THERE ARE OVER 25 MILLION PEOPLE IN AUSTRALIA...

FIND OUT WHAT THEY'RE THINKING.

TRUE ISSUES®

NOVEMBER 2021

Contents

Survey methodology

National Online Survey

n=1,000 Australian adults

- Conducted Monday 22nd – Wednesday 24th November 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)
Very good	5%	100	5
Good	17%	75	13
Average	40%	50	20
Poor	19%	25	5
Very poor	15%	0	0
Don't know	4%	-	-
Index score			**43**

The research was conducted in compliance with AS-ISO 20252.

What are the issues Australians care about?

Health leads Australians' top of mind concerns, followed by the environment, economy and jobs

At the end of another year living with COVID-19, heading into the summer break and a federal election campaign, health continues to lead **top of mind** concerns for Australians, followed by the environment and the economy.

When asked to name up to three issues that personally interest or concern them the most, that the Australian Government should focus on, more than a third of Australians (37%) describe issues related to hospitals, healthcare and ageing.

While still the leading issue overall, health is a less dominant concern than in July (59%), when Australians were experiencing winter COVID-19 lockdowns, the vaccine rollout and local outbreaks of the Delta strain.

Similarly, after a significant spike in July, fewer adults now raise the COVID-19 pandemic, specifically, as a top three issue or concern (25%, down from 47%)*.

Following the recent COP26 UN climate change conference in Glasgow, the environment and climate change (26%, up from 20%) has overtaken the economy and finances (22%) and employment and wages (15%, down from 19%) to become the second most important individual issue to Australians.

* This survey was conducted prior to widespread media coverage and local detection of the Omicron variant.

Concerns about the employment and wages have become less top of mind over 2021, after being mentioned by almost a third of Australians 12 months ago. However, these remain important community priorities heading into the upcoming election.

That said, total mentions of key economic issues – the economy and finances, employment and wages, and cost of living – are at 38%, similar to the leading individual issue of hospitals, healthcare and ageing.

It is also worth noting that mentions of cost of living have increased significantly since July, up 3 points to 11%.

Health leads top of mind concerns, followed by the environment and economic issues

Most important issues the Australian Government should focus on

(Up to three issues – **unprompted***)

			Jul 2021	Feb 2021	Nov 2020
Hospitals, healthcare and ageing	37%▼	SA: 49%, 55+yrs: 48%, Women: 44%	59%▲	45%	42%▼
The environment / Climate change	26%▲	Hhold income $100K+: 33%	20%	19%	19%
Economy and finances	22%	Hhold income $100K+: 31%	21%▼	26%▼	32%
Employment and wages	15%▼		19%▼	25%▼	32%
Cost of living	11%▲		8%	8%	7%
Housing and interest rates	10%		9%	9%	7%
Education, training and childcare	9%	Families: 14%	10%	11%	10%
Immigration and border security	8%		7%▼	11%	9%
Law and order	8%	Qld: 14%	6%	8%	8%
Vision and leadership	7%▲	55+yrs: 12%	3%	3%	2%▼
Provision of public services	7%▲	55+yrs: 12%, Hhold income up to $50K: 11%, Regions: 10%	4%▼	7%	7%

TOTAL economy and finances + employment and wages + cost of living: 38%

25% of Australians mention the COVID-19 / coronavirus pandemic (Jul 2021: 47%, Feb 2021: 32%, Nov 2020: 28%).

**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).

Cost of living and health lead prompted concerns, followed by the environment, economy and jobs

After a second year of disruption to daily life due to COVID-19 but with current outbreaks seemingly under control, cost of living (59%) has slightly edged out hospitals, healthcare and ageing (58%) as Australians' top **prompted** priority for Federal Government attention.

While always a key concern, calls for action on living costs have been gradually building over the past 12 months (up seven points from November 2020). In contrast, concern about health has fallen back to previous levels from its winter peak (62% in July).

Heading into summer, increased community concern about the environment and climate change (41%, up from 37%) brings it in line with the economy and finances (41%, down from 47%), which is now well below its COVID-19 peak (52% in July and November 2020) and closer to pre-pandemic levels.

Employment and wages (38%) continues to round out the top five most important (prompted) issues to Australians.

Other key public priorities continue to include housing and interest rates (30%), education, training and childcare (30%) and provision of public services (24%), with community, family and social services (21%) and energy (21%) now rounding out the top ten.

Generational differences persist. Amid the ongoing COVID-19 pandemic, hospitals, healthcare and ageing continues to dominate concerns among those aged 55 years and over (71%).

In contrast, 18 to 34 and 35 to 54 year olds most want to see Government action on cost of living (58% and 69%, respectively).

With younger adults seeing their early career years disproportionately impacted by COVID-19, education and training is a top five priority for 18 to 34 year olds – instead of the economy and finances.

Living costs and health lead prompted concerns, ahead of the economy, environment and jobs

Most important issues the Australian Government should focus on

(Top 5 most important – **prompted**)

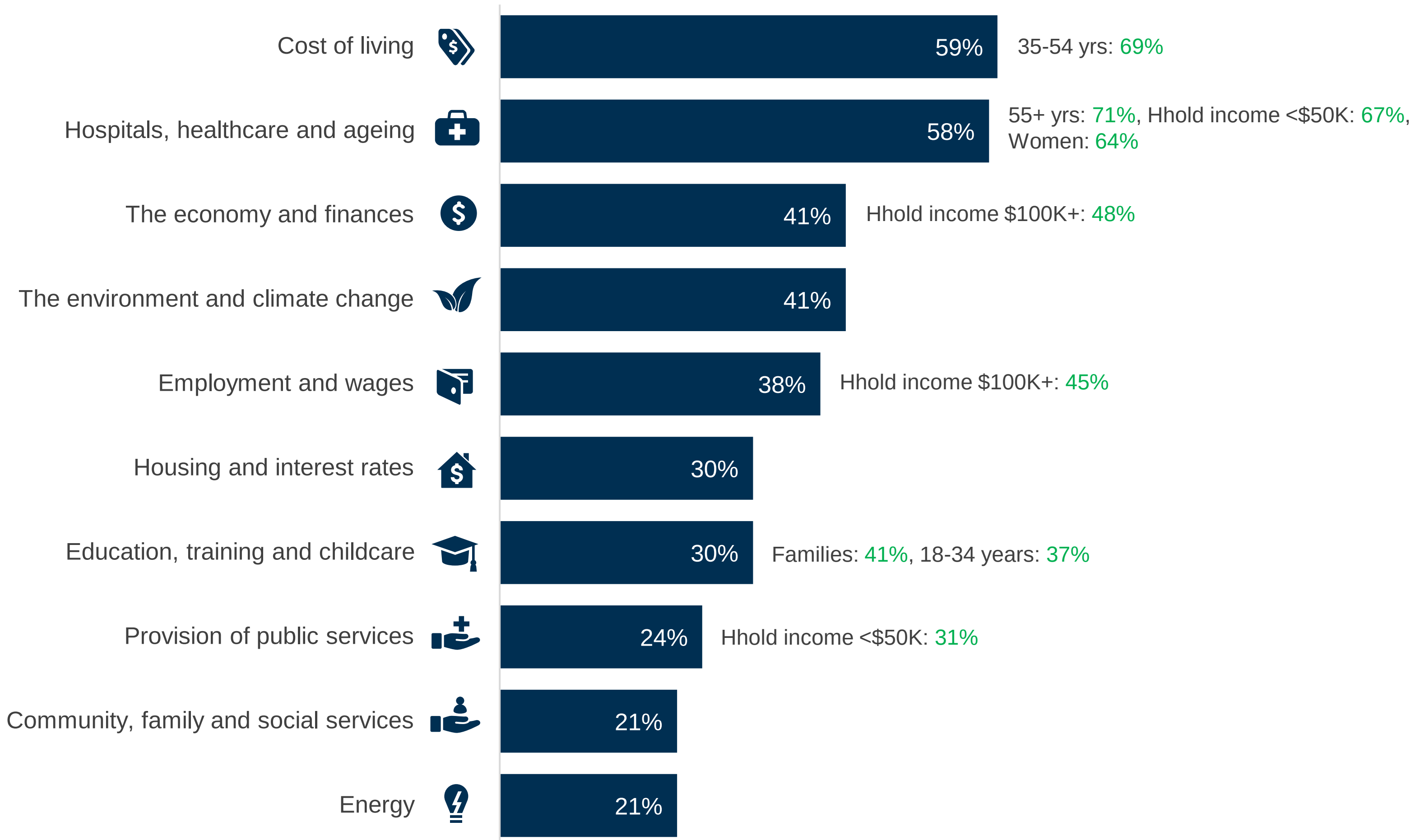
Issue	Nov 2021	Jul 2021	Feb 2021	Nov 2020
Cost of living	59%	57%	53%	52%
Hospitals, healthcare and ageing	58%	62%	58%	55%
The economy and finances	41% ▼	47%	45%	52%
The environment and climate change	41%	37%	37%	38% ▲
Employment and wages	38%	39% ▼	45%	48%
Housing and interest rates	30%	27%	26%	24%
Education, training and childcare	30%	27%	29%	28%
Provision of public services	24%	25%	28%	25%
Community, family and social services	21%	18%	19% ▲	14% ▼
Energy	21%	19%	20%	23% ▲
Defence, security and terrorism	20%	20%	19%	20% ▼
Immigration and border security	20% ▼	25%	22%	23% ▼
Transport and infrastructure	15%	15%	16%	16%
Innovation, science and technology	15%	14%	14%	13%
Population growth	13%	12%	12%	11%
Business and industry	13%	15%	16%	15% ▼
Foreign affairs and trade	12%	12%	13%	14%
Vision, leadership and quality of government	12%	11%	9%	9%
Agriculture and regional development	12%	13%	13%	14%
Mining and resources	6%	5%	5% ▼	8%

