Perceptions of democracy and other political attitudes in Australia: October 2024

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Abstract

This paper examines political attitudes in Australia as captured by the first wave of the 2025 Election Monitoring Survey Series (2025EMSS), conducted in October 2024. Using data from a nationally representative sample of over 3,500 Australians, the study explores satisfaction with democracy, trust in institutions, political attitudes, and voting intentions ahead of the 2025 Federal Election. The findings reveal broad satisfaction with the direction of the country and democracy, particularly among younger and university-educated Australians, contrasted with persistent distrust in key institutions such as federal government and social media. Economic and social factors, including financial stress and loneliness, are strongly associated with political attitudes, with financially stressed individuals and those experiencing loneliness reporting lower satisfaction with democracy and reduced trust in institutions.

1 Introduction and overview

According to the United Nations Development Program (UNDP), 2024 will end up being the 'biggest election year in human history'[1] with close to 4 billion people or over half the world's population voting in local or national elections. The US election, which took place on the 5th of November, received the greatest amount of media coverage, and with the re-election of Donald Trump arguably will have the largest impact on global affairs. However, elections also took place in India, Indonesia, Taiwan, France, Mexico, Japan, Russia, the UK, and for the EU Parliament.

Although four of Australia's eight sub-national jurisdictions had an election in 2024, the two most important contemporaneous votes have and will bracket 2024. These are the October 2023 Referendum on an Aboriginal and Torres Strait Islander Voice to Parliament, and the 2025 Federal Election, scheduled to take place no later than May of that year. The October 2023 Referendum led to a resounding 'No' vote with only 39.9 per cent of legal votes in favour of the change and analysis of detailed survey data suggesting that 'Australians voted no because they didn't want division and remain sceptical of rights for some Australians that are not held by others' (Biddle et al. 2023).

The 2025 Federal Election looks like being extremely close. At the time of writing, the most recent Newspoll (conducted on the 13th of October)[2] had the Opposition Liberal/National Coalition ahead 51-49 on two-party preferred voting, with a 38 per cent primary vote for the Coalition, 31 per cent for the Labor Government, 13 per cent for the Greens, and the remaining 18 per cent spread across other parties.

Although the polls in Australia suggest a close election in 2025, there is no indication that there will be major contestation regarding the result. Similarly, the Australian Electoral Commission reported a little over a month after voting had closed that "'Electoral Integrity Assurance Taskforce (EIAT) agencies did not identify any foreign interference, or any other interference, that compromised the delivery of the 2023 referendum and would undermine the confidence of the Australian people in the results of the referendum.'[3]

The same level of confidence in the Australian electoral system cannot be applied to many of the elections that took place across the world in 2024. For example, while there is no evidence to suggest that the US election result was impacted by any form of voter fraud, credible survey results from pre[4] and post[5] election suggest that a sizable minority of American voters thought that enough fraud would or did take place to alter the outcome.

Although Australia continues to enjoy a relatively robust and resilient democracy, there remains significant pockets of discontent, and areas in need of considered improvement. The long-running Australian Election Study (AES) asks respondents for their views on parties and the system in general immediately after every election. The survey shows that the level of satisfaction with democracy in Australia just after the May 2022 election was very close to the average of the last 25 or so years, and within the standard error of values observed at the time of the 1998, 2001, 2010, and 2013 elections (Cameron and McAllister 2022). Still, there were around 30 per cent of voters after the 2022 election that were not satisfied with democracy, 70 per cent who think that people in government look after themselves, and 54 per cent that think government is run for a few big interests.

As Australia looks across the world in this 'biggest election year in human history,' reflects on the meaning of the referendum loss, and prepares for a very closely fought Federal election, it is an important time to consider perceptions of the Australian public towards democracy, institutions, and political parties. In response, the School of Politics and International Relations (SPIR) at the Australian National University (ANU) partnered with POLIS: The Centre for Social Policy Research (also at the ANU) to undertake a multi-wave data collection project to track views and attitudes leading up to and following the election. This paper is the first output from this collaboration, reporting on survey results from a broadly representative sample of Australian adults as of mid-late October, 2024, that we are referring to as the 2025 Election Monitoring Survey Series (2025EMSS).

Data was collected in partnership with the Online Research Unit (ORU) through their Australian Consumer Panel. The ACP is Australia's most academically rigorous, non-probability panel,[6] and from this panel we collected data on 3,622 Australians on the attitudes and beliefs towards democracy, their past voting behaviour and future intentions, and a range of related data items. We mostly utilised questions from other ANU surveys, including the Australian Election Study and ANUpoll. However, given slightly different ample selection processes, we are cautious in making strong and precise claims about trends and comparisons with other surveys.

The data will be available for download through the Australian Data Archive and is described in more detail in the appendix to this paper. All results presented in this paper are weighted to population benchmarks based on age, sex, education, and current employment.

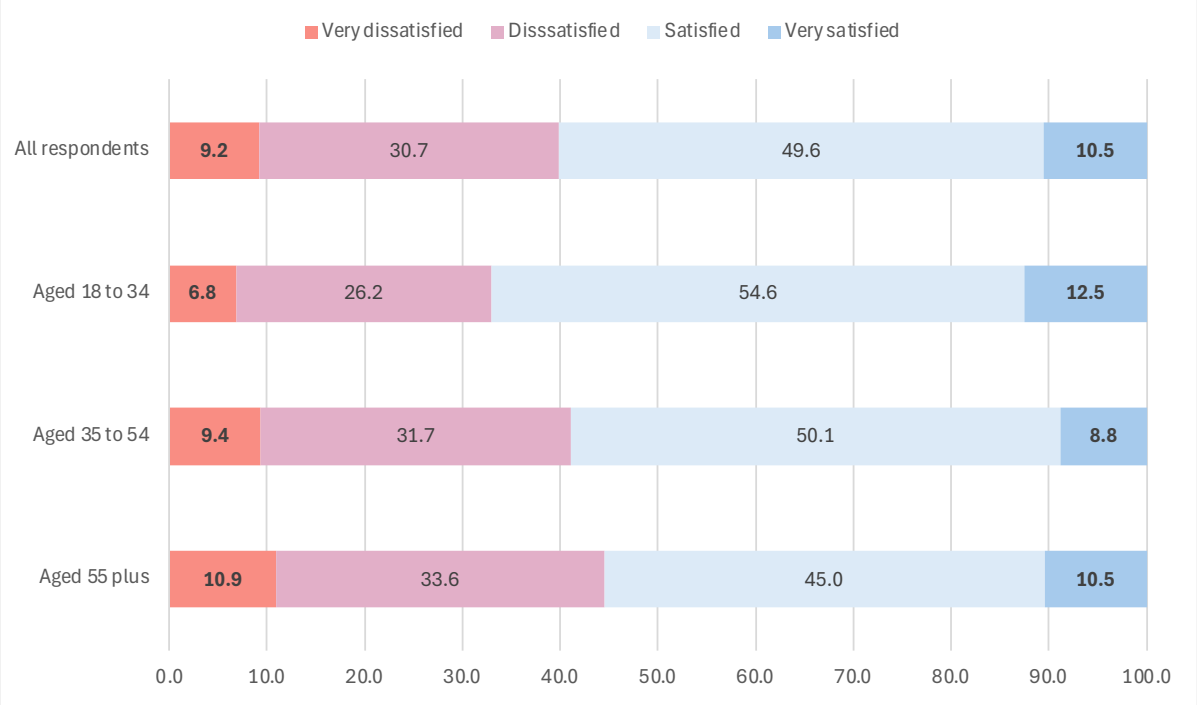
With this aim in mind, the remainder of the paper is structured as follows. Section 2 looks in detail at people's satisfaction levels, in terms of both democracy and more broadly the direction of the country. We then turn to confidence and trust in institutions (Section 3) with Section 4 looking at a broader set of political attitudes. In Section 5 we look at views towards political parties and leaders, with a particular focus on how those views relate to the political attitude and other measures that were covered in Sections 2 through to 4. In Section 6, we look at two potential determinants of political attitudes – financial stress and loneliness. In the final section of results (Section 7) we see how these views relate to voting intentions. The final section in the paper (Section 8) provides a summary of the main findings from Wave 1 of the 2025EMSS, and gives an overview of future data collection plans.

2 Satisfaction with democracy and the direction of the country

After a few demographic questions used for sampling purposes, respondents to Wave 1 of the 2025EMSS were asked 'Firstly, a general question about your views on living in Australia. All things considered, are you satisfied or dissatisfied with the way the country is heading?' Figure 1 shows that more Australians are satisfied with the direction of the country (49.6 per cent satisfied and 10.5 per cent very satisfied) than dissatisfied (30.7 per cent dissatisfied and 9.2 per cent very dissatisfied) with the direction of the country.

Figure 1 also shows that younger Australians (aged 18 to 34 years) are also more likely to be satisfied with the direction of the country than those in the middle part of the age distribution (35 to 54 years) and particularly older Australians (aged 55 years and over). Using a binary measure, 67.0 per cent of younger Australians are satisfied or very satisfied, compared to 58.9 per cent of those in the middle part of the age distribution, and 55.5 per cent of older Australians.

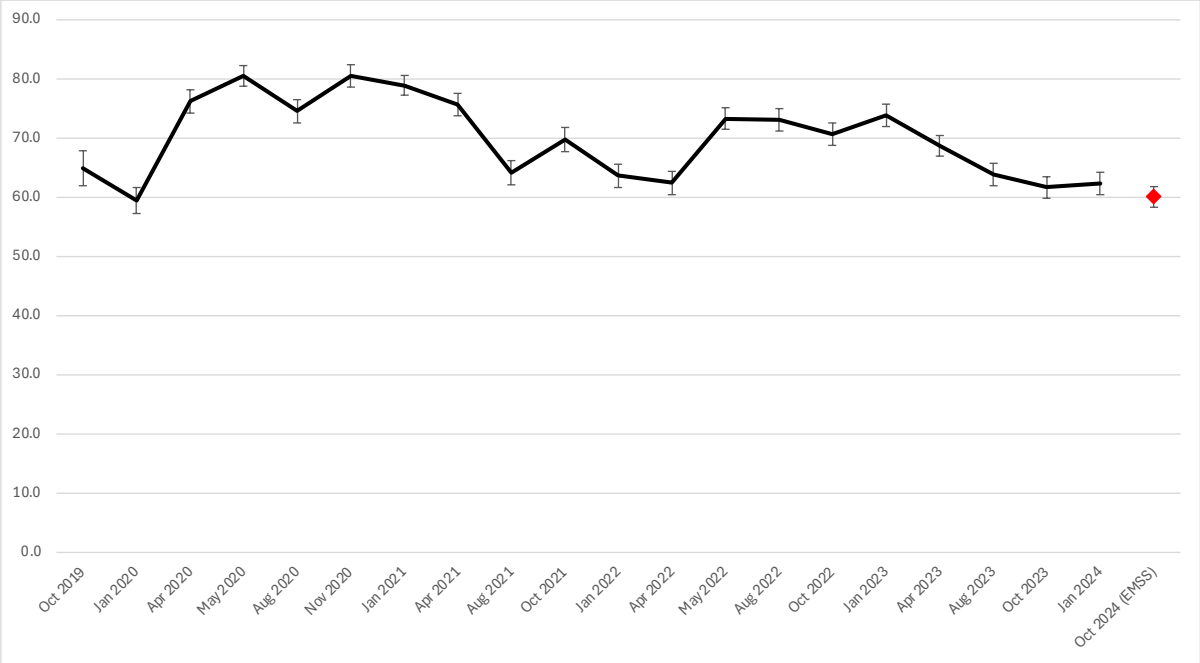
Figure 1 Satisfaction with the direction of the country, all Australians and by age, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Although the October 2024 survey was the first wave of data collection for the 2025EMSS, the sample and questionnaire were designed to be comparable to the long running ANUpoll series of surveys,[7] collected since 2017 on the Life in Australia panel.[8] Figure 2 shows that since just prior to the COVID-19 pandemic, satisfaction with the direction of the country has fluctuated, but since around the middle of 2023 has stayed reasonably stable at just over six-in-ten Australians being satisfied with the direction of the country.

Figure 2 Satisfaction with the direction of the country, all Australians, October 2019 to October 2024

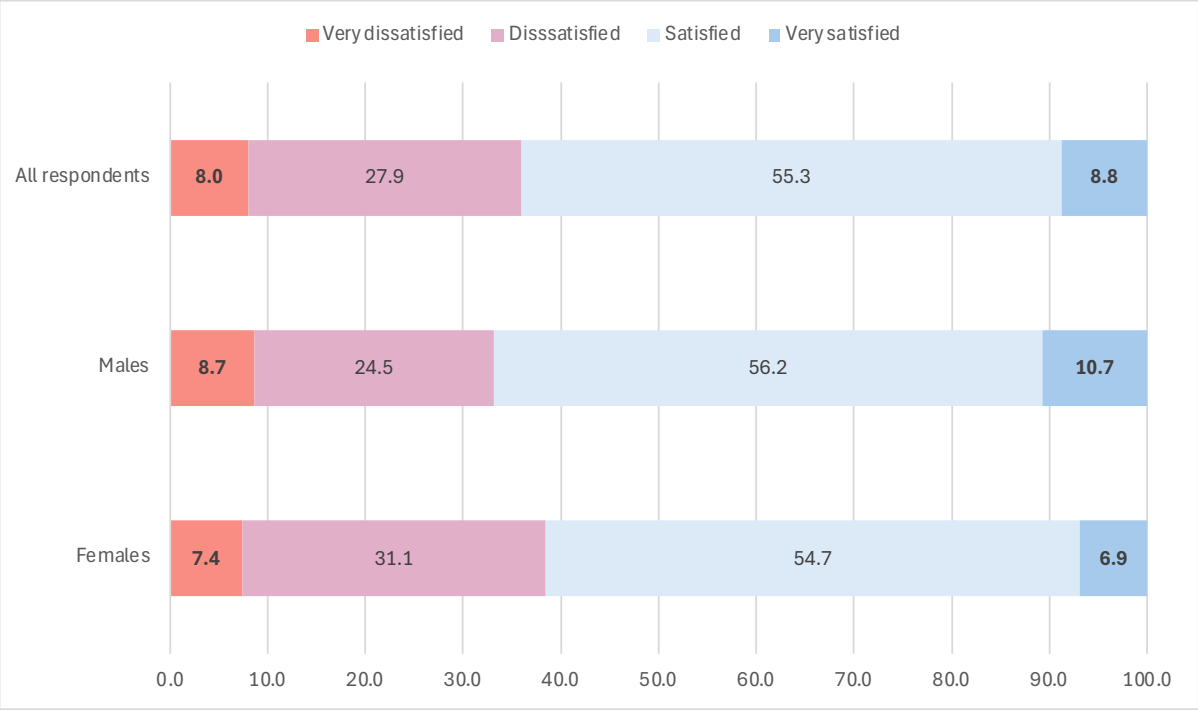


Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: ANUpoll (October 2019 to January 2024) and Wave 1 of the 2025 Election Monitoring Survey Series (October 2024)

Later in Wave 1 of the 2025EMSS, respondents were asked 'On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Australia?' This is a very similar question to that which is asked in the AES mentioned earlier. As shown in Figure 3, Australians are far more likely to be satisfied (55.3 per cent satisfied, 8.8 per cent very satisfied) than dissatisfied (27.9 per cent dissatisfied, 8.8 per cent very dissatisfied). Interestingly though, differences in satisfaction with democracy are greater by sex than age. Combined, 66.9 per cent of males were satisfied/very satisfied compared to only 61.5 per cent of females. While statistically significant, the biggest difference is actually at the extremes of the distribution, with males also slightly more likely to be very dissatisfied (9.5 per cent) than females (7.9 per cent).

Figure 3 Satisfaction with democracy, all Australians and by sex, October 2024



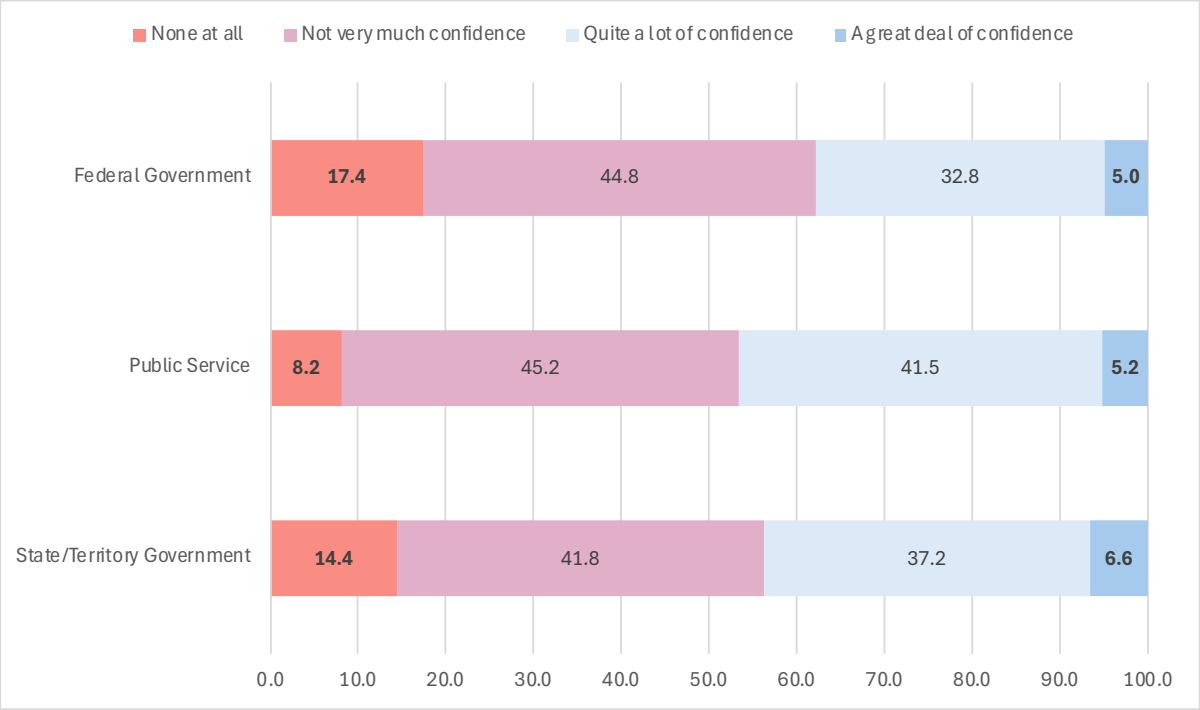
Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

There are also quite large differences in satisfaction with democracy by education. Only 60.1 per cent of those that have not completed Year 12 are satisfied/very satisfied with democracy. This rises to 62.6 per cent for those who have completed Year 12 but do not have a degree, and even further to 69.2 per cent of those with a degree.

