



TRUE ISSUES®

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

August 2022



J W S R E S E A R C H



Contents

<u>Survey methodology</u>	<u>3</u>
<u>What are the issues Australians care about?</u>	<u>4</u>
<u>Are we headed in the right direction?</u>	<u>10</u>
<u>How does the Australian Government perform on top issues?</u>	<u>14</u>
<u>How are government, business and industry performing?</u>	<u>18</u>





Survey methodology



National Online Survey

n=1,000 Australian adults

- Conducted Friday 12th – Monday 15th August 2022.
- 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=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%	-	-
Index score			43



What are the issues Australians care about?

Cost of living and health are top of mind – concern about living costs, housing and interest rates up since March



As the new Labor Government settles into its first Parliamentary term, living costs lead **top of mind** concerns for Australians, ahead of health and ageing, 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 describe issues related to cost of living (38%) or hospitals, healthcare and ageing (34%).

This is a substantial increase in concern about cost of living since March, when fewer than half this number (16%) saw it as an issue needing Government attention, but a similar level of concern about health and ageing (37%).

As Australians move on from the worst of the COVID-19 pandemic, few now mention it as a key concern (8%, down from 15% in March and 47% last July).

The environment and climate change (25%) is the next most important individual issue to Australians, ahead of the economy and finances (20%, down from 24%) and housing and interest rates (18%), which continues to be more top of mind as mortgage rate increases begin to hit family budgets (up from 14% in March).

Total mentions of cost of living, the economy and finances, and housing and interest rates are at 65%.

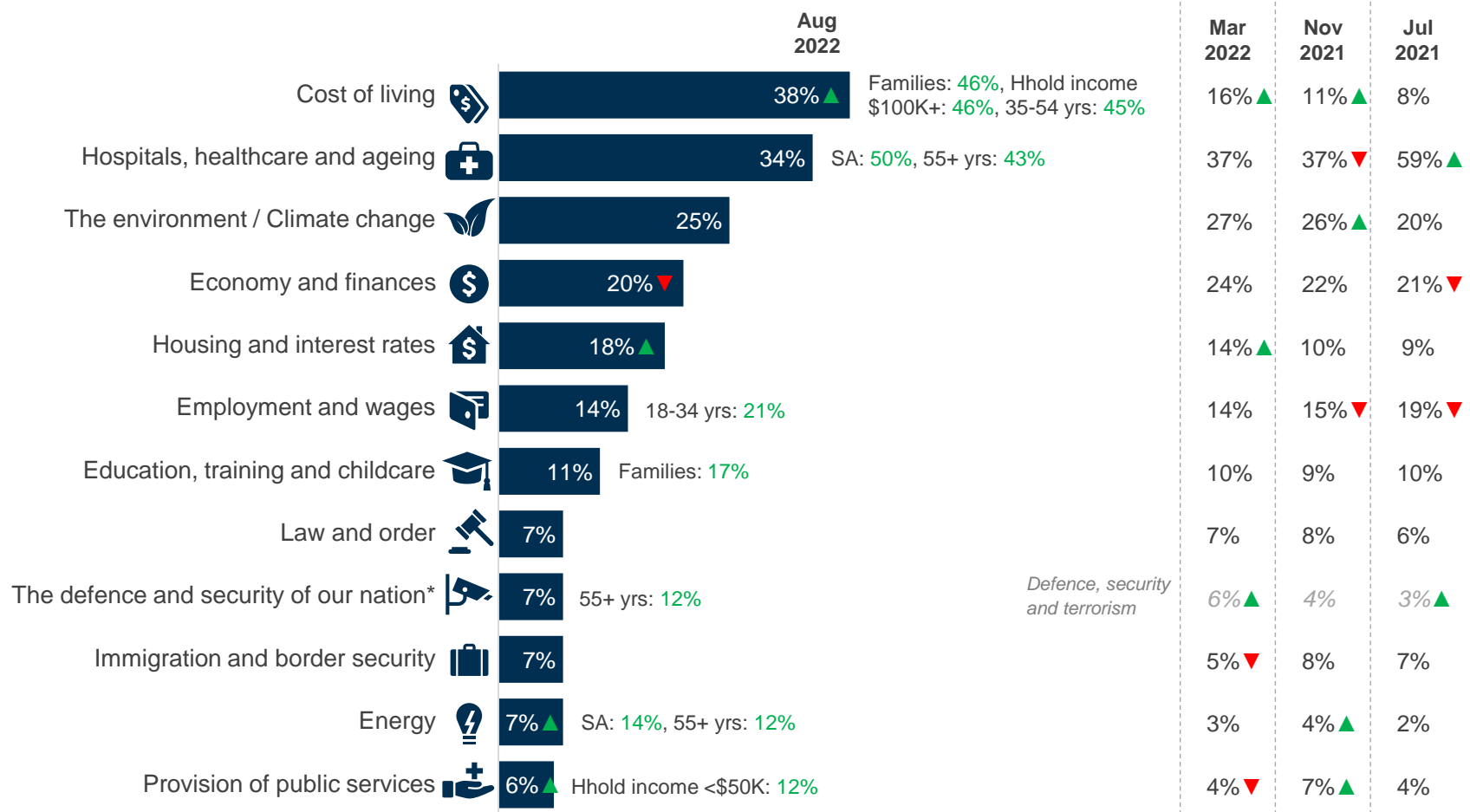
Rising living costs continue to bite, particularly among 35 to 54 year olds managing the rising costs of mortgages and child rearing in a prolonged period of low wage growth.

