily or permanently, and why.

## Method

- Weekly online survey closely tracking the rapidly changing sentiment of Australians
- More than 1,000 interviews per week, every week since March
- **This report draws from over 44,000 interviews**
- All interviews with those 18 years and over and weighted to a representative national sample
- Integration of 25 years of AustraliaSCAN to provide deep context
- Report fieldwork timing for this report: 26<sup>th</sup> March – 7<sup>th</sup> December 2020

## Search

Google Trendstracks ~1,500 categories of interest which we monitor to see if there are any behavioural changes happening in Australia that might be of interest. It is focused on behavior, not feelings.

## Social

We monitor every Tweet and every Reddit post in Australia that is focused on the current pandemic. We analyse to monitor general sentiment, 8 key emotions, and what's driving them.

## News

We capture 4k Australian News Headlines daily that are captured in 15 minute intervals to show us what the media is focusing on, and how they're going about it in terms of sentiment.

# Reflecting on 2020, and looking forward

## GOODBYE 2020

The ‘**rollercoaster of emotions**’ analogy is an appropriate way to sum up how Australians felt in 2020. There were intense lows in March, a renewed sense of control over the virus and optimism starting to rise in June, only to be dented again by Victoria’s second wave in July.

Now, as we head into Christmas, Australians are **cautiously optimistic**. The dominant emotion is one of hope, especially given talk of an effective vaccine and observations of the impact of new waves in the UK and USA. We are hopeful for a **quiet and uneventful festive period**, and for a **refreshed 2021**.

The sentiment of Australians suggests that we are on the **path towards ‘normal’**. The visible signs of recovery we have been tracking since September continue to be noticed.

Off the back of **unprecedented Government stimulus**, and a committed approach to COVID-19 suppression, we are heading into the Christmas period with **much stronger consumer confidence** than would have been predicted just a few short months ago.

## HELLO 2021

Australians are starting to consider that their quiet confidence will play out for a better 2021. **Younger people** (18-29 year olds), who were arguably the most negatively impacted by the pandemic, show particular **confidence that their circumstances will be better** in 2021.

What Australians are demonstrating is a **guarded optimism**, as we know this is far from over. The **possibility of a third wave** is present and we naturally hold some uncertainty about what may unfold in 2021.

With the majority of Australians thinking they will have a quieter 2021 than usual, save money and limit travel, next year may be a **year of restraint** and possibly a freeing up in the second half. Time will tell.

Importantly, Australians have banked quite a bit of money during this time and once they feel more confident **may start to spend more freely** as the impact of the pandemic wanes and pent up demand, with money to burn, may be realised.

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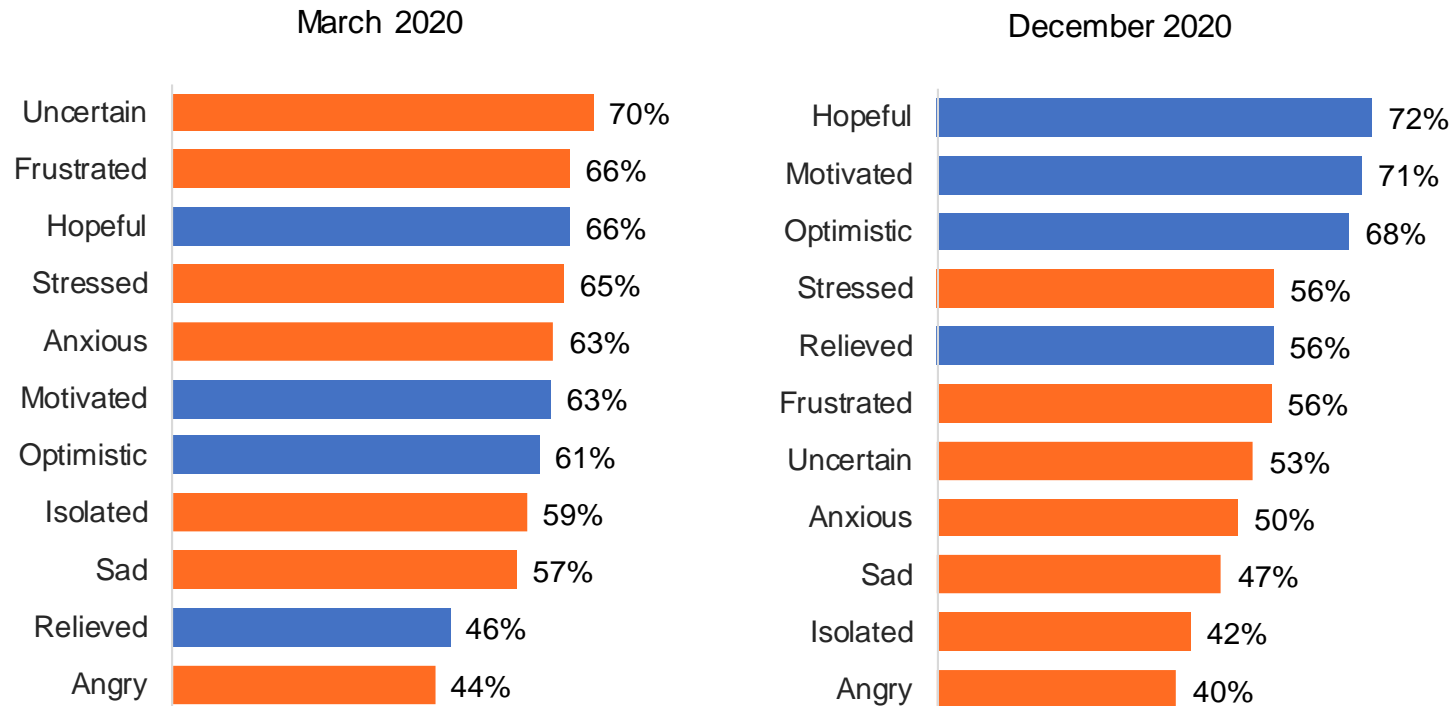
**GOODBYE  
2020**

# Highs and lows of the year that's been

Survey

## Mood

(% sometimes/often felt in past week)



In March, **uncertainty and frustration were rife and we experienced our most intense low.**

The World Health Organization officially classified COVID-19 as a pandemic on 12<sup>th</sup> March and the very next day the Australian Grand Prix was cancelled. Five days later, international borders were shut and office workers around the country packed up their desks to work from home.

Now, in December 2020 as we head into Christmas, thankfully a starkly different, more positive picture has emerged.

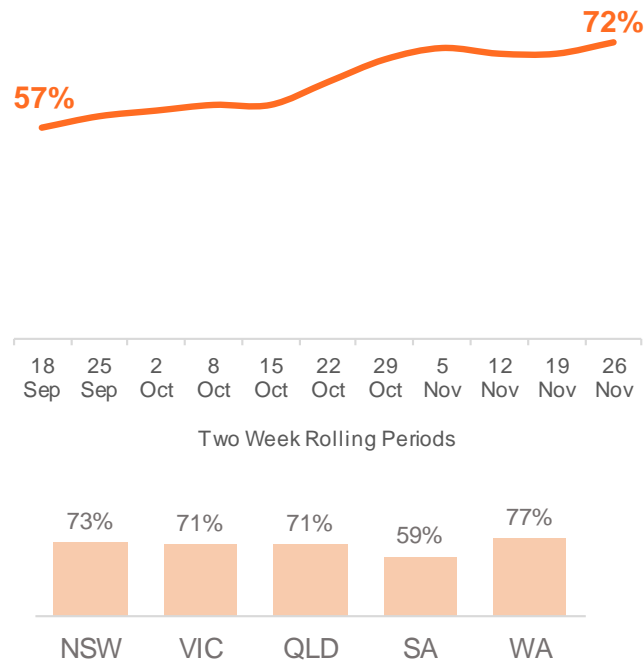
Australians are **cautiously optimistic**. The dominant emotion is one of hope. Hope for a **quiet and uneventful festive period**, and for a **refreshed 2021**.

