

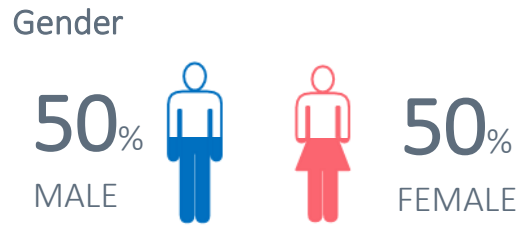
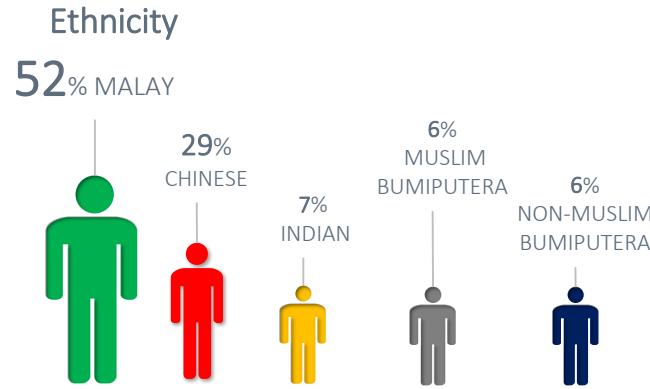
100 Days of the PH Government Post Election Assessments

Survey Period : 7 – 14 August 2018



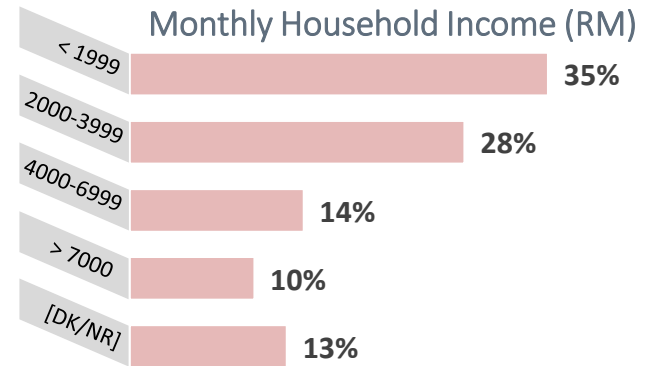
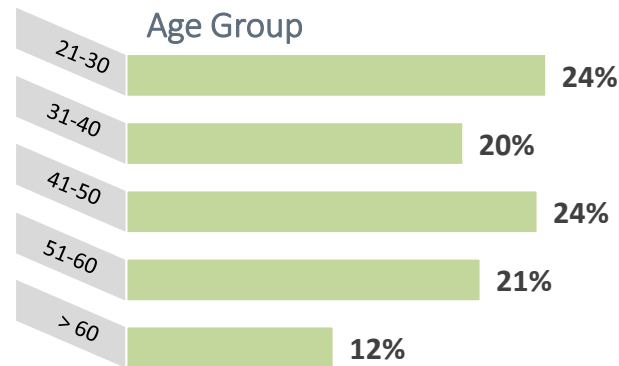
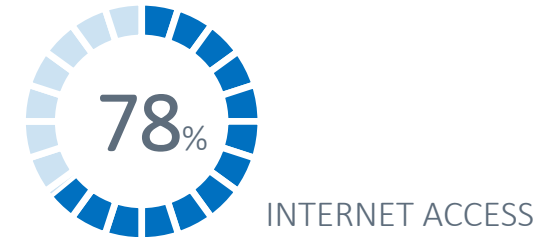
Standard Survey Methodology & Respondent Profiles

- **1,160** voters aged 21 and above were interviewed via telephone (fixed and mobile lines)
- The survey respondents are from all states across Peninsular Malaysia includes Sabah and Sarawak
- Voters were selected through random stratified sampling method along the lines of ethnicity, gender, age and parliament constituencies.
- All of the constituencies (**14** states and across **222** parliament constituencies) were surveyed and the selection of the respondents is proportional with respect to the population in each parliament constituency.
- Respondents were interviewed in their own language of preferences
- Survey margin of error estimated at **±2.87%**
- The survey was conducted on **7 – 14 August 2018**



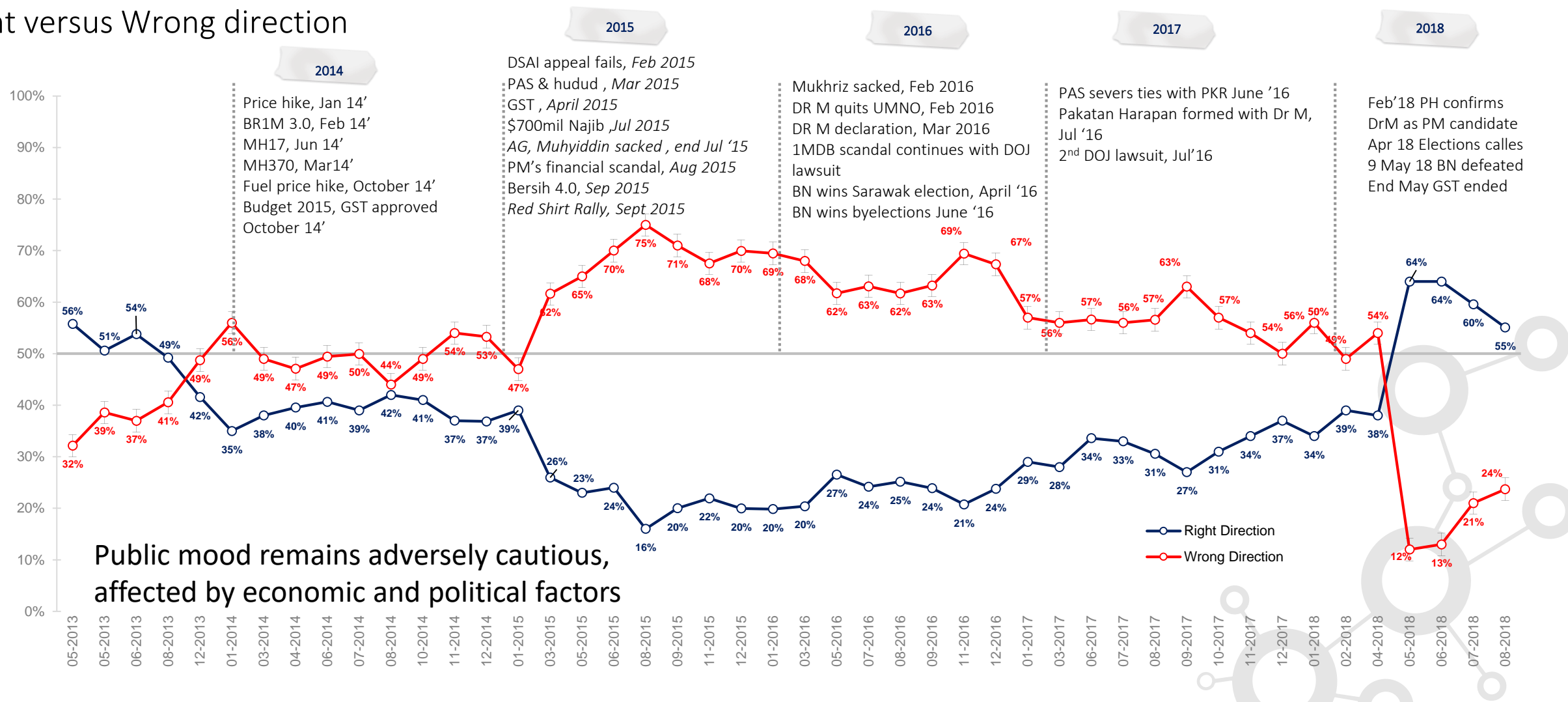
Occupation/ Sector

38%	Private
19%	Self – employed/ business
18%	Homemaker
10%	Retired
8%	Government/ GLC
7%	Student/ Unemployed/ Others



Direction of the Country

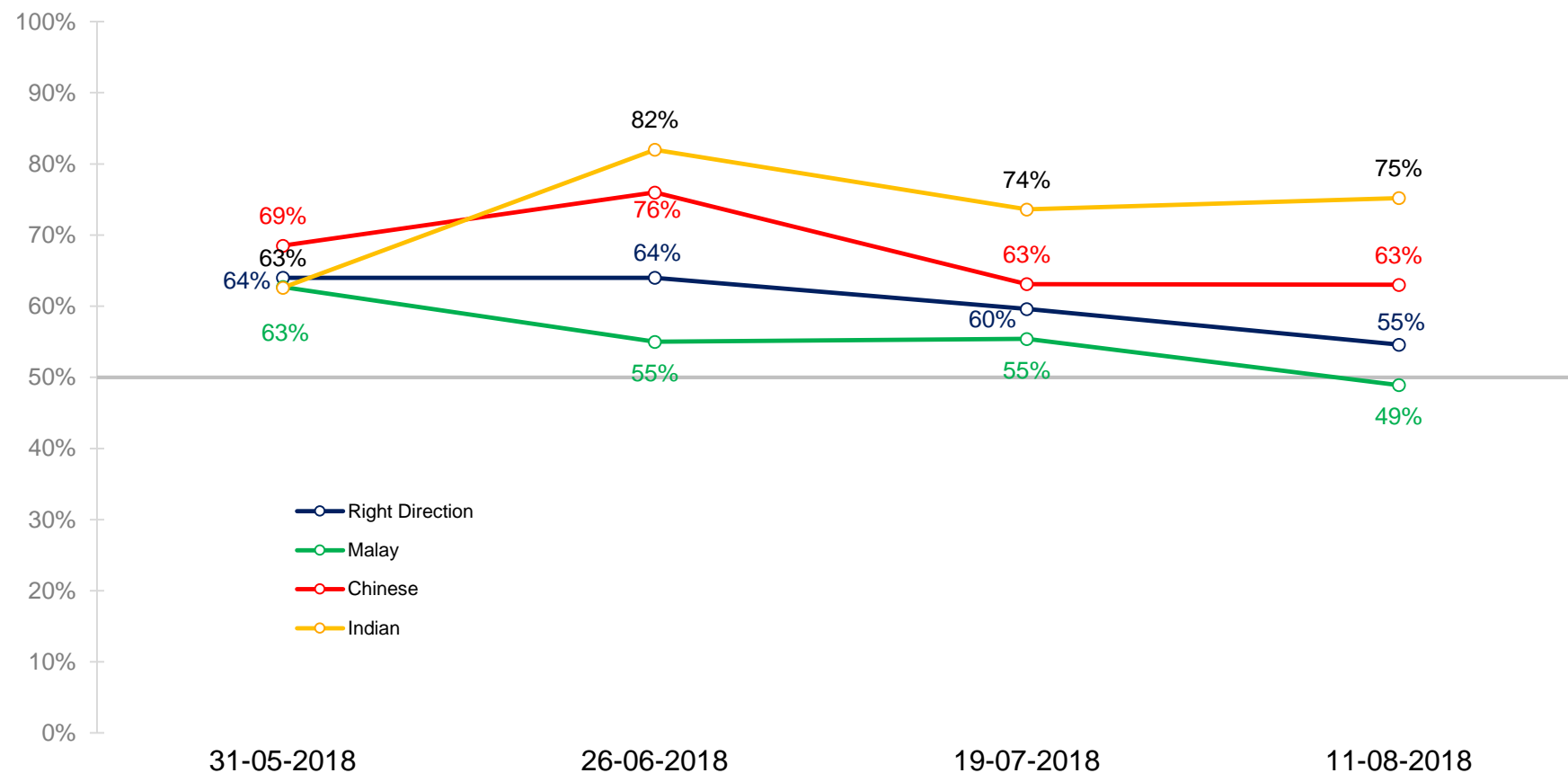
Right versus Wrong direction



Q: Do you feel things in this country are going in the right direction, or do you feel things have gotten on the wrong direction?

Direction of the Country

Right direction across Ethnicity



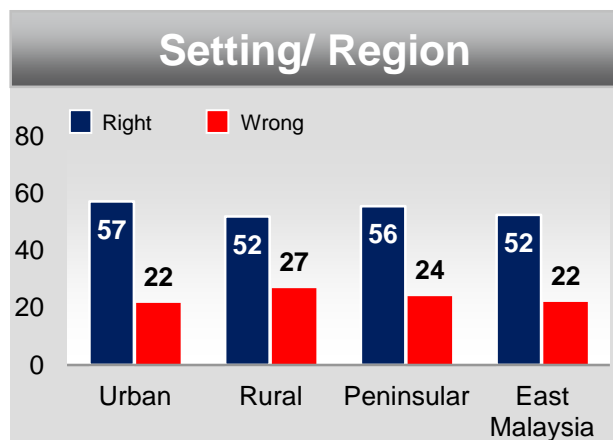
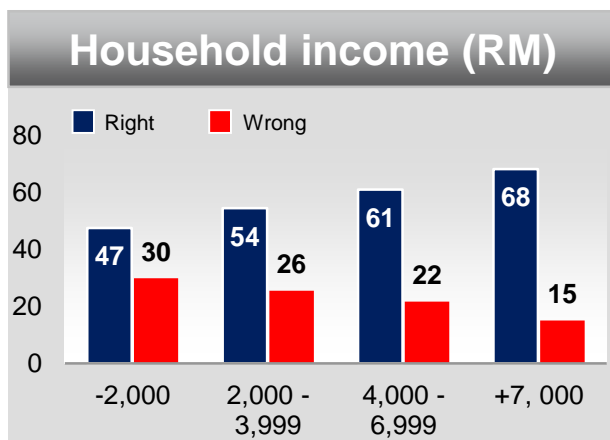
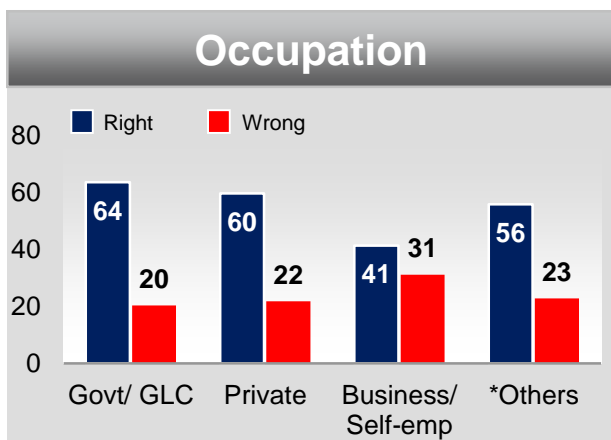
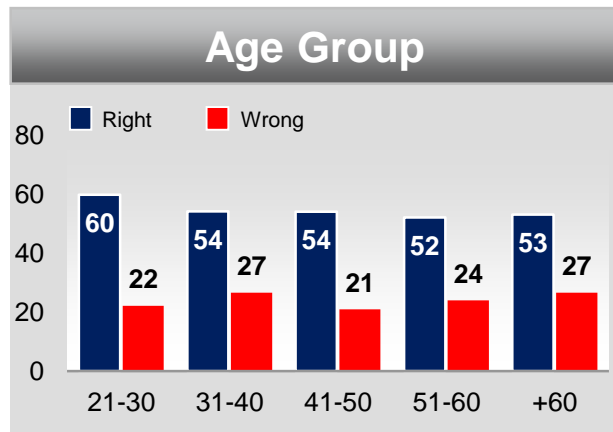
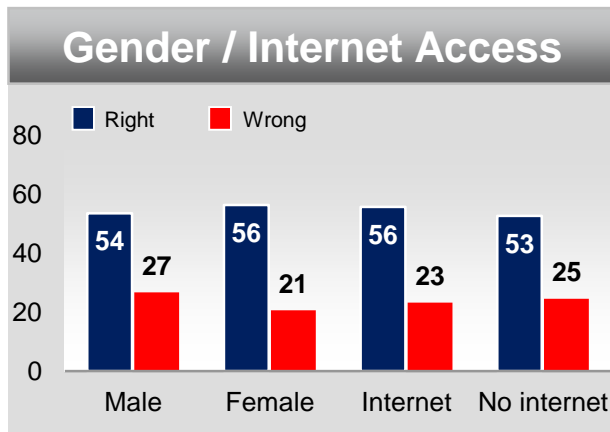
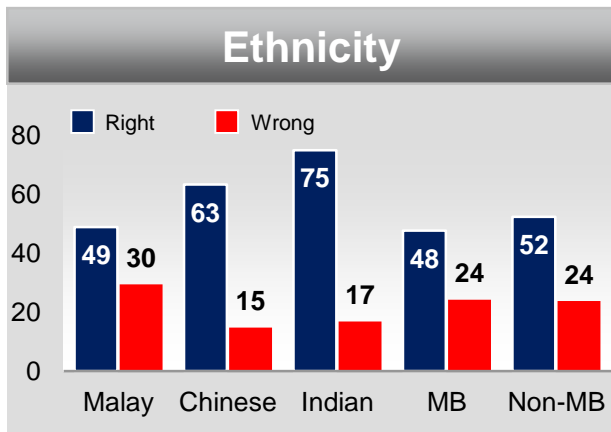
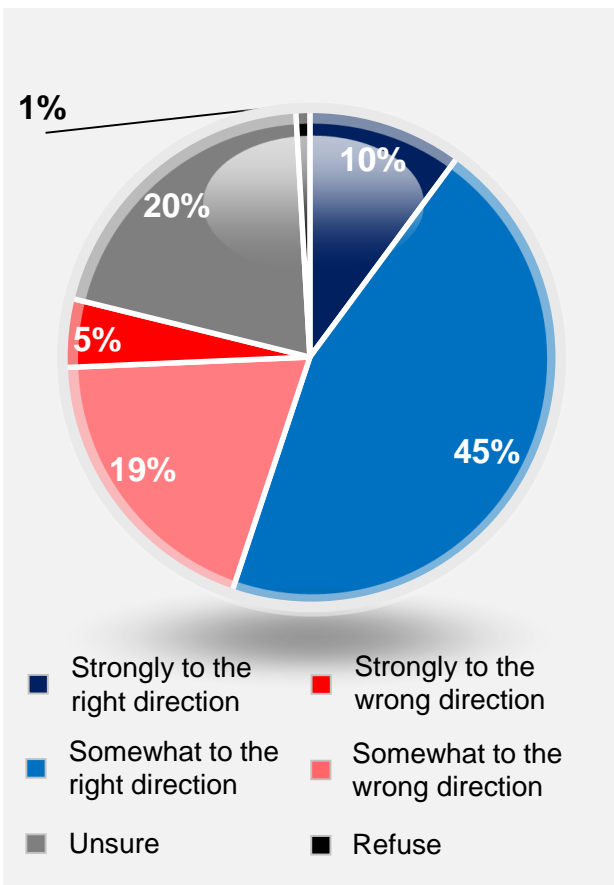
Notes

