



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

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

**TRUE ISSUES®**

**JULY 2021**



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## Survey methodology



### National Online Survey

#### n=1,000 Australian adults

- Conducted Thursday 15<sup>th</sup> – Monday 19<sup>th</sup> July 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%	-	-
<b>Index score</b>			<b>43</b>



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

# With much of Australia in lockdown, healthcare dominates concerns, followed by the economy, environment and jobs

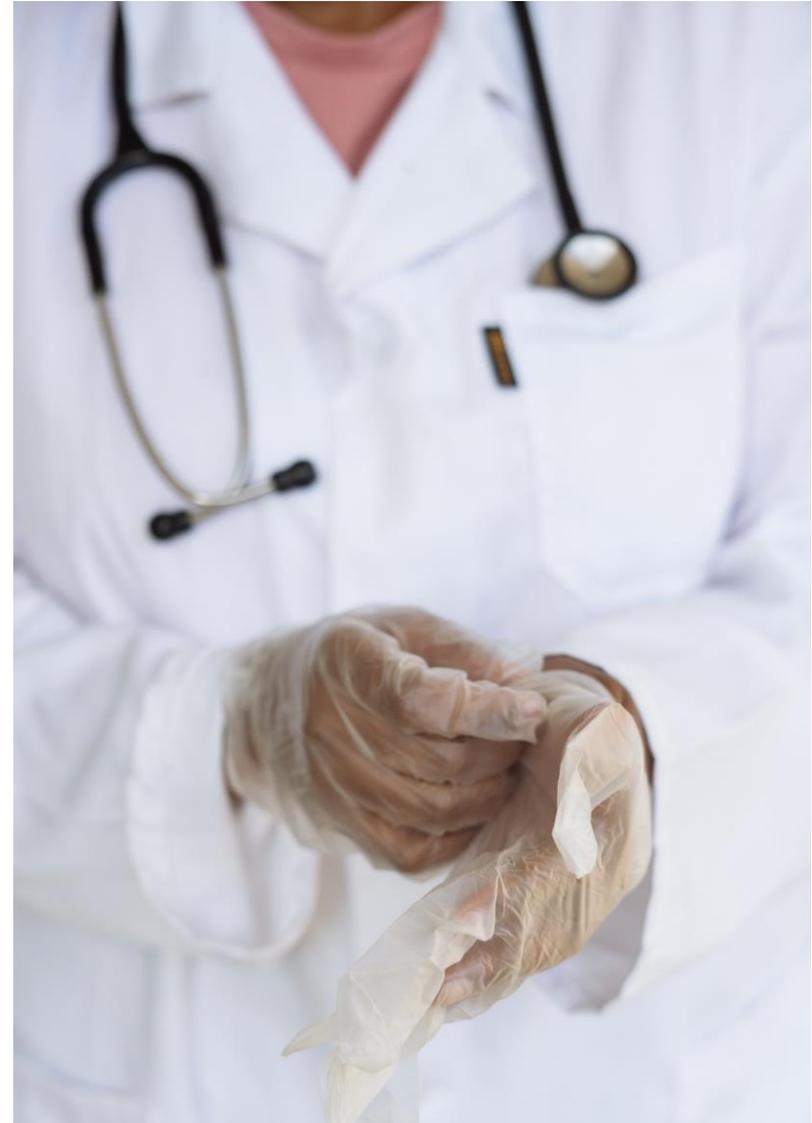


With Australia now into its second year of responding to the COVID-19 global pandemic, healthcare remains the dominant community concern, even more so than earlier in the pandemic. In July 2021, when asked to name up to three issues that personally interest or concern them the most, and that the Australian Government should focus on, a majority of adults (59%) describe issues related to hospitals, healthcare and ageing, up from 45% in February this year.

The economy and finances (21%), environment and climate change (20%) and employment and wages (19%) continue to round out the top four issues – with the economy and employment again less top of mind than they were in 2020.

With much of Australia's population subject to winter lockdowns or other restrictions, and the vaccine rollout under ongoing scrutiny, the COVID-19 pandemic is raised as a top three issue or concern by almost half of adults (47%, higher than 32% in February).

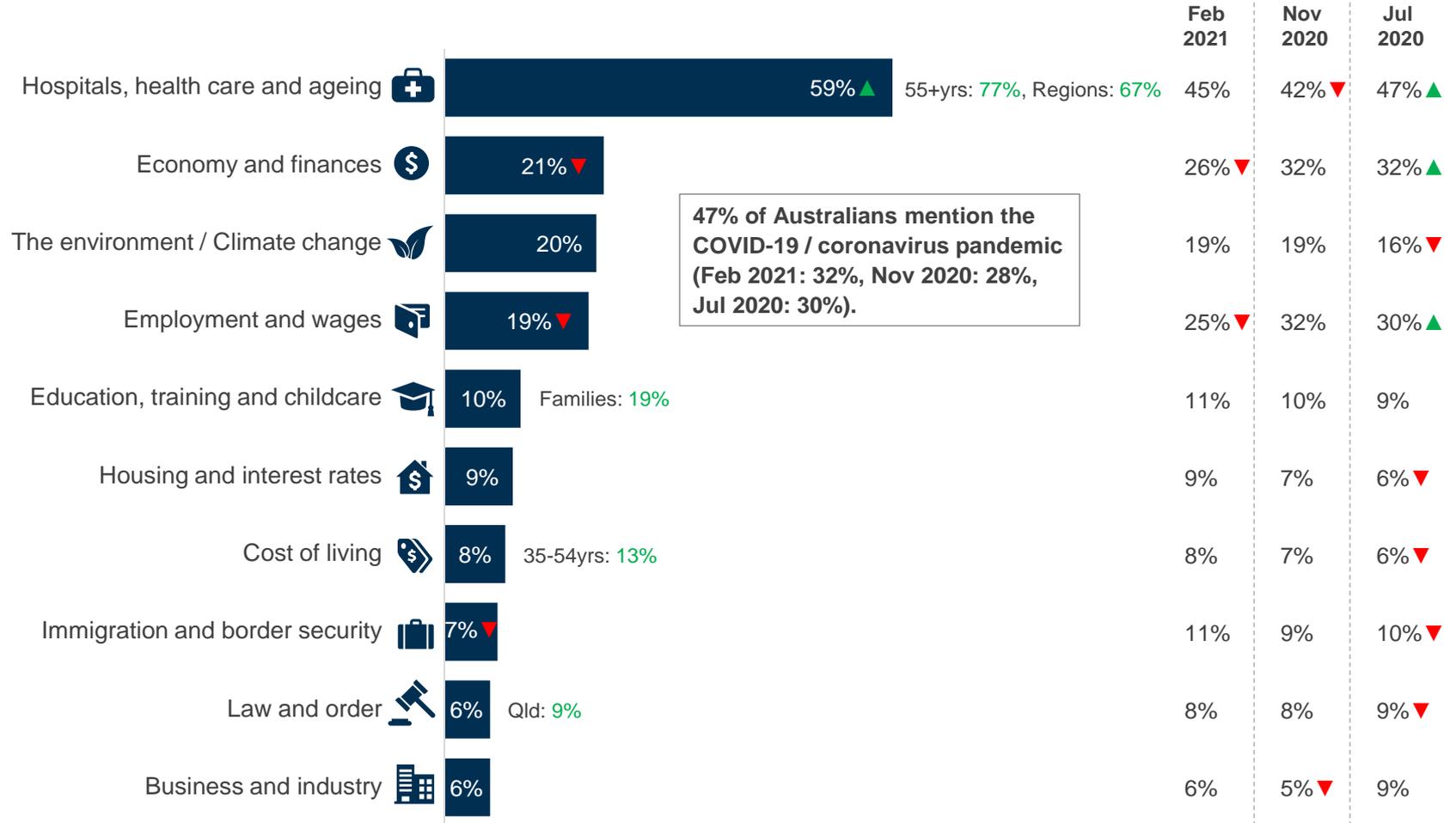
Top of mind concerns are dominated by the appropriateness and effectiveness of the public health response to COVID-19, such as lockdowns, quarantines and the vaccine rollout. Australians are also thinking about the need to support business and workers through the ongoing economic fallout of the pandemic, toward a future recovery and 'new normal'.



# Healthcare dominates top of mind concerns, followed by the economy, environment and employment



Most important issues the Australian Government should focus on  
(Up to three issues – unprompted\*)



\*Issues mentioned among fewer than 6% 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).



# Healthcare, the economy, jobs and the environment also lead prompted concerns, in addition to cost of living



Similarly, as more challenging COVID-19 variants gain a foothold in Australia, hospitals, healthcare and ageing (62%) also remains Australians' top prompted priority for attention from the Australian Government and a greater concern than it was in 2020 (55% in November 2020 and 56% in July 2020).

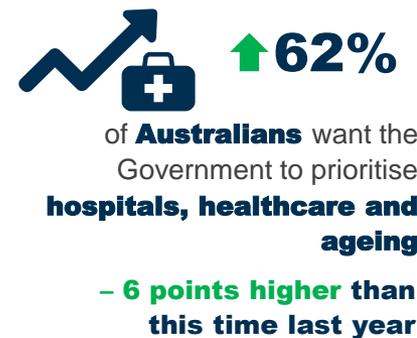
Healthcare is followed closely by cost of living (57%), with the economy and finances (47%), employment and wages (39%, down from 45%) and the environment and climate change (37%) completing a top five of community concerns which has remained unchanged for the past two years.

Other key public priorities are also steady, with education, training and childcare (27%), housing and interest rates (27%), provision of public services (25%), immigration and border security (25%) and defence, security and terrorism (20%) rounding out the top ten most important issues to Australians.

Generational differences persist. Younger adults aged 18 to 34 years, disproportionately affected by the economic impact of COVID-19, remain most concerned about cost of living (61%).

In contrast, hospitals, healthcare and ageing continues to dominate concerns among those aged 55 years and over (79%), amid the ongoing COVID-19 health emergency. The economy and finances (51%) remains their other leading concern.

