

BELIEVABILITY INDEX LEADERSHIP EDITION 2022



Ogilvy

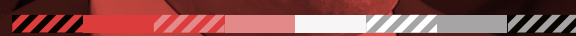




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Welcome to Ogilvy PR's Believability Index – Leadership Edition 2022

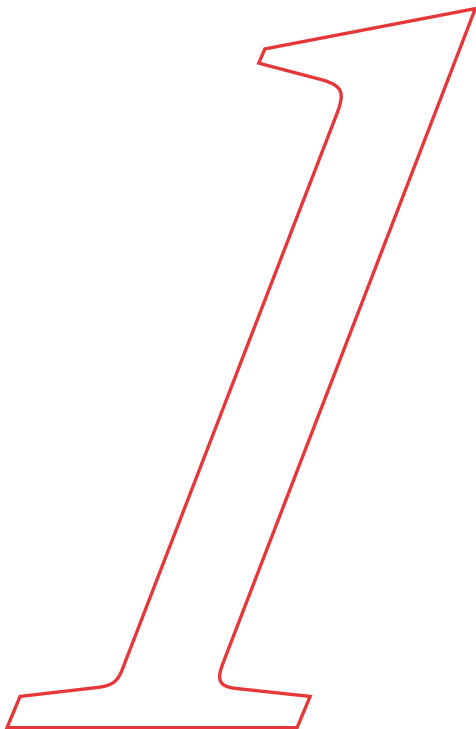


It's three years now since we launched the first edition of this report in the lead up to the last federal election. That was a time when fake news, clickbait, corporate scandals and rising inequality were undermining public faith in business, government and leadership.

From devastating bushfires and biblical floods to lockdowns and border closures, our nation has been through a lot since then. Global events like the storming of the US Capitol and Russia's invasion of Ukraine have amplified the sense that truth is in crisis, with the fight against misinformation a defining feature of the Ukrainian conflict.

Crisis management feels like the normal mode of operation in Australia and around the world, but we are still living in this 'post-truth' period of deep mistrust, high scepticism and low institutional confidence. In times like this, we need leaders who we can believe. Leaders who we can believe *in*.

In the pages that follow, we take a closer look at the head-to-head battle between the Prime Minister and Opposition Leader, the issues that voters care most about as they head to the ballot box, how those same voters view other players in the election, what the COVID-19 pandemic has done to the public perception of our state leaders, and why Australians still love New Zealand's Prime Minister.





BELIEVABILITY INDEX

Measuring the intuitive and considered perceptions of Australian voters to understand what it takes to be a leader who is not just trusted but believed, and believed in.

DISTRUSTED

SKEPTICAL


TRUSTED

BELIEVED

BELIEVED IN



Research methodology and model



**The Index has an R-squared score of .88, meaning 88% of the variation in leadership support is explained by the Believability Index.*

This report compares the believability of politicians based on the responses of 1,000 eligible Australian voters polled by Lightspeed in February 2022. This includes the leaders of the Coalition, Labor, Greens, One Nation and the United Australia Party ahead of the upcoming federal election. We also included the state premiers of New South Wales, Queensland, Victoria and Western Australia, as well as the leaders of Britain, New Zealand and the US, to provide broader context.

We wanted to understand the strongest influences on perceptions of political leaders, measuring the relative weight that voters give each of these different attributes. The research shows that it's no longer enough for leaders to focus on trust, they need to do more if they want to be someone worth believing in.

