

The Essential Report

16 September 2013





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Prepared by: Essential Research

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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 12th to 15th September and is based on 974 respondents.

Aside from the standard question on voting intention, this week's report includes questions on minor parties in the Senate, the Liberal/National Government and economic conditions.

The methodology used to carry out this research is described in the appendix on page 11.

Note that due to rounding, not all tables necessarily total 100% and subtotals may also vary.

Federal politics – 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?

Q. If don't know -Well which party are you currently leaning to?

Sample size = 1,864 respondents

First preference/leaning to	Election 7 Sep 13 (current figures)	4 weeks ago 19/8/13	2 weeks ago 2/9/13	Last week 9/9/13	This week 16/9/13
Liberal		41%	41%	41%	42%
National		3%	3%	3%	3%
Total Lib/Nat	45.6%	44%	44%	45%	44%
Labor	33.6%	40%	35%	35%	36%
Greens	8.4%	8%	11%	9%	9%
Other/Independent	12.4%	8%	10%	12%	11%

2 Party Preferred	Election 7 Sep 13	4 weeks ago 19/8/13	2 weeks ago 2/9/13	Last week 9/9/13	This week 16/9/13
Liberal National	53.4%	50%	52%	53%	53%
Labor	46.6%	50%	48%	47%	47%

NB. 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 2010 election.

Election of minor parties

Q. Do you think the election of micro parties in the Senate - such as Palmer United Party, Family First, Liberal Democrats, Motor Enthusiasts Party, Australian Sports Party - is good or bad for democracy?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Other party/ Independent
Good for democracy	38%	41%	27%	45%	78%
Bad for democracy	25%	18%	39%	25%	4%
Makes no difference	22%	24%	22%	20%	12%
Don't know	15%	17%	12%	10%	5%

38% think that the election of micro parties to the Senate is good for democracy, 25% think it is bad for democracy and 22% think it makes no difference.

Older respondents were more likely to think it is bad for democracy - 42% of aged 55+ compared to 19% of those aged under 55.

Better or worse Government

Q. After the election the Coalition Government will not have a majority in the Senate – they will need the support of the minor parties and independents to pass legislation. Do you think this will result in a better or worse Government for Australia?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Other party/Independent
Total better	44%	53%	32%	62%	59%
Total worse	30%	24%	44%	20%	11%
A lot better	18%	25%	9%	26%	33%
A little better	26%	28%	23%	36%	26%
A little worse	16%	10%	24%	14%	6%
A lot worse	14%	14%	20%	6%	5%
Make no difference	10%	10%	8%	8%	18%
Don't know	16%	13%	16%	9%	12%

44% think that better Government will result from the Coalition needing the support of minor parties and independents in the Senate while 30% think it will result in worse Government.

A majority of Labor, Greens and other voters think it will result in better Government while 44% of Liberal/National voters think it will result in worse Government.

Better or worse under Liberal/National Government

Q. Under the new Liberal/National Government, do you expect the following will get better or worse?

	Total better	Total worse	A lot better	A little better	Stay much the same	A little worse	A lot worse	Don't know
Political leadership	42%	31%	23%	19%	26%	13%	18%	2%
Trust in Government	36%	36%	16%	20%	27%	14%	22%	2%
Unemployment	27%	37%	8%	19%	34%	19%	18%	2%
The economy overall	38%	30%	17%	21%	30%	16%	14%	2%
The cost of living	27%	40%	9%	18%	32%	20%	20%	1%
Interest rates	17%	31%	6%	11%	49%	18%	13%	3%
Health services	23%	42%	8%	15%	34%	20%	22%	2%
Job security	22%	43%	7%	15%	32%	21%	22%	3%
Workers rights and conditions	18%	47%	7%	11%	33%	20%	27%	2%
Company profits	47%	14%	15%	32%	34%	7%	7%	4%
The environment	18%	39%	7%	11%	40%	16%	23%	2%
Education and schools	25%	41%	7%	18%	32%	19%	22%	2%
Public services	20%	45%	7%	13%	34%	21%	24%	2%
Benefits for people on Government support - such as pensioners and the unemployed	19%	44%	7%	12%	35%	21%	23%	2%
Your personal financial situation	22%	35%	7%	15%	42%	18%	17%	1%

Respondents were more likely to expect political leadership, the economy overall and company profits will get better under the new Liberal/National Government. Trust in Government was just as likely to get better as get worse. All other issues tested were thought to be more likely to get worse - especially workers rights and conditions, public services, benefits for people on Government support, job security and health services.