3 Confidence and trust in institutions

Although Australians are generally satisfied with the direction of the country in general, and democracy specifically, trust in key institutions in Australia remains low. At the start of the 2025EMSS, respondents were asked for their confidence in the Federal Government, the Public Service, and the State/Territory government in the jurisdiction in which they live. Figure 4 shows that of these three key institutions, the public service and state/territory governments have the greatest level of confidence, with less confidence in the Federal government

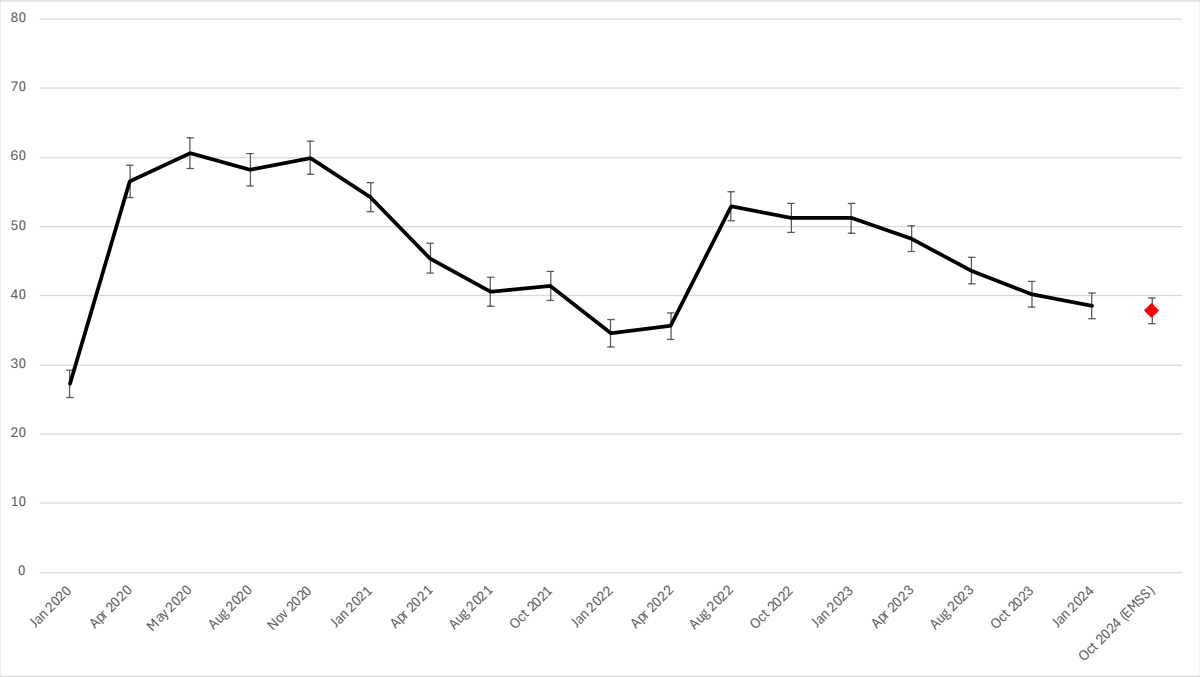
Figure 4 Confidence in institutions, all Australians, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Comparing 2025EMSS data with time series data from the ANUpoll, we can see that confidence in the Federal Government appears to be at a reasonably low value over the medium term. It is true that confidence in the Federal Government is now higher than it was in the last few months of the Morrison government (January and April 2022) as well as the Black Summer Bushfires (January 2020), however confidence is lower than not only the COVID-19 peak in April-November 2020, but also the relatively high level of confidence seen just after the election of the Albanese government.

Figure 5 Confidence in the Federal Government, all Australians, January 2020 to October 2024

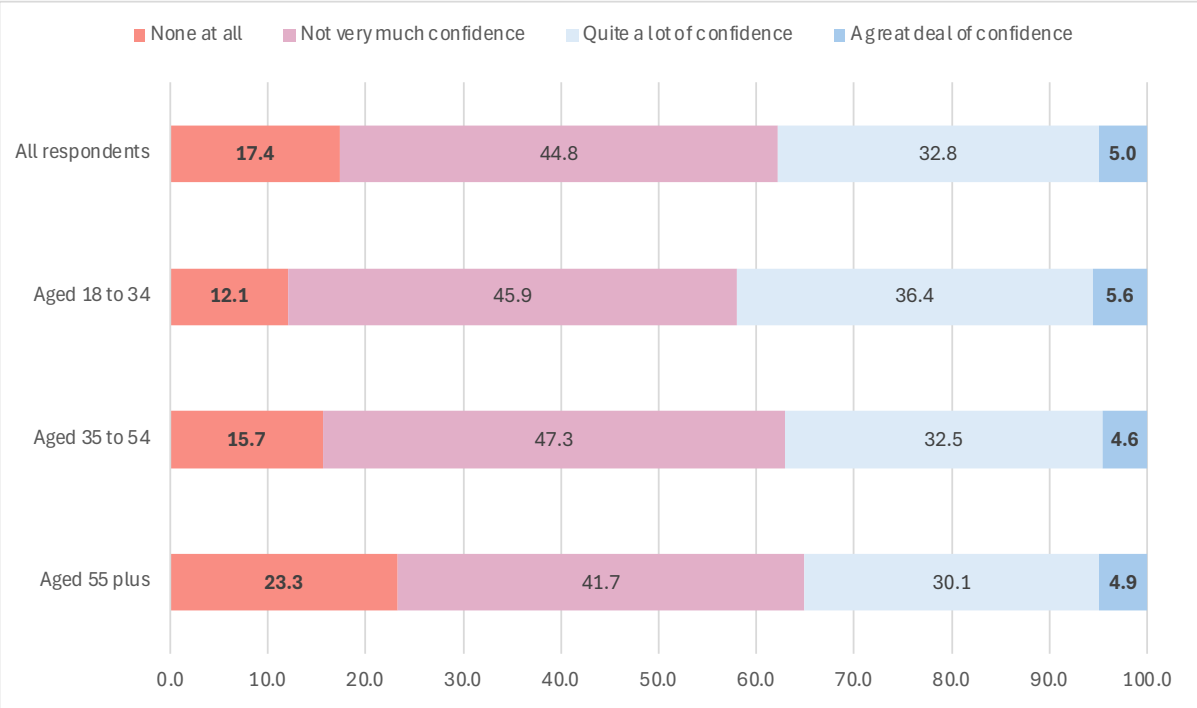


Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: ANUpoll (January 2020 to January 2024) and Wave 1 of the 2025 Election Monitoring Survey Series (October 2024)

Age is again a strong predictor of confidence (Figure 6), at least in terms of the confidence in the Federal Government. Amongst those aged 18 to 34 years, 47.0 per cent have quite a lot or a great deal of confidence in the Federal Government. This falls to 42.5 per cent for those aged 35 to 54, and 35.1 per cent for those aged 55 years and over.

Figure 6 Confidence in the Federal Government, all Australians and by age, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

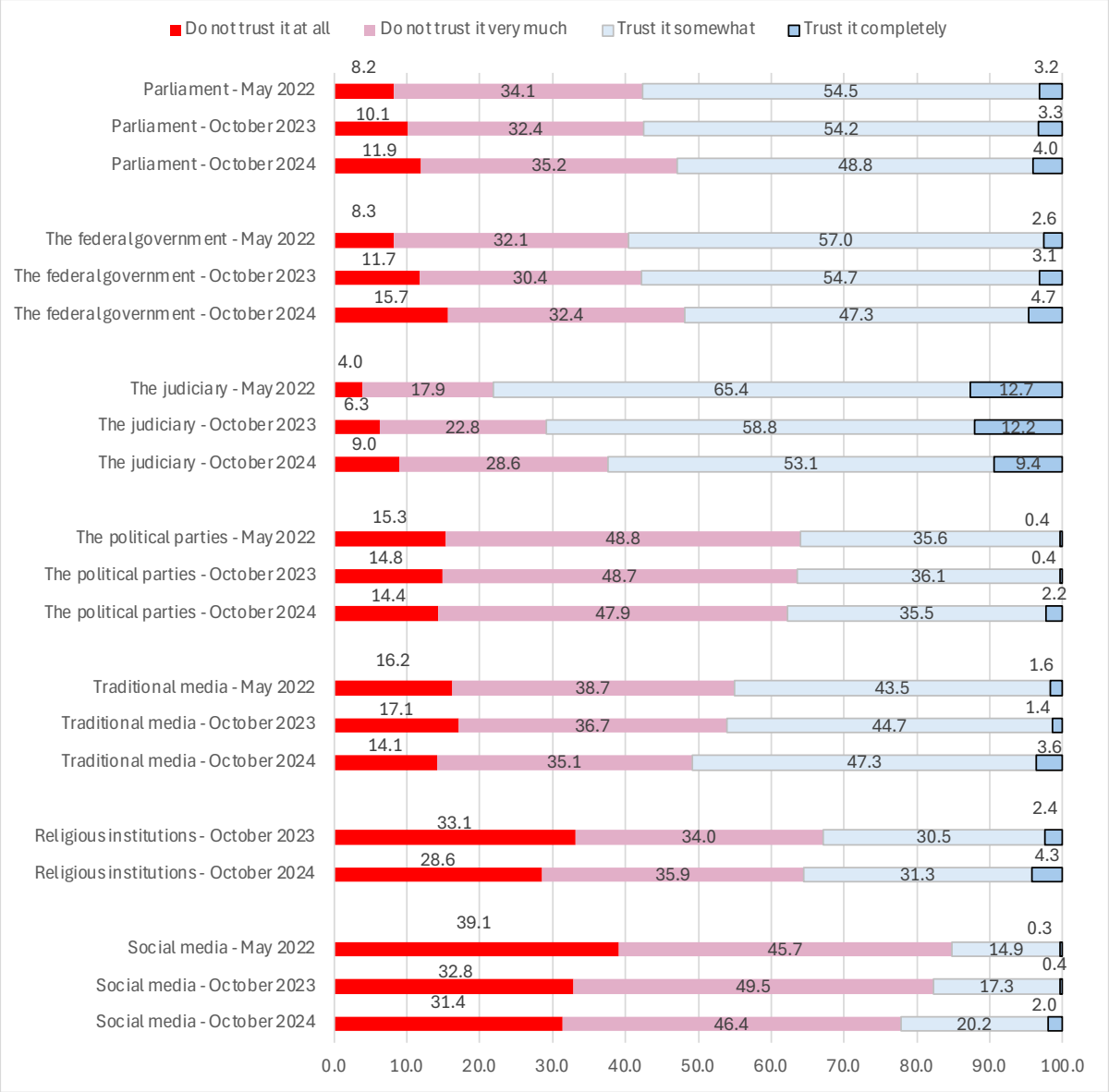
There were a number of other demographic characteristics that were associated with confidence in the federal government. Using the same binary measure (quite a lot and a great deal of confidence combined), we find that females (41.8 per cent) have less confidence than males (46.0 per cent). In addition, those with a degree (51.7 per cent) have much more confidence than those without that have nonetheless completed Year 12 (42.3 per cent) and particularly those that have not completed Year 12 (35.9 per cent). There are also large differences between those that were born overseas (49.5 per cent) and those born in Australia (42.0 per cent).

In addition to confidence in government, in October 2024 we asked respondents about their level of trust in seven important institutions, with four possible response options – Do not trust it at all; Do not trust it very much; Trust it somewhat; and Trust it completely. For the ANUpoll series of surveys, we asked about all these institutions in October 2023 just after the failed Constitutional Referendum, as well six of these institutions in May 2022 just after the most recent Federal Election.

Figure 7 shows that the most trusted institution in Australia (of the seven asked about in October 2024) is the judiciary, with 62.5 per cent of Australians saying that they trust it somewhat or trust it completely. However, the judiciary is the only institution that experienced a statistically significant (and substantial) decline in trust from just after the 2022 federal election to just after the referendum (down from 78.2 per cent in May 2022 and down again from 70.9 per cent in October 2023).

However, the largest relative increase is in Social Media, increasing from a very low 17.7 per cent in 2023 to a slightly more respectable 22.2 per cent in 2024. This is still the lowest level of trust amongst all institutions, but there has been some convergence with the other institutions.

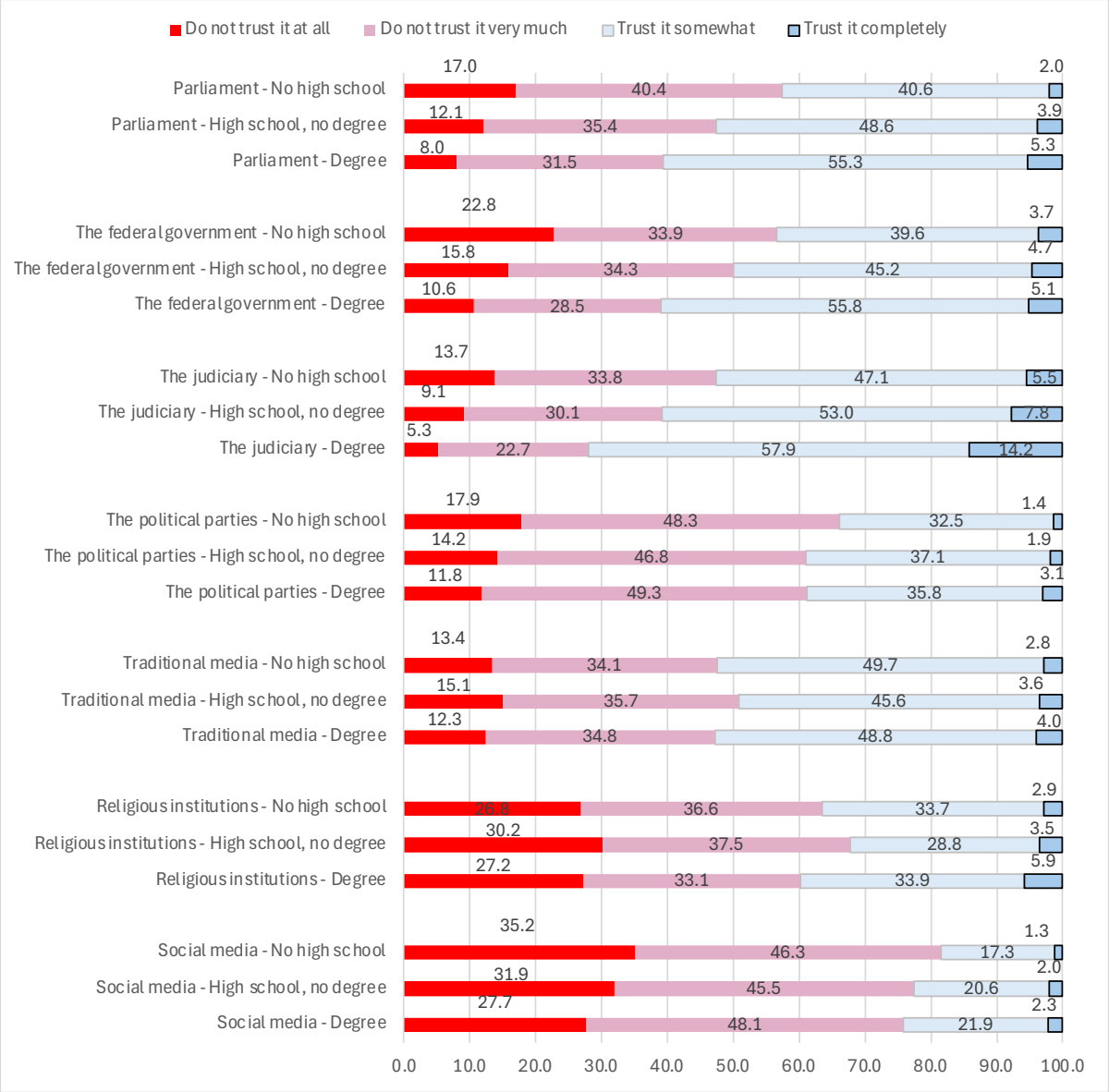
Figure 7 Level of trust in key institutions, May 2022, October 2023, and October 2024



Source: May 2022 Comparative Study of Electoral Systems/ANUpoll, October 2023 Australian Constitutional Referendum Survey/ANUpoll, October 2024 Wave 1 of the 2025EMSS

There is some important variation in trust across demographic groups. For the most part, and really only excluding trust in social media, those with relatively high levels of education are more likely to trust key institutions than those with relatively low levels. The biggest relative difference is trust with regards to Parliament. Amongst those with at least a Bachelor Degree, 61.0 per cent of Australians trust Parliament somewhat or completely. This drops to 52.5 per cent amongst those that have completed Year 12 but do not have a degree, and even further to 42.6 per cent amongst those that have not completed Year 12. Across developed countries, we are witnessing a real divide emerging by education in terms of political attitudes (Hooghe et al, 2015, Le and Nguyen 2021). There is a risk that if trust in our main decision-making body continues to diverge, then those with relatively low education levels are going to increasingly look outside the system for their political support.

Figure 8 Level of trust in key institutions, by education, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

In terms of trust in social media, there are only very small differences by education. The biggest difference is by age. For the young, there is a relatively high level of trust, with 40.0 per cent and 30.6 per cent of those 18 to 24 and 25 to 34 years old respectively trusting somewhat or completely. This is somewhat larger than the broad middle part of the age distribution, with the binary trust in social media measure 22.8 per cent for those aged 35 to 44, 21.5 per cent for those aged 45 to 54, and 16.5 per cent for those aged 55 to 64. Beyond this age, trust declines substantially. Only 12.1 per cent of those aged 65 to 74 trust social media, declining to 7.8 per cent for those aged 75 and over.

4 Political attitudes

4.1 Left-right spectrum

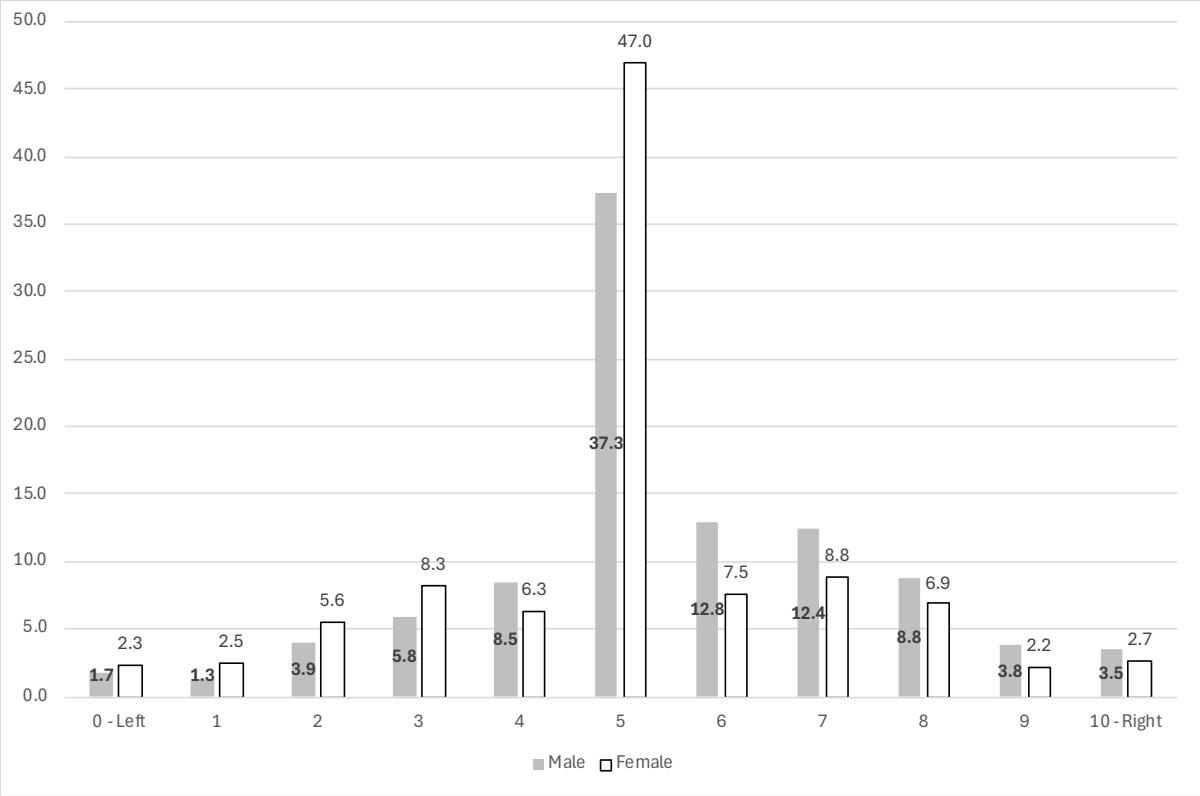
Historically, the meaning of left-wing and right-wing in political orientation has been reasonably well understood within a country or system. Although the specific policy positions have varied through time and across settings since the introduction of the terminology in response to spatial location in the National Assembly during the French Revolution of 1789, there has been a general framing of those on the left tending to have more interventionist views with regards to the economy and a relaxing of social rules and hierarchy, whereas those on the right tending to support notions of tradition, duty, and hierarchy. There are times, however, where what are considered to be left-wing and right-wing positions change, or at the very least the political parties that take those positions shift.