Amid public debate about energy supply and rising costs, energy (7%, up from 3%) is more top of mind for Australians than in March, as are general concerns about the provision of public services (6%, up from 4%).

Cost of living emerges as leading top of mind concern, ahead of health, the environment and the economy



Most important issues the Australian Government should focus on (Up to 3 issues – unprompted^)



^ Note: Issues mentioned among fewer than 6% not shown.

* Added in August 2022, previously 'Defence, security and terrorism'

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 economy and interest rates – concern up on energy



Amid rising housing, groceries, petrol and energy costs, and following four consecutive interest rate increases, cost of living remains Australians' top **prompted** priority for Federal Government attention – now at almost two thirds of adults (73%, up from 65% in March).

Hospitals, healthcare and ageing remains the other dominant issue for most Australians (59%, similar to 61% in March), as stretched state health systems work to manage winter COVID-19 and flu outbreaks, and initial aged care reforms work their way through Parliament.

Around four in ten adults remain concerned about the economy and finances (44%) – and about housing and interest rates (39%), which increased 12 points over the last year on the expectation of imminent RBA rate rises.

These are followed by employment and wages (36%) – and the environment and climate change (36%, down from 42%), which has decreased since March, following the election of the new Labor Government and passing in the lower house of its Climate Change Bill to cut emissions by 43% by 2030.

Concern about energy has increased sharply since March (31%, up from 20%), amid ongoing public debate about energy supply and costs and following the suspension of the main electricity market in June.

Generational differences persist. Older adults aged 55 years and over most want Government action on hospitals, healthcare and ageing (72%), ahead of living costs (64%).

However, cost of living dominates concerns among those aged 18 to 34 years (77%) and 35 to 54 years (81%), with employment and interest rates the next most important issues among 18 to 34 year olds.



Living costs and health continue to lead prompted concerns, ahead of the economy and interest rates

Most important issues the Australian Government should focus on (Top 5 most important – prompted)



* Added in August 2022, previously 'Defence, security and terrorism'

^ Added in August 2022

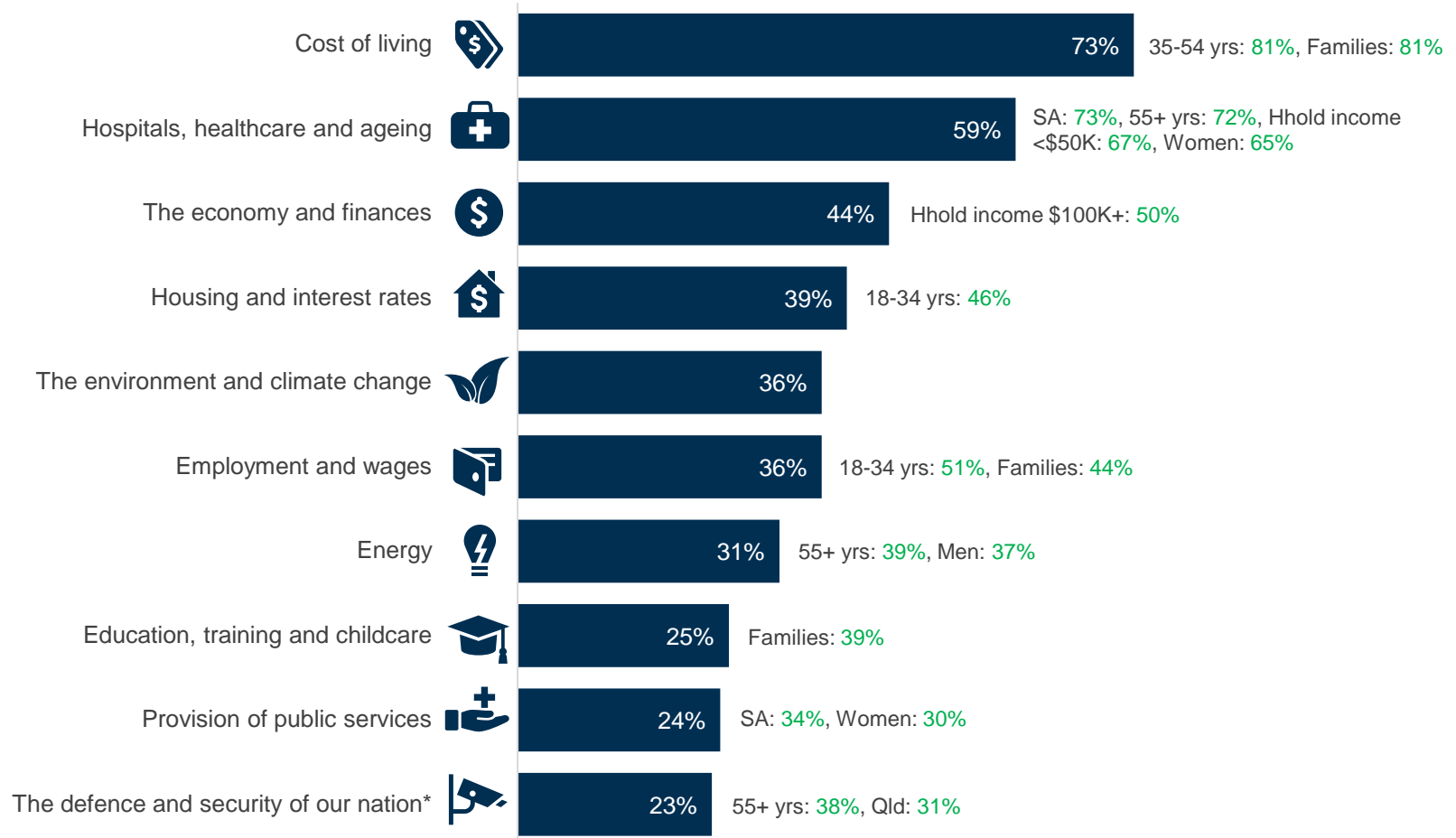
Significantly higher / lower than previous True Issues wave at the 95% confidence interval.

