



**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 6th – 11th November 2019.
- 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%	-	-
Index score			43



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

Environment and climate change emerges as Australians' most top-of-mind concern, before health, jobs and economy



When asked to name up to three issues that personally interest or concern them the most and that the Australian Government should focus on, around one third (34%) of Australians describe issues related to the environment and climate change. This is a substantial increase from five months ago (22%), overtaking hospitals, healthcare and ageing (29%), which led community concerns in February and June while the Royal Commission into Aged Care was widely covered and discussed.

Now, as rolling climate change protests, extreme climate events and natural disasters dominate media stories and public debate, policy and planning around: climate change, water security and drought (particularly as it relates to regional and farming areas), conservation and protection, waste and recycling, and renewable energy is top of mind.

Employment and wages (22%) and the economy and finances (20%) remain the next most important issues on Australians' minds, as business conditions and wages continue to feel flat.

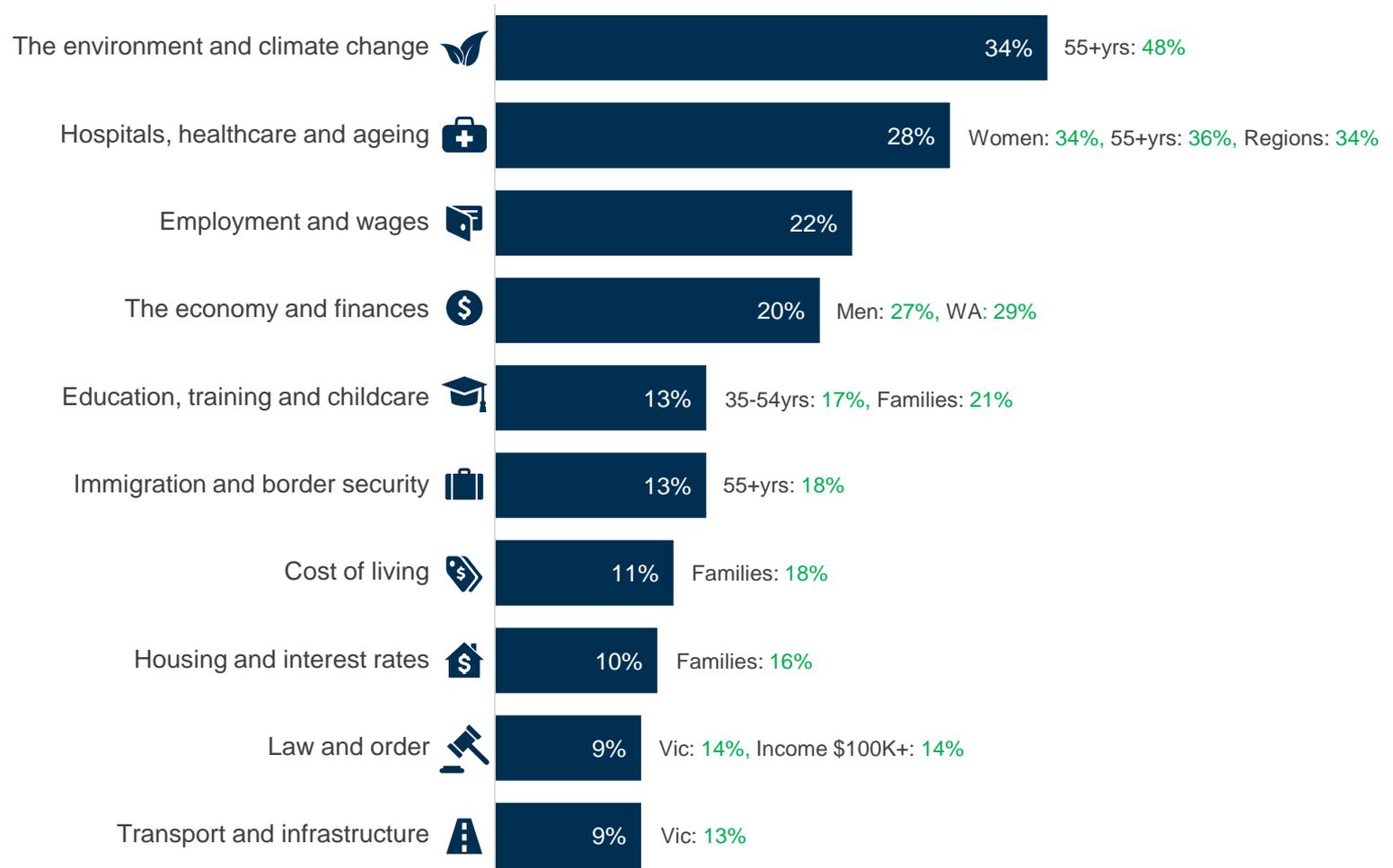
Immigration and border security continues to be less prominent a concern in November 2019, mentioned by 13%, down from 18% in June and 23% in February. As an area generally perceived to have received substantial resources in recent years, Australians are perhaps less keen to see more focus directed this way, at the expense of what they consider more pressing needs.



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).



Leading top-of-mind concerns for everyday Australians – verbatim responses

22% of Australians:



20% of Australians:



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 lead concerns, but more Australians worry about the environment and the regions



Cost of living (58%) and hospitals, healthcare and ageing (56%) remain Australians' top prompted priorities for Government attention. Employment and wages (41%), the environment and climate change (38%), and the economy and finances (37%) continue to round out the top five.

With extreme weather conditions and climate change more prominent in recent public debate, the environment and climate change and agriculture and regional development are now higher community priorities for Government attention in both metropolitan and regional areas, each up five points nationally since June.

In contrast, immigration and border security continues to fall further down their list of priorities, down four points to 26%, and from 7th to 8th most important, since June. (This compares with 36% and equal 4th in February.)

Generation X (35-54 years) remain most concerned about living costs (65%) and employment and wages (49%), feeling under pressure to manage rising costs of housing, utilities, education and other essentials amid ongoing stagnant wage growth.

