

Coronavirus National Voter Sentiment Tracker.

A detailed survey of Australian voter opinion on the Covid-19 crisis

Track 1 Results – 15 April 2020

Insightfully.

TRANSFORMING INSIGHTS INTO
ACTIONABLE STRATEGIES

The Survey.



A large-scale national survey of registered voters



n=1060 respondents for scientifically valid results



Tracked over time to see how voter sentiment shifts

n=1060 nationwide online survey of Australian registered voters, conducted 2-7 April. Results accurate to within +/-3.1% margin of error at the 95% confidence interval on total sample. Smaller sub-samples may have larger margins of error. Data weighted to ABS statistics for national representativeness.

The Questions.



Perceived threat of coronavirus



Satisfaction with response by various groups



Self-nominated priorities for governments to address coronavirus

Key Insights.

1.

Australian voters are more satisfied with the response of their governments to coronavirus than they are with the response of their fellow Australians

2.

Voters' top (unprompted) priority for governments to address in relation to coronavirus, is to continue with social distancing and lockdown

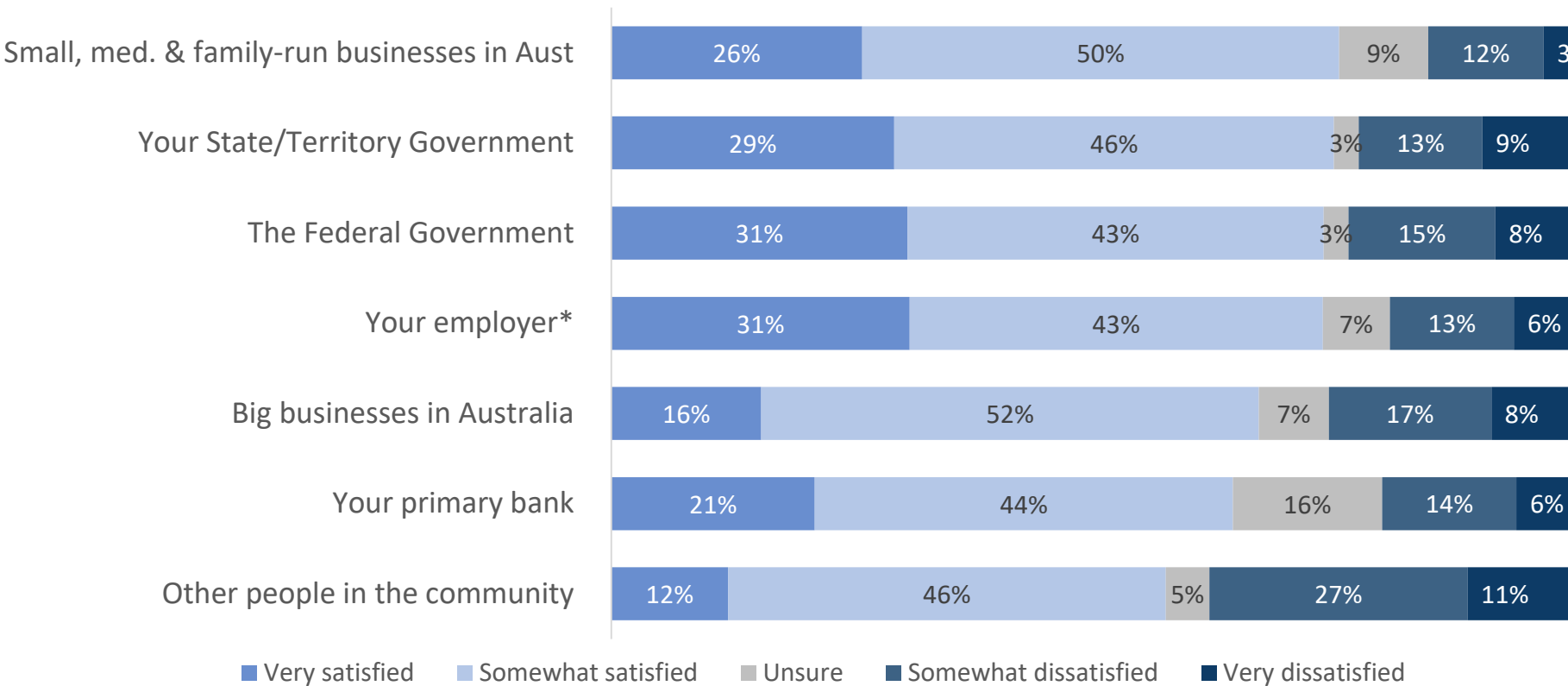
3.

Australian voters see coronavirus as a greater threat to their national and state economies over the next 12 months than to their own personal health

For additional breakdowns or insights contact leannwhite@insightfully.com.au

Australian voters are satisfied with the response of governments to coronavirus.

Satisfaction with the response of groups to coronavirus



Sorted by Total Satisfied: % very satisfied + % somewhat satisfied

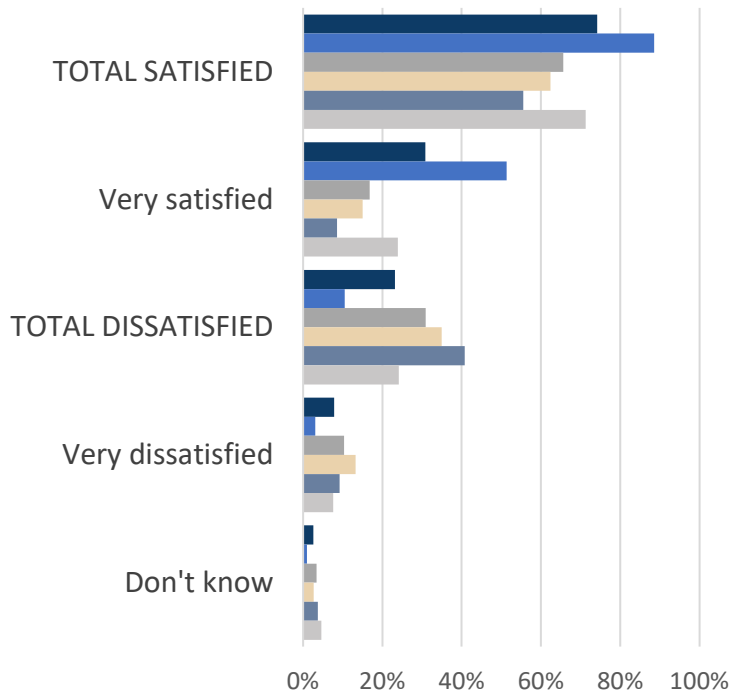
How satisfied are you with the response to the Coronavirus crisis by each of the following groups? *Asked of employees only

- 75% of Australian voters are satisfied with the response of their state or territory government to coronavirus
- 74% of voters are satisfied with the response of the Morrison federal government
- **Voters are least satisfied with the response of 'other people in the community', with 58% satisfied, but only 12% very satisfied**
- While voters are generally satisfied with the response of big business in Australia (67%), this satisfaction is weak, with only 16% very satisfied
- **Big businesses must continue to engage with Australians – and their customers – throughout the crisis**
- By contrast, satisfaction with the response of SMEs is high, at 76%

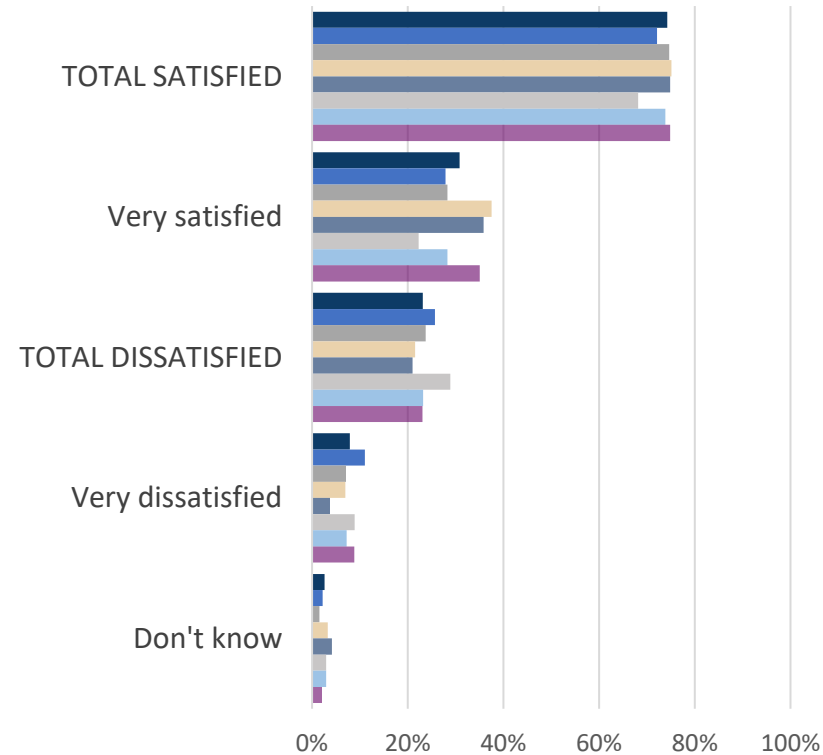
Satisfaction with the Federal Government is highest among Liberal-National voters.

Satisfaction with the response of the Federal Government

By Vote



By Location



■ Total
■ Labor voters
■ Greens voters

■ Liberal-National voters
■ Total Other voters
■ Soft voters

■ Total
■ NSW
■ VIC
■ QLD
■ WA
■ SA/Tas/NT/ACT
■ Metro
■ Regional

Sorted by Total Satisfied: % very satisfied + % somewhat satisfied

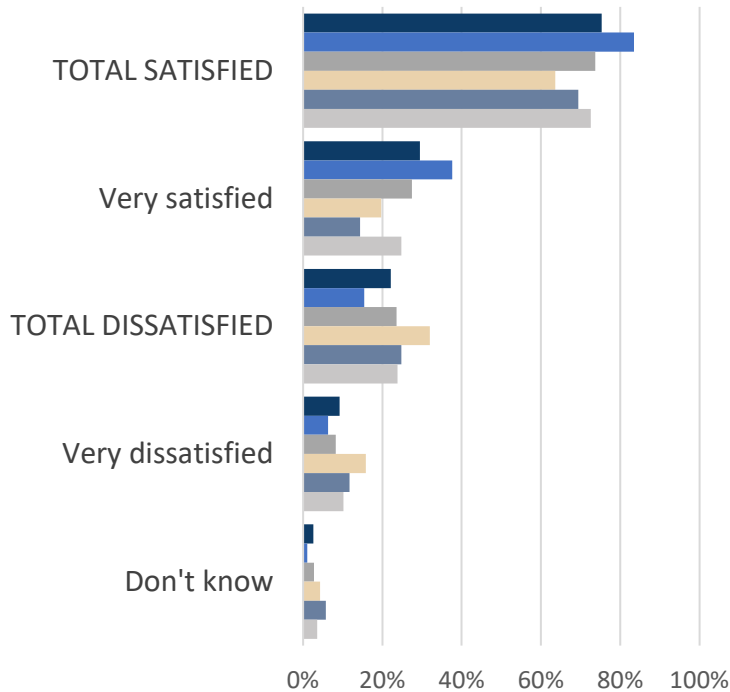
How satisfied are you with the response to the coronavirus crisis by each of the following groups?