Malay voter sentiments sliding below 50% for first time since GE14. Likely over continued economic concerns (palm oil prices) and heightened use of race and religious rhetoric by Opposition.

Non Malay sentiments stable.

Q: Do you feel things in this country are going in the right direction, or do you feel things have gotten on the wrong direction?

Direction of the Country

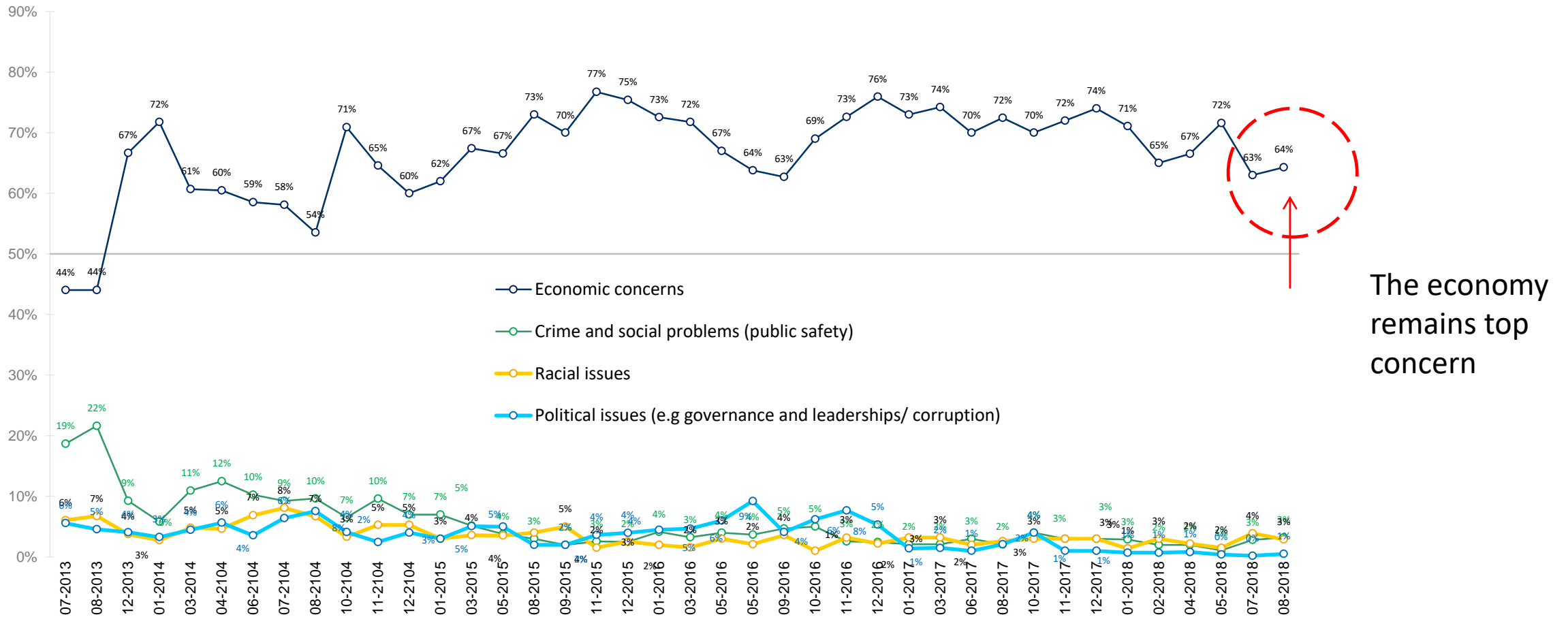


* Homemaker, Retired, Students, Unemployed

Q: Do you feel things in this country are going in the right direction, or do you feel things have gotten on the wrong direction?

Top Voter Concern

Top of Mind Concern: The Economy



The economy remains top concern

Q: Being as specific as you can, what is the number one problem facing people in this country today? (open-ended)

Direction of the Country

Right Direction

(n=639, 55%)

Good national/state administration – 19.0%
 Good national/state policy and concept – 0.1%
 Efficiency of the national/state administration – 0.1%
 Experienced in administration – 0.1%

Favourable economic condition in general – 11.4%
 Economic development – 0.8%
 Improving economy – 0.2%

Fighting Corruption – 6.6%

Quality of national/state leadership (positive) – 4.1%
 Welfare to the people – 1.2%

Rapid or good development – 2.5%

Administration

19%

Economy
Concerns

12%

Corruption

7%

Leadership

7%

Development &
infrastructure

3%

Unsure/ Refuse

19%

Wrong Direction

(n=275, 24%)

29%

Economic Concerns

14%

Leadership

12%

Administration

6%

Politics

5%

Racial

12%

Unsure/ Refuse

- Unfavourable economic condition in general-14.1%
- High cost of living/inflation-7.8%
- Lower income/Minimum income/wages issues-1.7%
- Implementation of GST / other taxes-1.8%
- Lack of business opportunities – 1.1%
- Federal budget deficit/federal debt-0.7%
- Oil prices-0.4%
- Weakening of ringgit-0.4%
- Unemployment/Jobs-0.4%

- Quality of national/state leadership (negative) – 4.8%
- Not fulfilling promises – 4.2%
- No welfare to the people-3.1%

- Poor administration – 12.0%
- Non-Islamic national/state leadership – 0.4%

- Political instability in general– 6.0%

- Malays rights & privileges – 1.8%
- Racial inequality– 1.7%
- Worse ethnic relations– 1.4%

Q: Considering the condition in the country today, would you say that things are heading in the right direction or wrong direction? Why do you say so?

Important Issues

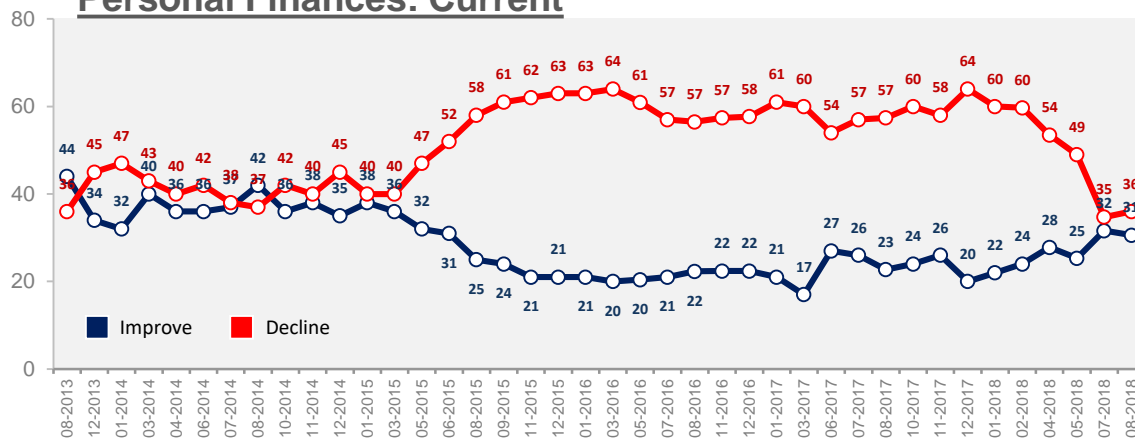
Issues	Total (April 2018)	Total (August 2018)	Malay	Chinese	Indian	Muslim Bumiputera	Non Muslim Bumiputera
Inflation	57%	50%	54%	39%	55%	52%	55%
Corruption	37%	32%	25%	48%	23%	30%	31%
Preservation of Malay rights/Fair treatment of all races	12%	21%	18%	29%	27%	11%	21%
Job opportunities	21%	21%	23%	11%	32%	33%	21%
Housing	15%	15%	15%	9%	31%	21%	9%
Worse race relations	5%	9%	9%	9%	6%	4%	14%
Political instability	10%	9%	11%	6%	2%	14%	8%
1MDB case	6%	7%	7%	9%	3%	4%	6%
The allegations against the integrity of Najib Razak	6%	6%	4%	9%	8%	6%	0%
Weakness of the leadership	7%	5%	6%	2%	1%	2%	8%
Implementation of Hudud law	3%	4%	6%	2%	0%	0%	0%
Public transportation	2%	4%	3%	6%	0%	1%	8%

Q: From the following, please choose two (2) current issues that are most important to you at present?

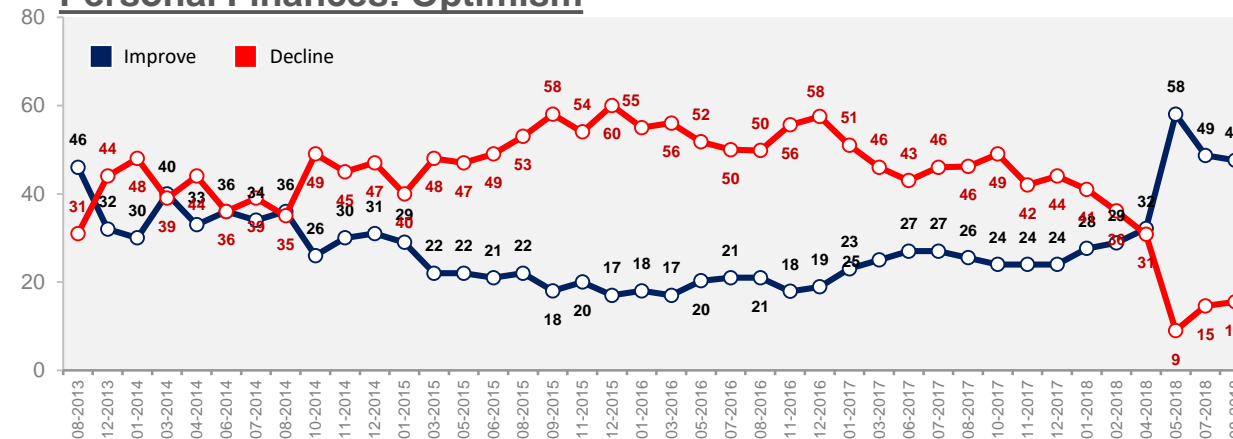
General Economic Sentiments

% respondents expressing “favorable vs unfavorable”

