



political OVERVIEW



Michele Levine has more than 30 years' experience as a researcher and has been responsible for thousands of surveys, including many of the largest research projects ever undertaken in Australia, many of which continue to play a critical part in shaping our society today.

With a fundamental belief in the empowering value of information, Michele was instrumental in the development and refinement of Roy Morgan Single Source, the world's leading consumer study (based on over 50,000 interviews a year) and, in 2010, the introduction of the Roy Morgan Business Survey.

Since her appointment as CEO in 1992, Michele has been responsible for the launch of Roy Morgan Single Source in other markets, including New Zealand and Indonesia and is driving the impressive global growth of the company in major markets like the United States and the United Kingdom.

Overview: A decade in review

Over the last decade, we have seen dramatic changes in Australians' priorities and worries, reflecting the changing issues facing both Australia and the world.

In 2005¹, immediately after the 2005 Bali bombings, a majority of Australians (52 per cent) saw terrorism and war as the most important issues facing the world – well ahead of economic issues (16 per cent) and the environment (12 per cent).

By early 2008², the big issue was the environment: climate change, greenhouse gas emissions, water, and so on. At its peak, in May 2008, the environment was seen by 35 per cent of Australians as the biggest problem facing the world. This was well ahead of economic concerns at 24 per cent. Remember of course, in the decade to 2007, the Australian economy was booming. This underpinned the rise of household wealth and expenditure, and as a nation, Australia turned its attention to social issues.

When the Global Financial Crisis gained force later that year³, economic concerns took over and remained a priority until the later part of last year⁴, when terrorism and war re-emerged. Now, 43 per cent consider war and terrorism the most important issue facing the world – ahead of the economy at 19 per cent and environmental issues at 14 per cent.

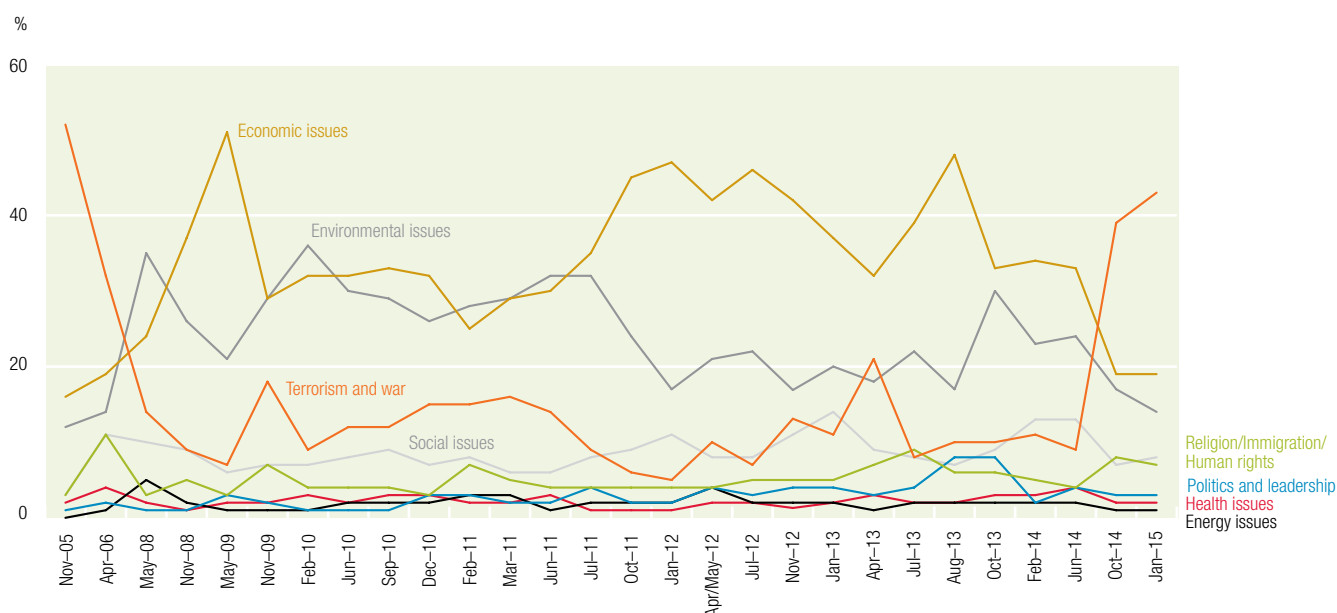
On the local or national scene, economic issues still dominate Australians' concerns, as they have done for most of the period since 2009.

It is worth noting that over the last decade, our national concerns have followed a similar pattern to global concerns. In 2005⁶, concerns about terrorism and war were seen as the biggest issue facing Australia at 21 per cent (ahead of the environment at 15 per cent and economic issues at 14 per cent). The environment as an issue peaked in May 2008⁷ when 30 per cent of Australians considered the environment the most important issue facing Australia. The environment has since declined as an issue as economic concerns take priority for Australia and Australians.

Since late last year⁸, terrorism and war have re-emerged as national concerns for Australia. Eleven per cent of Australians now consider terrorism and war to be the most important problem facing Australians.

