



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

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

**TRUE ISSUES®**



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## Survey methodology



### National Online Survey

#### n=1,000 Australian adults

- Conducted 20th – 24th February 2020.
- Sample quotas on age, gender and location, with post-survey weighting to actual age / gender / location proportions from 2016 Census.
- Maximum margin of error on n=1,000 is +/-3.1% at the 95% confidence level.
- Differences of +/-1% for net scores are due to rounding.

#### Explanation of index scores:

To facilitate ease of reporting and comparison of results over time, an **index score** has been calculated for performance measures (*very good* to *very poor* ratings).

The index score is represented as a score out of 100.

To calculate this score, the **survey percentage result** for each scale category (excluding 'don't know' responses) is multiplied by an **index factor** to produce an **index value** for each category. These values are then summed to produce the **index score**, equating to 43 in this example.

Rating category	Survey percentage	Index factor	Index value (percentage x factor)
<i>Very good</i>	5%	100	5
<i>Good</i>	17%	75	13
<i>Average</i>	40%	50	20
<i>Poor</i>	19%	25	5
<i>Very poor</i>	15%	0	0
<i>Don't know</i>	4%	-	-
<b>Index score</b>			<b>43</b>



**What are the  
issues  
Australians care  
about?**

# Environment and climate change remains top of mind, matched by broad concern about economic issues



When asked to name up to three issues that personally interest or concern them the most and that the Australian Government should focus on, more than a third (36%) of Australians describe issues related to the environment and climate change.

This is similar to our last True Issues poll taken earlier in the 2019-20 bushfire season (34% in November), but substantially higher than our post-Federal election measure (22% in June), when the Royal Commission into Aged Care kept hospitals, healthcare and ageing most top-of-mind.

As this summer's catastrophic fire season gave way to wild storms and floods, Australians' thoughts turned to the public debate around the recovery of affected communities, vegetation and wildlife, the legacy of the long period of drought, the role of climate change in extreme weather events, and the need to address carbon emissions.

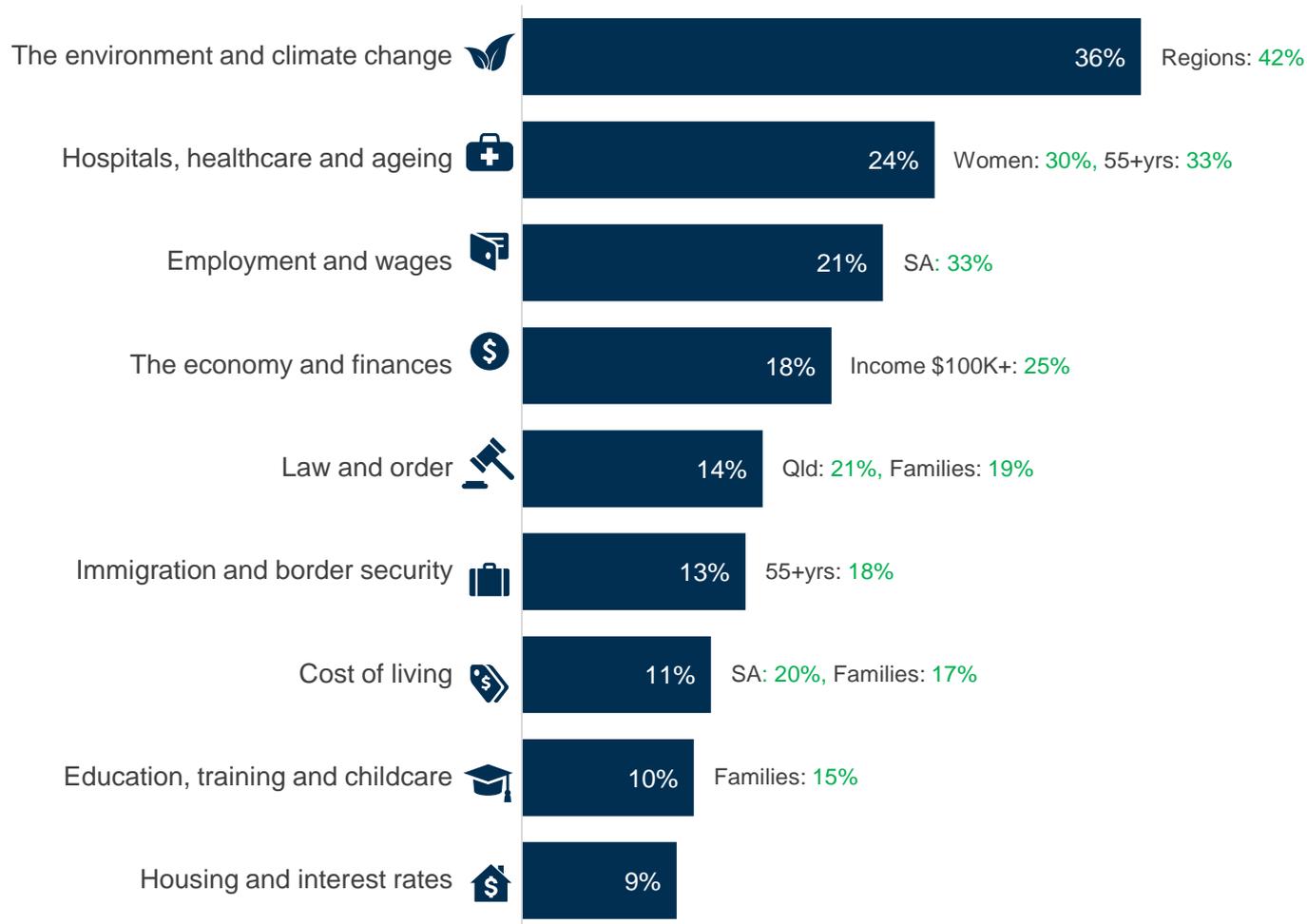
Hospitals, healthcare and ageing (24%), employment and wages (21%), and the economy and finances (18%) remain the next most important issues on Australians' minds, tapping into public anxiety about the quality and affordability of health and aged care, and the general outlook for business and the economy over 2020. Further, the total number of Australians who want a focus on the economy, employment, or cost of living is four in ten (41%) – indicating a broad widespread concern about economic issues.



