DPC TRACKING RESEARCH 2023-24

Wave 3 Report

13 September, 2023

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GAME CHANGERS

Contents

Key themes that emerge

1. A quarter of Queenslanders cannot regularly afford groceries

2. Perceived youth crime issue in regional Queensland

3. Satisfaction with Queensland Government performance tackling crime remains low but steady

4. Rising interest rates and migration seen as top contributors to housing shortage

5. Financial barriers to education and training

6. Healthcare access and affordability remains a moderate concern, particularly in regional Queensland

7. Support for Voice to Parliament remains down

BACKGROUND AND APPROACH

Background and objectives

Background

The Department of Premier and Cabinet (DPC) aims to conduct longitudinal research to gain insights about a range of issues facing everyday Queenslanders, and to track and understand the ongoing response to the government's updated Objectives for the Community.

Briefly, these Objectives include:

- Secure jobs in our traditional and emerging industries.
- Deliver even better services right across Queensland.
- Protect and enhance our Queensland lifestyle as we grow, including creating opportunities for First Nations Queenslanders to thrive in modern Queensland.

The findings from this ongoing research provide greater understanding of Queenslanders' views and expectations. Additionally, they help the Government identify any issues or concerns as they progress through the goal of growth and prosperity, and inform Government response and policy directions to enable programs and services to be tailored and targeted to the needs of the community.

Research objectives

The ongoing objectives of this longitudinal research are to:

- **Gain insights** about a range of issues facing everyday Queenslanders.
- **Examine Queenslanders views** and ongoing response to the government's updated Objectives for the Community.
- **Identify any issues, concerns and/or potential barriers** to success to future policy direction as the government drives its forward agenda of growth and prosperity.
- **Identifying opportunities to create and sustain value** for government and its stakeholders – with insights that may help inform and/or enable policies/programs/services to be tailored and targeted to the needs of the community.

Approach and sample

The research consists of a 10 wave (6-weekly) tracking program using a 15 minute online questionnaire of n=1,200 Queenslanders per wave. Quotas are applied for age, gender and region.

Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9	Wave 10
Fieldwork period 26 May – 6 Jun 2023	**Fieldwork period** 3 May – 14 Jul 2023	**Fieldwork period** 15 – 28 Aug 2023	**Expected fieldwork period** W/C 25 Sep – 2 Oct 2023	**Expected fieldwork period** W/C 6 – 11 Nov 2023	**Expected fieldwork period** W/C 18 Dec 2023 – 8 Jan 2024	**Expected fieldwork period** W/C 12 – 19 Feb 2024	**Expected fieldwork period** W/C 25 Mar – 1 Apr 2024	**Expected fieldwork period** W/C 6 – 13 May 2024	**Expected fieldwork period** W/C 17 – 24 Jun 2024

Reporting notes:

- **Weighting**: The weighting scheme was updated in Wave 3, including previous waves. The weighting is a multi-stage weighting with RIM weight of Age and Gender within each region, and then merged for each wave. Weighting uses ABS 2021 census data, for age, gender and region.
- **Significance testing**: Significant differences at 95% confidence intervals are shown on each slide, with the comparison groups shown in the legend:
    - Between subgroups ▲▼
    - Between waves 🟩🟥
    - Significantly different than total %%

Context

When looking at these findings, it is important to keep in mind the context that took place within Queensland during or close to the fieldwork period which impacted the social and political climate. These include:

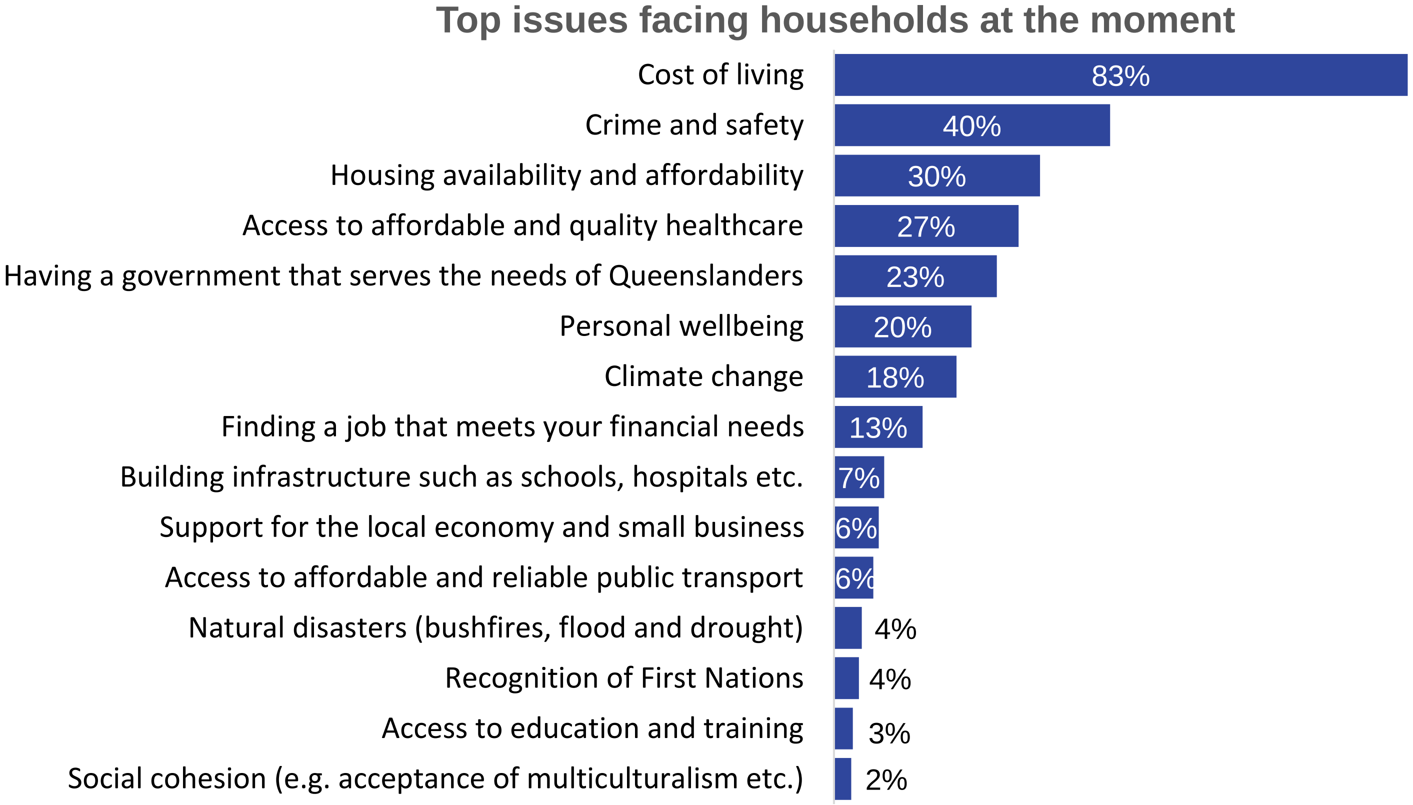
- The Reserve Bank of Australia hiked interest rates on 6th June 2023 to 4.1%, leading to the highest interest rates in 12 years.
  - This was then held steady until August 2023.
- The housing crisis and increasing rate of homelessness within the community we saw throughout the end of 2022 has continued through the first half of 2023.
- The Queensland budget for 2023-24 was released on 13th June 2023, including announcements for:
  - $550 energy rebate
  - 15 hours per week of free kindergarten from January 2024 for all 4-year-old Queensland children
  - $2.88 billion additional for Qld Health
  - Additional $1.25 billion over 5 years for housing and homelessness across Queensland
  - Total commitments of $88.729 billion over 4 years for The Big Build
  - Renewable energy targets outlined in the Queensland Energy and Jobs Plan
- Legislation of a bill to hold a referendum to vote on an Indigenous Voice to Parliament was passed in the Federal Parliament on 19th June 2023.
  - The date was set for the referendum to be held on the 14th October 2023 (set on the 30th August).
- The Queensland Government's 'Concessions' communication campaign launched 11th June 2023.
  - Energy-efficient appliances rebate announced 4 Sep 2023.
- Australia hosted the FIFA Women's World Cup, with games hosted in Brisbane (July-Aug 2023).
- New single-use plastic bans come into effect on 1 Sep 2023.
- 24 Aug 2023, Queensland government fast-tracked new laws to allow children to be held in police watch houses for adults.

A quarter of Queenslanders cannot regularly afford groceries

1

Cost of living remains top-of-mind for Queenslanders

The September Ipsos Issues Monitor* also has cost of living as the top issue for Australians (62%) and Queenslanders (59%), although it is down slightly from the Monitor's record high of June (Australia: 68%).



Cost of living
First Nations – 64%▼

Crime and safety
50+ years – 47%▲

Housing availability and affordability
18-49 years – 39%▲

Access to affordable and quality healthcare
50+ years – 34%▲

Government that serves the needs of Qlders
50+ years – 32%▲
Males – 28%▲

Finding a job that meets your financial needs
18-49 years – 18%▲

Recognition of First Nations
First Nations – 26%▲
Parents living with children – 6%▲

Access to education and training
First Nations – 10%▲
Parents living with children – 5%▲

*Ipsos Issues Monitor, base n=1,000 Australia monthly (Sep 2023), n=600 Queensland (Jul-Sep 2023), we ask Australians to select the three most important issues facing their state.

▲▼ Significantly higher/lower than total @ 95% CI

Q1. From the following list, please select the top three most important issues facing you or your household at the moment. Total wave 3 sample, base n = 1200.

Groceries are a top issue for four in five Queenslanders, although this is decreasing

After groceries, fuel prices were more likely to be an issue this wave, likely driven by the fuel price increase after a dip in July.

The September Ipsos Issues Monitor* shows that 63% of Queenslanders are somewhat or very likely to shop around for better grocery prices (Australia: 59%), similar to 64% who say they shop around for better insurance prices, and over 55% for energy providers.

Top cost of living issues

% Selected (max 3)	**Wave 1 Total**	**Wave 2 Total**	**Wave 3 Total**
Weekly groceries	82%	84%	80%
Utility payments such as electricity and water	54%	53%	50%
Fuel prices	52%	**45%**	**56%**
Insurance	27%	31%	30%
Paying rent	30%	26%	26%
Mortgage repayments	25%	29%	25%
Going on holidays	9%	8%	10%
Eating out	6%	8%	8%
Childcare costs	5%	5%	3%
School fees	3%	2%	4%
Other	2%	2%	2%
Don't know	1%	1%	0%

Weekly groceries
50+ years – 84%▲
Wide Bay – 89%▲
Low income – 85%▲

Utility payments
50+ years – 58%▲

Fuel
50+ years – 62%▲
ROQ – 61%▲

Insurance
50+ years – 44%▲
Parents living with children – 21%▼
First Nations – 10%▼

Paying rent
18-49 years – 34%▲
Low income – 33%▲
First Nations – 54%▲

Mortgage repayments
18-49 years – 35%▲
Parents living with children – 40%▲
Low income – 12%▼
CALD – 42%▲