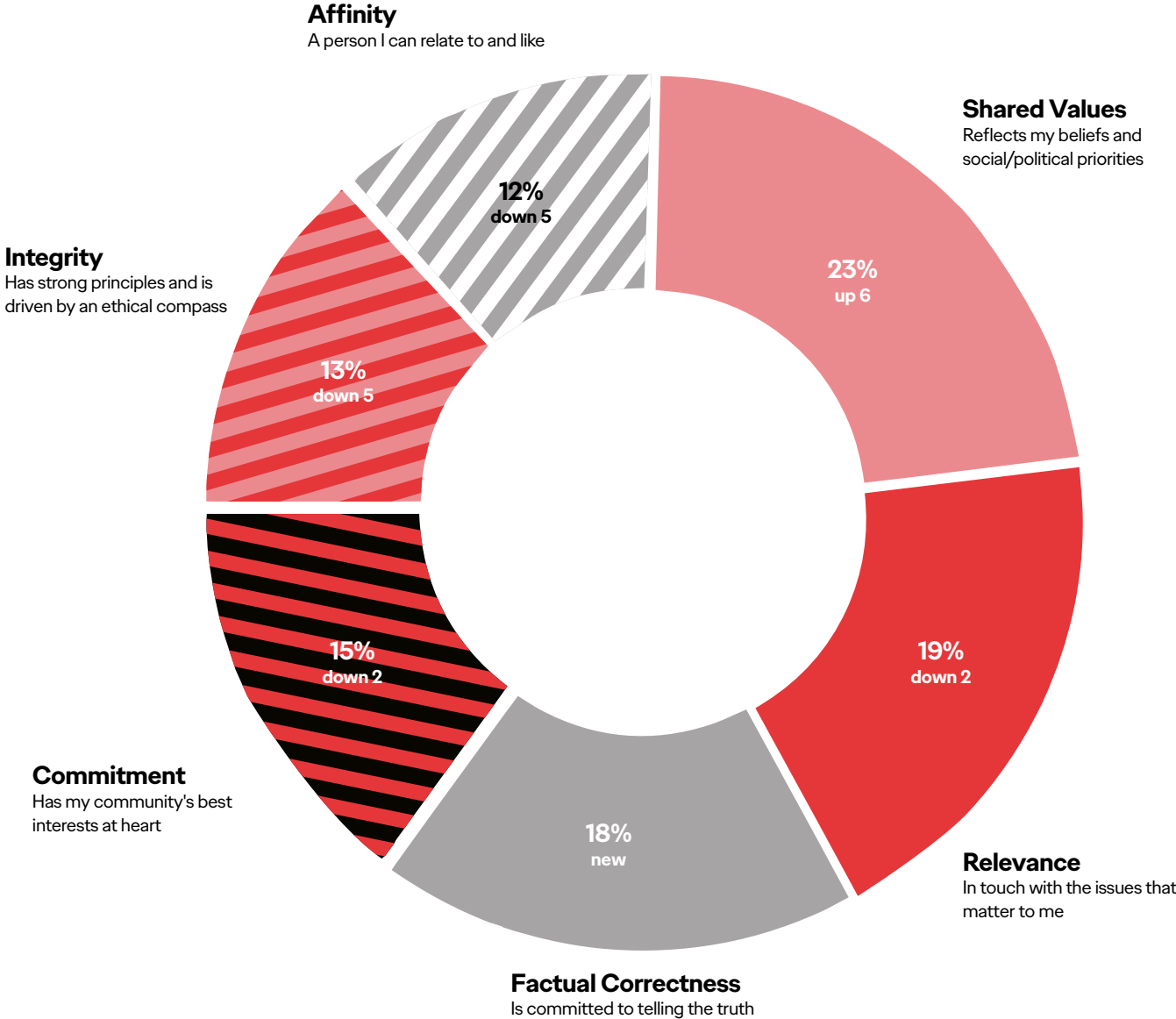
Marketing scientists combined and analysed intuitive and considered responses to explain perceptions of believability. The two systems of research combined to explain perceptions of believability and its importance to leadership strength, and to understand the influences behind it. From the range of dimensions tested, six were able to explain leadership strength to a very high degree of accuracy.

We highlighted affinity, commitment, follow through, integrity, relevance and shared values as the six attributes that defined a leader back in 2019. We've added factual correctness this time around in response to a heightened focus around truth in global politics, while removing follow through as its contribution was insignificant. Voters show a strong preference for shared values as we head to the ballot box in 2022.

