



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

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

TRUE ISSUES®

FEBRUARY 2021



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Survey methodology



National Online Survey

n=1,000 Australian adults

- Conducted Thursday 18th – Monday 22nd February 2021.
- 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=1,000 is +/-3.1% 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 response enters its second year, concerns about healthcare, the economy, employment are top of mind

Twelve months into Australia's COVID-19 response, healthcare remains the dominant community concern. When asked to name up to three issues that personally interest or concern them the most, and that the Australian Government should focus on, four in ten adults (45%) continue to describe issues related to hospitals, healthcare and ageing.

The economy and finances (26%) and employment and wages (25%) continue to round out the top three – but are lesser concerns than in November (32% each) and July 2020 (32% and 30%, respectively).

In February 2021, at the end of Victoria's five-day snap lockdown and the rollout of the COVID-19 vaccines program, Australians continue to negotiate intra and inter state restrictions on their movement while trying to find a new 'COVID normal'.

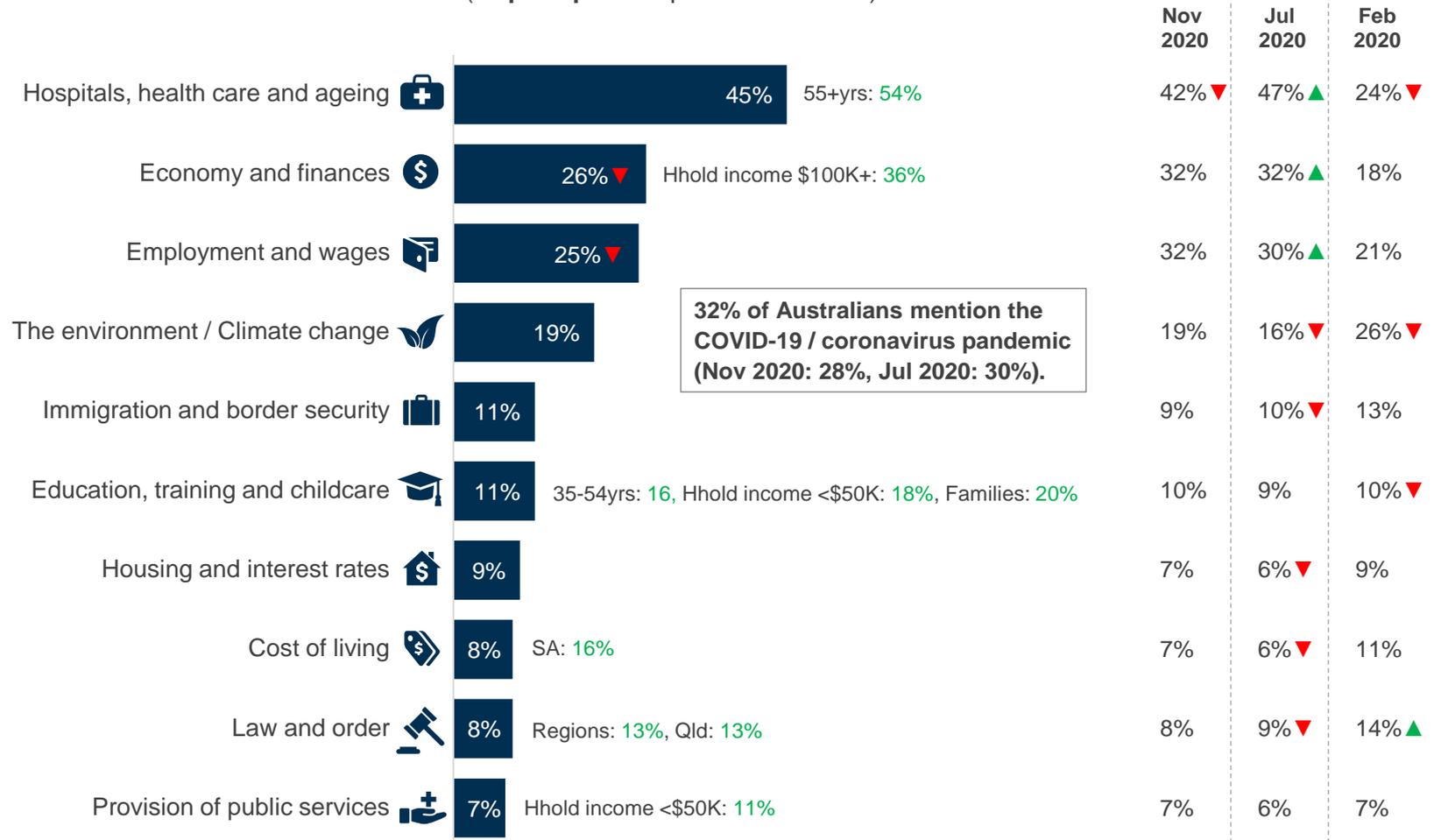
Top of mind concerns are around progressing the COVID-19 recovery and include mentions of the vaccine program and strengthening other elements of our public health response, improving border management and quarantine approaches, and the need for action on economic growth, business support and job creation over the coming months.

Still impacting so many aspects of Australian life, the COVID-19 pandemic is raised as a top three issue or concern by almost one in three adults (32%, similar to 28% in November and 30% in July).



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.

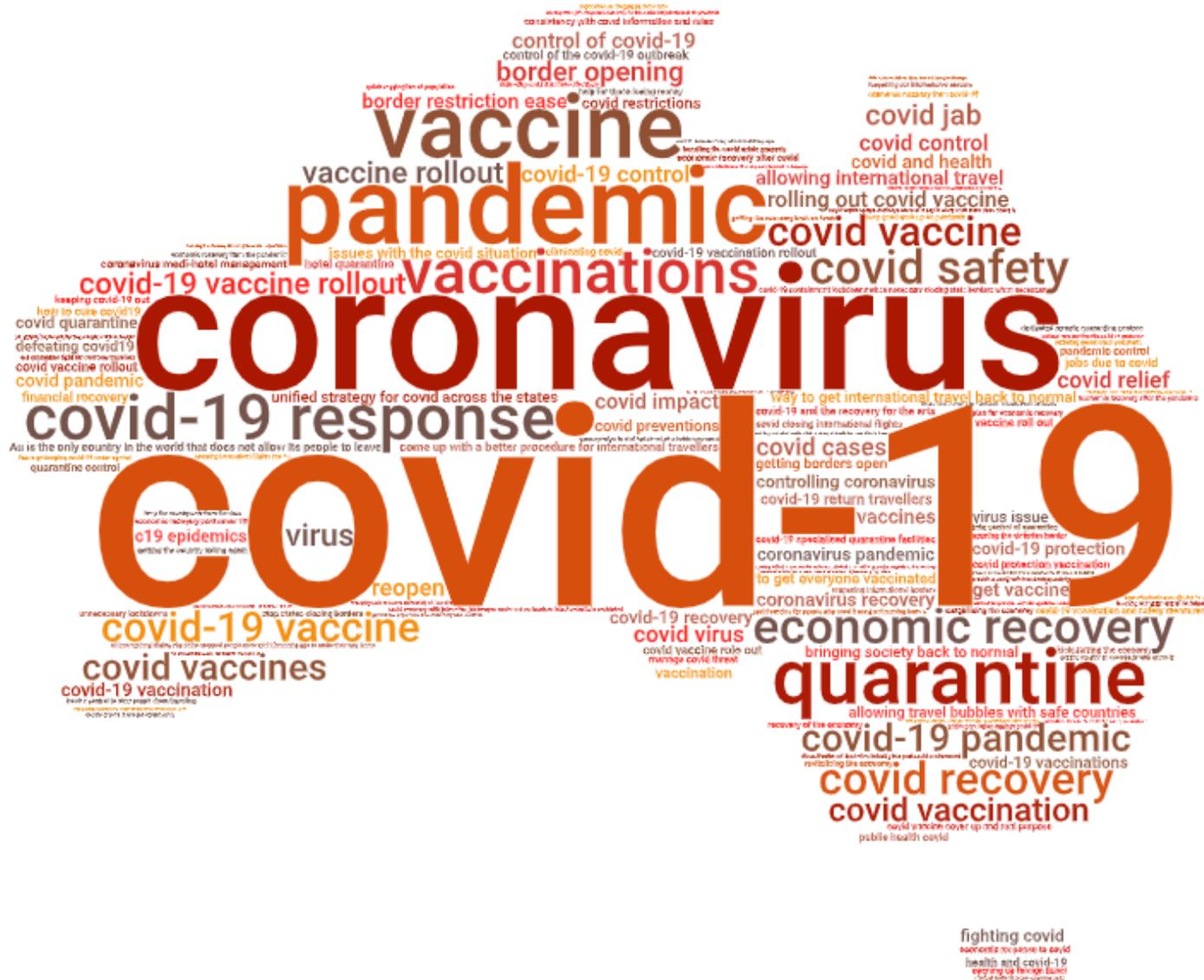
Significantly higher than the national total at the 95% confidence interval.

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 (approximately n=1,000 per wave).

COVID-19 continues to be top of mind for many Australians – verbatim responses



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.

Base: All respondents (approximately n=1,000 per wave).

Healthcare, the economy, employment also lead prompted concerns, in addition to cost of living



Similarly, as Australia's response to the COVID-19 pandemic continues into 2021, hospitals, healthcare and ageing (58%) remains Australians' top prompted priority for Federal Government attention.

This is followed closely by cost of living (53%), with the economy and finances (45%), employment and wages (45%) and the environment and climate change (37%) completing a top five of community concerns which is unchanged since June 2019.

Other key public priorities for Government attention are in line with November 2020. Education, training and childcare (29%), provision of public services (28%), housing and interest rates (26%), immigration and border security (22%), and energy (20%) round out the top ten most important issues to Australians.

In other results, as the impacts of COVID-19 continue into a new year, community, family and social services (19%, up from 14%) has seen a resurgence in community concern after a decline in November.

Generational differences in priorities persist. Younger adults aged 18-34 years have been disproportionately impacted by the economic fallout of COVID-19 and are most concerned about cost of living (57%) and employment and wages (47%). With reports of housing markets bouncing back from a quieter 2020, this age group also continues to be more concerned about housing and interest rates (34%) than older adults.

