

THE
growth
DISTILLERY presents

Needs of the Nation.

A framework for understanding the expectations of Australians and equipping governments to strategically engage in the areas that drive growth.

THE
growth
DISTILLERY

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What this work means for you...

Clear guidance

On the issues that matter to Australians.

A playbook

On how to engage with issues to avoid missteps, build confidence and preference with the Australian population.

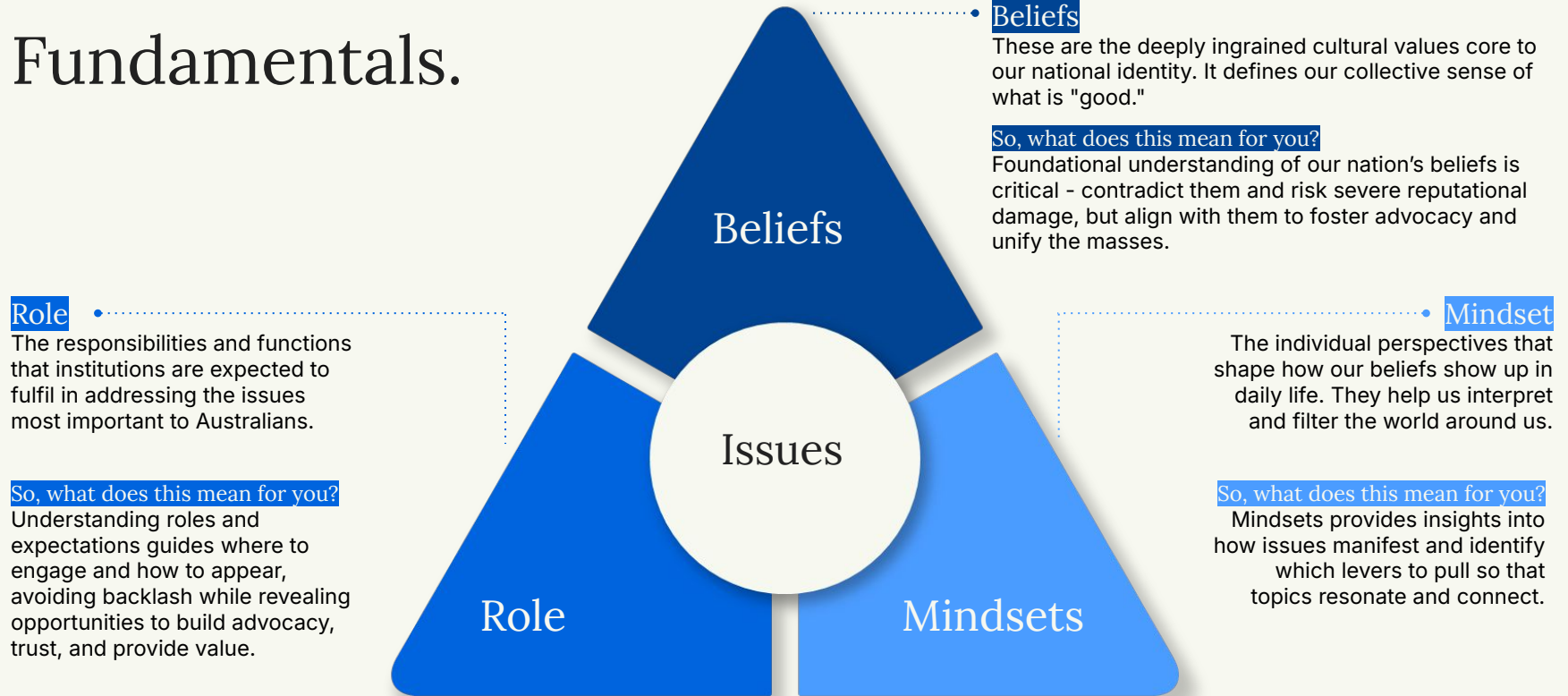
Where to play

The societal issues governments are expected to lean into and champion to win the hearts and minds of Australians.

How to win

Harnessing our nation's beliefs will deepen engagement and allow government to connect more authentically and responsibly with Australians.

The Fundamentals.





A quick word on pedigree...

Academic
consultation with
six experts.

Experts in:

Academia, social commentary, social history, psychology, literature and demography.

Listening and
interviewing 48
Australians.

250+ hours of listening.

48 Australian adults with a broad cross section across gender, age, ethnicity, household income, household structure, time living in Australia, education levels and mindsets.

Quantitative
validation with
6,000 Australians.

Validating the insights.

Robust questionnaire sizing the issues that matter most to Australians, enabling us to look at multiple sub-groups: demographics, political leaning, mindsets and ethnicity.



Act I:

The issues Australians care about and the role they expect government to play.

NO MORE
COALITION

SAFE
CLIMATE
FOR
PEACE

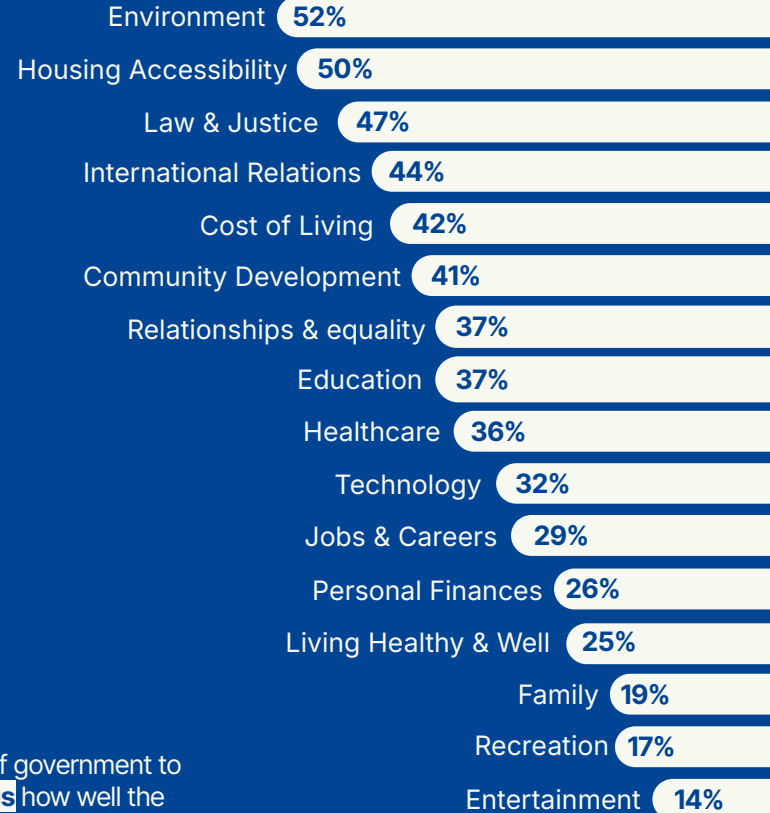
THEY
ARE
RISING

YOU WILL
DIE OF
DAMAGE
YOU ARE
WILL
STEALING
DIE OF
OUR
CLIMATE
FUTURE
CHANGES

Significant gaps exist between public expectations of government engagement and their perceptions on their effectiveness.

