

The Essential Report

19 July 2016

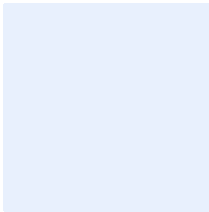


The Essential Report

Date: 19/7/2016

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 13th to 17th July 2016 and is based on 1,012 respondents.

Aside from the standard question on voting intention, this week's report includes questions on the economy, party leaders, greyhound racing and Senate voting.

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.

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 12/7/16	2 weeks ago 5/7/16	4 weeks ago 21/6/16	Election 7 Sep 13
Liberal	35%	37%	38%	37%	
National	4%	4%	3%	3%	
Total Liberal/National	39%	41%	41%	40%	45.6%
Labor	36%	36%	37%	37%	33.4%
Greens	10%	10%	10%	10%	8.6%
Nick Xenophon Team	4%	3%	2%	4%	-
Other/Independent	10%	10%	10%	9%	12.4%
2 party preferred					
Liberal National	49%	49%	50%	49%	53.5%
Labor	51%	51%	50%	51%	46.5%

NB. Sample = 1,833. 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.

State of the economy

Q Overall, how would you describe the current state of the Australian economy?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	May 2012	Apr 2013	Apr 2014	Mar 2015	Jan 2016	Apr 2016
Total good	30%	26%	44%	26%	14%	35%	45%	38%	27%	28%	32%
Total poor	26%	30%	18%	20%	41%	29%	26%	24%	33%	31%	27%
Very good	4%	4%	4%	5%	1%	6%	8%	3%	3%	4%	3%
Good	26%	22%	40%	21%	13%	29%	37%	35%	24%	24%	29%
Neither good nor poor	41%	42%	36%	48%	43%	33%	28%	34%	36%	36%	37%
Poor	20%	23%	16%	16%	29%	20%	17%	19%	24%	24%	21%
Very poor	6%	7%	2%	4%	12%	9%	9%	5%	9%	7%	6%
Don't know	4%	2%	2%	5%	2%	2%	2%	4%	4%	4%	3%

30% described the economy as good or very good and 26% poor/very poor - 41% said it was neither. This represents little change since April.

Liberal National voters were substantially more optimistic than other voters. Among Labor voters 26% (up 3%) thought it was good and 30% (down 1%) poor; for Liberal/National voters 44% (down 5%) said it was good and 18% (down 1%) poor.

Economy heading in right or wrong direction

Q From what you have read and heard, do you think the Australian economy is heading in the right direction or the wrong direction?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	May 2010	May 2011	Jun 2012	Apr 2013	Apr 2014	May 2015	Jan 2016	Apr 2016
The right direction	33%	22%	59%	18%	21%	51%	45%	43%	36%	39%	35%	30%	32%
The wrong direction	35%	47%	20%	44%	46%	25%	29%	32%	39%	34%	40%	38%	37%
Don't know	31%	31%	21%	38%	33%	24%	25%	25%	25%	26%	25%	31%	31%

33% of respondents think that Australia's economy is heading in the right direction and 35% think it is heading in the wrong direction. This represents little change since April.

22% (no change) of Labor voters, 59% (up 3%) of Liberal/National voters and 18% (up 5%) of Greens voters think the economy is heading in the right direction. 47% (up 1%) of Labor voters, 20% (no change) of Liberal/National voters and 44% (down 13%) of Greens voters think it is heading in the wrong direction.



Economic Conditions in Australia

Q Over the next 12 months do you think economic conditions in Australia will get better, get worse or stay much the same?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Dec 2008	Oct 2009	Oct 2010	Oct 2011	Aug 2012	Sep 2013	Sep 2015
Get Better	27%	21%	41%	18%	15%	21%	66%	40%	16%	22%	38%	16%
Get Worse	41%	50%	26%	48%	55%	61%	15%	30%	58%	45%	33%	59%
Get a lot better	4%	2%	7%	-	1%	2%	8%	6%	2%	3%	7%	3%
Get a little better	23%	19%	34%	18%	14%	19%	58%	34%	14%	19%	31%	13%
Get a little worse	30%	34%	25%	38%	33%	45%	11%	20%	41%	30%	23%	39%
Get a lot worse	11%	16%	1%	10%	22%	16%	4%	10%	17%	15%	10%	20%
Stay much the same	25%	25%	27%	27%	24%	13%	15%	24%	22%	27%	19%	18%
No opinion	7%	3%	5%	7%	6%	5%	4%	6%	4%	6%	10%	7%

27% of Australians believe that over the next 12 months, economic conditions in Australia will get better and 41% believe they will get worse.

Labor (50%) and Greens (48%) voters were more likely than Coalition voters (26%) to think that economic conditions in Australia would get worse over the next 12 months.

Since the last time this question was asked in September 2015, the percentage of Australians who believe economic conditions will get better has risen from 16% to 27%.