- Liberal-National Party voters are more satisfied with the response of the Federal Government (89%) than Labor voters (66%)
- In fact, more than half of Liberal-National voters (51%) are very satisfied with the Government's response
- Greens voters are least satisfied with the response of the Federal Government (56%)
- Minor party and independent voters also exhibit a higher level of dissatisfaction with the Government's response, though only 13% are very dissatisfied
- Encouragingly for the Morrison Government, soft voters are satisfied with their response (71%)
- Voters from the smaller states are most dissatisfied with the Federal Government's response (29%)

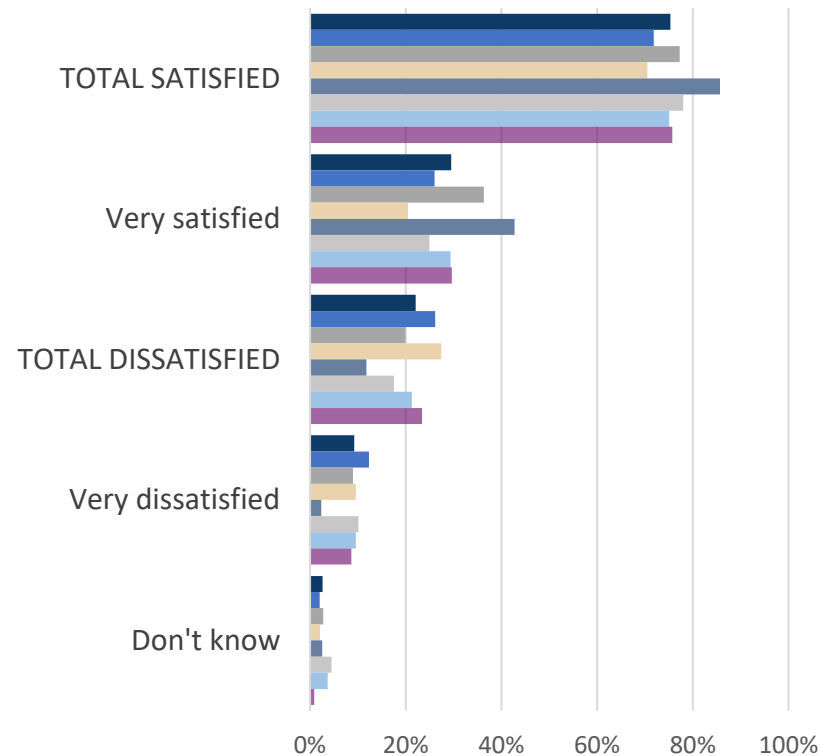
Queensland voters are least satisfied with the response of their state government.

Satisfaction with the response of the State Governments

By Vote



By Location



■ Total
■ Liberal-National voters
■ Labor voters
■ Greens voters
■ Total Other voters
■ Soft voters

■ Total
■ NSW
■ VIC
■ QLD
■ WA
■ SA/Tas/NT/ACT
■ Metro
■ Regional

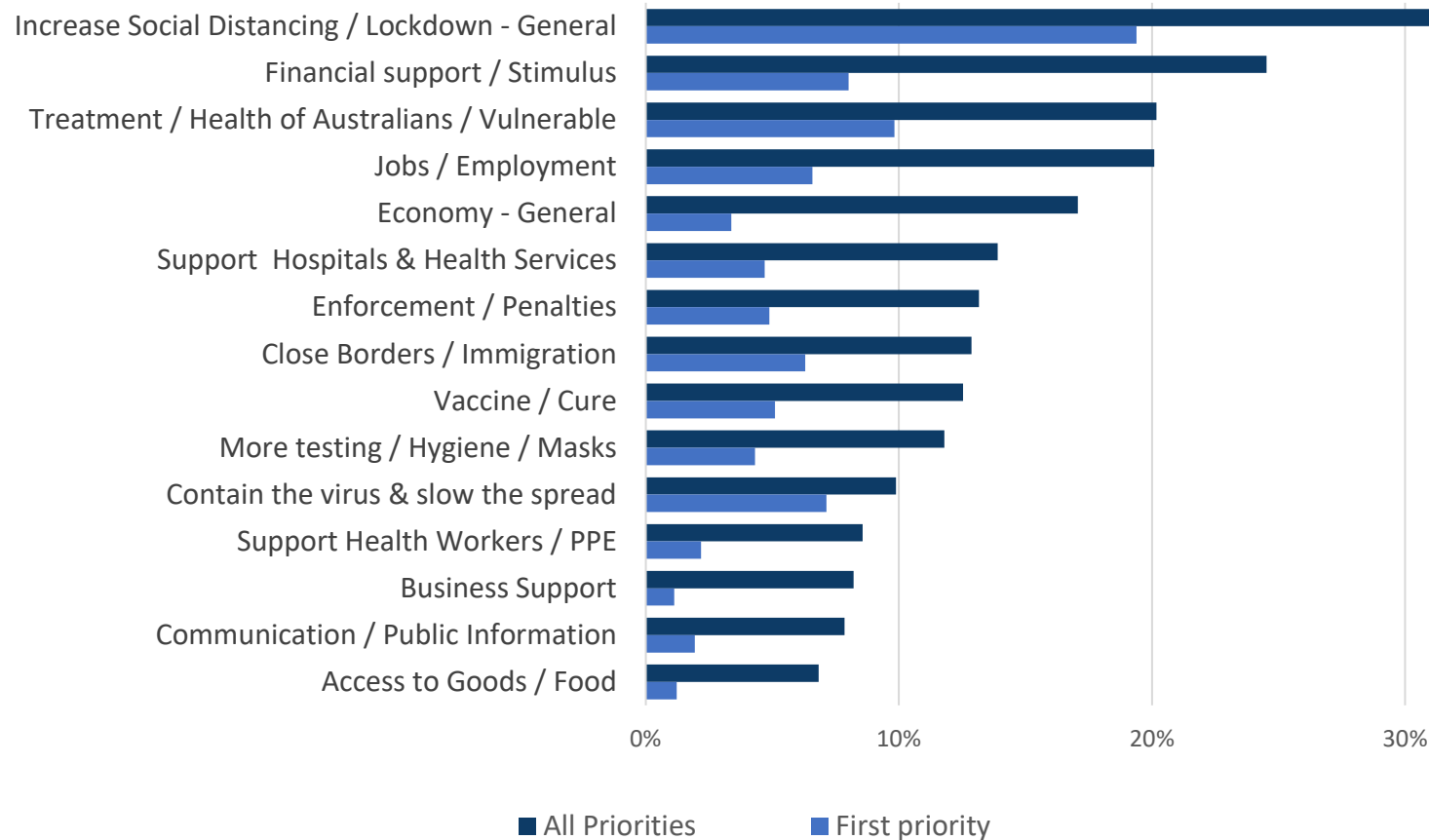
Sorted by Total Satisfied: % very satisfied + % somewhat satisfied

How satisfied are you with the response to the coronavirus crisis by each of the following groups?

- Liberal-National voters are most satisfied with the response of their state governments (83%), with 38% very satisfied
- WA voters are most strongly satisfied with the response of their state Government, with 43% very satisfied
- Strong satisfaction with state government is weakest for Queensland, where only 20% are very satisfied
- More than a quarter (27%) of Queensland voters are dissatisfied with the response of their state government
- This will be a concern to the Queensland Palaszczuk Labor Government as it edges nearer to a state election in October this year

Social distancing is the top priority Aust voters want governments to focus on.

Government priorities (unprompted)



Sorted by All Priorities

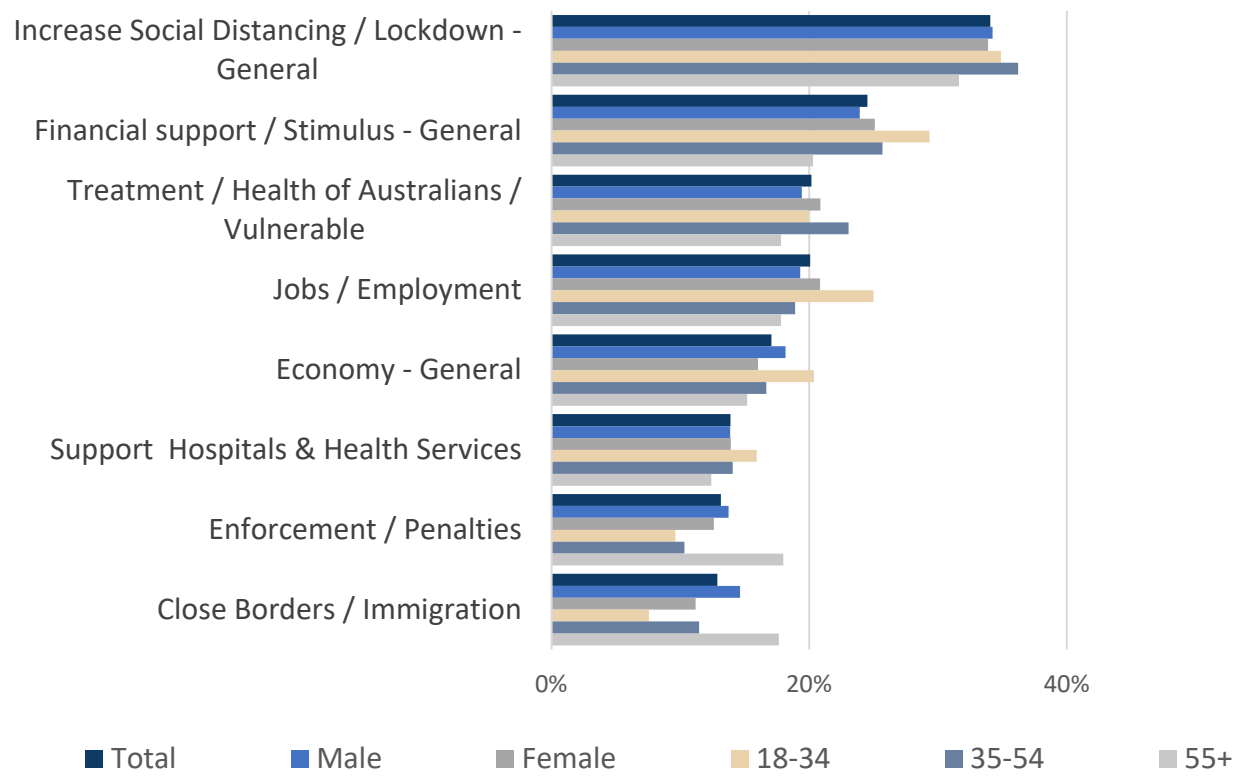
What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

N.B. Priorities <7% not shown

- Governments across Australia have been vindicated in their moves to keep people at home: The top (unprompted) priority voters want governments to be focused on now in response to coronavirus is social distancing or locking communities down (34%)
- 13% of respondents say they want governments to focus on enforcement of the new rules and penalising wrongdoers
- The second-highest priority for Australian voters is financial support (25%), followed by treatment of Australians (20%) and employment (20%)

Views of government priorities vary by age.

Government priorities
By Demographics (1/2)



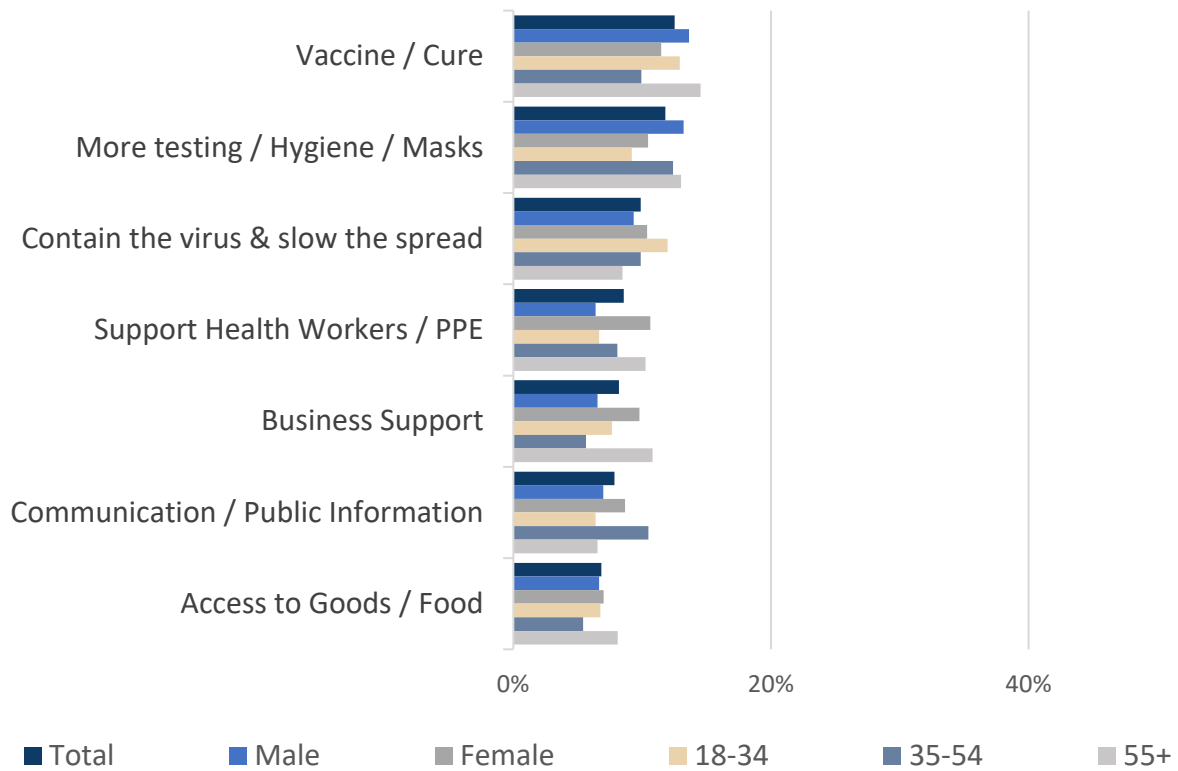
- Younger voters (18-34 years) are more likely than other voters to want government to focus on financial support (29%) and jobs (25%)
- Older voters are more likely than other voters to want social distancing to be enforced (18%), and for national borders to be closed (18%)

Sorted by All Priorities

What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

Views of government priorities vary by age.

