THINK WIDE NARRATIVES

ADAPTING TO THE NEW NORMAL

NATIONAL UPDATE #27

WAVE 27: Data Collection: 9-11 February 2022

Bastion™ Think wide

Adapting to the New Normal

WAVE 27: Feb 9-11, 2022

COMMUNITY SENTIMENT

Omicron reminded Australians the pandemic is far from over. While we have now experienced a peak in caseloads concern over infections remains. As such is not surprising, the level of concern in the community has increased significantly on all measures nationally following the Omicron wave, and concern remains high as of Feb 11.

Perceptions of the Federal Government response to COVID has plummeted further this wave. Almost 1 in 2 Australians (45%) hold negative perceptions of the federal government's handling of the pandemic And at a state level, perceptions of the Federal and state government's COVID response are now lowest in QLD (28% and 41% respectively).

EMPLOYMENT CONFIDENCE

Australians' confidence in employment in the next 12 months has rebounded this wave, with 70% of Australians confident about their employment over the next 12 months and only 14% not confident at all, with those in WA least confident (24%).

2022 is an employee's market and it will be challenging for employers to hold onto their team with our survey showing significant shifts in the workforce with 28% of Australians now claiming to have changed jobs since the start of the pandemic (12pp increase since Nov 21), 17% changed careers and 12% have started a business. For those employees working from home, around 50% do not expect to return to the office within the next 3 months.

OMICRON EXPOSURE CONCERNS

Omicron turned Australia's summer break into a very different one from what was expected in November last year. It heightened Australians concerns about exposure in most situations. With 12% of the population having now contracted COVID, most Australians (69%) remain somewhat vigilant to avoid infection.

88% of Australians claimed Omicron impact their behaviour in some way with many choosing to self-isolate (35%), 20% forced to self-isolate due to infections (self or HH), others choosing to avoid 'risky' situations and cancel plans.

OMICRON FLOW-ON IMPACTS

The flow on impact of Omicron to businesses was also felt by most Australians with 71% experiencing product availability issues, 56% delivery delays and 40% impacted by staff shortages in hospitality.

When it comes to travel, Omicron blew up our travel plans, with almost 1 in 2 Australians cancelling travel plans over the break. Only 28% of Australians had a holiday, 18% intrastate, 8% interstate and 4% overseas.

But as we approach the end of summer, there is now even more pent-up demand, with almost 1 in 2 Australians planning interstate holidays within the next 3 months. Consideration to travel to NSW and VIC has shown increases this wave.

AUSTRALIA'S OPTIMISM AND 2022

While Omicron wreaked havoc over the summer period, life satisfaction remains relatively stable, and personal optimism has increased. But as a nation, our optimism remains low.

Most Australians (58%) now believe COVID will have a significant impact for at least 2 more years, while almost 14% believe COVID is here to stay (down from 19% in Nov).

Significant price rises top the list of expectations for 2022 (84%) and more than 3 in 4 expect interest rate rises as well (77%). Along with this, most Australians are preparing for ongoing disruptions to events (78%), product shortages (76%) and significant staff shortages (71%). But it's not all gloomy, with 61% expecting a return to overseas travel and 53% seeing a return to 'normal' education and 1 in 2 Australians expecting a return to 'normal' shopping behaviour.

As we approach the 2-year anniversary of the pandemic, we reflect on how the omicron turned our Christmas and summer holiday period into another rollercoaster ride. Concerns for personal and community health and the economy all increased, and concerns of COVID exposure prompted most Australians to change their behaviours again, with 35% choosing to self-isolate, while another 20% isolated due to infections (self or HH). This led to flow on impacts experienced by 86% of Australians and more than 1 in 3 Australians cancelling their summer travel plans. As we approach late February, with the worst of omicron behind us, Australians remain relatively optimistic for their personal futures, but less so for Australia as a country. While they expect a return to 'normal' education and shopping behaviour, and even overseas travel in 2022 there are also expectations of a price increase and interest rises coming in 2022, and most believe it will be at least 2 more years before the pandemic is no longer having a significant influence on our lives.

ABOUT THIS REPORT

COVID TIMELINE & CONTEXT FOR THIS REPORT:

Bastion has been tracking community sentiment since COVID first significantly impacted Australians' lives. Since our last report, Omicron variant surfaced in Australia just as the country was preparing to reopen borders and celebrate Christmas. Omicron resulted in Australia seeing daily caseloads exceed 100,000 with hospitalisations and death also peaking in this period. As this survey was fielded, Australian school children had returned to school and cases had significantly declined.

COVID cases reached a peak seven-day average covid cases nationally of 109,000 in mid-January. As of 11 February, the seven-day average covid cases nationally was 24,630 and 2.9M Australians have had COVID.

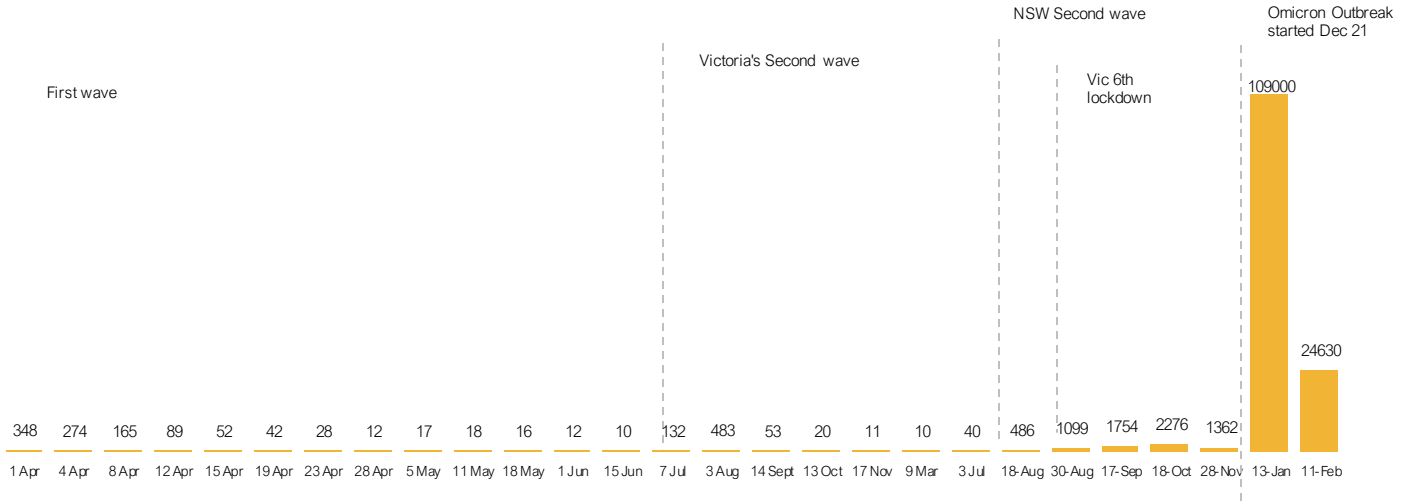
Our survey sample this wave shows a marginally lower rate of vaccinated with 92% vaccinated -34% double, 53% triple vaccinated, 5% single vaccinated. 12% of the sample claim to have had COVID in line with national statistics.