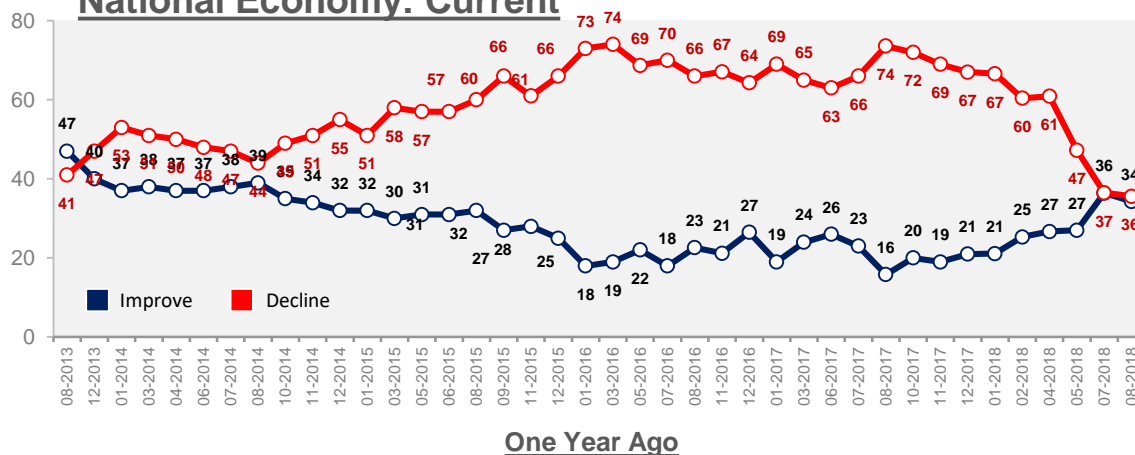
Personal Finances: Current



Personal Finances: Optimism

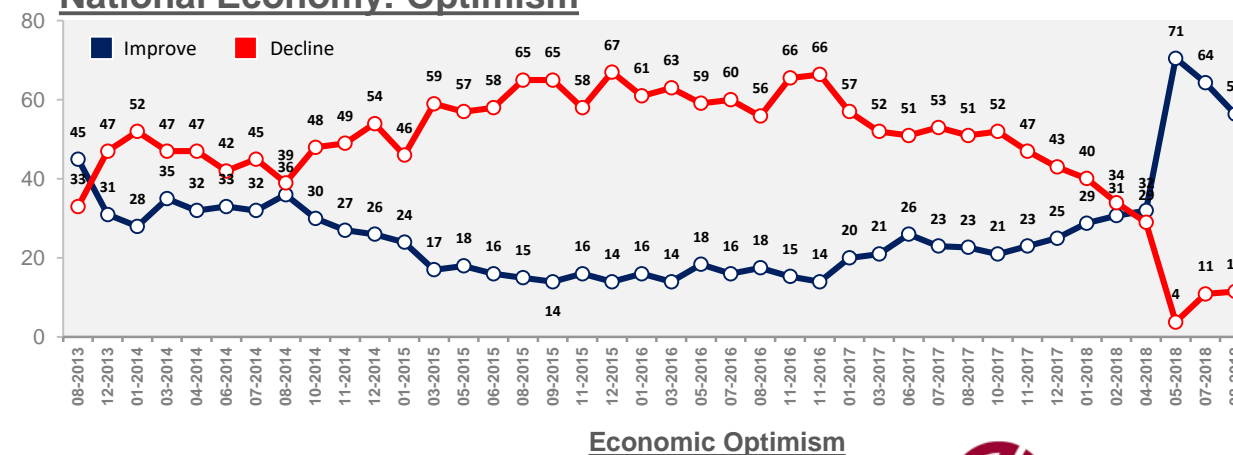


National Economy: Current



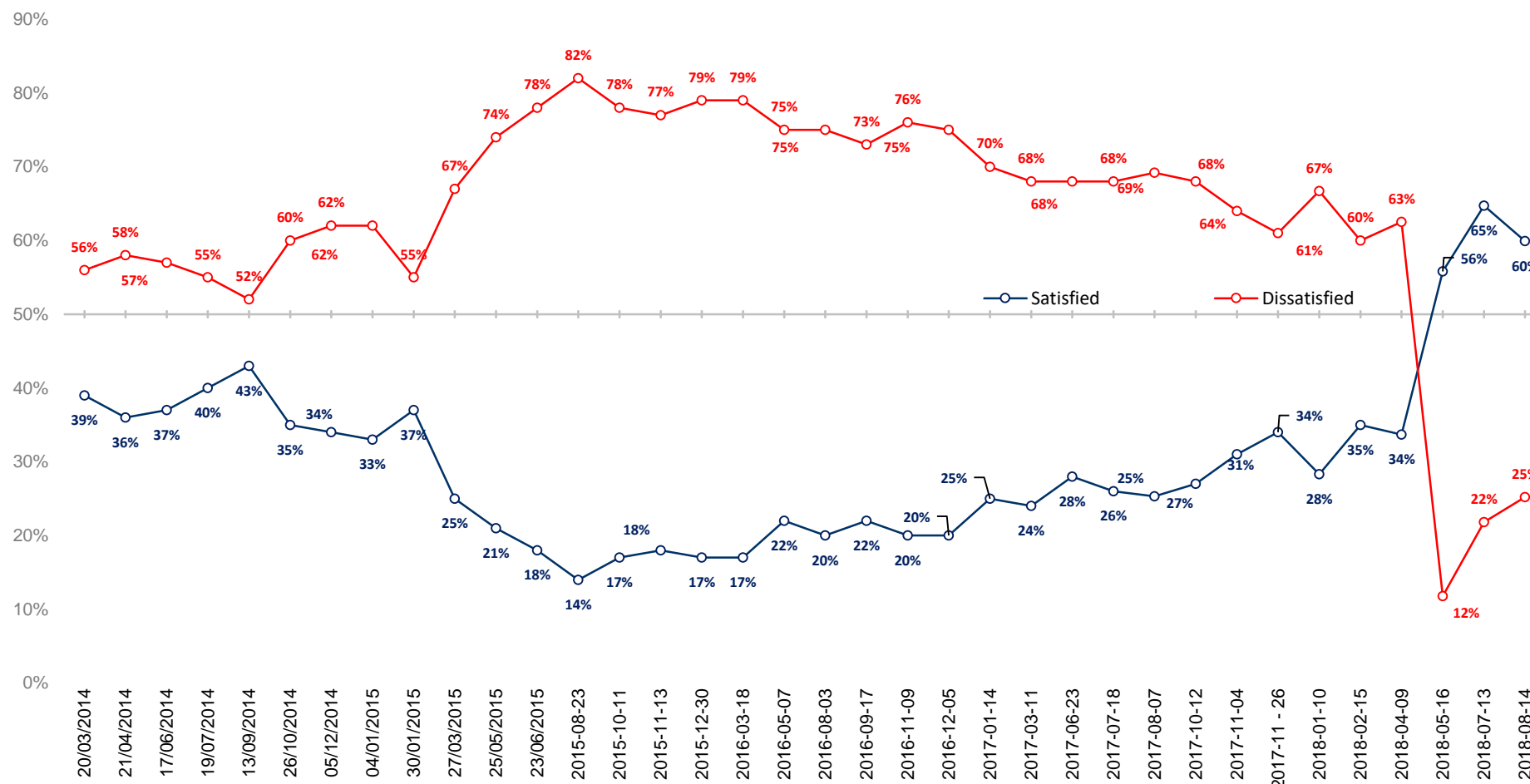
One Year Ago

National Economy: Optimism



Economic Optimism

Confidence in Govt Economic Management

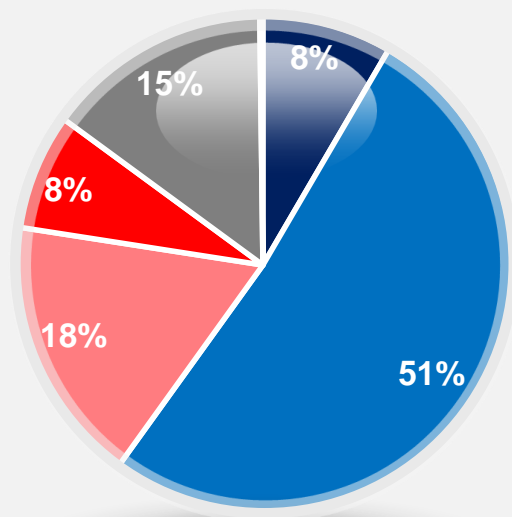


New administration has higher public confidence in its ability to address economic challenges

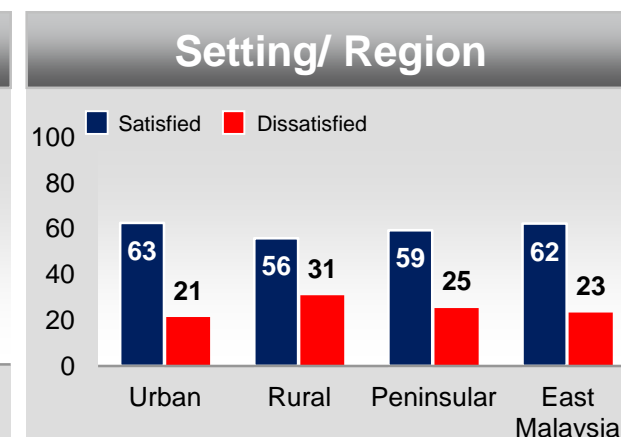
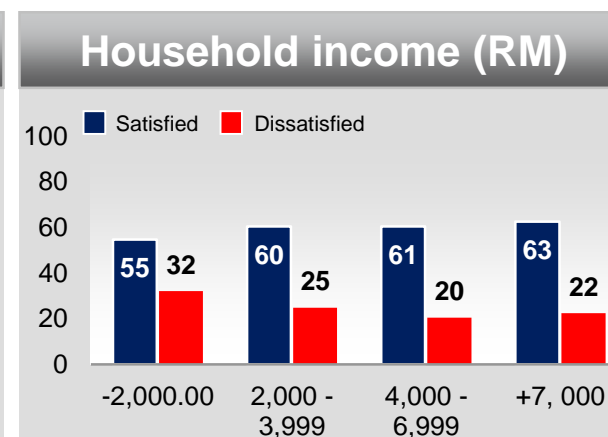
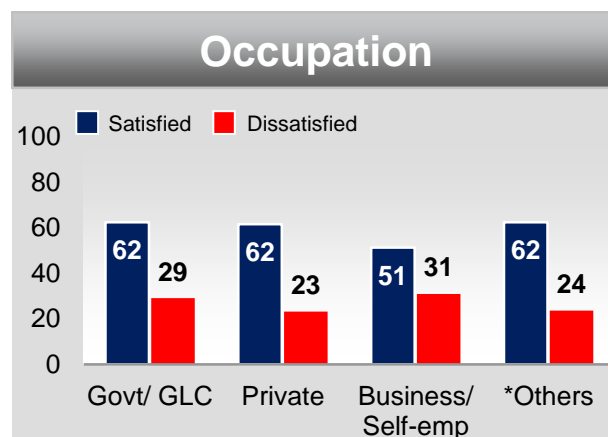
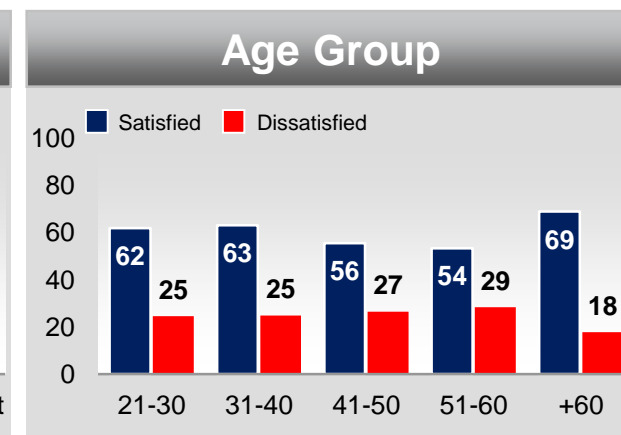
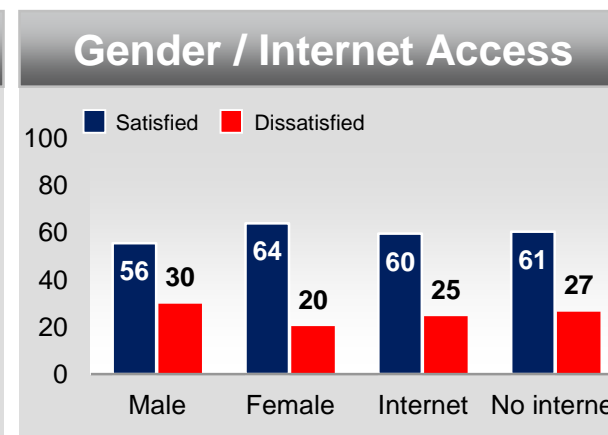
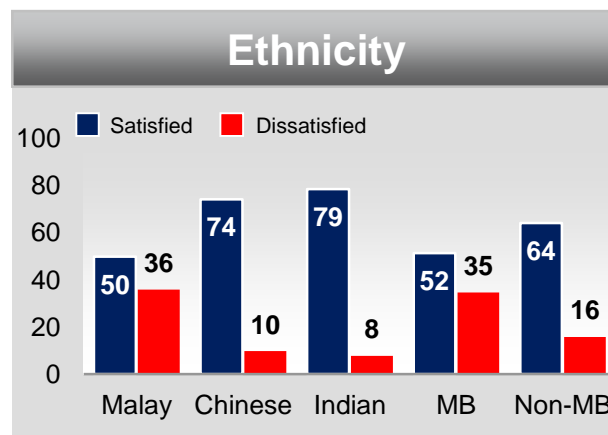
Q: How satisfied or dissatisfied are you with the way the government managing the economy at present?

Govt Managing the Economy

Satisfaction towards govt managing the economy



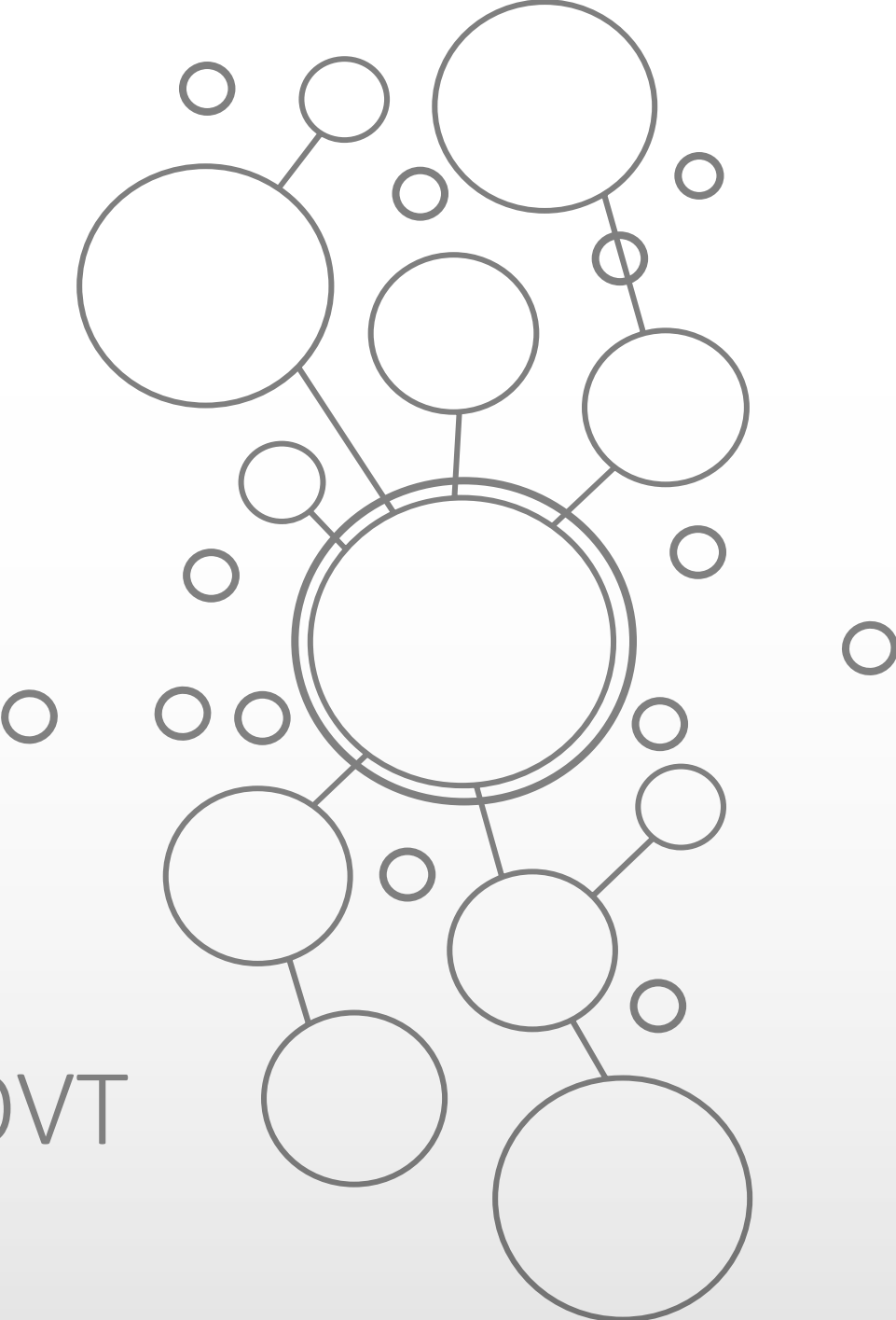
- Very satisfied
- Somewhat satisfied
- Unsure
- Very dissatisfied
- Somewhat dissatisfied
- Refuse



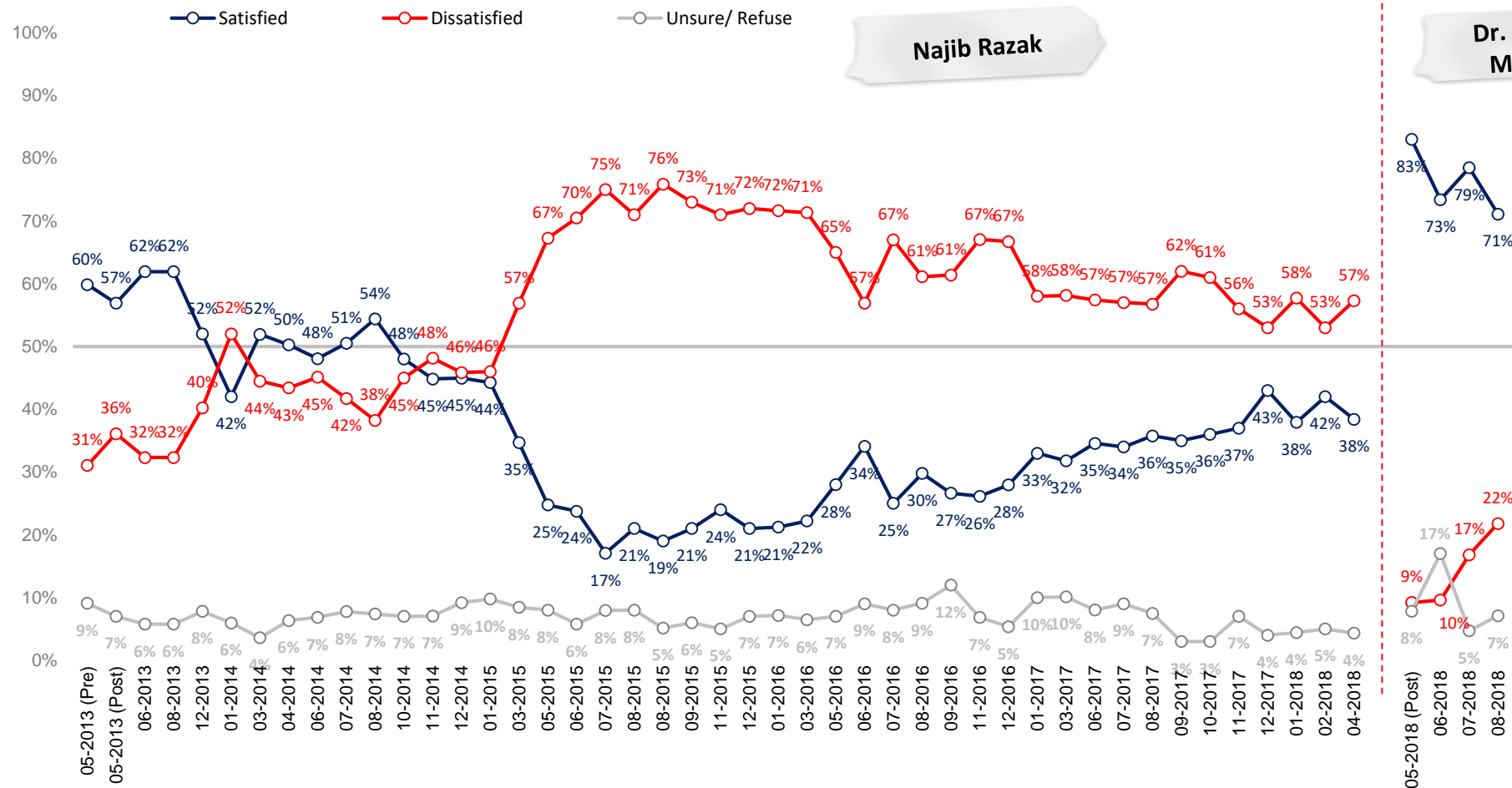
* Homemaker, Retired, Students, Unemployed

Q: How satisfied or dissatisfied are you with way the government managing the economy at present?