Government priorities
By Demographics (2/2)

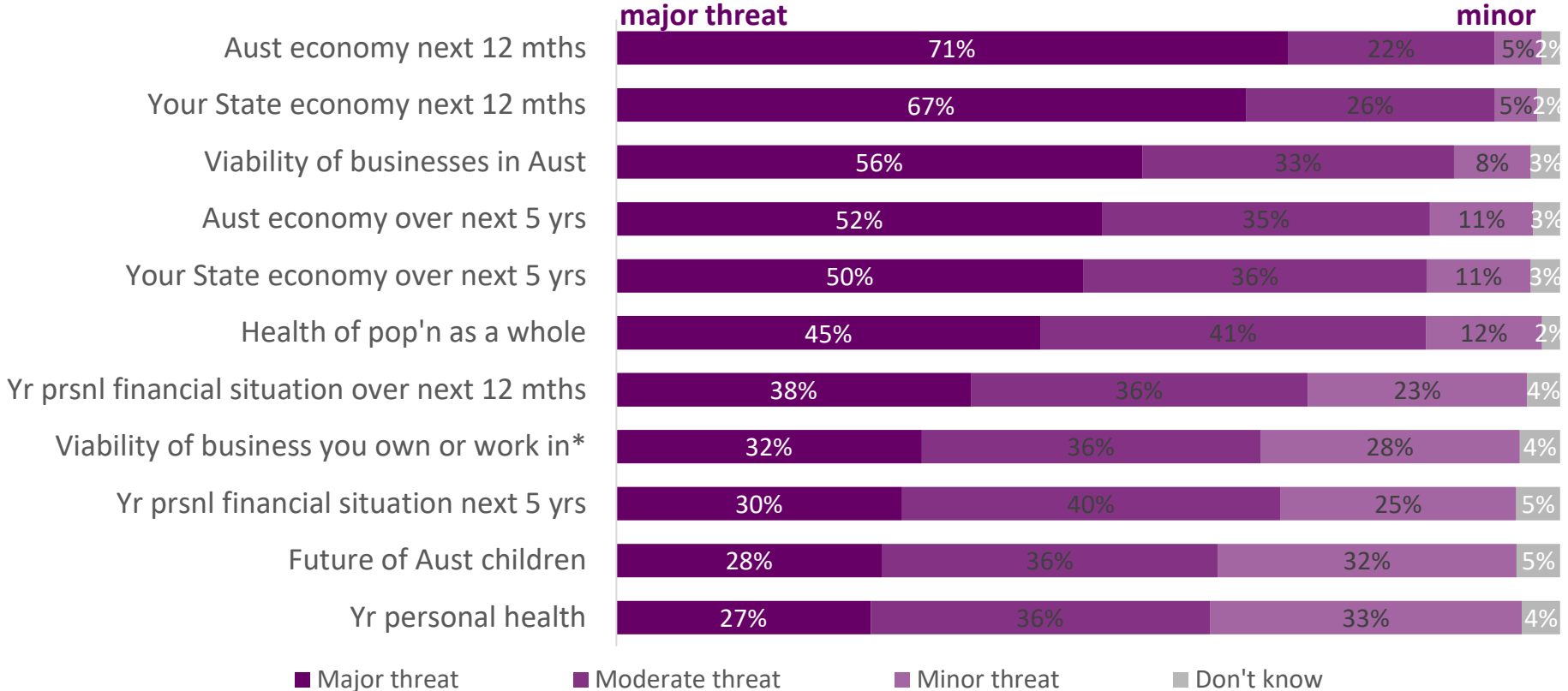


Sorted by All Priorities

What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

Voters see coronavirus as a major threat to the Australian economy in the next year.

Threat posed by coronavirus



- Australian voters are gravely concerned about the level of threat the coronavirus poses to the Australian economy over the next 12 months, with 71% saying it poses a major threat
- Although voters' top unprompted priority is social distancing and lockdown, less than half (45%) perceive coronavirus to be a major threat to the population's health, and only 27% perceive it to be a major threat to their own personal health

Sorted by Major Threat

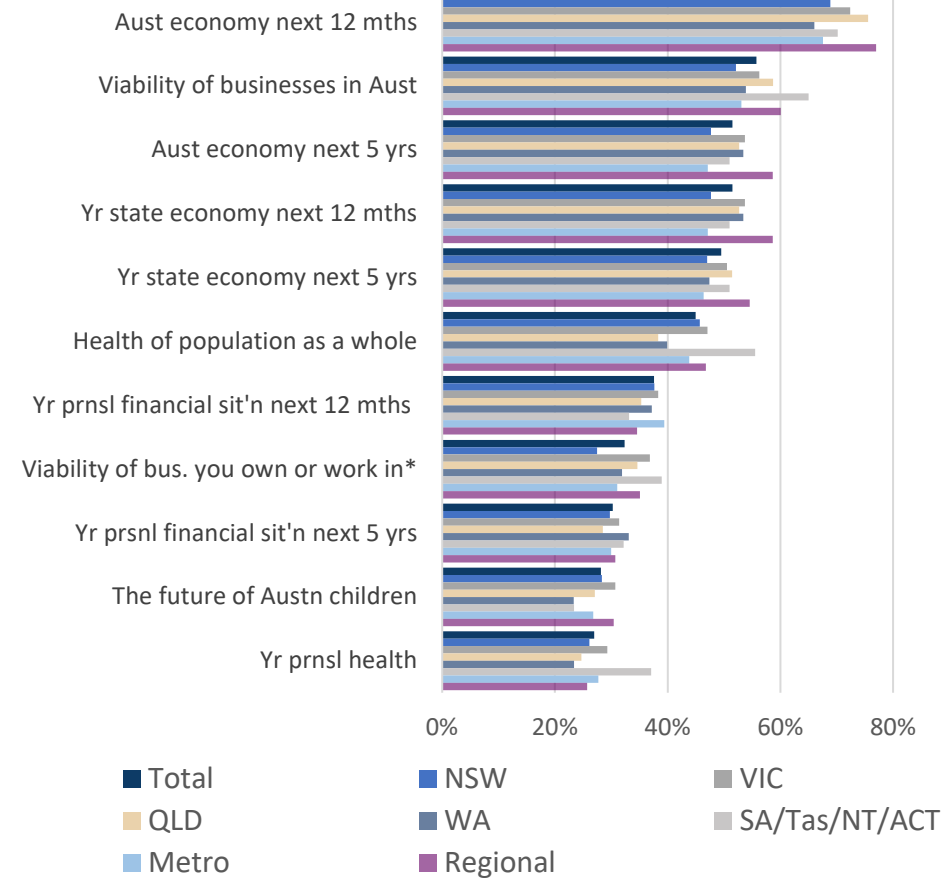
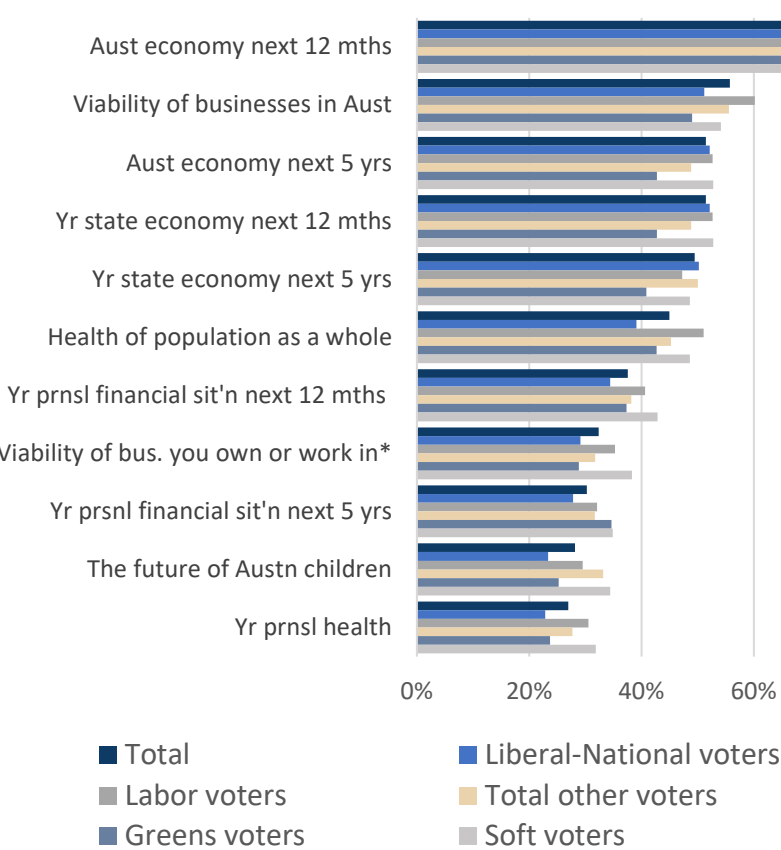
What level of threat do you think the coronavirus crisis poses to each of the following? *Asked of employees only

Regional voters see coronavirus as more of a threat generally.