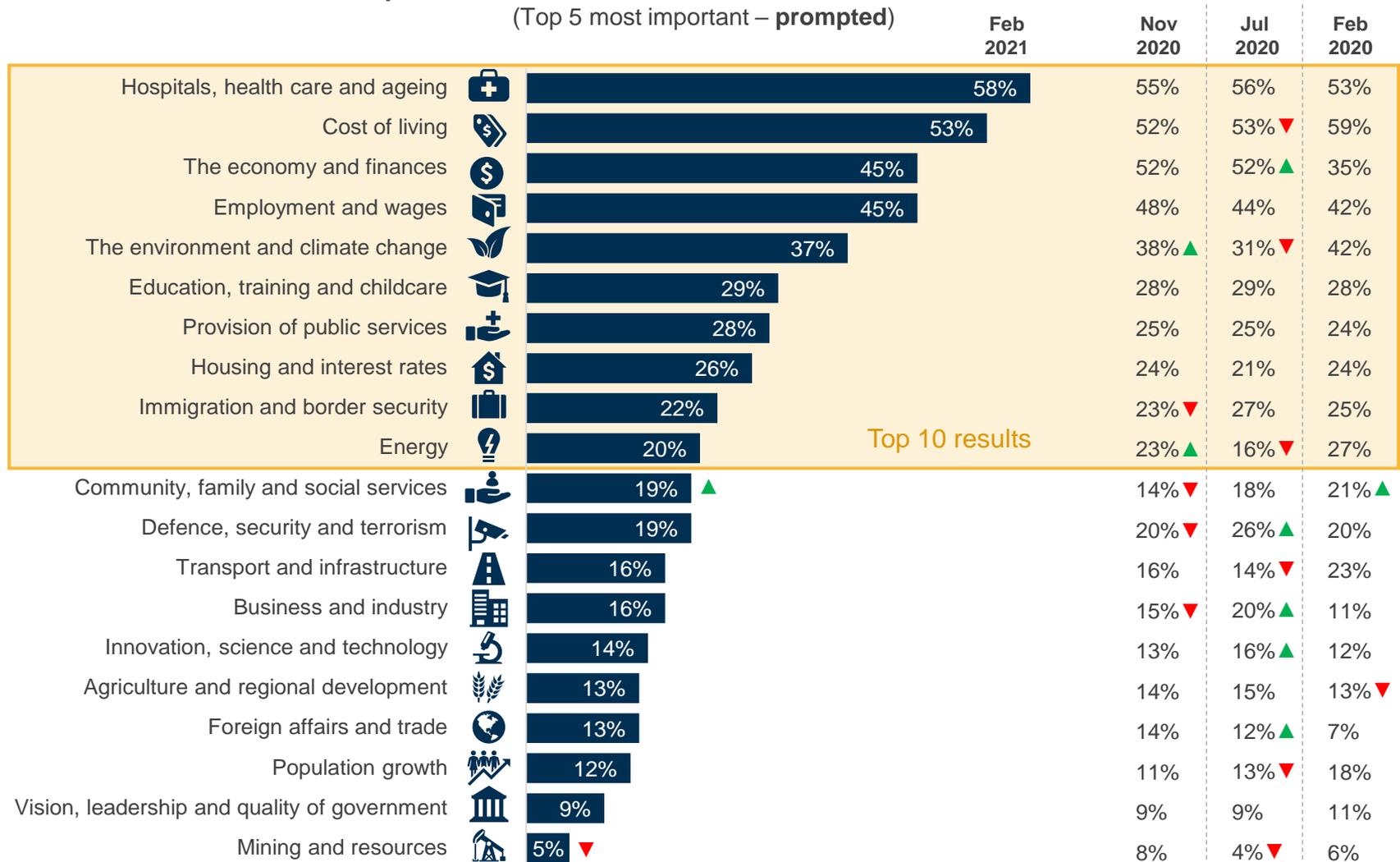
In contrast, hospitals, healthcare and ageing dominates concerns among those aged 55+ years (72%), reflecting their greater vulnerability to the health impacts of COVID-19. The economy and finances (52%) remains their other leading concern.

Those in between, aged 35-54 years and juggling concerns around work, housing, children and older relatives, mostly want Government action on hospitals, healthcare and ageing (61%) and cost of living (57%).

Healthcare and cost of living lead prompted concerns, followed by the economy, employment and the environment



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



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

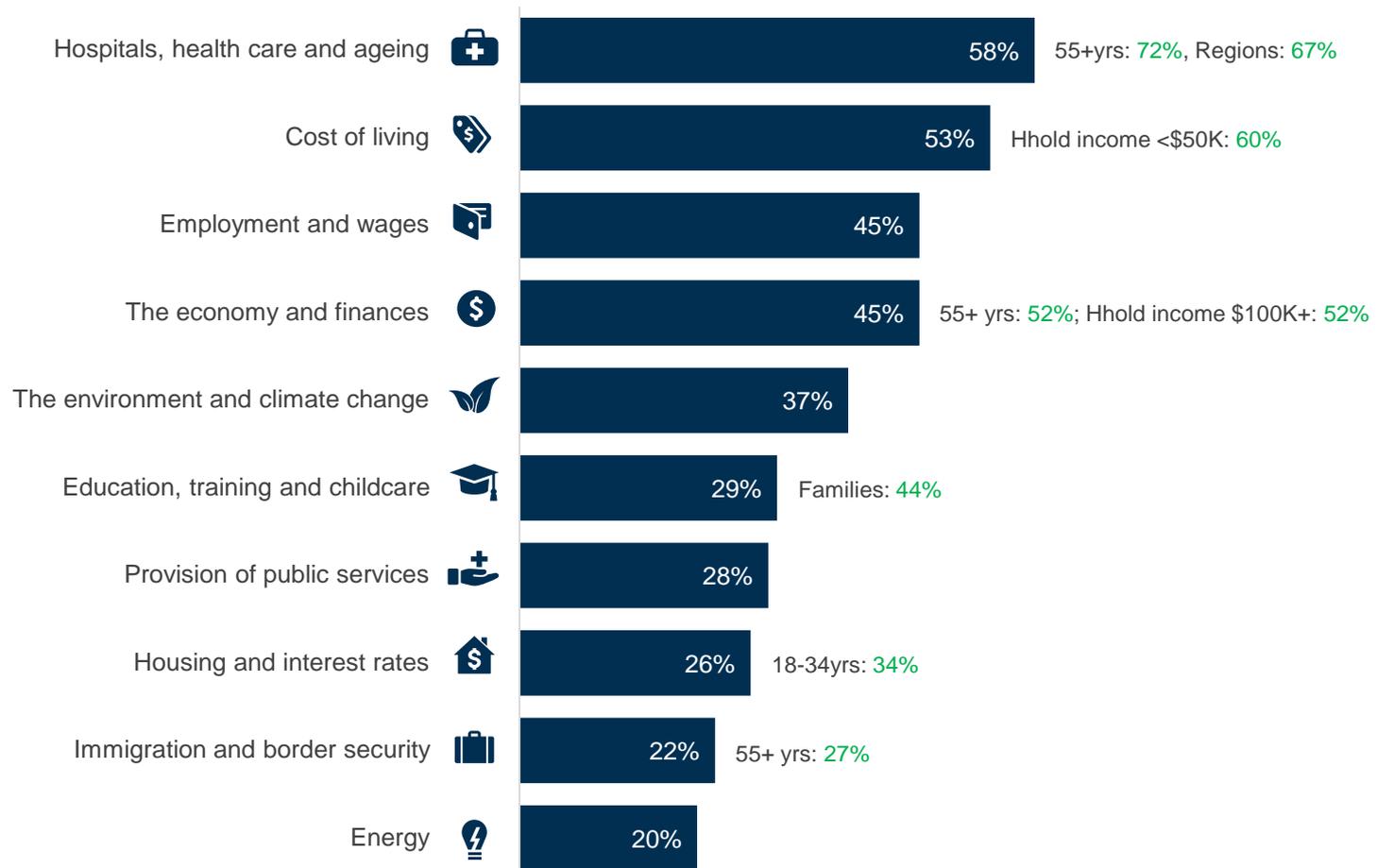
Q. From the following list, please select the five most important issues you think the Australian Government should focus on.

Base: All respondents (approximately n=1,000 per wave).

Older adults remain most concerned about healthcare and the economy, while housing remains a key issue for 18-34s



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



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=1,000).

What are Australians' COVID-19 concerns?



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



Similar to July and November 2020, eight in ten Australians (81%) remain concerned about the COVID-19 pandemic. Four in ten (41%) remain extremely or very concerned. Coming straight out of another period of lockdown, Victorians are again most wary (86% concerned), Queenslanders are little more relaxed (71% concerned) and views in other mainland states are in line with the national total.

Most Australians remain concerned about the impact of the COVID-19 pandemic on the Australian economy (85%) but sentiment continues to soften – while 48% are extremely or very concerned about the economy, this is down from 54% in November, and 60% in July 2020.

Two thirds or more Australians continue to have these other leading concerns:

- the impact on trade with other countries (74%)
- the ability of the health system to cope (70%)
- another lockdown due to a second wave (68%)
- not being able to visit family and friends (68%)

Following the recent escape of the UK variant from hotel quarantine into the general community, more Victorians, relative to other states, are extremely or very concerned about getting COVID-19 themselves or

their family or friends getting COVID-19, facing another lockdown and not being able to see family / friends, and the impact on their mental health.

As Australians continue to live with periodic COVID-19 outbreaks, seven in ten (71%) are concerned about their state / territory borders being open and vulnerable to outbreaks in other states and territories and the preferred threshold for the number of active cases at which borders are closed remains low. Similar to November, around one in five adults (19%) 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 (61%) 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 68% believe they should be closed at 50 cases or less and 73% once there are up to 100 active cases.

Preferences continue to vary significantly by state, with 44% of WA residents saying their borders should close to states and territories with any active cases. In contrast, almost one in four NSW residents (24%) say the threshold for border closures should be 100 active cases or higher, and 10% say borders should not be closed at all.



Australians positive about the local response to COVID-19

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: 79% and 72% respectively, rate these as 'very good' or 'good'. They also continue to feel positive about the response of Australians generally (59% 'very good' or 'good').

Overall, Australians remain largely positive about the response of their State and Territory Governments (64% 'very good' or 'good') but opinion continues to soften on the Federal Government response (56% 'very good' or 'good', compared with 60% in November and 66% in July 2020).