ABOUT THE SURVEY

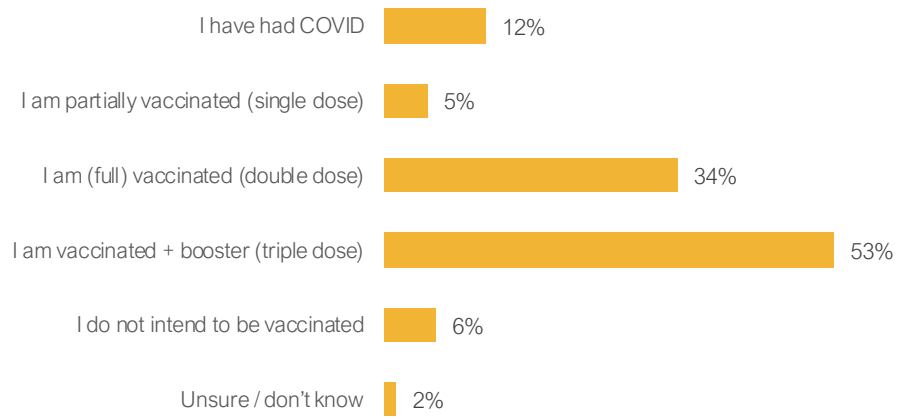
'Adapting to the New Normal' survey has been conducted for almost 2 years since the commencement of the pandemic. It is an online survey with a nationally representative sample of 1000 Australians each wave. This report from wave 27 is based on a total sample of 1048, surveyed 9th Feb – 11th February 2022.

Fieldwork dates for each wave are: Wave 1: March 27-30. Wave 2: 31 March – 1 April. Wave 3: April 3-4 Wave 4: April 7-8 Wave 5: April 10-12, Wave 6: April 14: Wave 7: 18-19 April Wave 8: 22-23 April, Wave 9: 25-28 April,, Wave 10: May 1-3, Wave 11: May 8-10, Wave 12: May 15-17, Wave 13 May 28 – 1 June. Wave 14: 12-15 June; Wave 15 July 3-7, Wave 17 30 July – 3 August, Wave 18, Sept 10-14, Wave 19 Oct 9-13, Wave 20 Nov 13-17 20, Wave 21 3-9 Mar 21, Wave 22 June 30-3 Jul 21, Wave 23 August 13-18 21, Wave 24 15-17 September 21, Wave 25 - 5th -18th October 21, Wave 26 23-28 November, Wave 27 9-11 February 2022.

COVID CASES NATIONALLY (AV. LAST 7 DAYS)



VACCINATION & COVID STATUS OF SURVEY SAMPLE



12%
Have had COVID

IMPACT & COMMUNITY SENTIMENT

LEVEL OF CONCERN

Not surprisingly, the level of concern in the community has increased significantly on all measures nationally following the Omicron wave, and concern remains high as of Feb 11, despite COVID cases significantly declining.

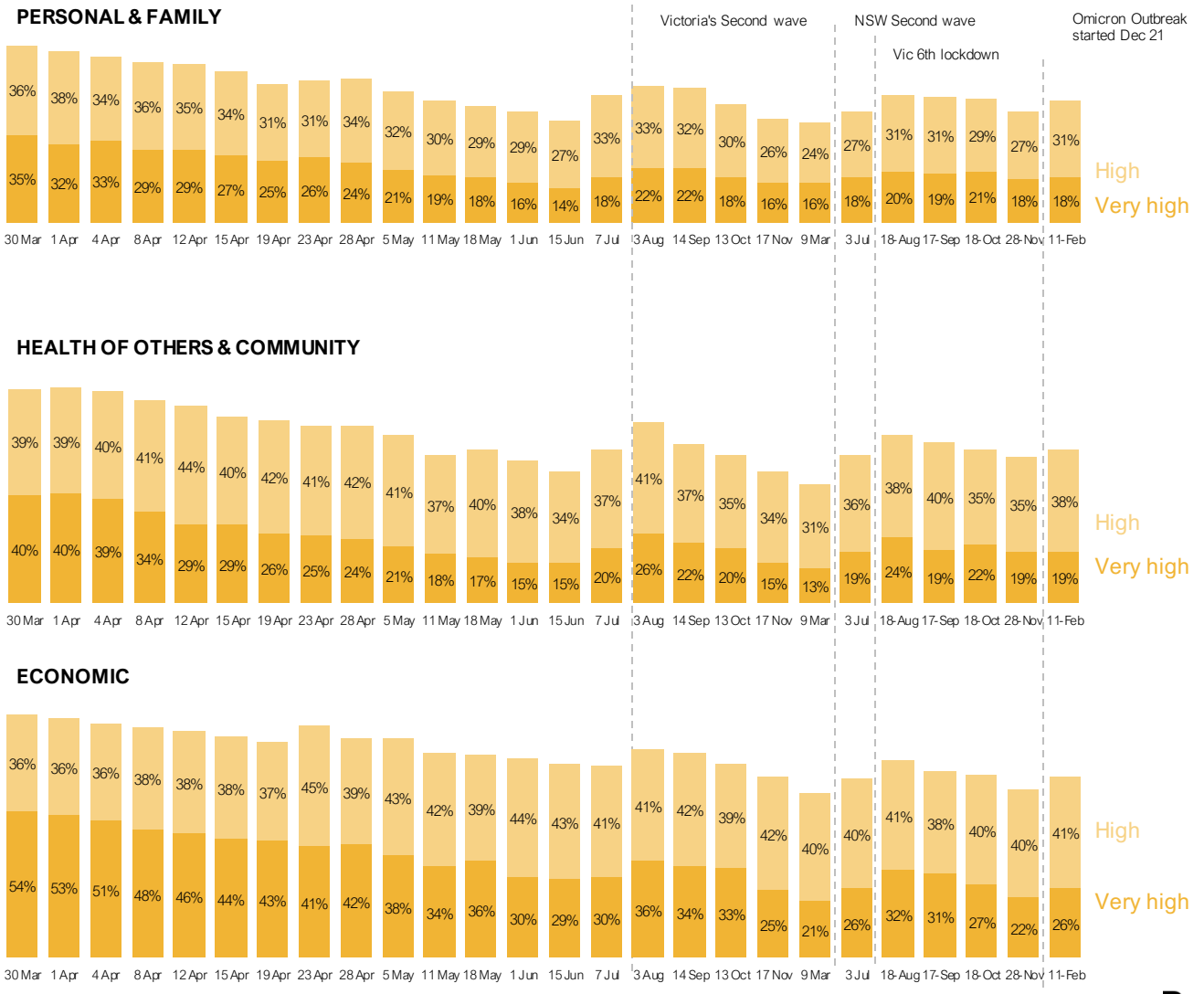
67% Australians concerned about the economy (up 5pp)

57% Australians concerned for the health of the community (up 3pp)

50% Australians personally concerned (up 5pp)

> Omicron reminded Australians the pandemic is far from over. While we have now experienced a peak in caseloads concern over infections remains for most Australians, and the hope the pandemic was behind us, has all but gone.

