



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

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

**TRUE ISSUES®**

**MARCH 2022**



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## Survey methodology



### National Online Survey

#### n=1,000 Australian adults

- Conducted Friday 4<sup>th</sup> – Tuesday 8<sup>th</sup> March 2022.
- 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?**

# Health, the environment and economy lead top of mind issues – concern is up on living costs, housing and rates



As Australia moves further into its COVID-19 recovery and continues to respond to the devastating floods in NSW and Queensland, health remains the leading **top of mind** concern for Australians, followed by the environment and climate change, 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 continue to describe issues related to hospitals, healthcare and ageing (37%, equal to November). This remains significantly down on last July (59%) when Australia was grappling with COVID-19 winter outbreaks, lockdowns and the vaccine rollout.

As Australians move on from the summer Omicron outbreaks and begin to carve out a ‘new normal’, just 15% of adults mention the COVID-19 pandemic as a key concern (down from 25% in November and 47% in July).

The environment and climate change (27%) remains the second most important individual issue to Australians, ahead of the economy and finances (24%), following summer bushfires in WA and amid the ongoing flood response in the eastern states.

Total mentions of economic issues – the economy and finances, employment and wages, cost of living and housing and interest rates – are at 49% (a lower 39% among 18 to 34 year olds).

Heading into the expected May federal election, rising living costs are beginning to bite, particularly among 35 to 54 year olds managing the rising costs of mortgages and child rearing in a period of low wage growth.

Top of mind mentions of cost of living (16%) have risen five points in just the last four months (from 11% in November) and have doubled since last July (8%). Mentions of housing and interest rates have also increased (14%, up from 10% in November) amid ongoing media speculation about inflation and mortgage rate rises in 2022.

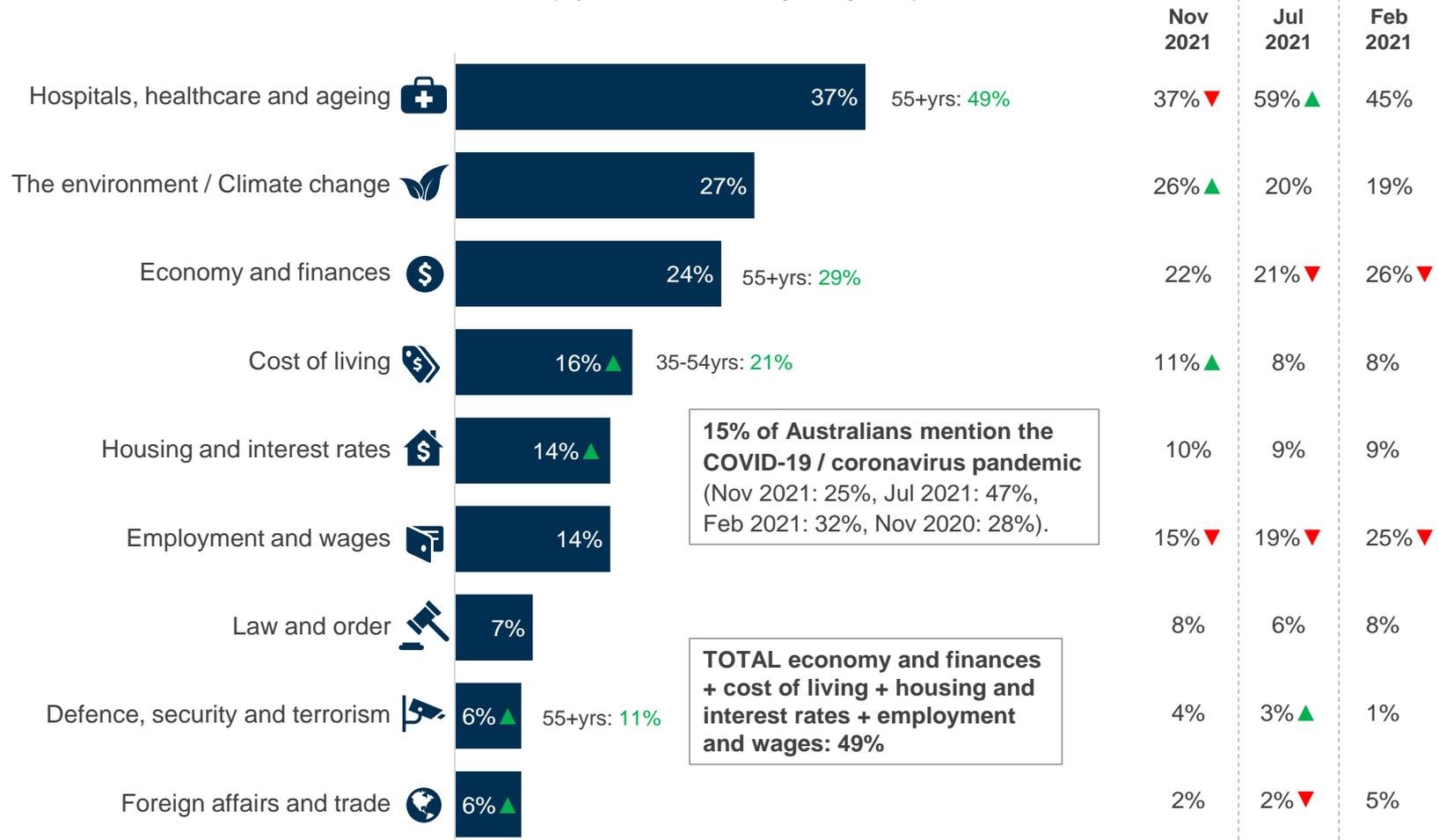
Concerns about employment and wages (14%) have become less top of mind, since peaking at 32% in November 2020 but remain a community priority.

Following the Russian invasion of Ukraine, foreign affairs and trade (6%, up from 2%) is more top of mind for Australians than in November, as are general concerns about defence, security and terrorism (6%, up from 4%).

# Health continues to lead top of mind concerns, followed by the environment and economic issues



Most important issues the Australian Government should focus on  
(Up to 3 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).

# Living costs and health lead prompted issues followed by the environment, economy – concern up on housing, rates



Amid ongoing media coverage around the rising cost of housing, groceries, petrol and energy, as well as potentially imminent interest rate increases, cost of living (65%, up from 59%) is Australians' top **prompted** priority for Federal Government attention.

Calls for action on living costs have been building over the past year, after taking a backseat to health during the worst of the pandemic, and are now even stronger than pre-COVID-19 (65%, higher than 59% in February 2020).

However, as we continue to manage further COVID-19 outbreaks and emerging variants, hospitals, healthcare and ageing also remains a key concern for most Australians (61%, similar to 58% in November).

Around four in ten adults remain concerned about the environment and climate change (42%), the economy and finances (42%) and employment and wages (38%), and these continue to round out the top five most important (prompted) issues to Australians.

