



**THERE ARE OVER
25 MILLION PEOPLE
IN AUSTRALIA...**

**FIND OUT
WHAT THEY'RE
THINKING.**

TRUE ISSUES®

NOVEMBER 2020



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Survey methodology



National Online Survey

n=1,035 Australian adults

- Conducted Friday 20th – Sunday 22nd November 2020.
- Sample quotas on age, gender and location, with post-survey weighting to actual age / gender / location proportions from 2016 Census.
- Maximum margin of error on n=1,035 is +/-3.0% at the 95% confidence level.
- Differences of +/-1% for net scores are due to rounding.

Explanation of index scores:

To facilitate ease of reporting and comparison of results over time, an **index score** has been calculated for performance measures (*very good* to *very poor* ratings).

The index score is represented as a score out of 100.

To calculate this score, the **survey percentage result** for each scale category (excluding 'don't know' responses) is multiplied by an **index factor** to produce an **index value** for each category. These values are then summed to produce the **index score**, equating to 43 in this example.

Rating category	Survey percentage	Index factor	Index value (percentage x factor)
<i>Very good</i>	5%	100	5
<i>Good</i>	17%	75	13
<i>Average</i>	40%	50	20
<i>Poor</i>	19%	25	5
<i>Very poor</i>	15%	0	0
<i>Don't know</i>	4%	-	-
Index score			43



**What are the
issues
Australians care
about?**

As the COVID-19 global pandemic continues, healthcare, the economy and employment remain top of mind concerns

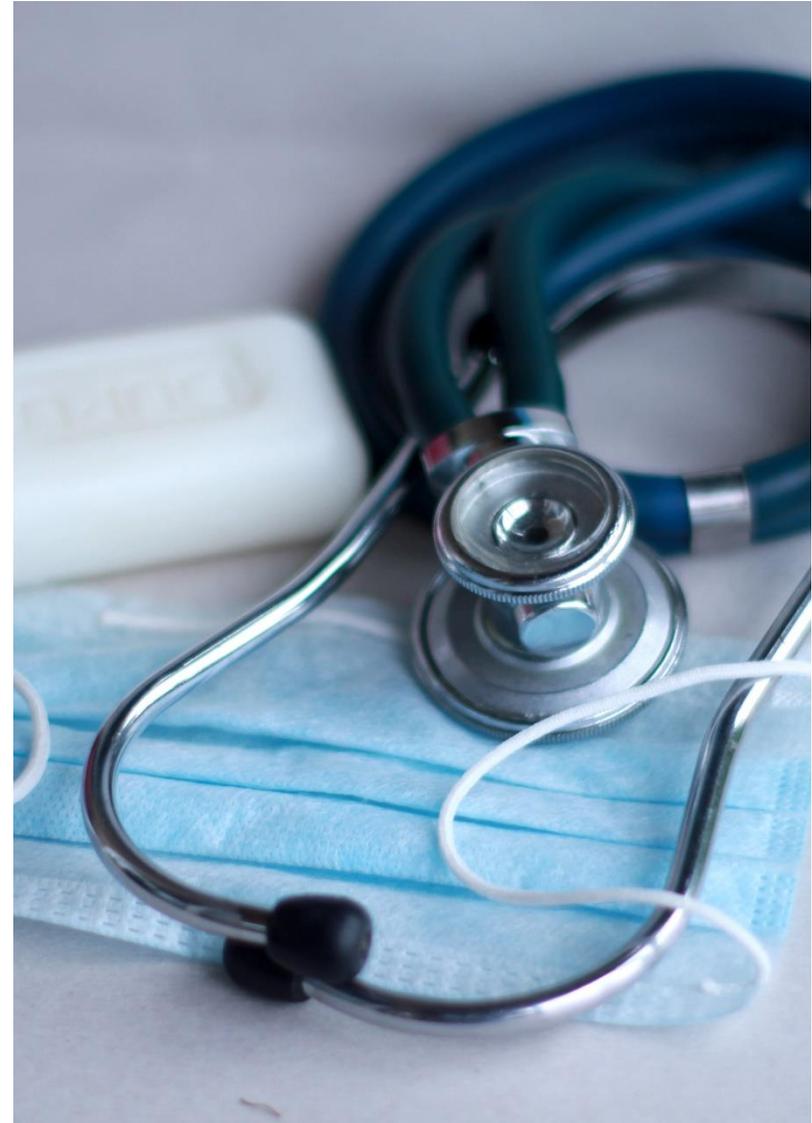


When asked to name up to three issues that personally interest or concern them the most, that the Australian Government should focus on, four in ten Australians (42%) describe issues related to hospitals, healthcare and ageing. Three in ten describe issues related to the economy and finances (32%), or employment and wages (32%).

In November 2020, as Victoria's second wave of COVID-19 comes to an end, and more state borders begin to re-open, Australians remain concerned for their own health and finances, as well as the broader healthcare system and national and state / territory economies.

Their thoughts turn to a COVID-19 vaccine, controlling future outbreaks, safely managing the movement of people across state and international borders, and the long process of recovery for our local, state / territory and national economies.

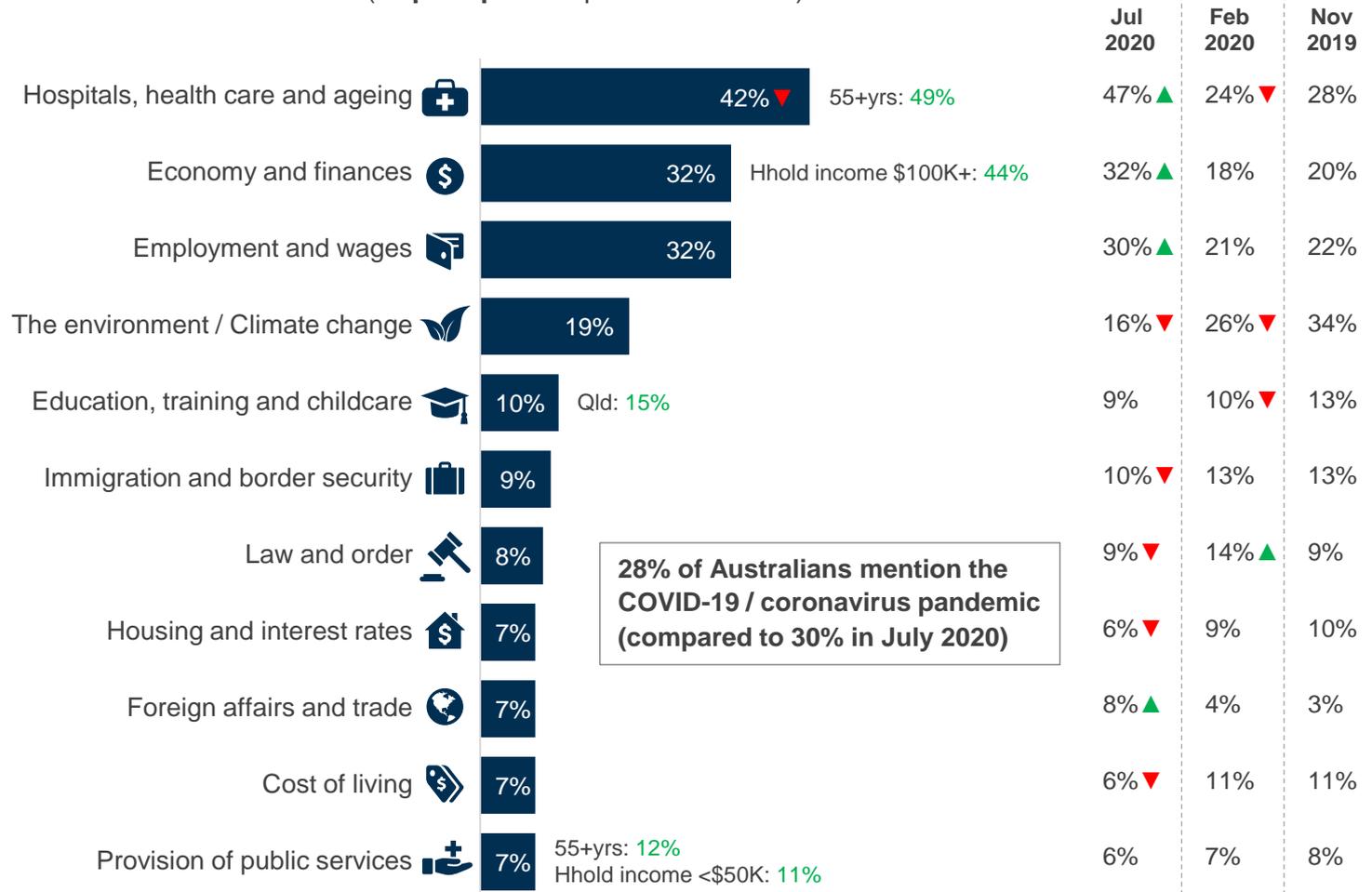
Almost three in ten (28%, similar to 30% in July) raise the COVID-19 pandemic as a top three issue or concern. Not surprising, given its impact across so many aspects of Australian life - health, the economy, business and industry, employment, law and order and immigration and border security.



Healthcare, the economy, and employment remain the most top-of-mind concerns for Australians



Most important issues the Australian Government should focus on (Unprompted – up to three issues*)



*Issues mentioned among fewer than 7% not shown.

Significantly higher than the national total at the 95% confidence interval.

Significantly ▲ higher / ▼ lower than previous True Issues wave at the 95% confidence interval.

Q. What are the most important issues that you think the Australian Government should focus on? These would be the issues or problems that personally interest or concern you the most. Please describe up to three separate issues in the text boxes below. Please be as specific as you can.

Base: All respondents (n=1,035).

Healthcare remains the leading prompted concern, ahead of cost of living and the economy



As Australia's response to the COVID-19 pandemic continues through 2020, hospitals, healthcare and ageing (55%) remain Australians' top prompted priority for Federal Government attention. Cost of living and the economy and finances (52% each) follow closely.

Employment and wages (48%, continuing a steady upward trend over the past year) and the environment and climate change (38%, up from 31% in July) again round out the top five.

Environment and climate change concern has not been muffled by the pandemic and is now similar to that seen during last year's catastrophic bushfire season (38% in November 2019 and 42% in February 2020).

Other public priorities for Government attention are also largely in line with that seen in July. Education, training and childcare, provision of public services, housing and interest rates, and immigration and border security, continue to be in the top ten most important issues to Australians.

Energy (23%, up from 16%), however, resurfaces as a top ten issue, replacing defence, security and terrorism (20%, down from 26%).

Generational differences persist. Millennials (aged 18-34 years) and Generation X (aged 35-54 years), who make up most of the Australian workforce, are still most concerned about their cost of living (57% and 56%, respectively).

Millennials also prioritise employment and wages (52%) over hospitals, healthcare and ageing (46%), the wider economy and finances (44%), and the environment and climate change (41%).

A majority of Generation X think the Government should also focus on hospitals, healthcare and ageing (54%), employment and wages (53%), and the economy and finances (52%) – well ahead of the environment and climate change (35%).