But this means there is a meaningful **opportunity** to **close the delivery gap** for Australians on the **issues they care about**.

Government performance gap (% Gap)



Importance of government to engage **minus** how well the they are delivering on the issue.

The government is falling short with Australians despite good intentions.

We have seen a number of missteps by governments trying to do the right thing, but not understanding the core expectations of Australians is doing them a disservice. This misalignment has led to a growing divide between well-meaning initiatives and how they are perceived by the public.

76%

consider it important for governments to actively engage in the issues they care about.

56%

do not believe governments are doing well in tackling the issues important to them.





Don't just take our
word for it, hear it
from them...

“

We have one of the worst cost of living, rental crisis in a century, our healthcare system is revoking all of the things we were known for, our government is spending unnecessary taxpayers money on things we don't need, and yet people still think our country is lucky, and I find that incredible.

Female 18-25, Metro NSW.

I'm concerned about pointless partisan politics adopted from the US slowing down Australia's progress as a free and fair society.

Male 35-44, Regional ACT.

"An effective government should rule for the good of all people, not just themselves or corporations."

Male 45-54, Metro QLD.

”



Governments must better
understand Australians to effectively
engage and lead in ways that foster
long-term trust and strengthen
public confidence.

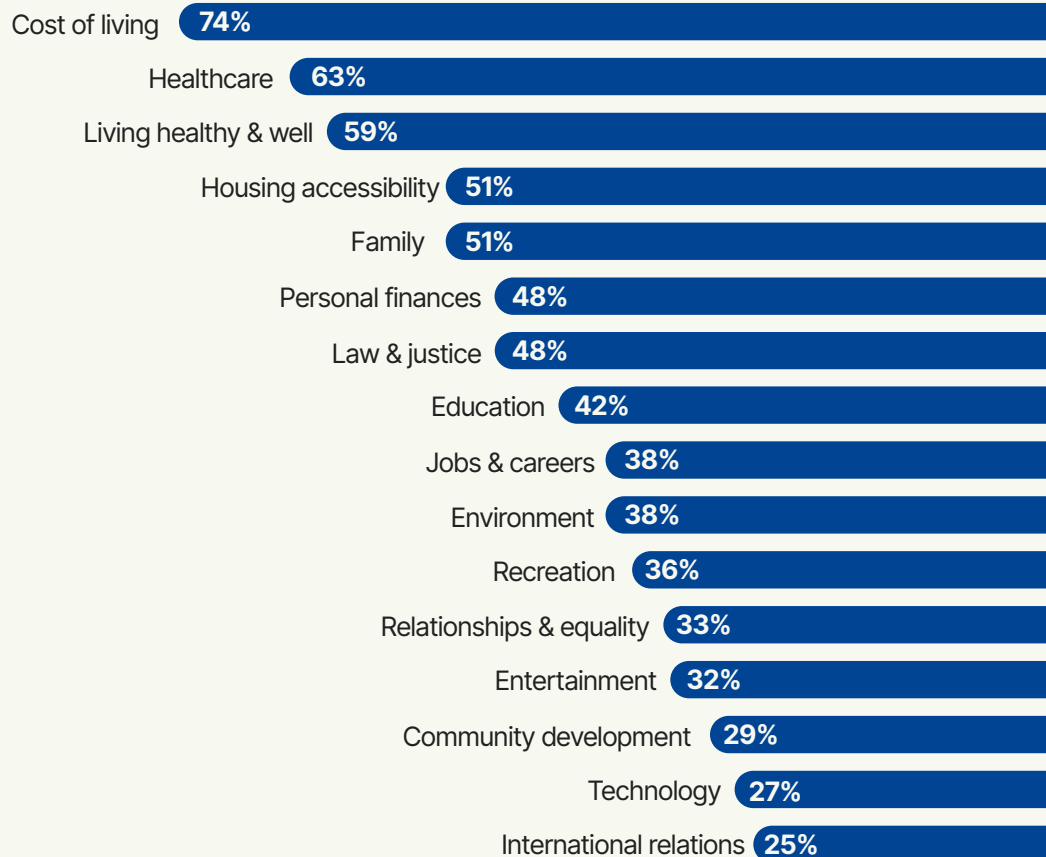




So, what does *the nation* care about?

The most common issues centre around pillars of 'wellbeing' - financial wellbeing, physical & mental wellbeing and social wellbeing.

Issues of importance to Australians 18+ (% important)





R


But, mind the
gap.

Governments are doing
better in some of these
issues than others...

To help prioritise resources and attention,
governments need to know where Australians want
them to engage and where they are perceived to be
falling short.



To cater to the issues Australians care about, governments must consider what's important and where they are falling short. To make positive and lasting impact the government must also know their *right to play*.



Institutions* must navigate a spectrum of roles to address the issues we care about most.

**Institutions include media, corporations, businesses, and government.*

Advocate

Focus on the **why**

Take action, lobby for necessary reforms and lead by example to drive change.

Educate & influence

Focus on the **how**

Implement programs that explain how Australians can take action and benefit from initiatives.

Inform

Focus on the **what**

Provide clear, accurate information about initiatives to keep Australians well-informed.

No input

No input or say

There is no permission to play in this space. Speaking up can be detrimental.



The government is expected to lead the charge and advocate for the things Australians care about most.

Advocate

- Housing accessibility
- Environment
- Law & justice
- International relations
- Cost of Living
- Community development
- Relationships and equality
- Education
- Healthcare

