

True Issues 18

March 2019



Government performance steady and national economy heading in better direction than in lead-up to 2016 election



Australian Government's performance rating unchanged under PM Scott Morrison

As the Federal Budget and Election looms, the Australian Government's performance rating remains unchanged since November 2018 at an index score of 43, although this is similar to public sentiment leading into the 2016 Federal Election (index of 44, May 2016), which the Coalition won.

Currently, only one in five (23%) Australians rate the Government's performance as 'very good' or 'good'. More than a third (34%) rate it as 'very poor' or 'poor' and the largest proportion of the electorate (40%) continue to rate the Government's performance as 'average'.

Despite the steady national trend since last November, there are some key shifts in sentiment by age and location. While there has been improvement among older adults aged 55+ (performance index 43 up from 37), and Queenslanders (46 up from 40), overall opinion among millennials has soured somewhat (45 down from 52).

Australians continue to rate the performance of business and industry (index 52) and their Local (49) and State/Territory (45) Governments higher than the Federal Government. Victorians are most positive about their State Government (index 51, significantly higher than the national average).

More Australians feel their personal situation is headed in the right direction

Australians' overall optimism about their own personal situation has rebounded somewhat since November 2018. Significantly fewer feel they are headed in the wrong direction (17% down from 23%) and slightly more feel they are now headed in the right direction (33% up from 31%). This produces an upswing in net direction rating from +8 to +16, and positive sentiment more similar to April and August last year (+24 and +19, respectively).

Direction of the national economy slightly improved, better than in lead-up to 2016 election

While the net direction rating of the national economy has improved only slightly since November 2018, from -11 to -8 points, this is substantially more positive than community opinion prior to the last Federal Election when a -17 net direction rating was recorded in May 2016.

The net direction of state and territory economies is little changed from -11 to -10, however confidence in business and industry has tipped slightly into the negative since November, from a net direction rating of +1 to -1.

Healthcare and ageing most important, border security and environment more top-of-mind than cost of living



Concerns about health and ageing, immigration and borders, and the environment are top of mind

Following the recent Adelaide hearings of the Royal Commission into Aged Care Quality and Safety, issues around aged care are top of mind, in addition to mental health, health funding and the NDIS. When asked to name up to three issues that personally interest or concern them the most that the Australian Government should focus on, 29% of Australians describe issues related to hospitals, healthcare and ageing.

Almost one in four (23%) raise concerns about immigration and border security. Amid ongoing public discussion of the 'Medivac Bill', issues around border protection, illegal immigrants and refugees are top of mind, in addition to broader concerns about immigration.

Two in ten (19%) Australians are concerned about the environment, including 10% who specifically mention issues around climate change and global warming.

Employment and wages (18%), the economy and finances (17%) and education, training and childcare (16%) follow closely. Interestingly, when asked to name concerns without being prompted by a list of issues, cost of living is a less pressing concern than these other key issues, mentioned by just 14% of Australians.

Cost of living concerns subside as hospitals, healthcare and ageing re-emerges as most important

After peaking as the most important issue in November 2018, cost of living has fallen behind hospitals, healthcare and ageing (unchanged at 60%) as Australians' top prompted priority for Government attention. This decline for cost of living is line with a rebound in Australians' confidence in their personal situation. Similarly, housing and interest rates (down 4 points to 25%) and defence, security and terrorism (down 6 points to 23%) are now lower priorities, returning to August 2018 levels after peaking last November.

Women (67%) and older adults (73%) are more likely to rate hospitals, healthcare and ageing as an important issue for the Government to focus on, while cost of living remains the leading issue among Generation X (64%), those aged 35 to 54 years.

Employment and wages (40%), immigration and border security (36%), and economy and finances (36%) continue to round out the top five most important issues. These issues are followed by the environment (33%), education, training and childcare (32%) and energy (30%). These overall rankings contrast top-of-mind mentions, where immigration and environment are far more prominent concerns.

Government performs well on areas of lower immediate priority to Australians



Australian Government continues to perform best on defence and worst on cost of living and vision

Government performance is steady across all key areas, with defence, security and terrorism still its best-performing area at a performance index score of 56.

The Government also continues to perform reasonably well on areas of lower public priority, such as business and industry (51), foreign affairs and trade (51) and mining and resources (50).

