

Contents



Voting attitudes	<u>3</u>
Understanding and information	<u>13</u>
Methodology	21



Double majority appears out of reach for the YES case, as the NO vote continues to grow for an Indigenous Voice



Days out from the October 14th referendum, the total NO vote has continued to increase and has now overtaken the YES vote on establishing an Aboriginal and Torres Strait Islander Voice.

Almost half (48%) of voters do <u>not</u> support an alteration to the Constitution that establishes an Aboriginal and Torres Strait Islander Voice and will vote (or have already voted) NO in the October 14th referendum. NO votes have continued their upward trend from 37% in June, 28% in February and 23% in August 2022.

Less then four in ten voters (36%) now support this change and will vote (or have already voted) YES, similar to 39% in June but lower than 42% in February and 43% in August 2022.

Significant increases among women, all age groups and in WA and SA over the past four months have contributed to the overall increase in the NO vote.

Few voters feel they are still in need of more information or undecided (16%, down from 23% in June and 30% in February). Four in ten among this group are already leaning toward a YES or NO vote.

Taking these leanings into account, overall, a slight majority (52%) of voters will vote (or have voted) NO. This is up from 43% in June and 36% in February.

Fewer (39%) will vote (or have voted) YES, down from 46% in June and 51% in February. Just 9% remain undecided.

The NO vote also outweighs the YES vote at state level, except in Victoria where the vote is evenly split.

By gender, a fall in the YES vote and increase in the NO vote among women sees them now largely against an Indigenous Voice to Parliament, in line with their male counterparts.

Young voters (aged 18 to 34 years) remain most supportive, despite a drop in their YES vote since June, while a majority of 35 to 54 year olds and older voters (aged 55 years and over) will or have voted NO.

Views also divide along political lines, with Greens and ALP supporters largely set to vote YES on October 14th, while most supporters of the Liberals / Nationals and other minor parties and independents will vote NO.

It is not surprising that voters who recall seeing mainly opposing information, advertising, media stories or social media posts about the referendum are more likely to vote NO (52%) than YES (43%). However, it remains problematic for the YES campaign that voters who have seen mostly supportive information about the Voice are also more likely to vote NO (61%) than YES (34%).

Most voters will turn out to vote in the October 14th referendum with YES and NO voters equally motivated



Most voters say they are likely to turn out and cast a formal vote in the October 14th referendum (71%) or have already cast an early vote (20%). Motivation is equally strong for both YES and NO voters – more than nine in ten from each group are likely to vote or have already done so.

Few voters are unlikely to turn out (5%). A further 4% are currently undecided, higher among those still unsure how they will vote (30%).*

Compared with the wider electorate, young voters (aged 18 to 34 years) remain a little less enthusiastic to participate, with one in five unlikely or only 'somewhat' likely to turn out to vote. In contrast, most of the least supportive older cohort (55 years and over) are 'extremely' likely to turn out or have already voted.

Overall, among voters who have decided on or are leaning towards a YES or NO vote, and who are likely to turn out to vote (or have voted), a majority (57%) are voting NO to establishing an Aboriginal and Torres Strait Islander Voice to Parliament. Just 43% will or have voted YES.

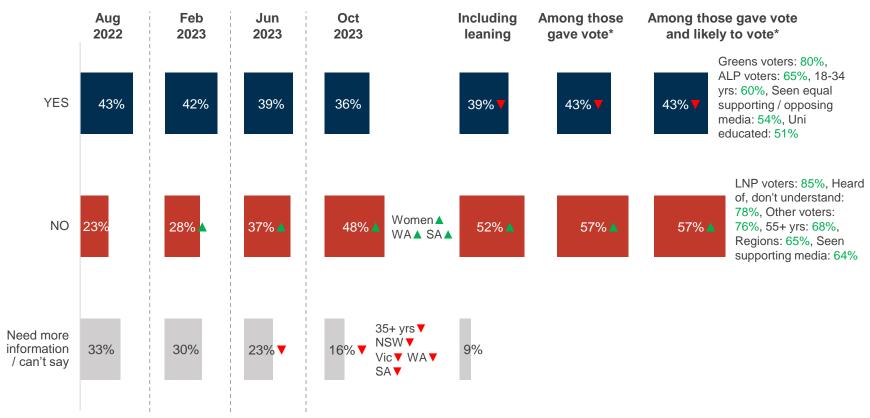
This trend is repeated across the mainland states, except in Victoria, where the vote is evenly split.