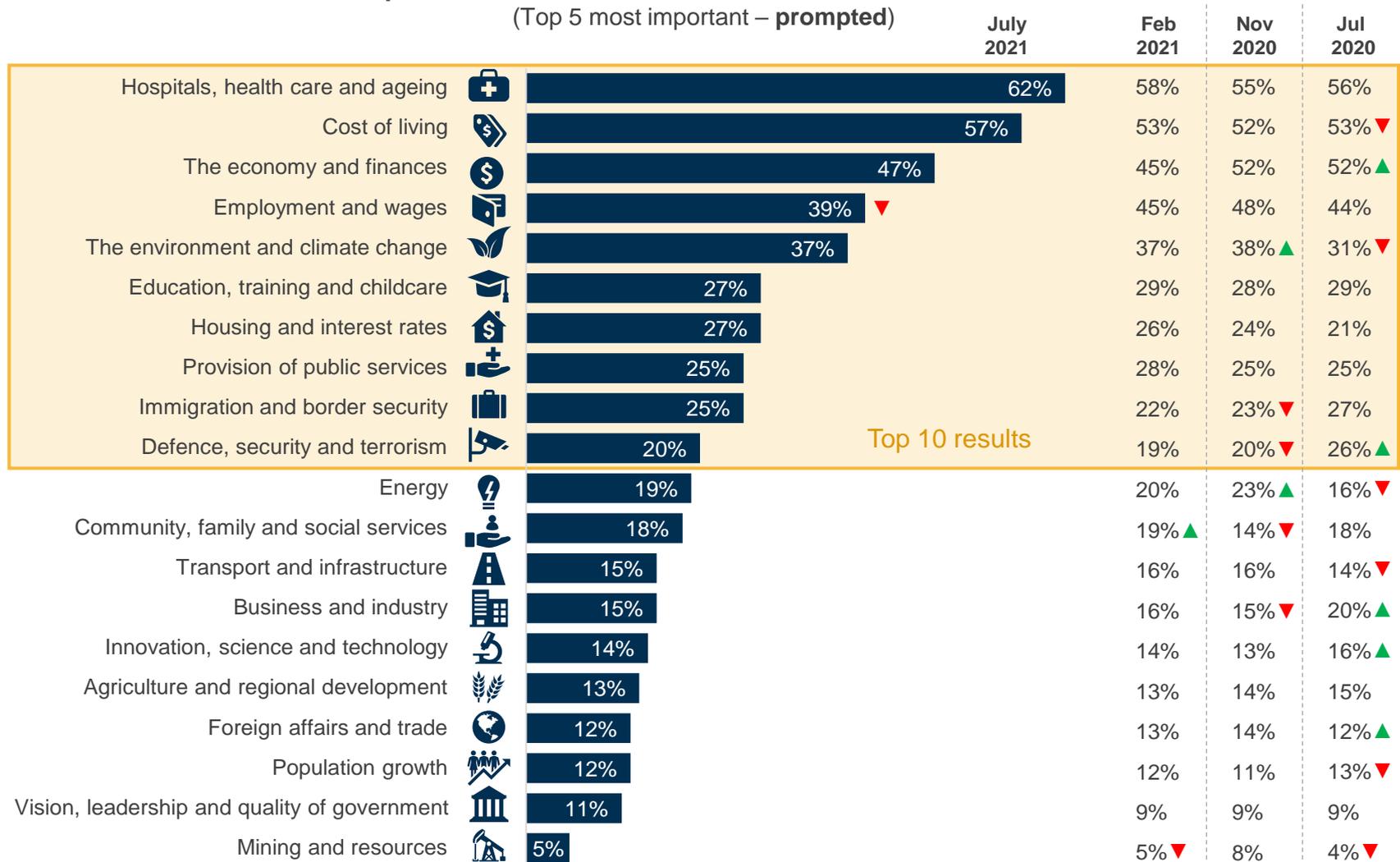
For those aged 35 to 54 years, greater focus on work, housing and caring commitments contributes to a majority wanting Government action on cost of living (64%) and hospitals, healthcare and ageing (61%). Further, with housing prices on the rise and the rental market at crisis point in some regions, this age group are now more concerned about housing and interest rates (35%) than even young adults.



# Healthcare and cost of living still 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.

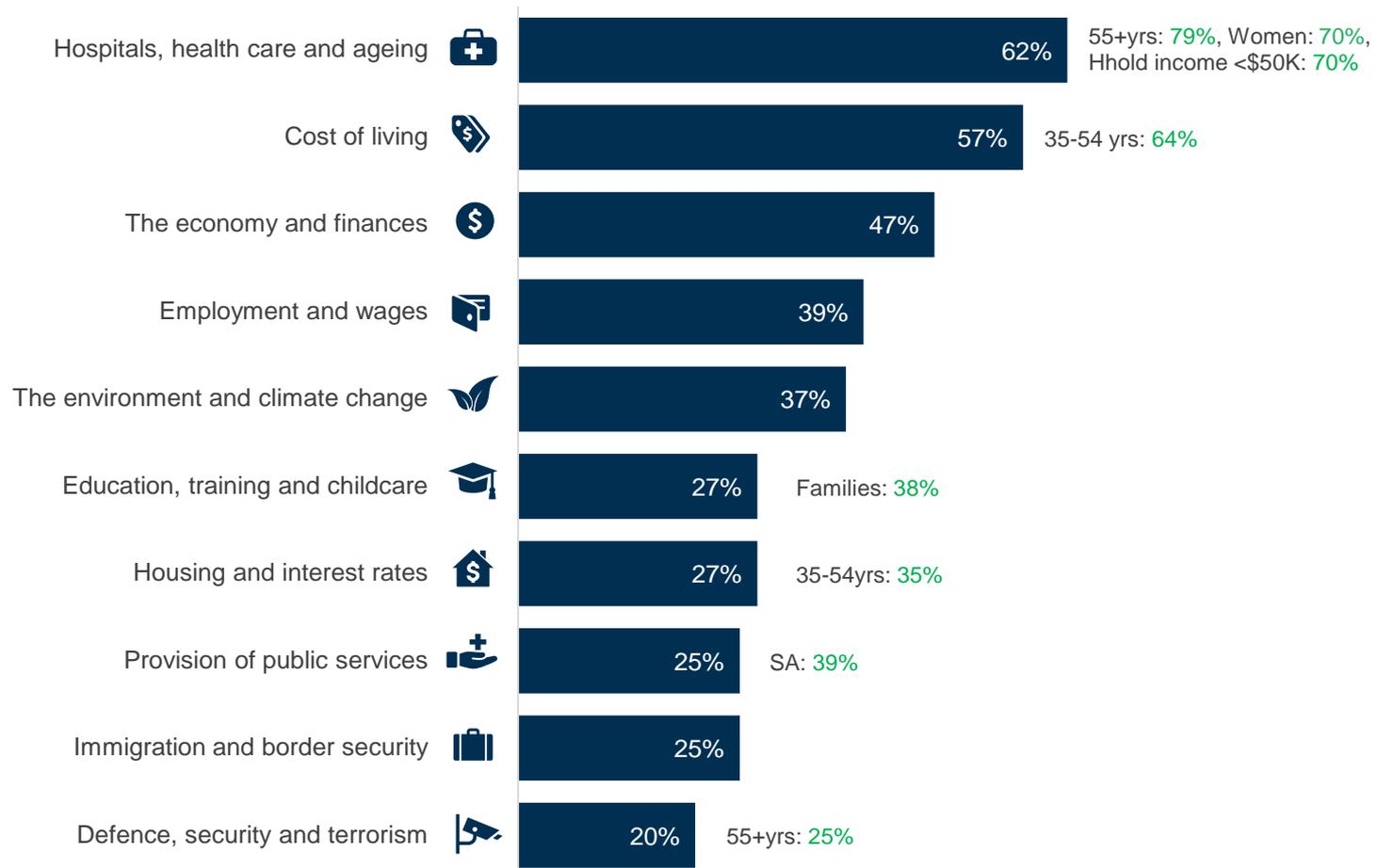
Q. From the following list, please select the five most important issues you think the Australian Government should focus on.

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

# Older adults remain most concerned about healthcare, while cost of living leads among those aged 35-54 years



## 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).



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

# On balance, people still see themselves, their community, business and our economies as heading in the right direction



More Australians continue to see key aspects of Australian life heading in the right direction than see it heading in the wrong direction. However, after an increase in general optimism in February, a second year of disruption due to the COVID-19 pandemic finds people now feeling slightly less positive about the future.

Australians remain most positive about their own personal situation, 39% feel they are heading in the right direction (compared to a slightly higher 43% in February). This is still more than double the 15% who feel they are heading in the wrong direction.

Similarly, people remain confident about their local community: 36% feel it is heading in the right direction, also more than twice those who feel it is heading in the wrong direction (14%).

While slightly more feel the national economy is heading in the right direction (30%) than in the wrong direction (26%), public confidence has fallen since the new year's lift seen in February (33% right direction, 23% wrong direction).

Similarly, while 30% of adults feel business and industry is heading in the right direction, more than those who see it heading in the wrong direction (18%), this is also slightly less optimistic than February (31% right direction, 17% wrong direction).

Confidence in state and territory economies remains stronger by comparison but has also edged off somewhat at a national level: 37% right direction (compared to a slightly higher 40% in February) and 21% wrong direction.

Least disrupted by COVID-19, a majority of WA residents (56%) continue to see their state economy as heading in the right direction.

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

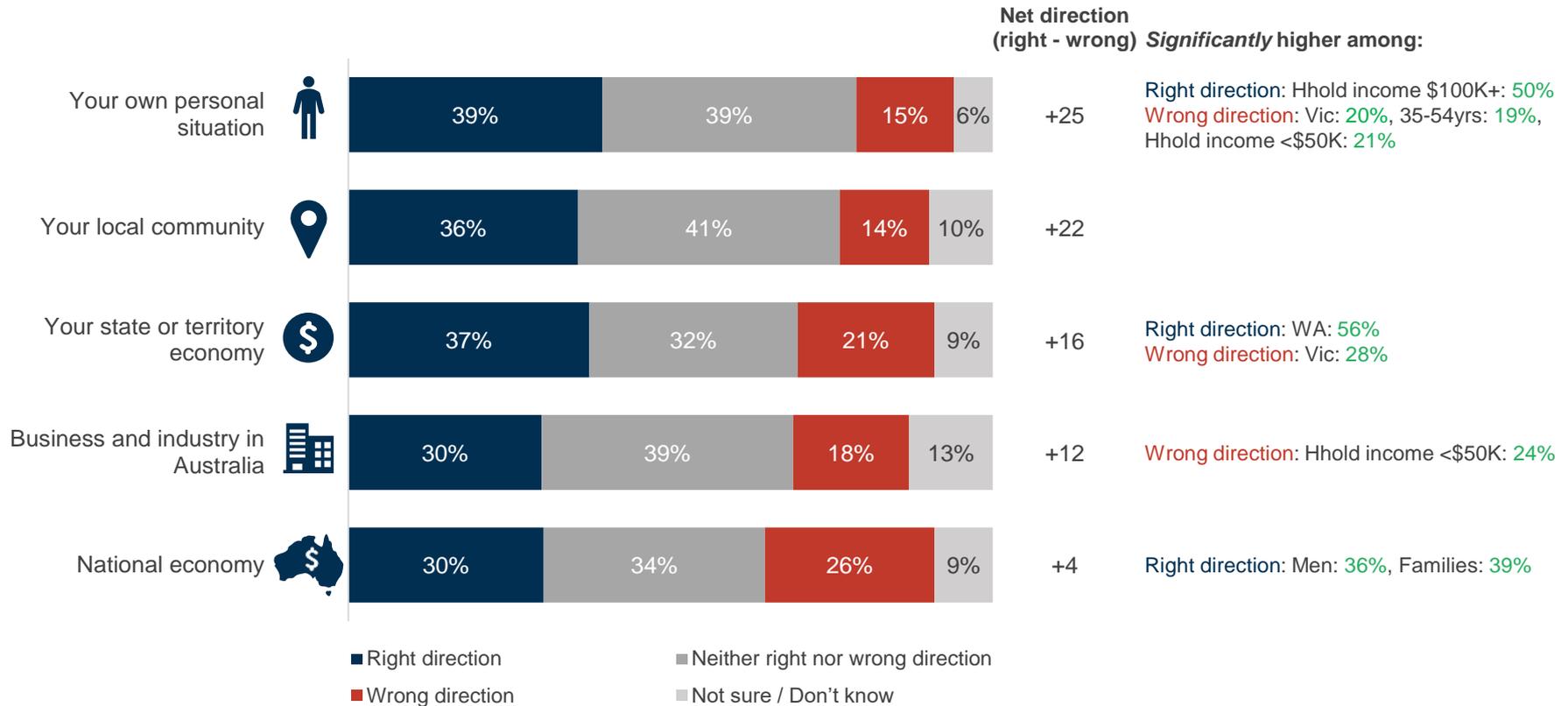
However, fresh from another lockdown at the time of this survey, opinion remains more mixed in Victoria: 32% see their economy heading in the right direction but almost as many (28%) see it heading in the wrong direction.

