

# The Essential Report

30 January 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>5h</sup> to 28<sup>th</sup> January 2018 and is based on 1,028 respondents.

Aside from the standard question on voting intention, this week's report includes questions on party trust to handle issues, Australian society, economic issues, health insurance and interest in watching sport.

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 16/1/18	Election 2 Jul 16
Liberal	32%	34%	
National	3%	3%	
<b>Total Liberal/National</b>	<b>35%</b>	<b>37%</b>	<b>42.0%</b>
<b>Labor</b>	<b>36%</b>	<b>38%</b>	<b>34.7%</b>
Greens	10%	9%	10.2%
Nick Xenophon Team	3%	3%	
Pauline Hanson's One Nation	8%	6%	
Other/Independent	8%	7%	13.1%
<b>2 party preferred</b>			
Liberal National	<b>46%</b>	<b>47%</b>	<b>50.4%</b>
Labor	<b>54%</b>	<b>53%</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.

## Party trust to handle issues

Q Which party would you trust most to handle the following issues?

	Liberal	Labor	Don't know	Difference	Difference Jun2017
Security and the war on terrorism	42%	24%	35%	<b>+18</b>	+20
Management of the economy	40%	30%	29%	<b>+10</b>	+15
Controlling interest rates	34%	30%	36%	<b>+4</b>	+10
Managing population growth	30%	27%	43%	<b>+3</b>	+6
Treatment of asylum seekers	32%	31%	37%	<b>+1</b>	+1
Ensuring a quality water supply	31%	30%	39%	<b>+1</b>	-5
Political leadership	31%	33%	37%	<b>-2</b>	+8
Protecting Australian jobs and protection of local industries	28%	38%	34%	<b>-10</b>	-13
Ensuring a fair taxation system	28%	39%	34%	<b>-11</b>	-10
Ensuring a quality education for all children	29%	40%	32%	<b>-11</b>	-11
Ensuring the quality of Australia's health system	28%	39%	33%	<b>-11</b>	-11
Housing affordability	24%	36%	40%	<b>-12</b>	-12
Protecting the environment	24%	36%	41%	<b>-12</b>	-14
A fair industrial relations system	27%	40%	34%	<b>-13</b>	-14
Addressing climate change	22%	36%	43%	<b>-14</b>	-16



The Liberal Party is trusted more to handle security and the war on terrorism (+18, down 2 since June) and management of the economy (+10, down 5).

The Labor Party is trusted more to handle addressing climate change (+14, down 2), a fair industrial relations system (+13, down 1), protecting the environment (+12, down 2) and housing affordability (+12, no change).

Since this question was asked in June, the Labor Party has improved its position against the Liberal Party on political leadership (up 10), controlling interest rates (up 6) and management of the economy (up 5).



## Australian society

Q Thinking about our current political and economic system - that is, the rules and laws that govern the way Australian society operates - which of the following best describes your view?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Jan 2017	Nov 2017
The system needs to be fundamentally changed	32%	33%	22%	39%	49%	40%	32%
The system is fundamentally sound but needs to be refined	48%	54%	54%	46%	37%	44%	44%
The system works well as it is and should not be changed in any substantial way	8%	4%	14%	7%	7%	6%	10%
Don't know	12%	9%	10%	8%	7%	11%	14%

48% think Australia's political and economic system is fundamentally sound but needs to be refined and 32% think the system needs to be fundamentally changed. Only 8% think it should not be changed in any way.

Those thinking the system just needs to be refined has increased 4 points from 44% since November.

Those most likely to think it needs fundamental change were "other" voters (49%) and Greens voters (39%).

Those most likely to think the system just needs to be refined were LNP voters (54%), Labor voters (54%) and aged 55+ (54%).



## Economic issues

Q Do you think the following have become better or worse compared to 12 months ago?

	Total better	Total worse	A lot better	A little better	No change	A little worse	A lot worse	Don't know	Total better Feb 2016	Total worse Feb 2016
Company profits	42%	12%	14%	28%	27%	8%	4%	20%	30%	22%
Unemployment	32%	33%	5%	27%	29%	21%	12%	7%	13%	53%
The economy overall	30%	32%	4%	26%	31%	23%	9%	7%	12%	55%
Your personal financial situation	25%	40%	4%	21%	32%	23%	17%	4%	18%	42%
Wages	10%	39%	2%	8%	40%	25%	14%	10%	14%	35%
National debt	17%	47%	3%	14%	23%	28%	19%	14%	9%	56%
Job security	13%	47%	2%	11%	33%	30%	17%	8%	11%	53%
Cost of living	7%	73%	2%	5%	16%	41%	32%	3%	7%	71%
Electricity costs	6%	75%	2%	4%	14%	32%	43%	5%	9%	62%

A substantial majority believe that, in the last 12 months, cost of living (73%) and electricity costs (75%) have all got worse. The only economic measure that has got better is company profits (42% better/12% worse).

Compared the last time this question was asked in February 2016, there has been an increase in the percentage that think electricity costs (up 13% to 75%) have got worse. However, there has also been an increase in the percentage that think company profits (+12), unemployment (+19) and the economy overall (+18) have got better.





## Income and cost of living

Q In the last two years, do you think your and your household's income has gone up more than the cost of living, fallen behind or stayed even with the cost of living?

