The Essential Report

2 February 2016

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Prepared by:	Essential Research
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the Association of Market and Social Research Organisations.

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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 27th to 28th January 2016 and is based on 1,021 respondents.

Aside from the standard question on voting intention, this week's report includes questions on Australia becoming a republic, trust in media and downloading from the internet.

The methodology used to carry out this research is described in the appendix on page 13.

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

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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 = 1,811 respondents

First preference/leaning to	Election 7 Sep 13	7 weeks ago 15/12/15	Last week 25/1/16	This week 2/2/16
Liberal		42%	40%	40%
National		3%	4%	4%
Total Liberal/National	**45.6%**	**45%**	**44%**	**44%**
Labor	**33.4%**	**35%**	**35%**	**35%**
Greens	8.6%	10%	10%	11%
Palmer United Party	5.5%	1%	1%	1%
Other/Independent	6.9%	9%	9%	9%

2 Party Preferred	Election 7 Sep 13	7 weeks ago 15/12/15	Last week 25/1/16	This week 2/2/16
Liberal National	**53.5%**	52%	52%	51%
Labor	**46.5%**	48%	48%	49%

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 2013 election.

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Republic

Q. Are you in favour or against Australia becoming a republic?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Jan 2010	March 2011	Jun 2012	Apr 2014	Oct 2014	Feb 2015	Sep 2015	Shift since Sep 2015
In favour	**36%**	44%	30%	53%	41%	41%	39%	39%	33%	31%	34%	39%	**-3**
Against	**31%**	24%	43%	11%	36%	32%	34%	35%	42%	31%	34%	29%	**+2**
No opinion	**33%**	33%	27%	36%	23%	27%	27%	27%	25%	38%	32%	32%	**+1**

36% (down 3% since September) of respondents were in favour of Australian becoming a republic and 31% (up 2%) were against. 33% could not give an opinion.

Greens (53%) and Labor (44%) voters were more likely to be in favour of a republic. 43% of Liberal/National voters were opposed.

Those more in favour were men (42%), higher income earners (42% of those earning $1,600+ pw) and university educated (45%).

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Support for republic at end of Queen's reign

Q. Would you support or oppose Australia becoming a republic at the end of the Queen's reign?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Aged 18-34	Aged 35-54	Aged 55+	Jan 2014
Total support	**45%**	**51%**	**41%**	**57%**	**44%**	**46%**	**41%**	**47%**	**47%**
Total oppose	**29%**	**21%**	**38%**	**18%**	**36%**	**22%**	**30%**	**35%**	**32%**
Strongly support	23%	29%	18%	32%	25%	19%	23%	27%	21%
Support	22%	22%	23%	25%	19%	27%	18%	20%	26%
Oppose	18%	14%	25%	14%	16%	14%	19%	21%	15%
Strongly oppose	11%	7%	13%	4%	20%	8%	11%	14%	17%
No opinion	27%	27%	21%	26%	21%	32%	29%	18%	20%

45% (down 2% since January 2014) support Australia becoming a republic at the end of the Queen's reign and 29% (down 3%) oppose. 27% (up 7%) have no opinion on the question.

Those most supportive of becoming a republic at the end of the Queen's reign were Labor voters (51%) Greens voters (57%), men (49%) and those with university education (54%).

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Will Australia ever become a Republic

Q. Do you think that Australia is likely or unlikely to ever become a republic?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Support republic	Oppose republic	Jun 2012	Apr 2014
Total likely	**56%**	**59%**	**60%**	**60%**	**60%**	**82%**	**43%**	**52%**	**46%**
Total unlikely	**24%**	**22%**	**28%**	**21%**	**26%**	**14%**	**41%**	**34%**	**37%**
Very likely	19%	21%	21%	21%	17%	41%	8%	12%	12%
Somewhat likely	37%	38%	39%	39%	43%	41%	35%	40%	34%
Somewhat unlikely	17%	15%	21%	15%	15%	11%	27%	25%	25%
Very unlikely	7%	7%	7%	6%	11%	3%	14%	9%	12%
Don't know	19%	18%	12%	17%	15%	4%	16%	15%	16%

56% (up 10% since April 2014) of Australians believe it is likely that Australia will one day become a republic. Just 24% (down 13%) think it is unlikely.

There was little difference in opinion across voter groups.

65% of males, compared to 49% of females believe it is likely that Australia will one day become a republic.

82% of those who support the republic and 43% of those opposed think it is likely.

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Support for changes

Q. Would you support or oppose any of the following?

	Total support	Total oppose	Strongly support	Support	Oppose	Strongly oppose	No opinion
Changing the Australian flag	**33%**	**55%**	13%	20%	22%	32%	13%
Changing the National Anthem	**28%**	**54%**	12%	16%	24%	30%	18%
Changing the date of Australia Day	**23%**	**59%**	11%	12%	24%	35%	17%

	Total support	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Aged 18-34	Aged 35-54	Aged 55+	Support republic
Changing the Australian flag	**33%**	34%	31%	56%	34%	33%	31%	34%	64%
Changing the National Anthem	**28%**	31%	27%	34%	23%	30%	25%	28%	44%
Changing the date of Australia Day	**23%**	23%	22%	48%	17%	35%	20%	16%	40%

A majority were opposed to changing the Australian flag, the National Anthem or the date of Australia Day.

