

Nationwide Voter Research.

November 2024



Objectives & Summary Methodology.

Summary Survey Methodology

- The 10-minute online survey was fielded from **11-18 Nov 2024**, among n=1600 voters (18+) across Australia
 - With a sub-sample of n=622 in 7 key seats of: Bennelong, Fowler, Ryan, Tangney, Curtin, Menzies and Braddon
 - Margin of error on the total sample is +/-2.4% at the 95% confidence interval nationally
 - Margin of error on key seat subsample is +/-3.9%
 - Data representative of the voting population

Issue Agenda.

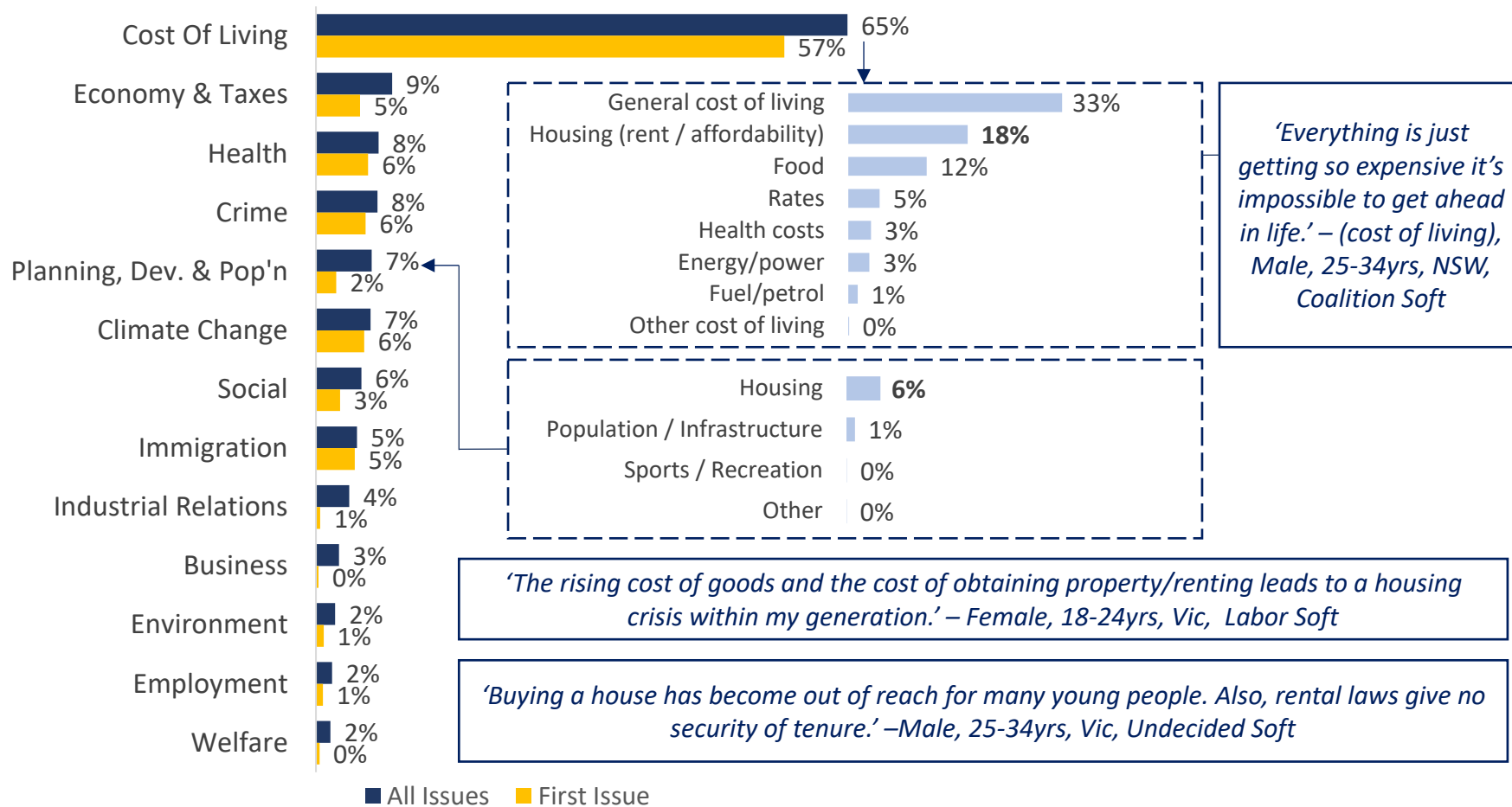
The logo graphic for Insightfully consists of four overlapping, semi-transparent grey triangles arranged in a diamond pattern, with their vertices pointing towards the center.

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Housing is the most common cost of living concern for Australian voters.

Spontaneous Issue Concerns



'Everything is just getting so expensive it's impossible to get ahead in life.' – (cost of living), Male, 25-34yrs, NSW, Coalition Soft

- Female 55-64-yrs, NSW, soft voter

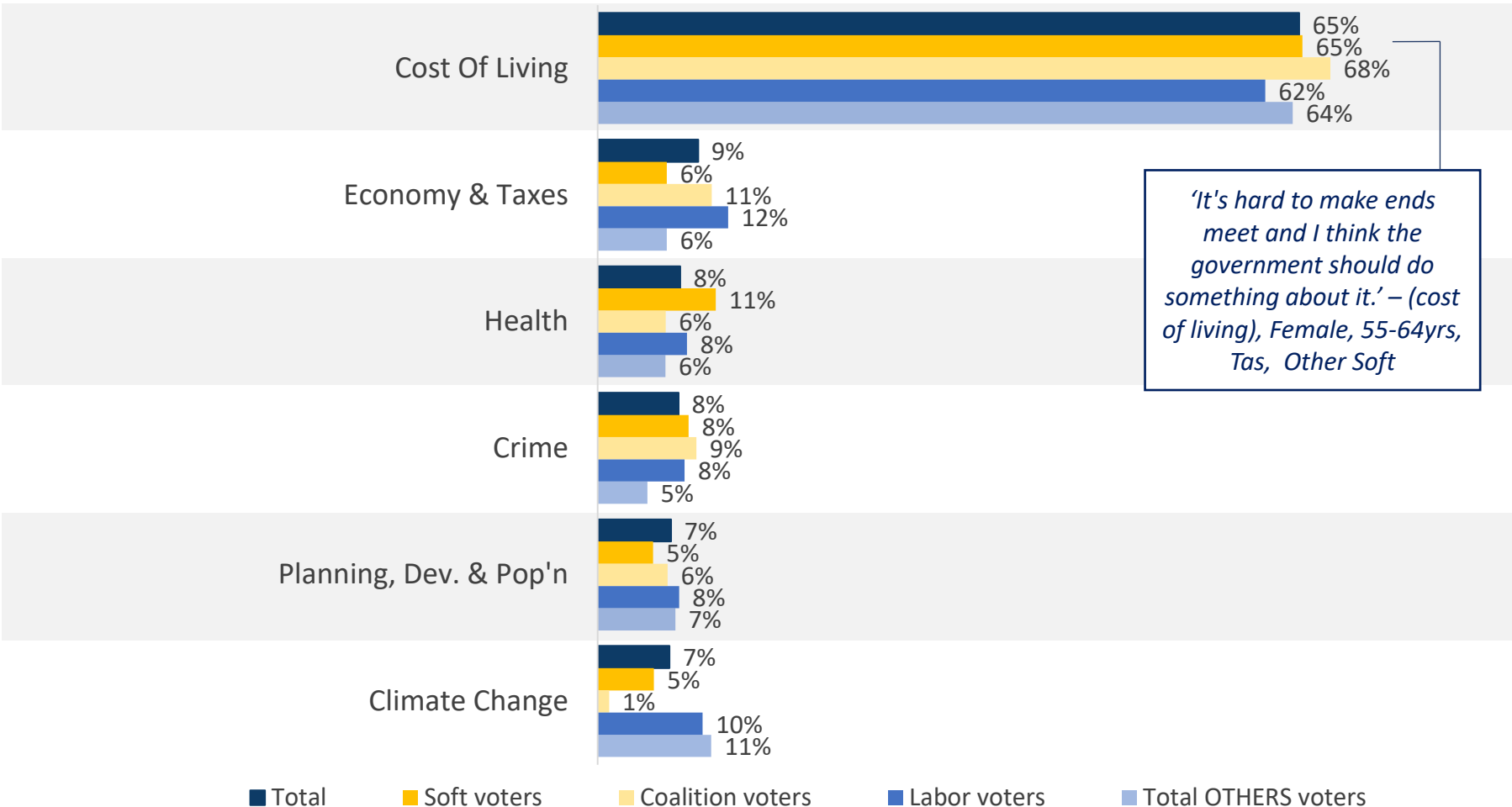
'The rising cost of goods and the cost of obtaining property/renting leads to a housing crisis within my generation.' – Female, 18-24yrs, Vic, Labor Soft

'Buying a house has become out of reach for many young people. Also, rental laws give no security of tenure.' –Male, 25-34yrs, Vic, Undecided Soft

Q6. What is the most important issue of concern to you and your family that you want your Federal Government representative to be doing something about? *N.B. All Issues <2% removed.*

A quarter of voters mention housing either in the context of costs or planning.