NATIONALLY – LEVEL OF CONCERN



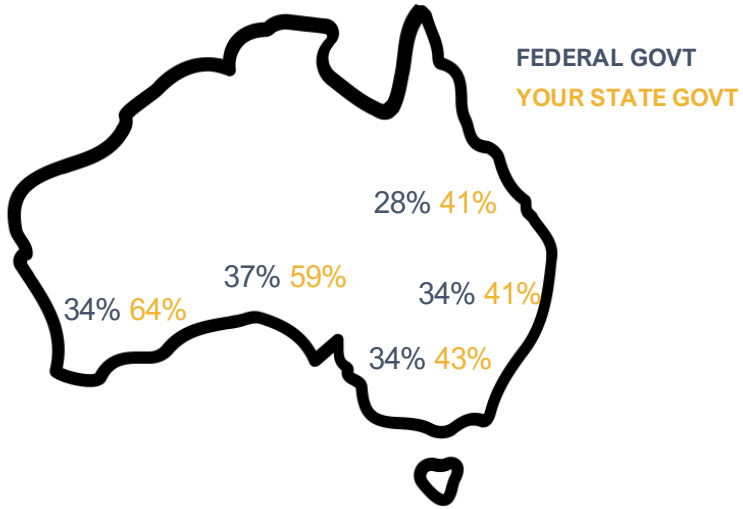
GOVERNMENT RESPONSE

GOVERNMENT PERCEPTIONS REBOUNDING

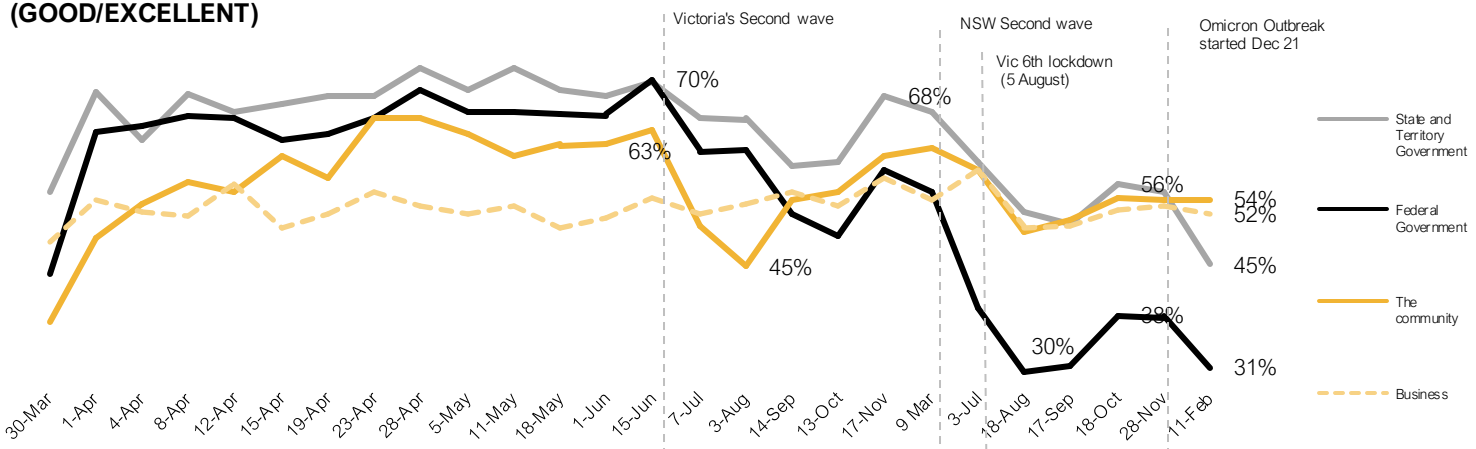
Perceptions of the Federal Government response to COVID has plummeted further this wave. Australians are more likely to hold negative perceptions (45%) of the federal government compared to a much smaller portion who hold positive perceptions (31%).

Looking around the country, positive perceptions of the Federal government's COVID response are now lowest in QLD (28%) and NSW/ VIC (34%). While, perceptions of State Government responses remains most favourable in WA (64%), followed by SA (59%), QLD (54%) and VIC (43%) NSW (41%), QLD (41%) now the lowest.

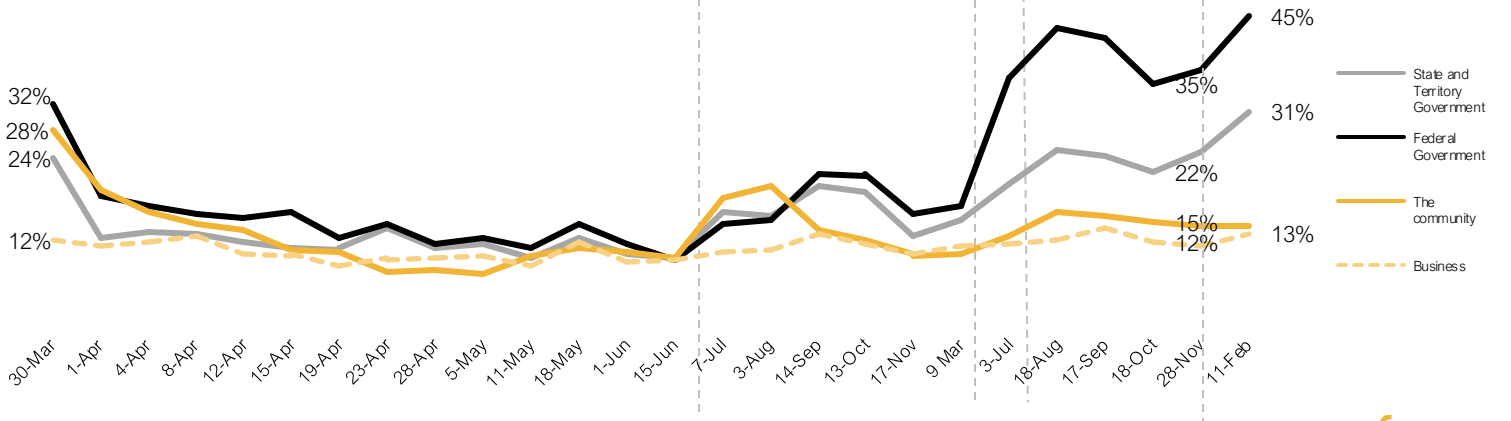
PERCEPTIONS OF GOVERNMENT RESPONSE
(GOOD / EXCELLENT)



NATIONAL - PERCEPTIONS OF RESPONSE TO COVID-19 CRISIS (GOOD/EXCELLENT)



NATIONAL - PERCEPTIONS OF RESPONSE TO COVID-19 CRISIS (POOR / VERY POOR)