Across the mainland states, WA and SA remain most positive about their State Government's performance: 80% and 78% of residents respectively, rate this as 'very good' or 'good'.

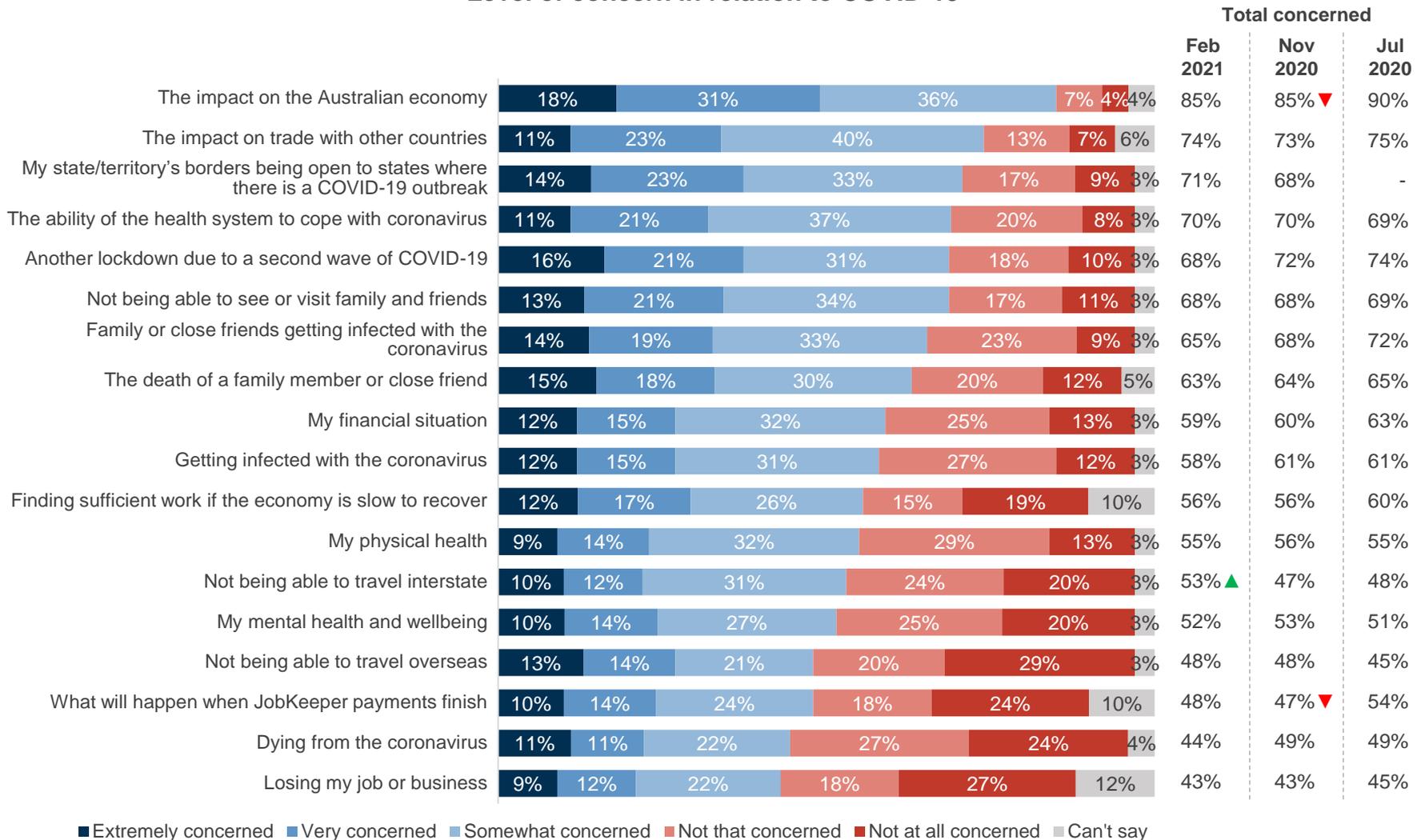
In contrast, slightly fewer Victorians rate their Government's performance as 'very good' or 'good' (49%, compared with 57% in November), with more than one in four now rating it as 'very poor' or 'poor' (27%, up from 22%). This represents a return to July levels, after a slight improvement in November, and reflects negative public sentiment around the management of hotel quarantine and recent lockdown.

Ratings of business and industry and local council responses to COVID-19 remain relatively steady at 50% and 45% 'very good' or 'good', respectively.

Australians remain most concerned about the impact of COVID-19 on our economy and international trade



Level of concern in relation to COVID-19

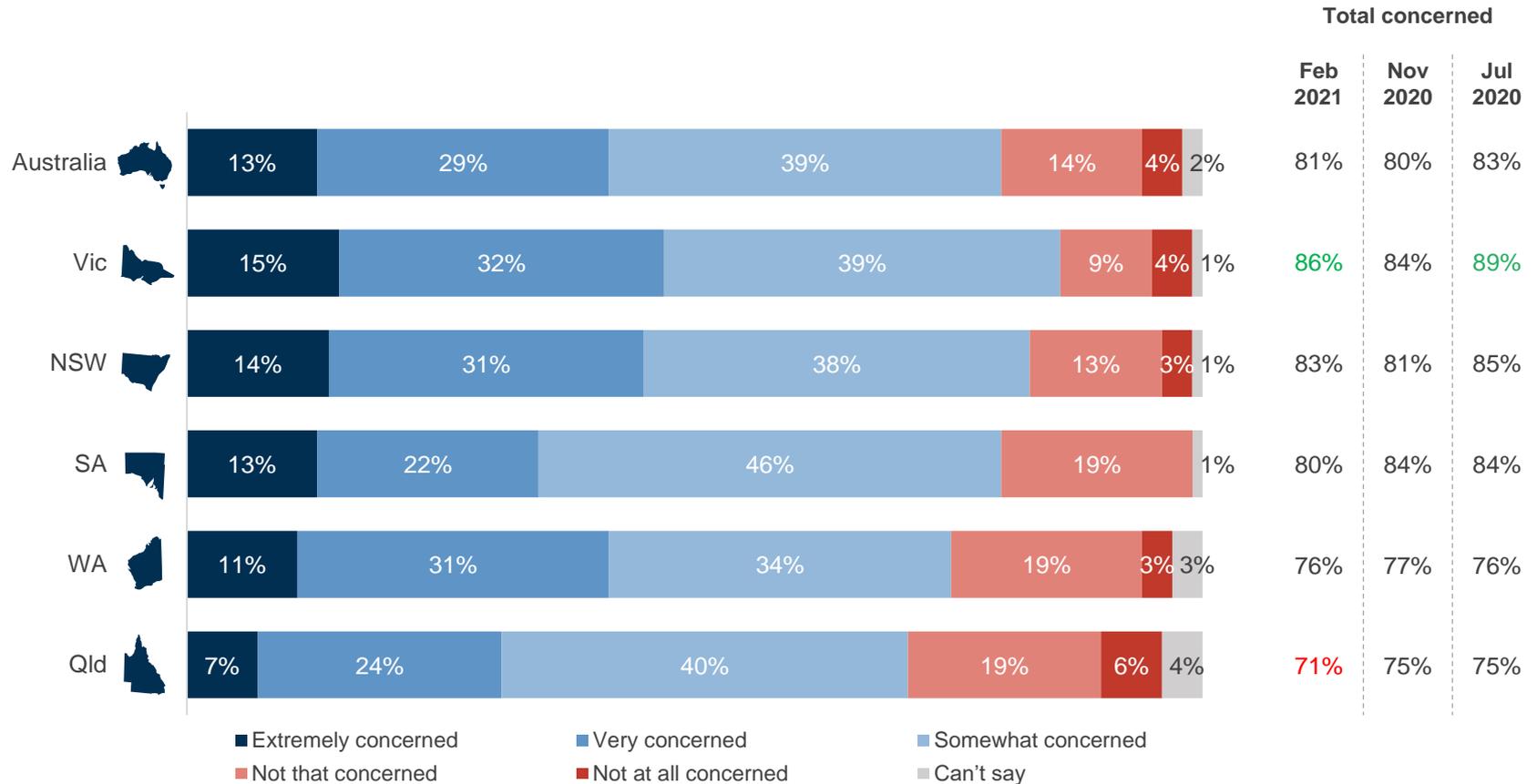


Significantly ▲ higher / ▼ lower than previous True Issues wave at the 95% confidence interval.
 Q. Please rate your level of concern with each of the following considerations in relation to the COVID-19 coronavirus.
 Base: All respondents (approximately n=1,000 per wave).

Eight in ten Australians remain concerned about the COVID-19 pandemic, with concern highest among Victorians



