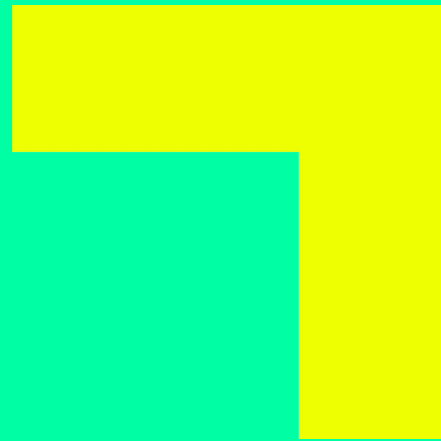
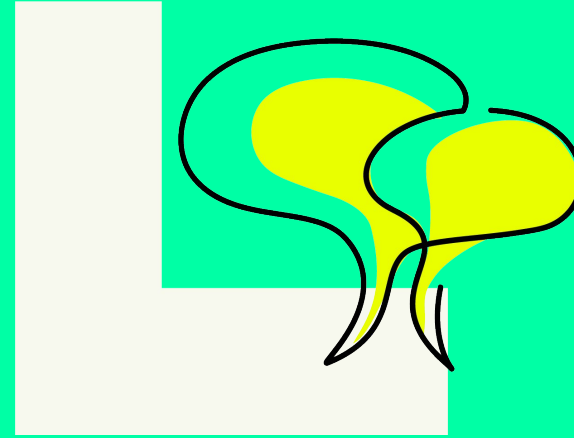


Australia Unmasked



Unveiling the Shifts in Our National Psyche



Welcome to Australia Unmasked

Five years. What can change in a nation in half a decade? In the case of Australia, quite a lot. Today, we peel back the layers and unmask the evolving attitudes shaping our diverse society. This insightful journey draws upon analysis of 5 years of longitudinal attitude data from Roy Morgan, illuminating the currents shifting beneath the surface of our national identity. This has been done in advance of a project currently underway by [The Growth Distillery](#) which is examining what the beliefs are that truly unite us.

Through this lens, we examined key themes that paint a vivid picture of Australia's transformation:

Growing Wealth Divide: how economic disparities are impacting lives across the nation.

Health under pressure: explore the challenges and opportunities in our pursuit of a healthy life.

Metamorphosis of the Family Unit: Discover how our connections to others are changing.

We've also compared attitudes across different age groups, states, and even metro versus regional communities. This nuanced approach paints a rich picture of how Australia's diverse population is evolving.

Let's unmask the shifts in our national psyche, confront the challenges, celebrate the opportunities, and gain a profound understanding of the Australia we are becoming. Get ready to be informed, surprised, and inspired by the insights we reveal.

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A Growing Wealth Divide




The gap between rich and poor has grown

9_{in}10 +5%

Australians agree

Since 2019

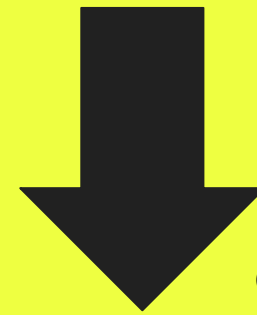
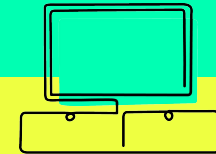