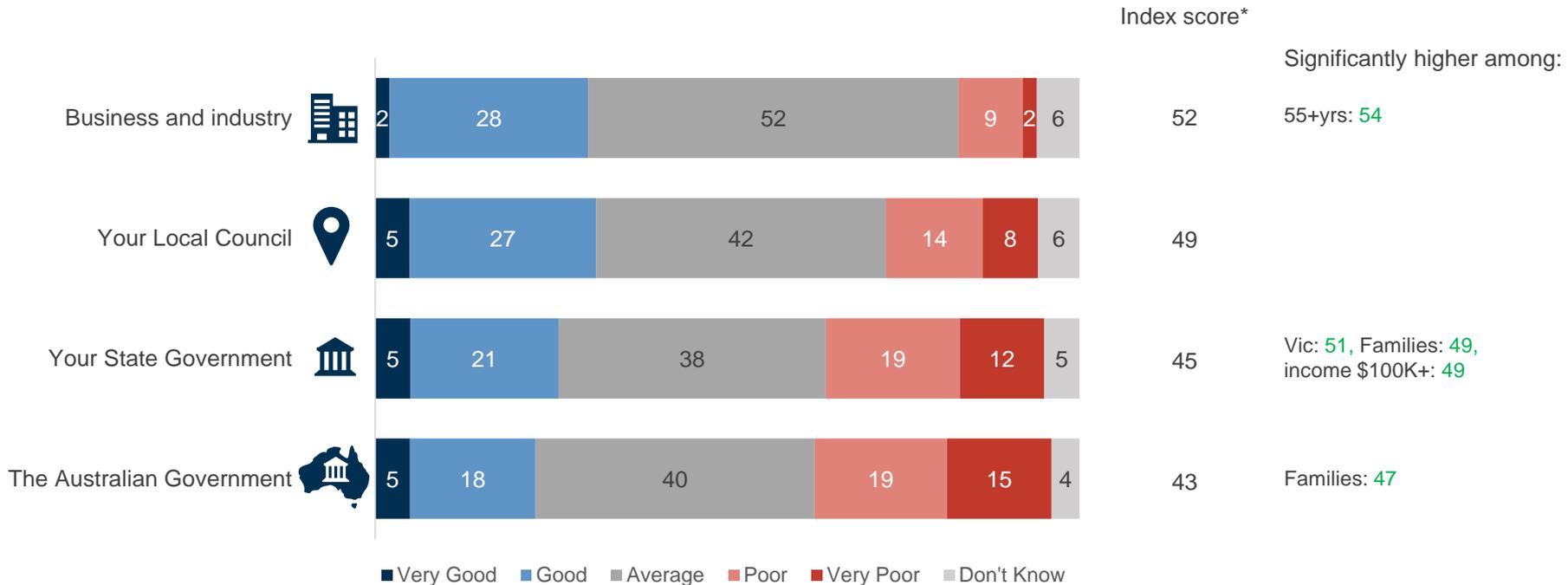
Aside from a small dip in performance on defence in November (index 54 down from 59), which has since seen some improvement, there have been no other significant shifts in Government performance ratings on any issue since the August 2018 survey, fielded in the final weeks of Malcolm Turnbull's Prime Ministership.

The most top-of-mind concerns for Australians rank among this Government's worst performing areas – cost of living (index of 35), the environment (41), and hospitals, healthcare and ageing (41).

Business outperforms governments as more view Federal and State Government performance as poor than good



Performance of organisations and groups in Australia (%)



Significantly higher than the national total at the 95% confidence interval.

