



**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 26 – 30 June 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%	-	-
<b>Index score</b>			<b>43</b>

A photograph of a person's legs and hands using a silver metal walker. The person is wearing blue pants and a blue apron with white ties. The scene is set on a wooden floor. The image is partially obscured by a large white diagonal shape that frames the text on the left.

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



# Post-election, healthcare and ageing still most top of mind, ahead of the environment, economy and wages



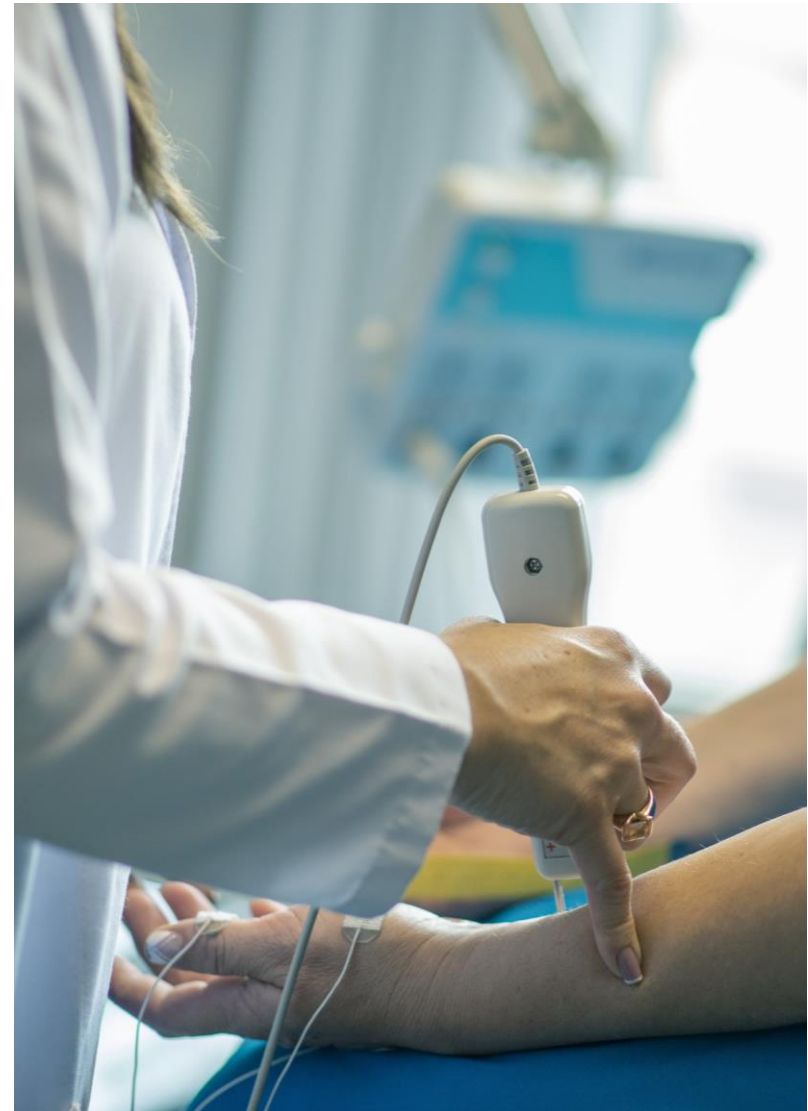
When asked to name up to three issues that personally interest or concern them the most, and that the Australian Government should focus on, 29% of Australians describe issues related to hospitals, healthcare and ageing. This was also the leading concern in February, following media coverage of the Royal Commission into Aged Care. Four months later, Australians continue to be concerned about caring for an ageing population, as well as rising healthcare costs and ease of access to good quality care.

The environment and climate change (22%), economy and finances (21%), and employment and wages (21%) are the next most important issues on Australians' minds currently.

The environment and climate change was a key issue for voters going into the 2019 election, and some express frustration at a lack of Government action in this area, seen as being out of step with efforts at a community level.

Government focus on managing the economy is seen as critical due to its wide-reaching impact on the lives of everyday Australians, and issues such as underemployment, casualisation of work, lack of protections for workers, and stagnant wage growth feed community anxiety about meeting living costs.