PERCEPTIONS TOWARDS
PRIME MINISTER & FEDERAL GOV'T



Prime Minister Approval Rating

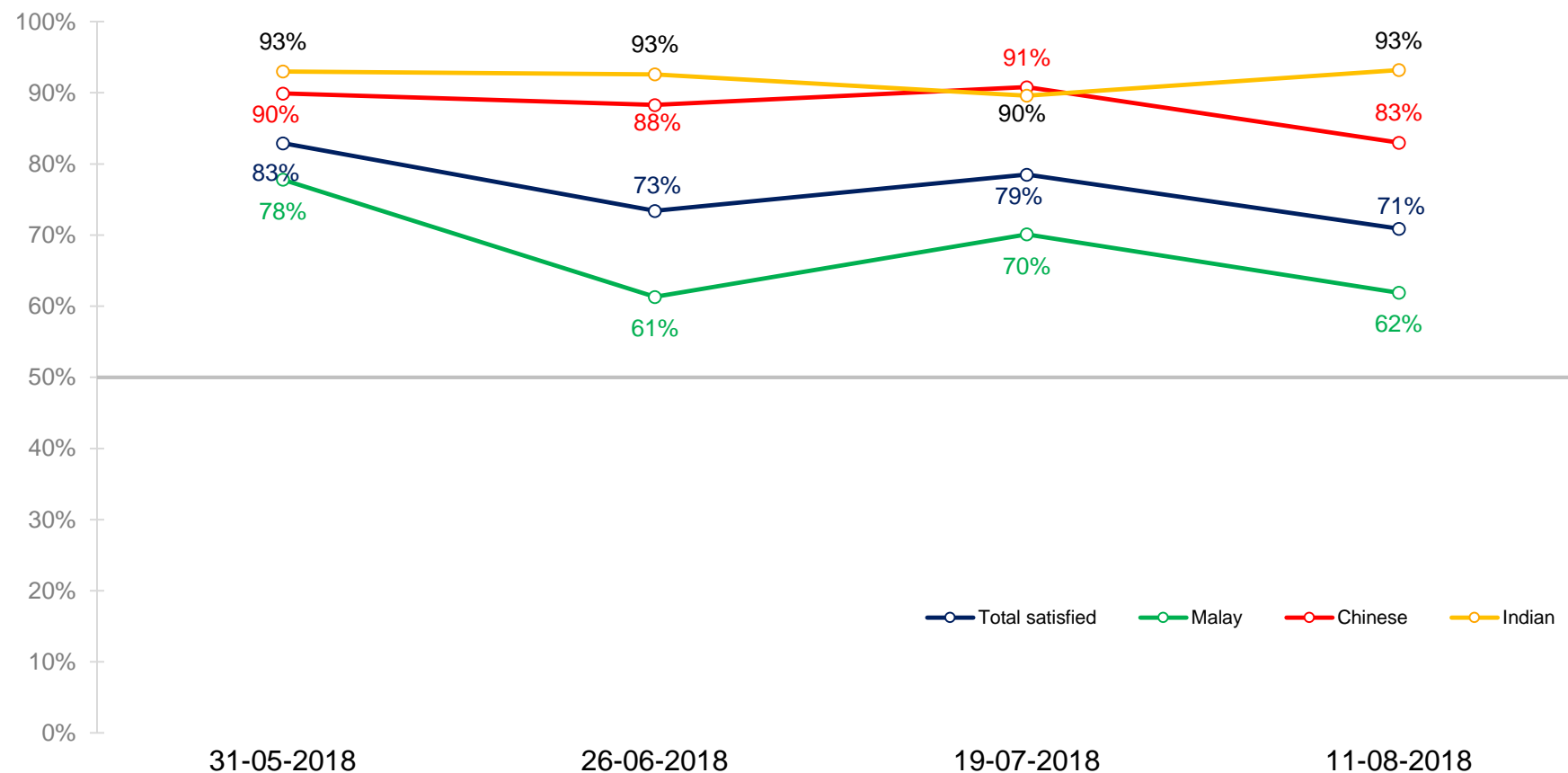


Q: How satisfied or dissatisfied are you with the performance of Tun Dr. Mahathir Mohamad as 7th Prime Minister of Malaysia?

Dr Mahathir Approval Rating

Satisfaction towards Dr Mahathir across Ethnicity

% respondents expressing “Satisfied”



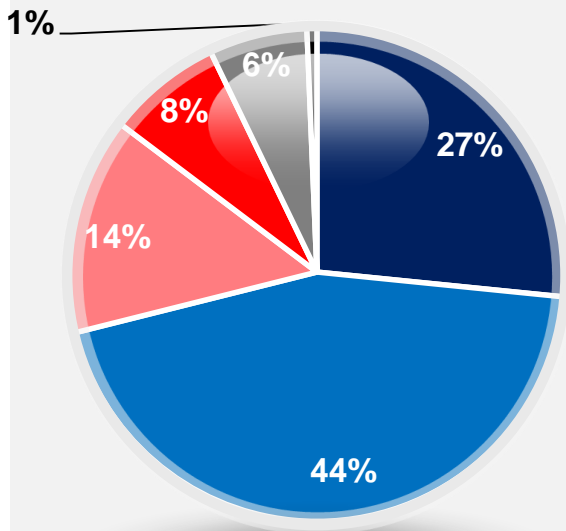
Notes

Dr M's ratings among non-Malay voters higher than Malay voters. Numbers significantly improved upon appointment as PM.

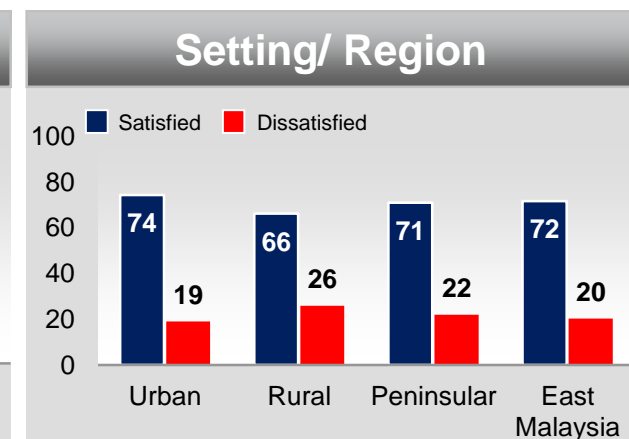
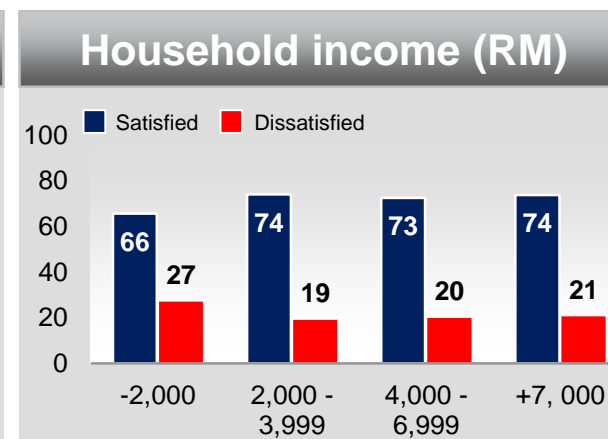
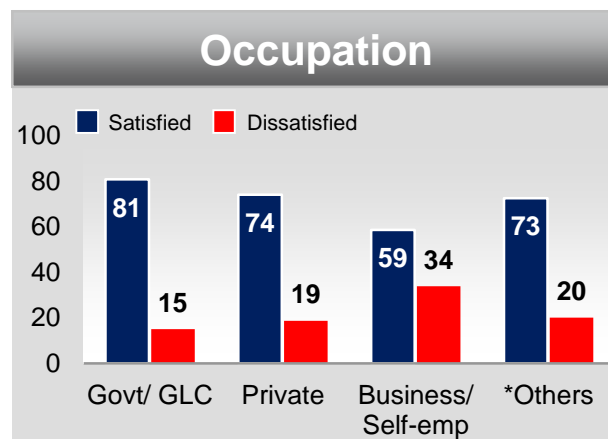
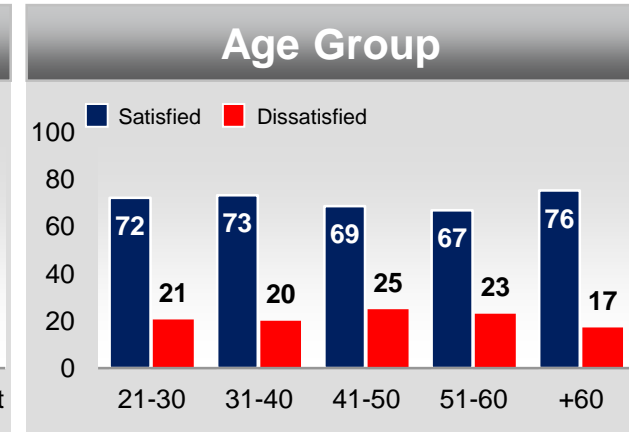
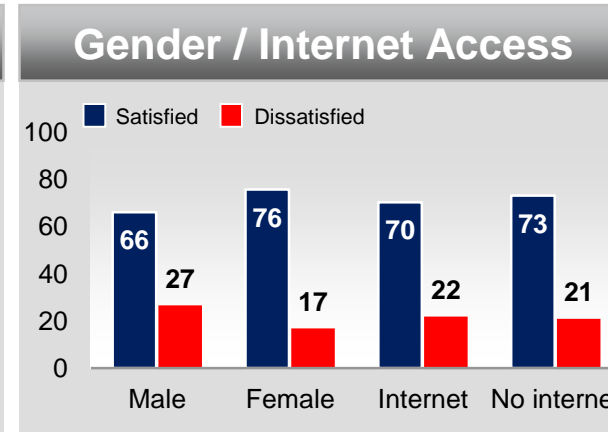
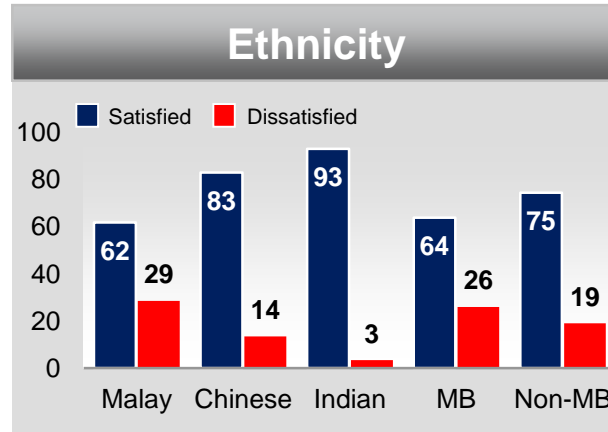
Q: How satisfied or dissatisfied are you with the performance of Tun Dr. Mahathir Mohamed as the Prime Minister of Malaysia?

Note: Between June 2017 and May 2018, question was worded as “leader of the Opposition”, prior to June 2017, worded as “a national leader”

Satisfaction towards PM - Dr Mahathir



- Very satisfied
- Somewhat satisfied
- Unsure
- Very dissatisfied
- Somewhat dissatisfied
- Refuse