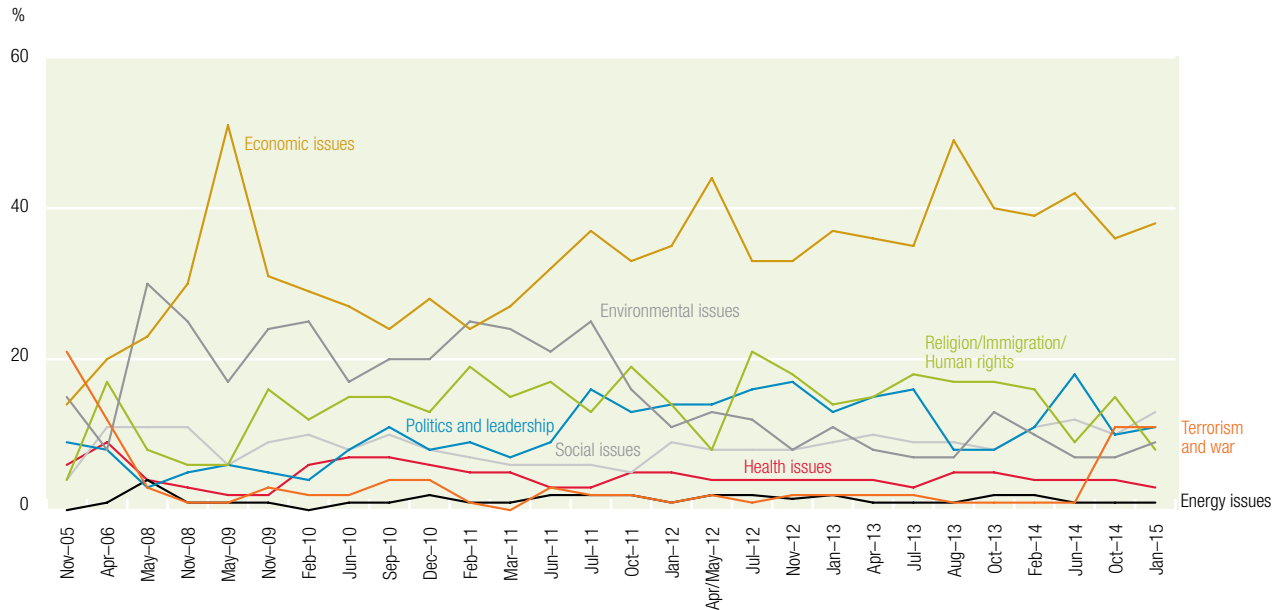
The last decade has also seen slow but dramatic changes in Australia's demography and psyche.⁹ Australia's population is growing and with 7.8 million Australians aged 50 and over, and 3.3 million aged 65 and over, the population is also ageing. Within the ageing population, the 65 and over age group is projected to grow at a faster rate as the Baby Boomers move into the age group. Only two years of Baby Boomers are in the 65 and over age group so far.

Figure 1
Most important issues facing the world



Base: Australian population 14+
Source: Roy Morgan Nationwide qualitative research conducted by telephone (n=604) 12–13 January 2015

Figure 2
Most important issues facing Australia



Base: Australian population 14+

Source: Roy Morgan Nationwide qualitative research conducted by telephone (n=604) 12–13 January 2015

As a nation, we continue to be increasingly open-minded and socially progressive. The trend is solid and manifest in such attitudes as 58 per cent support for homosexual couples adopting children. Marriage is now officially the minority: only 48 per cent of Australians aged 14 and over are now married and about two in three Australians live in a household with no children. This is the context within which the 2015 political agenda will be played out.

Australia enters 2015 in a precarious position: serious economic issues, an increasingly complex international environment; and politically, an unpopular Tony Abbott-led LNP Government, which does not appear ready, willing or able to deal with the issues and which is hampered by a dysfunctional Senate. Conservative governments, especially those that need changes, are inherently 'at odds' with the operational arm of government – the public service – with the powerful inertia of its own culture. The dysfunctional Senate makes it just that much harder.

Serious economic issues include:

- High unemployment,¹⁰ especially youth unemployment, and with falling 'hours worked', the emergence of underemployment as a major issue as part-time jobs increase at the expense of full-time jobs;
- The dramatic fall in the iron ore, coal and oil prices that has seen the end of the mining boom;

- The falling value of the Australian dollar leading to concerns about cost of living;
- An unpopular budget including changes to health and education that divided the country and has not yet been passed and now appears to have at least a \$40 billion hole; and
- A dysfunctional Senate controlled by minor parties.

Inextricably intertwined with these economic problems is the political context. The Tony Abbott LNP Government has lost the support of the Australian electorate and some of his backbenchers, and moreover, has made promises about industrial relations that have paralysed the Government in terms of much needed action to free up the labour force.

If an election were held today, the LNP Government would not be returned. However, the sheer size of the vote for other parties at the last election is an indication that the Australian electorate does not see a credible alternative in the current opposition Labor Party.

These issues are examined in detail under three major themes that will undoubtedly be underpinning the political scene this year:

- Party politics;
- Political and economic pressures; and
- The international context.



“Confronting the Abbott Government is the makeup of the Senate. The Senate is controlled by minor parties including Palmer United Party (PUP).”



Party Politics

Snapshot:

- Support for the LNP Government is 45.5 per cent versus ALP at 54.5 per cent¹¹;
- Government confidence is in negative territory at 93 points¹²;
- Australian electors prefer Malcolm Turnbull as Liberal Leader ahead of Julie Bishop who in turn is ahead of Tony Abbott for the first time¹³;
- The majority (52 per cent) of electors disapprove of Tony Abbott’s handling of his job as Prime Minister, and while Opposition Leader Bill Shorten doesn’t fare much better (40 per cent disapprove, 37 per cent approve and 23 per cent can’t say), more Australian electors believe Bill Shorten would make a better Prime Minister (43 per cent) than Tony Abbott (41 per cent)¹⁴.

