

# The Essential Report

31 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 26<sup>th</sup> to 29<sup>th</sup> July 2018 and is based on 1,022 respondents.

Aside from the standard question on voting intention, this week's report includes questions on voting behaviour, party leaders, party attributes and the internet.

The methodology used to carry out this research is described in the appendix on page 17.

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 17/7/18	4 weeks ago 3/7/18	Election 2 Jul 16
Liberal	36%	37%	36%	
National	4%	4%	4%	
<b>Total Liberal/National</b>	<b>41%</b>	<b>40%</b>	<b>40%</b>	<b>42.0%</b>
<b>Labor</b>	<b>36%</b>	<b>36%</b>	<b>37%</b>	<b>34.7%</b>
Greens	10%	10%	11%	10.2%
Nick Xenophon Team	1%	1%	1%	
Pauline Hanson's One Nation	6%	6%	6%	
Other/Independent	6%	6%	5%	13.1%
<b>2 party preferred</b>				
Liberal National	<b>49%</b>	<b>49%</b>	<b>48%</b>	<b>50.4%</b>
Labor	<b>51%</b>	<b>51%</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.

## Voting

Q When you vote in Federal and State elections, how important are the following in deciding who you vote for?

	Very important	Quite important	Not very important	Not at all important	Don't know	Very important -ant Vote Labor	Very important -ant Vote Lib/Nat	Very important -ant Vote Greens	Very important -ant Vote other
The parties' policies	55%	32%	7%	1%	5%	58%	53%	63%	63%
The party leaders	28%	45%	17%	4%	5%	26%	32%	23%	35%
The local candidates	27%	44%	18%	5%	6%	30%	26%	27%	29%

55% think that the parties' policies are very important in deciding who to vote for, while 28% think the party leaders are very important and 27% think the local candidate is very important.

Greens and other voters are more likely to think policies are very important while LNP and other voters were a little more likely to think the party leaders are very important.



## Statements about party leaders

Q Do you agree or disagree with the following statements?

	Total agree	Total disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Political parties should not change leaders before elections	64%	21%	21%	43%	17%	4%	14%
Political parties have every right to change leaders before elections	46%	42%	10%	36%	27%	15%	12%
Political parties should replace their leader if they are unpopular with voters	56%	29%	13%	43%	22%	7%	15%
If one of the major parties changed their leader I would be more likely to support them	24%	49%	5%	19%	35%	14%	27%
If one of the major parties changed their leaders I would be less likely to support them	30%	44%	6%	24%	33%	11%	26%
The leader of a party has little impact on my vote	41%	49%	9%	32%	34%	15%	9%

While 64% agreed that political parties should not change leaders before elections, 46% agreed they have the right to change leaders and 56% agreed that they should replace a leader who is unpopular.

Nearly half (49%) rejected the statement that the leader of the party has little impact on their vote, while 30% said changing leaders would make them less likely to vote for a party and 24% said it would make them more likely.

Labor voters were divided over voting for a party that changed leaders (28% more likely/30% less likely) while Liberal National voters were much less likely to support them (23% more likely/37% less likely).



## Best leader of the Liberal Party

Q Which of the following do you think would make the best leader of the Liberal Party?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Jun 2014	Aug 2015	Mar 2016	Nov 2016	Mar 2017	Aug 2017	Dec 2017	Apr 2018
Malcolm Turnbull	<b>28%</b>	22%	51%	13%	9%	31%	24%	39%	21%	20%	25%	21%	24%
Tony Abbott	<b>10%</b>	9%	11%	5%	18%	18%	18%	9%	11%	10%	10%	10%	11%
Julie Bishop	<b>16%</b>	16%	14%	29%	17%	4%	17%	12%	20%	17%	20%	19%	17%
Christopher Pyne	<b>2%</b>	2%	1%	4%	3%	<1%	1%	1%	2%	2%	3%	2%	2%
Scott Morrison	<b>2%</b>	3%	2%	-	2%	1%	3%	2%	3%	2%	2%	2%	2%
Peter Dutton	<b>5%</b>	2%	7%	-	10%					2%	3%	4%	3%
Someone else	<b>14%</b>	22%	3%	27%	24%	19%	13%	15%	18%	18%	13%	15%	14%
Don't know	<b>24%</b>	24%	11%	23%	16%	21%	22%	21%	25%	28%	25%	27%	27%

28% (up 4% since April) think Malcolm Turnbull would make the best leader of the Liberal Party, 16% prefer Julie Bishop (down 1%) and 10% prefer Tony Abbott (down 1%). 14% (no change) prefer someone else.