Educate & Influence

- Family
- Jobs & careers
- Technology

Inform

- Personal finances
- Recreation
- Living healthy & well
- Entertainment

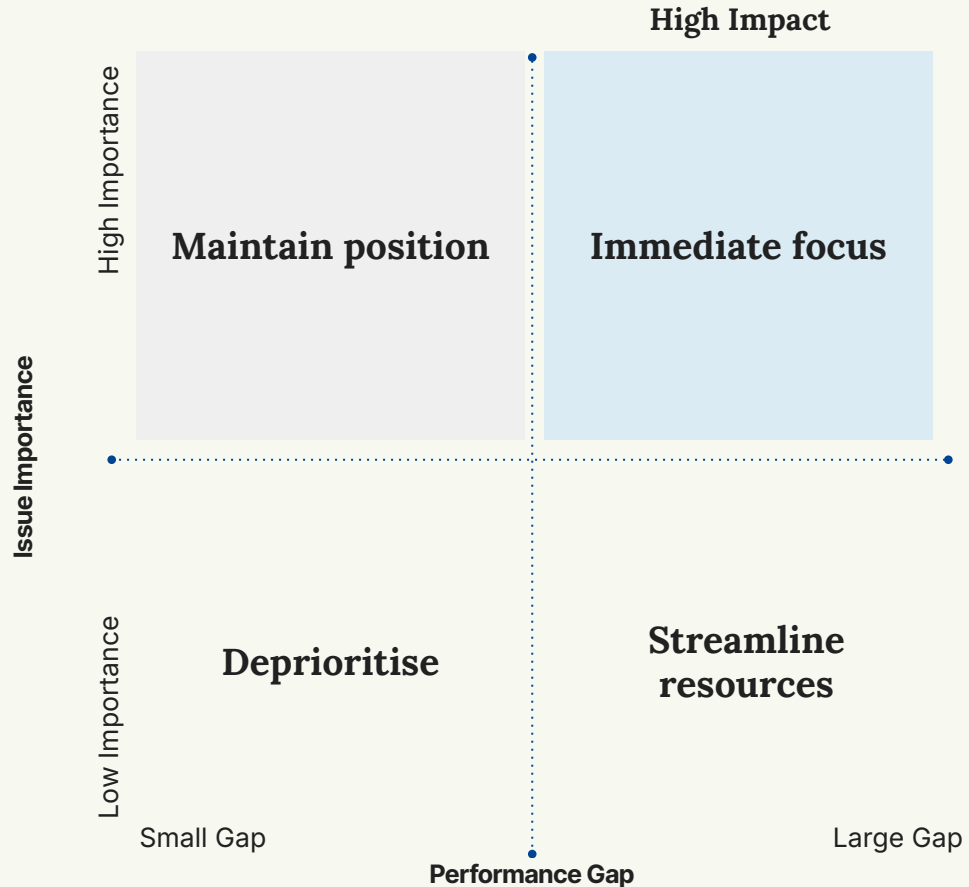
No input

So *where* should governments play?

Prioritise high-impact gaps.

Focus on issues that are highly important to Australians but where governments' delivery is falling short. These areas present the **greatest opportunity for growth**.

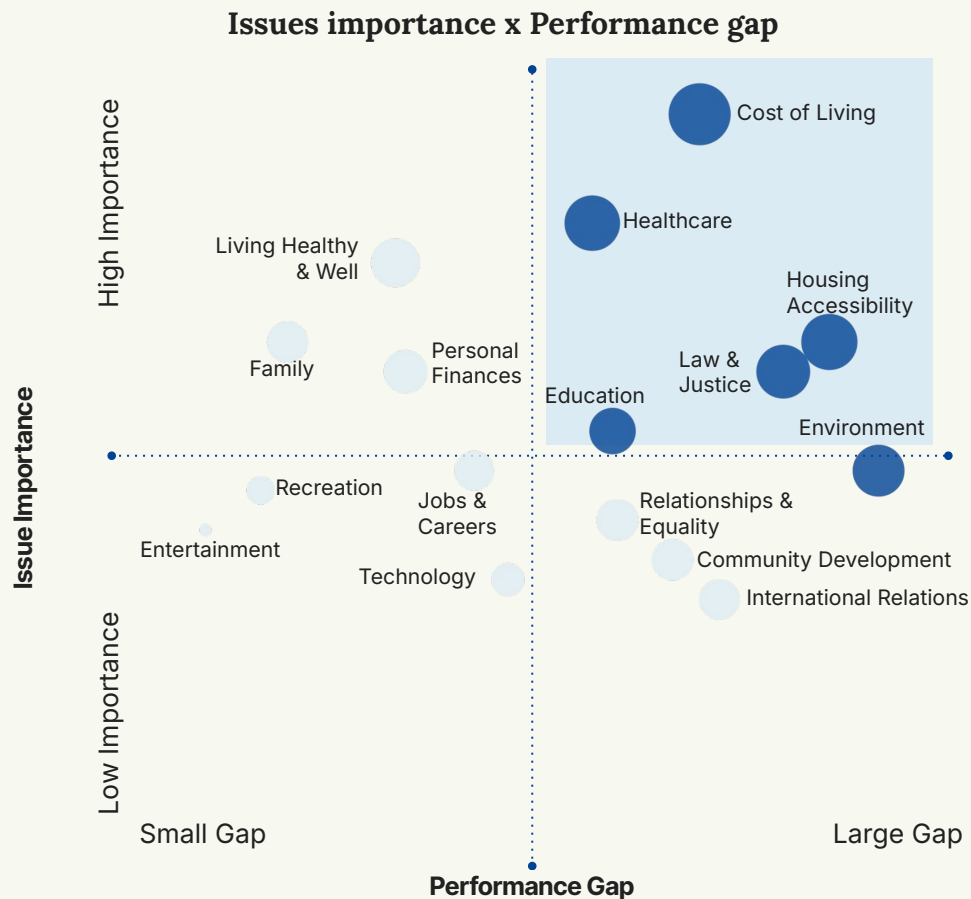
Governments must also not lose sight and maintain their position on the important issues where expectations are being met.



Key priorities for government action.

To effectively address the nation's most pressing issues, the government needs to focus on the areas that are critically important to Australians but also where government performance is falling short. These issues are:

- **Cost of living**
- **Healthcare**
- **Housing accessibility**
- **Law & Justice**
- **Education**
- **Environment**



A double click on the issues with high-impact performance gaps...

What aspects of these issues are of most importance to Australians?

	Cost of living	Healthcare	Housing accessibility	Law & justice	Education	Environment
1	Grocery/retail prices	Affordable healthcare	Housing Affordability	Crime prevention & law enforcement	Access and affordable higher education options	Climate change mitigation and adaptation
2	Utility costs	Access to healthcare	Rental shortage	Judicial system reform and access to justice	Childhood education development	Green/renewable energy
3	Transport and petrol prices	Mental health support	Homelessness prevention & support	Human rights	Youth empowerment and skills development	Environmental conservation and preservation
4	Inflation	Aged care	Interest rates	Anti-corruption measures	Teacher recruitment, training and retention	Management of natural resources
5	Household budgeting	Preventative healthcare services	Foreign ownership of property	Freedom of speech and press freedom protection	Remote learning and online education	Sustainable training/resources for farmers



Knowing the
issues to
prioritise is
only half the
picture...

L

The other half is
executional excellence.

If done right it
insulates governments
against the unknown &
unlocks broad appeal
and deep engagement.



How do you do this?

To reduce the risk of marginalising Australians but still appealing to their motivations and aspirations:

Align to the most relevant belief for the given issue.