Q. How would you rate the current performance of each of the following organisations or groups in Australia?

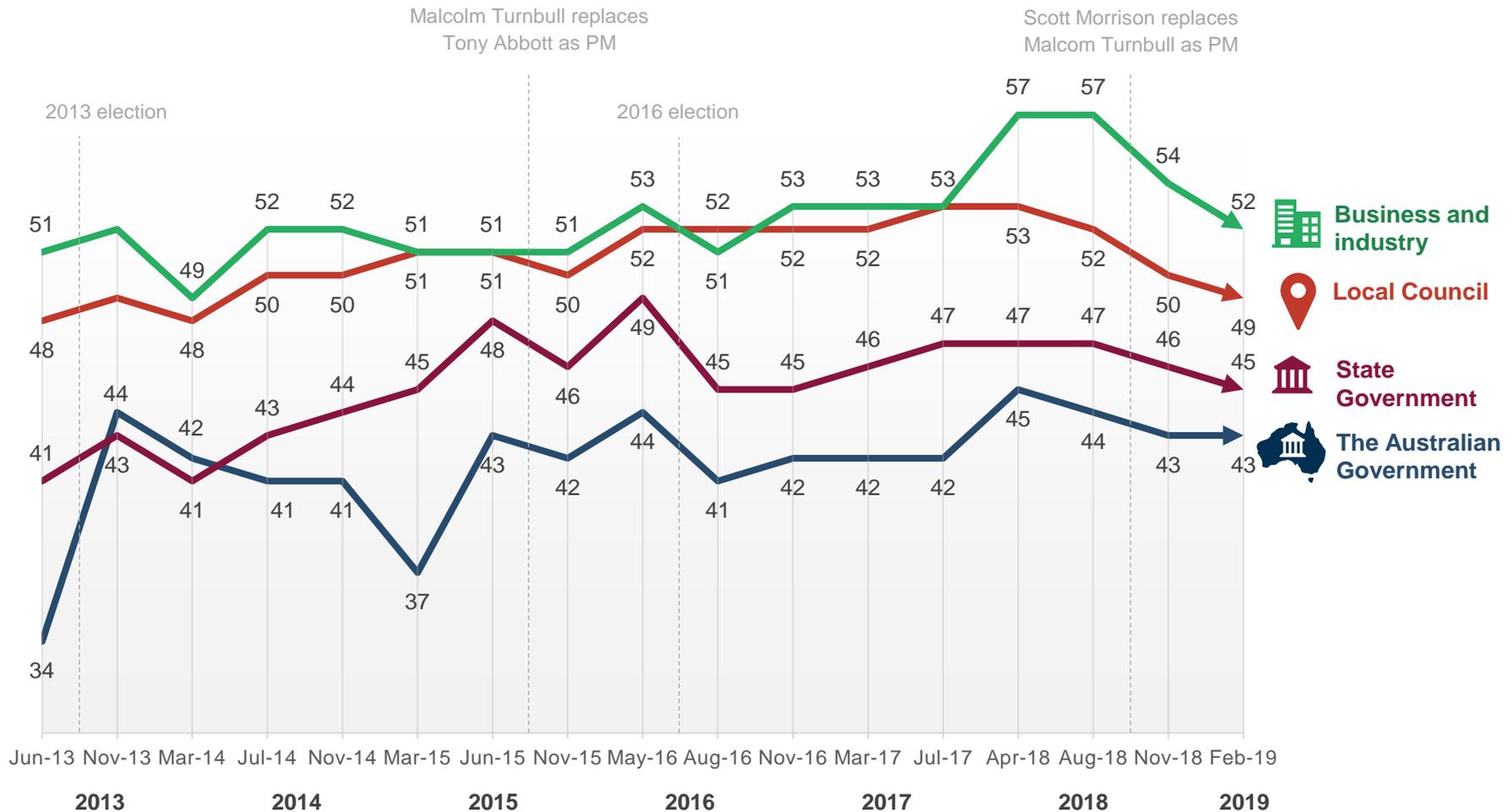
Base: All respondents (n=1,000).

* For an in-depth explanation of how index scores are calculated refer to the research methodology section of this report.

Australian Government performance stable but still lags behind that of business and State and Local Government



Performance of organisations and groups in Australia
Index score trend*



Q. How would you rate the current performance of each of the following organisations or groups in Australia?

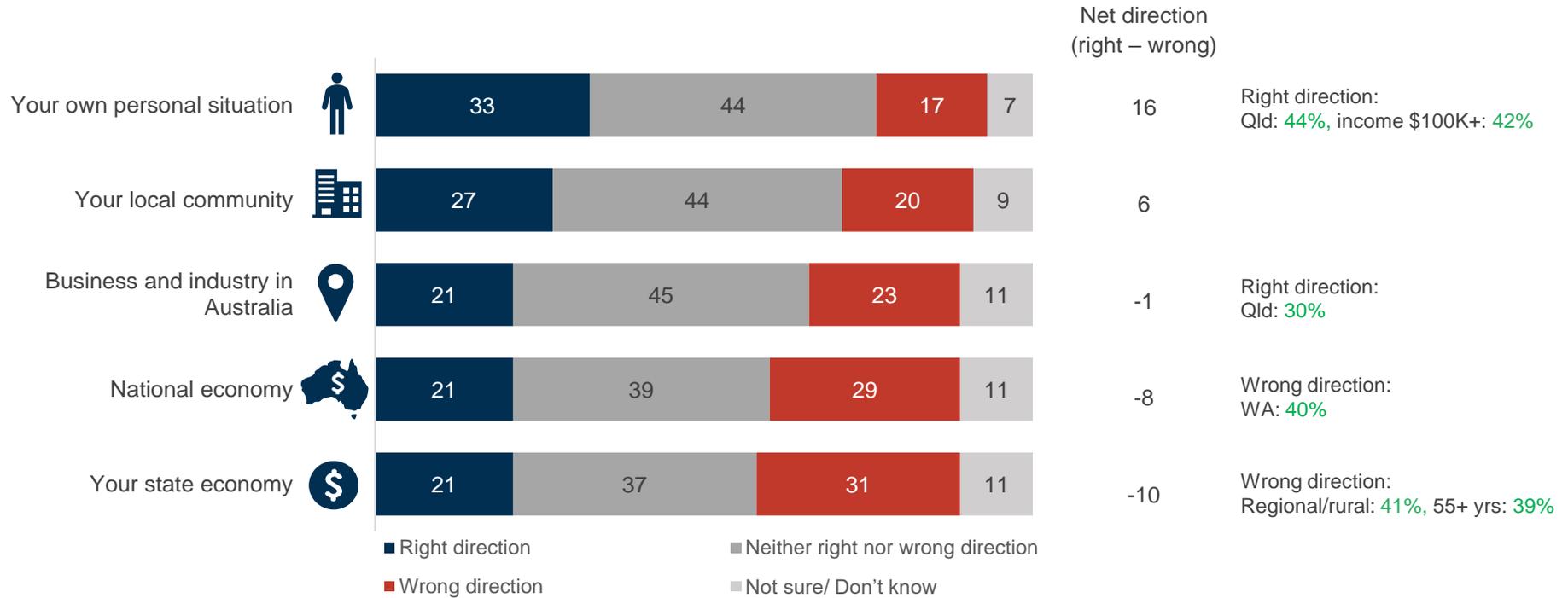
Base: All respondents (n=1,000).

