

# The Essential Report

18 December 2018



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**Date:** 18/12/2018

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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 13<sup>th</sup> to 16<sup>th</sup> December 2018 and is based on 1,026 respondents.

Aside from the standard question on voting intention, this week's report includes questions on perceptions of this year and last year, attributes of party leaders, an early election and Christmas.

The methodology used to carry out this research is described in the appendix on page 20.

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 4/12/18	4 weeks ago 20/11/18	Election 2 Jul 16
Liberal	34%	34%	34%	
National	3%	4%	3%	
<b>Total Liberal/National</b>	<b>37%</b>	<b>38%</b>	<b>37%</b>	<b>42.0%</b>
<b>Labor</b>	<b>36%</b>	<b>39%</b>	<b>35%</b>	<b>34.7%</b>
Greens	11%	10%	11%	10.2%
Pauline Hanson's One Nation	7%	6%	7%	
Other/Independent	9%	7%	10%	13.1%
<b>2 party preferred</b>				
Liberal National	<b>47%</b>	<b>46%</b>	<b>48%</b>	<b>50.4%</b>
Labor	<b>53%</b>	<b>54%</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.

## Last 12 months

Q Thinking about the last 12 months, has it been a good or bad year for each of the following?

	Total good	Total bad	NET	Very good	Good	Neither good nor bad	Bad	Very bad	Don't know	2017 NET
The Australian economy	32%	26%	+6	6%	26%	36%	21%	5%	6%	+11
Australian politics in general	15%	65%	-50	3%	12%	16%	32%	33%	4%	-36
The Australian Government	16%	57%	-41	4%	12%	22%	30%	27%	5%	na
Large companies and corporations	31%	22%	+9	6%	25%	37%	16%	6%	11%	+22
Small business	29%	23%	+6	4%	25%	39%	18%	5%	9%	-2
Trade unions	21%	23%	-2	3%	18%	39%	14%	9%	17%	-7
The average Australian	28%	29%	-1	4%	24%	37%	23%	6%	6%	-6
Your personal financial situation	30%	30%	-	5%	25%	36%	18%	12%	4%	+1
Your workplace (workers)	46%	18%	+28	9%	37%	32%	12%	6%	4%	+34
You and your family overall	46%	18%	+28	11%	35%	33%	13%	5%	3%	+27
The planet	19%	38%	-19	4%	15%	38%	27%	11%	6%	-22
The Australian cricket team	30%	28%	+2	5%	25%	33%	21%	7%	10%	na

Respondents believed that 2018 has been a relatively good year for your workplace (+28) and you and your family overall (+28). It was considered a particularly bad year for Australian politics in general (-50) and the Australian Government (-41).

Relative to 2017 (as measured in December last year), this year was considered somewhat worse in terms of – Australian politics in general (down 14) and large companies (down 13). However, it was considered a little better for small business (up 8).



## Expectations for 2019

Q Thinking about the next 12 months, do you think 2019 will be a good or bad year for each of the following?

	Total good	Total bad	NET	Very good	Good	Neither good nor bad	Bad	Very bad	Don't know	2017 NET
The Australian economy	30%	28%	+2	5%	25%	33%	21%	7%	10%	+12
Australian politics in general	20%	41%	-21	5%	15%	29%	26%	15%	11%	-21
The Australian Government	18%	46%	-28	3%	15%	25%	29%	17%	12%	na
Large companies and corporations	30%	19%	+11	6%	24%	37%	15%	4%	14%	+27
Small business	32%	18%	+14	4%	28%	36%	14%	4%	13%	+5
Trade unions	23%	20%	+3	5%	18%	39%	13%	7%	20%	-2
The average Australian	32%	22%	+10	5%	27%	37%	17%	5%	10%	+2
Your personal financial situation	36%	23%	+13	6%	30%	34%	15%	8%	7%	+12
Your workplace (workers)	47%	15%	+32	11%	36%	31%	11%	4%	7%	+37
You and your family overall	48%	14%	+34	11%	37%	31%	10%	4%	8%	+31
The planet	25%	33%	-8	5%	20%	32%	22%	11%	10%	-15
The Australian cricket team	20%	24%	-4	4%	16%	31%	16%	8%	25%	na

Overall, there was a very positive outlook for your workplace (+37) and you and your family overall (+31). Expectations were also quite positive for large companies (+11), small business (+14), the average Australian (+10) and personal financial situation (+13).