Coronavirus poses a major threat

By Vote

By Location



- Soft voters are the voter group who are most concerned about the threat coronavirus poses to the business they own or work in (38% say it poses a major threat)
- Regional voters generally see coronavirus as more of a threat than those in metropolitan areas.
- 77% of regional voters say coronavirus poses a major threat to the Aust economy over the next 12 months; 68% of metropolitan voters see it as a major threat

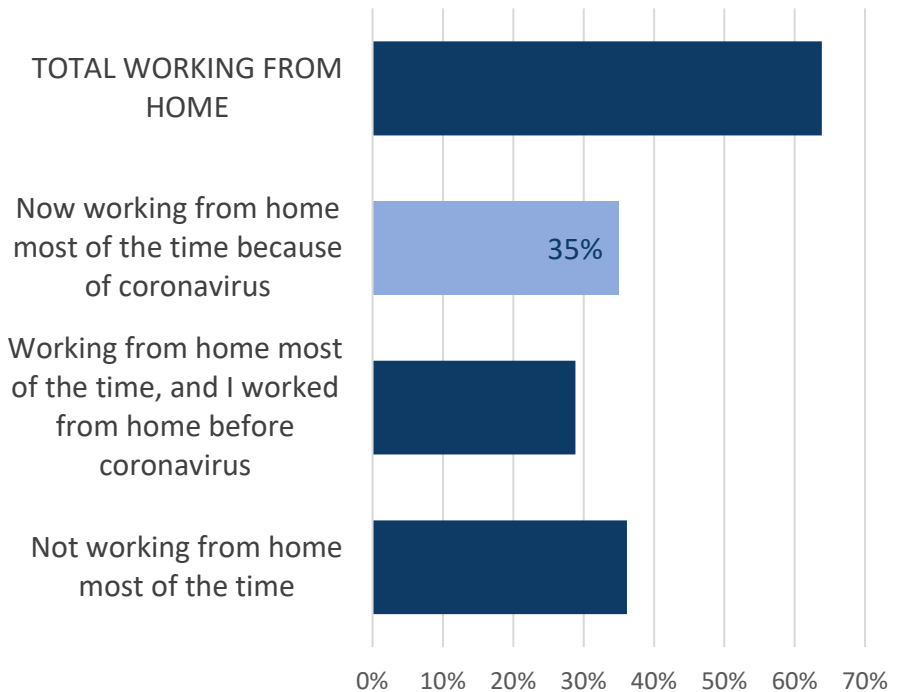
Major Threat Shown

What level of threat do you think the coronavirus crisis poses to each of the following? *Asked of employees only

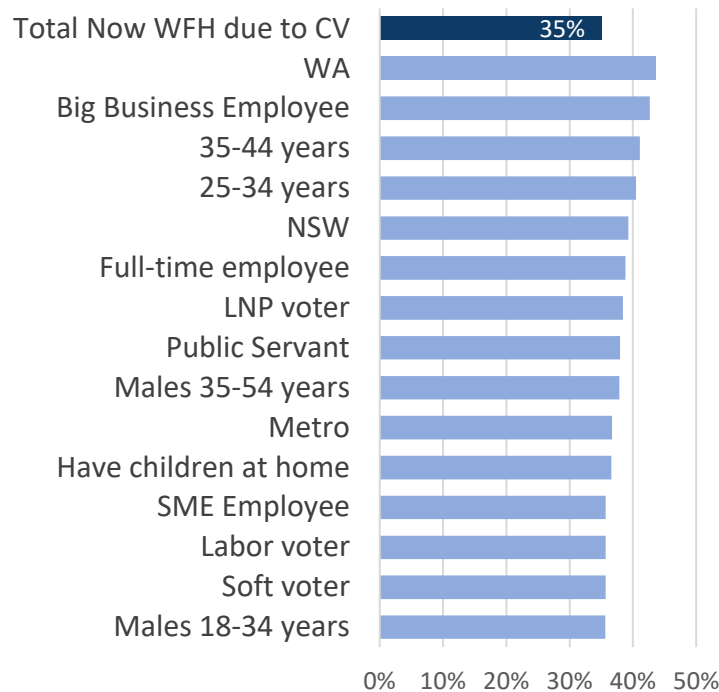
A third of working Australians are working from home because of coronavirus.

Working from home status

WFH Status: All employees



WFH due to CV: Groups most impacted



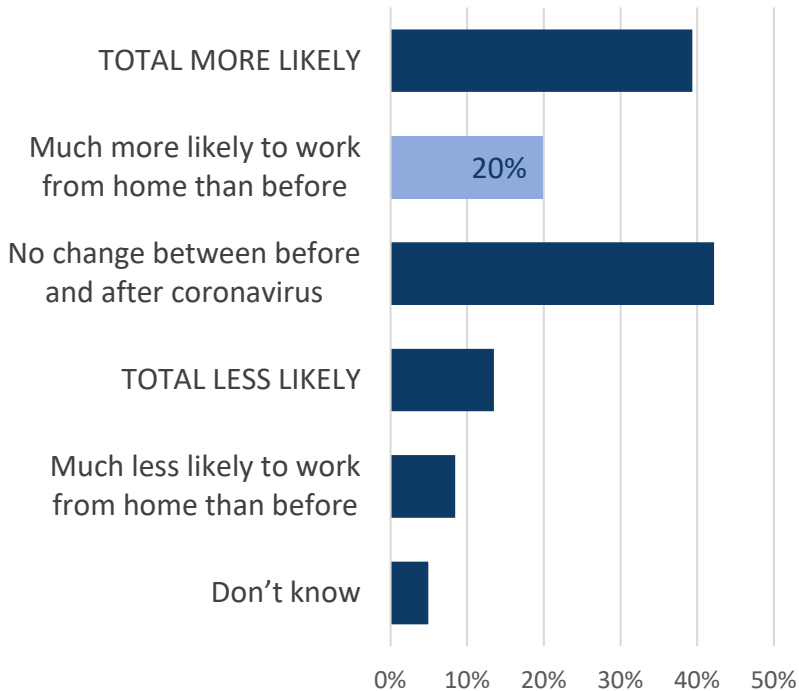
- The coronavirus crisis has had a significant impact on employees, 35% of whom are now working from home **because of coronavirus**
- WA and NSW are the states where most workers have transitioned to working from home due to coronavirus
- Employees working for big businesses and organisations are also more likely to have moved to work-from-home arrangements

With the changes in work arrangements due to coronavirus, which of the following best describes your current work situation?
This question asked of employees only

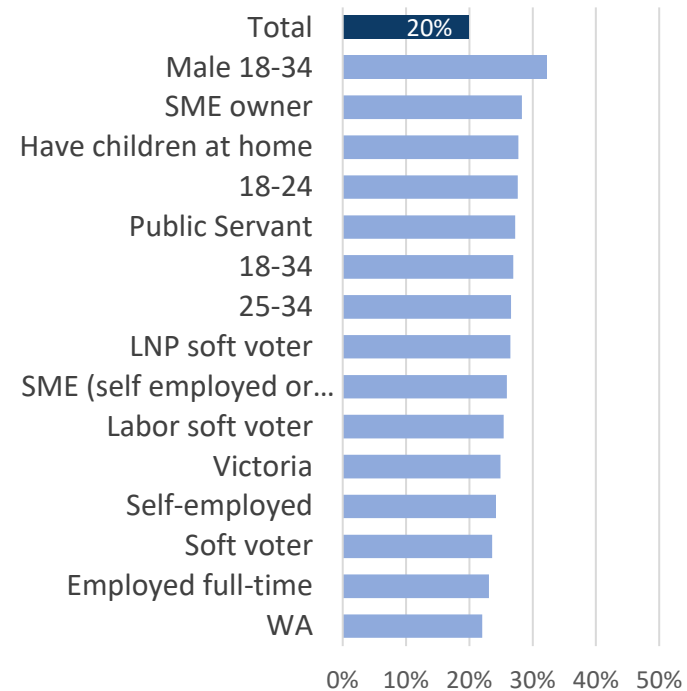
Australian workers expect CV to change work-from-home arrangements long-term.

Likelihood to work-from-home after coronavirus

Likelihood to WFH after CV: All employees



Much more likely to WFH after CV: Groups most likely



- Many working voters expect the coronavirus to have a long-term impact on where they work
- 39% of working voters expect they will be more likely to work from home once the impact of the coronavirus crisis is over
- A fifth (20%) of working voters think they will be **much** more likely to work from home after coronavirus
- Young men (18-34 years) are most likely to expect a change in their work-from-home status in the long term, along with SME owners and those who have children at home

When the impact of coronavirus is over, do you think you will be more likely or less likely to work from home than before coronavirus, or will there be no change? *This question asked of employees only*

Additional breakdowns.

By vote, location, demographics and employment status

The logo graphic for Insightfully consists of several overlapping, semi-transparent grey chevron shapes pointing to the right, arranged in a cluster behind the company name.

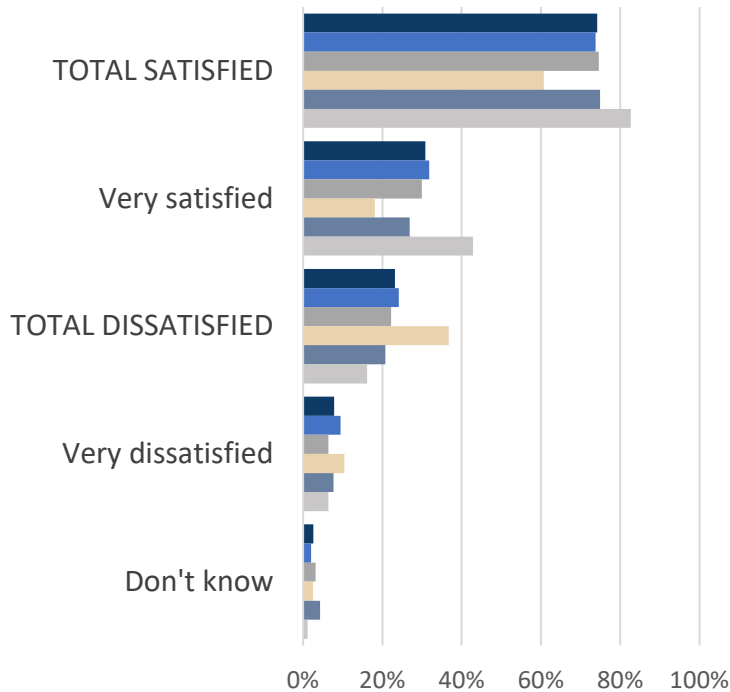
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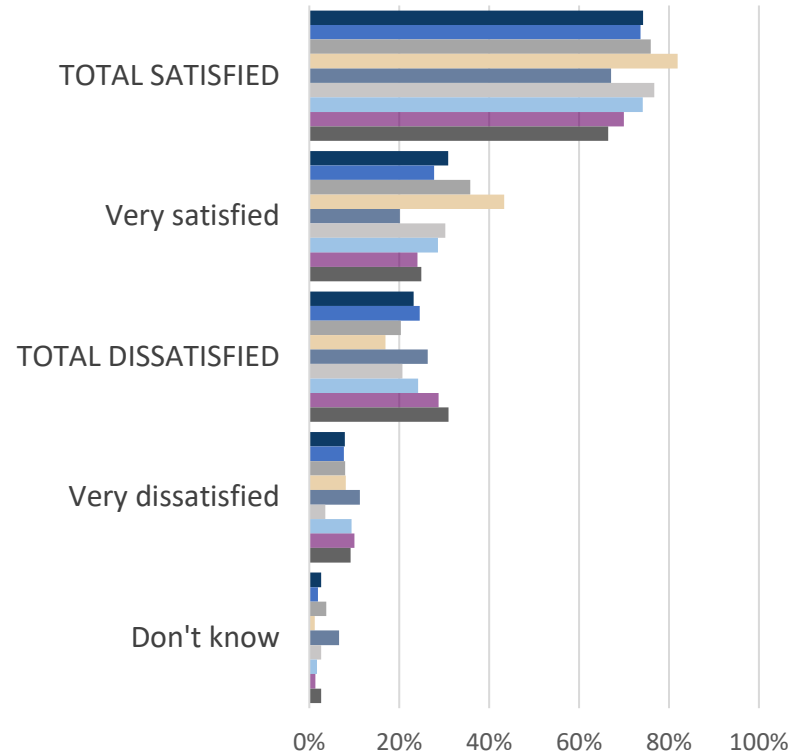
Retirees most satisfied with Federal Government's response.

Satisfaction with the response of the Federal Government

By Demographics



By Employment



- Total
- Male
- Female
- 18-34
- 35-54
- 55+
- Retiree
- Unemployed
- SME Employee
- Employed
- Not employed (Net)
- Big Business Employee
- Public Servants
- SME owner

Sorted by Total Satisfied: % very satisfied + % somewhat satisfied

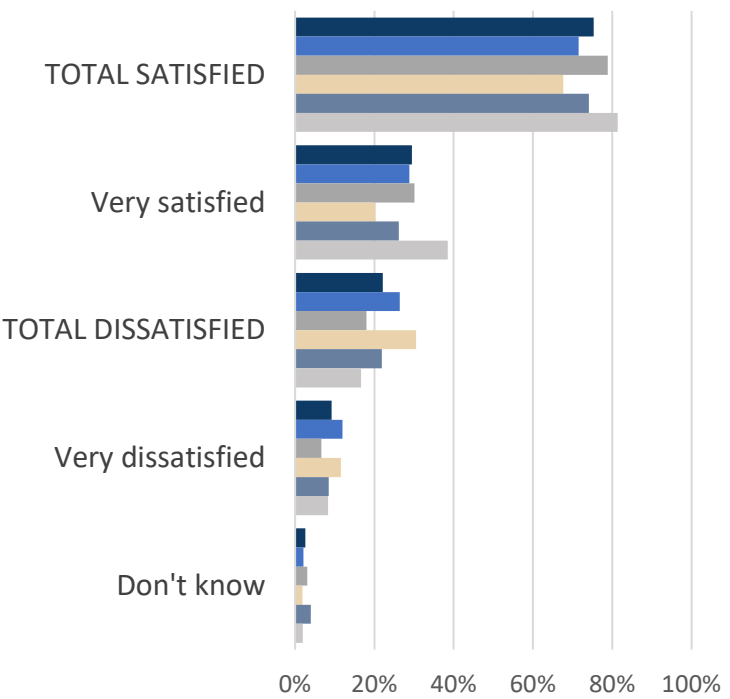
How satisfied are you with the response to the coronavirus crisis by each of the following groups?