\* Fieldwork was conducted three weeks into the ongoing Sydney lockdown.

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



## Direction of organisations and groups in Australia

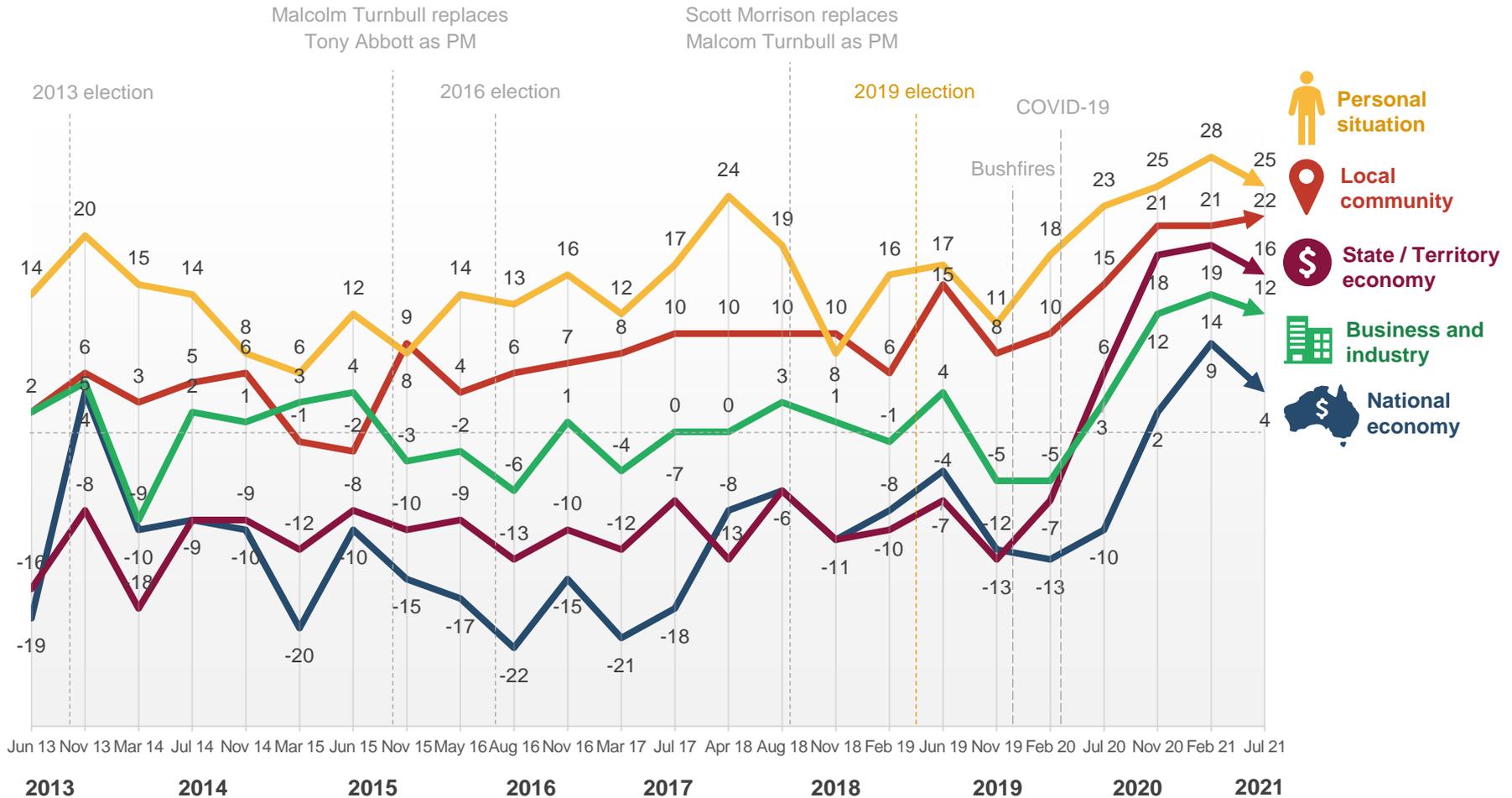


Significantly higher than the national total at the 95% confidence interval.  
 Q. Do you think each of the following is generally headed in the right or the wrong direction?  
 Base: All respondents (n=1,000).

# After peaking in February, optimism has softened for business, economies and personal circumstances



**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 continues to weaken on healthcare and leadership compared to 2020



Federal Government performance ratings across key areas are little changed since February and, for the most part, over the past 12 months. However, amid ongoing public debate and criticism of its COVID-19 response, the Government has seen its greatest declines over the past year on vision and leadership (index of 46, compared with 48 in February and 52 in July 2020) and the community's top priority of hospitals, healthcare and ageing (index of 48, compared with 50 in February and 53 in July 2020).

The Government also continues to perform less well on other leading community priorities such as cost of living (index of 42) and the related issue of housing and interest rates (index of 47), as well as the environment and climate change (index of 44) and employment and wages (index of 48). Energy also remains a poorer performing area (index of 48).

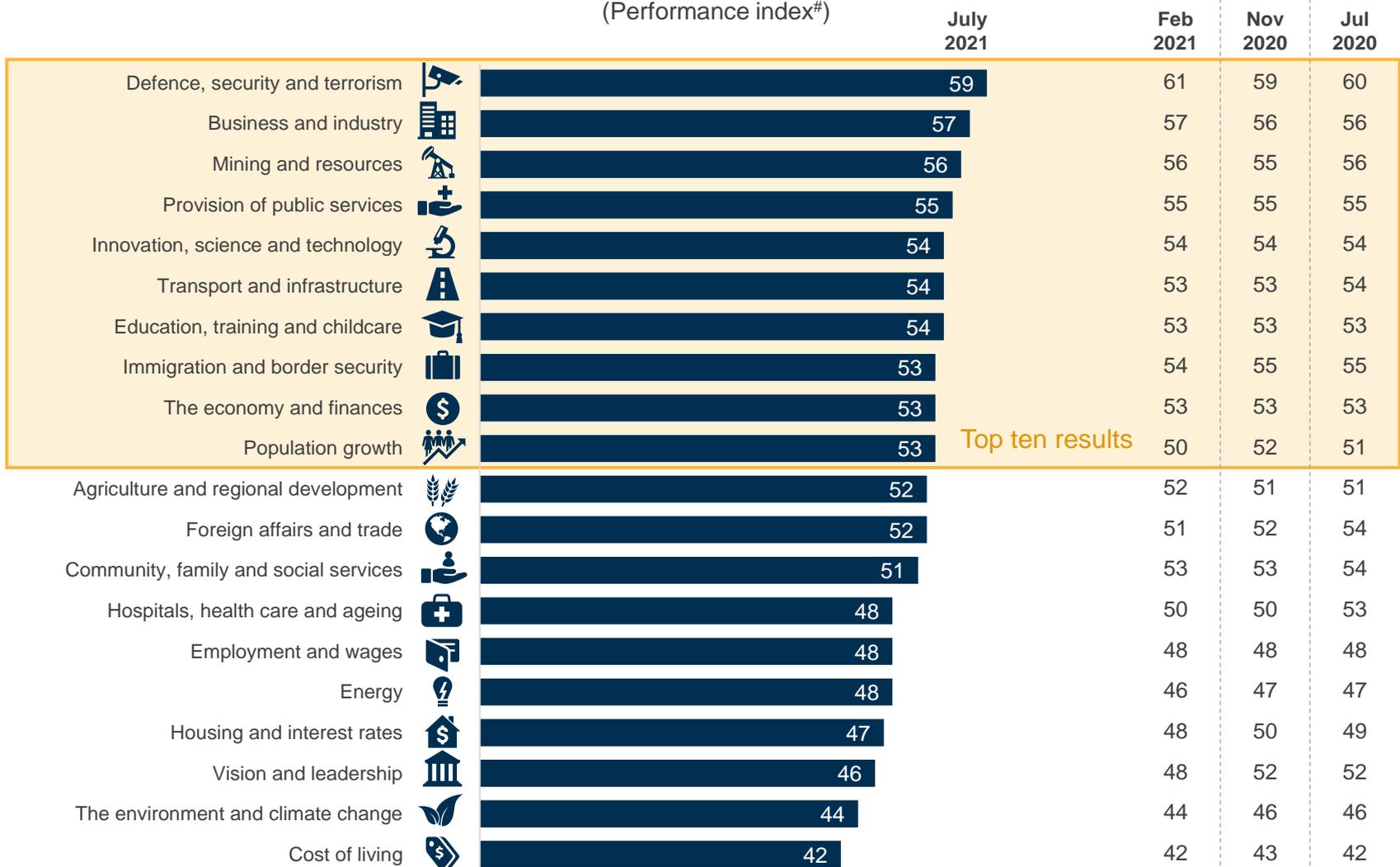
On a more positive note, the Morrison Government's best rated performance areas remain defence, security and terrorism (index of 59), business and industry (index of 57), mining and resources (index of 56) and provision of public services (index of 55). It also continues to perform reasonably well in areas such as innovation, science and technology, transport and infrastructure and education, training and childcare (index of 54 for each).