Overall concern about the COVID-19 pandemic

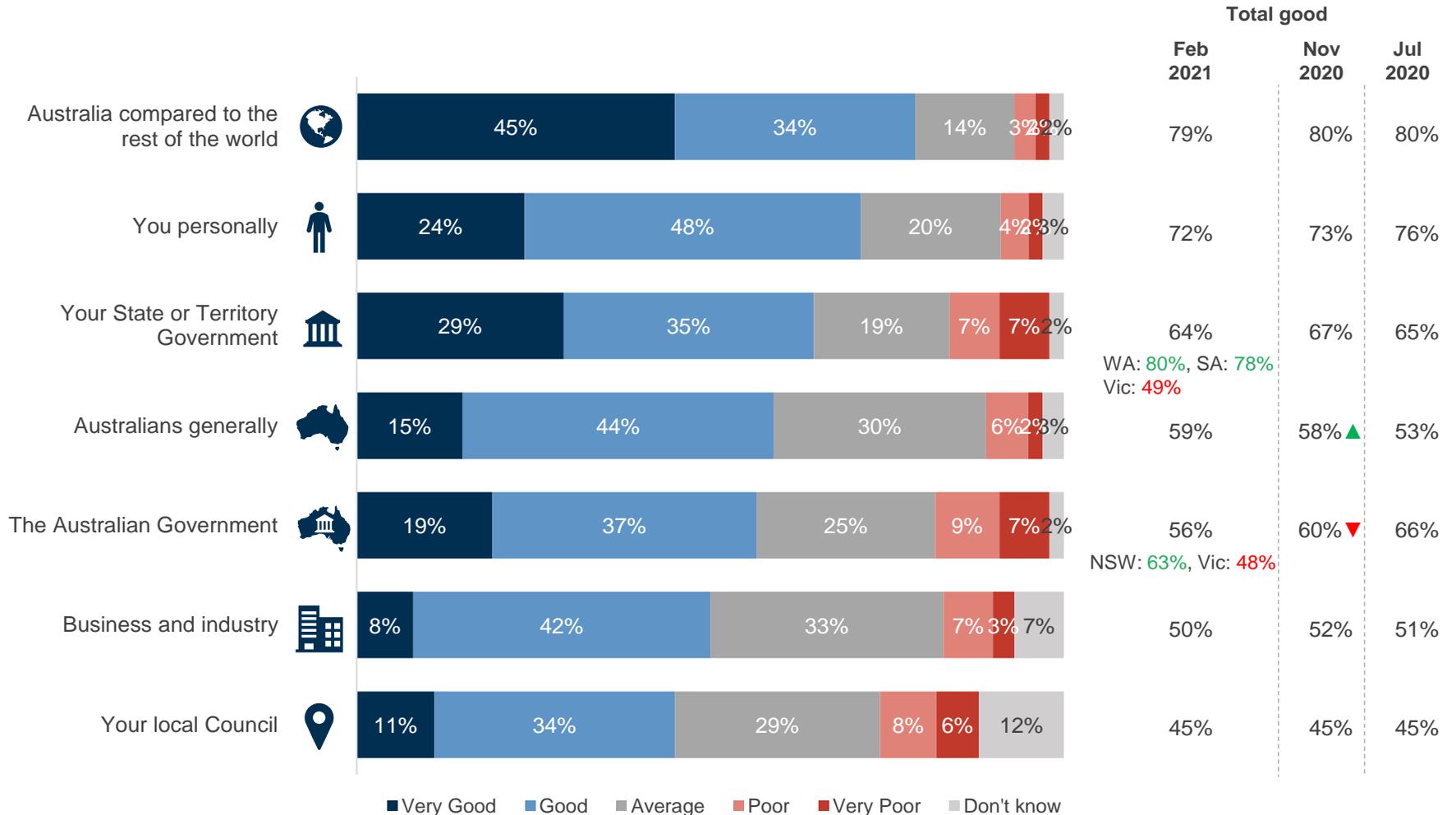


Significantly higher / lower than the national total at the 95% confidence interval.
 Q. And how concerned are you overall about the COVID-19 coronavirus pandemic?
 Base: All respondents (approximately n=1,000 per wave).

Australians remain more positive about State / Territory Government responses than the Federal Government's



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

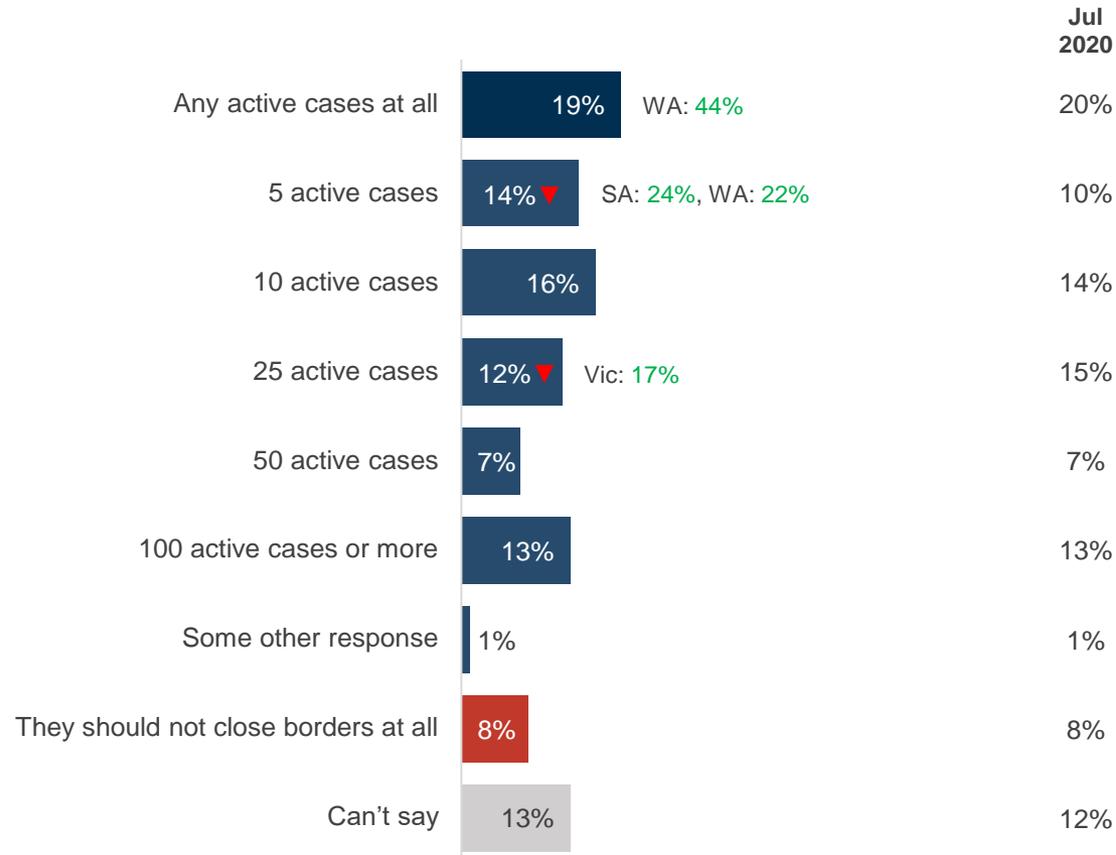


Significantly higher / lower than the national total at the 95% confidence interval.
 Significantly ▲ higher / ▼ lower than previous True Issues wave at the 95% confidence interval.
 Q. How would you rate the response to the COVID-19 coronavirus of each of the following groups?
 Base: All respondents (approximately n=1,000 per wave).

Around one in five adults continue to feel an 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.

Significantly **▼** lower than previous True Issues wave 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 (approximately n=1,000 per wave).

A majority of Australians plan to be vaccinated as it's the 'right thing to do' but safety and side effects are concerns



Following the launch of the COVID-19 vaccination program, six in ten Australians (64%) say they plan to have a vaccine when it becomes available to them, including almost four in ten (39%) who definitely plan to. However, a further one in five are undecided (4%) or would need further information (17%), and 15% say they do not plan to have a vaccine (including 6% who 'definitely' do not plan to).

While a majority of the most vulnerable cohort aged 55+ years 'definitely' plan to have a COVID-19 vaccine (55%), younger adults – still some months away from vaccination – are much less firm in their plans (31% 'definitely' plan to have one).

Women and 35-54 year olds appear most uncertain about the vaccines – with slightly higher levels of indecision or needing more information and slightly lower levels of intention to be vaccinated, relative to men and other groups.

Questions around vaccine safety, particularly in relation to pregnancy and fertility, may be impacting attitudes among women, however public debate around the efficacy of different vaccines may also be contributing to younger adults' uncertainty.

While a majority (63%) of older adults say the specific vaccine they are offered will not influence whether they get vaccinated, opinion is more mixed among 35-54 year olds, and almost four in ten 18-34 year olds (39%) say the specific vaccine they are offered will influence whether they get vaccinated.

Still, six in ten Australians agree getting vaccinated is 'the right thing to do' (66%), that the vaccines will make us safer (63%) and help us get back to a new 'normal' (62%). A majority also agree they will stop us from getting and spreading COVID-19 (53%), or becoming as sick if we do (56%).

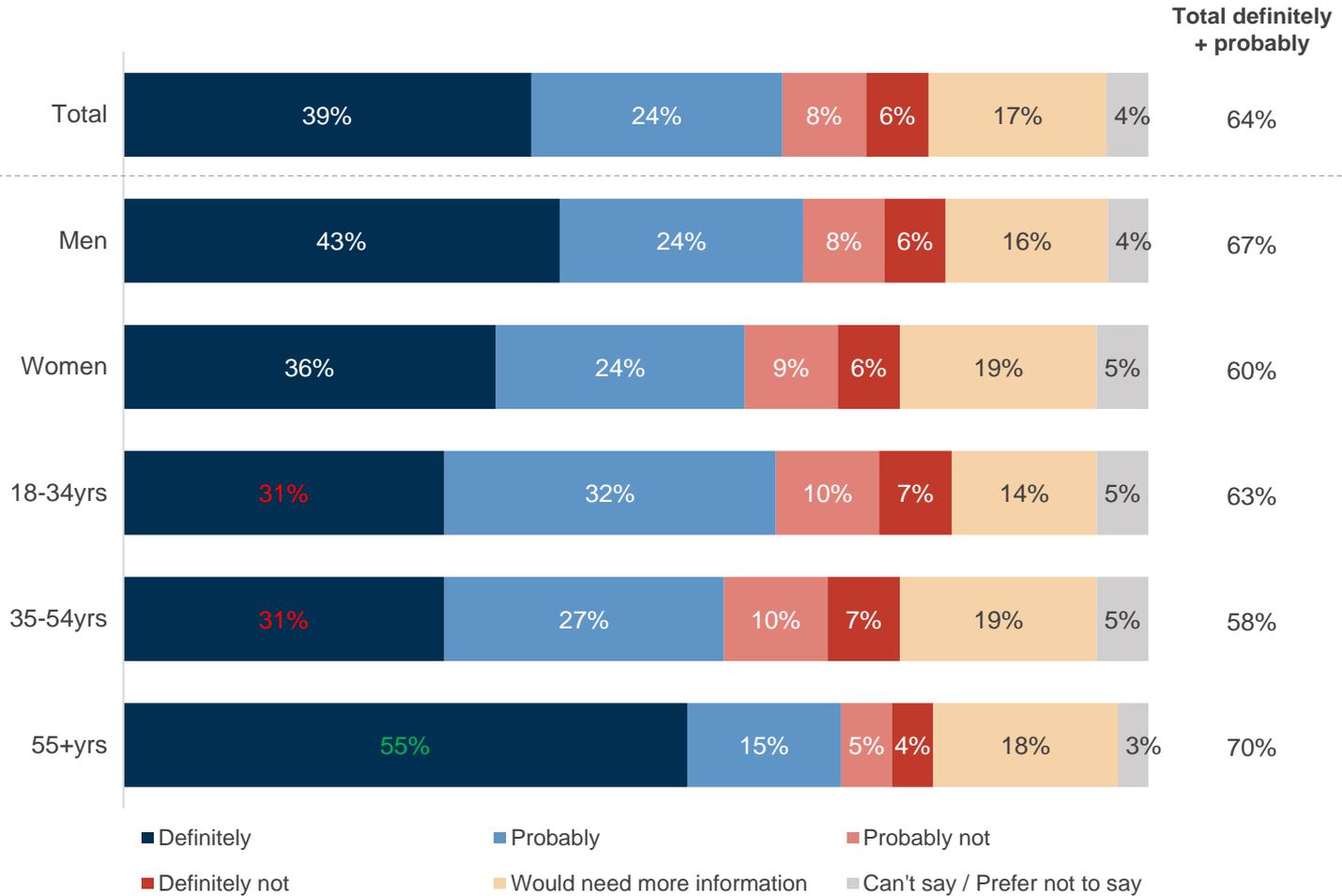
However, despite widespread recognition of the vaccines' potential benefits, particularly among older adults aged 55+ years, many Australians are concerned about their safety and side effects (58%) and that the trials and approval processes have been too rushed (52%).