Top 10 results

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).

Healthcare remains more important among older adults, women and lower income households

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

As the larger states begin to navigate their way through a new 'COVID-normal', most Australians remain concerned about the COVID-19 pandemic (78%, including 39% extremely or very concerned). This represents a return to previous sentiment after concern peaked in July during Sydney's worsening Delta outbreak (85%, including 50% extremely or very concerned).

Concern across most mainland states is in line with national opinion however, fresh out of many months of lockdown and with a high number of daily cases still emerging, sentiment is significantly stronger in Victoria (85% concerned). In contrast, Queenslanders remain more relaxed (70% concerned), despite the periodic outbreaks in their state.

Most Australians remain concerned about the national economic impact of the pandemic (80%, including 43% extremely or very concerned).

Heading into the next year of Australia's COVID-19 response, other key concerns are:

- the ability of the health system to cope (77%)
- another lockdown due to another wave (70%)
- the impact on children's / students' education (70%)
- not being able to visit family and friends (69%)
- the impact on trade with other countries (69%)
- family or close friends getting infected (68%)
- borders being open to states with an outbreak (67%).

However, having weathered a second winter of COVID-19 and with most eligible Australians now vaccinated, community concern about more lockdowns, being separated from loved ones and open domestic borders have declined since their July peak, back to previous levels. Similarly, Australians are now less concerned about the rollout of vaccines and dying of COVID-19.

Having been spared the significant outbreaks in NSW and Victoria, open borders is a stronger concern in WA and SA, where a majority are extremely or very concerned about this. The ability of the health system to cope with a major outbreak, as yet untested in WA, is also a stronger concern there.

In contrast, after two years with long spells of 'home learning', concern about the educational impacts of COVID-19 is stronger in Victoria.

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

After more lockdowns and a long vaccine rollout, people are less positive about the pandemic response than earlier on

Australians remain most positive about their own personal response to COVID-19 and the health and medical sector response: 65% and 64%, respectively, rate these as very good or good.

While Australia's response in comparison to the rest of the world is now slightly better rated than in July (61% very good or good, compared to 57%), it remains well below the high ratings seen earlier in the pandemic.

Similarly, with vaccines targets met and life returning to a 'COVID normal', more adults feel positive about the response of Australians generally than in July (48% very good or good, up from 42%) – but, again, not the majority of adults seen previously.

The response of State and Territory Governments has not improved since declining in July (52% very good or good, compared to 53%) but they continue to outperform their national counterparts.

Similar to the national response, rating of the Australian Government's response is only slightly better than its series low in July (40% very good or good, compared to 38%) and well below the majority positive sentiment seen earlier in 2021 and in 2020.

Across the mainland states, SA and WA remain most positive about their State Government's performance: 74% and 67% of residents, respectively, rate this as very good or good. However, this represents a weakening of positive sentiment in WA since July.

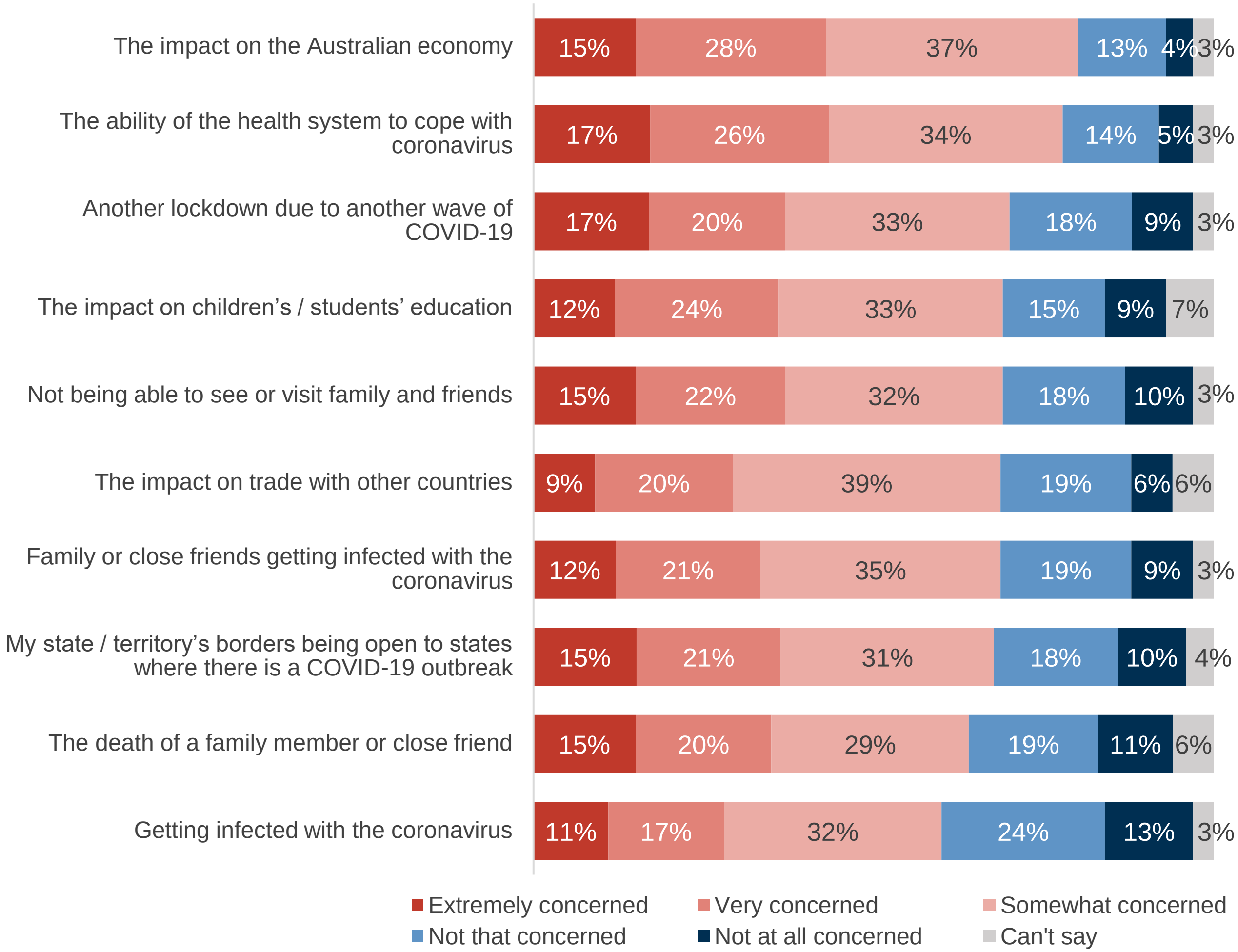
Sentiment in NSW and Queensland is similar to the national average – at least twice as many rate their State Government's performance as very good or good, than as very poor or poor.