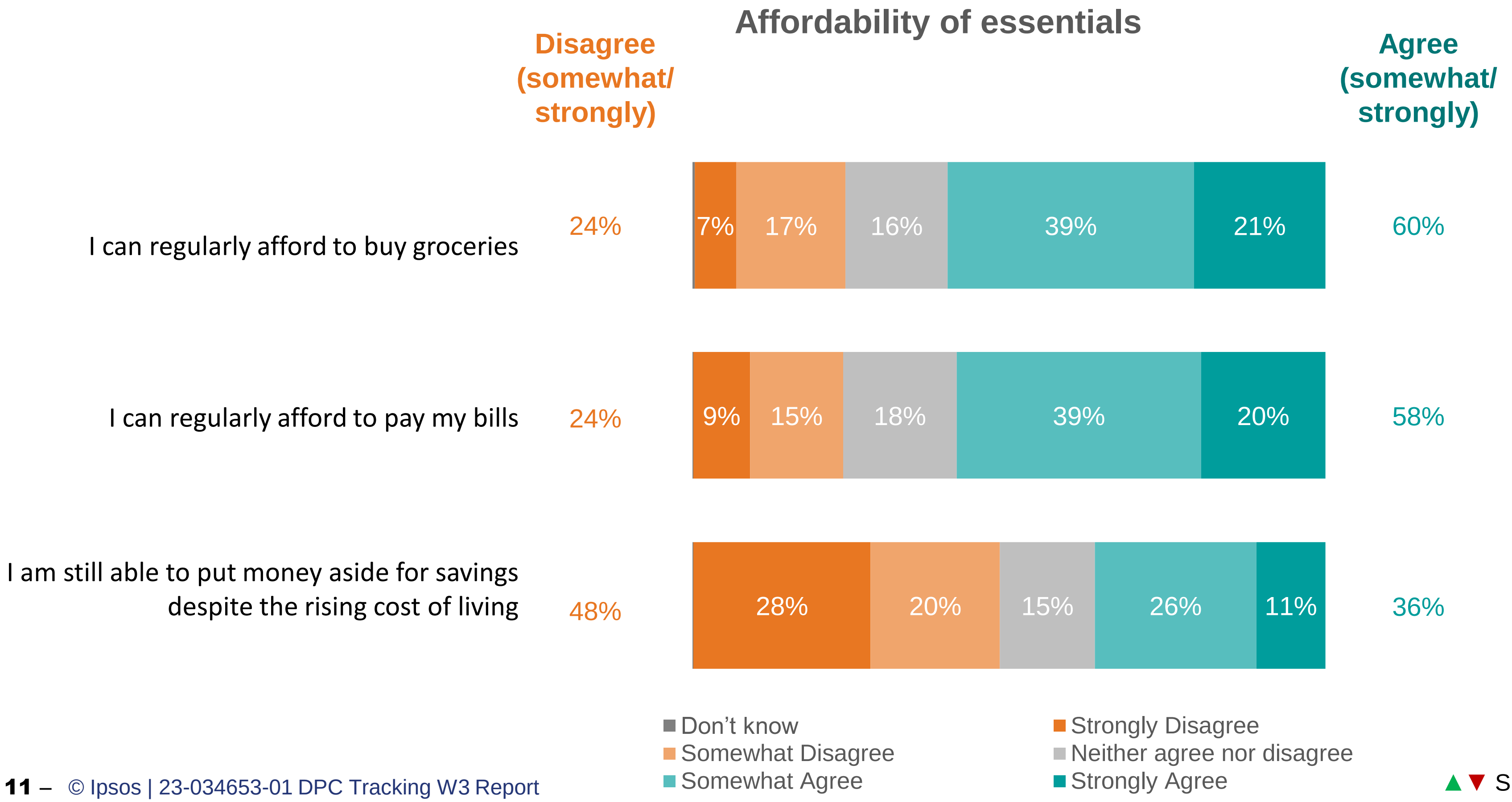
*Ipsos Issues Monitor, base n=1,000 Australia monthly (Sep 2023), n=201 Queensland, Q. How likely are you to shop around for a better deal regarding the following household expenses?

▲▼ Significantly higher/lower than total @ 95% CI

Q5. Below is a list of issues that are impacted by the rising costs of living. Which three of the following issues affect you the most? Total sample, base n = 1,200 per wave.

A quarter of Queenslanders cannot regularly afford groceries or bills

When looking at Queenslanders with a low income, almost half struggle to pay for groceries and bills. Only a third of Queenslanders say they are able to put money aside for savings.



Agree
Afford to buy groceries
Low income – 46%▼
First Nations – 33%▼

Afford to pay my bills
50+ years – 64%▲
Males – 66%▲
Low income – 49%▼

Able to put money aside for savings
Low income – 21%▼

▲▼ Significantly higher/lower than total @ 95% CI

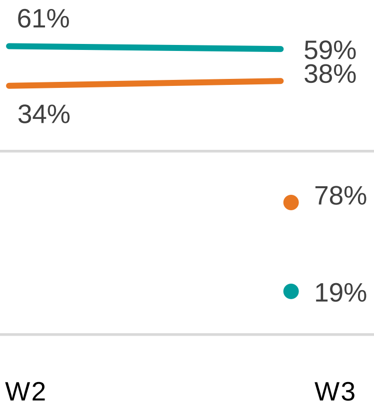
Q44. Please rate the extent to which you agree or disagree with the following statements. Total wave 3 sample, base n = 1200.

Three in five Queenslanders are aware of the energy rebate

The Concessions campaign* saw very early campaign impacts across a range of outcomes including awareness and uptake of concessions, and importantly, ratings of the Queensland Government are improving for those that have seen the campaign.

One in five Queensland have sought government assistance, with younger Queenslanders (18-49 years), those with low income, and First Nations more likely to have sought assistance in the past year.

Question	Measure	Trend
Q41. Are you aware of the Queensland Government $550 cost of living energy rebate announced in the recent State budget?	Yes	
	No	
Q46. Have you sought government assistance to respond to cost-of-living pressures within the last 12 months?	Yes	
	No	



Wave 3: Aware
50+ years – 71% ▲
CALD – 41%▼

Wave 3: Sought assistance
18-49 years – 23%▲
Low income – 25%▲
First Nations – 44%▲

Concessions Campaign finding: *Awareness of energy rebates is high (67%). However, only half (50%) of respondents say they have received an energy rebate. As the energy supplier takes the energy rebate off the bill automatically, this can lower the profile of the rebate and may be causing this confusion around the receipt of the energy rebate.*

*Ipsos conducted the Concessions campaign mid-wave survey 10/07/23 to 13/07/23, with base n=1,000 Queenslanders.

▲▼ Significantly higher/lower than total @ 95% CI

Q46. Have you sought government assistance to respond to cost-of-living pressures within the last 12 months? Q41. Are you aware of the Queensland Government $550 cost of living energy rebate announced in the recent State budget? Total wave 3 sample, base n = 1200.

Federal and then State Government policies are considered the top contributors to rising cost of living

Fewer Queenslanders consider Housing pressures as a contributor this wave, although this remains the 3rd top issue, and is higher for younger Queenslanders. More Queenslanders consider low unemployment a contributor, a belief that is also higher for younger Queenslanders.

Top cost of living contributors

% Selected (max 3)	Wave 1 Total	Wave 2 Total	Wave 3 Total
Federal Government policies	-	53%	53%
State Government policies	-	45%	47%
Housing pressures	-	48%	**43%**
Overseas markets	-	32%	32%
War in Ukraine	-	27%	27%
Natural disasters	-	15%	16%
Climate change	-	12%	14%
Low unemployment	-	10%	**14%**
Other	-	10%	10%
Don't know	-	8%	6%

Wave 3:

Housing pressures
18-49 years – 51%▲

War in Ukraine
50+ years – 32%▲
CALD – 43%▲

Overseas markets
First Nations – 16%▼

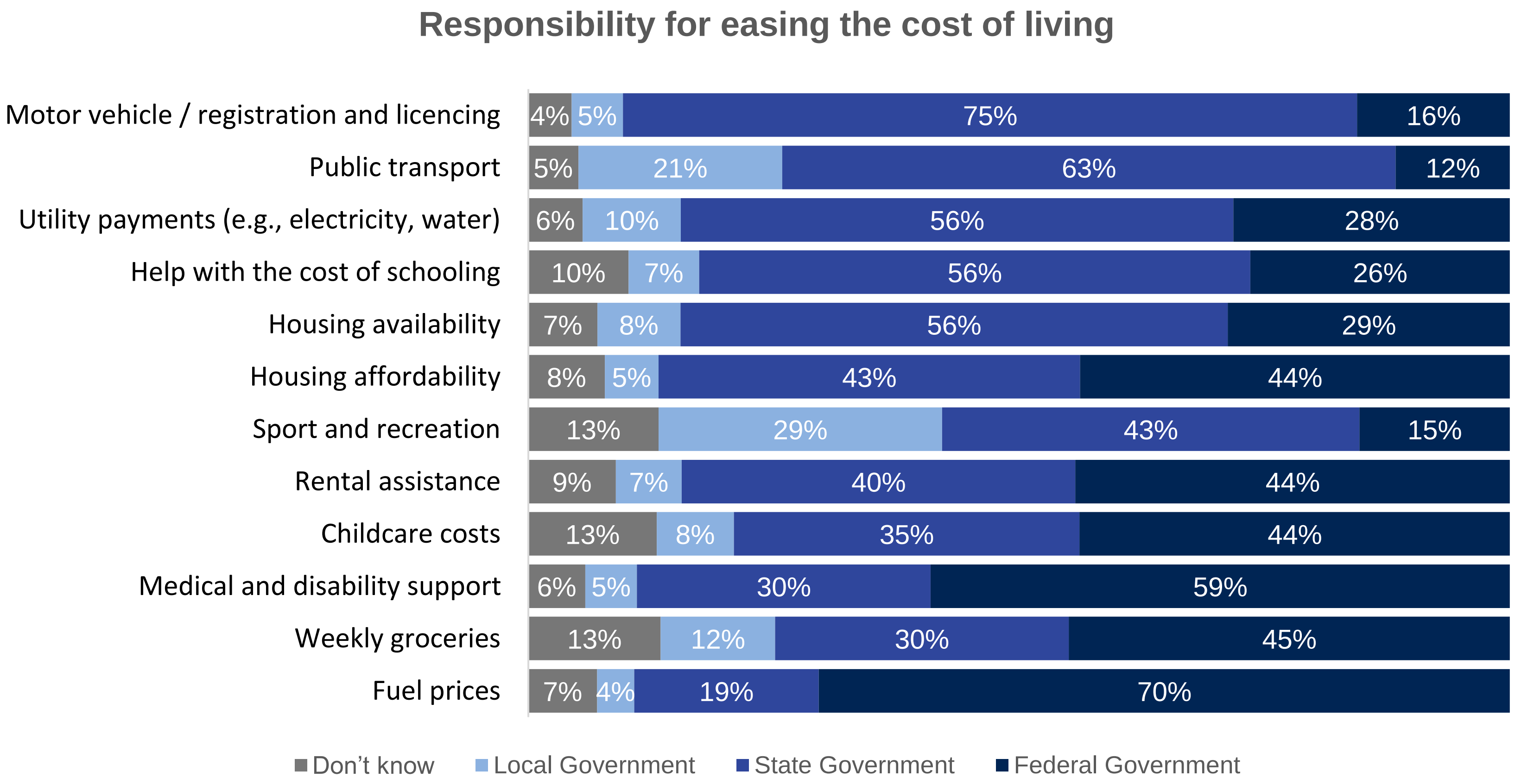
Low unemployment
18-49 years – 18%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q39. Please select up to three items from the following list that you believe have contributed the most to the rising cost of living. Total sample, base n = 1,200 per wave.

Queenslanders consider the Federal Government primarily responsible for easing the cost of groceries

The level of government Queenslanders consider most responsible for providing cost of living assistance varies on issue. Queenslanders consider State Government to have the most responsibility for easing issues around vehicles and transport, and is considered most responsible for 6 of the 12 issues discussed, with similar levels to Federal Government for rental assistance and housing affordability. Federal Government is considered most responsible for fuel prices and then medical and disability support.



Wave 3: State government

Motor vehicle/registration and licensing
50+ years – 83%▲

Public transport
50+ years – 72%▲
Male – 68%▲

Utility payments
50+ years – 65%▲

Housing availability
50+ years – 62%▲

Sport and recreation
50+ years – 48%▲
Low income – 49%▲

Medical and disability support
Male – 34%▲
ROQ – 35%▲

Fuel prices
18-49 years – 23%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q43. When it comes to easing the cost of living, which level of government do you believe has most responsibility for providing assistance for: Total wave 3 sample, base n = 1200.

After a year of rising cost-of-living concerns, we are starting to see a decrease in life satisfaction

We see significant declines in those who are satisfied with their personal relationships, standards of living, health, and life achievements, many of these being driven by those with low incomes.

Those in Far North Queensland are lower than other regions in how safe they feel, and this has decreased over the past two waves (W1: 53%, W2: 47%, W3: 41%).

Satisfaction with aspects of life

% Satisfied	Wave 1	Wave 2	Wave 3
Your personal relationships	70%	74%	68%
Your standard of living	62%	64%	58%
Your health	59%	62%	57%
How safe you feel	62%	61%	57%
What you are achieving in life	60%	60%	54%
Feeling part of your community	52%	52%	47%
Your future security	49%	50%	46%

Wave 3: Satisfied

Standard of living
50+ years – 64%▲
Low income – 47%▼

How safe you feel
Far North Qld – 41%▼

What you are achieving in life
Low income – 46%▼

▲▼ Significantly higher/lower than total @ 95% CI

Q27 How satisfied or dissatisfied are you with the following aspects of your personal life? Total sample, base n = 1,200 per wave.