In Wave 1 of the 2025EMSS, respondents were asked 'In politics people sometimes talk of "left" and "right". Where would you place yourself on a scale from 0 to 10, where 0 means the left and 10 means the right?' Based on these responses, the average value for all Australians was 5.29, and we estimate that more than two-in-five Australians (41.9 per cent) consider themselves to be neither left nor right, giving a value of 5. Of the remaining approximately three-in-five Australians, 23.3 per cent gave a value of 0 to 4 (left-wing) whereas 34.8 per cent gave a value of 6 to 10 (right-wing).

There are some differences in left/right position by age, particularly at the very upper end of the age distribution. The average value for those aged 75 years and over was 5.81. Those aged 35 to 74 had similar values as each other and where not significantly different from the national average, whereas those aged 18 to 24 had an average value of 4.97 and those aged 25 to 34 had an average value of 5.11. There were more differences, however, by sex and education.

Figure 9 gives the distribution of responses by sex. The average value for males is 5.51 whereas for females it is 5.07, and Figure 9 confirms that there are a higher per cent of males in the 6 to 10 range categories (right-wing) and generally more females in the 0-4 range (left-wing). The larger difference though, is for those in the very middle of the distribution. Almost one-half of females (47.0 per cent) gave a value of 5 on the 0 to 10 scale, roughly ten percentage-points more than the 37.3 per cent of males that give the centre value.

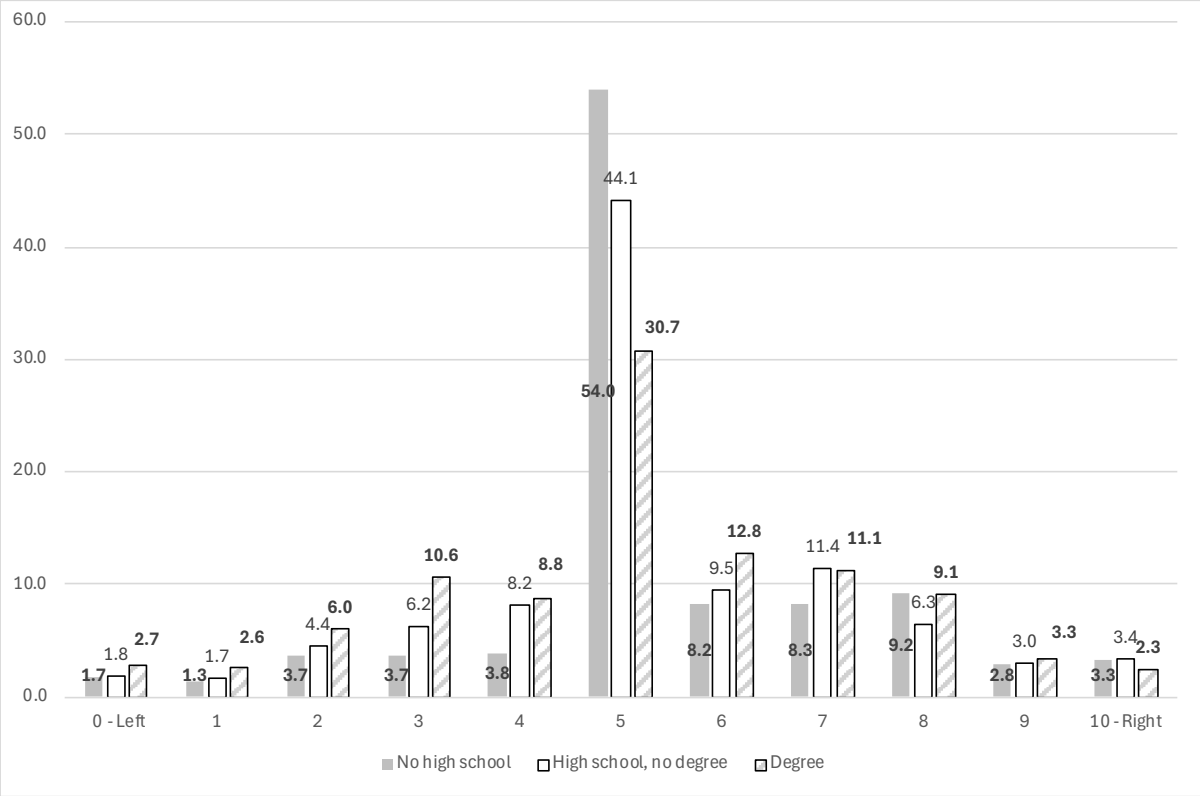
Figure 9 Distribution of responses to self-reported position on left/right spectrum, by sex, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

By education, there are differences in left/right positioning between those who have completed Year 12 (average value of 5.31 without a degree and 5.15 with a degree) and those that have not completed Year 12 (average value of 5.44). Figure 10 shows that the per cent of the groups that position themselves in the centre of the distribution is the main factor in explaining this difference. Indeed, despite having a lower average value, there is a slightly higher per cent of people that have completed high school that are towards the right of the distribution (38.7 per cent) compared to those that have not completed high school (31.7 per cent). Instead, the reason for a higher average value for the non-high school completers is the very high number (54.0 per cent) that gave a value of 5 relative to high school completers (30.7 per cent for those with a degree, 44.1 per cent for those without). This means that there is a very low proportion to the left of the distribution (14.3 compared to 22.3 and 30.7 per cent).

Figure 10 Distribution of responses to self-reported position on left/right spectrum, by education completion, October 2024



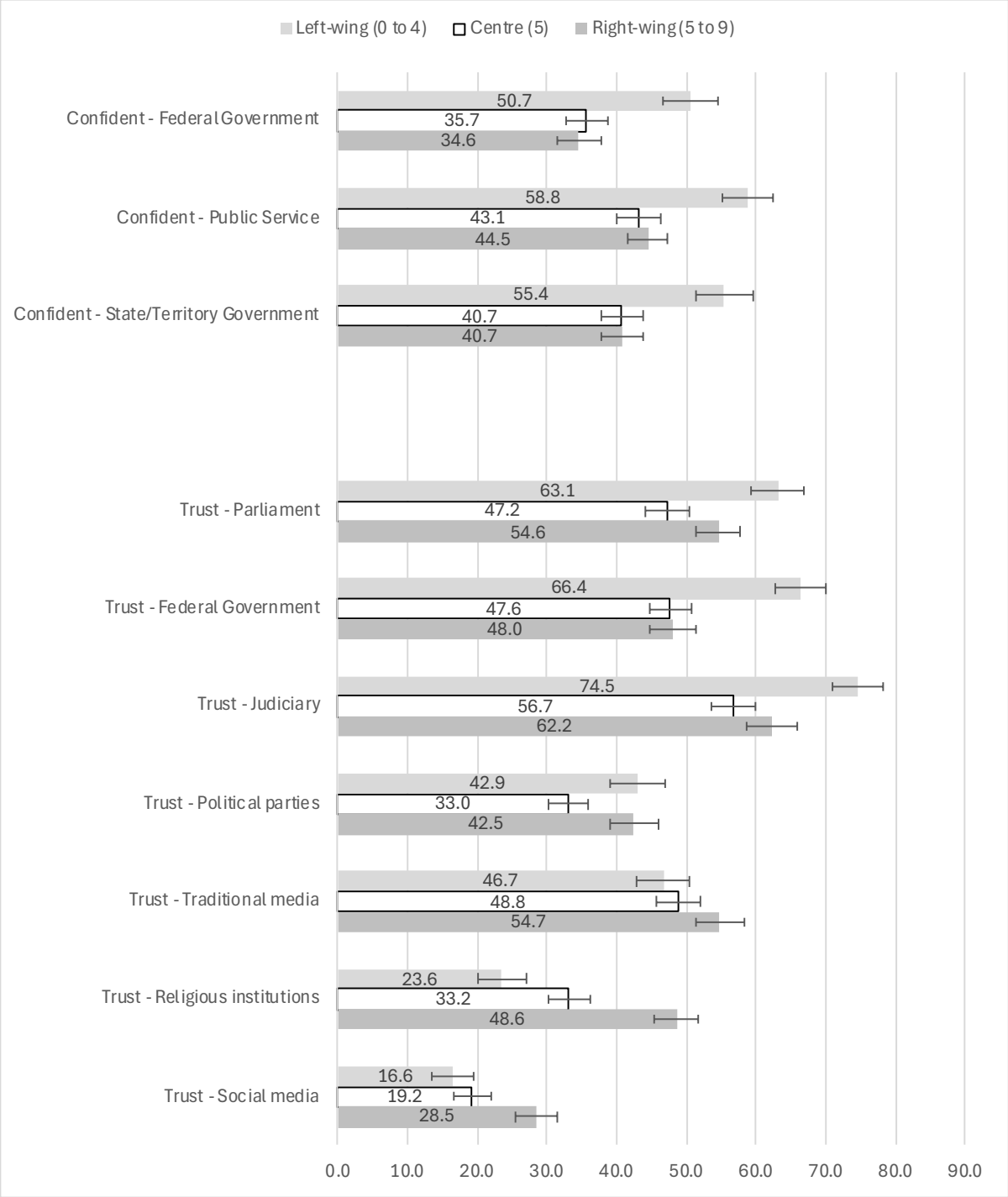
Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

We can start to see some of the relationships that exist between political and other attitudes, by considering satisfaction with democracy and confidence/trust in key institutions across the left/right distribution. Looking first at satisfaction with democracy, those who identify as being in the centre are the least likely to say that they are satisfied or very satisfied with democracy (60.8 per cent). Those on the left are the most satisfied (69.8 per cent), with those on the right somewhere in between (65.2 per cent).

Focusing next on our main confidence measure, Figure 11 shows that amongst those that gave a value of 0 to 4 on the political spectrum (left-wing), more than half (50.7 per cent) had quite a lot or a great deal of confidence in the Federal Government. This was not only much more confidence than those who gave a value of 5 to 10 (right-wing) with 34.6 per cent, but also those who positioned themselves in the centre, with only 34.6 per cent of those with a value of 5 on the left/right scale reporting that they were confident in the federal government.

At the time of this particular survey, the Albanese-led Labor Party was in charge at the Federal-level. It is not surprising then that those who see themselves as more left-wing were more confident in the Federal Government. It is interesting then that there were three institutions that those who self-identified as being right-wing were more trusting of than those self-identified as left-wing – traditional media, religious institutions, and social media. What is perhaps most interesting from Figure 11, however, is that the least confident or trusting was often those who placed themselves right in the middle of the spectrum. This is particularly the case when it comes to views towards Parliament in general, the judiciary and political parties.

Figure 11 Level of confidence or trust in key institutions, by left-right position, October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

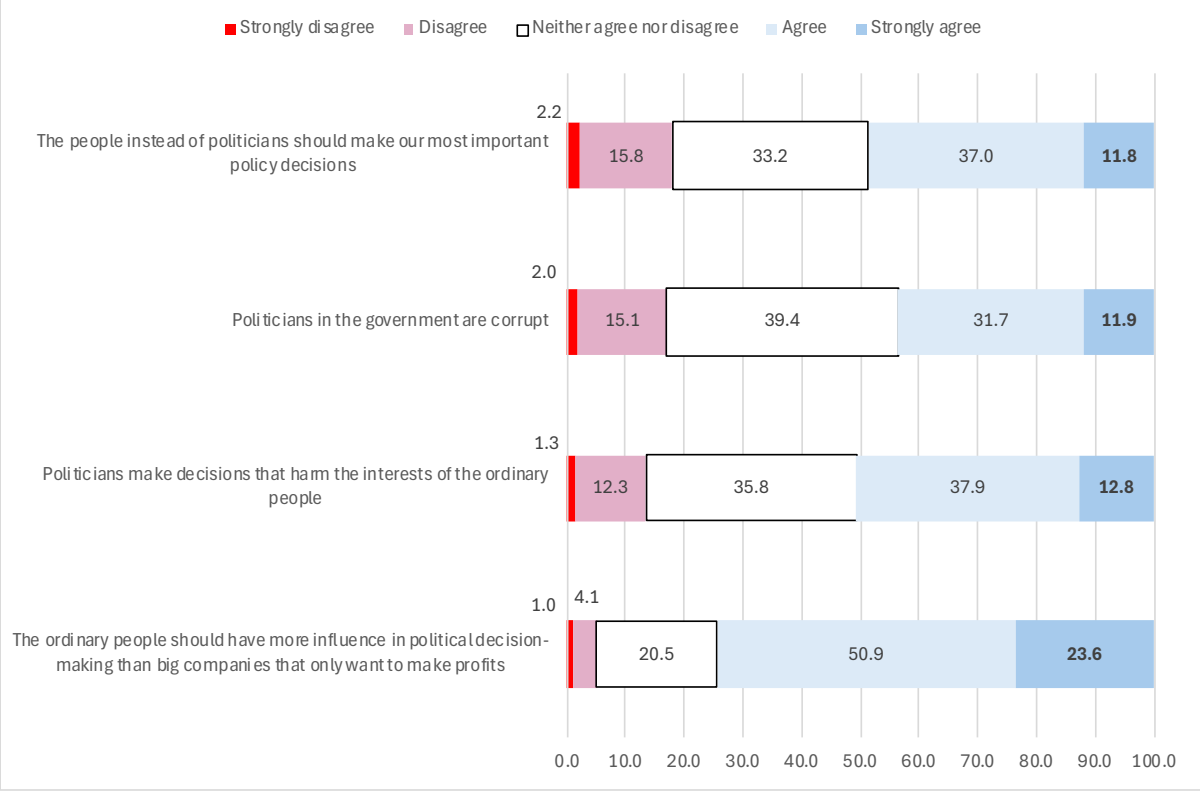
Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

4.2 Views on politicians

While the left-right spectrum continues to have predictive power on political and policy attitudes, recent elections across the world suggest that views towards the so-called

elite and the political establishment are becoming even more relevant (Kertzer 2022). Respondents to Wave 1 of the 2025 EMSS were asked the extent to which they agree or disagree with four statements, taken from the Australian Election Study. Figure 12 shows that in the lead up to the 2025 Federal Election, Australians are far more likely to agree than disagree with each of the four statements, with the strongest agreement being for the notion that 'The ordinary people should have more influence in political decision-making than big companies that only want to make profits.'

Figure 12 General views on politicians, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Negative views towards politicians appear to be influenced by age and education. Interestingly, the most negative views appear to be held by those in the middle part of the age distribution, with more positive views amongst those aged 18 to 24 years, and those aged 55 years and over in particular. This is most obvious with regards to the question on perceived corruption. Amongst those aged 25 to 54 years, almost exactly half (50.0 per cent) agree or strongly agree that politicians in the government are corrupt. This is a little lower amongst those aged 18 to 24 years (44.7 per cent), but is substantially lower amongst those aged 55 years and over (34.1 per cent).

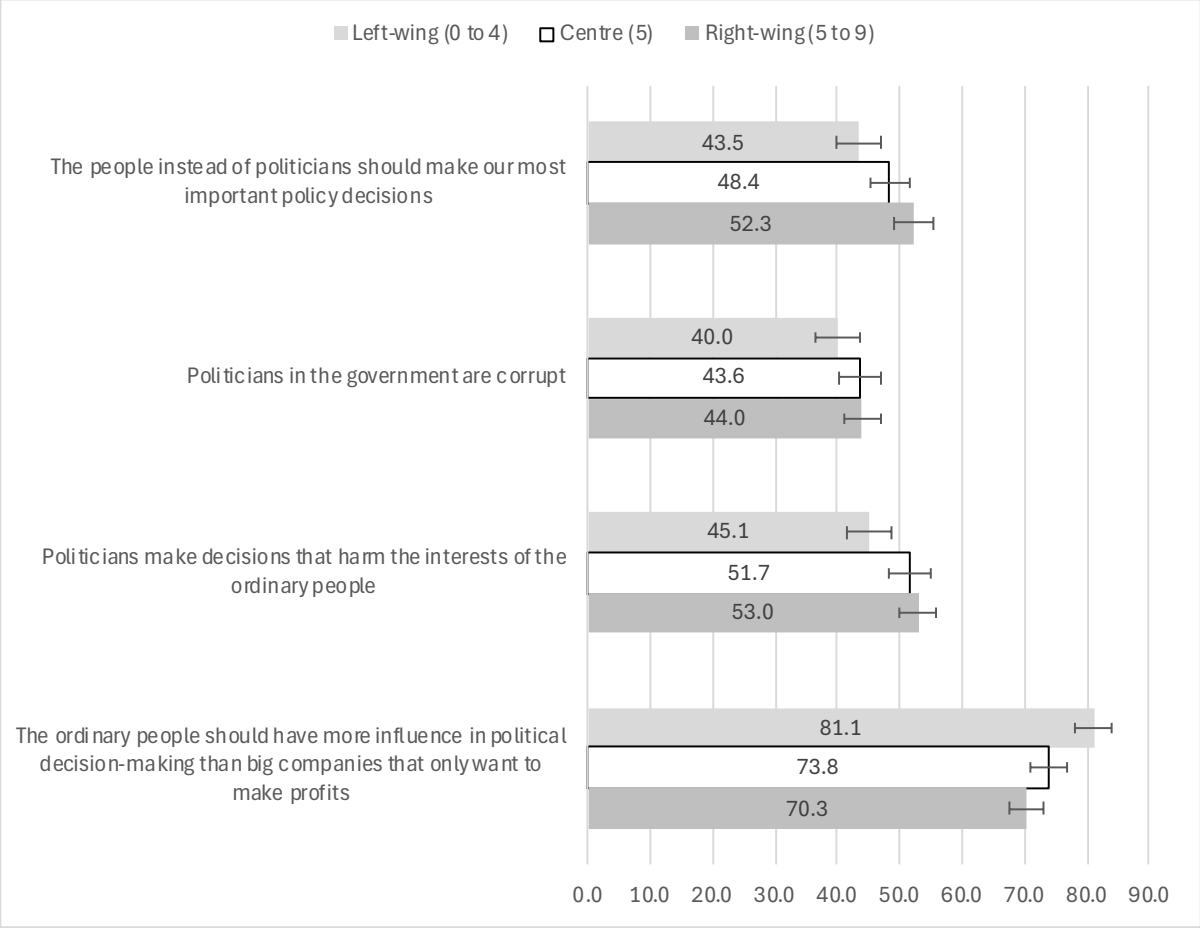
The question that varies most by education is on whether the people instead of politicians should make the most important policy decisions. Only 43.9 per cent of those with a degree agree or strongly agree with that statement. There is a greater level of agreement for those that have completed high school, but do not have a degree (49.5 per cent), but the strongest agreement is amongst those that have no completed high school, with 55.1 per cent of that group agreeing or strongly agreeing with the statement.

There is a somewhat complicated relationship between views towards politicians and where someone sits on the left-right political spectrum. For the first three of the variables

in Figure 12, those who identify as being towards the left (a value of 0 to 4) are less likely to agree with the statement, whereas there are no measured differences between those on the right and those in the centre (Figure 13). For example, only 45.1 per cent of those on the left agree or strongly agree that 'Politicians make decisions that harm the interests of the ordinary people', compared to 51.7 per cent of those in the centre and 53.0 per cent of those on the right.

For the last of the variables, however, those on the left are far more likely to agree. Specifically, 81.1 per cent of those that gave a value of 0 to 4 on the left-right spectrum agree or strongly agree that 'The ordinary people should have more influence in political decision-making than big companies that only want to make profits.' This drops to 73.8 per cent of those in the centre, and 70.3 per cent of those on the right.

Figure 13 Per cent of population that agree/strongly agree with statements on politicians, by left-right position, October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

4.3 Participation in politics

One of the potential reasons for such negative views towards politicians is the lack of ability for the general public to engage in politics and the political process. Early in the survey, we asked respondents a number of questions on their self-perceived interest in politics and ability to participate in the political system. These questions were taken from

the European Social Survey, allowing for some cross-national comparisons. Figure 14 gives results for the Australian sample, with separate figures for each of the 5 questions, reflecting the different response options.

Figure 14a shows a roughly even split across the population in terms of interest in politics. A little under half are interested (37.6 per cent quite interested and 12.3 per cent very interested) and a little over half are not interested (17.6 not at all interested and 32.6 per cent hardly interested). This interest, however, does not completely translate into a perceived ability to participate, as shown in Figure 14b to Figure 14e. Around half of Australians feel that people like them have very little or no ability to have a say in what government does, and more than half have a similarly pessimistic view when it comes to taking an active role, having an influence, or participate in politics.