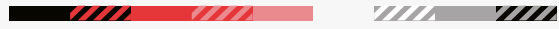


We're in a 'post-truth' period of deep distrust, high scepticism and low institutional confidence – where organisations, brands and leaders collectively face their greatest communication challenges to date. Institutional and leadership integrity is one of the defining issues of our time.

Six attributes of believability



Believability Index results



Opposition Leader Anthony Albanese is Australia's most believable federal leader, with a score of 48 showing a two-point increase on his rating in 2019. Greens Leader Adam Bandt runs a close second, with his score of 47 up two points on his predecessor, former Senator Richard Di Natale.

Prime Minister Scott Morrison has seen his score fall two points to 41, putting him just ahead of One Nation's Pauline Hanson, with United Australia Party's Clive Palmer a distant last. WA Premier Mark McGowan is the most believable state leader, edging out Victorian Premier, Dan Andrews and Queensland Premier, Annastacia Palaszczuk.

How believable are our leaders?

66

Jacinda Ardern
NZ Prime Minister
down 11

47

Adam Bandt
Greens Leader
new, up 2 on prev. Greens Leader

44

Dominic Perrottet
NSW Premier

39

Pauline Hanson
One Nation Leader
down 5

48

Anthony Albanese
Opposition Leader
up 2

47

Dan Andrews
VIC Premier

44

Josh Frydenberg
Federal Treasurer

35

Barnaby Joyce
Nationals Leader

48

Mark McGowan
WA Premier

47

Annastacia Palaszczuk
QLD Premier

41

Scott Morrison
Prime Minister
down 2

29

Clive Palmer
United Australia Party Leader
down 1

47

Gladys Berejiklian
Former NSW Premier

46

Joe Biden
US President

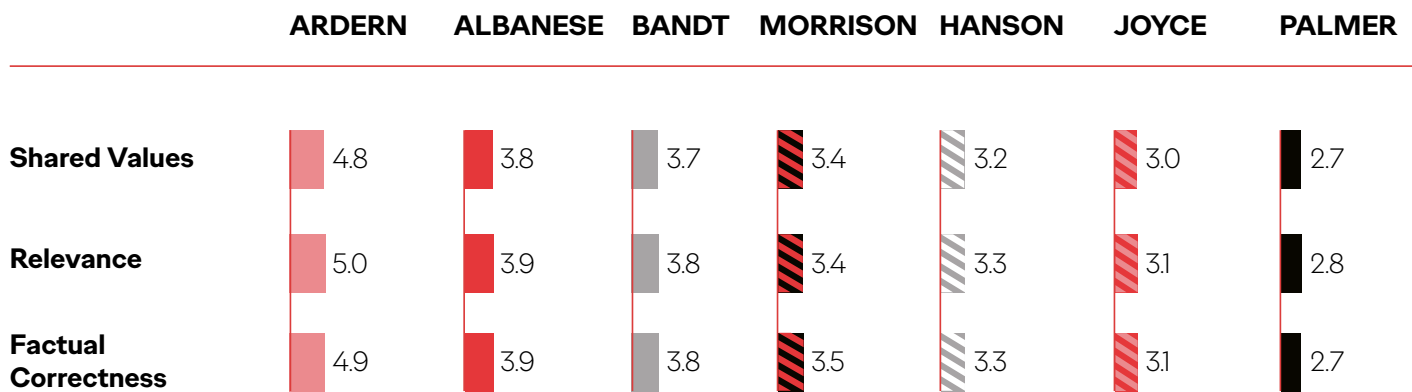
40

Boris Johnson
UK Prime Minister

28

Donald Trump
Former US President

How leaders rate on key attributes of believability



This represents the average score for each attribute on a scale of 1 to 7. Jacinda Ardern's consistently high scores show that many Australian voters share her values, seeing her as relevant and factually correct. Clive Palmer's low scores suggest that most voters find him much less believable.





ANALYSIS AND INSIGHTS

Morrison versus Albanese



Love him or hate him, four years into the job, Australian voters feel that they have a good sense of the Prime Minister, with 58 per cent saying they know a lot about Scott Morrison. The same can't be said about the Opposition Leader, with 54 per cent saying they know a little about Anthony Albanese and 15 per cent admitting they've never heard of him. While this small target strategy is a deliberate tactic from the Opposition, the voters will decide come May how much visibility matters.