# Environment and climate change, healthcare and ageing, employment and the economy lead top-of-mind concerns



## Most important issues the Australian Government should focus on (Top 3 most important – unprompted)



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

Q. What are the most important issues that you think the Australian Government should focus on? These would be the issues or problems that personally interest or concern you the most.

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





# Cost of living and healthcare still lead concerns, but calls continue for more focus on environment and climate change



Cost of living (59%) and hospitals, healthcare and ageing (53%) remain Australians' top prompted priorities for Government attention. The environment and climate change (42%), employment and wages (42%), and the economy and finances (35%) continue to round out the top five.

While not a statistically significant increase on this sample size from November 2019 (38%), concern about the environment and climate change continues a longer-term trend of growth – at nine points higher than in February and June 2019 (33% each).

- Notably, concern is strongest in South Australia where a majority (59%) put the environment and climate change in their top five issues for focus.

In contrast, concern about hospitals, healthcare and ageing continues to edge off after a sustained period of public debate following the Royal Commission. While still a leading issue in February 2020, at 53%, healthcare and ageing is seven points lower than 12 months ago.

Overall, public priorities for Government attention are in line with November, with education, training and childcare, energy, immigration and border security, housing and interest rates, and the provision of public services continuing to complete the top ten most important issues to Australians.

On other issues – after peaking in November following sustained coverage of the drought and its role in the severity of fires in NSW and Queensland, concern about agriculture and regional development dropped back to previous levels (13% top five issues, down from 18%).

The concerns of Generation X (35-54 years) follow the national trend. However, a majority (54%) of Millennials (18-34 years) are concerned about employment and wages – this is their second leading issue, behind cost of living. Education, training and childcare (39%) is a top five issue for this Millennials, instead of the economy and finances, and a rebound in key housing markets means many Millennials see a need for more Government focus on housing and interest rates (32%, higher than the national average of 24%).

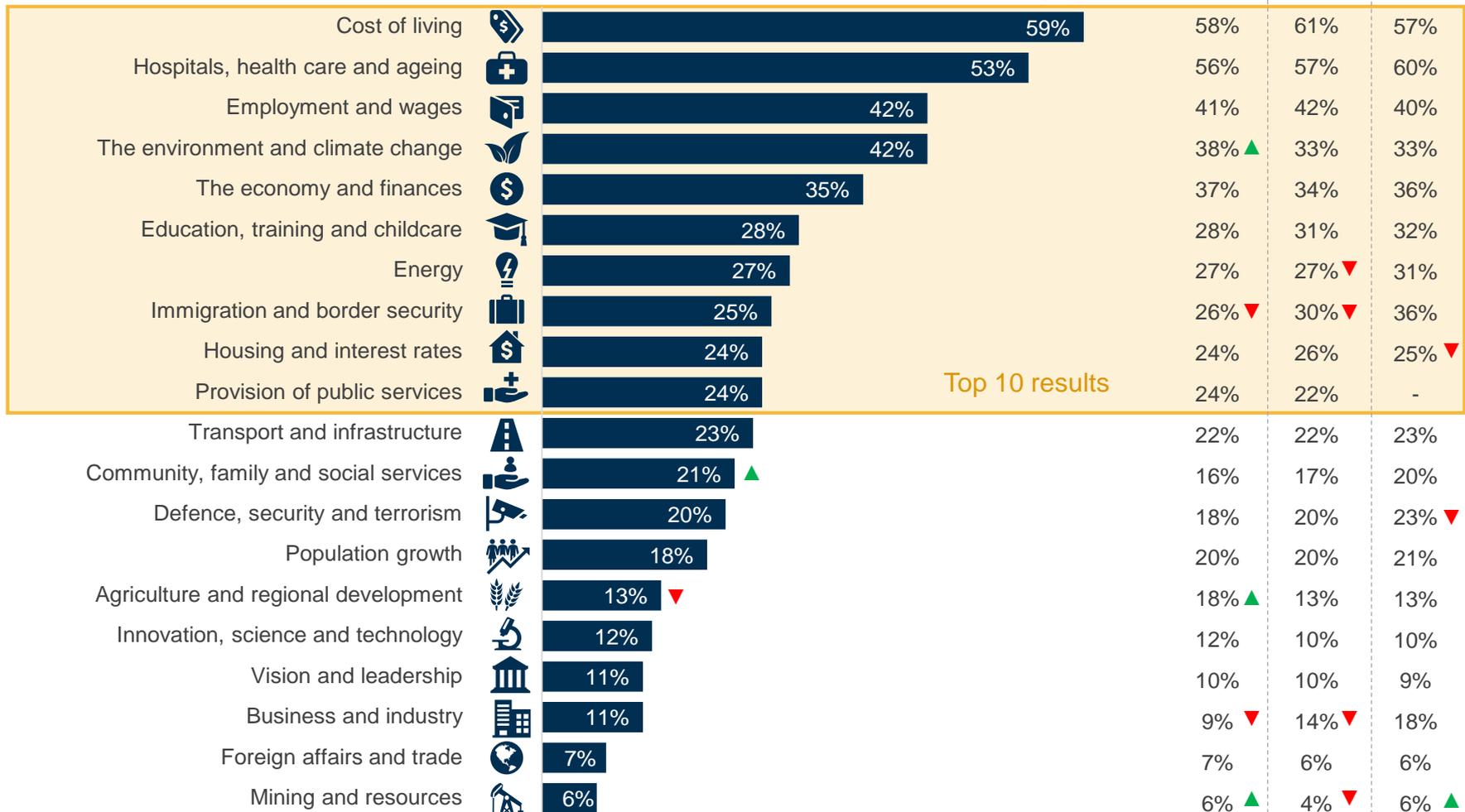
In contrast, hospitals, healthcare and ageing continues to lead among older adults aged 55+ years (65%) and energy (36%) is among their top five issues. Employment and wages is a lesser concern for this pre-retirement and retirement-aged cohort.

