

The Essential Report

19 August 2013





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Date: 19 August 2013

Prepared by: Essential Research

Data supplied:



Essential Media Communications is a member of the Association of Market and Social Research Organisations.



Our researchers are members of the Australian Market and Social Research Society

About this poll

This report summarises the results of a weekly omnibus conducted by Essential Research with data provided by Your Source. The survey was conducted online from the 14th to 18th August and is based on 1,055 respondents.

Aside from the standard question on voting intention, this week's report includes questions on firmness of vote, attributes of political parties, trust in media coverage of the election campaign and shift in voting intention.

The methodology used to carry out this research is described in the appendix on page 11.

Note that due to rounding, not all tables necessarily total 100% and subtotals may also vary.

Federal politics – voting intention

Q. If a Federal Election was held today to which party will you probably give your first preference vote? If not sure, which party are you currently leaning toward?

Q. If don't know -Well which party are you currently leaning to?

Sample size = 1,902 respondents

| First preference/leaning to | Election 21 Aug 10 | 4 weeks ago 22/7/13 | 2 weeks ago 5/8/13 | Last week 13/8/13 | This week 19/8/13 |
|-----------------------------|--------------------------|---------------------------|--------------------------|-------------------------|-------------------------|
| Liberal | | 42% | 40% | 40% | 41% |
| National | | 3% | 3% | 3% | 3% |
| Total Lib/Nat | 43.6% | 45% | 43% | 43% | 44% |
| Labor | 38.0% | 39% | 38% | 39% | 40% |
| Greens | 11.8% | 7% | 9% | 8% | 8% |
| Other/Independent | 6.6% | 9% | 10% | 10% | 8% |

| 2 Party Preferred | Election 21 Aug 10 | 4 weeks ago 22/7/13 | 2 weeks ago 5/8/13 | Last week 13/8/13 | This week 19/8/13 |
|-------------------------|--------------------------|---------------------------|--------------------------|-------------------------|-------------------------|
| Liberal National | 49.9% | 51% | 51% | 51% | 50% |
| Labor | 50.1% | 49% | 49% | 49% | 50% |

NB. The data in the above tables comprise 2-week averages derived from the first preference/leaning to voting questions. Respondents who select 'don't know' are not included in the results. The two-party preferred estimate is calculated by distributing the votes of the other parties according to their preferences at the 2010 election.

Firmness of voting intention

Q. How likely is it that you will change your mind about who you vote for before the Federal election to be held this year?

| | Total Gave voting intention | Vote Labor | Vote Lib/Nat | Vote Greens | Other party/ Indepen dent | Total 5 Aug |
|---|--------------------------------------|---------------|-----------------|----------------|------------------------------------|----------------|
| I will definitely not change my mind | 46% | 45% | 56% | 27% | 16% | 44% |
| It is very unlikely I will change my mind | 32% | 33% | 28% | 37% | 38% | 30% |
| It is quite possible I will change my mind as the campaign develops | 17% | 16% | 11% | 24% | 44% | 21% |
| Don't know | 5% | 6% | 4% | 12% | 2% | 5% |

46% of those who gave their voting intention say they will definitely not change their mind before the election, 32% say it is very unlikely they will change their mind and 17% say it is quite possible they will change. This represents a firming of voting intention since this question was asked two weeks ago.

Those most likely to say it is possible they will change their mind were Greens voters (24%), other party and independent voters (44%) and aged 25-34 (25%).

Attributes of the Labor Party

Q. Here is a list of things both favourable and unfavourable that have been said about various political parties. Which statements do you feel fit the Labor Party?

| | 6 Jul 09 | 14 Mar 10 | 27 April 11 | 28 May 12 | 2 Apr 13 | Total 19 Aug | Change |
|--|----------|-----------|-------------|-----------|----------|--------------|--------|
| Divided | 30% | 36% | 66% | 73% | 82% | 66% | -16 |
| Will promise to do anything to win votes | 57% | 63% | 72% | 70% | 71% | 65% | -6 |
| Looks after the interests of working people | | | 39% | 47% | 42% | 53% | +11 |
| Out of touch with ordinary people | 44% | 48% | 61% | 58% | 63% | 51% | -12 |
| Understands the problems facing Australia | 62% | 54% | 40% | 46% | 39% | 50% | +11 |
| Have a vision for the future | | | 43% | 41% | 42% | 49% | +7 |
| Moderate | 65% | 63% | 51% | 50% | 47% | 48% | +1 |
| Have good policies | | | | | | 46% | na |
| Clear about what they stand for | | | 28% | 31% | 27% | 38% | +11 |
| Has a good team of leaders | 60% | 52% | 34% | 29% | 24% | 36% | +12 |
| Extreme | 25% | 26% | 38% | 31% | 38% | 34% | -4 |
| Too close to the big corporate and financial interests | | | 46% | 36% | 39% | 31% | -8 |
| Trustworthy | | | | | | 30% | na |
| Keeps its promises | 44% | 33% | 20% | 22% | 19% | 27% | +8 |

The Labor Party's main attributes were - divided (66%), will promise anything to win votes (65%), looks after the interests of working people (53%), out of touch with ordinary people (51%) and understands the problems facing Australia (50%).