Albanese's identity issues are more pronounced among young voters, with 47 per cent of those aged 18-24 and 24 per cent of those aged 25-34 not knowing who he is.

The leaders of the two main parties are neck and neck from a popularity perspective, with both attracting strong positive sentiment from 20 per cent of voters. Worryingly for the PM, his strong negative sentiment is much higher (34 per cent) than the Opposition Leader's (19 per cent).

Morrison's positive sentiment is highest among those aged 55-64 (27 per cent) and male voters (25 per cent). Regional voters (37 per cent), Victorians, Queenslanders, West Australians, and the same 55-64 age group (all 36 per cent) express the strongest dislike for him. While the regional weakness may be offset by Barnaby Joyce's return to the National's leadership, the results are a concern given the importance of Queensland and Western Australia to the Coalition's electoral prospects.

Positive sentiment for Albanese is strongest among male voters, those aged 55-64, and West Australians (all 23 per cent). Labor hasn't traditionally done well in WA, but is quietly confident of picking up seats in the state this time around. Negative sentiment in Queensland (23 per cent) suggests Labor will struggle to capitalise on the PM's poor polling in the state.

The Prime Minister is much more unpopular among female voters, with 34 per cent expressing strongly negative sentiment compared with just 16 per cent for Albanese. Morrison has been widely criticised for perceived policy failures including his response to the Independent Review into Commonwealth Parliamentary Workplaces, domestic violence, economic inequality including pay disparity, and the high cost of early childhood education. He's also significantly more unpopular in the regions (26 per cent) than the Opposition Leader (19 per cent).

Believability takes a swing to the left

	SCOTT MORRISON			ANTHONY ALBANESE		
	2019	2022	change	2019	2022	change
Affinity	3.7	3.6	-0.13	3.9	4.1	0.16
Integrity	3.7	3.5	-0.23	3.8	3.9	0.15
Commitment	3.7	3.5	-0.18	3.8	4.0	0.16
Shared Values	3.5	3.4	-0.09	3.7	3.8	0.10
Relevance	3.5	3.4	-0.11	3.7	3.9	0.18

Factual Correctness is not included in this table because it was not listed as an attribute in the 2019 model.

When we dig a little deeper into the attributes that make a leader believable, more than one in three voters say the Prime Minister is completely out of touch and his values are very different to theirs. They think he lacks authenticity, commitment, integrity and purpose. This is concerning feedback entering an election campaign, a campaign that will be fought largely on cost of living, especially when negative sentiment towards Albanese is 10-15 percentage points lower across these attributes.

But the PM has some advantages from a personal brand perspective, with more voters saying he is intelligent (27 per cent versus 22 per cent for Albanese), committed to his values (24 per cent v 19 per cent), and relevant to their life (23 per cent v 16 per cent).

Few voters think Albanese is inspirational (10 per cent) or stands for something bigger (13 per cent). Will presenting a small target prove to be a better strategy than last time around, when Labor promoted bold policies and lost 'the unlosable election'? Or will the lack of something tangible to get behind confine them to the same fate?



'None of the above' is preferred PM

Despite the strong negative sentiment he attracts, Morrison is still preferred PM for 20 per cent of voters, compared with the 16 per cent who would like to see Albanese elected. But despite being offered a list of more than 10 politicians including all prominent party leaders, 34 per cent of voters selected 'none of the above' as their preferred PM. This number rises to 45 per cent among those aged 18-24 and 42 per cent for female voters.

Need To Know

- Voters feel familiar with the PM but his believability rating has dropped.
- Almost half of young voters have never heard of Anthony Albanese.
- 'None of the above' was easily the most popular choice for preferred PM.