It's the **non-essential**
purchase power that
truly separates us



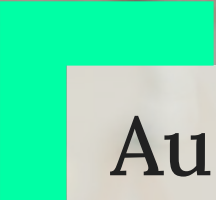
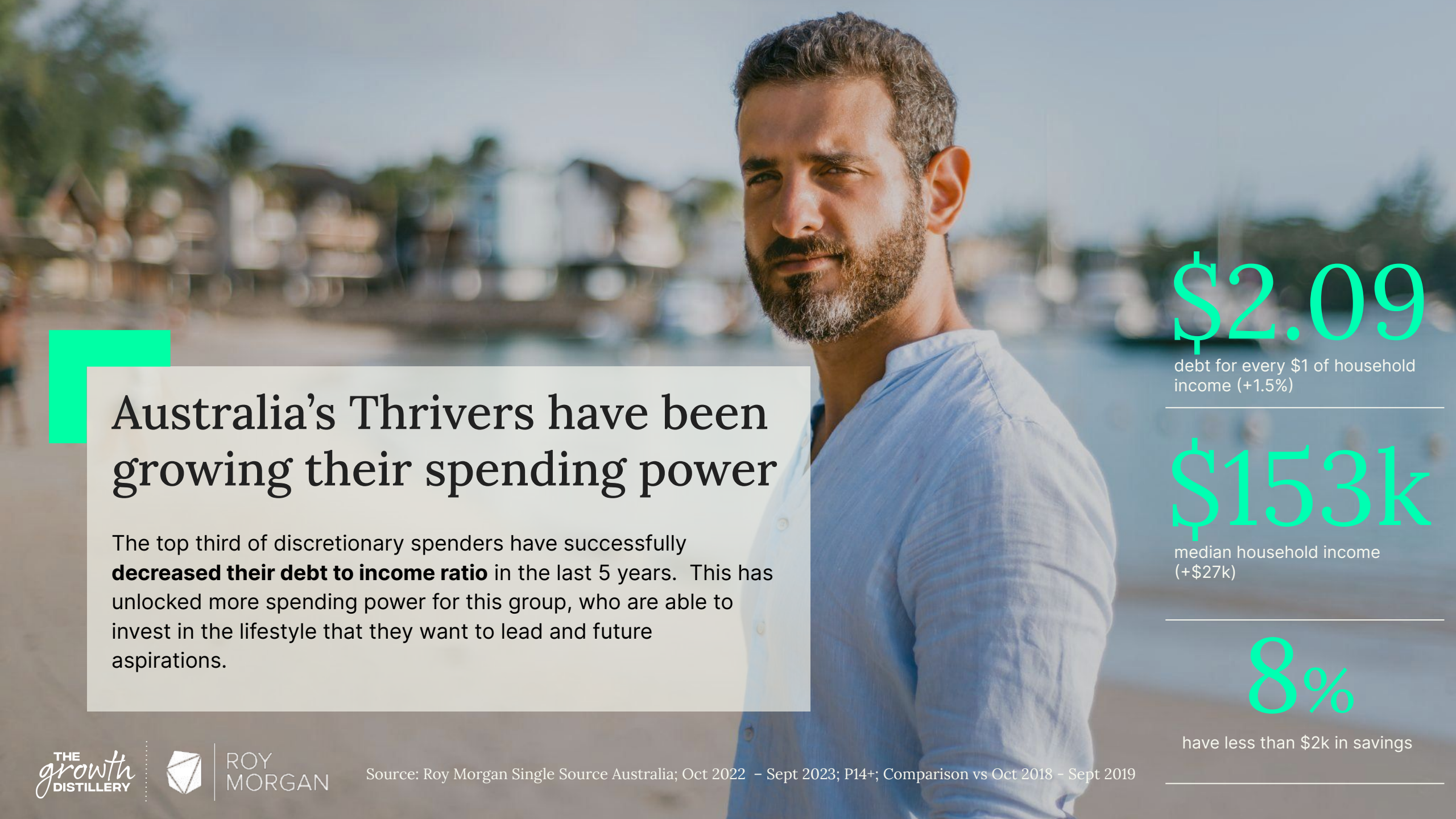
Thrivers

Top 1/3
of discretionary spenders



Strivers

Bottom 1/3
of discretionary spenders



Australia's Thrivers have been growing their spending power

The top third of discretionary spenders have successfully **decreased their debt to income ratio** in the last 5 years. This has unlocked more spending power for this group, who are able to invest in the lifestyle that they want to lead and future aspirations.

\$2.09


debt for every \$1 of household income (+1.5%)

\$153k

median household income (+\$27k)

8%

have less than \$2k in savings



\$2.55

debt for every \$1 of household income (+93%)

\$69k

median household income (+\$17k)

22%

have less than \$2k in savings

Australia's Strivers need help to escape a growing debt trap

The bottom third of discretionary spenders are struggling to make ends meet to cover the essentials, with little left over to spend on non-essentials. Their **debt to income ratio has grown by 93%** in the last 5 years, eroding their spending power and ability to afford unexpected expenses. This is having a huge impact on their lifestyle and future aspirations.