These concerns are significantly stronger among women (66% and 60% agreement, respectively), further explaining their greater uncertainty about having a COVID-19 vaccine.

Almost two thirds of Australians intend to have a COVID-19 vaccine when available – but less certainty among 18-54s



Plan to have COVID-19 vaccine when available

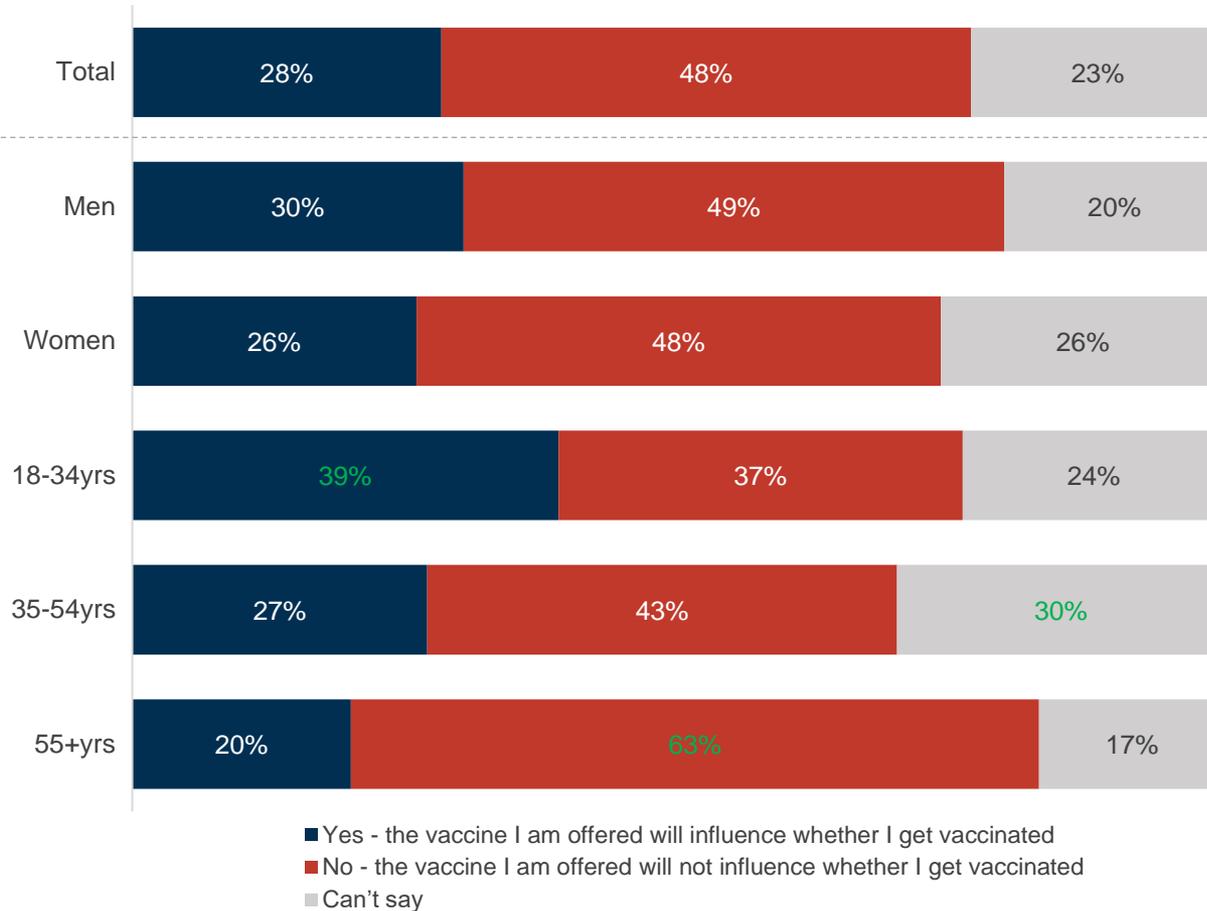


Significantly higher / lower than the national total at the 95% confidence interval.
 Q. Do you plan to have a COVID-19 vaccine when it becomes available to you?
 Base: All respondents (n=1,000).

The vaccine people are offered may impact their decision to vaccinate – especially among younger adults



Influence of specific COVID-19 vaccine offered on decision to have vaccine



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

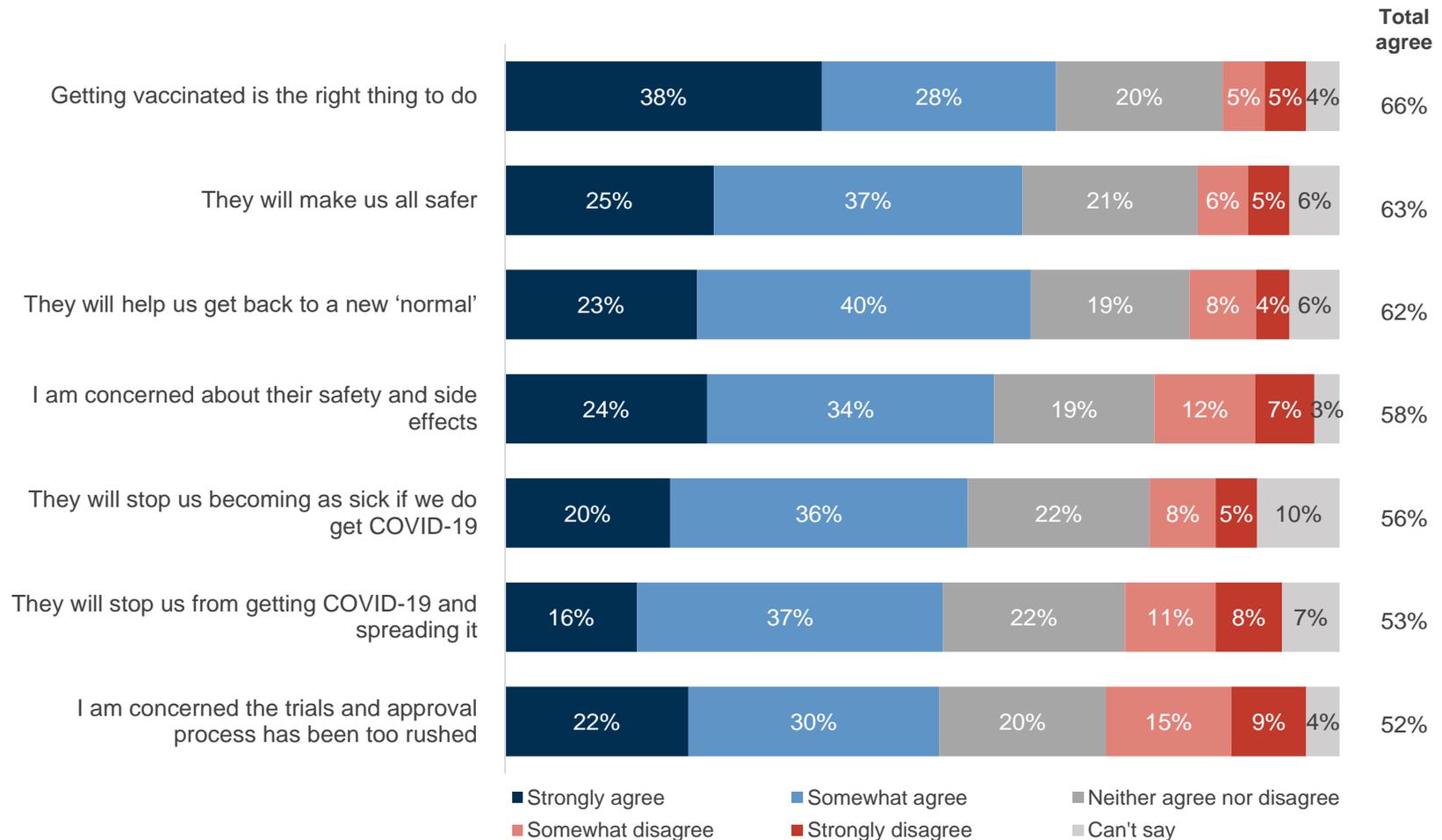
Q. Australia will have doses of at least two different COVID-19 vaccines, but people will not be able to choose which of the vaccines they receive. Will the specific vaccine you are offered influence your decision to have a COVID-19 vaccine?

Base: All respondents (n=1,000).