Sitting just outside this top five, and on the increase, is housing and interest rates (36%, up from 30% in November and ten points higher than in February 2021).

Generational differences persist. Hospitals, healthcare and ageing continues to dominate concerns among those aged 55 years and over (77%).

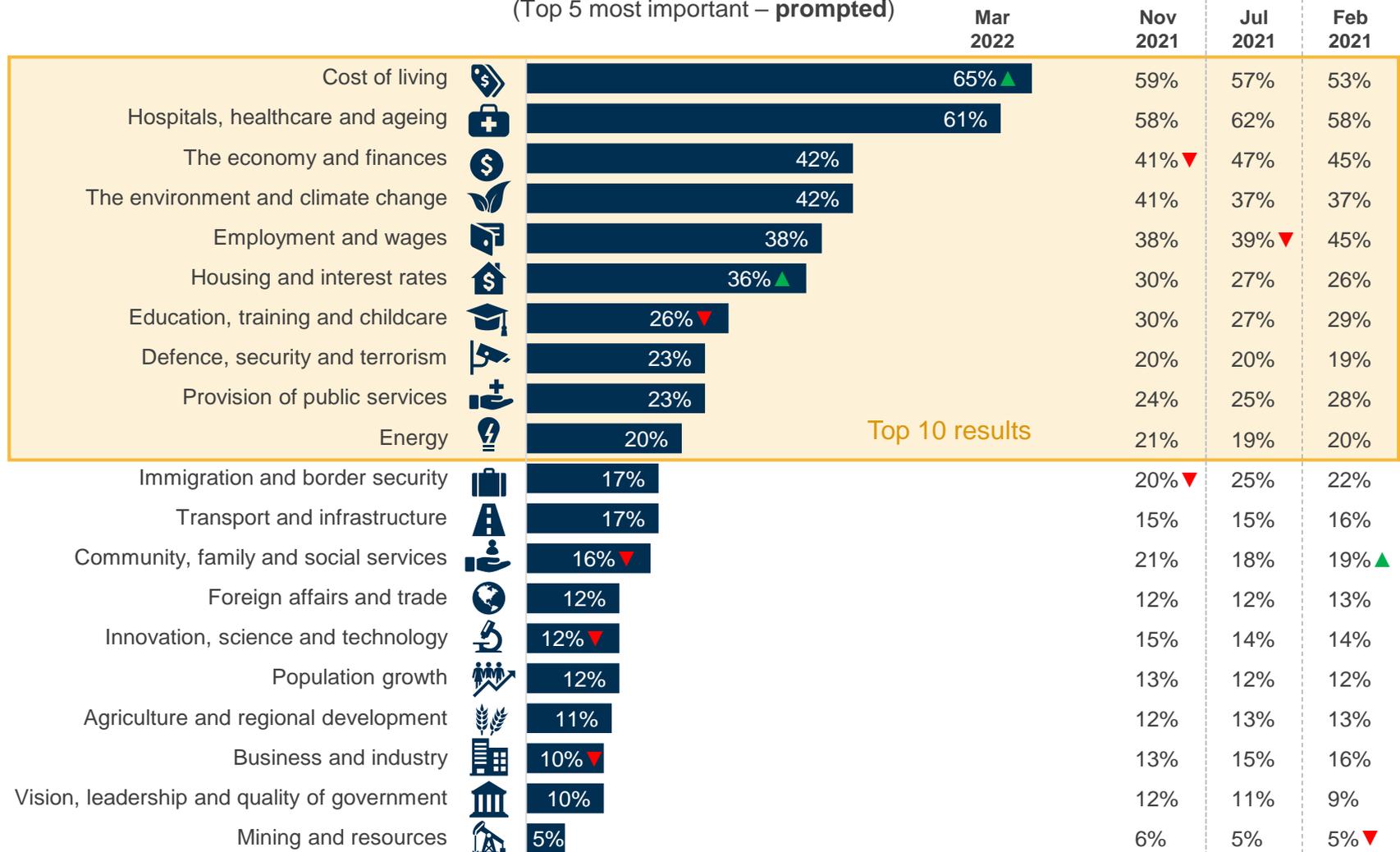
In contrast, 18 to 34 and 35 to 54 year olds continue to most want Government action on cost of living (60% and 74%, respectively).

With these cohorts being more greatly impacted by strong property prices and rising mortgage rates, housing and interest rates is a top five priority for more than four in ten 18 to 34 year olds (instead of the economy and finances) and 35 to 54 year olds (instead of employment and wages).

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



## 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.

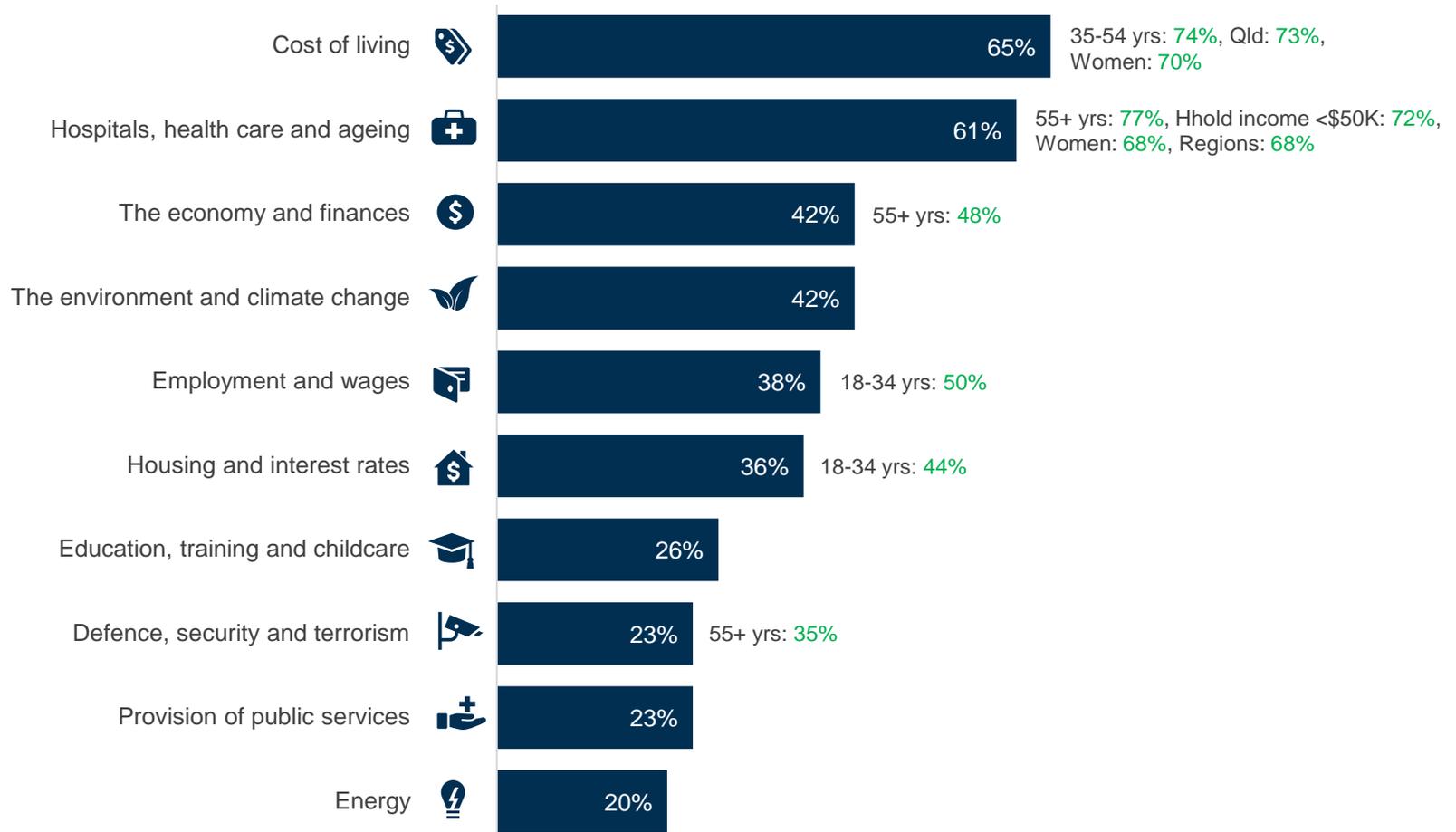
Q. From the following list, please select the five most important issues you think the Australian Government should focus on.