Hospitals, healthcare and ageing continues to lead among older adults aged 55+ (68%), regional Australia (66%) and women (64%), who tend to shoulder the bulk of carer responsibilities within families. Millennials (18-34 years) remain more concerned about housing and interest rates (34%) than older groups.

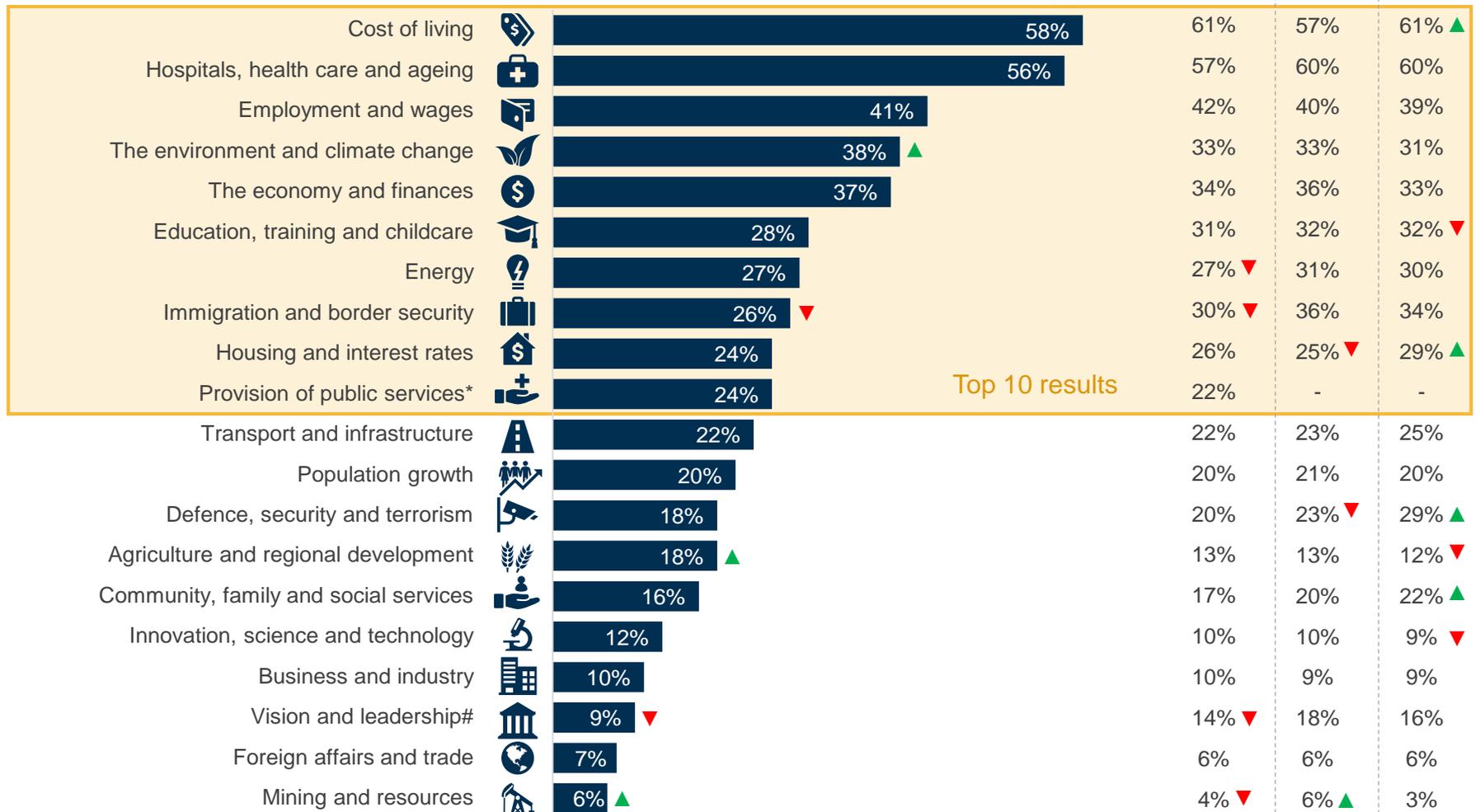
Overall, energy (27%) rates just outside the top five issues on importance and, when asked to decide how much focus should be given to each of three competing priorities in the national energy debate, on average, Australians prioritise energy affordability (38%), ahead of security and reliability (32%) and reducing emissions (30%). This reflects the greater community concern around living costs than environmental issues and climate change.

Heading into another hot summer, energy affordability leads across demographic groups, however there is a slight preference among millennials and Gen X for reducing emissions (32% and 31%, respectively) over energy security and reliability (31% and 29%, respectively). Not so among older adults (55+ years) who prioritise security and reliability (35%), well ahead of emission reduction (27%).

Living costs, healthcare and ageing remain top issues, but increased concern about environment and climate change