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).

Health most important to older adults – living costs, interest rates, jobs higher concerns for younger adults and families

Highest ranked issues the Australian Government should focus on (Top 5 most important – prompted)



* Added in August 2022, previously 'Defence, security and terrorism'

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 business and industry down since March and further declines on national and state / territory economies



While public confidence in personal circumstances and local communities has been relatively stable since last November, confidence in business and industry has fallen sharply since March and continues to decline for national and state / territory economies amid talk of an impending recession.

Community sentiment around the national economy is now back to pre-COVID-19 pandemic levels and, for the first time since February 2020, more Australians see state / territory economies heading in the wrong direction, than see them heading in the right direction.

Australians remain positive about their own personal situation and local community. Similar to March, around twice as many think these are heading in the right direction (39% and 30%, respectively), as think they are heading in the wrong direction (17% and 16%, respectively).

There is less positive sentiment around business and industry. Compared to March, fewer see these heading in the right direction (25%, down from 31%) and more see these heading in the wrong direction (19%, up from 17%).

More Australians see the national economy heading in the wrong direction since March (33% up from 30%) and fewer see it heading in the right direction (20%, down from 28%).

Confidence in state and territory economies remains a little stronger by comparison (26% right direction vs 30% wrong direction), but is also in decline (from 33% right direction vs 28% wrong direction in March).

Community opinion continues to vary by state. Half of WA residents see their state economy heading in the right direction, although this optimism has softened since March (50%, down from 58%).