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

# Healthcare most important to older adults, jobs and interest rates higher concerns among young adults



## 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?**

# Confidence in the direction of national and state and territory economies continues to decline



While public confidence in personal circumstances, local communities, and business and industry is stable, sentiment around national and state / territory economies continues to decline. For the first time since July 2020, more Australians see the national economy heading in the wrong direction, than see it heading in the right direction.

Australians remain positive about their own personal situation and local community. More than twice as many think these are heading in the right direction (37% and 32%, respectively), as think they are heading in the wrong direction (16% for each).

While this optimism is unchanged from November, it is weaker than in February 2021, when more Australians saw themselves and their communities heading in the right direction over the coming year (43% and 37%, respectively).

There is positive sentiment around business and industry. More adults see these heading in the right direction in 2022 (31%), than heading in the wrong direction (17%).

In contrast, there remain very mixed views on the national economy with slightly more Australians seeing this heading in the wrong direction (30%, up from 26% in November), than in the right direction (28%, similar to 27% in November).

However, this is still a stronger position for the Coalition Government, compared to the period heading into their May 2019 election campaign (29% wrong direction, 21% right direction in February 2019).

Confidence in state and territory economies remains only a little stronger by comparison (33% right direction) and has continued to edge off at a national level over the past 12 months (from 34% in November, 37% in July and 40% in February 2021).

As states and territories grapple with the fallout of COVID-19 summer outbreaks and two years of general disruption, more adults now see these economies as heading in the wrong direction (28%, up from 23% in November).

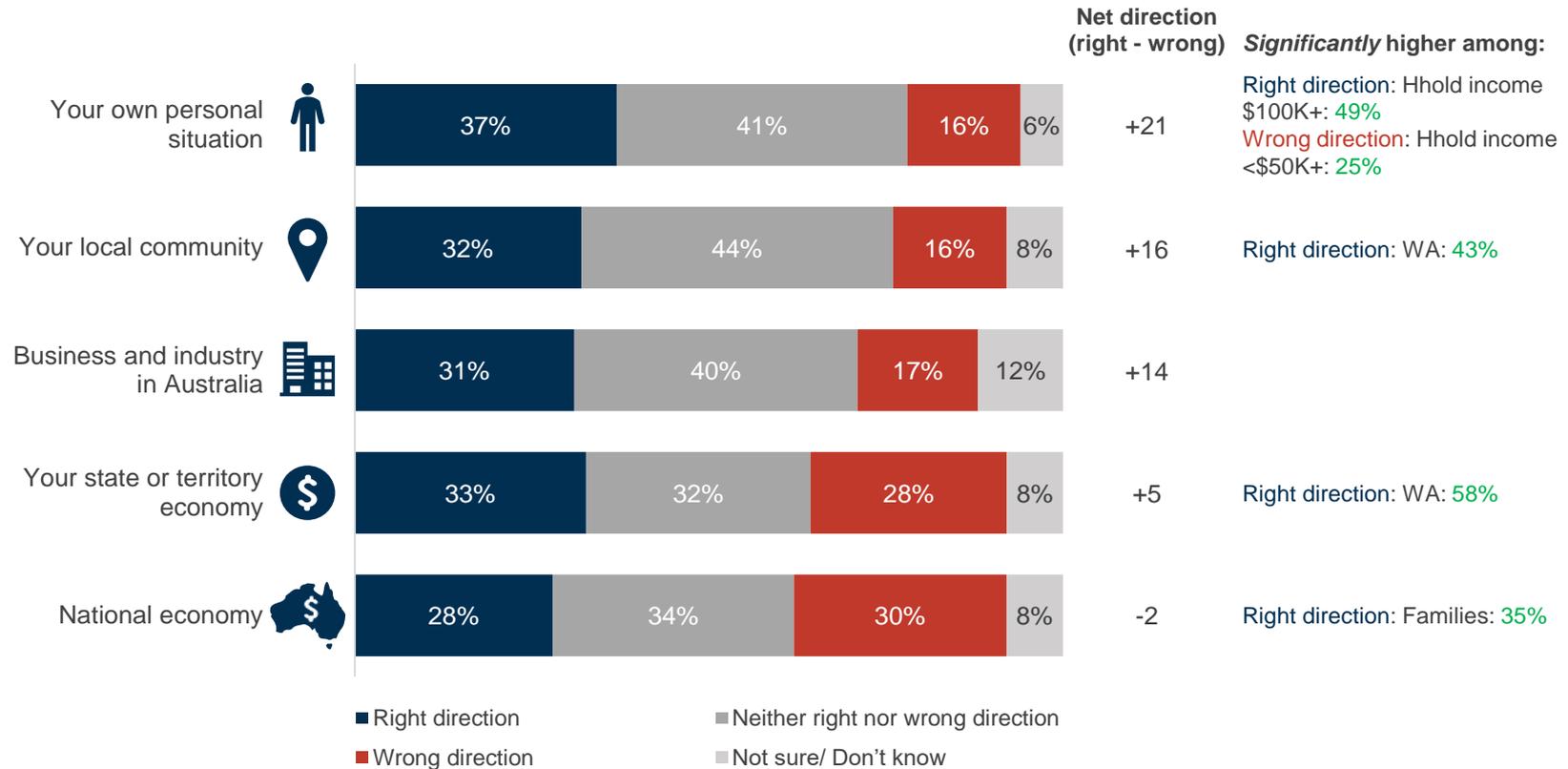
Less disrupted by COVID-19 overall, a majority of WA residents (58%) continue to see their state economy as heading in the right direction.