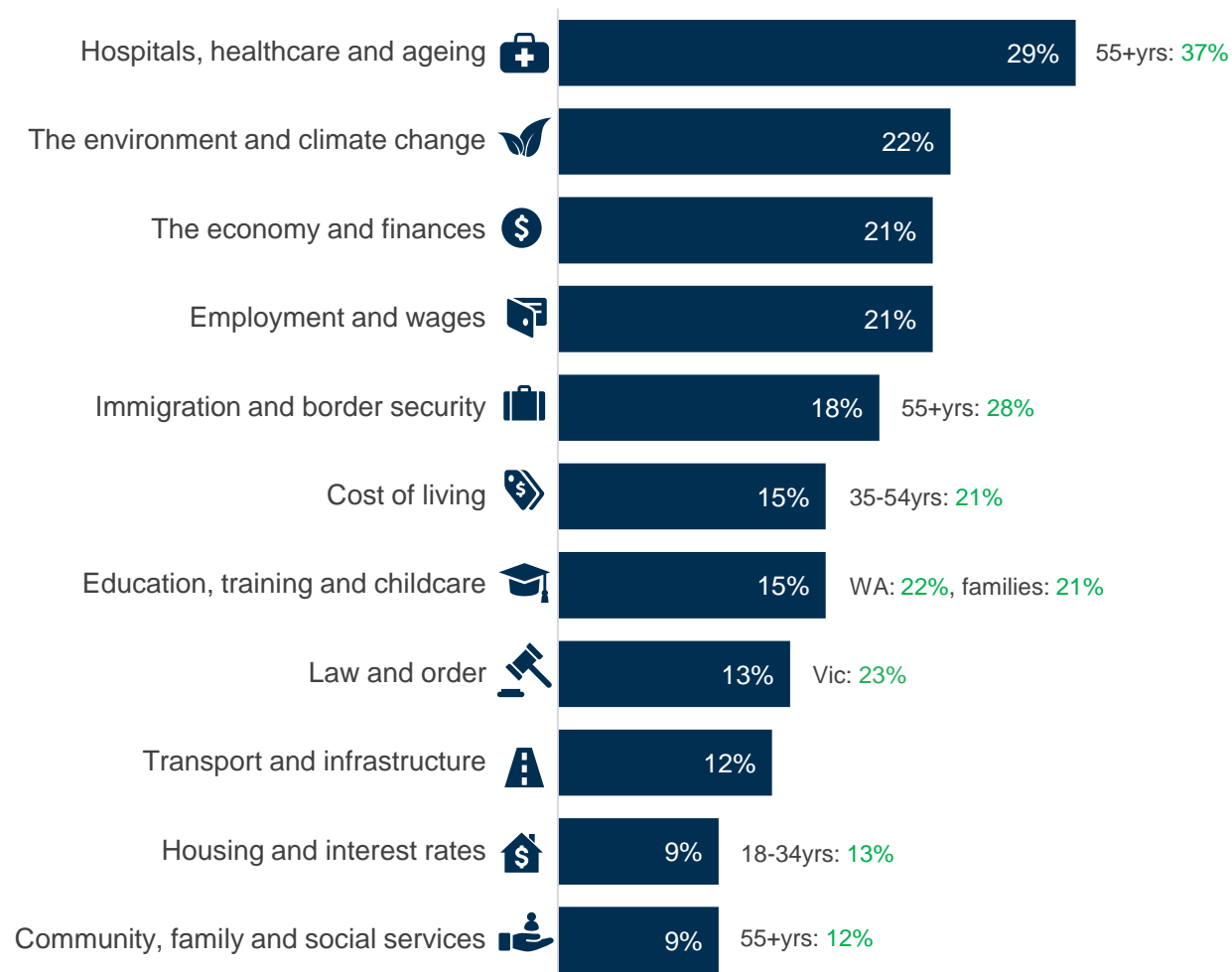
Immigration and border security is not as prominent a concern in June 2019, mentioned by 18%, down from 23% in February. This is an area perceived to have already received much attention and investment from Government.



# Healthcare, the environment, the economy and employment are Australians' 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 remains a key concern for Australians



As the Morrison Government eases into its next Parliamentary term, cost of living and hospitals, healthcare and ageing remain Australians' top prompted priorities for Government attention, with living costs (61%) edging back ahead of health and ageing (57%) in June 2019. Employment and wages (42%), the economy and finances (34%), and the environment and climate change (33%) continue to round out the top five.

Lesser priorities compared with four months ago include immigration and border security (down six points to 30% and dropping from 4<sup>th</sup> to 7<sup>th</sup> most important), energy (down four points to 27%) and vision, leadership and quality of government (down four points to 14%).

Generation X (35-54 years) continue to feel under the most pressure from living costs (69%) as they manage mortgages and the cost of raising families. While this is also the leading issue among millennials (18-34 years), it is noteworthy that a majority of these younger adults are concerned about employment and wages (51%) and despite interest rates continuing to fall, housing and interest rates remains their 4<sup>th</sup> leading concern (38%).

Older adults aged 55+ (68%) and women (64%), who tend to shoulder carer responsibilities within families, are most likely to rate hospitals, healthcare and ageing as an important area for the Government to focus on.