Who voters would most like to see as PM

20%	Scott Morrison
16%	Anthony Albanese
8%	Pauline Hanson
7%	Tanya Plibersek
3%	Adam Bandt
2%	Barnaby Joyce
2%	Clive Palmer
34%	None of the above

Counting the cost of living



Rising inflation and low wage growth means the cost of living is the biggest concern for voters heading into the federal election, with 89 per cent indicating this was an issue they care strongly about. Voters also flagged housing affordability (77 per cent) and rebuilding the economy (75 per cent) as important issues, suggesting that economic management will once again be the key policy debate for major parties to win.

Cost of living scores even higher among those aged 55-64 (95 per cent) and 45-54 (92 per cent), as well as with regional voters (90 per cent). Housing affordability is most likely to be a vote winner with younger age groups (18-34 years) and female voters (both 82 per cent). Rebuilding the economy is a bigger issue for voters aged 55-64 (83 per cent) and 45-54 (78 per cent).

Need to Know

- Voters are most concerned with the cost of living and economic management.
- Affordable housing is a bigger issue for younger and female voters.
- Climate change is a lower priority, but older voters worry about energy reliability.

Management of the pandemic (78 per cent) and energy reliability (75 per cent) are also important issues for most voters. Pandemic management scores highest with voters aged 55-64 (84 per cent), NSW voters (81 per cent), and female voters (80 per cent). Energy reliability matters most to Australians aged 55-64 (85 per cent) and 45-54 (80 per cent).

Although energy reliability is in, climate change is a priority for fewer Australians. While 63 per cent list it as one of their most important issues, 9 per cent don't care about it at all. Some 63 per cent rate it as one of their most important issues and 9 per cent say they don't care about it at all. Both parties are keen to neutralise the climate issue, but some independents will likely do well basing campaigns around it, even if it isn't a national priority.

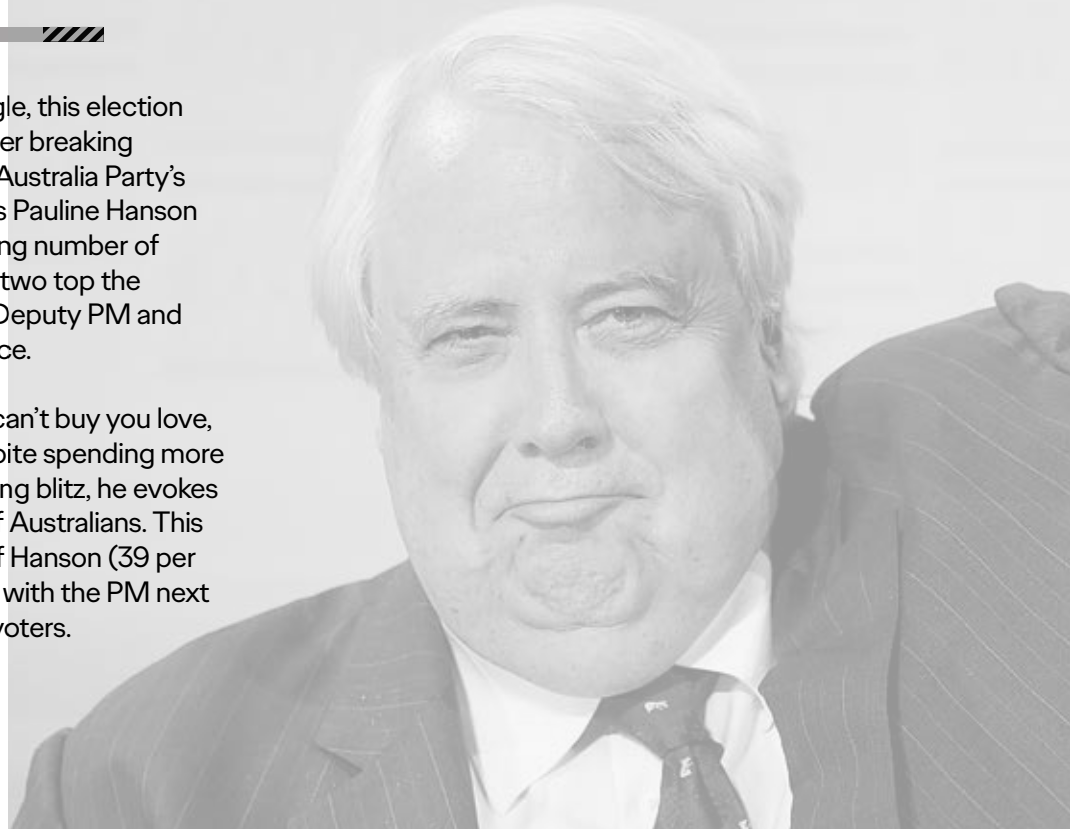
National security is highlighted as a priority by 69 per cent, with those aged 55-64 (79 per cent) significantly more concerned. The government is hoping to frame this as a khaki election, using geopolitical uncertainty surrounding Russia's invasion of Ukraine to stoke fears that Labor can't be trusted to manage national security. Taxation, which the Coalition has traditionally used very effectively as a weapon against Labor, is a lower priority (65 per cent).