Energy is also a top five concern in NSW (34%) and regional areas (33%).

# Living costs, healthcare and ageing remain top issues, and more are now concerned about the environment than economy



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

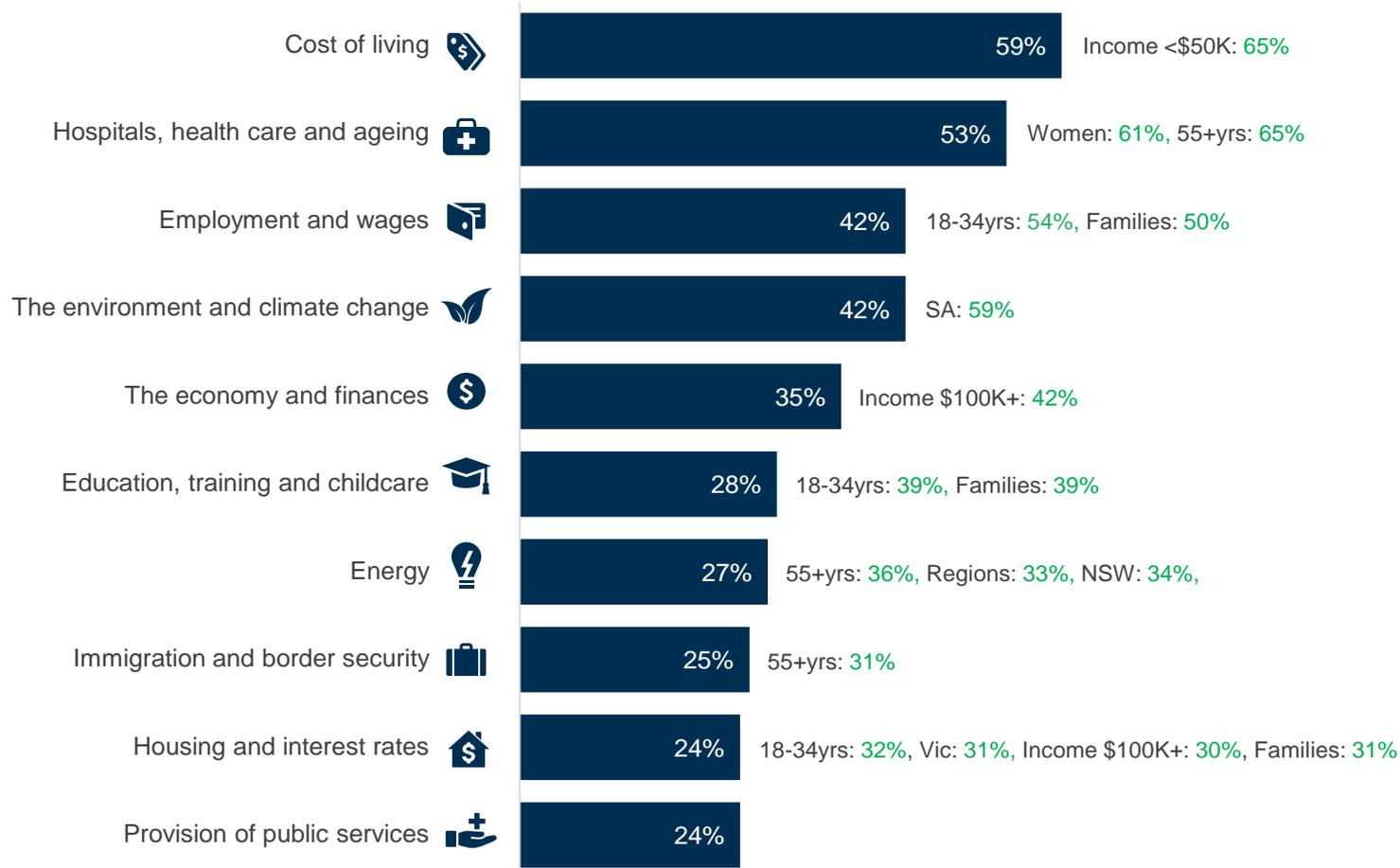


\* Added in June 2019. # Changed from 'Vision, leadership and quality of government' in November 2019.