However, after a second year of long and harsh restrictions, fewer Victorians rate their State Government's response to COVID-19 as very good or good (43%) and more rate it as very poor or poor (29%), relative to other states.

Similar to other groups, ratings of business and industry and local council responses to COVID-19 (44% and 39% very good or good, respectively) are also only slightly more positive than in July and remain below previous ratings.

Fewer Australians concerned about more lockdowns, separation from loved ones and open domestic borders

Level of concern in relation to COVID-19



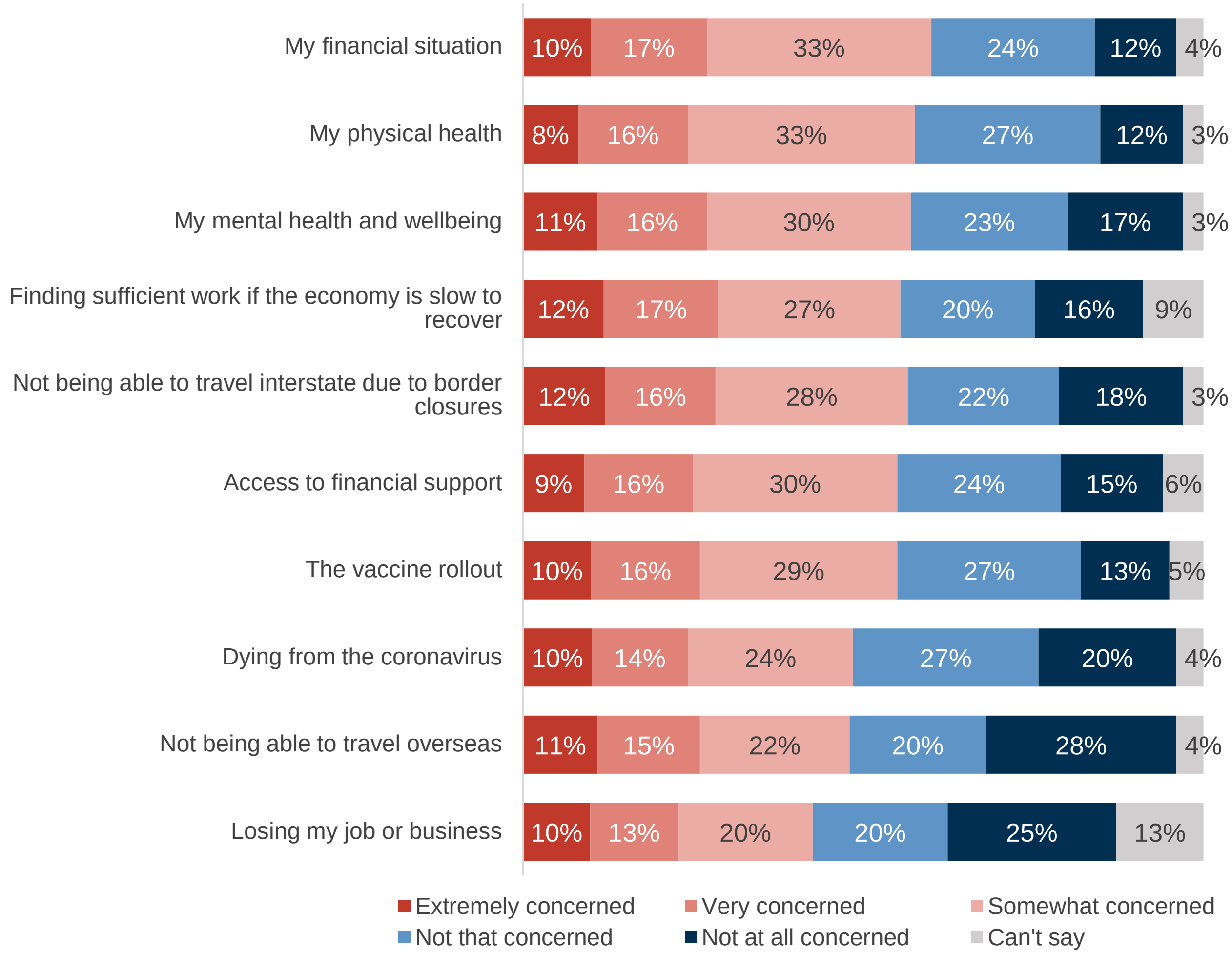
Total concerned

	Nov 2021	Jul 2021	Feb 2021	Nov 2020
The impact on the Australian economy	80%	82%	85%	85%▼
The ability of the health system to cope with coronavirus	77%	78%▲	70%	70%
Another lockdown due to another wave of COVID-19	70%▼	74%▲	68%	72%
The impact on children's / students' education	70%	67%	-	-
Not being able to see or visit family and friends	69%▼	73%▲	68%	68%
The impact on trade with other countries	69%	71%	74%	73%
Family or close friends getting infected with the coronavirus	68%	70%▲	65%	68%
My state / territory's borders being open to states where there is a COVID-19 outbreak	67%▼	75%▲	71%	68%
The death of a family member or close friend	64%	66%	63%	64%
Getting infected with the coronavirus	60%	62%	58%	61%

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 (n=1,000).

Financial and health impacts continue to lead concerns

Level of concern in relation to COVID-19 (cont'd)



Total concerned

	Nov 2021	Jul 2021	Feb 2021	Nov 2020
My financial situation	60%	58%	59%	60%
My physical health	57%	59%	55%	56%
My mental health and wellbeing	57%	55%	52%	53%
Finding sufficient work if the economy is slow to recover	56%	54%	56%	56%
Not being able to travel interstate due to border closures	56%	57%	53% ▲	47%
Access to financial support	55%	57%	-	-
The vaccine rollout	55% ▼	74%	-	-
Dying from the coronavirus	49% ▼	54% ▲	44% ▼	49%
Not being able to travel overseas	48%	48%	48%	48%
Losing my job or business	43%	42%	43%	43%