Main changes since April were - divided (down 16% to 66%), has a good team of leaders (up 12% to 36%), out of touch with ordinary people (down 12% to 51%), looks after the interests of working people (up 11% to 53%), understands the problems facing Australia (up 11% to 50%) and clear about what they stand for (up 11% to 38%).

Attributes of the Liberal Party

Q. And which statements do you feel fit the Liberal Party?

| | 6 Jul 09 | 14 Mar 10 | 27 April 11 | 28 May 12 | 2 Apr 13 | Total 19 Aug | Change |
|--|----------|-----------|-------------|-----------|----------|--------------|--------|
| Will promise to do anything to win votes | 67% | 72% | 65% | 63% | 67% | 65% | -2 |
| Too close to the big corporate and financial interests | | | 60% | 58% | 59% | 60% | +1 |
| Out of touch with ordinary people | 62% | 58% | 54% | 53% | 54% | 58% | +4 |
| Have a vision for the future | | | 48% | 48% | 52% | 51% | -1 |
| Moderate | 50% | 50% | 55% | 52% | 52% | 48% | -4 |
| Understands the problems facing Australia | 44% | 43% | 51% | 52% | 50% | 48% | -2 |
| Clear about what they stand for | | | 44% | 46% | 48% | 45% | -3 |
| Extreme | 36% | 38% | 36% | 34% | 35% | 39% | +4 |
| Have good policies | | | | | | 38% | na |
| Has a good team of leaders | 29% | 31% | 40% | 39% | 41% | 36% | -5 |
| Looks after the interests of working people | | | 38% | 40% | 40% | 36% | -4 |
| Keeps its promises | 28% | 23% | 33% | 34% | 34% | 32% | -2 |
| Divided | 74% | 66% | 49% | 37% | 32% | 31% | -1 |
| Trustworthy | | | | | | 30% | na |

The Liberal Party's main attributes were - will promise anything to win votes (65%), too close to the big corporate and financial interest (60%), out of touch with ordinary people (58%) and have a vision for the future (51%).

The only substantial change since April was a drop in the figure for "has a good team of leaders" - down 5% to 36%.

Party Attributes Comparison – Labor vs Liberal

| | Labor | Liberal | Difference |
|--|-------|---------|------------|
| Divided | 66% | 31% | +35 |
| Looks after the interests of working people | 53% | 36% | +17 |
| Have good policies | 46% | 38% | +8 |
| Understands the problems facing Australia | 50% | 48% | +2 |
| Will promise to do anything to win votes | 65% | 65% | - |
| Moderate | 48% | 48% | - |
| Has a good team of leaders | 36% | 36% | - |
| Trustworthy | 30% | 30% | - |
| Have a vision for the future | 49% | 51% | -2 |
| Extreme | 34% | 39% | -5 |
| Keeps its promises | 27% | 32% | -5 |
| Out of touch with ordinary people | 51% | 58% | -7 |
| Clear about what they stand for | 38% | 45% | -7 |
| Too close to the big corporate and financial interests | 31% | 60% | -29 |

The Labor Party is viewed more favourably than the Liberal Party in terms of looking after the interest of working people, being too close to the big corporate and financial interests, having good policies and less out of touch with ordinary people.

The Liberal Party is seen more favourably in terms of being divided and clear about what they stand for.