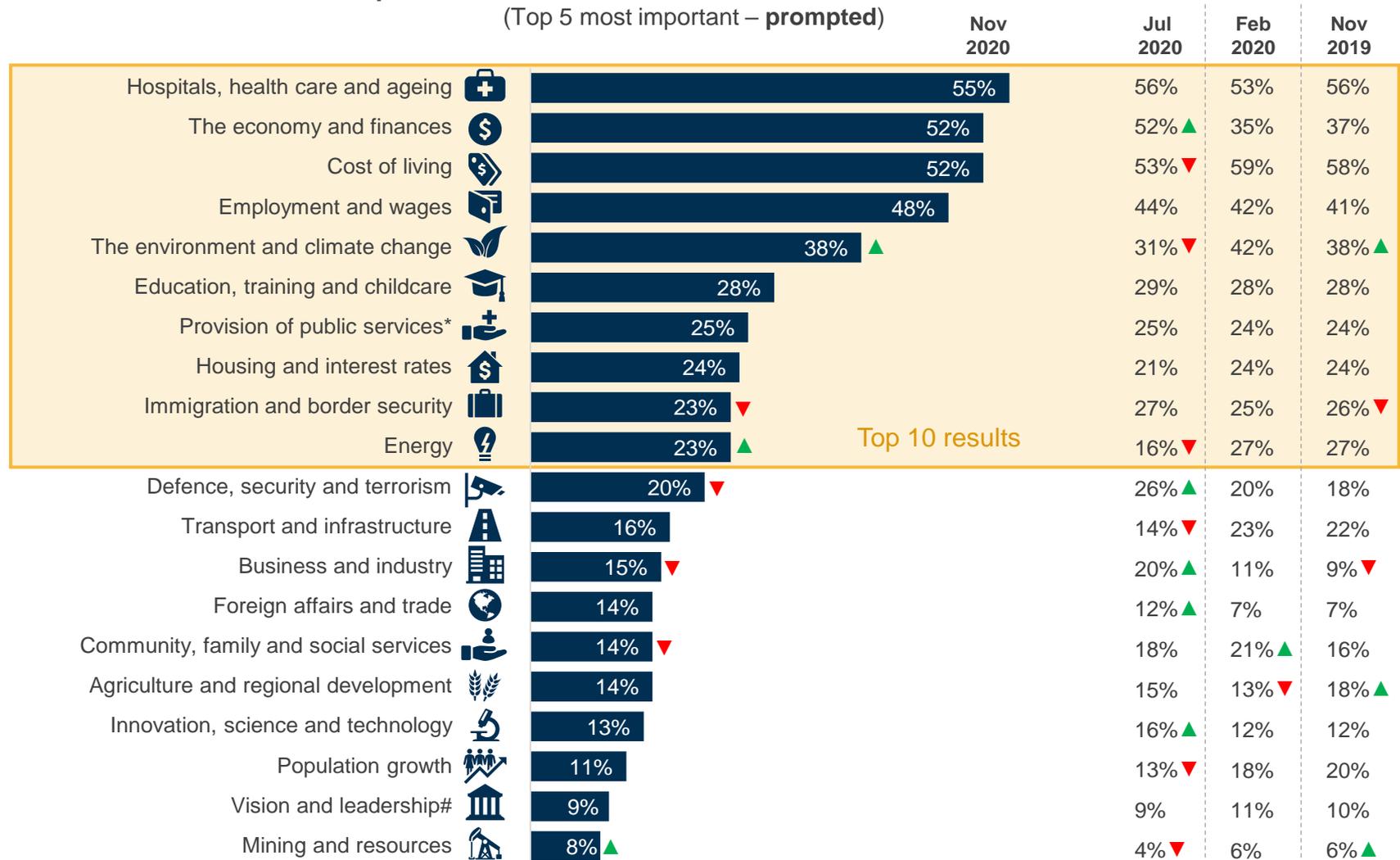
In contrast, among those aged 55+ years, hospitals, healthcare and ageing (63%), and the economy and finances (60%), continue to rate well ahead of other issues, such as, cost of living (43%), employment and wages (39%), and the environment and climate change (38%).

Although still the lowest priority of the 20 issues prompted, mining and resources has increased significantly in priority since July 2020 (up 4 points to 8%).

Healthcare leads prompted concerns and around half of adults worry about the economy, living costs, employment



Most important issues the Australian Government should focus on (Top 5 most important – prompted)

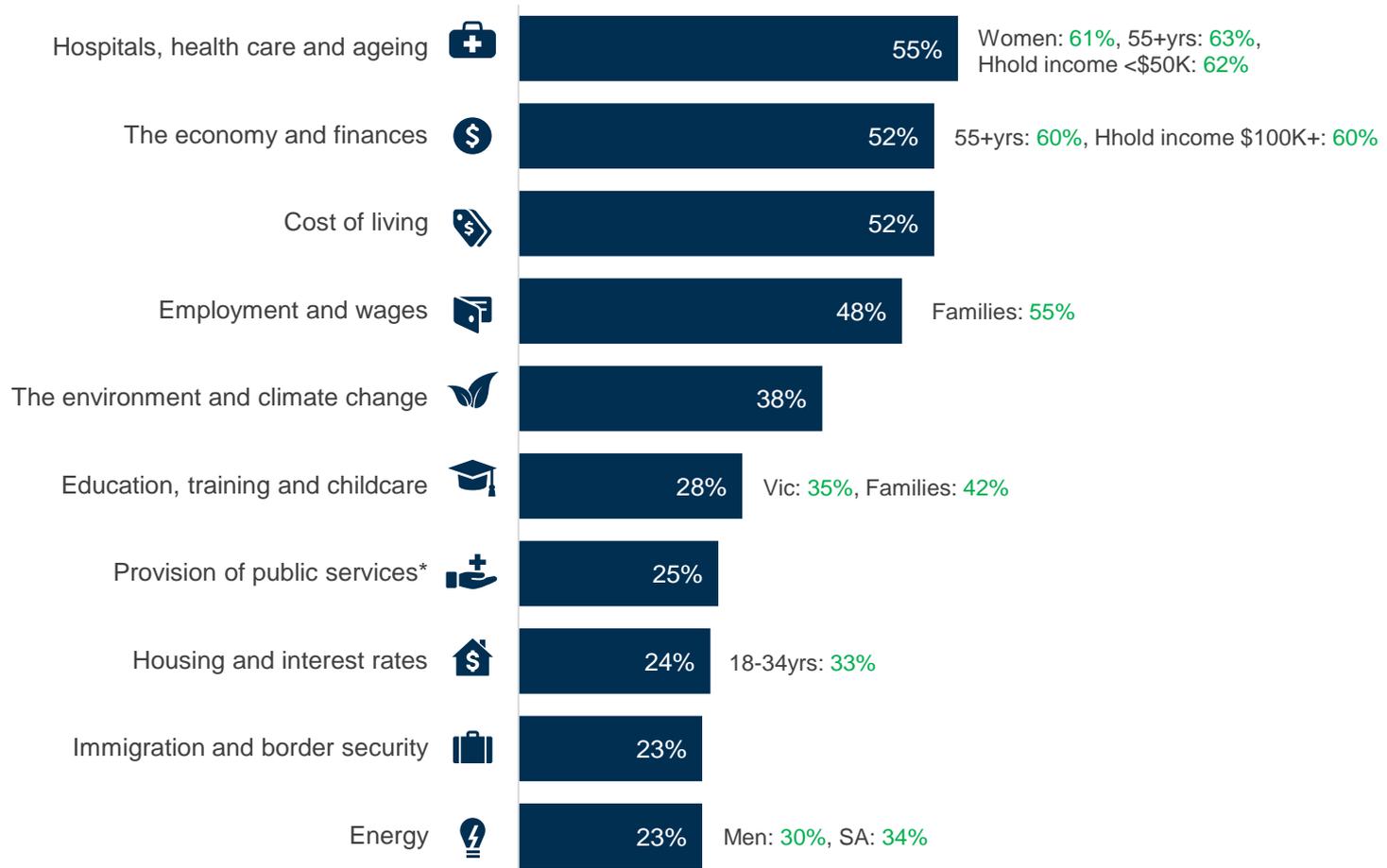


*Added in June 2019. #Changed from 'Vision, leadership and quality of government' in November 2019.
Significantly ▲ higher / ▼ lower than previous True Issues wave at the 95% confidence interval. Q. From the following list, please select the five most important issues you think the Australian Government should focus on. Base: All respondents (n=1,035).

Older adults aged 55+ years are most concerned about healthcare and the economy



Highest ranked issues the Australian Government should focus on (Top 5 most important – prompted)



*Added in June 2019.

Significantly higher than the national total at the 95% confidence interval.

Q. From the following list, please select the five most important issues you think the Australian Government should focus on.

Base: All respondents (n=1,035).

What are Australians' COVID-19 concerns?



Most Australians remain concerned about the COVID-19 pandemic and its impact on the economy



Eighty per cent of Australians (similar to 83% in July) remain concerned about the COVID-19 pandemic, with four in ten (42%, down from 48%) extremely or very concerned.

This is consistent across all states and territories in November; a contrast to the July results when a majority of Victorians were extremely or very concerned about the pandemic.

Despite a small decrease since July, most Australians remain concerned about the impact of the COVID-19 pandemic on the Australian economy (85%, down from 90%), including a majority who are extremely or very concerned (54%, down from 60%).

Two thirds or more Australians continue to cite other leading concerns:

- the impact on trade with other countries (73%)
- another lockdown due to a second wave (72%)
- the ability of the health system to cope (70%)
- family or close friends getting infected (68%)
- not being able to visit family and friends (68%)

Millennials express the most anxiety over COVID-19, recording significantly higher levels of concern across many of the impacts measured.

Stepping tentatively out of lockdown, more Victorians, relative to other states, are extremely or very concerned about being subject to another one.

Around two thirds (68%) of Australians are concerned about their state / territory borders being open and vulnerable to COVID-19 outbreaks in other states and territories. As such, the preferred threshold for the number of active cases at which borders are closed is relatively low.

Twenty per cent of adults believe borders should close to states / territories with any active cases, while just 8% of Australians believe borders should never close.

In summary, the majority (58%) of Australians say borders should be closed at 25 active cases or less. There is little tolerance for borders staying opening above this mark, with 66% believe they should be closed at 50 cases or less and 74% once there are up to 100 active cases.

Preferences vary significantly by state, with 36% of WA residents saying their borders should close to states and territories with any active cases.

In contrast, almost one in five NSW residents (19%) say the threshold for border closures should be 100 active cases or higher, and 12% say borders should not be closed at all.

Australians positive about the local response to COVID-19 and comfortable resuming some key leisure activities



Most Australians remain positive about the Australian response to COVID-19, relative to the rest of the world, and about their own personal response to the virus: 80% and 73% respectively, rate these as ‘very good’ or ‘good’.

Compared to July, people feel more positive about the response of Australians generally (58% ‘very good’ or ‘good’, up from 53%), due to more a favourable view of their fellow countrymen among Victorians (58% up from 40%).

Overall, Australians remain largely positive about the response of their State and Territory Governments (67% ‘very good’ or ‘good’), but opinion has softened on the Federal Government response (60% ‘very good’ or ‘good’, down from 66%).

Across the mainland states, WA and SA remain most positive about their State Government’s performance: 87% and 82% of residents respectively, rate this as ‘very good’ or ‘good’.

In contrast, fewer Victorians (57%) rate their Government’s performance as ‘very good’ or ‘good’, with more than one in five (22%) rating it as ‘very poor’ or ‘poor’. This however, is a slight improvement from July (50% and 27%, respectively).

Fewer Australians than in July rate the response of business and industry and local councils to COVID-19 as ‘very good’ or ‘good’ (52% in July, 45% in November).

As government restrictions ease, many Australian’s are feeling comfortable returning to the types of activities undertaken pre-COVID-19. Some trepidation however, exists.

Heading into the summer festive season, seven in ten Australians feel at least somewhat comfortable having family and friends visit their home (75%), undertaking *outdoor* leisure activities, such as meals or drinks at restaurants or pubs (71%), or going to the beach (70%). In time for Black Friday and other pre-Christmas sales, shopping in an enclosed retail centre (70%) is also endorsed.