Australians think getting vaccinated is the right thing to do to return us to ‘normal’ life but have some safety concerns



Agreement with statements about the COVID-19 vaccine

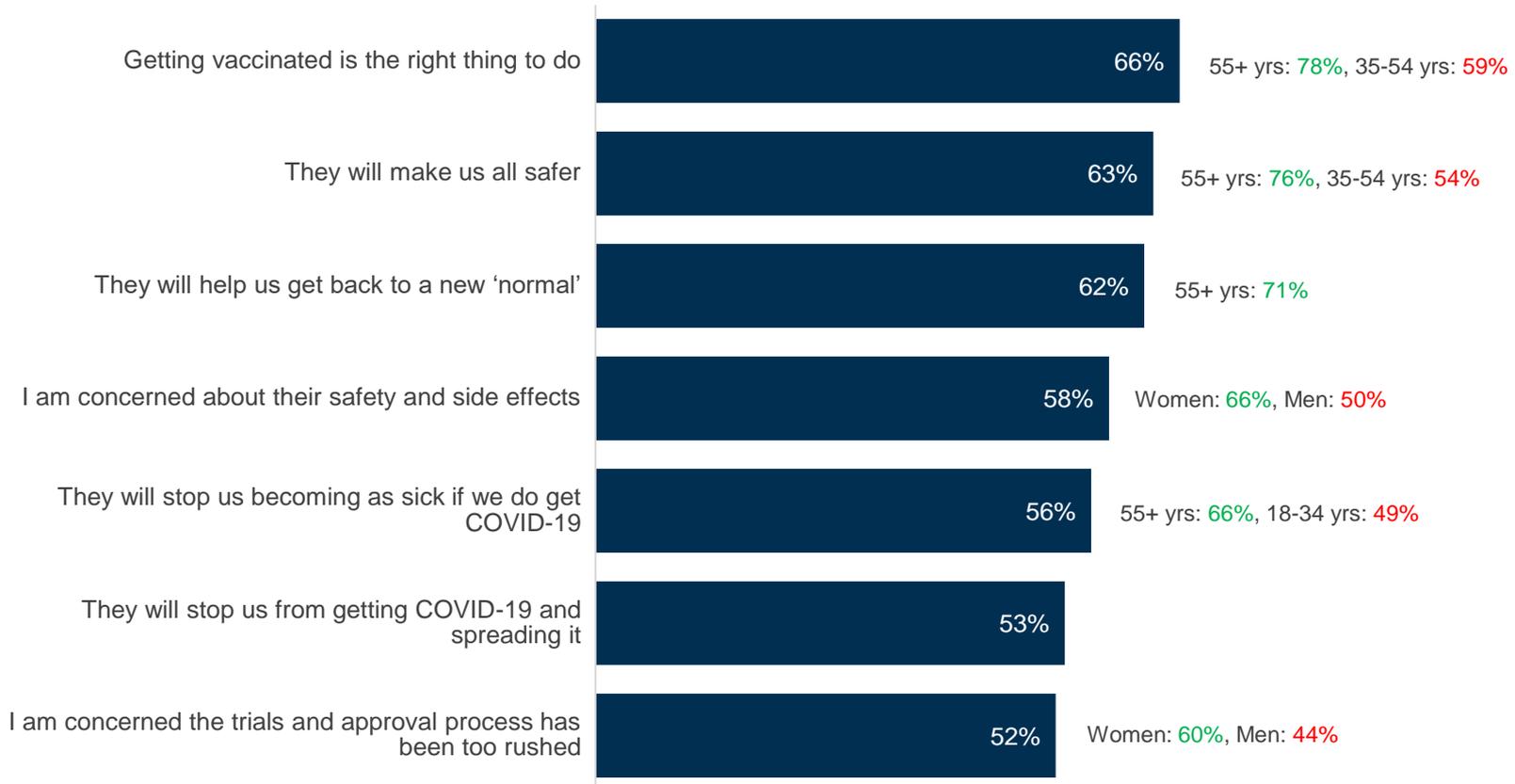


Q. Do you agree or disagree with the following statements about the COVID-19 vaccines?
 Base: All respondents (n=1,000).

Older adults are most positive about the benefits of COVID-19 vaccines while women are most concerned about safety



Agreement with statements about the COVID-19 vaccine
(Total 'strongly' + 'somewhat' agree)



Significantly higher / lower than the national total at the 95% confidence interval.
Q. Do you agree or disagree with the following statements about the COVID-19 vaccines?
Base: All respondents (n=1,000).



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

Australians see themselves, their community, business and our economies as heading in the right direction in 2021



Despite ongoing disruption to their lives due to COVID-19, Australians continue to feel optimistic about the future. They remain most positive about their own personal situation: 43% feel they are heading in the right direction (up from 39% in November), almost three times those who feel they are heading in the wrong direction (15%).

Similarly, Australians remain confident about their local community: 37% feel it is heading in the right direction (similar to 35% in November), more than double those who feel it is heading in the wrong direction (16%).

Despite COVID-19 lockdowns over the summer months, the re-opening of businesses and return of workers to their workplaces has seen the increased optimism around business and industry maintained (31% right direction, similar to 29% in November but higher than 25% in July). Few adults now feel it is heading in the wrong direction (17%, unchanged from November but lower than 23% in July).

Public confidence in the national economy continues its upward trend. More Australians see the economy heading in the right direction (33%, up from 28% in November) and few see it heading in the wrong direction (23%, similar to 26% in November but lower than 33% in July).

Confidence in state and territory economies remains stronger by comparison. Least disrupted by COVID-19, a majority of WA residents (63%) continue to see their state economy as heading in the right direction.

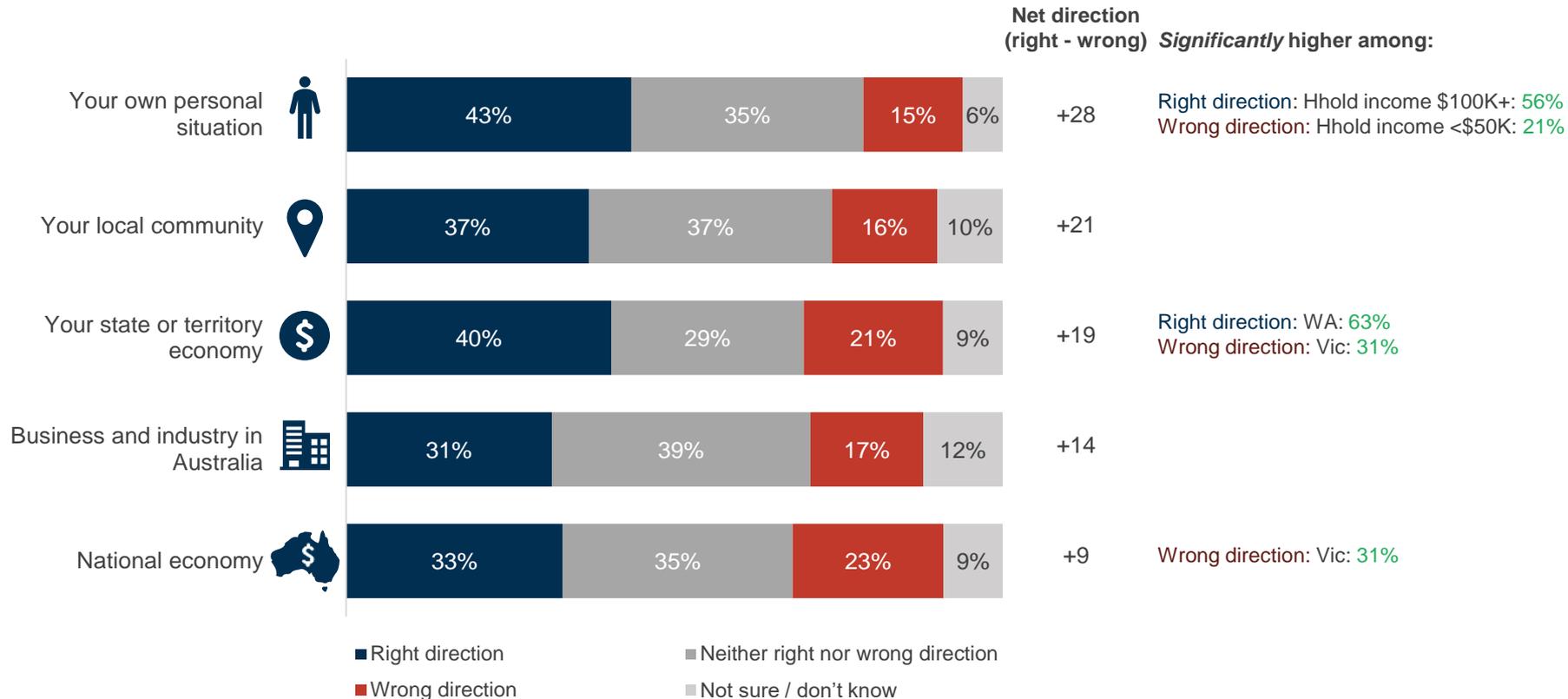
Residents of most other mainland states also continue to be optimistic. In NSW, Queensland and SA, more residents continue to feel their state economy is heading in the right direction than feel it is heading in the wrong direction.

However, fresh from another lockdown, opinion is mixed in Australia's most COVID-19 impacted state. In November, at the end of Victoria's second wave and looking ahead to a 'COVID normal' summer, its residents were optimistic about 2021. However, opinion has shifted in February: 32% feel their economy is heading in the right direction (compared to 38% in November) and a similar proportion (31%) see it heading in the wrong direction (compared to 25% in November).

