True Issues is a research tool designed to assist Australian organisations understand where their issues truly sit within the contemporary issues landscape.

The economy, health, education; certainly all important top of mind issues to Australians, but where does that leave the many other issues and what is it that truly focuses attention on these matters?

True Issues is a unique offering. Run three times a year, True Issues not only tracks and prioritises issues facing Australians, but delves deeper to truly identify what is driving the prioritisation of issues.

For further enquiries or to include your issue in the next wave, please contact Jessica Lai, Research Director at jlai@jwsrsearch.com or on 0448 117 229.

To download this True Issues #12 report please go to: www.jwsresearch.com/#issues
True Issues Wave 12 (W12): in field 15-23 March, 2017

Comprised of a representative sample of 1,228 Australians aged 18+

Conducted as an online survey with sample drawn from the Cint’s OpinionHUB panel marketplace platform (www.cint.com)+

Margin of error is +/-2.8% at the 95% confidence level for results near 50%


Conducted in compliance with AS-ISO 20252
STATE OF PLAY
As the Turnbull Government prepares to deliver its 2017-18 Federal Budget, this first JWS Research True Issues poll for 2017 finds Australians in a generally positive mood regarding the country and their own position, similar to the last wave in November 2016. Australians believe themselves and the country to be in a strong position currently, at the community, state and national level, and that governments and business and industry are performing well.

However, while not yet statistically significant declines, confidence in the future direction of both the national economy, and business and industry, is slightly lower than four months ago. Older Australians (aged 55 and over) are a key contributor to the decline in the view that our national economy is heading in the right direction, while the drop in confidence in business and industry is largest among NSW residents.

Across these overall measures, younger Australians (aged 18-34 years) maintain a significantly more positive outlook on our national economic health and the future of the national economy, as well as a more favourable view of Federal Government performance. One in three 18-34s believe the Federal Government is currently doing a good job.
HEALTH, ECONOMY AND EDUCATION REMAIN MOST IMPORTANT BUT GOVERNMENT HAS LOST GROUND ON EDUCATION PERFORMANCE

- Hospitals and Healthcare (mentioned by 80% of Australians), Economy and Finances (59%) and Education and Training (56%) continue to be the most important issues Australians think government and business should be focusing on. However, Federal Government performance in these areas continues to be rated as average to poor by a majority of Australians, and perceptions of government performance on Education and Training have worsened slightly since November (20% rated as ‘very good/good’, down from 24%).

- Early in this new school year, key areas such as literacy and numeracy levels, and schoolyard and online bullying, are of increased concern to Australians, with the biggest declines in federal government performance ratings occurring amongst women and residents of NSW and WA.

- Hospital and Healthcare priorities continue to be dominated by cost and access to services, e.g. Medicare and bulkbilling, system funding, bed availability, medicine costs, surgery waitlists, and private health insurance. Australians also continue to want a focus on mental health issues.

- Concerns about cost of living have increased slightly over the summer months and it remains the dominant financial concern for Australians, particularly among those in the younger (18-34 years) and middle age groups (35-54 years). Housing affordability and wages and employment also remain key areas that Australians want addressed by business and government but slightly fewer are concerned about multinational tax evasion, compared with November 2016.
While Defence, Security and Terrorism remains important to over four in ten Australians, it has declined significantly since August 2016 as a key concern (from 49% to 42%). It now sits slightly below Infrastructure and Population (45%), Community and Social Issues (44%), and Immigration and Border Security (43%), and equal to Quality of Government (42%), as the most important area business and government should be focusing on. This could be indicative of a decline in its importance to Australians, relative to other key policy areas, or a perception that this area is less in need of more government attention than it currently receives.

However, alongside Immigration and Border Security, the area of Defence, Security and Terrorism continues to be the highest performing for the Federal Government (35% and 37% respectively, rate it as doing a ‘very good’ or ‘good’ job).

Since the August 2016 True Issues, more Australians have become concerned about Infrastructure and Population issues (45% nominate this area as important, up from 40%). Roads and congestion, housing availability, and energy reliability and security are viewed as the key issues the Federal Government should be addressing in this area, and an increased number of Australians are concerned about population growth, compared with four months ago.