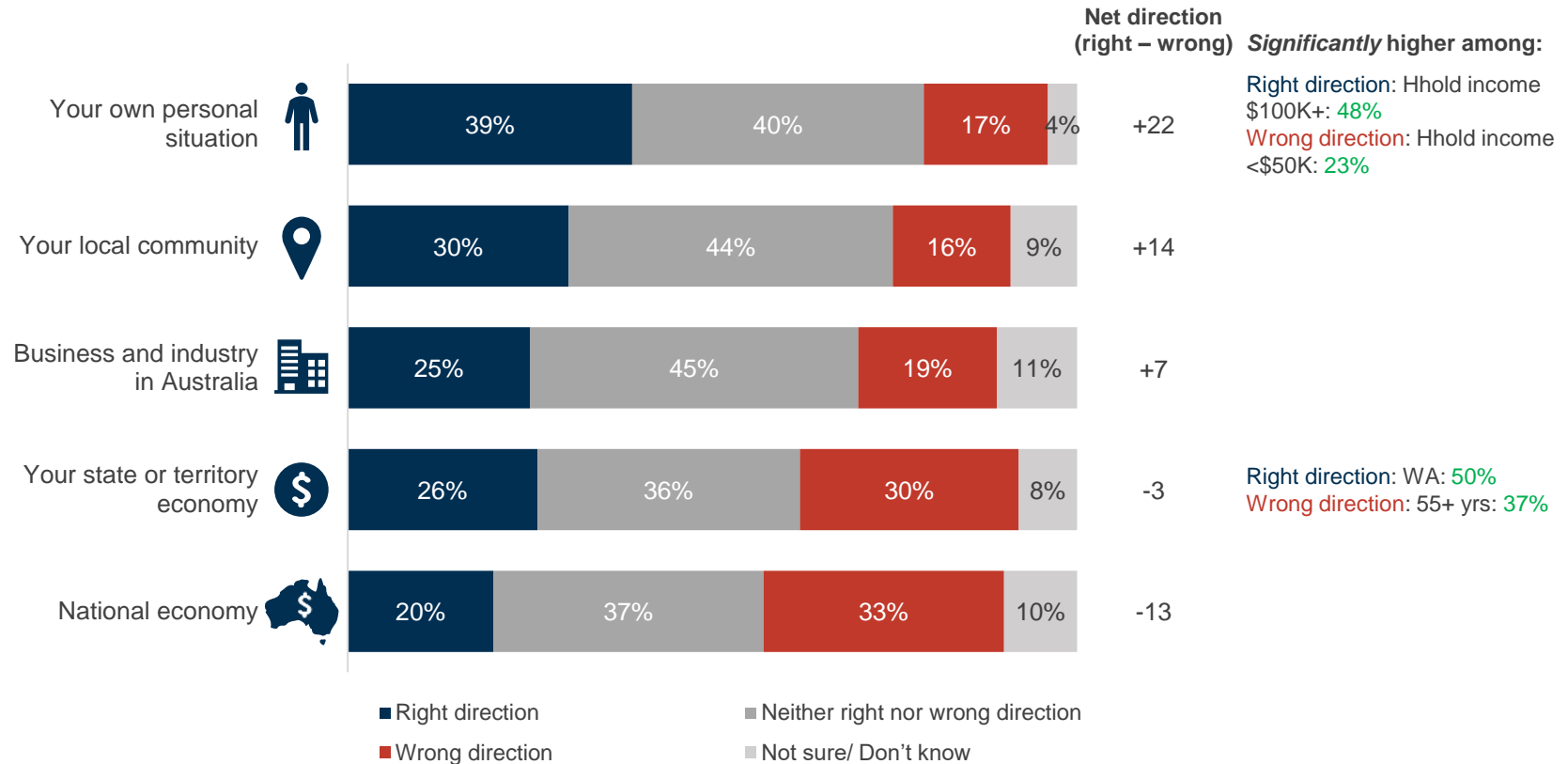
Similarly, more SA residents see their state economy as heading in the right direction (33%) than wrong direction (21%).

However, the eastern states are less optimistic. Around one in three see their state economy as heading in the wrong direction, and fewer see it heading in the right direction (NSW: 32% vs 20%; Victoria: 32% vs 24%, Queensland: 35% vs 23%).

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



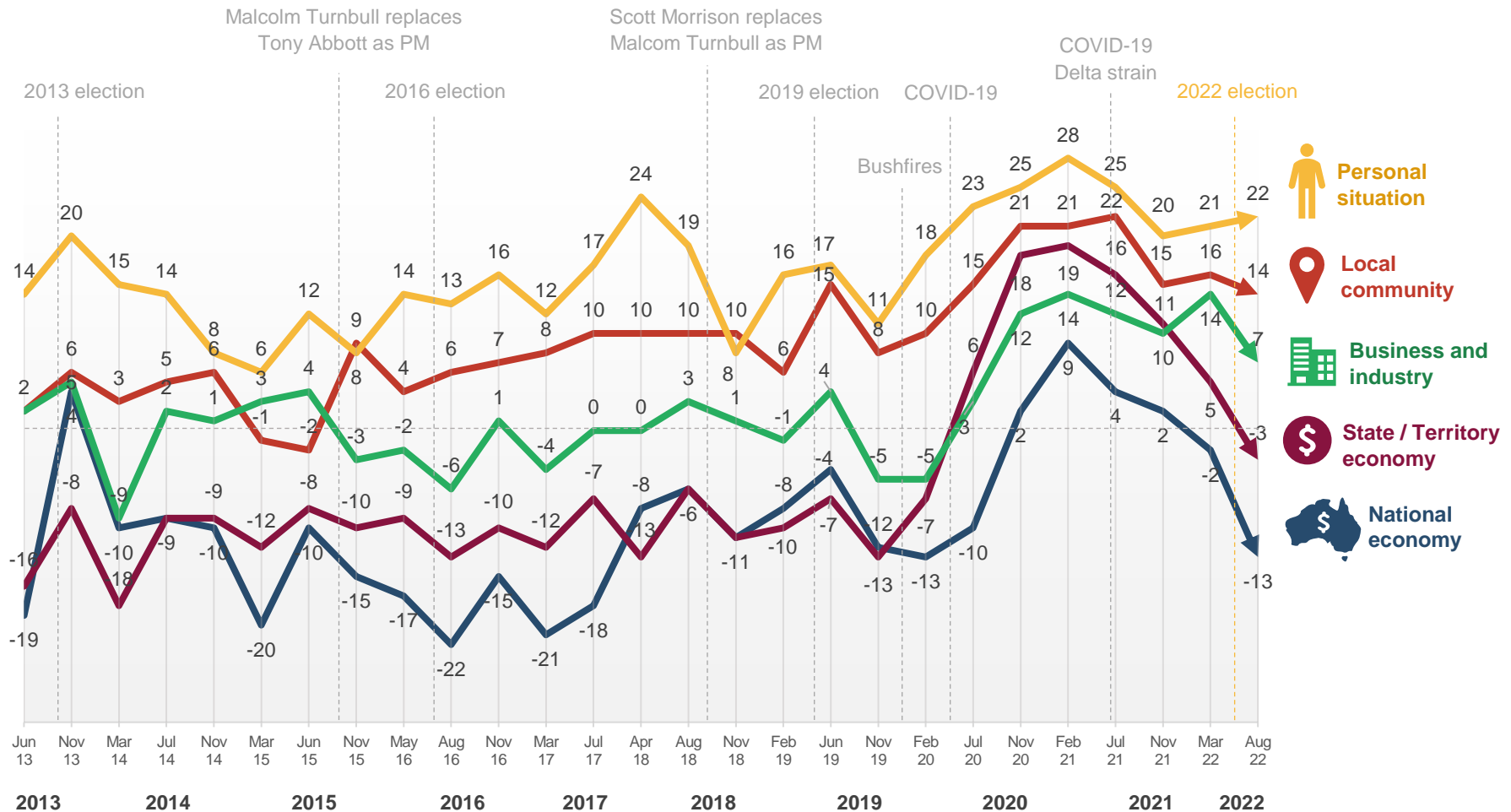
Direction of organisations and groups in Australia