In contrast, residents of other mainland states have very mixed views, with around three in ten residents seeing their state economy as heading in the right direction, and a similar number seeing it as heading in the wrong direction (NSW: 29% vs 29%; Victoria: 30% vs 30%, Queensland: 31% vs 29%, SA: 32% vs 30%).

# Australians are optimistic about their own situation and community and Australian business – but not our economies



## Direction of organisations and groups in Australia

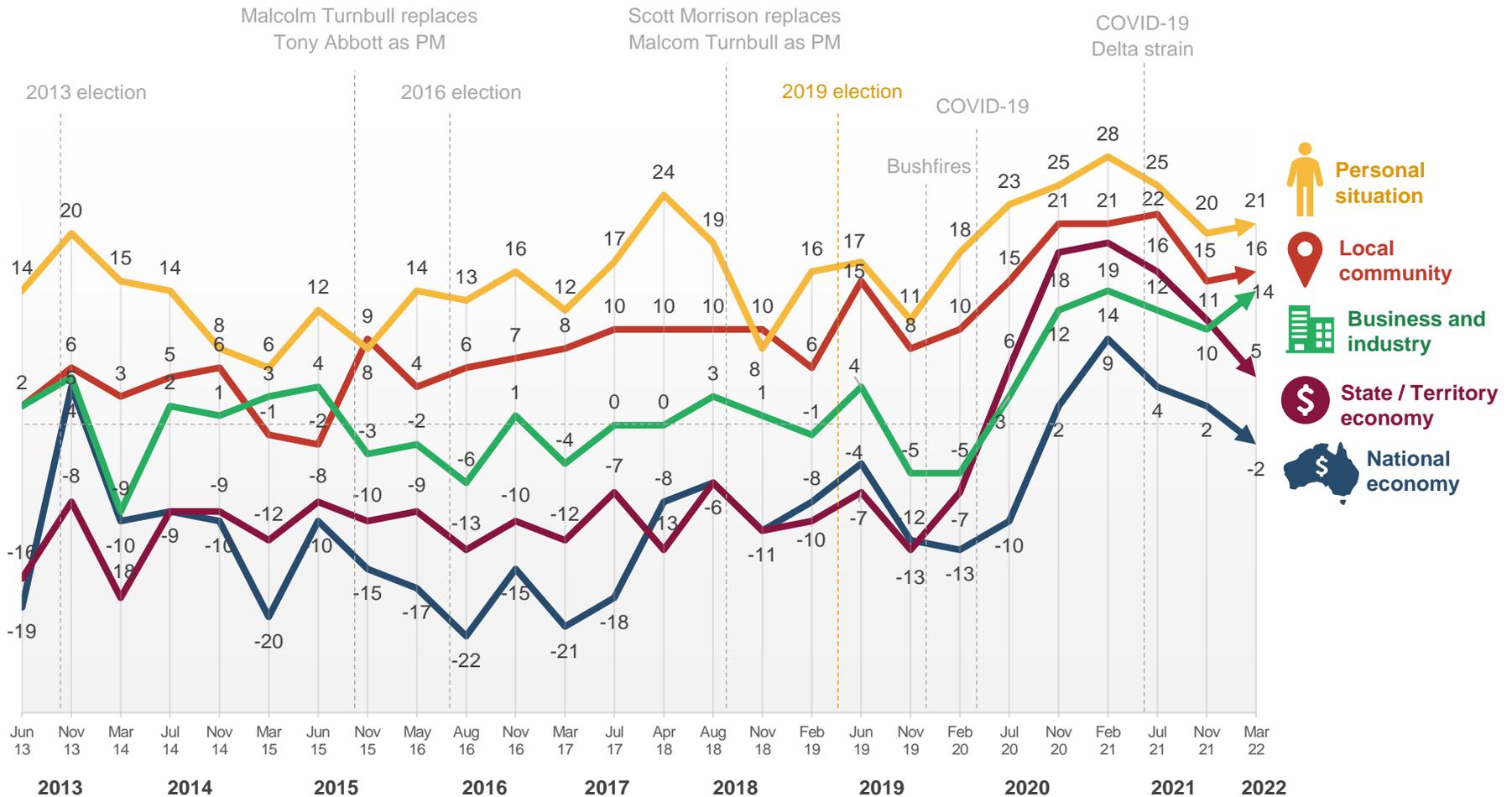


Significantly higher than the national total at the 95% confidence interval.  
 Q. Do you think each of the following is generally headed in the right or the wrong direction?  
 Base: All respondents (n=1,000).

# Optimism continues to slide for national and state and territory economies



**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 further across many key areas since November



Heading into its next campaign for re-election, the Morrison Government's performance ratings have fallen further across most key areas since November, having previously declined from July 2021.

The largest declines include key community pressure points where the Government is already seen to be performing poorly, such as hospitals, healthcare and ageing (index of 41, down a further four points), housing and interest rates (index of 41, down a further two points) and cost of living (index of 36, down a further two points).

The Federal Government has also seen similar declines on innovation, science and technology (index of 50), transport and infrastructure (index of 49) and the economy and finances (index of 48), each down a further two points since November.

On a positive note, small gains have been made in the Government's traditionally better performing areas of business and industry (index of 54, up two points) and mining and resources (index of 53, up one point), as well as on foreign affairs and trade (index of 48, up one point). However, none have recovered back to the previously higher ratings they recorded in July.

Overall, the Government's best performing area continues to be defence, security and terrorism (index of 55).

Notably, younger Australians, those with dependent children and higher income households typically rate the Government's performance significantly above average across many of these key areas of responsibility.

Key mining states, WA and SA also rate the Government's performance on mining and resources more favourably than those in other states.

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



## Australian Government performance on issues

(Performance index#)