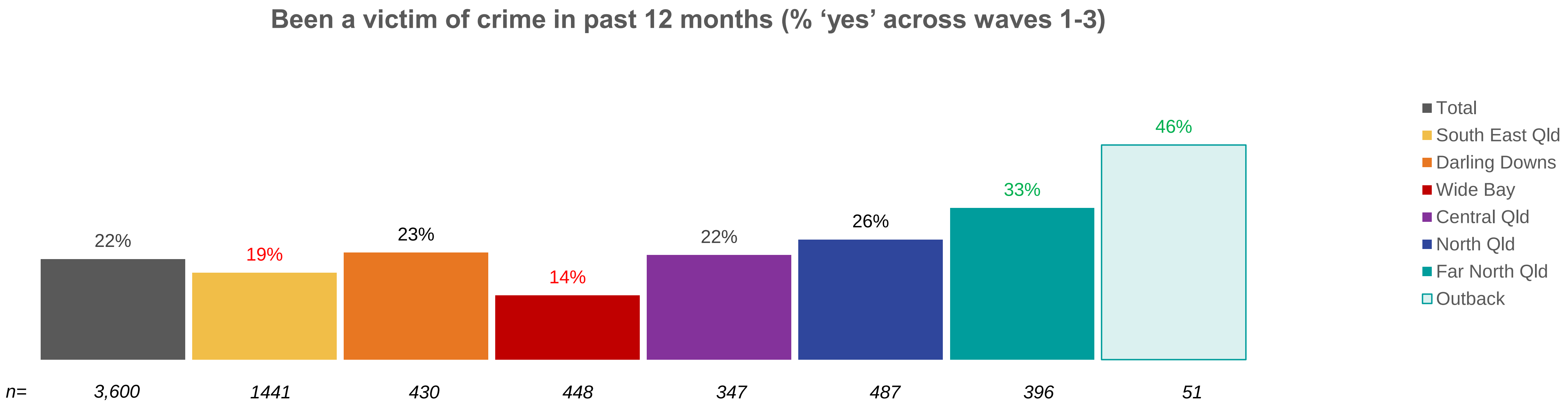
Perceived youth crime issue in regional Queensland

2

Three-wave crime coverage

Respondents from Far North and Outback Queensland are more likely to have been a victim of crime in the past 12 months

And respondents from Wide Bay and SEQ are less likely to have been a victim of crime. This is important context when looking at the regional differences in perception of crime and safety.

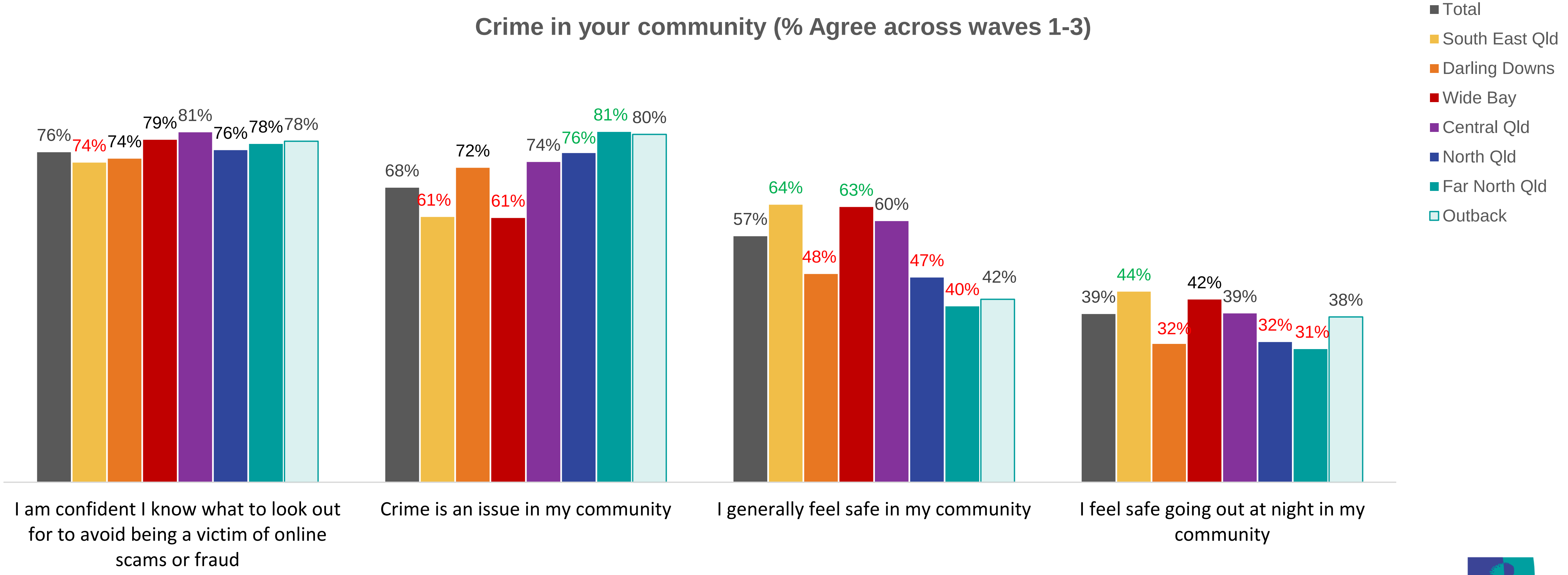


%% Significantly higher/lower than total @ 95% CI

Q14. In the past 12 months, have you, or someone in your household, been a victim of crime in your community? Total wave2 1-3 sample, base n = 3600.

Crime is more likely to be considered an issue in regional Queensland communities

When averaging across the last 3 months, SEQ and Wide Bay are less likely to consider crime and safety an issue in their community, whereas crime and safety as a perceived issue is higher in regional Queensland including Darling Downs, North and Far North Queensland, with Outback trending in the same pattern. Central Queensland sits in the middle. This same pattern of results is present when looking at those without first-hand experience of crime in the past 12 months.



Crime in your community (% Agree across waves 1-3)

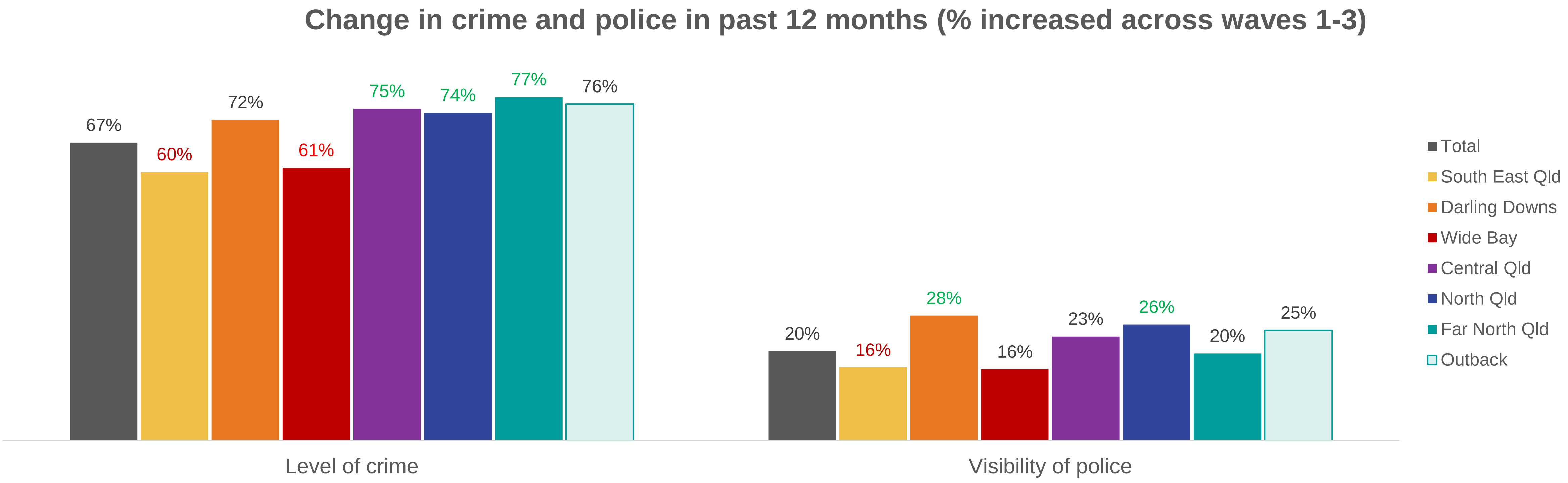
%% Significantly higher/lower than total @ 95% CI

Q16. Please indicate to what extent do you agree or disagree with the following statements. Total wave2 1-3 sample, base n = 3600.

There are higher perceived levels of crime in regional Queensland

This same pattern of results is present when looking at those with or without first-hand experience of crime in the past 12 months. This mostly matches an increased perceived visibility of police, and although these significant differences disappear when looking at victims, the pattern remains the same, with Wide Bay the lowest perceived visibility.

Again, we see that SEQ and Wide Bay are most similar here than the rest of Queensland. Interestingly, while Far North Queensland has the highest perception of crime, it has an average perceived visibility of police, possibly suggesting a great visibility of police might be appreciated.


Change in crime and police in past 12 months (% increased across waves 1-3)

%% Significantly higher/lower than total @ 95% CI

Q17. Reflecting on the last 12 months, please indicate whether you think each of the following has increased or decreased in your community. Total wave2 1-3 sample, base n = 3600.

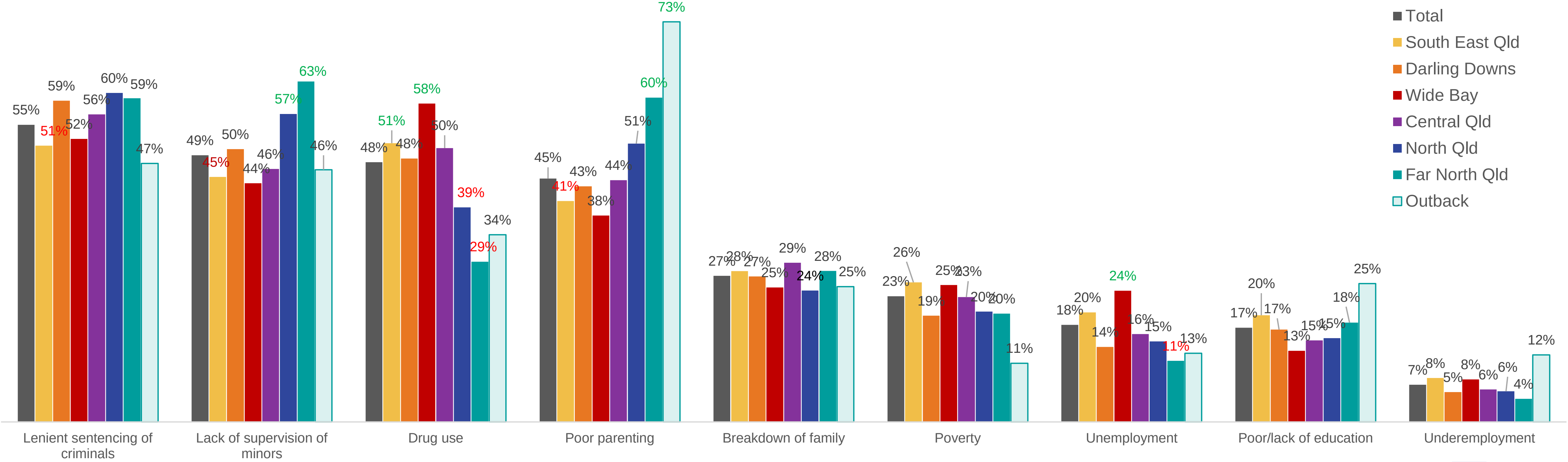
Perceived drivers of crime differ by location

However, lenient sentencing, lack of supervision, drug use and poor parenting are the top nominations across all regions.

After lenient sentencing, North, Far North and Outback Queenslanders attribute criminal activity to poor parenting and lack of supervision. Conversely, regions where crime is considered less of an issue (SEQ and Wide Bay) are more likely to attribute more serious adult issues such as drug use, and unemployment is also cited significantly more in Wide Bay.