The Government in review

In September 2013, after fewer than six years in Opposition, Tony Abbott led the LNP to a comfortable Federal Election victory – LNP at 53.5 per cent versus ALP at 46.5 per cent¹⁵ – and 90 seats in the House of Representatives. Although Tony Abbott has been Prime Minister for just over a year, his Government has already faced several difficult challenges, such as the departure of the Australian car industry – Holden and Toyota announcing the closure of their Australian operations within the next

three years following on from Ford’s early 2013 announcement that it was pulling out – and significant job losses at Qantas, Forge Group, Alcoa, Telstra and IBM, and several franchises ‘going under’ with associated job losses. Given these job losses, the Abbott Government’s clear priority is to find a way to improve job prospects for the 2.65 million (20.6 per cent of the Australian workforce) who are unemployed (1.40 million – 10.9 per cent) or underemployed (1.25 million – 9.7 per cent)¹⁶. However, promises made about industrial relations laws have paralysed the Abbott Government in terms of much needed action.

The drop in iron ore, coal and oil prices has seen the end of the mining boom. While the previous Government faced the issue of whether or how to redistribute the wealth from the mining boom (Mining Tax or Mining Super Profits Tax), and how to moderate environmental concerns (Carbon Tax), the LNP Abbott Government is having to deal with socioeconomic and political issues associated with the end of the mining boom.

Also confronting the Abbott Government is the makeup of the Senate. The Senate is controlled by minor parties including Palmer United Party (PUP). Billionaire Queensland miner Clive Palmer started his party midway through 2013, won his own seat of Fairfax on the Queensland Sunshine Coast, as well as the decisive balance of power in the Senate, which gave Palmer a big say on important issues such as the repeal of the Carbon Tax and the Mining Tax, and also the Abbott Government’s more controversial measures from their first Federal Budget delivered by Treasurer Joe Hockey.

While it is often hard to determine what exactly Clive Palmer's policy convictions are and while the defection of Tasmanian PUP Senator Jacqui Lambie late last year has reduced Palmer's power somewhat, PUP's position holding two crucial votes in the Senate (Senators Glenn Lazarus and Dio Wang) presents many headaches for the Prime Minister over the next two years at least.

The Federal Budget itself represents yet another huge challenge for the Abbott LNP Government. It was an unpopular Budget that divided the country with many key measures not passed by the Senate nearly a year after the Federal Budget was announced, and more recently, the \$40 billion 'hole' in that Budget.

There was a rocky start to the new LNP Government's Indonesian–Australian relationship following allegations of Australians spying on several Asian nations on behalf of the United States as well as continued controversy about asylum seekers. Skilful diplomacy by Foreign Minister Julie Bishop, as well as solid negotiations by Trade Minister Andrew Robb, saw our relationship with Indonesia improve. However, the recent executions of drug traffickers in Indonesia and the fact two Australians remain on death row are likely to present the Abbott Government with further headaches over the following year. Abbott has already made an appeal for clemency for the two convicted Australian drug traffickers Myuran Sukumaran and Andrew Chan to new Indonesian President Joko Widodo.

Several important international trade agreements are being implemented, including those with South Korea, China and Japan. Discussions have begun with India, and Indonesia might follow. The most recent Japanese Trade Agreement saw the price of imported Japanese cars fall dramatically. The implications of our increasing trade relations include cheaper imports, potentially higher export prices for food, but continued downward pressure on labour costs, particularly affecting manufacturing in Australia and therefore unemployment.

State elections

In March 2014, two State elections held in Tasmania and South Australia were split between the two sides of politics. The Liberals won a convincing victory in Tasmania to form Government for the first time since 1998, while in South Australia, the 12-year old Labor Government held on for a fourth term with the support of an independent. The South Australian result was followed by another Labor victory in

Victoria in November 2014. The Queensland Election in January 2015 and the New South Wales Election in March will be crucial in determining whether the momentum that brought the Abbott Government to power has comprehensively reversed and Australians are swinging once more to the Labor side of politics. The latest Morgan Poll results show the Coalition well ahead in New South Wales, but Queensland too close to call.¹⁷

Cabinet reshuffle

Prime Minister Tony Abbott announced a Cabinet reshuffle just before Christmas. This involved Immigration Minister Scott Morrison – widely seen as the Government's most effective performer during the Coalition's first year in office – being appointed Minister for Social Services, which includes welfare, child care and the Abbott Government's contentious paid parental leave scheme. An important part of Morrison's remit during the remainder of the Parliamentary term is to reform the pensions system and the changes to unemployment benefits that are designed to get unemployed Australians back in work.