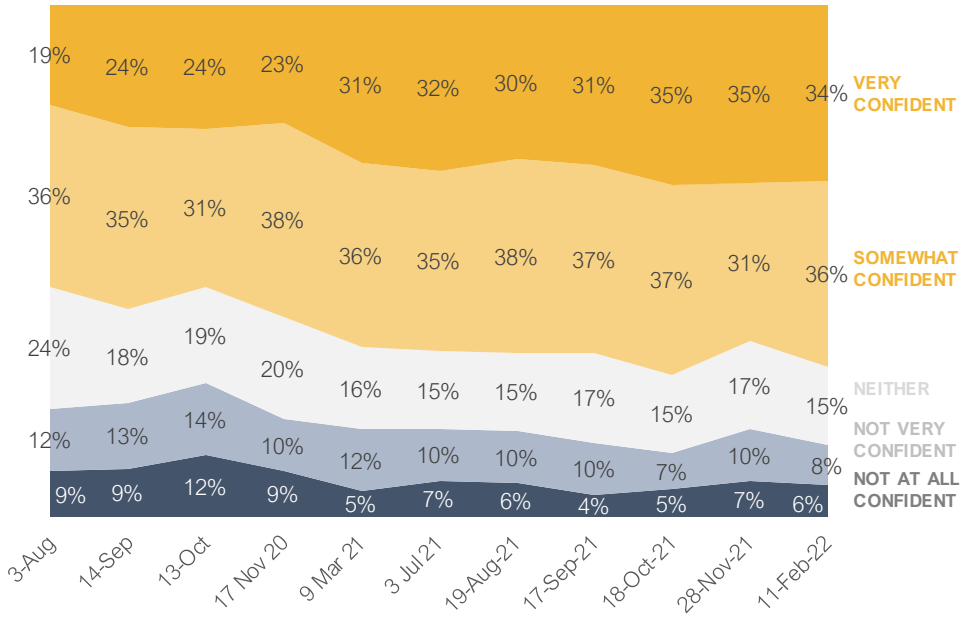


FINANCIAL & WORK IMPACT

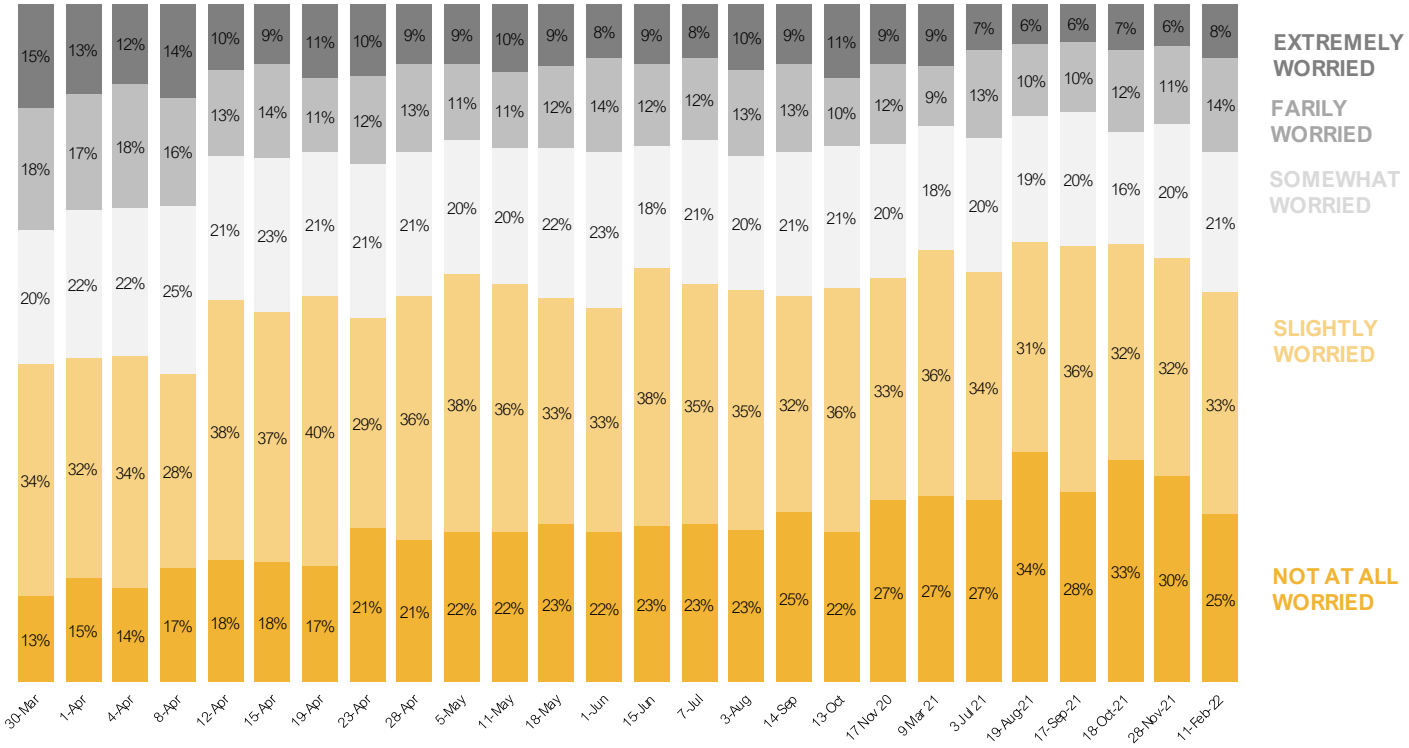
EMPLOYMENT CONFIDENCE RISES AGAIN

Australians' confidence in security of employment in the next 12 months has rebounded this wave, with 70% of Australians confident about their employment over the next 12 months and only 14% not confident, WA residents are least confident in their employment security (24%), likely due to the uncertainty of when border restrictions will ever be lifted. Those who are unvaccinated and do not intend to be vaccinated are far less least confident (41%).

CONFIDENCE IN SECURITY OF EMPLOYMENT
FOR NEXT 12 MONTHS



CONCERN ABOUT CURRENT FINANCIAL SITUATION



Concern about their own current financial situation has declined this wave, with fewer Australians (25%) not at all worried and 33% slightly worried, while there is a core segment of 21% (up 4pp) of Australians who are extremely or fairly worried about their financial situation.

21% Australians Report being fairly or extremely worried (up 4pp)

WORK & THE PANDEMIC

WORK CHANGES SINCE PANDEMIC

There has been significant shifts in the workforce since the last survey with 28% of Australians now claiming to have changed jobs since the start of pandemic (12pp increase since Nov 21), 17% changed careers and 12% have started a business. Through the pandemic we have seen dramatic changes in employment :

2020 saw no one leave work (if they had it), and those who had no work sought any job

2021 saw employment confidence pick up rapidly, and signs of 'the great resignation' starting to appear in Australia

2022 the shortage of labour means it is an employee's market and it will be harder than ever for employers to hold onto their team

28% Have changed jobs (up 12 pp from Nov)

17% Have changed careers (up 5 pp from Nov)

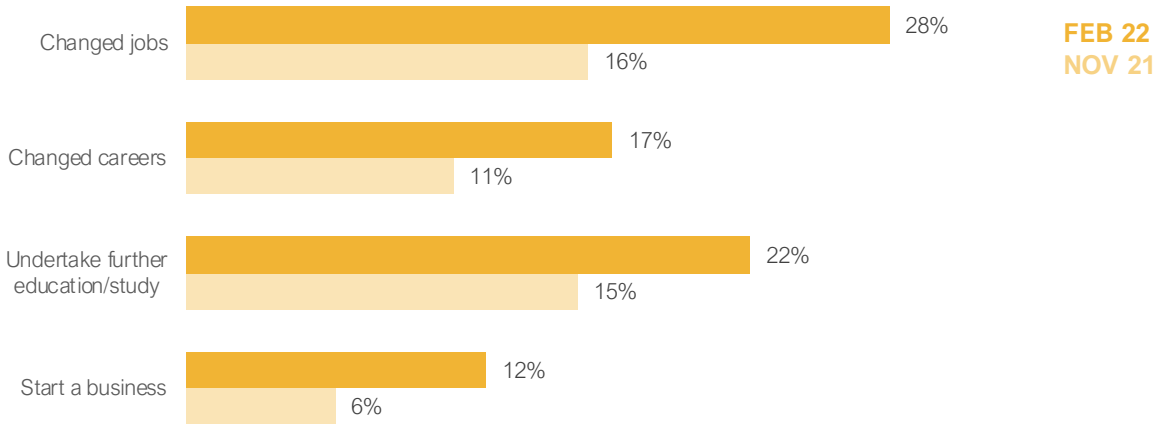
22% Have undertaken further study (up 7 pp from Nov)

12% Have started a business (up 6 pp from Nov)

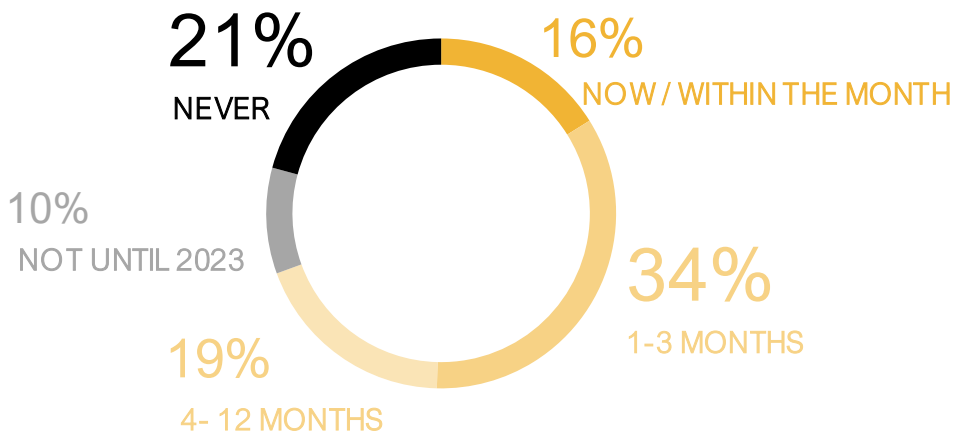
RETURN TO OFFICE PLANS

Omicron has also thrown return to office plans up in the air again. 16% of workers who are working at home claim they will return almost immediately, but most see a longer-term framework, with a third expecting to do so within 3 months, a fifth within 12 months, 1 in 10 don't expect to be back this year and 21% claim they will never return (down 2 pp from Nov). Females (26%) and workers over 50 years (37%) are more likely to say they will never return to the office.