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



Direction of organisations and groups in Australia

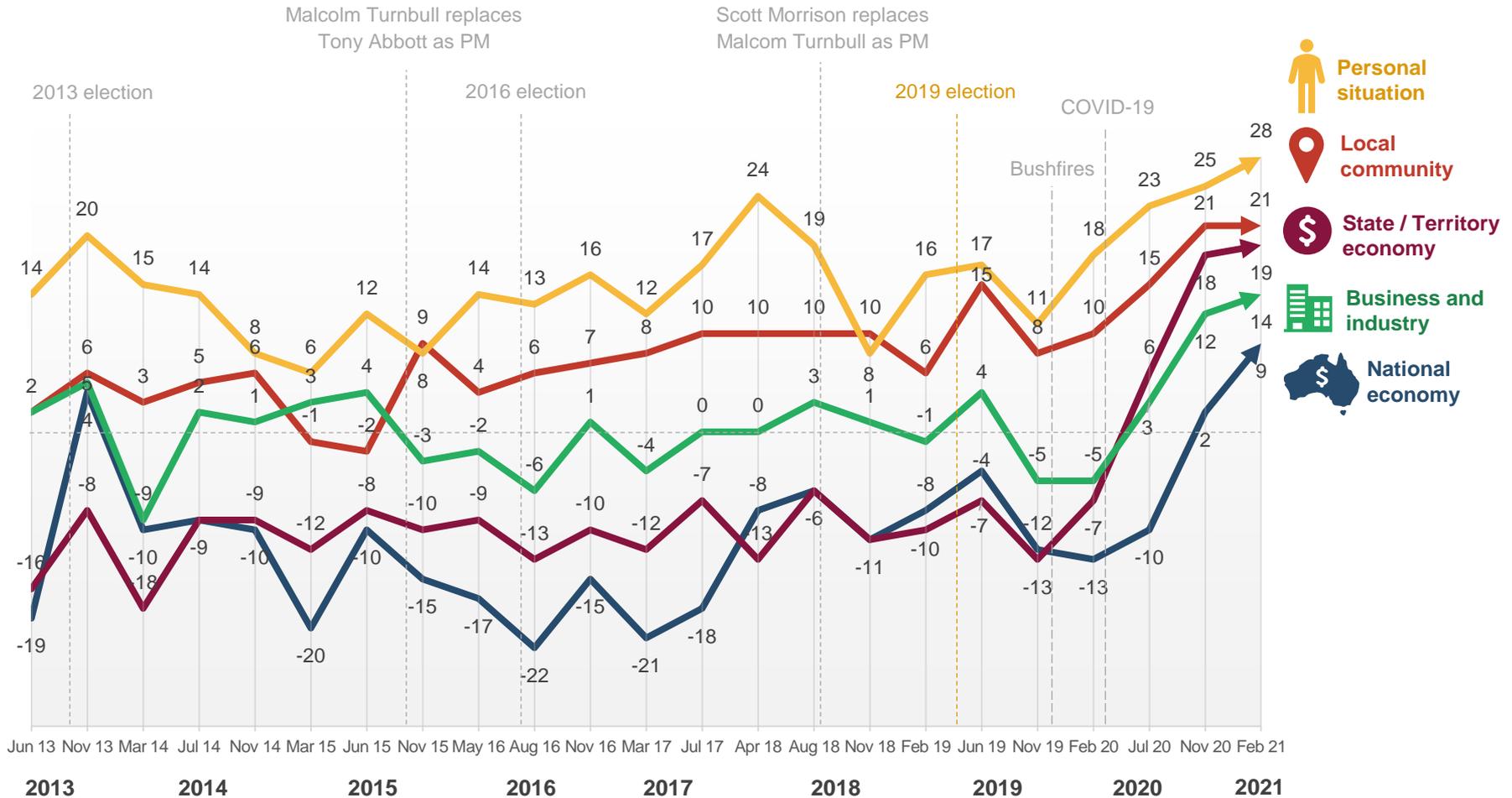


Significantly higher than the national total at the 95% confidence interval.
 Q. Do you think each of the following is generally headed in the right or the wrong direction?
 Base: All respondents (n=1,000).

Australians continue to feel more optimistic about national and state economies, business and their own situation



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 (approximately n=1,000 per wave).

How does the Australian Government perform on top issues?

Government performance remains strongest on security, slightly weaker on leadership after earlier COVID-19 boost



Federal Government performance ratings across key areas are little changed since November. The exception is vision and leadership (index score of 48), which has declined four points from its November and July 2020 peak but remains significantly higher than pre-COVID-19 levels (index of 40 in February 2020).

This change follows the response of Prime Minister Scott Morrison to sexual assault allegations made by multiple Liberal Party staffers against a colleague. It also comes amid public debate around the Federal Government's role in the COVID-19 response, relative to the work being done by State and Territory Governments.

Other small but notable declines in Government ratings have occurred in three of its poorer performing areas, with the environment and climate change (index of 44), housing and interest rates (index of 48), and population growth (index of 50) each down two points since November.

On a more positive note, defence, security and terrorism remains the Morrison Government's best rated performance area overall and the only area to increase by more than one index point from four months ago (index of 61, up from 59 in November and similar to 60 in July).

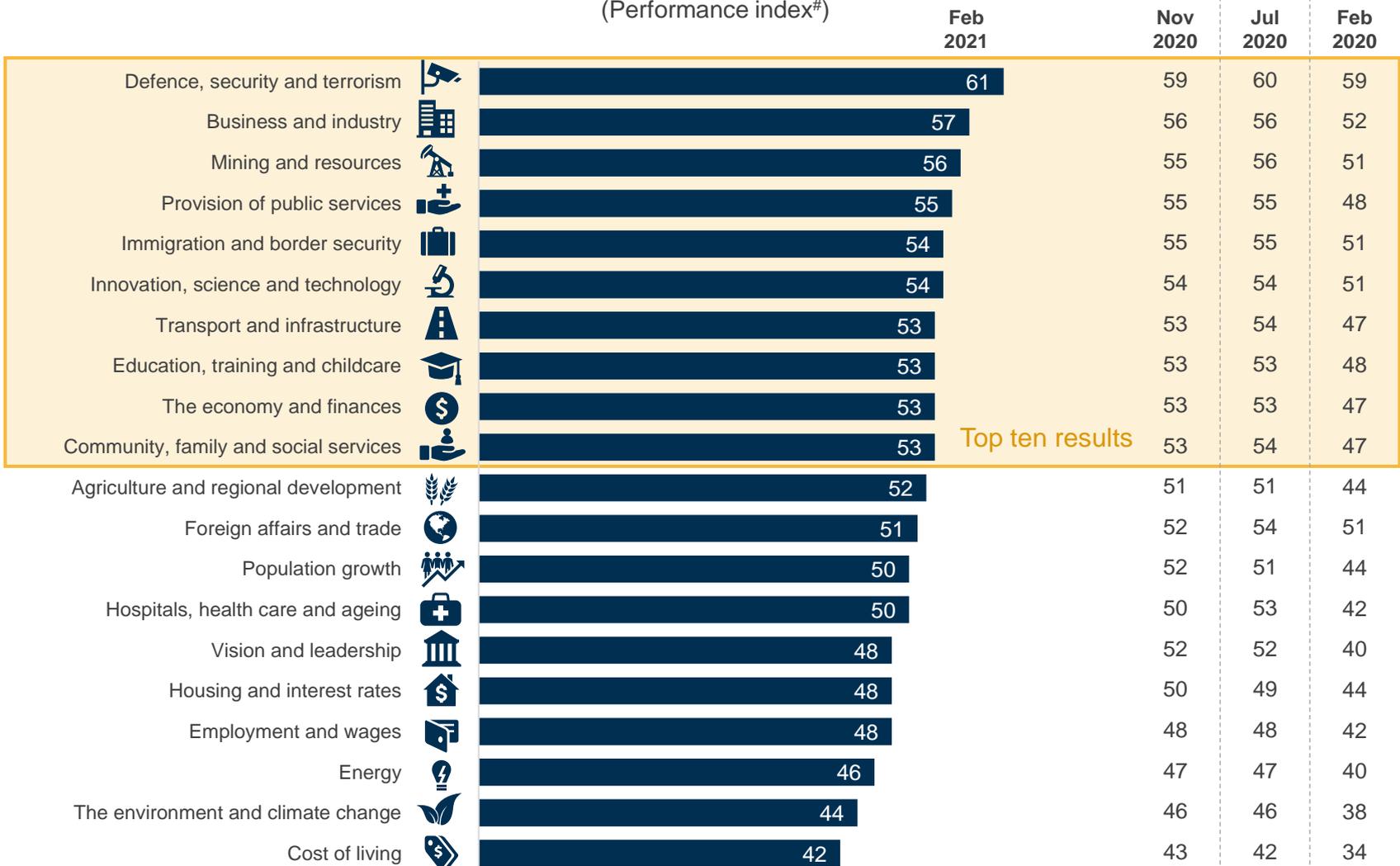
This is a positive result, noting that the last True Issues poll was taken in the immediate aftermath of the Inspector General of the Australian Defence Force's report into conduct of Australian SAS officers in Afghanistan. The relative stability of this performance rating over July 2020 to February 2021 suggests that any negative public sentiment toward the defence force, stemming from this report, has not extended to perceptions of Government performance in this area.

The Morrison Government also continues to perform well in areas such as business and industry (index of 57), mining and resources (index of 56), provision of public services (index of 55), immigration and border security, and innovation, science and technology (index of 54 for each), while cost of living (index of 42) and energy (index of 46) remain among its poorer performing areas.

Government performance slightly stronger on security but leadership weaker after July-November peak



Australian Government performance on issues (Performance index#)