Politics in 2015 so far

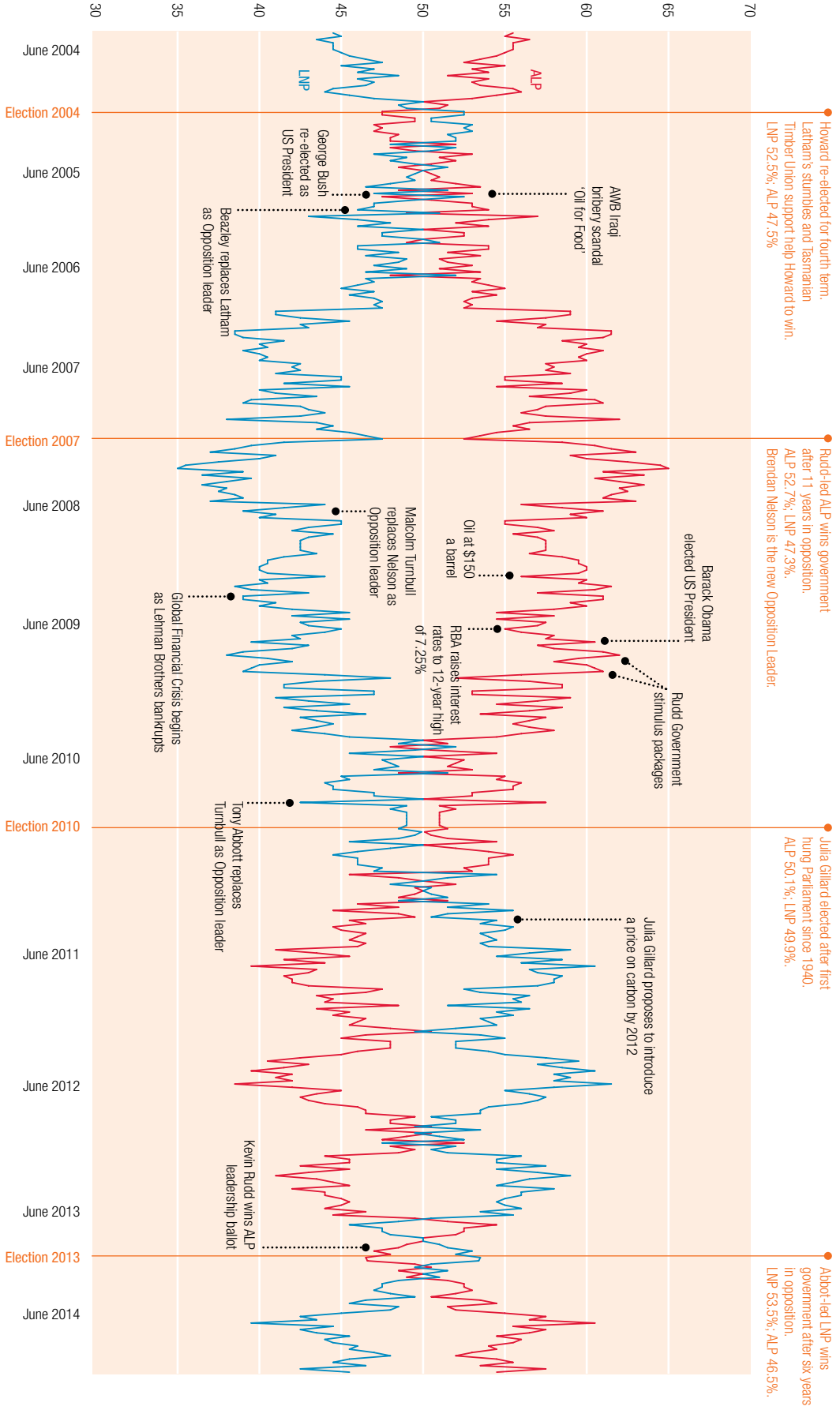
In the first Morgan Poll taken this year, and the first since the LNP Cabinet reshuffle, support for the LNP was 45.5 per cent. This is an increase of three per cent since before Christmas, but still puts the LNP well behind the ALP at 54.5 per cent on a two party preferred basis. If a Federal Election were held in January, the LNP would not be returned, the ALP would still win easily according to this Morgan Poll on voting intention conducted with an Australia-wide cross section of 2622 Australian electors aged 18 and over in the first two weekends in January.

Primary support for the LNP increased to 38.5 per cent (up 3.5 per cent), level with the ALP (down 2.5 per cent). Support for the other parties totalled 23 per cent including:

- The Greens at 9.5 per cent;
- PUP at two per cent; and
- Independents/others at 11.5 per cent.¹⁸

The Coalition's improvement reverses the large surge to the Opposition seen in December when Treasurer Joe Hockey was forced to reveal an unexpected increase to the size of Australia's Federal Budget deficit. However, it should be noted that the party in office usually gains support early in the new year.

Figure 3
Federal: two party preferred



Base: Australian voters aged 18+
 Source: Roy Morgan Nationwide Research (MIP)



“Australian electors prefer Malcolm Turnbull as Liberal Leader ahead of Julie Bishop who in turn is ahead of Tony Abbott for the first time.”



Roy Morgan Government Confidence Rating

The Roy Morgan Government Confidence Rating is 93 points, unchanged since before Christmas and the Cabinet reshuffle. More Australians say Australia is ‘heading in the wrong direction’ (44 per cent) than say Australia is ‘heading in the right direction’ (37 per cent).¹⁹

Leader approvals

Australia enters 2015 with little support for either Prime Minister Tony Abbott or Opposition Leader Bill Shorten, with more Australians believing Bill Shorten would make a better Prime Minister than Tony Abbott,²⁰ and Australian electors preferring²¹ Malcolm Turnbull or Julie Bishop as Liberal Leader ahead of Tony Abbott according to a special telephone Morgan Poll, conducted 12–13 January with an Australia-wide cross section of 523 electors.

Prime Minister Tony Abbott²² has lost popularity, with a majority of electors (52 per cent) now disapproving of his handling of his job as Prime Minister, only 37 per cent approving and 11 per cent can’t say.

For Opposition Leader Bill Shorten’s handling of

his job,²³ electors’ disapproval (40 per cent) also outweighs approval (37 per cent) and a high 23 per cent still can’t say how they view the Opposition Leader after more than a year in the job.

Despite neither leader having positive job approval,²⁴ Opposition Leader Bill Shorten (43 per cent, up six per cent since October 2014) now narrowly leads Prime Minister Tony Abbott (41 per cent, down three per cent) as the ‘better Prime Minister’ according to a special telephone Morgan Poll conducted 12–13 January.

