

AUS LIANOW

Report: 7 May 2021

Understanding AustraliaNOW

Using cultural tracking expertise and leveraging 25 years of insights generated from AustraliaSCAN, AustraliaNOW provides an ongoing understanding of Australians' attitudes and perceptions to life in Australia today.

Capturing emergent themes, how they co-exist and inter-relate, AustraliaNOW explores and defines 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.

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 59,000 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 – 3rd May 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

April 2021

MINDSET

National pride is high with how Australia is faring, with a majority (69%) **feeling that the country is headed in the right direction.**

Confidence remains high in our financial future against historical standards, but masks some of those faring less well.

Stress and anxiety is rising among those aged under 40 as signs of success become further out of reach. Youth unemployment remains a significant cause for concern.

As we watch the crisis in India unfold, an outbreak in NSW, and as our national border remains closed with no prospect for immediate international travel, **'normality' (however we may now define this) is feeling increasingly remote.**

PRIORITIES

Housing affordability is back on the agenda as low interest rates, pent-up demand and the return of investors continues to drive-up prices across the nation.

The pandemic has **brought us closer to our impacts on the environment** and climate change is now a dominant priority for government to act.

Mental health support is under pressure with one-in-two seeking some form of assistance in the last 12 months. More needs to be done to address the stigma, and professionally support those affected.

CONFIDENCE & LEADERSHIP

Despite the fear of a fiscal cliff at the end of March, **we have not seen a corresponding fall in financial confidence** as one would have expected.

But we are not all equal and there are **signs that financial stress is growing among the most vulnerable audiences** where support, financial assistance and financial education is required.

The elevated confidence in Government has started to wane as other non-COVID issues arise, some of which have **fueled controversy around how the Federal Government has handled them.**

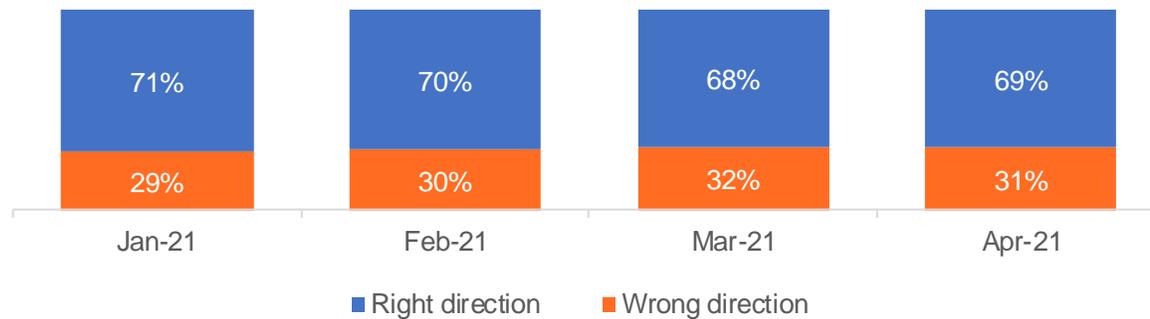
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MINDSET

Confidence is high

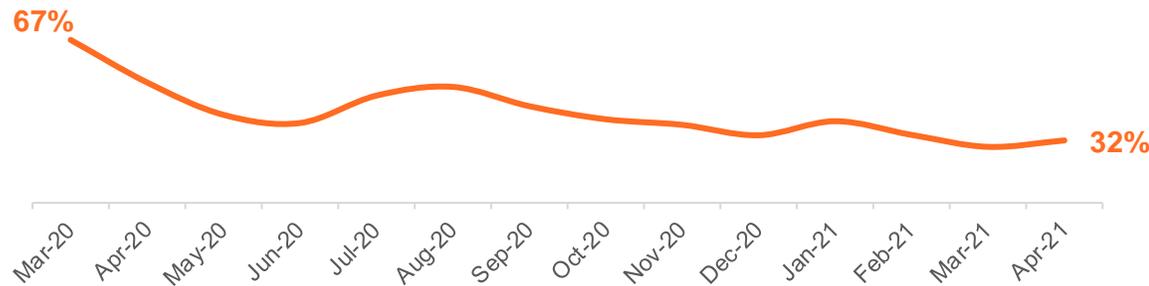
Survey

Is Australia going in the right or wrong direction?



Overall concern about the COVID-19 situation

(% very/extremely concerned)



According to the latest Westpac-Melbourne Institute Index of Consumer Sentiment, **consumer confidence is now at its highest level since August 2010.**

In addition, **our labour market is improving quicker than expected**. Contrast this with the worsening COVID-19 situation in some countries and a global death tally now exceeding 3 million, Australians have reason to be positive.

Indeed, **69% of Australians feel that the country is headed in the right direction** – a sense of national pride remains.

Concern about the COVID-19 situation in Australia remains low with 32% very/extremely concerned – less than half the proportion that were concerned in March last year.

Q7a - Thinking about the way things are going in Australia, do you think things are going in the right direction or in the wrong direction?

Q8 - How concerned are you about the Coronavirus/Covid-19 situation in general? Q10 - Do you agree or disagree with the following statements?

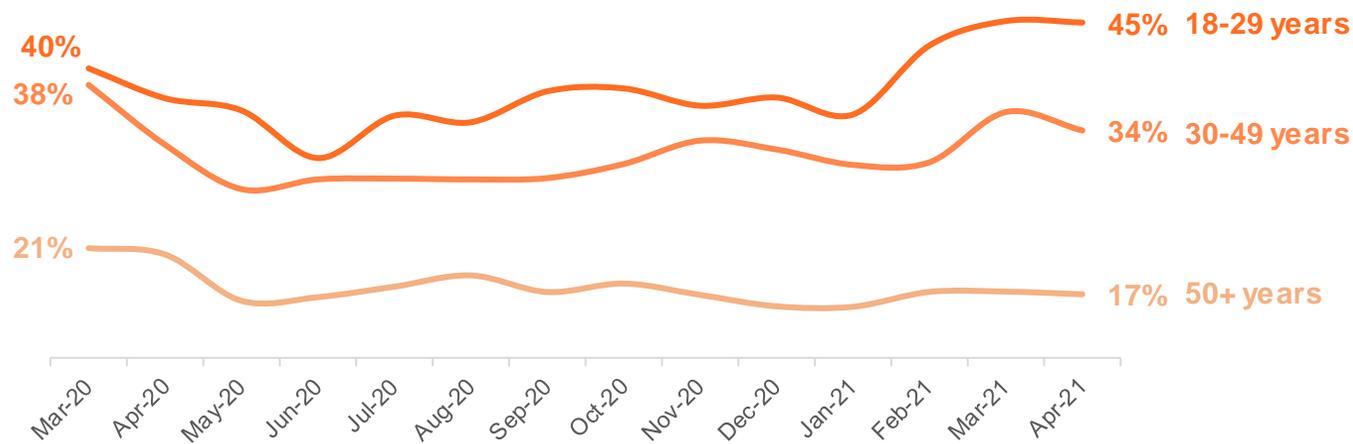
All respondents, n=c. 1,000-7,300 per month.

Young increasingly stressed

Survey

Stressed and anxious

(By age)



Despite headlines that the economy is positive, stress and anxiety is rising among those aged under 40 years.

Those aged 16 to 24, largely missed the recovery, with the number of youth jobs still down 2.0% (39,700 jobs) on March 2020. This contrasts with jobs growth of 1.0% (114,000) across the rest of the labour market.¹

Youth unemployment was already a significant issue prior to the COVID-19 crisis. Now, with younger people hit hardest by the pandemic's economic impacts, it's imperative to ensure an entire generation is not permanently disadvantaged.

Q7 - Thinking back over the last week, how often did you feel:
All respondents, n=c. 1,000-7,300 per month. Apr-21, n=4,007.