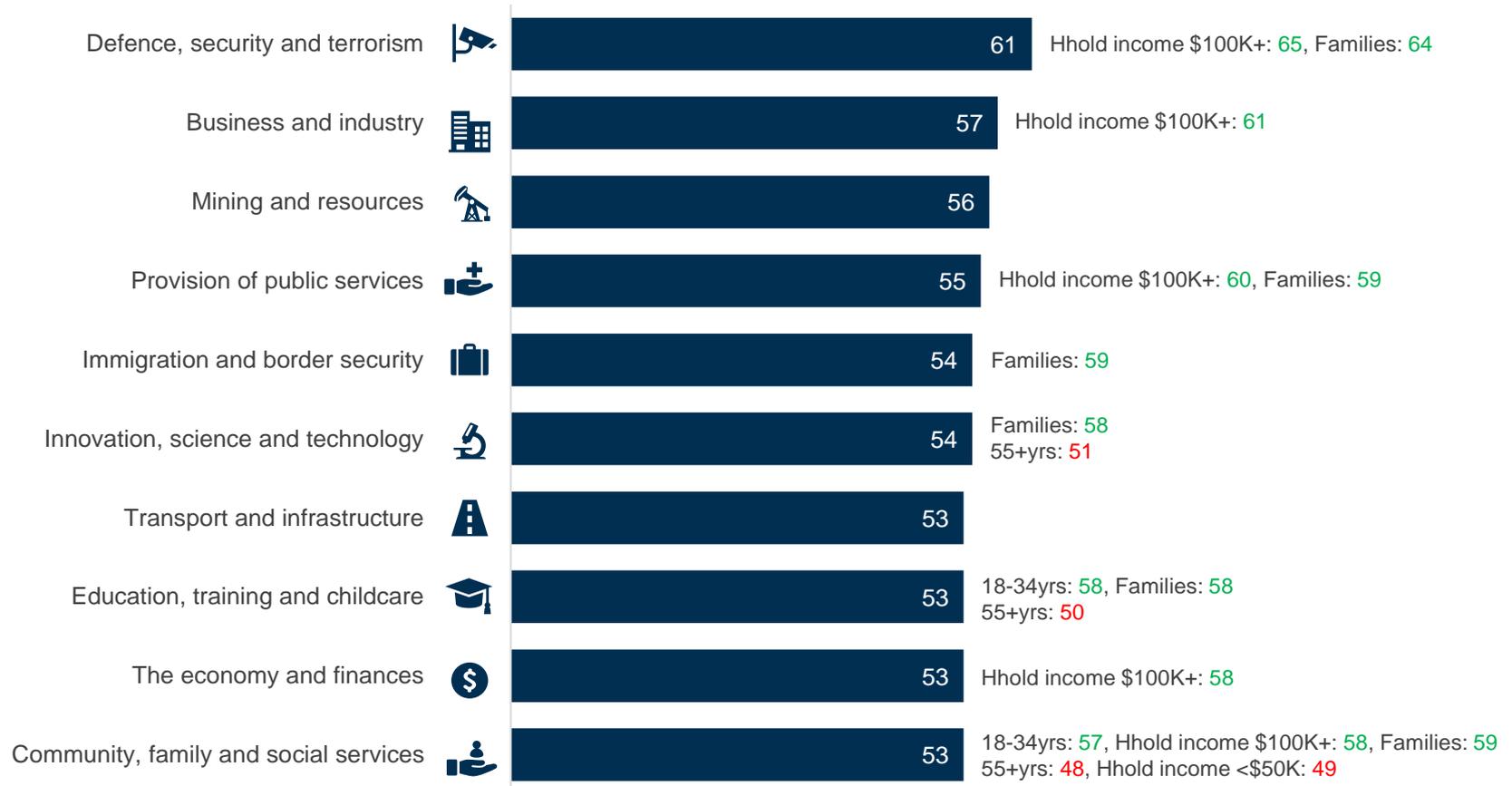


#For an explanation of how index scores are calculated refer to the survey methodology section of this report.
Q. How would you rate the performance of the Australian Government on each of the following issues?
Base: All respondents (approximately n=1,000 per wave).

Younger adults rate Government performance more favourably on education and training, community services



Top ranked issues for Australian Government performance (Performance index#)



#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 (approximately n=1,000 per wave).



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

Federal Government performance has declined from its November peak but remains above pre-COVID-19 levels



Despite falling from a series high index score of 62 in November, the Federal Government's performance continues to rate above pre-COVID-19 levels at an index score of 58.

The number of Australians who rate this Government's performance as 'very good' or 'good' continues a downward trend since July (49%, down from 53% in November and 58% in July) but remains substantially higher than February 2020 (28%).

While more Australians now rate the Morrison Government's performance as 'very poor' or 'poor' (18%, up from 14% in November), this is still well below pre-COVID-19 levels (34% in February 2020). 'Average' Government performance ratings are unchanged from November (31%).

Overall, State and Territory Governments have maintained their positive performance rating as a result of their COVID-19 response (index of 62, similar to 64 in November), as have business and industry (index of 57, unchanged) and local councils (index of 55, unchanged).

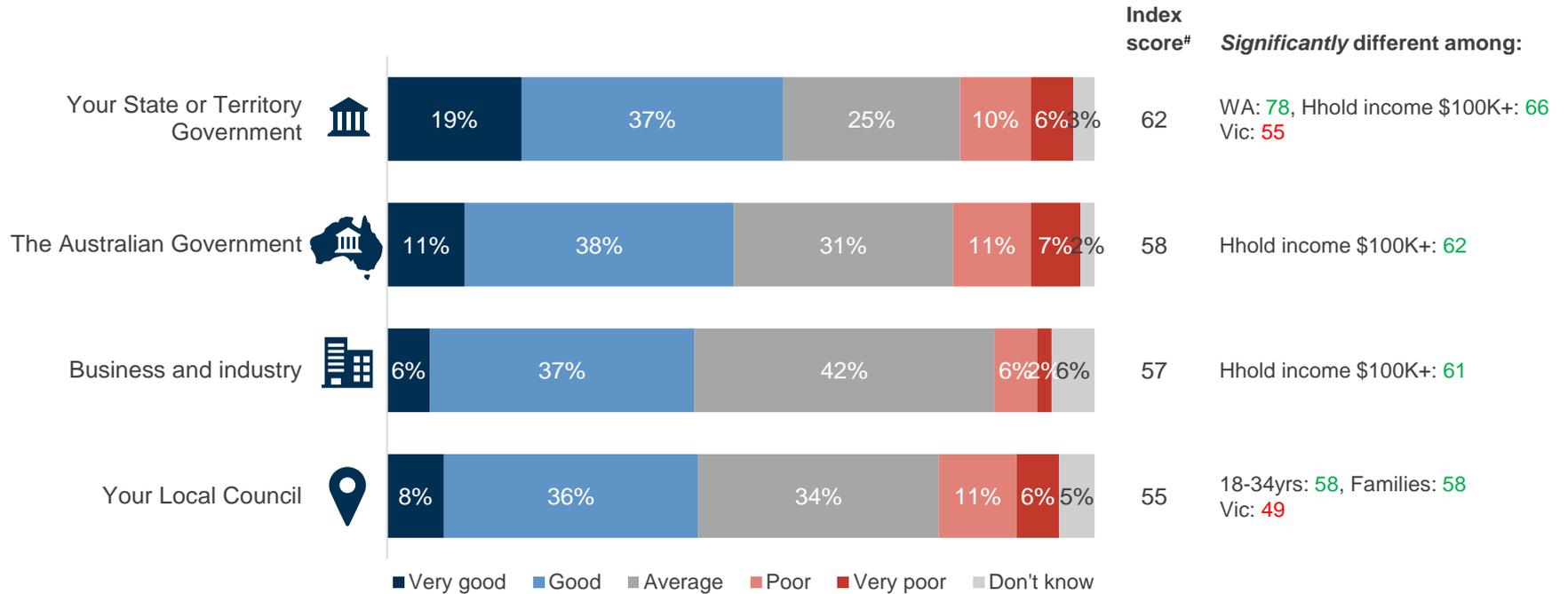
Similar to November and July 2020, the WA State Government continues to outperform other states, with a performance index score of 78.

The rated performance of State Governments in SA (index of 62), NSW (index of 61) and Queensland (index of 60) are in line with the national average, however Victoria has again fallen back below other states (index of 55, down from 60 in November), following another hotel quarantine breach and community lockdown.

State and Territory Governments continue to outperform the Federal Government and 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.

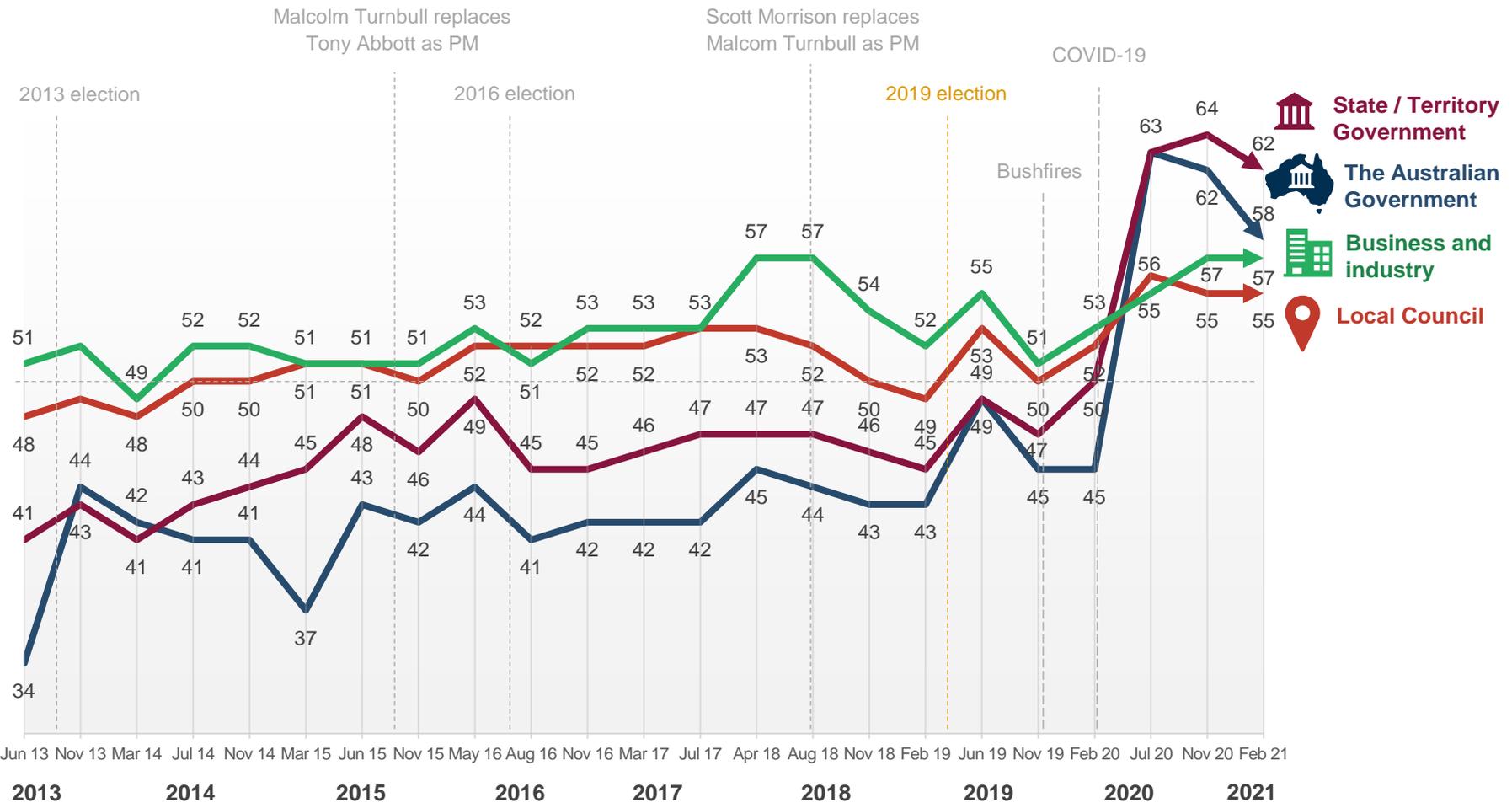
Q. How would you rate the current performance of each of the following organisations or groups in Australia?

Base: All respondents (n=1,000).

Federal Government performance has declined since November but still higher than pre-COVID-19



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 (approximately n=1,000 per wave).

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