Quality of Government has also become increasingly important to Australians since August 2016, in particular, the issue of politicians’ salaries and benefits which has increased by five percentage points since November. (This was a key concern for 26% of the 42% of Australians who rated Quality of Government as one of their top priorities, but the leading concern in this area remains wasting taxpayer’s money, at 47%).
ECONOMIC HEALTH, FUTURE DIRECTION AND OVERALL PERFORMANCE
AUSTRALIANS CONTINUE TO SEE STRENGTH IN NATIONAL AND STATE ECONOMIES AND BUSINESS AND INDUSTRY

Perceived strength of local communities continues to rise steadily, to one in four Australians.

Spotlight on: National Economic Health – W12 March 2015

Q6. Thinking about the economic health of each of the following, how would you rate the economic health of each on a scale from 1 to 5?

Base: All respondents, W12 n=1,228
AFTER A RISE POST 2016 ELECTION, CONFIDENCE IN DIRECTION OF NATIONAL ECONOMY AND BUSINESS AND INDUSTRY HAS SOFTENED

**Future Direction**

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- **% Right direction**
  - Personal situation: 33%
  - Local community: 28%
  - Business and industry: 20%
  - State economy: 16%
  - National economy: 16%

**Spotlight on: National Economic Outlook – W12 March 2015**

- **Right direction** significantly higher amongst: 18-34 y/o (22%)
- **Wrong direction** significantly higher amongst: 55+ y/o (46%)

Q7. Thinking about the future, do you think each of the following is headed in the right or the wrong direction?
Base: All respondents, W12 n=1,228
Q5. How would you rate the current overall performance of each of the following organisations in Australia, using a scale from 1 to 5?
Base: All respondents, W12 n=1,228

Very Good: 5%
Good: 16%
Average: 34%
Poor: 24%
Very Poor: 17%
Don't Know: 3%

Significantly Higher amongst (total good):
- Male (25%)
- 18-34 y/o (33%)
- NSW/ACT (27%)
- HH income $75-$100K (33%)
ISSUE IMPORTANCE AND PERFORMANCE
**DEFENCE, SECURITY AND TERRORISM DECLINES AS A PRIORITY BUT INFRASTRUCTURE AND POPULATION CONCERNS ARE ON THE RISE**

**Issue Area Importance – top tier**
Over the course of the current Federal Government

<table>
<thead>
<tr>
<th>Issue Area Importance</th>
<th>% Top Five Issues</th>
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<tr>
<td>Health and hospitals</td>
<td>80</td>
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<tr>
<td>Economy and finances</td>
<td>59</td>
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<tr>
<td>Education and training</td>
<td>56</td>
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<tr>
<td>Infrastructure and population</td>
<td>45</td>
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<tr>
<td>Community and social issues</td>
<td>42</td>
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<tr>
<td>Defence, security and terrorism*</td>
<td>42</td>
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* Changed from ‘Defence and security’ at W10

Q1. From the following list, please select the 5 most important issues to you as something governments and business should be focusing on.

Note: Prior to W5, Q4 was asked in relation to “governments in Australia”.

Base: All respondents, W12 n=1,228
COMMUNITY CONCERN ABOUT QUALITY OF GOVERNMENT HAS INCREASED OVER THE LAST SIX MONTHS

Issue Area Importance – lower tier
Over the course of the current Federal Government

Q1. From the following list, please select the 5 most important issues to you as something governments and business should be focusing on.
Note: Prior to W5, Q4 was asked in relation to “governments in Australia”.
Base: All respondents, W12 n=1,228
Q4. Overall and in general, how would you rate the current performance of the federal government in Australia on each of the following issues?

Note: Prior to W5, Q4 was asked in relation to “governments in Australia”.

Base: All respondents, W12 n=1,228
Q4. Overall and in general, how would you rate the current performance of the federal government in Australia on the each of the following issues?

Note: Prior to W5, Q4 was asked in relation to “governments in Australia”.

Base: All respondents, W12 n=1,228
Q1. From the following list, please select the 5 most important issues to you as something governments and business should be focusing on.

Q4. Overall and in general, how would you rate the current performance of the federal government in Australia on the each of the following issues?

Note: Prior to W5, Q4 was asked in relation to “governments in Australia”.