Doing this can help rally the masses and reduce alienating consumer segments.

Tailor to mindsets as beliefs will show up differently in individuals.

Delivery can then be adapted to increase emotional appeal and connection to the issue.



Act II:

Australians are clear on where governments can play and in what capacity, but to truly connect, how you show up and speak ultimately defines your impact...

There are *five beliefs* that underpin our national identity, unique to Australia, and are the backbone of what makes our nation great.

Belief in our People

Its essence:

We have the right to be treated equally and everyone gets a fair go.

Belief in our Place

Its essence:

We have the right to feel secure, safe and rooted.

Belief in our Land

Its essence:

We live in a land of unique possibilities.

Belief in our Ourselves

Its essence:

We give it a go, we have tenacity and grit.

Belief in Each Other

Its essence:

We look out for our own and have each other's backs.

These beliefs are universally held and shared - we are united in the inherent role they play to the future success of our nation.



Cultural beliefs are the critical starting point to address government disconnect.

In a time when social cohesion is at its lowest levels, *fostering a stronger connection and reinforcing Australia's belief systems can significantly enhance our social fabric*, thereby promoting societal progress and positive change.

Fail to align with
these beliefs and the
reputational
blowback is severe.

MERRY
CRISIS!!

SHAME!



Anchoring issues to beliefs will unlock *greater positivity and impact* for governments.

Different issues anchor closer certain to Australian beliefs. For example, concerns about the environment are inherently linked to our beliefs in our place and our land, whereas issues around relationships and equality are linked closest to our beliefs in our people, place and each other.

By consciously using beliefs when governments talk to Australians on these issues, while ensuring they play the role expected of them, governments unlock the ability for deeper connection and, in some instances, the opportunity to build advocacy, **both for a cause but also themselves.**

But...

Beliefs are insufficient on their own. It is our *individual mindsets* that dictate how our beliefs show up in our daily lives.

Mindsets are the lenses we apply to help help us navigate the world around us. They help us interpret issues, process information, and make decisions.

While individuals generally have a default set of mindsets, these can vary depending on the context. Mindsets are individually held and transcend demographic boundaries.



Mindsets can be a much stronger predictor of human behaviour than demographics.



Scott Morrison

Born 1968
Raised in Sydney
Married once
Two Children
Wealthy
Famous



Hugh Jackman

Born 1968
Raised in Sydney
Married once
Two Children
Wealthy
Famous

So... what are mindsets?

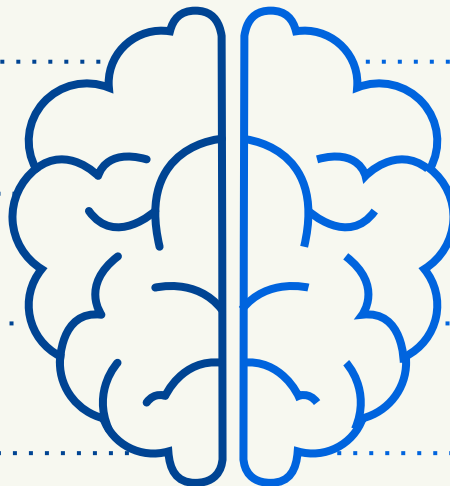
There are four mindset dichotomies that dictate how our beliefs manifest and show up in our lives. We each have a 'default mode' when it comes to how we behave and react to the world around us, shaped by multiple factors including our environment, upbringing and natural disposition.

Traditional (68%): value long-established customs, preferring stability over change.

Collectivist (36%): prefers being part of an extended family & broader community.

Mainstream (51%): aligns with widely accepted norms and popular trends within society.

Fixed (53%): happy with their position in life.



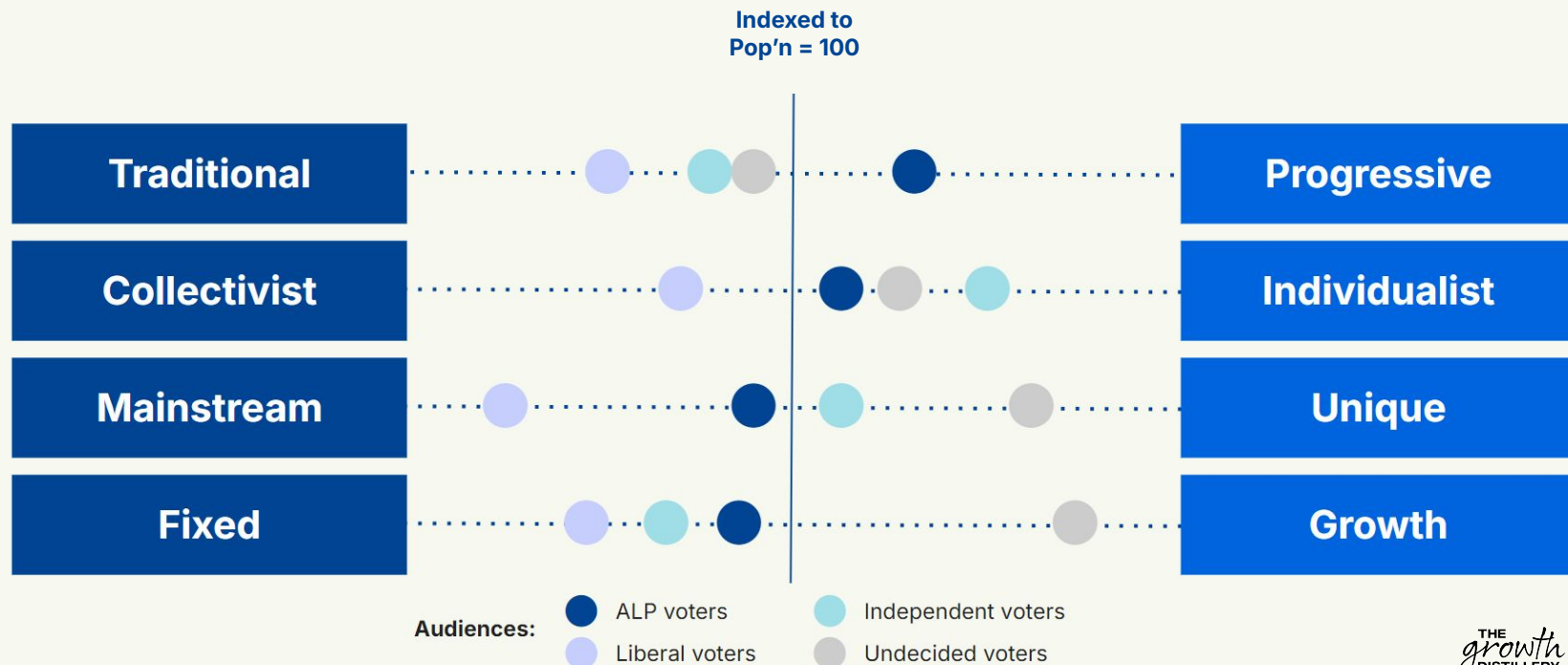
Progressive (32%): embraces innovation and reform, seeking to challenge and improve current systems and norms.