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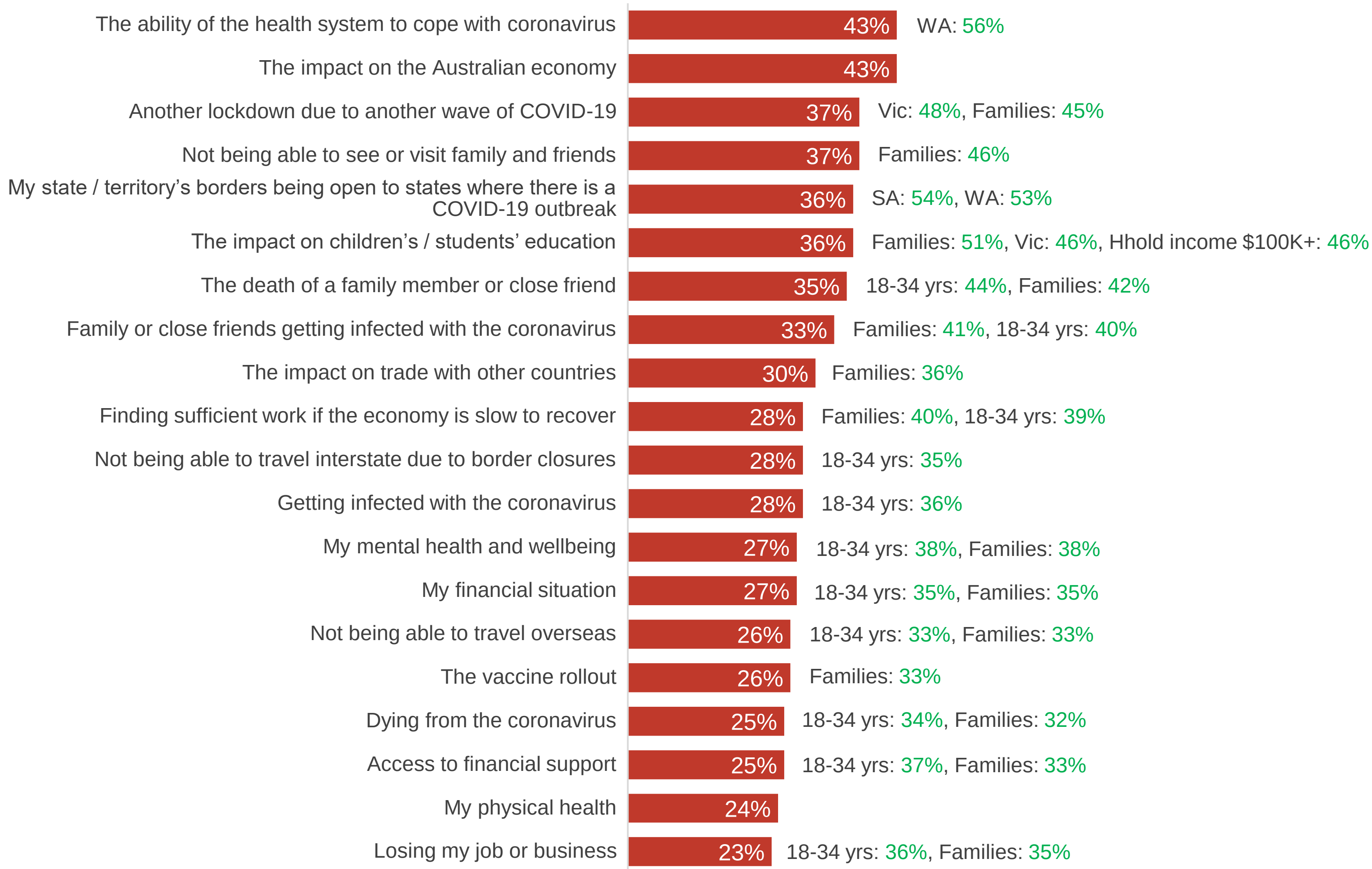
Significantly ▲ higher / ▼ lower than previous True Issues wave at the 95% confidence interval.
Q. Please rate your level of concern with each of the following considerations in relation to the COVID-19 coronavirus.
Base: All respondents (n=1,000).

Open borders a stronger concern in SA and WA, while Victorians worry about educational impacts

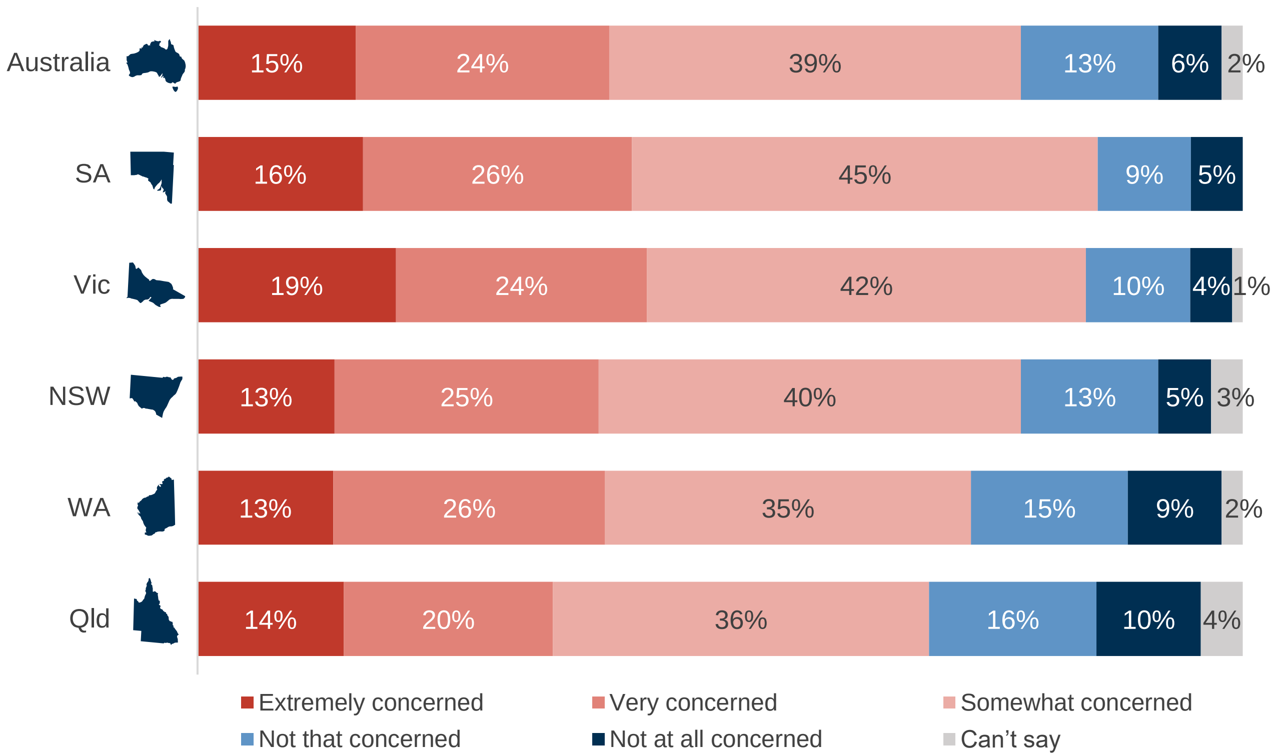
Level of concern in relation to COVID-19
(Total ‘extremely’ + ‘very’ concerned)



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).

Less than eight in ten Australians now concerned about the pandemic, fewer than the July 2021 peak