How voters view the fringe

Beyond the main power struggle, this election campaign has seen Clive Palmer breaking spending records. The United Australia Party's Leader has joined One Nation's Pauline Hanson in looking to tap into the growing number of disenfranchised voters. Those two top the unpopularity ratings ahead of Deputy PM and Nationals Leader, Barnaby Joyce.

The Beatles sang that money can't buy you love, and Palmer is living proof. Despite spending more than \$31 million on his advertising blitz, he evokes a strong dislike in 51 per cent of Australians. This puts him comfortably ahead of Hanson (39 per cent) and Joyce (37 per cent), with the PM next on the list with 34 per cent of voters.



Palmer is perceived by many as factually incorrect (52 per cent), inauthentic (45 per cent), and lacking in purpose (38 per cent). Voters say he has weak integrity (51 per cent), lacks commitment (48 per cent), and doesn't follow through on what he says (46 per cent). He manages to score worse on every attribute than any other Australian politician in the survey. It's an achievement of sorts.

So, how does being wildly unpopular impact believability? Hanson significantly outperforms every other federal politician on our list in terms of having something different to say (29 per cent). Her views are more likely to be popular with older men and regional voters. Palmer doesn't attract significant support with any demographic.

A surprisingly high 8 per cent of voters in our survey say they share Hanson's views, which puts her on par with Morrison and a point ahead of Albanese in the attribute respondents identified as most important. This suggests she has a strong core of support.

But a much higher 45 per cent say Hanson's views are very different to theirs, topped only by Palmer (54 per cent). In short, most Australians don't believe in their divisive policies. Joyce's views are also poorly aligned with many voters, invoking strong negative feelings with 43 per cent of voters. The PM is next at 37 per cent.

Greens' Leader Bandt has a different problem – 49 per cent of voters in the survey sample have no idea who he is. This is remarkable when you consider that the Greens are expected to win more votes than any party other than Labor and the Liberals. Among those who have heard of him, Bandt is equal with Morrison and one point behind Albanese on shared values.

From a personal brand perspective, Bandt scores lowest as an inspirational leader (5 per cent) and doing what he says he will (6 per cent). If Albanese is presenting a small target, Bandt's is almost invisible.

Need to Know

- Clive Palmer is the most unpopular candidate despite record campaign spending.
- Pauline Hanson has strong core support but alienates many voters.
- Half of our voters have never even heard of Greens Leader Adam Bandt.



States in the spotlight

State premiers across Australia have found themselves in the spotlight like never before during the pandemic. Victoria's Daniel Andrews oversaw the world's longest lockdown, Queensland's Annastacia Palaszczuk and WA's Mark McGowan kept borders closed long after others reopened, and NSW's Dominic Perrottet took the top job from Gladys Berejiklian at a time when COVID-19 infection numbers were spiralling out of control.

Voters feel very familiar with Berejiklian after her personal life was dissected by ICAC and reported in the media. She and Andrews (both 36 per cent) are ahead of Albanese (31 per cent) when voters consider whether they know a lot about our list of politicians. The PM is way out ahead at 58 per cent.

