

# The Essential Report

17 July 2018



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**Prepared By:** Essential Research

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**Data Supplied by:**



**AMSRS** 

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 12<sup>th</sup> to 15<sup>th</sup> July 2018 and is based on 1,014 respondents.

Aside from the standard question on voting intention, this week's report includes questions on energy, levels of Government, plastic bags and early learning.

The methodology used to carry out this research is described in the appendix on page 14.

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	2 weeks ago 3/7/18	4 weeks ago 19/6/18	Election 2 Jul 16
Liberal	37%	36%	35%	
National	4%	4%	3%	
<b>Total Liberal/National</b>	<b>40%</b>	<b>40%</b>	<b>38%</b>	<b>42.0%</b>
<b>Labor</b>	<b>36%</b>	<b>37%</b>	<b>35%</b>	<b>34.7%</b>
Greens	10%	11%	11%	10.2%
Nick Xenophon Team	1%	1%	2%	
Pauline Hanson's One Nation	6%	6%	7%	
Other/Independent	6%	5%	7%	13.1%
<b>2 party preferred</b>				
Liberal National	<b>49%</b>	<b>48%</b>	<b>48%</b>	<b>50.4%</b>
Labor	<b>51%</b>	<b>52%</b>	<b>52%</b>	<b>49.6%</b>

NB. 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.

## Coal vs renewables

Q Which of the following statements is closest to your view?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Jul 2015	Apr 2018
Governments should prioritise support for the coal industry over the renewable energy industry	16%	13%	24%	8%	22%	6%	13%
Government should prioritise support for the renewable energy industry over the coal industry	38%	48%	28%	67%	34%	50%	37%
The Government should treat both industries equally	34%	30%	42%	16%	36%	28%	35%
Don't know	12%	9%	6%	9%	8%	15%	15%

38% (up 1% since April) of respondents agree more with the statement that the Government should prioritise support for the renewable energy industry over the coal industry and only 16% (up 3%) think they should prioritise coal over renewables. 34% (down 1%) think they should treat both industries equally.

Those most likely to think the Government should give priority to renewable energy were Greens voters (67%), Labor voters (48%) and respondents with university education (45%).



## Statements about energy

Q Do you agree or disagree with the following statements?

	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
The government should fund up to \$5bn to build new coal plants or extend the life of existing ones	40%	38%	14%	26%	20%	18%	23%
Coal fired power is cheaper than power generated by renewables	47%	24%	14%	33%	15%	9%	29%
The government should hold an inquiry into power prices and anti-competitive conduct by power companies	80%	9%	42%	38%	7%	2%	11%
Privately owned power companies should be returned to public ownership	63%	17%	30%	33%	14%	3%	21%
Burning of coal increases CO2 emissions which leads to climate change	61%	21%	26%	35%	13%	8%	18%
Further expanding coal mining and exports would undermine global efforts to address climate change	55%	24%	23%	32%	15%	9%	21%

A substantial majority agree that there should be an inquiry into power prices and energy companies (80% agree), power companies should be returned to public ownership (63%) and burning coal leads to climate change (61%).

Nearly half (47%) believed that coal-fired power is cheaper than renewables and respondents were split over whether the Government should fund coal plants.



## Statements about Federal Government

Q Thinking about the Federal Government, do you agree or disagree with the following statements?

	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
I find it easy to get the Federal government services I need	45%	35%	7%	38%	26%	9%	21%
I find it easy to access/receive funds from the Federal government	34%	39%	7%	27%	27%	12%	27%
I feel that my voice is heard by Federal government	23%	61%	4%	19%	37%	24%	16%
I feel my interests are served by Federal government	30%	55%	4%	26%	34%	21%	15%
I feel I receive value for money from the taxes I pay to Federal government	34%	51%	5%	29%	30%	21%	15%
The internet has made it easier to access Federal government services	65%	22%	11%	54%	15%	7%	13%
The size of Federal government workforce should be expanded to provide more services	46%	36%	12%	34%	25%	11%	19%
The size of Federal government workforce should be reduced to reduce taxes	44%	38%	11%	33%	28%	10%	18%

There was majority agreement that the internet has made it easier to access Federal government services (65%) and majority disagreement that my voice is heard by Federal government (61%), my interests are served by Federal government (55%) and I receive value for money from the taxes I pay to Federal government (51%).



## Statements about State Government

Q Thinking about your state Government, do you agree or disagree with the following statements?

	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
I find it easy to get the State government services I need	47%	32%	8%	39%	24%	8%	21%
I find it easy to access/receive funds from the State government	31%	37%	7%	24%	27%	10%	31%
I feel that my voice is heard by State government	30%	54%	5%	25%	36%	18%	16%
I feel my interests are served by State government	36%	50%	6%	30%	32%	18%	14%
I feel I receive value for money from the taxes and charges I pay to State government	34%	48%	5%	29%	30%	18%	18%
The internet has made it easier to access State government services	62%	22%	12%	50%	16%	6%	16%
The size of State government workforce should be expanded to provide more services	43%	39%	12%	31%	27%	12%	18%
The size of State government workforce should be reduced to reduce taxes and charges	44%	37%	12%	32%	27%	10%	19%

There was majority agreement that the internet has made it easier to access State government services (62%) and majority disagreement that my voice is heard by State government (54%) and my interests are served by State government (50%).





## Statements about local Council

Q Thinking about your local council, do you agree or disagree with the following statements?