Spontaneous All Issue Concerns – By Vote (1/2)

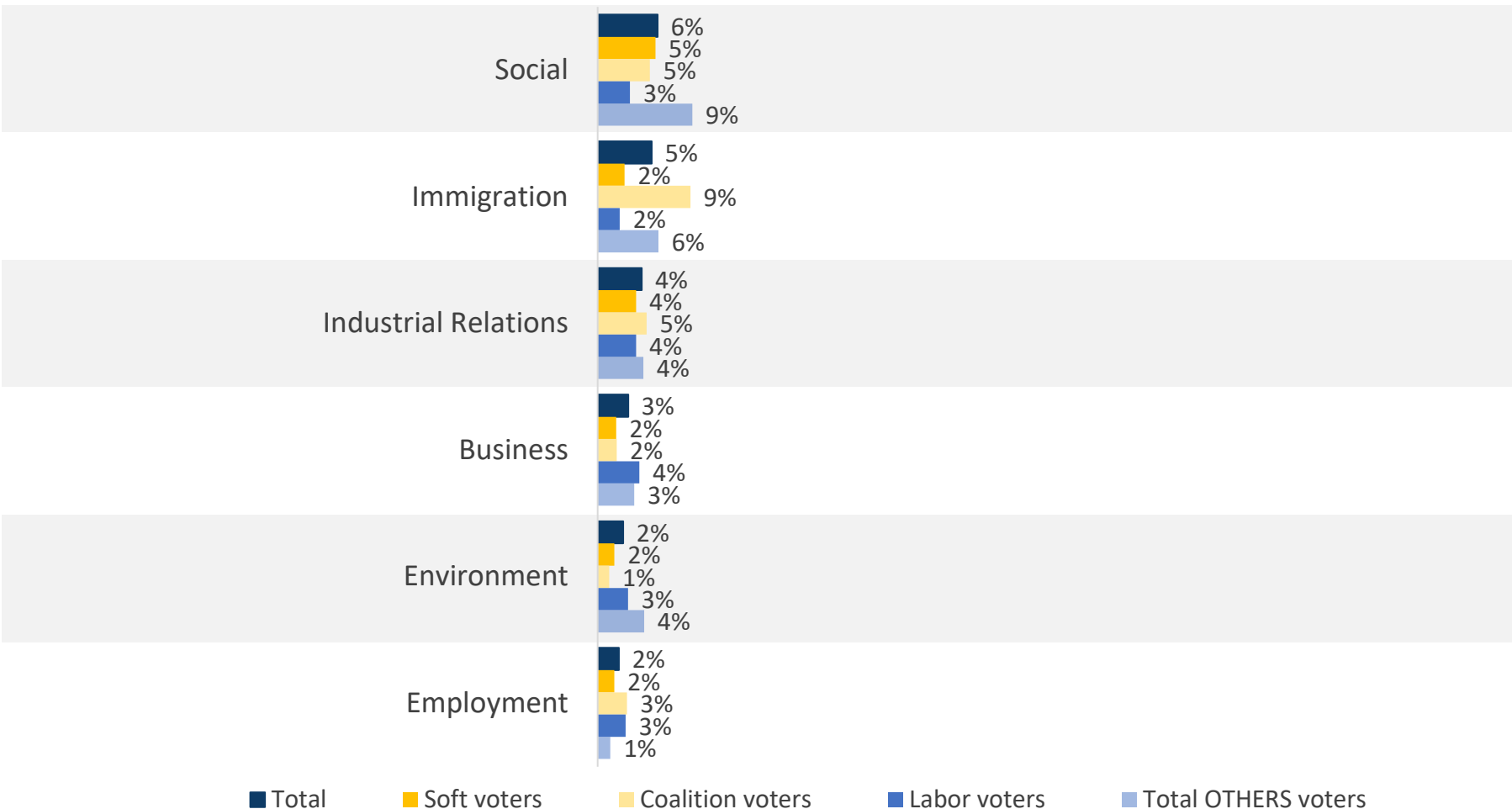


'It's hard to make ends meet and I think the government should do something about it.' – (cost of living), Female, 55-64yrs, Tas, Other Soft

Q6. What is the most important issue of concern to you and your family that you want your Federal Government representative to be doing something about? *N.B. All Issues <2% removed.*

Minor party and independent voters more concerned about social issues.

Spontaneous All Issue Concerns – By Vote (2/2)



Q6. What is the most important issue of concern to you and your family that you want your Federal Government representative to be doing something about? *N.B. All Issues <2% removed.*

Indicative Quotes.

Cost of Living	Housing
<p><i>'Affects everything and everyone we love and care about and especially people doing it tougher than we are.'</i> Female, 65+yrs, QLD, Coalition Soft voter</p>	<p><i>'Because housing costs are getting out of control, and not enough houses are getting built.'</i> Male 25-34yrs, QLD, Labor Hard voter</p>
<p><i>'It's getting harder for the average Australian to afford the basic needs to live a happy life without the stress of having no money left.'</i> Female 55-64yrs, NSW, Labor Hard voter</p>	<p><i>'People are unable to find a place to live. Rents are so high people either can't afford them or will never save up for their own home.'</i> Female 55-64yrs, QLD, Coalition Hard voter</p>
<p><i>'the basic essential items are just too expensive. Big companies have used inflation to increase well beyond what is reasonable.'</i> Male 45-54yrs, Vic, Labor Hard voter</p>	<p><i>'There are not enough homes in Australia which leads to high rents and then harder to balance my financial situation.'</i> Male 25-34yrs, NSW, Coalition Hard voter</p>
<p><i>'I think that the cost of energy is getting too expensive and we need more renewables but to be able to do it affordably.'</i> Male 25-34 yrs, Tas, Labor Hard voter</p>	<p><i>'As I am getting older the constant inflation and limited houses available makes it extremely difficult to rent or buy a home in the future.'</i> Female 18-24yrs, NSW, Coalition soft voter</p>
<p><i>'I have a good paying job and the government is making it harder to live by bringing in too much immigration.'</i> Male 25-34yrs, SA, Coalition Hard voter</p>	<p><i>'It does not impact me specifically but many of my friends and family. Many families are struggling to find suitable affordable housing.'</i> Female 35-44, WA, Liberal soft voter</p>

Q6. What is the most important issue of concern to you and your family that you want your Federal Government representative to be doing something about?

Housing Issues.

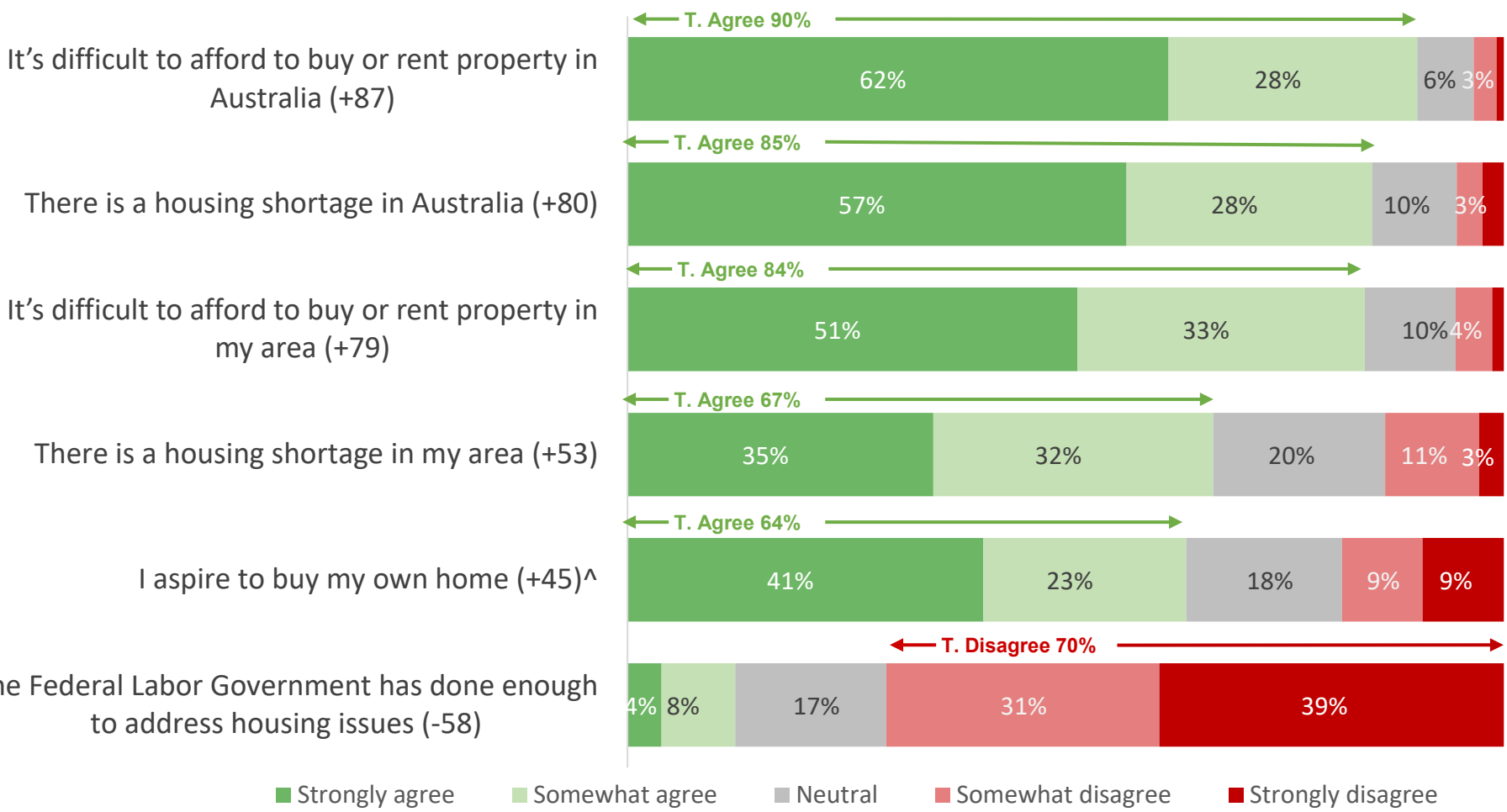
The logo graphic for Insightfully, consisting of several overlapping, semi-transparent grey rectangular shapes that form a stylized, abstract representation of the word 'Insightfully'.

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Data shows Australian voters do see a housing industry in crisis.