Compared to last year, respondents were less optimistic about the economy and large companies but more optimistic about small business and the average Australian.





## Early election

- Q Do you think the Coalition Government should run its full term until around May 2019 when the next Federal election is due or do you think they should call an early election?

	Total	Vote Labor	Vote LNP	Vote Greens	Vote other
Should run full term	52%	40%	78%	30%	57%
Should call an early election	27%	43%	12%	45%	27%
Don't know	21%	17%	11%	26%	15%

About half think the Government should run its full term while 27% think they should call an early election. 76% of LNP voters think they should serve the full term while Labor voters are split with 43% favouring an early election and 40% wanting the Government to run its full term.

## Party expect to win next election

Q Which party do you think will win the next Federal election?

	Total	Vote Labor	Vote LNP	Vote Greens	Vote other
The Labor Party	52%	89%	30%	57%	40%
The Liberal National coalition	21%	1%	53%	6%	19%
Don't know	27%	9%	17%	37%	41%

About half think that the Labor Party will win the next Federal election and 21% think the coalition will win. 89% of Labor voters think Labor will win compared to 53% of LNP voters who think the coalition will win.

## Attributes of Scott Morrison

Q Which of the following describe your opinion of the Prime Minister, Scott Morrison?

	Total	Sep 2018	Change
Intelligent	61%	66%	-5
Hard-working	60%	60%	-
Out of touch with ordinary people	54%	51%	+3
A capable leader	49%	54%	-5
Understands the problems facing Australia	46%	51%	-5
Narrow-minded	46%	41%	+5
Superficial	45%	43%	+2
Arrogant	43%	38%	+5
Good in a crisis	41%	44%	-3
Trustworthy	39%	41%	-2
More honest than most politicians	39%	38%	+1
Visionary	38%	39%	-1
Intolerant	37%	36%	+1
Erratic	36%	29%	+7
Aggressive	34%	34%	-

Scott Morrison's key attributes were intelligent (61%, down 5% since September), hard working (60%, no change), out of touch with ordinary people (54%, up 3%) and a capable leader (49%, down 5%).

Main changes since September are for erratic (up 7%), intelligent, a capable leader, understands the problems facing Australia (all down 5%) and narrow-minded and arrogant (both up 5%).



## Leader attributes – Bill Shorten

Q Which of the following describe your opinion of the Opposition Leader, Bill Shorten?

	Total	Sep 2018	Change
Hard working	57%	58%	-1
Intelligent	56%	55%	+1
Out of touch with ordinary people	50%	50%	-
Superficial	47%	50%	-3
Arrogant	46%	50%	-4
Understands the problems facing Australia	45%	48%	-3
Narrow-minded	44%	44%	-
A capable leader	43%	43%	-
Erratic	40%	41%	-1
Intolerant	39%	39%	-
Aggressive	37%	38%	-1
Good in a crisis	36%	39%	-3
Trustworthy	34%	33%	+1
Visionary	32%	34%	-2
More honest than most politicians	31%	29%	+2

Bill Shorten's key attributes were hard working (57%, down 1% since September), intelligent (56%, up 1%), out of touch with ordinary people (50%, no change), superficial (47%, down 3%) and arrogant (46%, down 4%).

The main change since September have been for arrogant (down 4%).



## Leader attributes – comparisons

	Scott Morrison	Bill Shorten	Difference
More honest than most politicians	39%	31%	<b>+8</b>
A capable leader	49%	43%	<b>+6</b>
Visionary	38%	32%	<b>+6</b>
Intelligent	61%	56%	<b>+5</b>
Trustworthy	39%	34%	<b>+5</b>
Good in a crisis	41%	36%	<b>+5</b>
Out of touch with ordinary people	54%	50%	<b>+4</b>
Hard-working	60%	57%	<b>+3</b>
Narrow-minded	46%	44%	<b>+2</b>
Understands the problems facing Australia	46%	45%	<b>+1</b>
Intolerant	37%	39%	<b>-2</b>
Superficial	45%	47%	<b>-2</b>
Aggressive	34%	37%	<b>-3</b>
Arrogant	43%	46%	<b>-3</b>
Erratic	36%	40%	<b>-4</b>

Compared to Bill Shorten, Scott Morrison is more likely to be considered more honest than most politicians (+8), a capable leader (+6) and visionary (+6).