Significantly ▲ higher / ▼ lower than previous True Issues wave at the 95% confidence interval. Q. From the following list, please select the five most important issues you think the Australian Government should focus on. Base: All respondents (n=1,000).

# Millennials (18-34yrs) more concerned about employment, education and housing, over 55s with healthcare and energy

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



Significantly higher than the national total at the 95% confidence interval.  
Q. From the following list, please select the five most important issues you think the Australian Government should focus on.  
Base: All respondents (n=1,000).



**Are we headed in  
the right  
direction?**

# Australians more optimistic about their own situation but not about the direction of business and the economy



At the start of the new Parliamentary year, public sentiment about the direction of business and key economies continues to be negative, on balance. However, the new year brings more optimism at a personal level and more Australians feel optimistic about the direction of their local community than pessimistic.

After a less optimistic outlook in November 2019, Australians now have a more positive view of their own personal situation: 36% (up from 31%) feel they are heading in the right direction, twice as many as feel they are heading in the wrong direction (18%). This improved sentiment is similar to how people were feeling in June 2019, after the Federal election.

While, on balance, Australians are optimistic about their local community, only 29% feel their local community is heading in the right direction more hold a neutral view (43%) and almost one in five (19%) continue to feel their local community is heading in the wrong direction.

Confidence in business and industry remains in the negative, with more saying it is heading in the wrong direction (26%), than right direction (21%). It is a similar result for the national economy, which 35% see heading in the wrong direction versus only 22% in the right direction.

Across the states, more than twice as many South Australians and Queenslanders continue to see their state economies heading in the wrong direction (36% and 34%, respectively) than headed in the right direction (16% each). Western Australians are similarly pessimistic about their state economy (29% right direction, 20% wrong direction).

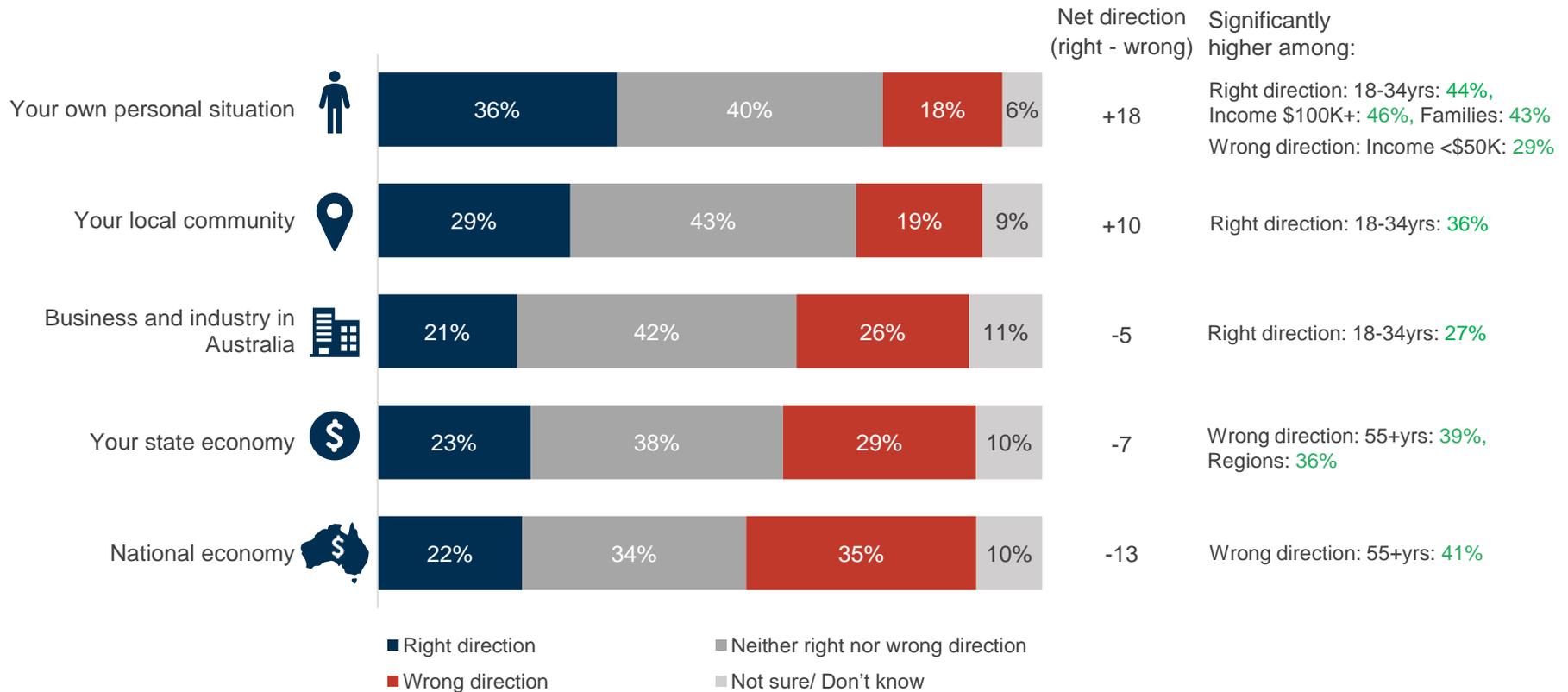
Similar to November, Victorians remain split on their economy's direction (26% right direction, 27% wrong direction).

Only NSW has seen a significant improvement in public sentiment – 28% (up from 20%) now see their state economy as heading in the right direction, compared with 25% in the wrong direction.