Housing Statements Summary

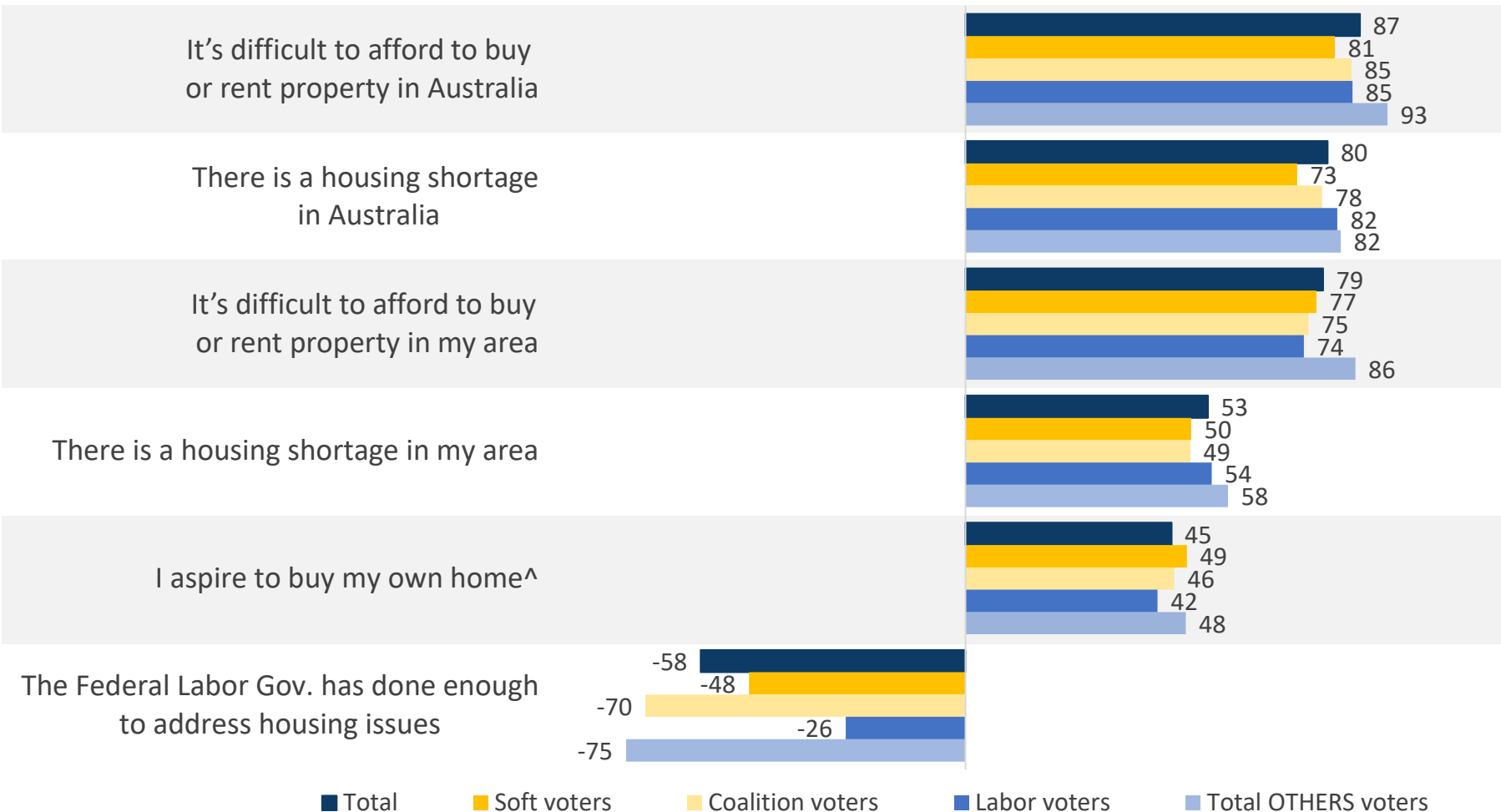


- Four in ten Aussie voters strongly disagree that the Labor Government have done enough to address the housing crisis
- Two-thirds of Australian voters who don't yet own a home (or mortgage) aspire to buy their own home; however, about one in six (18%) do not aspire to own their own home

Sorted by Net Agree (in brackets): % Total Agree - % Disagree
 Q8. To what extent do you agree or disagree with the following statements? N.B. ^ Base size n= 596 (non-homeowners Q5), labels <3% removed for clarity purposes

Sheet the blame home to Labor's failure to act to pull levers to address the crisis.

Housing Statements Net Agree – By Vote



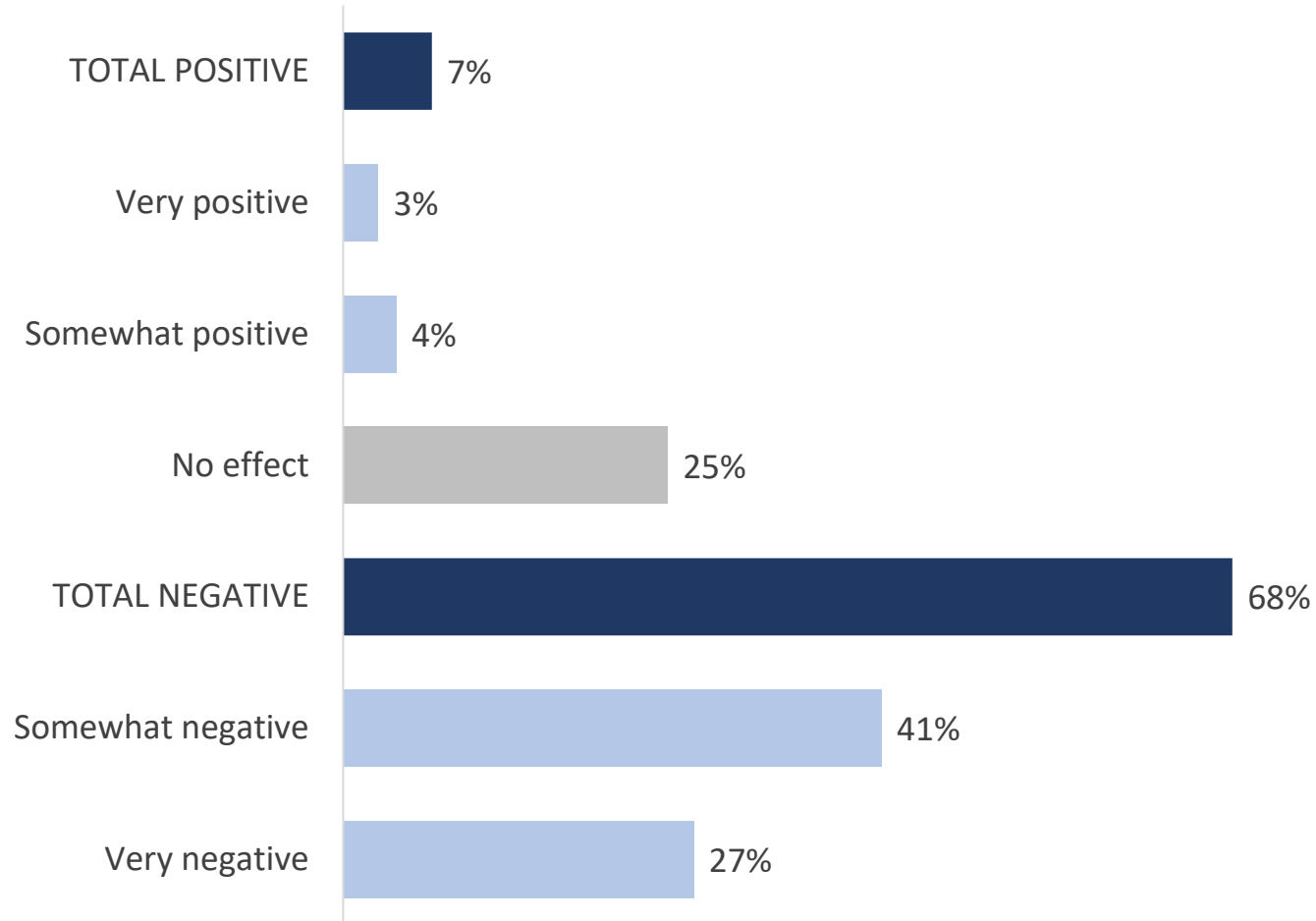
- Labor voters agree overall that the government has NOT done enough to address housing issues

Net Agree: % Total Agree - % Disagree

Q8. To what extent do you agree or disagree with the following statements? N.B. ^ Base size n= 596 (non-homeowners Q5)

Two-thirds of voters say the crisis is damaging the quality of life in their community.

Impact of Housing Situation on Community QoL

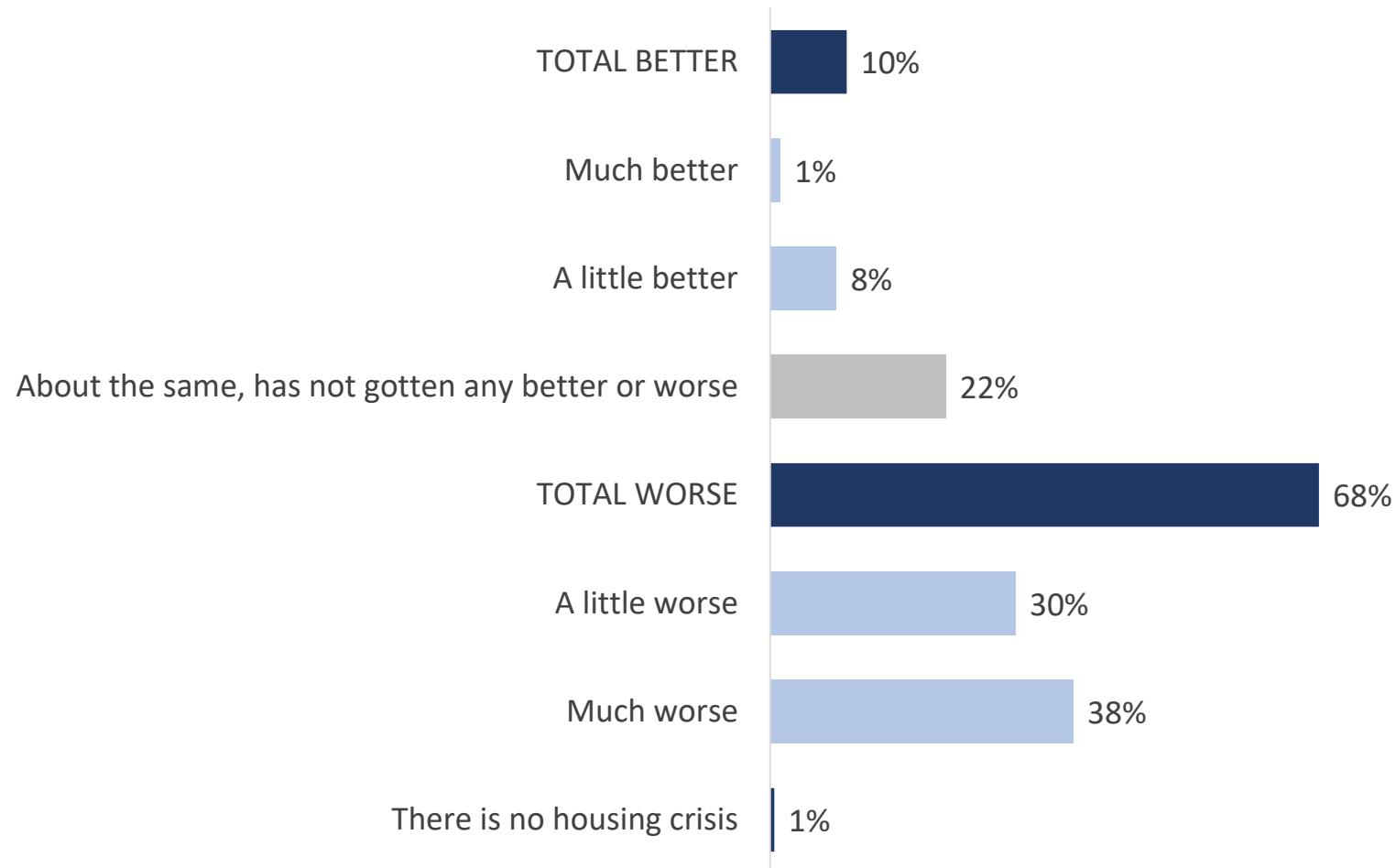


Q9. What kind of effect has Australia's housing situation had on the quality of life in your community?