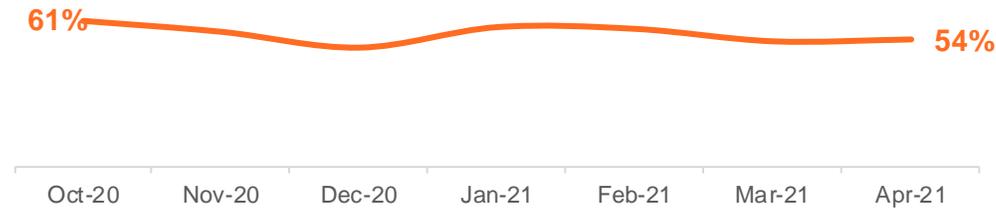
¹ Australian Bureau of Statistics (ABS): Job Vacancies Australia

We're lockdown wary

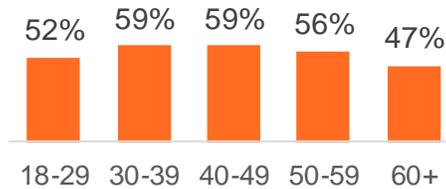
Survey

I cannot plan for the future at the moment

(% Agree, 4-6 out of 6)

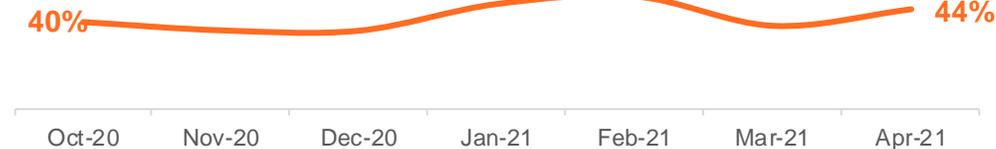


(By Age – Apr-21)

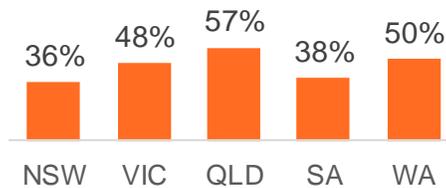


I believe my state will go into lockdown again

(% Agree, 4-6 out of 6)



(By State – Apr-21)



Certainty allows us to plan for the future and make **life decisions**.

Encouragingly, 46% of the population have sufficient **certainty to plan**.

However, for some the effects of regular lockdowns or the knowledge that one may occur leaves us in a **constant holding pattern** – 44% think their state will go into lockdown again.

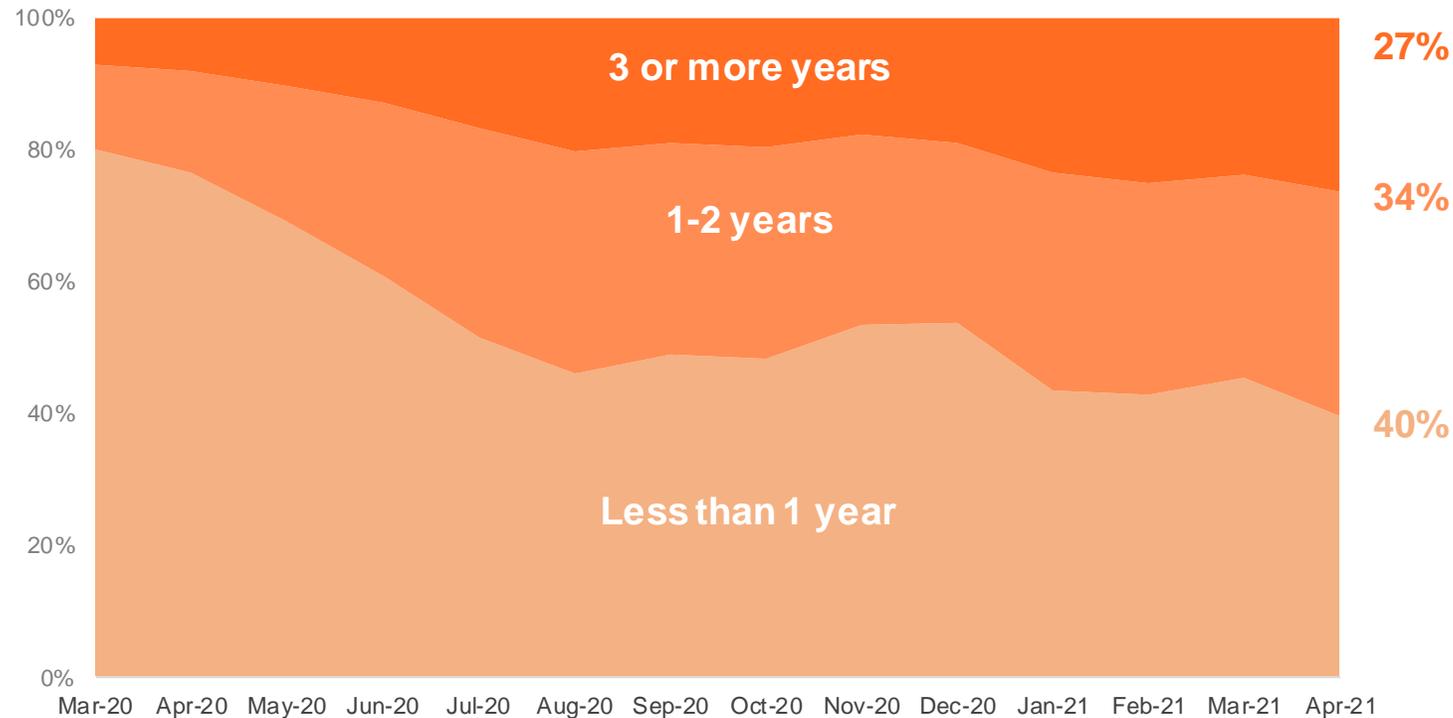
Q10 - Do you agree or disagree with the following statements?

All respondents, n=c. 1,000-7,300 per month. Apr-21, n=4,007.

Timelines extended further

Survey

How much longer until things go back to normal?



With a worsening crisis in India, a slower than expected vaccine roll out domestically, new variants and recurring outbreaks related to hotel quarantine the road back to normal is increasingly remote.

With international travel still on-hold and no definitive opening date, 60% feel that things won't be back to normal for at least another year.

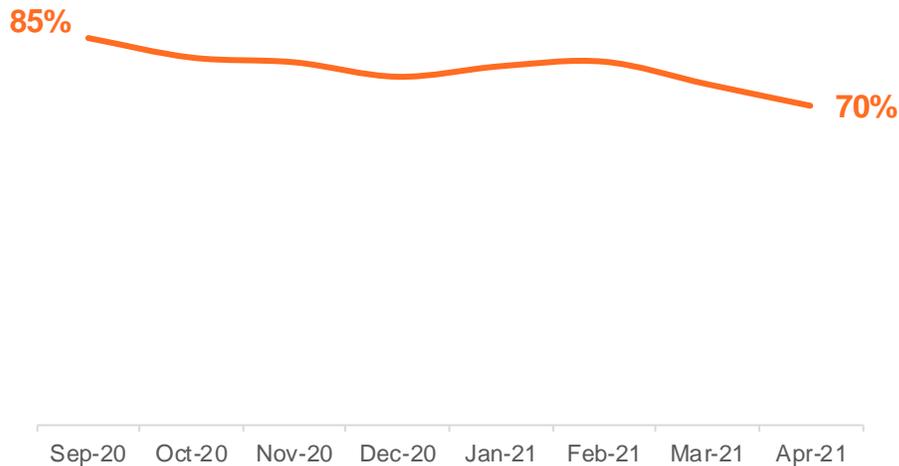
Q11 - How much longer do you think it will be until you feel like things will go back to normal in Australia?
All respondents, n=c. 1,000-7,300 per month. Apr-21, n=4,007.