Trust in media coverage of election campaign

Q. How much trust do you have in the way the following media have reported and commented on the election campaign so far?

| | Total a lot/some trust | A lot of trust | Some trust | Not much trust | No trust at all | Don't know | Don't use |
|-----------------------------|------------------------|----------------|------------|----------------|-----------------|------------|-----------|
| ABC TV | 58% | 22% | 36% | 10% | 7% | 8% | 17% |
| SBS TV | 52% | 16% | 36% | 9% | 5% | 10% | 24% |
| Commercial TV | 29% | 3% | 26% | 34% | 19% | 9% | 9% |
| ABC radio | 49% | 16% | 33% | 10% | 8% | 8% | 25% |
| Commercial radio | 25% | 4% | 21% | 27% | 19% | 10% | 18% |
| The Australian | 31% | 5% | 26% | 15% | 16% | 9% | 27% |
| The Telegraph (NSW) | 25% | 7% | 18% | 21% | 28% | 7% | 19% |
| Sydney Morning Herald (NSW) | 39% | 7% | 32% | 21% | 16% | 8% | 17% |
| The Age (Victoria) | 42% | 7% | 35% | 21% | 13% | 9% | 15% |
| Herald Sun (Victoria) | 30% | 5% | 25% | 25% | 26% | 8% | 12% |
| Courier Mail (Queensland) | 23% | 2% | 21% | 20% | 21% | 9% | 27% |

The most trusted media for coverage of the election campaign were ABC TV (58% trust), SBS TV (52%) and ABC radio (49%).

The most trusted newspapers were The Age (42%) and the Sydney Morning Herald (39%).

The least trusted media were the Courier Mail (23%), The Telegraph (25%) and commercial radio (25%).

Shifted voting position

Q. Since the election campaign began, have you shifted your position on voting in any of the following ways?

| | Total | Vote Labor | Vote Lib/Nat | Vote Greens |
|--|-------|------------|--------------|-------------|
| Yes, I have changed my mind about who I will vote for | 6% | 6% | 5% | 10% |
| Yes, I have become <u>more</u> certain about who I will vote for | 13% | 17% | 8% | 22% |
| Yes, I have become <u>less</u> certain about who I will vote for | 11% | 9% | 7% | 18% |
| No, I haven't changed my position at all about who I will vote for | 62% | 63% | 76% | 42% |
| Don't know | 8% | 5% | 3% | 8% |

62% of respondents said they had not changed their voting position since the election campaign began. 6% said they had changed their vote, 13% had become more certain about their vote and 11% less certain. 17% of Labor voters said they had become more certain while 76% of Liberal/National voters had not changed their position at all.

51% of respondents aged 18-34 had not changed their voting position compared to 65% of those aged 35-54 and 72% of those aged 55+.

Appendix: Methodology, margin of error and professional standards

The data gathered for this report is gathered from a weekly online omnibus conducted by Your Source. Essential Research has been utilizing the Your Source online panel to conduct research on a week-by-week basis since November 2007.

Each week, the team at Essential Media Communications discusses issues that are topical and a series of questions are devised to put to the Australian public. Some questions are repeated regularly (such as political preference and leadership approval), while others are unique to each week and reflect media and social issues that are present at the time.

Your Source has a self-managed consumer online panel of over 100,000 members. The majority of panel members have been recruited using off line methodologies, effectively ruling out concerns associated with online self-selection.

Your Source has validation methods in place that prevent panellist over use and ensure member authenticity. Your Source randomly selects 18+ males and females (with the aim of targeting 50/50 males/females) from its Australia wide panel. An invitation is sent out to approximately 7000 – 8000 of their panel members.

The response rate varies each week, but usually delivers 1000+ interviews. In theory, with a sample of this size, there is 95 per cent certainty that the results are within 3 percentage points of what they would be if the entire population had been polled. However, this assumes random sampling, which, because of non-response and less than 100% population coverage cannot be achieved in practice. Furthermore, there are other possible sources of error in all polls including question wording and question order, interviewer bias (for telephone and face-to-face polls), response errors and weighting. The best guide to a poll's accuracy is to look at the record of the polling company - how have they performed at previous elections or other occasions where their estimates can be compared with known population figures. In the last poll before the 2010 election, the Essential Report estimates of first preference votes were all within 1% of the election results.

The Your Source online omnibus is live from the Wednesday night of each week and closed on the following Sunday. Incentives are offered to participants in the form of points. Essential Research uses the Statistical Package for the Social Sciences (SPSS) software to analyse the data. The data is weighted against Australian Bureau of Statistics (ABS) data.

All Essential Research and senior Your Source staff hold Australian Market and Social Research Society (AMSRS) membership and are bound by professional codes of behaviour. Your Source is an Australian social and market research company specializing in recruitment, field research, data gathering and data analysis. Essential Research is a member of the Association Market and Social Research Organisations (AMSRO). Your Source holds Interviewer Quality Control Australia (IQCA) accreditation, Association Market and Social Research Organisations (AMSRO) membership and World Association of Opinion and Marketing Research Professionals (ESOMAR) membership. Both Essential Research and Your Source are ISO accredited market research companies. This research was conducted in compliance with AS: ISO20252 guidelines.