N.B. Base size n=1425 (only those who have housing issues in their area)

More than two-thirds say the housing crisis has gotten worse over 12 months.

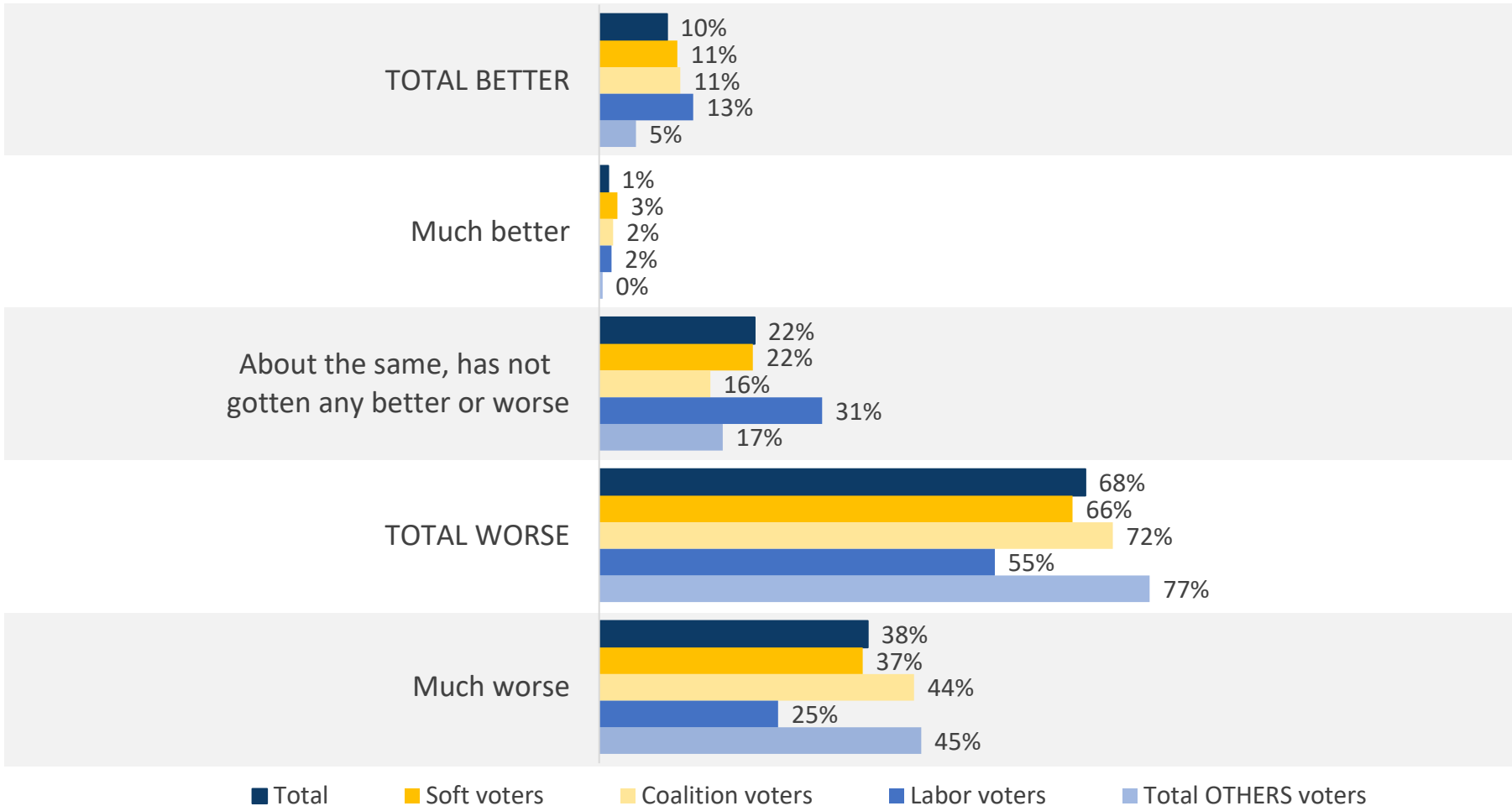
Housing Crisis Change in P12 Months



Q10. Over the past 12 months, do you think the housing crisis in Australia has gotten better or worse?

A majority of Labor voters say the crisis got worse over the past 12 months.

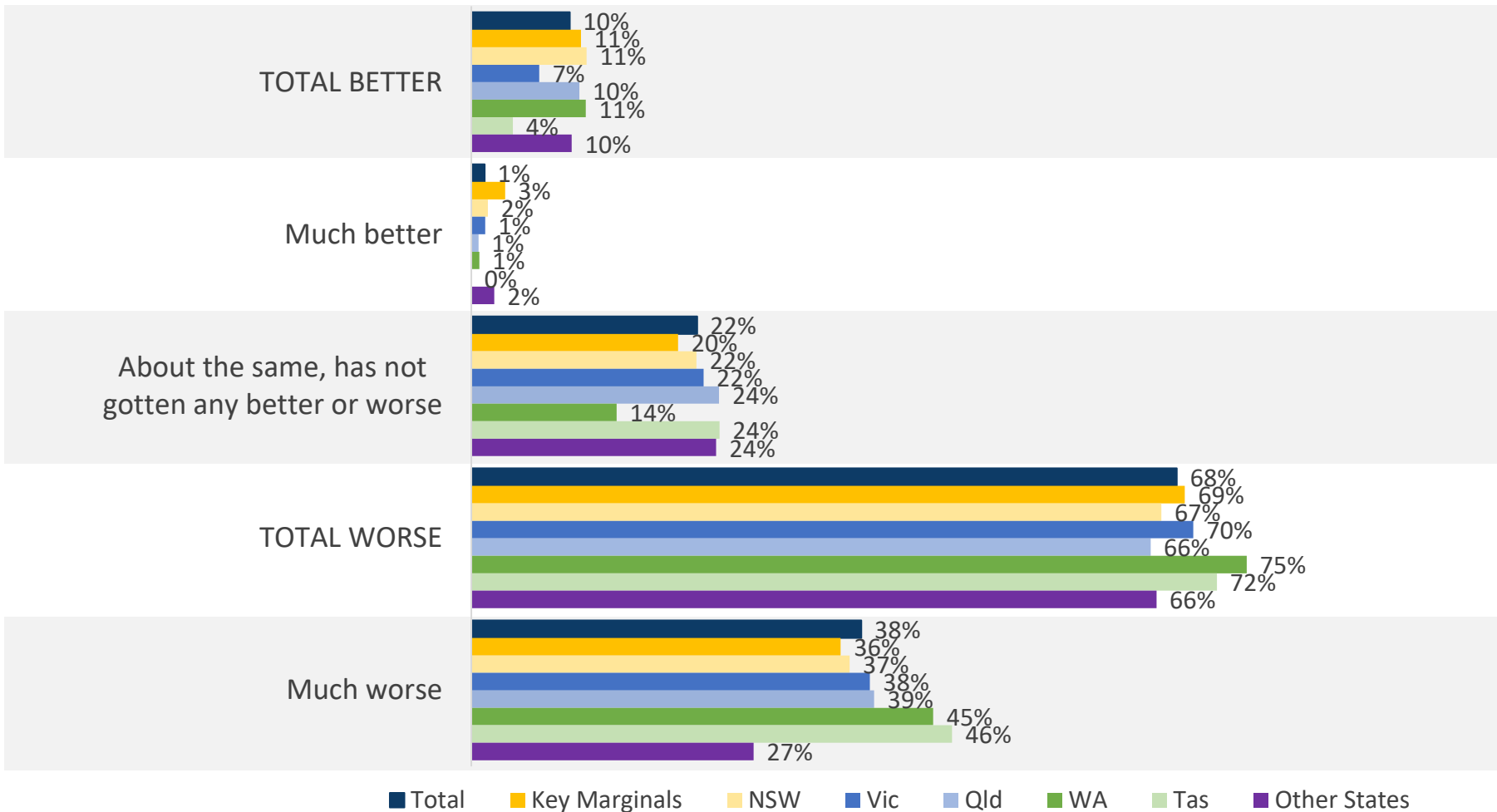
Housing Crisis Change in P12 Months – By Vote



Q10. Over the past 12 months, do you think the housing crisis in Australia has gotten better or worse?

Housing crisis got worse by Geographics.

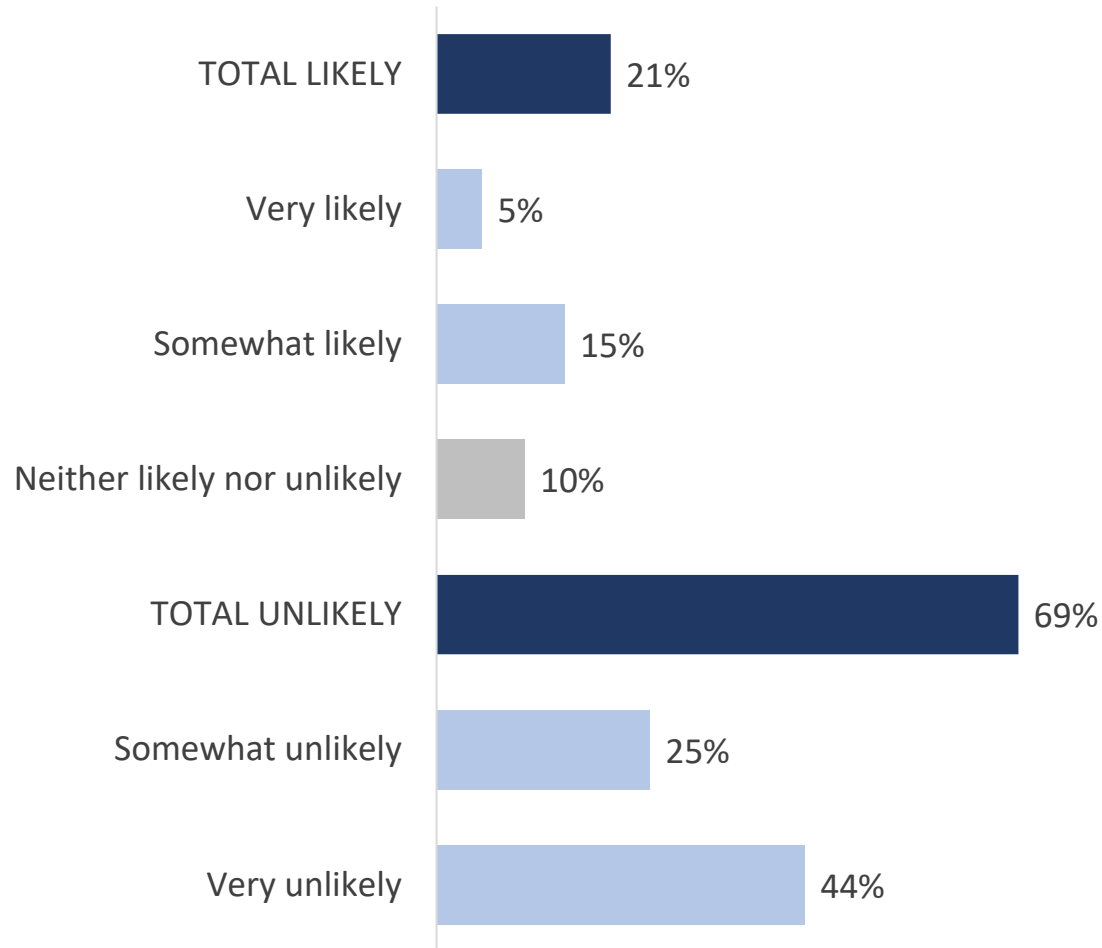
Housing Crisis Change in P12 Months – By Geographics



Q10. Over the past 12 months, do you think the housing crisis in Australia has gotten better or worse?