# Government performance on health care and leadership continue their downward trend from 2020



## Australian Government performance on issues (Performance index#)

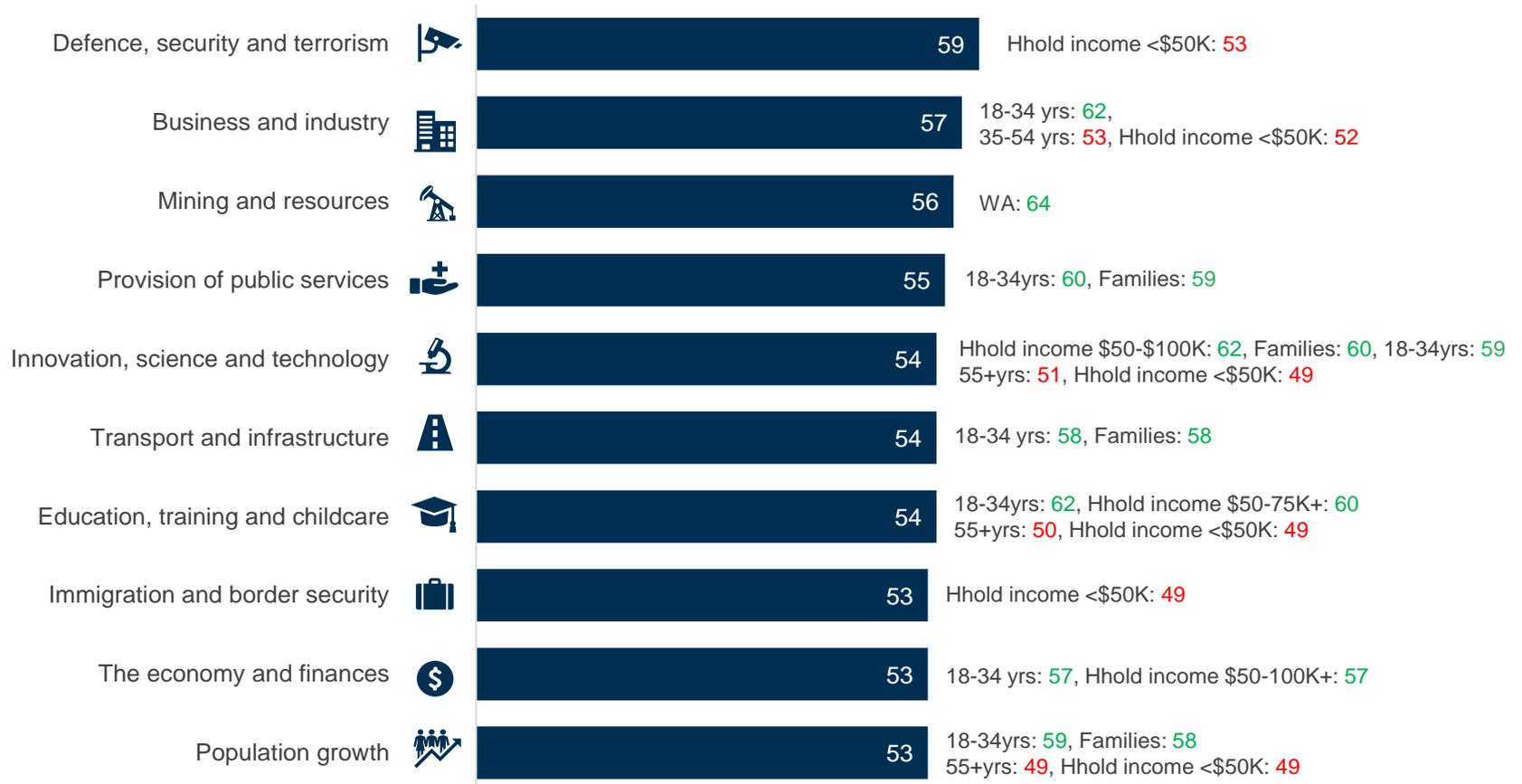


#For an explanation of how index scores are calculated refer to the survey methodology section of this report.  
Q. How would you rate the performance of the Australian Government on each of the following issues?  
Base: All respondents (approximately n=1,000 per wave).

# Younger adults rate Government performance more favourably across most key issues



## 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?**

# Government performance has declined further since its November peak but remains above pre-COVID-19 levels



Federal Government performance continues to rate above pre-COVID-19 levels but has fallen sharply since February (index of 52, down from 58). This continues a decline from this Government's series high result in July 2020 (index of 63).

The number of Australians who rate this Government's performance as 'very good' or 'good' has declined from 49% in February to 41% in July. This represents a 17-point decline from 12 months ago (58% in July 2020) but remains substantially higher than the final pre-COVID measure in February 2020 (28%).

While the number of Australians who rate the Morrison Government's performance as 'very poor' or 'poor' continues to increase (27%, up from 18% in February and 14% in November), this is still well below pre-COVID-19 levels (34% in February 2020). 'Average' ratings (30%) have remained stable over 2021.

State and Territory Governments continue to attract more positive performance ratings (index of 60) however this sentiment has gradually softened since 2020, down two index points from November (index of 64) to February (index of 62) and again to July 2021. Also outperforming the Federal Government and little changed over the past year are business and industry (index of 57) and local Councils (index of 54).

Continuing a trend seen over the past 12 months, the WA State Government significantly outperforms other states with a performance index score of 72.

The rated performance of State Governments in NSW\* and SA (index of 60 for each) remains in line with the national average however sentiment in Queensland has turned since February, falling six index points to 54 in July 2021.

Despite further community lockdowns in 2021, the Victorian Government has recovered some ground in July 2021 (index of 57), after falling back below other states in February (index of 55, down from 60 in November).



Index of  
**52**

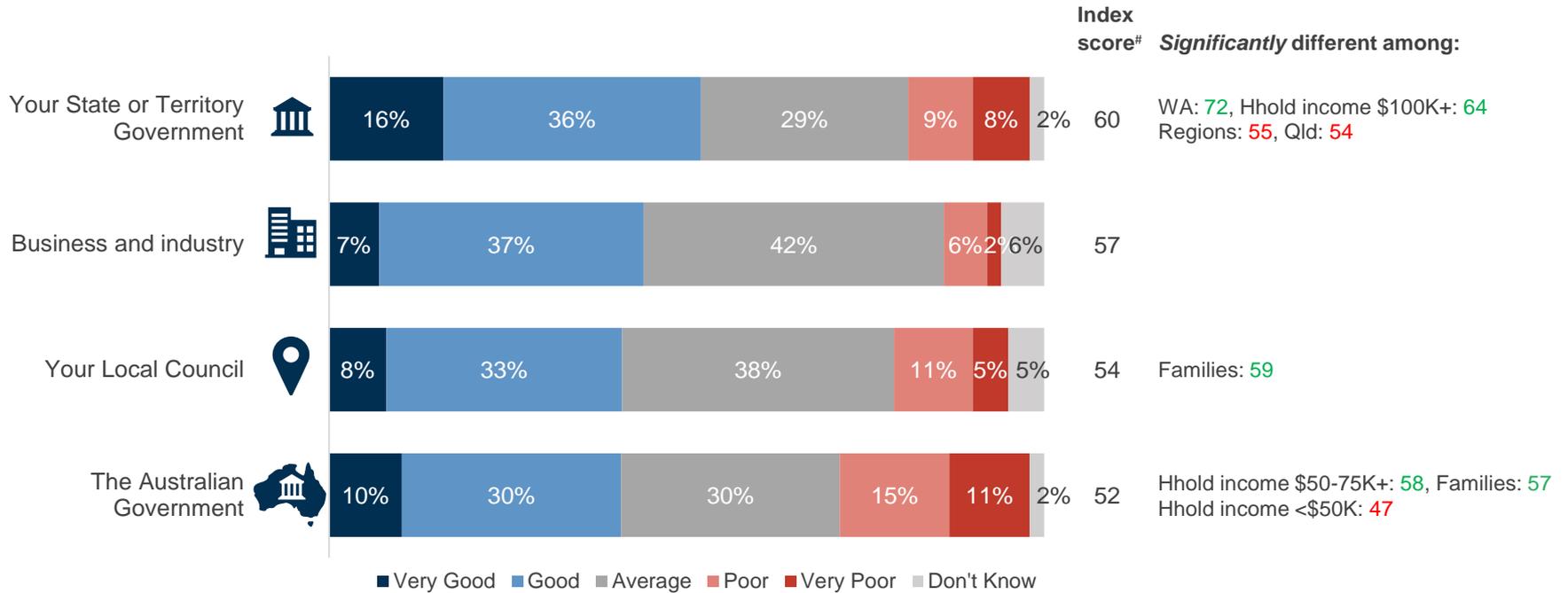
Ratings of the **performance** of the **Australian Government** continue to decline – **11 points lower** than in July 2021.

\* Fieldwork was conducted three weeks into the ongoing Sydney 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.

<sup>#</sup>For an explanation of how index scores are calculated refer to the research methodology section of this report.

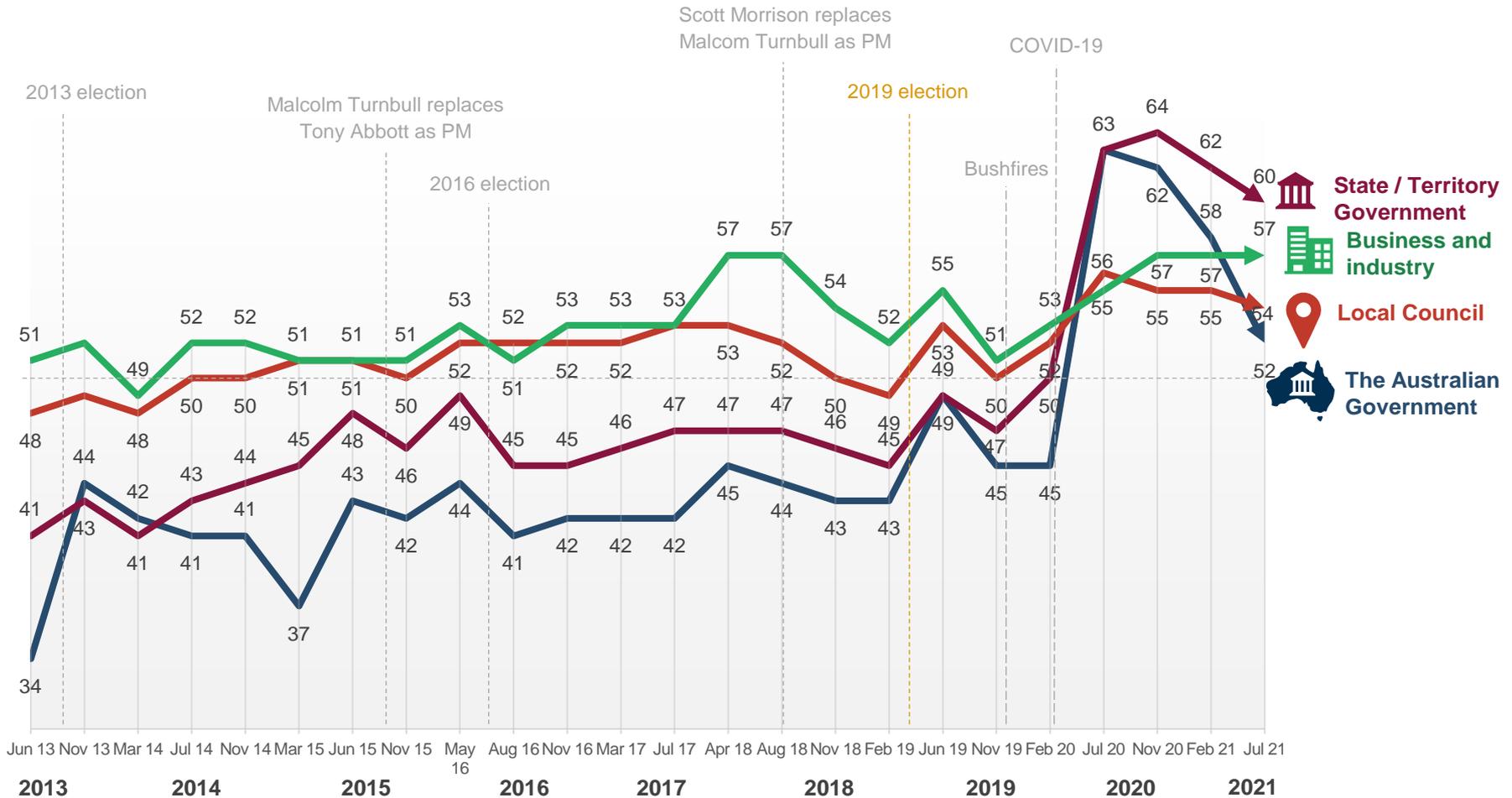
Q. How would you rate the current performance of each of the following organisations or groups in Australia?