Former Liberal Party Leader Malcolm Turnbull is preferred²⁵ as Liberal Leader by 36 per cent of electors – well ahead of Tony Abbott at 14 per cent (down five per cent). This is not new: Malcolm Turnbull has been preferred over Tony Abbott for some time and indeed his support at 36 per cent is some two per cent lower than recorded in 30 September — 2 October 2014. Deputy Leader Julie Bishop has improved her standing substantially in the last few months. At 26 per cent (up 10 per cent), Bishop is now ahead of Abbott for the first time as preferred Liberal Leader. Bishop’s support has surged over the past year following her strong performance as Foreign Minister dealing with the crash of MH17 in Eastern Ukraine and also the increasing

tension surrounding the Islamic State (ISIS) in the Middle East.

Although only 14 per cent of electors²⁶ (down five per cent) prefer Tony Abbott as Liberal Leader, LNP supporters still narrowly favour Abbott (30 per cent, down 11 per cent) over both Bishop (28 per cent, up 11 per cent) and Turnbull (26 per cent, up two per cent). It appears that Bishop has gained support from LNP voters who previously supported Abbott whereas Turnbull is virtually unchanged from three months ago. Treasurer Joe Hockey has lost significant support and is now at only four per cent (down four per cent).

Electors are more confused about who they want leading the ALP,²⁷ with no candidate attracting more than a quarter of the electorate's support – although current Labor Leader Bill Shorten (preferred by 25 per cent, up four per cent) has slightly consolidated his lead over Deputy Labor Leader Tanya Plibersek (18 per cent, unchanged) and is now significantly in front of both Shadow Infrastructure Minister Anthony Albanese (10 per cent, down five per cent) and former Deputy Prime Minister Wayne Swan (10 per cent, unchanged).

Although leadership and popularity issues are interesting, it is crucial to remember what matters to the electorate. When asked about the most important problems facing Australia, party politics and popularity contests are low down on the agenda – it's all about the economy.²⁸ Some 38 per cent mention something to do with the economy, economic problems, interest rates, unemployment, the Federal

Budget, cost of living, and so on, as the most important problems facing Australia. Economic issues are, and continue to be, well ahead of social issues, human rights, and even politics and leadership.

The real way to solve the 'leadership vacuum' is not to seek popularity, what is needed is bravery: clear, honest articulation of the problems facing Australia and Australians, and solutions that are explained clearly and with the honesty of the leader's convictions.

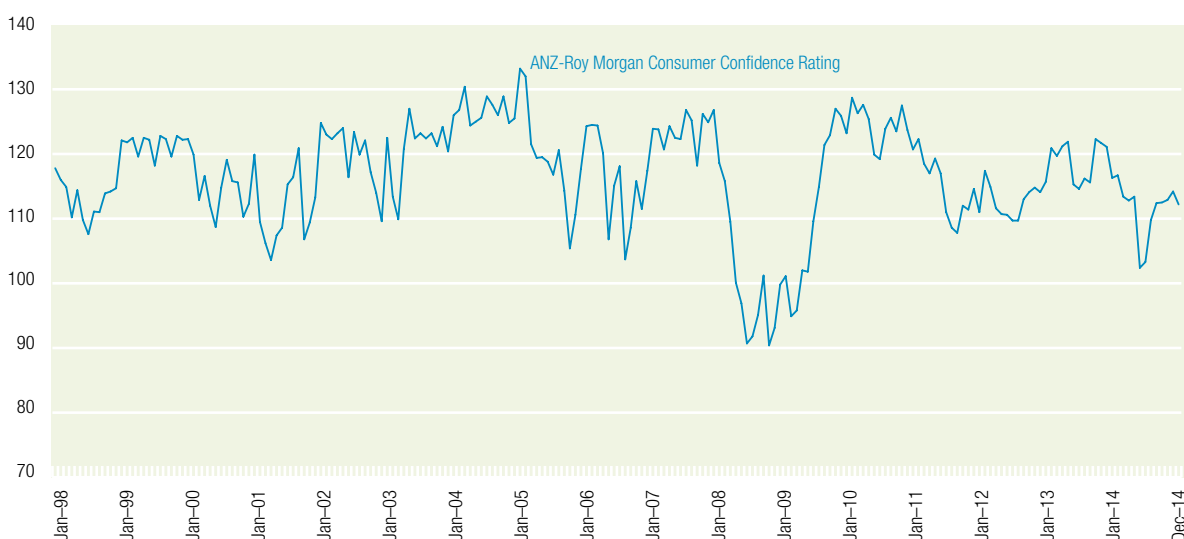
The Abbott Government appears to be making the same mistake as the Baillieu/Napthine Victorian Coalition Government – following the advice of political advisers or 'spin doctors' who are more worried about how any action will be seen rather than tackling the real issues. That's not leadership.

Political and economic pressures

Snapshot:

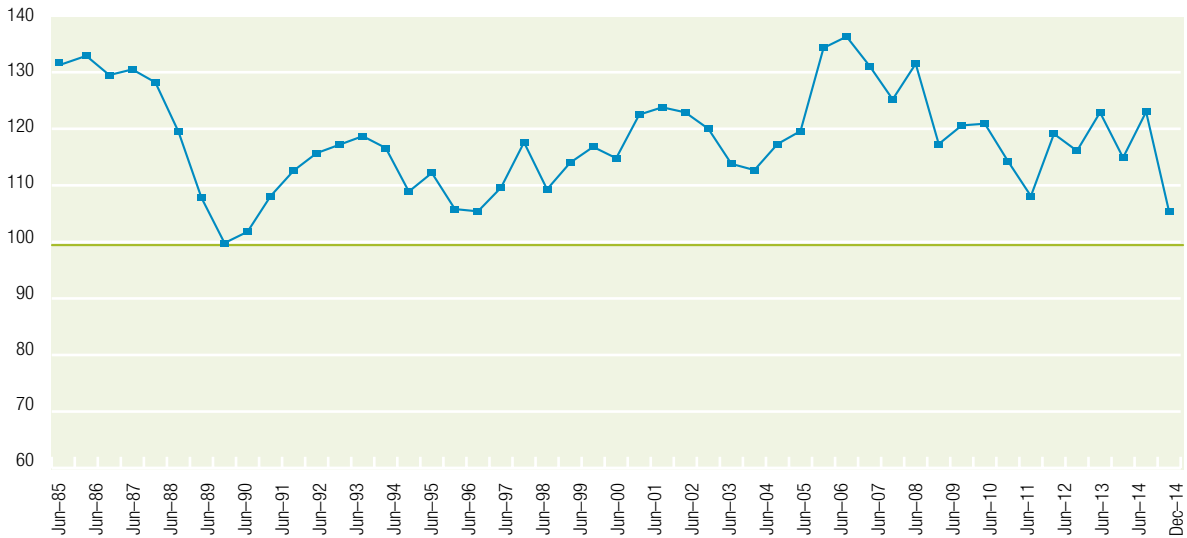
- Consumer confidence is 113.6²⁹ (*changes weekly*);
- Business confidence is 105.3 (*changes monthly*);
- Both are above 100 but Australia is nowhere near as confident as many of our Asian neighbours – ANZ Roy Morgan Consumer Confidence Rating shows Australia behind China at 155.5, Indonesia 152.0, Vietnam 135.6, Hong Kong 130.1, New Zealand 126.5, Singapore 121.8, India 120.3, and Thailand 117.4, but well ahead of Taiwan at 96.3 and South Korea at 80.6.³⁰ (*changes monthly*)

Figure 4
ANZ-Roy Morgan consumer confidence (monthly trend)



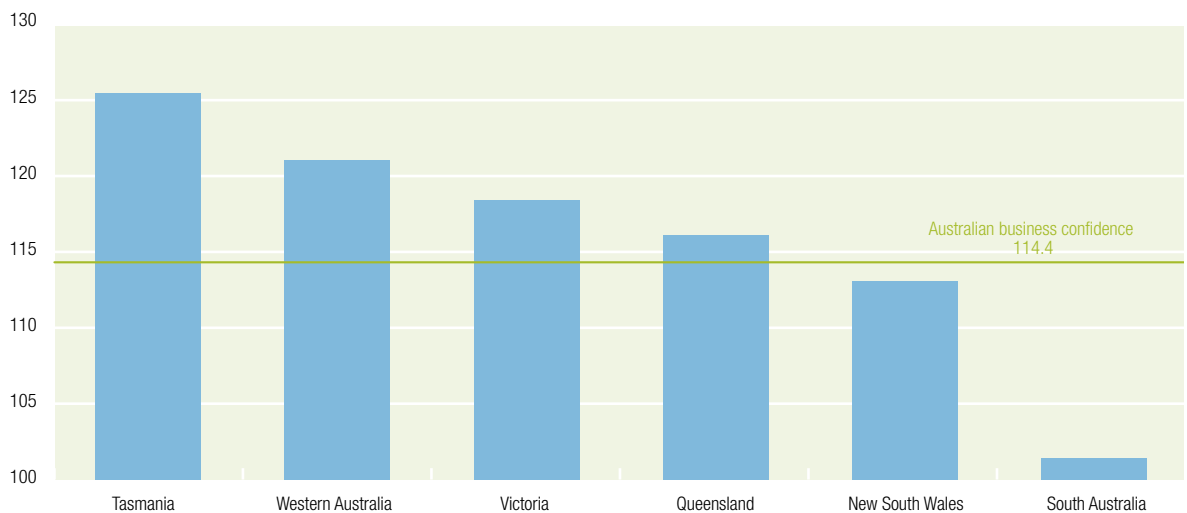
Base: Australian population aged 14+
Source: Roy Morgan Research; Monthly data, January 1998 – December 2014

Figure 5
Roy Morgan business confidence (monthly trend)



Base: Australian population aged 14+
Source: Roy Morgan Research; Monthly data, January 1998 – December 2014

Figure 6
Roy Morgan business confidence



Base: Australian population aged 14+
Source: Roy Morgan Research; Monthly data, January 1998 – December 2014

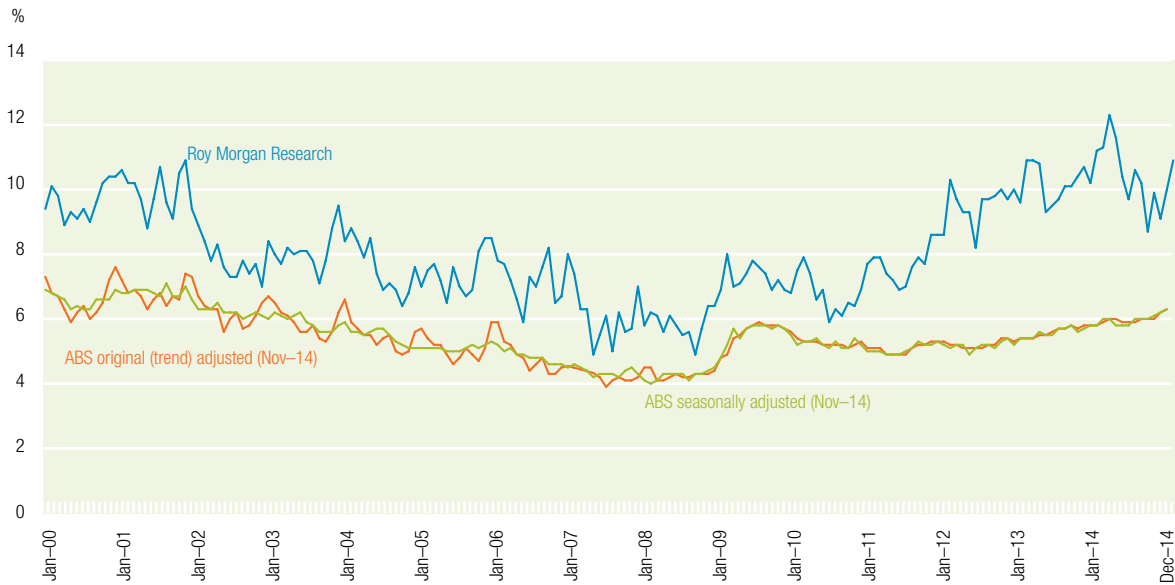
Unemployment is Australia's major issue, particularly among young people and those made redundant due to Australia's deteriorating manufacturing and mining industries. Unemployment increased and total hours worked decreased substantially over the last year.