# Cost of living re-emerges as top issue for Australians, while fewer concerned about border security and energy



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



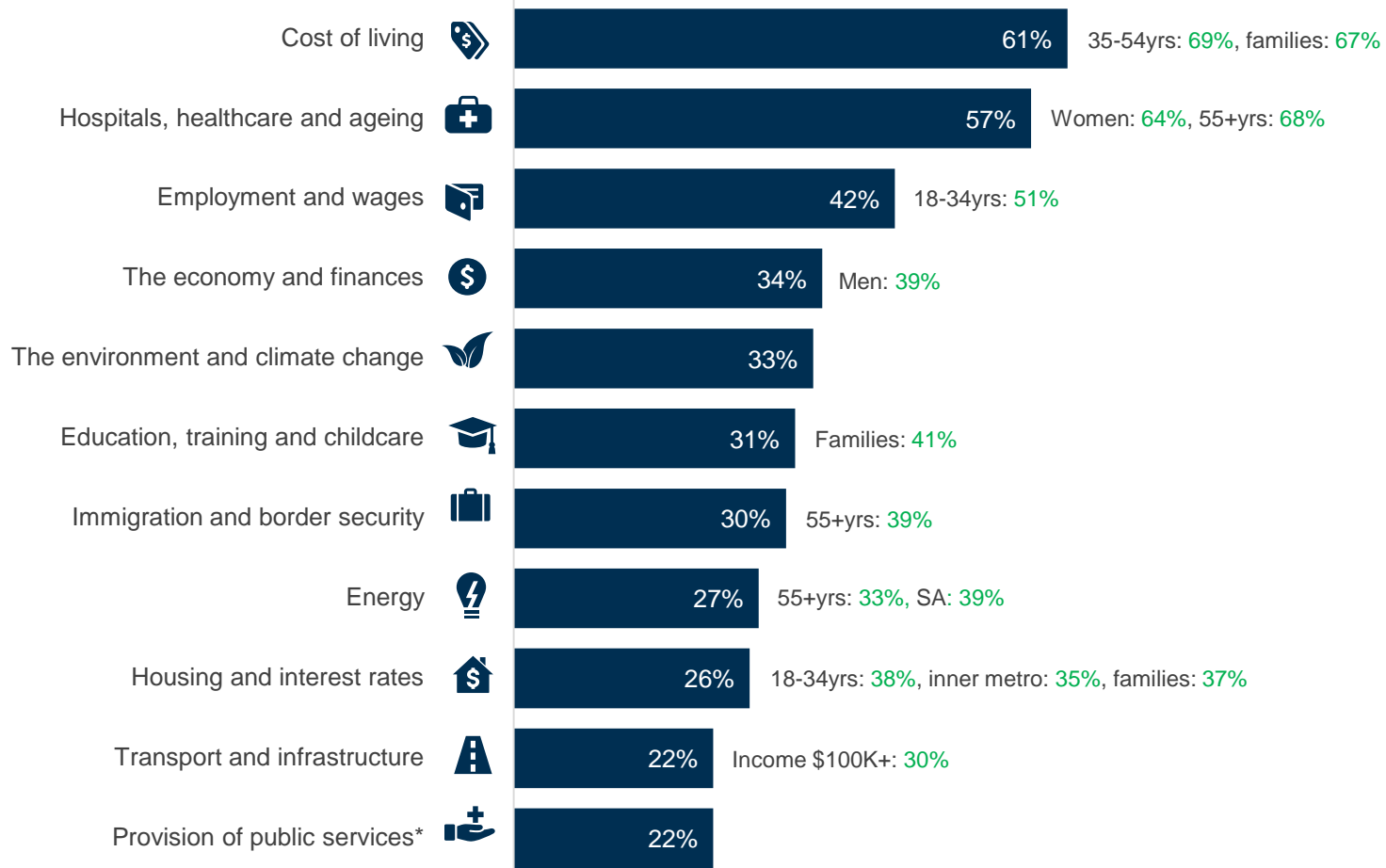
\* Added in June 2019

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, millennials (18-34 yrs) concerned about jobs and wages



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



\* Added in June 2019

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).

# How does the Australian Government perform on top issues?





# Government performance is stable across key areas and stronger on vision, leadership, quality of government



Coming out of its recent election win, Government performance across key areas remains steady at the end of June 2019, rated as the same or slightly better than four months ago – although significantly improved on vision, leadership and quality of government (up 7 points to a performance index score of 42).

Defence, security and terrorism remains the Government's best performing area (58) and it also continues to perform reasonably well on business and industry (52), foreign affairs and trade (52), mining and resources (51), and innovation, science and technology (51).

Australians believe Government has invested much in national and border security and, as a result, feel safe and that our borders are protected. Community perceptions of strong relationships with other nations and ease of access to their goods creates a sense that Government has been effective in foreign affairs and trade.

However, areas such as cost of living (index of 34), the environment and climate change (40), and employment and wages (41) continue to attract poorer ratings, keeping them prominent in Australian's minds as important areas requiring more Government attention.