# Australians remain more confident about their own and their community's future than for business and economy



## Direction of organisations and groups in Australia

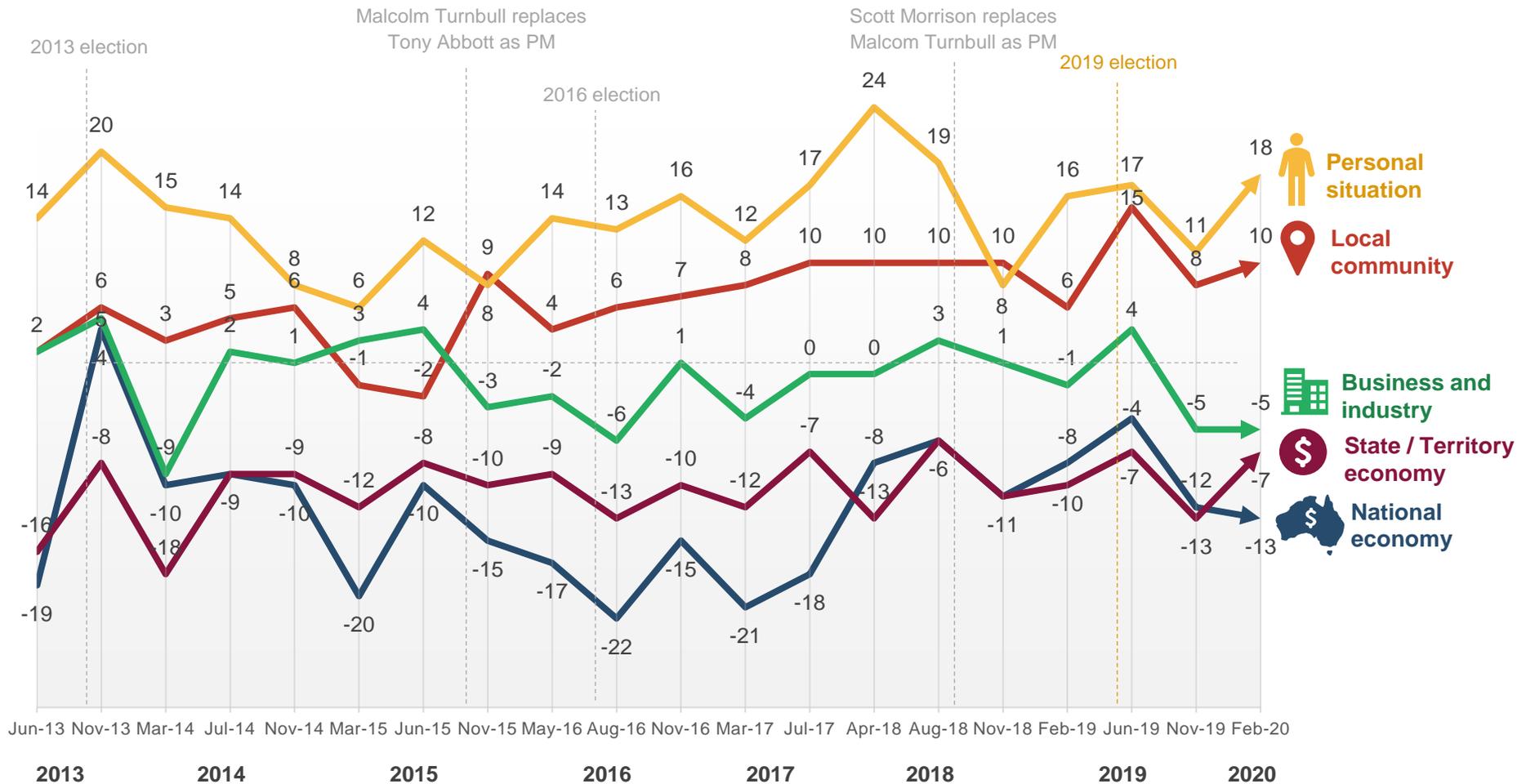


Significantly higher than the national total at the 95% confidence interval.  
 Q. Do you think each of the following is generally headed in the right or the wrong direction?  
 Base: All respondents (n=1,000).

# Australians more positive about their personal situation and less pessimistic about State and Territory economies



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



Q. Do you think each of the following is generally headed in the right or the wrong direction?  
 Base: All respondents (n=1,000).

# How does the Australian Government perform on top issues?

# Govt performance stable across key areas – still strongest on defence, weakest on living costs and the environment



Government performance across key areas remains relatively steady, with most areas rated within 1-2 index points of their November 2019 result. Defence, security and terrorism, provision of public services, and agriculture and regional development are each up three index points from November, regaining levels closer to their June 2019 result.

Defence, security and terrorism remains the Federal Government's best performing area overall (index of 59). The Government also continues to perform reasonably well on business and industry (index of 52), foreign affairs and trade, immigration and border security, mining and resources, and innovation, science and technology (index of 51 for each).

However, areas such as cost of living (index of 34) and the environment and climate change (index of 38) continue to attract poorer ratings, remaining prominent in Australians' minds as important areas requiring more Government attention.