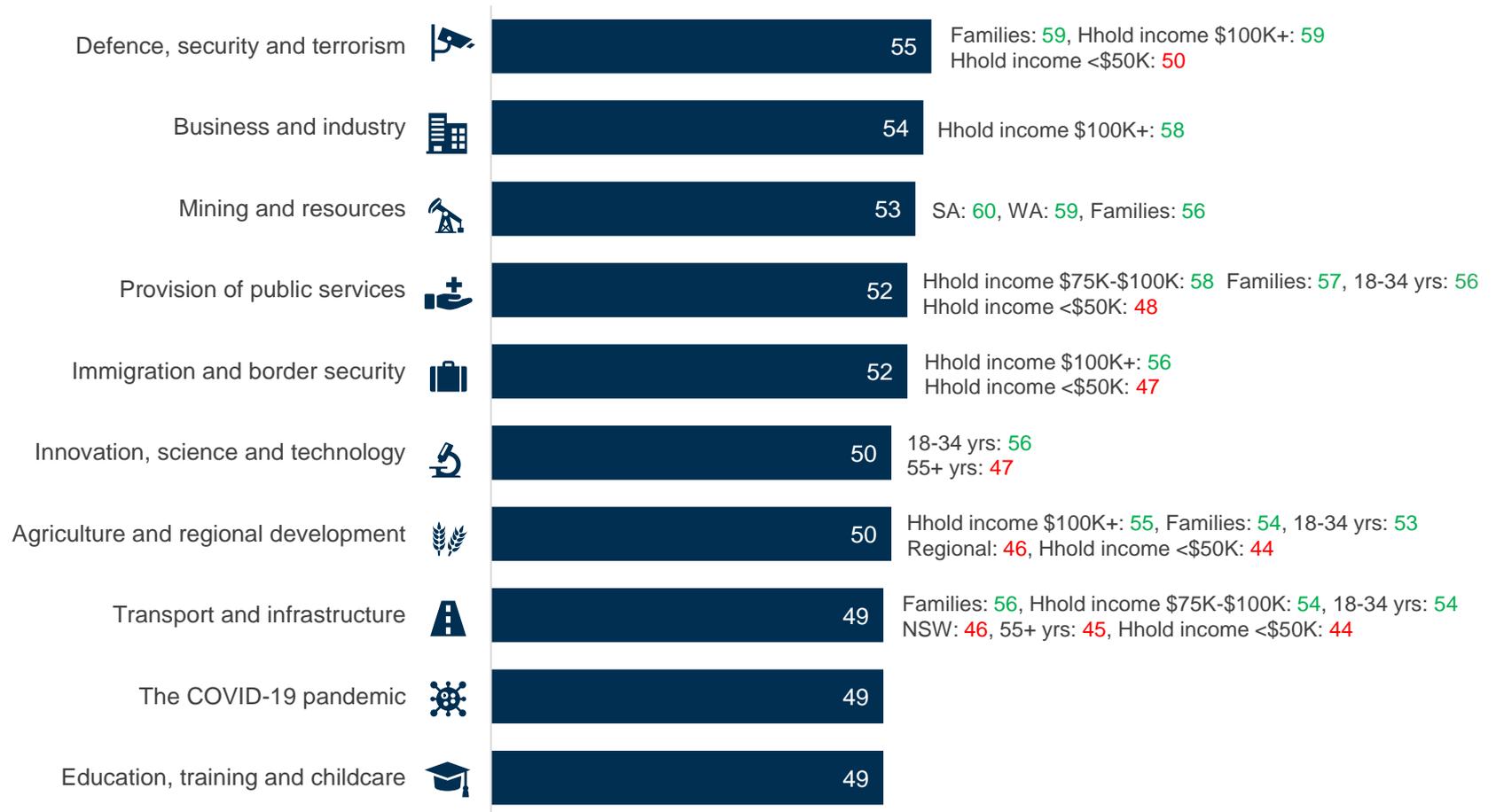
		Mar 2022	Nov 2021	Jul 2021	Feb 2021
Defence, security and terrorism		55	56	59	61
Business and industry		54	52	57	57
Mining and resources		53	52	56	56
Provision of public services		52	52	55	55
Immigration and border security		52	53	53	54
Innovation, science and technology		50	52	54	54
Agriculture and regional development		50	50	52	52
Transport and infrastructure		49	51	54	53
The COVID-19 pandemic		49	-	-	-
Education, training and childcare		49	50	54	53
		<b>Top ten results</b>			
Foreign affairs and trade		49	48	52	51
Population growth		49	49	53	50
The economy and finances		48	50	53	53
Community, family and social services		48	49	51	53
Employment and wages		45	46	48	48
Energy		44	45	48	46
Vision and leadership		42	43	46	48
Hospitals, health care and ageing		41	45	48	50
Housing and interest rates		41	43	47	48
The environment and climate change		40	41	44	44
Cost of living		36	38	42	42

# 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).

# Higher-income households, families and young adults rate Government performance higher in many key areas



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



#For an explanation of how index scores are calculated refer to the survey methodology section of this report. Significantly higher / lower than the national total at the 95% confidence interval.  
Q. How would you rate the performance of the Australian Government on each of the following issues?  
Base: All respondents (approximately n=1,000 per wave).



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

# Federal and State / Territory Government performance ratings continue to decline



As the next Federal Budget and election looms, the Morrison Government's performance has fallen further since November (index of 47, down from 50) and now rates only slightly above pre-COVID-19 levels (index of 45).

This extends its steady decline from a series high result in July 2020 (index of 63) following its early COVID-19 response, back to the poorer sentiment recorded prior to the pandemic (index scores below 50). However, the Federal Government remains in a stronger position now than going into its May 2019 election win (index of 43 in February 2019).

While the number of Australians who rate the Federal Government's performance as very good or good (35%) has been maintained since November, this is well below its July 2020 peak (58%), and ratings of its performance as very poor or poor continue to increase (33%, up from 28% in November).

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 November (index of 54, down from 57).

Also outperforming the Federal Government but slightly down after a year of relative stability, are business and industry (index of 56, down from 57) and local councils (index of 52, down from 54).

As the states and territories find their new 'COVID normal', after two years of pandemic-related restrictions, the WA State Government continues to significantly outperform other states with a performance index score of 74.

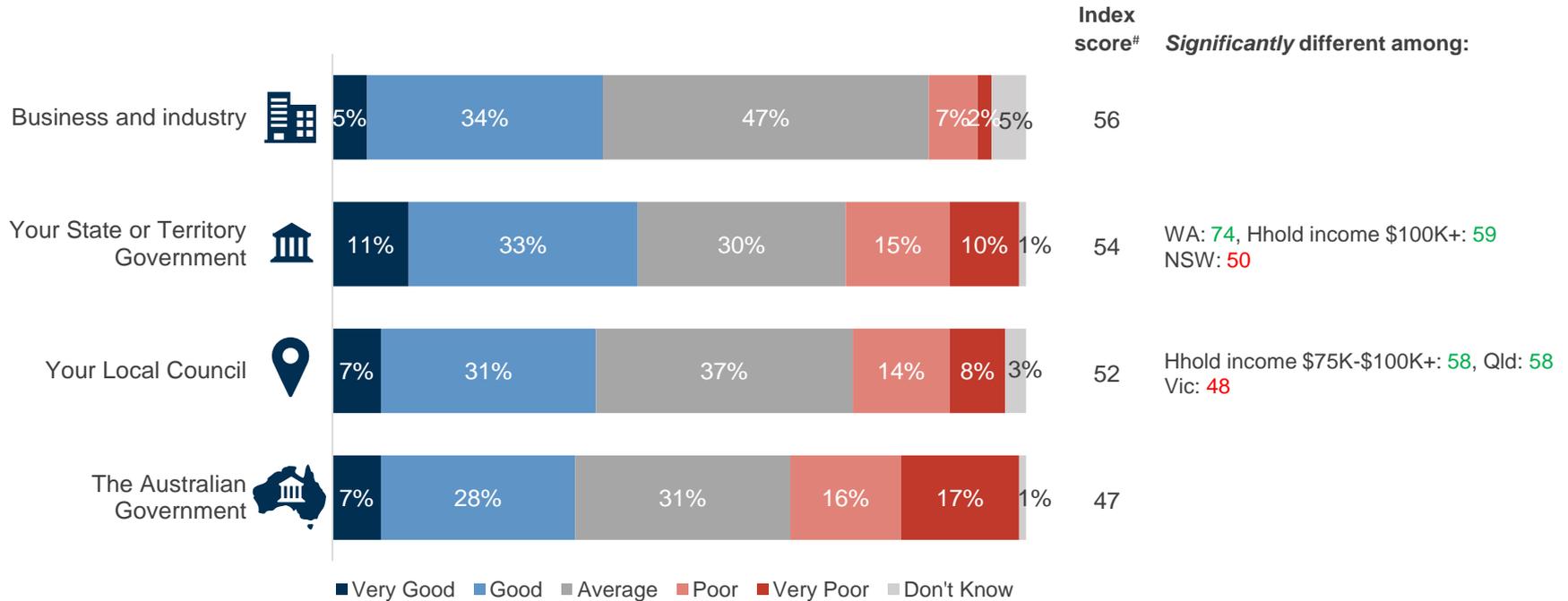
The rated performance of State Governments in Queensland, Victoria and SA are in line with the national average (index of 55, 51 and 50, respectively)