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



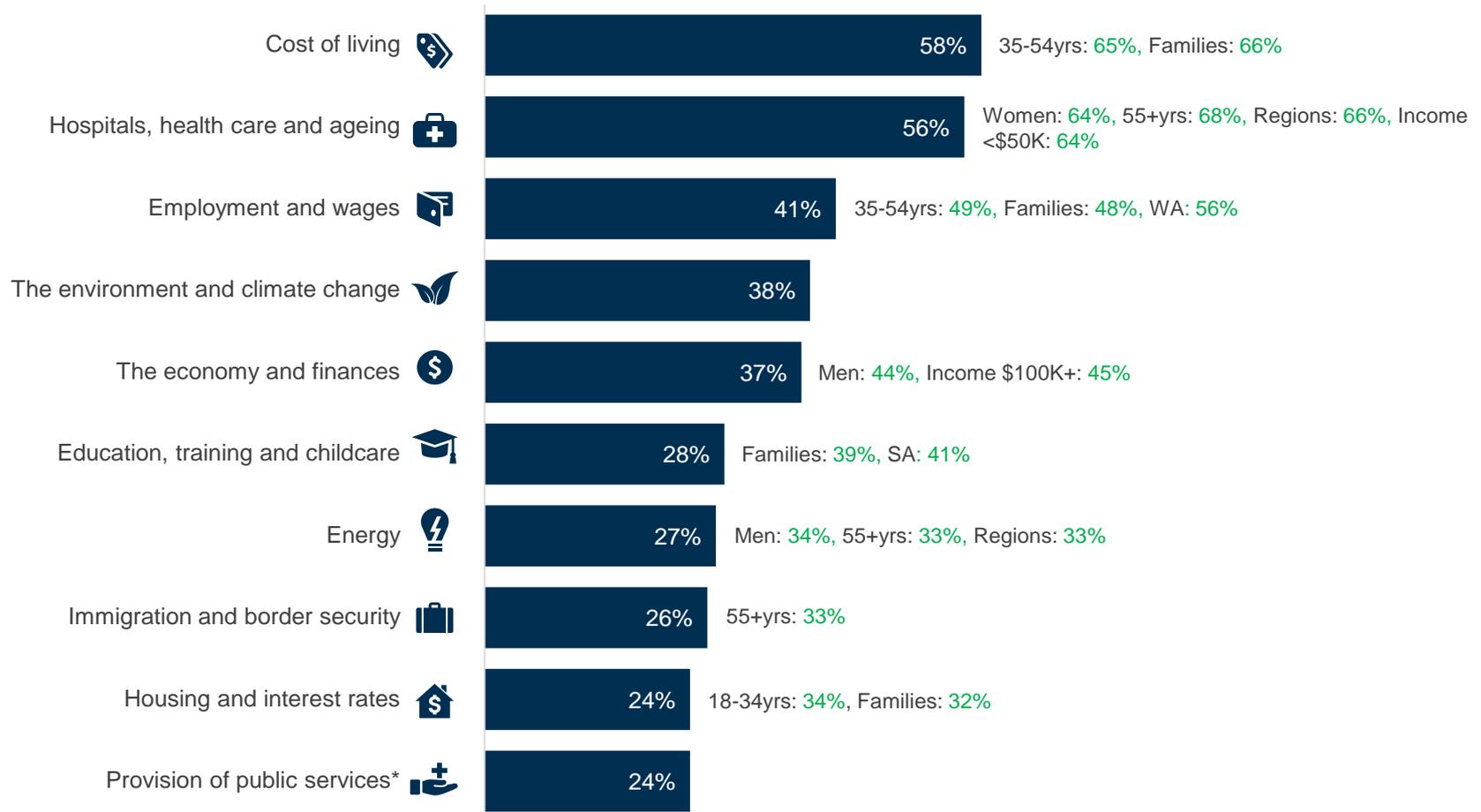
* Added in June 2019. # Changed from 'Vision, leadership and quality of government' in November 2019.

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).

Gen X (35-54 yrs) most concerned about living costs and jobs and wages, over 55s concerned about healthcare



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.

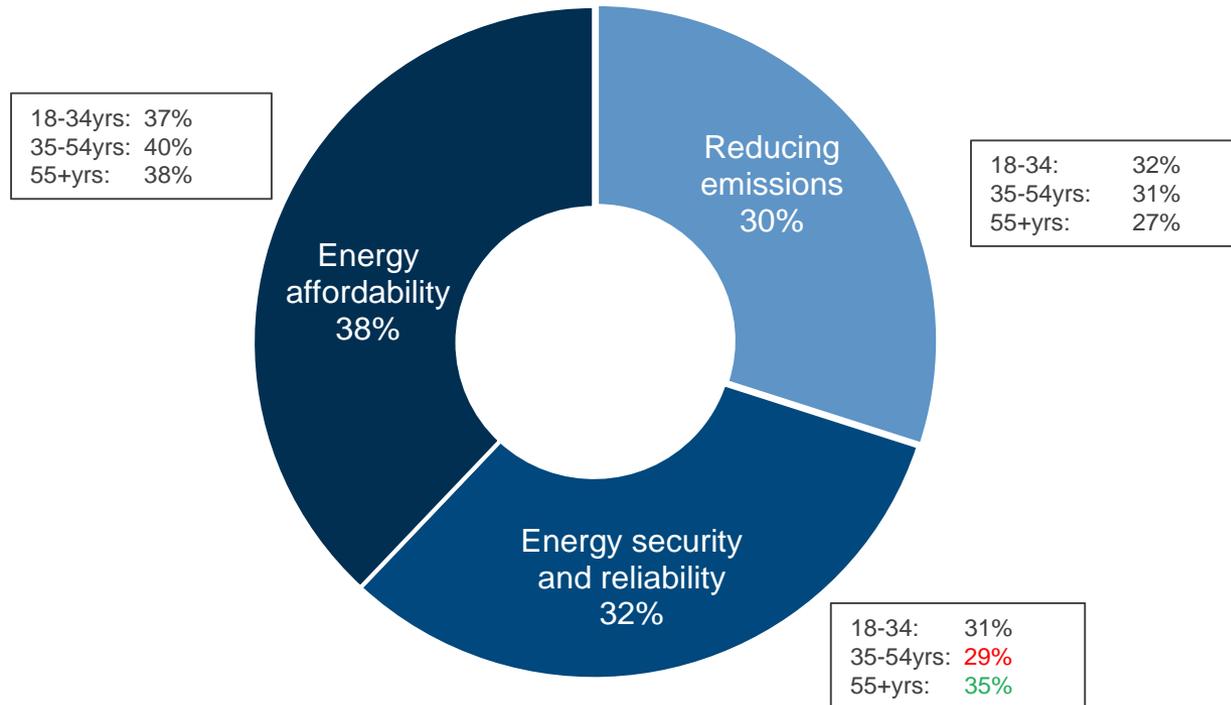
Q. From the following list, please select the five most important issues you think the Australian Government should focus on.