CHANGES YOU HAVE MADE SINCE PANDEMIC



WHEN DO YOU EXPECT TO RETURN TO OFFICE



LIFE IMPACT & THE PANDEMIC

AUSTRALIANS' LIFE SATISFACTION

Australians' life satisfaction is stable since the last wave, with VIC showing the greatest improvement and is now above the national average, while NSW saw a dip (4pp) and WA now has the lowest life satisfaction (57 down from 63).

At the same time, Australians' have increased their sense of optimism for their personal future, but the level of optimism for Australia's future remains much lower than that seen in March 2021.

AUSTRALIANS' OPTIMISM

70% Australians feel optimistic about the future personally (up 6 pp from Nov)

55% Australians feel optimistic about Australia's future (up 2 pp from Nov)

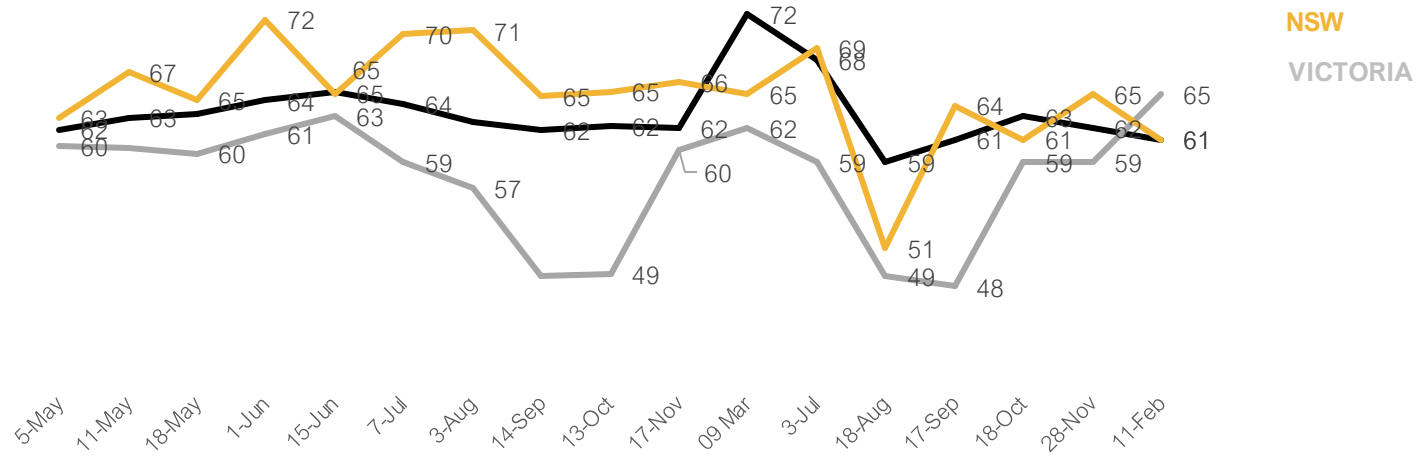
A 'BETTER' NORMAL FOR MYSELF GOING FORWARD

44% Of Australians see a 'better' normal for themselves (up 10pp from Nov), 22% don't, 34% are unsure

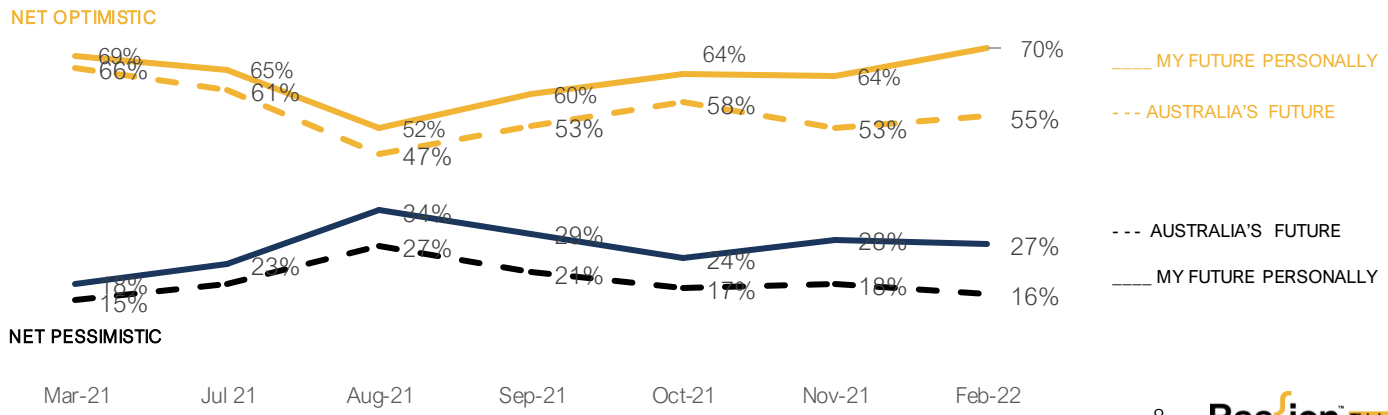
While Omicron wreaked havoc with most Australians lives over the summer period, life satisfaction remains relatively stable, and personal optimism has increased. But as a nation, our optimism remains low. With the last two years, being about survival and getting through the pandemic it is now time to start focusing on the future and how as a nation we will thrive. Our next special report will examine how Australians perceive us compared to other nations today and compare the results to pre-pandemic figures.

LIFE SATISFACTION

SATISFIED



FEELING OPTIMISTIC ABOUT THE FUTURE



Bastion Think wide

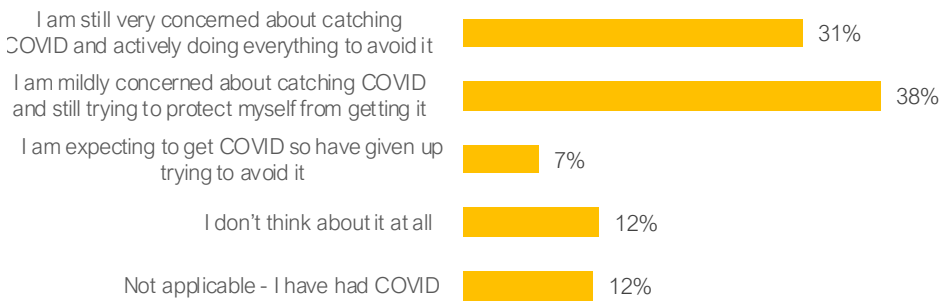
COVID EXPOSURE CONCERNS

CONCERN ABOUT EXPOSURE TO COVID-19

As Omicron infected more and more Australians, there were stories people were no longer trying to avoid COVID and some actively seeking out infection. However, this remains a small portion of Australians, with only 7% of Australians having given up trying to avoid it, and 12% claiming to not even think about it. Just under 1 in 3, remaining very concerned and actively trying to avoid it and 38% mildly concerned.