This suggests that in those regions where crime is an issue, it is considered to be an issue of adolescence.

Top reasons why people commit crime (across waves 1-3)

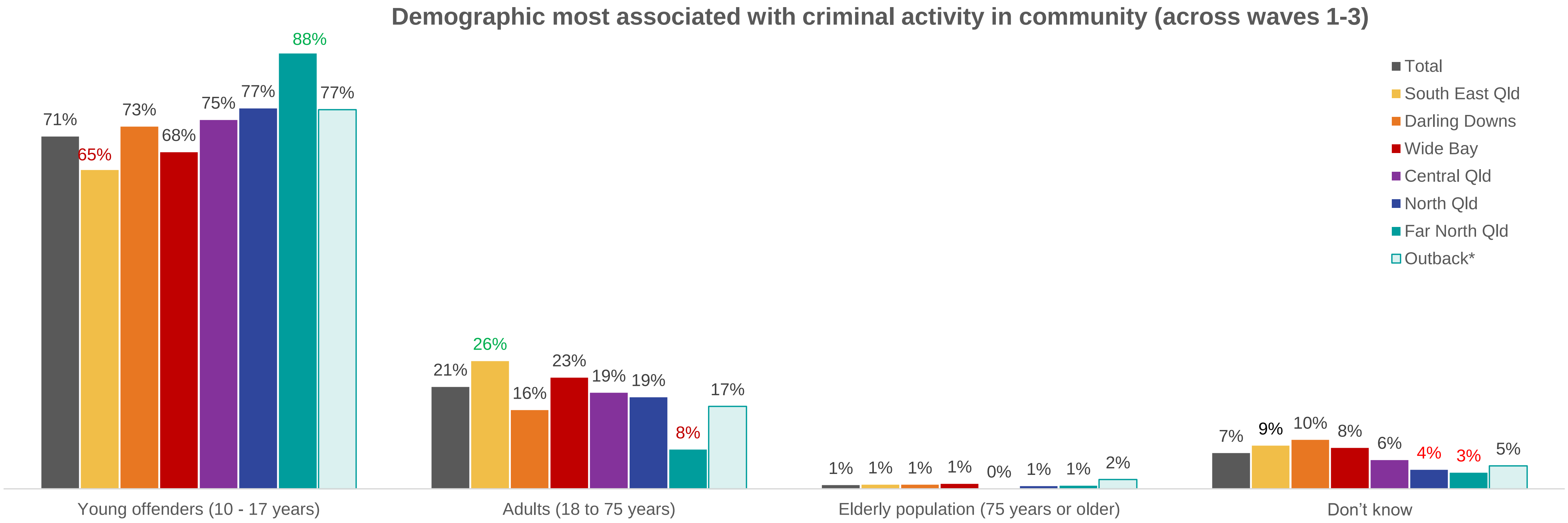


%% Significantly higher/lower than total @ 95% CI

Q20. Thinking about the reasons that may cause people to commit crimes, what do you think is the most common reason? Total wave2 1-3 sample, base n = 3600.

Perceived demographics reflect perceived drivers of criminal activity

Consistent with criminal reasons, Far North Queenslanders are more likely to associate criminal activity with adolescents, and those in SEQ are more likely to associate it with adults.



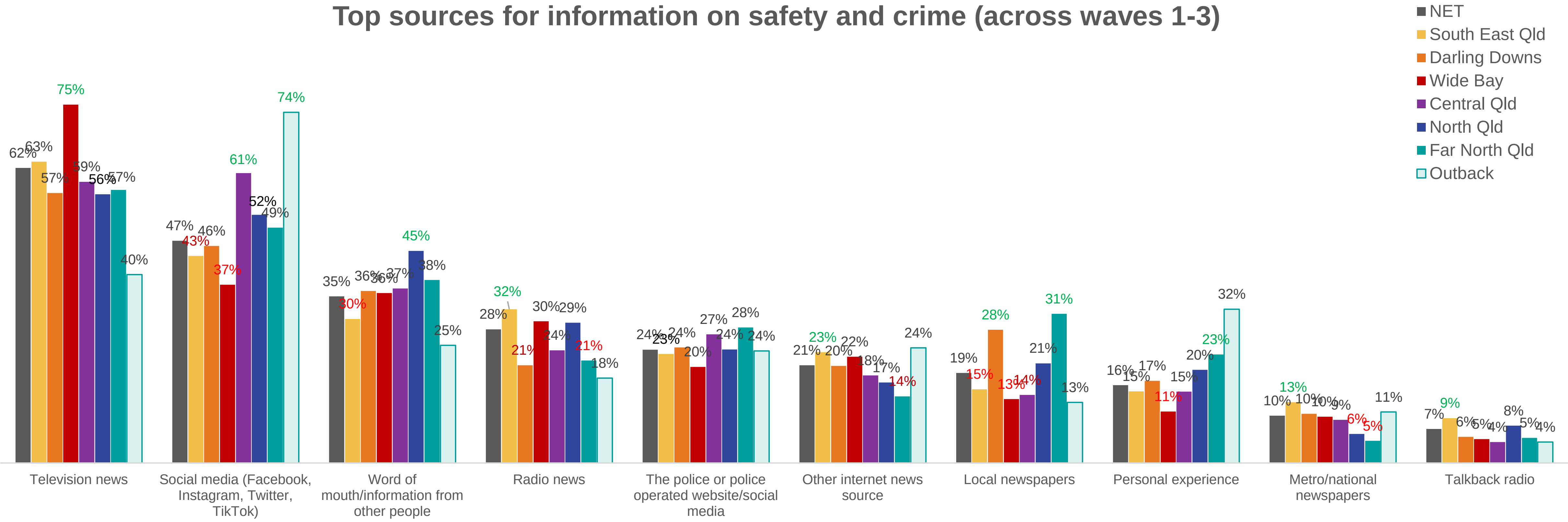
%% Significantly higher/lower than total @ 95% CI

Q18. What demographic do you believe is most commonly associated with criminal activity in your community? Total wave2 1-3 sample, base n = 3600.

Preferred information sources for crime news differ by region

Those in SEQ and Wide Bay are most likely to prefer TV and to a lesser extent radio news. Central and Outback Queensland are most likely to rely on social media.

While TV is highest for Darling Downs and Far North Queensland, social media is similar and word of mouth isn't far behind. These two regions are also significantly more likely to rely on local newspapers compared to other regions.


Top sources for information on safety and crime (across waves 1-3)

%% Significantly higher/lower than total @ 95% CI

Q13. Please indicate your top three primary sources for information on safety and crime? Total wave2 1-3 sample, base n = 3600.

Satisfaction with Queensland Government performance on tackling crime remains low but steady

3

Crime and safety remains a top issues facing Queensland households

Crime appears to be a bigger issue in Queensland than the rest of Australia, with crime being the 3rd top issue facing Queenslanders (39%) when asked to select the three most important issues facing their state in the September Ipsos Issues Monitor*, compared to 5th for Australia (18%). Crime is more likely to be chosen as a top issue for older Queenslanders.

Top issues facing households at the moment

% Selected (max 3)	Wave 1 Total	Wave 2 Total	Wave 3 Total
Cost of living	82%	83%	83%
Crime and safety	39%	40%	40%
Housing availability and affordability	31%	28%	30%
Access to affordable and quality healthcare	26%	**32%**	**27%**
Having a government that serves the needs of Queenslanders	20%	23%	23%
Personal wellbeing	23%	22%	20%
Climate change	11%	12%	**18%**
Finding a job that meets your financial needs	13%	15%	13%
Building infrastructure such as schools, hospitals, public housing and roads	8%	9%	7%
Support for the local economy and small business	7%	7%	6%
Access to affordable and reliable public transport	5%	4%	6%
Natural disasters (bushfires, flood and drought)	4%	3%	4%
Recognition of First Nations	3%	3%	4%
Access to education and training	3%	3%	3%
Social cohesion (e.g. acceptance of multiculturalism, religious groups living in harmony etc)	3%	3%	2%

Wave 3:

Cost of living
First Nations – 64%▼

Crime and safety
50+ years – 47%▲

Housing availability and affordability
18-49 years – 39%▲

Access to affordable and quality healthcare
50+ years – 34%▲

Government that serves the needs of Qlders
50+ years – 32%▲
Males – 28%▲

Finding a job that meets your financial needs
18-49 years – 18%▲

Recognition of First Nations
First Nations – 26%▲
Parents living with children – 6%▲

Access to education and training
First Nations – 10%▲
Parents living with children – 5%▲

*Ipsos Issues Monitor, base n=1,000 Australia monthly (Sep 2023), n=600 Queensland (Jul-Sep 2023), we ask Australians to select the three most important issues facing their state.

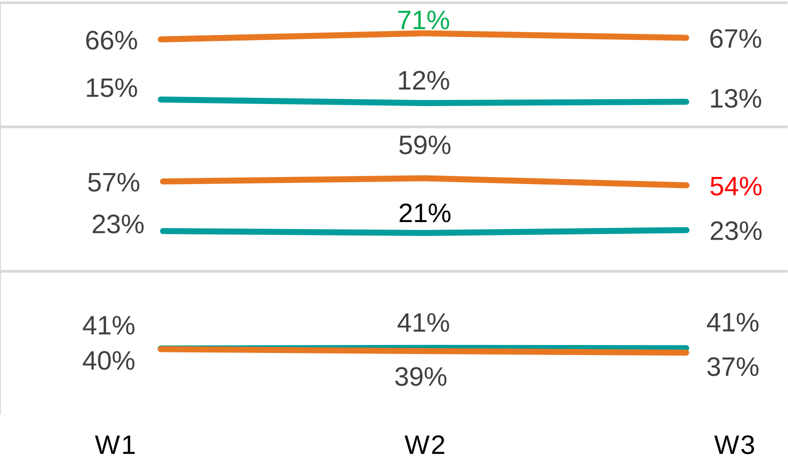
▲▼ Significantly higher/lower than total @ 95% CI

Q1. From the following list, please select the top three most important issues facing you or your household at the moment. Total sample, base n = 1,200 per wave.

Fewer negative associations with community safety

Queenslanders are less likely to disagree that they ‘generally feel safe in my community’, although those in regional Queensland are less likely to agree that they feel safe, particularly in Far North Queensland. Crime as a perceived issue has trended back to wave 1 levels after a spike in wave 2, with females and those with low income reporting less likelihood to feel safe going out at night.

Crime in your community



Question	Measure	W1	W2	W3
Crime is an issue in my community	Agree	66%	71%	67%
	Disagree	15%	12%	13%
I generally feel safe in my community	Agree	57%	59%	54%
	Disagree	23%	21%	23%
I feel safe going out at night in my community	Agree	41%	41%	41%
	Disagree	40%	39%	37%

Agree:

Crime is an issue
CALD – 45%▼

I generally feel safe
ROQ (Far North Qld) – 50%▼ (40%▼)

I feel safe going out at night
Male – 49%▲
Low income – 29%▼

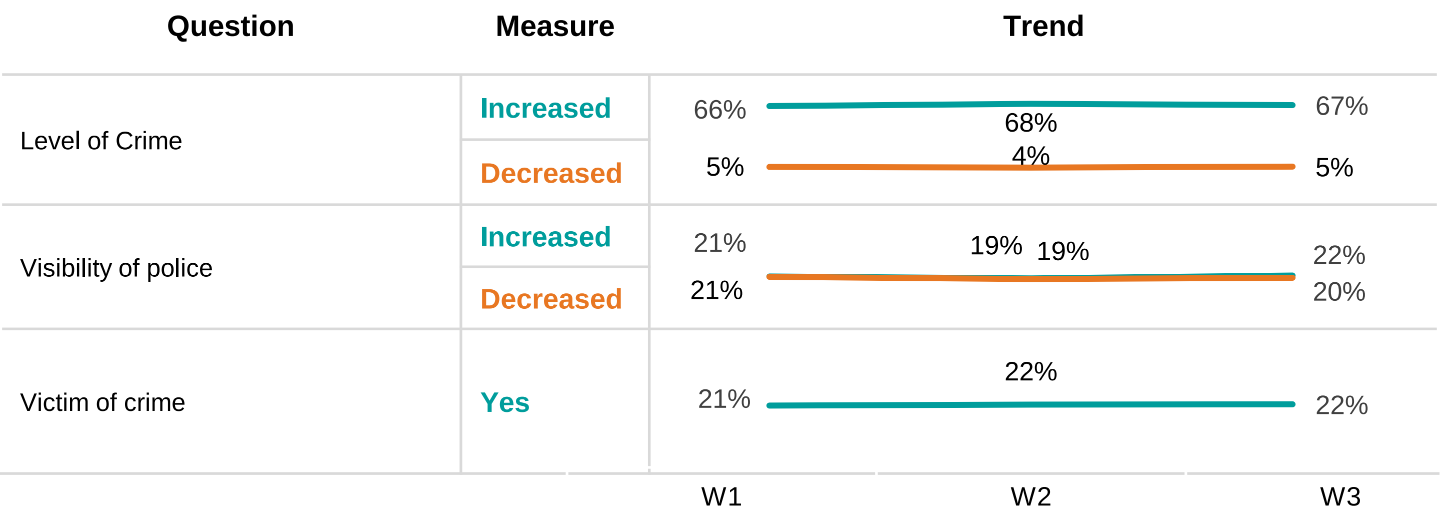
▲▼ Significantly higher/lower than total @ 95% CI

Q16. Please indicate to what extent do you agree or disagree with the following statements. Total sample, base n = 1,200 per wave.