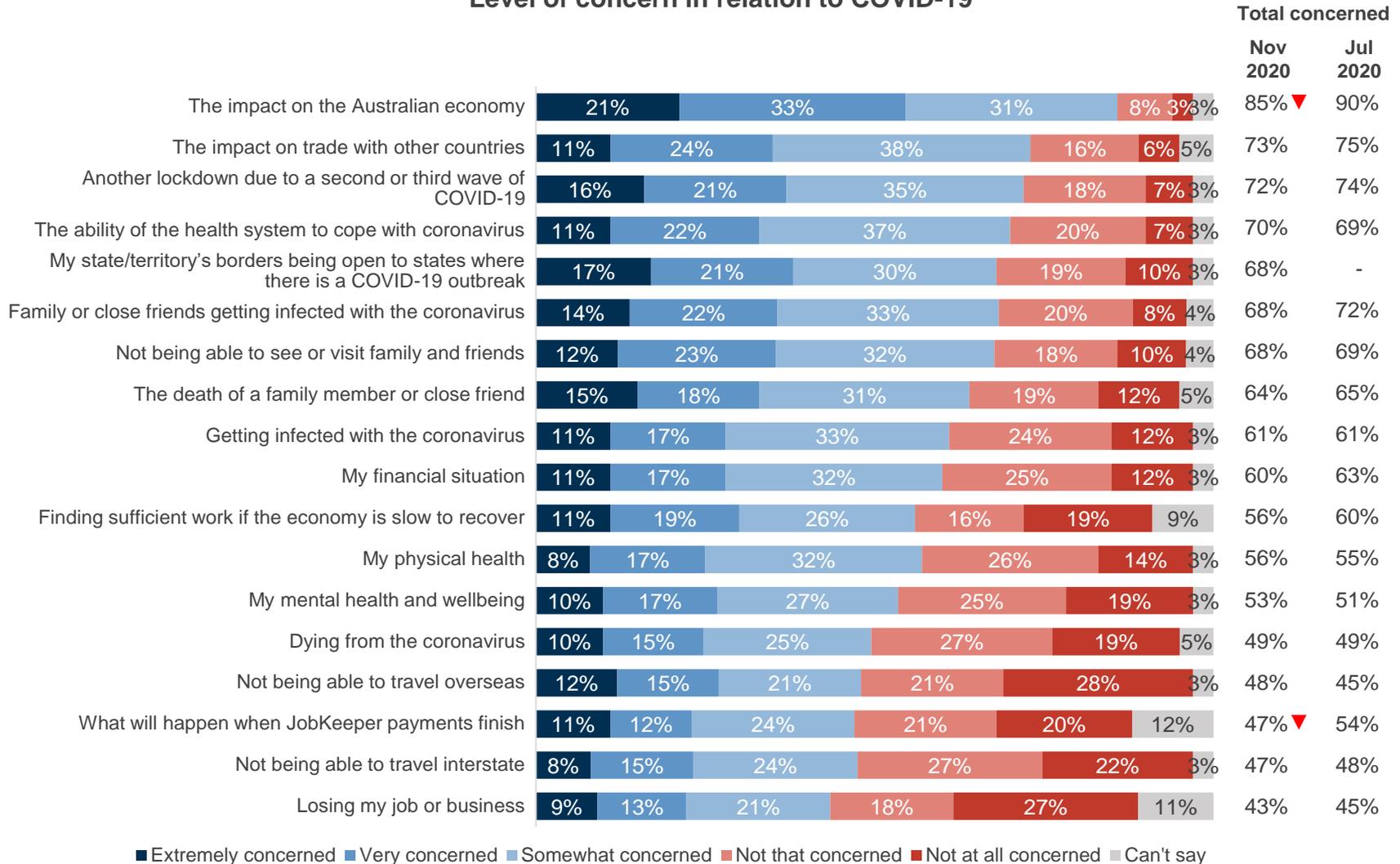
However, many Australians are *not* comfortable with large outdoor gatherings and sharing transport. Sports or entertainment events (45%), public transport for their peak hour commute (52%) or otherwise (35%), and taxis and rideshare services (43%), all raise anxiety and make people uncomfortable.

Summer holidays may also look a little different this year with many Australians *not* comfortable flying interstate (49%), staying in a hotel (39%) and least of all going on a cruise (62%).

Australians remain most concerned about impacts on the economy, international trade and further lockdowns



Level of concern in relation to COVID-19



Significantly ▼ lower than previous True Issues wave at the 95% confidence interval.
 Q. Please rate your level of concern with each of the following considerations in relation to the COVID-19 coronavirus.
 Base: All respondents (n=1,035).

COVID-19 impacts remain stronger concerns among 18-34s, while Victorians worry about further lockdowns



Total extremely / very concerned in relation to COVID-19



Significantly **higher** than the national total at the 95% confidence interval.

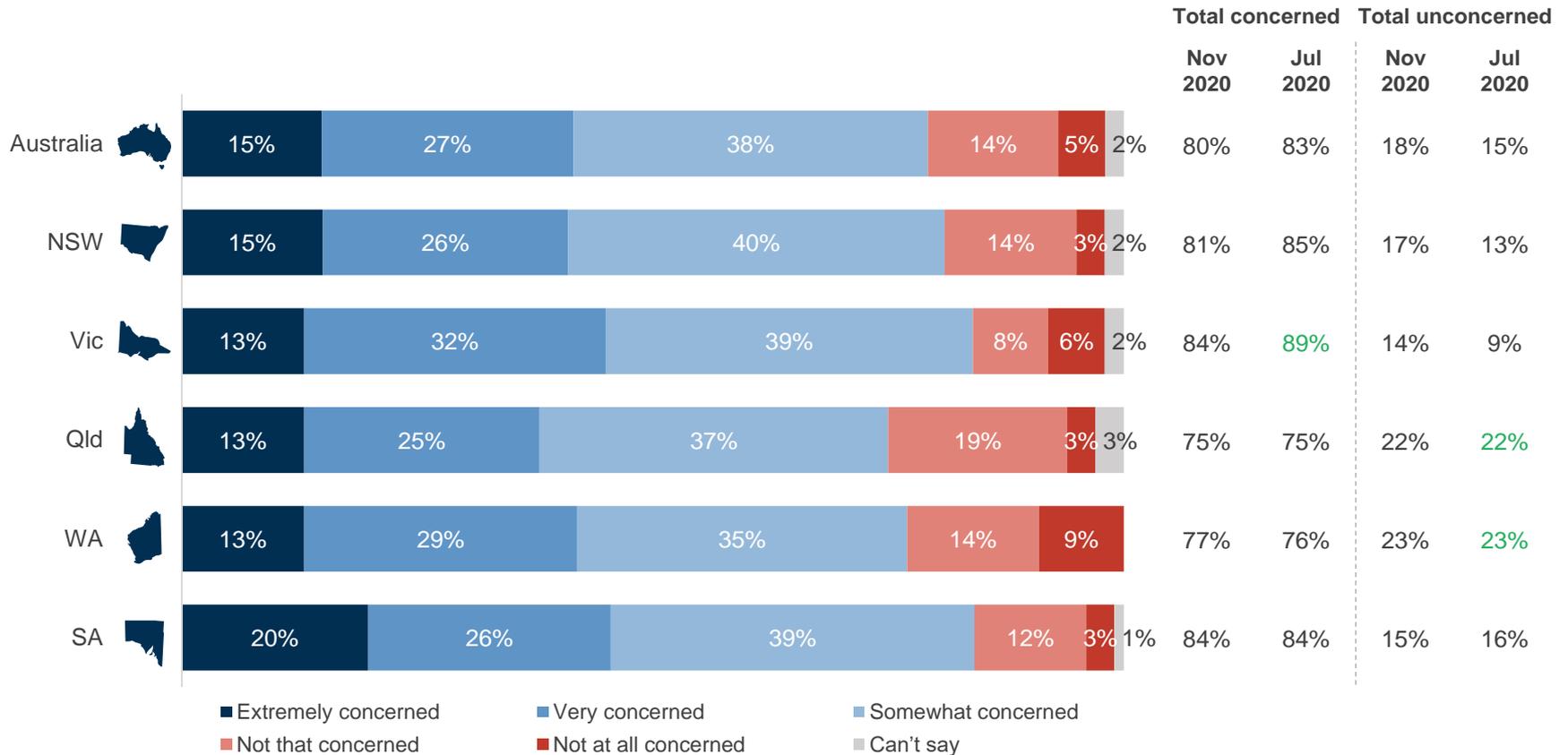
Q. Please rate your level of concern with each of the following considerations in relation to the COVID-19 coronavirus.

Base: All respondents (n=1,035).

Eight in ten Australians remain concerned about the COVID-19 pandemic



Overall concern about the COVID-19 pandemic

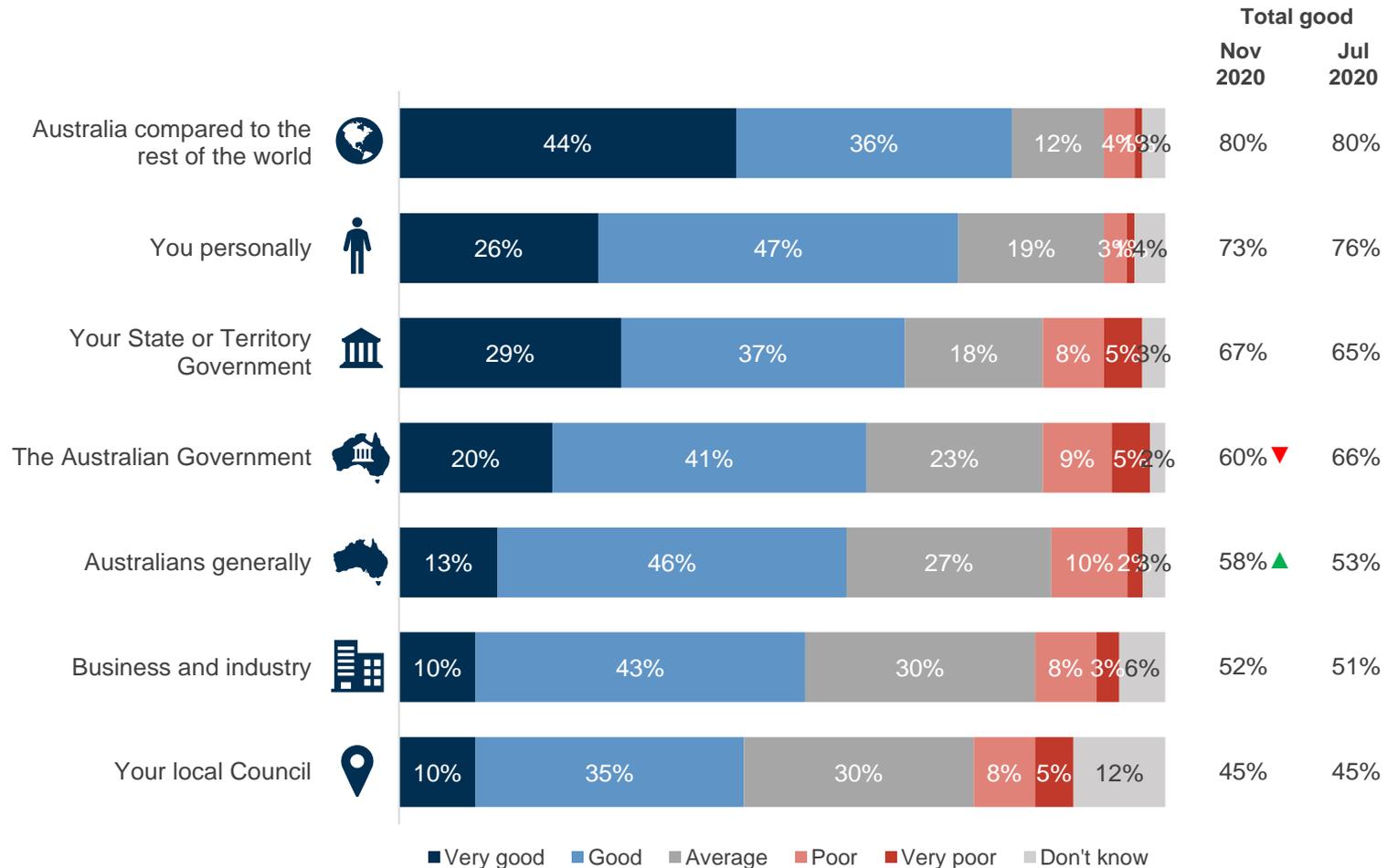


Significantly higher than the national total at the 95% confidence interval.
 Q. And how concerned are you overall about the COVID-19 coronavirus pandemic?
 Base: All respondents (n=1,035).