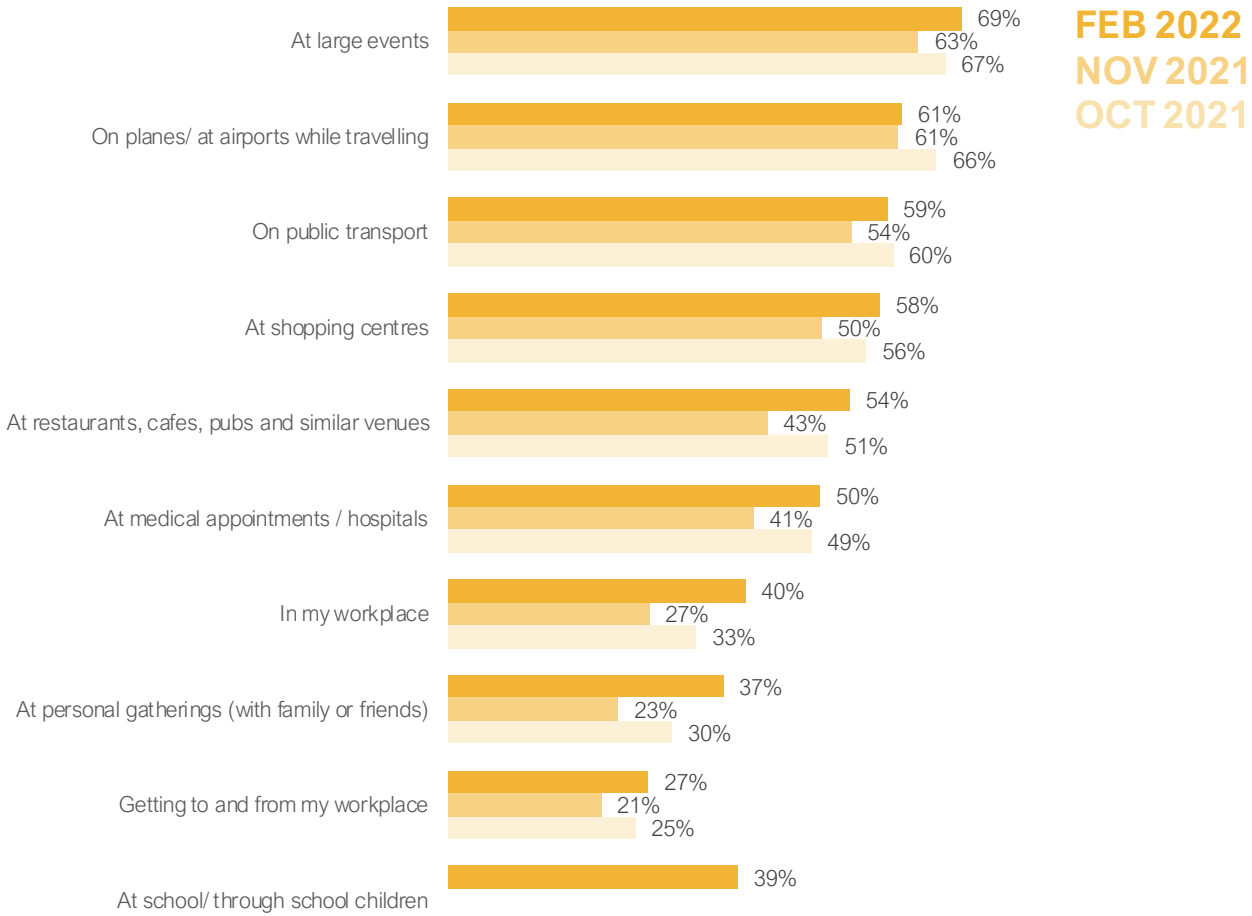
Concern overexposure to COVID has returned to levels seen in October 2021 when restrictions were yet to be lifted. At larger events (69%) while travelling on planes and at airports (61%), on public transport (59%) and at shopping centres (58%) remains the highest perceived risk. Workplaces (40%) are also perceived as high risk for many, and therefore return to office plans need to be conscious of this level of concern.

LEVEL OF CONCERN ABOUT CATCHING COVID-19
(AMONGST THOSE WHO HAVE NOT HAD COVID)



Omicron heightened Australians concerns about contracting COVID, and their concerns about exposure in various situations. With 12% of the population having now contracted COVID, most Australians (69%) remain somewhat vigilant to avoid infection.

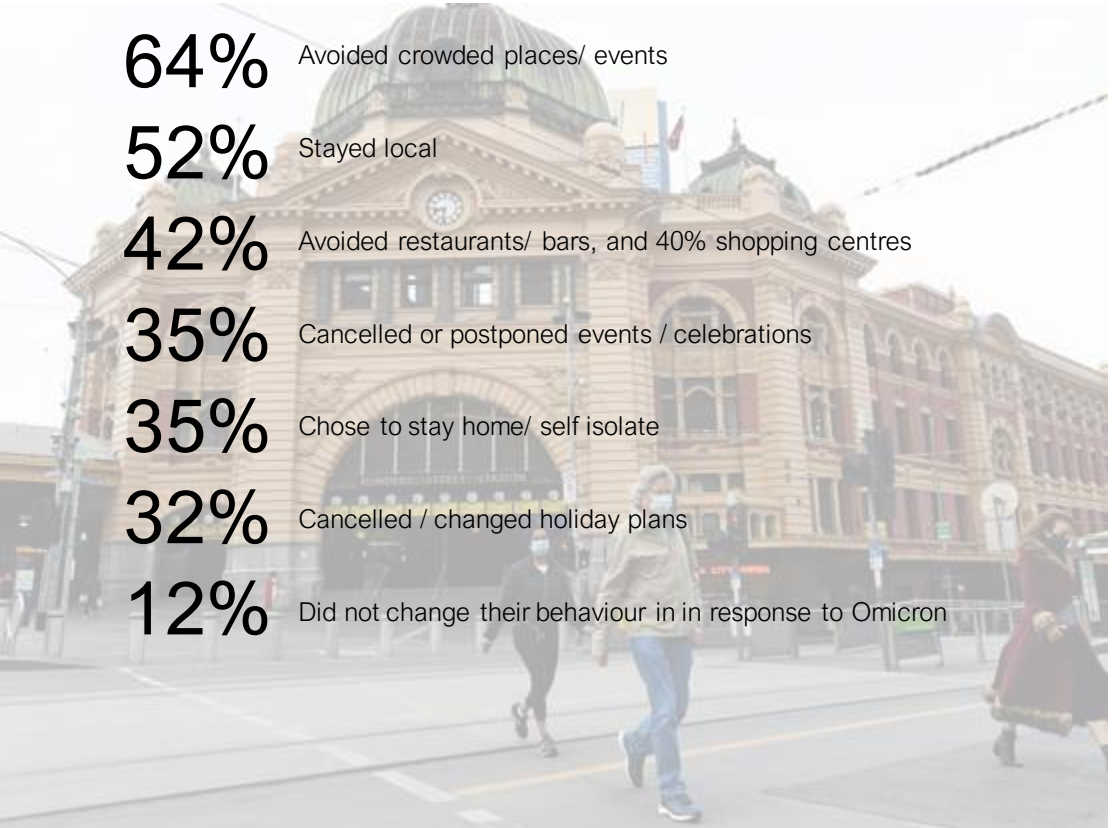
LEVEL OF CONCERN ABOUT EXPOSURE TO COVID-19
(CONCERNED / EXTREMELY CONCERNED)