* For an explanation of how index scores are calculated refer to the research methodology section of this report.

Australians more confident about their own future than for business and national and state economies



Direction of organisations and groups in Australia (%)



Significantly higher than the national total at the 95% confidence interval
 Q. Do you think each of the following is generally headed in the right or the wrong direction?
 Base: All respondents (n=1,000).

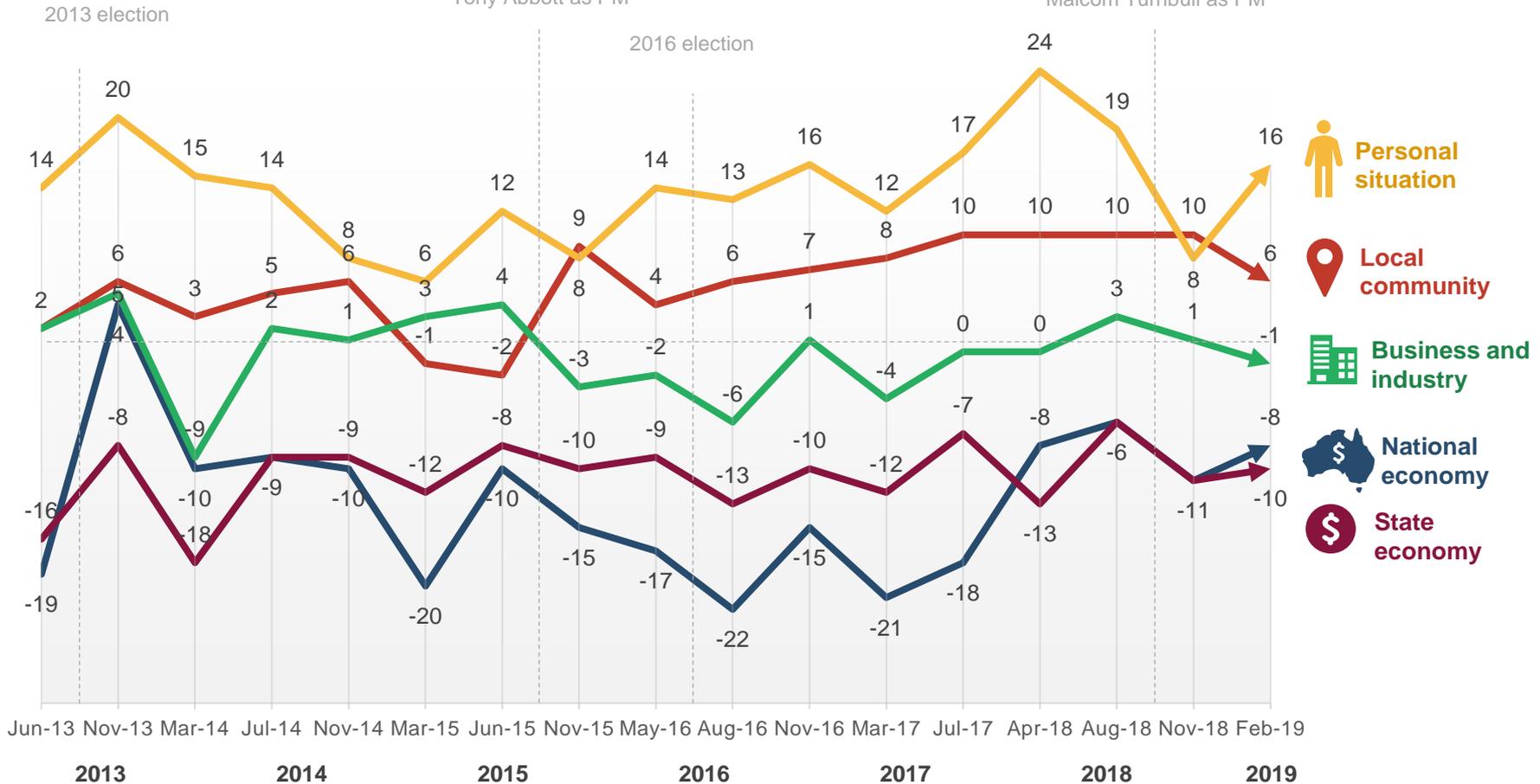
Australians more optimistic about their personal situation in 2019, and slightly more optimistic for national economy