Bill Shorten is a little more likely to be considered erratic (+4), arrogant (+3) and superficial (+3). However, on most attributes the gap between the two leaders has narrowed since these questions were last asked in September.





## Feelings about Christmas

Q Which of the following best describes how you feel about Christmas?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Men	Women	Aged 18-34	Aged 35-54	Aged 55+	2015	2016
I enjoy Christmas a lot	<b>41%</b>	43%	45%	36%	35%	35%	46%	48%	44%	31%	36%	34%
I enjoy some things about Christmas	<b>39%</b>	35%	41%	45%	42%	42%	35%	37%	35%	45%	44%	46%
I don't enjoy Christmas at all	<b>6%</b>	8%	3%	8%	7%	6%	6%	6%	7%	5%	6%	7%
I don't really care one way or the other about Christmas	<b>13%</b>	13%	10%	10%	15%	15%	11%	8%	12%	18%	12%	11%
Don't know	<b>2%</b>	1%	2%	1%	1%	2%	1%	1%	3%	1%	1%	2%

41% say they enjoy Christmas a lot and 39% enjoy some things about Christmas. These results represent more enjoyment of Christmas to when this question was asked 12 months ago.

Women were more likely to say they enjoy it a lot (46%) as were younger respondents (48% of aged 18-34).

37% of those on incomes under \$1,000 pw say they enjoy it a lot compared to 49% of those earning over \$2,000 pw.

54% of those with children say they enjoy it a lot compared to 34% of those without children.



## Christmas activities

Q Which of the following things will you be doing this Christmas?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Men	Women	Aged 18-34	Aged 35-54	Aged 55+
Hosting or attending a Christmas lunch	<b>62%</b>	62%	67%	68%	61%	59%	66%	66%	59%	63%
Putting up Christmas decorations or tree at your home	<b>61%</b>	60%	67%	65%	57%	55%	66%	64%	61%	58%
Sending Christmas cards by post	<b>43%</b>	39%	48%	29%	53%	39%	46%	36%	38%	54%
Attending a work Christmas function	<b>36%</b>	35%	38%	43%	32%	36%	36%	46%	42%	18%
Donating to a charity	<b>36%</b>	35%	39%	43%	35%	33%	38%	41%	32%	34%
Hanging out stockings on Christmas Eve	<b>29%</b>	29%	33%	36%	22%	27%	32%	40%	33%	15%
Attending church	<b>27%</b>	26%	32%	22%	24%	27%	26%	35%	23%	21%
Participating in secret Santa (Kris Kringle) at work	<b>25%</b>	28%	28%	30%	21%	25%	26%	39%	28%	8%

62% say they will be hosting or attending a Christmas lunch and 61% say they put up Christmas decorations. 43% send out Christmas cards but just 27% will be attending church. Women were more likely to put up decorations and attend a Christmas lunch. Younger people were more likely to participate in most Christmas activities except for send out Christmas cards.

## Spending on Christmas presents

Q Approximately how much will you spend this year on Christmas presents for friends and family?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Vote other	Men	Women	Aged 18-34	Aged 35-54	Aged 55+
Nothing	9%	9%	6%	8%	10%	11%	7%	9%	9%	8%
Less than \$100	17%	19%	15%	23%	14%	18%	17%	18%	17%	17%
\$100 to \$250	21%	22%	23%	18%	17%	22%	19%	28%	15%	20%
\$250 to \$500	21%	23%	22%	20%	22%	21%	22%	18%	23%	24%
\$500 to \$1000	16%	16%	16%	18%	18%	15%	18%	14%	16%	19%
More than \$1000	9%	8%	12%	6%	12%	7%	11%	7%	13%	6%
Don't know	6%	3%	6%	8%	7%	7%	6%	5%	7%	7%
Average	<b>\$386</b>	\$367	\$419	\$350	\$434	\$345	\$426	\$346	\$435	\$370

On average, respondents said they were planning to spend a little less than \$400 on Christmas presents. Women tended to spend more than men and those aged 35-54 spent more than the older and the younger groups.



## 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 panellist 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.