# Government performs strongest on defence but receives post-election boost on vision, leadership, quality of govt



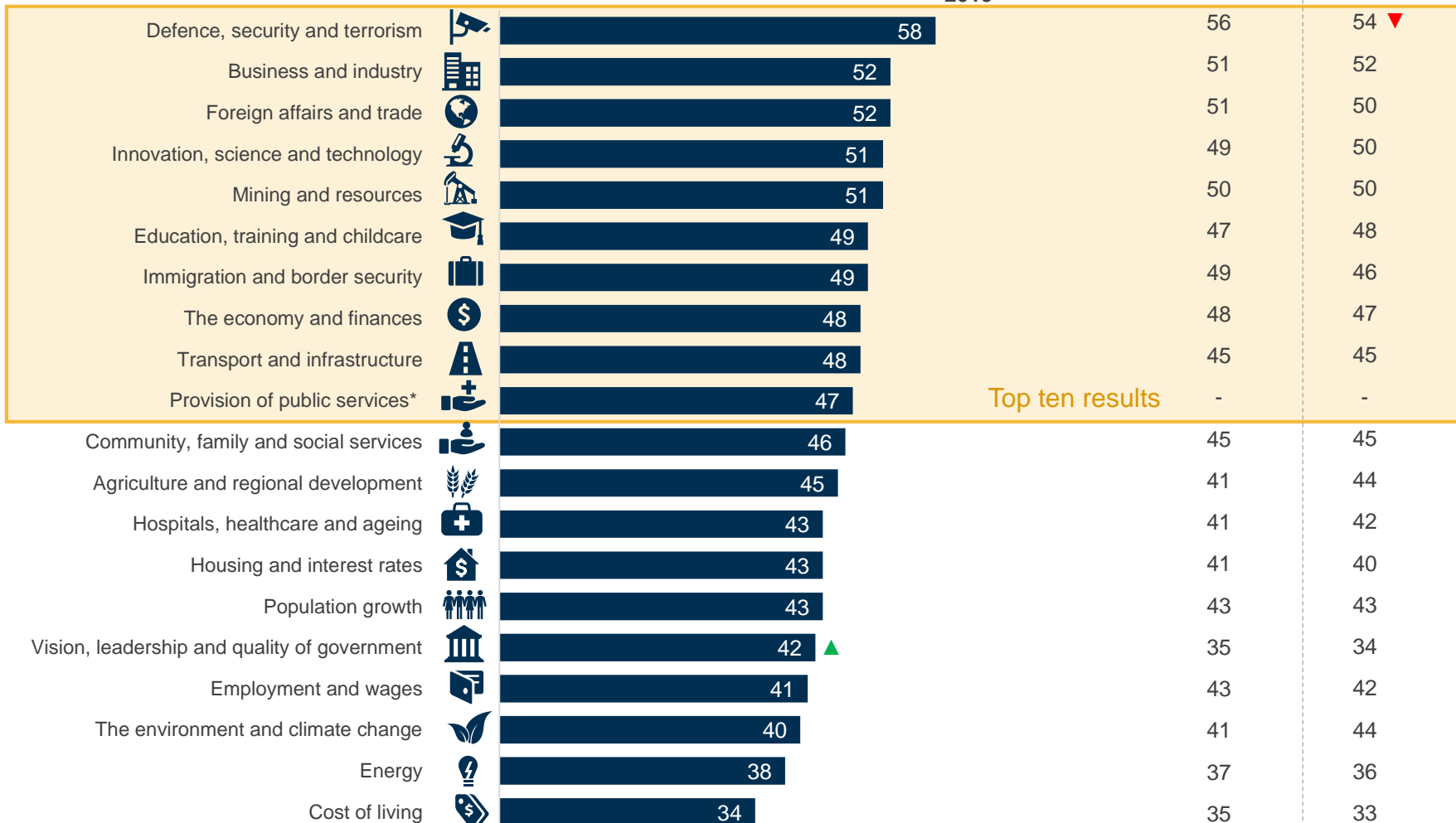
## Australian Government performance on issues

(Performance index#)

