

# The Essential Report

11 July 2017



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**Prepared By:** Essential Research

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**Data Supplied by:**



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 6<sup>th</sup> to 10<sup>th</sup> July 2017 and is based on 1,020 respondents.

Aside from the standard question on voting intention, this week's report includes questions on party leaders, data storage, online crimes and dividedness on issues.

The methodology used to carry out this research is described in the appendix on page 12.

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



## Federal 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? If don't know - Well which party are you currently leaning to?

	Total	Last week 4/5/17	2 weeks ago 27/6/17	4 weeks ago 13/6/17	Election 2 Jul 16
Liberal	33%	35%	35%	35%	
National	3%	3%	4%	3%	
<b>Total Liberal/National</b>	<b>36%</b>	<b>38%</b>	<b>39%</b>	<b>38%</b>	<b>42.0%</b>
<b>Labor</b>	<b>36%</b>	<b>36%</b>	<b>36%</b>	<b>36%</b>	<b>34.7%</b>
Greens	11%	11%	10%	10%	10.2%
Nick Xenophon Team	3%	3%	3%	3%	
Pauline Hanson's One Nation	7%	7%	7%	8%	
Other/Independent	6%	5%	5%	5%	13.1%
<b>2 party preferred</b>					
Liberal National	<b>46%</b>	<b>47%</b>	<b>48%</b>	<b>48%</b>	<b>50.4%</b>
Labor	<b>54%</b>	<b>53%</b>	<b>52%</b>	<b>52%</b>	<b>49.6%</b>

NB. Sample = 1,826. 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 2016 election.

## Malcolm Turnbull

Q Do you approve or disapprove of the job Malcolm Turnbull is doing as Prime Minister?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote Other	June 2017	May 2017	Apr 2017	Mar 2017	Feb 2017	Jan 2017	June 2016	Dec 2015
<b>Total Approve</b>	<b>37%</b>	<b>20%</b>	<b>71%</b>	<b>18%</b>	<b>24%</b>	<b>36%</b>	<b>37%</b>	<b>35%</b>	<b>33%</b>	<b>34%</b>	<b>37%</b>	<b>38%</b>	<b>56%</b>
<b>Total Disapprove</b>	<b>49%</b>	<b>68%</b>	<b>20%</b>	<b>68%</b>	<b>59%</b>	<b>45%</b>	<b>48%</b>	<b>47%</b>	<b>50%</b>	<b>49%</b>	<b>48%</b>	<b>40%</b>	<b>23%</b>
Strongly approve	6%	2%	14%	1%	3%	5%	5%	5%	5%	5%	6%	6%	13%
Approve	31%	18%	57%	17%	21%	31%	32%	30%	28%	29%	31%	32%	43%
Disapprove	30%	39%	17%	43%	30%	28%	29%	29%	30%	28%	30%	24%	16%
Strongly disapprove	19%	29%	3%	25%	29%	17%	19%	18%	20%	21%	18%	16%	7%
Don't know	15%	12%	10%	13%	17%	19%	15%	17%	18%	16%	16%	21%	21%

37% approved of the job Malcolm Turnbull is doing as Prime Minister (up 1% from last month), and 49% disapproved (up 4% from last month).

71% of Liberal/National voters approved of the job Malcolm Turnbull is doing, compared to 20% of ALP voters and 18% of Greens voters.



## Bill Shorten

Q Do you approve or disapprove of the job Bill Shorten is doing as Opposition Leader?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	June 2017	May 2017	Apr 2017	Mar 2017	Feb 2017	Jan 2017	Dec 2015	Dec 2014
<b>Total Approve</b>	<b>36%</b>	<b>66%</b>	<b>23%</b>	<b>36%</b>	<b>19%</b>	<b>34%</b>	<b>34%</b>	<b>33%</b>	<b>30%</b>	<b>30%</b>	<b>37%</b>	<b>27%</b>	<b>35%</b>
<b>Total Disapprove</b>	<b>44%</b>	<b>19%</b>	<b>61%</b>	<b>51%</b>	<b>61%</b>	<b>43%</b>	<b>45%</b>	<b>46%</b>	<b>49%</b>	<b>47%</b>	<b>44%</b>	<b>47%</b>	<b>39%</b>
Strongly approve	6%	14%	3%	7%	2%	5%	6%	5%	4%	5%	7%	4%	7%
Approve	30%	52%	20%	29%	17%	29%	28%	28%	26%	25%	30%	23%	28%
Disapprove	24%	17%	25%	41%	28%	28%	26%	26%	26%	27%	25%	26%	23%
Strongly disapprove	20%	2%	36%	10%	33%	15%	19%	20%	23%	20%	19%	21%	16%
Don't know	20%	15%	17%	13%	20%	23%	22%	22%	22%	22%	20%	25%	26%

36% approved of the job Bill Shorten is doing as Prime Minister (up 2% from last month), and 44% disapproved (up 1%).

66% of ALP voters approved of the job Bill Shorten is doing, compared to 36% of Greens voters and 23% of Liberal/National voters.



## Preferred Prime Minister

Q Who do you think would make the better Prime Minister out of Malcolm Turnbull and Bill Shorten?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	June 2017	May 2017	Apr 2017	Mar 2017	Feb 2017	Jan 2017	Jun 2016	Dec 2015
Malcolm Turnbull	<b>41%</b>	15%	83%	18%	38%	39%	39%	39%	38%	39%	39%	40%	54%
Bill Shorten	<b>27%</b>	58%	5%	40%	12%	26%	31%	28%	26%	25%	28%	29%	15%
Don't know	<b>31%</b>	27%	12%	42%	50%	34%	30%	32%	36%	36%	33%	32%	31%

41% thought that Malcolm Turnbull would make a better Prime Minister (up 2% from last month), and 27% thought Bill Shorten would be better (up 1%). 31% did not know who would make a better Prime Minister (down 3%).