Direction of organisations and groups in Australia
 Net direction trend (right direction % – wrong direction %)

Malcolm Turnbull replaces
 Tony Abbott as PM

Scott Morrison replaces
 Malcom Turnbull as PM

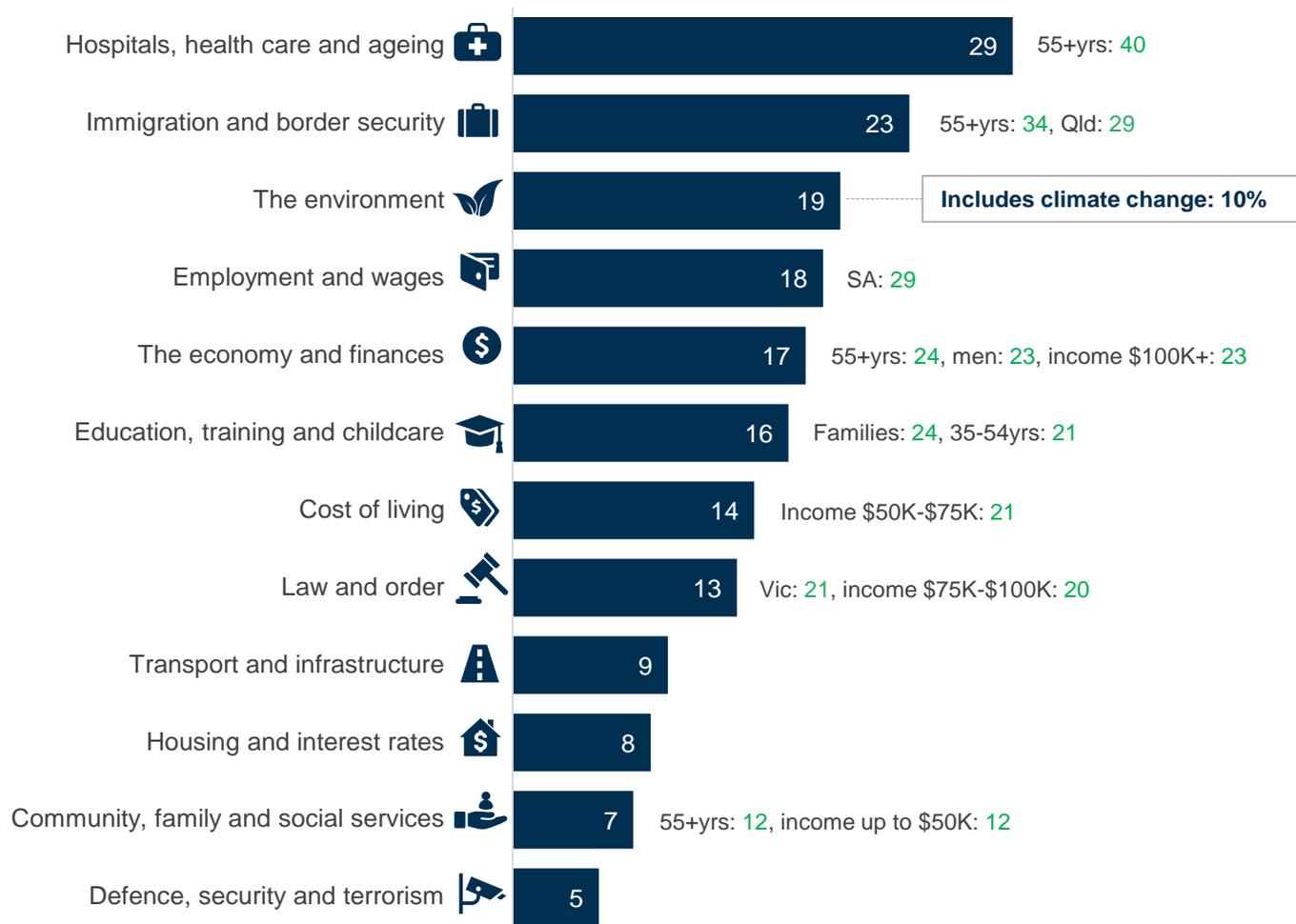


Q. Do you think each of the following is generally headed in the right or the wrong direction?
 Base: All respondents (n=1,000).

Healthcare and ageing, immigration and border security and the environment are Australians' top of mind concerns



Most important issues the Australian Government should focus on (%) (Top 3 most important – unprompted)



Significantly **higher** than the national total at the 95% confidence interval.

Q. What are the most important issues that you think the Australian Government should focus on? These would be the issues or problems that personally interest or concern you the most.

Base: All respondents (n=1,000).