Q7 - Thinking back over the last week, how often did you feel:  
All respondents, March, n=1,536; December, n=1,001

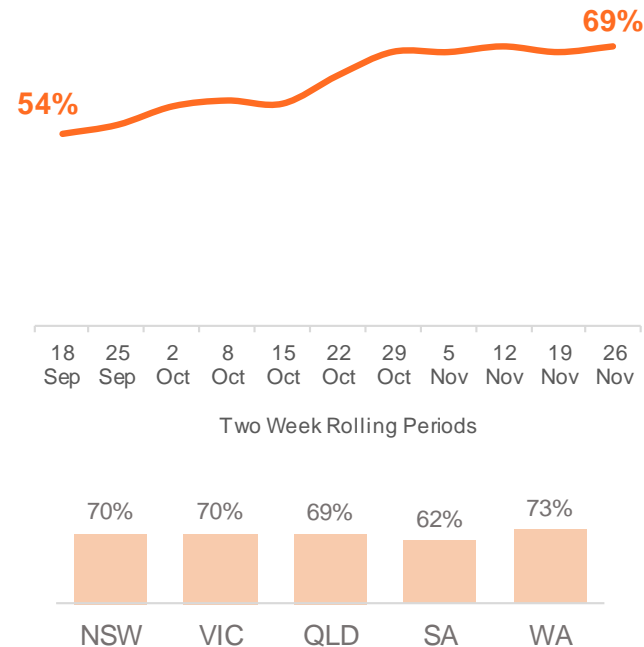
# A COVID-free Christmas

Survey

I am starting to see  
life return to normal around me  
(% Agree – Top 3 Box)



I'm seeing positive signs that  
businesses are recovering in my area  
(% Agree – Top 3 Box)



The situation we are now faced with (going into Christmas with essentially no community transmission of COVID-19) represents **a far better outcome than was anticipated only three months ago.**

Signs are pointing to a **path towards 'normal'.**

Whilst South Australia has had a recent set-back, the majority of people across all States (including Victoria) feel that **we are well on the way to recovery.**

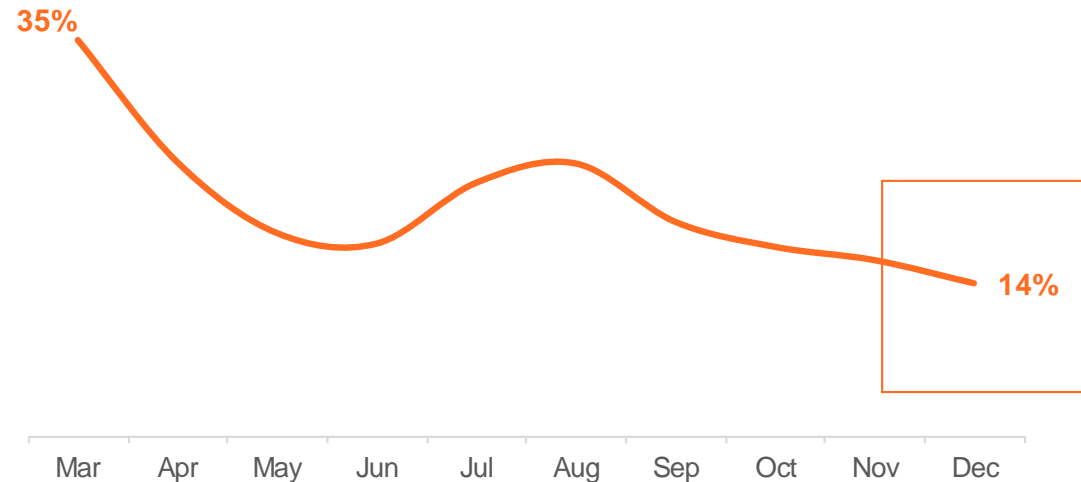
Q127b - Do you agree or disagree with the following statements?  
All respondents, n=c.2,000 per two week rolling period.

# All's well that ends well?

Survey

## Concern about the coronavirus situation

(% Extremely concerned)



Only a minority (14%) of Australians remain extremely concerned about the coronavirus situation. Concern has petered out over time – **so how will we reflect on the year?**

In behavioral science, **the peak-end rule** suggests that our memory of past experiences (pleasant or unpleasant) is formed NOT on an average of positive or negative feelings, but on the **most extreme point and the end of the episode**.

Based on this, and despite periods of intense stress during 2020, we are likely to emerge with a more **neutral recollection** given the positive ending to the year we've had.

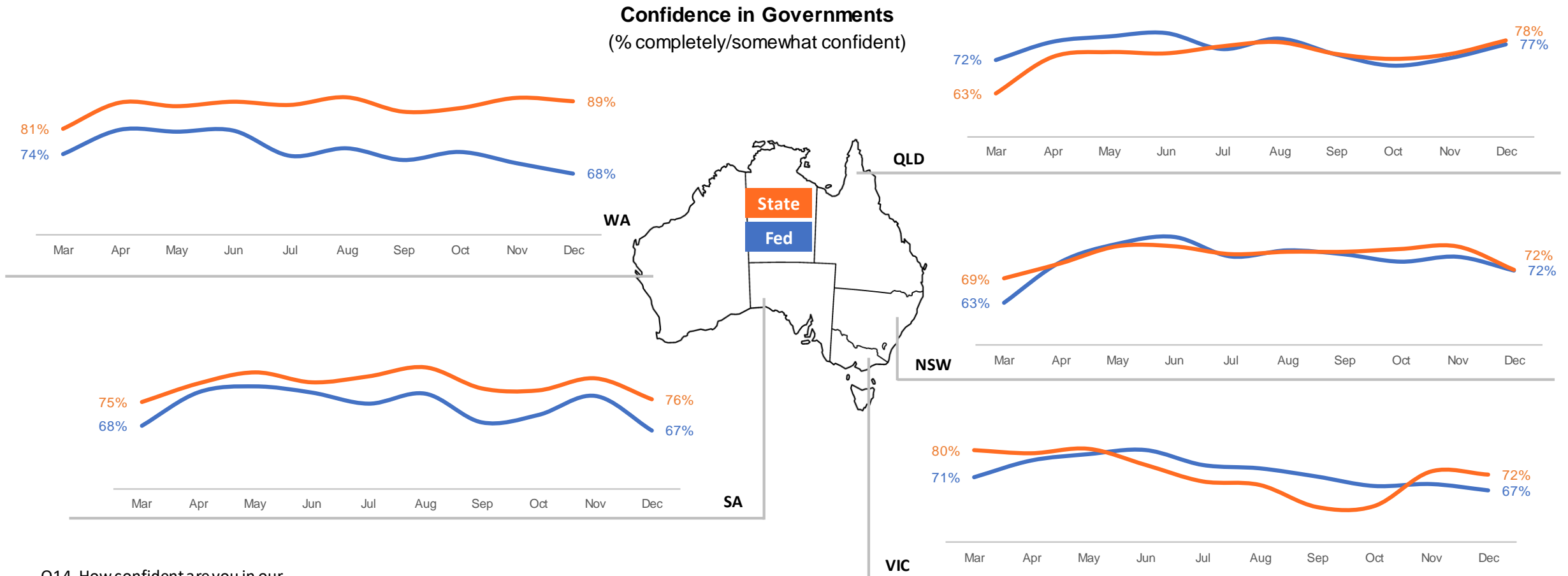
Q8 - Firstly, how concerned are you about the Coronavirus/Covid-19 situation in general?  
All respondents, n=c. 1,500-7,300 per month

Further reading on the peak-end rule:  
<https://www.behavioraleconomics.com/resources/mini-encyclopedia-of-be/peak-end-rule/>

# Our leaders have **risen to the occasion**

Survey

Confidence in Governments – particularly State Governments – has **remained high across the course of the year**, with the exception of the Victorian Government which experienced a dent in confidence through the second wave of the virus, but has since recovered as the actions proved worthwhile and globally acknowledged.



Q14. How confident are you in our...