# Government performance remains strongest on defence and recovers ground on service provision and agriculture



## Australian Government performance on issues (Performance index<sup>^</sup>)

		Feb 2020	Nov 2019	Jun 2019	Feb 2019
Defence, security and terrorism		59	56	58	56
Business and industry		52	51	52	51
Foreign affairs and trade		51	52	52	51
Immigration and border security		51	50	49	49
Mining and resources		51	50	51	50
Innovation, science and technology		51	49	51	49
Education, training and childcare		48	47	49	47
Provision of public services*		48	45	47	-
The economy and finances		47	46	48	48
Transport and infrastructure		47	46	48	45
Community, family and social services		47	<b>Top results</b>	46	45
Housing and interest rates		44	43	43	41
Population growth		44	42	43	43
Agriculture and regional development		44	41	45	41
Employment and wages		42	41	41	43
Hospitals, health care and ageing		42	40	43	41
Vision and leadership#		40	42	42	35
Energy		40	38	38	37
The environment and climate change		38	39	40	41
Cost of living		34	34	34	35

\* Added in June 2019. # Changed from 'Vision, leadership and quality of government' in November 2019.

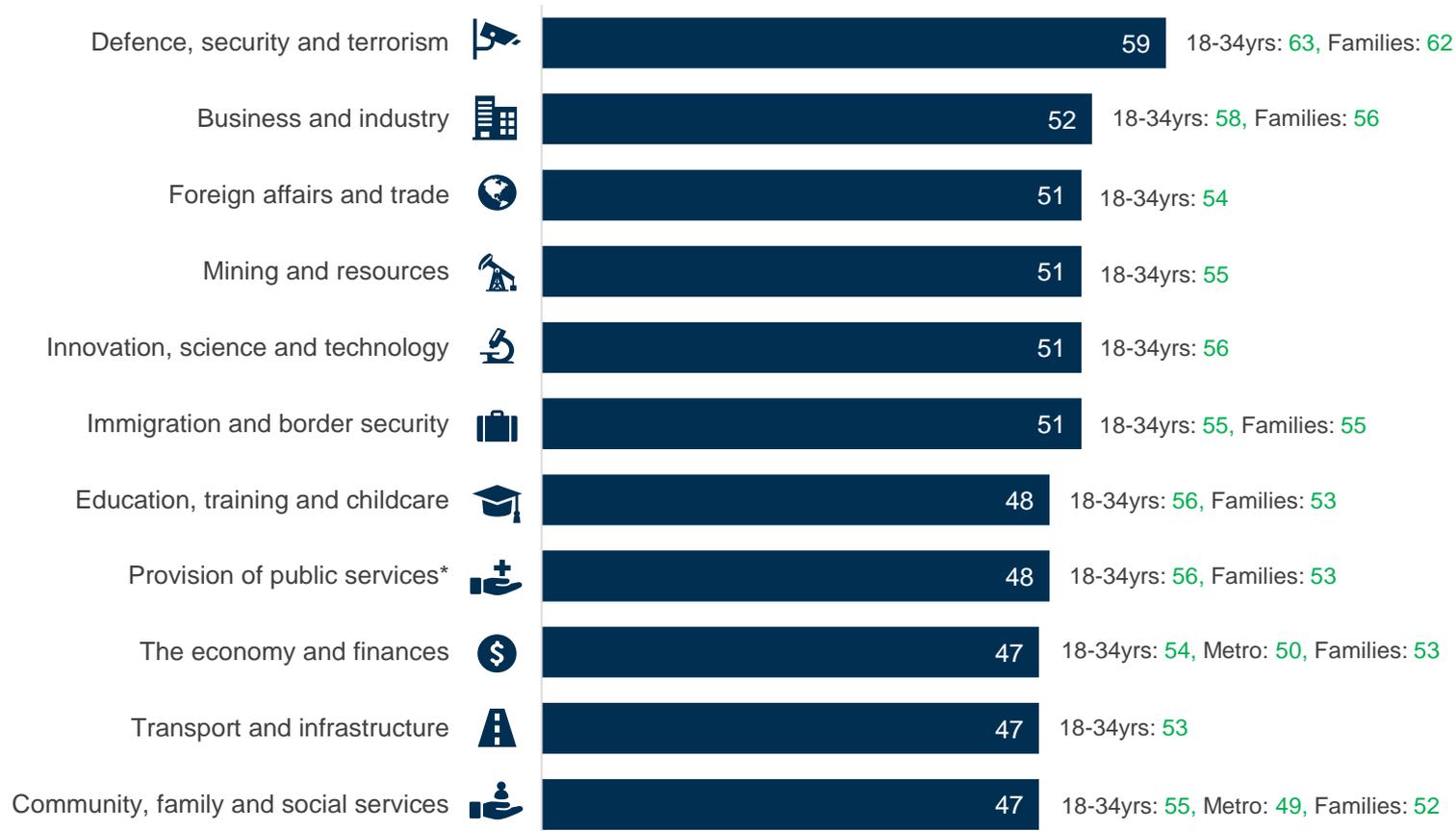
<sup>^</sup> For an explanation of how index scores are calculated refer to the survey methodology section of this report.

Q. How would you rate the performance of the Australian Government on each of the following issues? Base: All respondents (n=1,000).

# Millennials continue to rate government performance more favourably on average



## Top ranked issues for Australian Government performance (Performance index<sup>^</sup>)



\* Added in June 2019 ^ For an explanation of how index scores are calculated refer to the survey methodology section of this report.