Vaccine hesitancy

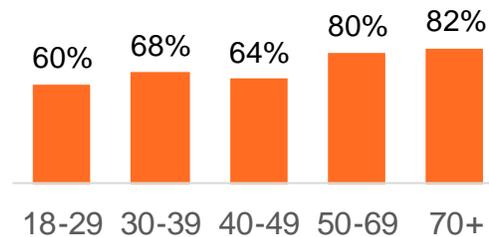
Survey

How likely would you be to get vaccinated?

(% Very/Somewhat Likely + Already vaccinated)



% Likely / Already Vaccinated
By Age (Apr-21)



Vaccines are the key to normality however it is concerning that likelihood to vaccinate is declining.

As the domestic threat from COVID-19 wains and news reports of side effects from the AstraZeneca vaccine persist **likelihood to get vaccinated has decreased.**

A recent study by the ANU¹ demonstrated that while willingness to take a hypothetically safe and effective vaccine has remained high, **8 in 10 Australians are concerned about possible side effects if they do take a vaccine.** Groups who are more likely to be hesitant included women, those who lived in relatively disadvantaged areas, those who spoke English as a second language, and those who lived outside a capital city.

2,396,314

vaccine doses administered in Australia as at 4th of May



Currently the target is to have all Australians vaccinated with at least their first dose by the end of 2021

Source:

<https://www.health.gov.au/sites/default/files/documents/2021/05/covid-19-vaccine-rollout-update-5-may-2021.pdf>

<https://www.health.gov.au/sites/default/files/documents/2021/03/covid-19-vaccine-rollout-update-on-14-march-2021-covid-19-vaccine-rollout-presentation-on-14-march-2021.pdf>

Q10g. If a government-approved vaccine to prevent or minimise the severity of coronavirus/COVID-19 was available to you right now at no cost, how likely would you be personally to get vaccinated?

All respondents, n=c. 1,000-7,300 per month. Apr-21, n=2,005.

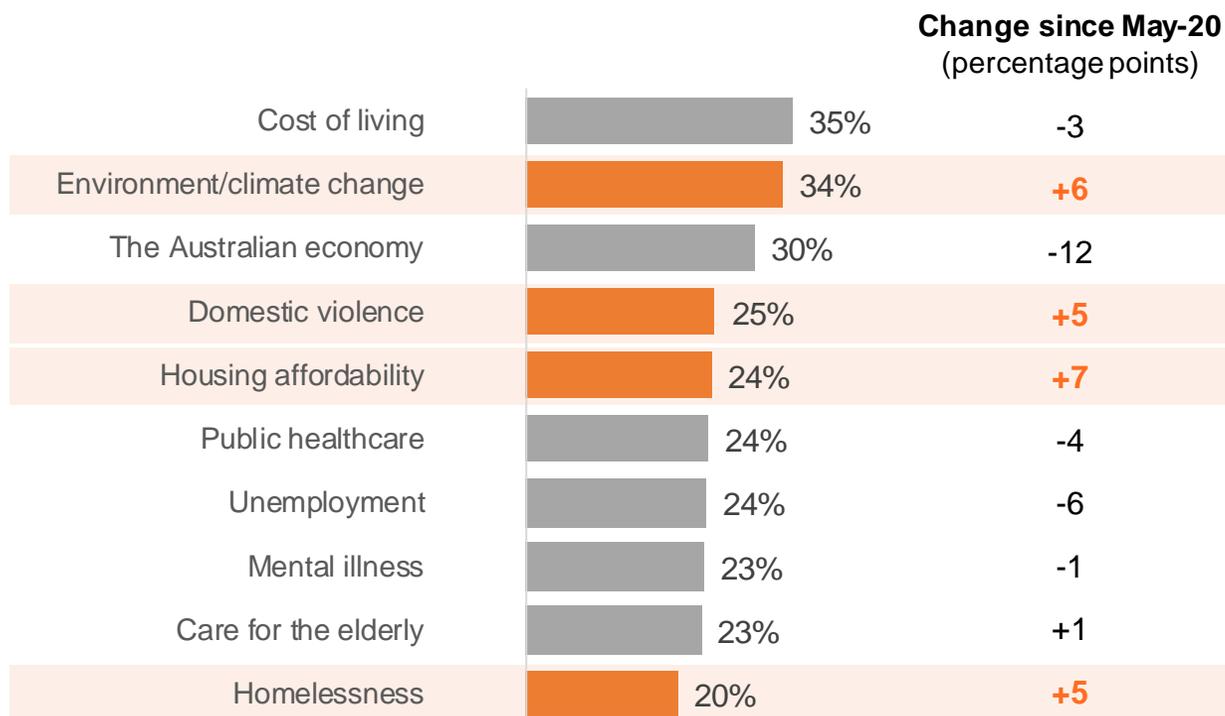
¹ Australian National University: Vaccine willingness and concerns in Australia: August 2020 to April 2021

Environment a rising priority

Survey

Most important things for government to take action on straight away

(Top 10)



As economic pressures ease for most and our personal COVID concern diminishes, the bigger challenge of **the environment and climate change is now high on our list of priorities** for government to act on straightaway.

With a supercharged housing market, where house prices are rising faster than incomes, **housing affordability is an area for government action**, adding to the stress and anxiety of young Australians yet to enter the market.

Mental illness continues to be a priority and those aged 18-29 were significantly more likely to cite mental illness as an area for the government to take action.

Q16a - Which of these do you believe are the five (5) most important things for government to take action on straight away?
All respondents, Apr-21, n=4,007. May-20, n=3,068

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ENVIRONMENT & SUSTAINABILITY

Climate change the overarching priority

The Black Summer bushfires of 2019/20 raised the national consciousness on climate change and its impacts. The latest AustraliaNOW findings reveal that we acknowledge the **immediacy** of the challenge and that **we are not doing enough as individuals, communities and as a nation**. Renewables, the circular economy and the need for environmental protection will likely grow in importance.

Key issues facing our environment that need to be addressed

Climate change/global warming/emissions

"The problem related to the environment that has the biggest impact on the environment is global warming. This problem must be resolved immediately before it gets worse."

"Eliminate release of carbon dioxide and other greenhouse gases onto the atmosphere."

Air pollution

"Traffic pollution is going from bad to worse."

Renewable/clean energy

"People need to be encouraged to become more sustainable. Solar power should be cheaper and more accessible."

Recycling/waste

"We need to recycle more. Recycle bins need to be put in place in the communities."

"We need to implement more recyclable materials and use less plastic. We need to be wasting less food and being more green."

Deforestation

"Stop chopping down trees."

Reducing our carbon footprint

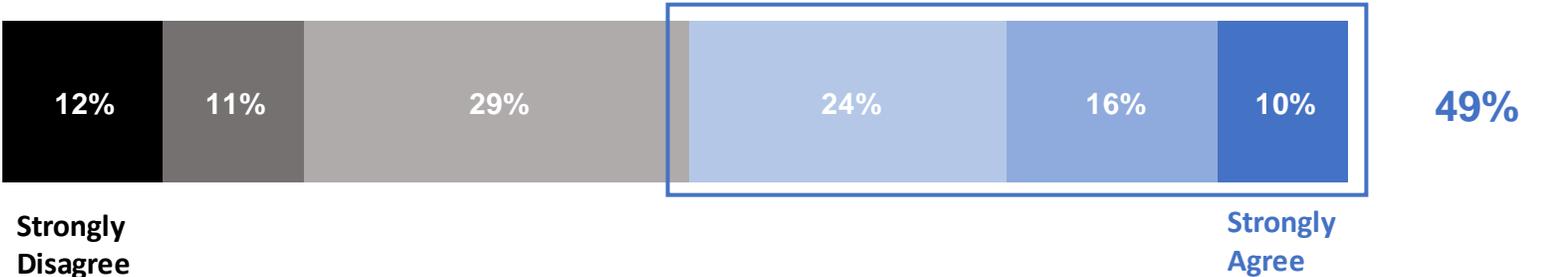
"We need to be aware of how much our carbon footprint is affecting the earth."