This inequality is making the security of the Great Australian Dream increasingly unreachable for Striving renters

While Strivers have been closing the gap on holding mortgages Thrivers remain 79% more likely to be mortgagees.

The real challenge is for those who haven't already jumped onto the property ladder. Renters from both cohorts dream of ditching the rent trap, with homeownership aspirations growing by 13-15% since 2019.

Renting Thrivers seem to have the escape hatch in sight. They're 53% more likely to be planning on purchasing or building property within the next year.

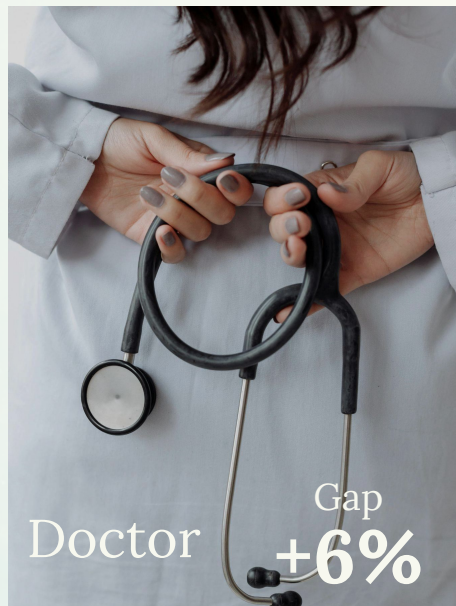




Feeling well and
in good health Gap
+2%



Fresh
meat Gap
+4%



Doctor Gap
+6%

And is escalating disparity in access to **health & wellness foundations.**

Thrivers are significantly more likely to agree that they feel well and in good health, which shouldn't come as a shock when Thrivers have better access and spending power to afford sports, healthcare and healthy food.

To put this into context, a couple of examples of where we're seeing widening gaps between Thrivers and Strivers:

In 2019 there was a 6% gap between how many people visited the doctor in the month prior - that gap has since doubled to 12% (54% of Thrivers visited the doctor last month compared to just under 42% of Strivers).