Jun  
2019

Feb  
2019

Nov  
2018



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

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

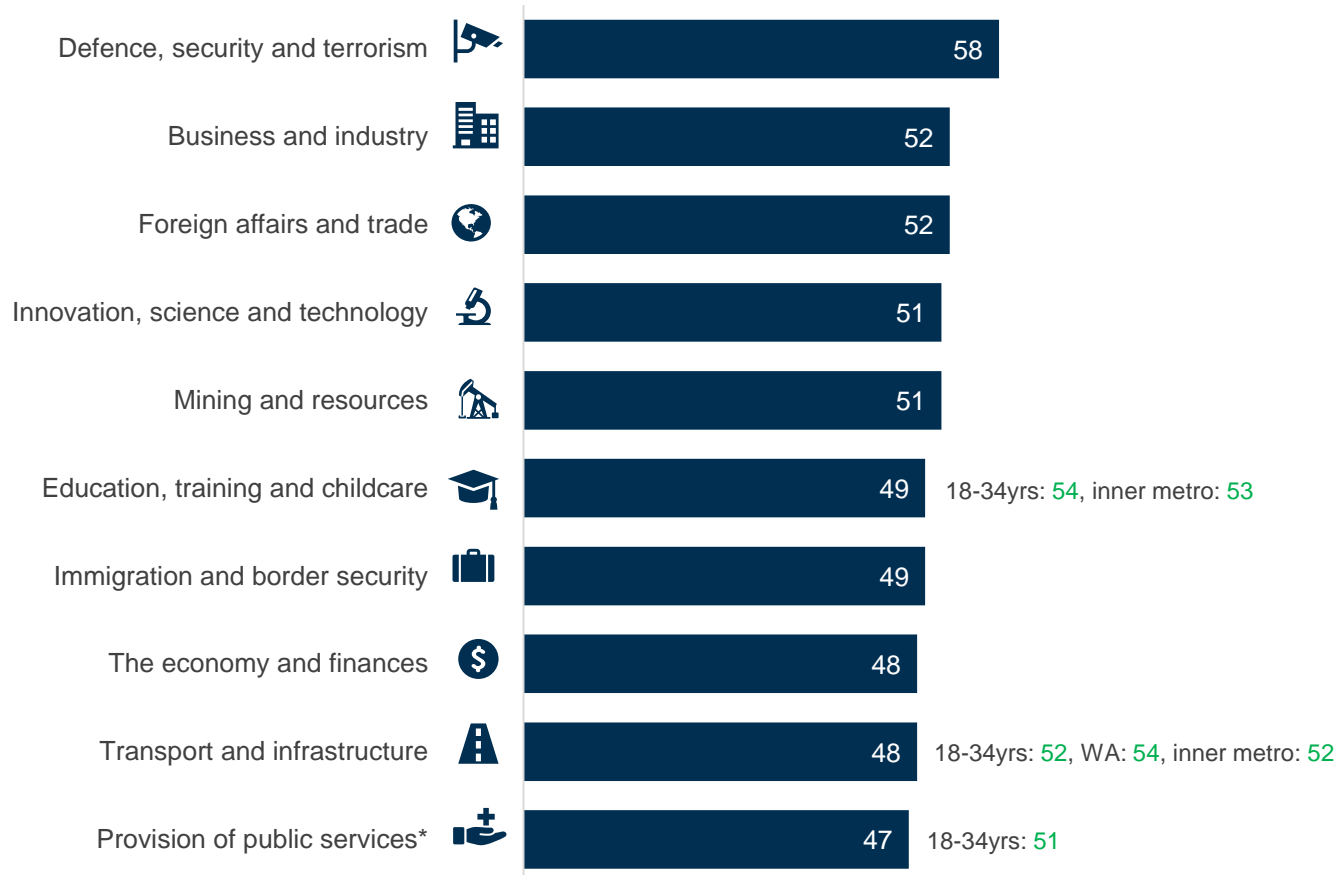
Q. How would you rate the performance of the Australian Government on each of the following issues?

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

# After \$1.6b Budget boost, WA rates Government performance higher on transport and infrastructure



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 more strongly than four months ago



Australians are feeling more positive about the performance of business and government than four months ago. They view conditions as more stable after the return of the incumbent Federal Government and perceived end to leadership changes and instability within the Coalition.

Following the release of its 2019-2020 Budget and recent election win, the Australian Government's performance is rated at an index score of 49. This represents both an increase since February (43) and the Coalition Government's highest index score since it took power in September 2013. Previously, its strongest result had been in April 2018 (index score of 45) under the leadership of Malcom Turnbull.

Almost one in three Australians rate the Government's current performance as 'very good' or 'good' (32% up from 23%). A similar number (29%) rate it as 'very poor' or 'poor', while the largest proportion of the electorate (37%) continue to give an 'average' rating. Improvement has been across the board, including among millennials, whose opinion had previously soured over November 2018 to February 2019.