Figure 14 Interest and ability to participate in politics and the political system, October 2024

Figure 14a How interested would you say you are in politics?

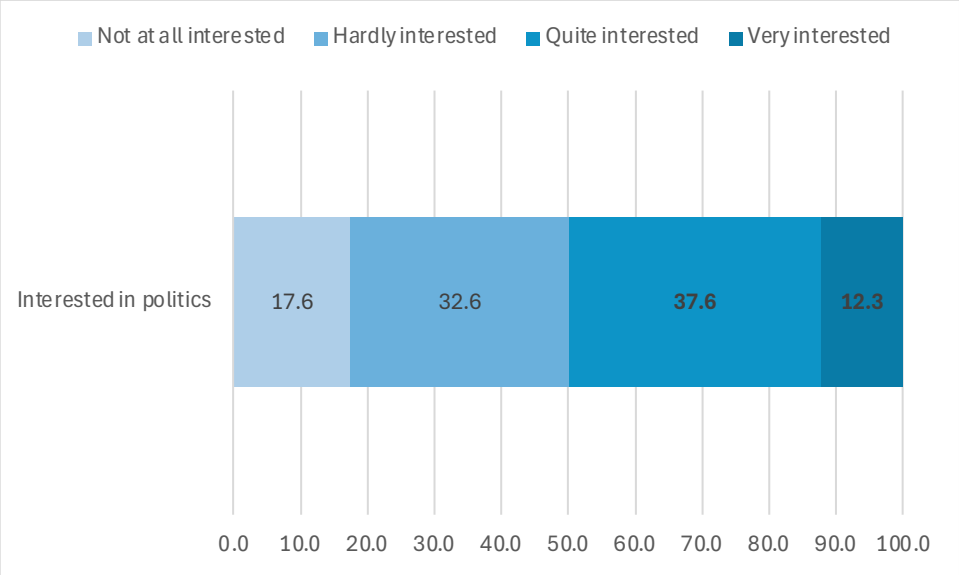


Figure 14b How much would you say the political system in Australia allows people like you to have a say in what the government does?

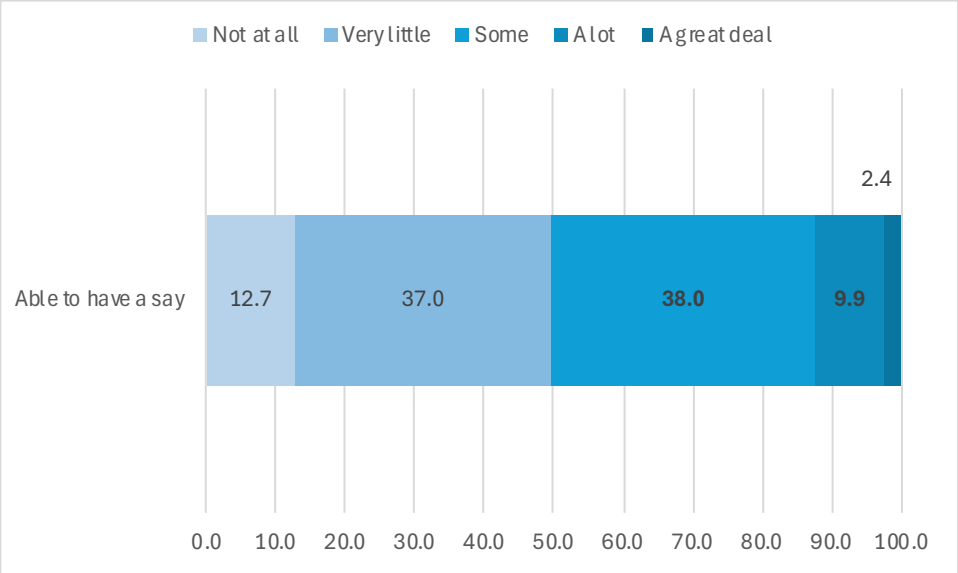


Figure 14c How able do you think you are to take an active role in a group involved with political issues?

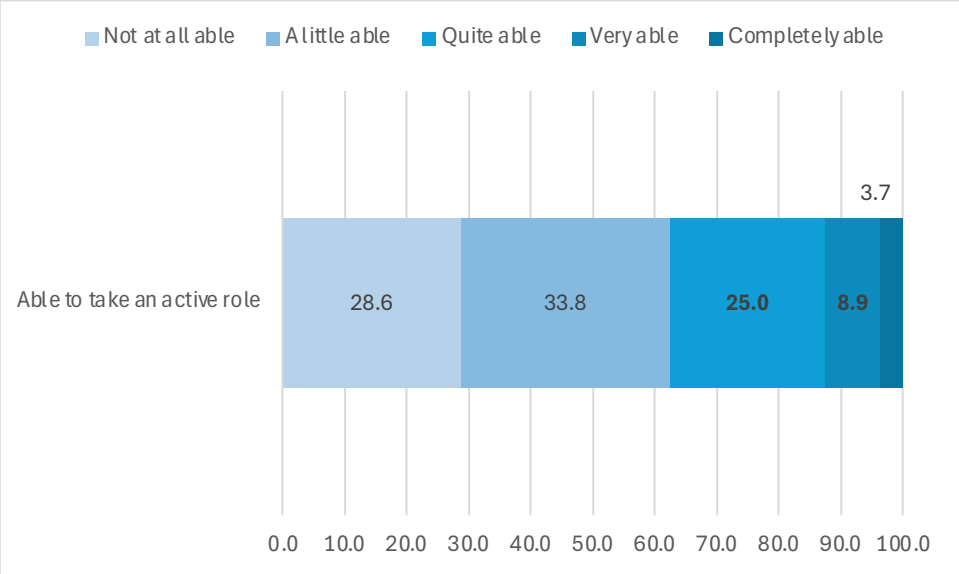


Figure 14d How much would you say that the political system in Australia allows people like you to have an influence on politics?

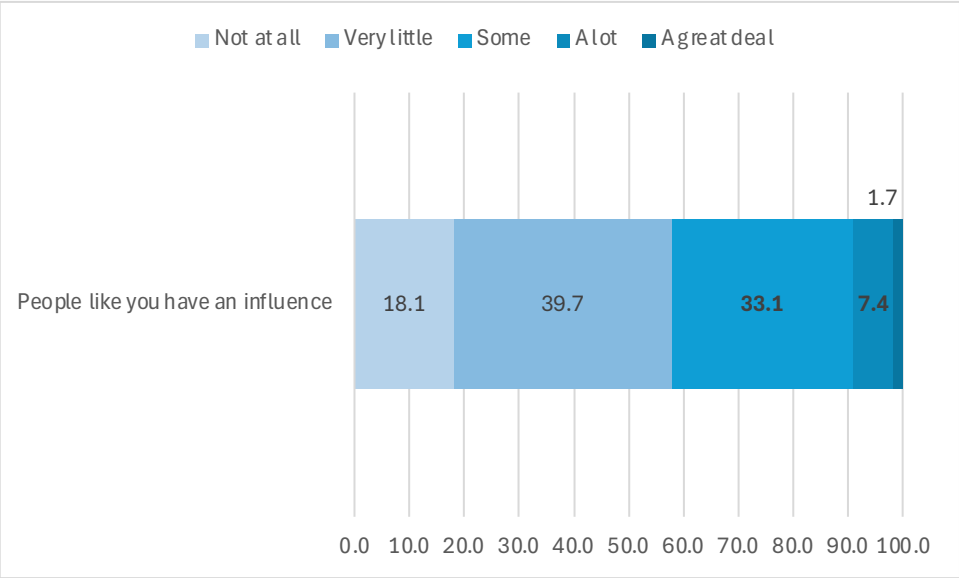
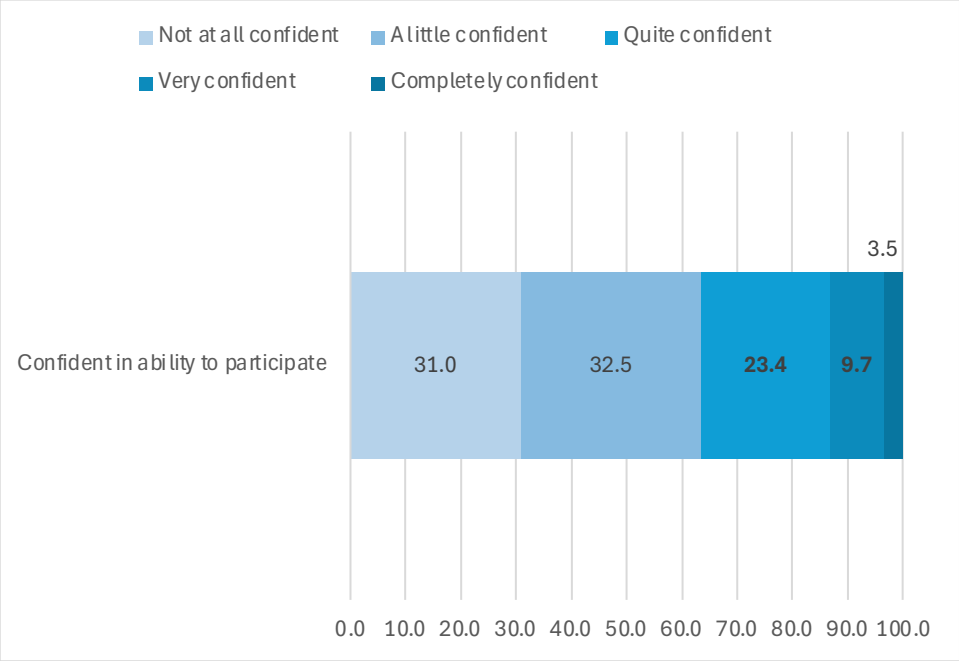


Figure 14e How confident are you in your own ability to participate in politics?



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Older Australians are more likely to report that they are interested in politics. Almost two-thirds of those aged 75 years and over say that they are quite or very interested (66.4 per cent) alongside 60.5 per cent of those aged 65 to 74 years. The remainder of the age groups were at or around half, apart from the youngest age group where only 33.2 per cent of those aged 18 to 24 years said that they quite or very interested.

More so than by age, there are large differences by sex and education. Females are not only less likely to say that they are interested in politics than males (38.6 per cent of females quite or very interested compared to 61.7 per cent of males), but they are also

less likely to feel they are able to participate. Combining the two most positive categories for the questions summarised in Figure 14b through to Figure 14e, females were less likely to say that:

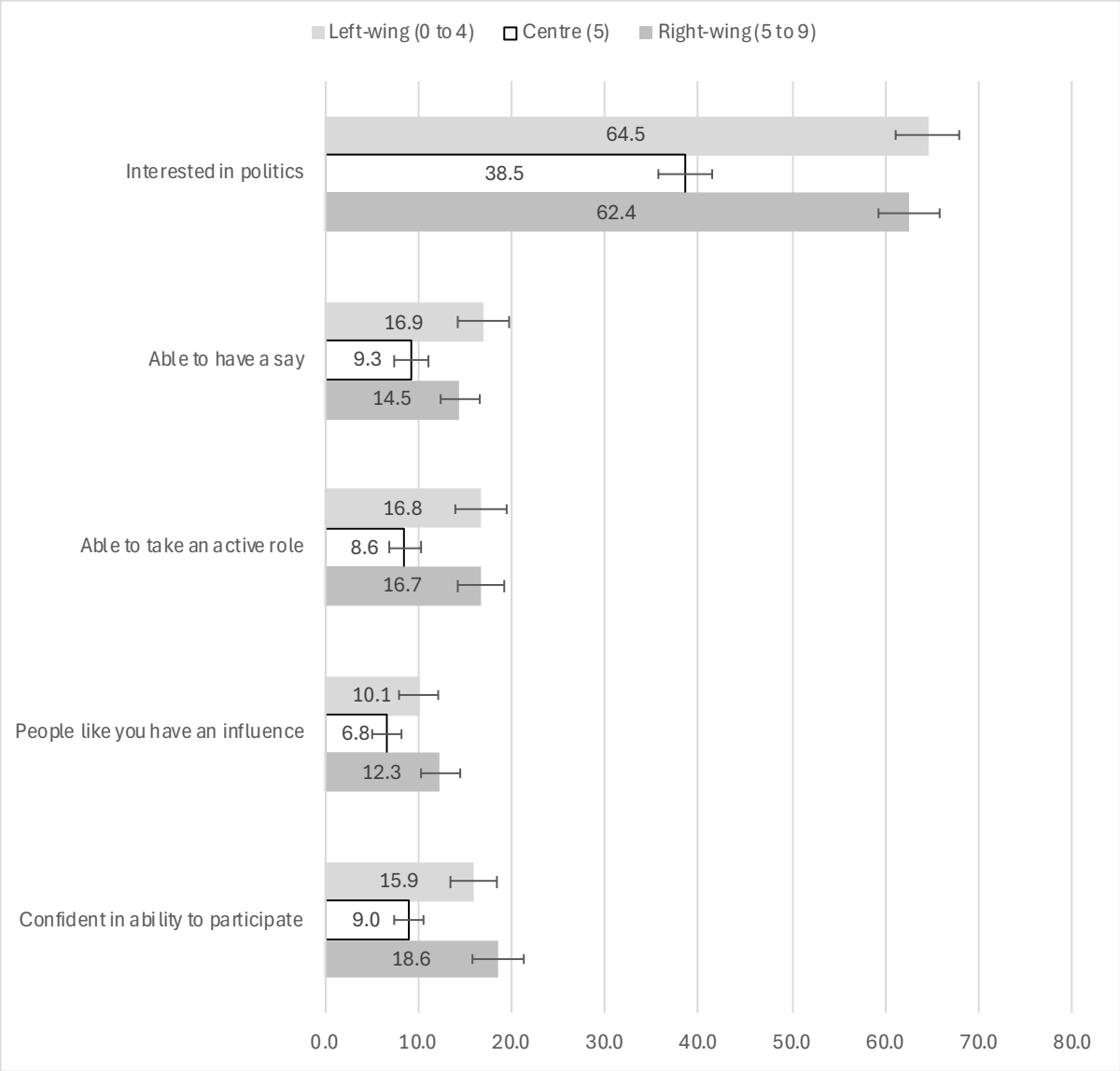
- The political system allows people like them to have a say (9.8 per cent for females compared to 15.0 per cent for males)
- They are able to take an active role in political issues (9.4 per cent for females compared to 15.8 per cent for males)
- The political system allows people like them to have an influence (7.5 per cent for females compared to 10.7 per cent for males)
- They are confident in their own ability to participate in politics (8.6 per cent for females compared to 17.9 per cent for males)

Those with relatively low levels of education are also far more disengaged with politics. Only 39.0 per cent of those that haven't completed Year 12 say that quite or very interested in politics, compared to 49.5 per cent of those that have completed Year 12 and don't have a degree, and 58.5 per cent of those with a degree. Those with low levels of education were also less likely to say that:

- The political system allows people like them to have a say (8.8 per cent for those that have not completed Year 12, 11.2 per cent for those that have completed Year 12, but without a degree, and 16.6 per cent for those with a degree)
- They are able to take an active role in political issues (8.3 per cent for those that have not completed Year 12, 11.8 per cent for those that have completed Year 12, but without a degree, and 17.0 per cent for those with a degree)
- The political system allows people like them to have an influence (7.5 per cent for those that have not completed Year 12, 8.4 per cent for those that have completed Year 12, but without a degree, and 11.4 per cent for those with a degree)
- They are confident in their own ability to participate in politics (6.5 per cent for those that have not completed Year 12, 13.0 per cent for those that have completed Year 12, but without a degree, and 18.1 per cent for those with a degree)

For the most part, those who identify as being in the centre for the left/right distribution are far less likely to feel that they are able to participate in politics and the political system. Figure 15 gives the per cent of those that give the two most positive values for the participation questions by the left/centre/right classification. The largest relative difference is for the per cent of Australians that feel they are very able or completely able to 'take an active role in a group involved with political issues', with 16.8 per cent of those on the left and 16.7 per cent of those on the right feeling able, compared to only 8.6 per cent of those in the centre.

Figure 15 Interest and ability to participate in politics and the political system, by left-right position, October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

5 Political parties and leaders

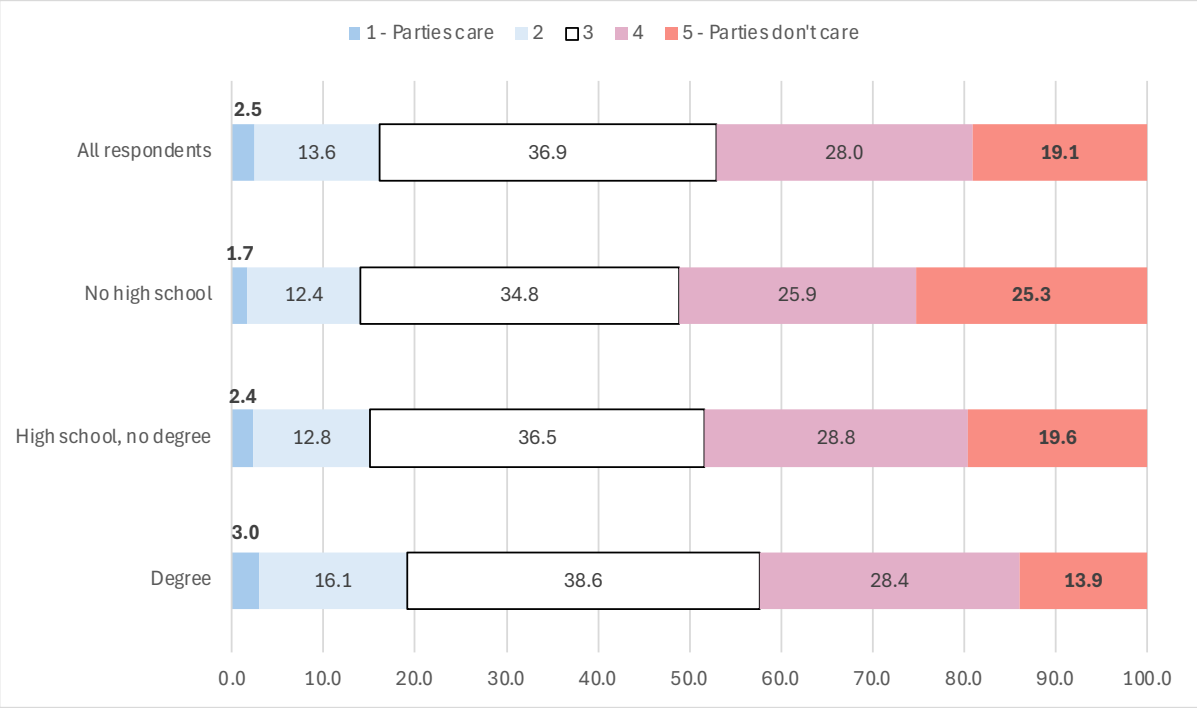
The Australian political system, like most high income democracies, is organised in part around political parties (McAllister 2002). While these institutions support a number of aspects of the democratic system, the Australian public does not have overly favourable views towards the parties, or their leaders.

We asked a general question on all parties as follows: 'Some people say that political parties in Australia care what ordinary people think. Others say that political parties in Australia don't care what ordinary people think. Where would you place your view on this scale from 1 to 5?' The value of 1 was labelled 'Political parties in Australia care what

ordinary people think' whereas the value of 5 was labelled 'Political parties in Australia don't care what ordinary people think.'

Figure 16 shows that there are more Australians that think the parties don't care than think they care. In total, there are only 16.1 per cent of Australians that gave a value of 1 or 2, compared to 47.1 per cent that gave a value of 4 or 5. The figure also shows, however, that these perceptions vary by education, with around one-quarter (25.3 per cent) of those that have not completed high school giving a value of 5, compared to a little under one-fifth (19.6 per cent) for those that have completed high school but don't have a degree, and 13.9 per cent for those with a degree.