Overall concern about the COVID-19 pandemic



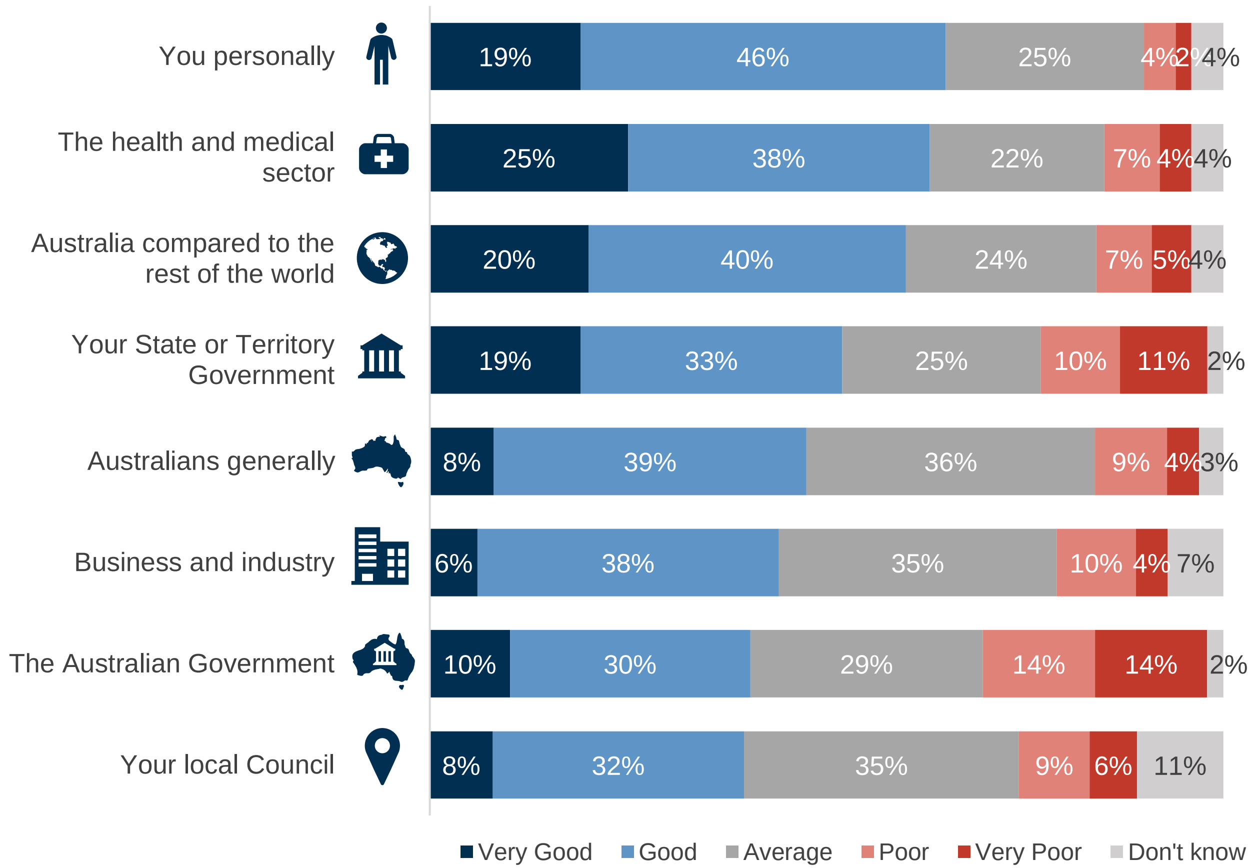
Total concerned

	Nov 2021	Jul 2021	Feb 2021	Nov 2020
Australia	78%▼	85%▲	81%	80%
SA	86%	90%	80%	84%
Vic	85%	87%	86%	84%
NSW	78%▼	87%	83%	81%
WA	74%	80%	76%	77%
Qld	70%	78%	71%	75%

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

Ratings of COVID-19 responses steady after July decline and improved for general community response

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



	Total good			
	Nov 2021	Jul 2021	Feb 2021	Nov 2020
You personally	65%	68%	72%	73%
The health and medical sector	64%	65%	-	-
Australia compared to the rest of the world	61% SA: 76%	57%▼	79%	80%
Your State or Territory Government	52% SA: 74%, WA: 67%	53%▼	64%	67%
Australians generally	48%▲	42%▼	59%	58%▲
Business and industry	44%	40%▼	50%	52%
The Australian Government	40%	38%▼	56%	60%▼
Your local Council	39% SA: 56%	37%▼	45%	45%

Significantly ▲higher / ▼lower than previous True Issues wave at the 95% confidence interval.
Significantly higher 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=1,000).

Are we headed in the right direction?

On balance, Australians still see things as heading in the right direction but their optimism has waned over 2021

After a new year's peak in confidence in February, a second year of disruption due to the COVID-19 pandemic has seen public sentiment decline over 2021. Almost as many Australians now see the national economy heading in the wrong direction as see it heading in the right direction.

Australians remain most positive about their own personal situation, with 37% feel they are heading in the right direction (compared to 39% in July and 43% in February). This remains more than double those who feel they are heading in the wrong direction (17%).

Similarly, people remain confident about their local community: 32% feel it is heading in the right direction (compared to 36% in July and 37% in February), almost twice those who feel it is heading in the wrong direction (17%).

More adults also see business and industry heading in the right direction (28%, compared with 30% in July and 31% in February) than see it heading in the wrong direction (17%).

However, there are now very mixed views on the national economy: 27% see it heading in the right direction (compared to 30% in July and 33% February) and almost as many (26%) as see it heading in the wrong direction (compared to 26% in July and 23% in February).

Confidence in state and territory economies remains stronger by comparison but continues to edge off at a national level: 34% right direction (compared to 37% in July and 40% in February) and 17% wrong direction.

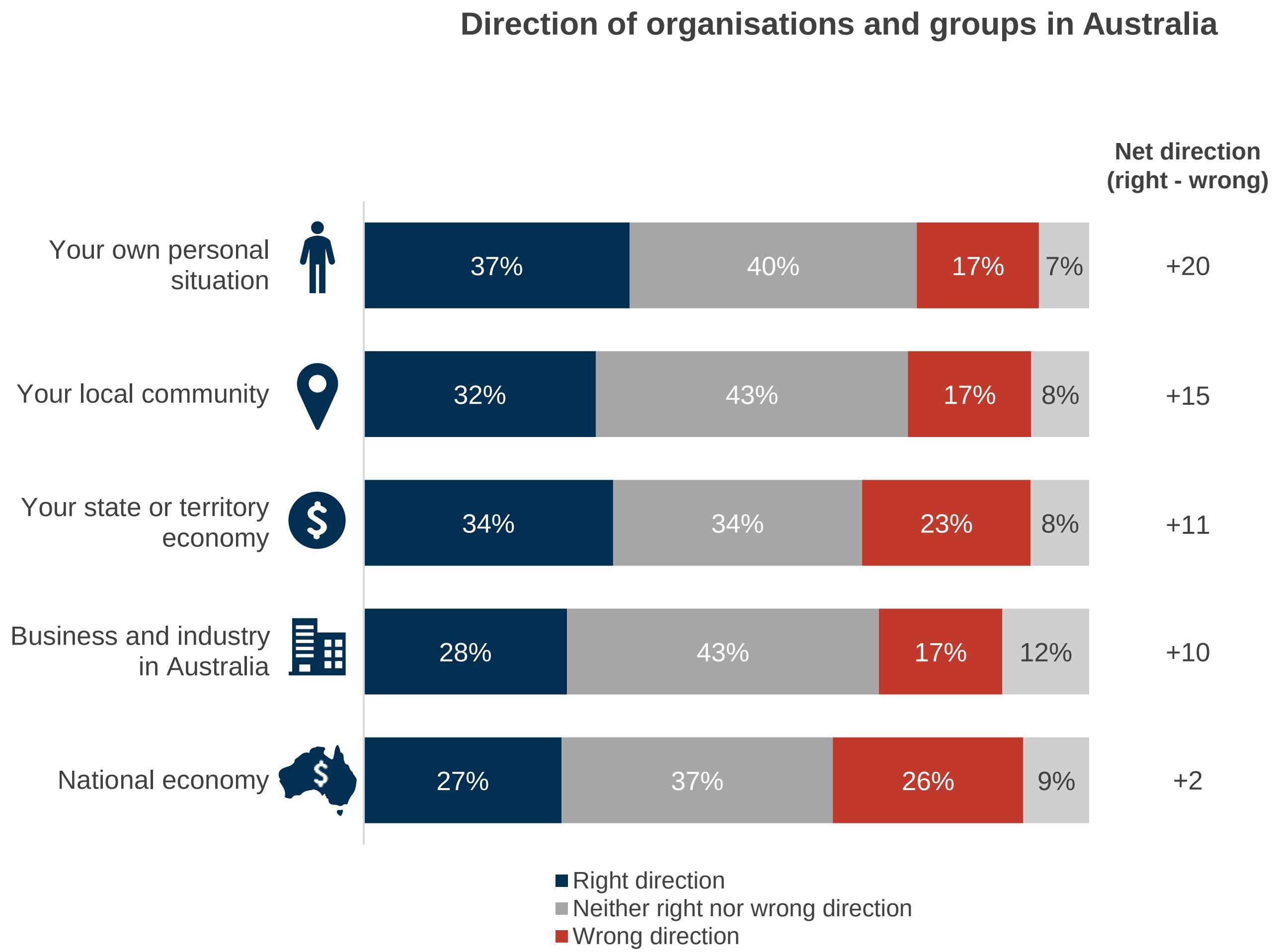
Less disrupted by COVID-19, a majority of WA residents (53%) continue to see their state economy as heading in the right direction.