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

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

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



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

# Federal Government performance flat after the 2019-20 summer but improved for the NSW Government



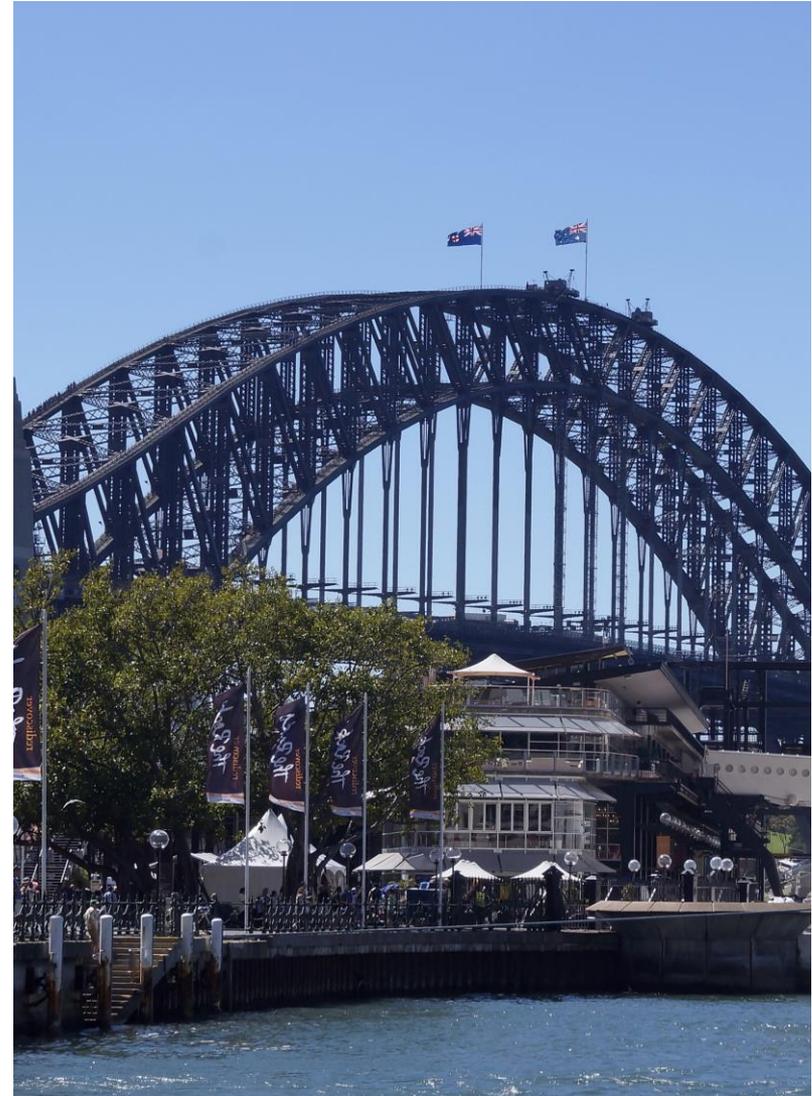
At the end of a challenging summer for Scott Morrison, the electorate rates the Federal Government's performance at an index score of 45, unchanged from November (with the bushfire season well under way), and lower than its post-election peak of 49 last June.

One in three Australians continues to rate the Government's current performance as 'very poor' or 'poor' (34%, similar to 33% in November 2019), and an equal proportion (34%) rate it as 'average'. Only 28% rate Government performance as 'very good' or 'good' (similar to 30% in November).

Business and industry performance (index of 53) continues to be rated more favourably than government, with Local Councils (index of 52) continuing to attract a higher performance rating than both State and Territory (index of 50, up from 47) and Federal Governments.

Across the mainland states, Victorians remain most positive about their State Government (index of 54), while Queenslanders are most negative (index of 43).

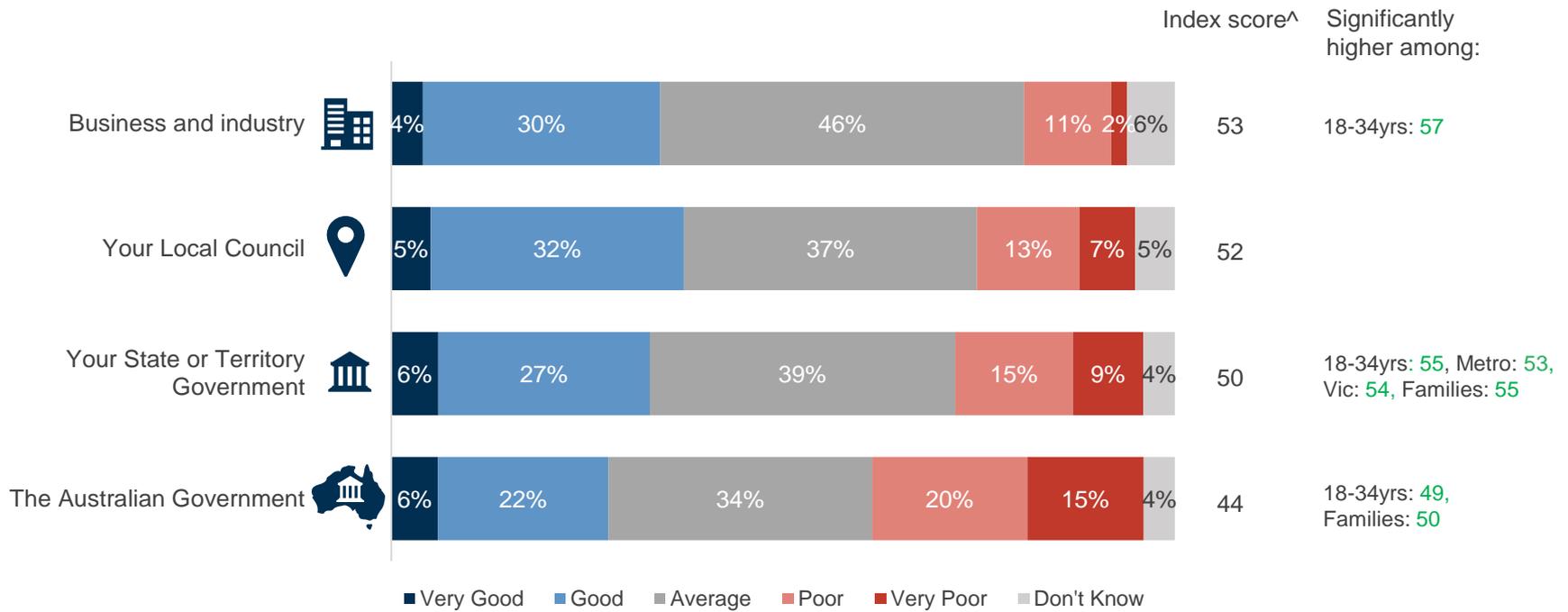
Rated performance of the State Government in NSW has improved since November (index of 52 compared with 46), while in WA it has declined (index of 49 compared with 54).