33% supported changing the Australian flag, 28% supported changing the National Anthem and 23% supported changing Australia Day.

Greens voters were more strongly in favour of changing the flag (56%) and the date of Australia Day (48%). Younger respondents were a little more likely to support changing the date of Australia Day (35%).

A majority (64%) of those who favour a republic supported changing the National Flag but were split on changing the National Anthem and the date of Australia day.

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Trust in media

Q. How much trust do you have in what you read or hear in the following media?

	Total a lot /some trust	A lot of trust	Some trust	Not much trust	No trust at all	Don't know	Don't use	Total a lot /some Mar 10	Total a lot /some Jul 11	Total a lot /some Jun 12	Total a lot /some Jan 13	Total a lot /some Nov 14	Total a lot /some Jun 15
ABC TV news and current affairs	**66%**	21%	45%	14%	7%	3%	10%	70%	71%	74%	73%	69%	63%
SBS TV news and current affairs	**63%**	17%	46%	13%	7%	4%	14%					66%	61%
ABC radio news and current affairs	**62%**	18%	44%	14%	7%	4%	13%	62%	67%	69%	70%	62%	58%
News and opinion in local newspapers	**49%**	5%	44%	28%	10%	4%	9%	-	54%	56%	55%	53%	50%
News and opinion in daily newspapers	**49%**	5%	44%	27%	11%	4%	9%	62%	53%	52%	48%	50%	45%
ABC radio talkback programs	**49%**	10%	39%	21%	10%	4%	17%	45%	47%	50%	49%	48%	46%
Commercial TV news and current affairs	**48%**	6%	42%	29%	14%	4%	5%	64%	48%	46%	44%	48%	46%
Commercial radio news and current affairs	**46%**	4%	42%	26%	13%	4%	11%	54%	46%	45%	46%	45%	44%
News and opinion websites	**44%**	4%	40%	31%	11%	4%	10%	49%	41%	40%	40%	42%	39%
Commercial radio talkback programs	**34%**	4%	30%	31%	16%	4%	15%	38%	33%	33%	32%	33%	34%
Internet blogs	**23%**	3%	20%	35%	22%	4%	17%	20%	20%	20%	23%	22%	20%

Overall, trust in media has risen a little since this question was asked last year – however rankings remain much the same.

The most trusted media were ABC TV news and current affairs (66% a lot/some trust), SBS TV news and current affairs (63%) and ABC radio news and current affairs (62%).

The least trusted were internet blogs (23%) and commercial radio talkback programs (34%).

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Trust in newspapers

Q. How much trust do you have in what you read in the following newspapers?

	Total a lot/some	A lot of trust	Some trust	Not much trust	No trust at all	Don't know	Total a lot/some Jul 2011	Total a lot/some Jun 2012	Total a lot/some Jan 2013	Total a lot/some Jun 2015
The Australian	**63%**	12%	51%	23%	9%	5%	69%	60%	65%	58%
The Telegraph (NSW only)	**56%**	10%	46%	27%	14%	4%	52%	49%	48%	46%
Sydney Morning Herald (NSW only)	**66%**	11%	55%	22%	7%	4%	74%	69%	71%	70%
The Age (Victoria only)	**66%**	15%	51%	18%	11%	5%	79%	76%	71%	66%
Herald Sun (Victoria only)	**57%**	10%	47%	24%	15%	4%	54%	51%	50%	48%
Courier Mail (Queensland only)	**47%**	6%	41%	34%	16%	2%	65%	51%	57%	48%

** Note : Percentages based only on respondents who had read each newspaper.*

Overall, among those who have read them, the most trusted newspapers were the SMH (66% a lot/some trust), The Age (66%) and The Australian (63%). The Courier Mail (47%) was the least trusted.

Since this question was asked in 2015, there have been increases in trust for The Telegraph (up 10%), the HeraldSun (up 9%) and The Australian (up 5%).

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Downloading from the Internet

Q. Do you or does anyone in your household download films, music or television shows via the internet for free?

	Total	Men	Women	Aged 18-34	Aged 35-54	Aged 55+	May 2012	Oct 2013
Yes	26%	28%	25%	39%	26%	13%	32%	27%
No	64%	63%	64%	49%	65%	79%	61%	64%
Don't know	10%	9%	11%	12%	9%	8%	7%	9%

26% of respondents said they download films, music or television shows via the internet for free. This is much the same as recorded in 2013.

Those most likely to download were aged under 35 (39%).

Subscriptions to TV and content streaming

Q. Does your household subscribe to any of the following TV and content streaming services?

	Total	Men	Women	Aged 18-34	Aged 35-54	Aged 55+	Download from internet
Foxtel	30%	32%	28%	30%	33%	26%	32%
Netflix	25%	25%	25%	47%	19%	8%	36%
Stan	6%	7%	6%	12%	5%	1%	10%
Presto	7%	8%	6%	10%	8%	1%	13%
Other streaming service	8%	9%	8%	11%	10%	3%	21%
Total subscribe to TV or content services	51%	52%	51%	67%	51%	34%	66%

51% say they subscribe to TV and content streaming services. 30% subscribe to Foxtel and 25% subscribe to Netflix.

67% of those aged under 35 subscribe to TV and content streaming services including 47% who subscribe to Netflix.

Those who download films, music or television shows via the internet for free are more likely to also subscribe to TV and content streaming services (66%).

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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.

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