More people say they have never heard of Albanese (15 per cent) than Palaszczuk (14 per cent), Andrews (13 per cent) or Berejiklian (11 per cent). Perrottet is the least visible of the state premiers (29 per cent) following his relatively recent appointment.

Andrews and McGowan alienate the most voters after taking hardline stances on COVID-19 management and restrictions, with both attracting strong negative sentiment among 24 per cent of voters. Palaszczuk and Perrottet are not far behind at 22 per cent.

Andrews has the strongest personal brand of the state premiers in our survey. Voters are more likely to say he is intelligent, committed to the community, and committed to his values when compared with his peers. This bodes well for him with the Victorian state election taking place in November.

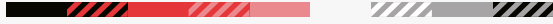
NSW Premier Dominic Perrottet is viewed as less trustworthy and inspirational than the other state leaders in our survey. Voters are less likely to say that he stands for something bigger, or that they agree with his values, yet he has 12 months until the next election to turn that around.



Need to Know

- Voters feel more familiar with Gladys Berejiklian and Dan Andrews than Anthony Albanese.
- State premiers alienated many voters with lockdowns and border closures.
- Mark McGowan is seen as a strong leader after refusing to be swayed by popular opinion.

Australia still loves Jacinda



Jacinda Ardern was Australia's favourite politician when we published our first Believability Index report before the last federal election back in 2019. And our voters continue to rate New Zealand's Prime Minister much higher than any Australian politician in our survey.

She attracts strong positive sentiment from 44 per cent of voters in our survey, way ahead of Australia's federal election candidates where Morrison and Albanese lead the field with 20 per cent. Only 10 per cent express strong negative feelings towards her, compared with 34 per cent for Morrison and 19 per cent for Albanese.

Australian voters are much more likely to share her values, feel that she's relevant to their life and is factually correct. They rate her much higher than Scott Morrison or Anthony Albanese on affinity, commitment and integrity.

Need to Know

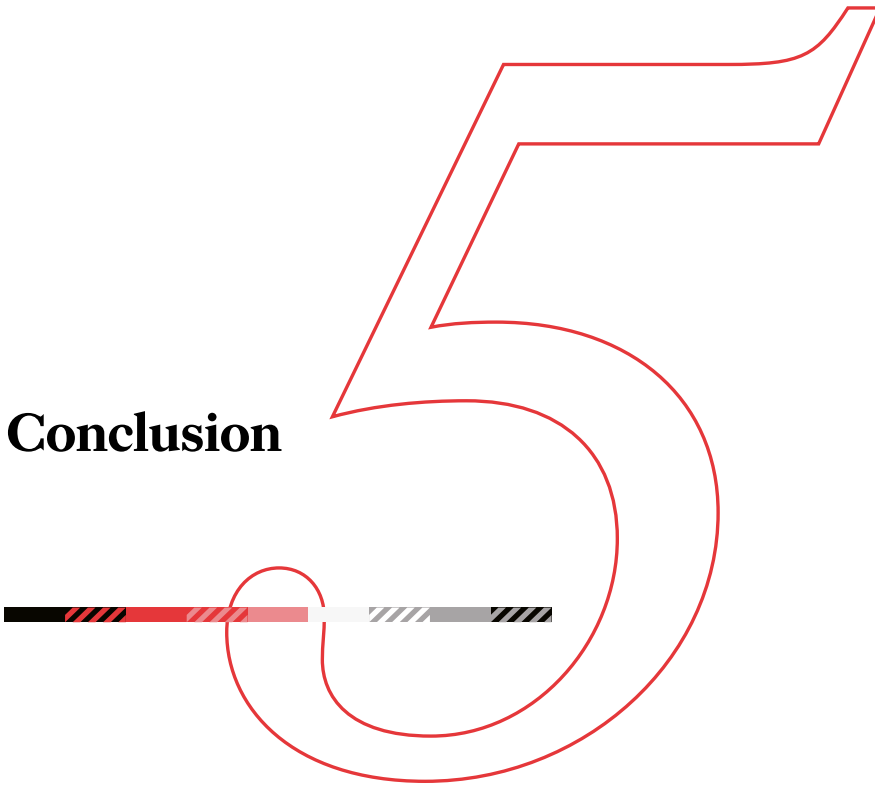
- NZ Prime Minister Jacinda Ardern is easily the most believable politician in the research.
- US President Joe Biden is more believable than Donald Trump, but fails to inspire confidence.
- UK Prime Minister Boris Johnson is almost as unpopular as Clive Palmer.

