



NSW Community Pulse – Autumn March, 2020

Prepared by: Micromex Research
Date: March 2020

Background



Background to Research

In February 2020, Micromex undertook research with our online Panel to provide a benchmark understanding of the NSW community's attitudes on a range of topics, including, but not exclusively, environmental and climate change-related issues (see separate report 'NSW Community Pulse: Long Hot Summer – 2020').

Little did we know that just one month later the world would significantly change due to the COVID-19 pandemic and the accompanying economic, social and health related implications. So we have engaged with our online Panel again – and the result is this report, 'NSW Community Pulse: Autumn March, 2020'. The earlier February 2020 Community Pulse acts as a baseline with which we can identify any shifts in community perceptions.

Micromex usually provides analysis and summaries of the key findings of the research we conduct, to help organisations interpret the data we collect. However, for these proprietary 'Pulse' surveys we are sharing with our clients, we have taken the decision to invite individuals and organisations to evaluate the results and draw their own independent conclusions, based on their own circumstances.

One arguably universal/topical observation is that our community's well-being and quality of life has been under strain for a significant period, and that they want to be talking and planning around a Post CV-19 future.

Methodology

What?

- The NSW Community Pulse is a periodical Micromex Research Survey conducted with our online Panel to identify community concerns and explore attitudes towards topical subject areas

Why?

- Measure levels of concern across a range of community issues and identify how concerns have changed since the introduction of restrictions relating to COVID-19.
- Identify how NSW residents are currently being impacted by COVID-19, and perceptions of future impacts.
- Understand how residents are receiving information on COVID-19.
- Identify household size if isolation/lock-downs are required and residents that would have no daily face-to-face contact with another person.

How?

- A total of N=1,728 respondents participated from Micromex's NSW online panel.

When?

- The survey was emailed to participants and available for completion between 27th – 31st March 2020.

Base: N = 1,728

Sample Profile

Sample is weighted gender, age and degree level education to match the 2016 ABS profile of NSW