REPSONSE TO OMICRON OUTBREAK

OMICRON IMPACT ON BEHAVIOUR

Omicron turned Australia's summer break into a very different one from what was expected in November last year. 88% of Australians claimed Omicron impact their behaviour in some way with many choosing to self-isolate (35%), 20% forced to self isolated due to infections (self or HH), others choosing to avoid 'risky' situations and



64% Avoided crowded places/ events

52% Stayed local

42% Avoided restaurants/ bars, and 40% shopping centres

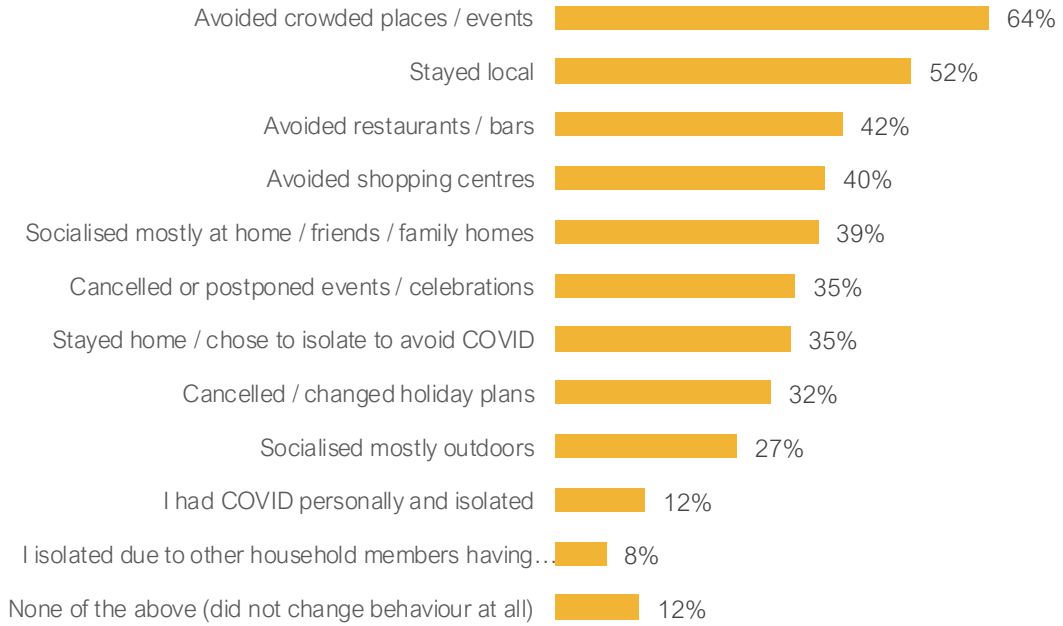
35% Cancelled or postponed events / celebrations

35% Chose to stay home/ self isolate

32% Cancelled / changed holiday plans

12% Did not change their behaviour in in response to Omicron

RESPONSE TO OMICRON OUTBREAK



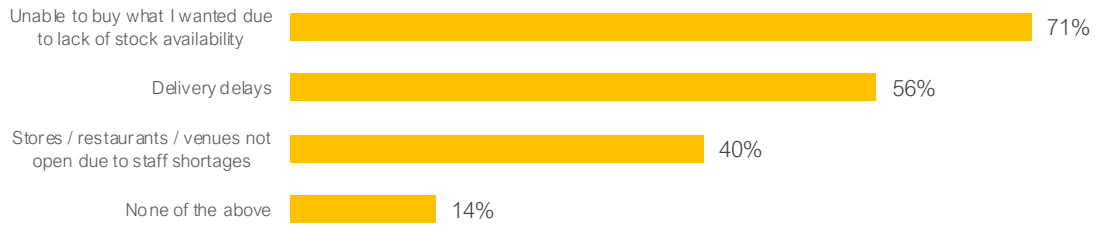
Adapting to the New Normal

RESPONSE TO OMICRON OUTBREAK

71% Could not buy products they wanted due to availability issues

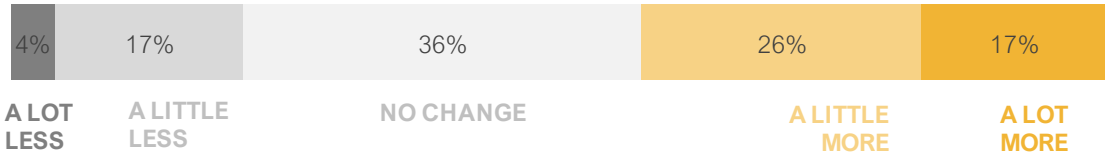
FLOW ON EFFECTS EXPERIENCED OVER THE LAST MONTH

The flow-on impact of Omicron to business was also felt by most Australians with 71% experiencing product availability issues, 56% delivery delays and 40% impacted by staff shortages in hospitality.



Despite the flow-on impacts on purchasing, delivery and travel, 42% of Australians spent more money than expected over the summer period. Whether that was to make up for the fact they didn't or couldn't go on holiday and so they splurged in other things. On the other side of the coin there were 21% of Australians who spent less than they expected, while 36% say it there was no change from their expected spending.

OMICRON'S IMPACT ON EXPECTED SPENDING OVER SUMMER PERIOD



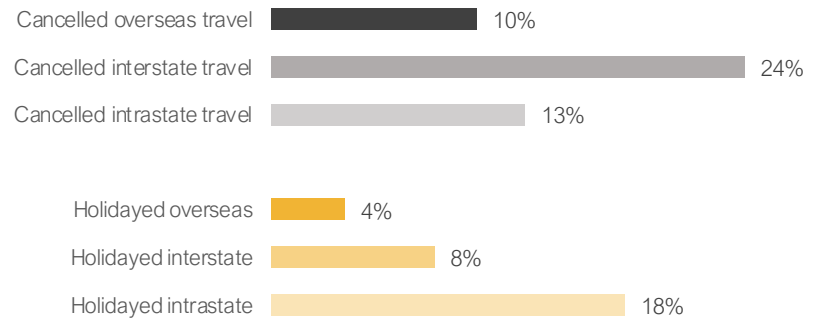
TRAVEL BEHAVIOUR OVER CHRISTMAS / SUMMER PERIOD

One can only wonder how the travel and hospitality business continues to survive, with Omicron wreaking havoc with what is traditionally the busiest time of year for these businesses. Over 1 in 3 Australians (34%) cancelled some travel plans over the summer period, while 28% Australians had some form of holiday.

Interstate tourism was the biggest loser with only 8% of Australians holidaying interstate while 24% cancelled their plans for interstate travel. While just 4% of Australians travelled overseas, 10% cancelled plans to do so. But interstate tourism gained some of the losses, with 18% of Australians holidaying in their home state, but another 13% cancelled their travel plans within their home state.

34% Australians cancelled travel plans over the summer period

28% Australians had a holiday during the Christmas / summer period



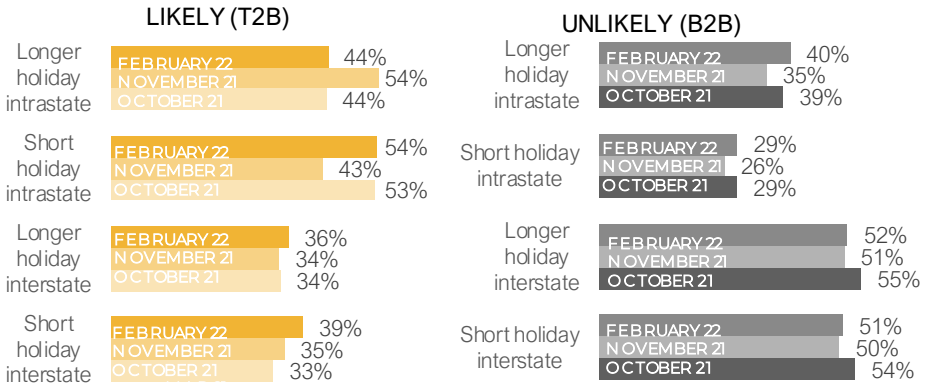
TRAVEL AND HOLIDAYS

TRAVEL INTENTIONS REMAIN UNCHANGED

This wave travel intentions show some increase from the last wave with almost 1 in 2 Australians (47%) intending to travel interstate the next 3 months (up from 43% in Nov, clearly. Result of pent-up demand due to cancellations and postponements as a result of Omicron.