State of the economy

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

	28 May 12	8 Apr 13	15 Jul 13	Total 16 Sep 13	Vote Labor	Vote Lib/Nat	Vote Greens
Total good	35%	45%	36%	40%	50%	32%	56%
Total poor	29%	26%	30%	25%	18%	35%	18%
Very good	6%	8%	6%	6%	11%	3%	11%
Good	29%	37%	30%	34%	39%	29%	45%
Neither good nor poor	33%	28%	30%	32%	29%	32%	24%
Poor	20%	17%	22%	20%	15%	28%	15%
Very poor	9%	9%	8%	5%	3%	7%	3%
Don't know	2%	2%	3%	3%	3%	2%	2%

40% described the economy as good or very good and 25% poor/very poor - 32% said it was neither. This represents a net improvement from +6 to +15 since July.

This improvement was mainly due to a shift in the opinions of Liberal/National - from 18% good/45% poor (net -27) in July to 32% good/35% poor (net -3). Labor voters have also shifted - from net +45 to net +32.

Those most likely to think the economy was good/very good were people with incomes over \$1,600pw (48%).

Australian 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?

	17 May 10	9 May 11	4 Jul 11	26 Mar 12	18 Jun 12	29 Apr 13	15 Jul 13	Total 16 Sep 13	Vote Labor	Vote Lib/Nat	Vote Greens
The right direction	51%	45%	37%	36%	43%	36%	38%	44%	40%	52%	33%
The wrong direction	25%	29%	43%	41%	32%	39%	42%	26%	33%	20%	30%
Don't know	24%	25%	20%	22%	25%	25%	20%	30%	27%	28%	37%

44% of respondents think that Australia's economy is heading in the right direction – 26% think it is heading in the wrong direction. Since this question was asked in July, “right direction” has increased 6% and “wrong direction” decreased 16%.

40% (down 26%) of Labor voters, 52% (up 34%) of Liberal/National voters and 33% (down 13%) of Greens voters think the economy is heading in the right direction. 50% of men think the economy is heading in the right direction compared to 37% of women.

Economic outlook

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

	1 Dec 08	5 Oct 09	18 Oct 10	3 Oct 11	27 Aug 12	29 Jan 13	Total 16 Sep 13	Vote Labor	Vote Lib/Nat	Vote Greens
Total better	21%	66%	40%	16%	22%	29%	38%	16%	68%	13%
Total worse	61%	15%	30%	58%	45%	37%	33%	59%	8%	58%
Get a lot better	2%	8%	6%	2%	3%	4%	7%	4%	14%	-
Get a little better	19%	58%	34%	14%	19%	25%	31%	12%	54%	13%
Get a little worse	45%	11%	20%	41%	30%	28%	23%	40%	7%	40%
Get a lot worse	16%	4%	10%	17%	15%	9%	10%	19%	1%	18%
Stay much the same	13%	15%	24%	22%	27%	27%	19%	17%	19%	20%
Don't know	5%	4%	6%	4%	6%	6%	10%	9%	5%	10%

Confidence in the economic outlook has improved since January. The percentage of respondents believing conditions will get better increased 9 points to 38%, while those believing that economic conditions will get worse over the next 12 months dropped 4 points to 33%. This is the most positive outlook recorded since October 2010.

Shifts in opinion are strongly associated with voting intention - Labor voters have shifted from 50% better/22% worse (net +28) to 16% better/59% worse (net -43). Liberal/National voters have shifted from 21% better/51% worse (net -30) to 68% better/8% worse (net +60).

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 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 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.