Figure 16 Perceptions of whether parties care, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

5.1 Individual party favourability

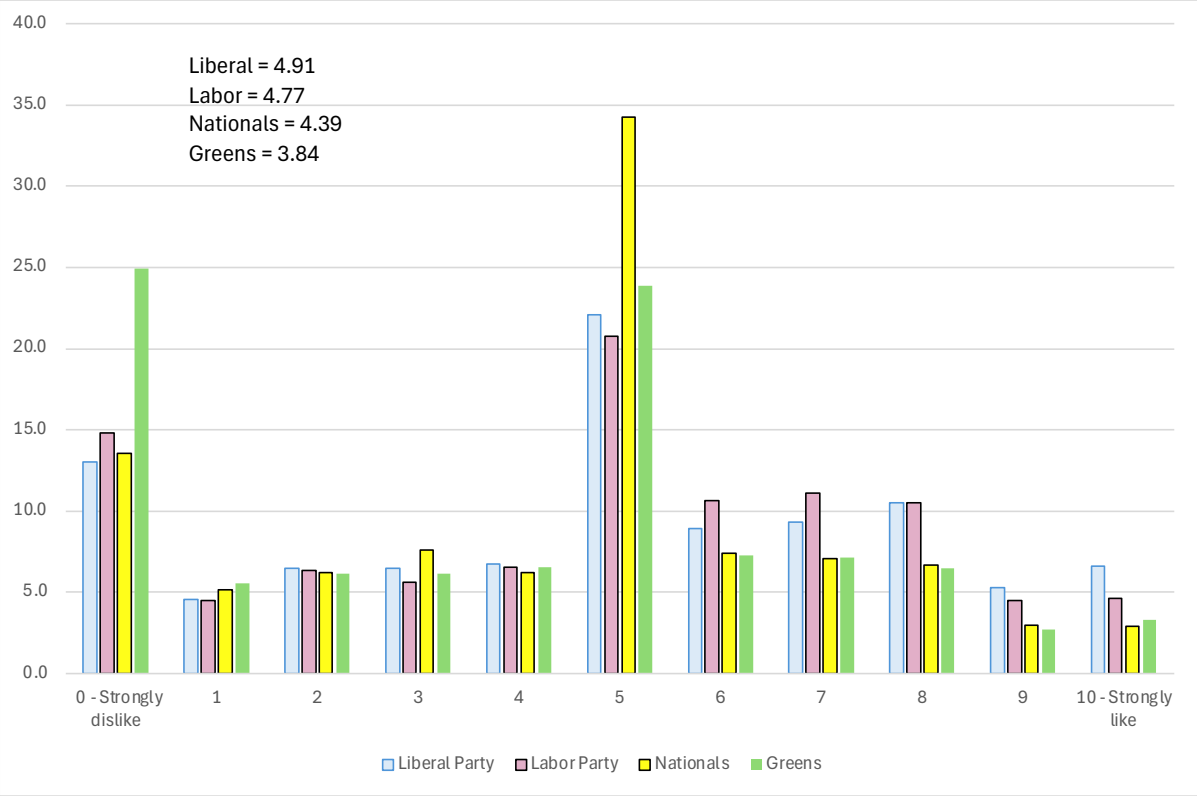
There are likely to be four main parties contesting the next Federal Election. The Liberal and National parties will again form a Coalition either in government or as the main opposition, with the Labor Party either staying in government or returning to be the main opposition. For a number of elections, the third largest party outside of these two groupings is the Greens party, which has at times been able to hold the balance of power in the Senate, and currently has four lower house Members of Parliament, including leader Adam Bandt.

In Wave 1 of the 2025EMS, we asked respondents: We would like to know what you think about Australia's main political parties. Please rate each party on a scale from 0 to 10, where 0 means you strongly dislike that party and 10 means that you strongly like that party. If you are neutral about a particular party or don't know much about them, you

should give them a rating of 5.' Figure 17 gives the distribution of responses, as well as the average value in the upper-left section of the figure.

As the lead-up to the 2025 Federal Election commences, of the four main political parties, Australians were most favourable towards the Liberal Party, with an average value of 4.91. Although the Labor Party has a slightly lower favourability, the difference is not quite statistically significant (p-value = 0.140). The two minor parties were viewed far less favourably than the two major parties, with a very high per cent of respondents having a negative view towards the Greens (24.9 per cent giving a value of 0) and a very high per cent of respondents somewhat indifferent towards the Nationals Party (34.3 per cent giving a value of 5).

Figure 17 Distribution of likeability of main political parties, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

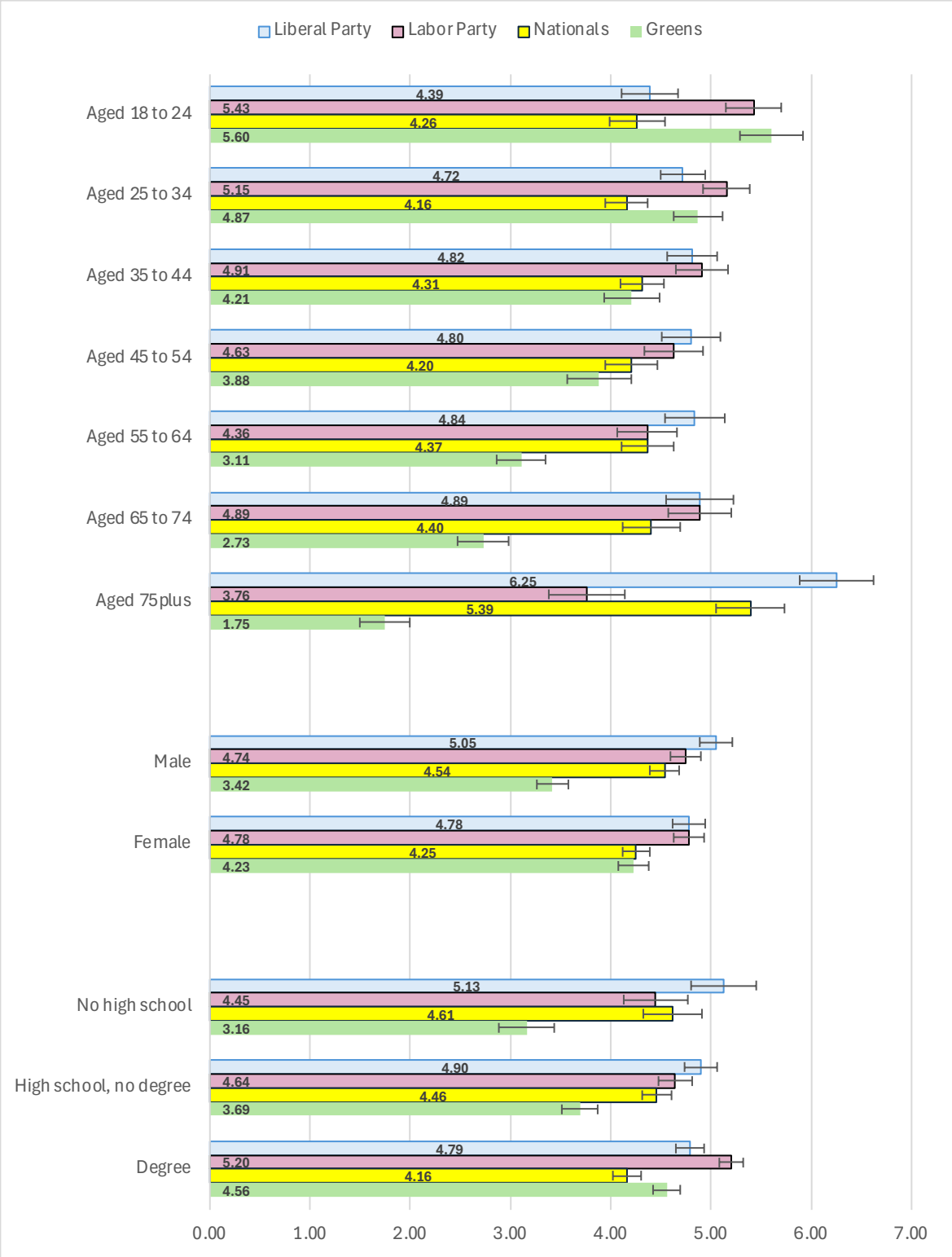
Age, sex, and education are again strongly associated with views towards the political parties. For the two major parties, the largest differences are at the top and the bottom of the age distribution. Younger Australians have a much more favourable view of the Labor party (average value of 5.43 for those aged 18 to 24) than the Liberal Party (4.39). For those aged 75 years and over, on the other hand, there is a much more favourable view towards the Liberal Party (6.25) than the Labor Party (3.76). for the Nationals, views are reasonably evenly spread across the age distribution, apart from those aged 75 years and over (average value of 5.39 towards the Nationals), whereas for the Greens there is a more or less constant decline across the age distribution, starting at 5.60 for those aged 18 to 24 and declining to 1.75 amongst those aged 75 years and over.

There are some differences in favourability by sex, but not for the Labor Party. The average value for males (4.74) is not significantly different from the average value for females

(4.78). The other three parties do have a large difference by sex though. The Liberal Party is viewed much more favourably by males (5.05) than females (4.78), as is the National Party (4.54 compared to 4.25). For the Greens, on the other hand, there is a very large difference by sex with males (3.42) much less favourable than females (4.23).

By education, we can see that the Liberal Party is viewed relatively favourably amongst those that haven't completed Year 12 (5.13) and to a lesser extent those that have completed high school but don't have a degree (4.90). These are both higher than views towards the Labor Party amongst these two education cohorts (4.45 and 4.64 respectively). Amongst those with a degree, on the other hand, there is a very favourable view towards the Labor Party (5.20) compared to the Liberal Party (4.79).

Figure 18 Average likeability of main political parties, by age, sex, and education, October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

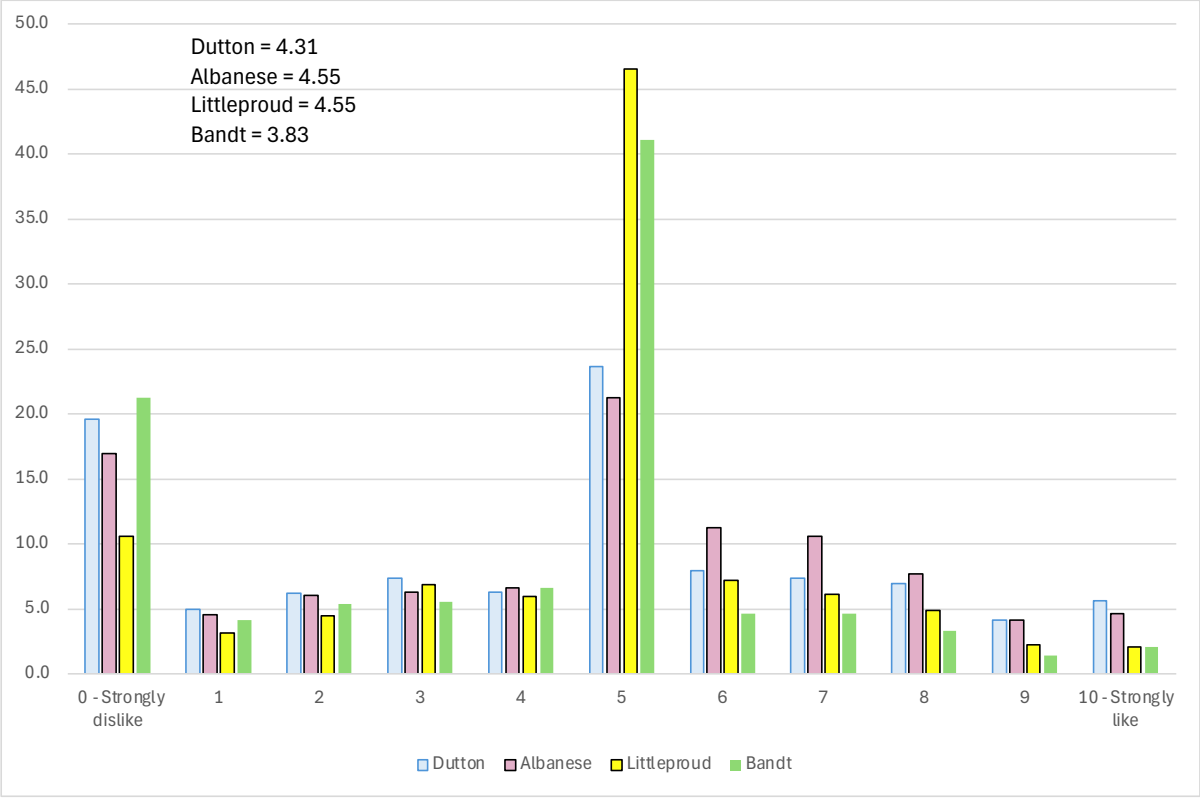
Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

5.2 Views towards party leaders

Following the question on views towards the party, respondents were asked 'Again, using a scale from 0 to 10, how much do you like or dislike the following party leaders. If you don't know much about them, you should give them a rating of 5.' Even though there is the option of giving a value of 5 (Neutral), there was a very high non-response rate for the questions on David Littleproud, the Nationals leader (467 respondents with missing values) and Adam Bandt (407 respondents with missing values).

Focusing on those that did give a response, Figure 19 gives the distribution of values, as well as the mean value in the text box. Despite a lower favourability rating for the Labor Party compared to the Liberal Party, respondents rate Prime Minister Anthony Albanese significantly higher (4.56) than Opposition Leader Peter Dutton (4.31). Nationals Leader David Littleproud has a similar rating (4.55) to the Prime Minister, due in large part to many people giving a value of 5, whereas the Greens leader Adam Bandt has the lowest rating of all party leaders (3.83).

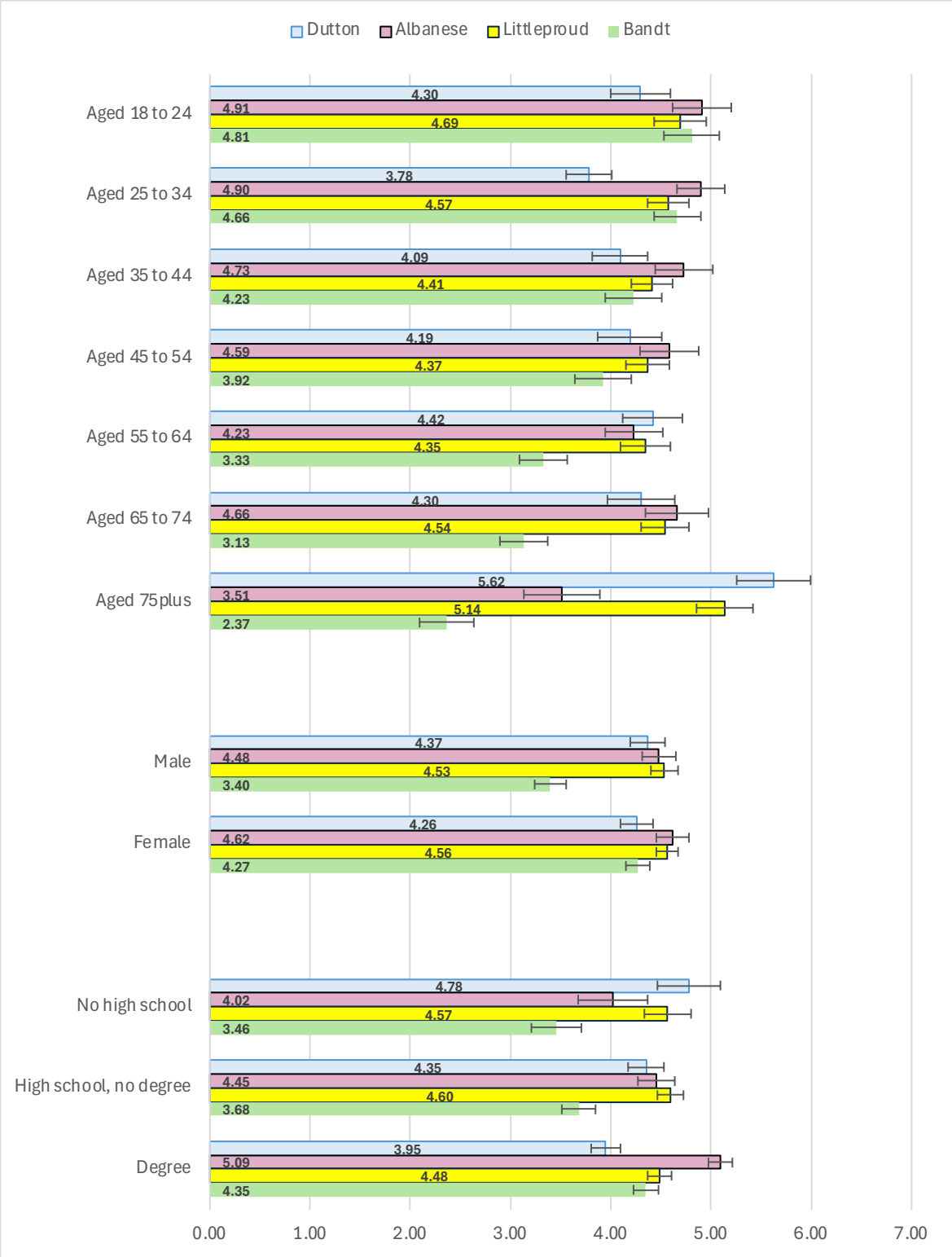
Figure 19 Distribution of likeability of party leaders, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Figure 20 shows that the variation in likeability of party leaders across demographic characteristics is similar to the variation in likeability of the parties themselves (with some exceptions). Younger Australians have more positive views towards Prime Minister Albanese and Greens leader Adam Bandt, whereas older Australians are more favourable towards Opposition Leader Petter Dutton and Nationals leader David Littleproud. Males and those with low levels of education are relatively more favourable towards Dutton and Littleproud, whereas females and those with relatively high levels of education are more favourable towards Albanese and Bandt.

Figure 20 Average likeability of party leaders, by age, sex, and education, October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

One of the characteristics of the run-up to the recent US election was the phenomenon of 'double haters.' These were people who had negative views towards presidential

candidates for both main political parties. In May/June of this year, just prior to President Biden dropping out of the race, it was reported that 'A quarter of Americans hold unfavorable views of both President Biden and former President Trump — the highest share of "double haters" at this stage in any of the last 10 elections'[9] based on opinion poll data from the Pew Research Centre. This changed substantially with the assassination attempt on the now President-elect Donald Trump, and the switch in the campaign by the Democrats towards Vice President Kamala Harris. However, for the majority of the campaign, there were a very large proportion of the population that disliked both party leaders.

In Australia, roughly the same distance from the next election, we find a smaller but not insignificant number of 'double-haters.' That is, we estimate that 14.4 per cent of Australians rate **both** Prime Minister Albanese and Opposition Leader Peter Dutton somewhere between 0 and 4 on the likeability scale. With four party leaders, we can go in even more depth in the Australian context though, and identify 'quadruple haters', or those that dislike all four of the party leaders at the time of the survey. This group represents 7.3 per cent of the adult Australian population.

To a certain extent, the demographic predictors of leader favourability for the Prime Minister and Opposition Leader cancel each other out. That is, the characteristics that predict a higher likelihood of dislike for one of the two leaders has a negative association with dislike for the other one. However, there are some demographic groups where 'double haters' are concentrated. There are higher rates amongst younger Australians, with 17.7 per cent of those aged 18 to 44 disliking both leaders, compared to 8.5 per cent of those aged 65 years and over (those aged 45 to 64 are somewhere in between with a value of 13.8 per cent).

Where there are large differences though is some of the more substantive measures we have discussed earlier in the paper. Only 13.1 per cent of 'double haters' are confident in the Federal Government compared to 42.5 per cent of the rest of the population. Similarly, only 38.0 per cent of 'double haters' are satisfied with democracy, compared to 68.8 per cent of the rest of the population, and only 36.4 per cent are satisfied with the direction of the country (compared to 64.3 per cent of other Australians).