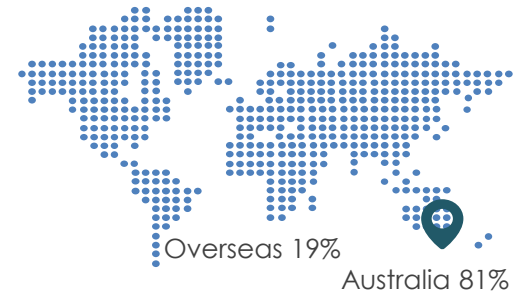
Gender



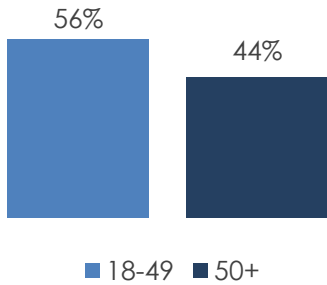
Location



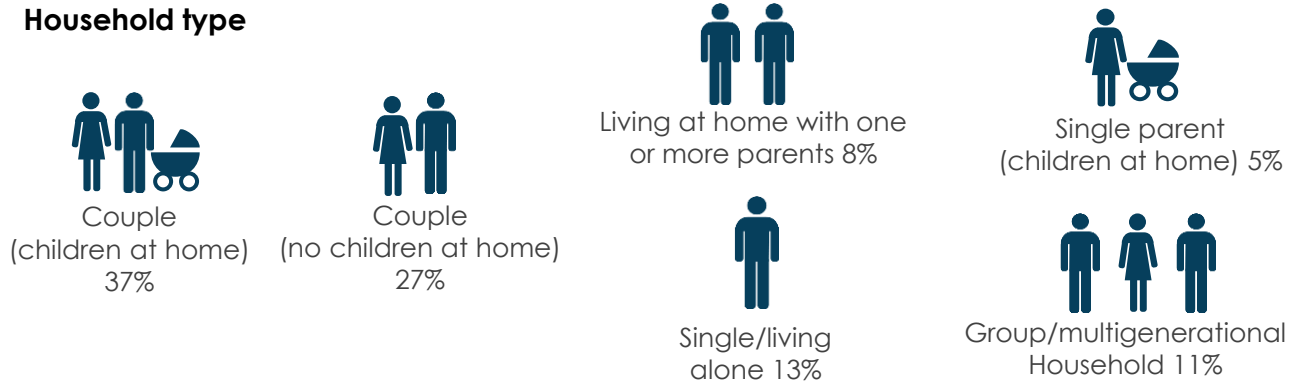
Country of birth



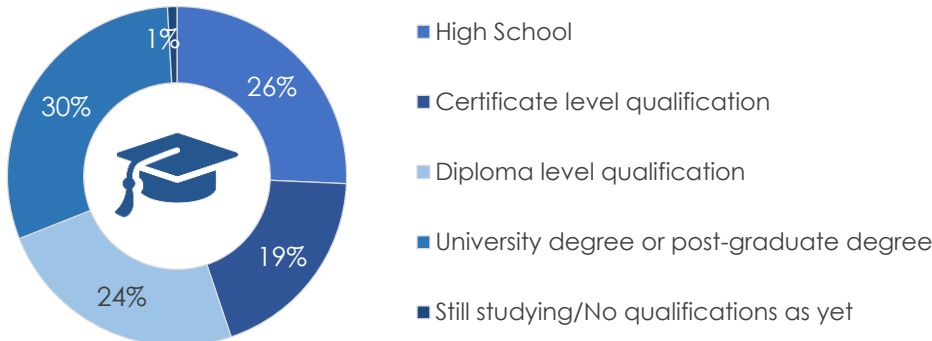
Age



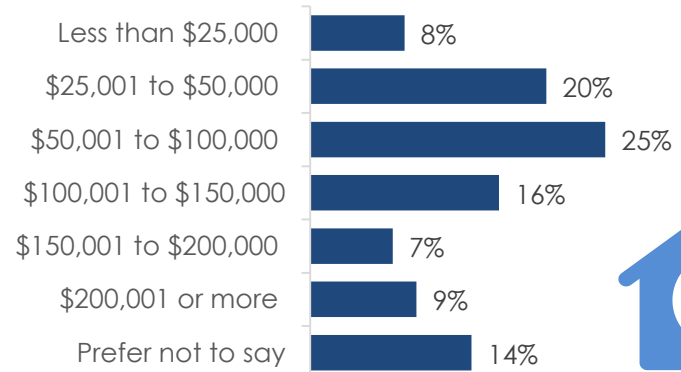
Household type



Education



Household income



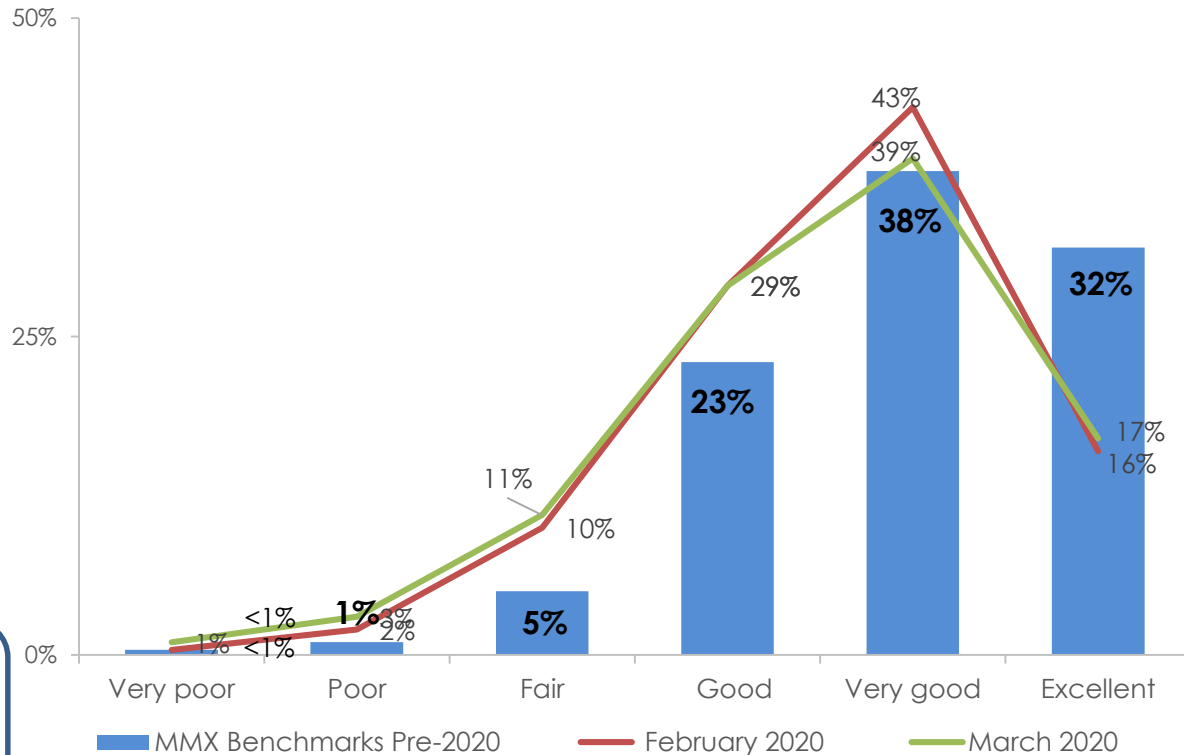
Findings



Quality of Life

Q6. Thinking about your life and personal circumstances, overall, how would you rate your quality of life?

| | March 2020 | February 2020 | MMX Benchmark | Male | Female | Under 50 | 50+ | Metro | Regional | Employed | Not employed | Households with children |
|-----------------------|------------|---------------|---------------|------|--------|----------|------|-------|----------|----------|--------------|--------------------------|
| Very good - Excellent | 56% | 59% | 70% | 55% | 57% | 48% | 66%▲ | 54% | 58% | 58% | 53% | 51% |



The Micromex Quality of Life benchmark is based on 11,700 responses for multiple Councils since 2016

Base: N=1,728

▲ ▼ = A significantly higher/lower percentage (by group)

