

AUS LIANOW

Report: 5 March 2021

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 2020
- **This report draws from over 51,000 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: 26th March 2020 – 1st March 2021

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.

This month in summary

February 2021

MINDSET

As Australia moves from crisis mode into **COVID management mode**, our attention has shifted from pandemic-related concerns (e.g. healthcare, economy and unemployment) back to broader issues such as the environment and housing affordability. On the personal front, Australians also report a shift in focus. Stability is sought as we **focus on the fundamentals** – family and finances at the cost of **fun/adventure and travel** being on hold. There is renewed energy about valuing the simple things in life, with Australians expressing a desire to maintain the ‘silver linings’ of a disrupted 2020.

MIGRATION

Regional areas are set to gain from this shift in focus, with as many as one in ten Australians indicating they have relocated to a regional area in the past year, and a further quarter suggesting they are interested in doing the same. In moving, Australians are looking to fulfill these **fundamental needs** with the key drivers of relocation being an expected improvement in cost-of-living and quality of life.

CONFIDENCE & LEADERSHIP

Australian's confidence regarding their financial future over next five years is optimistic. However, volatility is evident.

On the leadership front, **confidence in State government has largely been bolstered**, with WA on a high coming into state elections and Victoria experiencing a dip following a snap lockdown over February. Federal leadership confidence has softened over the last month following a number of high profile issues. **Declining confidence in the welfare system** is observed as we approach the end of the JobKeeper initiative, amid calls for it to be extended for certain industries.

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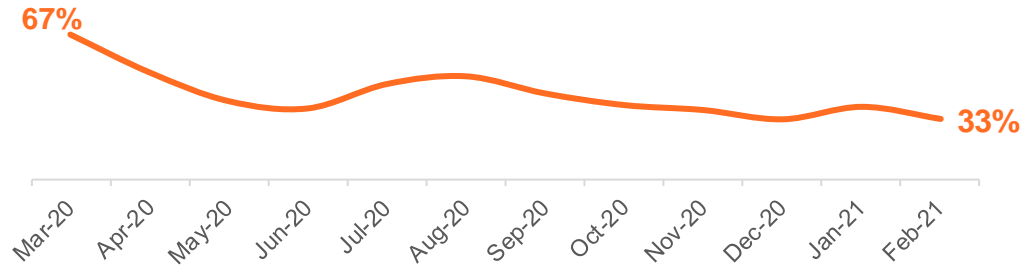
MINDSET

A shift in focus to broader issues

Survey

Overall concern about the COVID-19 situation

(% very/extremely concerned)

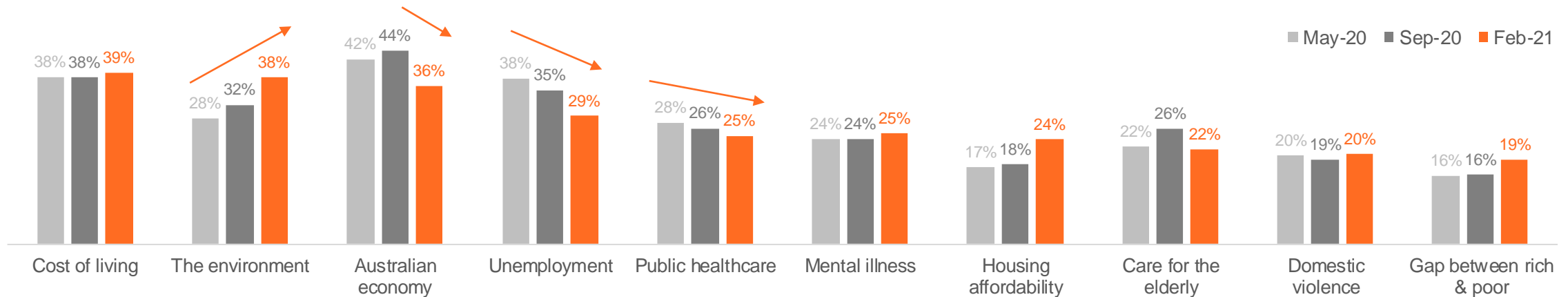


As Australia moves from **crisis mode** into **COVID management mode**, our attention has shifted from pandemic-related concerns (e.g. healthcare, economy and unemployment) back to broader issues such as the **environment and housing affordability**.

Cost of living, which affects the day-to-day lives of many Australians, remains high on the agenda.

Most important things for government to take action on straight away

(Top 10)



Q8 - Firstly, how concerned are you about the Coronavirus/Covid-19 situation in general?

Q16a - Which of these do you believe are the five (5) most important things for government to take action on straight away?

All respondents, n=c. 1,000-7,300 per month.

Unique generational concerns

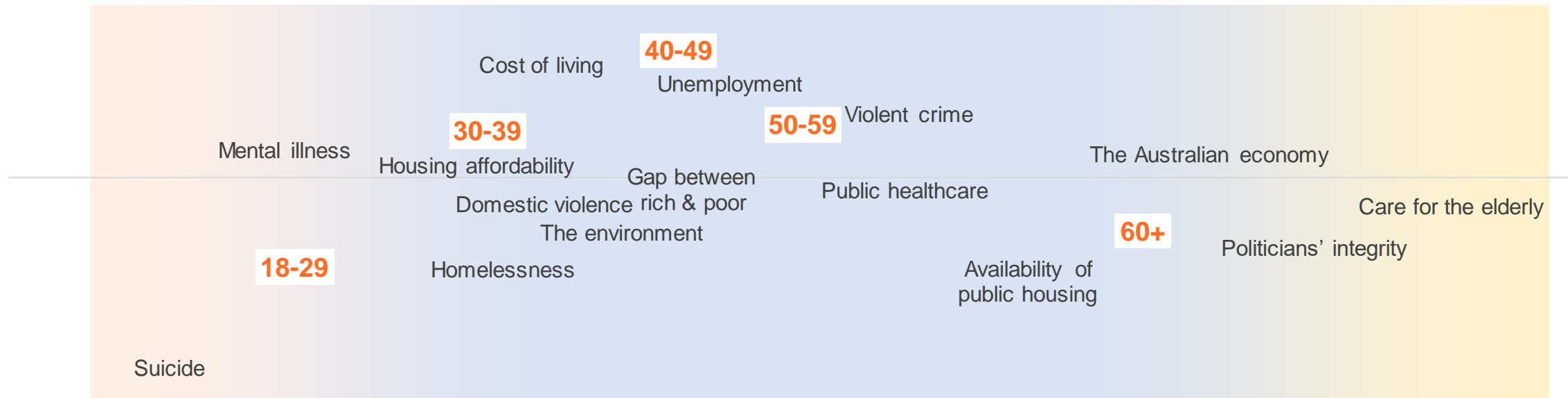
Survey

Beyond COVID, there are nuances in **how each generation views the key priorities for government**. Suicide and mental health are high on the agenda for younger people. At the other end, the economy is a key issue for Australians aged 60+.