Among those who have already cast their vote, the NO vote outstrips the YES vote by more than 2:1 however this is in part due to the early voters being largely from less supportive older cohorts, particularly those aged 55 years and over.

NO votes outweigh YES votes on an Indigenous Voice after further increase in the NO vote since June



Voting intention in the proposed referendum to establish an Aboriginal and Torres Strait Islander Voice



^{*} Excludes 'Can't say'

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

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

Base: Aug 2022 – Australian adults (n=1,000), Feb 2023 – Voters (n=940), Jun 2023 – Voters (n=1,122), Oct 2023 – Voters (n=922), Gave vote (n=841), Gave vote / likely to vote (n=789).

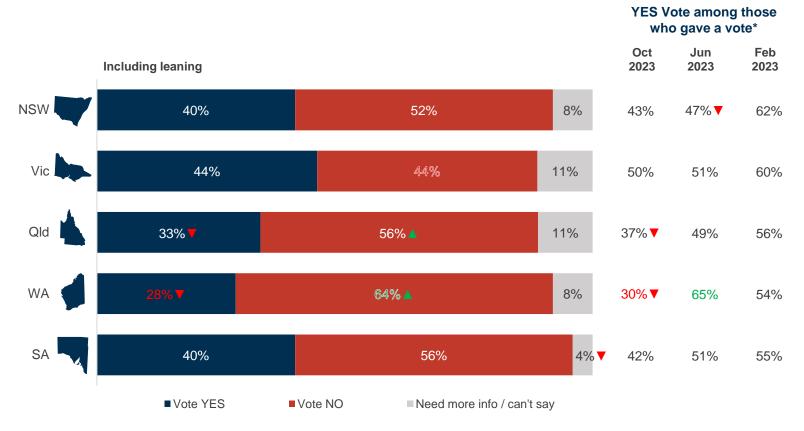
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Q. The Australian Government is proposing to add the following points to the Australian Constitution. This would ensure an Indigenous Voice to Parliament that continues under future governments. In recognition of Aboriginal and Torres Strait Islander peoples as the First Peoples of Australia: 1. there shall be a body, to be called the Aboriginal and Torres Strait Islander Voice; 2. the Aboriginal and Torres Strait Islander Voice may make representations to the Parliament and the Executive Government of the Commonwealth on matters relating to Aboriginal and Torres Strait Islander peoples; 3. the Parliament shall, subject to this Constitution, have power to make laws with respect to matters relating to the Aboriginal and Torres Strait Islander Voice, including its composition, functions, powers and procedures. In the referendum to be held next Saturday 14th October, how will you answer the referendum question: "Do you approve this alteration to the Constitution to recognise the First Peoples of Australia by establishing an Aboriginal and Torres Strait Islander Voice?" / Even if you're not sure, which way are you currently leaning?

NO vote leads the YES vote in the mainland states, except in Victoria where opinion is evenly split



Voting intention in the proposed referendum to establish an Aboriginal and Torres Strait Islander Voice – by state[^]



^{*}Excludes 'Can't say'

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

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

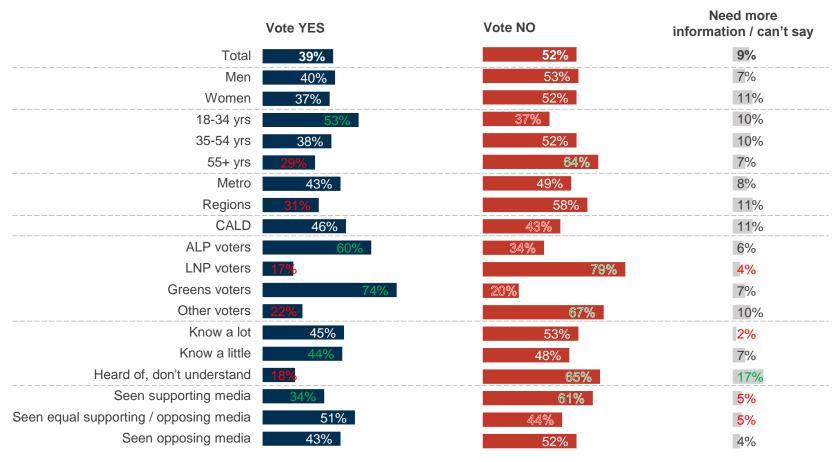
Base: Gave vote – Oct 2023 (n=841), Jun 2023 (n=995), Feb 2023 (n=822). ^Tasmania excluded due to small sample size. Note: Question wording updated in June 2023 to reflect latest proposed referendum wording.