- Voters over 55 years (43%) and retirees (43%) – groups among whom there is considerable overlap - are most likely to be very satisfied with the Federal Government's response to coronavirus

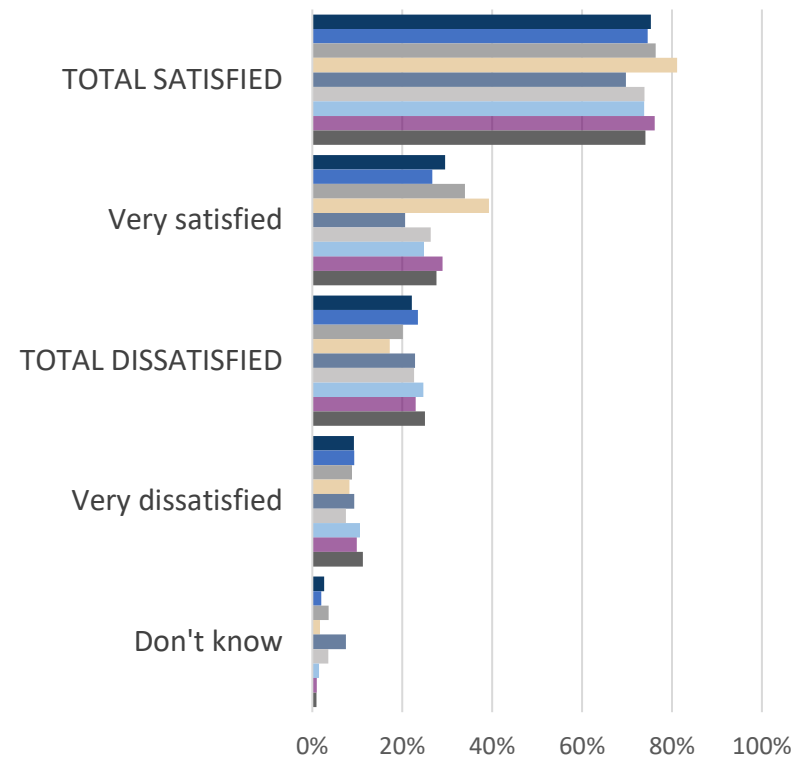
Older voters and retirees are more satisfied with state governments.

Satisfaction with the response of the State Governments

By Demographics



By Employment



- Total
- Male
- Female
- 18-34
- 35-54
- 55+
- Retiree
- Employed
- Unemployed
- SME Employee
- Big Business Employee
- Public Servants
- Not employed (Net)
- SME owner

Sorted by Total Satisfied: % very satisfied + % somewhat satisfied

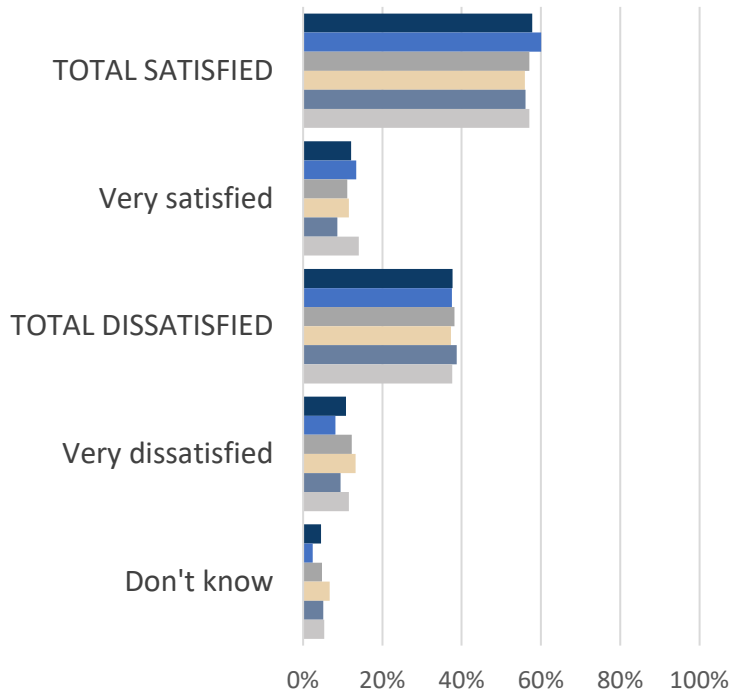
How satisfied are you with the response to the coronavirus crisis by each of the following groups?

- Older voters over 55 years (39%) and retirees (39%) are more likely to be 'very satisfied' with the response of the state governments
- Nearly a third (31%) of younger voters (18-34 years) are dissatisfied with the response of their state governments

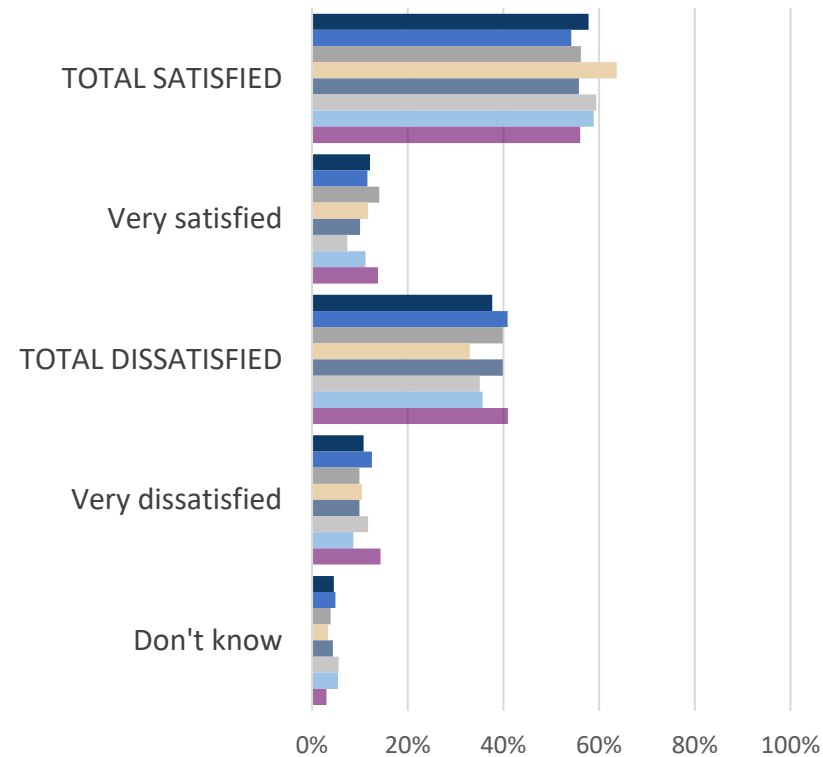
NSW voters are most dissatisfied with the response of others in the community.

Satisfaction with the response of others in the community

By Vote



By Location



■ Total
■ Labor voters
■ Greens voters

■ Liberal-National voters
■ Total Other Voters
■ Soft voters

■ Total
■ VIC
■ WA
■ Metro
■ NSW
■ QLD
■ SA/Tas/NT/ACT
■ Regional

Sorted by Total Satisfied: % very satisfied + % somewhat satisfied

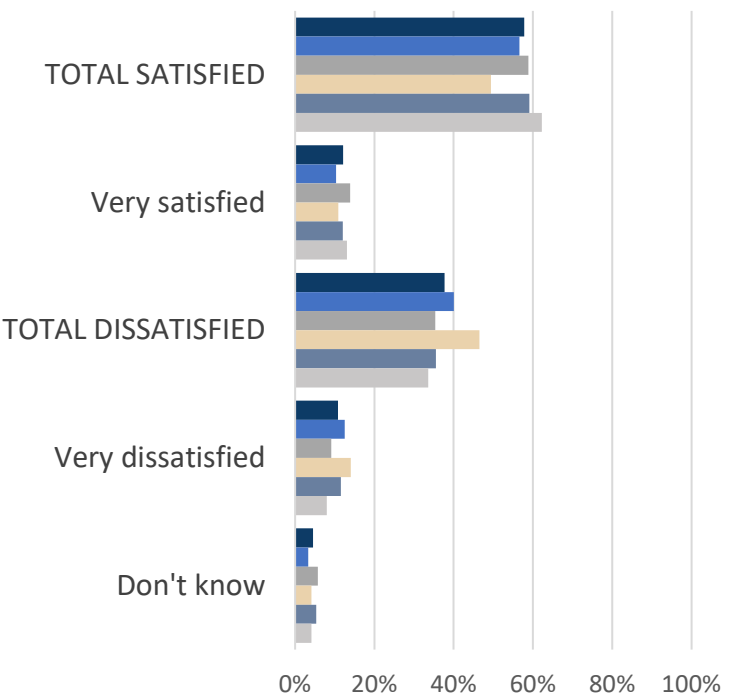
How satisfied are you with the response to the coronavirus crisis by each of the following groups?

- 41% of NSW voters say they are dissatisfied with the response of their fellow community members to the coronavirus

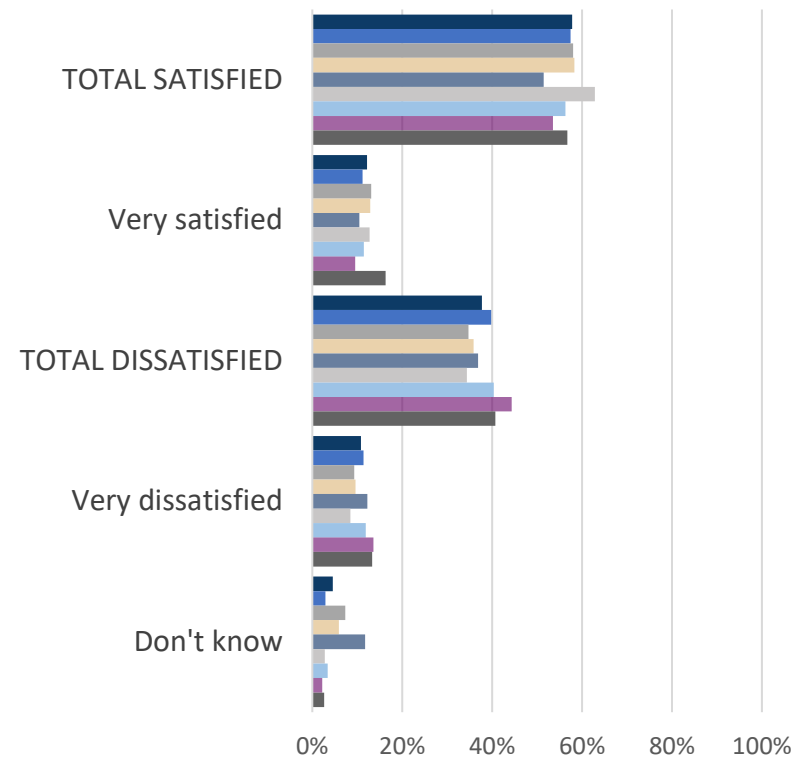
Big business workers are most dissatisfied with the response of other people.