Most important things for government to take action on straight away –

By age

(Correspondence Map – Top 15)



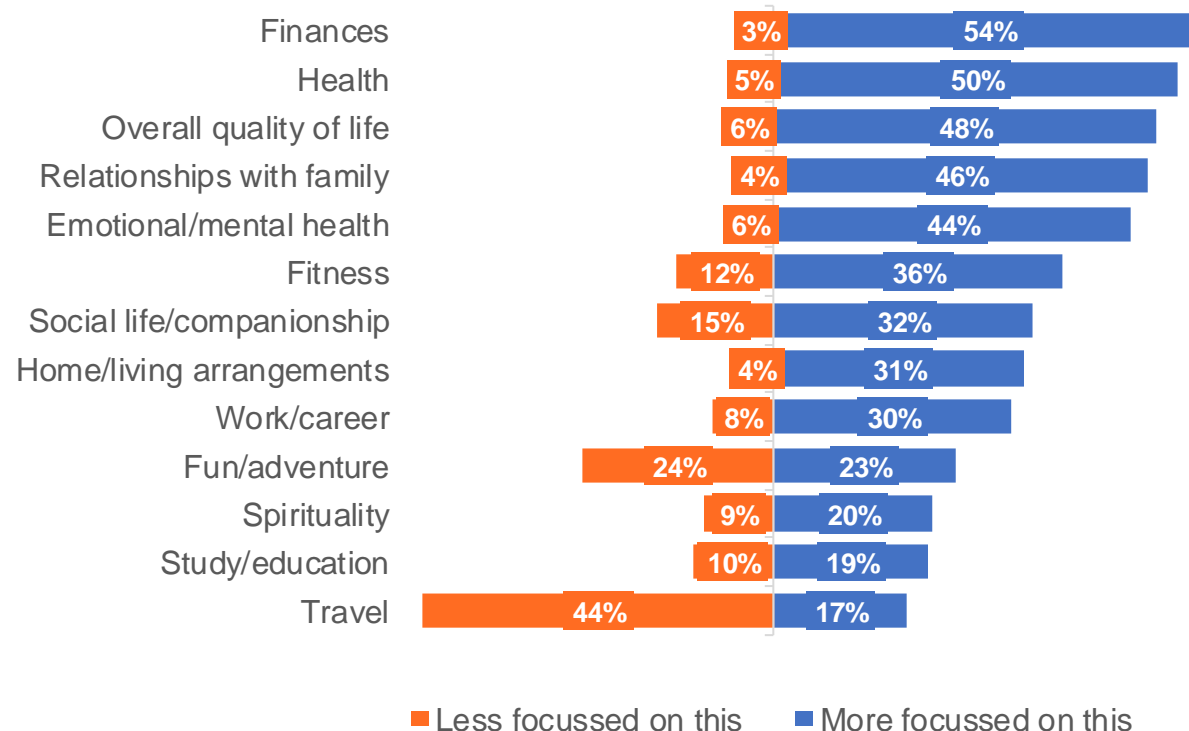
Q16a - Which of these do you believe are the five (5) most important things for government to take action on straight away?

All respondents, February, n=2,002

Personal priorities have shifted

Survey

Change in focus compared to prior to the pandemic



On a personal level, the pandemic has affected Australians deeply. Whilst COVID-19 has ruptured our lives as we knew them, it has also been **transformational** in the sense that it has forced us to adapt to a new way of thinking.

Prompted initially by restrictions to movement, and compounded by ongoing feelings of uncertainty, Australians **have re-focused on the fundamentals** – family, financial and physical health. This has **come at a cost to travel and fun/adventure**, which is likely to be on hold for the foreseeable future.

Interestingly, it is the **younger generations** and **those struggling the most financially** that are most likely to indicate a shift in focus.

Q22a - Have any of the following areas of your life changed (in terms of where you direct your focus) compared to prior to the pandemic?