Q18r - What do you think are the key issues that need to be addressed in relation to the environment?
All respondents, April, n=2,004

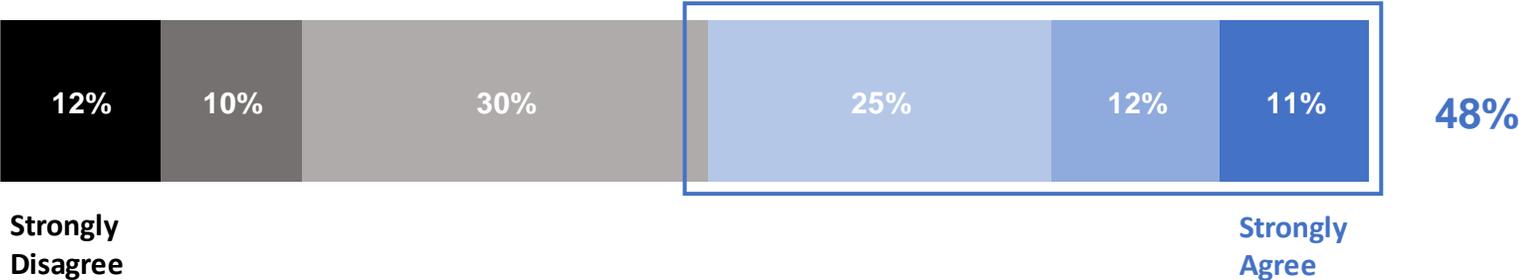
Pandemic prompting reflection

Survey

I am more concerned about the environmental impact of my household waste than before the pandemic



I am more conscious of my carbon footprint than before the pandemic



For around half of Australians, the pandemic has raised our concerns about our own personal impacts on the environment.

Interestingly, concern about household waste since the pandemic is most acute for those in Victoria. Victorians experienced the most severe lockdowns through 2020 and were more heavily reliant on online shopping. The visibility of packaging waste may have contributed to Victorians being more likely to reflect on their household waste and its impact.

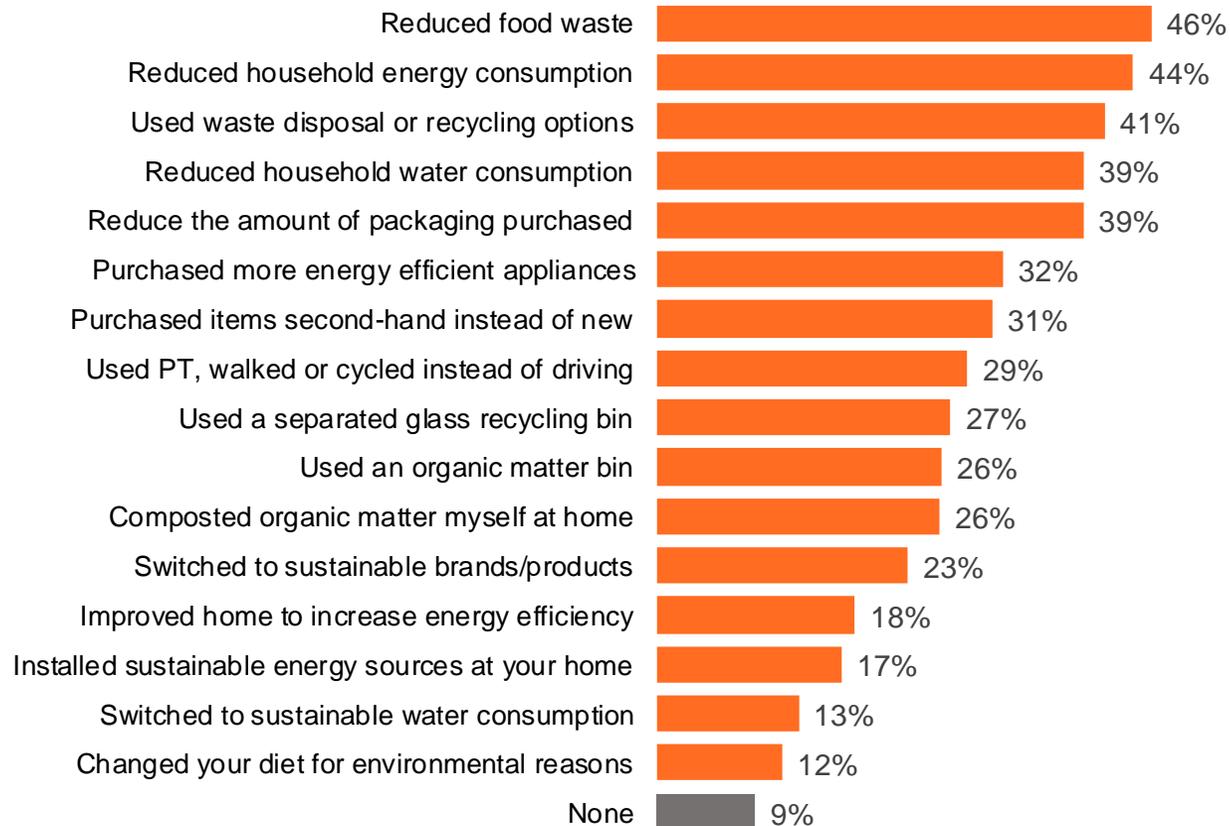
Images of empty roads and streets throughout 2020 prompted just under half (48%) to reflect on our carbon footprint.

Q18v - To what extent do you agree or disagree with the following?
All respondents, April, n=1,000

Almost all claim to have taken action

Survey

Behaviours undertaken in the past 12 months



Having spent **more time at home** in 2020, we are looking for ways to reduce our food waste and energy consumption, particularly in an environment of rising energy costs.

Encouragingly, **nine in ten have claimed to taken at least one action** and **71% have taken three or more actions**.

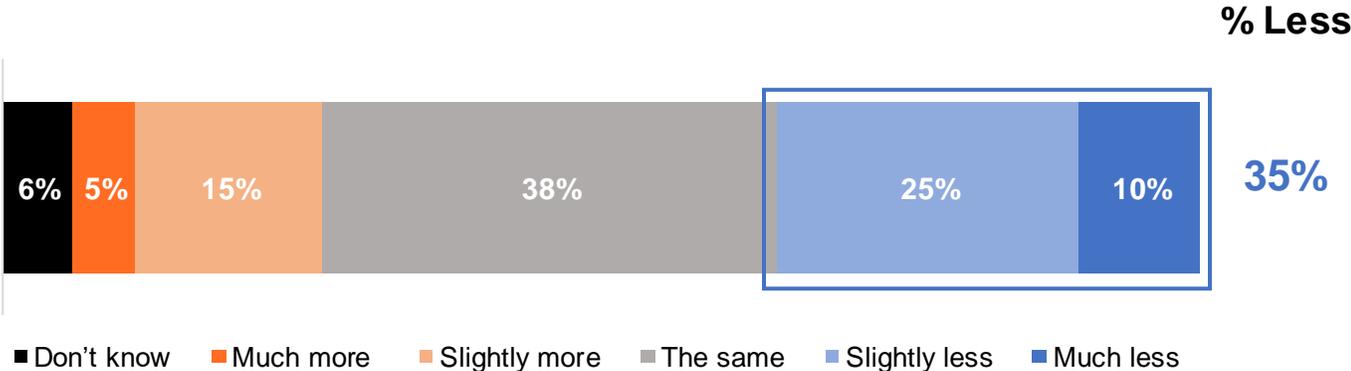
The most prevalent actions are relatively low effort and low impact activities and highlight the importance of intervention to motivate and drive adoption of more impactful environmental activities such as home energy efficiency.