Seven out of 10 who want to buy a home fear they can't achieve it within 5 years.

Likelihood of Purchasing Home Next 5 Years

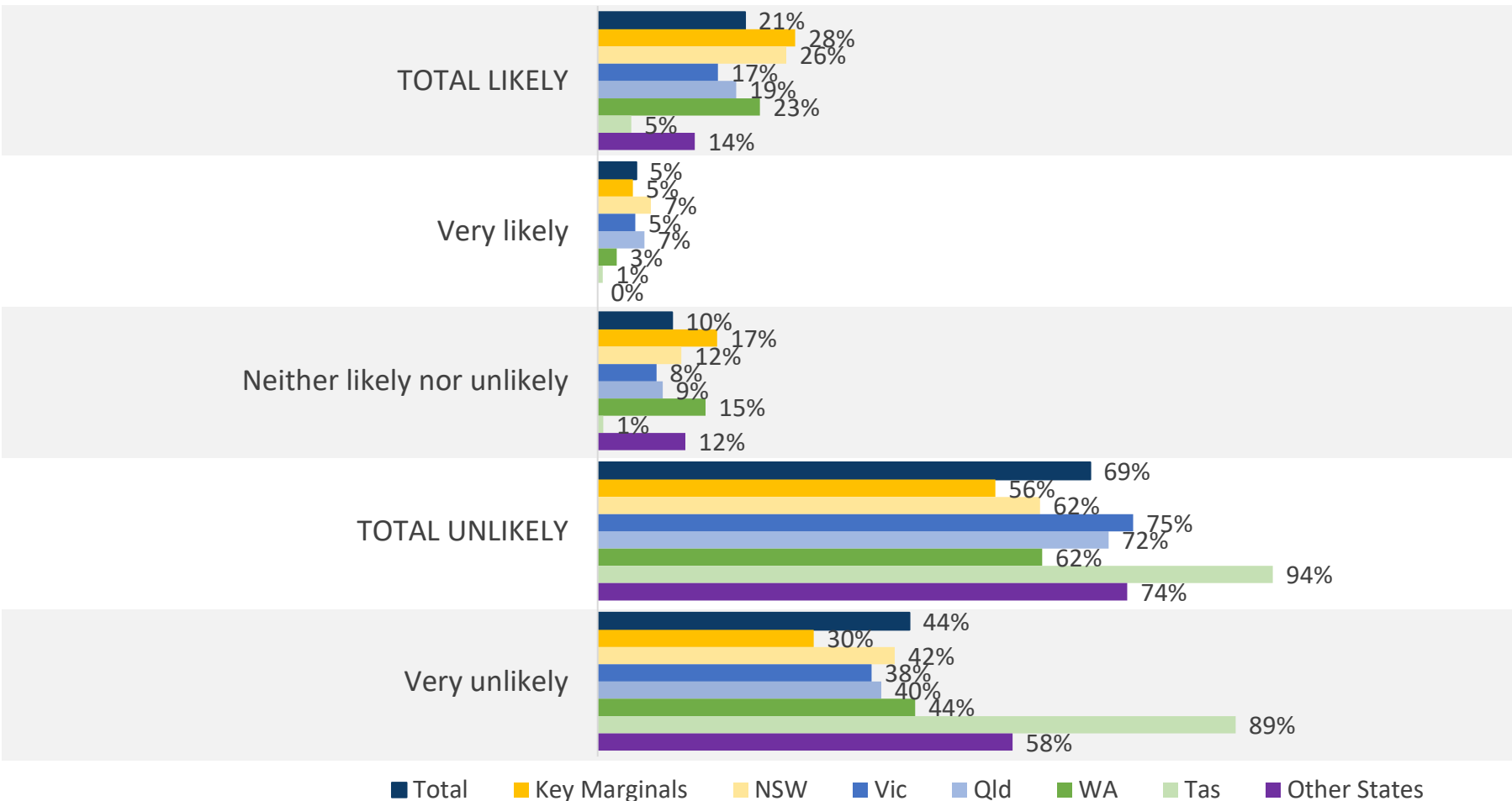


Q11. You said you aspire to buy your own home. How likely is it that you'll be able to achieve that in the next 5 years?

N.B. Base size n=408 (Only those who aspire to own a home, codes 1-2 'I aspire to buy my own home')

Nine out of 10 aspiring Tas buyers fear they can't afford a home in the next 5 yrs.

Likelihood of Purchasing Home Next 5 Years – By Geographics

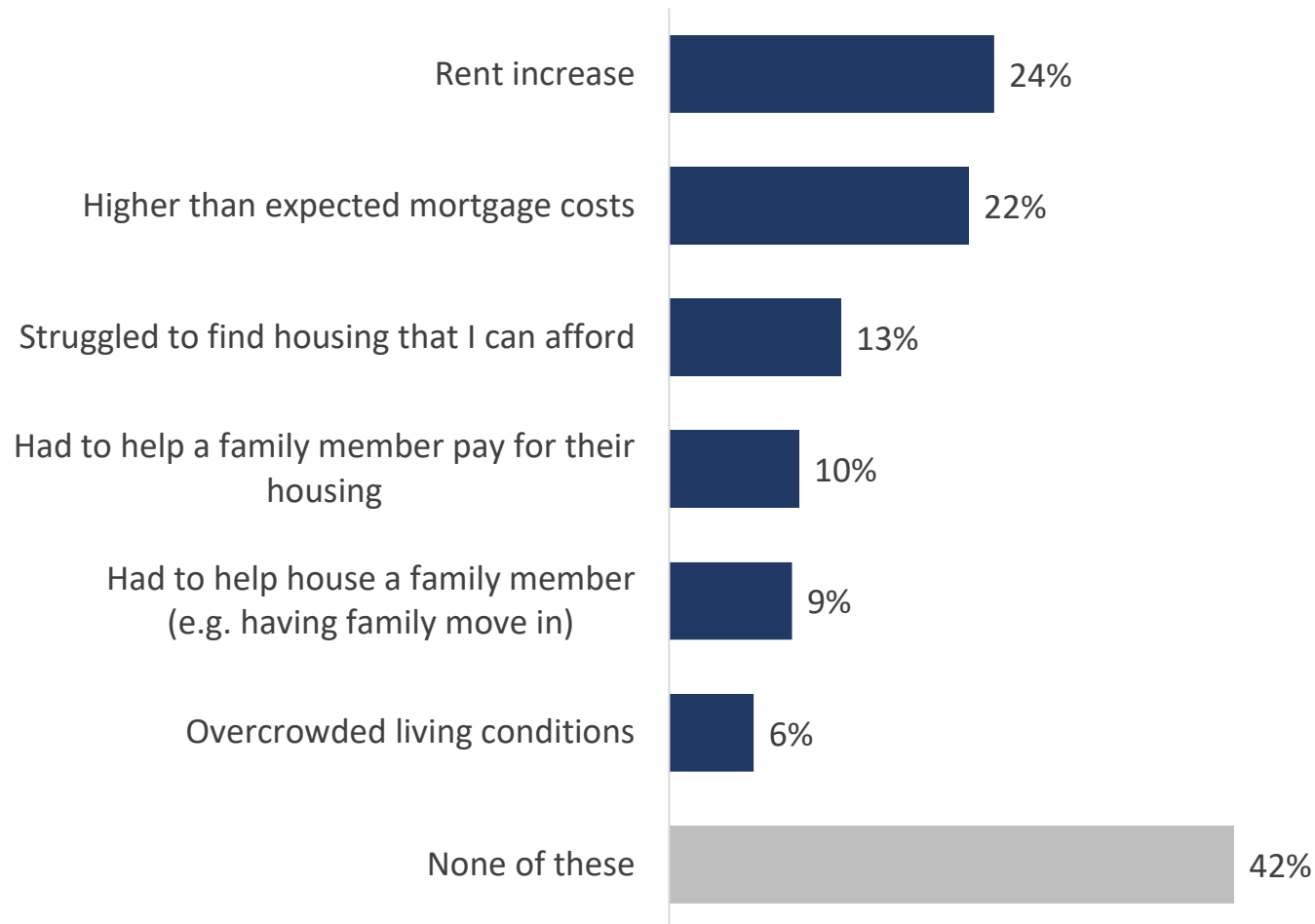


Q11. You said you aspire to buy your own home. How likely is it that you'll be able to achieve that in the next 5 years?

N.B. Base size n=408 (Only those who aspire to own a home, codes 1-2 'I aspire to buy my own home')

More than two in 10 were hit with rent or unexpected mortgage rises in the past year.