COL concerns subside, leaving hospitals, healthcare and ageing as again the top issue for Australians



Most important issues the Australian Government should focus on (%)

(Top 5 most important – prompted)



Significantly higher / lower than previous wave at the 95% confidence interval.

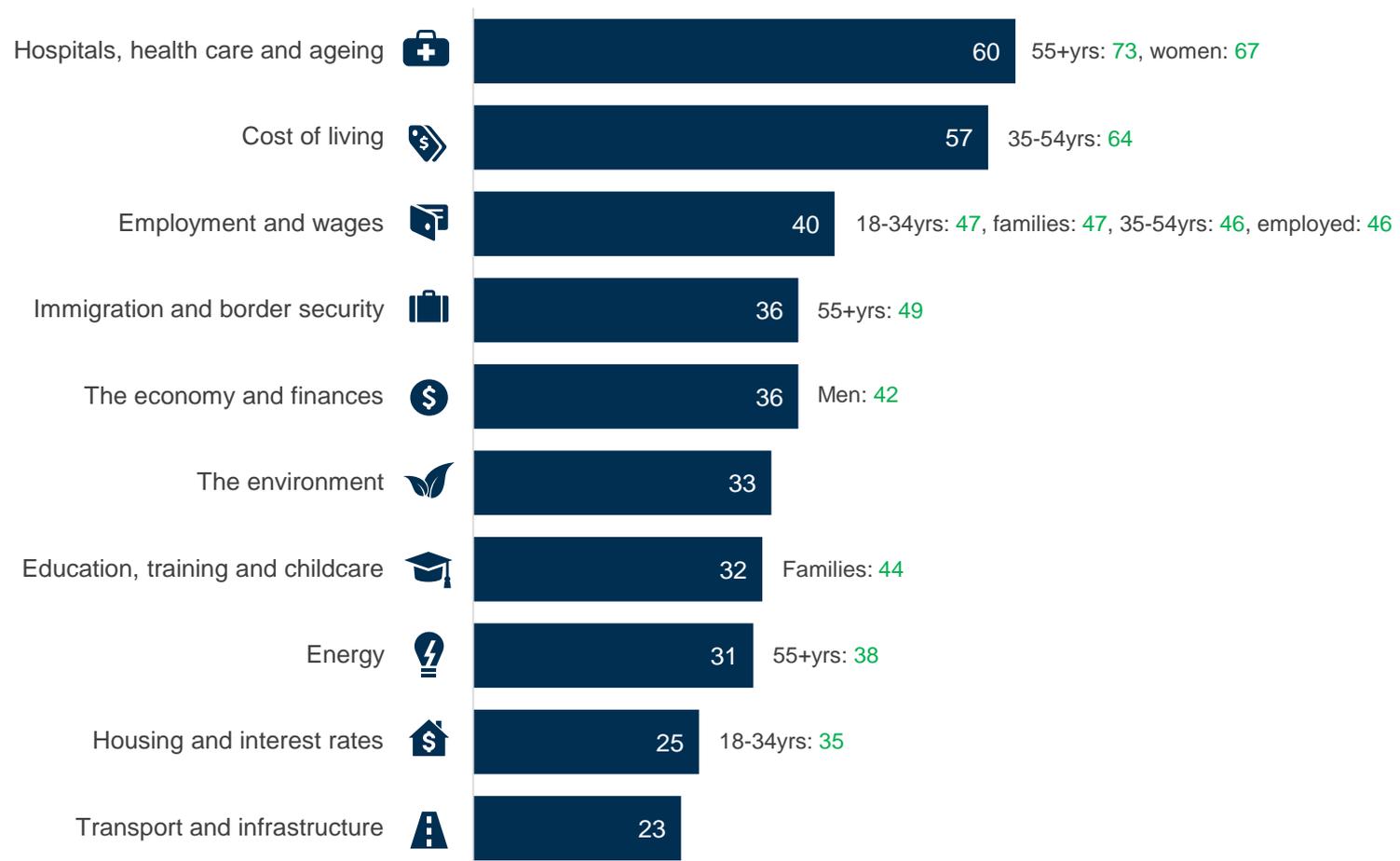
Q. From the following list, please select the five most important issues you think the Australian Government should focus on.

Base: All respondents (n=1,000).

Concerns about cost of living and employment and wages continue to dominate among Generation X (35-54 years)



Ten highest ranked issues the Australian Government should focus on (%)
(Top 5 most important – prompted)



Significantly *higher* than the national total at the 95% confidence interval.