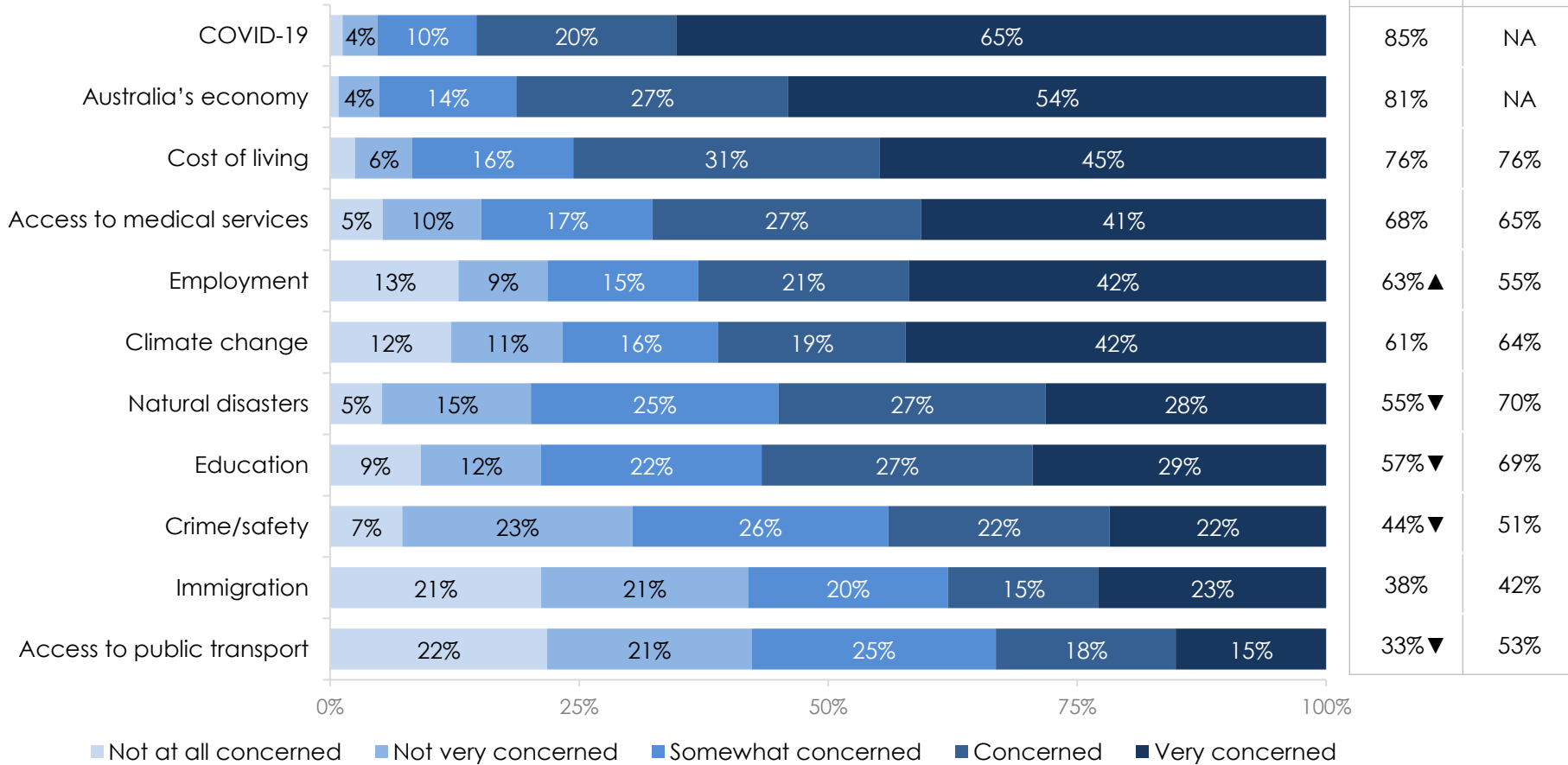
It has been a rocky six months for NSW residents.

Compared to pre-fire/flood/virus benchmarks a significantly lower percentage of resident feel their quality of life is excellent.

Personally Concerned

**% Concerned/
Very Concerned**

Mar 20 Feb 20



Note: percentages less than 3% are not shown in the chart above
 Note: Concern for COVID-19 and Australia's economy were not asked in the February Wave

Base: March N=1,728, February N=1,786

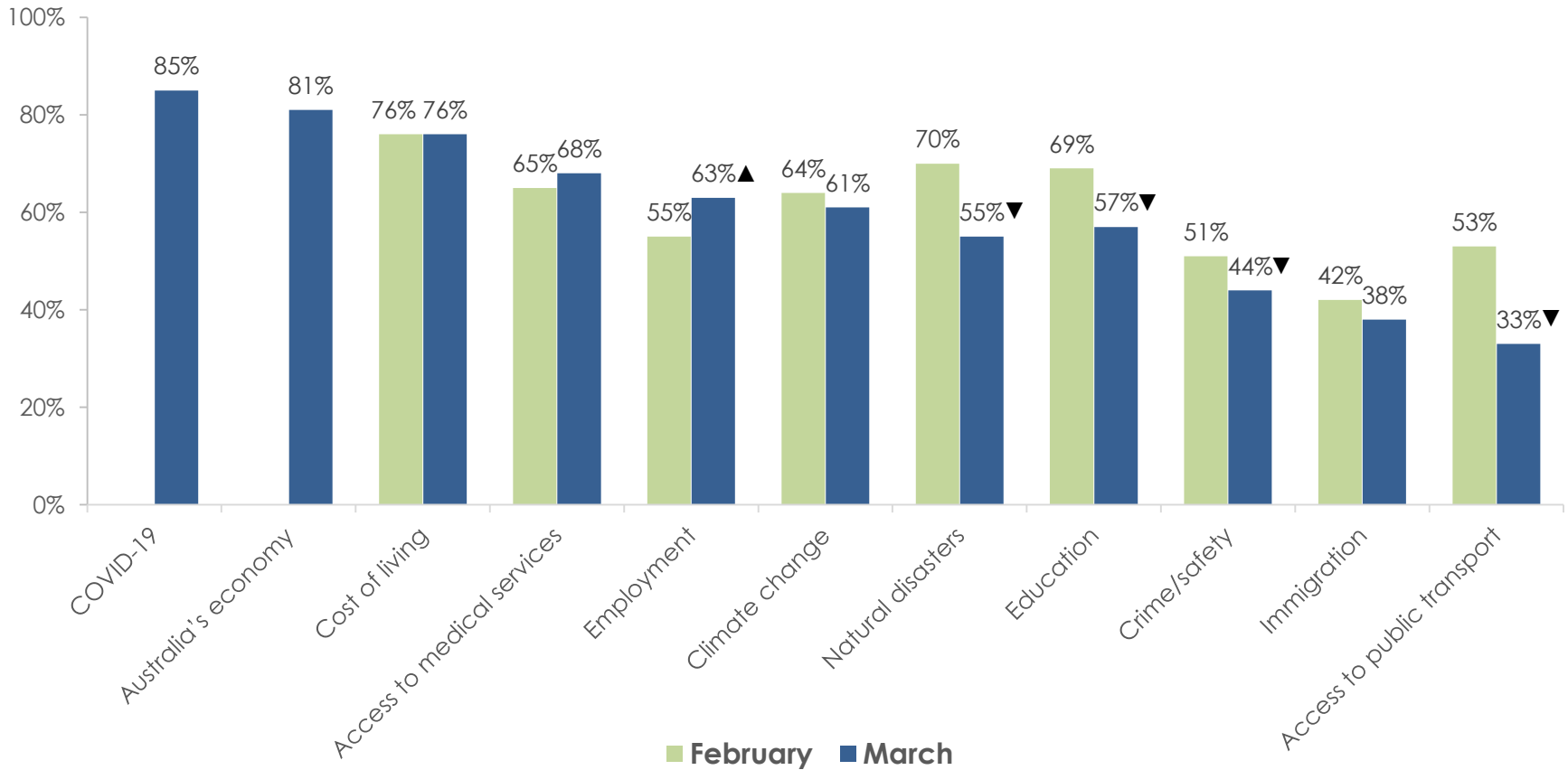
▲ ▼ = A significantly higher/lower level of concern (compared to Feb 20)