Residents of SA and NSW also continue to be optimistic, on balance, with more residents feeling their state economy is heading in the right direction than feel it is heading in the wrong direction.

In contrast, sentiment has declined in Queensland since July: 29% see its economy heading in the right direction but almost as many (27%) as see it heading in the wrong direction.

Similarly, opinion is very mixed among Victorians after a second year of long, strict lockdowns: 29% see their economy heading in the right direction and 28% see it heading in the wrong direction.

Australians remain most optimistic about their own personal situation and local community



***Significantly* higher among:**

Right direction: SA: 55%, Hhold income $100K+: 52%, Hhold income $75K-$100K: 46%

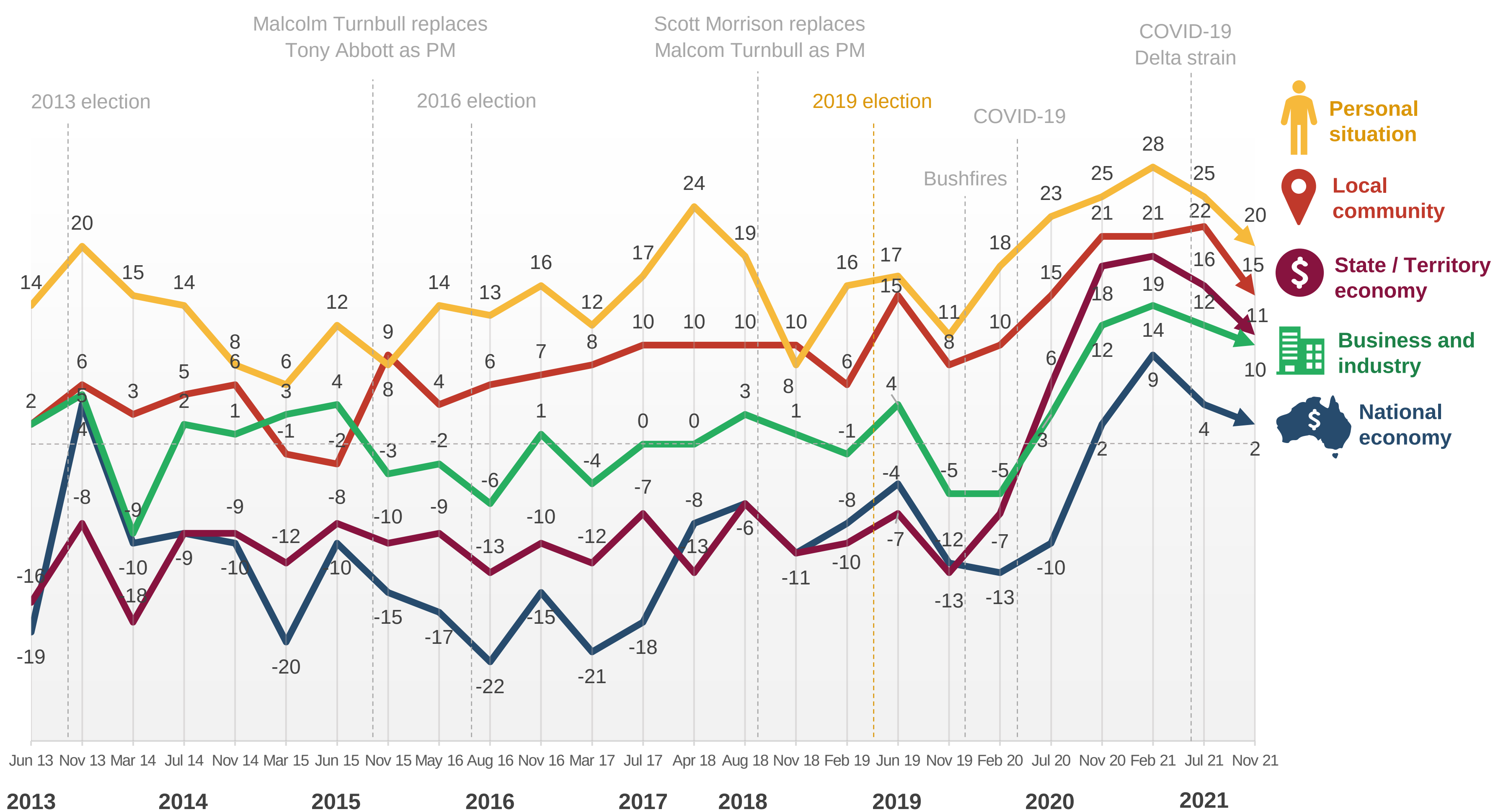
Right direction: SA: 44%, WA: 42%, 18-34 yrs: 39%

Right direction: WA: 53%, SA: 49%
Wrong direction: 55+ yrs: 29%

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).

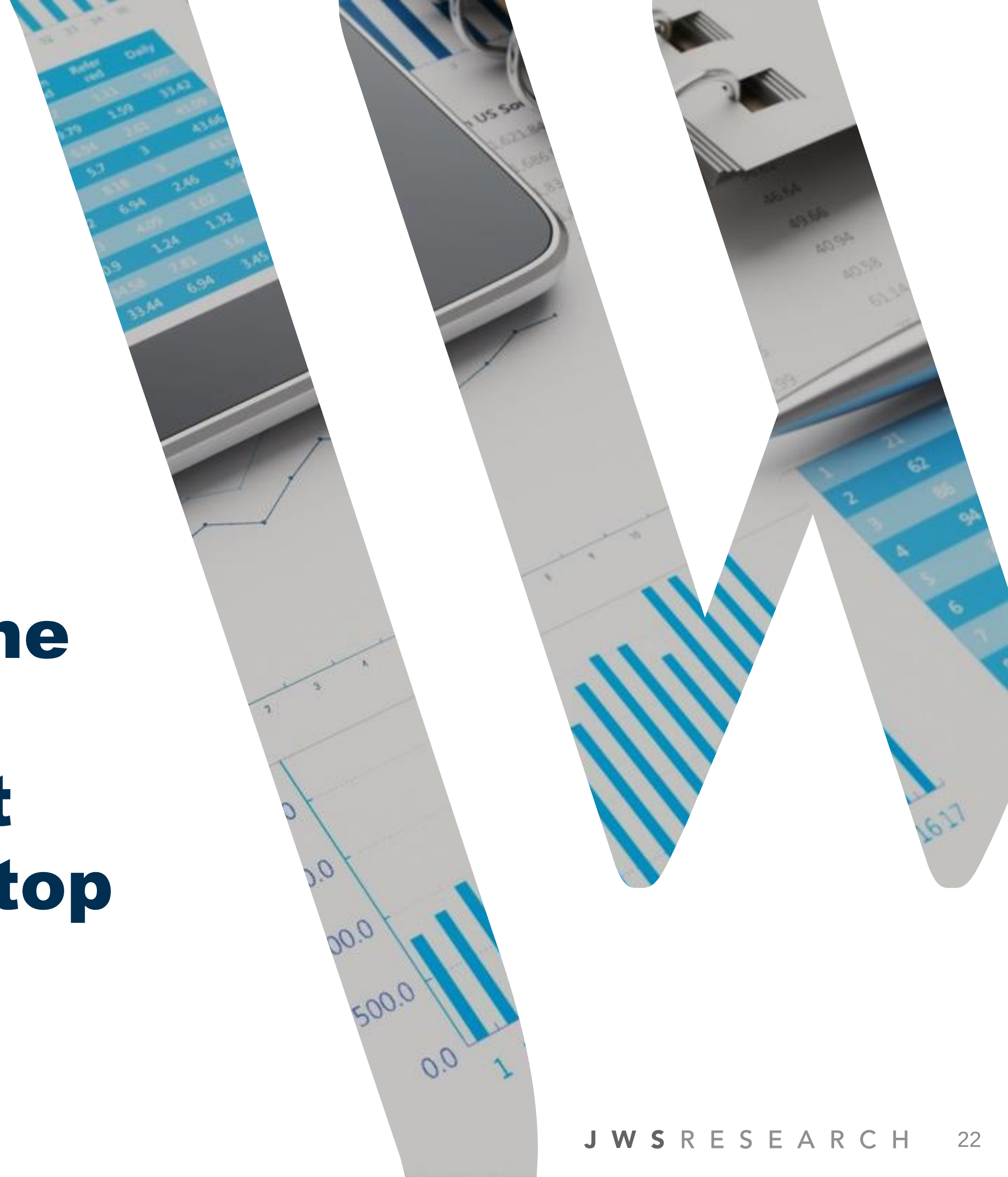
Optimism continues to slide for business, economies, communities and personal circumstances