Individualist (64%): prefers to focus on themselves and their immediate family.

Unique (49%): stands out from the norm and embraces unconventional ideas and originality.

Growth (47%): looking to get ahead in life and improve their position.

Undecided voters are most similar in mindset to Independents, with the exception of their growth orientation.





Mindsets provide guidance to the most potent engagement levers.

Our individual mindsets are the lens through which we see an issue and respond to messages. By leaning on particular markers the resonate with each mindset, governments can engage Australians more effectively.

So, what are the markers governments must be looking to?

Traditional vs. Progressive

Honouring heritage with time-tested traditions versus pioneering the future with data driven innovation.

Traditional

Authority

Reinforce the government's role to act on behalf of Australians.

Consistency

Ensure messaging remains steady and reliable over time to build public trust.

Fairness

Develop and communicate policies that emphasise equal treatment and justice.

Sanctity

Shape policies to resonate with core societal beliefs and standards.

Proven before

Lean on successful initiatives to validate current proposals and instill confidence.

Progressive

Proof points & rationale

Provide data driven solutions and logical arguments to support policies and initiatives.

Purpose & Possibility

Communicate a compelling vision of future improvements and positive change.

Disengage with status quo

Encourage innovation and challenge existing norms through modern reforms and initiatives.

Collectivist vs. Individualist

Fostering community and cooperation versus valuing personal freedom and autonomy.

Collectivist

Social proof

Demonstrate widespread community support and participation in government programs.

Affiliation

Build a sense of national unity and shared identity in messaging.

Cooperation

Encourage collaboration between the government and the public.

Loyalty and trust

Foster long term relationships by demonstrating reliability and commitment.

Local

Focus on local issues and community benefits to connect at a personal level.

Individualist

Autonomy

Highlight the importance of personal choice and individual rights.

Freedom

Emphasise the value of independence and the protection of personal freedoms.

Affirmation

Provide recognition and positive reinforcement for individual contribution.

Directness

Communicate in a transparent and honest manner.

Reciprocity

Show a give and take relationship where support and benefits are mutual and beneficial.

Mainstream vs. Unique

Finding comfort in the familiar versus thriving on uniqueness and individuality.

Mainstream

What's popular

Use trends and widely accepted ideas to shape government messaging.

Conforming

Align government actions with common practices and societal expectations.

Low risk

Emphasise safety, stability and minimal risk.

Societal proof and norms

Highlight examples of successful adoption and positive outcomes of policy.

Unique

New and different

Promote innovative government programs and policies.

Trial and experimentation

Communicate a compelling vision of future improvements and positive change.

Stand out

Showcase unique government achievements and contributions to foster a sense of pride and distinction.

Growth vs. Fixed

Chasing ambitious dreams and taking risks versus embracing steady progress with balanced stability.

Growth

Goals and ambition

Be future focused and encourage community input.

FOMO

Highlight opportunities and benefits of government proposals.

Take risks

Promote the benefits of embracing calculated risks in initiatives to achieve significant improvements.

Change and transformation

Emphasise the potential for meaningful change and transformation through progressive government action.

Fixed

Strive for balance

Advocate for a balanced approach in government policies.

Optimism

Focus on positive outcomes and that government actions lead to a better future.

Slow but steady

Encourage gradual progress and consistent effort to build sustainable improvements.

Reassurance

Reinforce the role of government to improve the life of all Australians.

An example of how aligning with beliefs can have significant upside.

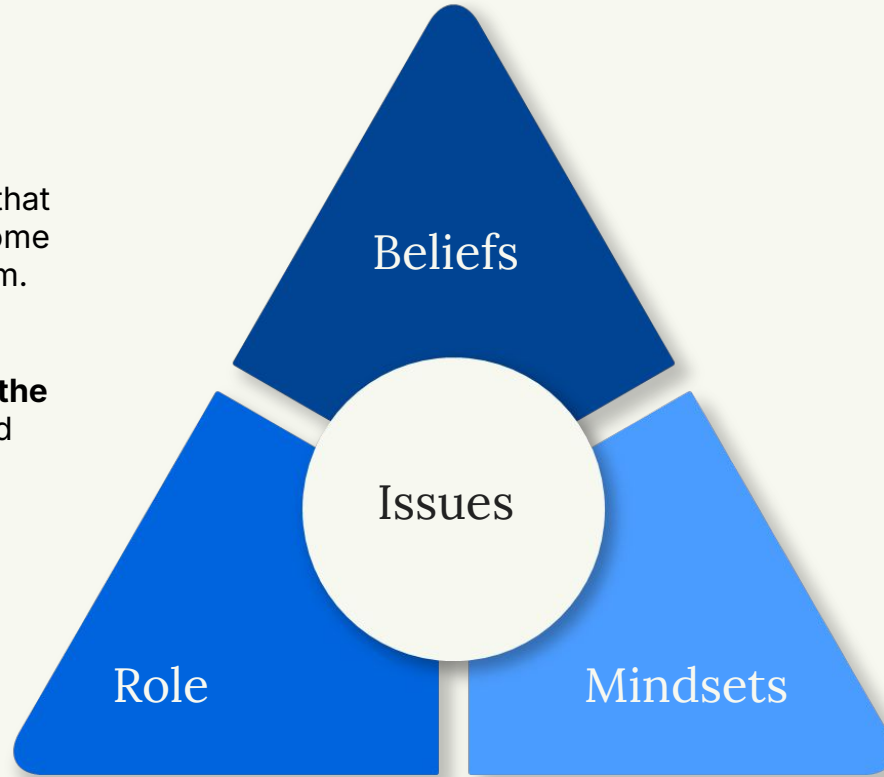
Situation	Beliefs	Upside
<p>In 2021, NZ government launched their Covid vaccine campaign "Ka Kite, Covid" (See you, Covid) with the goal to get 'strength in numbers' & drive vaccine uptake.</p>	<p>NZ similar in beliefs to Australia, anchored their campaign to the belief in Each Other and our Land with the CVP "The stronger our immunity, the greater our possibilities."</p>	<p>Strong relatability Scored 7.6 on 'relevance' and 8.5 on affinity with the vaccine.</p> <p>Cut through with younger audiences, ~60% 18-34's intended to get the jab after seeing the ad.</p>



Remember Me?

Governments tackle most of the issues that Australians care about and it's rare to come across an issue that doesn't involve them.