As expected, COVID-19 and Australia's economy are the top areas of concern for NSW residents.

Personally Concerned

Q1. How concerned are you personally about the following?

Proportion of residents that stated they were concerned/very concerned



Note: Concern for COVID-19 and Australia's economy were not asked in the February Wave

Base: March N=1,728, February N=1,786

▲ ▼ = A significantly higher/lower level of concern (compared to Feb 20)

Whilst level of concern for some areas has diminished, residents are still able to consider categories beyond COVID-19, with concern for cost of living and climate change remaining consistent with February data. Access to medical services has also remained consistent - public transport is significantly down

Personally Concerned

Q1. How concerned are you personally about the following?

| | Overall | Male | Female | Under 50 | 50+ | Metro | Regional | Employed | Not employed | Households with children |
|----------------------------|---------|------|--------|----------|------|-------|----------|----------|--------------|--------------------------|
| COVID-19 | 85% | 81% | 90%▲ | 84% | 87% | 85% | 86% | 85% | 86% | 84% |
| Australia's economy | 81% | 77% | 85%▲ | 82% | 80% | 81% | 81% | 80% | 82% | 81% |
| Cost of living | 76% | 71% | 80%▲ | 85%▲ | 64% | 74% | 77% | 79%▲ | 71% | 79%▲ |
| Access to medical services | 68% | 63% | 73%▲ | 72%▲ | 63% | 66% | 70% | 67% | 68% | 66% |
| Employment | 63% | 57% | 69%▲ | 71%▲ | 54% | 64% | 63% | 66% | 60% | 67%▲ |
| Climate change | 61% | 58% | 64% | 63% | 59% | 64% | 58% | 62% | 60% | 60% |
| Natural disasters | 55% | 48% | 61%▲ | 52% | 58%▲ | 52% | 58% | 50% | 60%▲ | 51% |
| Education | 57% | 54% | 59% | 56% | 57% | 56% | 58% | 55% | 59% | 62%▲ |
| Crime/safety | 44% | 38% | 49%▲ | 41% | 48%▲ | 40% | 49%▲ | 39% | 50%▲ | 40%▼ |
| Immigration | 38% | 39% | 37% | 30% | 47%▲ | 37% | 39% | 32% | 45%▲ | 34%▼ |
| Access to public transport | 33% | 30% | 36% | 31% | 36%▲ | 37%▲ | 28% | 28% | 39%▲ | 27%▼ |

Base: N=1,728

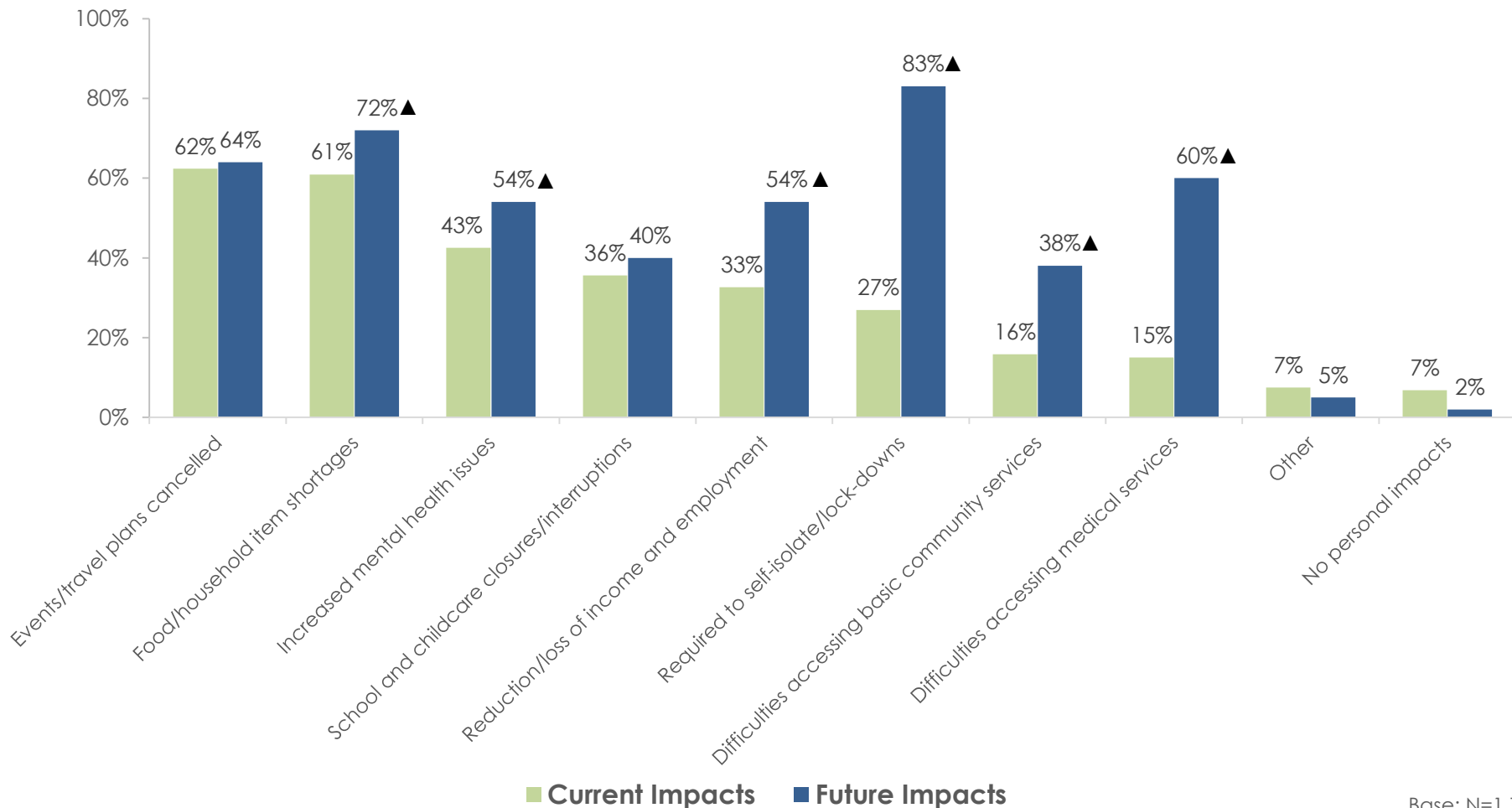
▲ ▼ = A significantly higher/lower level of concern (by group)