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Entrenched generational divide with majority YES vote among 18-34s, and majority NO vote among older groups



Voting intention in the proposed referendum to establish an Aboriginal and Torres Strait Islander Voice (including leaning) – by demographics



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

Q. The Australian Government is proposing to add the following points to the Australian Constitution. This would ensure an Indigenous Voice to Parliament that continues under future governments. In recognition of Aboriginal and Torres Strait Islander peoples as the First Peoples of Australia: 1. there shall be a body, to be called the Aboriginal and Torres Strait Islander Voice; 2. the Aboriginal and Torres Strait Islander Voice may make representations to the Parliament and the Executive Government of the Commonwealth on matters relating to Aboriginal and Torres Strait Islander peoples; 3. the Parliament shall, subject to this Constitution, have power to make laws with respect to matters relating to the Aboriginal and Torres Strait Islander Voice, including its composition, functions, powers and procedures. In the referendum to be held next Saturday 14th October, how will you answer the referendum question: "Do you approve this alteration to the Constitution to recognise the First Peoples of Australia by establishing an Aboriginal and Torres Strait Islander Voice?" / Even if you're not sure, which way are you currently leaning?

JWSRESEARCH

Base: Voters (n=922).

Why Australians would <u>vote YES</u> to establishing an Aboriginal and Torres Strait Islander Voice



"Will provide symbolic recognition of the sovereignty of First Nations people in Australia and show the Government that the people support more and stronger legislation to close the gap, reduce inequality and support self determination."

"It will give First Nations people some measure of self determination and will give them back some dignity."

"I think they deserve recognition in the Constitution and a permanent voice."

"Because I believe it is the right thing to do."

"Voting YES provides protected access to consultation and consideration for First Nations Australians with the Australian Government. A Voice is not subject to changes in political views, it acts as a balance and a reminder to the Government that they need to consider the specific needs and opinions of First Nations people, and it is a step towards Treaty and sovereignty."

"There are more positives than negatives in voting YES."

"Indigenous people are asking for it."

"200+ years of telling First Nations people how to live their lives...they need to be able to tell Parliament what they think."

"As white Australians we need to recognise our Indigenous heritage and stop ignoring it."

"We should as a country feel ashamed that it has taken this long for Constitutional recognition and further, that the gap between non-Indigenous and Indigenous outcomes in this country is so great and not closing. ... Not only is this morally the right thing to do, in the long run it helps everyone, diversity, respect and fiscal effectiveness."

"Everything we have tried so far to close the gap has failed. This is worth trying as it will mean our politicians are listening directly to Indigenous Australians."

"To better get opinions of Aboriginal and Torres Strait Islanders on issues that affect them, creating better outcomes for them and better spent money."

"Recognition and allowing First Nations to have a voice in the solutions to their problems."

"I see it as a new way forward to address issues of inequality and assist in the formulation of policies which are more targeted. I also feel that a NO vote will send a message to ATSI people that they are disregarded and disrespected.."

"To improve representation of Indigenous voices and to allow for positive changes going forward."

"May be a small step but a small step is better than no step at

"I respect the people who are promoting the YES vote."

Why Australians would <u>vote NO</u> to establishing an Aboriginal and Torres Strait Islander Voice



"I don't believe a change to Constitution is required (or Treaty for that matter). I don't believe "the Voice" would actually address the real issues for Indigenous people. There are already Indigenous people represented in Parliament. I don't trust the Government's lack of transparency."

"Creates division based on race. No mention of how large the Voice panel will be, how many members, their reach, oversight of the Voice staff, how much they are paid."

"Australians should not be divided by race. Aboriginal people already have elected members of Parliament to look after their interests."