	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
I find it easy to get the council services I need	<b>55%</b>	<b>28%</b>	8%	47%	20%	8%	16%
I find it easy to access/receive funds from the council	<b>27%</b>	<b>38%</b>	6%	21%	26%	12%	35%
I feel that my voice is heard by council	<b>36%</b>	<b>47%</b>	6%	30%	31%	16%	17%
I feel my interests are served by council	<b>42%</b>	<b>45%</b>	7%	35%	30%	15%	14%
I feel I receive value for money from the taxes/rates /charges I pay to council	<b>37%</b>	<b>48%</b>	6%	31%	29%	19%	15%
The internet has made it easier to access council services	<b>63%</b>	<b>24%</b>	14%	49%	16%	8%	14%
The size of council workforce should be expanded to provide more services	<b>40%</b>	<b>40%</b>	9%	31%	26%	14%	19%
The size of council workforce should be reduced to reduce rates and charges	<b>42%</b>	<b>38%</b>	13%	29%	28%	10%	20%

There was majority agreement that the internet has made it easier to access local council services (63%) and I find it easy to get the council services I need (55%).

## Comparison of levels of Government

Total agree	Federal Govt.	State Govt.	Local council
I find it easy to get the . . . services I need	45%	47%	55%
I find it easy to access/receive funds from the . . .	34%	31%	27%
I feel that my voice is heard by . . .	23%	30%	36%
I feel my interests are served by . . .	30%	36%	42%
I feel I receive value for money from the taxes/rates/charges I pay to . . .	34%	34%	37%
The internet has made it easier to access . . . services	65%	62%	63%
The size of . . . workforce should be expanded to provide more services	46%	43%	40%
The size of . . . workforce should be reduced to reduce taxes/rates/charges	44%	44%	42%

Local councils were rated most highly for finding services you need (55%), having your voice heard (36%) or serving your interests (42%).

The three levels of Government were similar on most other issues – although there was slightly more support for expanding the Federal Government workforce.

## Ban on plastic bags

Q Some supermarkets have stopped providing customers with free plastic bags. Do you agree or disagree with the following statements?

	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Banning plastic bags is a positive step to protect the environment	<b>76%</b>	<b>18%</b>	37%	39%	11%	7%	5%
Banning plastic bags is simply an attempt by supermarkets to reduce costs	<b>46%</b>	<b>46%</b>	16%	30%	30%	16%	8%
The plastic bag ban will change my behaviour as a consumer	<b>57%</b>	<b>36%</b>	19%	38%	26%	10%	6%
Banning plastic bags, along with self-save checkouts, just places more of the work onto the shopper	<b>57%</b>	<b>36%</b>	19%	38%	27%	9%	6%
I support banning plastic bags in supermarkets	<b>73%</b>	<b>20%</b>	39%	34%	11%	9%	7%

73% say they support banning plastic bags in supermarkets and 76% agree that it is a positive step to protect the environment. A majority (57%) believe the ban will change their behaviour.

However, a majority also agree that it places more of the work onto the shopper (57%) and they were split over whether it is simply an attempt by supermarkets to reduce costs (46% agree/46% disagree).

Grocery buyers held very similar views to the total population.



Grocery buyers	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Banning plastic bags is a positive step to protect the environment	<b>77%</b>	<b>18%</b>	38%	39%	10%	8%	5%
Banning plastic bags is simply an attempt by supermarkets to reduce costs	<b>44%</b>	<b>48%</b>	17%	27%	31%	17%	8%
The plastic bag ban will change my behaviour as a consumer	<b>59%</b>	<b>35%</b>	20%	39%	25%	10%	6%
Banning plastic bags, along with self-save checkouts, just places more of the work onto the shopper	<b>56%</b>	<b>36%</b>	22%	36%	27%	9%	5%
I support banning plastic bags in supermarkets	<b>74%</b>	<b>20%</b>	40%	34%	11%	9%	6%



## Childcare and early learning policies

Q Thinking about childcare and early learning, do you agree or disagree with the following policies?

	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Ensuring all children have access to two years of early learning (e.g. kindy or preschool program) before they started school	<b>77%</b>	<b>12%</b>	32%	45%	8%	4%	11%
Removing support for children whose parents are not in the workforce and are not actively looking for work	<b>42%</b>	<b>43%</b>	16%	26%	27%	16%	14%
Ensuring children from poor or disadvantaged children get the support they need to access two years of early learning (e.g. kindy or preschool program) before they start school.	<b>81%</b>	<b>9%</b>	37%	44%	6%	3%	9%

There was strong agreement with the policies that all children have access to two years of early learning (77% agree) and that children from poor or disadvantaged children get the support they need to access two years of early learning (81%).

However, respondents were split over removing support for children whose parents are not in the workforce and are not actively looking for work (42% agree/43% disagree).

Households with children were more likely to agree that all children have access to two years of early learning (85%) but were also evenly divided over removing support for children whose parents are not in the workforce and are not actively looking for work (45% agree/45% disagree). Those most likely to oppose removing support were women (49% disagree), Greens voters (58%) and aged 65+ (52%).



## Appendix: Methodology, margin of error and professional standards

The data gathered for this report is gathered from a fortnightly online omnibus conducted by Your Source. Essential Research has been utilizing the Your Source online panel to conduct opinion polling since November 2007.

Every two weeks, the team at Essential considers 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 current media and social issues.

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 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. 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.