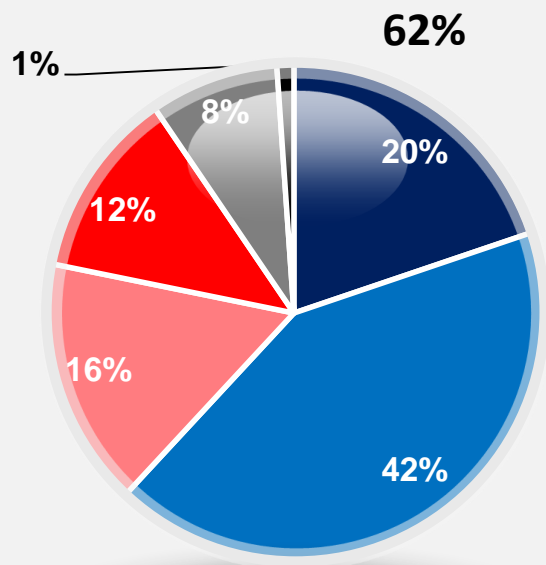


* Homemaker, Retired, Students, Unemployed

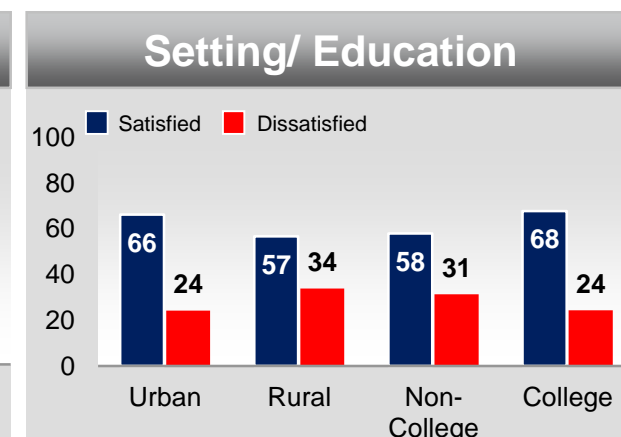
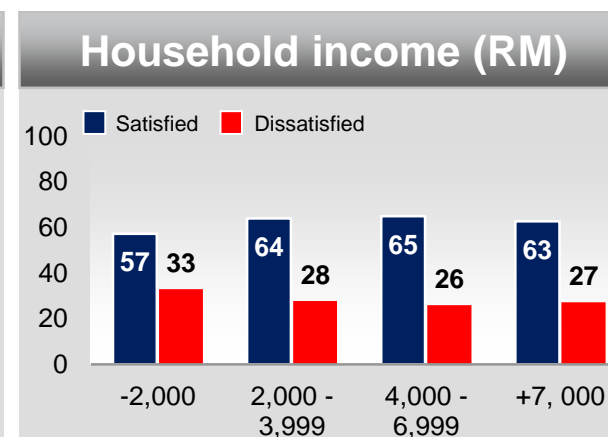
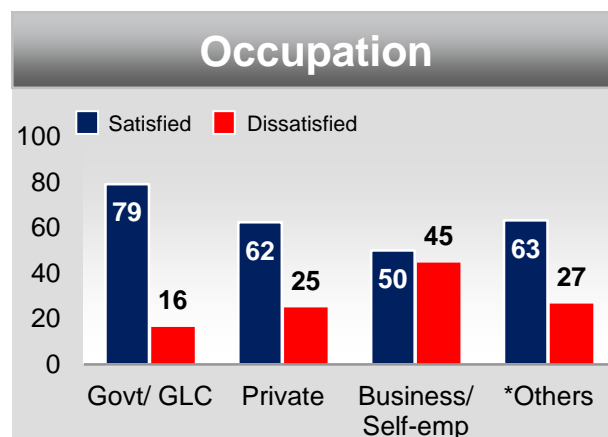
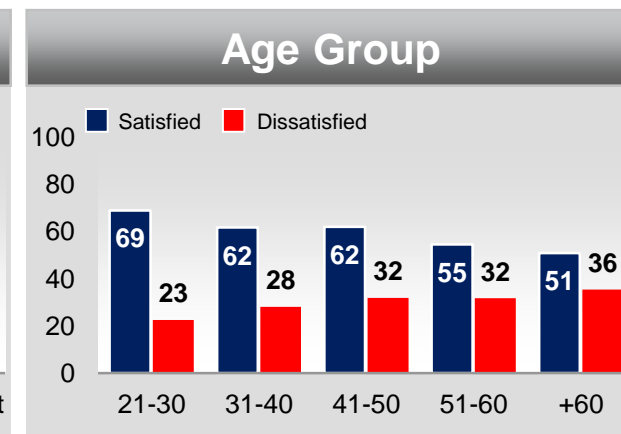
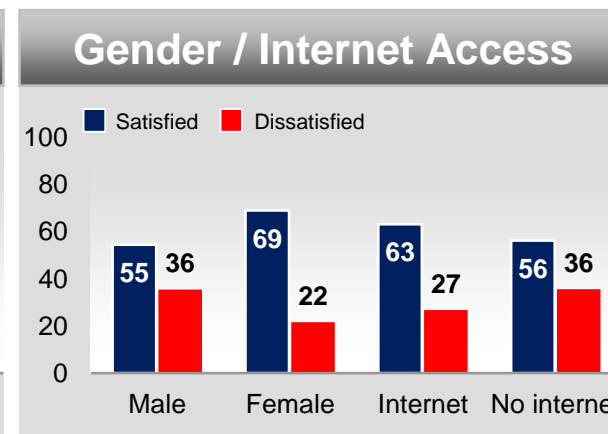
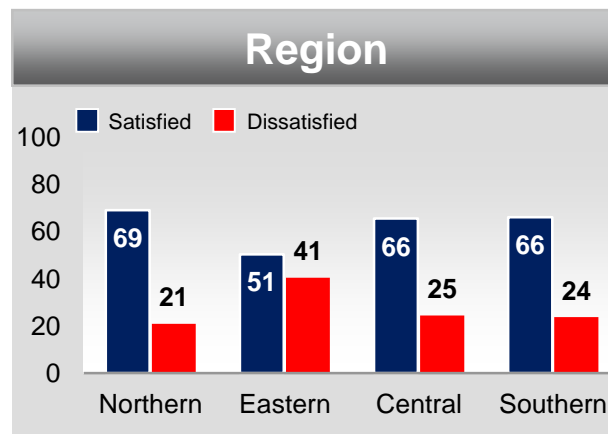
Q: How satisfied or dissatisfied are you with the performance of Tun Dr. Mahathir Mohamad as 7th Prime Minister of Malaysia?

Satisfaction towards Dr Mahathir

Among Malays



- Very satisfied
- Somewhat satisfied
- Unsure
- Very dissatisfied
- Somewhat dissatisfied
- Refuse

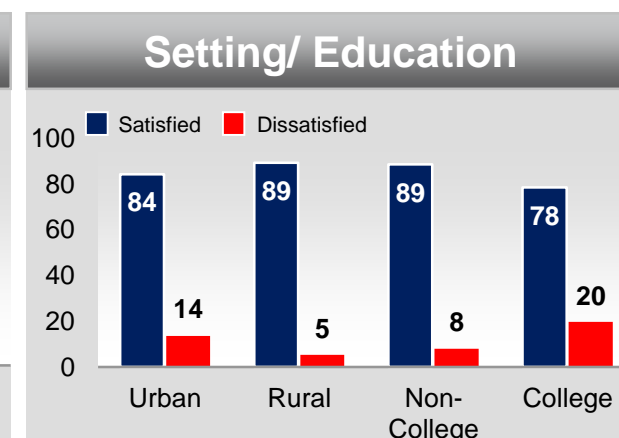
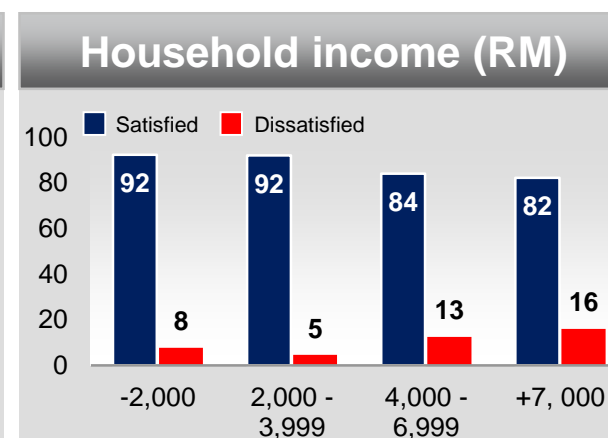
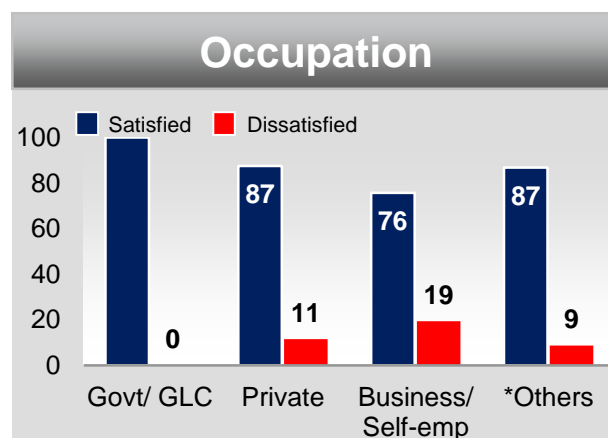
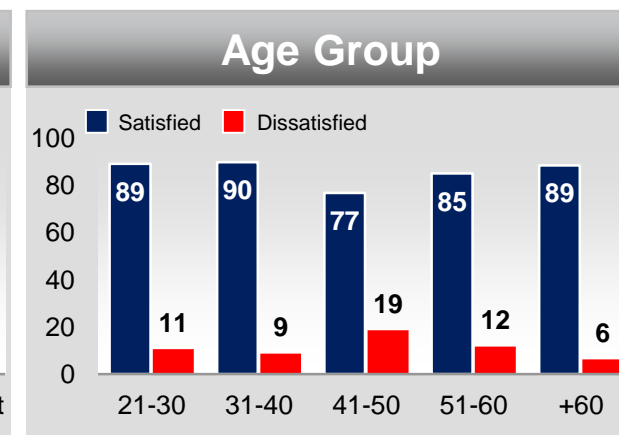
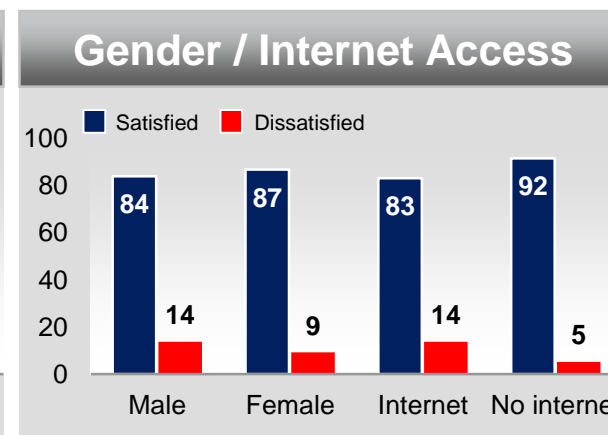
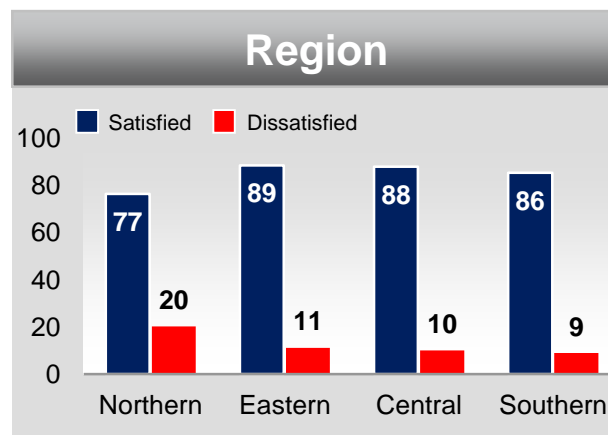
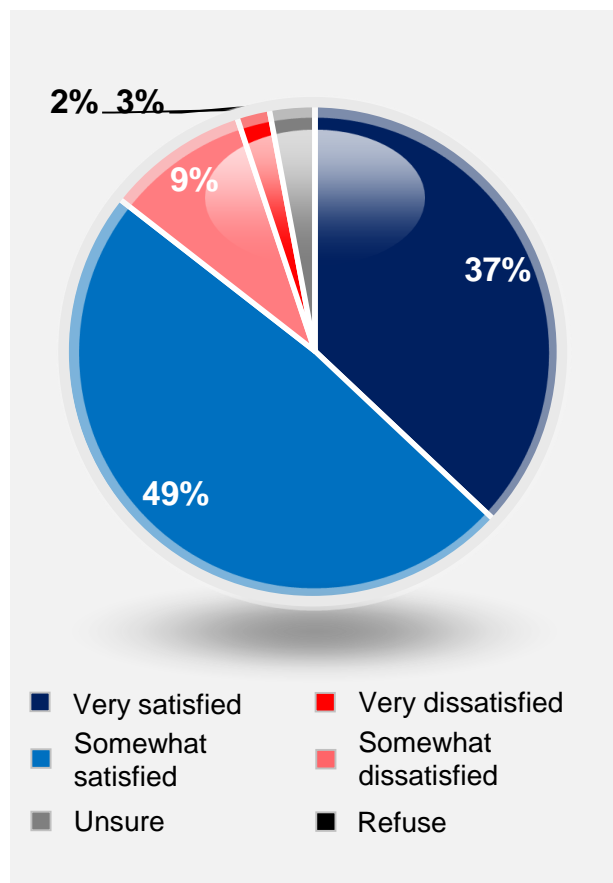


* Homemaker, Retired, Students, Unemployed

Q: How satisfied or dissatisfied are you with the performance of Tun Dr. Mahathir Mohamad as 7th Prime Minister of Malaysia?

Satisfaction towards Dr Mahathir

Among Non-Malays



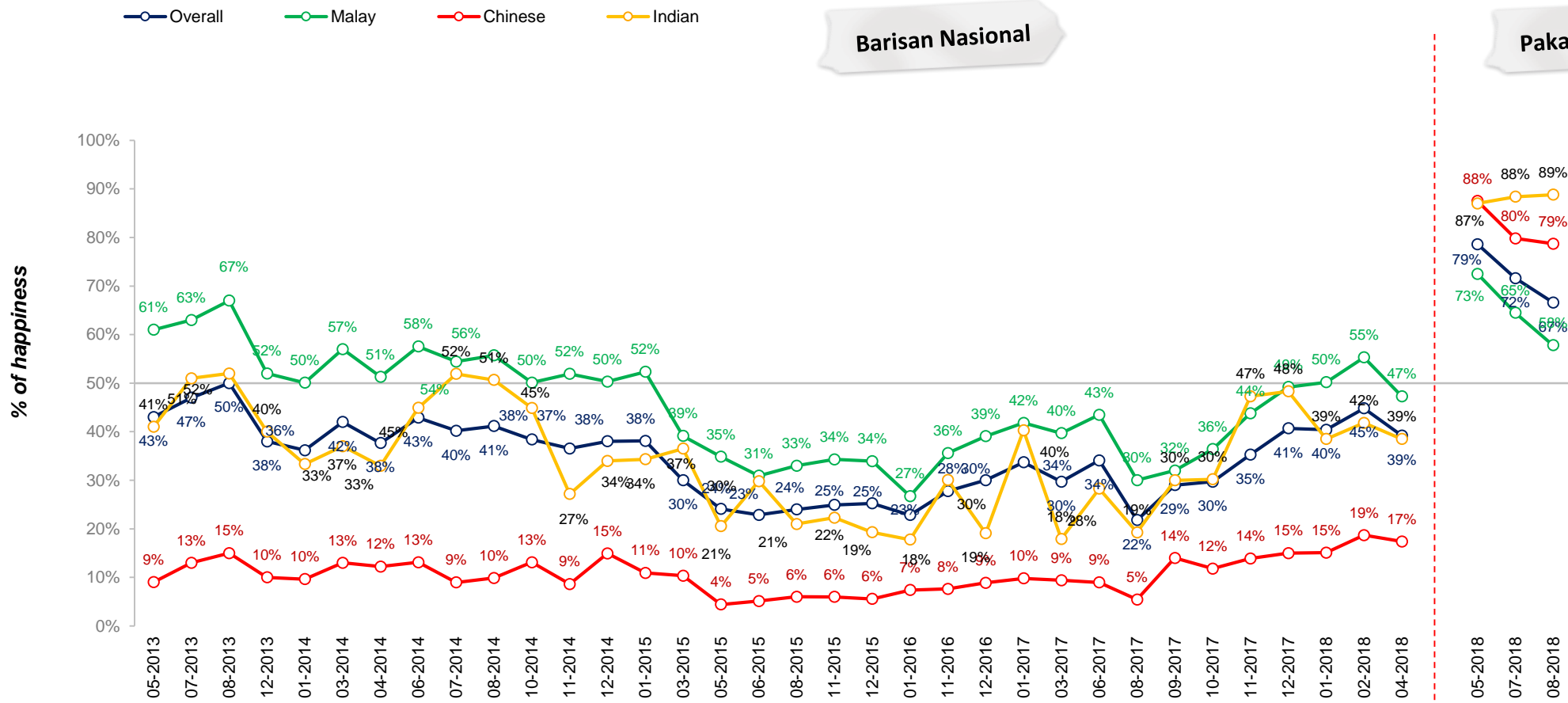
* Homemaker, Retired, Students, Unemployed

Q: How satisfied or dissatisfied are you with the performance of Tun Dr. Mahathir Mohamad as 7th Prime Minister of Malaysia?