Housing Impact P12 Months

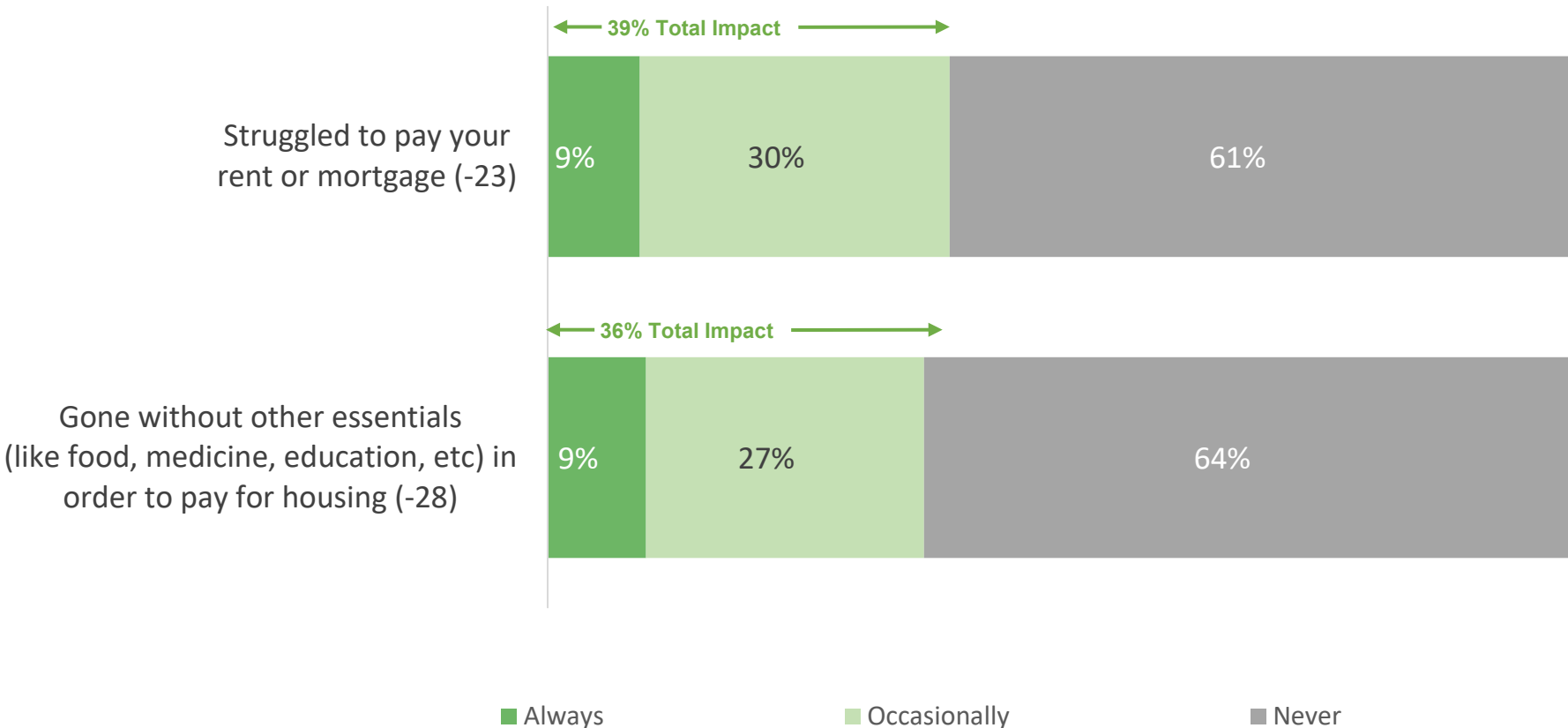


Q13. In the past 12 months, have you personally experienced any of the following?

- Around 10% of Australian voters over the past twelve months:
 - Struggled to find housing they could afford;
 - Has to help a family member pay for their housing; and/or
 - Had to have a family member move in with them.

More than a third have struggled to pay housing costs and foregone essentials.

Housing Impact Frequency



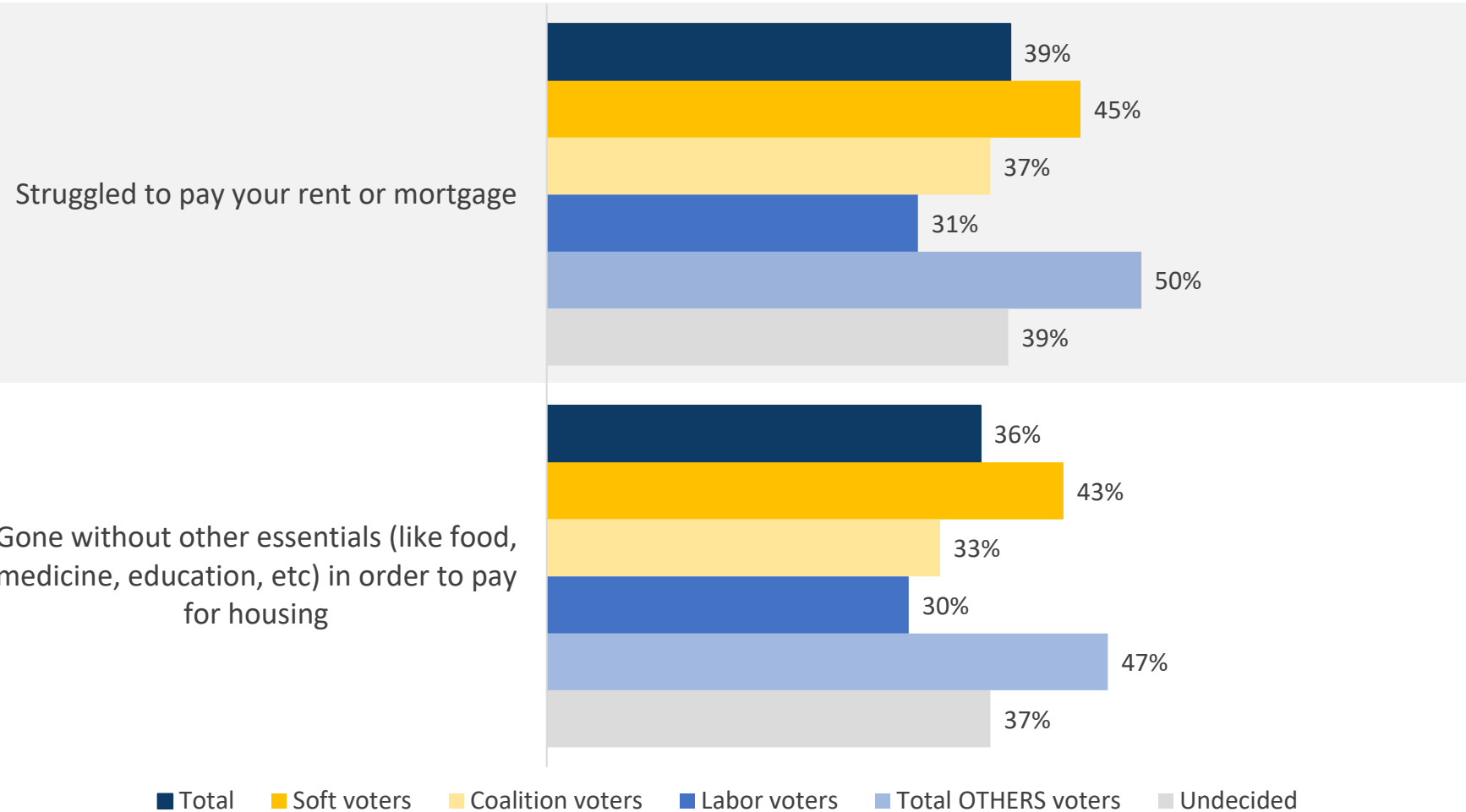
Sorted by Net Impact (in brackets): % Total Impact - % Never

Q14. In the past 12 months, how often have you personally experienced any of the following?

- Almost four in 10 Australian voters have struggled to pay their rent or mortgage
- One in three Australians have gone without essentials to pay for housing
- Nearly one in 10 Australian voters always struggle to pay their rent or mortgage
- And the same number always have to forego essentials like food, medicine, education or other needs so they can pay for their housing

More than two-fifths of soft voters are foregoing essentials to pay for housing.

Housing % Total Impact – By Vote



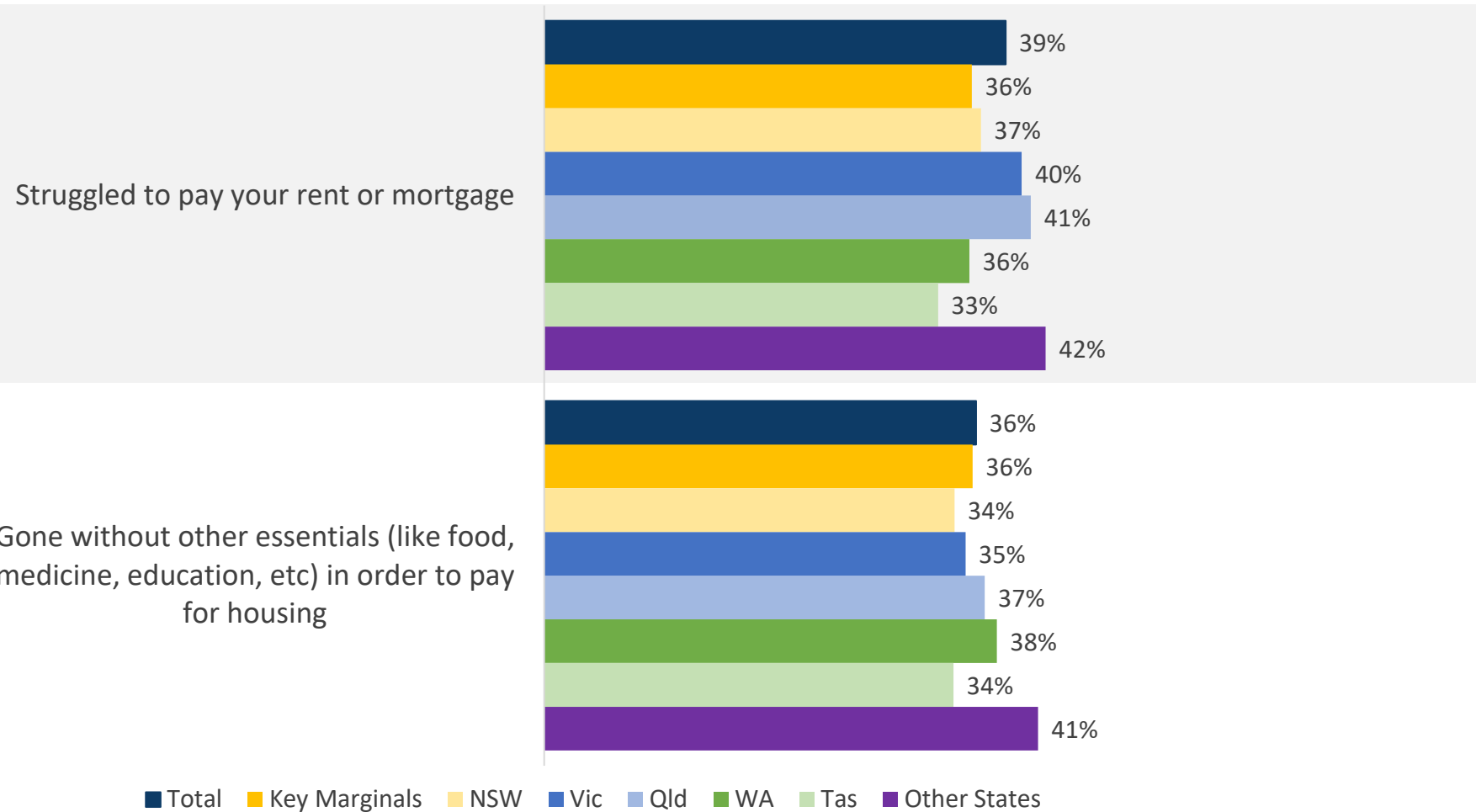
% Total Impact: % Always + % Occasionally

Q14. In the past 12 months, how often have you personally experienced any of the following?