Australians less impressed with Federal Government response since July, but still positive on State Governments



Performance of organisations, groups and individuals in responding to COVID-19

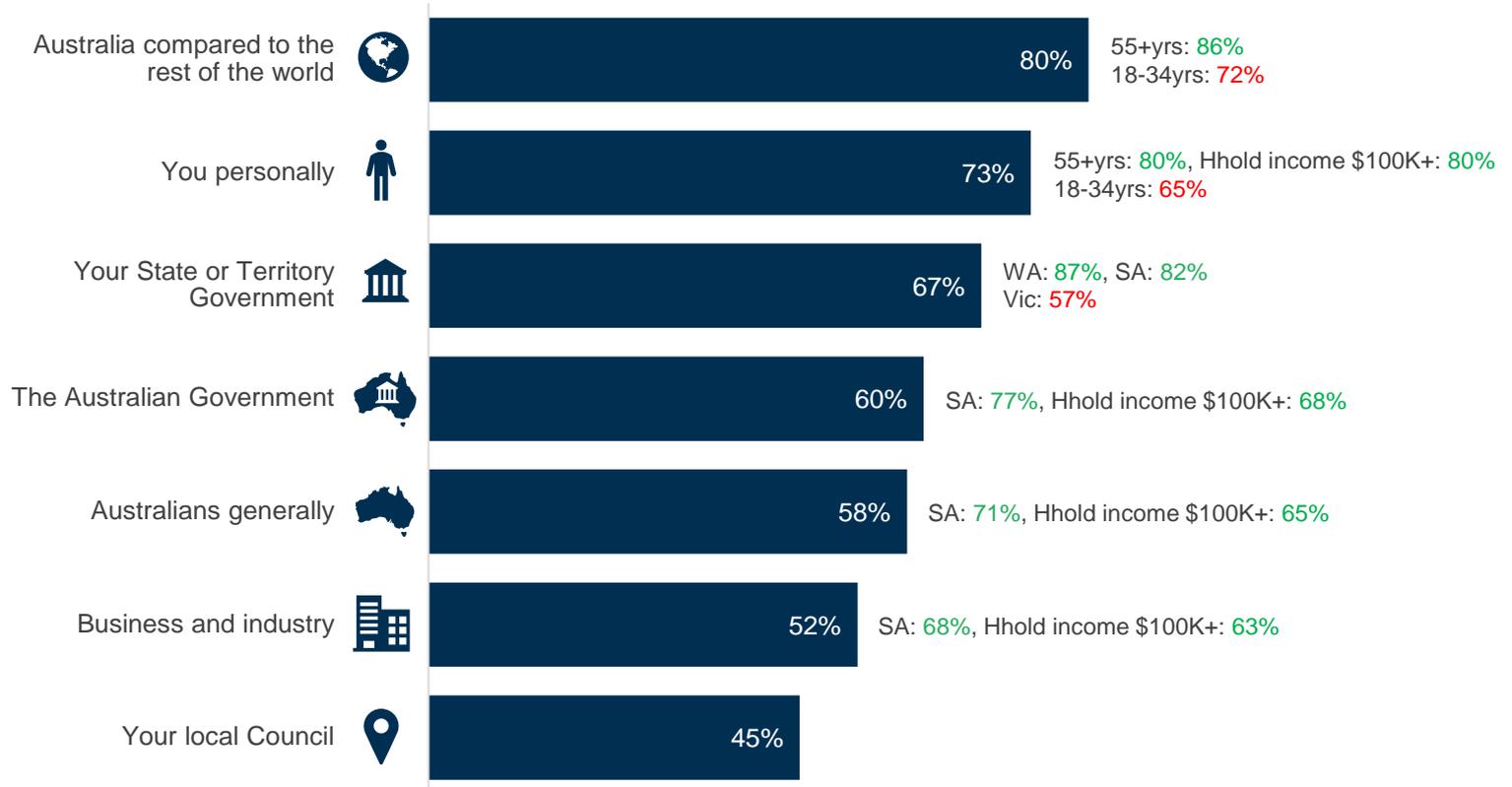


Significantly ▲ higher / ▼ lower than previous True Issues wave at the 95% confidence interval.
 Q. How would you rate the response to the COVID-19 coronavirus of each of the following groups?
 Base: All respondents (n=1,035).

WA and SA Government responses receive strongest rating; Victorians less impressed by their State Government



Total good / very good performance in responding to COVID-19

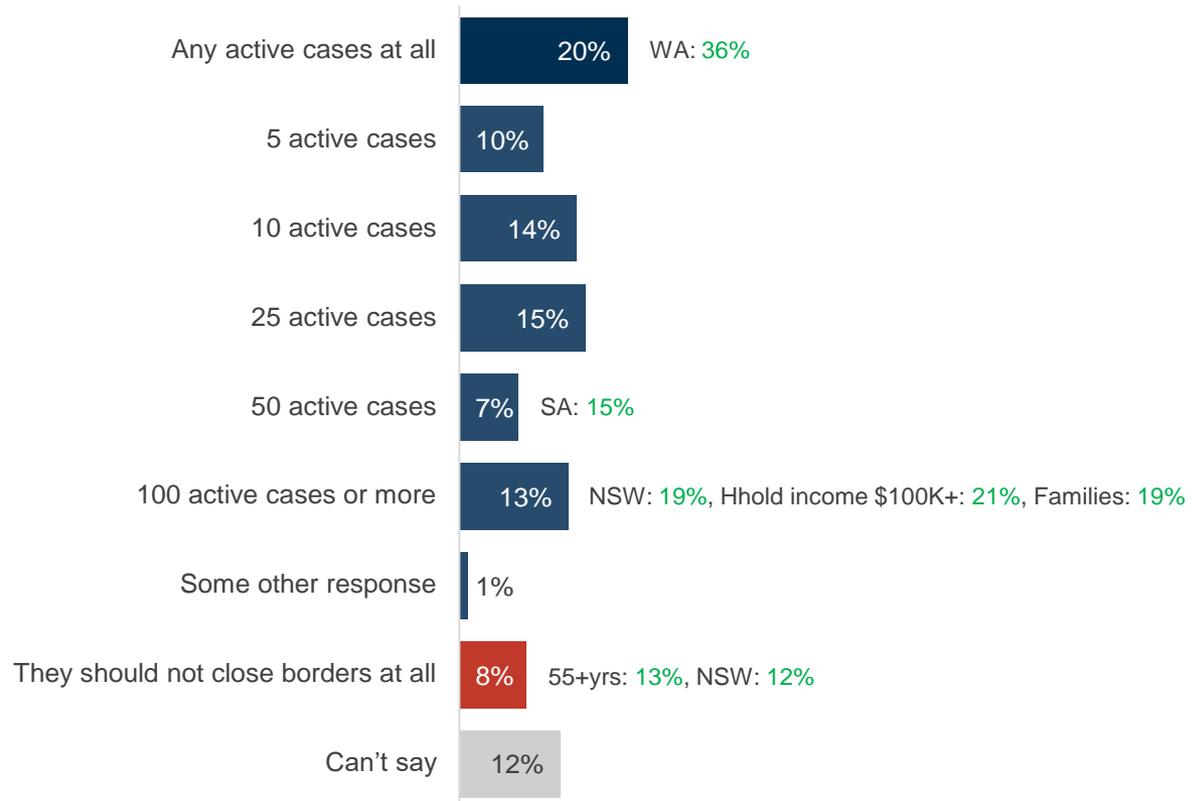


Significantly higher / lower than the national total at the 95% confidence interval.
 Q. How would you rate the response to the COVID-19 coronavirus of each of the following groups?
 Base: All respondents (n=1,035).

One in five Australians feel a COVID-19 outbreak of any size should trigger state border closures – higher in WA



Threshold of active COVID-19 cases required to close State / Territory borders



Significantly **higher** than the national total at the 95% confidence interval.

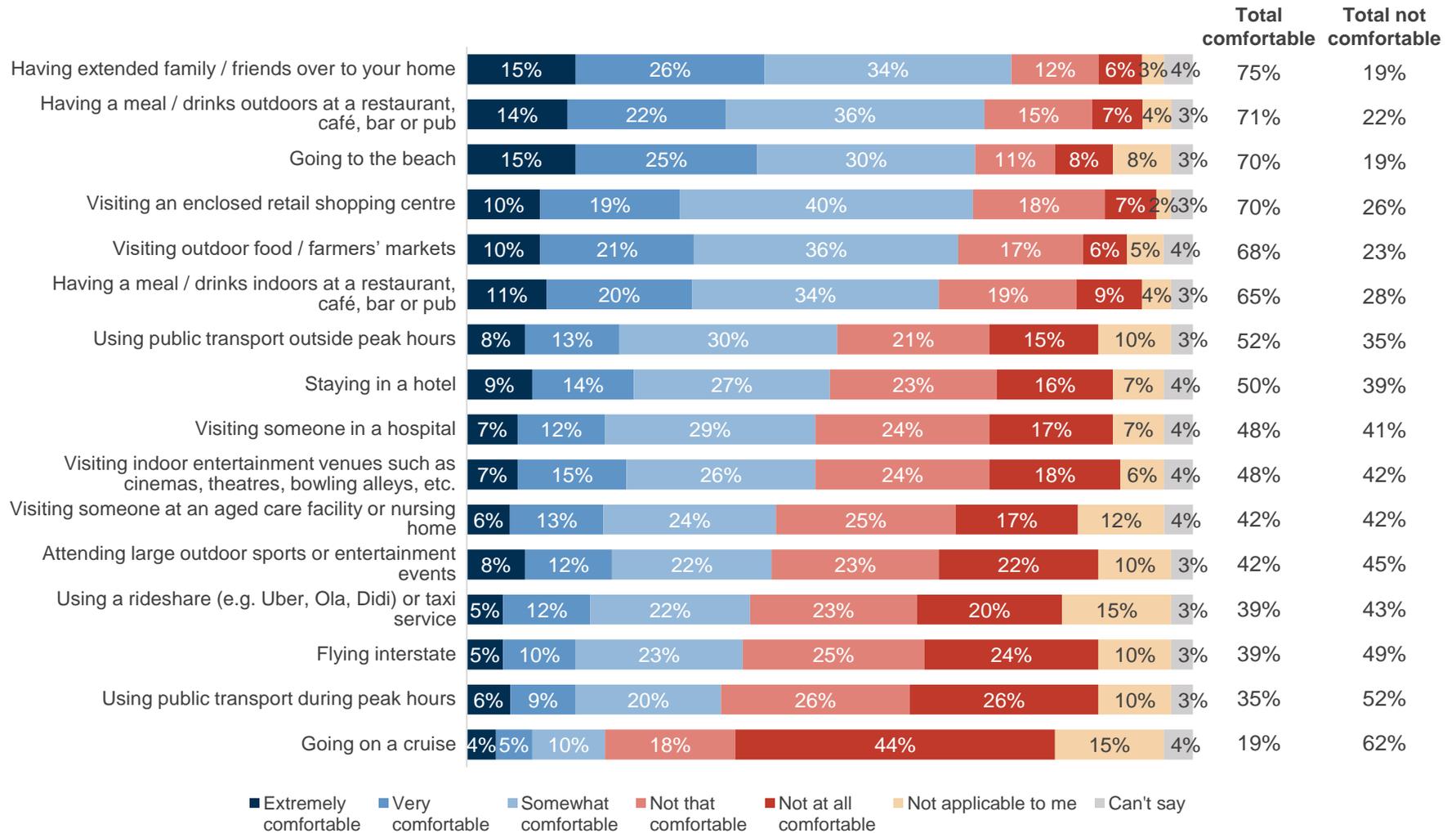
Q. In your view, when should State and Territory Governments close their borders to an interstate COVID-19 outbreak? When that State and Territory has an outbreak of...