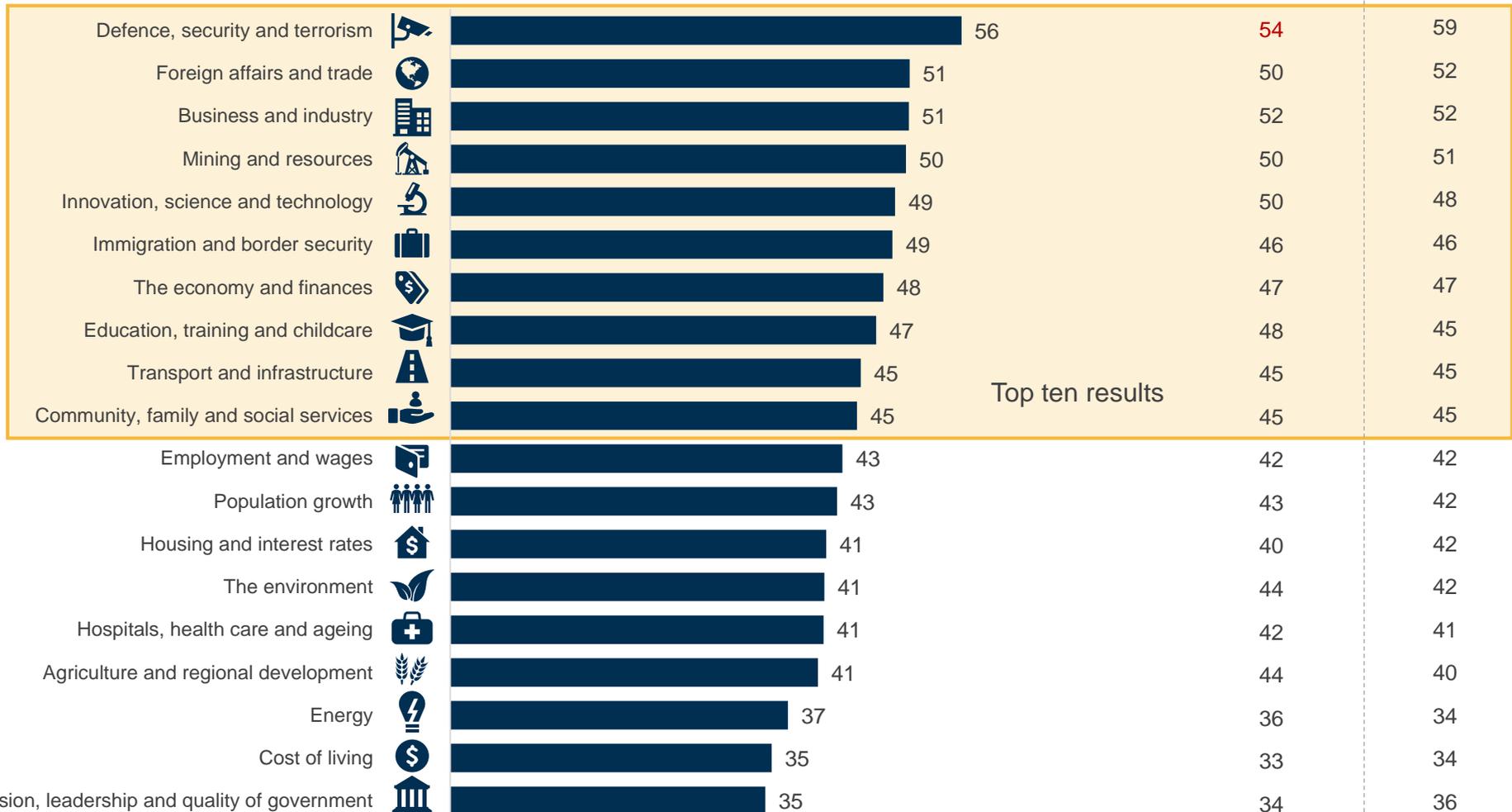
Q. From the following list, please select the five most important issues you think the Australian Government should focus on.

Base: All respondents (n=1,000).

Australian Government continues to perform best on defence and worst on cost of living and vision, leadership



Australian Government performance on issues (Performance index*)



Significantly lower than previous wave at the 95% confidence interval.