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

# Federal Government performance has declined further since February but remains 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).

# What are Australians' COVID-19 concerns?



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



In July 2021, most Australians remain concerned about the COVID-19 pandemic (85%, up from 81%) and their level of concern is increasing. Half (50%) of adults are now extremely or very concerned about COVID-19, up from 41% in February.

Concern across most mainland states is in line with national opinion, however Queenslanders remain a little more relaxed (78% concerned), despite the periodic outbreaks across their state.

Similarly, most Australians (82%) remain concerned about the national economic impact of the pandemic with half (50%) of adults extremely or very concerned.

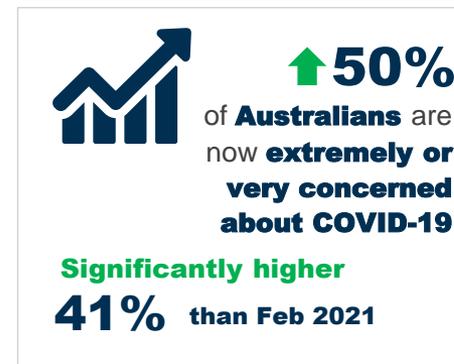
Other key concerns about the COVID-19 pandemic are:

- the ability of the health system to cope (78%, up from 70%)
- borders being open to states with a COVID-19 outbreak (75%, up from 71%)
- another lockdown due to another wave (74%, up from 68%)
- the vaccine rollout (74%)
- not being able to visit family and friends (73%, up from 68%).

With many in NSW being three weeks into the state's latest lockdown at the time of this survey, more NSW residents are extremely or very concerned about getting COVID-19 themselves or their family or friends getting it, relative to other states.

Similarly, having already experienced multiple short lockdowns in 2021 as a result of cases brought in from interstate, more Victorians are extremely or very concerned about borders being open to states where there is a COVID-19 outbreak and the possibility of facing another lockdown.

Younger adults continue to feel the impacts of COVID-19 more acutely than older groups. Concern about the health and financial impacts COVID-19, as well as not being able to travel, is significantly stronger among 18 to 34 year olds.



# People feel less positive about Australia's COVID-19 response as they push through a second year of disruption



In July 2021, Australians are most positive about their own personal response to COVID-19 and the health and medical sector response; 68% and 65% respectively rate these as very good or good.

However, the rating of 57% for Australia's response in comparison to the rest of the world represents a sharp 22-point drop in ratings since February (79%).

Similarly, amid public debate around issues such as non-compliance with restrictions, slow vaccine take-up and fringe views that deny the pandemic or are anti-vaccination, fewer adults now feel positive about the response of Australians generally (42% very good or good, down from 59%).

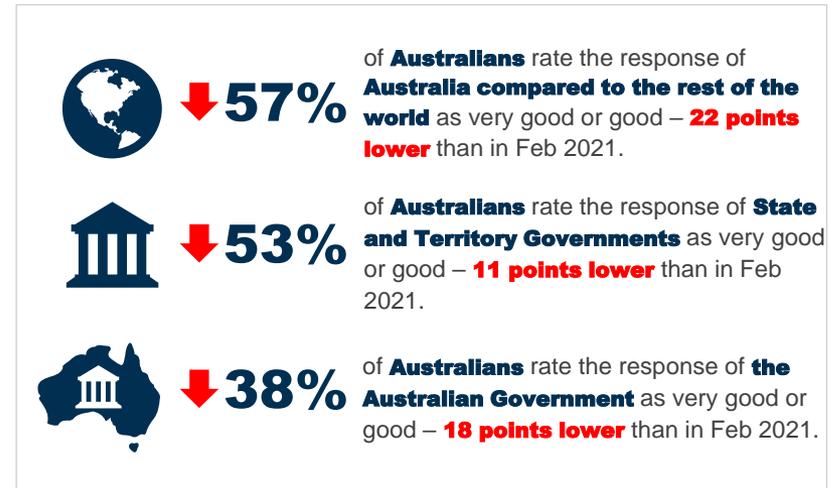
The response of State and Territory Governments is also viewed less favourably (53% very good or good, down from 64%) but they continue to outperform their national counterparts.

Ratings of the Australian Government response has fallen 18 points since February to a series low of 38% (down from 56%). This compares with twelve months ago, when around two-thirds (66%) of Australians thought the Australian Government's response to COVID-19 was very good or good.

Across the mainland states, WA and SA remain most positive about their State Government's performance: 78% and 62% of residents, respectively, rate this as very good or good.

Sentiment in the other mainland states is similar to the national average with more than twice as many rating their State Government's performance as very good or good, than as very poor or poor.

Ratings of business and industry and local council responses to COVID-19 are also less positive than in February at 40% and 37% very good or good, respectively (down from 50% and 45%).



## Willingness to be vaccinated is high across all age groups as it remains ‘the right thing to do’



In July 2021, amid limited vaccine eligibility and supply, seven in ten (73%) of Australians claim to be at least partially vaccinated (28%) or planning to have a vaccine when it becomes available to them (45%, including 32% who definitely plan to). This suggests public sentiment is on track to meet the 70% vaccination rate set by national cabinet for leaving lockdowns largely behind but falls short of the 80% vaccination rate required for relaxing border restrictions and other measures.

The balance of opinion is evenly split among those still undecided (4%) or needing more information (10%) and those who do not plan to have a vaccine (14%, including 8% who definitely do not plan to).

Positively, while Australians’ willingness to be vaccinated remains highest among older age groups, it is now at a strong majority across all age cohorts.

A few months into the nation’s vaccination program, and amid an opening up of eligibility due to increased Delta outbreaks, those already vaccinated or planning to have a vaccine number 81% among adults aged 55 and over, 71% of 35 to 54 year olds and 65% of 18 to 34 year olds.

A sense of moral obligation remains strong with 70% of Australians agreeing that getting vaccinated is ‘the right thing to do’. People continue to believe that the vaccines will make us safer (67%) and help us get back to a new ‘normal’ (65%), stopping us from getting and spreading COVID-19 (51%) or becoming as sick if we do (61%, up from 56%).

There is high agreement that vaccination should be compulsory for workers in certain industries such as health and aged care (72%) and, more broadly, that businesses should be able to require staff to be vaccinated (56%, including 55% among workers). Australians are less concerned people may be unfairly pressured to get vaccinated (38% agree).

However, despite widespread recognition of the vaccines’ potential benefits, many Australians are concerned about their safety and side effects (53%, down from 58%) and efficacy against new variants (61%).

## Mixed views on vaccination incentives but some support for more freedoms for those who do get vaccinated



There are mixed views about offering incentives to encourage vaccination: 47% agree (a higher 54% in NSW), 27% disagree and 23% are neutral. However, a majority (55%) of Australians agree those who are fully vaccinated should have more freedom from restrictions than those who are not. While this view is strongest among those who have already been vaccinated (65%) or intend to be (64%), a third (33%) of those who do not intend to have the vaccine still believe those who do should be afforded more freedoms.

Travel-related privileges are most favoured for people who are fully vaccinated, such as home quarantine after overseas trips (32%, a higher 44% in WA), regional or interstate travel when borders are closed (27%) or overseas travel to any country for any reason (25%). Around one in four adults (26%) also believe vaccinated people should be allowed to attend indoor activities and entertainment such as gyms, theatres, concerts, restaurants or bars during staged restrictions.

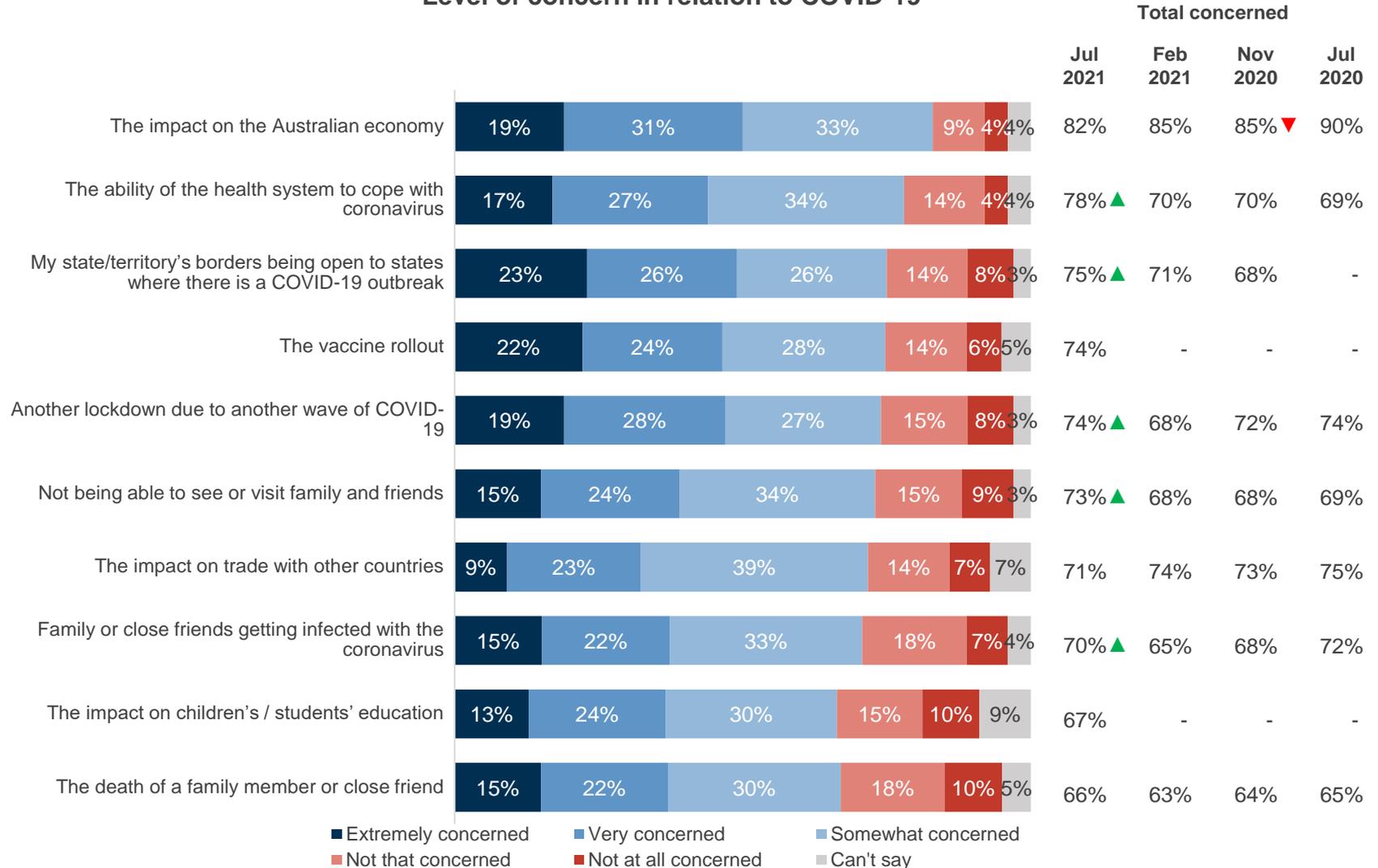
There is also limited support for other potential privileges during staged restrictions, such as undertaking non-essential activities (23%), attending major public events such as football matches or concerts (21%), going mask-free (18%) and not having to follow curfews or restrictions on gatherings (20%) or self-isolate after contact with a COVID-19 case (19%).