Q18t. Have you done any of the following to minimise your personal impact on the environment in the past year?
All respondents, April, n=1,000

Bringing attention to waste production

Survey

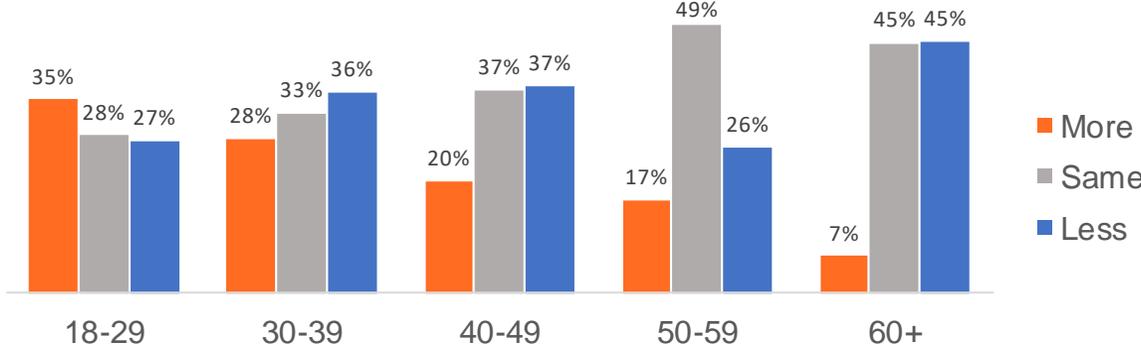
Amount of waste produced since the pandemic



During the pandemic, local councils across Australia saw a noticeable increase in volumes of household rubbish and dumping of waste triggered by a combination of more online shopping, home improvements, international workers returning to their home countries and a clearing out of unwanted possessions during the coronavirus lockdown.

Paradoxically, more households claimed they generated less waste than those who claimed they generated more waste.

- Those aged over 50 were more likely to claim to now generate less waste.
- On the other hand, couples/singles with kids under 18 as well as those aged between 18-39 felt like they were now generating more waste.

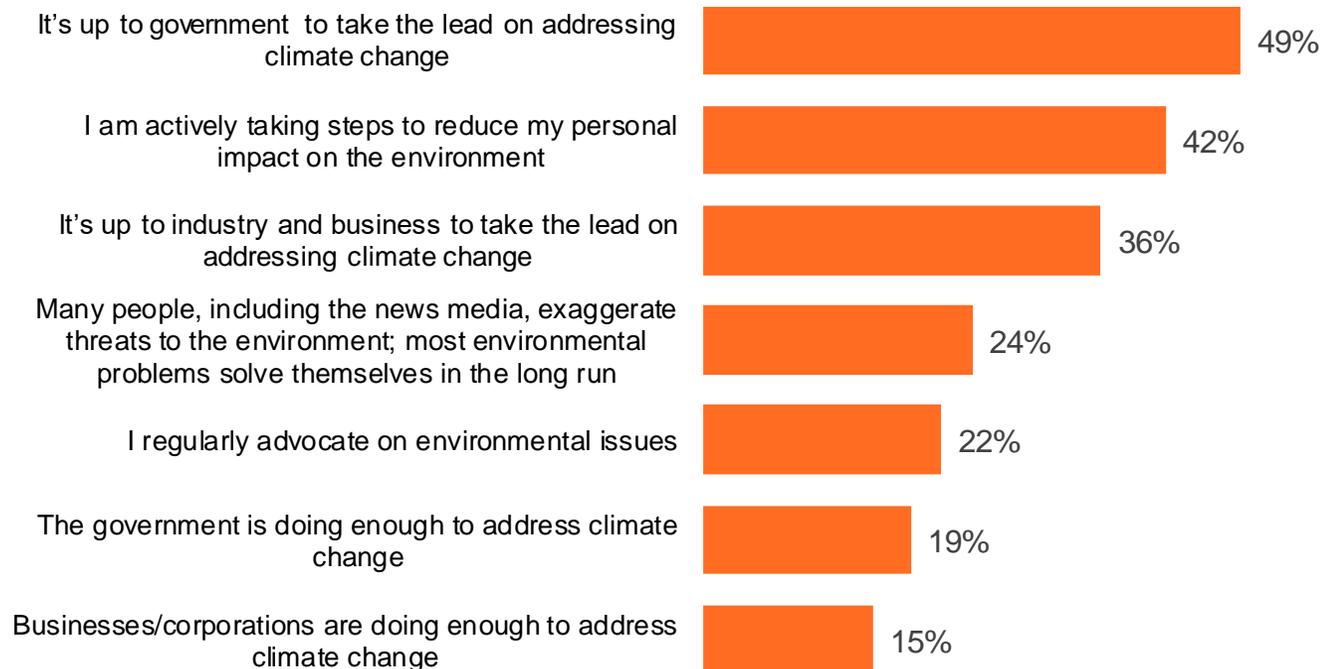


Q18u. Since the pandemic began, have you noticed your household producing any more or less waste than before?
All respondents, April, n=1,000

Individuals play a role, but **government needs to lead action**

Survey

% Strongly agree (5 or 6 out of 6)



We feel it is up to the **government to take the lead on addressing climate change and acknowledge the government is not doing enough** to address climate change.

Older Australians are more likely to agree that they are actively taking steps to reduce their impact on the environment over younger Australians aged 18-29.

Men are more likely to think that enough is being done by the government to address climate change and that environmental problems are exaggerated and will sort themselves out in the long run.

With a population who are primed for action on the big issues of climate change now is an opportune moment in history.

Q18s - To what extent do you agree or disagree with the following statements about the environment and sustainability?
All respondents, April, n=1,000