Among Liberal/National voters, 51% (up 6%) prefer Malcolm Turnbull, 14% (up 1%) Julie Bishop and 11% (down 6%) prefer Tony Abbott.

Preferences of men were Malcolm Turnbull 30% (+2%), Julie Bishop 13% (-3%) and Tony Abbott 13% (-).

Preferences of women were Malcolm Turnbull 26% (+5%), Julie Bishop 18% (+1%) and Tony Abbott 6% (-3%).



## Best leader of the Labor Party

Q Which of the following do you think would make the best leader of the Labor Party?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Aug 2015	Dec 2015	Mar 2016	Jul 2016	Nov 2016	Mar 2017	Aug 2017
Bill Shorten	19%	37%	12%	18%	7%	16%	13%	15%	27%	17%	21%	20%
Anthony Albanese	19%	17%	27%	14%	20%	12%	14%	14%	11%	12%	11%	13%
Tanya Plibersek	12%	13%	10%	28%	9%	13%	14%	14%	12%	14%	13%	13%
Chris Bowen	3%	3%	3%	3%	3%	5%	3%	7%	3%	4%	3%	4%
Tony Burke	2%	3%	2%	1%	4%	-	-	-	-	2%	2%	3%
Someone else	13%	5%	17%	12%	28%	18%	17%	18%	17%	18%	16%	13%
Don't know	31%	22%	29%	23%	27%	36%	38%	32%	30%	32%	35%	34%

19% (down 1% since August) think Bill Shorten would make the best leader of the Labor Party, 19% (up 6%) prefer Anthony Albanese and 12% (down 1%) Tanya Plibersek. 13% prefer someone else and 31% don't know.

Among Labor voters, 37% (up 3%) prefer Bill Shorten, 17% (up 2%) Anthony Albanese and 13% (down 2%) Tanya Plibersek.

Preferences of men were Bill Shorten 21% (-2%), Anthony Albanese 24% (+7%) and Tanya Plibersek 12% (+1%).

Preferences of women were Bill Shorten 17% (-), Anthony Albanese 14% (+4%) and Tanya Plibersek 12% (-2%).





## The Internet

Q Overall do you think the internet has been good or bad for the following:

	Total good	Total bad	Very good	Good	Neither good nor bad	Bad	Very bad	Don't know	Good Aged 18-34	Good Aged 35-54	Good Aged 55+
Jobs	64%	9%	20%	44%	22%	7%	2%	5%	72%	62%	59%
Education	69%	9%	25%	44%	18%	7%	2%	4%	74%	64%	71%
Health	52%	12%	13%	39%	31%	9%	3%	5%	55%	45%	57%
The media	44%	28%	14%	30%	25%	18%	10%	4%	53%	39%	44%
Entertainment	73%	7%	33%	40%	16%	5%	2%	3%	77%	70%	75%
Global relations	51%	11%	15%	36%	32%	8%	3%	7%	58%	48%	46%
Your life in general	65%	6%	20%	45%	26%	4%	2%	3%	67%	65%	64%
Society in general	49%	20%	11%	38%	28%	14%	6%	3%	50%	45%	54%

A substantial majority believe the internet has been good for entertainment (73%), education (69%) and jobs (64%).

65% think it has been good for their life in general and 49% for society in general.

The only issue in some dispute was whether the internet was good or bad for the media (44% good/28% bad).

Those aged under 35 were more likely to think the internet had been good for jobs, education and the media while those aged 55+ were more likely to think it had been good for health and society in general.