6 Financial stress, wellbeing and the relationship with political views

6.1 Financial stress

Since the start of 2020, the ANUpoll series of surveys have been tracking whether a person perceives that their household income is adequate to meet their needs. Respondents are given four potential descriptions and asked to choose which comes closest to how they feel about the adequacy of their income: living comfortably; coping; finding it difficult; or finding it very difficult. We repeated this question in Wave 1 of the 2025EMS.

In October 2024, it is estimated that about one-quarter (23.7 per cent) of Australians were living comfortably on their present income, a little under half (46.4 per cent) were coping,

more than one-in-five (21.4 per cent) were finding it difficult and a little under one-in-ten (8.5 per cent) were finding it very difficult.

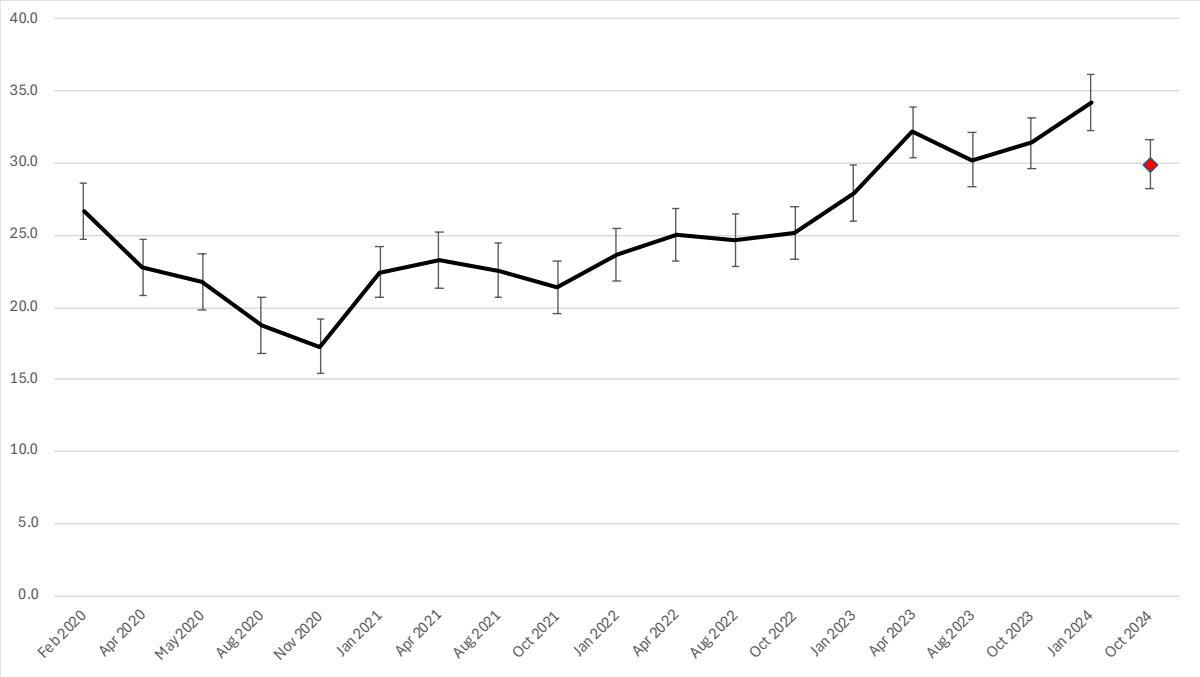
Figure 21 shows the proportion of the population finding it difficult or very difficult on their current income since the start of 2020 just prior to the COVID-19 pandemic reaching Australia. Again, although the ANUpoll and 2025EMS data use many of the same questions, because they are drawn from different samples, we present the series separately.

There are three distinct phases over the period. The first is February to November 2020, during which the level of financial stress declined with the proportion of the population finding it difficult or very difficult to manage on their current income falling from 26.7 per cent to 17.3 per cent in November 2020. While this drop in financial stress coincided with a decline in average income, it was also a period when governments provided significant financial support via the social security and tax system to the lower part of the income distribution, and interest rates and inflation were very low (or even negative for inflation at some points in time). In addition, during periods of "lockdown" and social distancing requirements, there were far fewer expenditure options than prior to COVID-19.

The second period covers all of 2021, during which financial stress was higher than the latter part of 2020 but stable and still below what it was just prior to the pandemic. This was a period when much of Australia was out of lockdown, (with the exception of New South Wales, Victoria, and the Australian Capital Territory) and the additional pandemic-era transfer payments (JobKeeper and the JobSeeker supplement) were no longer being made. However, interest rates and inflation remained low, people had built up substantial savings in the previous years, and Australia's international border remained closed.

During the third period, commencing in January 2022 and continuing to January 2024, there was a steady increase in this measure of financial stress. By April 2023 the level of financial stress was significantly above the pre-COVID-19 baseline, and the January 2024 figure of 34.2 per cent was higher still, and well above the average over the preceding four years. It is unclear whether the slight decline between January and October 2024 represents a turning point in the financial stress measure, or whether it represents a slight shift in methodology. However, even with the decline, financial stress is within the same error bounds of data collected throughout 2023, indicating that financial stress is still relatively high in the context of the 2020s.

Figure 21 Per cent of Australians finding it difficult or very difficult on their current income, February 2020 to October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: Australian Social Survey International-ESS, February 2020. ANUpoll (April 2020 to January 2024) and Wave 1 of the 2025 Election Monitoring Survey Series (October 2024)

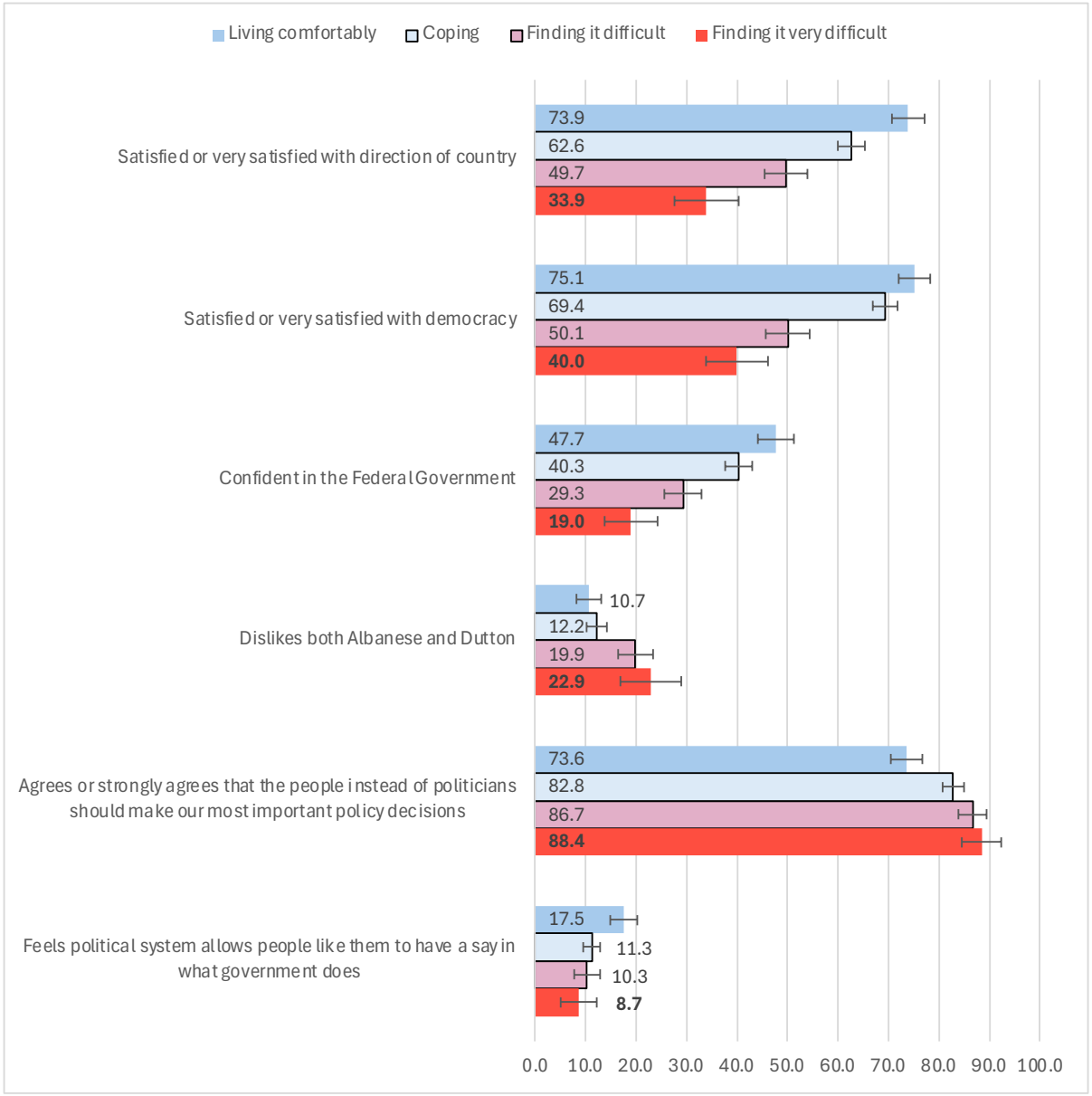
The two age groups that are most likely to report that they are finding it difficult on their current income are younger Australians (34.2 per cent of those aged 18 to 24 were finding it difficult or very difficult) and those of the peak child-rearing years (35.2 per cent for those aged 35 to 44). This measure of financial stress declines amongst older Australians, with 26.7 per cent of those aged 65 to 74 years finding it difficult or very difficult, and only 20.5 per cent of those aged 75 years and over.

The other predictor of financial stress is education. For those that have not completed Year 12, 30.6 per cent were finding it difficult or very difficult on their current income. Those that have completed Year 12 but do not have a degree have a slightly higher level of financial stress, with 32.7 per cent reporting difficulties (the difference is not, however, statistically significant). Those with a degree, however, have much lower levels of financials stress, with only 25.3 per cent reporting that they are finding it difficult or very difficult.

Financial stress is also a very strong predictor of the political views discussed earlier in the paper. Figure 22 gives the per cent of respondents who report each of the political views, separately by their level of financial stress. Although each individual difference isn't always statistically significant, the patterns are very clear. Those who are finding it difficult or very difficult on their current income are less likely to be satisfied with the direction of the country and with democracy, less likely to be confident in the Federal Government, more likely to say they dislike both the Prime Minister and Opposition Leader ('double haters'), more likely to think that people should be making decisions rather than politicians, and less likely to think people like them can have a say in what government does. In short, those experiencing financial stress are far more likely to be

disengaged from the political system and have negative views towards the country and its institutions.

Figure 22 Political views by financial stress, October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

6.2 Loneliness and wellbeing

There has been substantial concern and media reporting regarding a perceived increase in loneliness in recent years, with some going so far as to describe the current situation in western democracies as a 'loneliness epidemic'[10]. There is no doubt that loneliness increased on average during the COVID-19 lockdowns including in Australia,[11] though there is less evidence that loneliness has been increasing over the longer term, or that any increase has been dramatic enough for it to be labelled an epidemic.

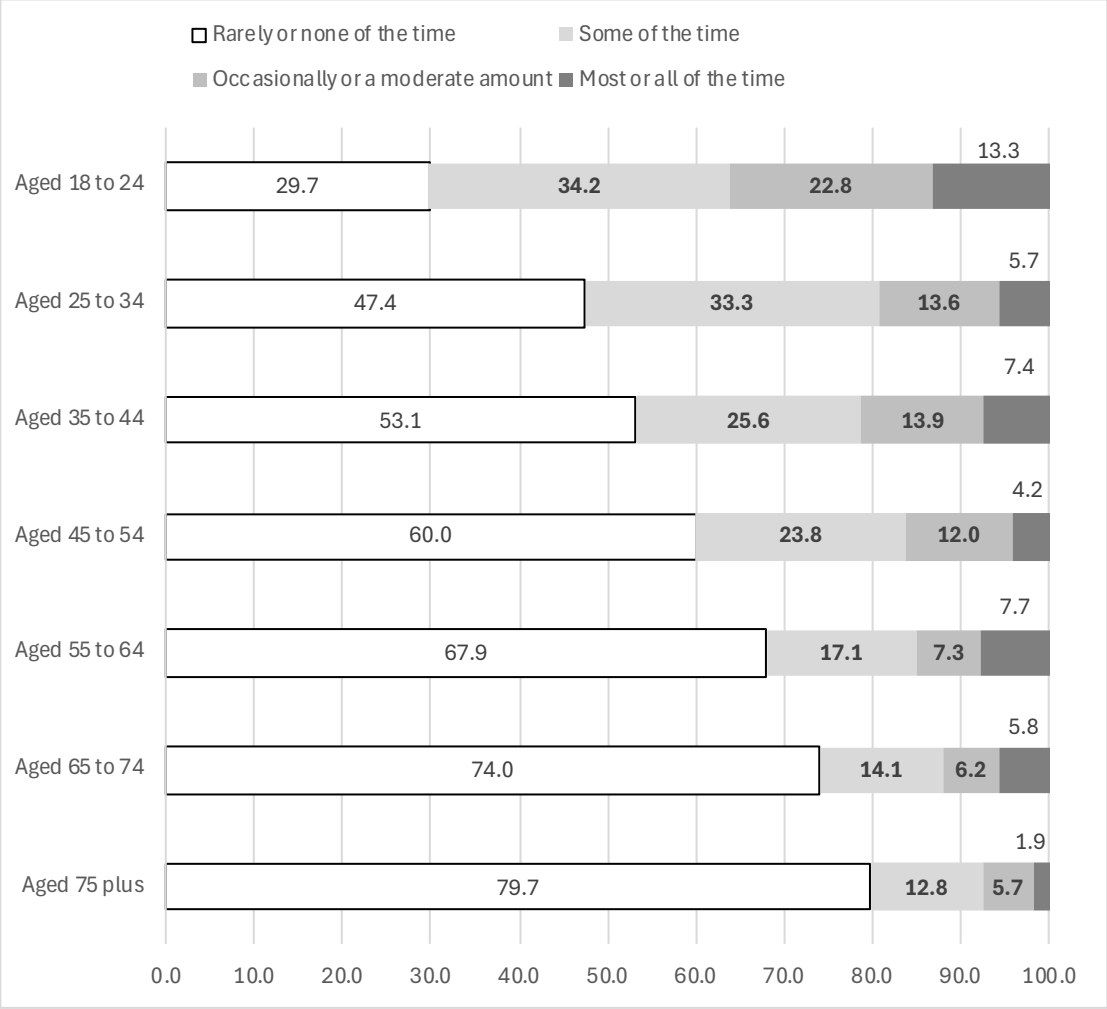
Ortiz-Ospina and Roser (2024) looked at all available data and concluded that: 'Surveys from rich countries do not suggest there has been an increase in loneliness over time. Today's adolescents in the US do not seem to be more likely to report feeling lonely than adolescents from a couple of decades ago; and similarly, today's older adults in the US do not report higher loneliness than did adults of their age in the past.' Despite this, the authors nonetheless do make the point that 'It's important to provide support to people who suffer from loneliness.'

One of the things that has changed through time (in Australia at least) is the age patterns of loneliness. Reporting on data from the Household, Income, and Labour Dynamics in Australia (HILDA) survey, the team that runs the survey at the University of Melbourne[12] reported that 'Between 2001 and 2009, the greatest proportion of lonely people was among those aged 65 and older. However, by 2021, this group contained the lowest proportion of lonely individuals of all age groups with the 15-24 age group now the highest. All other age groups had a lower proportion of lonely people in 2021 than in 2001.' One of the study authors, Dr Ferdi Botha, is quoted as saying 'There is a clear trend of younger people becoming lonelier and feeling more isolated as time goes on. If there aren't actions taken or policies implemented to intervene, we may see loneliness and psychological distress increasing in the younger generations and this may lead to lower mental and physical wellbeing and other wider societal issues.'

Just prior to asking respondents about their political attitudes, we asked 'In the past week, how often have you felt lonely?' 57.8 per cent of Australians were lonely 'Rarely or none of the time (less than 1 day),' with 23.8 per cent reporting they were lonely 'Some or a little of the time (1 to 2 days),' 11.8 per cent 'Occasionally or a moderate amount of time (3 to 4 days),' and 6.5 per cent of Australians reporting that they were lonely 'Most or all of the time (5 to 7 days).'

We do not find any relationship between loneliness and sex, education, country of birth, location outside of a capital city, or language spoken at home. Similar to the data from HILDA, however, we do find that there is a strong relationship with age (Figure 23). If we combine those that reported feeling lonely at least some of the time, then 70.3 per cent of those aged 18 to 24 years were lonely in the week prior to the survey. This declines consistently across the age distribution, such that for those aged 75 years and over, only 20.3 per cent experienced loneliness in the previous week.

Figure 23 Experience of loneliness by age group, October 2024



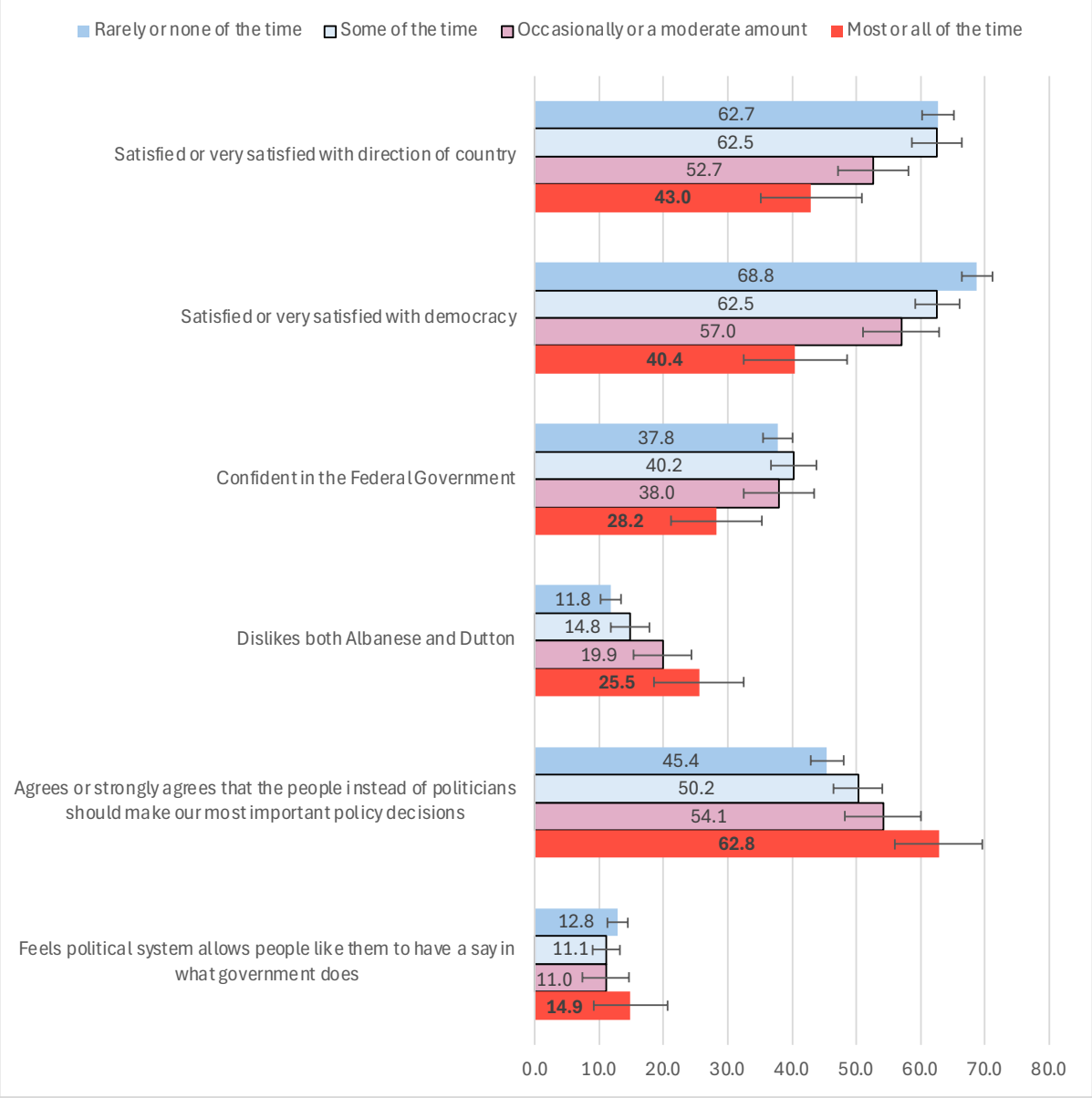
Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Notwithstanding the uncertainty over the trends in loneliness, it is clear that public health agencies are concerned about the impact on physical and mental health. However, there is a smaller, but important literature on the relationship between loneliness and political attitudes. Floyd (2017) found that in the US, 'loneliness is positively correlated with xenophobia and endorsement of right-wing authoritarianism' The causal relationship is more difficult to identify definitively, and although Langenkamp (2022) has found with longitudinal data that 'intra-personal variation in loneliness predicts a citizen's sense of connectedness and interpersonal trust beliefs' they also found that 'Regarding political trust, the relationship was not found with panel fixed effect.' The author did find in a subsequent paper with a separate co-author (Langenkamp and Stepanova 2024) that 'Loneliness and social isolation are both correlated with … reduced political efficacy (the extent to which a person thinks their voice counts in politics).'