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

On energy, Australians prioritise affordability over security, reliability and reducing emissions



Focus that should be given to each aspect of the national energy market
Average allocated points (out of 100)*



* Excludes 21% who did not provide a response, a higher 32% among 18-34yrs.

Significantly higher / lower than total Australians at a 95% confidence level.

Q. Of the following options, please give a score out of 100 as to how much focus you think each should have in the national energy market.

The total score should add up to 100.

Base: All those who provided a response (n=793).

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



Australians feel less optimistic about the economy, business, their community and their own personal situation



Six months since the Morrison Government was returned to office, there has been a general downturn in sentiment about Australia's direction. However, on balance, more still feel optimistic about their own personal situation and local community than pessimistic.

Three in ten Australians' remain positive about their own personal situation: 31% feel they are heading in the right direction, more than the 20% who feel they are heading in the wrong direction. However, this is a less optimistic outlook than in June, when twice as many saw themselves heading in the right direction (35%) than wrong direction (18%).

After a post-May 2019 election bounce, there has been a pronounced decline in confidence about the future direction of local communities, business and state and national economies.

While, on balance, Australians are optimistic about their local community, this has softened after peaking in June. Fewer now feel their local community is heading in the right direction (27%, down from 32%), more hold a neutral view, and almost one in five (19%) continue to feel their local community is heading in the wrong direction.

Confidence in business and industry has fallen back into the negative since June. More now feel it is heading in the wrong direction (25%, up from 20%), than right direction (20%, down from 24%).

Similarly, compared with five months ago, more now see their national (34%, up from 29%) and state and territory economies (35%, up from 30%) heading in the wrong direction. Only two in ten Australians (22% and 21%, respectively) see them heading in the right direction.

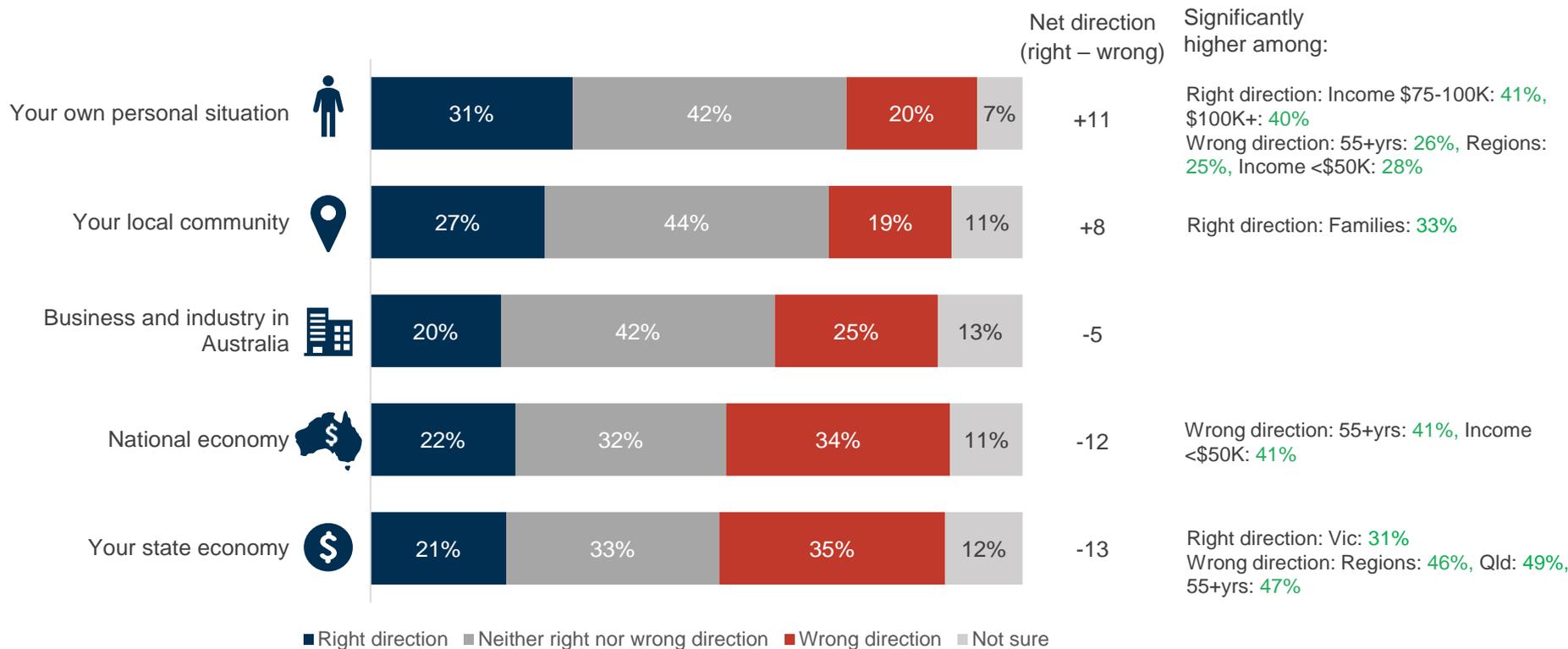
This has pushed the net direction rating of both national (-12) and state and territory (-13) economies further into negative territory, with both ratings now slightly worse than this time last year (-11 each).

Across the states, almost half of Queenslanders (49%) and South Australians (44%) see their state economies headed in the wrong direction. Victorians are most positive overall with an equal number who feel their state is heading in the right direction (31%) as the wrong direction (31%).