Queenslanders’ experience with crime and police remains steady

There are no significant changes to the perceived levels of crime and visibility of police this wave, with the same subgroups showing higher perceptions of increased police visibility.

Experience with crime and police



Question	Measure	Trend		
		W1	W2	W3
Level of Crime	Increased	66%	68%	67%
	Decreased	5%	4%	5%
Visibility of police	Increased	21%	19%	22%
	Decreased	21%	19%	20%
Victim of crime	Yes	21%	22%	22%

Increased:
Visibility of police
18-49 years – 26%▲
Female – 25%▲
Parents living with children – 26%▲
First Nations – 38%▲

Yes (victim of crime)
18-49 years – 29%▲
Far North Qld – 31%▲
First Nations – 46%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q17. Reflecting on the last 12 months, please indicate whether you think each of the following has increased or decreased in your community. Q14. In the past 12 months, have you, or someone in your household, been a victim of crime in your community. Total sample, base n = 1,200 per wave.

Satisfaction with Queensland Government performance on tackling crime remains low but stable

And this is higher among First Nations peoples.

Satisfaction with Qld state government performance

% Satisfied	Wave 1	Wave 2	Wave 3
Managing natural disaster and emergency preparedness	46%	51%	49%
Delivering quality education and training	37%	42%	37%
Creating jobs for Queenslanders	31%	32%	33%
Building local infrastructure (such as schools, hospitals, public housing and roads)	29%	33%	30%
Delivering quality healthcare services	30%	31%	32%
Maintaining a quality lifestyle for Queenslanders	28%	31%	29%
Being a trustworthy government	24%	24%	25%
Managing population and economic growth	23%	24%	24%
Tackling climate change	21%	21%	23%
Making more homes and land available	15%	16%	16%
Tackling crime	15%	15%	15%
Easing the cost of living	10%	9%	11%
Making housing more affordable	9%	10%	9%

Wave 3: Satisfied
Creating Jobs for Queenslanders
Low income – 26%▼

Maintaining a quality lifestyle
Low income – 21%▼
CALD – 49%▲

Being a trustworthy government
CALD – 42%▲

Making more homes and land available
18-49 years – 20%▲
First Nations – 33%▲

Tackling crime
First Nations – 32%▲

Making housing more affordable
First Nations – 24%▲

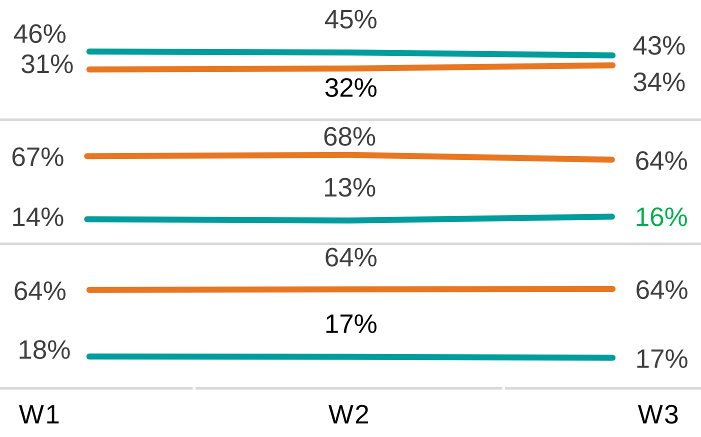
▲▼ Significantly higher/lower than total @ 95% CI

Q2. Satisfaction with Qld state government performance. Total sample, base n = 1,200 per wave.

Satisfaction with the Courts’ response to local crime and anti social behaviour has increased

However, two thirds of Queenslanders remain dissatisfied with the response from both the Courts and Queensland Government. Local police response continues to show the highest level of satisfaction out of the three categories.

Satisfaction with response to local crime and anti social behaviour



Question	Measure	Trend		
		W1	W2	W3
The local police	Satisfied	46%	45%	43%
	Dissatisfied	31%	32%	34%
Courts	Satisfied	67%	68%	64%
	Dissatisfied	14%	13%	16%
Queensland Government	Satisfied	64%	64%	64%
	Dissatisfied	18%	17%	17%

Wave 3: Satisfied

Courts
18-49 years – 22%▲
First Nations – 39%▲

Queensland government
18-49 years – 21%▲
First Nations – 38%▲
CALD – 33%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q15. Satisfaction with response to local crime and anti social behaviour. Total sample, base n = 1,200 per wave.

Rising interest rates and migration seen as top contributors to housing shortage

4

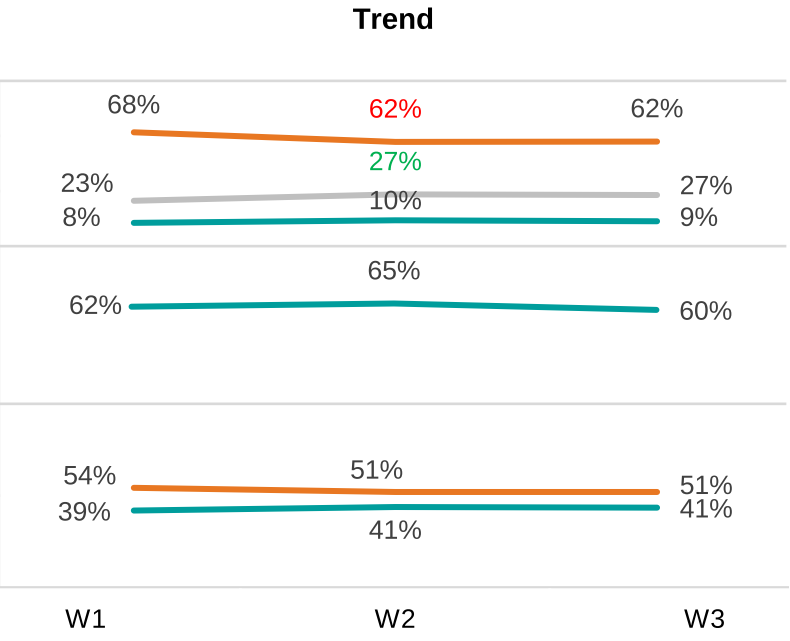
Half of Queenslanders spend more than 30% of their income on housing

The September Ipsos Issues Monitor* has Housing as the second most important issue for Queenslanders (45%) after cost of living, which is 7pts higher than at a national level (38%).

While 60% of Queenslanders feel secure in their housing situation, this decreases to 40% for those with more than 30% of their income going towards housing. Financial situation has remained stable this wave, with 62% of Queenslanders saying their financial situation is worse than this time last year.

Personal finances and housing

Question	Measure
Q8. Do you think your personal financial circumstances have gotten better, worse or stayed the same, compared to this time last year?	Gotten better
	Stayed the same
	Gotten worse
Q6. How do you feel about your current housing situation?	Secure
Q7. Whether you have a mortgage or are paying for a private rental, which statement best applies to you? (Sample with mortgage/rent payments)	Equal to or less than 30% of income
	Greater than 30% of income



Wave 3:
Gotten better
18-49 years – 13% ▲
Low income – 4% ▼

Stayed the same
50+ years – 31% ▲

Gotten worse
Low income – 71% ▲

Wave 3: Secure
50+ years – 70% ▲
CALD – 42% ▼

*Ipsos Issues Monitor, base n=1,000 Australia monthly (Sep 2023), n=600 Queensland (Jul-Sep 2023), we ask Australians to select the three most important issues facing their state.

▲▼ Significantly higher/lower than total @ 95% CI

Q8. Do you think your personal financial circumstances have gotten better, worse or stayed the same, compared to this time last year? Total sample, base n = 1,200 per wave.

Q6. How do you feel about your current housing situation? Sample with mortgage/rent payments, wave 1/2/3 base n = 825/871/847. Q7. Whether you have a mortgage or are paying for a private rental, which statement best applies to you? Total sample, base n = 1,200 per wave.

Rising interest rates and migration are seen as top contributors to the housing shortage

Government rules and regulations are also increasingly seen as contributing to the housing shortage. Fewer than one in ten Queenslanders say housing shortages are caused by lack of acceptance of high density housing or land availability.

Top housing shortage contributors

% Selected (max 3)	Wave 1 Total	Wave 2 Total	Wave 3 Total
Rising interest rates	-	46%	44%
Increases in migration to Queensland	-	41%	43%
Lack of government investment in housing	-	34%	32%
Government rules and regulations	-	24%	**28%**
Slower construction due to materials shortage	-	28%	26%
Investors buying multiple properties	-	23%	22%
Vacant homes not being offered for rent	-	20%	20%
Lack of properties being built	-	19%	19%
Increase in short term holiday letting services	-	19%	17%
Lack of acceptance of high density housing	-	10%	10%
Lack of land supply	-	8%	8%
Natural disasters (e.g., fire and flood)	-	6%	5%

Wave 3:
Rising interest rates
18-49 years – 51%▲
Females – 51%▲
Parents living with children – 52%▲
Low income – 36%▼

Increases in migration to Queensland
50+ years – 50%▲

Lack of government investing in housing
50+ years – 38%▲
Low income – 38%▲

Slower construction
50+ years – 30%▲

Lack of properties being built
50+ years – 24%▲
Males – 24%▲

Increase in short term holiday letting
Far North Qld – 28%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q40. Please select up to three items from the following list that you believe have contributed the most to the housing shortage. Total sample, base n = 1,200 per wave.

Financial barriers to education and training

5

After a spike last wave, satisfaction with the Queensland Government's delivery of education is back to levels of wave 1

This spike was driven by younger Queenslanders (18-49 years), who are generally more satisfied with the delivery of education.