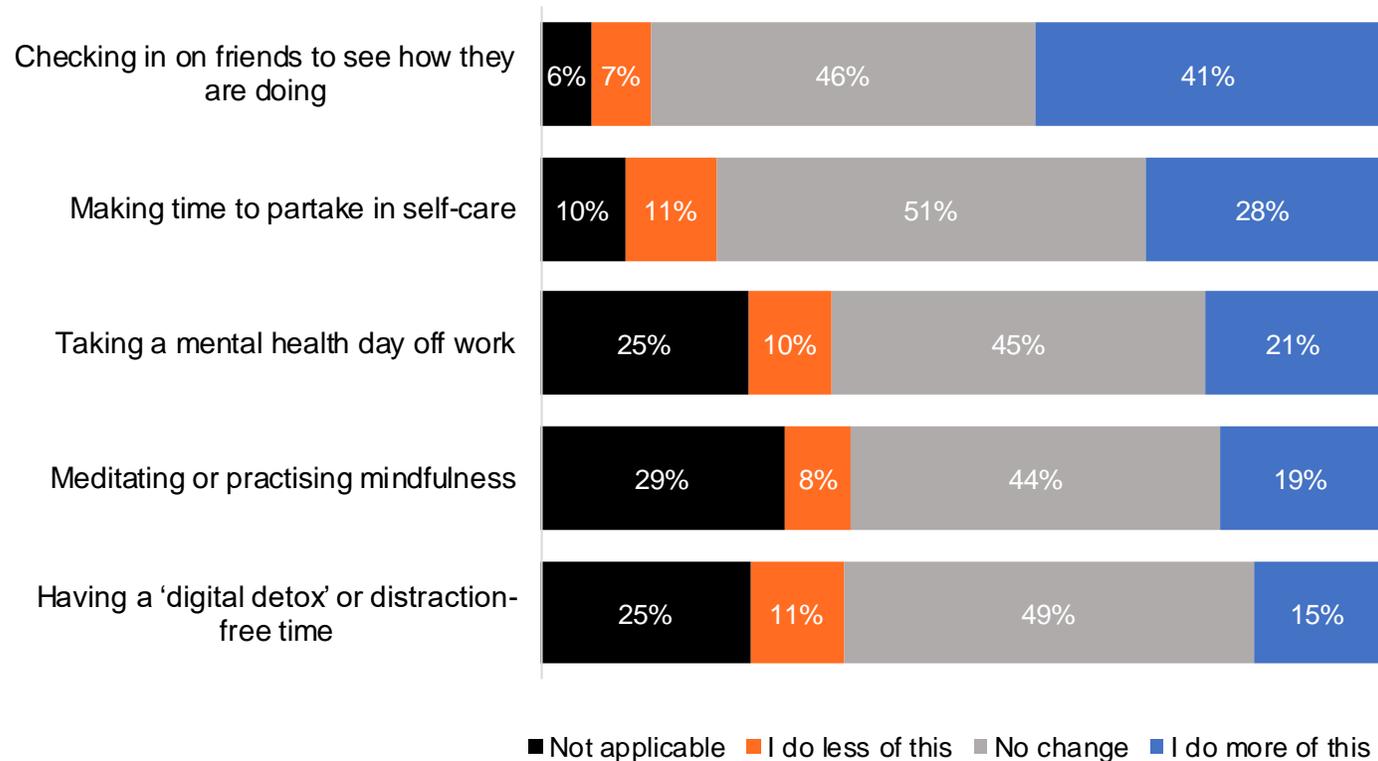
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MENTAL HEALTH

Checking in on others

Survey

Post pandemic mental health-related behaviour



Of all the legacies left by the pandemic, one of the most important is our **increasing tendency to check in on others** to see how they are doing. For many Australians, the pandemic has prompted a rise in compassion and a greater appreciation for the experiences we share.

In addition, 28% of Australians indicate they are more likely to **make time for self-care** compared to before the pandemic, and 19% more likely to practice meditation or mindfulness.

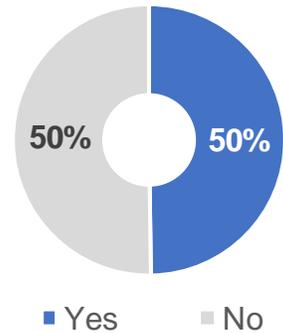
Around one in five (21%) are taking more **mental health days**, indicating the importance of workplaces to offer mental health support for employees.

Q18q. For each of the following, please indicate whether you are doing more, less or no change since before the pandemic.
All respondents, April, n=2,002

Mental health - don't suffer alone

Survey

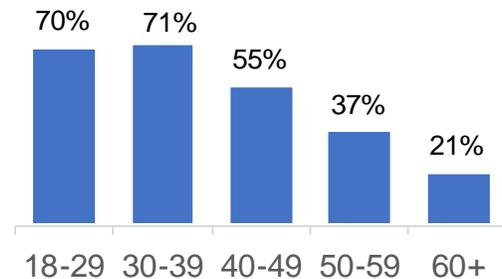
Accessed any mental health assistance in the past 12 months?



Type of mental health assistance used



Any mental health assistance used in the last 12 months by age



It is no surprise that mental health services are being pushed to 'crisis' point, with as many as **one-in-two Australians seeking mental health assistance** in the past twelve months and **39% seeking a professional resource**.

Assistance has been most prevalent in those **under the age of 40** where those **seeking assistance hit seven-in-ten**.

We know the impacts of mental health if not managed well are profound – creating **long term personal, social and economic impacts**.

Q18p - Have you accessed any of the following for mental health assistance in the past 12 months?
All Respondents, Apr-21, n=2,002

Awareness, understanding and acceptance Survey

With increasing prevalence, it is felt that mental health is becoming less stigmatised, more understood and more openly discussed.

Impact of pandemic on views of, or approach to, mental health

More discussion

"I think it is more openly discussed in society which I find a good thing as it has opened my eyes to how big the problem is and how it can appear where you least expect it."

No change

"It hasn't changed how I view mental health at all. I've always been aware of mental health issues even prior to COVID."

More acceptance/ less stigma

"I have become more accepting of the fact that I may be anxious or stressed. I no longer feel I have to hide it or feel ashamed. It is what it is."

Practice more self care

"It's more important than ever to look after your overall health which incorporates mental health."

Check up on friends, family/ reach out for help

"It's important to reach out if you're struggling and important to reach out to others and support them"

Increased awareness

"Created awareness for others who haven't been through isolation / depression before."

Own mental health declined

"It made me feel isolated and sad."

More needs to be done

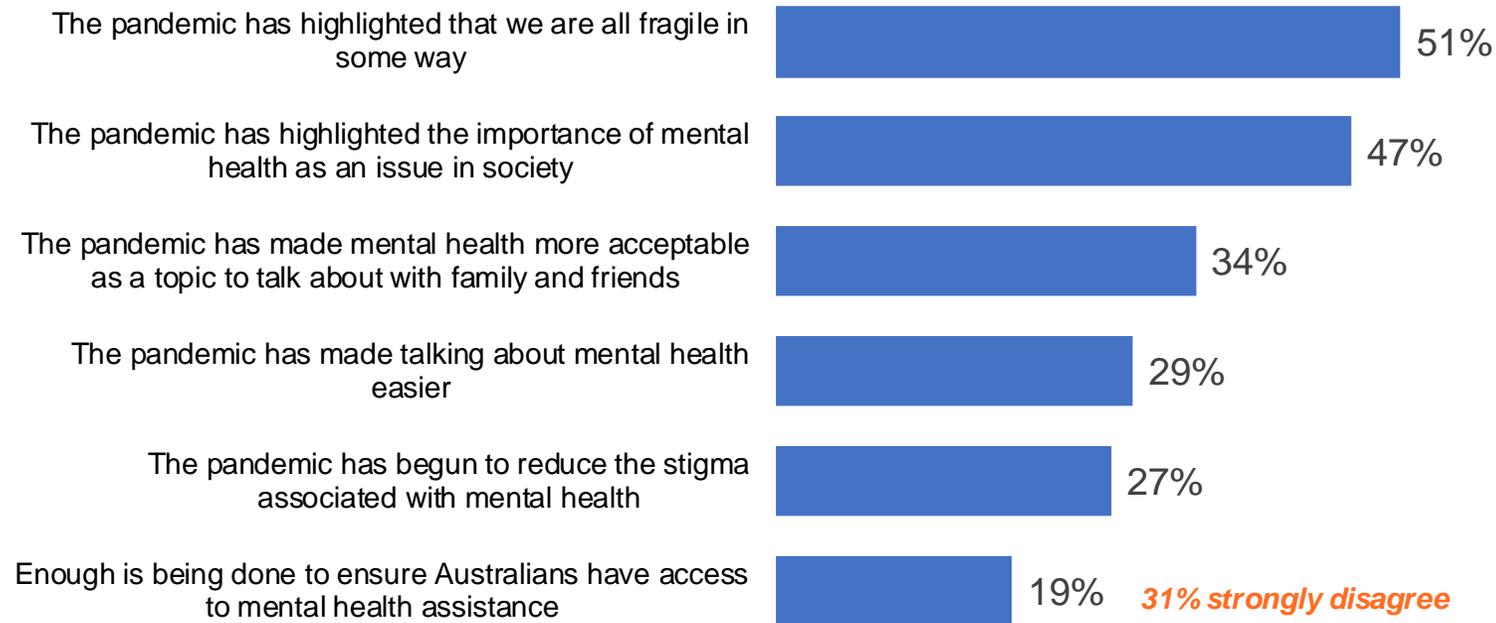
"I think we've realised that more needs to be done about mental health awareness."