# Australians now more concerned about the health system, risk of infection and outbreaks, and further lockdowns

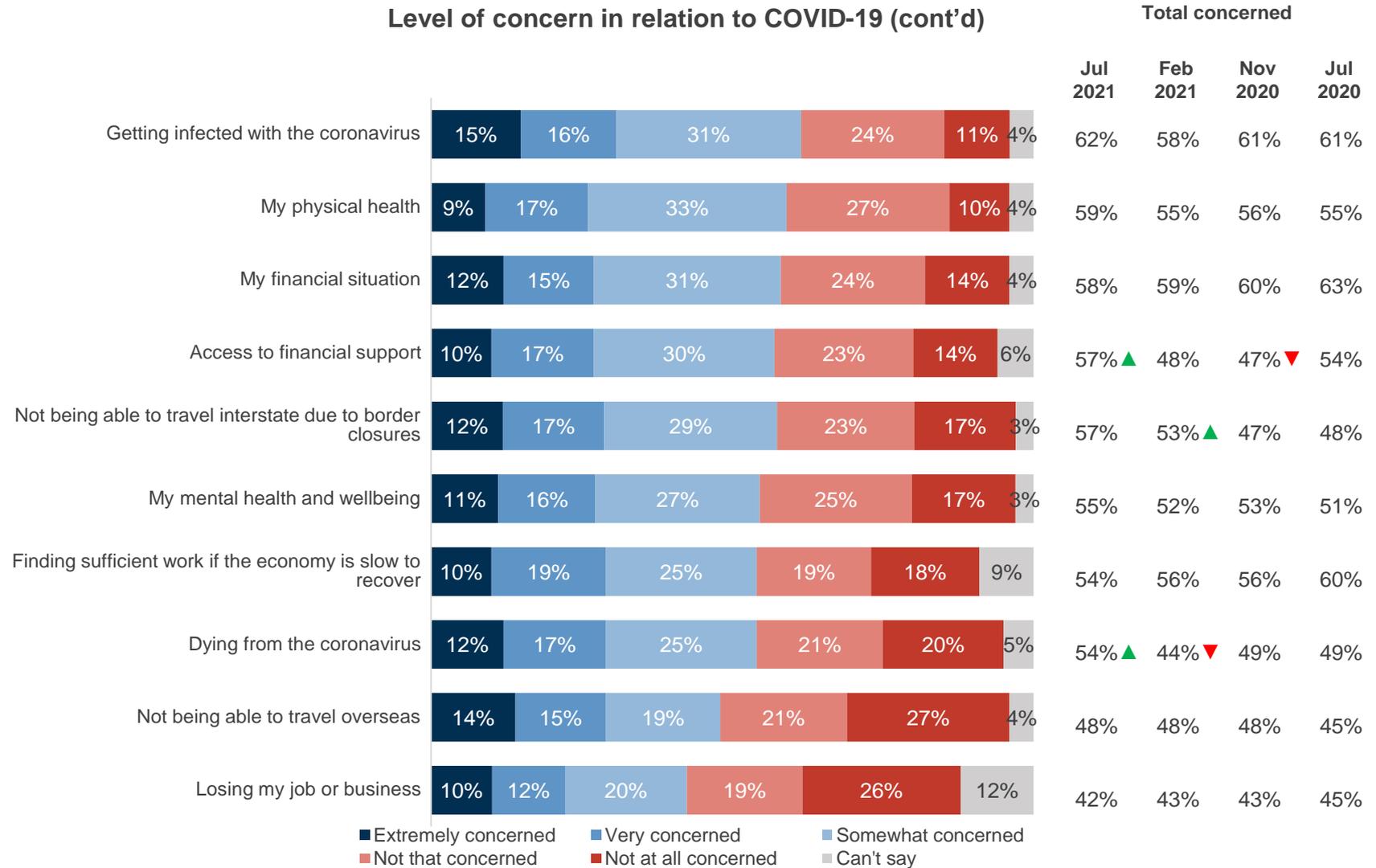


## Level of concern in relation to COVID-19



Significantly ▲ higher or ▼ 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=1,000).

# Financial support and fatalities now greater concerns in relation to COVID-19

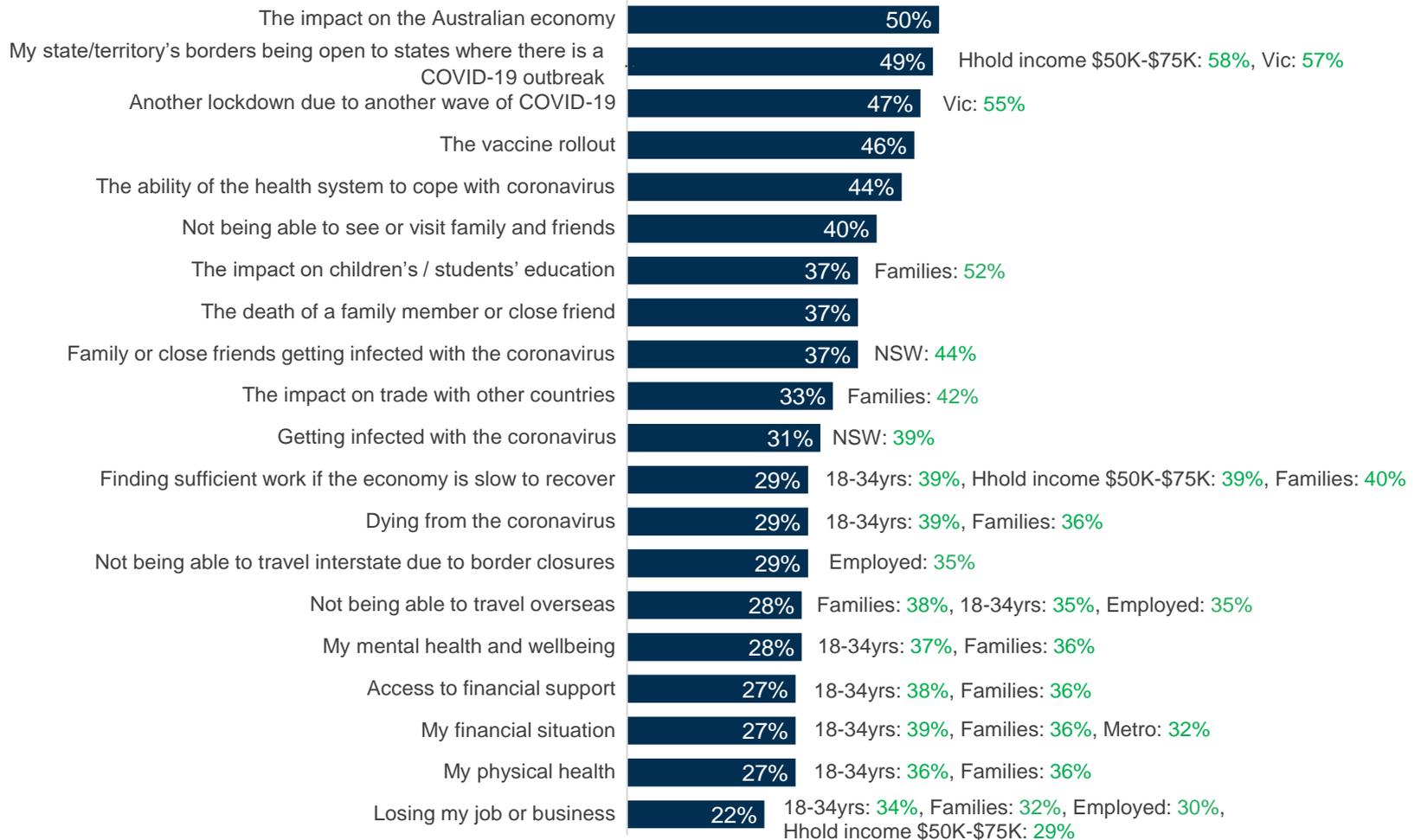


Significantly ▲ higher or ▼ lower than previous True Issues wave at the 95% confidence interval.  
 Q. Please rate your level of concern with each of the following considerations in relation to the COVID-19 coronavirus.  
 Base: All respondents (n=1,000).

# COVID-19 infection is a stronger concern in NSW, while Victorians worry about their open borders and lockdowns



## Level of concern in relation to COVID-19 (Total 'extremely' + 'very' concerned)

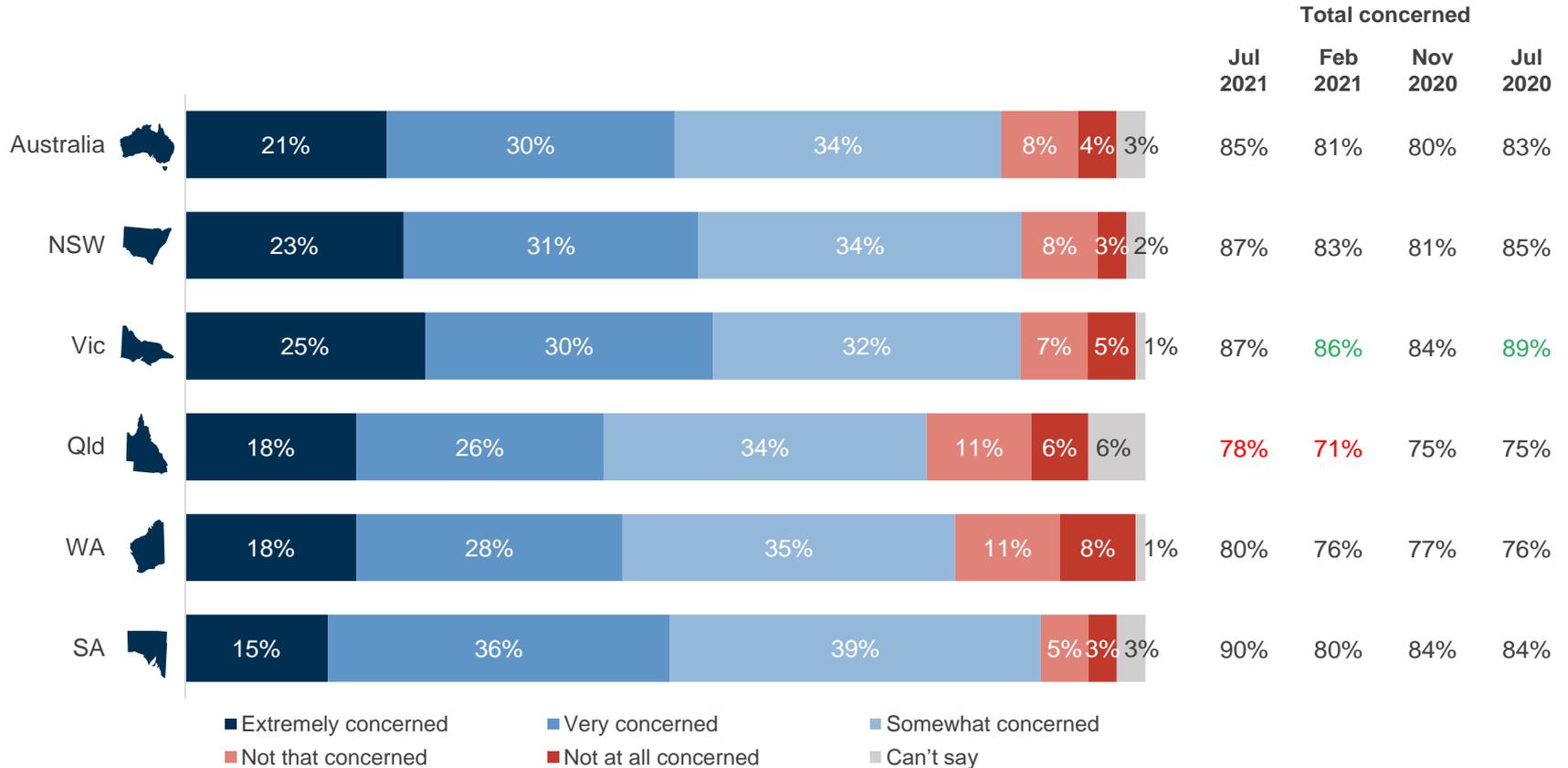


Significantly higher than the national total at the 95% confidence interval.  
 Q. Please rate your level of concern with each of the following considerations in relation to the COVID-19 coronavirus.  
 Base: All respondents (n=1,000).