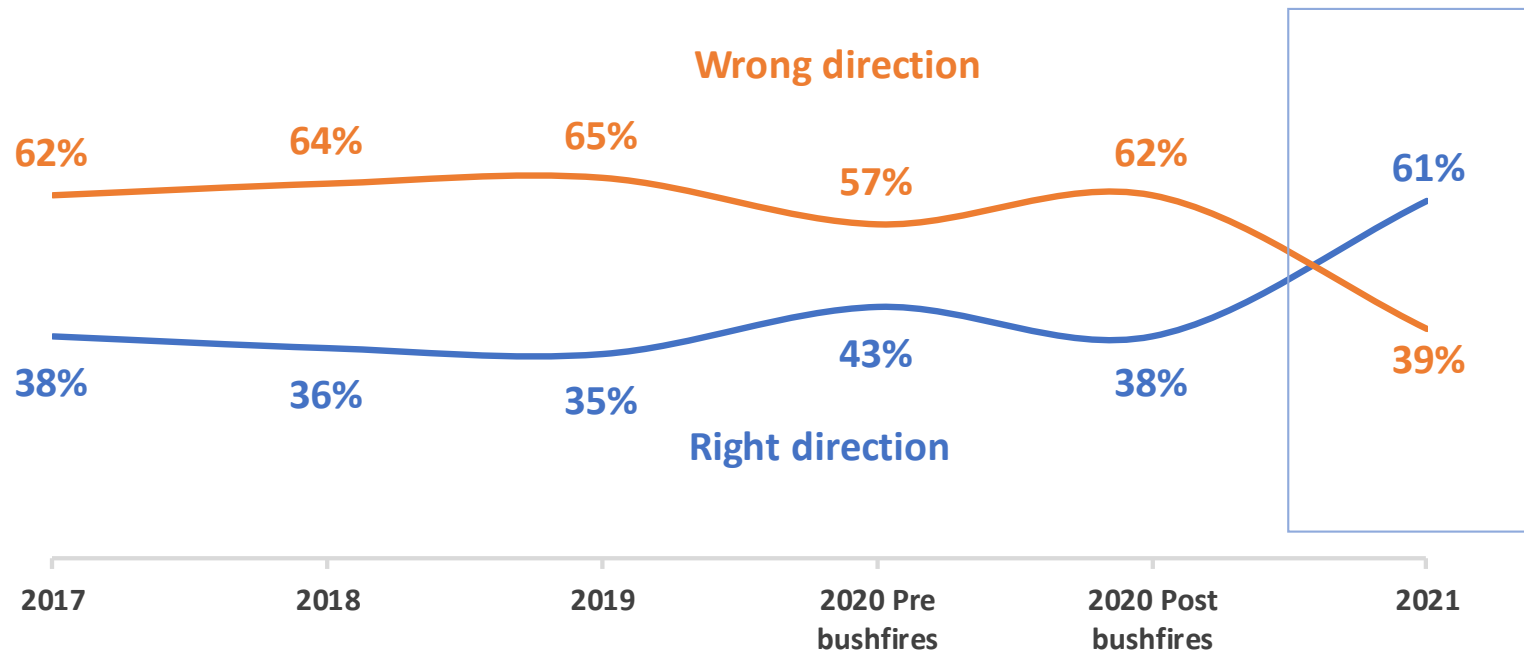
All respondents, n per month: NSW, n=c. 300-1,500; VIC, n=c. 260-1,500; QLD, n=c. 300-1,500; SA, n=c. 160-1,000; WA, n=c. 180-1,200.



# A moment of national pride

AustraliaSCAN

In general, is the country going in the right or wrong direction?



AustraliaSCAN, n=2,000 per year

Collected by Quantum's industry-leading social trends monitor AustraliaSCAN, data going back to 2017 shows just how starkly Australians have reversed their negative perspective on the state of our nation and the direction it's headed.

Reflecting a widespread **sense of pride** in what we have achieved, for the first time since 2017 **a far greater proportion feel that the country is headed in the right direction than the wrong direction.**

**The legacy of this success story will surely affect Australian introspections on our culture and society for many years to come.**

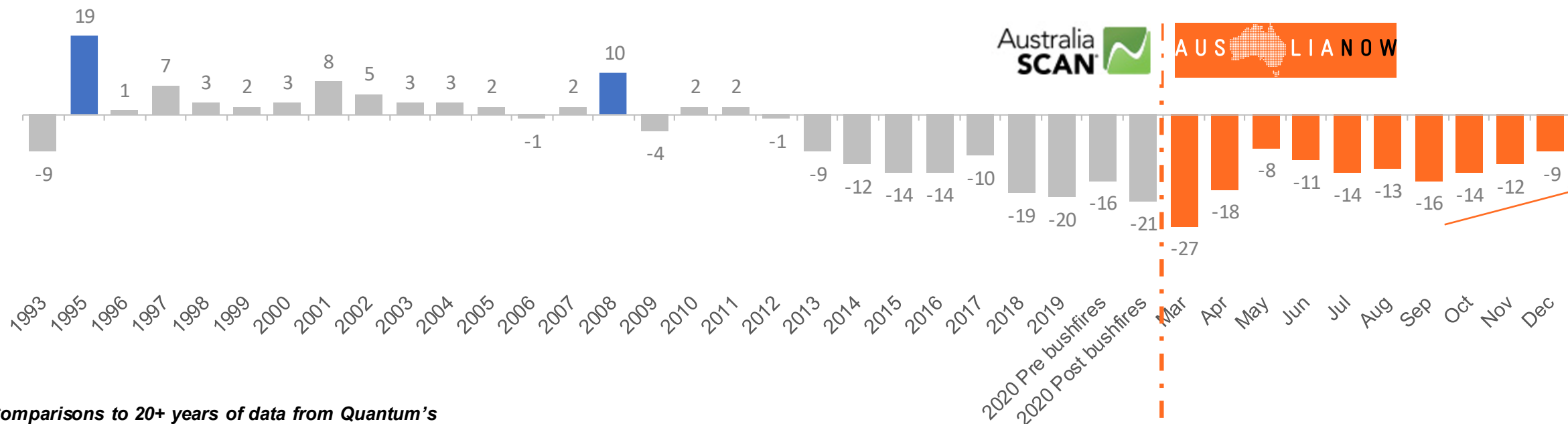
# Financial confidence **building**

AustraliaSCAN  
& Survey

Off the back of **unprecedented Government stimulus**, and a committed approach to suppression of COVID-19, we are heading into the Christmas period with **stronger consumer confidence than observed for many years**.

## Confidence in financial future over next five years

(very confident – not confident)



Comparisons to 20+ years of data from Quantum's proprietary AustraliaSCAN survey

Q13. Which of the following statements best describes how you feel about your ability to meet your financial needs in the next five years?

All respondents, n=c.1,000-6,000 per month

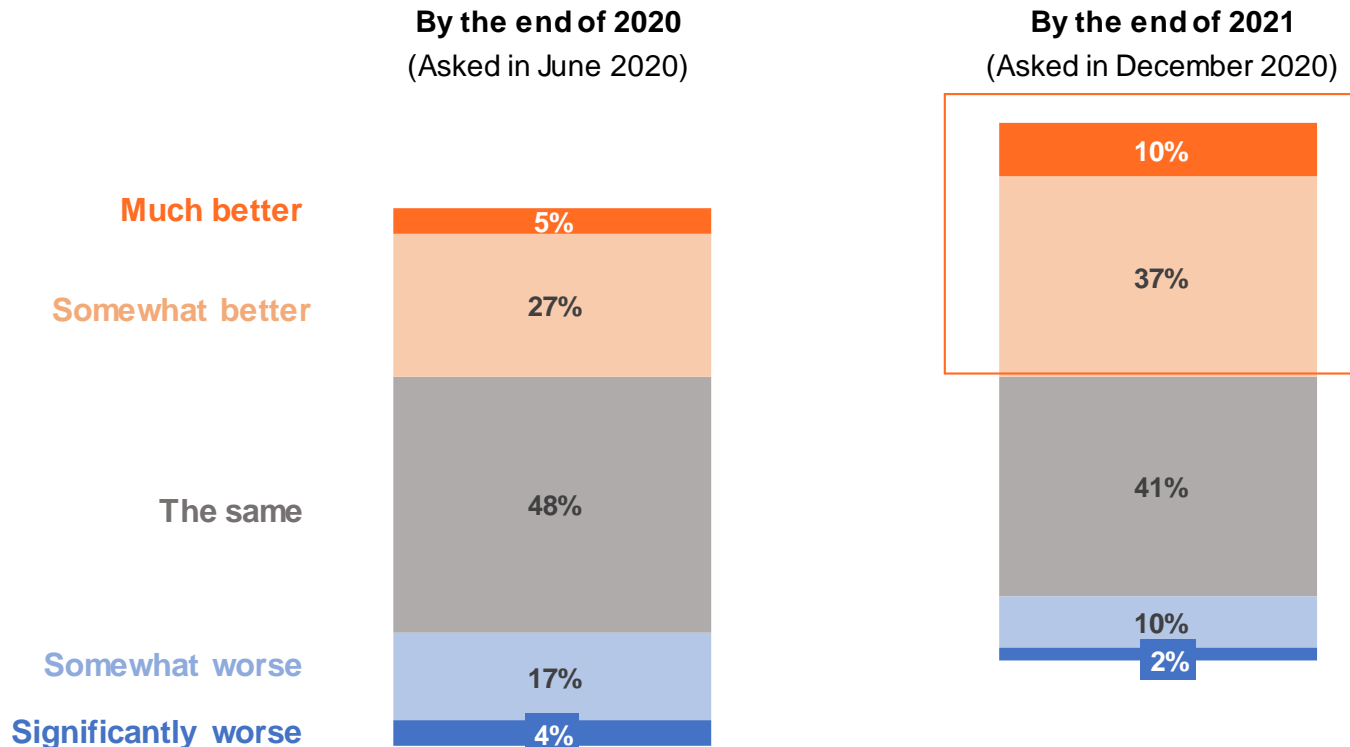
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**HELLO  
2021**

# A more **positive 2021** expected

Survey

## Predicted change in personal circumstances



Consumers predict their confidence will extend well into 2021.

When asked in June how they thought their year would end, only a third (32%) felt their situation would improve.