Q18o - In your own words, how has the pandemic changed how you view or approach mental health (if at all)?
All respondents, April, n=2,002

...but more needs to be done

Survey

% Strongly agree (5 or 6)



The pandemic has **highlighted our fragility** and raised the profile of the importance of mental health as an issue in our society.

However, there is still a way to go with **43% disagreeing that the pandemic has reduced the stigma** associated with mental health.

A third (31%) **strongly disagree that enough is being done to ensure** Australians have access to mental health assistance.

Q18n - To what extent do you agree or disagree with the following statements about mental health?
All respondents, Apr-21, n=2,002

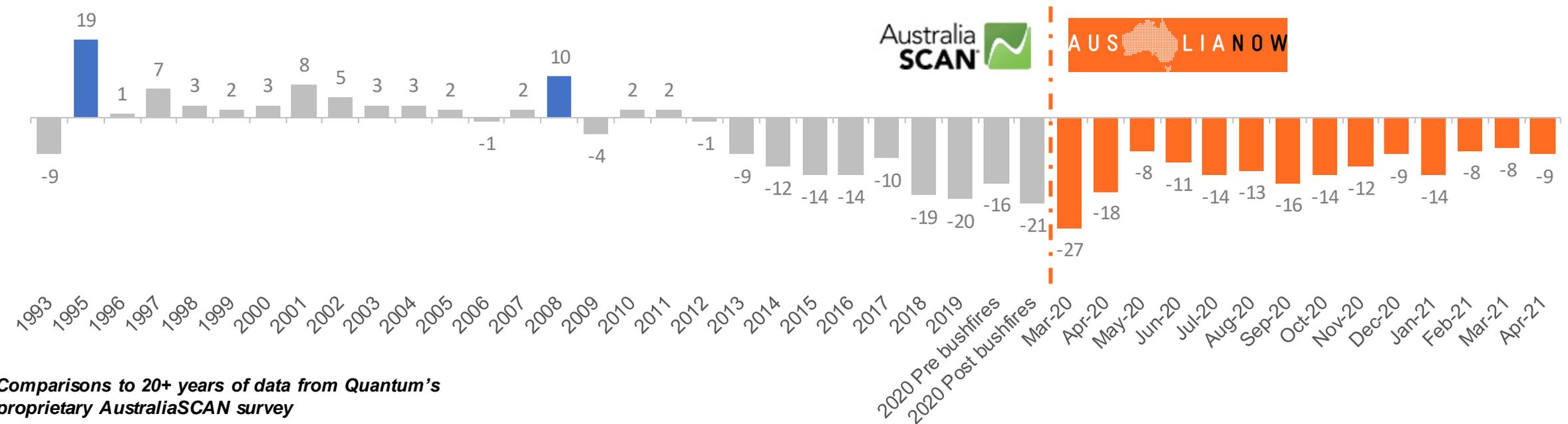
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CONFIDENCE & LEADERSHIP

Collective confidence upheld

Despite the fear of a fiscal cliff as JobKeeper ends and JobSeeker is drastically cut, we have not seen a corresponding fall in financial confidence for the future at a macro level as may have been expected.

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?

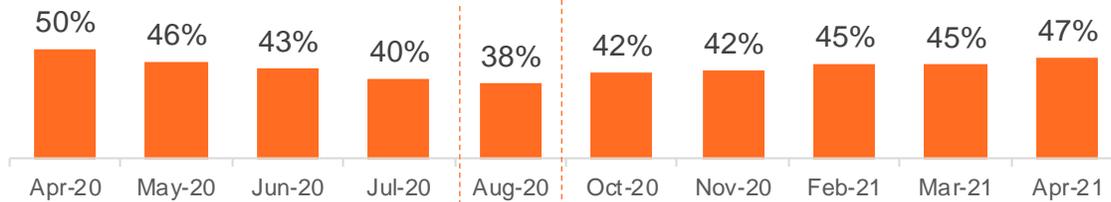
All respondents, n=c.1,000-6,000 per month

*Source: <https://www.abc.net.au/news/2020-12-03/australia-is-technically-out-of-recession-but-unemployment-high/12946336>

Bill stress remains high

Survey

Struggling to pay any bills

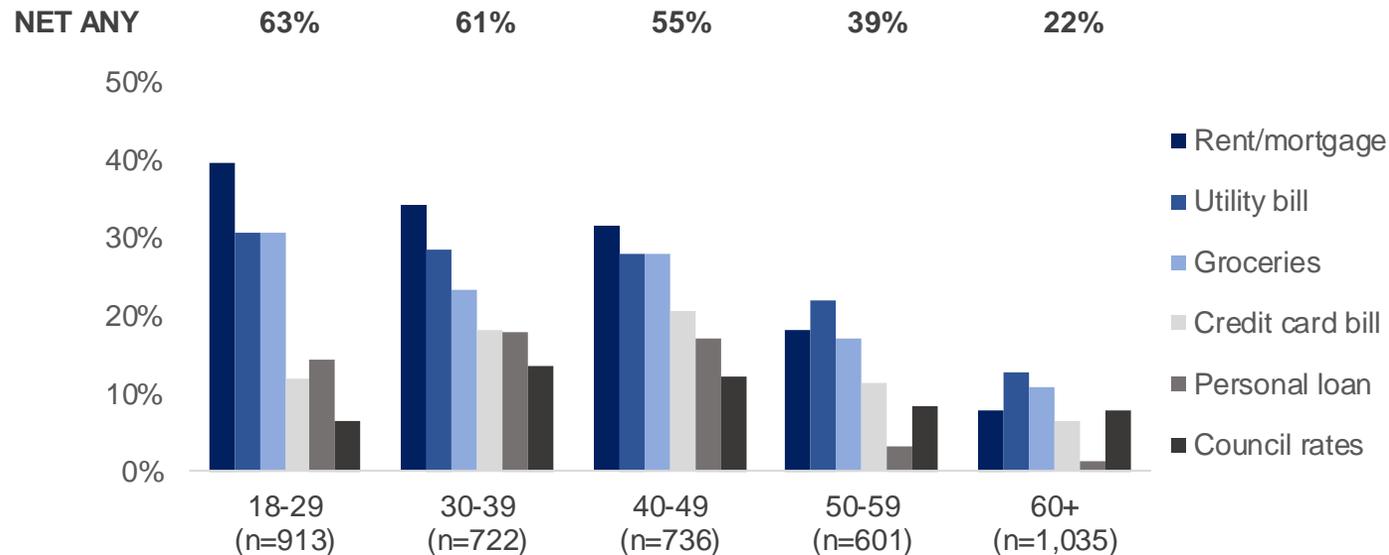


Despite positive economic news, bill stress is on the rise from the lows seen in August 2020, with **almost one-in-two experiencing some form of bill stress.**

Bill stress affects the young disproportionately where at least 30% of those aged 18-29 will struggle to pay their rent, utilities or grocery bills.

We know that **financial stress fell for the poorest households** during the pandemic, supported by the success of JobSeeker.