- 43% of soft voters are always or occasionally going without essentials like food, medicine, education and other things so they can meet housing costs

Voters in all states and key marginals are missing out on essentials to afford housing.

Housing % Total Impact – By Geographics

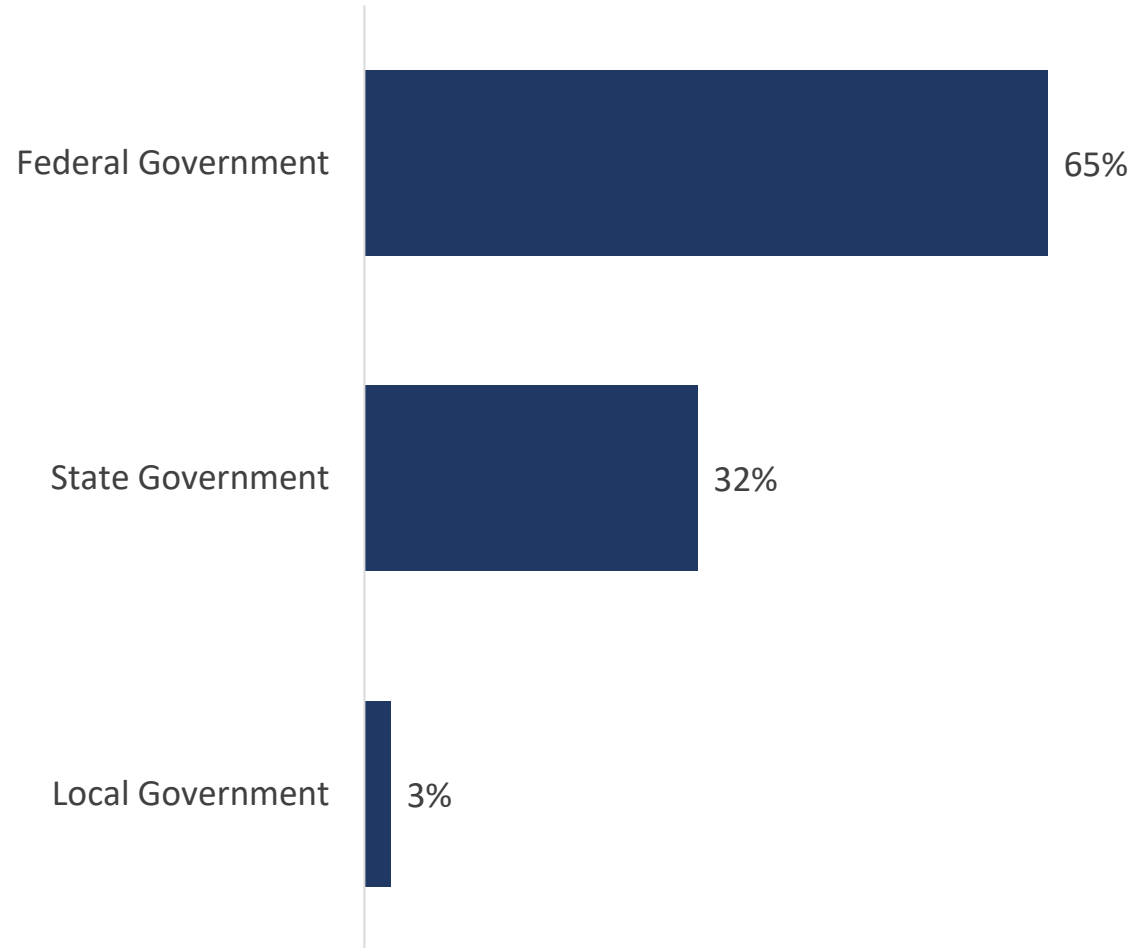


% Total Impact: % Always + % Occasionally

Q14. In the past 12 months, how often have you personally experienced any of the following?

Voters say the Fed Govt has the lion's share of responsibility for housing issues.

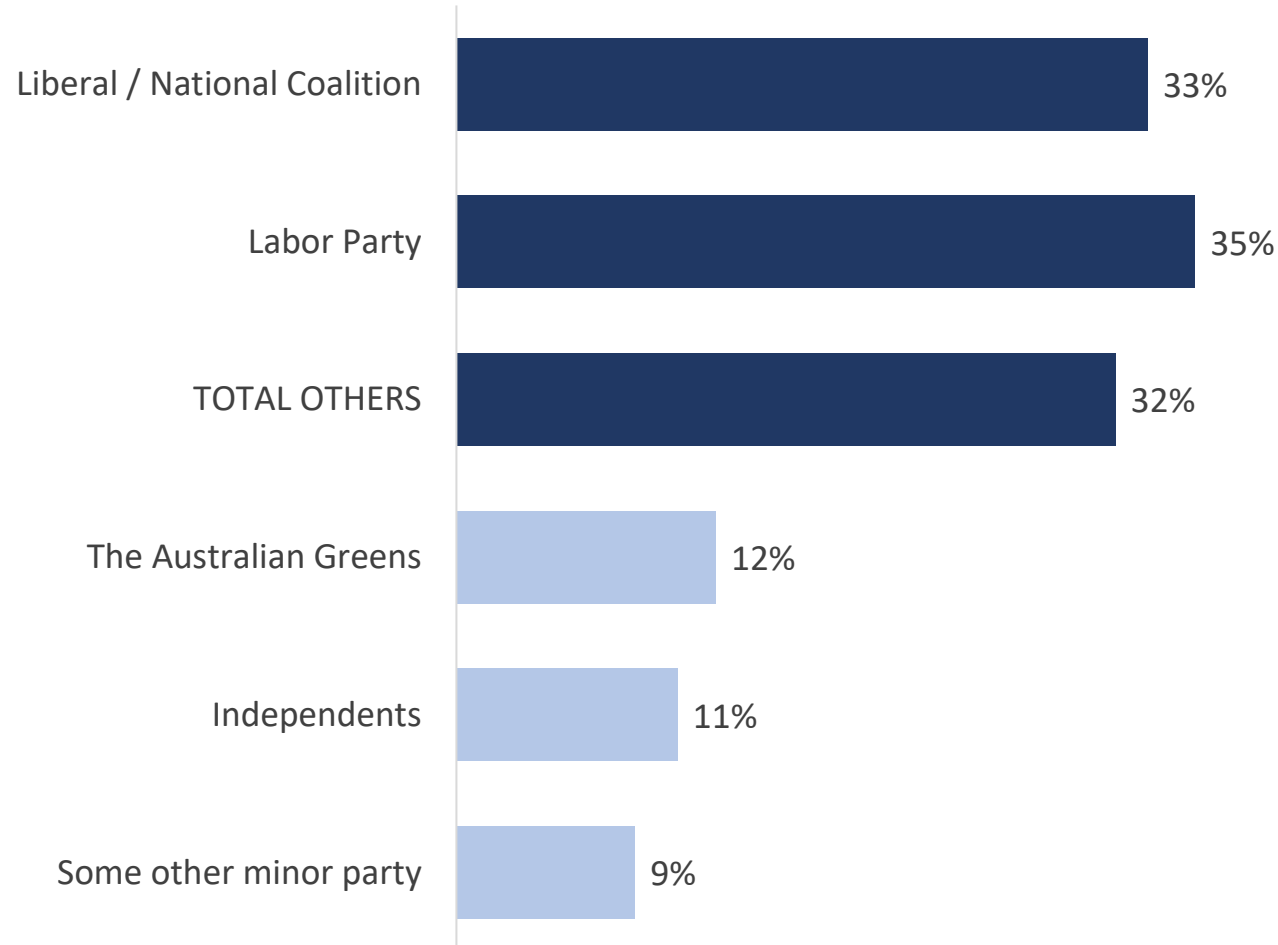
Level of Government most Responsible for Addressing Housing Issues



Q15. Which level of government do you think is most responsible for addressing housing issues?

Voters are divided on which major party is best to address housing issues.

Party Best to Address Housing Issues



Q16. Which political group or party do you think is best to address housing issues?

Housing Measures.

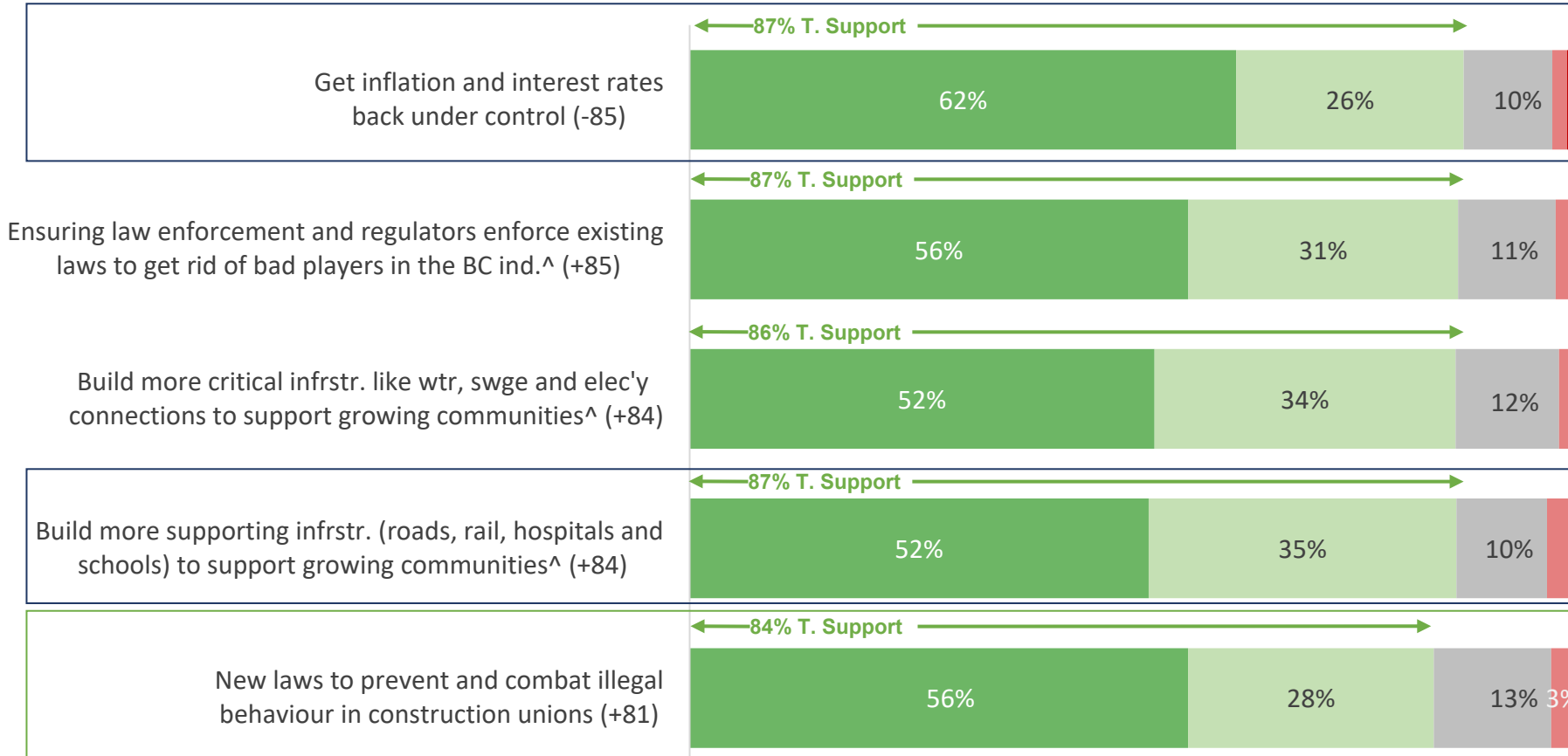
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Almost all proposed measures to address housing have majority voter support.