Base: All respondents (n=1,035).

Australians comfortable with visitors to homes and outdoor activities, but not cruises or peak hour public transport



Level of comfort undertaking activities over the next couple of months

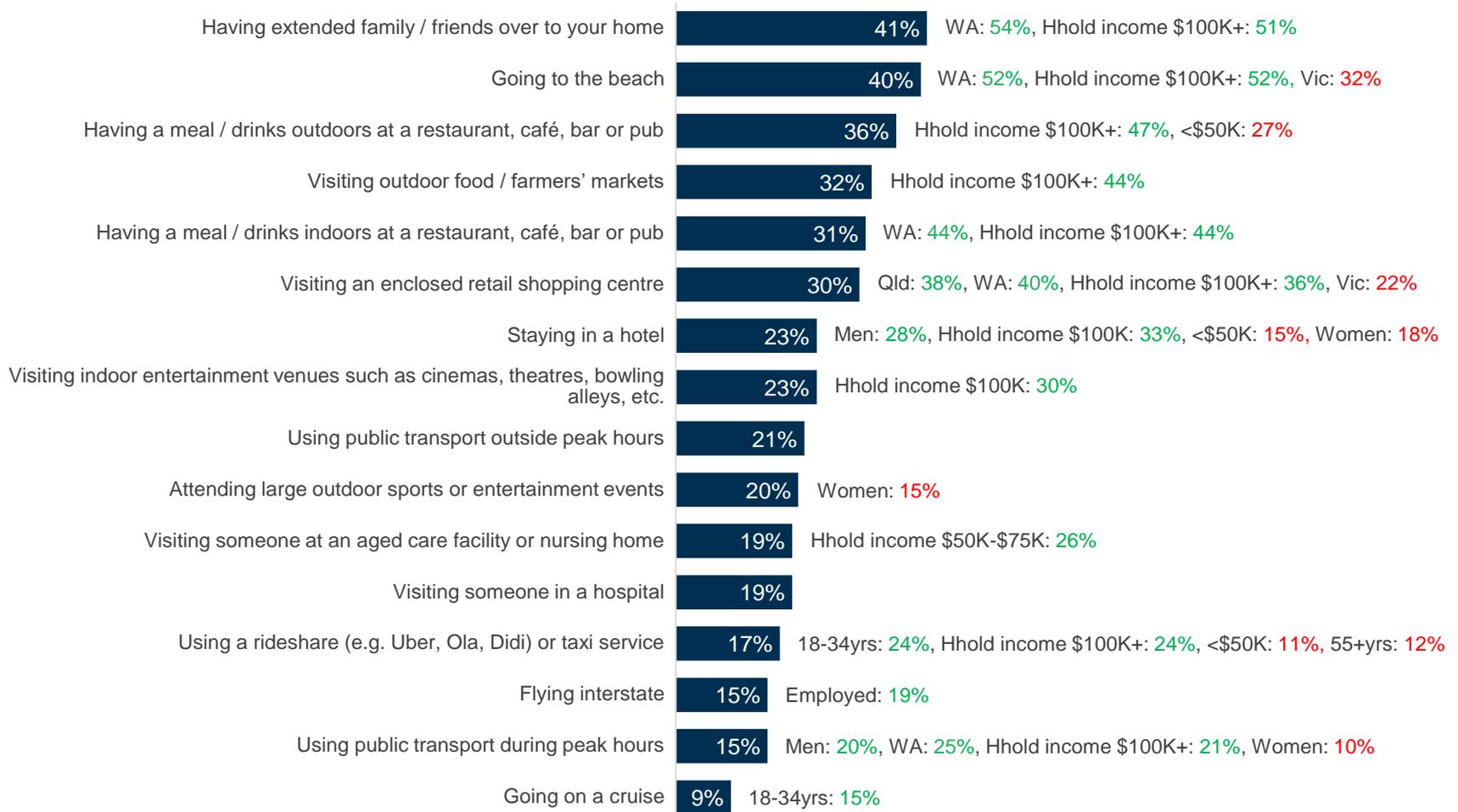


Q. Assuming the latest COVID-19 health and social distancing requirements are followed, please rate your level of comfort doing each of the following activities over the next couple of months.
 Base: All respondents (n=1,035).

WA, Queenslanders and higher income households are more comfortable getting back to pre-COVID-19 activities



Total extremely / very comfortable undertaking activities



Significantly **higher** / **lower** than the national total at the 95% confidence interval.

Q. Assuming the latest COVID-19 health and social distancing requirements are followed, please rate your level of comfort doing each of the following activities over the next couple of months.

Base: All respondents (n=1,035).



**Are we headed in
the right
direction?**

Australians feel more optimistic about the direction of business, and state / territory and national economies



There is increased optimism as the nation looks ahead to a summer holiday period with few COVID-19 cases and relaxed restrictions on public movement, including across state borders.

Despite the year's challenges, Australians remain positive about their own personal situation in 2020: 39% feel they're heading in the right direction (37% in July) – more than twice those who feel they're heading in the wrong direction (14%).

Similarly, Australians remain confident about their local community: 35% feel it's heading in the right direction (31% in July) – again, more than twice those who feel it's heading in the wrong direction (15%).

With businesses re-opening and workers returning to their workplaces, confidence in business and industry continues to strengthen (29% right direction, up from 25% in July). Fewer now feel it's heading in the wrong direction (17%, down from 23%).

Public sentiment around the national economy has also improved. More Australians now see it heading in the right direction (28%, up from 23%), with fewer see it heading in the wrong direction (26%, down from 33%).

Confidence in state and territory economies is even stronger. Least disrupted by COVID-19, a majority of WA residents (62%, up from 54%) continue to see their state economy as heading in the right direction.

Residents of other mainland states are also optimistic. In NSW and SA, more residents continue to feel their state economy is heading in the right (38% and 36%, respectively) as opposed to wrong direction (20% for each).

Previously, more Victorian and Queensland residents saw their state economies as heading in the wrong direction.

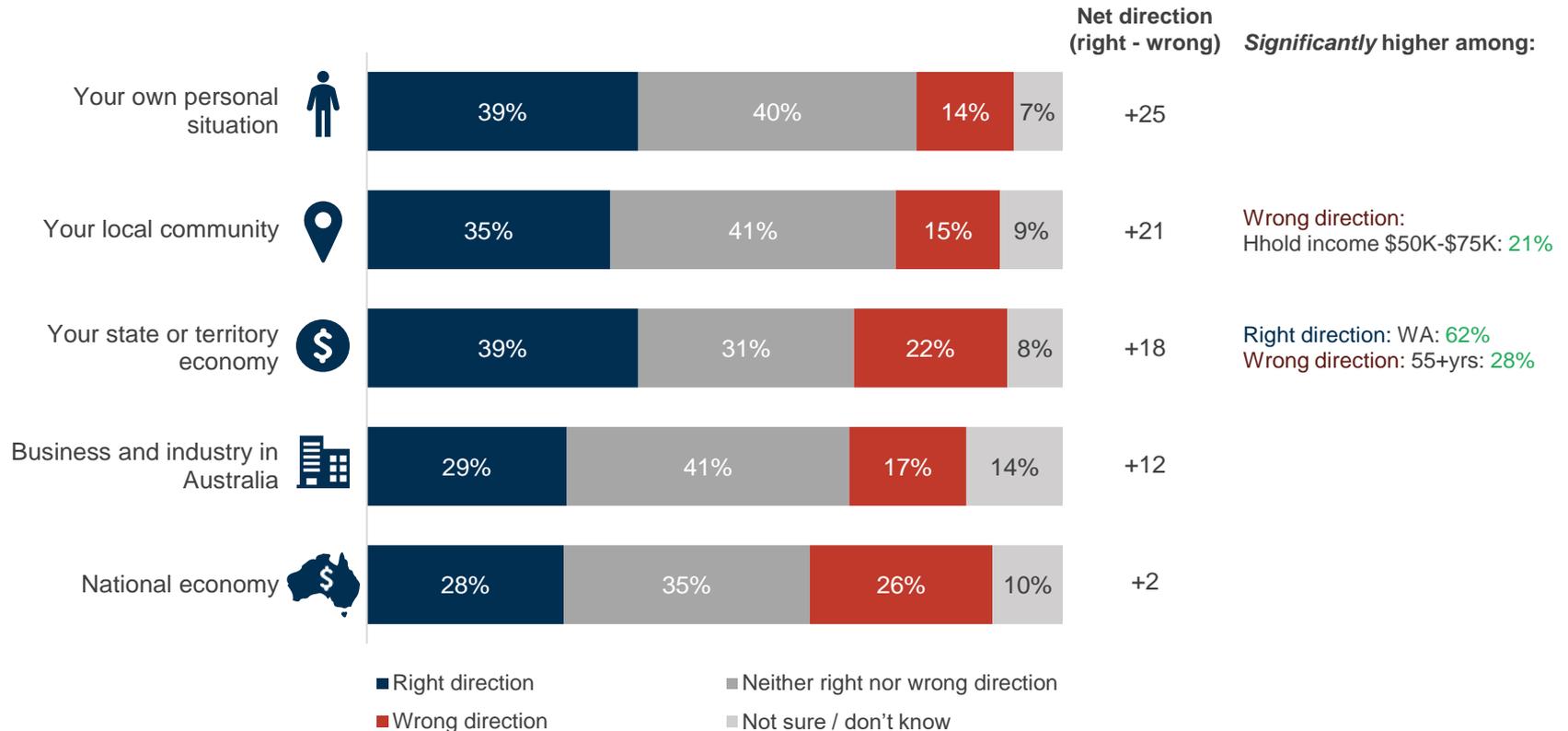
However, with the Palaszczuk Government comfortably returned and moving toward re-opening their state borders, more Queenslanders now see their state economy as heading in the right direction (33%, up from 25%), than wrong direction (28%, down from 30%).

Similarly, with their state at the end of its second wave of COVID-19 and looking forward to a 'COVID normal' summer, more Victorians now see their state economy as heading in the right direction (38%, up from 25%), than wrong direction (25%, down from 33%).