"The proposal is racist and divisive. It provides additional powers and privilege to one particular ethnic group within Australian society.

"Will not achieve anything worthwhile and there should not be a change to the Constitution for a minority group of people."

"It is not going to improve anything where it is needed and will divide the nation even more."

"I've seen too many Aboriginal elders say they're against it, so I'm supporting their wishes to vote NO."

"If I hear Indigenous people pushing the NO, it says more to me than anyone supporting the YES vote." "The Voice should have been determined and agreed upon before the referendum was established. I believe most Australians do not have a problem with the recognition aspect, but the actual establishment of the Voice is only talked about in general terms... They have put the 'cart before the horse'."

"There hasn't been enough information which has caused a lot of arguments and mis-information"

"There is so much contradicting information."

"I don't have enough information available to be able to tell how it will be created, who will be on the Voice, how it will work and the powers it will have.

"There is no plan laid out about how this is going to all look like and not all Aboriginal and Torres Strait Islander people think and believe the same. Their thoughts and actions are all dependent on their community, culture and experiences."

"There are more important issues and I don't want the Constitution changed. It is causing division."

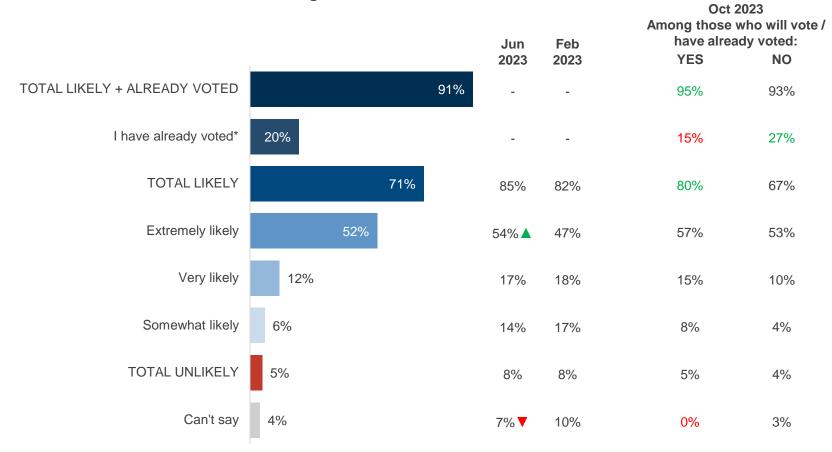
"Because it's a permanent change to the Constitution that we actually don't know what it will do in the long run."

"Creating division, and once in the Constitution there will be never ending legal disputes."

Most voters on both sides of the Indigenous Voice debate are likely to turn out for the referendum (or already have)



Likelihood to vote in the referendum about establishing an Aboriginal and Torres Strait Islander Voice



^{* &#}x27;Already voted' added in October 2023

Significantly ▲ higher / ▼ lower than previous wave at the 95% confidence interval. Differences between October and June results not shown due to change in codeframe in October.

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

Q. The referendum about establishing an Aboriginal and Torres Strait Islander Voice will be held next Saturday 14th October. How likely are you to attend a polling booth (or source a postal vote) and cast a formal vote in this referendum?

Base: Voters – Oct 2023 (n=922), Jun 2023 (n=1,122), Feb 2023 (n=940), Vote YES (n=364), NO (n=477).

Over 55s and more knowledgeable voters most likely to turn out on October 14th – one in four over 55s already voted

Likelihood to vote in the referendum about establishing an Aboriginal and Torres Strait Islander Voice

	Total	18-34 yrs	35-54 yrs	55+ yrs	CALD	Know a lot	Know a little	Heard of, don't understand
TOTAL LIKELY / ALREADY VOTED	91%	87%	88%	96%	85%	98%	93%	83%
I have already voted	20%	13%	19%	26%	19%	22%	20%	19%
TOTAL LIKELY	71%	74%	70%	70%	67%	76%	73%	64%
Extremely likely	52%	49%	46%	61%	38%	70%	51%	40%
Very likely	12%	14%	16%	8%	21%	5%	15%	18%
Somewhat likely	6%	11%	8%	1%	8%	1%	8%	6%
TOTAL UNLIKELY	5%	9%	5%	2%	8%	2%	5%	8%
Can't say	4%	4%	7%	2%	7%	0%	2%	9%



Most voters have at least some understanding of how a referendum works and an Indigenous Voice to Parliament



Following information and advertising campaigns to support participation in the 2023 referendum, a majority feel they have a complete understanding (58%, up from 51% in June and 45% in February) and a further one in four (27%) have a partial understanding that this:

- is a vote on Parliament-proposed changes to the Australian Constitution
- · is a compulsory vote
- requires a "YES" or "NO" answer to the referendum question(s)
- requires a double majority of "YES" votes (nationally, and in a majority of states) to be approved.