Females and residents aged under 50 have higher levels of concern around the health and economic aspects

Current and Future Impacts

Q3a. At the moment we understand that our community is facing significant uncertainty – please indicate which of the following things, if any, are currently negatively impacting on your quality of life?

Q3b. How, if at all, do you think you personally may be impacted by COVID-19 in the future?



Base: N=1,728

▲ ▼ = A significantly higher/lower percentage (by group)

All have been impacted or expect to be in some way, shape or form.

43% of NSW residents already have experienced increased mental health issues. This incidence is expected to increase.

Current Impacts

Q3a. At the moment we understand that our community is facing significant uncertainty – please indicate which of the following things, if any, are currently negatively impacting on your quality of life?

| | Overall | Male | Female | Under 50 | 50+ | Metro | Regional | Employed | Not employed | Households with children |
|---|---------|------|--------|----------|------|-------|----------|----------|--------------|--------------------------|
| Had events/travel plans cancelled | 62% | 61% | 64% | 67%▲ | 57% | 62% | 63% | 67%▲ | 57% | 66% |
| Experienced food/household item shortages | 61% | 57% | 65%▲ | 68%▲ | 52% | 62% | 60% | 64%▲ | 57% | 69%▲ |
| Increased mental health issues, such as stress and anxiety | 43% | 33% | 52%▲ | 57%▲ | 25% | 44% | 41% | 50%▲ | 34% | 52%▲ |
| School and childcare closures/interruptions | 36% | 29% | 42%▲ | 53%▲ | 14% | 37% | 35% | 47%▲ | 22% | 67%▲ |
| Reduction/loss of income and employment | 33% | 30% | 35% | 41%▲ | 22% | 32% | 33% | 37%▲ | 27% | 41%▲ |
| Been required to self-isolate as a precaution | 27% | 25% | 29% | 27% | 27% | 30%▲ | 23% | 22% | 33%▲ | 22% |
| Had difficulties accessing basic community services (e.g. Centrelink) | 16% | 13% | 18% | 22%▲ | 8% | 16% | 15% | 12% | 20%▲ | 17% |
| Had difficulties accessing medical services | 15% | 14% | 17% | 20%▲ | 9% | 13% | 17% | 15% | 15% | 16% |
| Other | 7% | 6% | 9% | 8% | 6% | 8% | 7% | 8% | 7% | 7% |
| Have not been personally impacted | 7% | 9%▲ | 5% | 2% | 13%▲ | 6% | 8% | 4% | 10%▲ | 3% |

Base: N=1,728

▲ ▼ = A significantly higher/lower percentage (by group)

The younger age group (under 50), females, employed residents and households with children are more likely to have been impacted by COVID-19, including stating they have experienced increased mental health issues.

Future Impacts

Q3b. How, if at all, do you think you personally may be impacted by COVID-19 in the future?

| | Overall | Male | Female | Under 50 | 50+ | Metro | Regional | Employed | Not employed | Households with children |
|--|---------|------|--------|----------|-----|-------|----------|----------|--------------|--------------------------|
| Isolation/lock-downs | 83% | 83% | 82% | 85%▲ | 80% | 83% | 83% | 86%▲ | 78% | 84% |
| Food and household item shortages | 72% | 69% | 75%▲ | 78%▲ | 64% | 73% | 70% | 75%▲ | 68% | 78%▲ |
| Cancellation of events/travel plans | 64% | 65% | 63% | 68%▲ | 58% | 64% | 64% | 67%▲ | 60% | 68%▲ |
| Difficulties accessing medical services | 60% | 55% | 65%▲ | 66%▲ | 54% | 59% | 62% | 63% | 58% | 63% |
| Reduction/loss of income and employment | 54% | 50% | 58%▲ | 69%▲ | 36% | 55% | 53% | 68%▲ | 38% | 65%▲ |
| Mental health impacts, such as stress and anxiety | 54% | 46% | 61%▲ | 68%▲ | 36% | 54% | 54% | 61%▲ | 45% | 61%▲ |
| Closures/interruptions to schools and childcare facilities | 40% | 34% | 45%▲ | 59%▲ | 16% | 40% | 40% | 52%▲ | 25% | 70%▲ |
| Difficulties accessing basic community services | 38% | 35% | 41% | 46%▲ | 28% | 37% | 39% | 40% | 35% | 41% |
| Other | 5% | 4% | 6% | 5% | 5% | 5% | 6% | 4% | 6% | 3% |
| Do not believe I will be personally impacted | 2% | 2% | 1% | 0% | 4%▲ | 2% | 2% | 1% | 3%▲ | 1% |