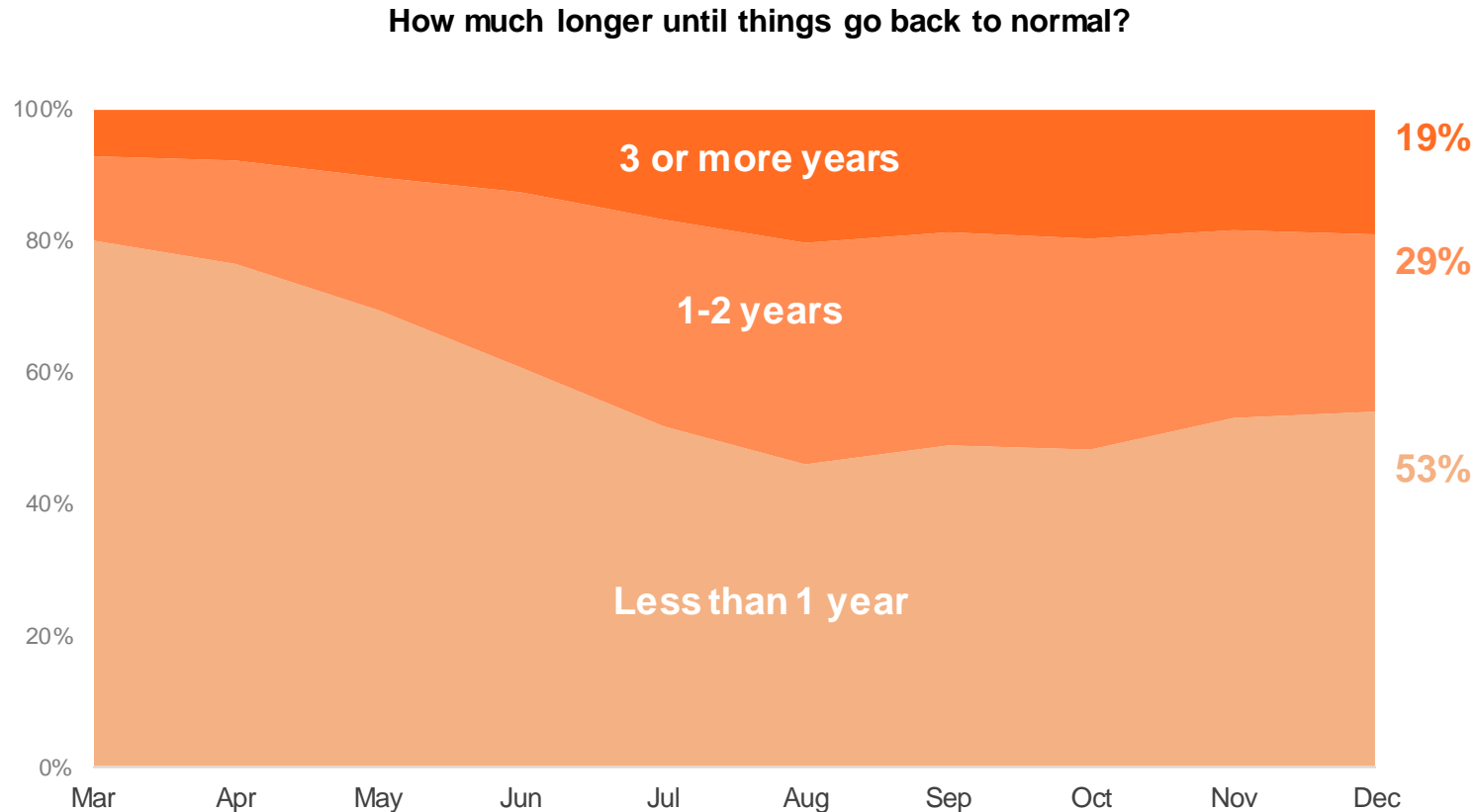
Contrast that to how people feel now, and **almost half (47%) feel that their circumstances will improve in 2021.**

**Younger people (18-29 year olds)**, arguably the most negatively impacted by the pandemic, show particular **confidence that their circumstances will be better in 2021 (58% somewhat / much better).**

Q117 - Compared to today, how do you anticipate your circumstances might change by the end of 2020/2021? Will they be...  
All respondents, W/C 3<sup>rd</sup> December, n=1,001

# But...this is far from over

Survey



What Australians are demonstrating is **guarded optimism**, as we know this is far from over.

Back in March, eight in ten felt confident that we would be back to normal in less than a year. In the following six months, our **timelines slowly pushed out** until only half felt that recovery would be a year away.

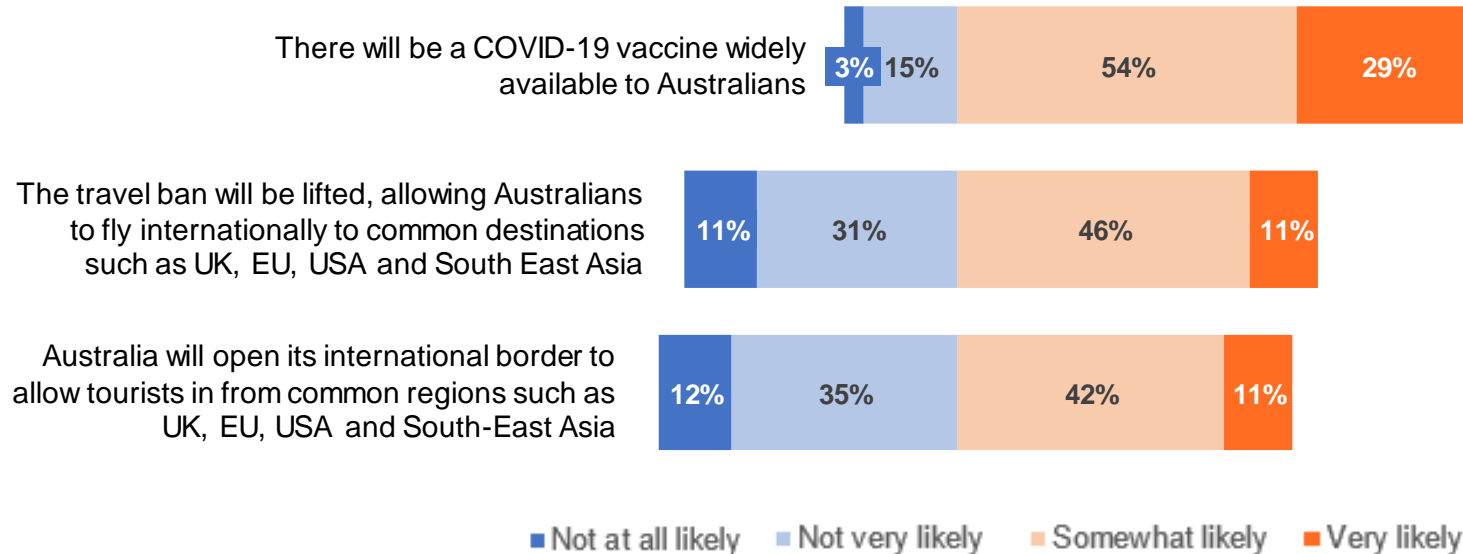
The **possibility of a third wave** is present – 54% are concerned about this. So whilst we are quietly optimistic, we are cautious about the uncertainty that 2021 will hold.

Q11. How much longer do you think it will be until you feel like things will go back to normal in Australia?  
All respondents, n=c.1,500-5,000 per month

# Not much is certain

Survey

## Predictions for Australia in 2021



When asked about what events are likely to play out in 2021, many Australians **are uncertain and don't commit**.

The most certainty was expressed in regards to a **COVID-19 vaccine being widely available** to Australians in 2021, 29% are **very confident** of this.

Confidence in vaccine availability is linked to **optimism for the next 6 months** and represents an important step in **rebuilding confidence on the path to economic recovery**.