Australians remain more confident about their own future than for national and state economies and business



Direction of organisations and groups in Australia

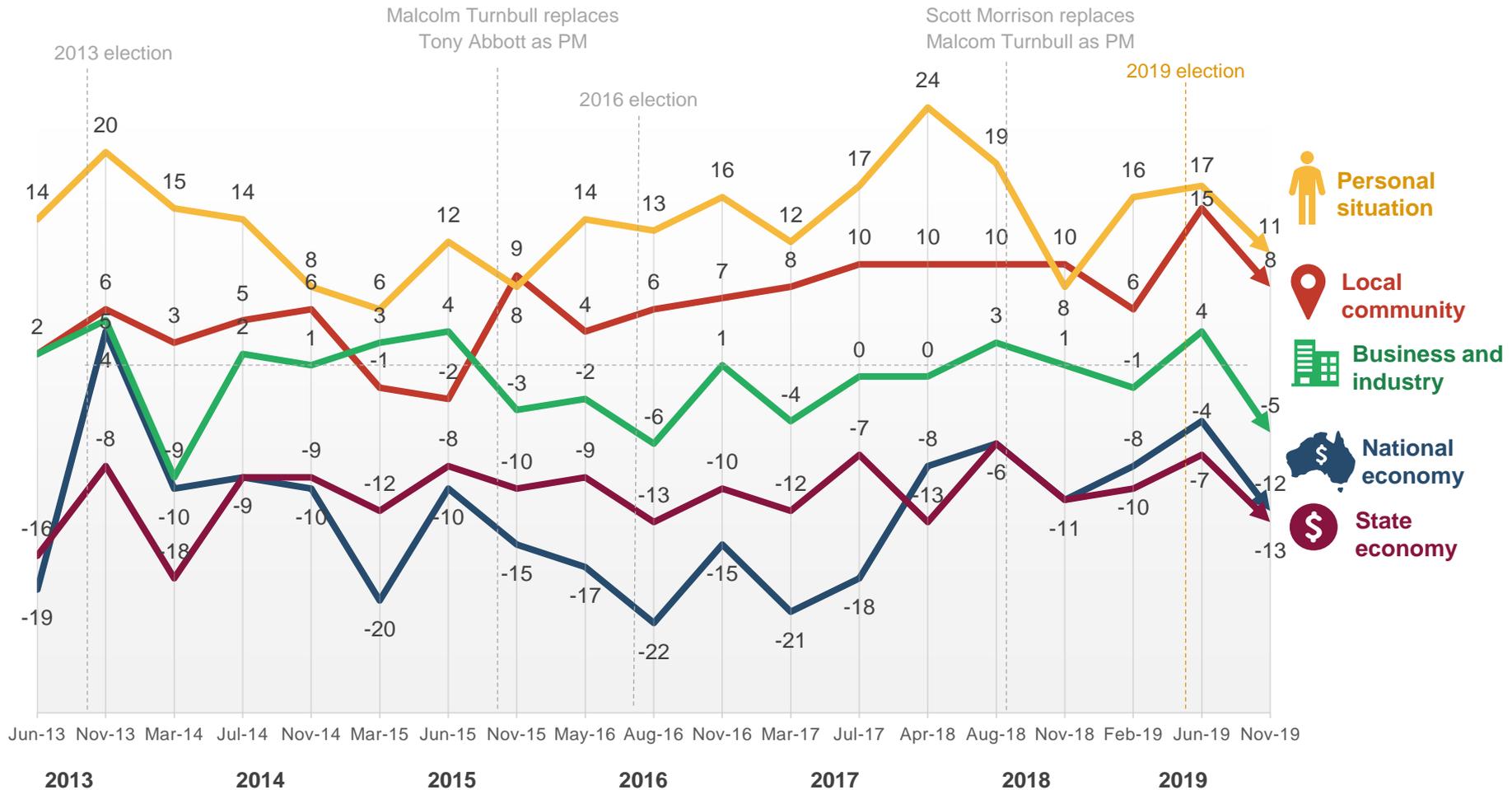


Significantly higher than the national total at the 95% confidence interval.
 Q. Do you think each of the following is generally headed in the right or the wrong direction?
 Base: All respondents (n=1,000).

After a post-election boost, Australians now much less optimistic about their future



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 is stable across key areas but weaker on agriculture and the regions, healthcare and ageing



Six months after its election win, Government performance across key areas remains relatively steady in November 2019, rated as the same or slightly lower than five months ago.

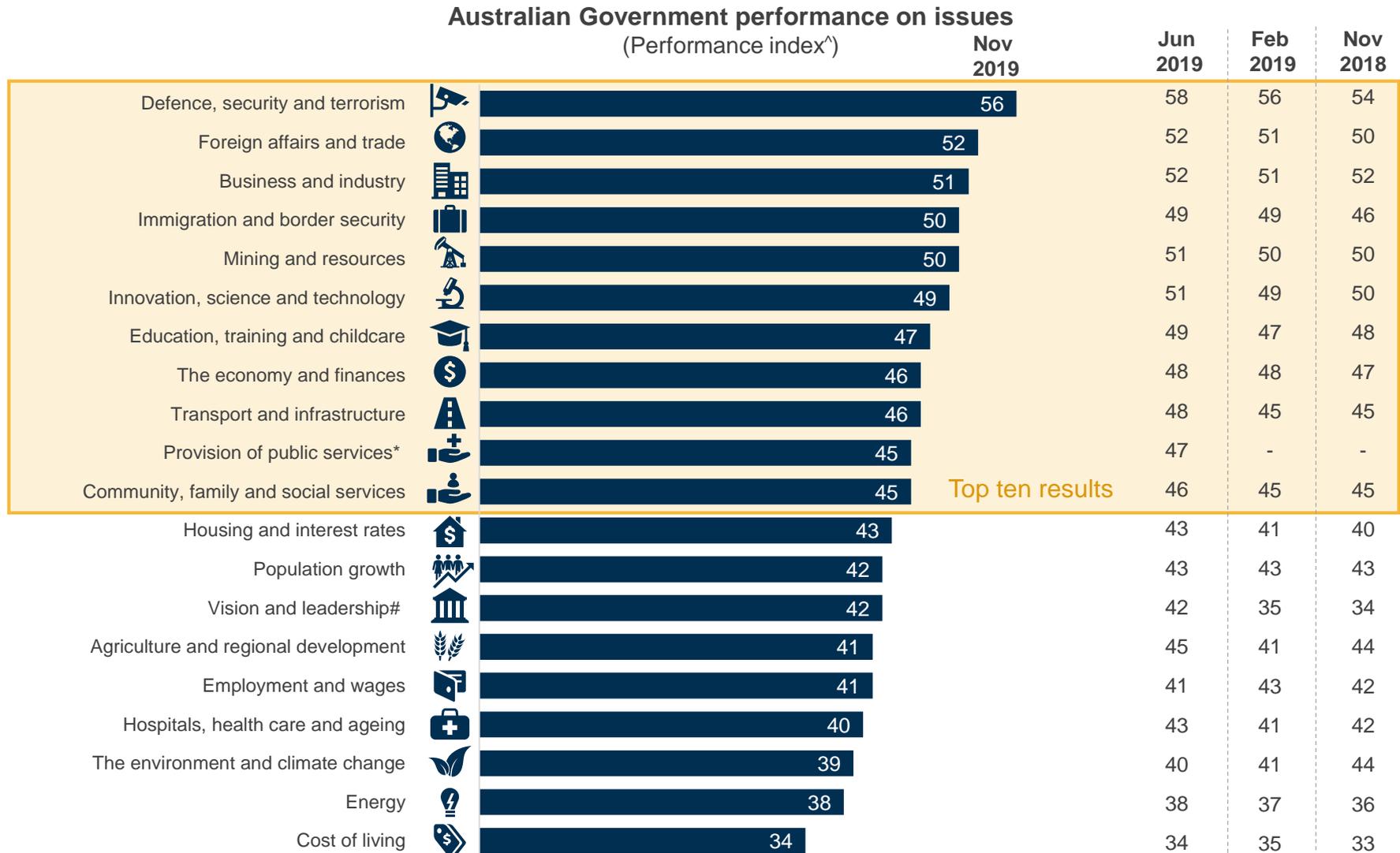
The largest differences are on agriculture and regional development (down four index points to 41, back to its February 2019 result), and on hospitals, healthcare and ageing (index of 40 compared with 43 in June 2019). Note that both metropolitan and regional Australians rate Government performance as weaker on agriculture and regional development since June.