Following a difficult summer dealing with a major Omicron outbreak and amid the state's worst floods in 40 years, rated performance of the NSW Government has fallen below the national average in March (index of 50, down from 56).

# Business and industry, and state and local governments continue to outperform the Federal Government



## Performance of organisations and groups in Australia

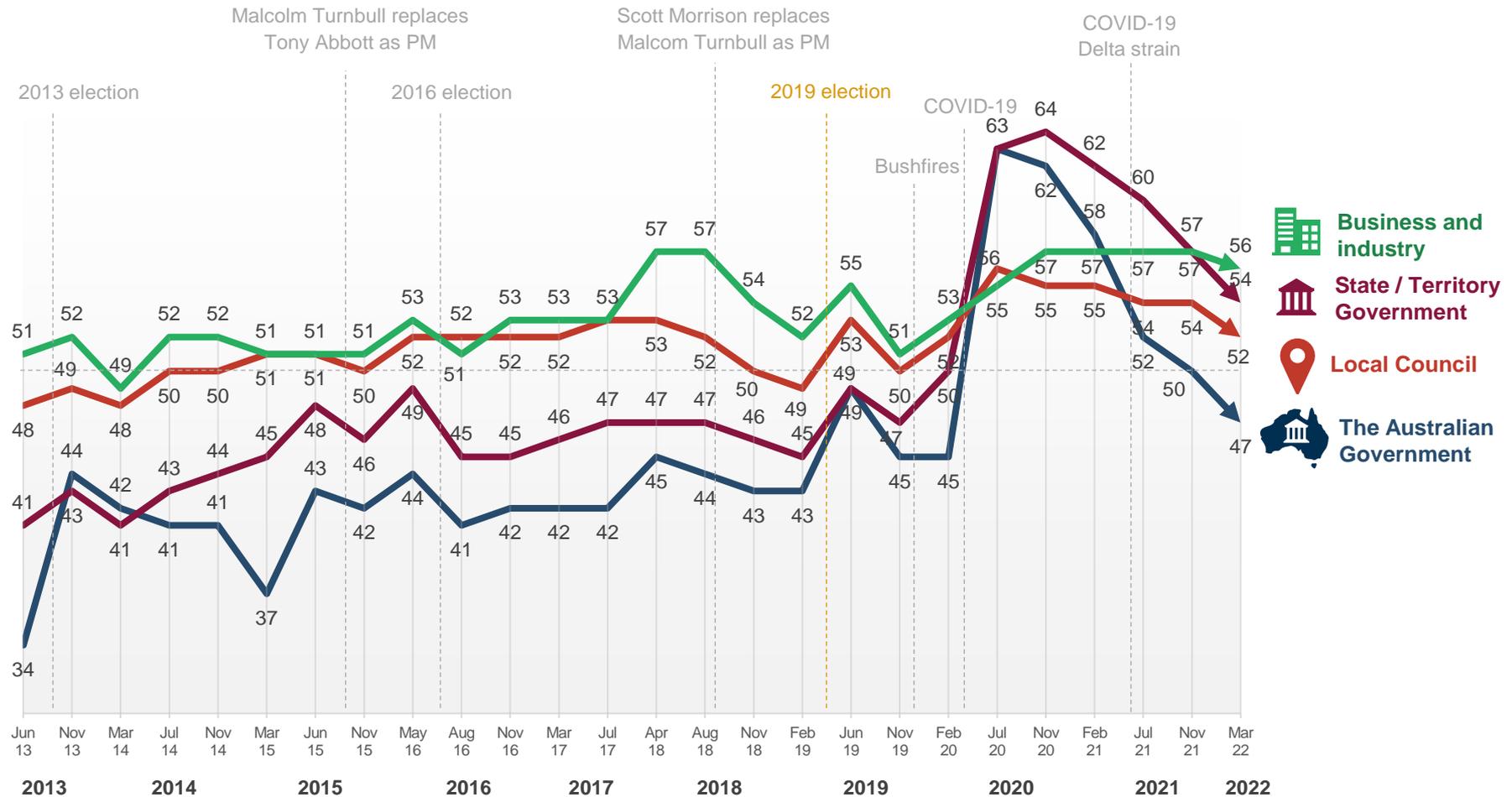


<sup>#</sup>For an explanation of how index scores are calculated refer to the research methodology section of this report. Significance interval. Q. How would you rate the current performance of each of the following organisations or groups in Australia? Base: All respondents (n=1,000).

# Federal, State and Territory Government performance continue to decline, now just above pre-COVID-19 levels



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).



# How engaged are voters in the 2022 Federal Election?

# Majority of voters fairly certain or already decided on 2022 vote – health, climate, economic concerns key factors



With the ‘unofficial’ election campaign now well underway, more than four in ten voters are extremely (19%) or very interested (24%) in what is going on in Australian federal politics and the upcoming 2022 Federal Election.

Coinciding with increased concerns over cost of living, interest is strongest among voters in households earning \$75,000 to \$100,000 per year, as well as among male voters (59% and 51%, respectively, are extremely or very interested). In contrast, female voters are less engaged in federal politics and the upcoming election, with only 35% extremely or very interested.

The leading issues voters say will decide their 2022 election vote are largely in line with those mentioned as general concerns requiring Federal Government attention.

When asked to name up to three issues that will decide their vote at the upcoming 2022 federal election, almost one in four voters describe issues related to the environment and climate change (24%) and hospitals, healthcare and ageing (23%). (This compares with health’s ten-point lead over the environment and climate change as a general unprompted issue or concern).