Perception towards Federal Govt

Perception towards Federal Govt across Ethnicity

% respondents expressing "happy"

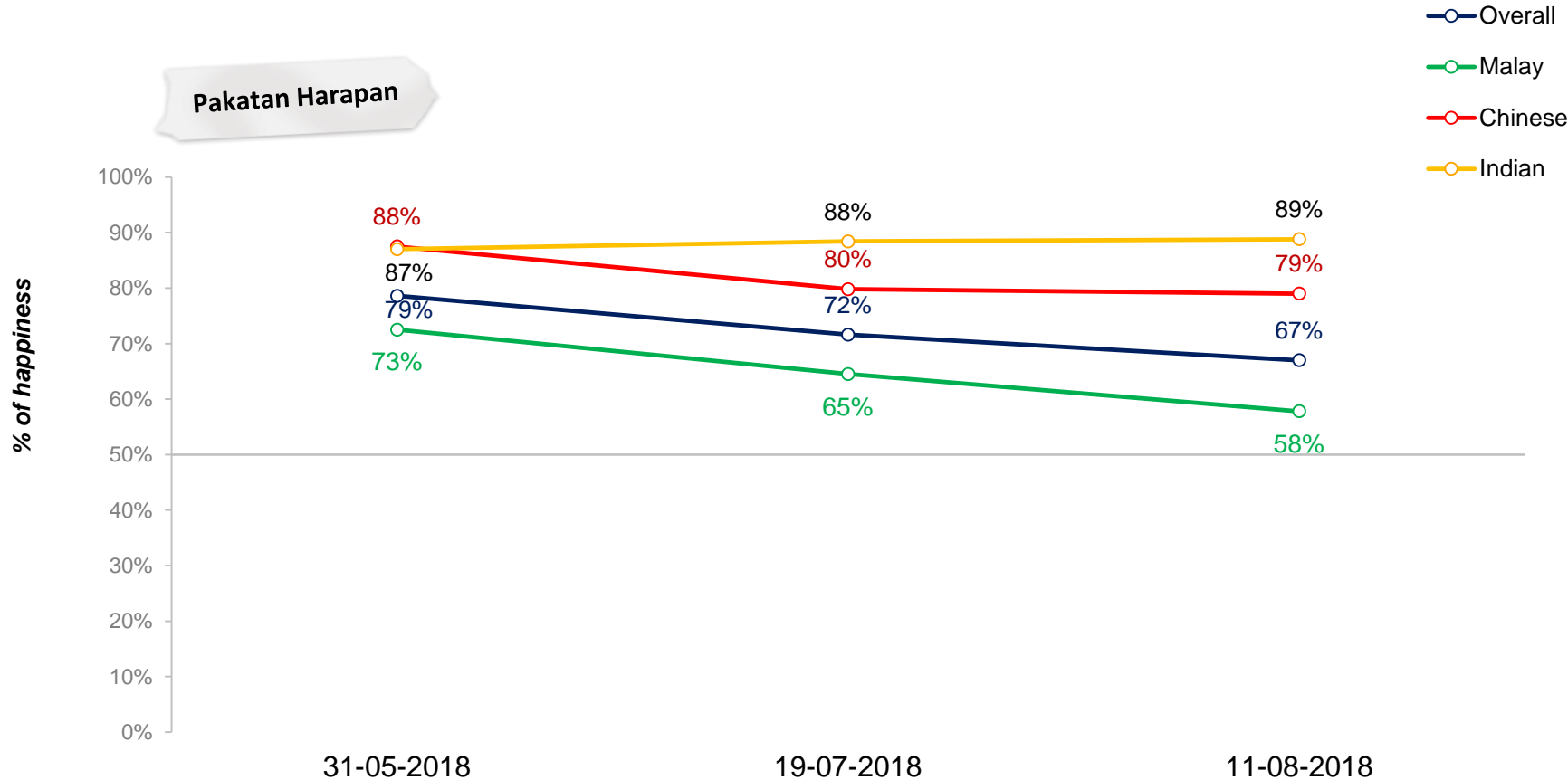


Q: Some people say they are happy with ..., while others are dissatisfied and others say they are angry? Which one best describes how you feel?

Perception towards Federal Govt

Perception towards Federal Govt across Ethnicity

% respondents expressing “happy”



Notes

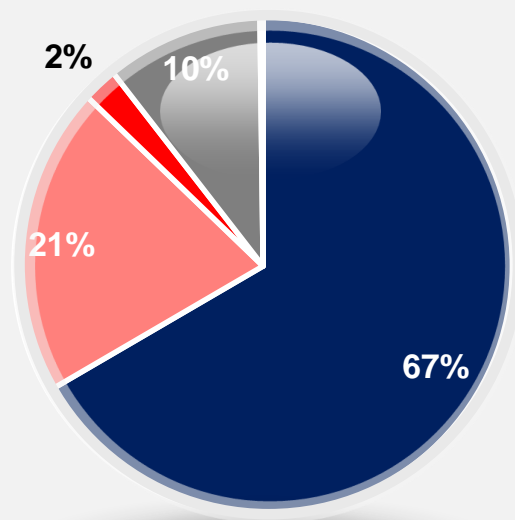
As expected, public acclaim for the PH government has calmed and realities of governing has set in.

Despite the earlier sentiments, public approval for the government remains commendable at 66%.

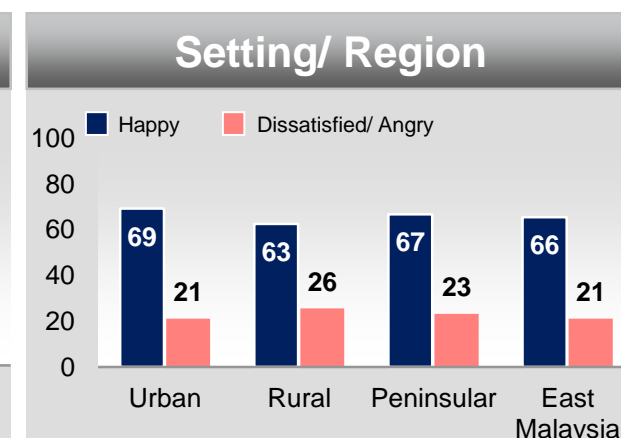
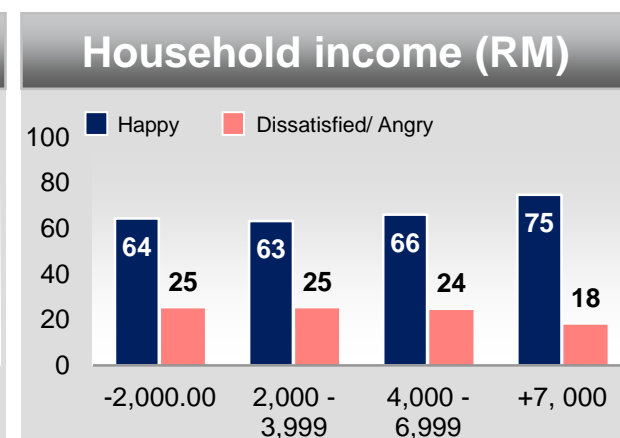
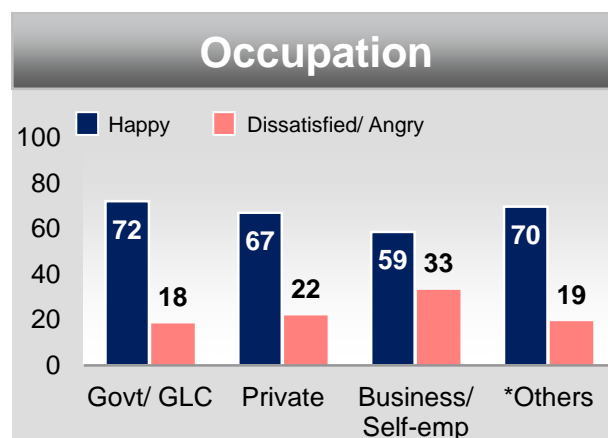
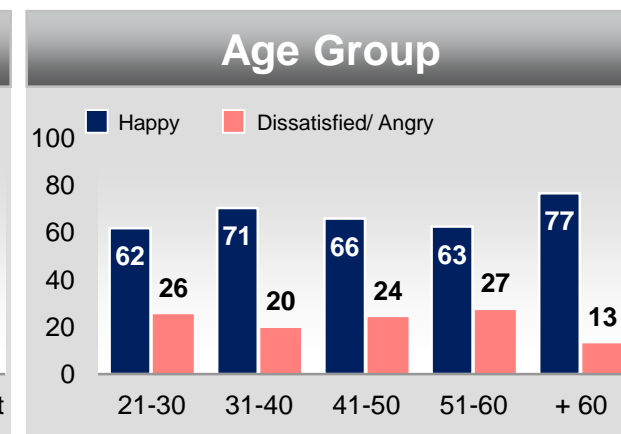
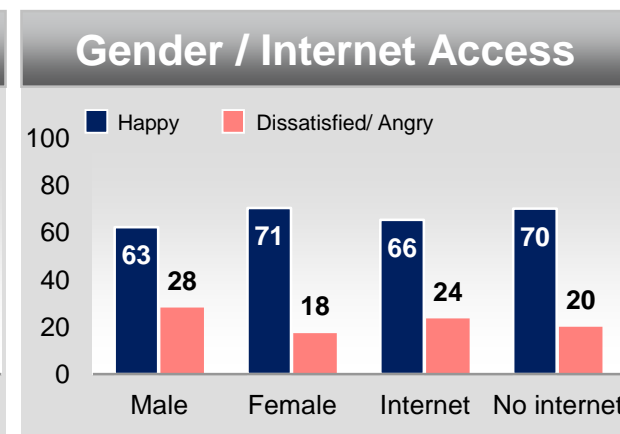
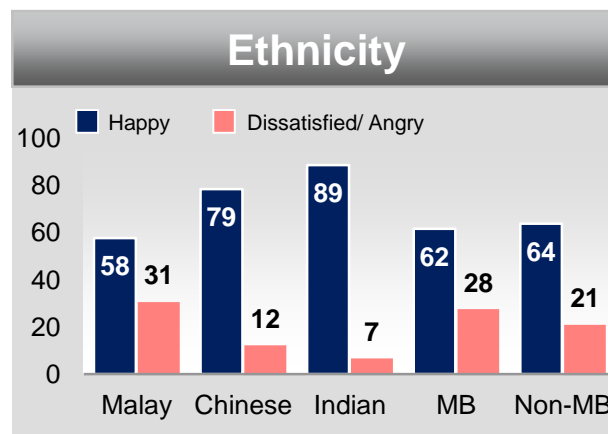
It is also positive among Malay voters at 58%

Q: Some people say they are happy with ..., while others are dissatisfied and others say they are angry? Which one best describes how you feel?

Perception towards Federal Govt



■ Happy ■ Dissatisfied ■ Angry
■ Unsure ■ Refuse

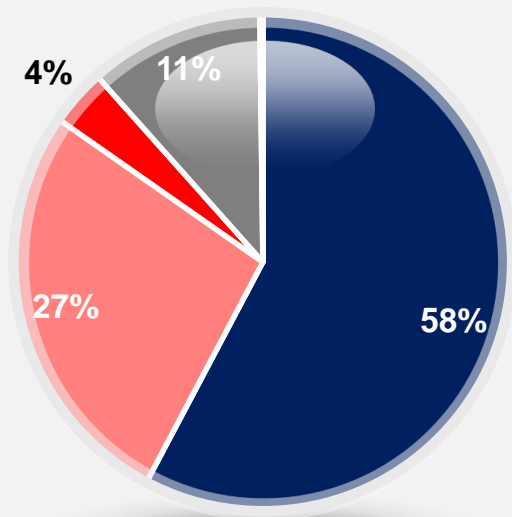


* Homemaker, Retired, Students, Unemployed

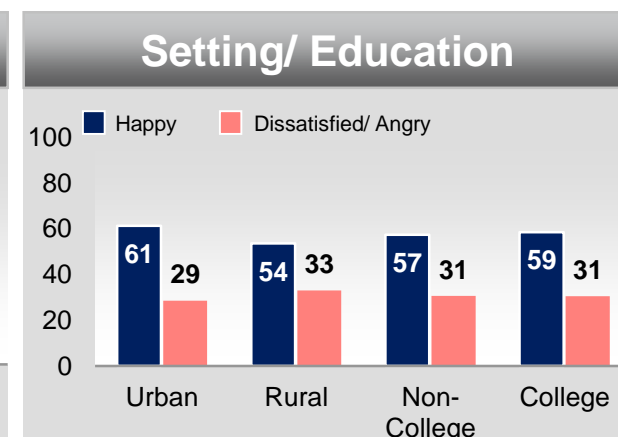
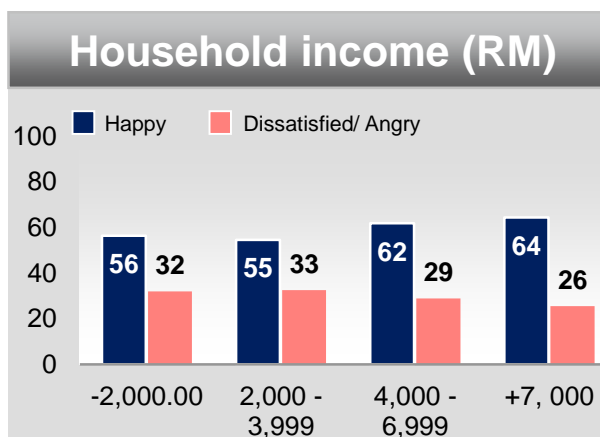
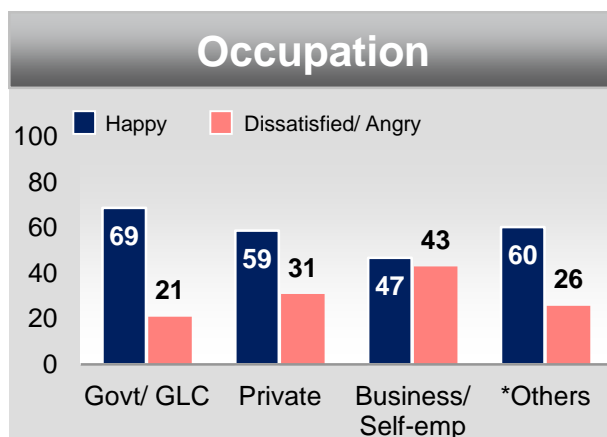
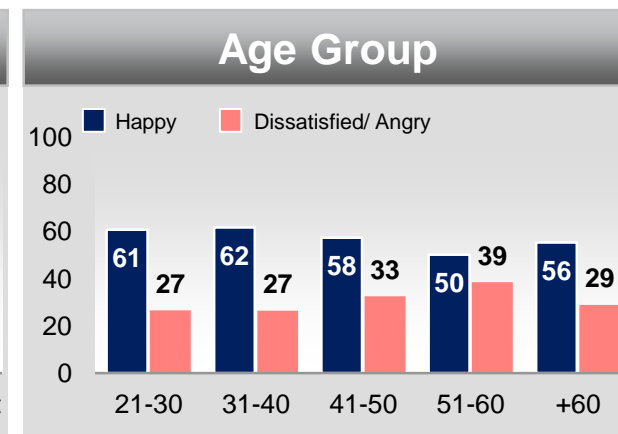
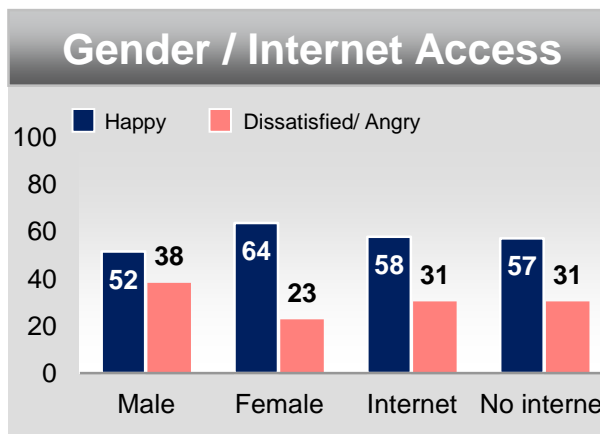
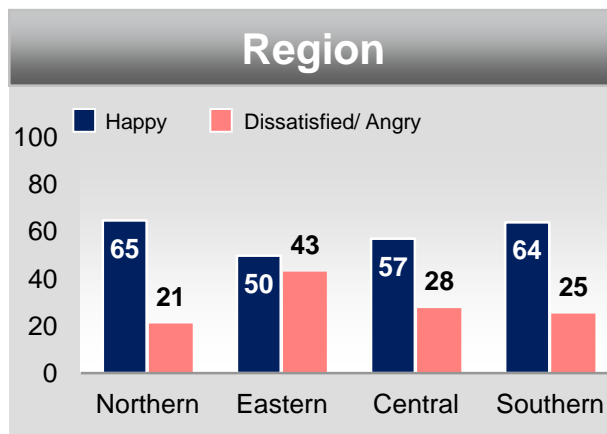
Q: Some people say they are happy with ..., while others are dissatisfied and others say they are angry? Which one best describes how you feel?