Australians optimistic about their future and direction of their community, business, state and national economies



Direction of organisations and groups in Australia

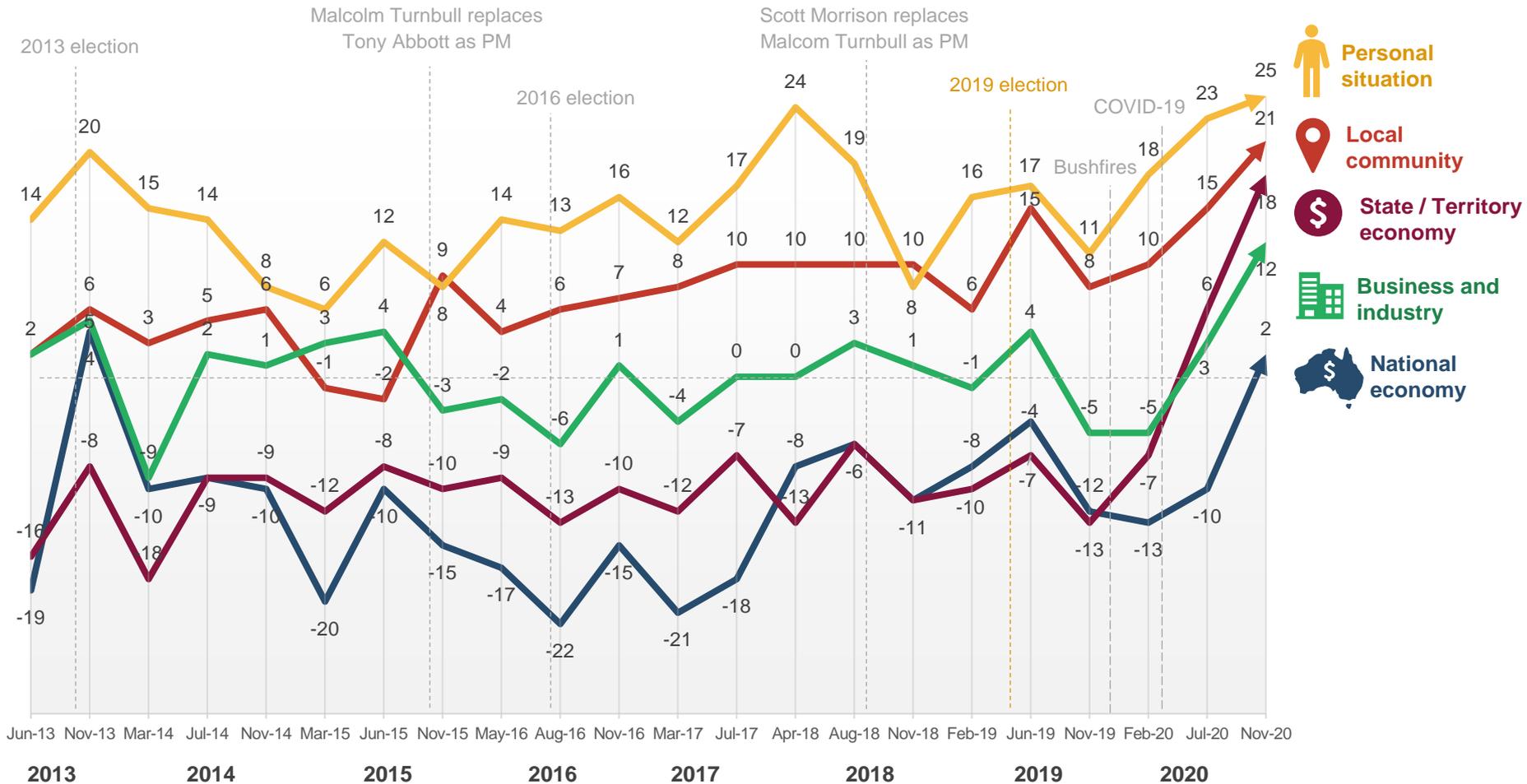


Significantly higher than the national total at the 95% confidence interval.
 Q. Do you think each of the following is generally headed in the right or the wrong direction?
 Base: All respondents (n=1,035).

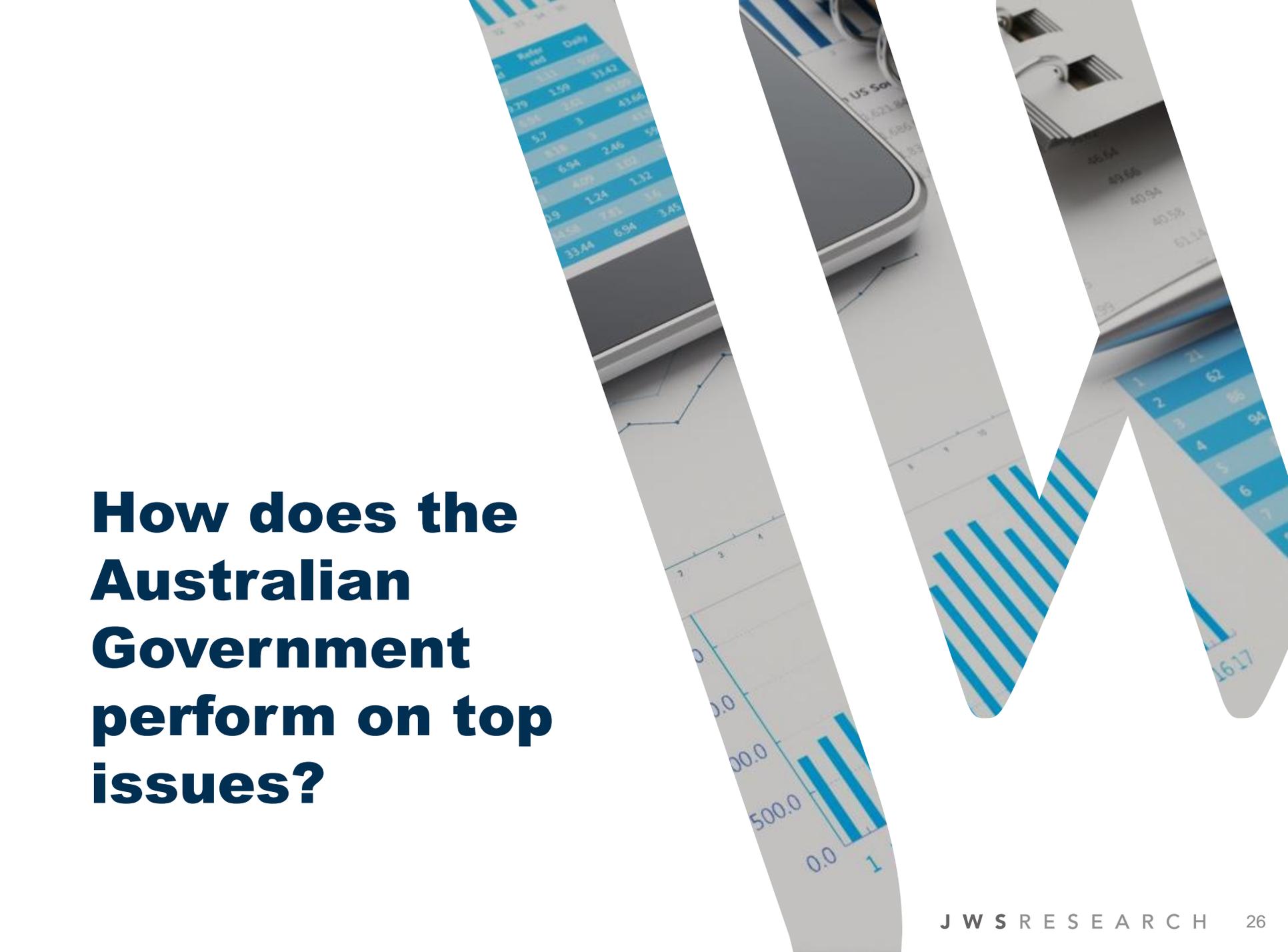
Australians more optimistic about business and industry and the national economy than in July



Direction of organisations and groups in Australia
 Net direction trend (right direction % - wrong direction %)



Q. Do you think each of the following is generally headed in the right or the wrong direction?
 Base: All respondents (n=1,035).

The background features a collage of financial data and charts. On the left, a smartphone screen displays a table with columns for 'Index', 'Daily', and 'US Sp'. The table includes values such as 1.11, 1.99, 31.42, 1.79, 2.05, 43.66, 5.7, 3, 1.8, 6.94, 2.86, 50, 4.02, 1.02, 1.24, 1.4, 4.58, 7.85, 1.4, 33.44, 6.94, and 3.4%. In the center, a line graph shows an upward trend. On the right, a laptop screen displays a bar chart with values 46.54, 43.66, 40.94, 40.58, and 61.14. Below the laptop, a bar chart shows values 1, 2, 3, 4, 5, 6, and 7. At the bottom right, a bar chart shows values 0.0, 500.0, and 1617.

How does the Australian Government perform on top issues?

Government performance up on foreign affairs and trade, but down on hospitals, healthcare and ageing



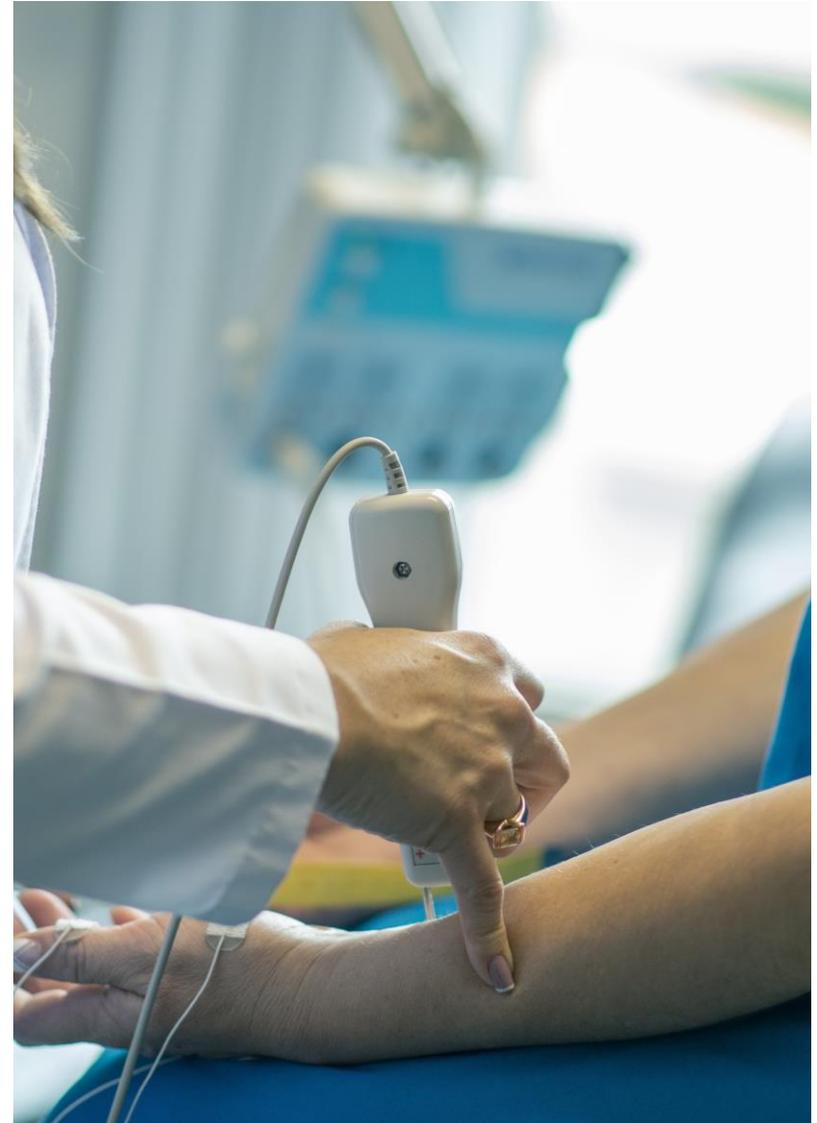
The improved Federal Government performance ratings recorded across all key areas in July have been largely maintained in November. Foreign affairs and trade (index score of 52, up two points) and hospitals, healthcare and ageing (index of 50, down three points) are the only areas to vary by more than one index point from four months ago.

While still a relatively low-level priority, foreign affairs and trade is now a concern for 14% of adults, twice as many as in February (7%). Australia's relationship and trade with China, in particular, is an issue some feel the Federal Government should be focusing on.

Cost of living (index of 43), the environment and climate change (index of 46), energy (index of 47) and employment and wages (index of 48) remain the Morrison Government's poorer performing areas.

Defence, security and terrorism remain its best performing area overall (index of 59). The Government also continues to perform well in areas such as business and industry (index of 56), mining and resources, immigration and border security, and the provision of public services (index of 55 for each).