However the key lies in executing well across the three areas of the **'Needs of the Nation' framework** to win the hearts and minds of Australians.



What all of this means for **Governments**:

Prioritise Issues

For maximum impact, align with the issues that Australians care about and where you can close the performance gap:

- *Cost of Living, Healthcare, Housing Accessibility, Law & Justice, Education and Environment.*

Play your Role

Governments are expected to lead the charge and advocate on most issues. Deliver on the role expected of you and acknowledge your right to play.

Identify Beliefs

Anchor to the most relevant belief for the issue, and whatever you do don't go against the nation's belief system.

Link to Mindsets

Tailor the message to the mindset you are targeting to achieve the biggest impact.



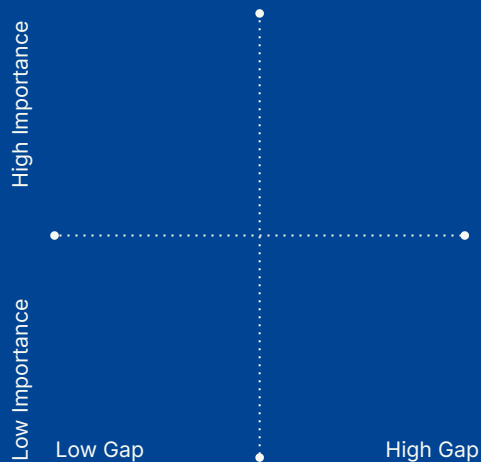


Act III:

Applying the framework to audiences of interest.



Your playbook on meeting your audience's needs.



Issues to
prioritise.

Issues of
concern.

Our role
to play.

Beliefs to
anchor to.

Where are
they going.

Mindsets to
engage.

Engagement
Levers

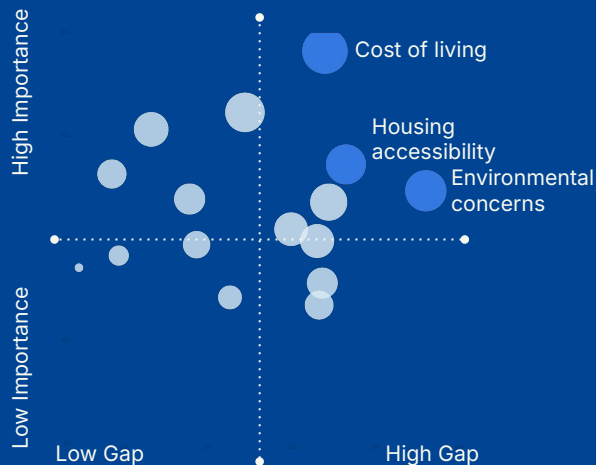
Where to focus.

How & where
to show up.

Who you're
engaging.

Left wing voters.

Intend to vote for The ALP or Greens.



Issues to prioritise.



Cost of Living



Housing Accessibility



Environmental concerns

Issues of concern.

Grocery prices
Utility costs
Inflation

Housing affordability
Rental shortage
Homelessness

Climate change
Green energy
Conservation & preservation

Your role to play.

Advocate

- Transparent and ethical conduct
- Provide constructive solutions

Advocate

- Empathise and highlight human experiences
- Authentic and motivational leadership

Advocate

- Provide clarity on complex issues
- Regulate businesses

Beliefs to anchor to.

Belief in our People & Place

Belief in our People & Place

Belief in our Place & Land

Where are they going.

Aggregators
Government sites
YouTube

YouTube
Government sites
TikTok

Government sites
TV
TikTok

Mindsets to engage.

Progressive

Proof & rationale
Purpose & possibility
Challenge status quo

Individualist

Autonomy
Freedom
Affirmation
Directness
Reciprocity

Unique

New and different
Trial and experimentation
Stand out

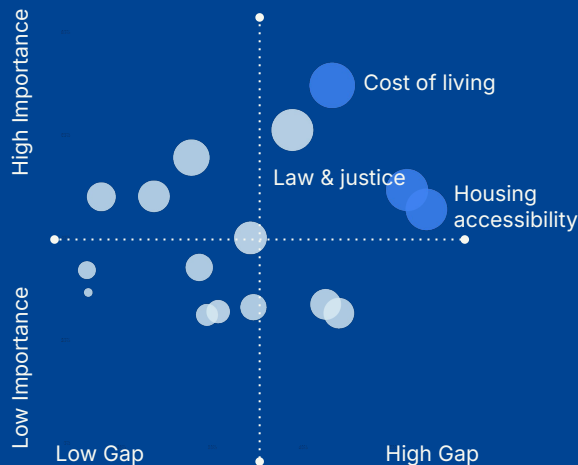
Growth

Goals & ambition
FOMO
Take risks
Change & transformation

Engagement Levers

Right wing voters.

Intend to vote for The Coalition or One Nation.



Issues to prioritise.

Issues of concern.

Your role to play.

Beliefs to anchor to.

Where are they going.

Mindsets to engage.

Engagement Levers



Cost of Living

Grocery prices
Utility costs
Transport prices

Advocate

- Respond to national incidents and crises
- Regulate businesses and institutions

Belief in our People & Place

Printed media
TV
Radio

Traditional

Authority
Consistency
Fairness
Sanctity
Proven before



Law & Justice

Crime prevention
Judicial reform
Anti-corruption

Advocate

- Communicate and educate with factual information
- Actively shape legislation

Belief in our People & Place

Radio
Printed Media
YouTube

Collectivist

Social proof
Affiliation
Cooperation
Loyalty & trust
Local



Housing Accessibility

Housing affordability
Rental shortage
Homelessness

Advocate

- Transparent and ethical conduct
- Manage national resources and infrastructure

Belief in our People & Place

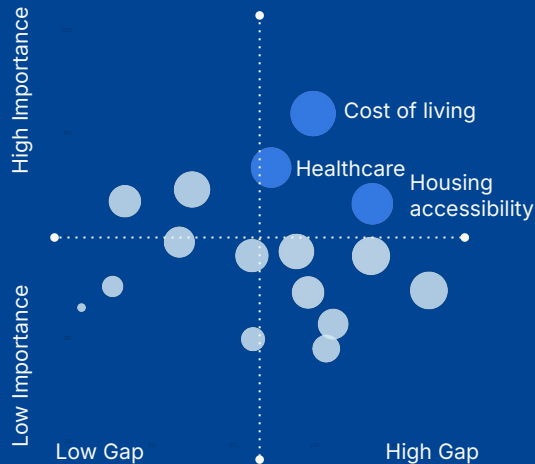
Radio
TV
News websites/apps

Fixed

Strive for balance
Optimism
Stability
Reassurance

Swing voters.

Undecided voters.



Issues to prioritise.