Base: N=1,728

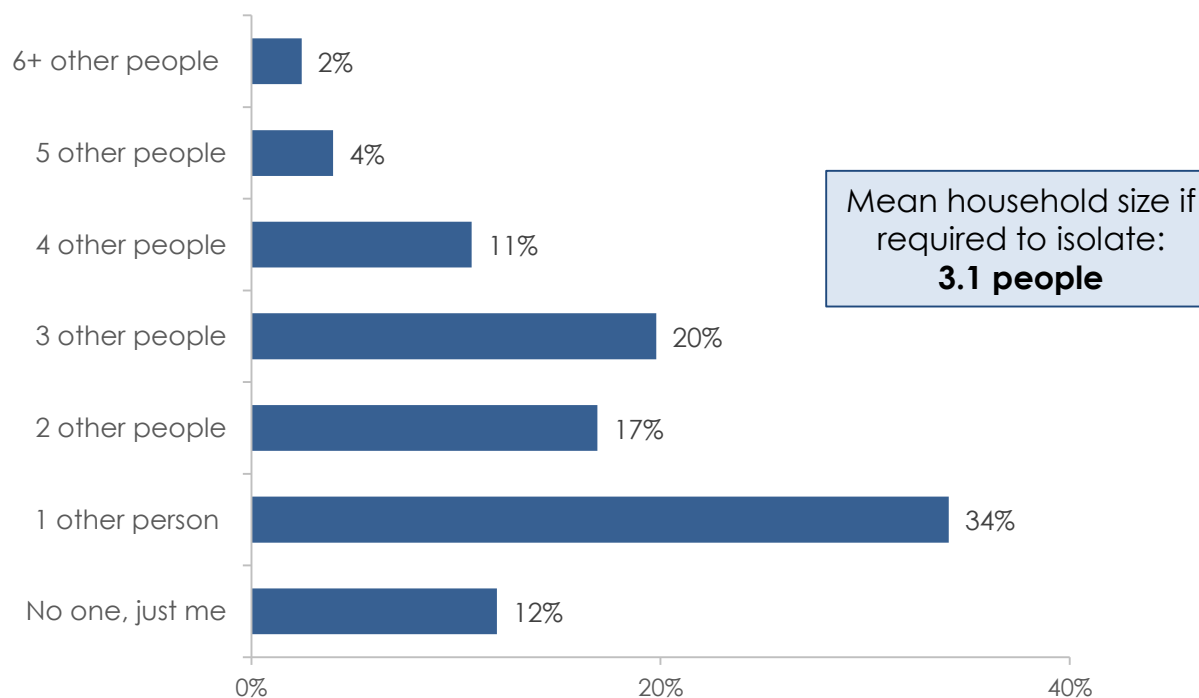
▲ ▼ = A significantly higher/lower percentage (by group)

The same demographic of residents that are currently more likely to be impacted by COVID-19 (aged under 50, employed and households with children), are also more likely to believe they will experience negative impacts in the future.

Household size and Isolation

Q4. If you are required to stay at home/isolate, how many other people would be living with you that you would have face-to-face contact with each day?

| | Overall | Male | Female | Under 50 | 50+ | Metro | Regional | Employed | Not employed | Households with children |
|-----------------|---------|------|--------|----------|------|-------|----------|----------|--------------|--------------------------|
| No one, just me | 12% | 11% | 13% | 5% | 21%▲ | 12% | 12% | 6% | 19%▲ | <1% |



Base: N=1,728

▲ ▼ = A significantly higher/lower percentage (by group)

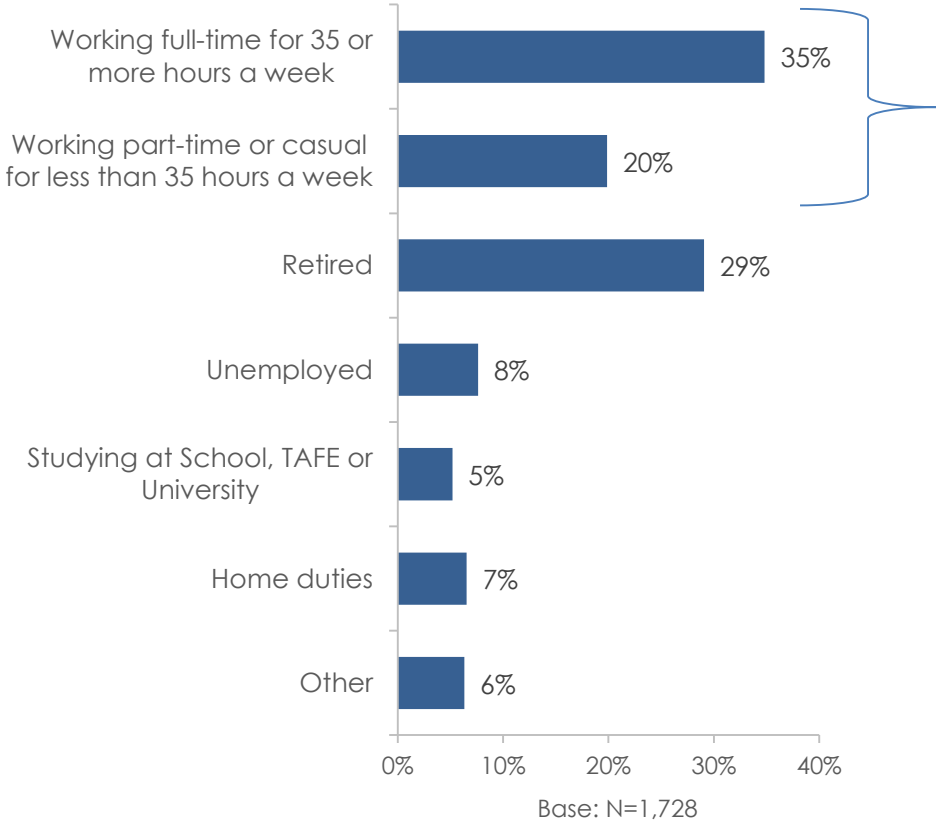
12% of NSW residents would isolate on their own, with no daily face-to-face contact with another person. Residents most likely to isolate on their own are aged 50+ and not be currently employed.