All respondents, W/C 25th February, n=1,001

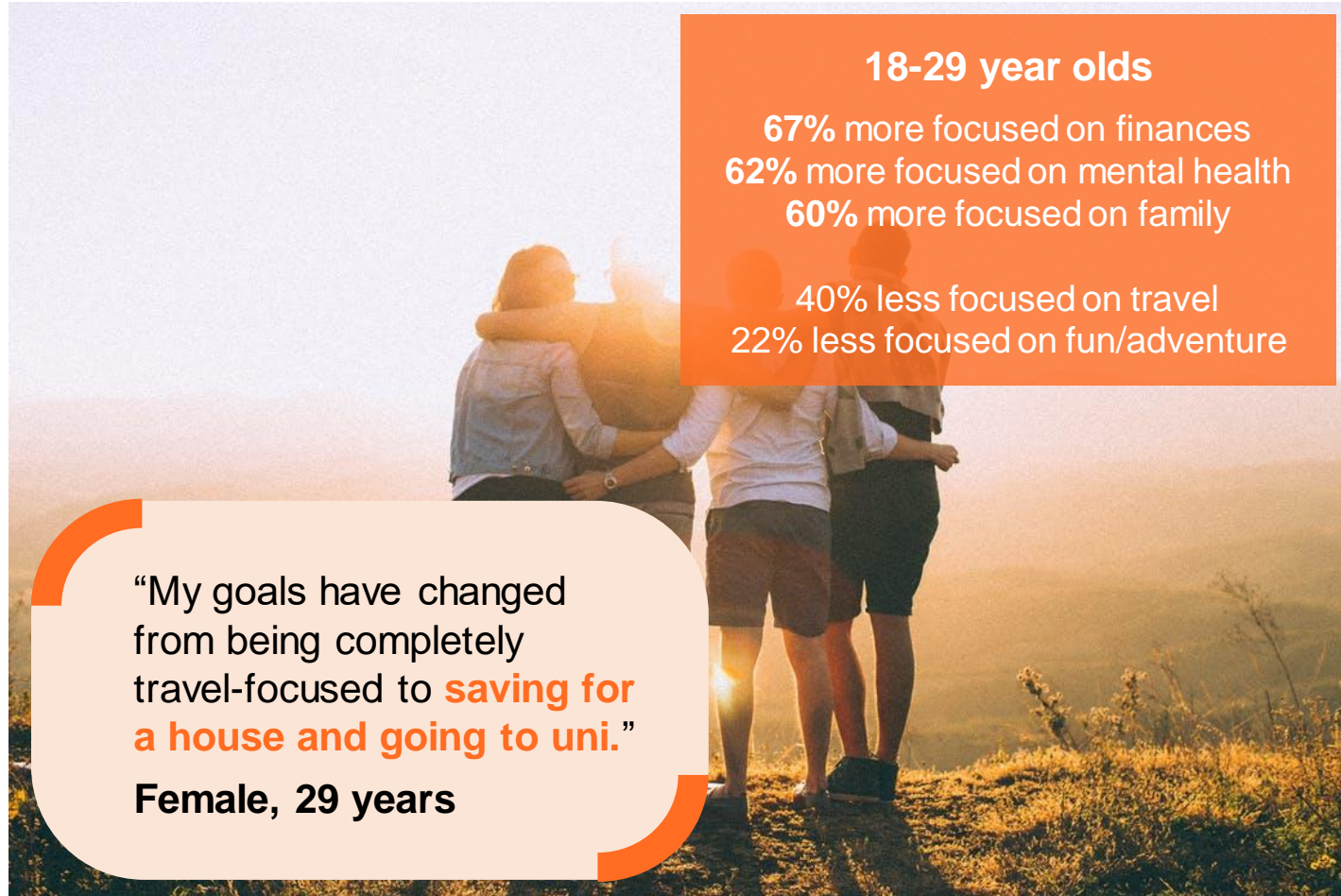
“Being mentally and emotionally stable is the richest quality in a person. I strongly believe that **before this pandemic we didn’t value everything in our lives as much as we do now**, such as our freedom, family, day care, schools, health system and governments.”

Female, 23 years



Young **aspirations** redirected

Survey



With travel and mobility restricted, young people have become decidedly **more pragmatic** in their focus and aspirations. Focusing on work, finances and mental health fulfils the desire for stability and control in a world that is endlessly uncertain.

For this generation in particular (and as other world events have done for generations past), COVID-19 is likely to leave a lasting impact and fundamentally **shift the way they view the world** – even once travel becomes possible again.

Q22b - Could you please provide details on how your focus has changed (including any goals or ambitions) since before the pandemic and why?
All respondents, W/C 25th February, n=1,001

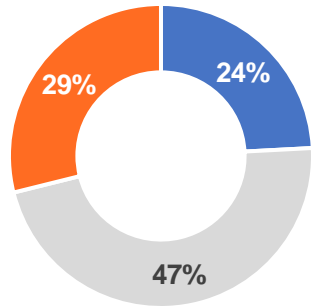
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MIGRATION

Rethinking “home”

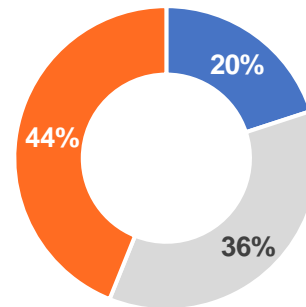
Survey

The pandemic has caused me to
reassess what I value in a home



■ Agree ■ Neutral ■ Disagree

The pandemic has caused me to
reassess where I want to live



■ Agree ■ Neutral ■ Disagree

For around one in five Australians, the pandemic has prompted a **reassessment of where they want to live**, and what they value in a home. This is particularly the case for young urban families and full-time workers for whom possibilities have been opened up due to work-from-home arrangements.

“Plan to **move out of metropolitan Sydney** as we realised we do not want to raise our son in this environment.”

Female, 34 years



More likely to agree:

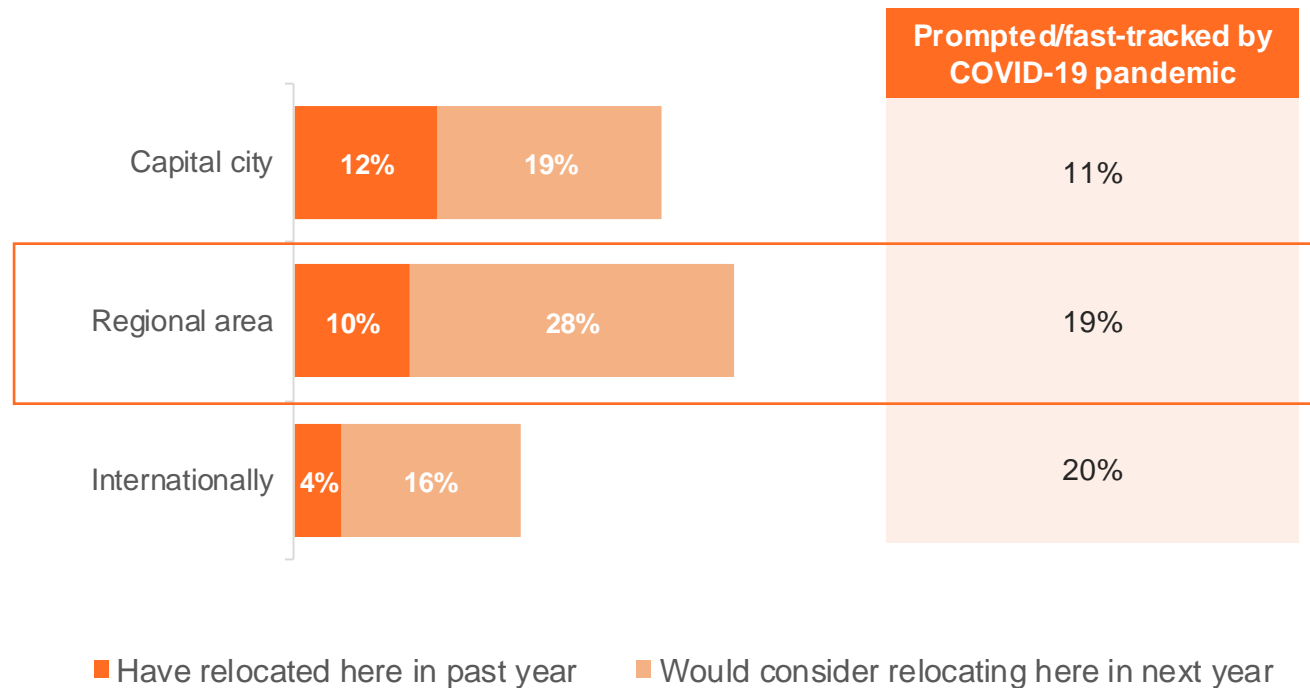
- 30-39 years
- Metropolitan residents
- Full-time workers
- Young families
- Higher household income (\$100K+)