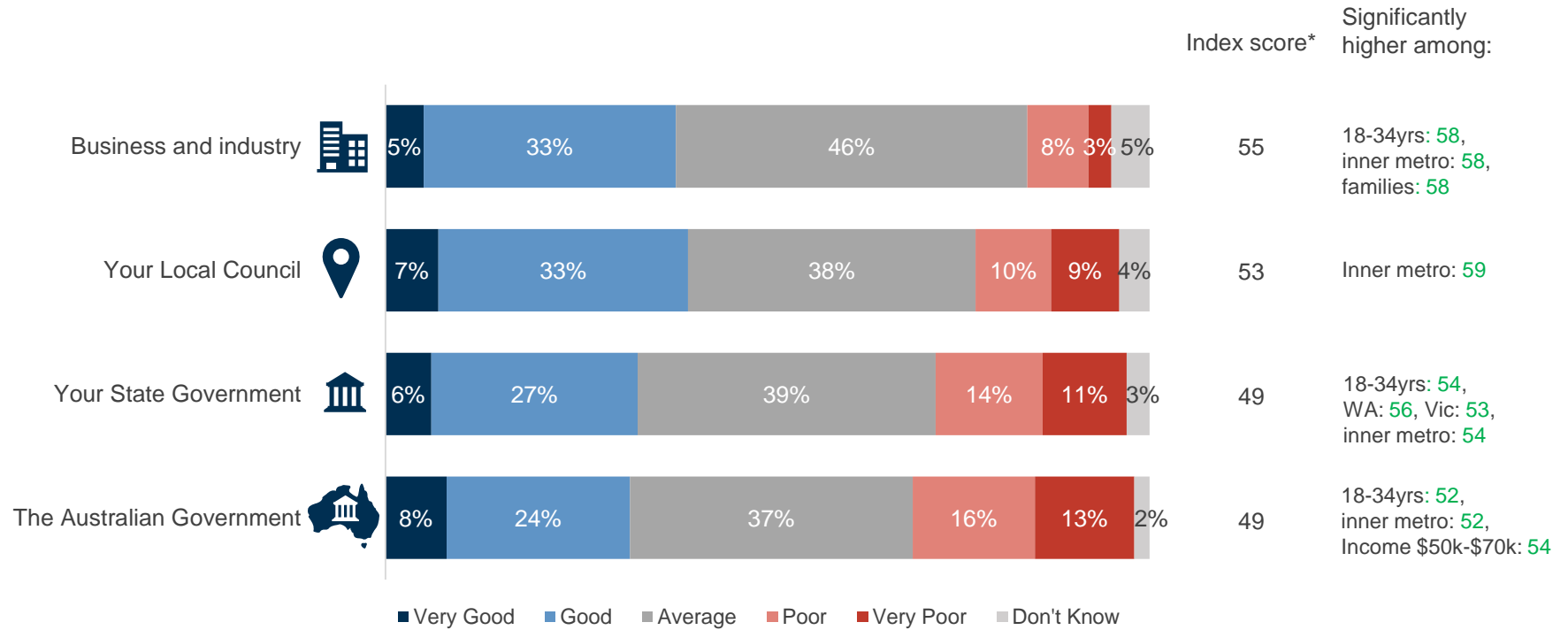
Business and industry performance (index of 55) continues to be rated more favourably than government, and higher than average among older adults. Local Councils (index of 53) also continue to attract higher performance ratings than both State / Territory and Federal Governments (49 each). At state level, Western Australians and Victorians are most positive about their State Government (indices of 56 and 53, significantly higher than the national average).



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



## Performance of organisations and groups in Australia



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

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

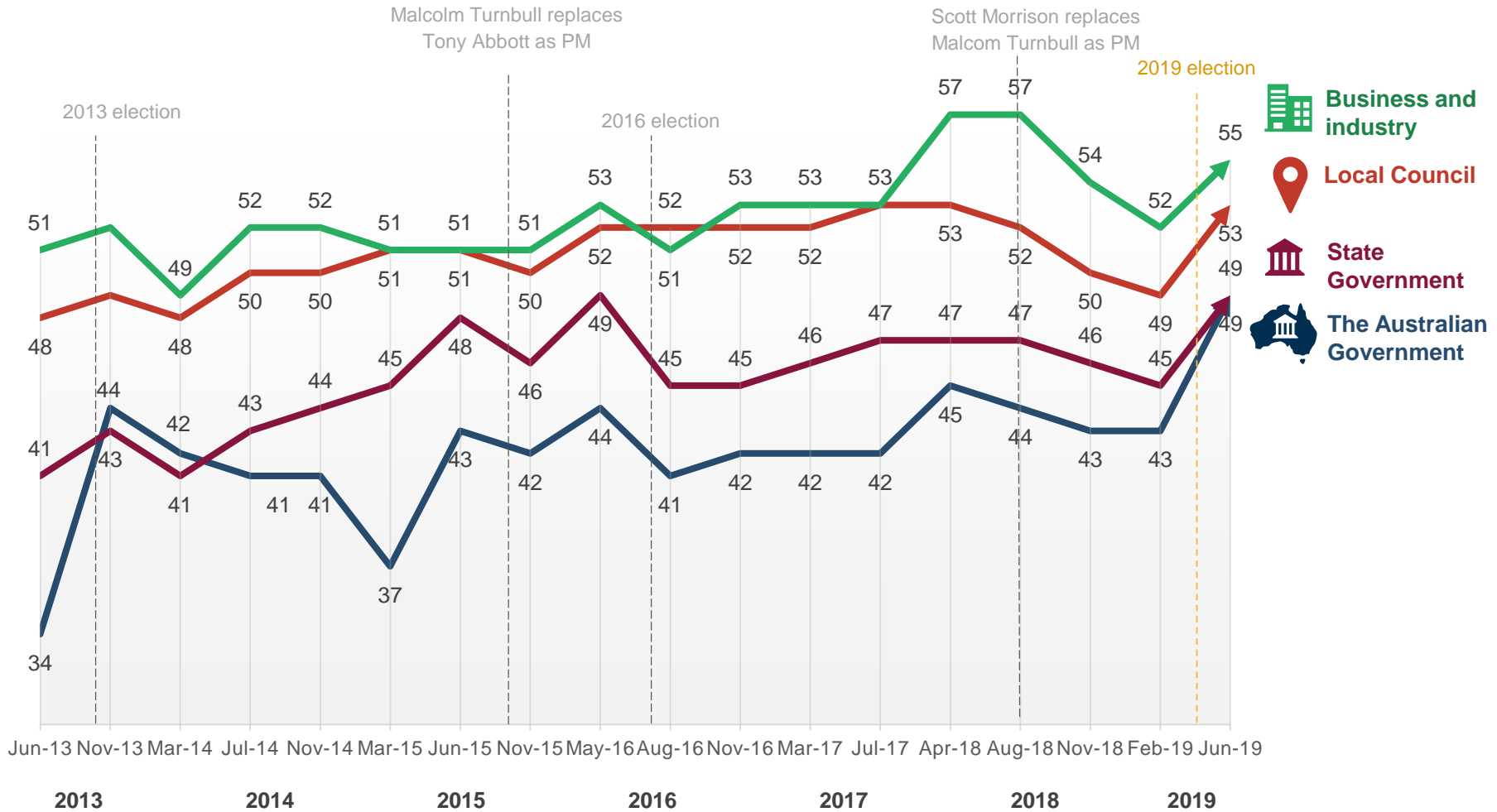
Base: All respondents (n=1,000).