Impact on Employment

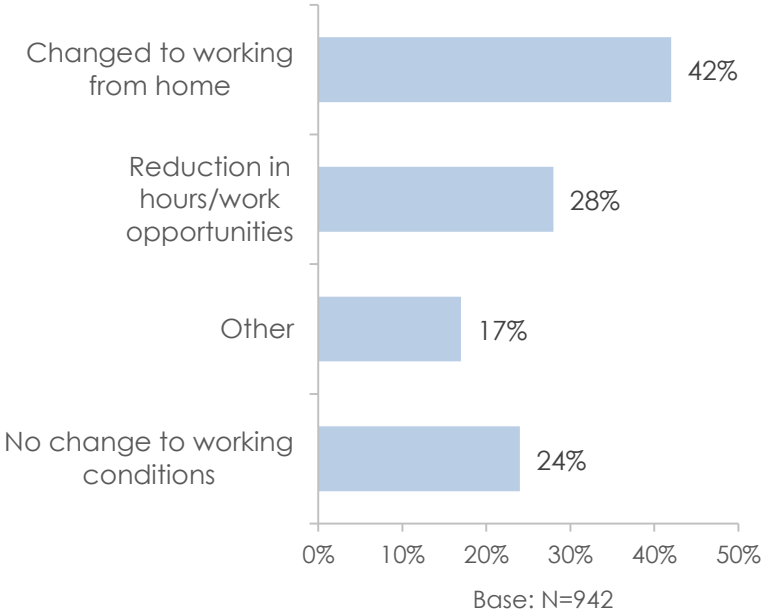
Q7a. What is your current work status (select all that apply)?

Q7b. (If employed) Have your work conditions been impacted by COVID-19?

Employment status



Impact on work conditions



76% of employed residents have had their work impacted in some way by COVID-19.



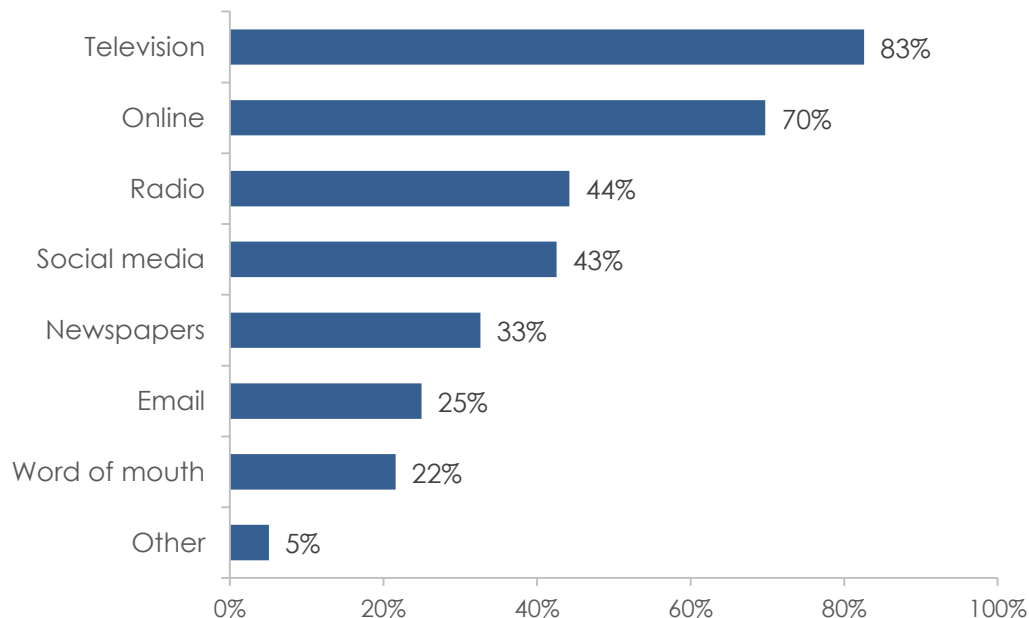
Sources of Information

Q8. Where are you currently getting your information on COVID-19?