Q.190. To what extent do you agree or disagree with the following statements?
All respondents, W/C 11th February, n=1,001

Regional gains

Survey

Have you relocated to a different area than you currently live in the past year, or would you consider doing so in the next year?



The shift in priorities may be **a boon to regional Australia**.

As many as one in ten Australians have indicated that they have **relocated to a regional area** in the past year, and over a quarter are interested in doing so.

Having faced drought, then fire and most recently the crippling effects of a travel-inhibiting global pandemic, internal migration could **reinvigorate the regions**.

Q.186. Have you relocated to a different area than you currently live in the past year, or would you consider doing so in the next year?

Q.187. Has the pandemic impacted any plans you may have had to relocate to any of the following areas?

All respondents, W/C 11th February, n=1,001

Younger families attracted to regions

Survey

38% of Australians already have or would consider relocating to a **regional area** in the next year



They are **more likely to be...**

- Male (45% have/would consider relocating to a regional area)
- 18-29 (48%); 30-39 (52%)
- Full time workers (49%)
- Families with primary or secondary school aged children (49%)
- Those with higher household incomes - \$100K+ (44%)
- Renters (46%)

Almost **two in five Australians (38%)** have either moved to a regional area in the past year or would consider doing so in the next year.

Migration brings with it **demand for services** and a **shift in where money is spent**.

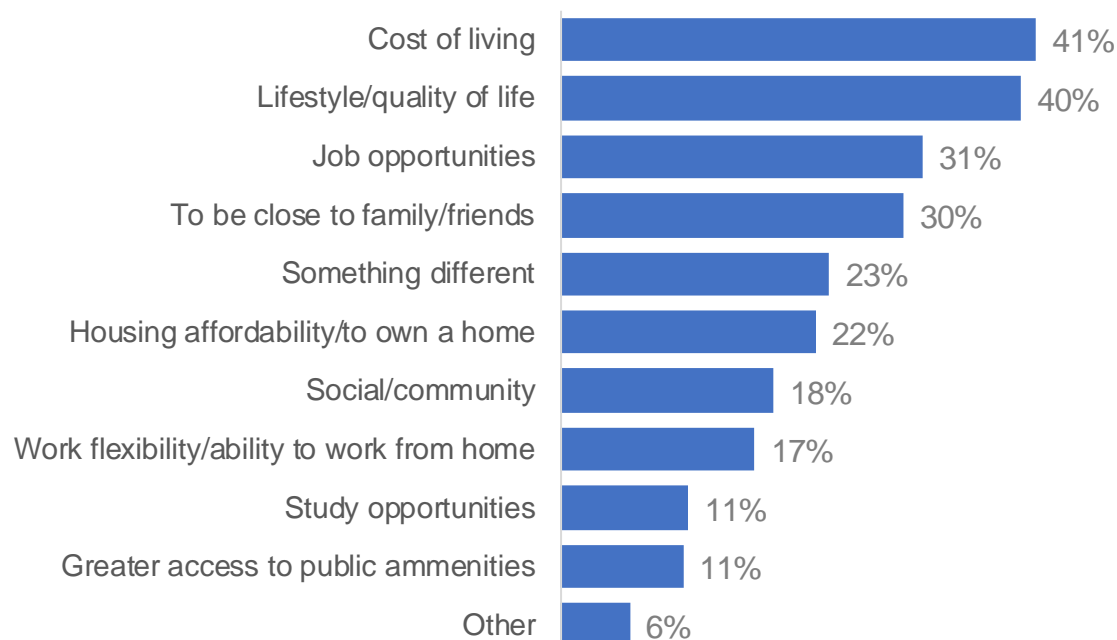
With young families attracted to the regions **schools and education services will see increased demand**.

Q.186. Have you relocated to a different area than you currently live in the past year, or would you consider doing so in the next year?
Have or would consider relocating to a regional area, n=387

Cost of living driving relocation

Survey

Drivers of relocation



Capital city	Regional area
43%	41%
38%	41%
35%	28%
30%	28%
24%	26%
23%	22%
21%	19%
22%	17%
13%	11%
15%	11%
4%	6%