Although the 2025 EMSS does not yet have the longitudinal capacity to test some of the analysis discussed above, results presented in Figure 24 provides some strong evidence that many of the political views considered in the survey are correlated with loneliness. In general, we find that the more frequent the experience of loneliness, the less likely it is that Australians are satisfied with the direction of the country, satisfied with democracy, and to a lesser extent confident in the federal government. Loneliness is correlated with

a higher probability of disliking both the Prime Minister and Opposition leader, and that people instead of politicians should make important decisions. In contrast to Langenkamp and Stepanova (2024), we do not find any evidence that loneliness in Australia is correlated with our measure of political efficacy.

Figure 24 Political views by loneliness, October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

6.3 Modelling the relationship between financial stress, loneliness and satisfaction with democracy

Although it is not possible to capture the democratic health of a country or its resilience with a single measure (Holloway and Manwaring 2023), satisfaction with democracy is a useful measure to compare across countries and across time. Both Figure 22 and Figure 24 showed that both financial stress and loneliness respectively were related to

satisfaction with democracy. However, there are other demographic and socioeconomic factors that are associated with all three variables, so it is unclear from this simple cross-tabulation whether the relationship still holds within particular age or other demographic groups. Furthermore, the two figures used the binary satisfaction with democracy measure, that doesn't quite capture the full diversity of satisfaction.

One way to make have more confidence in the interpretation is through regression-style analyses. Under this approach, it is possible to look at associations between our main outcome (satisfaction with democracy) and another variable or set of variables of interest (for example financial stress or loneliness) whilst holding constant another variable (for example age or education). Table 1 gives the results from such an analysis. Because the dependent variable is categorical and we want to take into account the full spectrum of satisfaction, the relationships are estimated using the ordered probit model.

We can see confirmation from previous discussion that satisfaction with democracy is higher for young and old Australians (relative to those aged 25 to 64), males, and those with relatively high levels of education. We can also see a sightly lower level of satisfaction for those that live outside a capital city. However, the main finding from the results summarised in Table 1 is that those that experience financial stress are significantly and substantially less likely to be satisfied with democracy controlling for those characteristics and, although the size of the relationships is somewhat less, that conditional on the same demographic characteristics and financial stress, those that experienced loneliness in the week prior to the survey were less satisfied with democracy than those that did not.

Table 1 Regression model estimates of the factors associated with satisfaction with democracy, October 2024

Explanatory variables	Coefficient	Signif.
Finding it difficult or very difficult to get by on current income	-0.515	***
Experienced loneliness in the previous week	-0.158	***
Aged 18 to 24 years	0.208	**
Aged 25 to 34 years	0.031	
Aged 45 to 54 years	0.070	
Aged 55 to 64 years	0.012	
Aged 65 to 74 years	0.208	**
Aged 75 years plus	0.204	**
Female	-0.099	**
Has not completed Year 12 or post-school qualification	-0.162	**
Has a degree	0.145	***
Born overseas in a main English-speaking country	-0.042	
Born overseas in a non-English speaking country	-0.054	
Lives outside of a capital city	-0.089	*
Speaks a language other than English at home	0.039	
Cut-point 1	-1.702	
Cut-point 2	-0.589	
Cut-point 3	1.203	
Sample size	3,313	

Notes: Ordered probit regression model. The base case individual is not suffering from loneliness or financial stress; male; aged 35 to 44 years; born in Australia; does not speak a language other than English at home; has completed Year 12 but does not have a degree; and lives in a capital city.

Coefficients that are statistically significant at the 1 per cent level of significance are labelled ***; those significant at the 5 per cent level of significance are labelled **, and those significant at the 10 per cent level of significance are labelled *

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

7 Voting intentions ahead of the campaign

7.1 Current voting intentions

Although at the time of writing an election date has not been set for 2025, it needs to be held before the end of May, so it is at most 6 months away. This is a point in time where the so-called 'low information voters' (Fowler and Margolis 2014) have at least started to pay a little bit of attention to the election, or at the very least the political parties are increasing their focus on getting their core message across to them.

To understand voting intentions as the campaign is about to get underway, at the start of the survey, respondents were asked 'If a federal election for the House of Representatives was held today, which one of the following parties would you vote for?' Figure 25 gives the per cent of respondents who indicated that they would vote for each of five party groupings. We group the Liberal and National parties into the Coalition, all parties other than Coalition, Labor, and Greens into 'other', and include the respondents who report that they are 'not sure' into the fifth and final category.

Looking first at all Australians combined, the Coalition has a substantial lead on the primary vote, with 38.2 per cent of Australians saying they would vote for the Coalition if the election was held on the day of the survey, compared to 31.8 per cent who say they would vote for Labor. The Greens have a primary vote share of 11.9 per cent which, given

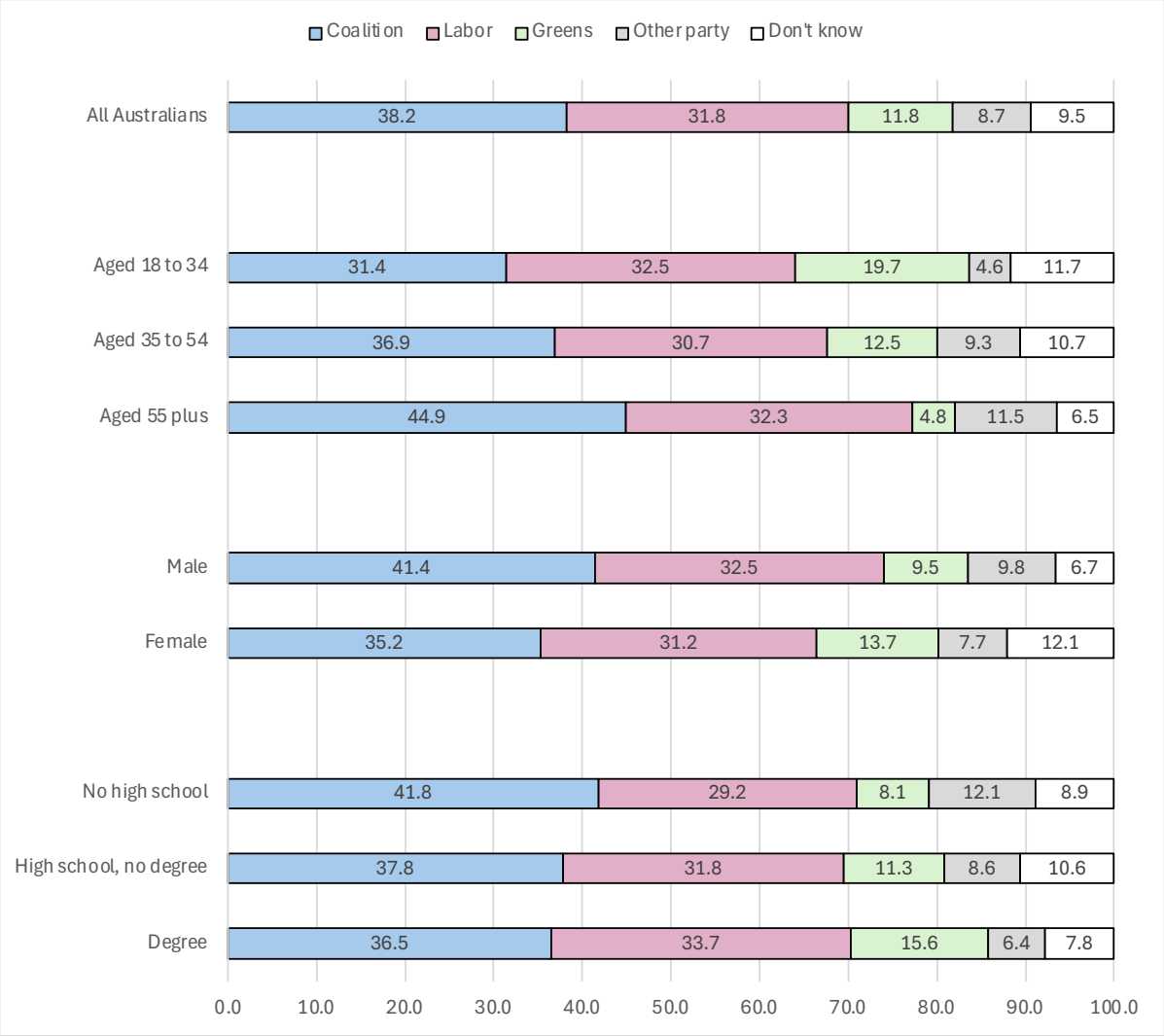
the vast majority of preferences for Greens voters flows to Labor,[13] suggests a slight preference for the two main left of centre parties over the two main right of centre parties (Liberals/Nationals). The remaining 8.7 and 9.5 per cent say they would vote for another party or not sure respectively.

Age, sex, and education are all strongly predictive of voting intentions, as demonstrated in the remainder of Figure 25. Focusing first on the Coalition vote, there is a large increase across the age distribution, with those aged 55 years and over (44.9 per cent) almost 50 per cent more likely to say they would vote for the Coalition compared to those aged 18 to 34 years (31.4 per cent). Males are more likely to say that they would vote for the Coalition than females (41.4 per cent compared to 35.2 per cent) as are those with relatively low levels of education.

The Labor voting intention varies much less across these three demographic characteristics. There is very little difference by age, and males are only slightly more likely to say they would vote Labor (though not significantly so). There are somewhat larger differences by education, with those with a degree about 4.5 percentage points more likely to say they would vote Labor compared to those that have not completed High School. There are, however, much larger differences on the left of politics for the Greens vote. Younger Australians are more than four times as likely to say they would vote Greens as older Australians (19.7 pe cent for those age 18 to 34, 4.8 per cent for those aged 55 plus) and females are almost 50 per cent more likely than males (13.7 compared to 9.5 per cent). Finally, those with a degree are almost twice as likely to say they would vote Greens as those that had not completed High School (15.6 compared to 8.2 per cent).

A final, somewhat surprising result is that females are more likely to say that they are unsure who they would vote for (12.1 compared to 6.7 per cent). Given the requirements around compulsory voting in Australia, who these individuals end up voting for may end up having a large impact on the 2025 Federal Election outcome.

Figure 25 Voting intentions, by demographic characteristics, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Moreso than demographic characteristics, the political views and economic circumstances of the Australian population are strongly predictive of their voting intentions (Figure 26). Those who are satisfied either with the direction of the country or with democracy are far more likely to say they would vote Labor than those who are not satisfied. However, while satisfaction with the direction of the country was strongly (negatively) correlated with likelihood of voting for the Coalition, there was a much weaker relationship with satisfaction with democracy. Rather, those who were not satisfied with democracy were slightly more likely to say they would vote Greens (14.1 per cent compared to 10.6 per cent for those who were satisfied), but far more likely to say they would vote for another party – 16.0 per cent compared to 4.8 per cent for those that were satisfied.

The voting intentions of the so-called double haters are quite interesting. Given the way the variable is constructed, it is not surprising that those who dislike both Prime Minister Albanese and Opposition Leader Peter Dutton are less likely to say they would vote for either the Labor Party or the Coalition (28.9 per cent compared to 41.1 per cent). However, the disparity is much greater when it comes to the Labor vote, with only 14.0

per cent of double haters saying they would vote Labor compared to 35.2 per cent of the rest of the population. These double haters are more likely to vote Greens (21.0 compared to 10.2 per cent), but are substantially more likely to say they would vote for another party (24.9 compared to 6.2 per cent).

Experiences of financial stress also seems to be associated with a much larger difference in the Labor vote compared to the Coalition vote, though both are lower for those who are finding it difficult to get by on their current income compared to those that aren't. In particular, only 28.1 per cent of those that experienced financial stress said that they would vote Labor compared to 33.6 per cent of those that did not.

The final factor that we consider in Figure 26 is loneliness. We find very little relationship with Labor vote, but a slightly higher relationship with Coalition and Greens vote. Specifically, those that have experienced loneliness are less likely to say they would vote for the Coalition (34.3 compared to 41.2 per cent) but more likely to say they would vote Greens (15.3 compared to 9.3 per cent). Some, although not all of this difference appears to be due to the relationship between age and loneliness, with younger Australians otherwise more likely to be lonely, less likely to vote Coalition, and more likely to vote Greens. When we look at those aged 18 to 24 years specifically, those that have experienced loneliness are less likely than the rest of their age group to say they would vote for the Coalition (25.0 compared to 32.2 per cent), but no more or less likely to say they would vote Greens (23.4 compared to 23.1 per cent).

Figure 26 Voting intentions, by political views, October 2024

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

7.2 Change in voting intentions from 2022 election

If the voting intentions identified earlier in this section were to hold until the election took place, all of the political outcomes we have seen in the 21st Century would be possible – a Coalition or Labor government, with that government having either a majority or a minority of seats in the House of Representatives. The specific outcome would be influenced by the distribution of votes across seats, and the preference flows from the minor parties. This represents a sizable change from the 2022 election, when the Labor

Party won 77 seats (a majority in the 151 seat Parliament) compared to 58 seats for the Coalition. This was based on a primary vote of 32.6 per cent for Labor compared to 35.7 per cent for the Coalition, a ratio of 0.91 compared to 0.83 implied from Figure 25 when we exclude those who do not know who they would vote for.

In the October 2024 survey, we first asked respondents 'Some people don't vote nowadays for one reason or another. Did you vote in the last Australian Federal election in May 2022?' Those who answered yes were then asked 'Which party did you vote for **first** in the House of Representatives (Lower House)?' [**bold** in original].

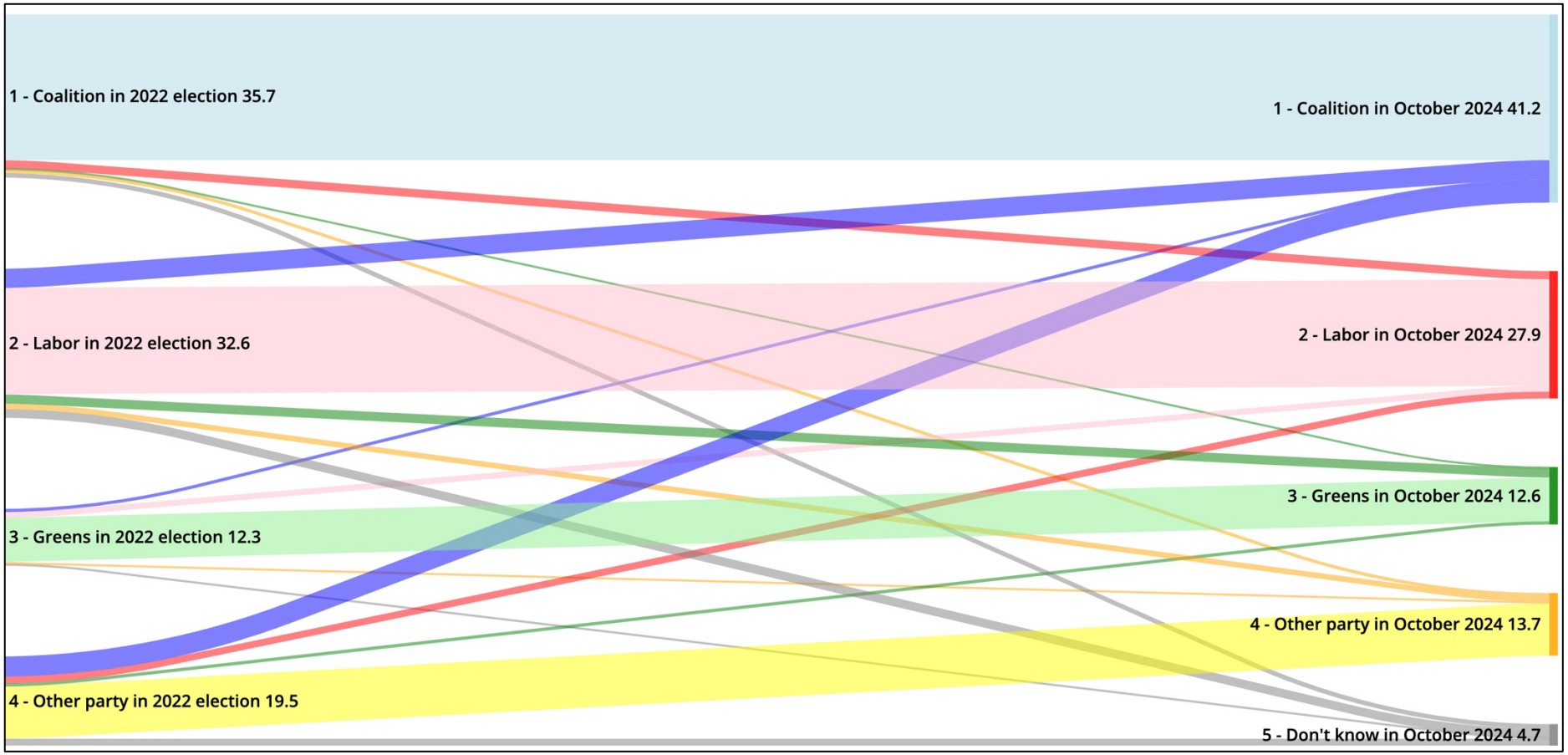
There is a long history of research identifying biases in recall with regards to voting behaviour, going back to at least the 1970s (Himmelweit et al. 1978), and with more recent scholarship delving into the mechanism (Van Elsas et al. 2014) for the bias. There is also debate as to whether such questions should be used to adjust estimates of voting intention to better reflect the electorate, though the consensus still appears to be that it is better to not weight by self-reported past vote (Durand et al. 2015).

Because of the potential for biases, we do not weight our main analysis using past vote. However, in the following figure, we do present flows between the stated first preference vote in the 2022 election and the stated voting intentions as of October 2024, with weighting based on past vote (as well as age, sex, education, and employment). We exclude those that were not eligible to vote in May 2022, were eligible but did not vote, voted informally, and did not know who they voted for. These are then weighted to the voting outcome from the Australian Electoral Commission[14] of 35.7 per cent voting for the Coalition, 32.6 per cent voting for Labor, 12.3 per cent voting for the Greens, and 19.5 voting for another party.

Figure gives a visual representation of these flows. The numbers in the left and right nodes are the percentage of people that voted for each of the party groupings in the 2022 election and their voting intentions in October 2024 (including don't know) respectively. The size of the ribbons between the nodes are proportional to the flows between them. It should be noted that the numbers on the right nodes do not line up with those presented previously in this section, as they exclude those that did not vote in 2022 or who do not remember who they voted for. The size of the flows is given in Appendix Table 1.

Within the population of interest, 23.9 per cent of Australians changed their voting intention from their self-reported May 2022 election vote. Figure 27 shows that the flows into the Coalition node (darker blue) are much greater than the flows into the Labor node (red). There were roughly equal flows from Labor voters to Coalition (4.2 per cent of the total population) as there were from Other party voters to the Coalition (4.4 per cent). Furthermore, the largest flow into the Don't know group is coming from previous Labor voters (1.9 per cent in total).