# Business and local councils continue to outperform State and Federal Governments



## Performance of organisations and groups in Australia



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

<sup>^</sup> For an in-depth explanation of how index scores are calculated refer to the research methodology section of this report.

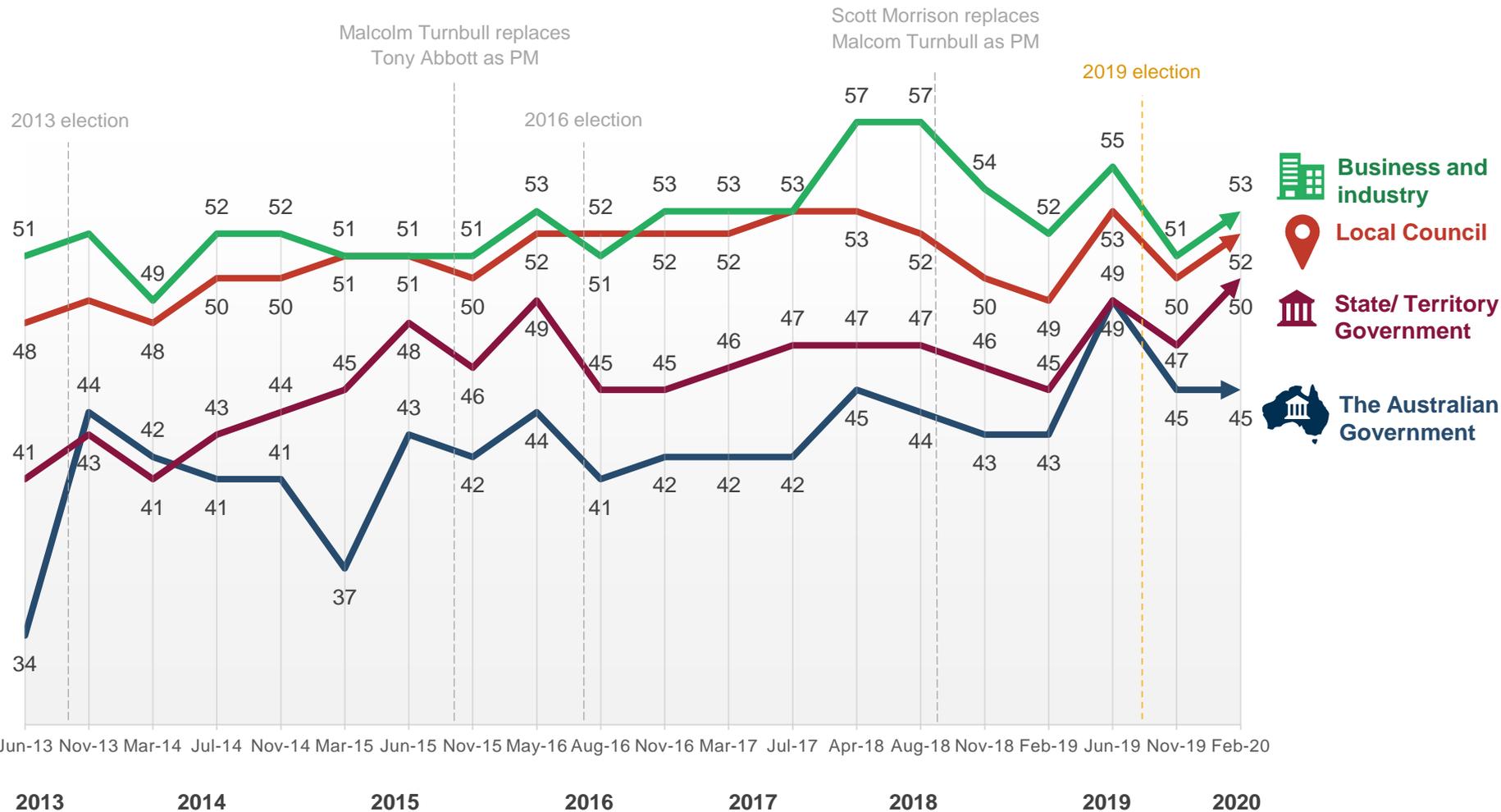
Q. How would you rate the current performance of each of the following organisations or groups in Australia?

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

# Performance ratings recover for business, local and State Governments but stay flat for Federal Government



Performance of organisations and groups in Australia  
Index score trend<sup>^</sup>



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

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