When it comes to overseas travel - 21% of Aussies are ready to jump on a plane in the next 3 months, while 40% of Australians hope to travel OS in the next 12 months.

TRAVEL INTENTIONS NEXT 3 MONTHS (WHEN RESTRICTIONS ALLOW)

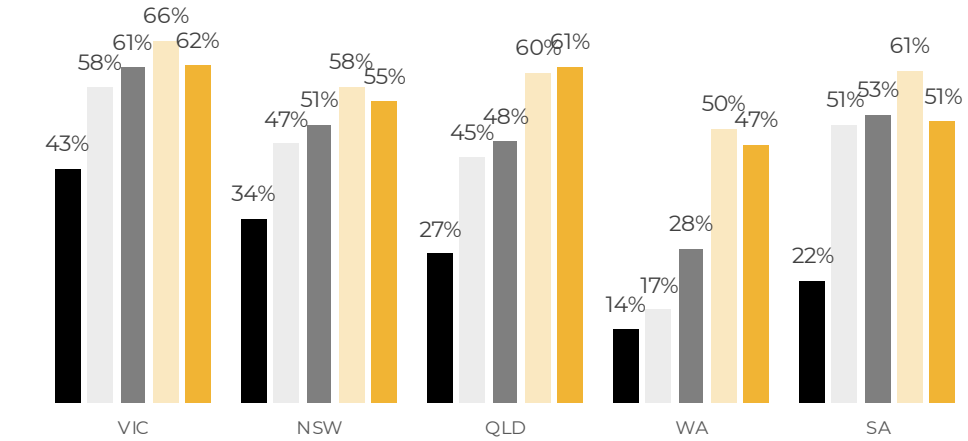


With 24% of Australians cancelling or postponing interstate travel plans over the summer break, there is pent-up demand, and almost 1 in 2 Australians are now planning interstate holidays within the next 3 months. Consideration to travel to NSW and VIC has shown increases this wave.

INTENTION TO TRAVEL INTERSTATE AND INTRASTATE NEXT 12M BY STATE OF RESIDENCE

(LIKELY + VERY LIKELY)

OVERSEAS

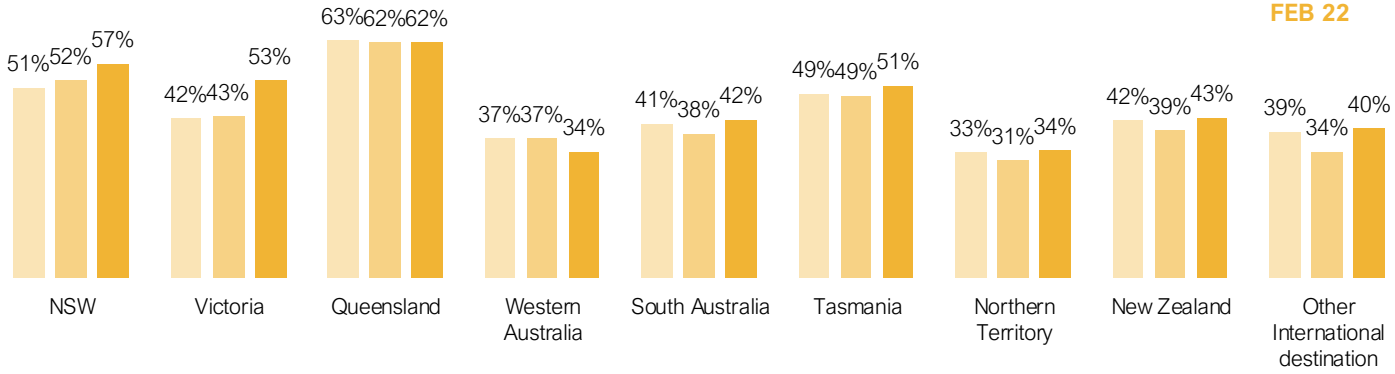


Intention to travel within their home state is consistent across residents of all states.

Consideration to travel to overseas is most prevalent in VIC & NSW and lowest in WA

CONSIDER TRAVEL NEXT 12M TO...

(LIKELY + VERY LIKELY)



IMPACT & COMMUNITY SENTIMENT

COVID ONGOING IMPACT ON LIFE

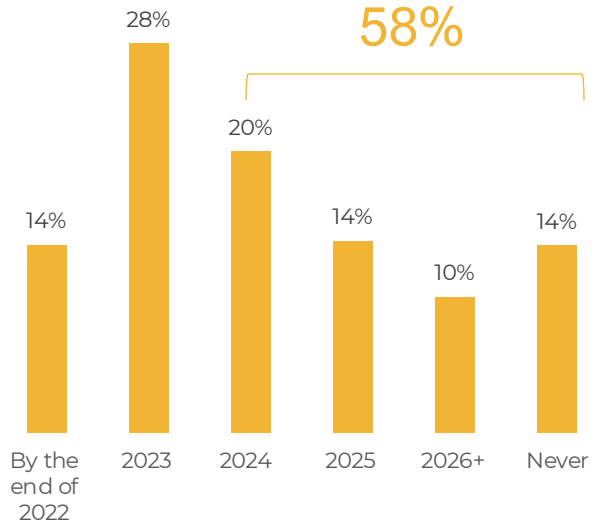
Most Australians (58%) now believe COVID will have a significant impact for at least 2 more years, while almost 14% believe COVID is here to stay (down from 19% in Nov).

Younger people are more optimistic with 51% believing by 2023 COVID will no longer be significantly impacting our lives (compared with 38% for those 30+years). QLD residents are the most negative with 1 in 5 believing COVID is here to stay.

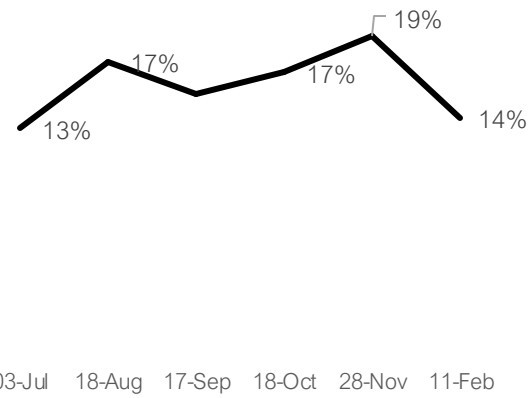
EXPECTATIONS FOR 2022

Significant price rises to top the list of expectations for 2022 (84%) and almost 4 in 5 expecting interest rate rises as well. (77%). Along with this, most Australians are preparing for a continuation of the bumpy ride experienced over the last 2 years with ongoing disruptions to events (78%), product shortages (76%) and significant staff shortages (71%). But it's not all gloomy, with 61% expecting a return to overseas travel and 53% seeing a return to 'normal' education (higher for parents of primary school children than secondary school children). While 1 in 2 Australians expect a return to 'normal' shopping behaviour.

PERCEPTIONS OF WHEN COVID WILL NO LONGER HAVE SIGNIFICANT IMPACT



% WHO BELIEVE COVID WILL NEVER END



EXPECTATIONS FOR AUSTRALIA 2022

(SOMEWHAT LIKELY / EXTREMELY LIKELY)



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