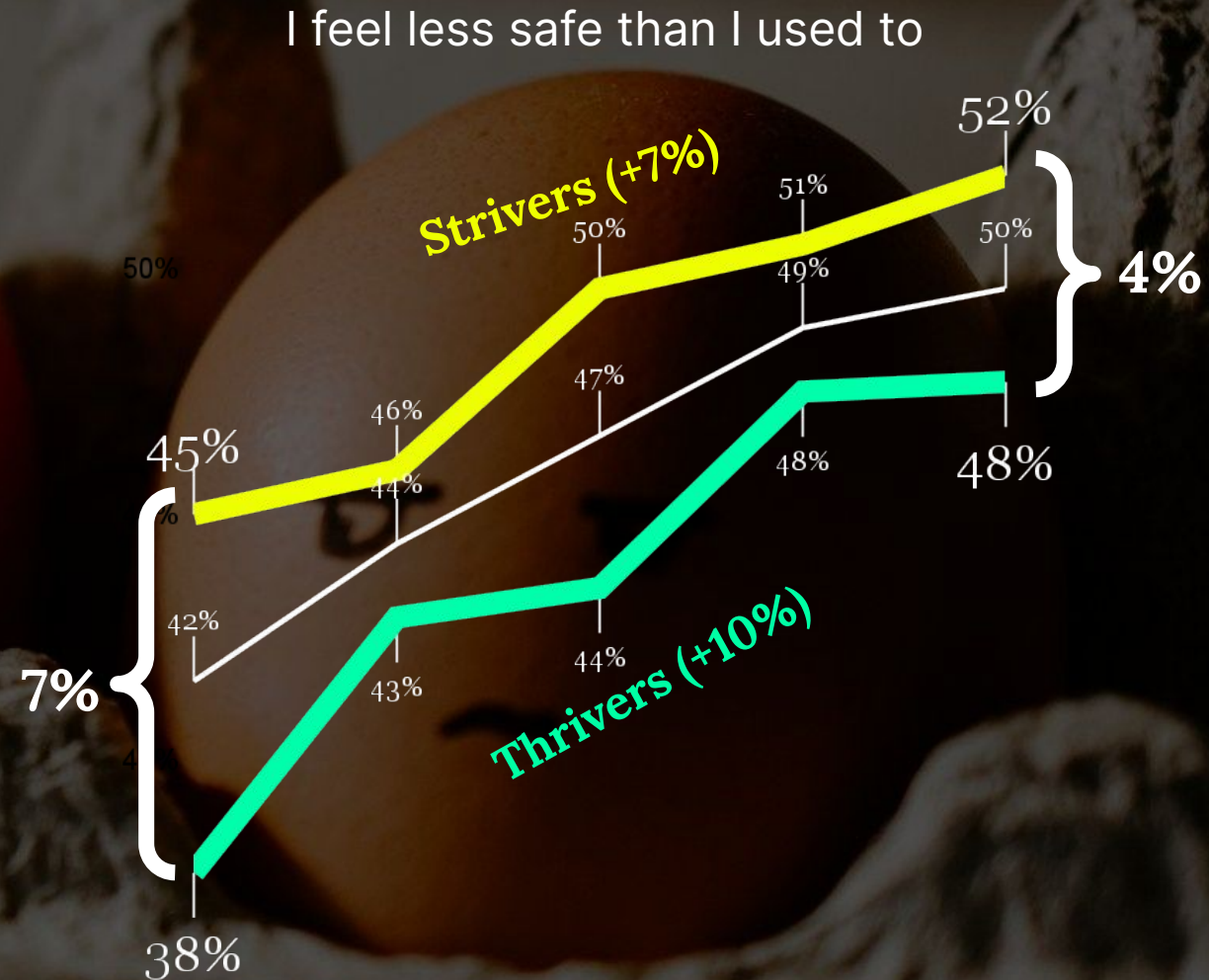
In 2019 there was a 16% gap between how many people had purchased fresh meat in the week prior - that gap has now grown to 20% - with 64% of Thrivers purchasing fresh meat vs just 44% of Strivers.

Thrivers' sense of safety has been **more rapidly eroded**

Australians are 8% more likely to agree that they feel less safe than they used to, with Thrivers growing this sentiment more rapidly than Strivers (+10% vs +7% respectively).

There has been a 17% growth in concern about crime, with 60% of Australians now concerned that crime is a growing problem in their community. Thrivers have shrunk the gap between them and Strivers by 10% in the last five years, showing how universal this concern now is.

Optimism is also under pressure - with just two-thirds feeling of us feeling optimistic about the future (-3%).





Strivers are
increasingly
disenfranchised
with government
– growing the
need for
advocacy

50%

don't trust

the current Australian Government (-4%)
Gap **+9%**

68%

believe that **corruption is one of**
the major problems facing the
country (+2%) Gap **-10%**

2x

more likely to be **undecided**
voters Gap **+3%**

An aerial photograph of a paved road winding through a dense, dark green forest. The road is straight and leads towards the horizon. The trees are thick and cover both sides of the road. The overall tone is dark and moody.

Growing wealth divide

What divides?

Spending power

Property

Access to health &
wellness foundations

Trust & scepticism

What unites?

Growing concern
about crime & corruption

Eroding sense of safety

Seeking moments
of joy & control



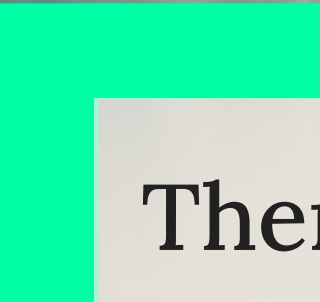

Our health is Under Pressure

An exploration of health & wellbeing

Amid growing health concerns – how do we help Aussies bridge the gap?