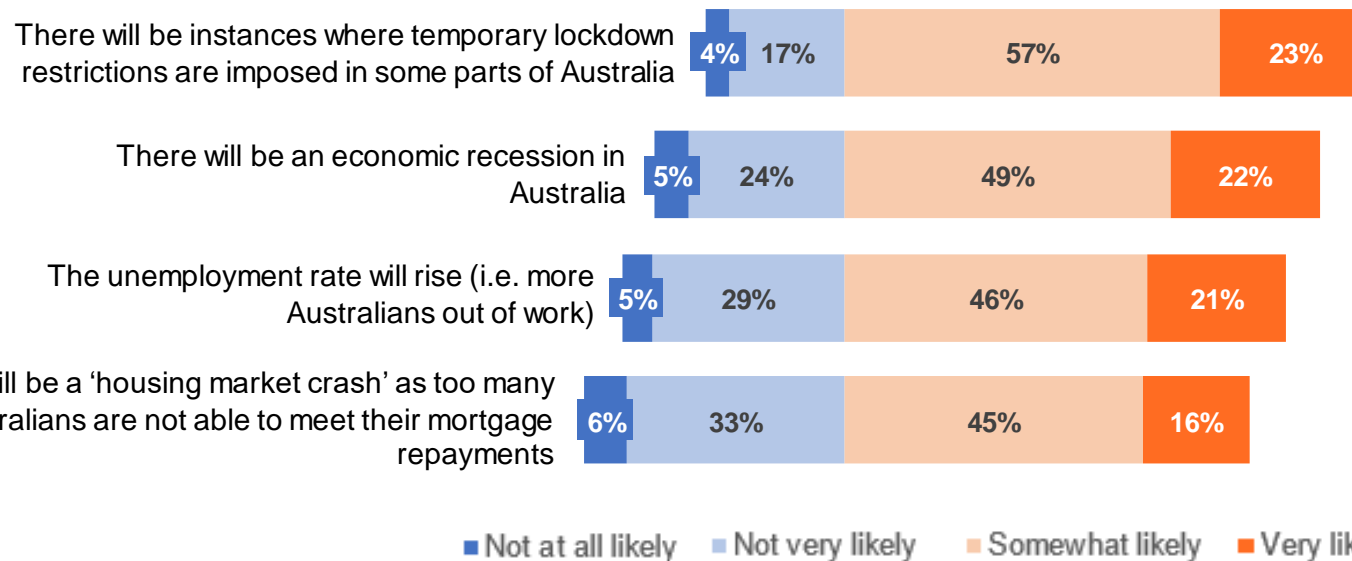
Other events, such as travel bans lifting and international borders opening to tourists, are thought to be less likely. Part of our success is down to our **unique geography** and we know that this will need to be managed carefully when these boundaries are relaxed.

Q117a. Looking ahead to next year (2021), to what extent do you anticipate the following for Australia?  
All respondents, W/C 3<sup>rd</sup> December, n=1,001

# Further outbreaks seen as likely

Survey

## Predictions for Australia in 2021



Australians are **wary of further outbreaks** with 81% feeling these are likely.

Although we are now out of technical recession, there is a reasonably widespread belief that **there are economic risks ahead** and **71% think a recession is likely in Australia in 2021**.

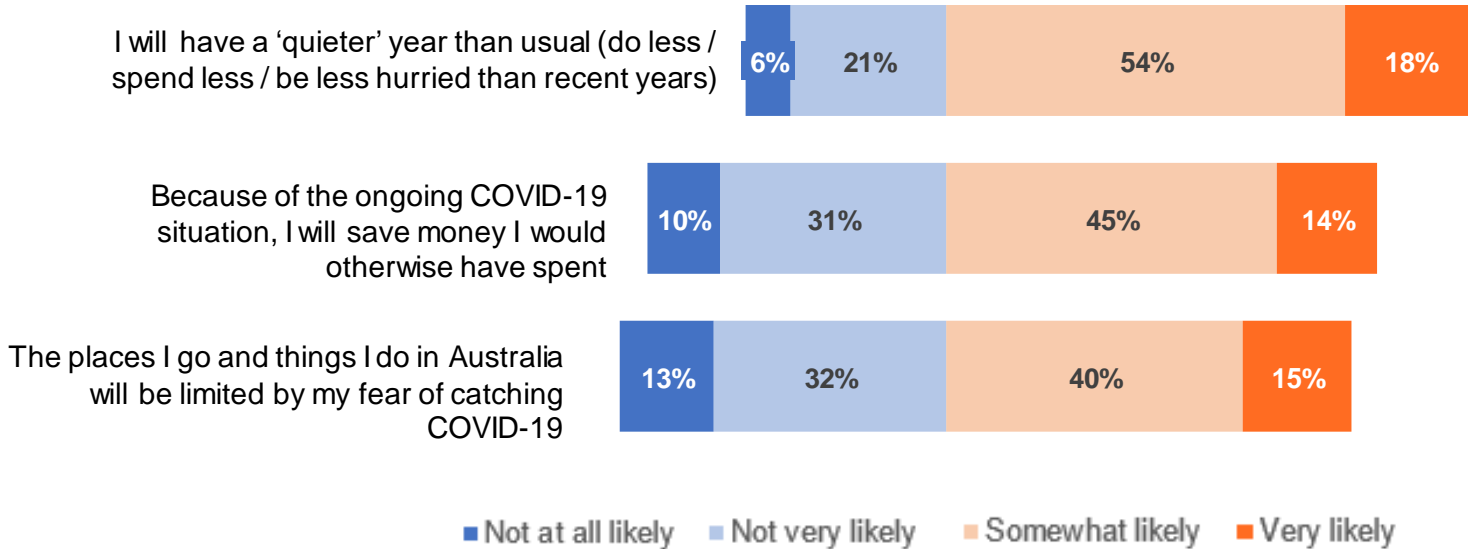
Again, many Australians have **elected to stay neutral**. This indicates **genuine uncertainty** on these bigger questions that will play into how we navigate 2021.

Q117a. Looking ahead to next year (2021), to what extent do you anticipate the following for Australia?  
All respondents, W/C 3<sup>rd</sup> December, n=1,001

# A potentially restrained new year

Survey

## Predictions for me personally in 2021



With the majority of Australians pledging to have a quieter year than usual, save money, and limit travel, 2021 may be the **year of restraint** for many.

The Australian Prudential Regulation Authority<sup>^</sup> revealed last month that households have put away **almost \$119 billion into their savings accounts** over the past year.

Australians have money **available to spend once they are confident enough** the pandemic is waning and they can weather the storm.

Q117b. Looking ahead to next year (2021), to what extent do you anticipate the following for yourself personally?  
All respondents, W/C 3<sup>rd</sup> December, n=1,001

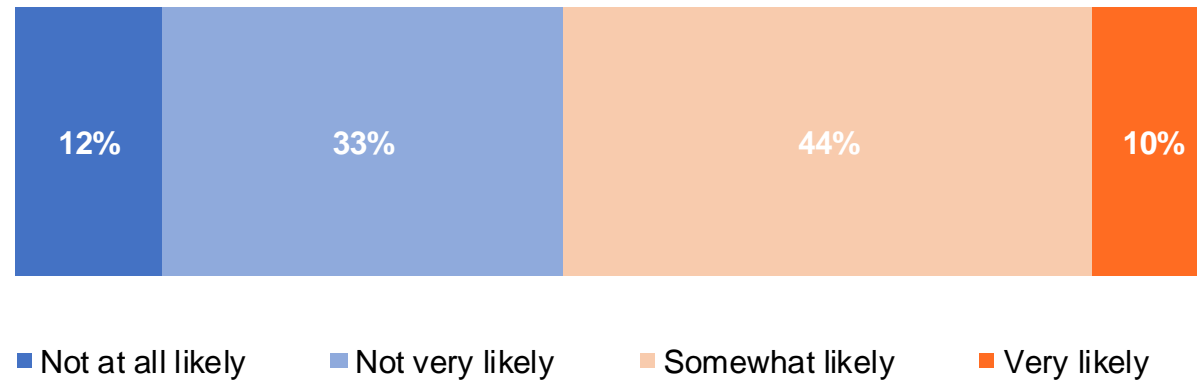
<sup>^</sup>Source: <https://www.smh.com.au/politics/federal/australians-put-their-money-in-the-bank-but-yet-to-spend-it-20201130-p56j54.html>



# How & when **will it end?** **Anyone's guess!**

Survey

**“COVID-19 will be over by the end of 2021 and reflected on as something which ‘happened’ but is no longer ‘happening’”**



Q117a. Looking ahead to next year (2021), to what extent do you anticipate the following for Australia?  
All respondents, W/C 3<sup>rd</sup> December, n=1,001