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 / territory economies, and is also down for business and industry

Direction of organisations and groups in Australia
Net direction trend (right direction % - wrong direction %)



How does the Australian Government perform on top issues?

Improved performance on climate change and leadership with the change of Government but still poor on living costs



Almost three months in, the new Albanese Government's performance ratings are substantially improved on its predecessor for the environment and climate change (8 points higher) and vision and leadership (7 points higher).*

However, other key community pressure points remain poorer performers for Federal Government, despite the recent change in Government:

- cost of living (index of 31)
- housing and interest rates (index of 37)
- hospitals, healthcare and ageing (index of 40)
- energy (index of 41)
- the economy and finances (index of 45)
- employment and wages (index of 46).

Regional Australia is most critical of Government performance on hospitals, healthcare and ageing, the economy and employment and wages.

Overall, the Federal Government's best performing areas are around security (terrorism, radicalisation and violent extremism – index of 56, the defence and security of our nation – index of 55) and the COVID-19 pandemic (index of 54).

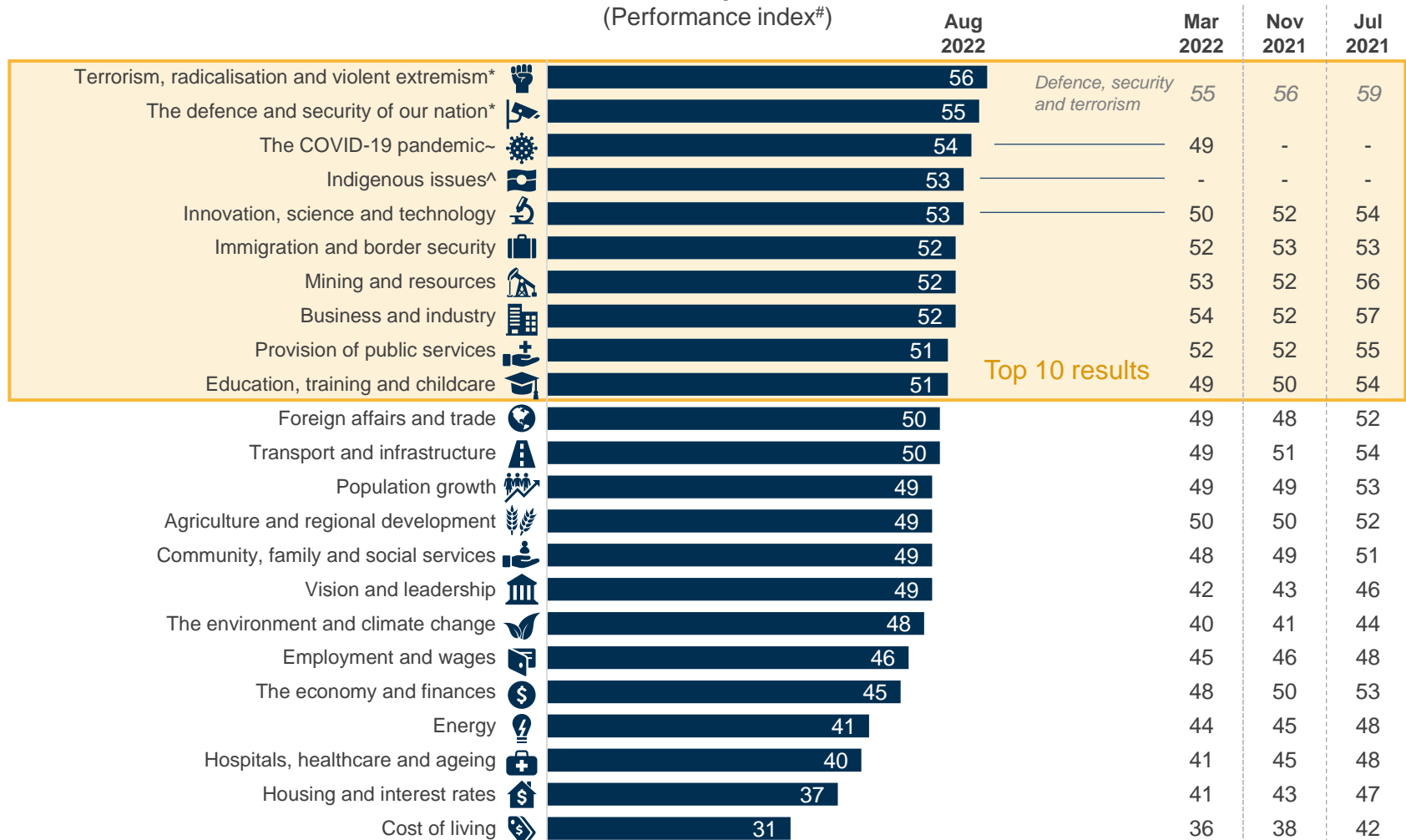
The new Labor Government is also seen as performing well on indigenous issues (index of 53), following its commitment to implementing the Uluru Statement from the Heart in full and the released of its proposed draft change to the constitution to recognise Indigenous Australians with a voice to parliament.