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

# Post-election boost for business and government delivers peak performance rating for Federal Government



Performance of organisations and groups in Australia  
Index score trend\*



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

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





# Australians feel more optimistic about where the economy, business and their own personal situation is heading



Post-election, Australians continue to feel most optimistic about their own personal situation and local community, however there has been a slight upturn in sentiment around the direction business and national and state economies are heading.

Australians' overall optimism about their own personal situation remains high, with 35% feeling they are heading in the right direction, twice those who see themselves heading in the wrong direction (18%).

Confidence about their local community has rebounded since February, with significantly more feeling this is heading in the right direction (32% up from 27%), significantly fewer feeling neutral (39% down from 44%) and slightly fewer headed in the wrong direction (18% compared with 20%). This has produced a large upswing in net direction rating from +6 to +15, its highest result since tracking began in 2013.

Confidence in business and industry has bounced back into the positive since February, from a net direction rating of -1 to +4.

Perceived direction of the national economy has continued to improve. One in four (25%) see it as heading in the right direction, up from 21% in February. This is now only slightly fewer than those who see it heading in the wrong direction (29%).

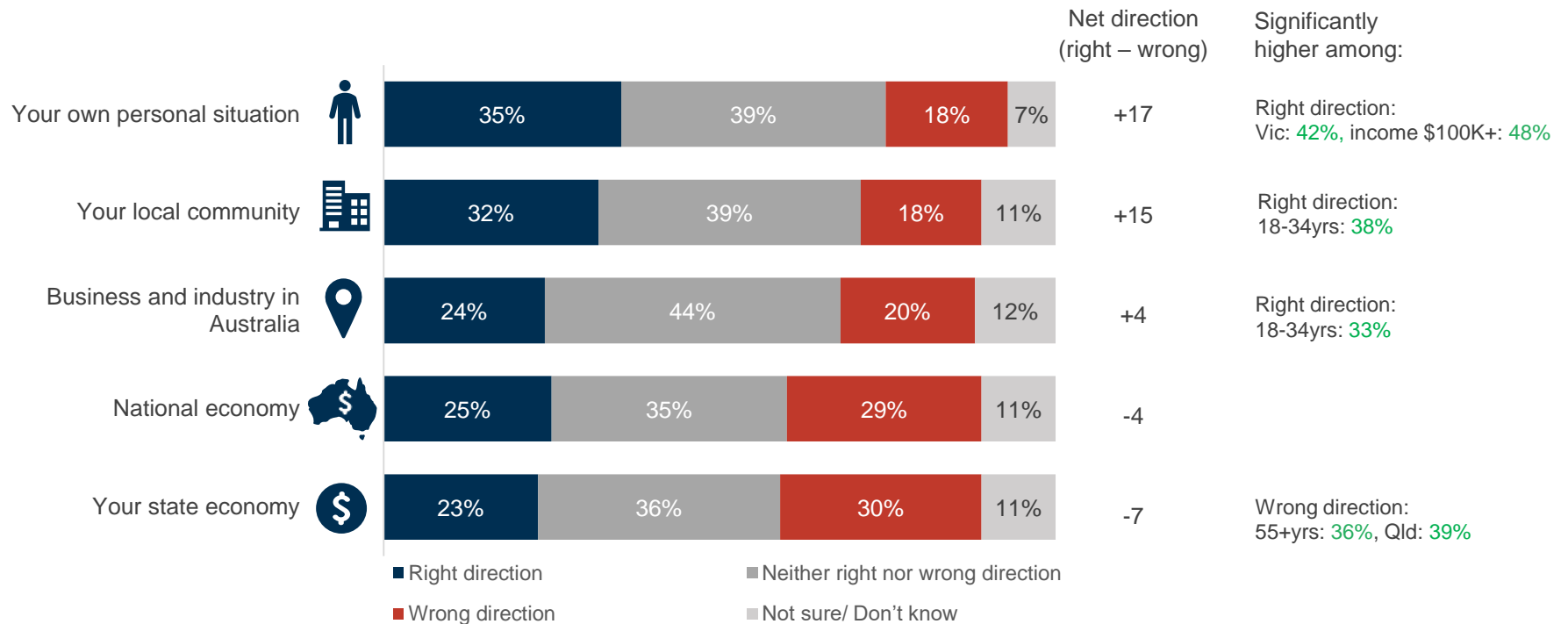
The net direction rating of the national economy continues to edge toward a positive (or at least neutral) position, having improved from -11 in November 2018 to -8 in February 2019 and now -4 at the end of June.