Few voters feel they have no understanding of how a national referendum works (15%, similar to 18% in June and down from 21% in February).

Voters aged under 40 years are only a little less confident in their understanding of the process than the those old enough to have voted at the November 1999 Republic referendum.

Knowledge of the referendum issue, establishing an Indigenous Voice to Parliament, is further improved since June but remains largely superficial.

More than three quarters of voters know something about the idea of forming a body representing Aboriginal and Torres Strait Islander peoples to advise the Australian Parliament and Government on laws and policies related to Indigenous Australians (78%, up from 70% in June, 60% in February and 45% in August).

This includes one in four who claim to know a lot about the idea (26%, up from 20% in June and 10% in February). However, half of voters claim to know just a little about it (52%, little changed since February).

Over the past year, the number of voters who claim they don't understand the idea of an Indigenous Voice to Parliament has halved (17%, compared with 34% in August 2022), and only 1% claim not to have not heard of this before.

Knowledge has continued to improve among both men and women and across all age groups but remains strongest among older adults.

YES case still more prominent in public debate than the NO case but voter opinion is mixed on the overall campaign

Information, ads, media and social media about the proposed referendum continue to be widely recalled, mainly in support of an Indigenous Voice to Parliament.

Almost nine in ten voters either definitely recall (69%, up from 61% in June) or may have seen (20%) something about this issue. Similar to June, recall is highest among older adults aged 55 years and over and lowest among CALD voters (still a substantial level, at 81%).

Among those who recall seeing something about the Voice, a majority say this was mainly related to supporting the Voice / the YES vote (51%, down from 56% in June). This is far more than have seen content mainly related to opposing the Voice / the NO vote (10%, up from 7%).

Almost three in ten have seen about an equal amount from both sides of the debate (29%, up from 19% in June). Others recall mainly general information about the referendum, neither supporting nor opposing the proposed change (5%, down from 12%).

Voters have mixed views of the overall Indigenous Voice to Parliament referendum campaign. While many rate the campaign as relevant (41%), voters see this campaign in more of a negative light than positive across a range of other attributes, describing it as uninspiring (48%), negative (45%), deceitful (44%),

not credible (42%), not informative (42%), confusing (42%) and unengaging (40%).

Opinion of the overall campaign divides along voting lines, with a majority of YES voters using positive attributes (e.g. relevant, credible, informative) to describe the campaign, while a majority of NO voters use negative attributes (e.g. uninspiring, negative, not credible) to describe it.

Similar to the 2022 federal election campaign, views on the individual YES and NO campaigns are mixed at a national level but more favourably viewed among their respective supporters.

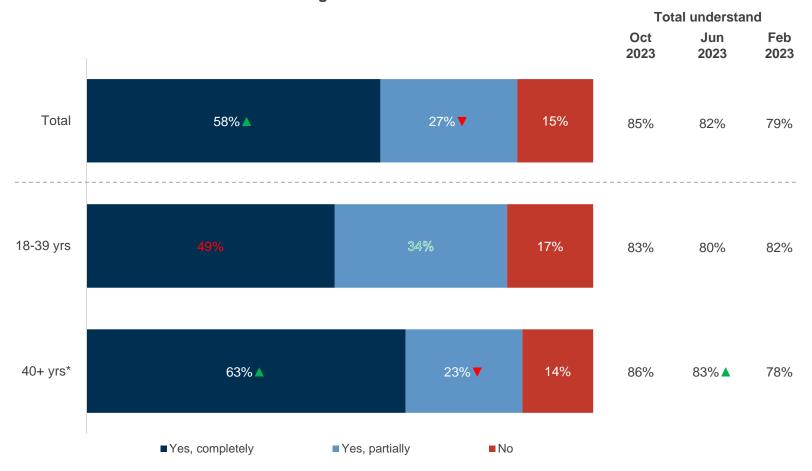
More voters describe the YES campaign as negative (40%) than as positive (34%) or neutral (26%), while perceptions of the NO campaign were more evenly distributed across positive (35%), negative (33%) and neutral (32%) ratings.