1 in 3

Do not agree that they are feeling well and in good health (▲10%)



**There is an escalating
mental health crisis - even
our most stoic generations
are being impacted**

49%

claim to be dealing
with a mental health
condition (□11%)

35% of Baby Boomers
(□4%)

35%

copied with anxiety
(□13%)

24%

engaging in risky
behaviour (such as
smoking, binge
drinking or binge
eating) (□8%)

We're looking for moments of joy, escape and control

At the same time as consumption of “hard news” has been under pressure, there has been growth in consumption of lighthearted content that allows a glimpse of these increasingly important moments.

+26%

Travel

+5%

Gardening

+3%

Food

+3%

Sport




Health & Lifestyle provide an ideal opportunity to **bridge the happiness gap**

With the top health and wellness aspiration for Australians simply “to be happy”[^], engaging with health and lifestyle content provides an opportunity to support and advocate for everyone to find their moments of joy and control, in spite of their discretionary income.

It's no wonder that consumption of lifestyle and health content has jumped so dramatically in the last 5 years.

+77%

Larger audience for
lifestyle & health
content



The metamorphosis of the family unit

An exploration of
growing family diversity



Growing family diversity is changing the support that is needed

Step and blended families now represent 12% of couple families, reflecting a 22% increase in the past five years.

Single-parent families have also increased by 13%, with a surge in men being the single parent, up by 48%.

The opportunity to deliver to these changing needs, will allow brands to support their changing customer base.

+22%

step & blended
families

+13%

single parents

+48%

single dads

The idea of **home** has evolved

Multigenerational living is booming, with a 22% surge in 3-generation households in just five years[^].

Adult children living at home continues to increase (+3%), with Thrivers most likely to report it versus other cohorts.

More Australians are sharing the household's financial burden. One-half of main income earners now have multiple income sources within their household, compared to 56% relying solely on a single income five years ago.



+22%

3-generation
households[^]

Source: Roy Morgan Single Source Australia; Oct 2022 – Sept 2023; P14+;
Comparisons vs Oct 2018 – Sept 2019 ^ABS Census 2021 vs 2016

The growth in the **queer community** is not “a Gen Z thing”

Growth in the queer community bridges generations, with 16% Australians now identifying as homosexual, gay, lesbian or bisexual - that's a 66% growth since 2019.

And it's not just a “Gen Z thing”, as some might have you believe. Gen X has actually experienced the most significant growth up by 87%, with Baby Boomers growing by 51%.

Additionally, queer families are flourishing, with 27% of the community now parents, representing a 63% jump.

16%

of the population
identify as LGB[^]

+46%

Gen Z

+87%

Gen X

+51%

Baby
Boomers

+63%

are
parents



Embracing
inclusive language and
acknowledging the diverse experiences of
Australians can **foster**
deeper connections and engagement.



The same age 5 years ago

How attitudes by age have shifted
in 5 years

14-17 year-olds

Increasingly risk averse and redefining success

Safety and security are top concerns for today's teens - making them more risk-averse than their counterparts just 5 years ago.

Work-life balance is rising, as the importance of responsibility in jobs has decreased (-11%). Similarly, the pursuit of success is less motivating than before (-10%).

Cooking and regular sports participation have fallen out of favour, replaced by a preference for eating out and avoiding strenuous physical activity.

46% (-19%)
believe in taking risks

63% (-10%)
success is important to me

44% (+13%)
would eat out every night if they could afford it

18-24 year-olds

40% (+11%)

CHOOSING WORK OVER STUDY

71% (+5%)

VALUE JOB SECURITY OVER
HAVING JOB RESPONSIBILITIES

24% (+8%)

MORE LIKELY TO BE SEEKING
SPIRITUAL FULFILLMENT

More cautious and concerned in outlook but remain hedonistic in their actions.

Today's young adults are seeking stability and safety in their lives.

52% like things to stay the same (+13%). Nearly half of young adults are feeling less safe (+11%), which is compounded by one-third struggling with depression (+10%).

They are more insular in how they live their life, and are aware of their limits. Two in 5 say they would have difficulty coping with a demanding job/career (+13%). Only 45% intend to travel in the next year (-17%).

Hedonistic behaviours are still prevalent. More are drinking on a monthly basis (+10%), but drinking less on average (from avg 23 to 18 drinks per month). Vaping has skyrocketed by 7.4 times (22% vaped last month). Gambling amongst males has doubled in the last 5 years.