Base: All respondents, W12 n=1,228
GOVERNMENT IMPORTANCE VS PERFORMANCE — TRUE ISSUES 12

- Hospitals and health care
- Education and training
- The economy and finances
- Community and social issues
- The quality of government
- Infrastructure and population
- The environment
- Defence, security and terrorism
- Immigration and border security
- Business, mining and industry
- Regional and rural Australia

Performance (% Very good + % Good)
IMPORTANCE OF INDIVIDUAL SUB-ISSUES
HOSPITALS AND HEALTHCARE ISSUES

Q2. Please select up to three issues or concerns relating to hospitals and healthcare that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Hospitals and healthcare in top five, W12 n=979

- Funding to the health system: 34%
- Medicare and bulk-billing: 33%
- Availability of beds: 31%
- Private Health Insurance: 25%
- Mental health issues: 22%
- Cost of medicines: 21%
- Elective surgery waiting lists: 21%
- Regional access: 18%
- Funding for research: 16%
- National Dental Health Funding: 15%
- PBS funding: 15%
- Number of medical professionals: 14%
- Indigenous health: 9%
- National disability insurance scheme: 6%
- Private Health Insurance: 6%

Government Performance on Hospitals and Healthcare

- Very Good: 5%
- Good: 14%
- Average: 34%
- Poor: 25%
- Very Poor: 19%
- Don’t know: 3%

80%

Hospitals and healthcare

- Rated in top five most important
- Total good performance = very good + good

Very Good

Good

Average

Poor

Very Poor

Don’t know
**Economy and Finance Issues**

- **47%**
  - Cost of living

**Government Performance on the Economy and Finances**

- Very good: 3%
- Good: 15%
- Average: 36%
- Poor: 25%
- Very poor: 16%
- Don't know: 4%

- **The economy and finances**
  - Rated in top five most important
  - Total good performance = very good + good

*New to Wave 12*

Q2. Please select up to three issues or concerns relating to the economy and finances that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Economy and finances in top five, W12 n=729
Q2. Please select up to three issues or concerns relating to education and training that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Education and training in top five, W12 n=695
Q2. Please select up to three issues or concerns relating to defence, security and terrorism that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Defence and security in top five, W12 n=505
Q2. Please select up to three issues or concerns relating to community and social issues that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Community and social issues in top five, W12 n=544
**INFRASTRUCTURE AND POPULATION ISSUES**

Q2. Please select up to three issues or concerns relating to infrastructure and population that are most important to you that you think federal government should be addressing or focusing on specifically.

*New to Wave 12*

Base: Infrastructure and population in top five, W12 n=546
Q2. Please select up to three issues or concerns relating to immigration and border security that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Immigration and border security in top five, W12 n=523

Immigration and border security
- Rated in top five most important
- Total good performance = very good + good

Government Performance on Immigration and Border Security

- Refugees and asylum seekers: 64%
- Immigration numbers: 59%
- People smuggling: 42%
- Domestic border security at ports and airports: 40%
- Children in detention: 34%
- Detention of asylum seekers: 19%
- Very good: 9%
- Good: 26%
- Average: 30%
- Poor: 15%
- Very poor: 15%
- Don't know: 4%

Up 5 points since November
Down 9 points since November
Up 8 points since November
Down 7 points since November
457/employment visas

Children in detention Down 9 points since November
Up 8 points since November
Down 9 points since November
Up 5 points since November
Down 7 points since November
457/employment visas

Children in detention
Down 9 points since November
Up 8 points since November
Down 9 points since November
Up 5 points since November
Down 7 points since November
457/employment visas
Q2. Please select up to three issues or concerns relating to the environment that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Environment and climate change in top five, W12 n=494
Q2. Please select up to three issues or concerns relating to quality of government that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Quality of government in top five, W12 n=514
Q2. Please select up to three issues or concerns relating to regional and rural Australia that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Regional and rural Australia in top five, W12 n=374
Q2. Please select up to three issues or concerns relating to business, mining and industry that are most important to you that you think federal government should be addressing or focusing on specifically.

Base: Business, mining and industry in top five, W12 n=231
THERE ARE OVER 24 MILLION PEOPLE IN AUSTRALIA...

FIND OUT WHAT THEY'RE THINKING.