Defence, security and terrorism remains the Government's best performing area (index of 56). Amid speculation around shifting maintenance for the Collins class submarines from SA to WA, performance on defence is rated strongest in WA (62) and weakest in SA (50). The Government also continues to perform reasonably well on foreign affairs and trade (index of 52), business and industry (51), immigration and border security (50) and mining and resources (50).

However, areas such as cost of living (index of 34), energy (38), the environment and climate change (39), and employment and wages (41) continue to attract poorer ratings, keeping them prominent in Australians' minds as important areas requiring more Government attention.



Government performs strongest on defence but declines on agriculture and healthcare and ageing



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

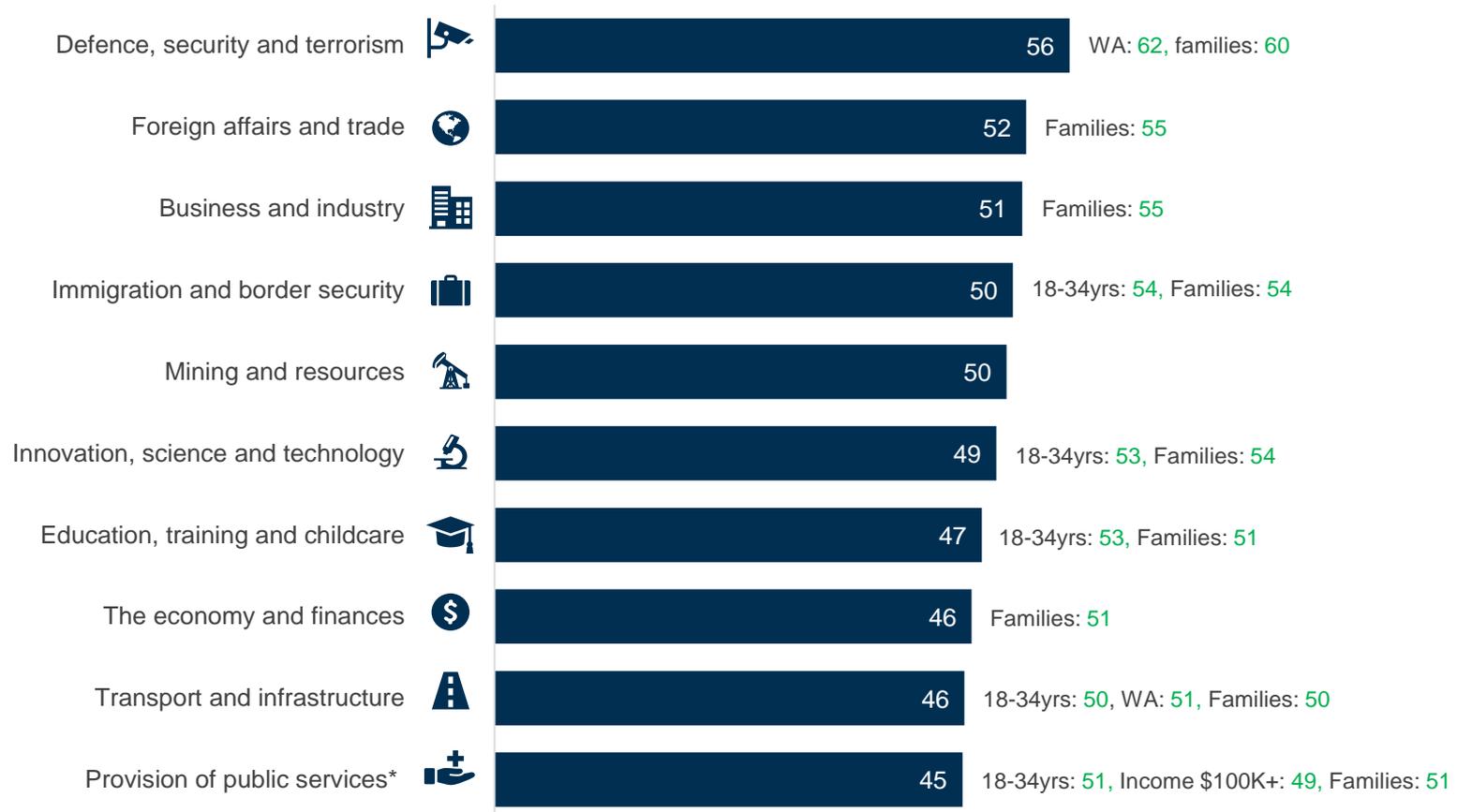
[^] For an explanation of how index scores are calculated refer to the survey methodology section of this report.