Figure 27 Change in voting intentions between the May 2022 election and October 2024



Note: Figure created at https://sankeydiagram.net/.

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

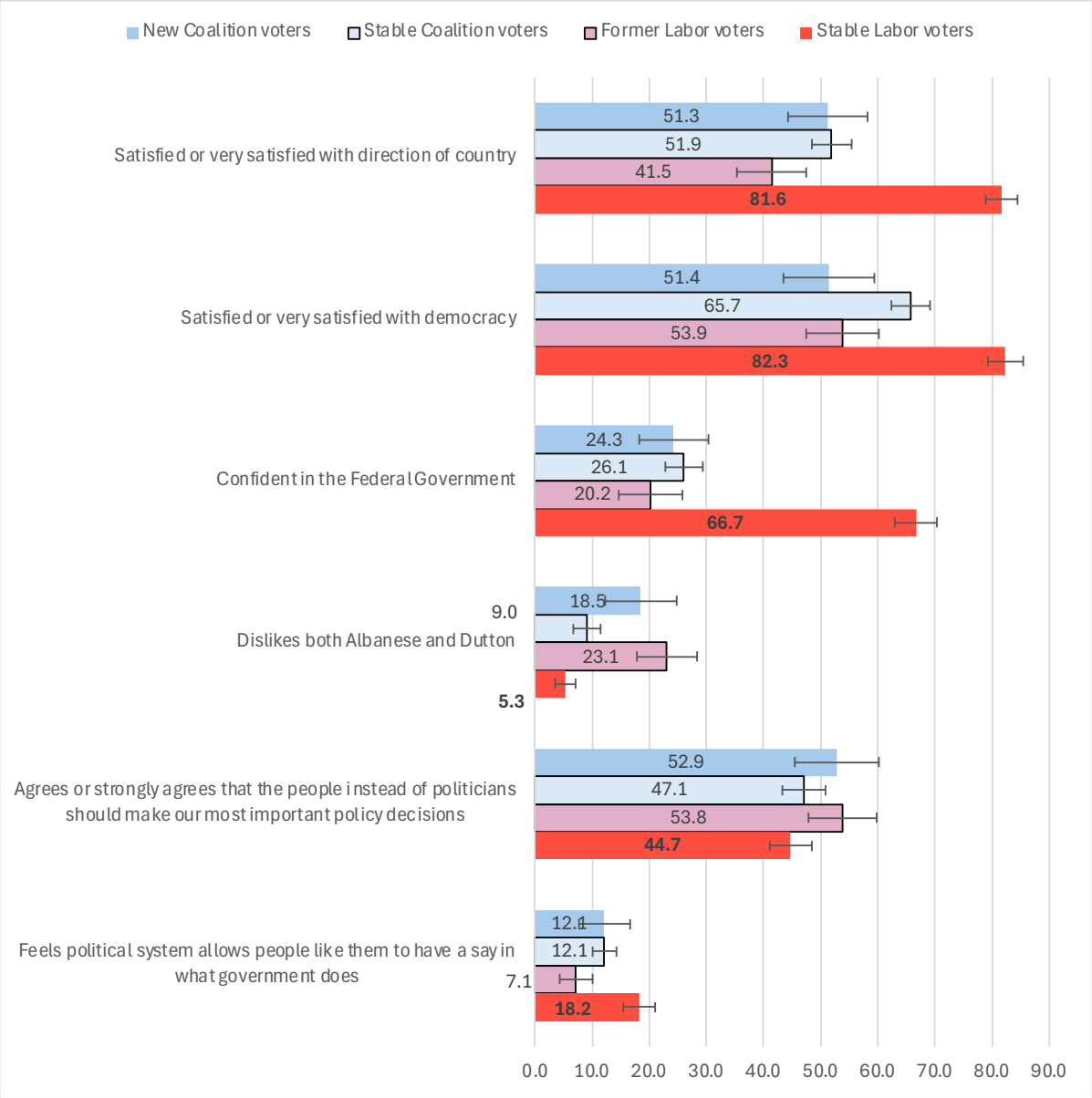
Even more interesting than the size of the flows between the different parties as we enter the 2025 election campaign is the relationship these flows have with the political attitudes we have been discussing throughout the paper. We can see some of these dynamics in Figure 28, which gives the per cent of Australians that report each of the political attitudes across four categories. These categories are:

- New Coalition voters – people who didn't vote for the Coalition in May 2022 but said they would do so when asked in October 2024.
- Stable Coalition voters – people who voted for the Coalition in May 2022 and said they would do so when asked in October 2024.
- Former Labor voters – people who voted for Labor in May 2022, but said they wouldn't when asked in October 2024
- Stable Labor voters – people who voted for Labor in May 2022 and said they would when asked in October 2024.

The first and third category are reasonably small in the sample, so the confidence intervals are quite wide. Furthermore, these two categories are not mutually exclusive, as some of those who stopped being Labor voters will have become Coalition voters. It is important not to make causal inference based on this data. It may be that political attitudes predict voting flows, or that voting flows predict political attitudes. It may even be the case that there is a third factor that influences both. Nonetheless, even the cross-sectional relationships can reveal something about the dynamics of the electorate.

Comparing first the new Coalition voters with the stable ones, the latter are substantially more likely to be satisfied with democracy (65.7 per cent) compared to the former (51.4 per cent). They are, however, far less likely to be 'double haters' (9.0 per cent of stable Coalition voters compared to 18.5 per cent of new Coalition voters). Looking at the dynamics amongst the two groups that voted Labor in the May 2022 election, there are very large differences in all the political attitudes. Specifically, the former Labor voters have far more negative attitudes than stable ones, and in certain cases (satisfaction with the direction of the country, satisfied with democracy, 'double hater', political efficacy) have more negative attitudes than those that said they would vote for the Coalition in both periods.

Figure 28 Political views for four voting flow categories, May 2022 and October 2024



Note: The "whiskers" indicate the 95 per cent confidence intervals for the estimate

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

7.3 Views on the Voice to Parliament, 12 months later

As mentioned in the introduction to this paper, the referendum on the Aboriginal and Torres Strait Islander Voice to Parliament (the Voice) was the lefthand side bookend to the 'biggest election year in history.' Ultimately, the No vote prevailed in the referendum, with only 39.9 per cent of legal votes being in favour of the change. Biddle et al. (2023) analysed in depth the factors associated with the vote, however we asked a number of related questions in Wave 1 of the 2025 Election Monitoring Survey Series, almost exactly 12 months after the date of the referendum.

In the analysis presented below, we weight the data to the actual referendum result (as well as age, sex, education, and employment), based on response to the following

question: 'In the Constitutional Referendum held on Saturday 14 October 2023, did you vote YES or NO for the Voice to Parliament?' We exclude those that said they voted 'Informal/didn't vote', as well as those that were not eligible, not sure, or preferred not to say.

Our first question asked, 'If the Constitutional Referendum was held **today**, would you vote YES or NO for the Voice to Parliament?', with **bold** in the original question. We find very little change in views towards the Voice, weighting on past vote and excluding those that were not eligible. Across Australian adults, 38.0 per cent would vote yes if the referendum was held again, 12 months later. While this difference is statistically significant, in magnitude it is only a small change over a 12-month period.

This stability is also apparent when we compare responses at the individual level. Of those that said they voted no in October 2023, only 3.5 per cent said that they would vote yes if the referendum were held 12 months later. Of those that said yes, on the other hand, 90.8 per cent said that they would vote yes again. In net terms, there has been more movement from yes to no than from no to yes, but the actual change in vote is quite small (and much smaller than the change between vote in the 2022 election and current voting intentions).

The factors that are associated with what a person's referendum vote would be if asked again in 2024 are quite similar to those identified after the actual October 2023 referendum. Weighting by 2023 vote:

- Younger Australians were more likely to say they would vote yes (56.3 per cent for those aged 18 to 24) than older Australians (18.8 per cent for those aged 75 years and over)
- Females (40.4 per cent) were more likely to say they would vote yes than males (35.4 per cent)
- Those with a degree (52.5 per cent) were more likely to say they would vote yes than those that have completed Year 12 but don't have a degree (34.5 per cent) and those that have not completed Year 12 (24.6 per cent)
- Those born overseas in a non-English speaking country (43.0 per cent) were more likely to say they would vote yes than those born in Australia or in an English-speaking country (37.5 per cent)
- Those that live outside of a capital city (30.5 per cent) were less likely to say they would vote yes than someone living in a capital city (41.5 per cent)
- Those that speak a language other than English at home (50.3 per cent) are more likely to say they would vote yes than someone who speaks English only (35.7 per cent).

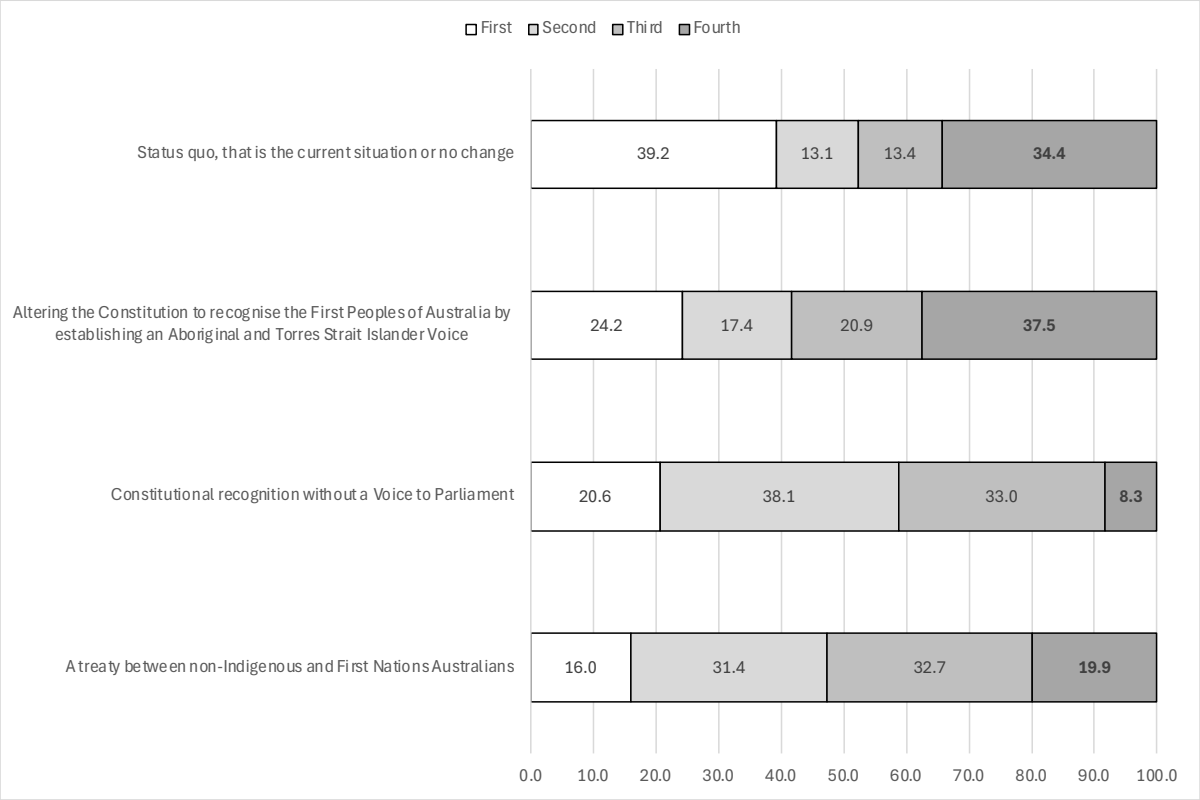
Perhaps not surprisingly given the partisan nature of the voice campaign, there is a strong relationship between how someone voted on the Voice to Parliament and how their voting intentions have change since the May 2022 Federal Election. Using the same grouping of voters as in Figure 28 and weighting by October 2023 Voice vote, only 20.2 per cent of Australians that switched their vote to the Coalition over the period voted Yes in the referendum. This is slightly below the 22.7 per cent of stable Coalition voters, but the difference isn't statistically significant. However, amongst those who switched their vote from Labor to another party, only 37.1 per cent voted Yes in October 2023, compared to 64.2 per cent of stable Labor voters.

Even if there was a large increase in support for a constitutionally enshrined Aboriginal and Torres Strait Islander Voice to Parliament, it is highly unlikely that there would be another referendum any time soon, or ever. However, there is a general recognition across all sides of politics that policy is not working with regards to Aboriginal and Torres Strait Islander Australians. Detailed policy changes are beyond the scope of this wave of the 2025 EMSS, but we did ask respondents: 'Thinking still about the current political situation of Aboriginal and Torres Strait Islander Australians, please rank the following scenarios from most preferred option (1) to least preferred option (4)?' Figure 29 gives the per cent of Australians that ranked each of the four options first through to fourth, weighting by October 2023 referendum vote, and excluding those that were not eligible to vote in the referendum.

Keeping in mind that the options were focused on constitutional or legal changes, the 'status quo' was the option with the most first-preference responses (39.2 per cent). However, it was also the option with the second highest number of last preference responses (34.4 per cent). On the other hand, something similar to the Voice to Parliament that was the subject of the referendum had the highest number of last preference responses (37.5 per cent) but the second highest number of first preference responses (24.2 per cent). These two possible scenarios polarise opinion.

If we combine first and second preferences, then Constitutional recognition without a Voice to Parliament has at least moderate support amongst the highest proportion of people (58.7 per cent of people in total). On the other hand, only 16.0 per cent of Australians support a treaty, though there is a relatively low per cent of people that ranked it fourth (19.9 per cent).

Figure 29 Preference ordering for scenarios related to Aboriginal and Torres Strait Islander Australians, October 2024



Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

8 Summary and concluding comments

In this paper, we report on results from a survey conducted October 2024 that explores the perceptions of Australians towards democracy and political institutions, as well as their voting intentions ahead of the 2025 Federal Election.

Leading up to the 2025 Federal Election, and in comparison to voters leading up to the UK and US elections in 2024, most Australians report a reasonable level of satisfaction with the direction of the country. More than three-in-five Australians report that they are satisfied or very satisfied, rising to more than two-thirds of those aged 18 to 34 years. While dissatisfaction is not as low as in other countries, it is worth noting that dissatisfaction around 6 months out from the next Federal Election (if Parliament goes to full term) is more or less the same as dissatisfaction was in April 2022 in the ANUpoll series of surveys, just prior to the Morrison government losing the subsequent election.

Unlike countries where populist parties or leaders have had electoral success, the Australian population also tends to be reasonably satisfied with democracy itself. In October 2024, 64.0 per cent of Australians were satisfied or very satisfied. Where there are potential concerns with this measure is the variation by education. Only 60.1 per cent of those that have not completed Year 12 are satisfied/very satisfied with democracy. This rises to 62.6 per cent for those who have completed Year 12 but do not have a degree, and even further to 69.2 per cent of those with a degree. If those with relatively low levels of education do not see democracy working for them, then there is a real risk that they

will direct their support to parties that have weaker ties to democratic norms and institutions.

There is already evidence that trust in some institutions is declining. The judiciary is the most trusted institution of the seven that we considered (63.5 per cent trusted somewhat or completely), but this figure has declined since the 2022 federal election (down from 78.1 per cent). Social media, though improving slightly, remains the least trusted institution. Trust varies significantly by education, with higher trust levels observed amongst those with a university degree.

Australians appear reluctant to identify as either left or right on the political spectrum, with 41.9 per cent of Australians identifying as being exactly in the centre of the distribution. Of the remainder, 23.3 per cent gave a value of 0 to 4 (left-wing) whereas 34.8 per cent gave a value of 6 to 10 (right-wing). A key finding was that satisfaction with democracy and trust in institutions are generally higher among left-leaning individuals with centrists tending to have a lower levels of trust and confidence.

Economic pressures and social isolation have a strong association with political attitudes. Over three-in-ten Australians report they are finding it difficult to get by on their current income, with younger and middle-aged groups particularly affected. Financial stress correlates with lower satisfaction with democracy and reduced political trust. Similarly, loneliness—experienced by 42% of Australians in some capacity—aligns with disengagement from politics and institutions.

This paper summarises data from the first wave of the 2025 Election Monitoring Survey Series. It is intended that a proportion of respondents be reinterviewed throughout and post-election, alongside new respondents to help balance the sample. We will look at a broader set of political attitudes, and the data will help us track how political attitudes change over the election period.

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Appendix – Survey details and additional tables

Data collection for Wave 1 of the 2025 Election Monitoring Survey Series commenced with a pilot survey on Monday 14th of October. Full data collection commenced on the 15th of October, with data collection finishing on the 25th of October. There were a total of 3,622 respondents with a median survey length of 17 minutes. Those who completed the survey between the 14th and 17th of October were incorrectly not asked the last question in the survey on language spoken at home. After this date, this question was added to the survey, and those that missed that question were re-contacted for their language details.

Survey weights were used in the analysis, using the iterative proportional fitting or raking method, implemented in STATA.[15] Population benchmarks that are used for weighting purposes (unless otherwise stated) are age, sex, education, and current employment. The first two of these measures comes from population estimates from the Australian Bureau of Statistics, the third (education) from the 2021 Census, and the fourth (employment) from the September 2024 Labour Force Survey.

Only those that stated their age and sex were included in the analysis. Those that gave a sex other than male or female were included in analysis apart from sex-based cross-tabulations, with the weight for those that reported they were either Non-binary or that 'I use a different term' based on the sample proportion. Missing values for employment and education were imputed for weighting purposed only using the *mi impute chained* command in STATA, with random seed set to be 10121978. Confidence intervals in the analysis are calculated using bootstrap standard errors with 250 replications.

The remainder of this section includes appendix tables for data presented in figures in the

Table A1 Change in voting intentions between the May 2022 election and October 2024

Vote in 2022 election	Voting intentions in October 2024					
	Coalition	Labor	Greens	Other	Don't know	Total
Coalition	31.9	1.8	0.3	0.7	1.0	**35.7**
Labor	4.2	23.2	2.1	1.2	1.9	**32.6**
Greens	0.7	1.3	9.6	0.4	0.3	**12.3**
Other	4.4	1.5	0.7	11.4	1.5	**19.5**
Total	**41.2**	**27.8**	**12.6**	**13.7**	**4.6**	**100.0**

Source: Wave 1 of the 2025 Election Monitoring Survey Series, October 2024

Endnotes

[1] https://www.undp.org/super-year-elections

[2] https://www.theaustralian.com.au/commentary/anthony-albanese-has-lost-the-newspoll-2pp-lead-at-the-worst-possible-time-for-his-government/news-story/b2d934a5a2eb6963d020565b584cc00b

[3] https://www.aec.gov.au/media/2023/11-27.htm

[4] https://www.pewresearch.org/politics/2024/10/24/confidence-in-voting-access-and-integrity-expectations-for-whether-and-when-the-election-results-will-be-clear/

[5] https://www.yahoo.com/news/poll-free-fair-election-181003736.html

[6] https://www.theoru.com/panels.htm

[7] https://dataverse.ada.edu.au/dataverse/anupoll

[8] https://srcentre.com.au/lifeinaustralia/panel/

[9] https://www.axios.com/2024/06/15/double-haters-biden-trump-favorability

[10] https://psychology.org.au/for-members/publications/inpsych/2018/august-issue-4/is-loneliness-australia-next-public-health-epide

[11] https://www.aihw.gov.au/mental-health/topic-areas/social-isolation-and-loneliness

[12] https://www.unimelb.edu.au/newsroom/news/2024/february/hilda-data-shows-psychological-distress-rising,-loneliness-highest-amongst-young-people

[13] https://results.aec.gov.au/27966/Website/HouseStateTppFlow-27966-NAT.htm

[14] https://results.aec.gov.au/27966/Website/HouseResultsMenu-27966.htm

[15] https://www.pewresearch.org/methods/2018/01/26/how-different-weighting-methods-work/