The latest Roy Morgan December employment estimates³¹ show a rise in part-time workers with the full-time workforce stagnant. Australia's

unemployment is now at 10.9 per cent (1.40 million) with a further 9.7 per cent (1.25 million) under-employed. That is almost 2.65 million Australians looking for work or looking for more work.

Real unemployment as measured by Roy Morgan is way ahead of the Australian Bureau of Statistics (ABS) estimate³² of 6.2 per cent (or 6.1 per cent seasonally adjusted) based on a much stricter definition of unemployment. It has been of concern that using

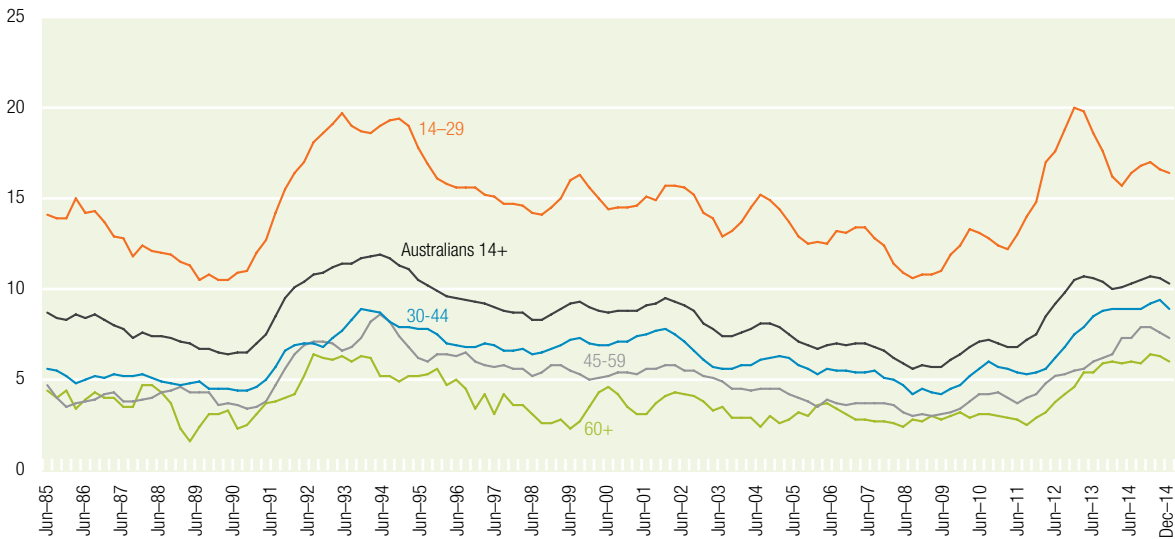
Figure 7
Level of workforce unemployed



Base: Australian population aged 14+ in workforce
Source: Roy Morgan Research; monthly data, January 2000 – December 2014, ABS; monthly data, January 2000 – December 2014

Figure 8
Unemployment by age group

% Workforce unemployed in each age group



Base: Australian population aged 14+ in workforce
Source: Roy Morgan Research; 12 month moving averages, March 1985 – December 2014

an estimate of unemployment with such a low base gives governments and policymakers a false sense of security.

However, even the lower ABS unemployment estimates are showing the seriousness of the growing unemployment and underemployment in this country. The ABS unemployment figure³³ of 6.1 per cent is

substantially higher than its own estimate of 5.2 per cent in December 2011, 5.4 per cent in December 2012 and 5.8 per cent in December 2013.

Crucially the ABS estimate of ‘total hours worked’ in the month of December dropped substantially in the last 12 months – from 1634 million in December 2013 to 1597.8 million in December 2014:



“Prime Minister Tony Abbott’s team has so far struggled to make real progress on any major economic reforms, so little has been done to implement pro-growth policies.”



“The overall picture of the Australian labour market shows an economy with a large amount of under-utilised labour – now 2.648 million Australians (20.6 per cent) are either unemployed or under-employed. It is now more than three years that more than two million Australians have been looking for work or looking for more work (37 months) and the 31st straight month more than one million Australians have been unemployed – both these figures demonstrate that the Abbott Government must look seriously at industrial relations reform – including the abolition of weekend and public holiday penalty rates as recently called for by the Restaurant and Catering Association.”
– Gary Morgan, January 2014³⁴

Despite his promises regarding industrial relations, Tony Abbott will come under increasing pressure to free up the labour market to solve unemployment. Prime Minister Tony Abbott’s team has so far struggled to make real progress on any major economic reforms, so little has been done to implement pro-growth policies. Employers will only employ more people if the Abbott Government cuts ‘red tape’, and reverses many of the ‘pro-union’ industrial relations laws. Today the over-regulated employment market means the large Australian cash economy is the only area of Australian ‘business’ that is ‘booming’.