Satisfaction with Qld state government performance

% Satisfied	Wave 1	Wave 2	Wave 3
Managing natural disaster and emergency preparedness	46%	51%	49%
Delivering quality education and training	37%	42%	37%
Creating jobs for Queenslanders	31%	32%	33%
Building local infrastructure (such as schools, hospitals, public housing and roads)	29%	33%	30%
Delivering quality healthcare services	30%	31%	32%
Maintaining a quality lifestyle for Queenslanders	28%	31%	29%
Being a trustworthy government	24%	24%	25%
Managing population and economic growth	23%	24%	24%
Tackling climate change	21%	21%	23%
Making more homes and land available	15%	16%	16%
Tackling crime	15%	15%	15%
Easing the cost of living	10%	9%	11%
Making housing more affordable	9%	10%	9%

Wave 3 Satisfied:

Delivering quality education
18-49 years – 41%▲

Creating Jobs for Queenslanders
Low income – 26%▼

Maintaining a quality lifestyle
Low income – 21%▼
CALD – 49%▲

Being a trustworthy government
CALD – 42%▲

Making more homes and land available
18-49 years – 20%▲
First Nations – 33%▲

Tackling crime
First Nations – 32%▲

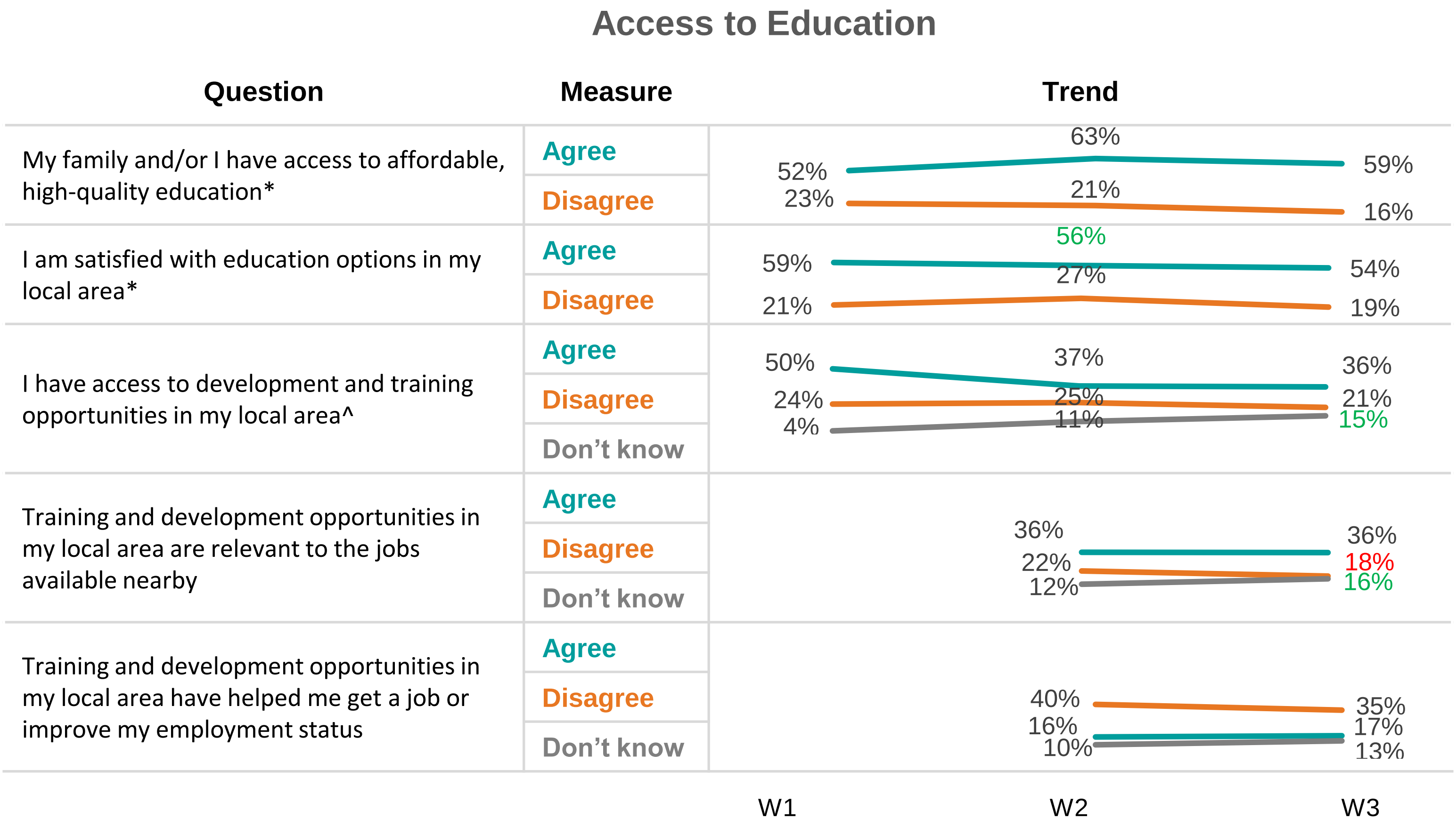
Making housing more affordable
First Nations – 24%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q2. Satisfaction with Qld state government performance. Total sample, base n = 1,200 per wave.

Many Queenslanders are unsure about the accessibility or relevance of available training opportunities

Three in five parents of children 5-17 years indicate they have access to affordable, high-quality education, however parents with low income are less likely to say they have access or are satisfied with their education opportunities in their local area.



Access to Education

Question	Measure	W1	W2	W3
My family and/or I have access to affordable, high-quality education*	Agree	52%	63%	59%
	Disagree	23%	21%	16%
I am satisfied with education options in my local area*	Agree	59%	56%	54%
	Disagree	21%	27%	19%
I have access to development and training opportunities in my local area^	Agree	50%	37%	36%
	Disagree	24%	25%	21%
	Don't know	4%	11%	15%
Training and development opportunities in my local area are relevant to the jobs available nearby	Agree		36%	36%
	Disagree		22%	18%
	Don't know		12%	16%
Training and development opportunities in my local area have helped me get a job or improve my employment status	Agree		16%	17%
	Disagree		40%	35%
	Don't know		10%	13%

Agree:

Access to affordable, high-quality education
SEQ – 71%▲
Low income – 33%▼

Access to development and training
18-49 years – 43%▲
Parents living with children - 47%▲
Low income – 28%▼

Training and development is relevant
18-49 years – 41%▲
Parents living with children - 43%▲
Low income – 28%▼

Training helped me get a job
18-49 years – 25%▲
Parents living with children - 25%▲
Low income – 10%▼

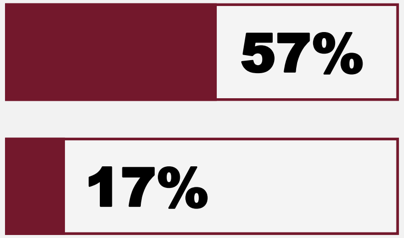
▲▼ Significantly higher/lower than total @ 95% CI

Q9. Please indicate to what extent do you agree or disagree with the following statements. Total sample, base n = 1200 per wave. *Sample with children 5-17 years, wave 2/3 base n = 273/296.
^Question asked of those with children ages 5-17 years in Wave 1, and asked of everyone in Wave 2. No significance testing conducted between wave 1 and 2.

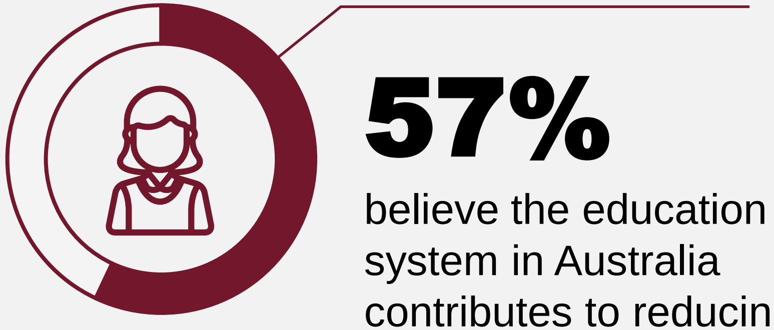
Ipsos Education Monitor 2023: Key stats Australia

The lower perceived access and relevance of education and training experienced by low income Queenslanders suggests there is a financial barrier to education and training, which is supported by the Ipsos Education Monitor 2023 findings, where lack of public funding is the most cited challenge facing the Australian education system.

How do you rate your country's education system?



		Global avg.
GOOD	57%	33%
POOR	17%	36%



57%

believe the education system in Australia contributes to reducing social inequalities.

Global avg.

51%

Most cited challenge facing the education system:

Lack of public funding

Base: 23,248 online adults across 29 countries between 23rd June and 7th July, 2023, including 1000 in Australia.

Healthcare access and affordability remains a moderate concern, particularly in regional Queensland

6

After a spike into the top 3 last wave, healthcare is back to number 4 on list of issues facing Queensland households

This remains a bigger issue for older Queenslanders, but is still far behind cost of living.

Top issues facing households at the moment

% Selected (max 3)	Wave 1 Total	Wave 2 Total	Wave 3 Total
Cost of living	82%	83%	83%
Crime and safety	39%	40%	40%
Housing availability and affordability	31%	28%	30%
Access to affordable and quality healthcare	26%	32%	27%
Having a government that serves the needs of Queenslanders	20%	23%	23%
Personal wellbeing	23%	22%	20%
Climate change	11%	12%	18%
Finding a job that meets your financial needs	13%	15%	13%
Building infrastructure such as schools, hospitals, public housing and roads	8%	9%	7%
Support for the local economy and small business	7%	7%	6%
Access to affordable and reliable public transport	5%	4%	6%
Natural disasters (bushfires, flood and drought)	4%	3%	4%
Recognition of First Nations	3%	3%	4%
Access to education and training	3%	3%	3%
Social cohesion (e.g. acceptance of multiculturalism, religious groups living in harmony etc)	3%	3%	2%

Wave 3:

Cost of living
First Nations – 64%▼

Crime and safety
50+ years – 47%▲

Housing availability and affordability
18-49 years – 39%▲

Access to affordable and quality healthcare
50+ years – 34%▲

Government that serves the needs of Qlders
50+ years – 32%▲
Males – 28%▲

Finding a job that meets your financial needs
18-49 years – 18%▲

Recognition of First Nations
First Nations – 26%▲
Parents living with children – 6%▲

Access to education and training
First Nations – 10%▲
Parents living with children – 5%▲

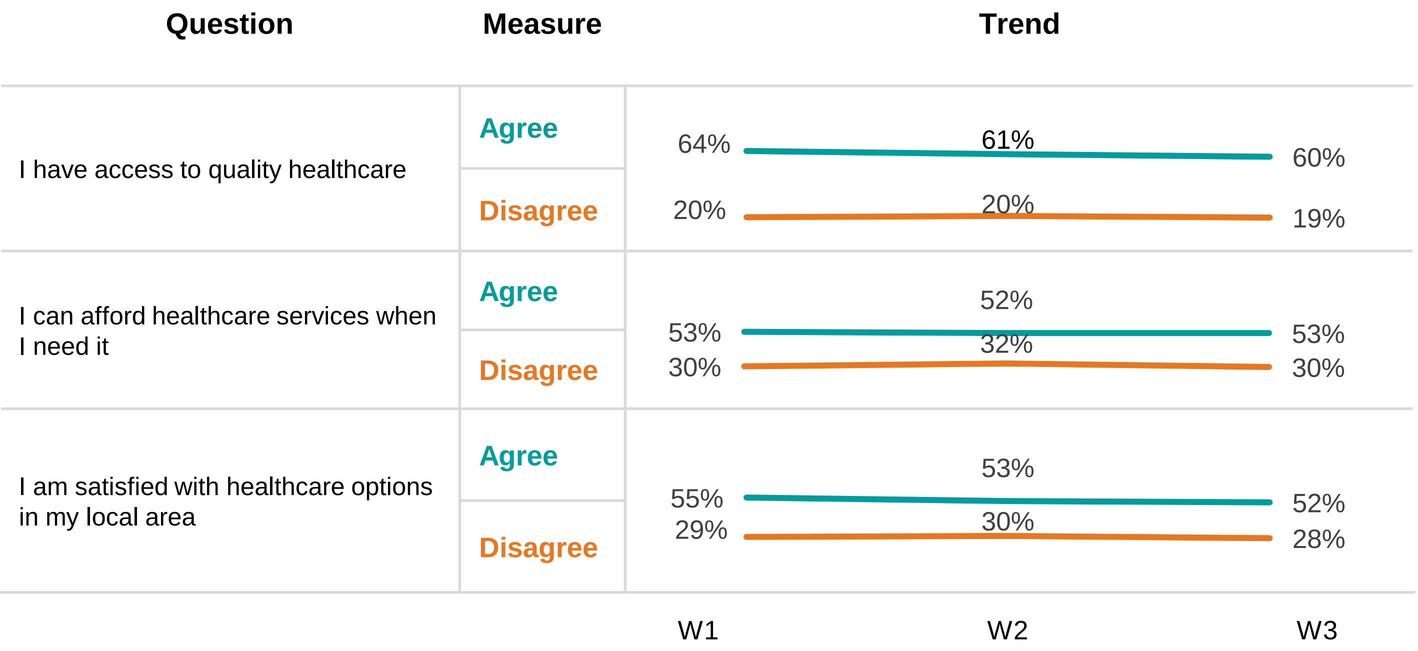
▲▼ Significantly higher/lower than total @ 95% CI

Q1. From the following list, please select the top three most important issues facing you or your household at the moment. Total sample, base n = 1,200 per wave.