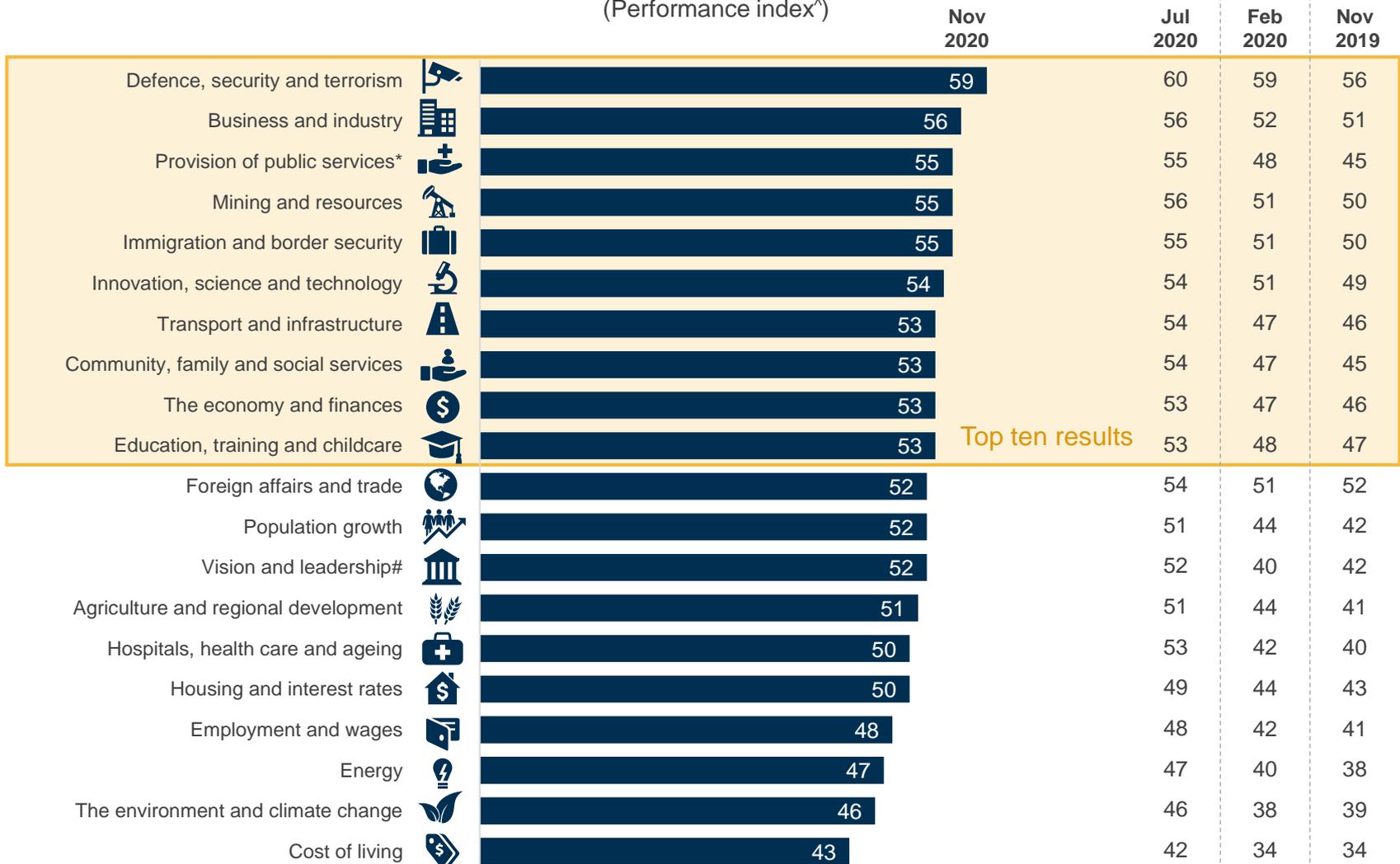
Note that this latest True Issues poll was taken in the three days following the release of the (redacted) Inspector General of the Australian Defence Force report into conduct of Australian SAS officers in Afghanistan. Its full impact on public opinion may not be known until the next measure.



Government performance slightly stronger on foreign affairs and trade, weaker on healthcare



Australian Government performance on issues (Performance index^{*)}



*Added in June 2019. #Changed from 'Vision, leadership and quality of government' in November 2019.

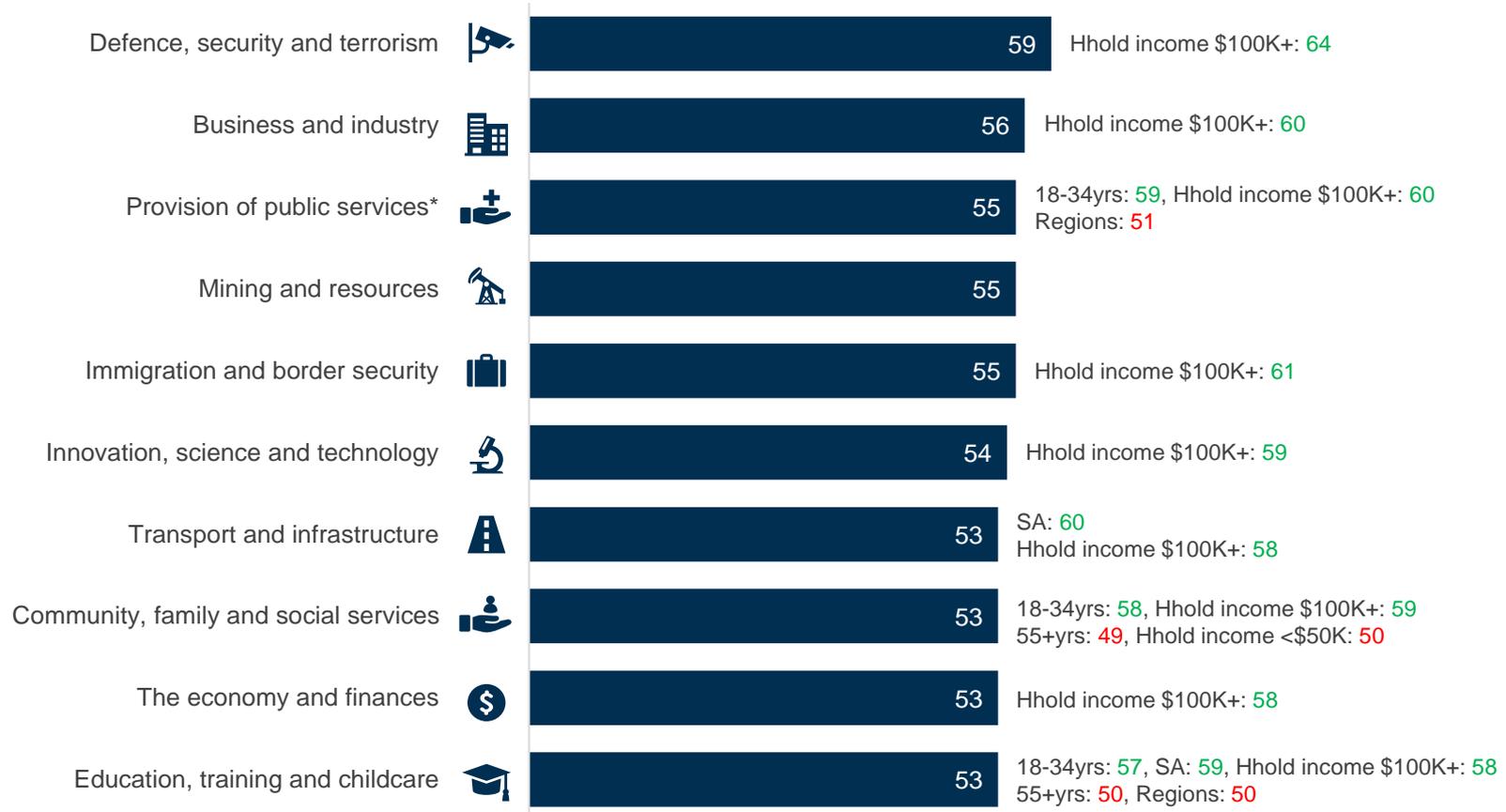
^{*}For an explanation of how index scores are calculated refer to the survey methodology section of this report.

Q. How would you rate the performance of the Australian Government on each of the following issues? Base: All respondents (n=1,035).

Younger adults rate Government performance more favourably on community, social and public services



Top ranked issues for Australian Government performance
(Performance index[^])



*Added in June 2019. [^]For an explanation of how index scores are calculated refer to the survey methodology section of this report. Significantly higher / lower than the national total at the 95% confidence interval.
Q. How would you rate the performance of the Australian Government on each of the following issues?
Base: All respondents (n=1,035).



**How are
government,
business and
industry
performing?**

Federal and State Government performance ratings remain high and perceptions of business continue to improve



Several months into its response to the COVID-19 pandemic, Federal Government performance continues to rate highly, at an index score of 62. This is similar to its July 2020 result – index score of 63 – the highest performance score for an Australian Government since *True Issues* began in June 2013.

Around half of Australians rate the Federal Government's current performance as 'very good' or 'good' (53%). While this is a small decrease since July (58%), it remains almost twice as many as in February 2020 (28%). More now rate the Morrison Government's performance as 'average' (31%, up from 26%), but very few (14%) rate it as 'very poor' or 'poor' – similar to July (15%), and less than half as many as in February (34%).

Overall, State and Territory Governments have maintained a similarly strong performance rating as a result of their COVID-19 response (index of 64, similar to 63 in July and higher than 50 in February), as have local councils (index of 55, similar to 56 in July, but higher than 52 in February).

Perceptions of business and industry performance continue to steadily improve (index of 57, compared to 55 in July and 53 in February).

Similar to July, the WA State Government continues to outperform other states, with an index score of 77 (down from 83 in July, but still well ahead of its February score of 49). SA State Government performance is now also rated above the national average, with an index score of 70.

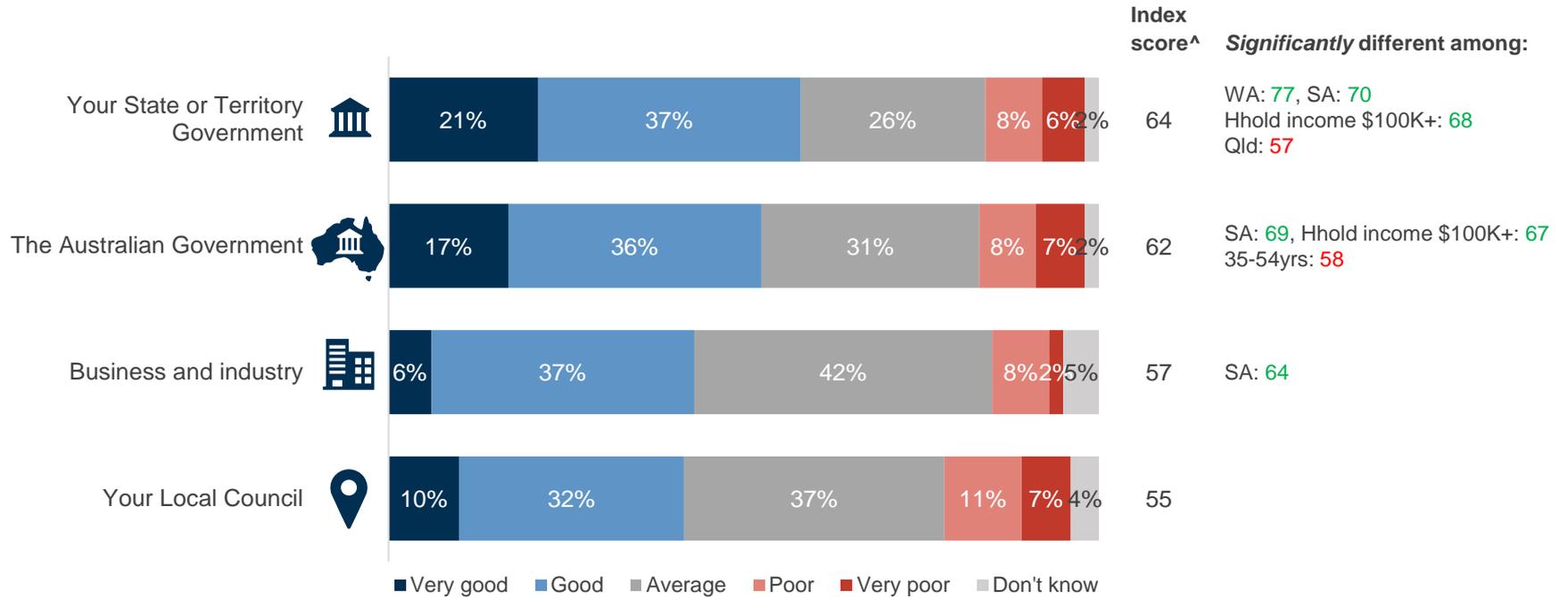
The performance of State Governments in NSW (index of 65, up from 62 in July and 52 in February) and Victoria (index of 60, up from 57 in July and 54 in February) are lower by comparison, but have seen steady improvement over 2020.