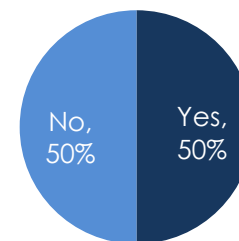
Q9. Are you checking the following websites for COVID-19 information?

| | Overall | Male | Female | Under 50 | 50+ | Metro | Regional | Employed | Not employed | Households with children |
|---------------|---------|------|--------|----------|------|-------|----------|----------|--------------|--------------------------|
| Television | 83% | 81% | 84% | 76% | 91%▲ | 83% | 83% | 77% | 89%▲ | 79% |
| Online | 70% | 68% | 72% | 80%▲ | 57% | 72% | 68% | 75%▲ | 64% | 75%▲ |
| Radio | 44% | 50%▲ | 39% | 35% | 55%▲ | 45% | 43% | 41% | 49%▲ | 40% |
| Social media | 43% | 37% | 48%▲ | 54%▲ | 28% | 44% | 41% | 47%▲ | 37% | 48%▲ |
| Newspapers | 33% | 35% | 30% | 26% | 42%▲ | 36%▲ | 28% | 28% | 38%▲ | 27% |
| Email | 25% | 25% | 25% | 22% | 29%▲ | 26% | 23% | 24% | 26% | 23% |
| Word of mouth | 22% | 22% | 22% | 28%▲ | 14% | 25%▲ | 18% | 24%▲ | 18% | 21% |

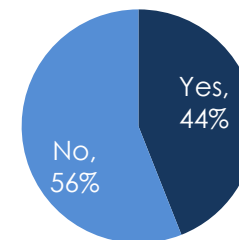
▲ ▼ = A significantly higher/lower percentage (by group)



Checking the Health NSW website



Checking the NSW Government website



Base: N=1,728

Television and online are the most common ways that residents are getting information about COVID-19.

Role Of Local Government



Primary Responsibilities of Local Governments

Q10c. What, if anything, do you believe is the primary responsibility that your local government has during this period?

'Practical support and communication'

'Working to check that local people and businesses are abiding by the regulations'

'Ensure that the elderly and those in isolation get the support they need'

'Community services like meals on wheels and mobile libraries'



'Support local health services and continue council services like garbage collection'

'Continue to provide the services they can without violating social distancing rules'

'Reducing stress by removing parking fees and having flexible payment options for rates'

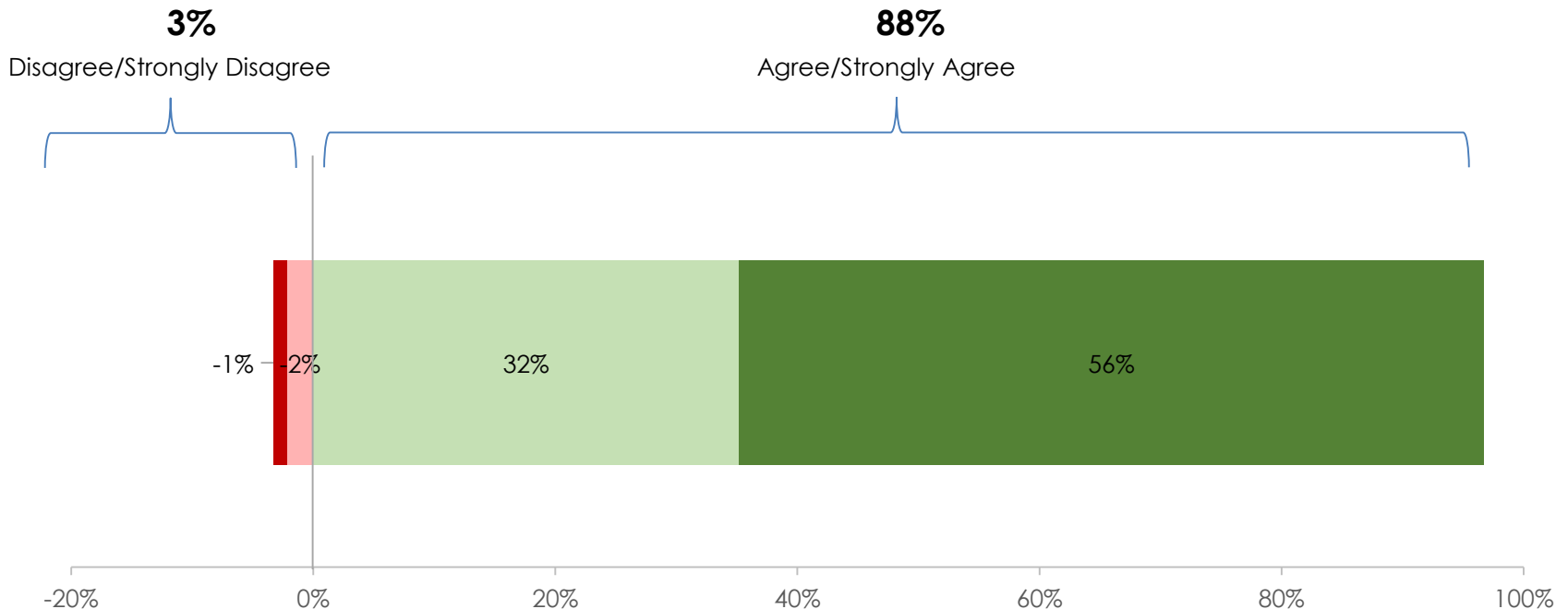
'Maintain the cleanliness and functionality of our LGA'

NSW residents believe that the primary responsibilities of local governments are to support local businesses and community members during this period, particularly the elderly and vulnerable.

Engagement and Planning for the Future

Q. To what extent do you agree or disagree with the statement, 'despite the current crisis, I believe that it is important for my local government to plan and engage with the community regarding future needs'?

| | Overall | Male | Female | Under 50 | 50+ | Metro | Regional | Employed | Not employed | Households with children |
|----------------------|---------|------|--------|----------|-----|-------|----------|----------|--------------|--------------------------|
| Agree/strongly agree | 88% | 87% | 89% | 90% | 86% | 87% | 90% | 89% | 87% | 88% |



Base: N=1,728

88% of NSW residents agree/strongly agree that it is important for local governments to plan and engage with the community regarding future needs.
Agreement is relatively consistent across all demographics.



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research

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