	Total	Work full time	Work part time	Income less than \$600 pw	Income \$600-\$1,000 pw	Income \$1,000-\$1,500 pw	Income \$1,500 - \$2,000 pw	Income \$2,000 + pw	Oct 2014	Mar 2015	Nov 2015	Feb 2016	Aug 2017
Gone up more	14%	20%	13%	10%	13%	11%	17%	20%	13%	15%	14%	13%	15%
Fallen behind	51%	46%	50%	64%	58%	59%	44%	41%	48%	50%	54%	51%	53%
Stayed even	28%	30%	29%	22%	23%	25%	34%	34%	31%	27%	26%	29%	25%
Don't know	7%	4%	8%	4%	6%	5%	5%	5%	8%	7%	5%	7%	6%

51% (down 2% since August) believe that, in the last two years, their income has fallen behind the cost of living. 28% (up 3%) think it has stayed even with the cost of living and 14% (down 1%) think it has gone up more.

64% of those earning under \$600 pw and 58% of those earning \$600-1,000 pw think their income has fallen behind while 54% of those earning over \$2,000 pw think it has stayed the same or gone up.



## Health insurance

Q Do you agree or disagree with the following statements about health insurance?

	Total agree	Total dis-agree	Strongly agree	Agree	Dis-agree	Strongly dis-agree	Don't know		Sep 2017 agree	Sep 2017 dis-agree
If the private health insurance industry wants to increase fees it should have limits to the profits it can make.	83%	8%	44%	39%	6%	2%	10%		84%	8%
The government should do more to keep private health insurance affordable	83%	11%	46%	37%	6%	2%	9%		85%	7%
The government should cap increases in private health insurance premiums at the level of inflation.	79%	9%	43%	36%	7%	2%	13%		82%	7%
Health insurance isn't worth the money you pay for it.	60%	27%	29%	31%	21%	6%	13%		60%	27%
The private health industry provides value for money	27%	62%	5%	22%	34%	28%	12%		31%	59%



	Total agree	Total disagree	Have health insurance agree	Have health insurance disagree	Had health insurance agree	Had health insurance disagree	Never had health insurance agree	Never had health insurance disagree
If the private health insurance industry wants to increase fees it should have limits to the profits it can make.	83%	8%	89%	5%	83%	11%	74%	8%
The government should do more to keep private health insurance affordable	83%	11%	92%	4%	84%	10%	71%	13%
The government should cap increases in private health insurance premiums at the level of inflation.	79%	9%	86%	8%	79%	10%	70%	8%
Health insurance isn't worth the money you pay for it.	60%	27%	52%	38%	83%	12%	67%	13%
The private health industry provides value for money	27%	62%	36%	58%	21%	73%	12%	65%

There was very strong agreement with the statements that “The government should do more to keep private health insurance affordable “ (83%), “If the private health insurance industry wants to increase fees it should have limits to the profits it can make” (83%) and “The government should cap increases in private health insurance premiums at the level of inflation” (79%).

60% agreed that “Health insurance isn’t worth the money you pay for it “ and 62% disagreed that “The private health industry provides value for money”.

There has been little change in these results since the question was asked in September.



## Interest in watching sports

Q How exciting or boring would you say each of the following sports are to watch?

	Total exciting	Total boring	Very exciting	Quite exciting	Neither exciting nor boring	Quite boring	Very boring	Don't know	Net (exciting-boring)
Tennis	45%	32%	15%	30%	21%	13%	19%	1%	<b>+13</b>
Swimming	36%	33%	7%	29%	30%	15%	18%	1%	<b>+3</b>
AFL football	40%	38%	20%	20%	21%	14%	24%	2%	<b>+2</b>
Gymnastics	31%	38%	8%	23%	30%	17%	21%	2%	<b>-7</b>
Athletics	29%	36%	5%	24%	33%	16%	20%	2%	<b>-7</b>
T20 cricket	38%	45%	16%	22%	16%	12%	33%	2%	<b>-7</b>
Basketball	30%	41%	8%	22%	27%	17%	24%	2%	<b>-11</b>
Rugby League	31%	46%	12%	19%	21%	15%	31%	2%	<b>-15</b>
Soccer	30%	45%	11%	19%	23%	19%	26%	2%	<b>-15</b>
Formula 1 car racing	28%	48%	10%	18%	21%	18%	30%	2%	<b>-20</b>
Test cricket	28%	52%	8%	20%	19%	15%	37%	1%	<b>-24</b>
Netball	19%	48%	3%	16%	29%	20%	28%	2%	<b>-29</b>
Horse racing	22%	52%	6%	16%	24%	18%	34%	2%	<b>-30</b>



Rugby Union	21%	53%	6%	15%	24%	19%	34%	2%			<b>-32</b>
Boxing	20%	54%	6%	14%	24%	18%	36%	3%			<b>-34</b>
Cycling	16%	58%	3%	13%	23%	22%	36%	2%			<b>-42</b>
Golf	13%	67%	3%	10%	19%	20%	47%	2%			<b>-54</b>

Sports which were most likely to be considered exciting to watch were tennis (45%), AFL football (40%), T20 cricket (38%) and swimming (36%).

Sports which were most likely to be considered boring to watch were golf (67%), cycling (58%), boxing (54%), rugby union (53%), horse racing (52%) and test cricket (52%).

T20 cricket was the most polarising sport – that is, more people (83%) thought it was either exciting or boring and few (16%) had a neutral view.

There were some major differences between men and women.

Men were more likely to prefer watching test cricket (39% to 18% exciting), T20 cricket (48%/26%), F1 car racing (36%/22%), rugby league (38%/23%), soccer (38%/22%) and rugby union (28%/15%). 42% of women thought watching gymnastics was exciting compared to 21% of men.



## 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.

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