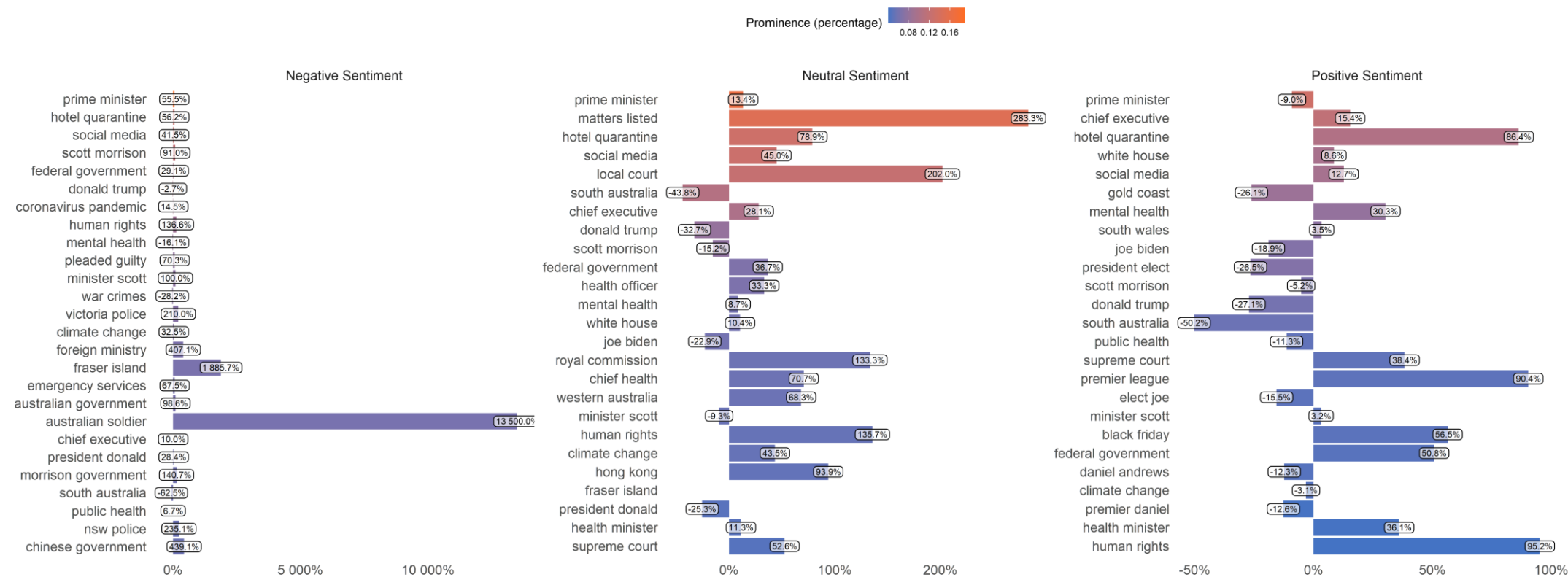
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# CULTURE

# What's big and new in the news?

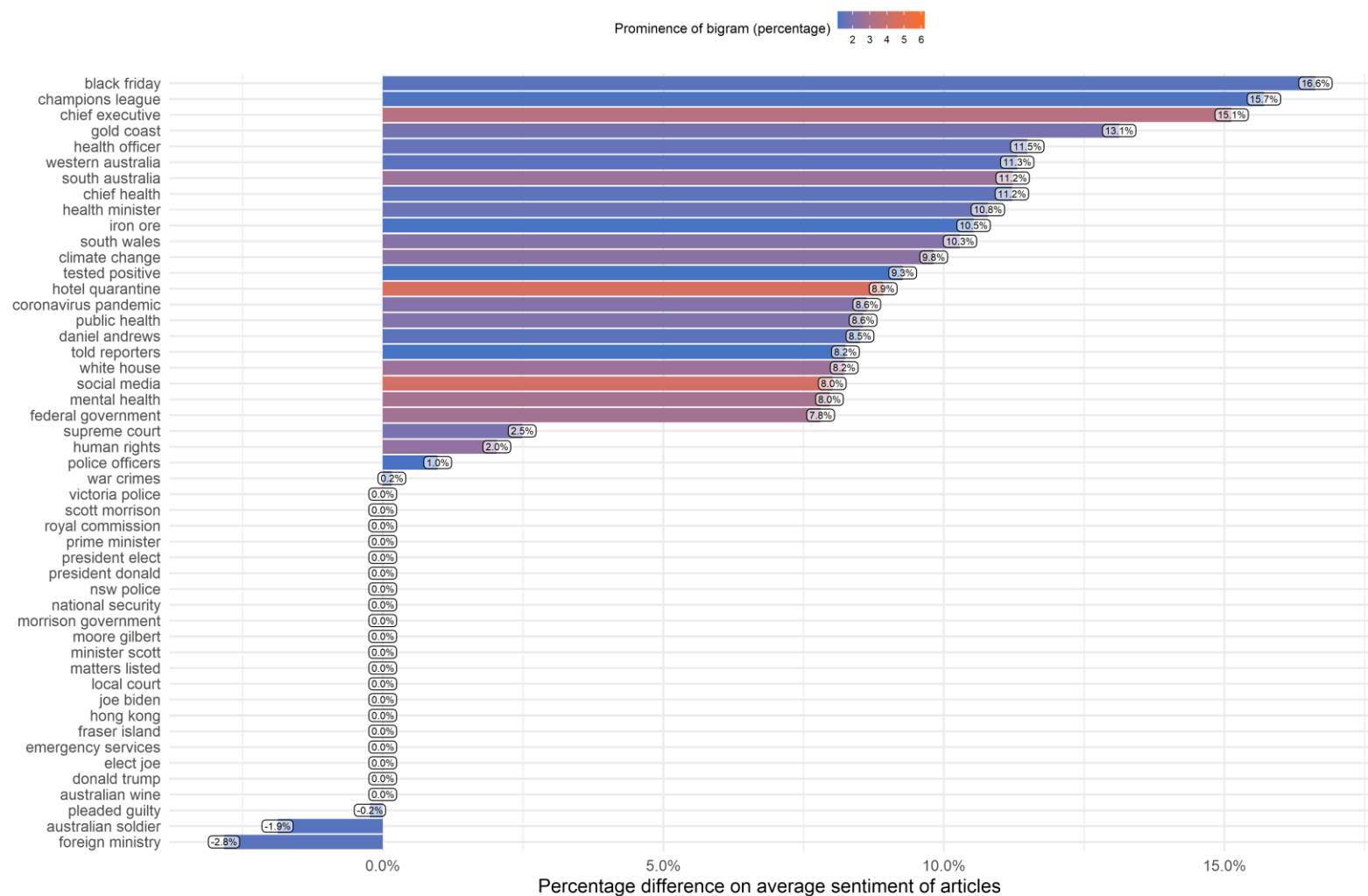
The image put out by the CCP of an Australian soldier got most of the negative coverage, but the news of Fraser Island burning has been consistently bubbling in the negative cycle, too. Hotel quarantine has been a major focus on both the positive/negative front, and the US election is starting to fall out of the regular news cycle.

Prominence and Change; the top 25 bigrams and their rate of change within sentimental groupings.  
These are the most frequent bigrams, ordered on their axis by their prominence over the last two weeks (and represented by their colour).  
The Bar represents their rate of change from two weeks past compared to two weeks previous.



# What's the good and bad news?

Top 50 Bigrams and their relative effect on sentiment change  
Generalised Linear Model outputs. Bigrams with no value are not statistically significant.



Positive news was relatively predictable this week, with a vast array of topics getting positive content.

For the first time since May, Daniel Andrew's got predictably positive coverage – likely in response to the continued easing of restrictions in Victoria.