	SCOTT MORRISON	ANTHONY ALBANESE	AUS POLITICIAN RANGE	JACINDA ARDERN
Shared Values	17	18	8-18	41
Relevance	16	19	8-19	46
Factual Correctness	17	18	9-20	43
Commitment	18	19	9-23	49
Integrity	18	19	8-20	48
Affinity	20	20	8-20	44

Other global leaders fared poorly, with US President Joe Biden scoring relatively well on commitment (19 per cent) but below both of Australia's main candidates on other attributes. Former US President Donald Trump scrapes into double digits across all attributes, again with commitment (12 per cent) as his strongest. UK Prime Minister Boris Johnson scored 10 per cent for commitment, failing to reach double digits for any other attribute.



Conclusion



Momentum shift

The results of this year's Believability Index show that Opposition Leader Anthony Albanese is Australia's most believable politician. His believability score is two points higher than 2019, and six points higher than his predecessor Bill Shorten. PM Scott Morrison has seen his score fall by two points during the past three years. How will this swing play out as he becomes the first PM since John Howard to last a full parliamentary term before facing the electorate?

Is the PM out of touch?

Australians view Prime Minister Scott Morrison as committed to his values, but he's unpopular with female and regional voters. Suggestions that he's out of touch, especially in the campaign that will focus on the economy and cost of living, will be of particular concern for the party, with many remembering this was the reason John Howard lost to Kevin Rudd in 2007.

Unknown by the undecided

Opposition Leader Anthony Albanese is an unknown entity with 15 per cent of voters. This issue is even more pronounced among voters who are undecided, and younger voters who are more likely to vote Labor. Supporters will be encouraged by his popularity in WA, but concerned by his failure to win over Queenslanders.

Economy over environment

Australians are most concerned about economic issues heading into the election – with older voters focused on the cost of living, while younger voters worry more about housing affordability. Despite the fires and floods experienced in recent years, and worries about energy reliability, climate change is a relatively low priority as the nation prepares to head to the ballot box.


McGowan makes his mark

Pandemic health management has made the state premiers much more visible than in the past. Lengthy lockdowns and border closures alienated many voters, but refusal to be swayed by popular opinion has also been seen as a sign of strength. WA Premier Mark McGowan is Australia's most believable state leader, while Victoria's Dan Andrews has the strongest personal brand.





Diagnose your believability



Ogilvy PR and Lightspeed work with leaders, brands and organisations to assess their believability. The Believability Index research methodology surfaces perceptions that inform the development of purpose and thought leadership platforms, leader profile building, corporate social responsibility strategies and stakeholder engagement.


The Believability Index will provide you with organisational, brand and leadership scores, exploring the perception of audiences that matter most to you. We'll help you craft a point of difference that makes the most of your strengths and addresses perceived weaknesses to move you forward.

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About Ogilvy PR



Ogilvy PR is a modern, global creative communications agency that partners with brands and organisations to drive value and growth. We build brands, protect reputations, and earn attention and influence through creative storytelling informed by data, and fuelled by technology.

Our specialist practice areas offer media relations, social and digital communications, external and internal stakeholder communications, government relations, issues and crisis management, influencer marketing and sales enablement across audiences and sectors. We work with some of Australia's most high-profile organisations to develop their communications strategies and deliver creatively-led campaigns that drive business outcomes.

We are the region's largest and most specialised public relations and public affairs consultancy. Established in 2001, we have more than 120 communication specialists in Australia and New Zealand across offices in Sydney, Melbourne, Canberra and Auckland.



Ogilvy