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	Feb 2015	Aug 2015	Sep 2015	Dec 2015	Mar 2016
Malcolm Turnbull	30%	23%	50%	17%	17%	31%	24%	24%	37%	42%	39%
Tony Abbott	9%	6%	13%	4%	11%	18%	11%	18%	9%	9%	9%
Julie Bishop	16%	16%	17%	20%	18%	4%	21%	17%	14%	13%	12%
Christopher Pyne	3%	3%	1%	1%	8%	<1%	<1%	1%	1%	2%	1%
Scott Morrison	3%	2%	5%	2%	5%	1%	2%	3%	4%	2%	2%
Someone else	19%	27%	5%	25%	27%	19%	13%	13%	10%	9%	15%
Don't know	21%	22%	10%	31%	15%	21%	24%	22%	21%	22%	21%

30% (down 9% since March) think Malcolm Turnbull would make the best leader of the Liberal Party, 16% prefer Julie Bishop (up 4%) and 9% prefer Tony Abbott (no change). 19% (up 4%) prefer someone else.

Among Liberal/National voters, 50% (down 3%) prefer Malcolm Turnbull, 13% (down 4%) prefer Tony Abbott and 17% (up 6%) Julie Bishop.

Preferences of men were Malcolm Turnbull 31% (-12%), Tony Abbott 9% (-3%) and Julie Bishop 17% (+9%).

Preferences of women were Malcolm Turnbull 28% (-7%), Julie Bishop 15% (-2%) and Tony Abbott 8% (+2%).

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
Bill Shorten	27%	51%	16%	19%	15%	16%	13%	15%
Anthony Albanese	11%	11%	13%	10%	14%	12%	14%	14%
Tanya Plibersek	12%	12%	12%	23%	15%	13%	14%	14%
Chris Bowen	3%	2%	4%	3%	5%	5%	3%	7%
Someone else	17%	6%	22%	12%	29%	18%	17%	18%
Don't know	30%	17%	34%	33%	22%	36%	38%	32%

27% (up 12% since March) think Bill Shorten would make the best leader of the Labor Party, 12% (down 2%) prefer Tanya Plibersek and 11% (down 3%) Anthony Albanese. 17% prefer someone else and 30% don't know.

Among Labor voters, 51% (up 24%) prefer Bill Shorten, 12% (-3%) Tanya Plibersek and 11% (-6%) Anthony Albanese.

Preferences of men were Bill Shorten 29% (+11%), Tanya Plibersek 14% (+4%) and Anthony Albanese 13% (-4%).

Preferences of women were Bill Shorten 25% (+13%), Tanya Plibersek 11% (-7%) and Anthony Albanese 9% (-2%).

Greyhound racing

Q Would you support or oppose a national ban on greyhound racing?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	NSW	Vic	Mar 2015
Total support	55%	57%	51%	71%	52%	55%	54%	48%
Total oppose	27%	28%	30%	18%	33%	27%	29%	26%
Strongly support	28%	33%	20%	44%	26%	27%	29%	23%
Support	27%	24%	31%	27%	26%	28%	25%	25%
Oppose	19%	18%	23%	12%	23%	17%	23%	19%
Strongly oppose	8%	10%	7%	6%	10%	10%	6%	7%
Don't know	19%	16%	19%	11%	15%	18%	18%	26%

55% would support a national ban on greyhound racing and 27% would oppose. 19% did not have an opinion. This represents an increase in support for a national ban on greyhound racing since this question was asked in March last year.

Those most likely to support a ban were Greens voters (71%), income over \$2,000 pw (62%) and those with a university education (62%). Views of those from NSW and Victoria were similar to the national sample.

Senate voting

Q Do you think the changes made to Senate voting prior to the election made voting for the Senate in this election easier or more difficult?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other
Total easier	19%	20%	18%	22%	23%
Total more difficult	37%	39%	43%	33%	29%
Much easier	5%	5%	4%	5%	6%
Easier	14%	15%	14%	17%	17%
More difficult	24%	25%	28%	21%	20%
Much more difficult	13%	14%	15%	12%	9%
Made no difference	25%	25%	27%	20%	32%
Not sure	16%	14%	11%	22%	16%
Didn't vote	4%	2%	1%	3%	1%

19% thought that the changes to Senate voting made voting easier and 37% thought it made voting more difficult.

Those most likely to think it made voting more difficult were aged 65+ (50%), aged 55-64 (43%) and those who had not completed year 12 (43%).



Senate outcome

Q Do you think the changes made to Senate voting prior to the election have produced a more democratic outcome in the Senate?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other
More democratic	20%	21%	22%	20%	26%
Less democratic	15%	20%	14%	15%	11%
Made no difference	39%	34%	45%	28%	46%
Don't know	26%	24%	19%	37%	17%

20% thought that the changes to Senate voting had produced a more democratic outcome and 15% thought they produced a less democratic outcome. 39% thought they made no difference and 26% did not know.

There were no significant differences across demographic or voter groups.

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 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.