* Survey conducted prior to media coverage of former Prime Minister Scott Morrison's secret appointment to five government ministries.

Performance improves on climate change and leadership under new Government and rates well on Indigenous issues



Australian Government performance on issues (Performance index#)



For an explanation of how index scores are calculated refer to the survey methodology section of this report.

* Added in August 2022, previously 'Defence, security and terrorism'

^ Added in August 2022

~ Added in March 2022

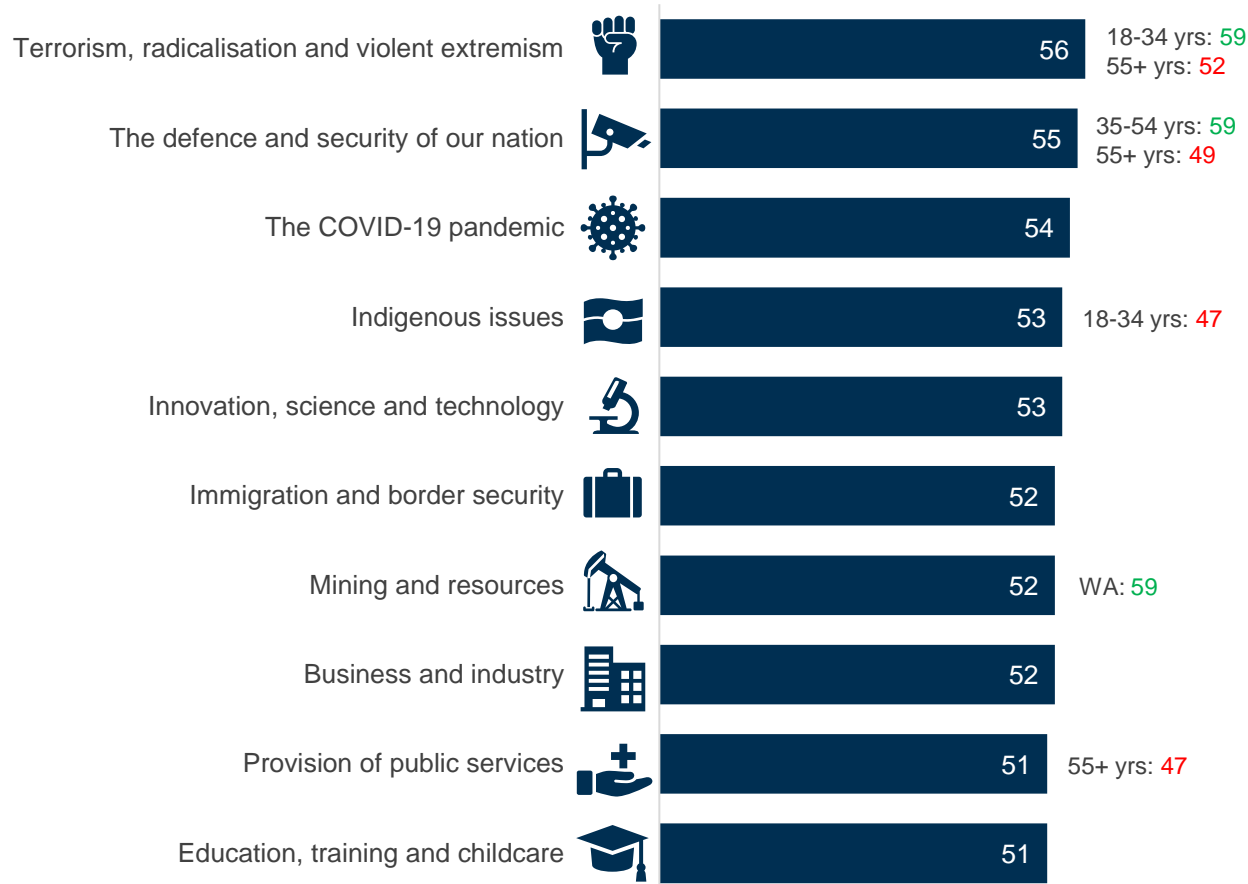
Q. How would you rate the performance of the Australian Government on each of the following issues?