25-34 year-olds

Credit reliant with a focus on self-identification

They are grappling with new economic realities and could use some guidance to bridge the gap from perception vs reality. While projecting confidence in managing their money (63%), a closer look reveals a growing reliance on credit (+17%).

Their **financial reality is also having an impact on their eco-conscious desires**, with 75% finding environmentally friendly products overpriced (+10%)

23% now identify as queer[^] which has grown by 10% compared to their counterparts in 2019.

45% (+17%)

credit enables me to buy the things that I want

75% (+10%)

environmentally friendly products are overpriced

23% (+10%)

consider themselves to be homosexual, gay, lesbian or bisexual



67% (+5%)

believe there is not
enough hours in the day

38% (+11%)

would have difficulty
coping with a demanding
career

48% (+10%)

believe schools don't
prioritise academic
achievement enough

35-49 year-olds

Juggling priorities while pressured for time and money

They are **struggling with work life balance**, increasingly time poor (+5%) and more likely to have difficulty coping with a demanding career (+11%).

Financial pressures are impacting them - while they continue to make up the largest proportion of Thrivers this has declined by 4% since 2019.

And they are **concerned about their children's futures** - with almost one-half now agreeing that secondary schools don't prioritise academic achievements enough (+10%)

50-64 year-olds

Embracing technology & redefining health

Actively embracing new technology, with a 9% growth in those who go out of their way to learn everything they can and they're more likely to consider doing their grocery shopping online (+20%).

Taking a more relaxed approach to diet with a decline in those who restrict fattening foods (-9%), although one-in-two still claim to be constantly watching their weight (+3%)

The most trusting of the Australian Government of any age group - with distrust declining by 12% - but 47% still don't trust them suggesting there is an advocacy job to be done

37% (+9%)

go out of their way to learn everything they can about new technology

55% (-9%)

restrict how much fattening food they eat

47% (-12%)

don't trust the current Australian Government



50% (+23%)

Computers and
technology give me more
control over their life

57% (+19%)

regularly delete cookies

45% (+21%)

like to shut themselves off
from the world when
they're at home

65+ year-olds

Increasingly tech savvy but wanting connection on their own terms

Computers and technology give them more control over their lives (+23%) but they're looking for balance and sometimes just need to disconnect from technology (+6%). They're also security conscious and regularly delete cookies (+19%).

But they **still need support navigating the world of technology**, with 76% admitting that it's hard to keep up with how rapidly technology changes (-7%)

They also have a **growing bunker mentality** - 45% agree that when they're at home they like to shut themselves off from the rest of the world (+21%). This is the fastest growth of any age group.



Divergent Priorities

How regional and metro attitudes
continue to grow apart

Metro residents



It is important to
have a full social
life

Gap **+10%**

I need a mobile phone to
help juggle my work and
personal life

Gap **+8%**

Source: Roy Morgan Single Source Australia; Oct 2022 – Sept 2023; P14+;
Comparison vs Oct 2018 – Sept 2019; Gap vs Regional residents

Gravitating to **socialisation** and **technology**

Metro residents are **embracing socialising** again with 44% stating that it is important to have a full social life (+4%) with 70% wanting to make the most of today since they don't know what the future holds.

They have a growing **reliance on computers and technology to give them more control** over their lives (+13%), relying on a mobile phone to help them juggle work and personal lives (+13%).

They're also **looking for more security** in their jobs (+6%) while also relying on their mobile phone for their own personal security (+19%)

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Feeling unsafe and forgotten