Cost of Living



Healthcare



Housing Accessibility

Issues of concern.

Grocery prices
Utility costs
Transport prices

Affordable healthcare
Access to healthcare
Mental health support

Housing affordability
Rental shortage
Homelessness

Your role to play.

Advocate

- Simplify and provide clarity on complex issues
- Amplify individual voices

Advocate

- Respond to national incidents and crises
- Provide a range of perspectives and viewpoints

Advocate

- Respond to national incidents and crises
- Communicate and educate with factual information

Beliefs to anchor to.

Belief in our People & Place

Belief in our People & Place

Belief in our People & Place

Where are they going.

Social media
WOM
Radio

WOM
Social Media
Podcasts

TikTok
Social Media
WOM

Mindsets to engage.

Traditional

Individualist

Unique

Growth

Authority
Consistency
Fairness
Sanctity
Proven before

Autonomy
Freedom
Affirmation
Directness
Reciprocity

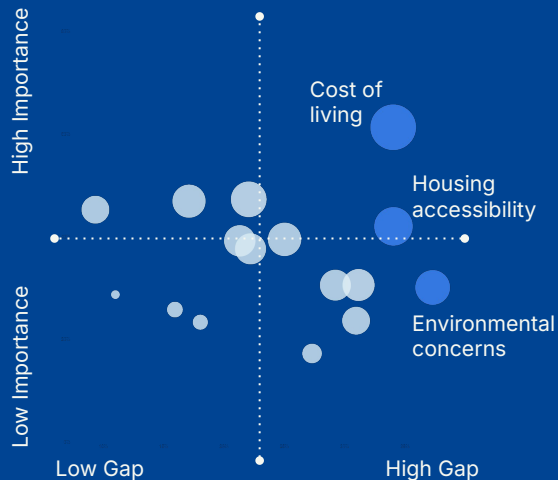
New and different
Trial and experimentation
Stand out

Goals & ambition
FOMO
Take risks
Change & transformation

Engagement Levers



Under 40s.



Issues to prioritise.

Issues of concern.

Your role to play.

Beliefs to anchor to.

Where are they going.

Mindsets to engage.

Engagement Levers



Housing Accessibility

Housing affordability
Rental shortage
Homelessness

Advocate

- Simplify and provide clarity on complex issues
- Have transparent and ethical conduct

Belief in our People & Place

Tiktok
Podcasts
Youtube



Environmental concerns

Climate change mitigation
Green Energy

Advocate

- Showcase different perspective
- Educate with factual information

Belief in our Place & Land

Tiktok
Blogs
Podcasts



Cost of Living

Grocery costs
Utility costs
Inflation

Advocate

- Educate with factual information
- Encourage community feedback & engagements

Belief in our People & Place

Tiktok
Podcasts
Social media

Progressive

Proof points
Purpose & possibility
Change the status quo

Individualist

Autonomy
Freedom
Affirmation
Directness
Reciprocity

Mainstream

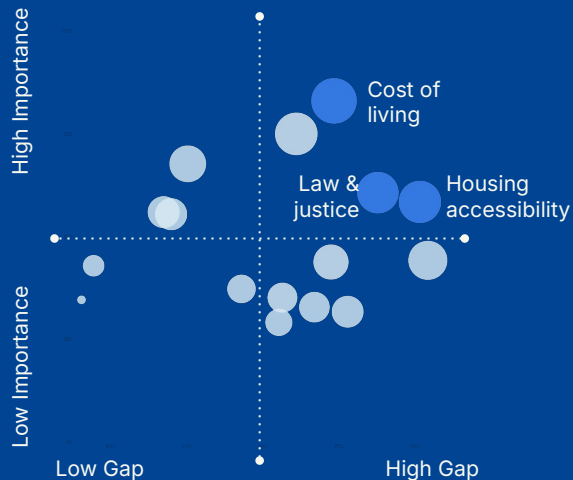
What's popular
Conforming
Low risk
Societal proof and norms

Growth

Change & transformation
Goals & ambition
FOMO
Take risks



Over 40s.



Issues to prioritise.



Cost of Living



Law and Justice



Housing Accessibility

Issues of concern.

Grocery prices
Utility costs
Transport prices

Crime prevention &
law enforcement
Judicial system reform

Housing affordability
Rental shortage
Homelessness

Your role to play.

Advocate

- Regulate businesses and institutions
- Actively shape policy and legislation

Advocate

- Actively shape policy and legislation
- Regulate businesses and institutions

Advocate

- Engage in social impact and advocacy
- Amplify individual voices to shape policy

Beliefs to anchor to.

Belief in our
People & Place

Belief in our
People & Place

Belief in our
People & Place

Where are they going.

Radio
Printed media
TV

Radio
WOM
News websites

TV
Printed media
Radio

Mindsets to engage.

Traditional

Individualist

Mainstream

Fixed

Authority
Consistency
Fairness
Sanctity
Proven before

Autonomy
Freedom
Affirmation
Directness
Reciprocity

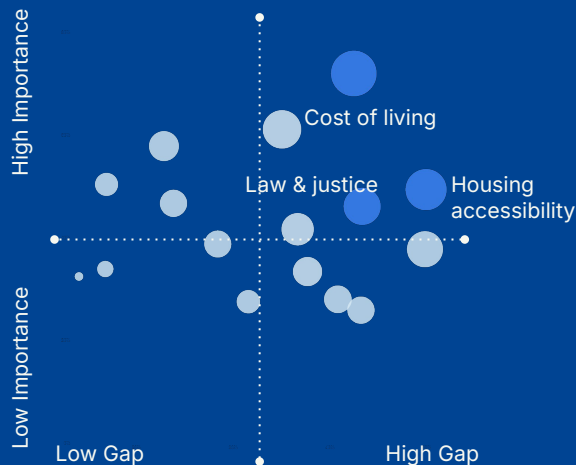
What's popular
Conforming
Low risk
Societal proof
and norms

Strive for
balance
Optimism
Stability
Reassurance

Engagement Levers

Metropolitan Australia.

Australians living within capital cities.



Issues to prioritise.



Cost of living



Housing Accessibility



Law & Justice

Issues of concern.

Grocery costs
Utility costs
Transport prices

Housing affordability
Rental shortage
Homelessness

Crime prevention & law enforcement
Judicial system reform

Your role to play.

Advocate

- Empathise and highlight human experiences
- Provide constructive solutions

Advocate

- Amplify individual and community voices
- Encourage feedback from the community

Advocate

- Provide clarity on complex issues
- Authentic and motivational leadership

Beliefs to anchor to.

Belief in our People & Place

Belief in our People & Place

Belief in our People & Place

Where are they going.