Q. How would you rate the performance of the Australian Government on each of the following issues?

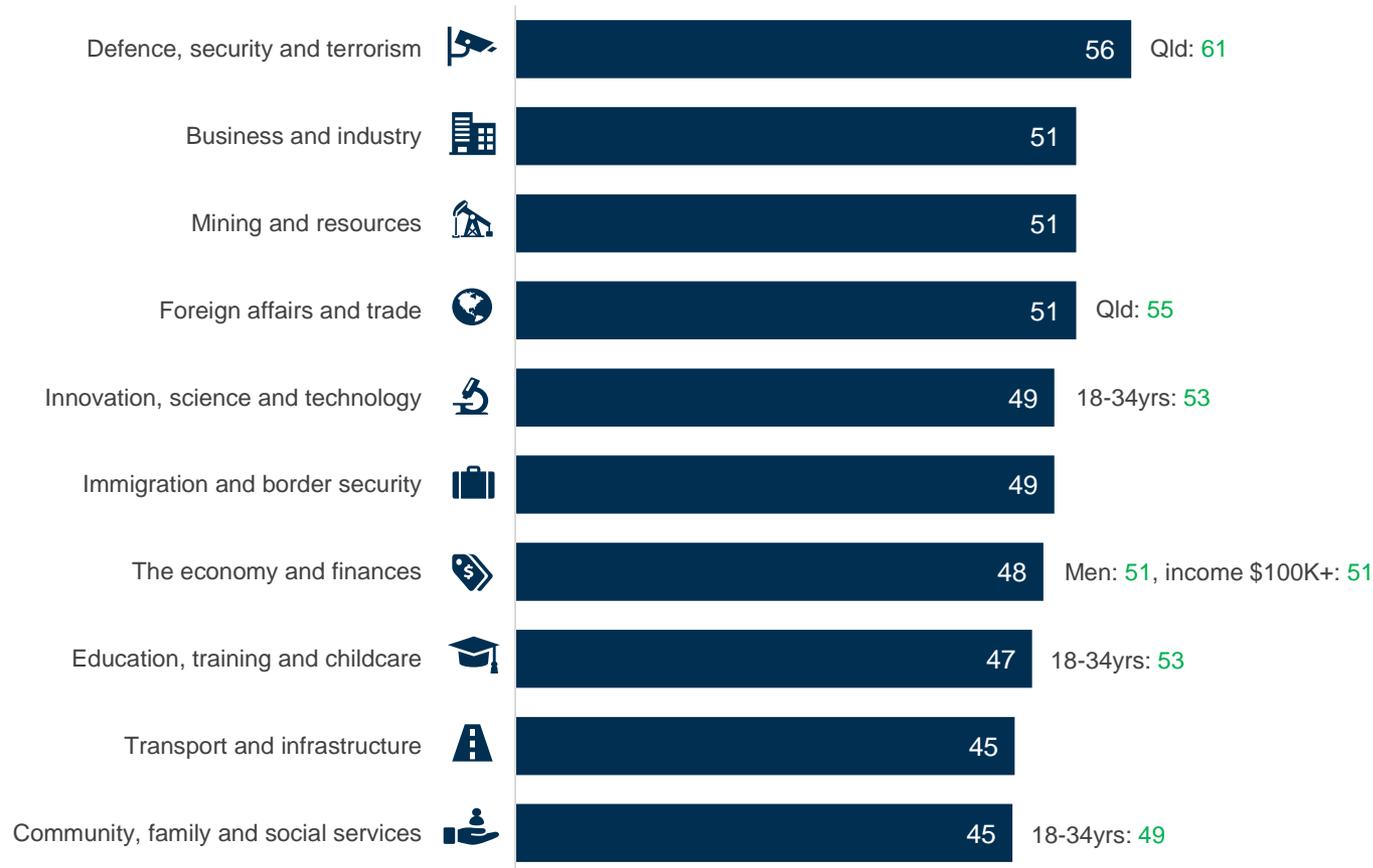
Base: All respondents (n=1,000).

* For an explanation of how index scores are calculated refer to the research methodology section of this report.



Millennials rate Government performance higher on innovation, education and community services

Top ten ranked issues for Australian Government performance (Performance index*)



Significantly **higher** than the national total at the 95% confidence interval.

Q. How would you rate the performance of the Australian Government on each of the following issues?

Base: All respondents (n=1,000).

* For an explanation of how index scores are calculated refer to the research methodology section of this report.

Research methodology



Quantitative Online Survey

n=1,000 Australians

- Survey quotas on age, gender and location, and weighting applied at the analysis stage to actual age/gender/location proportions based on ABS census data.
- The maximum margin of error on the total sample of n=1,000 is +/-3.1% at the 95% confidence level.
- Differences of +/-1% for net scores are due to rounding.
- Conducted 21st – 25th February 2019.

Explanation of index scores

Some questions rate performance on a five-point scale, for example, from 'very good' to 'very poor', with 'don't know' also a possible response category. To facilitate ease of reporting and comparison of results over time, an 'index score' has been calculated for such measures.

The index score is calculated and represented as a score out of 100 (on a 0 to 100 scale), with 'don't know' responses excluded from the analysis.

The 'survey percentage result' for each scale category is multiplied by an 'index factor'. This produces an 'index value' for each category, which are then summed to produce the 'index score', equating to '43' in the following example.

Rating category	Survey percentage	Index factor	Index value (percentage x factor)
Very good	5%	100	5
Good	18%	75	14
Average	40%	50	20
Poor	19%	25	5
Very poor	15%	0	0
Don't know	4%	0	0
Index score			43

**THERE ARE
OVER
25 MILLION
PEOPLE
IN AUSTRALIA...**

**FIND OUT
WHAT THEY'RE
THINKING.**



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