Housing Measures Support Summary (1/3)



■ Strongly support ■ Somewhat support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose

Sorted by Net Support: % Total Support - % Total Oppose

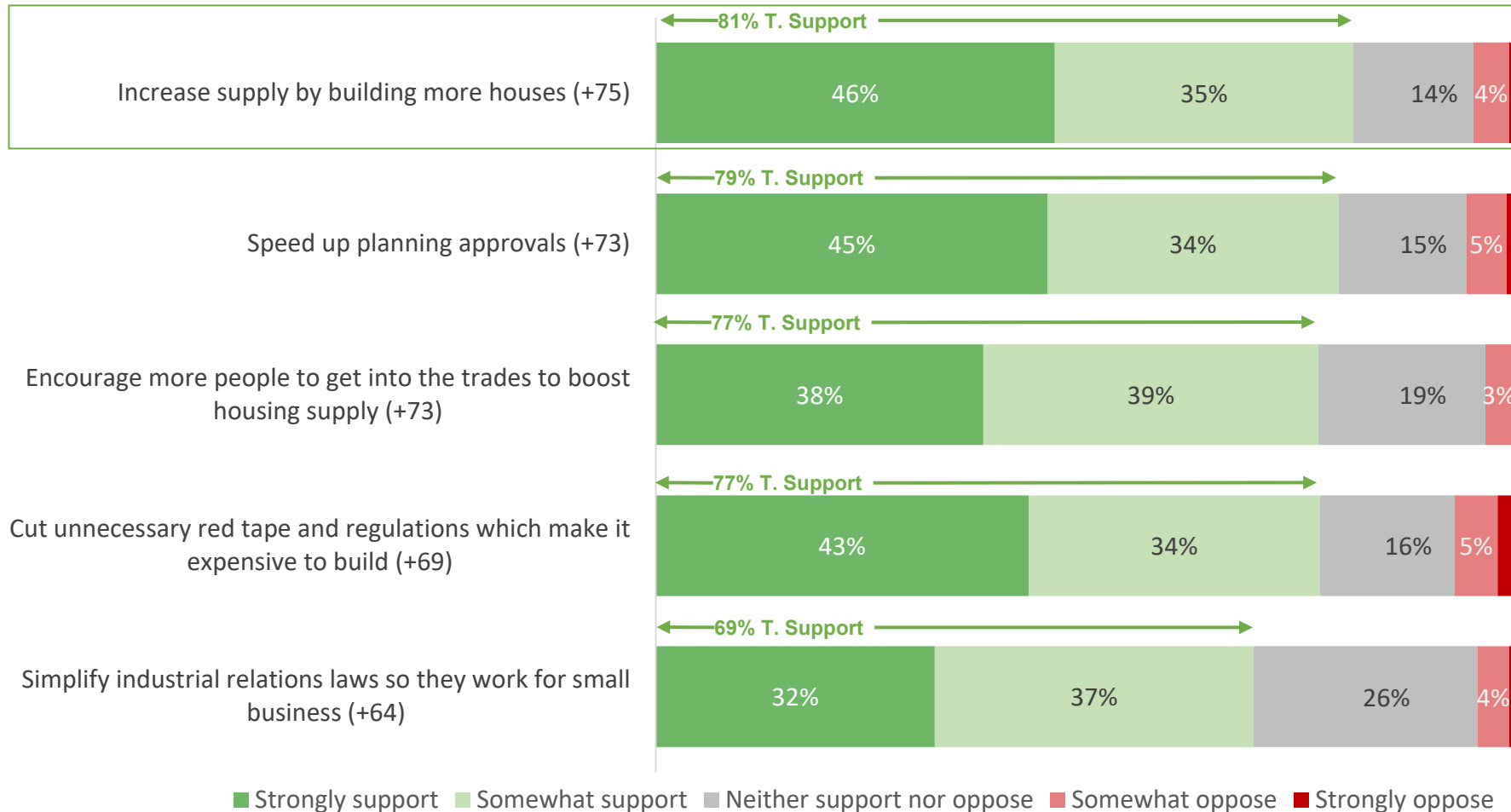
Q18. To what extent do you support each of the following measures to address housing issues?

N.B. labels <3% removed for clarity purposes, ^ Labels shortened

- The macro-economic measure of getting inflation and interest rates under control is supported by nearly two-thirds of Australian voters

Voters are less certain about simplifying industrial relations laws for small business.

Housing Measures Support Summary (2/3)



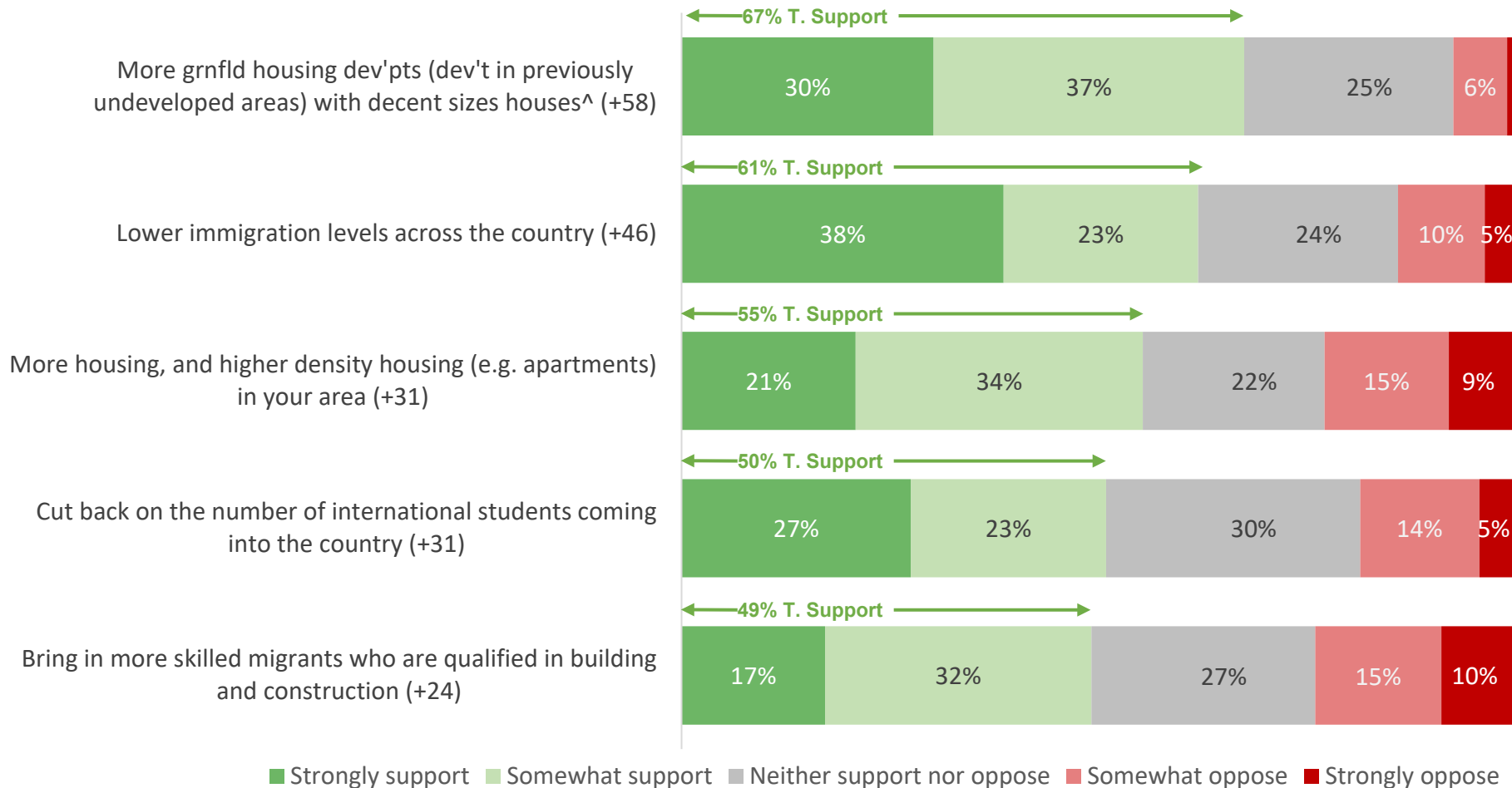
Sorted by Net Support: % Total Support - % Total Oppose

Q18. To what extent do you support each of the following measures to address housing issues?

N.B. labels <3% removed for clarity purposes, ^ Labels shortened

A majority of voters support more and higher density housing in their local area.

Housing Measures Support Summary (3/3)



Sorted by Net Support: % Total Support - % Total Oppose

Q18. To what extent do you support each of the following measures to address housing issues?

N.B. labels <3% removed for clarity purposes, ^ Labels shortened



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TRANSFORMING INSIGHTS INTO
ACTIONABLE STRATEGIES