Again, a range of economic concerns follow, including economic management (19%), cost of living (17%), housing and interest rates (12%), and employment and wages (9%). In total, 43% of voters mention at least one of these issues as deciding their 2022 vote.

One in ten voters mention issues related to COVID-19 (10%) and almost as many mention vision and leadership (9%) as a decision factor, one of the Morrison Government’s poorer performing areas (index score of 42).

A majority of voters (60%) have largely decided which party they will support at the upcoming federal election. This includes more than a third who have either already decided their vote (20%) or always vote the same way (15%), and one in four who are fairly certain who they will vote for (24%).

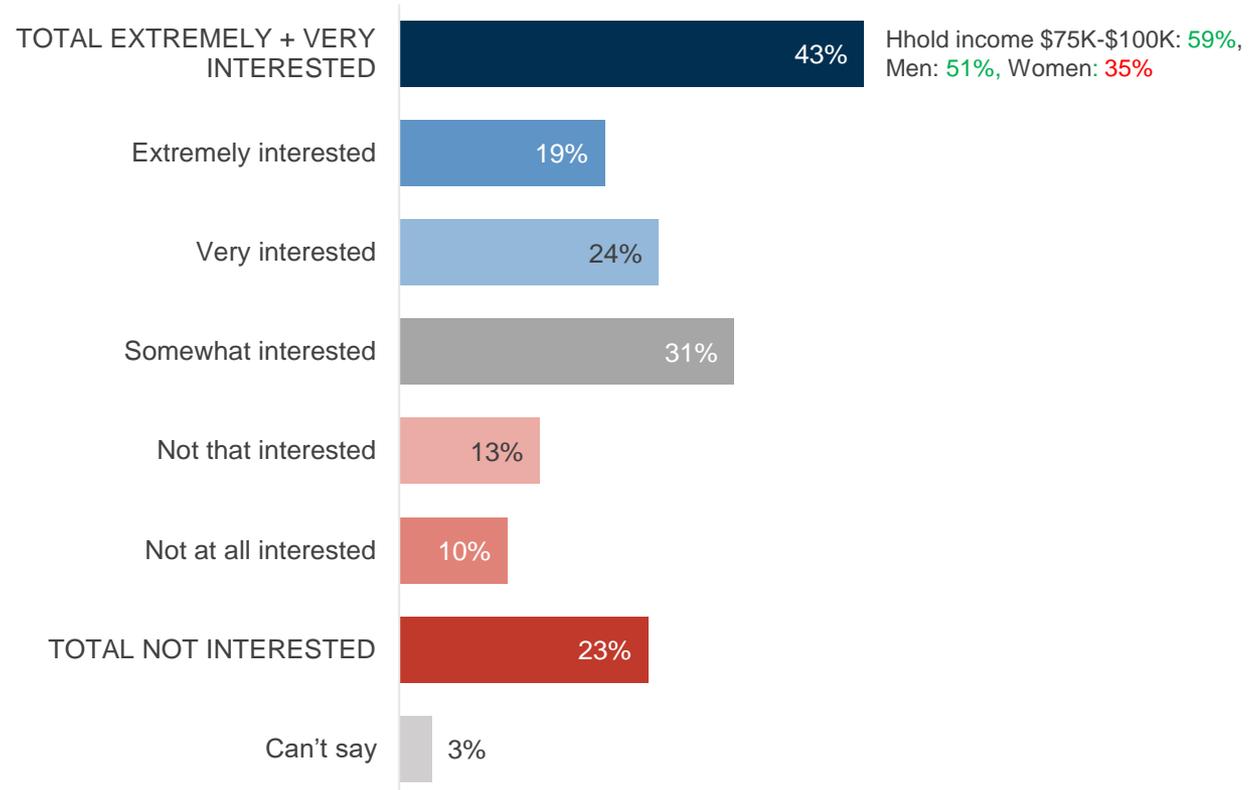
Three in ten voters (31%) are either less solid (16% leaning towards a particular party) or undecided (14% have no leaning as yet). The balance (10%) did not select a response.

Voters who are more interested in federal politics and the upcoming election are more likely to have a firmer view of which party they will vote for. The votes of those less engaged (only somewhat interested or not interested) are more likely to still be up for grabs.

# Men and households earning \$75K-100K per year most interested in federal politics and the upcoming election



## Interest in Australian federal politics and upcoming 2022 Federal Election



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

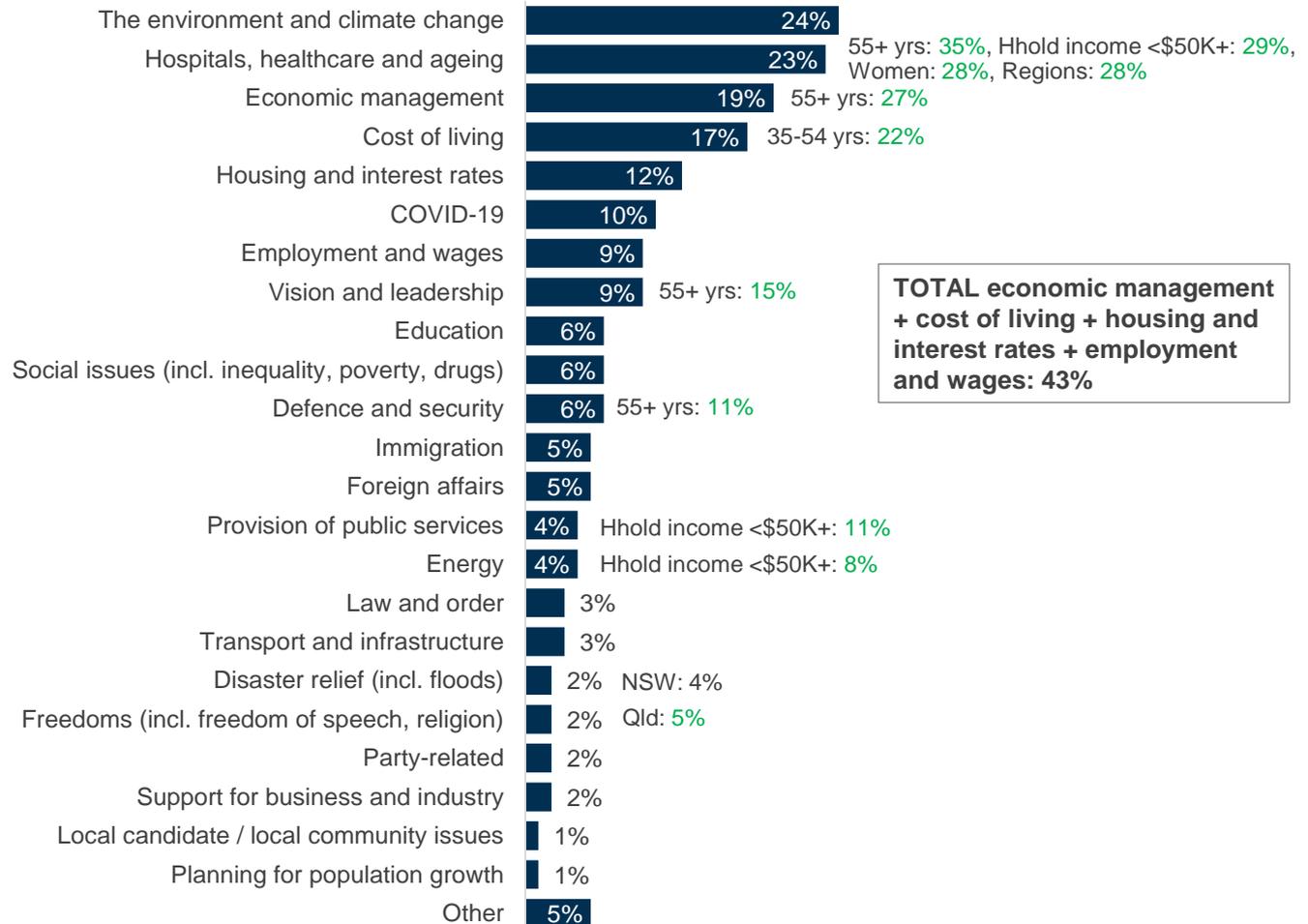
Q. The next Federal Election is due by May this year. At the moment, how interested are you in what's going on in Australian federal politics and the upcoming 2022 Federal Election?