However, a majority (80%) of YES voters believe the YES case ran a positive campaign, and a majority (60%) of NO voters believe the NO case ran a positive campaign. Similarly, a majority of ALP and Greens voters view the YES campaign as positive, while supporters of the Liberals / Nationals and other minor parties and independents are more likely believe the NO case ran a positive campaign.

Most voters have at least some understanding of how a referendum works, even those who have never voted in one



Understanding of how national referendums work



^{*}Those of voting age at the last referendum held 6th November 1999 currently aged approx. 42 years and over. Significantly ▲ higher / ▼ lower than previous wave at the 95% confidence interval.

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

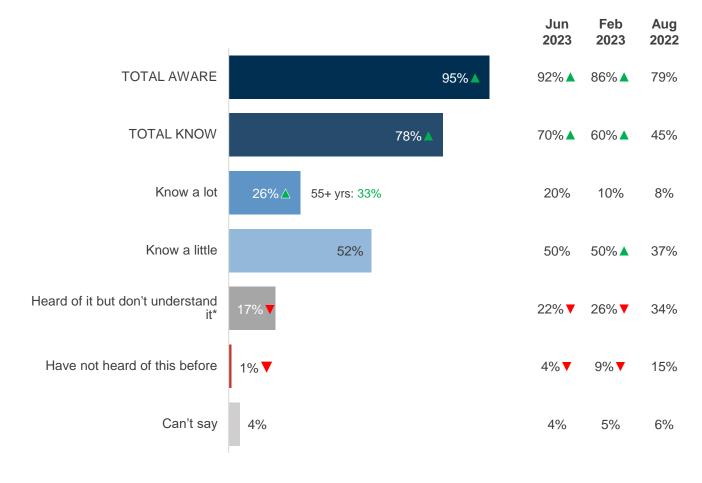
Q. National referendums are held for Australians to vote on Parliament-proposed changes to the Australian Constitution. Similar to elections, it is compulsory to vote. Voters must write either "YES" or "NO" on the ballot paper in answer to the referendum question. For the constitutional amendment to be approved, a double majority of voters is required, that is: a majority of voters nationally vote "YES"; and a majority of voters in a majority of the states (at least four of: NSW, Vic, Qld, WA, SA or Tas) vote "YES". Before today, did you understand this is how a national referendum works?

Base: Voters – Oct 2023 (n=922), Jun 2023 (n=1,122), Feb 2023 (n=940).

Community awareness and understanding of an Indigenous Voice to Parliament has continued to increase



Awareness of the idea of establishing an Indigenous Voice to Parliament



^{*&#}x27;Heard of it but know nothing more' in August 2022

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

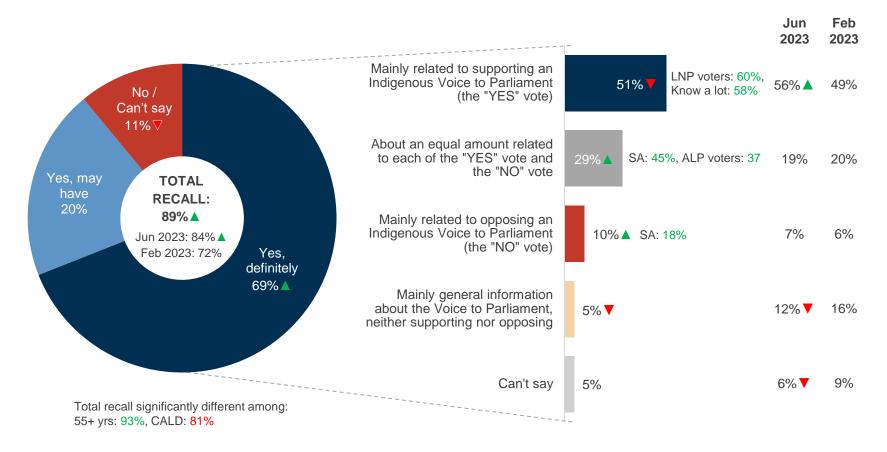
Significantly higher than the national total at the 95% confidence interval.