Perception towards Federal Govt

Among Malays



■ Happy ■ Dissatisfied ■ Angry
■ Unsure ■ Refuse

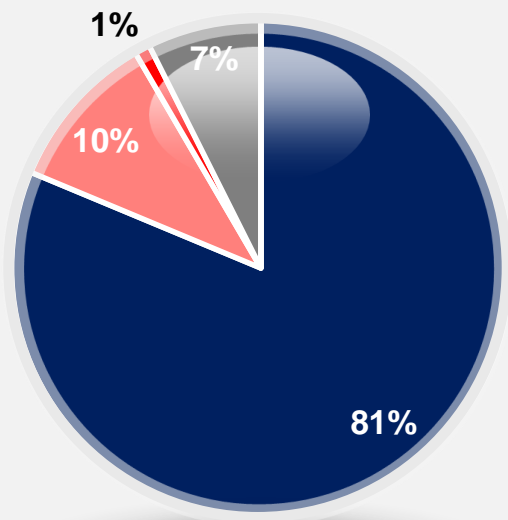


* Homemaker, Retired, Students, Unemployed

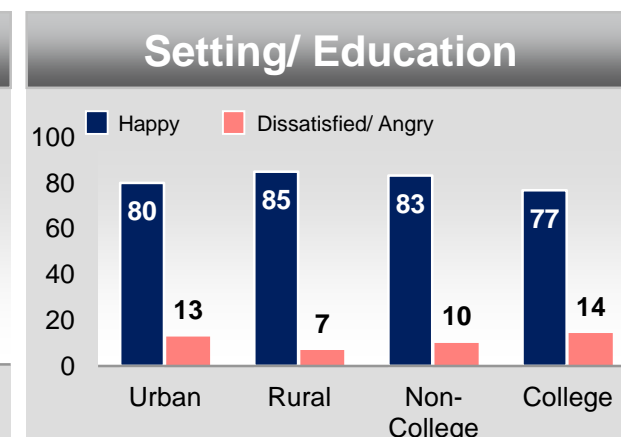
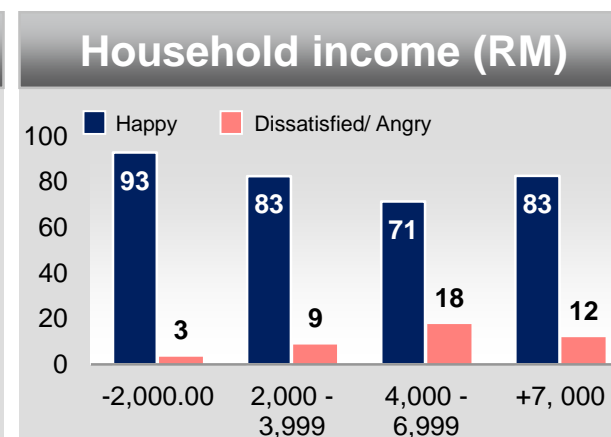
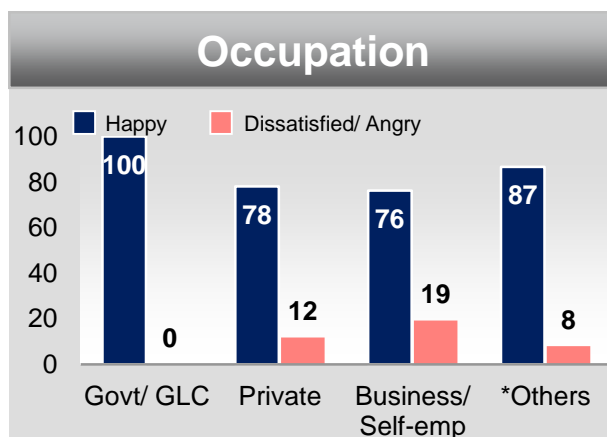
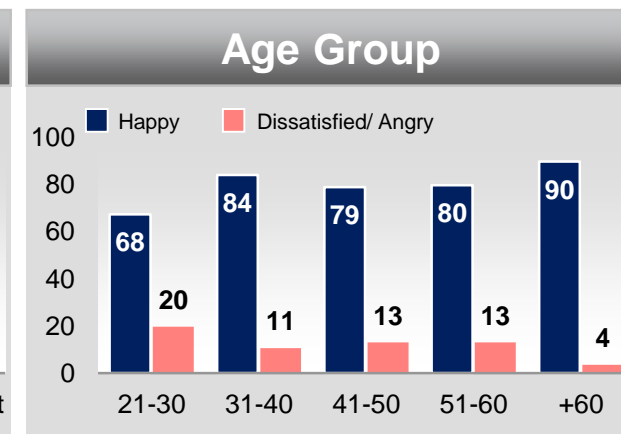
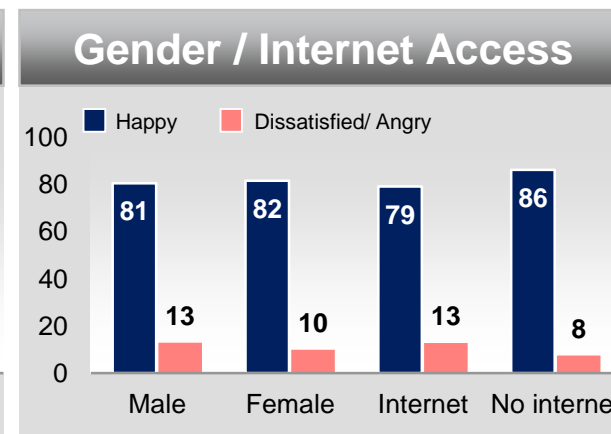
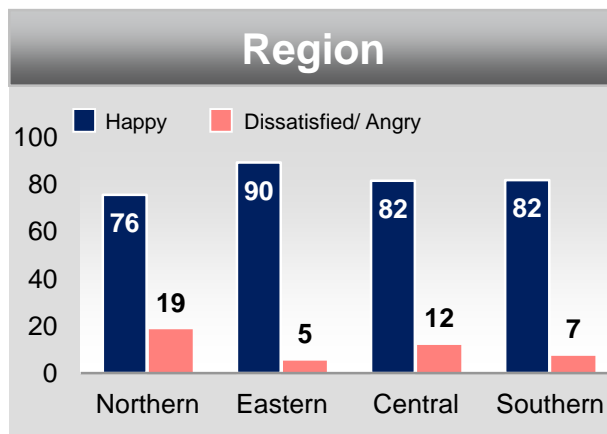
Q: Some people say they are happy with ..., while others are dissatisfied and others say they are angry? Which one best describes how you feel?

Perception towards Federal Govt

Among Non- Malays



■ Happy ■ Dissatisfied ■ Angry
■ Unsure ■ Refuse

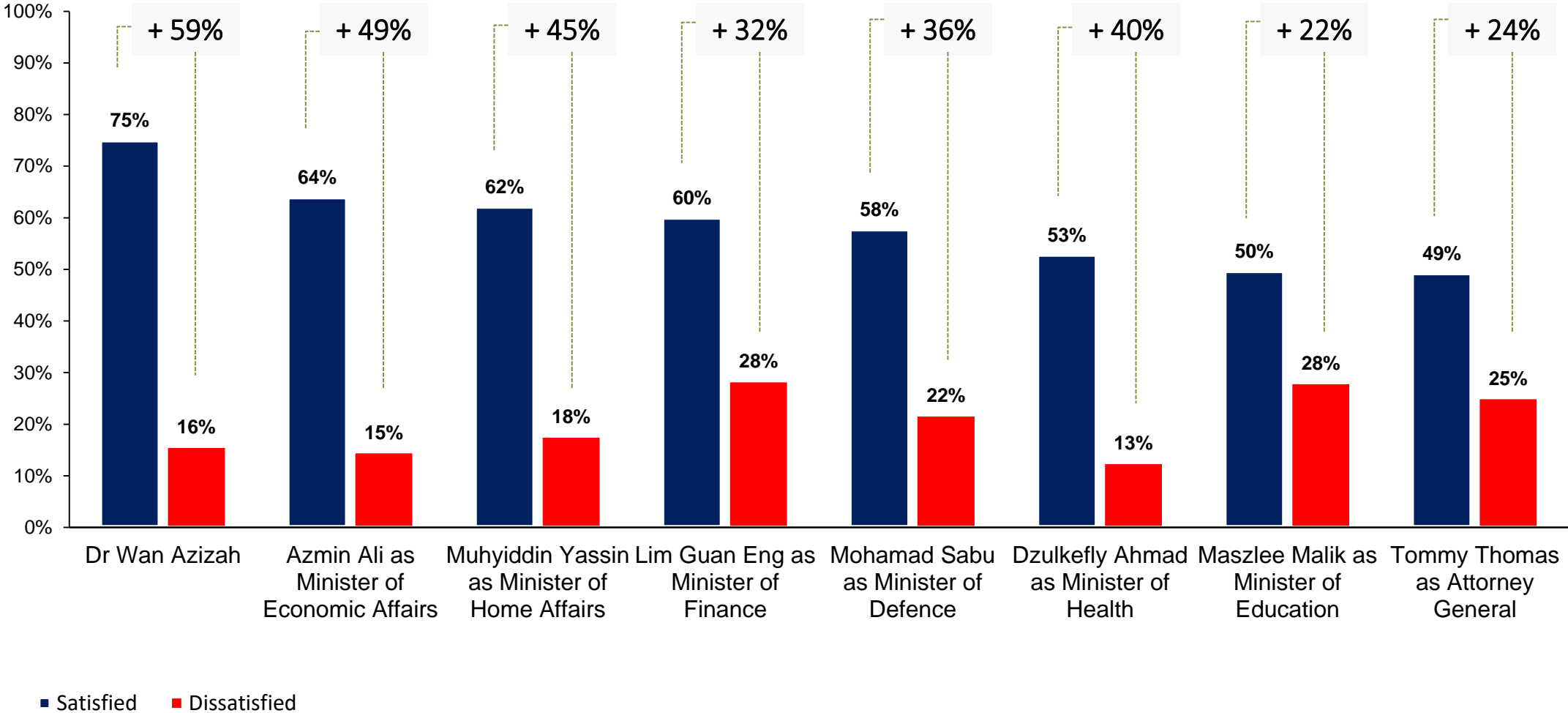


* Homemaker, Retired, Students, Unemployed

Q: Some people say they are happy with ..., while others are dissatisfied and others say they are angry? Which one best describes how you feel?

PERFORMANCE OF KEY MINISTERS

Performance of Key Ministers

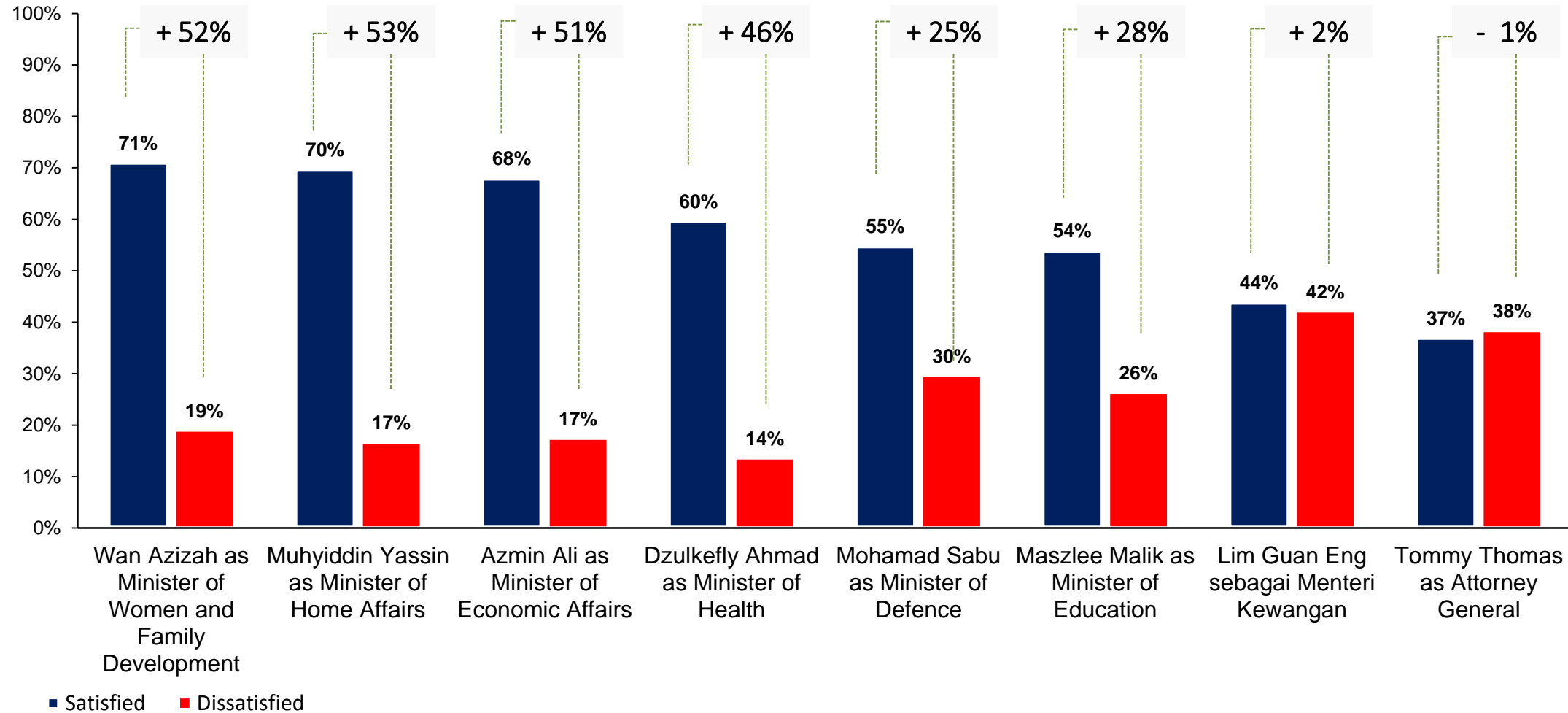


Q: How satisfied or dissatisfied are you with the performance of the following Minister... ?

*Note: Net (±) = Satisfied – Dissatisfied

Performance of Key Ministers

Among Malay respondents

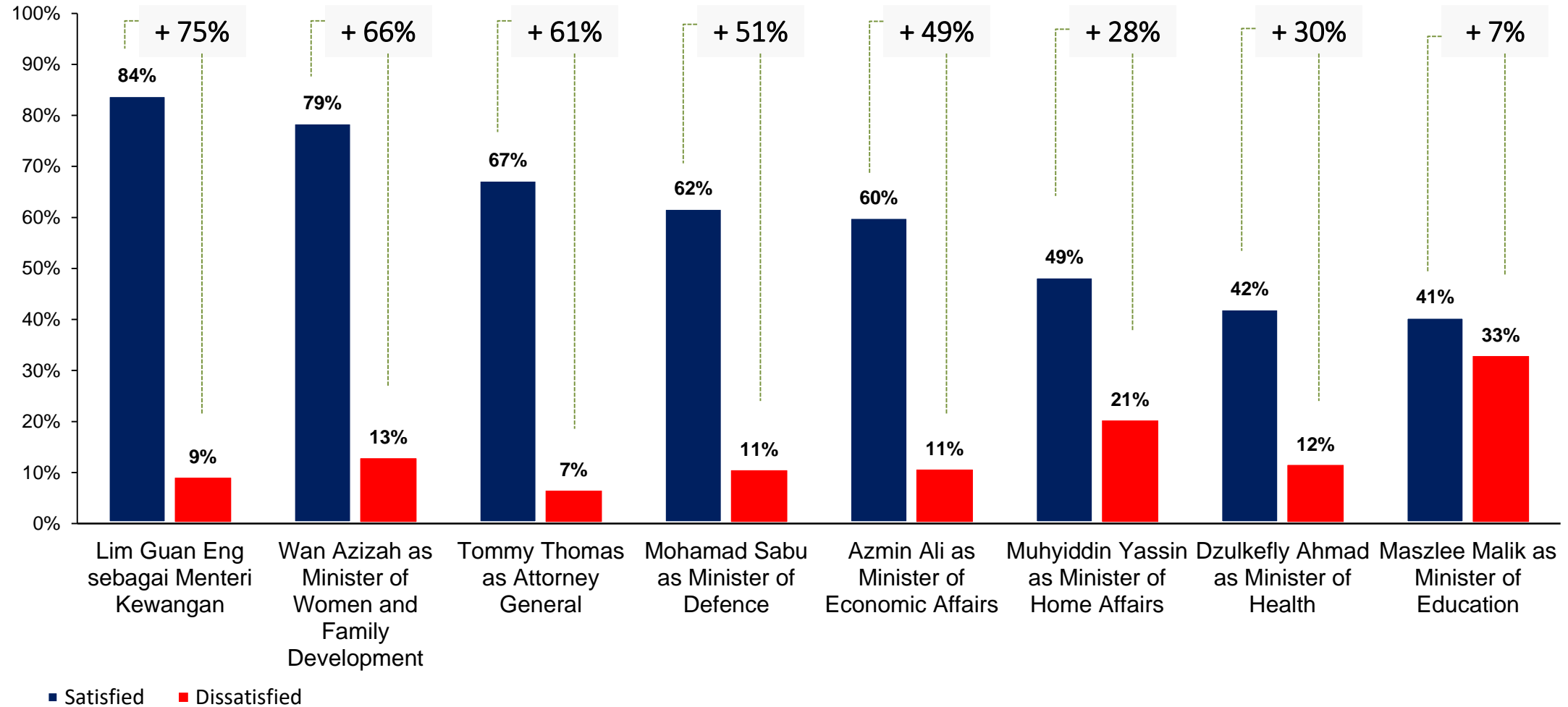


Q: How satisfied or dissatisfied are you with the performance of the following Minister... ?