Similarly, the net direction of state and territory economies overall has improved slightly from -10 to -7, but opinion varies greatly by state. In both Queensland and South Australia, more than twice as many see their state economy heading in the wrong direction (39% and 40%, respectively) as heading in the right direction (16% and 21%, respectively).

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



## Direction of organisations and groups in Australia

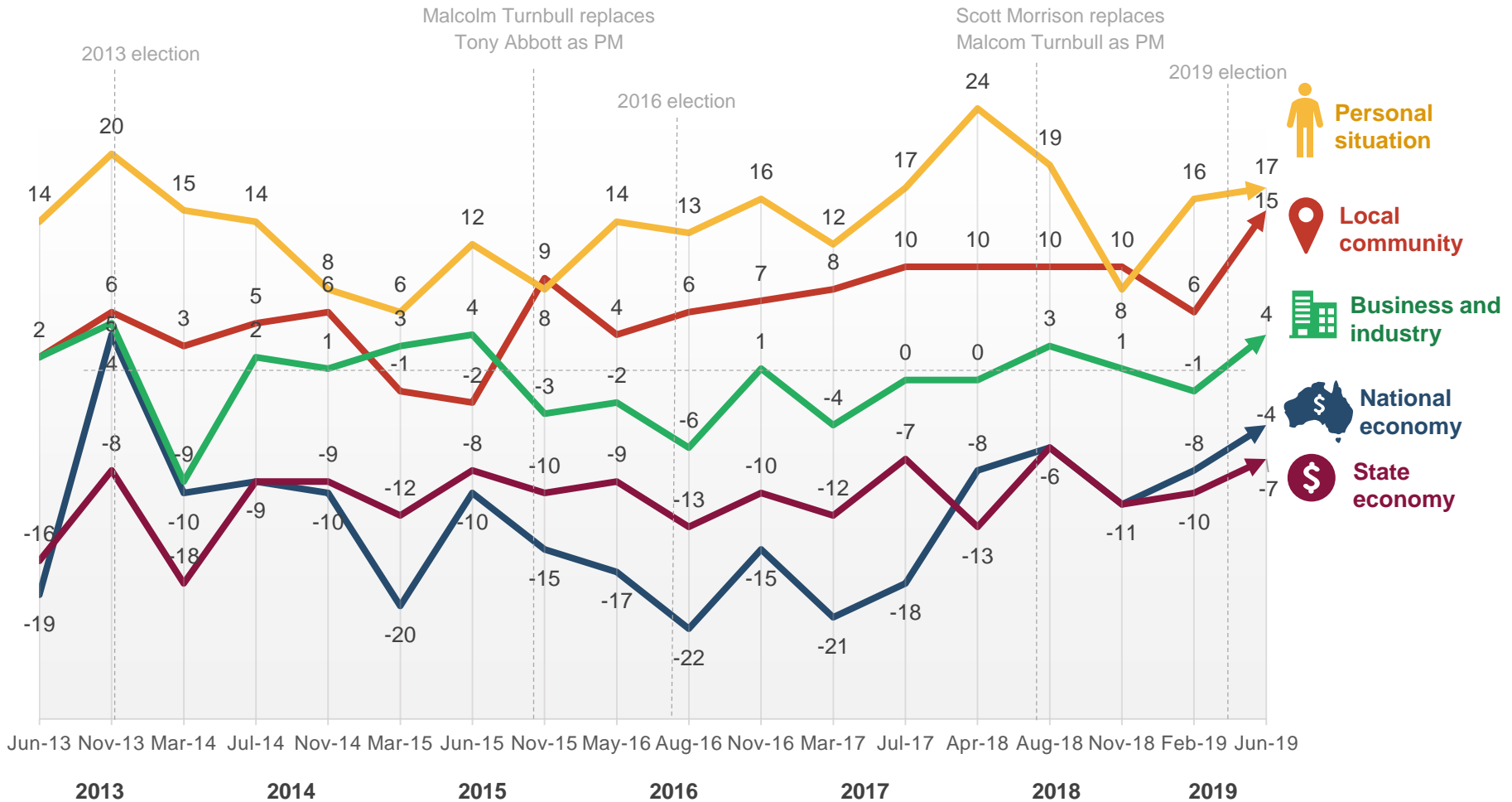


Significantly higher than the national total at the 95% confidence interval.  
 Q. Do you think each of the following is generally headed in the right or the wrong direction?  
 Base: All respondents (n=1,000).

# Post election, more Australians optimistic about business and the economy, and their own community and situation



**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).

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