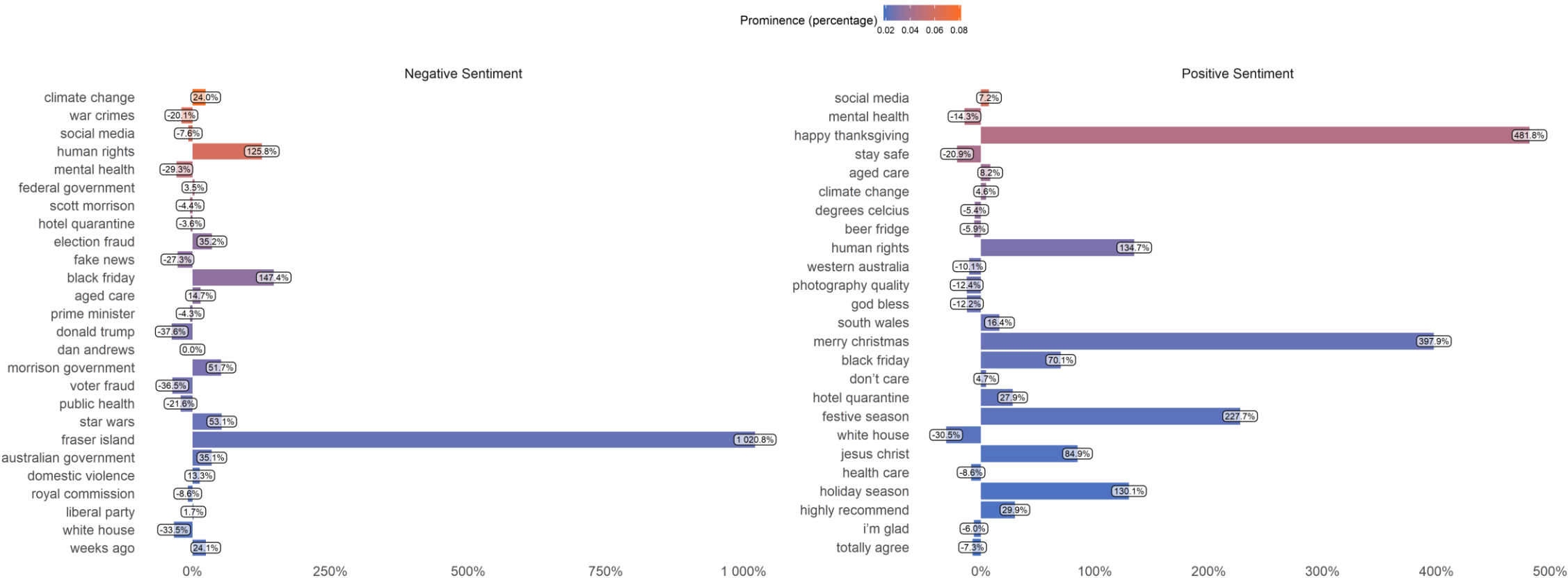
# News – sentiment timeline



# What's big and new in social?

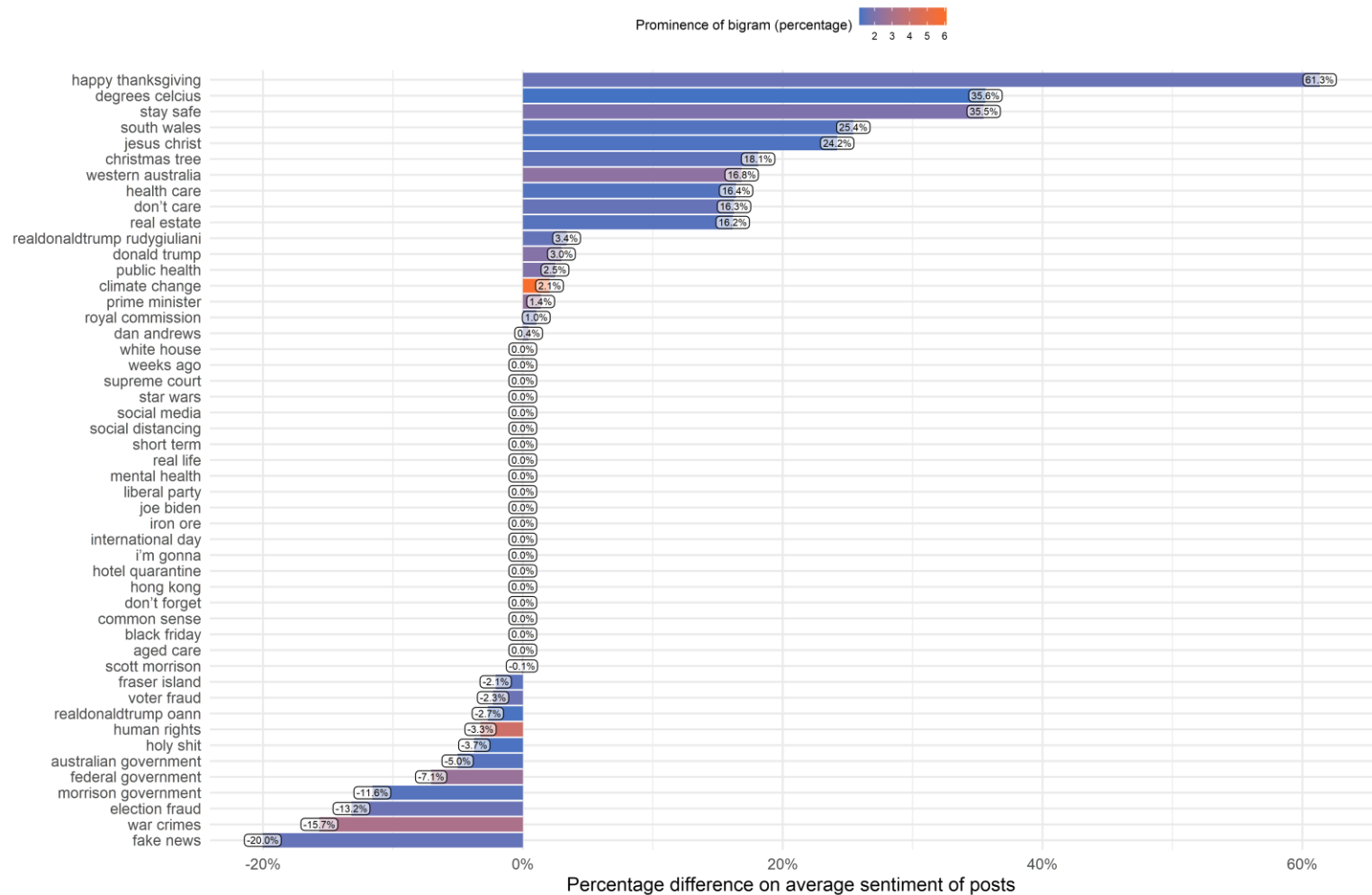
Climate change has swung back in to major focus for social; in part triggered by the devastating Fraser Island fires. In response to the altered images put out by the CCP, many also pointed out human rights abuses. More positively, increased focus on well-wishing for the festive season brought the tone up.

Prominence and Change; the top 25 bigrams and their rate of change within sentimental groupings.  
These are the most frequent bigrams, ordered on their axis by their prominence over the last two weeks (and represented by their colour).  
The Bar represents their rate of change form two weeks past compared to two weeks previous.



# What's good and bad in social?

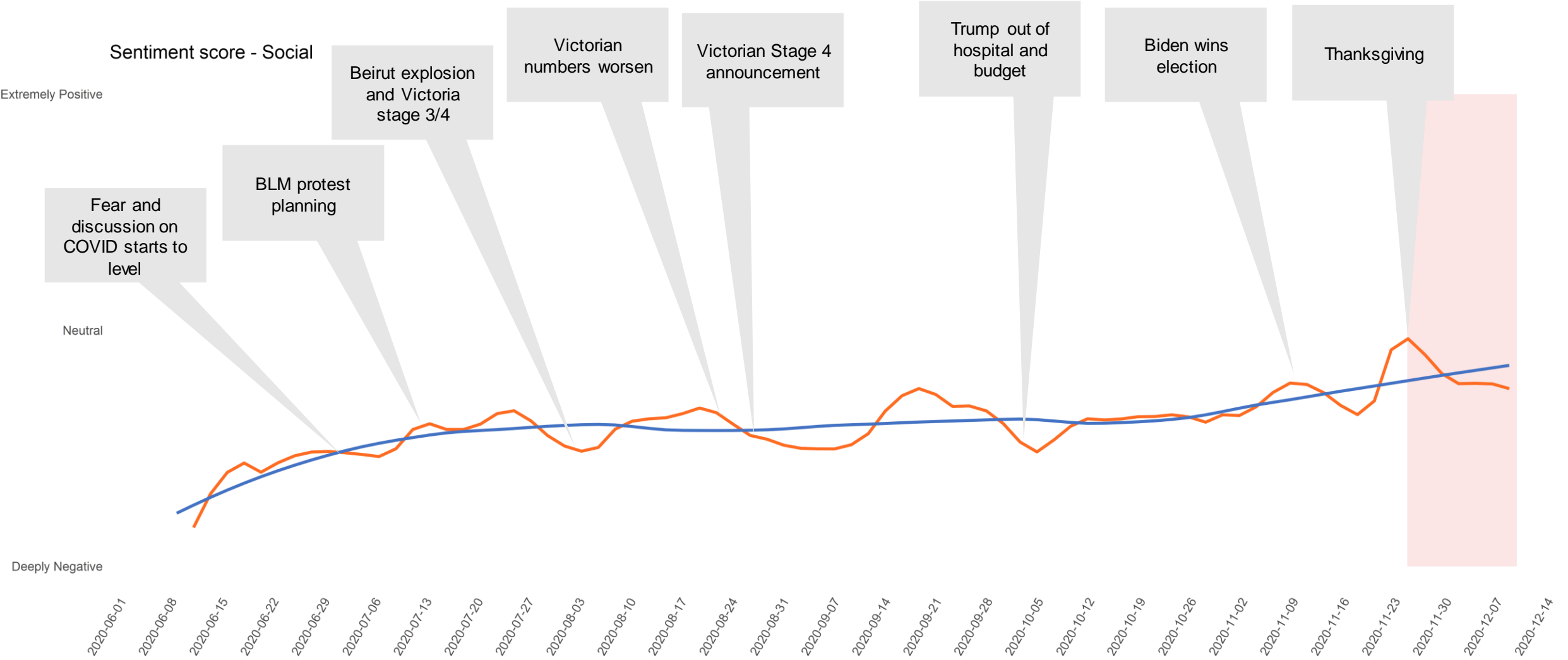
Top 50 Bigrams and their relative effect on sentiment change  
Generalised Linear Model outputs. Bigrams with no value are not statistically significant.



Despite the fact that we only monitor content from Australia, well-wishing for Thanksgiving dominated any positive tone on social.

In Western Australia, someone hooked an external thermometer up to a beer fridge, which regularly reported its temperature. There were many people who had some fun with this, which is why that's so prevalent.