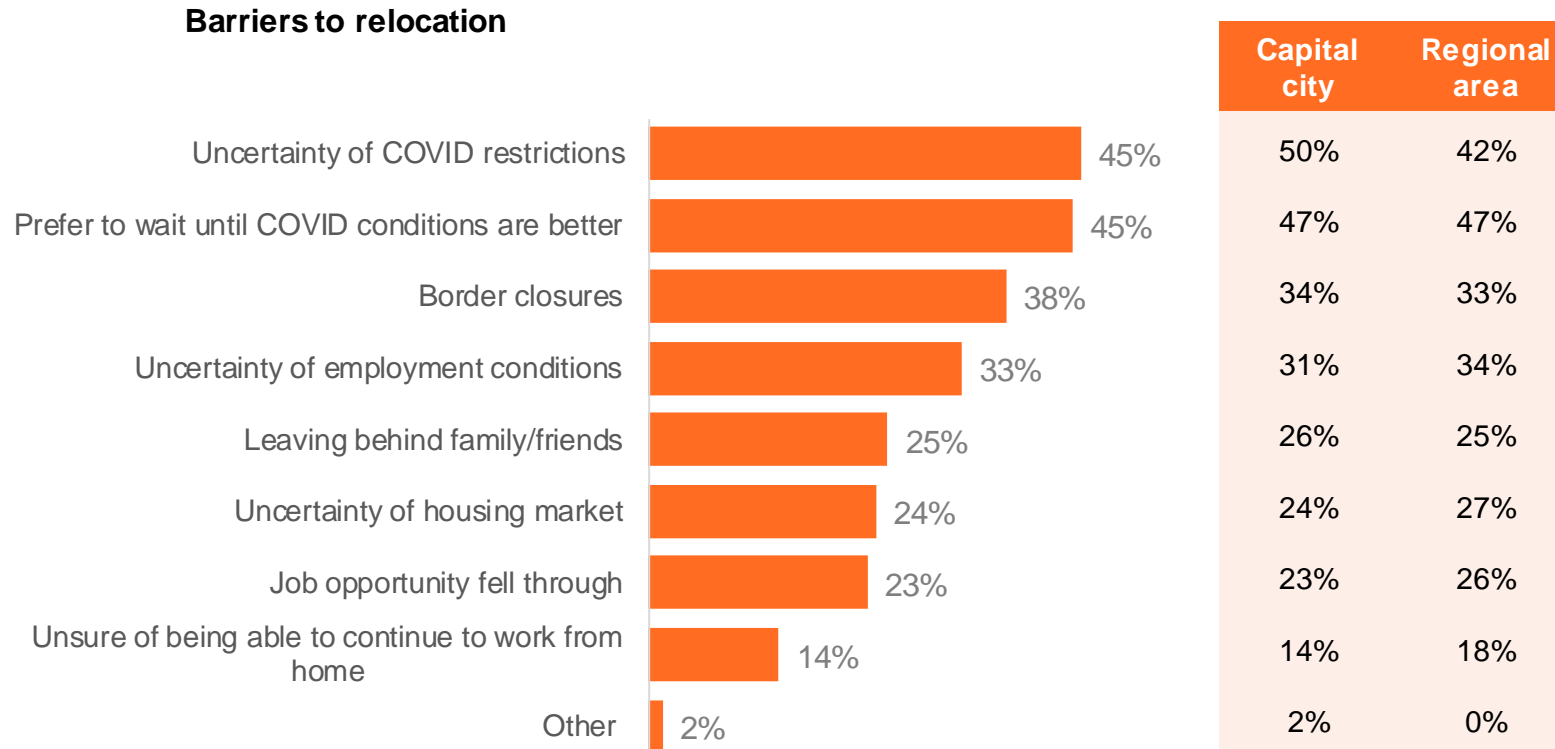
The main driver to relocation is the **expectation of cost-of-living improvements and improved lifestyle/quality of life**. This is a hope for both a move to a capital city or the regions.

Paradoxically, **an increase in demand in regional areas has led to an increase in house prices**. Latest data from CoreLogic suggests that while capital city prices are still down on pre-COVID levels (by 0.2 per cent), regional home prices jumped 6.5 per cent.

Q.188. Which of the following factors have contributed to you considering, or deciding to, relocate?

Have/would consider relocating, W/C 11th February, n=520. Capital city n=322; Regional n=390. ^Source: <https://www.abc.net.au/news/2021-02-01/home-prices-return-to-record-highs-as-covid-rally-continues/13108044>

COVID restrictions delay plans to relocate Survey



For the one in five Australians that have delayed relocating, the **uncertainty around restrictions and border closures** have put a halt to plans. Uncertainty around restrictions has been a particular barrier to capital city migration.

Uncertainty of employment conditions as a barrier to relocation is particularly high for the **younger cohort** (18-29 years; 41%).

Q.189. Which of the following factors have contributed to you being less likely, or cancelling your plans, to relocate?

Less likely/cancelled relocation plans, W/C 11th February, n=212. Less likely to consider a capital city, n=110; Less likely to consider a regional area, n=110

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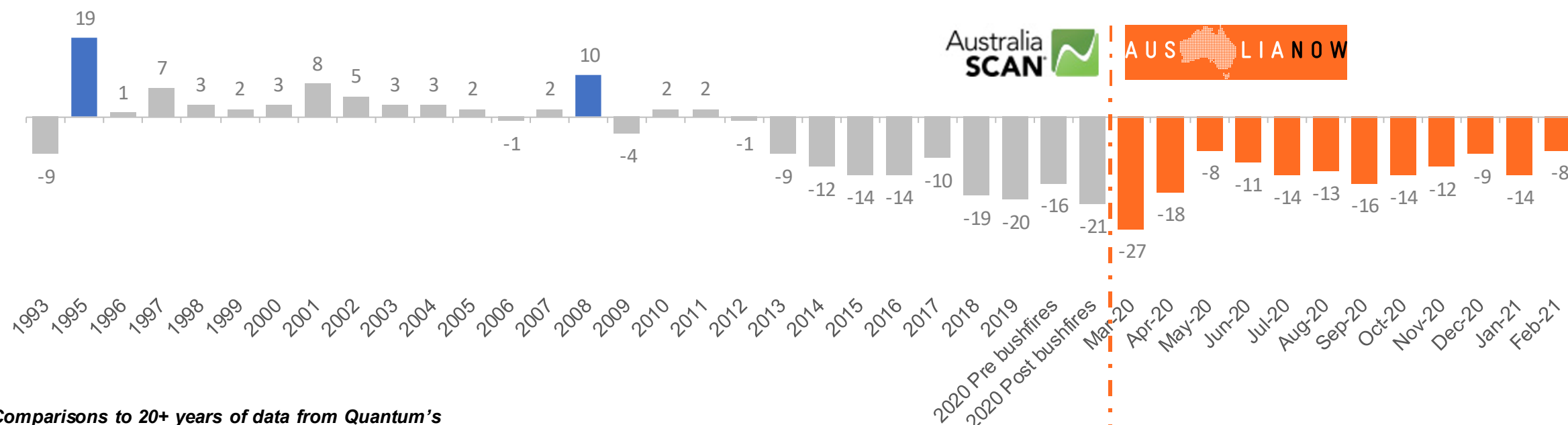
CONFIDENCE & LEADERSHIP

Optimistic financial mindset

February has seen a **slight rebound in financial confidence**, and we are **largely optimistic** about our financial future.