However, opinion has softened on the newly returned Palaszczuk Government (index of 57, down from 61), now rated below the national average on performance, but still well ahead of its own February score (index of 43).

State / Territory and Federal Governments continue to outperform business and industry



Performance of organisations and groups in Australia



Significantly higher / lower than the national total at the 95% confidence interval.

[^]For an explanation of how index scores are calculated refer to the research methodology section of this report.

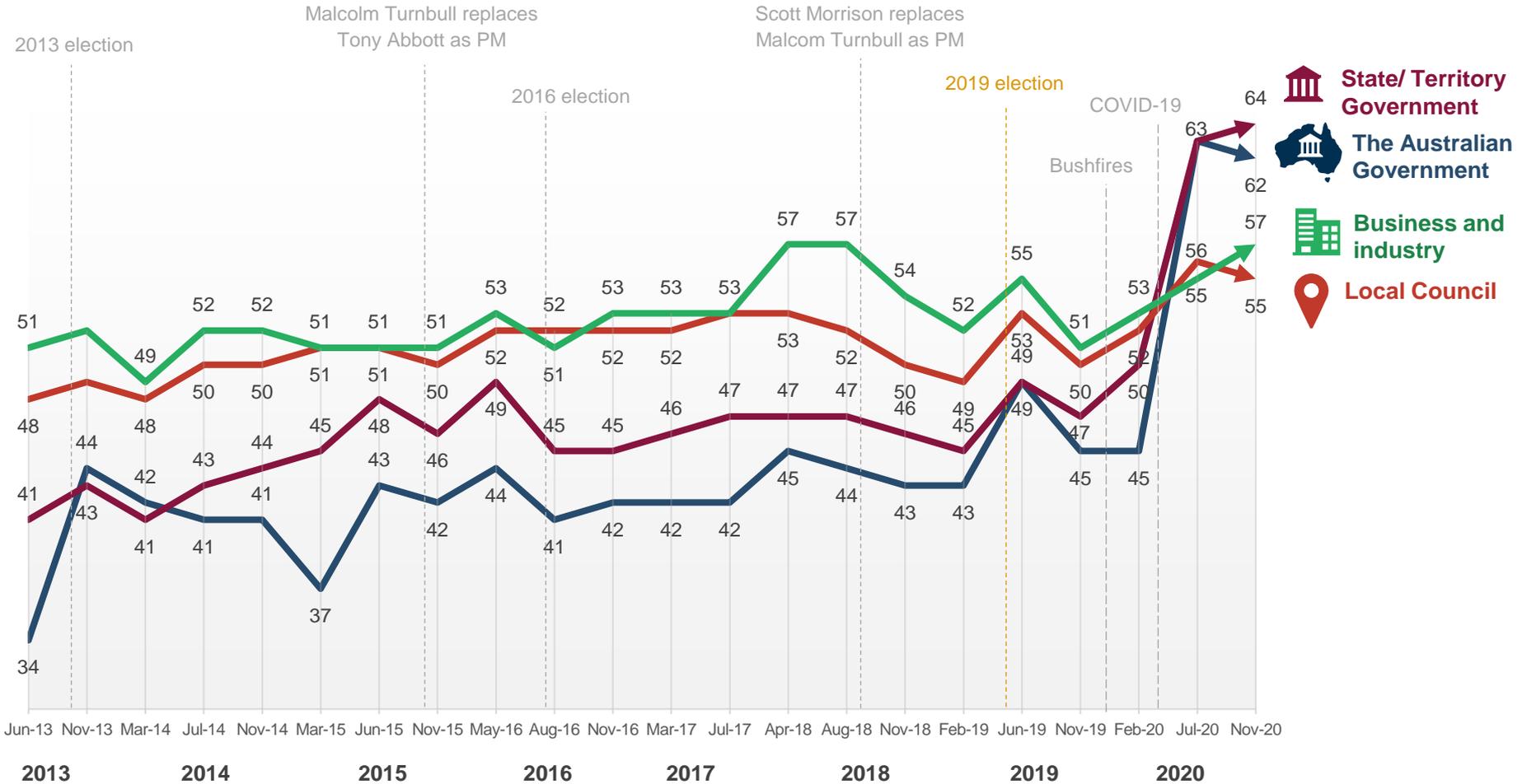
Q. How would you rate the current performance of each of the following organisations or groups in Australia?

Base: All respondents (n=1,035).

Federal and State / Territory Government performance remains highly rated following COVID-19 response



Performance of organisations and groups in Australia
Index score trend^



^For an explanation of how index scores are calculated refer to the survey methodology section of this report.
Q. How would you rate the current performance of each of the following organisations or groups in Australia?
Base: All respondents (n=1,035).

Should we make changes to the Australian National Anthem?



Half of Australians support a change to the national anthem to acknowledge our indigenous history



There is some public awareness and support for NSW Premier Gladys Berejiklian's suggestion to replace the national anthem's lyrics, "We are *young* and free", with "We are *one* and free", to acknowledge Australia's indigenous history.

Almost six in ten Australians (59%) have heard about this suggested change, with awareness higher among older Australians aged 55+ years (81%) than Millennials (18-34 years: 45%) and Generation X (35-54 years: 48%).

Fifty-one per cent of Australians support this suggested change, outweighing opposition (26%) by almost 2:1. A further one in ten adults (10%) feel they would need more information to form a view on this issue, with the balance undecided (12%).

Support is higher (58% compared to 51% overall) amongst those who are aware of the suggested change.

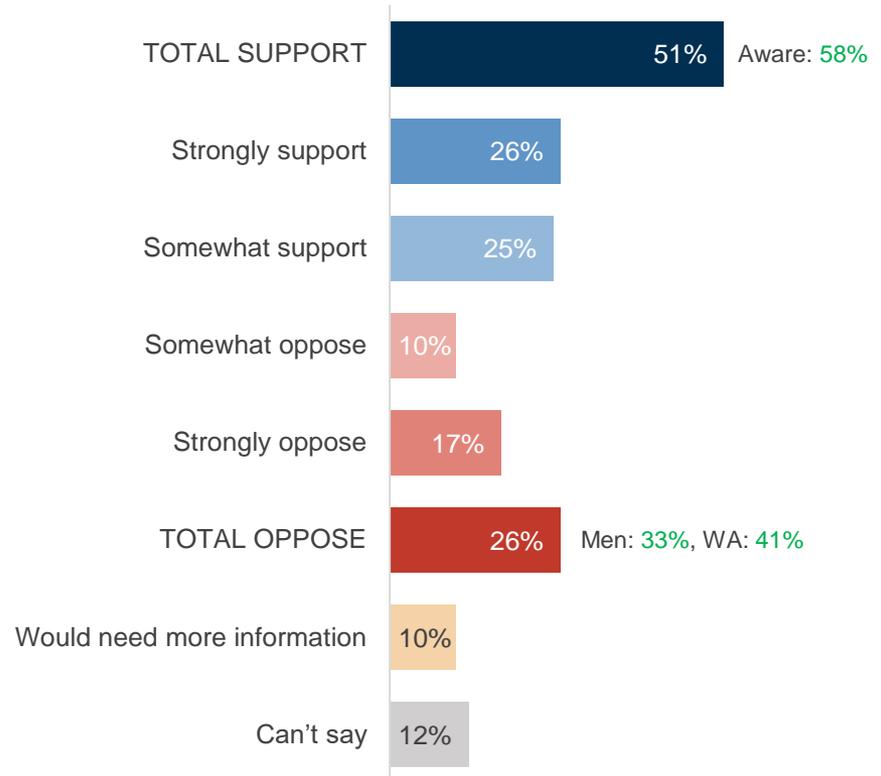
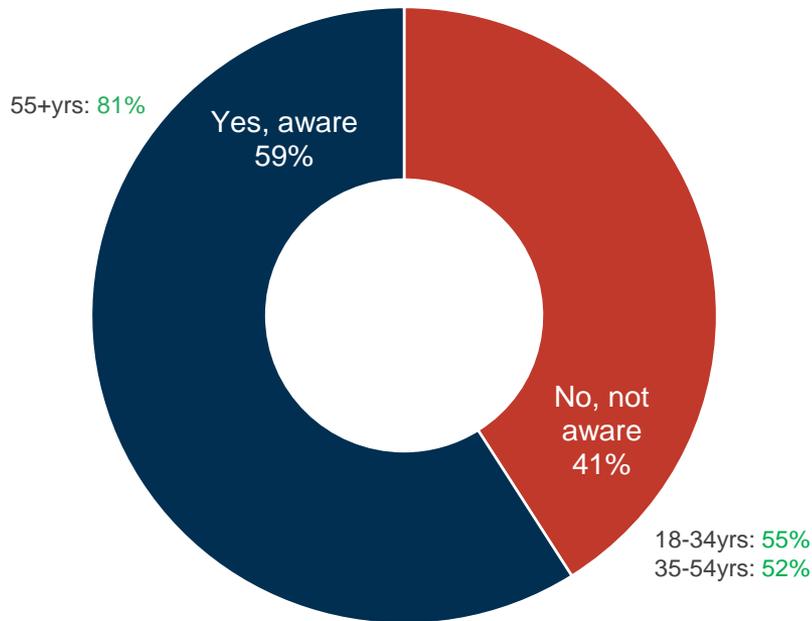
Opposition to this change is higher among men, at one in three (33%), and among WA residents (41%).



Almost six in ten Australians have heard of the change to “We are *one* and free”, and half of Australians support it



Awareness and support for changing “We are young and free” to “We are *one* and free” in Australia’s national anthem



Significantly **higher** than the national total at the 95% confidence interval.

Q. The Australian national anthem starts with the words, “Australians all let us rejoice, for we are young and free”. It has been suggested that the words “We are young and free” should be changed to “We are *one* and free”, to acknowledge the nation’s Indigenous history. Before now, were you aware of this suggestion to change the words of the national anthem from “We are young and free” to “We are *one* and free”?

Q. Do you support or oppose changing the words of the national anthem from “We are **young** and free” to “We are **one** and free”, to acknowledge the nation’s Indigenous history?

Base: All respondents (n=1,035).

**THERE ARE
OVER
25 MILLION
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**FIND OUT
WHAT THEY'RE
THINKING.**



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John Scales
Founder
jcales@jwsresearch.com

Mark Zuker
Managing Director
mzucker@jwsresearch.com

Katrina Cox
Director of Client Services
kcox@jwsresearch.com

Cassandra Marks
Account Manager
cmarks@jwsresearch.com

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