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

Amid optimism around Collins sub maintenance shift, WA rates Government performance higher on defence



Top ten ranked issues for Australian Government performance (Performance index[^])



* 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?**

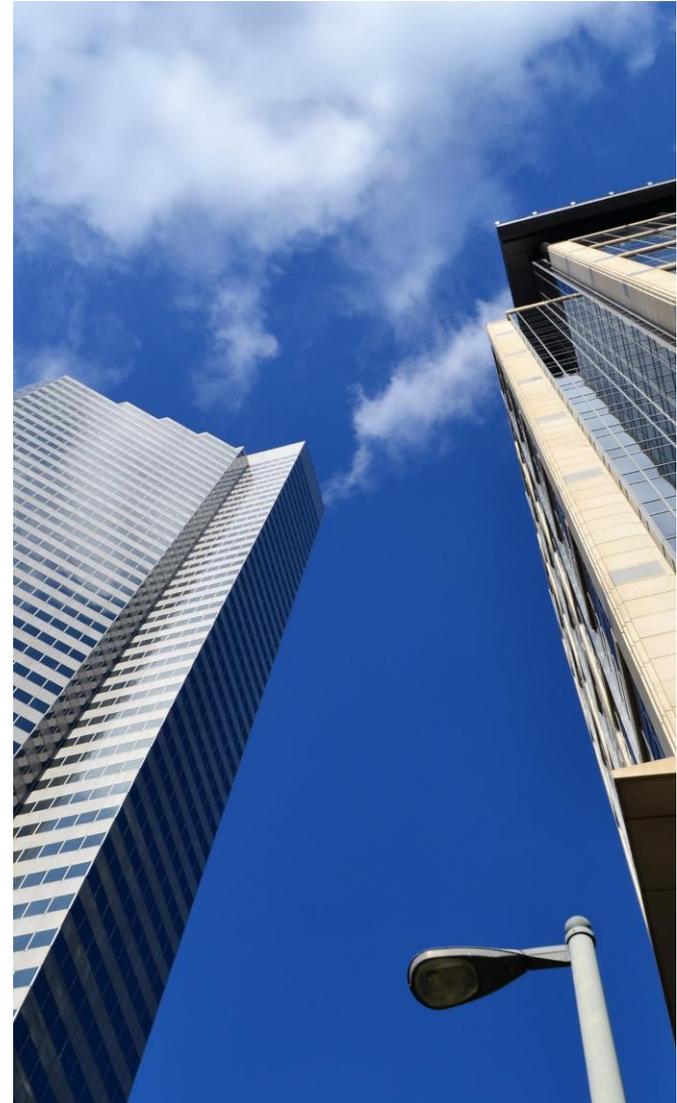
Australians see business and government performing less strongly than mid 2019



After a post-election lift in June, Australians are now feeling less positive about the performance of business and government. Six months in, the Australian Government's performance is rated at an index score of 45. This represents a fall from its post-election peak of 49 but is slightly better than the Morrison Government's earlier ratings of 43 (and equal to the Turnbull Government's best score in April 2018).

One in three Australians rates the Government's current performance as 'very poor' or 'poor' (33%, compared with 29% in June), and a similar proportion (34%) rate it as 'average'. Only 30% rate Government performance as 'very good' or 'good' (compared with 32% in June). While these shifts are within sampling error (i.e. not a statistically significant change), it does suggest the post-election positivity has faded among voters. The decline in sentiment has been across the board but appears most pronounced among women and older adults (55+ years).

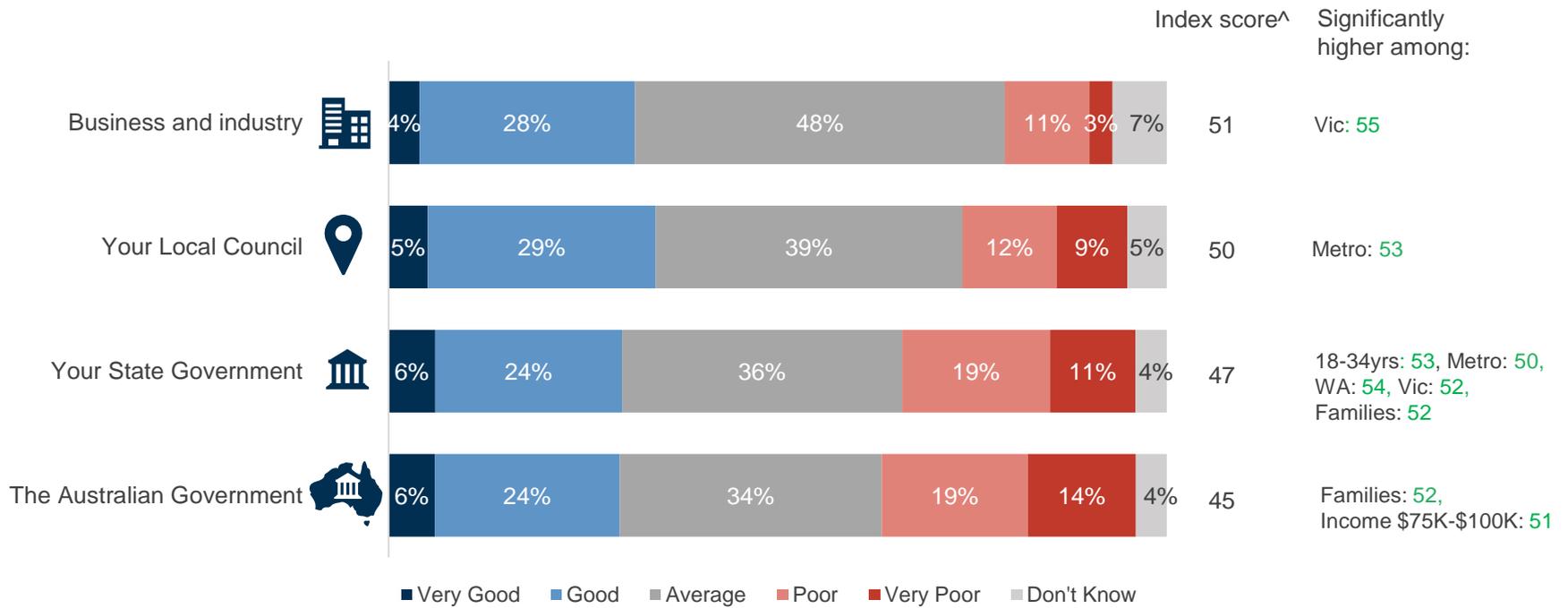
Business and industry performance (index of 51) continues to be rated more favourably than government, and higher than average in Victoria. However, fewer see it as performing well (32% down from 38%) compared to June and more see business and industry as performing poorly (14% up from 11%). Local Councils (index of 50) also continue to attract higher performance ratings than both State / Territory (47) and Federal Governments (45). At state level, Western Australians and Victorians continue to be most positive about their State Government (indices of 54 and 52, significantly higher than the national average).