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

Older adults rate Government performance weaker on security issues, young adults weaker on Indigenous issues



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



For an explanation of how index scores are calculated refer to the survey methodology section of this report.

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

Q. How would you rate the performance of the Australian Government on each of the following issues?

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



How are government, business and industry performing?

Positive first performance rating for Albanese Government as State / Territory Government ratings continue to decline



As the new Albanese Government settles into its first Parliamentary term, Australians rate its performance (index of 54) significantly better than the Morrison Government's performance during its final year in office.

The seven-point jump from the Morrison Government's pre-election rating (index of 47 in March 2022) is substantial – but smaller than the ten-point increase recorded after the Abbot Government (index of 44 in November 2013) replaced Gillard's minority Labor Government.

However, by comparison, over the Coalition's last three terms in office, the Abbot, Turnbull and Morrison Governments failed to perform above 'average' (index of 50) until the onset of the COVID-19 pandemic.

Almost four in ten Australians rate the new Federal Government's performance as very good or good (39%) and a similar number rate it as average (40%). Just 19% of adults rate it as very poor or poor, well below the 33% recorded by the Morrison Government heading into the recent election.

The new Federal Government also outperforms its State and Territory counterparts, whose ratings continue their gradual decline back to pre-pandemic levels, falling a further two points since March (index of 52, down from 54).

The WA State Government continues to significantly outperform other states (index of 64), followed by the SA State Government (index of 57).

Performance of State Governments on the east coast is rated 'average' – index score of 50 in each of NSW, Victoria and Queensland. This represents a five-point decline for the Queensland State Government since March.

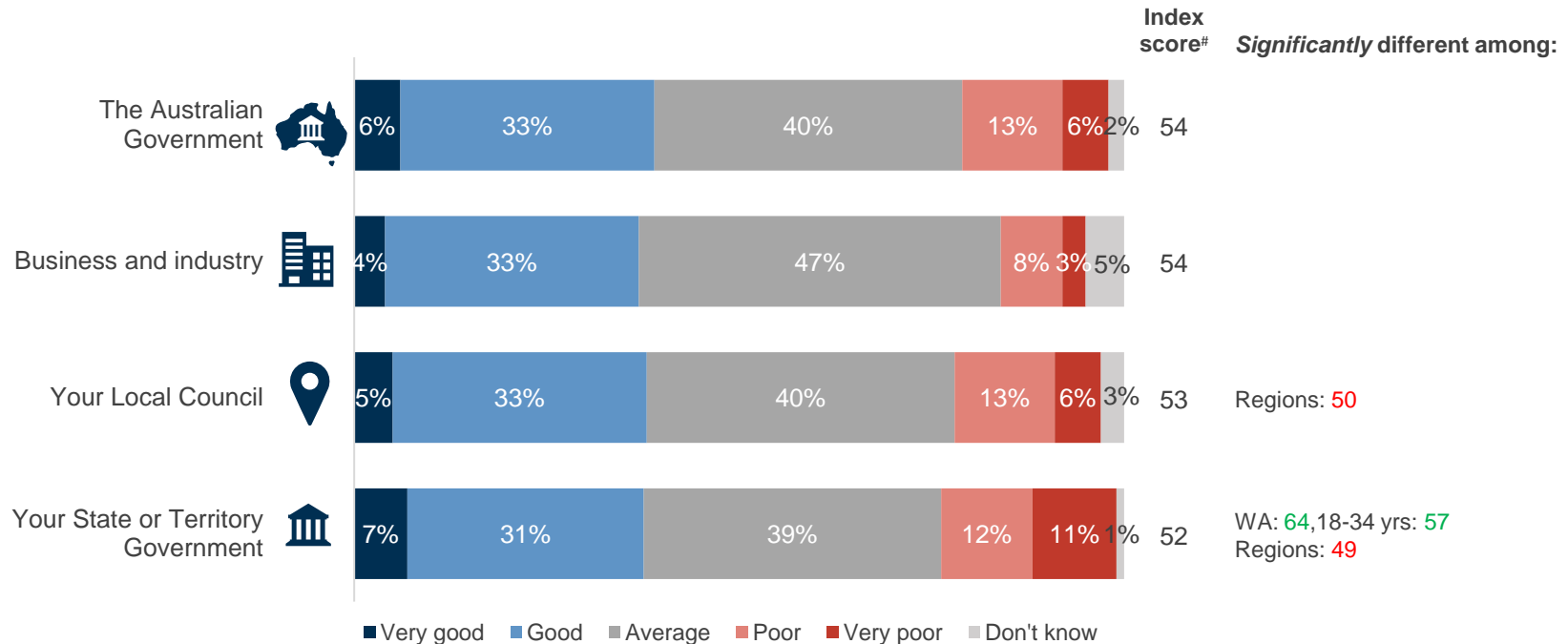
Following a period of stability over 2021, business and industry performance is also seen to be on the decline, (index of 54, down from 56), as the impacts of higher operating costs and continued staff shortages and supply chain disruptions are felt by the wider community.