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



## Overall concern about the COVID-19 pandemic

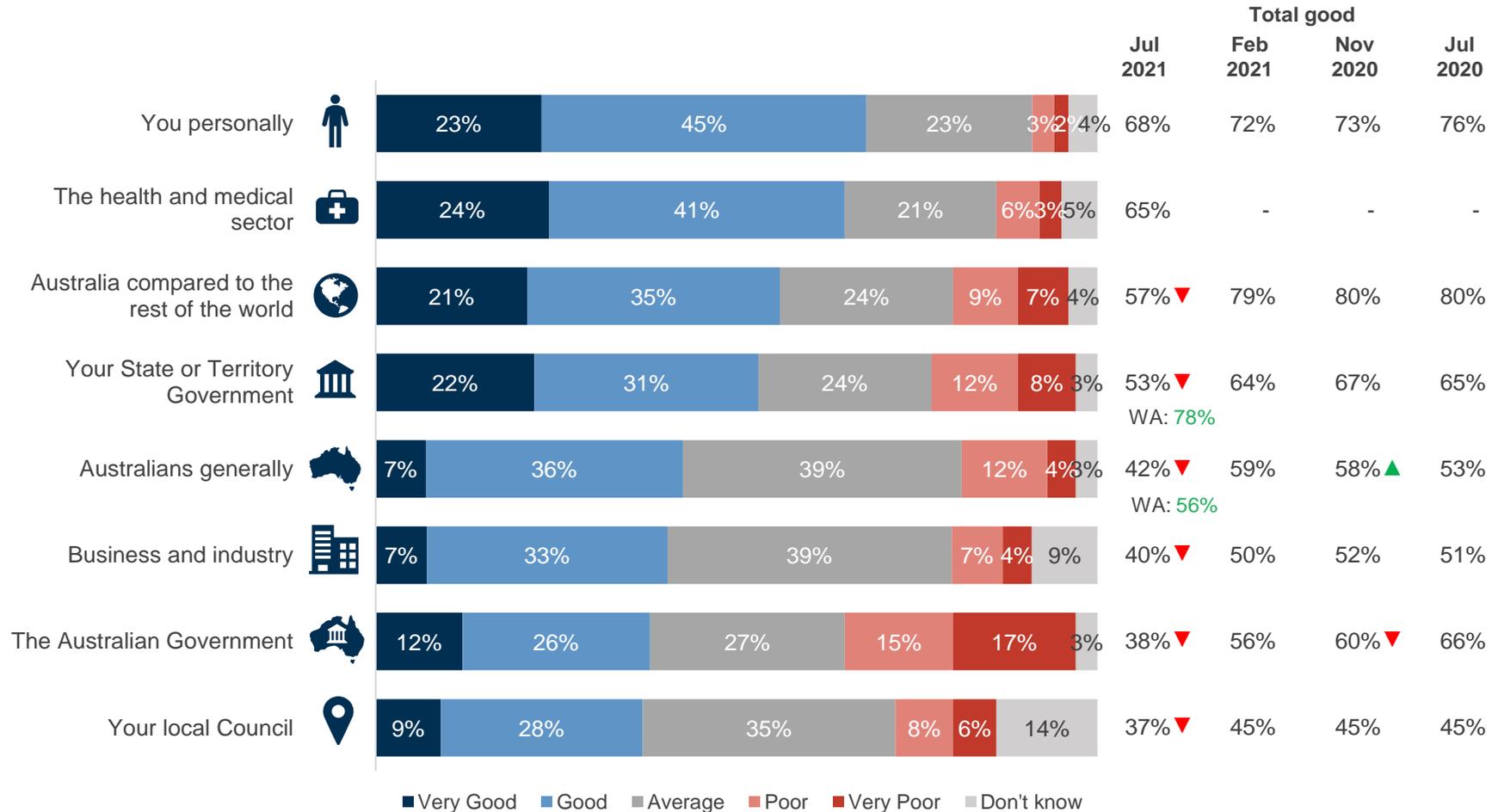


Significantly higher / lower than the national total at the 95% confidence interval.  
 Q. And how concerned are you overall about the COVID-19 coronavirus pandemic?  
 Base: All respondents (n=1,000).

# Australians now less impressed with the Australian response compared to February

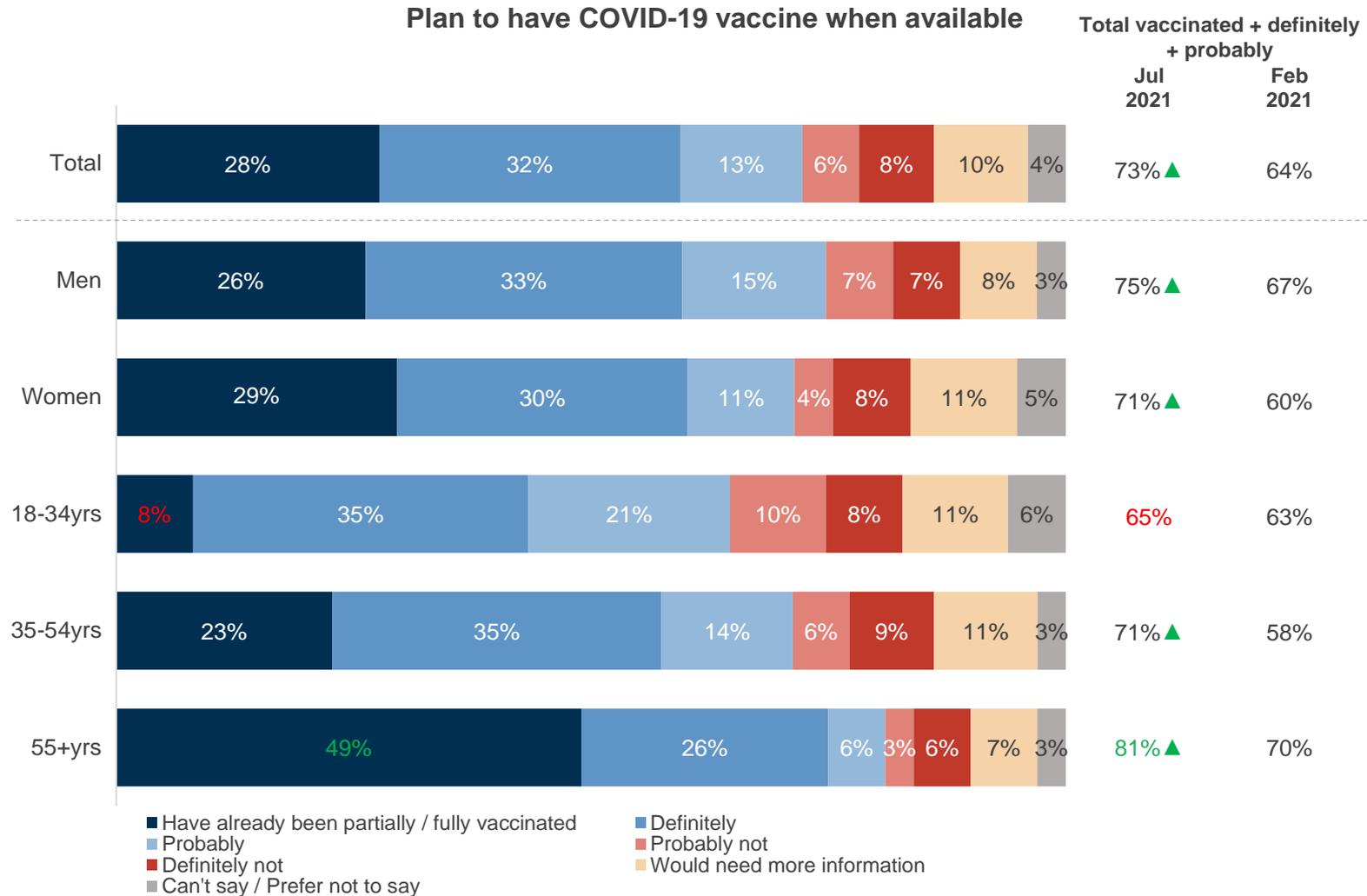


## Performance of organisations, groups and individuals in responding to COVID-19



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=1,000).