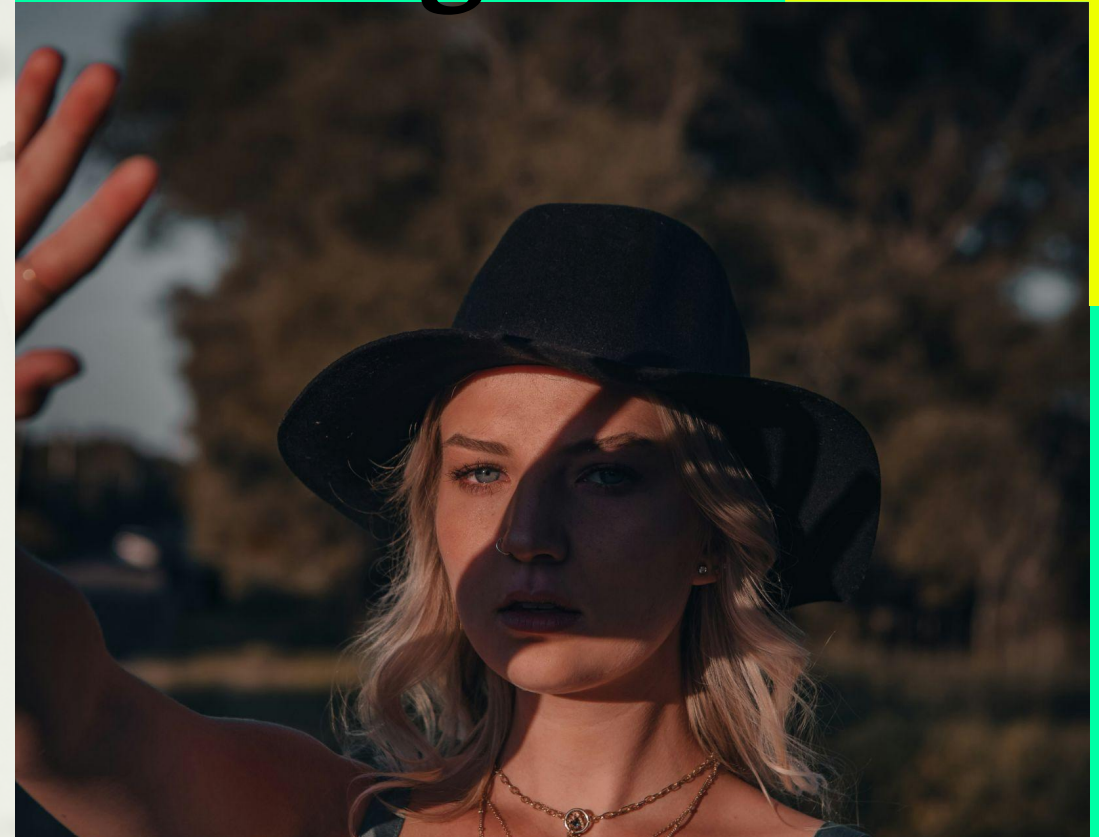
Security and Values: They express greater concern about rising crime (+7%) and believe the fundamental values of the country are under threat (+3%).

Government Trust: While both regional and metro residents show improved trust in the government, regional Australians are lagging. They are 8% less likely to trust the Government, with the gap to metro growing by 4%.

Globalization and Local Support: Regional residents have a stronger preference for Australian-made products (5%), and raise concerns about globalization's impact.

Seeking Solitude: They are more likely to disengage from the outside world at home (+16%) and don't want to know too much about what's going on (+7%)

Regional residents

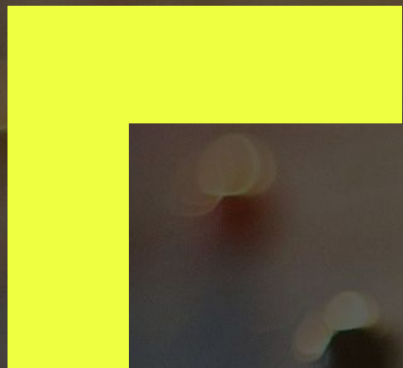


I don't trust the
current Australian
Government

Gap +4%

Crime is a growing
problem in my
community

Gap +3%



A Nation of Nations

A five-year comparison of the state shifts



NSW

Health conscious, education focussed **risk takers**

Health consciousness is surging in NSW, with 64% of residents actively seeking weight loss (+3%). Plant-based diets are also finding favor, with 19% embracing vegetarianism (+7%).

Secondary education priorities are a growing concern for residents. 51% worry about a lack of emphasis on academic achievements (+11%).

On a positive note, **confidence in taking risks is rising**. 43% of residents now agree they believe in taking risks (+4%).