Those that received the Coronavirus supplement were under much more financial stress than other households¹. **How will these households fare in the coming months with such a reduction in financial support?**

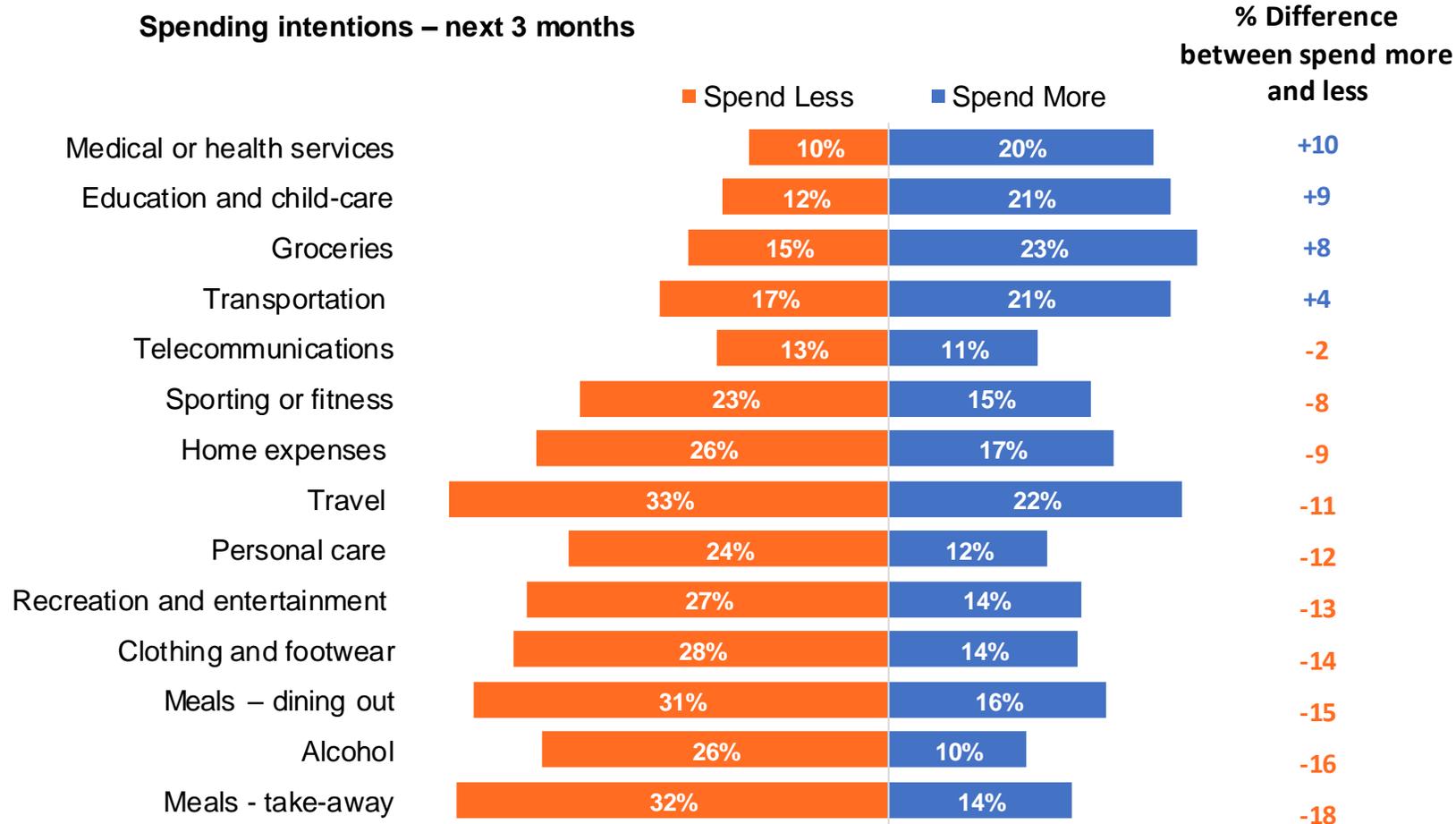


Q12. In the next three months do you think you will struggle to pay any of the following? Please select all that apply.
All respondents, Apr-21 n=4,007

Source: 1 [ABS: Household financial resources](https://www.abs.gov.au/australian-bulletin/2020/12/household-financial-resources)

Less travel, eating-out and take-away

Survey



With winter approaching we are **less likely to be spending on travel, eating-out and take-aways**. Groceries are likely to see a consequential up-tick.

We are also **catching up with those long overdue optical, dental or medical appointments** that we have put off for so long.

Despite being the most financially stretched, the anticipated increase in spending is being driven by **younger Australians** who are more likely to intend to increase their spending across all areas, while older Australians are the most likely to keep their spending consistent across the next three months.

Only includes those that would spend more or less, Removed N/A

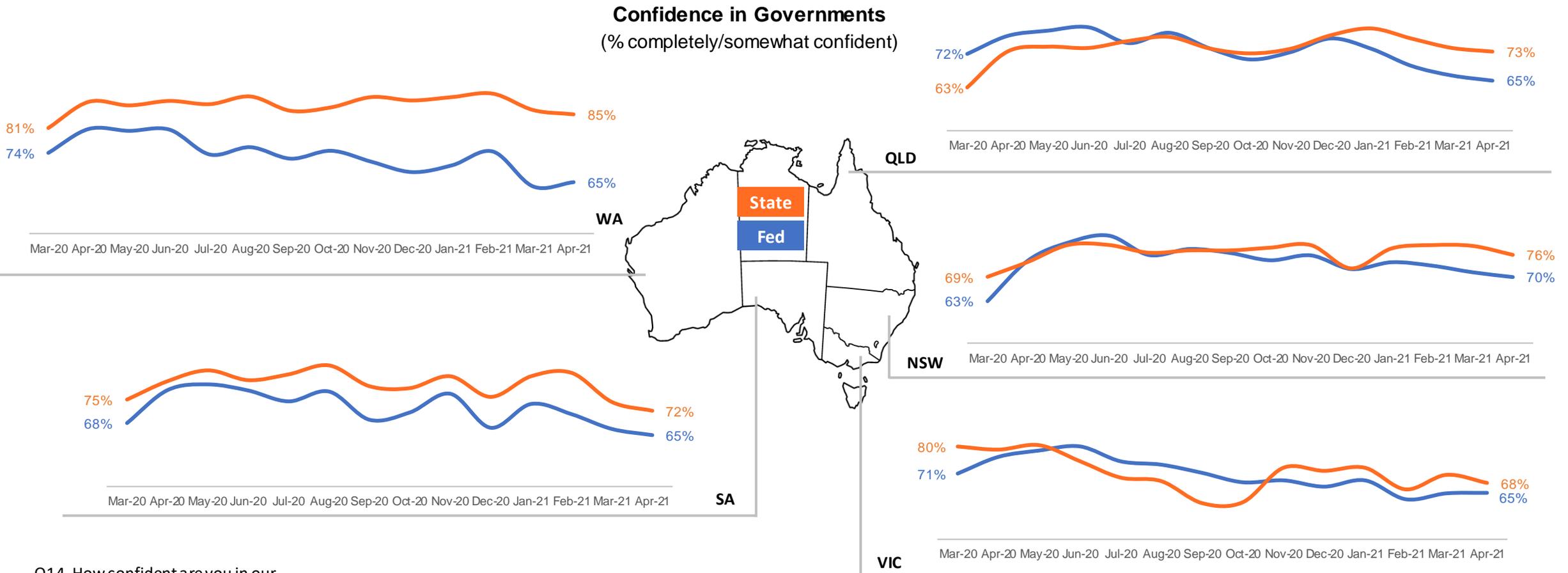
Q13p. In next 3 months, do you expect to spend more/less/same money in following categories?

All respondents, Apr-21 n=2,002

Confidence in Government dips

Survey

The elevated confidence in Government has started to wane as other issues arise some of which have fueled controversy around how the Federal Government has handled them.



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.

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Quantum
Market
Research

Imogen Randell, CEO
0419 575 846
imogenr@qmr.com.au / imogen@hallandpartners.net.au

Richard Frost, Managing Partner
0415 630 949
richardf@qmr.com.au