Satisfaction with the response of others in the community

By Demographics



By Employment



- Total
- Male
- Female
- 18-34
- 35-54
- 55+
- Retiree
- SME Employee
- Employed
- Unemployed
- Not employed (Net)
- SME owner
- Big Business Employee
- Public Servant

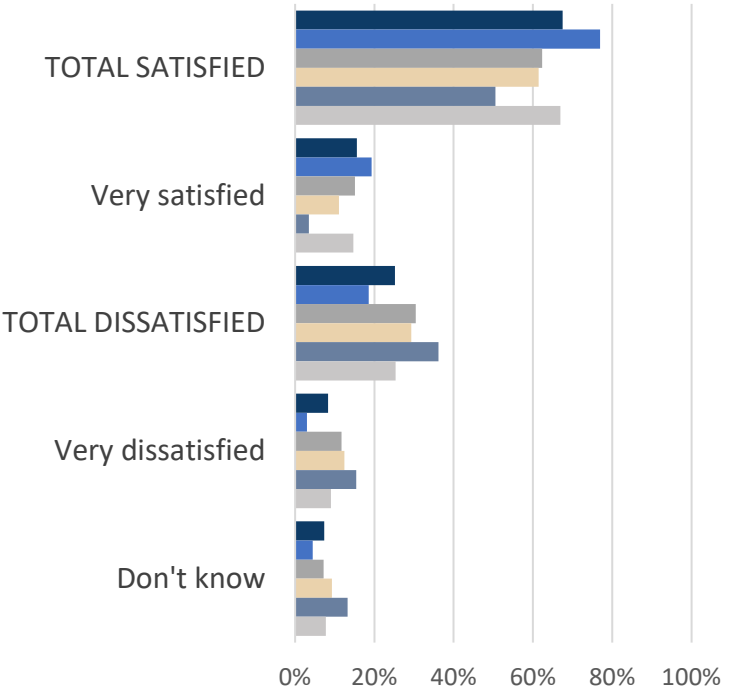
Sorted by Total Satisfied: % very satisfied + % somewhat satisfied
 How satisfied are you with the response to the Coronavirus crisis by each of the following groups?

- Working voters who are employed by a big business (with 200 or more employees) are the most dissatisfied (44%) of the various employment groups with the response of other people in the community

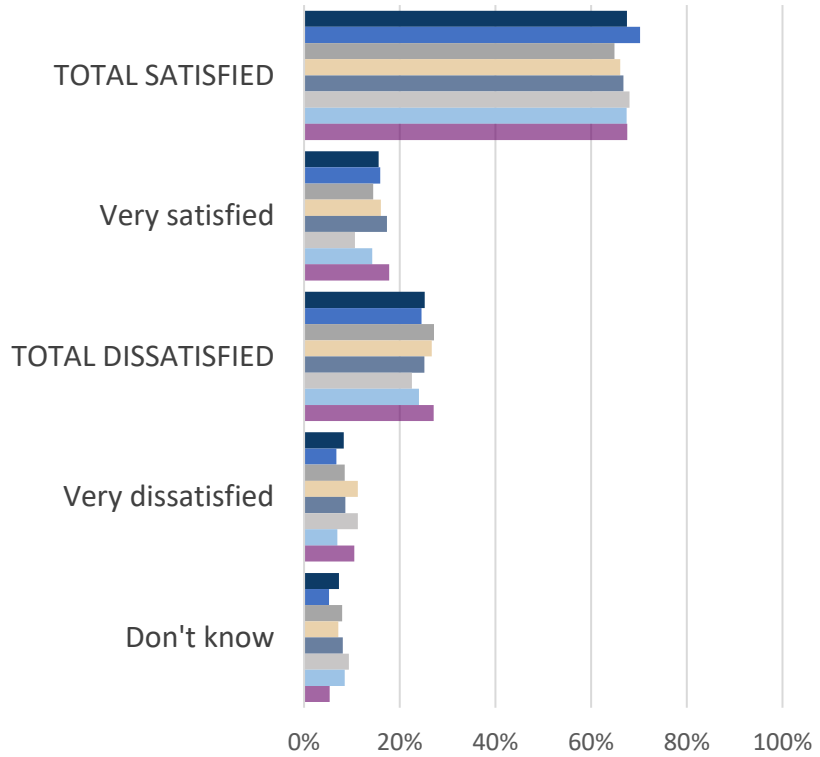
Greens voters are most dissatisfied with the response of big business.

Satisfaction with the response of Australian big businesses

By Vote



By Location



- Greens supporters are the voter group most dissatisfied with the response of big business (36%)

Total
 Labor voters
 Greens voters
 Liberal-National voters
 Total Other voters
 Soft voters

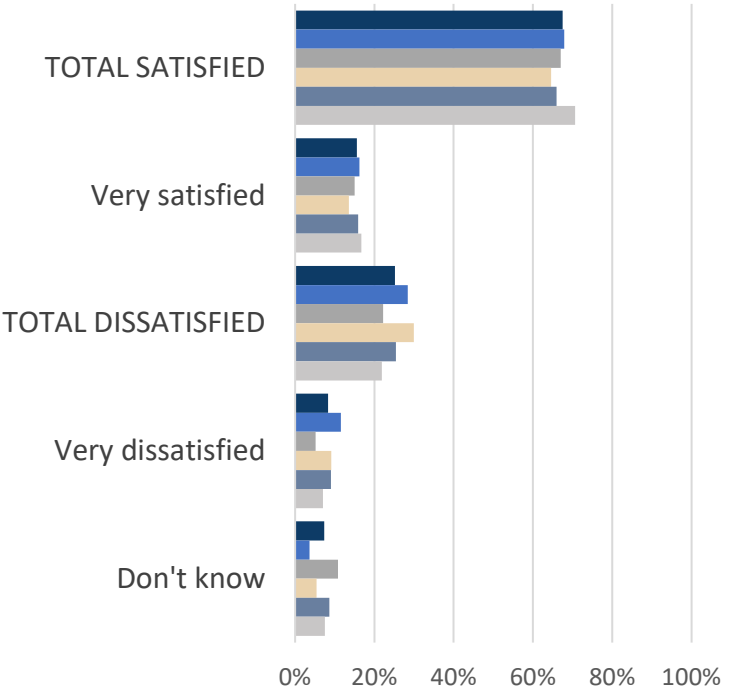
Total
 NSW
 VIC
 QLD
 WA
 SA/Tas/NT/ACT
 Metro
 Regional

Sorted by Total Satisfied: % very satisfied + % somewhat satisfied
 How satisfied are you with the response to the Coronavirus crisis by each of the following groups?

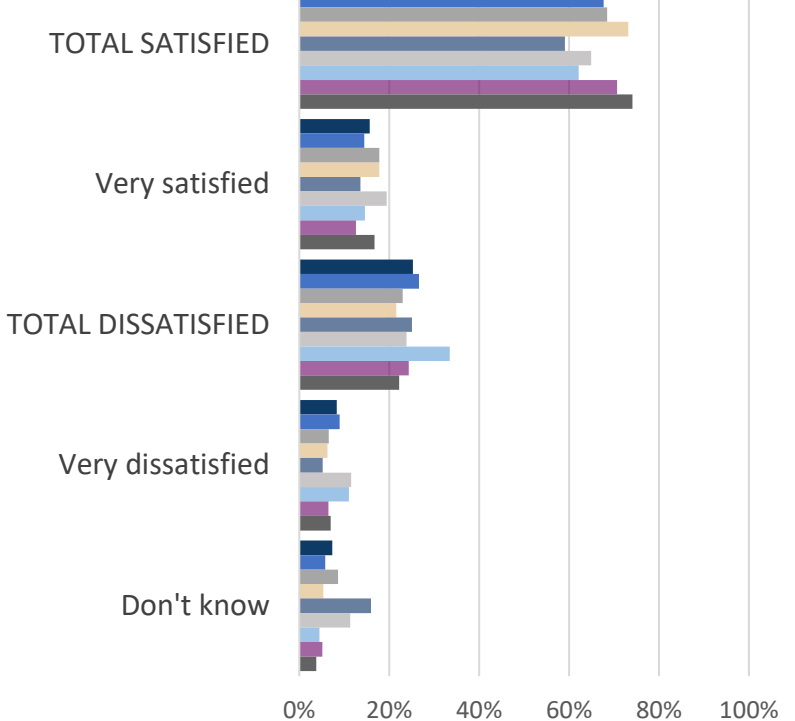
Workers in small and medium businesses are least satisfied with big business.

Satisfaction with the response of Australian big businesses

By Demographics



By Employment



- Total
- Male
- Female
- 18-34
- 35-54
- 55+
- Retiree
- SME Employee
- Employed
- Unemployed
- Not employed (Net)
- SME owner
- Big Business Employee
- Public Servants

Sorted by Total Satisfied: % very satisfied + % somewhat satisfied

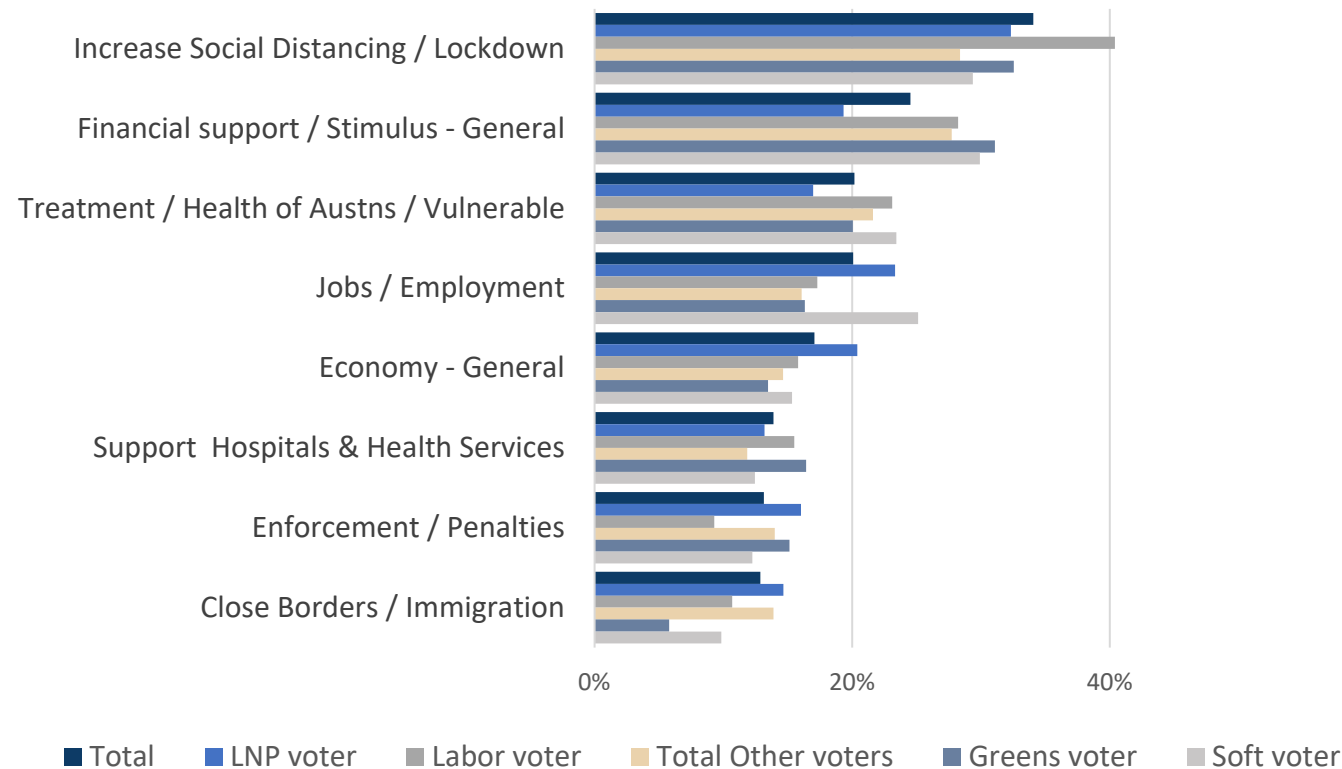
How satisfied are you with the response to the Coronavirus crisis by each of the following groups?

- The employment group most dissatisfied with the response of Australia's big businesses is people who are working for small and medium enterprises (33%), including those who might be on the JobKeeper payment

Labor voters are more focused on social distancing than other voters.

