

HEARTBEAT 2026

REGIONAL AUSTRALIAN SENTIMENT & WELLBEING

Now in its 5th year, the Heartbeat study is one of the largest ongoing investigations into regional Australian sentiment. It explores how regional communities stay connected, what drives their sense of belonging, what issues concern them, and how their overall wellbeing compares to urban counterparts.

The Research

Format: 20-minute representative online survey

Sample Size:

- Regional : n=5,675
- 5 major state capitals: n= 1,322

Conducted by Australian Regional Insights in conjunction with the University of Canberra and ACM.

The highlights

Higher life satisfaction

Regional Australians report higher satisfaction across every aspect of their personal lives and circumstances compared to capital city residents. This strong foundation appears to buffer day-to-day pressures—regional respondents consistently report feeling less stressed, anxious, frustrated, and pessimistic about the future than their urban counterparts.

Widespread caution regarding the future

Despite baseline satisfaction, Australians across the board view the future with caution with half of regional, and a third of capital city audiences believing the next 12 months will be less positive.

Stronger community connection & belonging

Regional residents demonstrate a significantly stronger sense of community connection and belonging. Key drivers include shopping locally, staying informed through local media, and active community participation. Regional Australians are far more likely to describe their communities as great places to live, welcoming and supportive and resilient when times are tough.

Established media drives drives connection

Regional Australians rely heavily on established media channels to stay informed, showing significantly higher engagement and trust in local news sources than capital city audiences. They want to know what's going on in their local area and understand the things that might affect them.

Consumer spending intentions

- **Domestic Travel:** Regional Australians are significantly more likely to plan a domestic trip in the next 12 months, with two-thirds of all Australians planning travel of some kind.
- **Retail & Tech:** Regional consumer purchase intent matches major capital cities across furniture, household appliances, and technology.
- **Automotive:** Regional buyers show a marked openness to electric vehicles (EVs) and hybrid models.