Access to and satisfaction with healthcare remains steady

While three in five Queenslanders agree they have access to quality healthcare, this leaves one in five who disagree, and more in regional Queensland, who are also less likely to agree that their healthcare options are satisfactory or affordable.

Access to Healthcare



Question	Measure	Trend		
		W1	W2	W3
I have access to quality healthcare	Agree	64%	61%	60%
	Disagree	20%	20%	19%
I can afford healthcare services when I need it	Agree	53%	52%	53%
	Disagree	30%	32%	30%
I am satisfied with healthcare options in my local area	Agree	55%	53%	52%
	Disagree	29%	30%	28%

Wave 3: Agree
Access to healthcare
50+ years – 65%▲
ROQ (Wide Bay, Central Qld) – 53%▼ (46%▼, 41%▼)

Healthcare affordability
ROQ – 49%▼
Low income – 42%▼

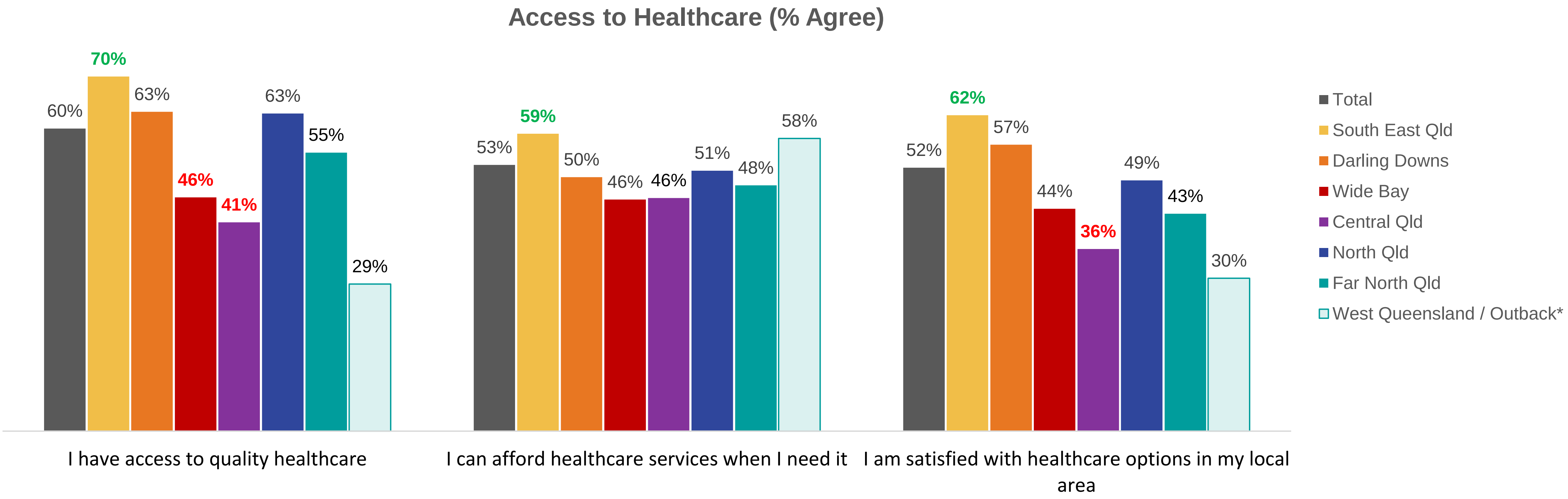
Satisfaction with healthcare options
ROQ (Central Qld) – 45%▼ (36%▼)

▲▼ Significantly higher/lower than total @ 95% CI

Q28 Please indicate to what extent do you agree or disagree with the following statements. Total sample, base n = 1,200 per wave.

Central Queenslanders remain less satisfied with their access to quality healthcare in their local area

SEQ is consistently more satisfied with their accessibility and affordability of healthcare.



%% Significantly higher/lower than total @ 95% CI

Q28 Please indicate to what extent do you agree or disagree with the following statements. Total wave 3 sample, base n = 1200. *Low base n=22

Access to GPs remains the most important issue facing the healthcare system

And there is an increasing concern around elective surgery wait times, driven by older Queenslanders. Access to maternity services remains a higher concern amongst those living in Central Queensland, as well as First Nations peoples and younger Queenslanders.

Most important issues facing the healthcare system

% Selected (max 3)	Wave 1 Total*	Wave 2 Total	Wave 3 Total
Access to a GP when I need one	24%	55%	50%
Out of pocket medical expenses	25%	51%	49%
Emergency department wait times	10%	39%	40%
Enough medical workers in your area/ hospital	10%	35%	31%
Elective surgery wait times	5%	19%	23%
Access to an outpatients specialist appointment	4%	15%	18%
Number of hospital beds	3%	17%	18%
Access to mental health facilities	6%	20%	16%
Access to an ambulance	3%	15%	16%
Health support in the home	2%	8%	8%
Access to maternity services	1%	5%	4%
Don’t know	5%	2%	3%

Wave 3:
Elective surgery wait times
50+ years – 28%▲

Access to mental health facilities
18-49 years – 21%▲
Parents living with children – 22%▲
First Nations – 40%▲

Access to an ambulance
SEQ – 21%▲

Access to maternity services
18-49 years – 8%▲
Central Qld – 11%▲
First Nations – 15%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q29 Below are some issues facing the health care system. Please select up to three items that are most important to you. Total sample, base n = 1,200 per wave. *Note: Question response code changed in Wave 2 from choose 1 (Wave 1) to choose max 3 (Wave 2). No sig testing conducted.

SUPPORT FOR VOICE TO PARLIAMENT REMAINS DOWN

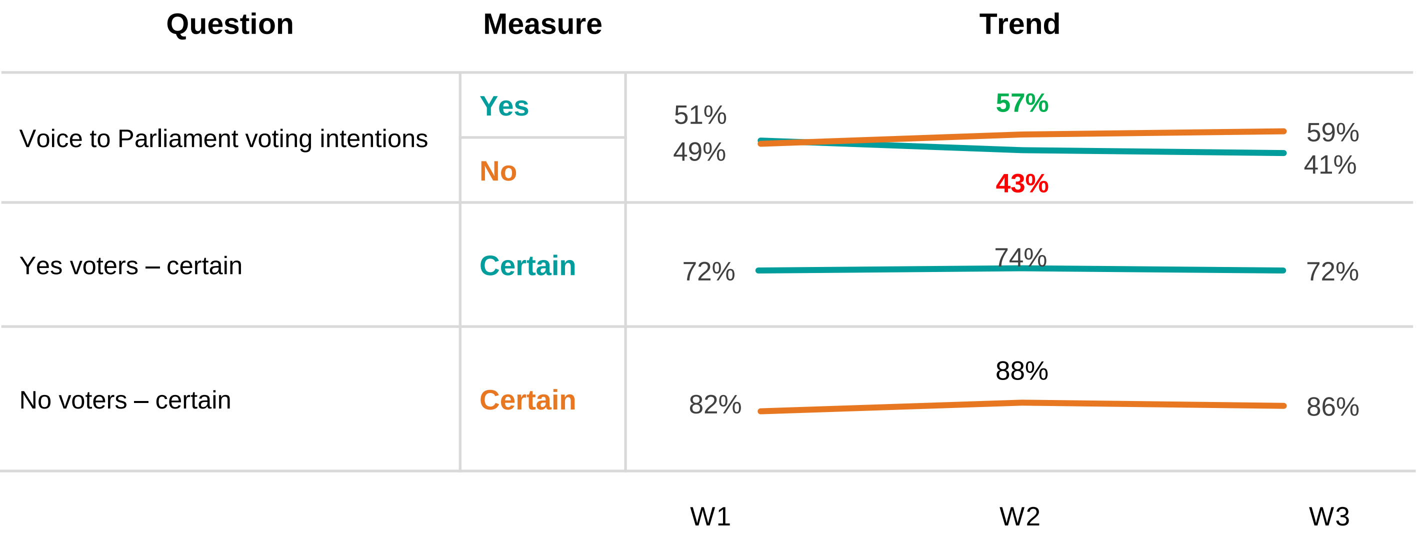
7

Support for Voice to Parliament continues it’s downward trend

With the announcement of the Voice to Parliament referendum to be held on the 14th October, voter intentions are continuing to trend downwards, with a stronger ‘no’ vote in regional Queensland (particularly Wide Bay). This trend is consistent with national polls, with the latest August 2023 polls showing ‘no’ votes higher than ‘yes’ (Essential 42% ‘yes’, 48% no; Newspoll 38% ‘yes’, 53% ‘no’)

‘No’ voters are more likely to be certain than ‘yes’ voters. This reduction in ‘yes’ votes is seen across gender and age, although younger Queenslanders, females, parents, First Nations Peoples and CALD Queenslanders remain more likely to vote ‘yes’.

Voice to Parliament voting intentions and certainty



Yes, in support
18-49 years – 52%▲
Female – 45%▲
ROQ (Wide Bay) – 37%▼ (28%▼)
Parents living with children – 46%▲
First Nations – 68%▲
CALD – 62%▲

Voting No – Very certain
Age 50+ – 77%▲

▲▼ Significantly higher/lower than total @ 95% CI

Q11. It is compulsory for Australian citizens to vote “yes” or “no” in a referendum. Even if it’s a leaning at the moment, how do you currently plan to vote? Total sample, base n = 1,200 per wave. Q12. How certain or uncertain do you feel about your decision to vote {decision} in the referendum? Wave 1/2/3 Yes, in support n=632/553/478, No, not in support n=568/647/722.

APPENDIX

8

Upcoming dates

	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9	Wave 10
Questionnaire approval	~~4 Aug~~	**15 Sep**	27 Oct	8 Dec	2 Feb	15 Mar	26 Apr	7 Jun
Scripting & testing	~~7 – 11 Aug~~	**18-22 Sep**	30 Oct - 3 Nov	11-15 Dec	5-9 Feb	18-22 Mar	29 Apr - 3 May	10-14 Jun
Fieldwork	~~14 – 25 Aug~~	**25 Sep – 6 Oct**	6-17 Nov	18 Dec 23 - 12 Jan 24	12-23 Feb	25 Mar - 5 Apr	6-17 May	17-28 Jun
Data processing	~~28 – 30 Aug~~	**9-13 Oct**	20-24 Nov	15-17 Jan	26-28 Feb	8-10 Apr	20-22 May	1-3 Jul
Full report	**13 Sep**	**25 Oct**	6 Dec	31 Jan	13 Mar	24 Apr	5 Jun	17 Jul
Presentation	14 Sep	**27 Oct**	8 Dec	2 Feb	15 Mar	26 Apr	7 Jun	19 Jul

Demographics

Sample size n=1,200 per wave

Unweighted		Wave 1	Wave 2	Wave 3
Age	18-29	25%	25%	18%
	30-49	30%	34%	39%
	50+	45%	42%	43%
Gender	Male	42%	39%	47%
	Female	58%	61%	53%
Region	SEQ	43%	38%	39%
	ROQ	57%	62%	61%
Region 2	South East Qld	43%	38%	39%
	Darling Downs	13%	11%	12%
	Wide Bay	14%	11%	12%
	Central Qld	8%	11%	11%
	North Qld	14%	14%	13%
	Far North Qld	8%	13%	12%
	West Queensland / Outback	1%	2%	2%

Weighted		Wave 1	Wave 2	Wave 3
Parents	Parents living with children	35%	35%	37%
	Other	65%	65%	63%
Employment	Employed	56%	56%	58%
	Studying	3%	3%	3%
	Retired	22%	23%	21%
	Others	19%	18%	18%
Education	Year 12 or below	34%	30%	33%
	Advanced education	66%	70%	67%
Household income	Low income (<$51,999)	35%	33%	34%
	$52,000 - $207,999	53%	55%	53%
	$208,000+	6%	6%	6%
	Refused	6%	6%	8%
First Nations	Yes	4%	4%	5%
	No	95%	95%	93%
	Prefer not to say	1%	1%	2%
CALD	Yes	6%	7%	7%
	No	93%	92%	92%
	Prefer not to say	1%	1%	1%

🟩 🟥 Significantly higher / lower than previous wave – 95% CI.

Questionnaire

1. Screener Questions

SQ1 Which of the following best describes how you think of yourself?

Q2 What is your date of birth?

Q3 And what is the postcode where you live?

SQ4 Which of the following best describes your household?