*Note: Net (\pm) = Satisfied – Dissatisfied

Performance of Key Ministers

Among Non-Malay respondents

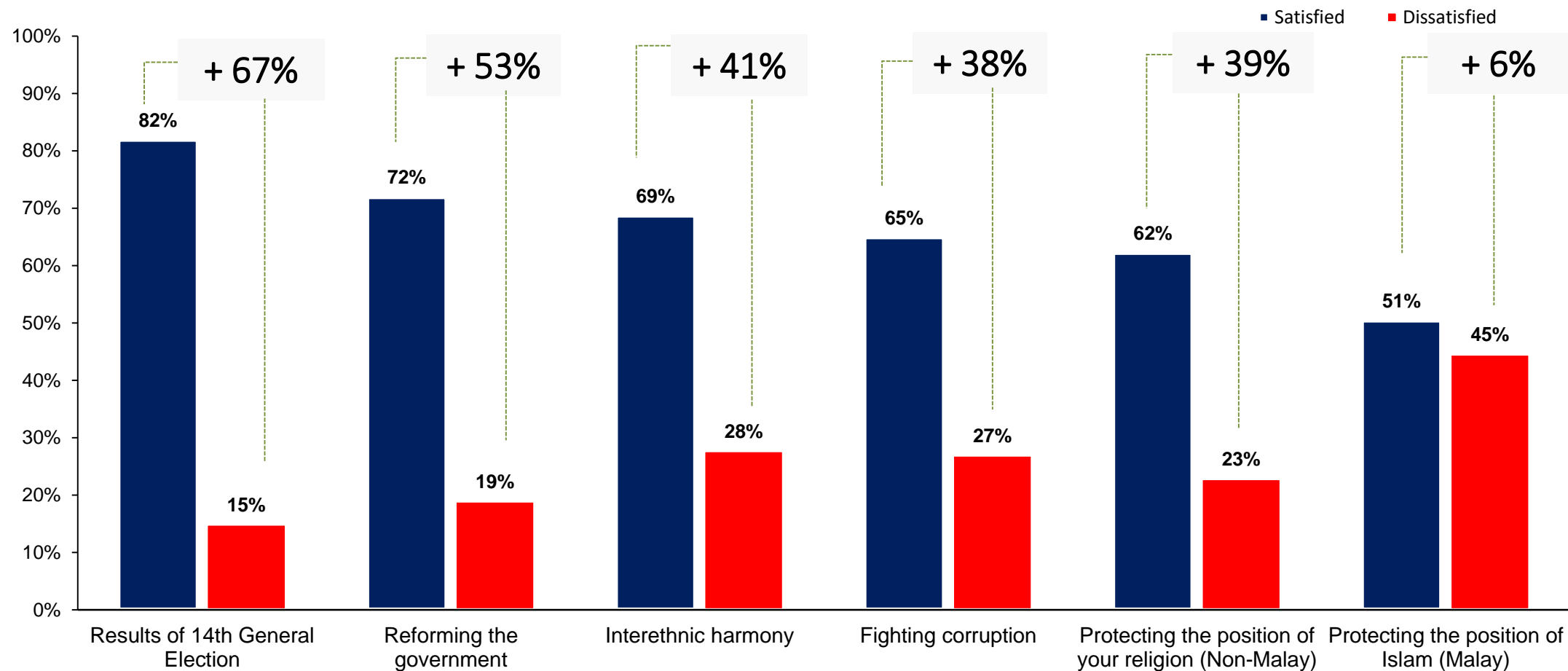


Q: How satisfied or dissatisfied are you with the performance of the following Minister... ?

*Note: Net (±) = Satisfied – Dissatisfied

ASPIRATIONS TOWARDS THE PH GOVERNMENT

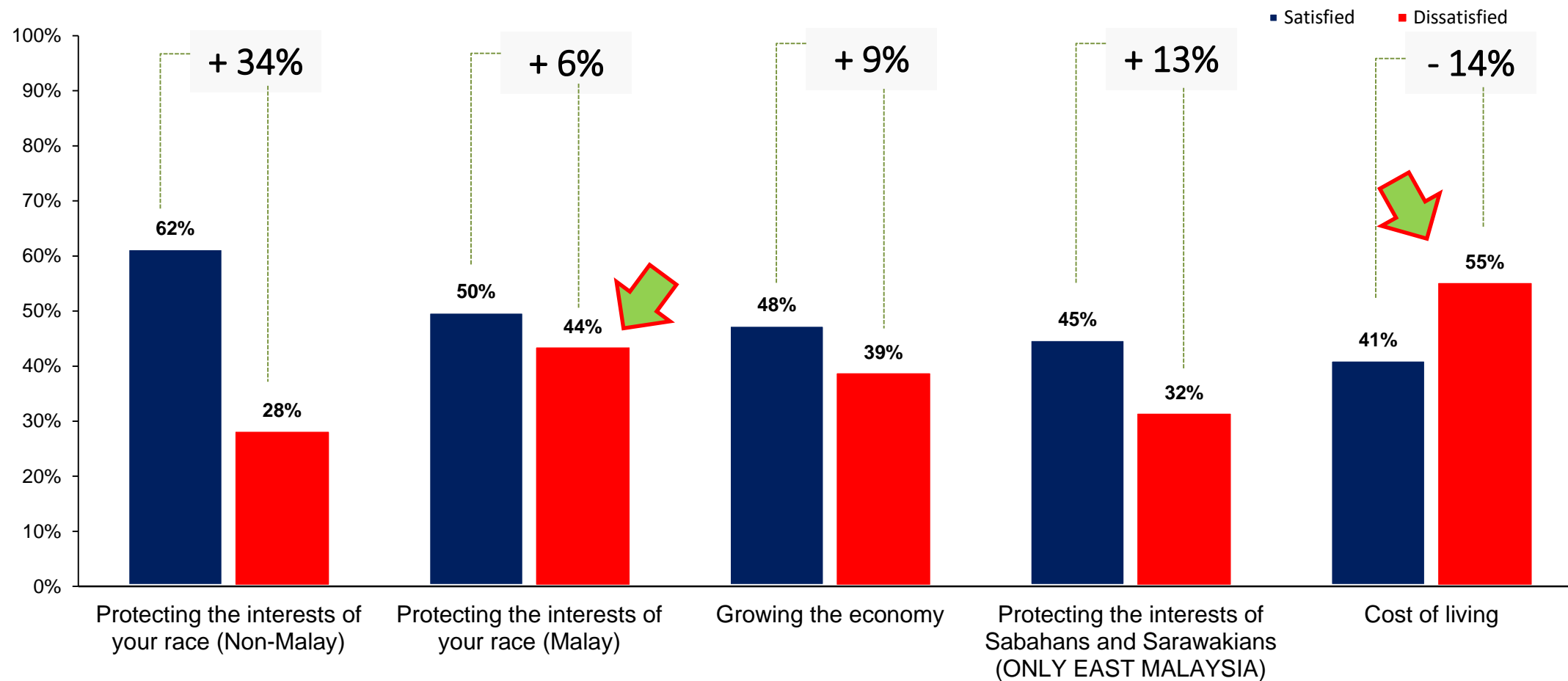
Satisfaction Towards The New Government



Q: How satisfied or dissatisfied are you with the... ?

*Note: Net (±) = Satisfied – Dissatisfied

Satisfaction Towards The New Government



The economy remains top concern

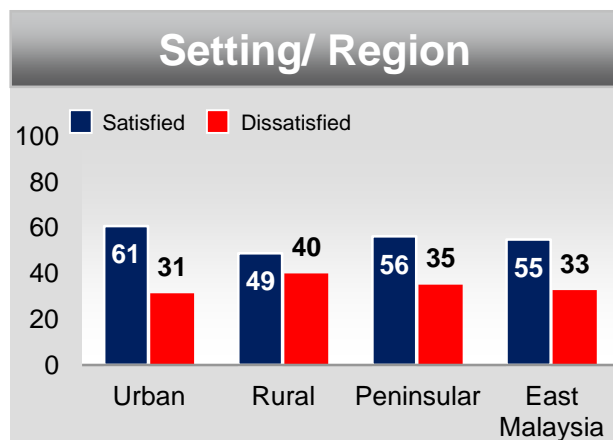
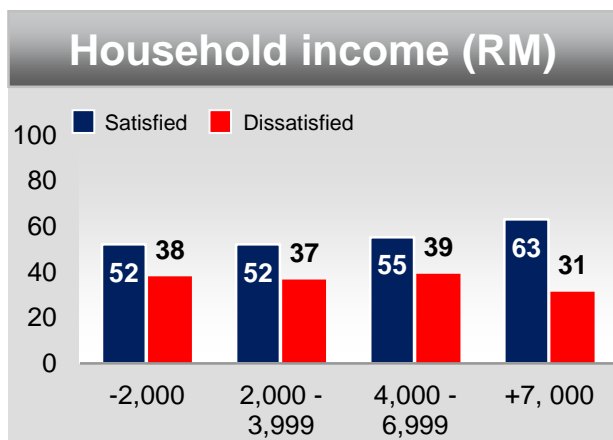
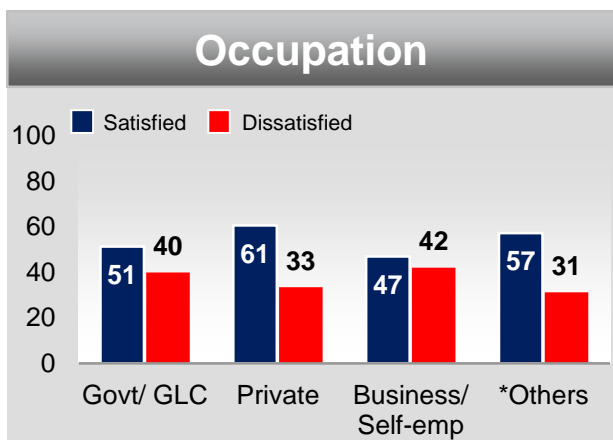
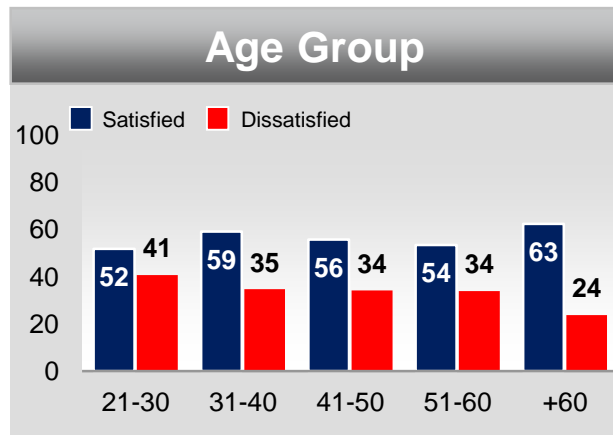
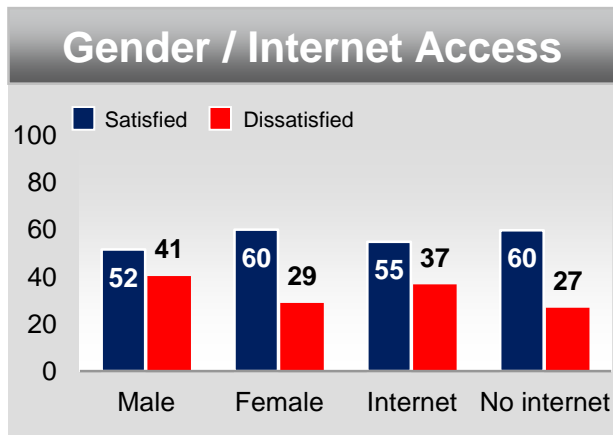
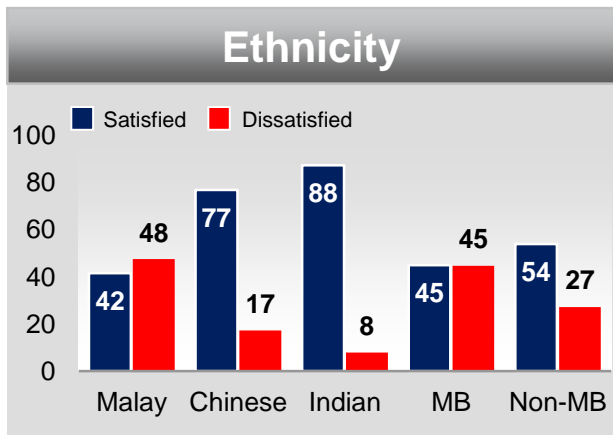
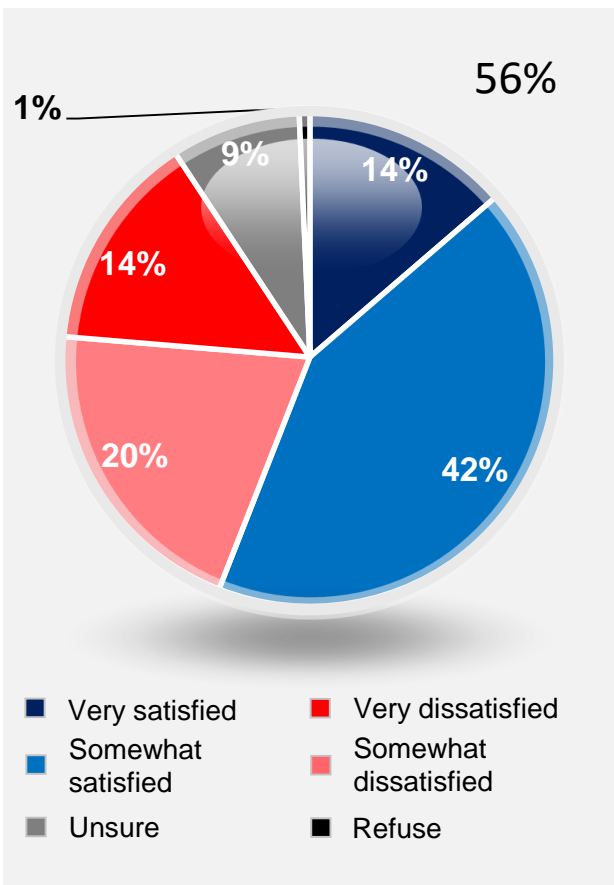
Issues related to race has some traction among Malay voters

Q: How satisfied or dissatisfied are you with the... ?

*Note: Net (±) = Satisfied – Dissatisfied

PH Election Promises

Despite being unable to fulfil some promises, majority of voters are satisfied with PH in their attempts



* Homemaker, Retired, Students, Unemployed

Q: How satisfied or dissatisfied are you with the overall performance of Pakatan Harapan federal government in fulfilling the election promises?