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.

[^] For an in-depth explanation of how index scores are calculated refer to the research methodology section of this report.

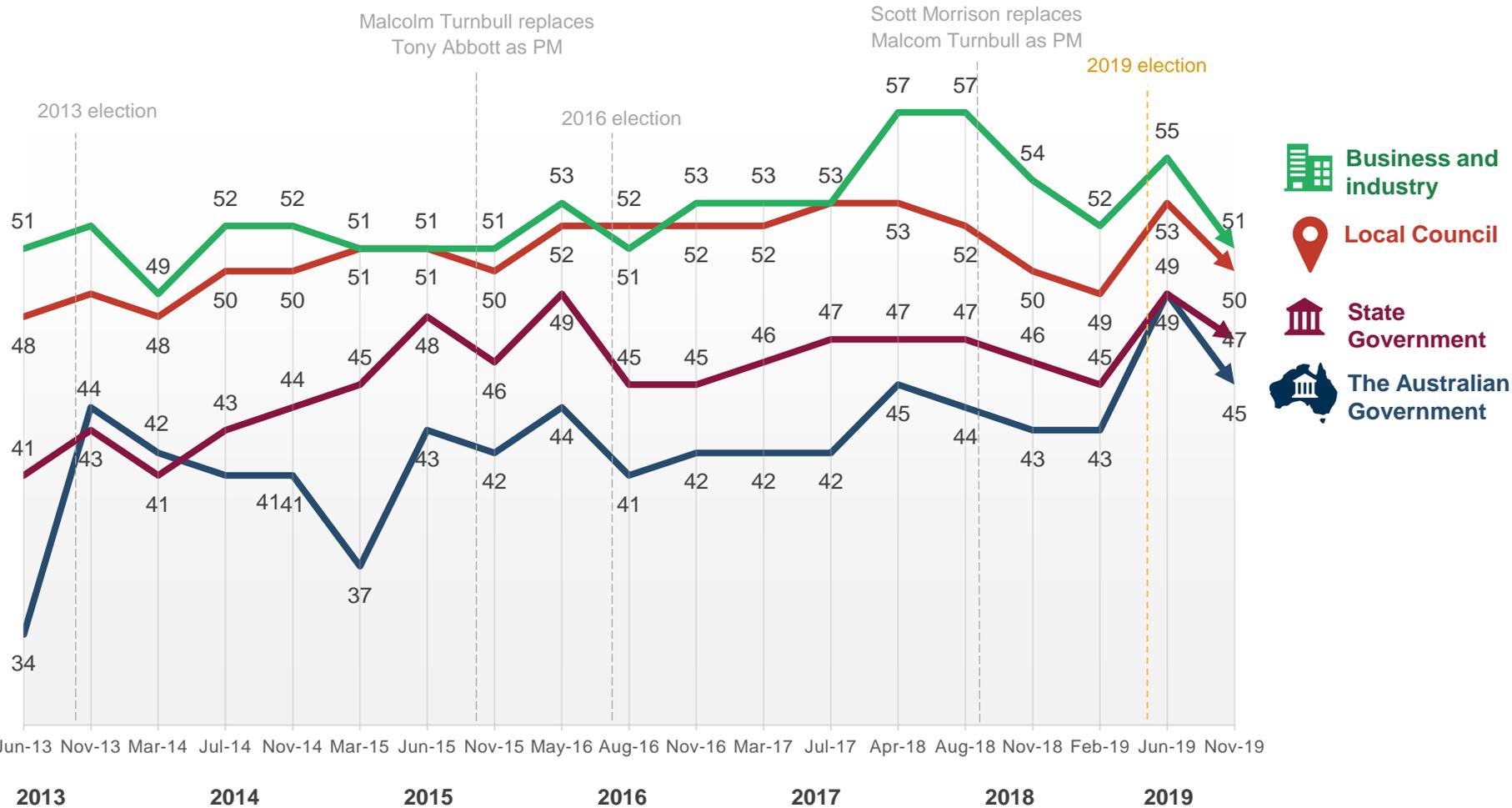
Q. How would you rate the current performance of each of the following organisations or groups in Australia?

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

Performance ratings decline after post-election boost, but Morrison Government still equal to Turnbull's best



Performance of organisations and groups in Australia
Index score trend[^]



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

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