The results were split by party, with 83% of Liberal/National voters saying that Malcolm Turnbull would be a better Prime Minister, and 58% of ALP voters saying the Bill Shorten would.

Greens voters preferred Bill Shorten (40% preferred) to Turnbull (18%), although the largest proportion did not know who would make a better Prime Minister (42%).

## Trust in organisation to store data

Q Under national security laws, phone and internet records of all Australians are held for two years. How much trust do you have in the following organisations to store your personal data safely and in a way that would prevent abuse?

	Total lot/some trust	Total little/no trust	A lot of trust	Some trust	Little trust	No trust	Don't know	A lot/some trust (Oct 2015)	A lot/some trust (Nov 2014)
Security agencies such as the Australian Federal Police, local police and ASIO	64%	32%	21%	43%	20%	12%	5%	49%	53%
The Government	43%	52%	9%	34%	31%	21%	5%	40%	42%
Telecommunications companies and internet service providers	29%	67%	4%	25%	36%	31%	4%	31%	32%
Other private companies	24%	69%	2%	22%	35%	34%	7%	20%	20%

64% have a lot or some trust in security agencies to store personal data safely and in a way that would prevent abuse – a 15% increase from when this question was last asked in October 2015. For each other organisations, a majority had little or no trust.

Overall, trust has increased for most organisations since this question was asked in 2015, with the exception of telecommunication companies and ISPs, for whom trust fell 2% to 29%.

*Note: When these questions were asked in 2015 and 2014, they referred to ‘new national security laws’, rather than ‘national security laws’, and said that data “will be held for two years”, rather than “are held for two years”. This wording has been changed to reflect that the laws have now come into effect.*





## Cyber Crimes

Q Have you ever been the victim of any of the following crimes?

	Total	Men	Women	Aged 18-34	Aged 35-54	Aged 55+	Oct 2012
Had a computer virus that damaged your computer or data	<b>33%</b>	34%	31%	35%	37%	24%	29%
Had your credit card number stolen	<b>22%</b>	19%	24%	19%	26%	20%	16%
Been the victim of online fraud	<b>14%</b>	15%	12%	15%	13%	13%	10%
Cyber bullying	<b>10%</b>	8%	12%	20%	8%	2%	3%
Online stalking, invasion of privacy or high levels of harassment	<b>9%</b>	8%	11%	16%	8%	2%	4%
Had your identity stolen	<b>6%</b>	6%	6%	9%	5%	4%	1%
No, none of them	<b>50%</b>	51%	50%	47%	49%	56%	56%

33% say they have had a computer virus that caused damage to their computer or data, 22% have had their credit card number stolen, and 14% have been the victim of online fraud. The incidence of each type of crime has risen by at least 4% since this question was last asked in October 2012. The proportion who have not experienced any of these types of crime fell 6% to 50%.

Those aged under 35 are more likely than other age groups to have been a victim of each type of crime, other than credit card theft and a computer virus.

Women are more likely than men to have been a victim of credit card theft (24% to 19%), cyber bullying (12% to 8%) and online stalking (11% to 8%), while men were more likely than women to get a computer virus (34% to 31%) and fall victim to online fraud (15% to 12%).

## Disagreement among Australians

Q What level of disagreement do you think exists among Australians over the following issues?

	Total high	Total low	Very high disagreement	High disagreement	Moderate disagreement	Low disagreement	Very low disagreement	Don't know
Allowing foreign investors to buy Australian farming land	42%	23%	23%	19%	22%	14%	9%	12%
Whether increased Muslim immigration poses a threat to the safety and security of the community	39%	22%	15%	24%	28%	11%	11%	11%
Offshore detention of asylum seekers	37%	24%	12%	25%	28%	13%	11%	11%
The need to legislate for same sex marriage	31%	34%	14%	17%	27%	18%	16%	9%
Paying penalty rates for working on Sundays and public holidays	30%	32%	14%	16%	29%	17%	15%	10%
What constitutes 'fair pay'	29%	24%	9%	20%	32%	16%	8%	15%
Whether we should open new coal mines	28%	25%	10%	18%	33%	15%	10%	14%
The immediate impact of climate change	26%	27%	7%	19%	36%	18%	9%	11%
Whether Australia should be a republic	20%	37%	7%	13%	27%	21%	16%	15%
Significant public investment in higher education	16%	38%	4%	12%	29%	26%	12%	16%
The need for Australia to focus on building renewable energy	15%	44%	4%	11%	30%	25%	19%	11%
Formally recognizing Aboriginal people in our constitution	14%	45%	5%	9%	28%	22%	23%	12%



The issues with the highest level of perceived disagreement were “allowing foreign investors to buy Australian farming land” (42% high disagreement), “whether increased Muslim immigration poses a threat to the safety and security of the community” (39%), and “offshore detention of asylum seekers” (37%).

The issues with the lowest level of perceived disagreement were “formally recognising Aboriginal people in our constitution” (45% low disagreement), the need for Australia to focus on building renewable energy (44%), “significant public investment in higher education (38%) and “whether Australia should become a republic (37%).



## 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 panelist 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 2016 election, the Essential Report estimates of first preference votes averaged less than 1% difference from the election results and the two-party preferred difference was only 0.1%.

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.