SQ5. You mentioned that you live with your child(ren). How old are they? *Please select all ages that apply.*

[validation question] SQ6. The following question is to verify that you are a real person. Please select the image displaying a traffic light.

2. General Perceptions of Queensland

Q1 From the following list, please select the top three most important issues facing you or your household at the moment.

Q2 How satisfied or dissatisfied are you with the Queensland State Government’s performance in each of the following areas?

Q42 In general, how optimistic or pessimistic are you about the future of:

~~**Q3** To what extent do you agree or disagree that Queensland is headed in the right direction?~~

3. Cost of Living

Q4 How concerned are you about the rising cost of living?

Q5 Below is a list of issues that are impacted by the rising costs of living. Which three of the following issues affect you the most?

Q39. Please select up to three items from the following list that you believe has contributed the most to the rising cost of living.

Q43 When it comes to easing the cost of living, which level of government do you believe has most responsibility for providing assistance for:

Q44 Please rate the extent to which you agree or disagree with the following statements:

Q46 Have you sought government assistance to respond to cost-of-living pressures within the last 12 months?

4. Housing

Q6 How do you feel about your current housing situation?

Q7 Whether you have a mortgage or are paying for a private rental, which statement best applies to you?

Q40. Please select up to three items from the following list that you believe has contributed the most to the housing shortage.

5. Finances and Economy

Q8 Do you think your personal financial circumstances have gotten better, worse or stayed the same, compared to this time last year?

Q41. Are you aware of the Queensland government $550 cost of living energy rebate announced in the recent state budget?

6. Education

Q9 Please indicate to what extent do you agree or disagree with the following statements.

- **9.1** My family and/or I have access to affordable, high-quality education
- **9.2** I have access to development and training opportunities in my local area
- **9.3** I am satisfied with education options in my local area
- **9.4** Training and development opportunities in my local area have helped me get a job or improve my employment status
- **9.5** Training and development opportunities in my local area are relevant to the jobs available nearby

7. First Nations

~~**Q10** To the best of your knowledge, what does an Indigenous Voice to parliament mean?~~

Q11 …It is compulsory for Australian citizens to vote “yes” or “no” in a referendum. Even if it’s a leaning at the moment, how do you currently plan to vote?

Q12 How certain or uncertain do you feel about your decision to vote [yes/no] in the referendum?

Questionnaire

8. Crime and Safety

Q13 Please indicate your top three primary sources for information on safety and crime?

Q14 In the past 12 months, have you, or someone in your household, been a victim of crime in your community?

Q15 How satisfied or dissatisfied are you with the way in which local crime and anti-social behaviour are dealt with by…

Q16 Please indicate to what extent do you agree or disagree with the following statements.

- **16.1** I generally feel safe in my community
- **16.2** Crime is an issue in my community
- **16.3** I feel safe going out at night in my community
- **16.4** I am confident I know what to look out for to avoid being a victim of online scams or fraud

Q17 Reflecting on the last 12 months, please indicate whether you think each of the following has increased or decreased in your community:

Q18 What demographic do you believe is most commonly associated with criminal activity in your community?

Q19 What type of crime do you feel is more of a problem in your community?

Q20 Thinking about the reasons that may cause people to commit crimes, what do you think is the most common reason?

~~9. Energy and Environment~~

~~**Q21** To what extent are you concerned about the impact of climate change on the future of Queensland?~~

~~**Q22** Please rate how responsible you think each group below is for leading a reduction in carbon emissions.~~

~~**Q23** Renewable energy is produced using natural resources that are constantly replaced and never run out (e.g., solar power, wind power, hydropower, battery technology).~~

~~**Q24** Please indicate to what extent do you agree or disagree with the following statements.~~

- ~~**24.1** I support the Queensland Government's renewable energy target of 70% by 2032 and 80% by 2035.~~
- ~~**24.2** I support the Queensland Government's approach to charging mining companies more when commodity prices are higher.~~
- ~~**24.3** I believe that renewable energy sources (e.g., wind, solar, hydrogen) will reduce electricity bills in the future.~~
- ~~**24.4** I believe there are economic benefits in taking up renewable energy.~~

~~**Q25** Some people try to reduce their impact on climate change by making changes to their lifestyle or the goods and services they purchase. For each, please indicate whether you have done this, are considering this, or are not going to do this.~~

10. Planning for the Future

Q26 Please indicate to what extent do you agree or disagree with the following statements.

- **26.1** The Olympics are a good idea for Brisbane
- **26.2** Queensland's population is growing. To plan for this growth, we require more infrastructure to support this growth.
- **26.3** By planning well, we can ensure the community has the infrastructure and services it needs to maintain Queensland's great lifestyle.
- **26.4** To ensure everyone has access to housing, we need to re-think the type of housing and the block sizes we live on.
- **26.5** Infrastructure is being delivered at the pace needed to keep up with Queensland's growth.
- **26.6** Growth is good for me and my local community.
- **26.7** To improve local infrastructure, we accept there will be short term disruption and inconvenience.

Questionnaire

11. Health and Wellbeing

Q27 How satisfied or dissatisfied are you with the following aspects of your personal life?

Q28 Please indicate to what extent do you agree or disagree with the following statements.

- **28.1** I have access to quality healthcare
- **28.2** I can afford healthcare services when I need it
- **28.3** I am satisfied with healthcare options in my local area

Q29 Below are some issues facing the health care system. Please select up to three items that are most important to you.

Q30 In the past 12 months, have you or an immediate family member attended a Queensland public hospital emergency department for medical care/treatment?

Q31 What was your main reason for attending a Queensland public hospital emergency department for medical care/treatment?

Q32 Overall, how would you rate the care you received?

Q33 How many times in the past twelve (12) months did you visit a GP, clinic, or other health care place, other than an Emergency Department, to get medical care or advice about your health?

12. Demographics

Q34 Which of these best describes your employment status? Please select the one that best describes your situation.

Q35 What is the highest level of education that you have completed?

Q36 What is your approximate annual household income before tax? That is, the combined income of all members of your household

Q37 Do you identify as a person of Aboriginal or Torres Strait Islander descent?

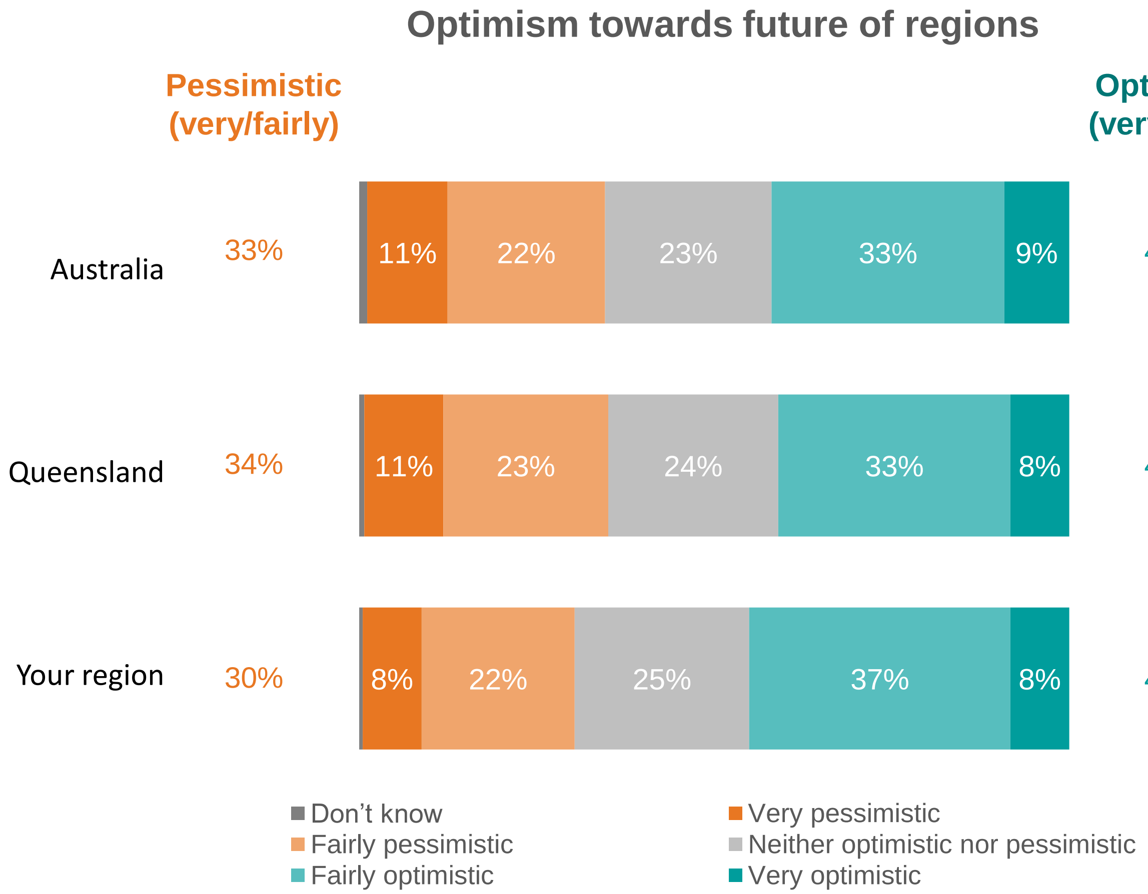
Q38 Do you speak a language other than English at home?

Q45 Do you have any other comments about the survey?

Question changes per wave

Wave	Added	Changed / updated	Removed
2	SQ6, Q39, Q40, Q41	Q33 (added code 0) Q9 (added codes 4 & 5, updated logic)	Q10
3	Q42, Q43, Q44, Q45, Q46		Q3, Q21-25, Q30-33

Optimism towards future of regions



▲▼ Significantly higher/lower than total @ 95% CI

Q42. In general, how optimistic or pessimistic are you about the future of: Total wave 3 sample, base n = 1200. Note: no significant differences found between subgroups.

TRACKING – Safety and Crime information sources

Top 3 sources for information on safety and crime

% Selected (max 3)	Wave 1 Total	Wave 2 Total	Wave 3 Total
Television news	62%	62%	61%
Social media (Facebook, Instagram, Twitter, TikTok)	45%	48%	47%
Word of mouth/information from other people	35%	36%	34%
Radio news	32%	28%	25%
The police or police operated website/social media	22%	24%	25%
Other internet news source	21%	20%	20%
Local newspapers	18%	19%	19%
Personal experience	16%	16%	17%
Metro/national newspapers	10%	9%	11%
Talkback radio	7%	8%	6%
Don't know	2%	1%	2%
None of these	2%	2%	2%
Other	2%	1%	1%

Across waves 1-3, top two channels:

Television news
50+ years – 79%▲
Males – 67%▲
Wide Bay – 75%▲
Low income – 69%▲
Parents living with children – 54%▼
First Nations– 49%▼
CALD – 53%▼

Social media
18-49 years – 62%▲
Females – 59%▲
ROQ (Central Qld, Outback) – 49%▲ (61%▲,74%▲)
Parents living with children – 58%▲
Low income – 50%▼

▲▼ Significantly higher/lower than total @ 95% CI

Q13. Please indicate your top three primary sources for information on safety and crime? Total sample, base n = 1,200 per wave.

TRACKING – Perceptions of criminals

Top 3 reasons why people commit crime

Total % selected (max 3)	Wave 1	Wave 2	Wave 3
Lenient sentencing of criminals	54%	56%	55%
Lack of supervision of minors	48%	50%	49%
Drug use	50%	47%	46%
Poor parenting	44%	44%	45%
Breakdown of family	25%	28%	27%
Poverty	24%	21%	24%
Unemployment	16%	19%	18%
Poor/lack of education	18%	17%	17%
Underemployment	7%	6%	8%
Other	4%	5%	3%
Don’t know	3%	2%	2%
None of these	0%	0%	1%

Lenient sentencing
50+ years – 62%▲
First Nations – 20%▼

Drug use
Far North Qld – 24%▼

Poor parenting
Far North Qld – 64%▲

Lack of education
18-49 years – 23%▲
Low income – 11%▼

▲▼ Significantly higher/lower than total @ 95% CI

Q18. What demographic do you believe is most commonly associated with criminal activity in your community? Q20. Thinking about the reasons that may cause people to commit crimes, what do you think is the most common reason? Total sample, base n = 1,200 per wave.

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