## Attributes of the Liberal 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 Liberal Party?

	Total	Change	Jul 2009	April 2011	Aug 2013	Nov 2015	Jun 2016	Nov 2017
Too close to the big corporate and financial interests	67%	+2		60%	60%	67%	66%	65%
Will promise to do anything to win votes	64%	-3	67%	65%	65%	68%	65%	67%
Out of touch with ordinary people	64%	-2	62%	54%	58%	62%	63%	66%
Divided	56%	-8	74%	49%	31%	56%	52%	68%
Moderate	56%	+3	50%	55%	48%	51%	47%	53%
Have a vision for the future	52%	+4		48%	51%	54%	51%	48%
Have good policies	46%	+1			38%	43%	41%	45%
Clear about what they stand for	45%	+5		44%	45%	46%	46%	40%
Has a good team of leaders	45%	+8	29%	40%	36%	48%	42%	37%
Understands the problems facing Australia	42%	+1	44%	51%	48%	46%	44%	41%
Looks after the interests of working people	37%	+1		38%	36%	32%	31%	36%
Extreme	34%	-3	36%	36%	39%	39%	38%	37%
Trustworthy	34%	-			30%	29%	30%	34%
Keeps its promises	33%	+1	28%	33%	32%	25%	30%	32%

The Liberal Party's main attributes were – too close to the big corporate and financial interest (67%), will promise anything to win votes (64%) and out of touch with ordinary people (64%).

Main changes since November last year, were – divided (down 8%), has a good team of leaders (up 8%) and clear about what they stand for (up 5%).



## Attributes of the Labor Party

Q And which statements do you feel fit the Labor Party?

	Total	Change	Jul 2009	April 2011	Aug 2013	Nov 2015	Jun 2016	Nov 2018
Will promise to do anything to win votes	68%	-1	57%	72%	65%	64%	64%	69%
Looks after the interests of working people	57%	-1		39%	53%	55%	56%	58%
Divided	56%	+5	30%	66%	66%	58%	49%	51%
Moderate	53%	+1	65%	51%	48%	56%	54%	52%
Have a vision for the future	50%	+1		43%	49%	42%	48%	49%
Understands the problems facing Australia	50%	+2	62%	40%	50%	48%	49%	48%
Out of touch with ordinary people	48%	-4	44%	61%	51%	52%	46%	52%
Clear about what they stand for	46%	+1		28%	38%	37%	43%	45%
Have good policies	45%	+1			46%	42%	46%	44%
Has a good team of leaders	38%	-1	60%	34%	36%	33%	39%	39%
Too close to the big corporate and financial interests	37%	-5		46%	31%	37%	35%	42%
Extreme	34%	-7	25%	38%	34%	30%	30%	41%
Keeps its promises	34%	+3	44%	20%	27%	29%	31%	31%
Trustworthy	33%	+1			30%	34%	33%	32%



The Labor Party's main attributes were - will promise anything to win votes (68%), looks after the interests of working people (57%), divided (56%) and moderate (53%).

Since this question was asked in November last year, the main changes have been for extreme (down 7%), divided (up 5%) and too close to the big corporate and financial interests (down 5%).



## Party Attributes Comparison – Labor vs Liberal

	Liberal	Labor	Difference
Too close to the big corporate and financial interests	67%	37%	<b>+30</b>
Out of touch with ordinary people	64%	48%	<b>+16</b>
Has a good team of leaders	45%	38%	<b>+7</b>
Moderate	56%	53%	<b>+3</b>
Have a vision for the future	52%	50%	<b>+2</b>
Have good policies	46%	45%	<b>+1</b>
Trustworthy	34%	33%	<b>+1</b>
Divided	56%	56%	-
Extreme	34%	34%	-
Clear about what they stand for	45%	46%	<b>-1</b>
Keeps its promises	33%	34%	<b>-1</b>
Will promise to do anything to win votes	64%	68%	<b>-4</b>
Understands the problems facing Australia	42%	50%	<b>-8</b>
Looks after the interests of working people	37%	57%	<b>-20</b>



The Labor Party is viewed more favourably in terms of looking after the interests of working people (-20) and not being too close to the big corporate and financial interests (+30) or out of touch with ordinary people (+16).

The Labor Party is also more likely to understand the problems facing Australia (-8) and the Liberal Party more likely to have a good team of leaders (+7).



## 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.