Base: Eligible to vote (n=918).

# Environment, health, economic management and cost of living most top of mind as deciding factors for 2022 election



## Most important issues that will decide vote at upcoming 2022 Federal Election (Up to 3 issues – unprompted)



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

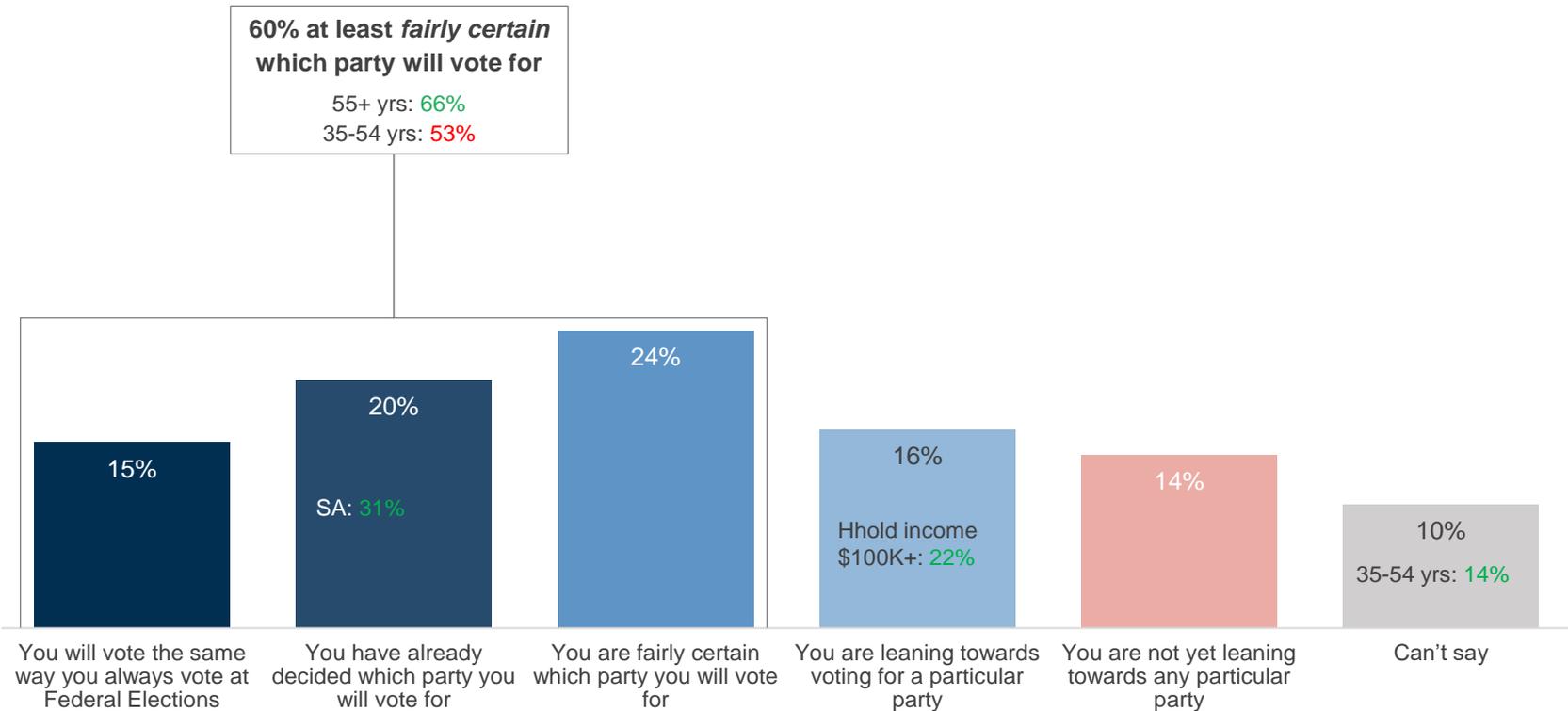
Q. What are the **most important** issues that will decide your vote at the upcoming 2022 Federal Election? Please describe up to three separate issues in the text boxes below. Please be as specific as you can.

Base: Eligible to vote (n=918).

# Majority of voters fairly certain or already decided on 2022 election vote, but many votes still up for grabs



Certainty of vote at upcoming 2022 Federal Election



Significantly *higher* than the national total at the 95% confidence interval.  
 Q. Which one of these best describes you in relation to the upcoming 2022 Federal Election?  
 Base: Eligible to vote (n=918).

# Those less interested in the upcoming election are more likely to be undecided in their vote



## Interest in Australian federal politics and certainty of vote at upcoming 2022 Federal Election

	Total	Extremely interested	Very interested	Somewhat interested	Not that interested	Not at all interested	Can't say*
You will vote the same way you always vote at Federal Elections	15%	21%	15%	13%	14%	20%	0%
You have already decided which party you will vote for	20%	35%	30%	13%	8%	12%	8%
You are fairly certain which party you will vote for	24%	22%	25%	29%	28%	8%	5%
You are leaning towards voting for a particular party	16%	12%	17%	24%	16%	2%	9%
You are not yet leaning towards any particular party	14%	7%	8%	16%	22%	31%	9%
Can't say	10%	3%	5%	6%	12%	28%	70%

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

Q. Which one of these best describes you in relation to the upcoming 2022 Federal Election?

Base: Eligible to vote (n=918).

\*Caution: small sample size (n<30).

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