Confidence in financial future over next five years

(very confident – not confident)



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

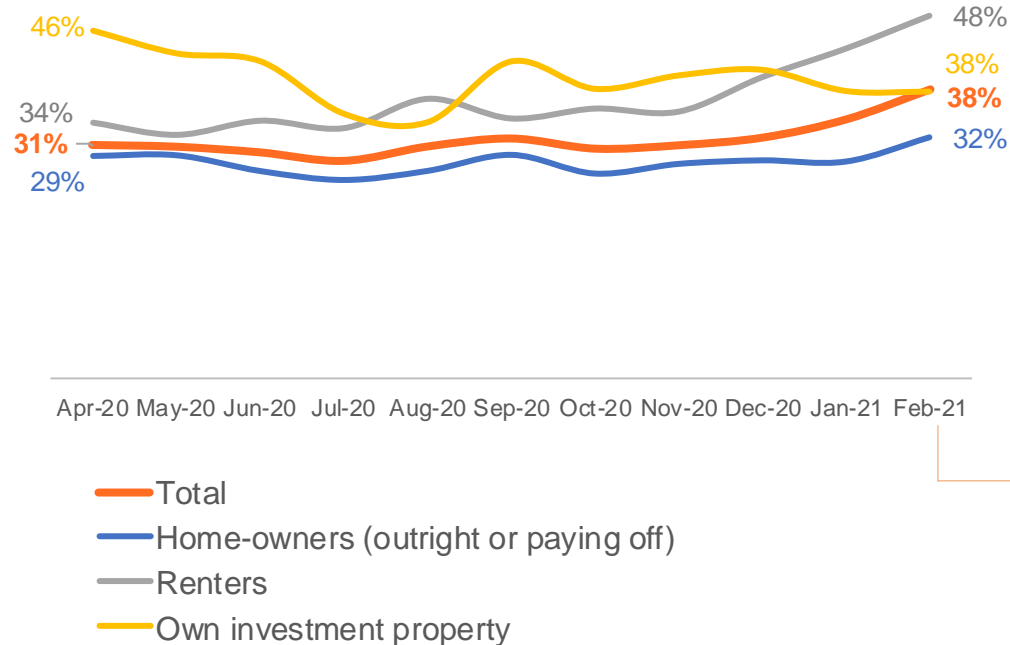
Q13. Which of the following statements best describes how you feel about your ability to meet your financial needs in the next five years?

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

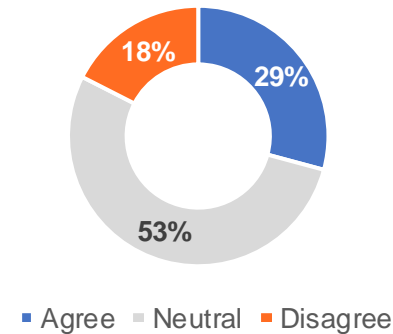
Concern about house prices

Survey

Concern about impact of COVID-19 on house prices
(% very/extremely concerned)

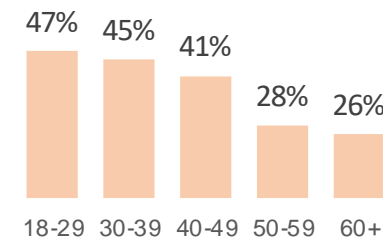


The housing market is more uncertain
as a result of the pandemic



Concern about the **impact of the pandemic on house prices** has increased over January and February. This is seen largely among those who are yet to enter the market (younger people, **potential future homebuyers**) who are worried about reports of increasing house prices.

Concern by age (Feb)



Almost three in ten Australians (29%) feel that the **housing market is more uncertain** as a result of the pandemic, further contributing to concerns.

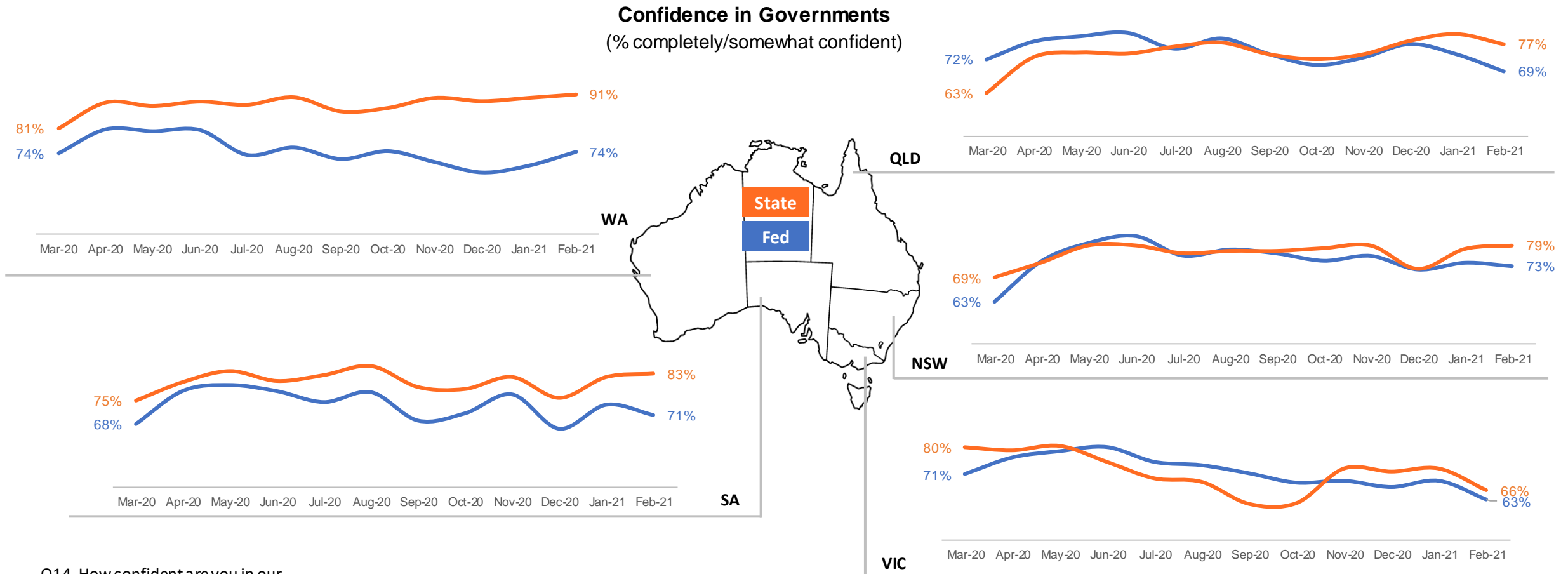
Q9 - How concerned are you about the impact Coronavirus/Covid-19 will have on the following:
All respondents, n=c. 1,000-7,300 per month.