# Seven in ten Australians are partially or fully vaccinated or plan to get vaccinated

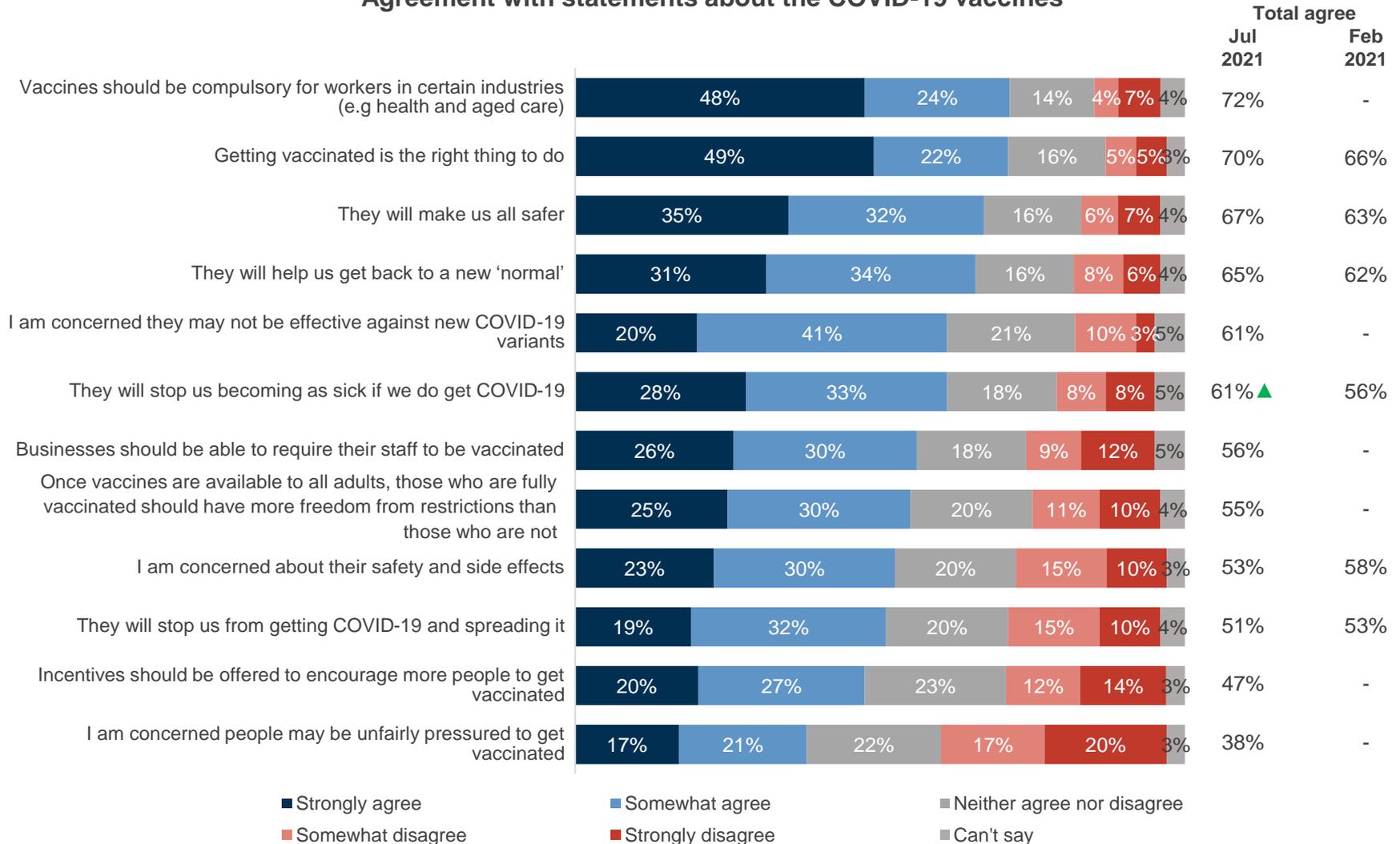


Significantly ▲ higher than previous True Issues wave at the 95% confidence interval.  
 Significantly higher or lower than the national total at the 95% confidence interval.  
 Q. Do you plan to have a COVID-19 vaccine when it becomes available to you?  
 Base: All respondents (n=1,000).

# Australians think getting vaccinated is the right thing to do and should be compulsory for certain types of workers



## Agreement with statements about the COVID-19 vaccines

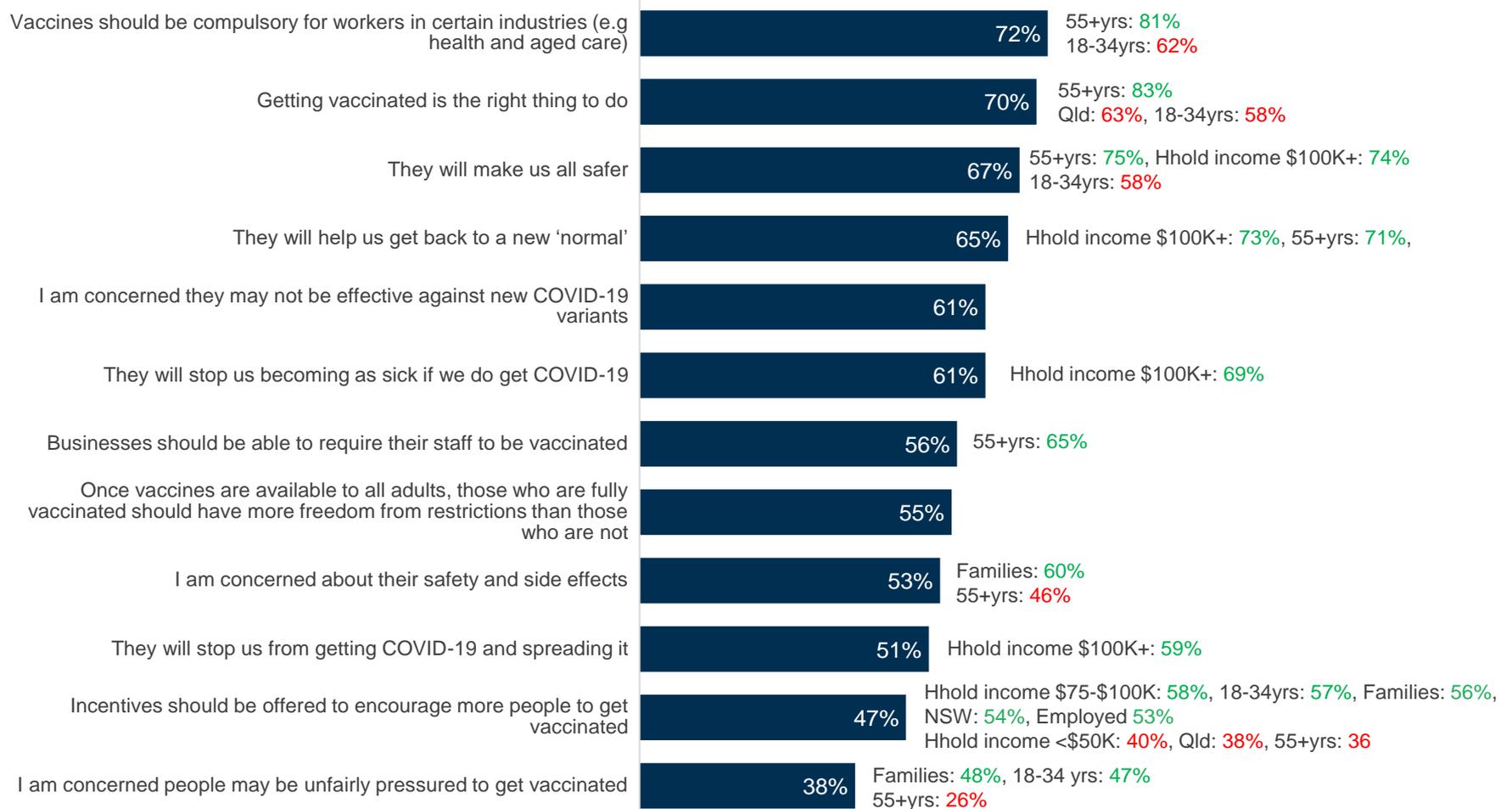


Significantly ▲ higher than previous True Issues wave at the 95% confidence interval.  
 Q. Do you agree or disagree with the following statements about the COVID-19 vaccines?  
 Base: All respondents (n=1,000).

# Amid its latest COVID-19 outbreak, a majority in NSW favour the use of incentives to encourage vaccination



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

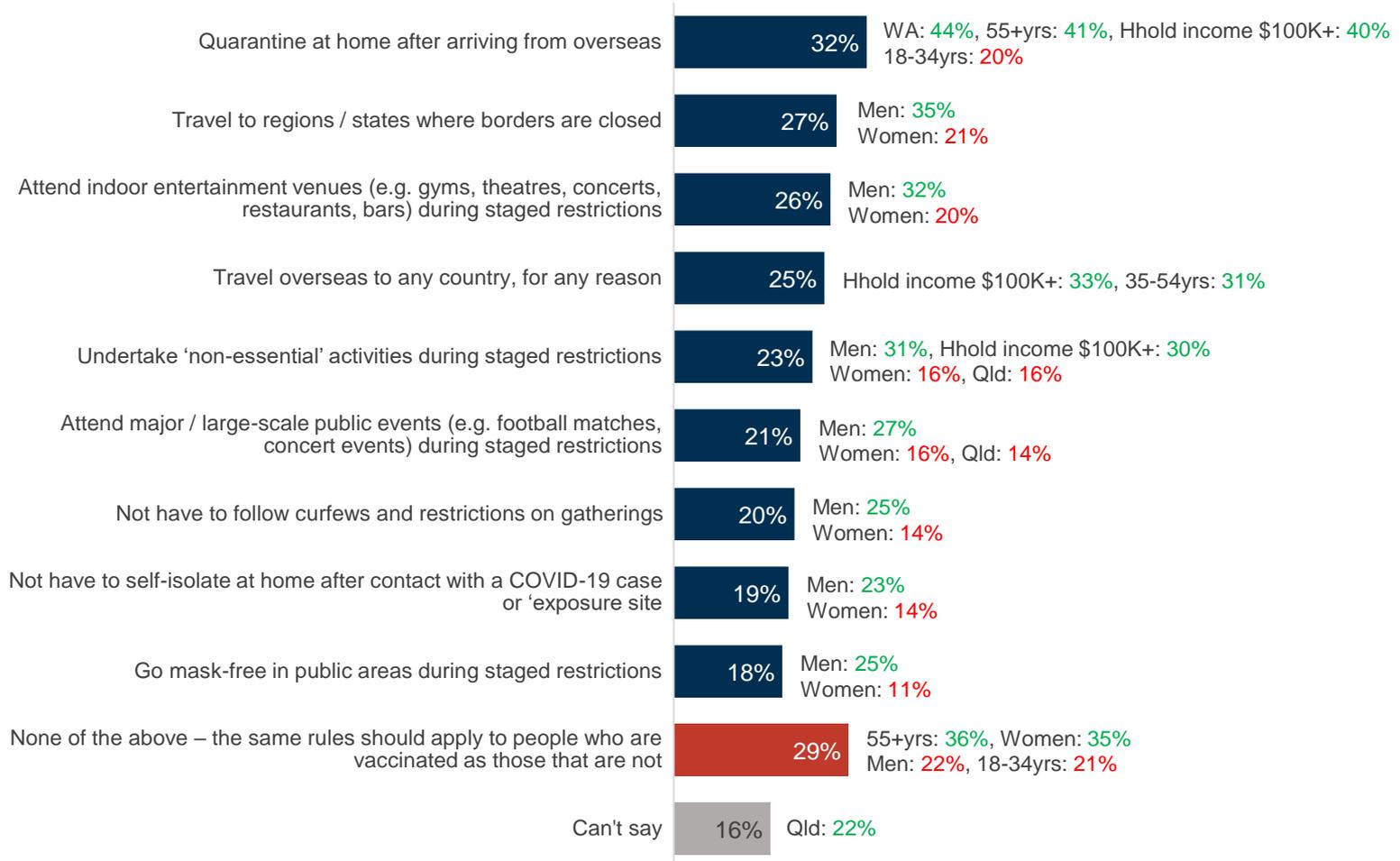


Significantly higher / lower than the national total at the 95% confidence interval.  
 Q. Do you agree or disagree with the following statements about the COVID-19 vaccines?  
 Base: All respondents (n=1,000).

# Women more cautious of freedoms for fully vaccinated, WA most supportive of home quarantine for overseas returnees



## What people who are fully vaccinated should be allowed to do (Multiple response)



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

Q. Which of the following should people who are fully vaccinated be allowed to do? Please select all that apply

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

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

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



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*Issued: 13<sup>th</sup> August 2021*



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