19% (+7%)

eat mostly, or
wholly, vegetarian
food

51% (+11%)

secondary schools
don't place enough
emphasis on academic
achievements

43% (+4%)

believe in
taking risks

Embracing an active and connected lifestyle

Victorians are embracing their social butterfly era - agreeing that a full social life is important (+7%) and that they enjoy spontaneous entertaining (+6%).

However they are increasingly wary of authority, with concerns about corruption growing by nearly 10%. Globalization also faces skepticism, with 57% believing that it creates more problems than solutions (+9%).

A notable shift sees 31% agreeing that **freedom is more important than the law** (+10%).

45% (+7%)

believe a full social life is important

65% (+10%)

corruption is one of the major problems facing the country

31% (+10%)

believe that freedom is more important than the law



Qld

75% (+17%)

crime is a growing
problem in my
community

54% (+11%)

feel less safe
than they used to

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Source: Roy Morgan Single Source Australia; Oct 2022 – Sept 2023; P14+;
Comparison vs Oct 2018 – Sept 2019

Security conscious with an independent spirit

Queenslanders have seen a **concerningly rapid growth in concern about crime and security** in their community. A significant 3 in 4 Queenslanders believe that crime is a growing problem in their communities (+17%).

It's unsurprising then that they are **increasingly security conscious** and are the state that is most likely to agree that they feel less safe than they used to (54% agree, which is up by 11%).

Queenslanders are also the **least likely to trust the Federal Government** of any Australian state (51% distrust).

51% (-5%)

don't trust the
current Australian
Government

Prioritising value and home comforts

South Australians have become increasingly bargain savvy - with 68% reporting not buying luxuries anymore (+12%) and more than three-in-five actively seeking bargains (+19%).

They crave seclusion, with 58% agreeing they like to shut off from the world when at home (+19%). Additionally, 35% of South Australians don't like to know too much about what's going on in the world these days (+11%).

At the same time, they are **increasingly appreciative of traditional family meals** (+10%).

61% (+19%)

actively seek bargains

58% (+19%)

like to shut off from the world when they are at home

70% (+10%)

like to have traditional family meals at home

SA

WA

Feeling financially secure and passionate about food

56% of West Australians **feel financially stable** at the moment (+1%), making them the most confident in the country. While credit is becoming increasingly important in enabling them to purchase what they want (+16%), they feel confident in managing their finances (+1%). This growth is significant given national financial stability and confidence has been eroded.

Their **taste buds have ignited** with 84% now enjoying food from around the world (+11%). 59% now believe that taste is more important than ingredients (+15%).

56%

(+1%)

feel financial stable

39%

(+16%)

credit enables them to
purchase the things
that they want

84%

(+11%)

enjoy food from all
over the world

Embracing environmental sensibilities while looking for security

Tasmanians are **growing their environmental connection** with two-thirds now agreeing that they are environmentalists at heart (+4%).

They are **increasingly looking for security** in both their job (+13%) and also financial investments (+8%). Over three-quarters like to be well-insured (+11%). 75% also feel confident in managing their finances (+3%).

More than one-half of Tasmanians believe that **the Federal Government is doing a good job** running the country, which is a huge improvement on 5-years ago (+21%).

67% (+4%)

environmentalists
at heart

62% (+13%)

need security in
their job

77% (+8%)

prefer to invest in
something with a safe
return

NT

Focussed on success with an **increasing bunker mentality**

Success is becoming increasingly important for Territorians (+14%), but at the same time they're struggling to find enough hours in the day (+11%).

They have a **growing bunker mentality**, with almost two-thirds agreeing that when they are at home, they like to shut themselves off from the rest of the world (+31%).

56% (+14%)

state that success is important to them

65% (+11%)

there's not enough time in the day

65% (+31%)

like to shut myself off from the rest of the world



The wrap-up

Key points to remember

REMEMBER

While discretionary income might divide us,
some needs are universal

Health and lifestyle
provide an ideal opportunity to **bridge the happiness gap**

Inclusive language helps to engage and address the unique challenges faced by Australians

Leave assumptions at the door - we are all very different from who we were in 2019



Thank You