Q.190. To what extent do you agree or disagree with the following statements? The housing market is more uncertain as a result of the pandemic. All respondents, W/C 11th February, n=1,001

Confidence in State leadership bolstered

Survey

Confidence across State governments remains strong, except in Victoria following the circuit-breaker lockdown in February.



Q14. How confident are you in our...

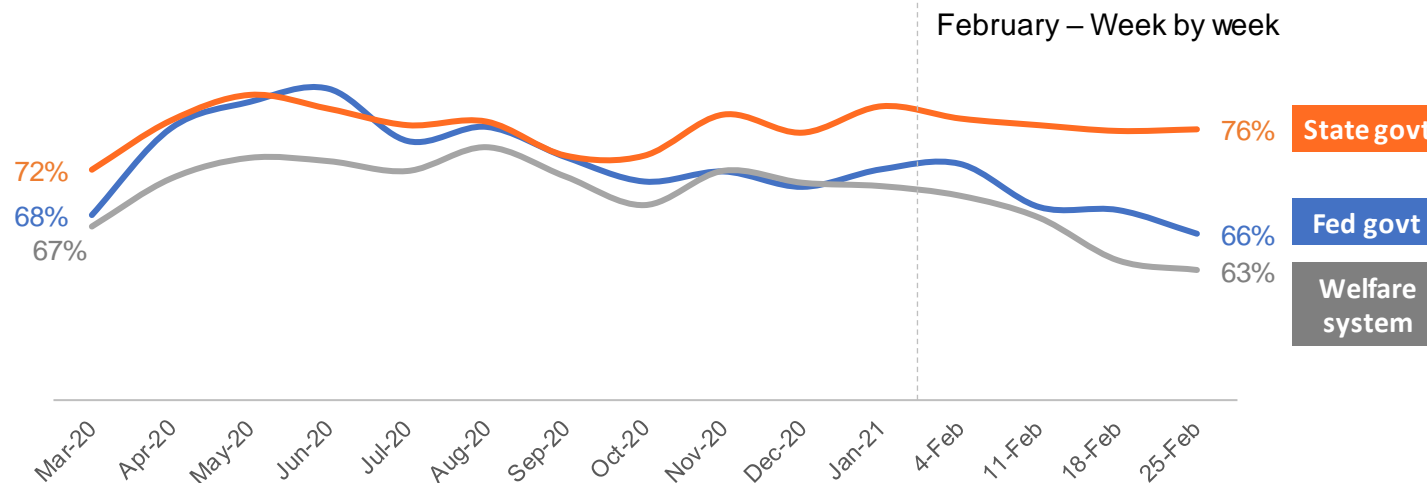
All respondents, n per month: NSW, n=c. 300-1,500; VIC, n=c. 260-1,500; QLD, n=c. 300-1,500; SA, n=c. 160-1,000; WA, n=c. 180-1,200.

Support of Federal leadership softening

Survey

Confidence – by Week

(% completely/somewhat confident)



Across the nation, as confidence in State governments remains high, **confidence in the Federal government has softened**. This follows a series of high-profile issues faced by the Federal government (including handling of sexual assault allegations).

Declining confidence in the welfare system is observed as we approach the end of the JobKeeper initiative, amid calls for it to be extended for certain industries. Confidence in the welfare system is **lowest in Queensland** (59% confident) where tourism job losses have been most deeply felt.

Q14. How confident are you in our...

All respondents, n=c. 1,000-7,300 per month; 1,000 for each week of February.