News websites
YouTube
TikTok

Search
Government sites
TikTok

Search
Aggregators
YouTube

Mindsets to engage.

Progressive

Individualist

Mainstream

Growth

Proof & rationale
Purpose & possibility
Challenge status quo

Autonomy
Freedom
Affirmation
Directness
Reciprocity

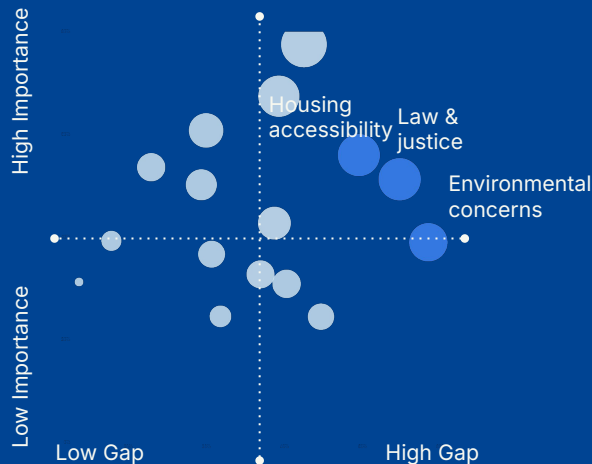
What's popular
Conforming
Low risk
Social proof & social norms

Goals & ambition
FOMO
Take risks
Change & transformation

Engagement Levers

Regional Australia.

Australians not living within capital cities.



Issues to prioritise.



Housing Accessibility

Housing affordability
Rental shortage
Homelessness



Law and Justice

Crime and Law enforcement
Judicial system reform
Anti corruption



Environmental Concerns

Environmental conservation
Management of natural resources

Issues of concern.

Your role to play.

Advocate

- Educate with factual information
- Showcase different perspectives

Advocate

- Provide constructive solutions
- Actively shape policy and legislation

Advocate

- Manage national resources
- Empathise human experiences

Beliefs to anchor to.

Belief in our People & Place

Belief in our People & Place

Belief in our Place & Land

Where are they going.

Social media
WOM
TV

Social media
WOM
News websites

Radio
WOM
Search

Mindsets to engage.

Traditional

Individualist

Unique

Fixed

Authority
Consistency
Fairness
Sanctity
Proven before

Autonomy
Freedom
Affirmation
Directness
Reciprocity

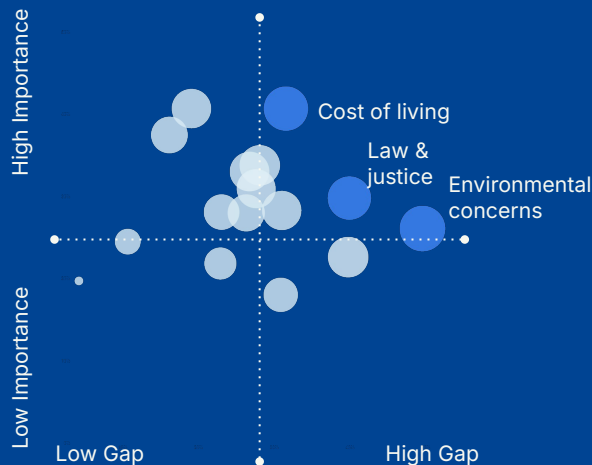
New and different
Trial and experimentation
Stand out

Strive for balance
Optimism
Stability
Reassurance

Engagement Levers

High affluents.

Top 10% household income.



Issues to prioritise.



Cost of living



Law and Justice



Environmental Concerns

Issues of concern.

Grocery prices
Inflation
Utility costs

Crime and Law enforcement
Judicial system reform
Anti corruption

Environmental conservation
Green energy

Your role to play.

Advocate

- Educate with factual information
- Manage national resources

Advocate

- Encourage feedback from community
- Simplify and clarify complex issues

Advocate

- Provide a range of perspectives
- Have transparent and ethical conduct

Beliefs to anchor to.

Belief in our People & Place

Belief in our People & Place

Belief in our Place & Land

Where are they going.

TikTok
Podcasts
YouTube

TikTok
YouTube
Search

TikTok
Conferences/Webinars
News websites

Mindsets to engage.

Progressive

Collectivist

Mainstream

Fixed

Proof & rationale
Purpose & possibility
Challenge status quo

Social proof
Affiliation
Cooperation
Loyalty & trust
Local

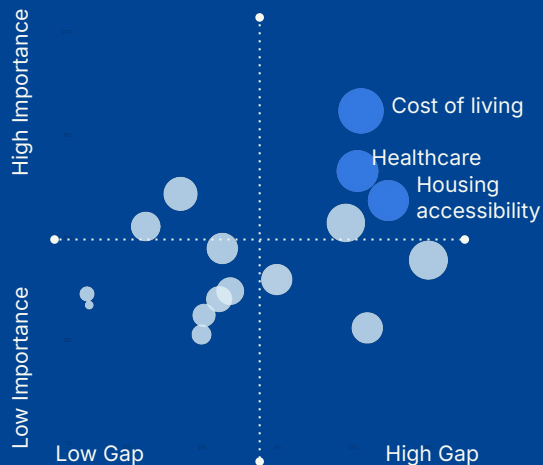
What's popular
Conforming
Low risk
Social proof & social norms

Strive for balance
Optimism
Stability
Reassurance

Engagement Levers

Low affluents.

Bottom 10% household income.



Issues to prioritise.



Cost of living



Healthcare



Housing accessibility

Issues of concern.

Grocery prices
Utility costs
Transport prices

Affordable healthcare
Access to healthcare
Aged care

Housing affordability
Rental shortage
Homelessness

Your role to play.

Advocate

- Manage national resources
- Actively shape policy & legislation

Advocate

- Empathise human experiences
- Engage in social impact and advocacy

Advocate

- Amplify individual voices
- Engage in social impact and advocacy

Beliefs to anchor to.

Belief in our
People & Place

Belief in our
People & Place

Belief in our
People & Place

Where are they going.

WOM
Government websites
News websites

Search
Government websites
WOM

Social media
WOM
TV

Mindsets to engage.

Traditional

Individualist

Unique

Fixed

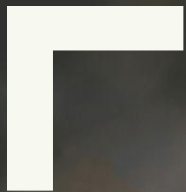
Authority
Consistency
Fairness
Sanctity
Proven before

Autonomy
Freedom
Affirmation
Directness
Reciprocity

New and different
Trial and
experimentation
Stand out

Strive for
balance
Optimism
Stability
Reassurance

Engagement Levers



Want to know more?

Needs of the Nation is a two part exploration presented by **The Growth Distillery** in partnership with TRA.

We invite you to explore the application and implication of this framework across our other module covering **large corporations**, available at:

www.thegrowthdistillery.com.au