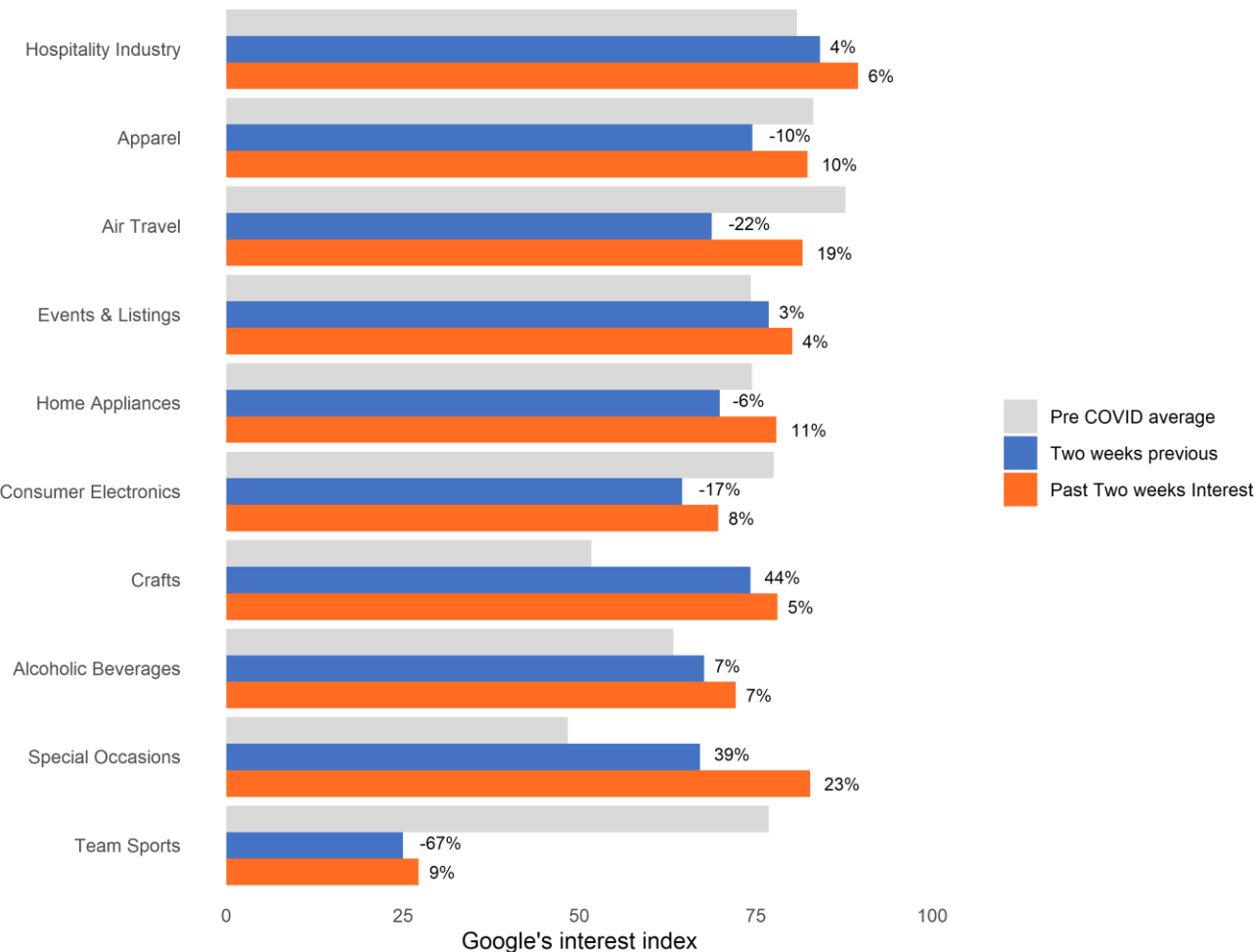
# Social – sentiment timeline





# What's up in search?

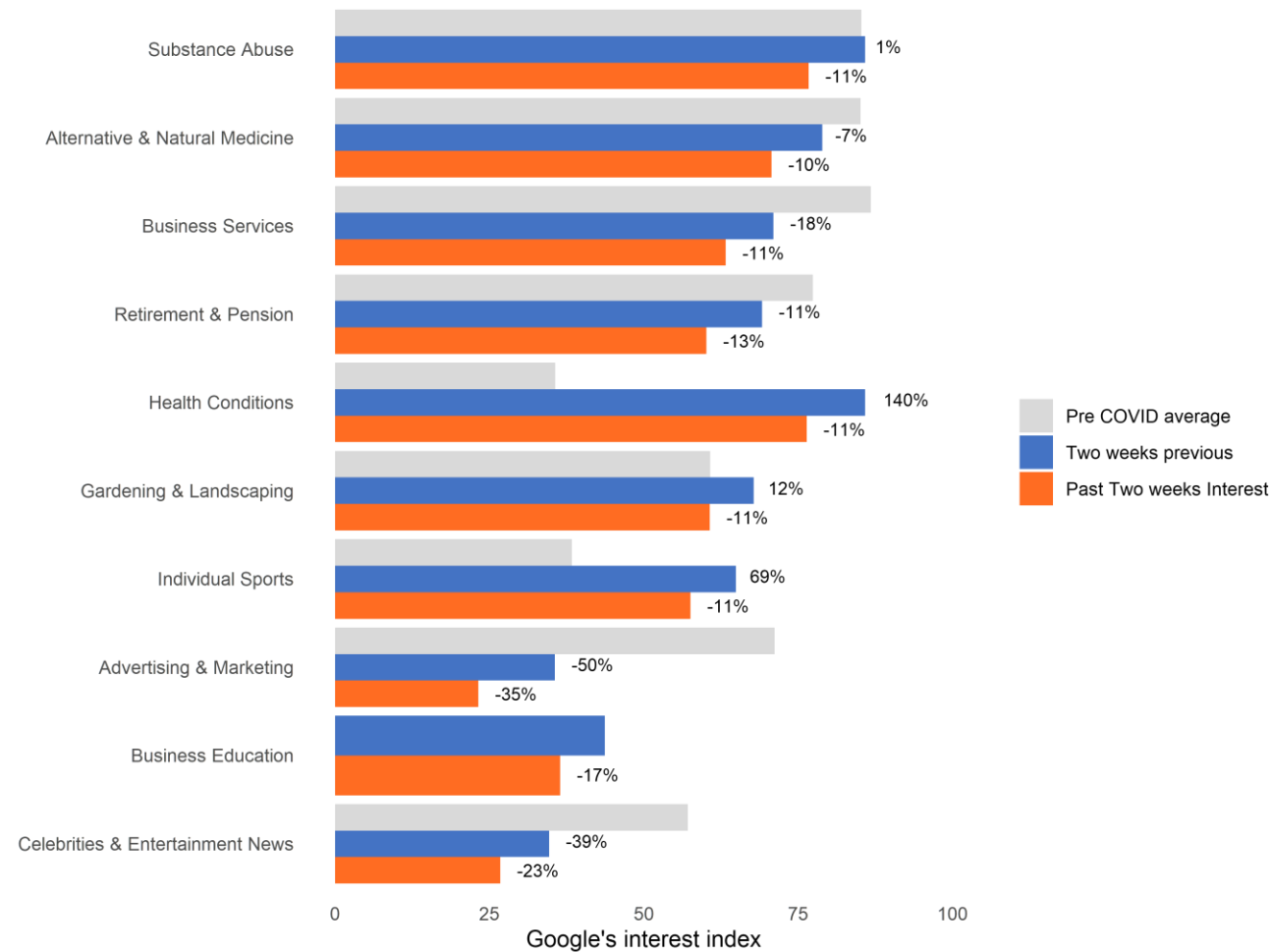
This weeks biggest POSITIVE deviators from the last two weeks.  
Ordered by their general interest on Google, and their % change labelled.  
64 categories are monitored weekly.



Christmas is kicking in to full swing, with all the things we associate with the holiday season having their searches increased; fun, travel, and shopping.

# What's down in search?

This weeks biggest NEGATIVE deviators from the last two weeks.  
Ordered by their general interest on Google, and their % change labelled.  
64 categories are monitored weekly.



For the first time in a long time, the ‘health conditions’ category has dropped. This includes searches for COVID. It looks like people are starting to let it go and get back to normal.

Celebrities and entertainment news being down is, primarily, driven by Trump falling out of the search cycle.

# AUS LIA NOW

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**A sincere thank-you to all our readers.**

**This has been a challenging year and your input and support has been hugely important to keeping this initiative going.**

**We're delighted many of you have found AustraliaNOW so valuable and have leveraged it in your work.**

**Because of this we will be continuing AustraliaNOW into 2021. How & when will it end? Anyone's guess.**

**Expect the next report to hit your desk in late January.**

**We wish you a very Merry Christmas and a prosperous New Year.**