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 ratings have weakened across key areas since July

Heading into its next campaign for re-election, the Federal Government's performance ratings have fallen since July across all key areas except immigration and border security, where it is unchanged.

Notably, the Morrison Government's largest performance declines have been in some of its traditionally stronger areas, such as business and industry (index of 52, down five points) and mining and resources (index of 52, down four points).

On the back of the recent COP26 UN climate change conference in Glasgow and amid ongoing public tensions with China, a similar decline is seen on foreign affairs and trade (index of 48, down four points). However, the Government continues to perform strongly on defence, security and terrorism (index of 56, down three points).

Other notable declines are on cost of living (index of 38, down four points) and housing and interest rates (index of 43, down four points), both key community pressure points where the Government is already seen to be performing poorly. This is in addition to another enduring public concern – education, training and childcare (index of 50, down four points).

Other leading community priorities, where the Government remains poorly rated, include the environment and climate change (index of 41, down three points), hospitals healthcare and ageing (index of 45, down three points) and employment and wages (index 46, down two points), and it attracts only an average rating (index of 50, down three points) for its handling of the economy and finances.

Notably, younger Australians and those with dependent children typically rate the Government's performance significantly above average across most issue responsibility areas, while those aged 55+ years tend to be more critical.

Government performance has declined across most key areas to its poorest ratings of the last 12 months

Australian Government performance on issues
(Performance index#)

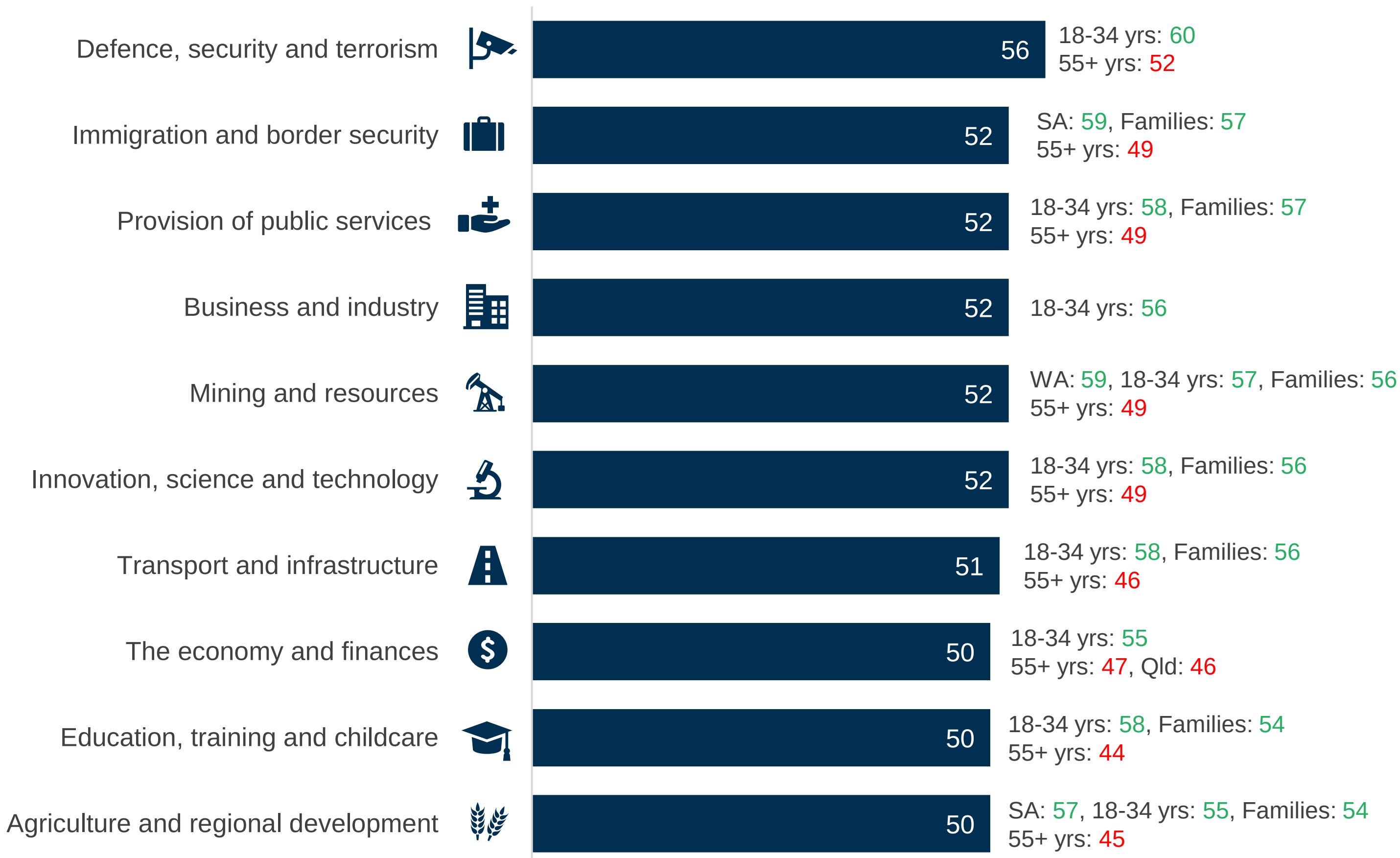
Issue	Nov 2021	Jul 2021	Feb 2021	Nov 2020
Defence, security and terrorism	56	59	61	59
Immigration and border security	53	53	54	55
Provision of public services	52	55	55	55
Business and industry	52	57	57	56
Mining and resources	52	56	56	55
Innovation, science and technology	52	54	54	54
Transport and infrastructure	51	54	53	53
The economy and finances	50	53	53	53
Education, training and childcare	50	54	53	53
Agriculture and regional development	50	52	52	51
Population growth	49	53	50	52
Community, family and social services	49	51	53	53
Foreign affairs and trade	48	52	51	52
Employment and wages	46	48	48	48
Hospitals, healthcare and ageing	45	48	50	50
Energy	45	48	46	47
Housing and interest rates	43	47	48	50
Vision, leadership and quality of government	43	46	48	52
The environment and climate change	41	44	44	46
Cost of living	38	42	42	43

Top ten results

 # 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).

Young adults and families rate Government performance more favourably across most key areas

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



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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 and State / Territory Government performance ratings continue to decline

The Morrison Government's performance continues to rate above pre-COVID-19 levels but has fallen further since July (index of 50, down from 52). This extends the steady decline from its series high result in July 2020 (index of 63) towards the poorer sentiment recorded prior to the pandemic (index scores below 50).

The number of Australians who rate the Federal Government's performance as very good or good (35%) has declined since July (41%) and sits well below its July 2020 peak (58%). Ratings of its performance as very poor or poor (28%) remain similar to July (27%) but are almost twice as high as in July 2020 (15%). Notably, this is still below pre-pandemic levels.