Government priorities

By Vote (1/2)



Sorted by All Priorities

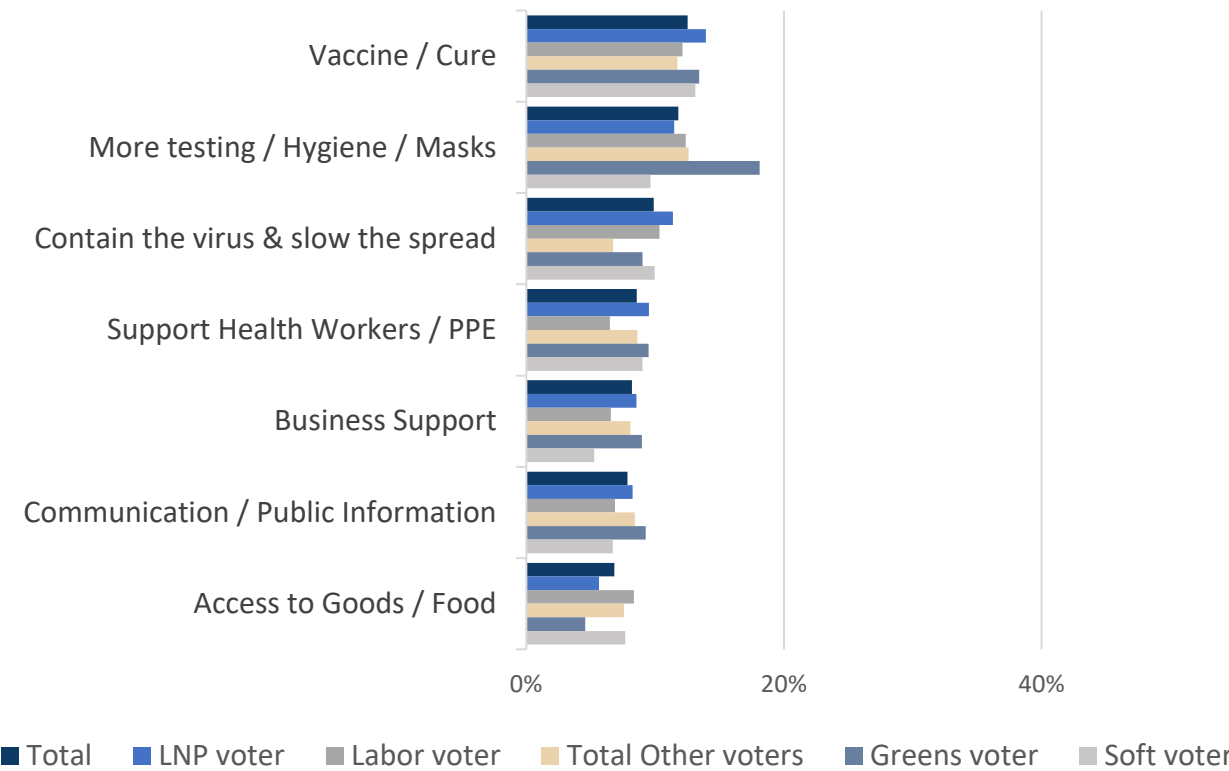
What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

- Labor voters are more likely than other voters to want government to focus on social distancing and lockdowns (40%)
- LNP voters (23%) and soft voters (25%) are more likely than other voters to want government to focus on jobs and employment

Labor voters are more focused on social distancing than other voters.

Government priorities

By Vote (2/2)



- Greens voters are more likely than other voters to want government to focus on providing more testing, better hygiene, or encouraging more community mask wearing (18%)

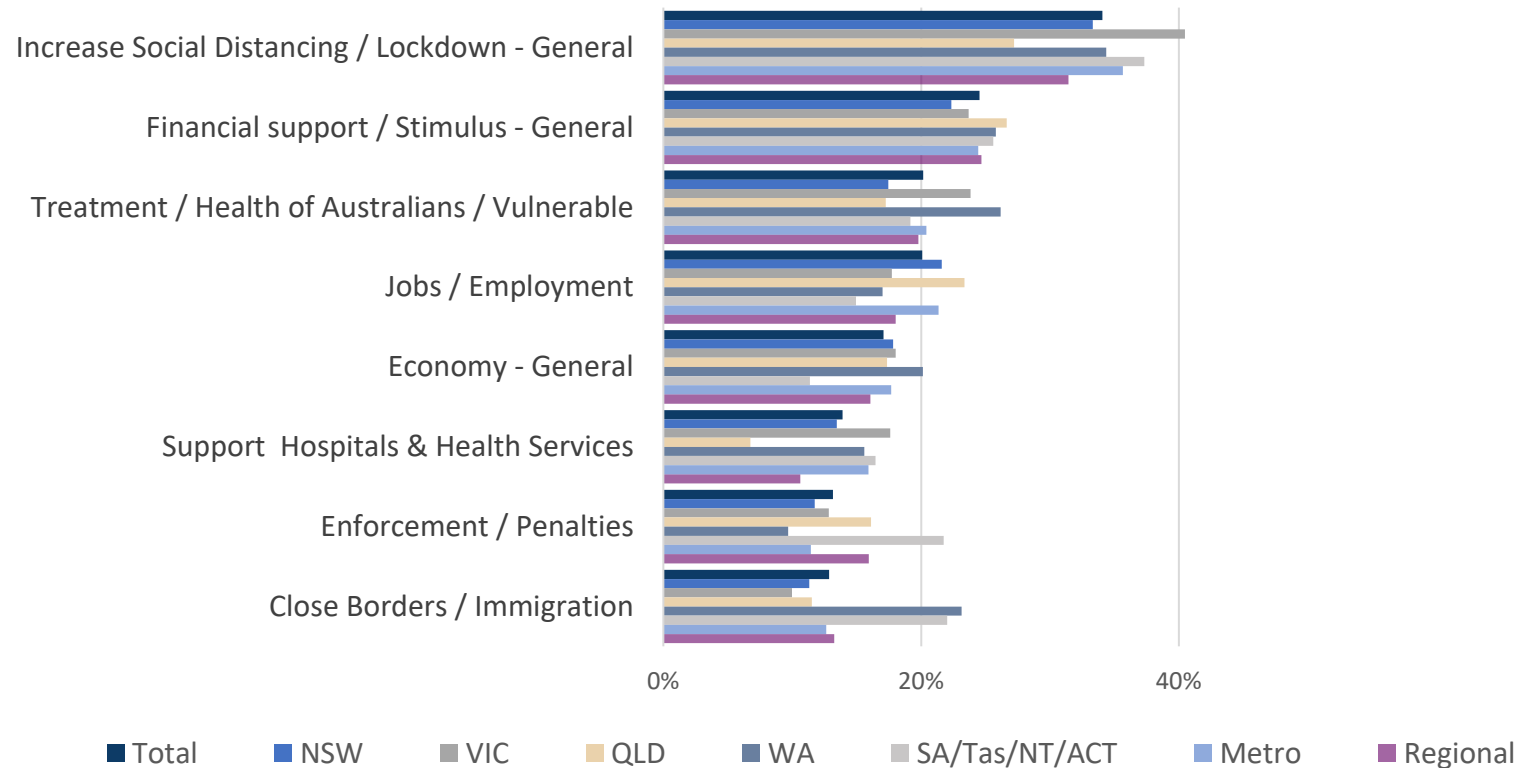
Sorted by All Priorities

What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

Priorities vary state by state.

Government priorities

By Location (1/2)



Sorted by All Priorities

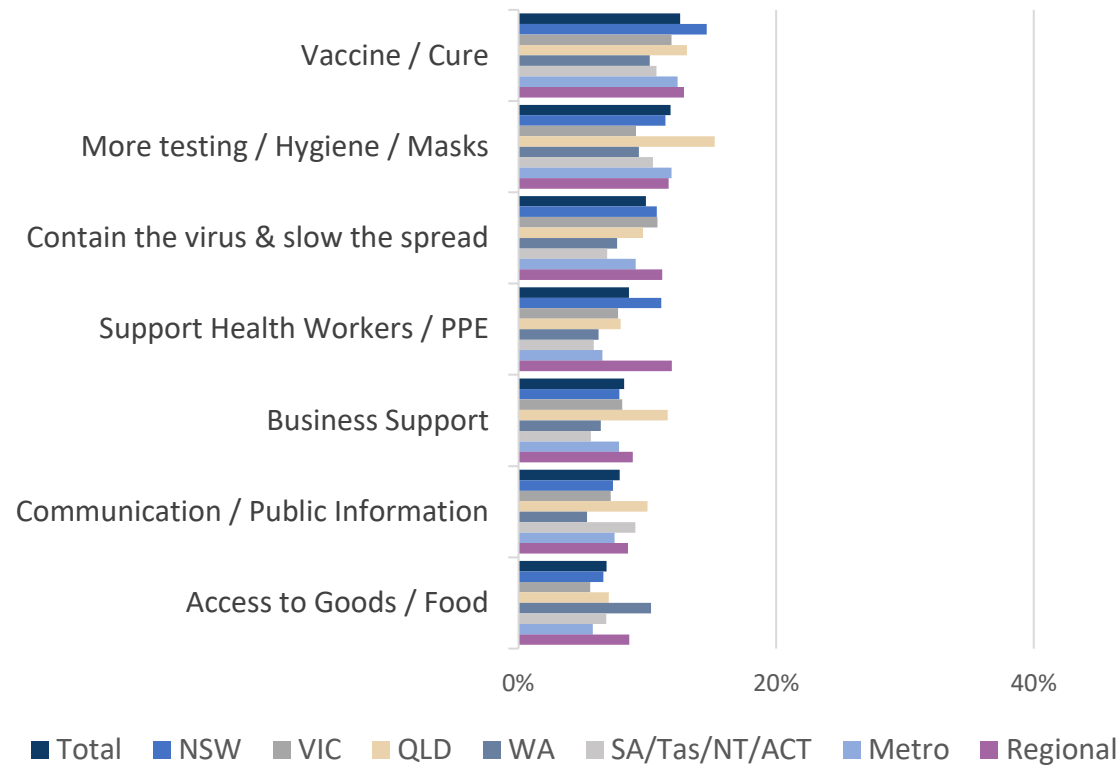
What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

- Queenslanders are less concerned about social distancing (34%) than voters in other states
- Voters in WA (23%) and the smaller states (22%) are more likely to nominate closing borders, or immigration issues, than voters in other states

Priorities vary state by state.