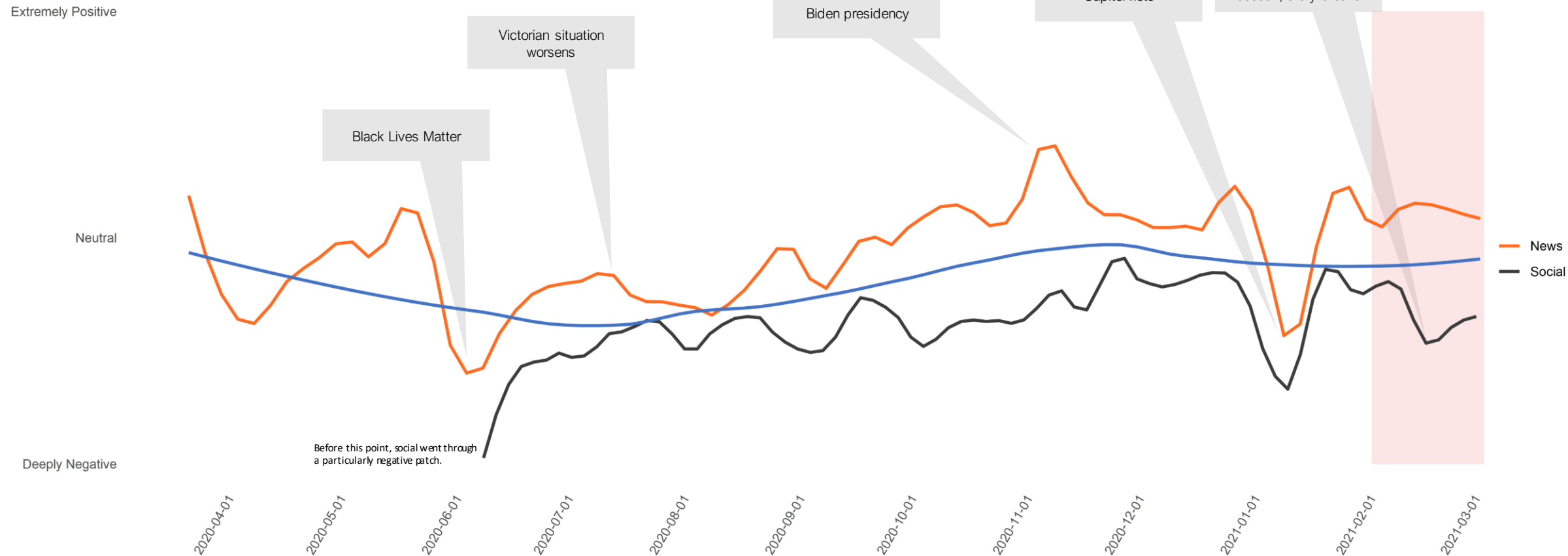
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CULTURE

Mood of a nation

Sentimental tone timeline

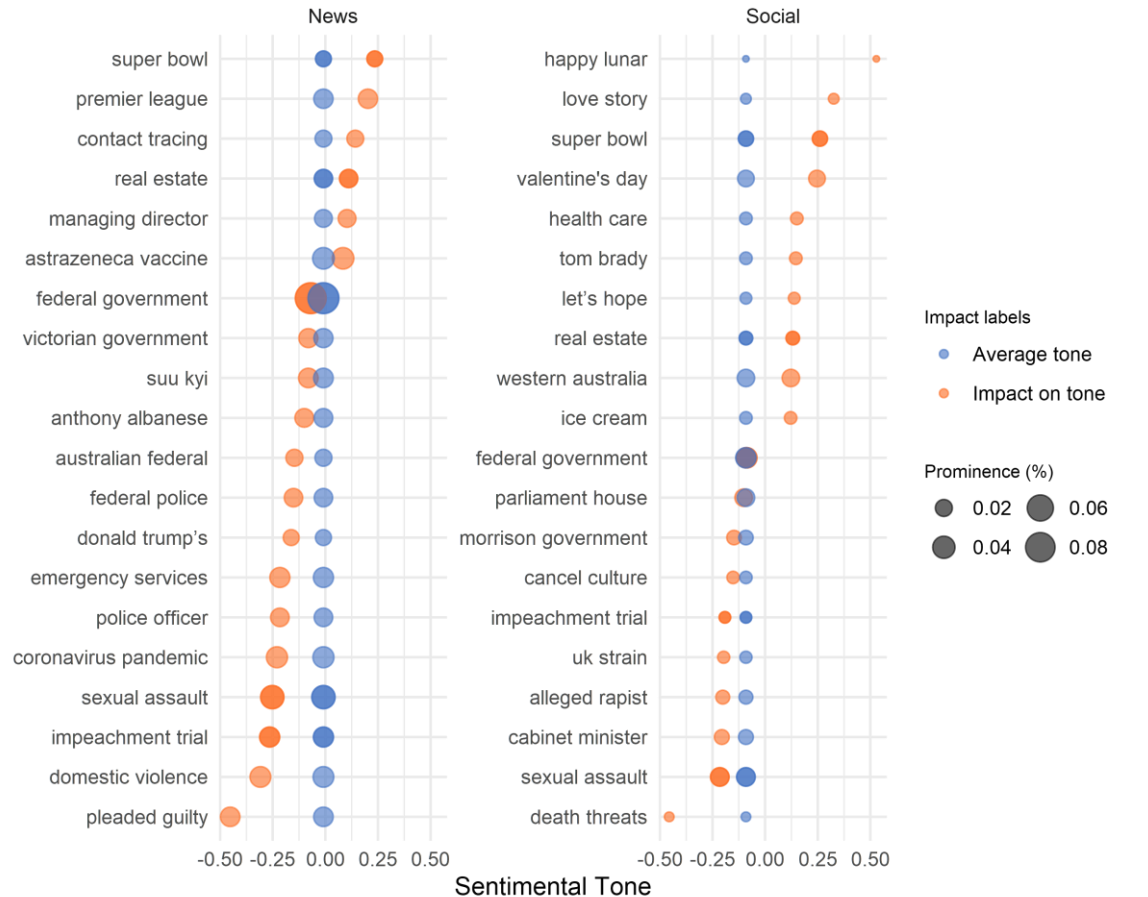
Aggregated daily sentiment from print and social media.
Timeframe (30 days) of this report highlighted



Mismatched tone

Drivers of sentimental tone

During periods of tonal difference between news and social over the last 30 days



Obviously, it's been a particularly traumatizing month in terms of what has been reported on. **However, the news kept their overall tone relatively afloat.**

Reports of the parliament house sexual assault did contribute to negative tone, but they weren't surrounded by emotional verbiages (death threats) and profanity (not listed). Hence, **the disparity between social's tonal response and the News.** The public response on social has been visceral.

'Cancel culture' is one to watch – it's been creeping up in prominence and now importance.

The real estate industry is being portrayed extremely positively.

3 Months in search- trended key categories

Increasing interest in mental health, social services, social issues, and alternative/natural medicines all suggest a **nation looking to live with uncertainty**. Interest in business and economic measures are looking relatively good, but **the shopping season has clearly slowed down**. The best news – Donald Trump's departure from the public eye has severely decreased interest in celebrity and entertainment news.



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