Q. An Indigenous Voice to Parliament is the idea of forming a body representing Aboriginal and Torres Strait Islander peoples to advise the Australian Parliament and Government on laws and policies related to Indigenous Australians. How much would you say you know and understand about this idea?

More voters recall information, media or ads about an Indigenous Voice to Parliament – still mainly the YES case



Recall and overall tone of information, ads, media stories, social media posts about proposed referendum on an Indigenous Voice to Parliament



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

Base: Voters – Oct 2023 (n=922), Jun 2023 (n=1,122), Feb 2023 (n=940), recall proposed Indigenous Voice to Parliament media – Oct 2023 (n=821), Jun 2023 (n=940), Feb 2023 (n=688).

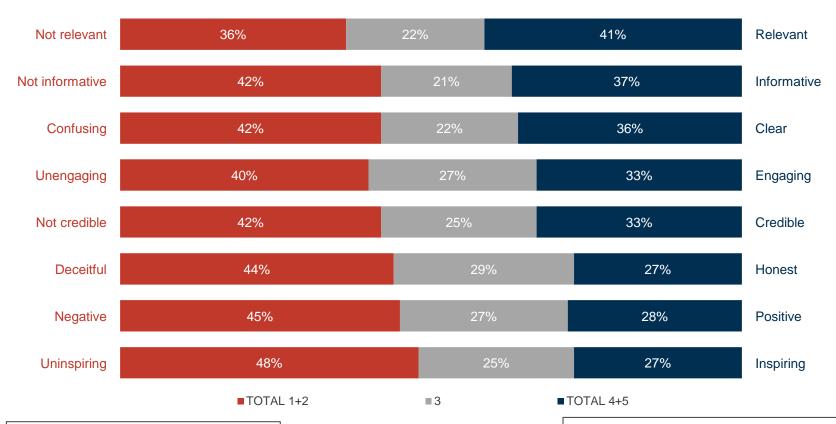
Q. Now about establishing an Indigenous Voice to Parliament. Do you recall seeing any information, advertising, media stories or social media posts recently about the proposed referendum on an Indigenous Voice to Parliament? / Q. Overall, how would you describe the information, ads, media and social media you have seen on this issue?

Voice campaign seen as relevant but uninspiring, negative, deceitful



Words or phrases describing the Voice campaign

(5-point scale)



A majority of NO voters use these negative attributes to describe the Voice campaign.

A majority of YES voters use these positive attributes to describe the Voice campaign.

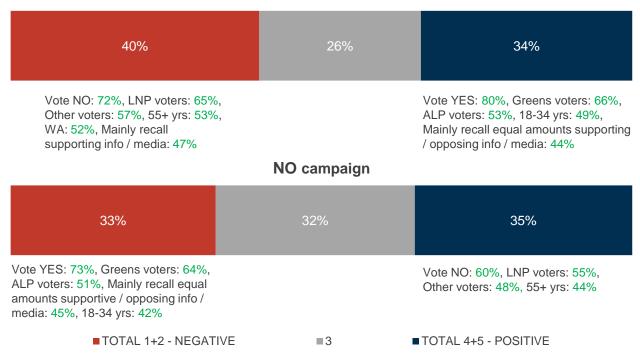
YES voters and 18-34s most positive about YES campaign, NO voters and over 55s most positive about NO campaign



Rating of YES and NO campaigns

(5-point scale)

YES campaign





Methodology

Survey methodology



National online survey of enrolled voters

n=922 Australian voters

- Conducted Friday 6th Monday 9th October 2023.
- Sample quotas on age, gender and location, with post-survey weighting to actual age / gender / location proportions from Census data.
- Maximum margin of error on n=922 is +/-3.2% at the 95% confidence level.
- Differences of +/-1% for net scores are due to rounding.



THERE ARE
OVER
17 MILLION
VOTERS
IN AUSTRALIA...

FIND OUT WHAT THEY'RE THINKING.



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