Now that the true state of Australia’s employment market is able to be considered by policymakers (including the Reserve Bank), ‘real action’ to deal with Australia’s deteriorating economy can be taken.

The Reserve Bank of Australia (RBA) now has good reason and evidence to reduce interest rates by one per cent. As at mid-January, it is more than 18 months (August 2013) since the RBA cut interest rates and leaves Australian interest rates (2.50 per cent) among the highest in the developed world. (*RBA meeting in early February could well see an interest rate cut.*)

International context

The international context is one that includes unrest and terrorism throughout much of the world, particularly in the Middle East and Eastern Europe, which directly affects Australia and Australia’s increasing engagement with, and dependence on, Asia.

Asian engagement

Australia is increasingly engaging with, and part of, Asia. Today only 71.2 per cent of Australians³⁵ were born in Australia and some 10 per cent were born in Asia or the Middle East. That number would increase substantially if it were to include children who were born here with Asian parents. Australians increasingly travel to Asian destinations on holidays, for business, or to visit family and friends.

Trade with Asia is increasing. Several important international trade agreements are being implemented, including those with three of Australia's biggest trading partners: China, Japan and South Korea. It is reasonable to anticipate more trade agreements and thus more exchange of products, services and simply more engagement. The implications of our increasing trade relations include cheaper imports, potentially higher export prices for food, but continued downward pressure on labour costs, particularly affecting manufacturing in Australia and therefore unemployment.

Politically in an environment where unemployment is, and is increasingly seen as, one of, if not the single most important issue, there are bound to be tensions as these trade agreements and the business done as a result change the nature of our economy – and there are winners and losers.

International unrest

At the same time, Australians are experiencing and reporting increased concern about international unrest, religious extremists, terrorism and war. In particular, now 43 per cent consider war and terrorism the most important issue facing the world³⁶ – ahead of the economy at 19 per cent and environmental issues at 14 per cent. And since late last year, terrorism and war have re-emerged as national concerns for Australia. Eleven per cent of Australians now consider terrorism and war the most important problem facing Australians, and Muslims are increasingly seen

“Australians are experiencing and reporting increased concern about international unrest, religious extremists, terrorism and war.”



to blame for the terrorism in the world. A majority (52 per cent) now believe Muslims are one of the groups responsible for terrorism (up from 47 per cent in 2007).

A special Morgan Poll conducted after the terrorist attacks in France in January asked Australians to name which one group they consider most responsible for terrorism in the world today. Forty-two per cent (up 17 per cent) mentioned Muslims well ahead of any other group. A further seven per cent (down one per cent) mentioned Arabs while only eight per cent (down 10 per cent) mentioned Americans and just four per cent (unchanged) mentioned Israelis. Clearly over the past eight years, Australians have become far more likely to put the blame for terrorism at the feet of Muslims rather than any other group.

The complex set of issues surrounding asylum seekers and their treatment has divided the nation – and not on political lines. Indeed, the human rights aspect of Australia's treatment of asylum seekers has drawn outrage and despair from across the political spectrum. It is in part why the non-major parties have gained momentum. The fear surrounding asylum seekers, whether expressed as a fear that they may be criminals, that there may simply be too many of them, that they are too different from us to assimilate, and many other fears – rational and irrational – also cut across political lines. With increased global unrest, increasing terrorist attacks and heightened fears among the Australian population, the issue of asylum seekers is unlikely to disappear. It will remain a ‘sleeping’ ready to ignite at any moment.

How these issues may play out

Unless decisive action is taken by the Abbott Government on unemployment and getting a Federal Budget passed, 2015 can expect to see leadership battles, industrial unrest as unions and business are left to ‘battle it out’ in a political power vacuum, and an increasingly divided nation.

If decisive action is taken by the Government, without explaining clearly to the electorate why decisive action is needed and how the actions will take the country forwards, the Government will be unable to govern.

The only hope is if the Government is able to understand the fears and hopes of the electorate, and more particularly, the different electorates, cohorts, communities and people, to be able to explain and regain the critical level of trust needed to have Australians support the changes needed to take the country in the right direction.

“With increased global unrest, increasing terrorist attacks and heightened fears among the Australian population, the issue of asylum seekers is unlikely to disappear. It will remain a ‘sleeper’ ready to ignite at any moment.”



The sleepers

At any point in time there are always ‘sleepers’ – those issues that are not ‘top of mind’ for the electorate, but about which they feel strongly once they are reminded.

The obvious issues this year are:

- The Royal Commission into Institutional Responses to Child Sexual Abuse: Although the enquiry is not set to hand down its findings this year, publicity about a single child is enough to inflame this emotive issue;
- The environment: An environmental disaster in Australia or anywhere could inflame Australians’ latent emotions about the environment;
- Asylum seekers: Any asylum seeker boat approaching Australian shores is guaranteed to draw extensive media coverage and alongside that

will be considerable discussion about the effectiveness of the Government’s approach to asylum seekers and whether their policy is working;

- Health is always a priority for Australians: The politics and economics of health have been played out recently, and we’ve seen the Government fail to gain acceptance for its proposals. A serious health scare of the order of a pandemic or any spectacular failure involving even a single human would throw this issue into the spotlight.

Clearly the media has a pivotal role in determining how any of the ‘sleepers’ are brought to the attention of the electorate. So the relationship between the Tony Abbott LNP Government and the media is itself a sleeper.

The views in this article are those of the authors and should not be attributed otherwise.

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