State and Territory Governments continue to attract more positive performance ratings than their Federal counterpart, however their ratings have also been on the decline since a series high in November 2020 (index of 64), falling a further three points since July (index of 57, down from 60).

Also outperforming the Federal Government but little changed over the past year are business and industry (index of 57) and local councils (index of 54).

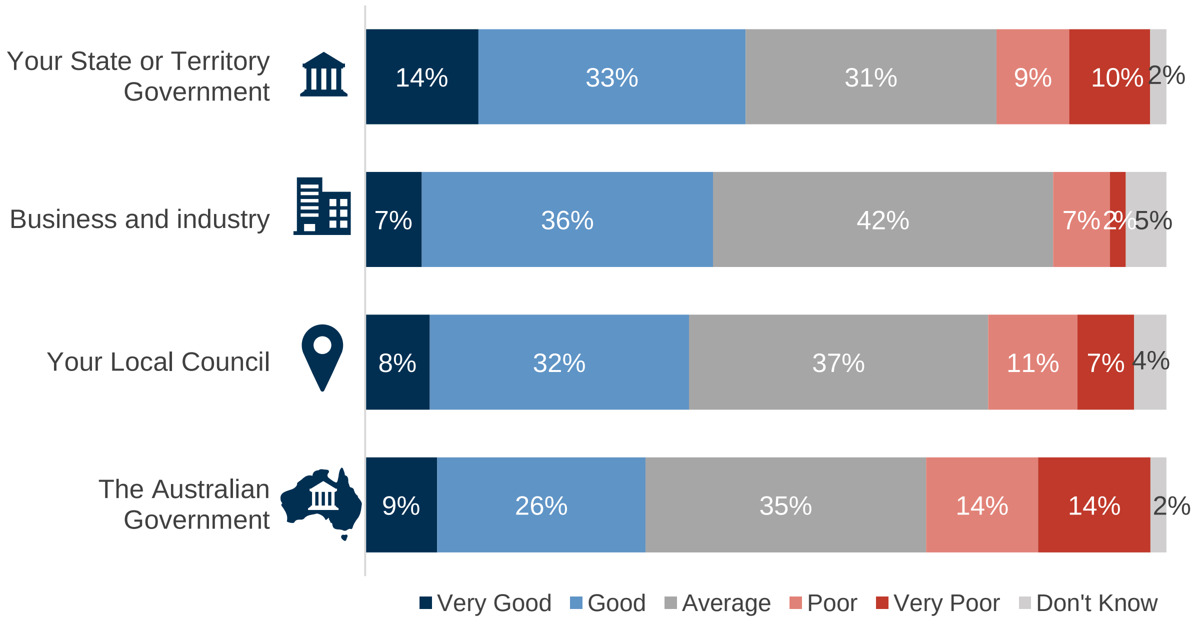
As each state and territory continues to find its 'COVID normal', the WA and SA State Governments significantly outperform other states with a performance index score of 65 each. Again, this represents a weakening of positive sentiment in WA since July.

The rated performance of State Governments in NSW and Queensland (index of 56 for each) are in line with the national average.

However, after Melbourne took the title of world's most locked down city, the Victorian Government has lost the ground it recovered in July and fallen back below other states in November (index of 52).

State and Territory Governments and business and industry outperform Local and Federal Government

Performance of organisations and groups in Australia



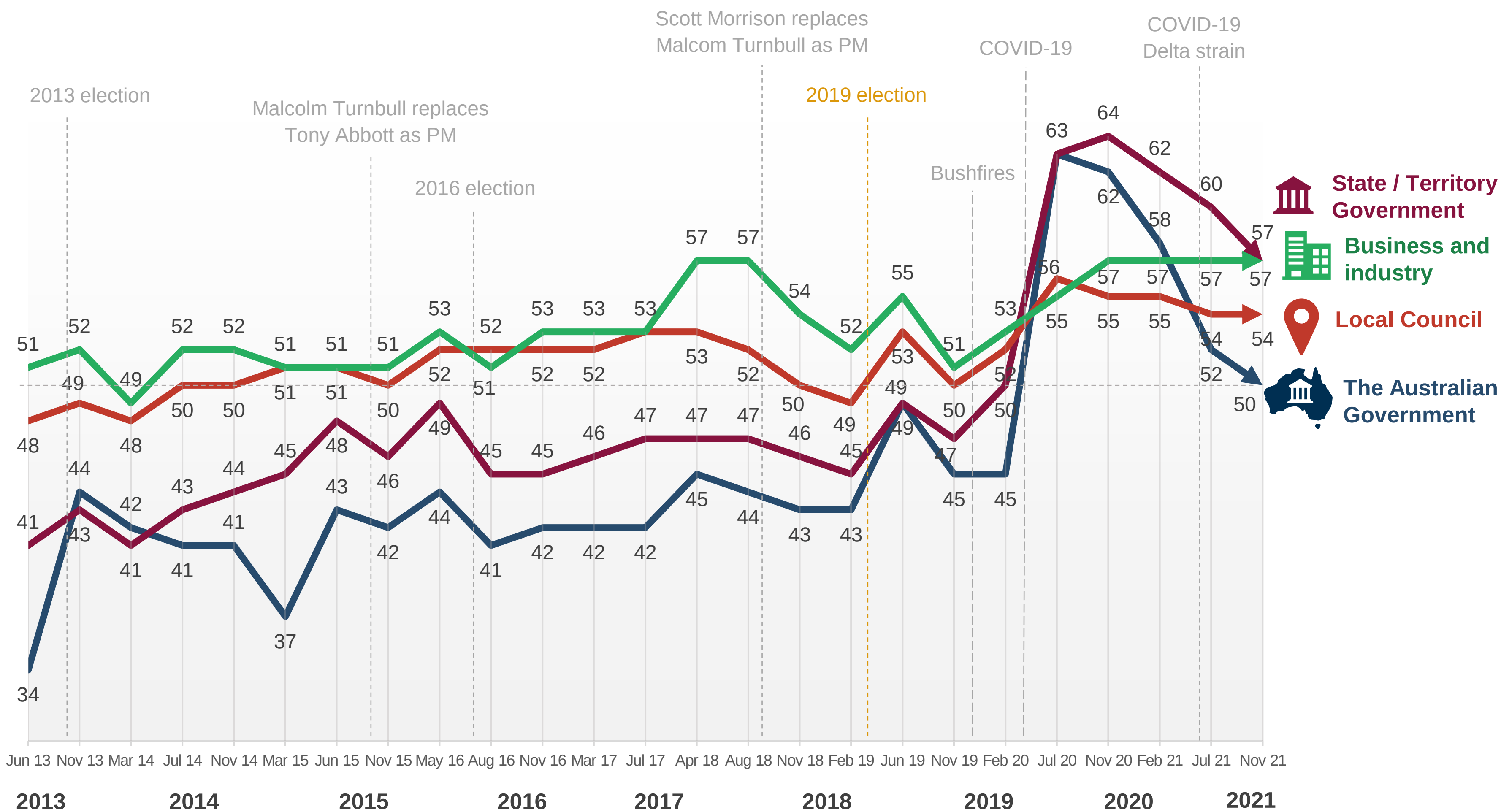
	Index score#	*Significantly* different among:
Your State or Territory Government	57	WA: 65, SA: 65 Vic: 52
Business and industry	57	SA: 64, Hhold income $100K+: 61, 18-34 yrs: 61
Your Local Council	54	SA: 65, 18-34 yrs: 59, Hhold income $100K+: 57 Regions: 50
The Australian Government	50	SA: 58, 18-34 yrs: 56, Families: 54

#For an explanation of how index scores are calculated refer to the research methodology section of this report.
Significantly higher / lower than the national total at the 95% confidence interval.
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, State and Territory Government performance continues to decline but remains above pre-COVID-19 levels

Performance of organisations and groups in Australia

Index score trend#



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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).

THERE ARE OVER 25 MILLION PEOPLE IN AUSTRALIA...

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