Government priorities

By Location (2/2)



Sorted by All Priorities

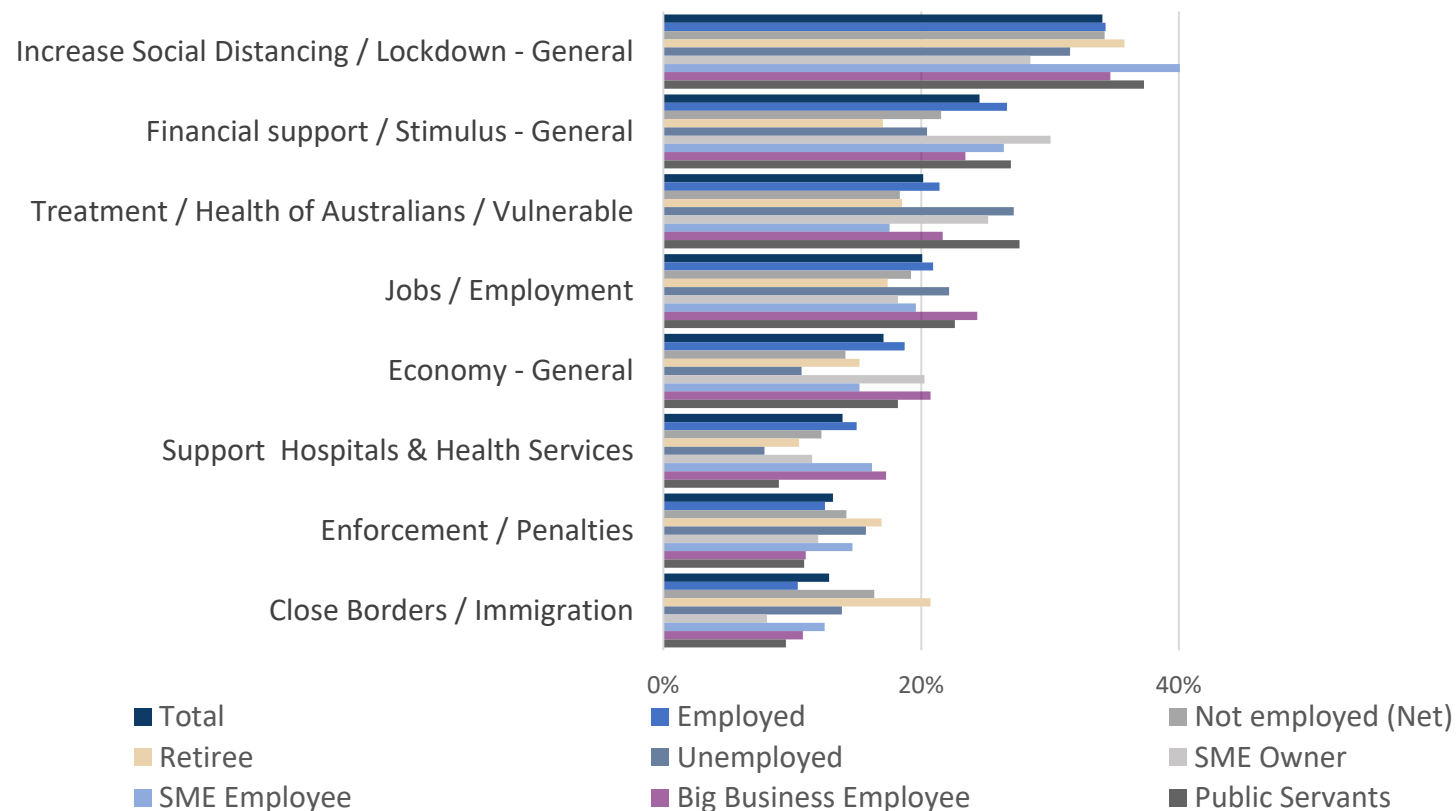
What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

- Regional voters (12%) are more likely than voters in metropolitan areas (7%) to be calling for more support for health workers, including providing them with adequate personal protective equipment

Views vary significantly by employment type: SME owners want a financial focus.

Government priorities

By Employment (1/2)



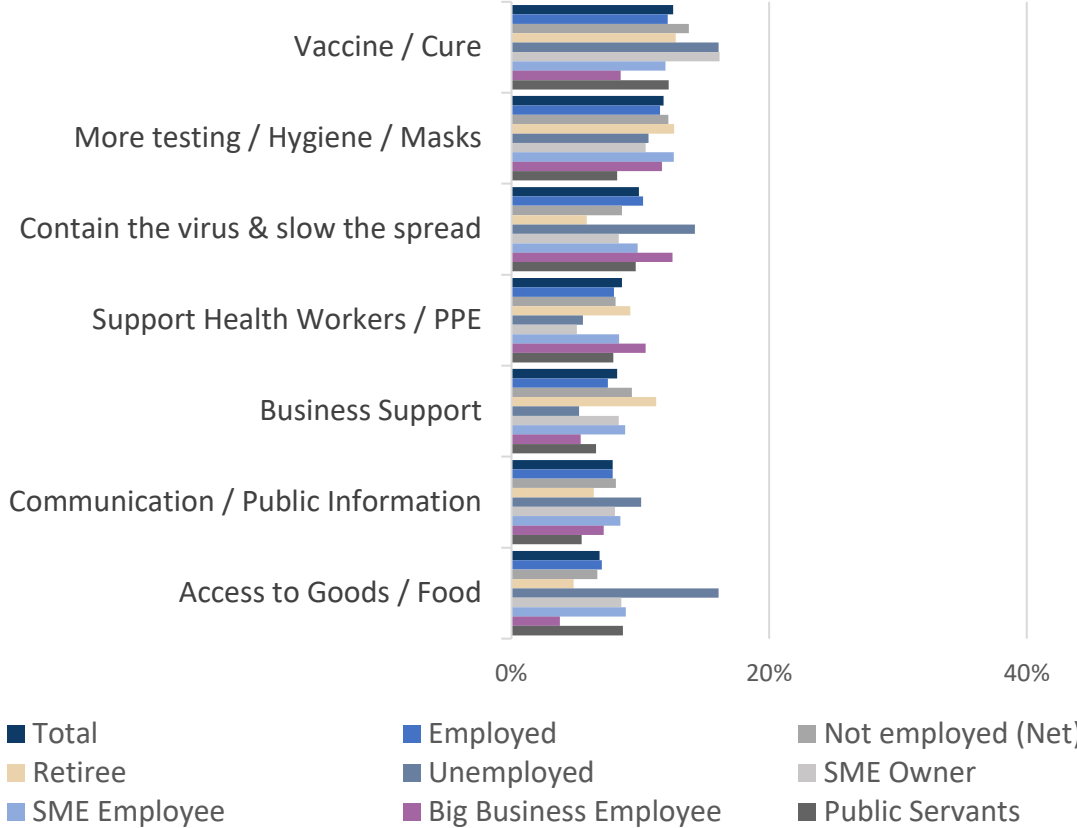
Sorted by All Priorities

What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

- Voters running their own businesses are more likely to want governments to focus on the provision of financial support and stimulus (30%)
- Unemployed voters are less likely to want government to focus on the economy (20%) and more likely to want government to focus on the treatment of Australians, especially the vulnerable (27%)

Views vary significantly by employment type.

Government priorities
By Employment (2/2)



- The unemployed are also much more likely to want governments to ensure access to essential items and food (16%)

Sorted by All Priorities

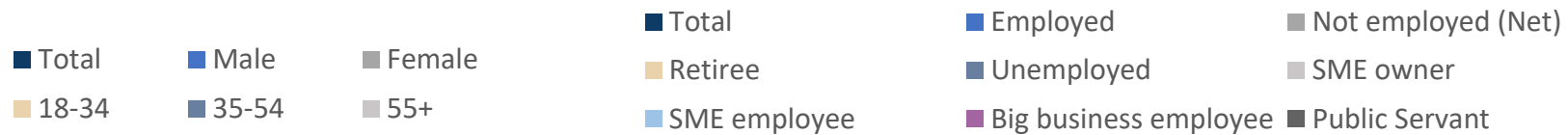
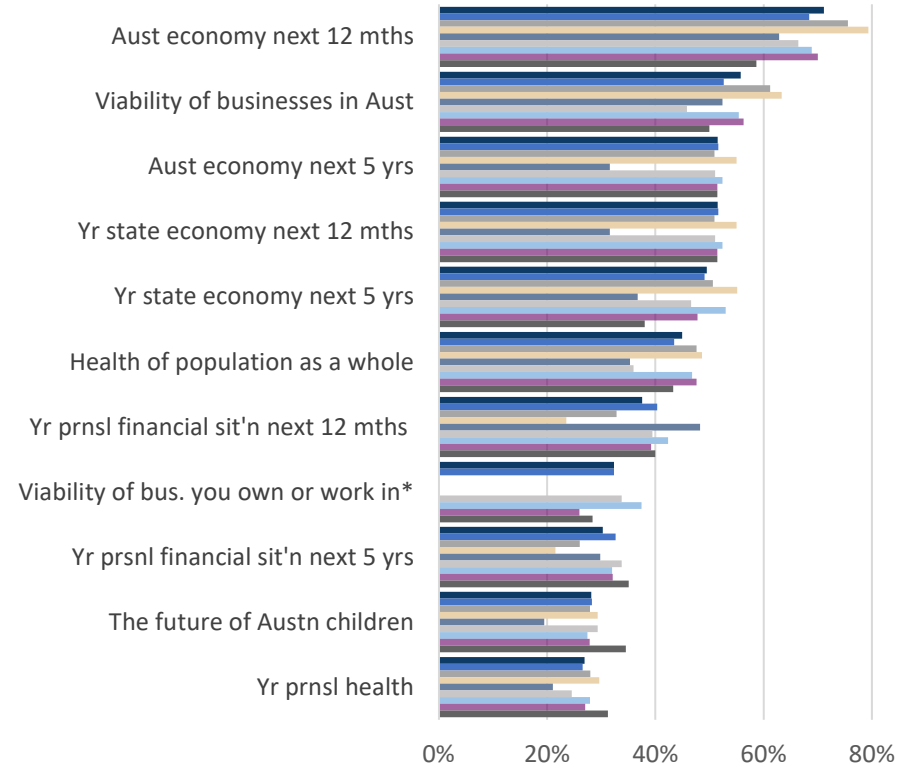
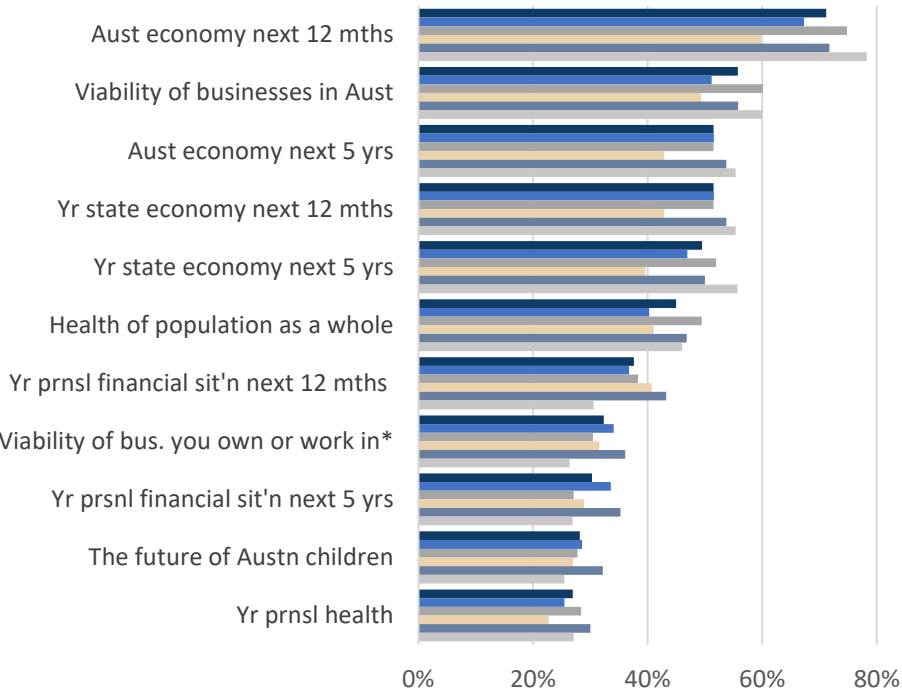
What three things do you think governments in Australia should be focusing on right now to address the coronavirus crisis?

Different age groups perceive the threat of coronavirus differently.

Coronavirus poses a major threat

By Demographics

By Employment



Major Threat Shown

What level of threat do you think the coronavirus crisis poses to each of the following? *Asked of employees only

- Younger voters (18-34 year olds) are less likely to perceive coronavirus as a major threat to their personal health. Despite this, nearly a quarter (23%) perceive it to be a major threat
- The over-55s are the most pessimistic about the economic threat posed by coronavirus, with 78% of over-55s saying it poses a major threat to the Aust economy over the next 5 yrs, and 56% saying it poses a major threat to their state economy over the next 5 years
- 35-54 year-olds – working aged voters more likely to have young families – are the age group who see coronavirus as the biggest threat to their personal financial situation over the next 5 years (355)

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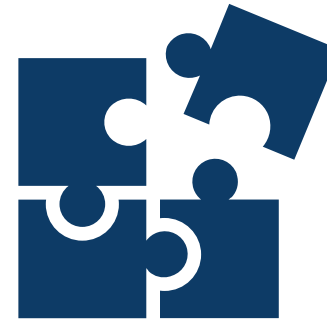
Qualitative

- Focus groups, depth interviews, triads, mini-groups
- In-person and online using our dedicated focus group platform (not Zoom)
- Key message and material development and testing



Quantitative

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- Tracking studies
- Segmentation
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