In contrast, the performance of local councils is slightly improved since March (index of 53, up from 52).

Federal Government and business outperform State / Territory and Local Governments



Performance of organisations and groups in Australia



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.

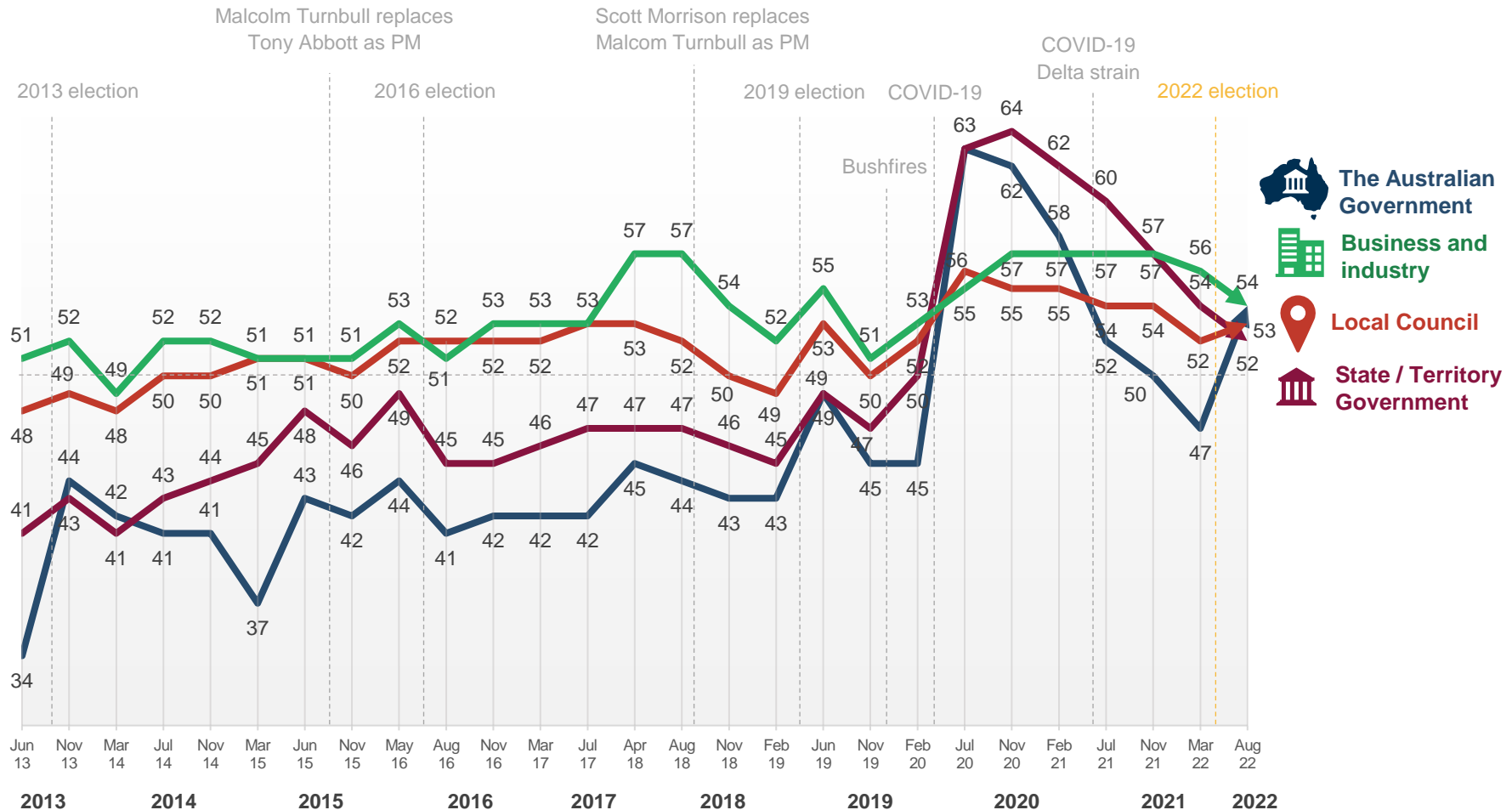
Q. How would you rate the current performance of each of the following organisations or groups in Australia?

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

Federal Government performance sees post-election lift but State / Territory Governments and business decline



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).

THERE ARE OVER 25 MILLION PEOPLE IN AUSTRALIA...

FIND OUT WHAT THEY'RE THINKING.



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