



**22 August 2011**



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## **Executive Summary**

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 17<sup>th</sup> to 21<sup>st</sup> August 2011 and is based on 1,010 respondents.

Aside from the standard question on voting intention, this week's report includes questions on the health system, use of social media and current share market movements.

The methodology used to carry out this research is available in appendix on page 13.

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 = 1,846

First preference/leaning to	Election 21 Aug 10	4 weeks ago	2 weeks ago	Last week	This week
Liberal		45%	47%	46%	46%
National		3%	3%	4%	4%
<b>Total Lib/Nat</b>	<b>43.6</b>	<b>48%</b>	<b>50%</b>	<b>50%</b>	<b>50%</b>
<b>Labor</b>	<b>38.0</b>	<b>32%</b>	<b>30%</b>	<b>31%</b>	<b>32%</b>
Greens	11.8	11%	10%	10%	10%
Other/Independent	6.6	9%	10%	9%	8%

2PP	Election 21 Aug 10	4 weeks ago	2 weeks ago	Last week	This week
Total Lib/Nat	<b>49.9%</b>	<b>55%</b>	<b>57%</b>	<b>57%</b>	<b>56%</b>
Labor	<b>50.1%</b>	<b>45%</b>	<b>43%</b>	<b>43%</b>	<b>44%</b>

NB. The data in the above tables comprise 2-week averages derived 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.



## Awareness of Changes to Health System

*Q. How much have you read and heard about the recent Federal Government changes concerning funding and delivery of health services?*

	<b>Total</b>	<b>Vote Labor</b>	<b>Vote Lib/Nat</b>	<b>Vote Greens</b>
A lot	8%	10%	8%	16%
Something	21%	22%	24%	19%
A little	36%	38%	37%	32%
Nothing	28%	25%	28%	30%
Don't know	7%	5%	4%	3%

Only 29% say they have heard a lot or something about the recent Federal Government changes concerning funding and delivery of health services, 36% say they have heard a little and 28% have heard nothing.

Those most likely to have heard a lot/something were aged 55+ (39%).



## **Impact of Changes on Delivery of Health Services**

*Q. What impact do you think these changes will have on the delivery of health services in Australia?*

	<b>Total</b>	<b>Vote Labor</b>	<b>Vote Lib/Nat</b>	<b>Vote Greens</b>	<b>Heard a lot / something</b>	<b>Heard a little</b>
A big impact	15%	17%	12%	21%	24%	7%
A moderate impact	35%	46%	28%	42%	42%	29%
A small impact	27%	22%	32%	15%	19%	34%
No impact	10%	3%	15%	6%	11%	10%
Don't know	13%	11%	12%	16%	4%	20%

*\* based on those who have heard a lot/something/a little.*

Of those who had heard a lot/something/a little, 50% think the health system changes will have a big or moderate impact on the delivery of health services in Australia, 27% think they will have small impact and 10% think they will have no impact.

Those who have heard more about the changes are more likely to think they will have an impact - 66% of those who have heard a lot/something think they will have a big/moderate impact compared to 36% of those who have only heard a little.

## Personal Impact of Changes to Health System

Q. What impact do you think these changes will have on you and your family?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Heard a lot / something	Heard a little
A big impact	8%	6%	9%	13%	13%	5%
A moderate impact	23%	32%	19%	20%	30%	18%
A small impact	30%	33%	25%	40%	27%	33%
No impact	26%	18%	35%	16%	24%	27%
Don't know	12%	12%	12%	11%	5%	18%

*\* based on those who have heard a lot/something/a little.*

Respondents were less likely to think the changes will have an impact on their family. Of those who had heard a lot/something/a little, 31% think the health system changes will have a big or moderate impact on them, 30% think they will have small impact and 26% think they will have no impact.

43% of those who have heard a lot/something think they will have a big/moderate impact compared to 23% of those who have only heard a little.



## Opinion of Changes to Health System

Q. And from what you've read or heard, do you support or oppose these changes in the health care system proposed by the Federal Government?

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Heard a lot / something	Heard a little
<b>Total support</b>	<b>36%</b>	<b>59%</b>	<b>21%</b>	<b>46%</b>	<b>50%</b>	<b>24%</b>
<b>Total oppose</b>	<b>13%</b>	<b>1%</b>	<b>22%</b>	<b>6%</b>	<b>17%</b>	<b>9%</b>
Strongly support	8%	20%	*	8%	13%	3%
Support	28%	39%	21%	38%	37%	21%
Neither support nor oppose	36%	28%	41%	27%	27%	44%
Oppose	8%	1%	13%	5%	9%	7%
Strongly oppose	5%	-	9%	1%	8%	2%
Don't know	16%	11%	16%	20%	7%	23%

\* based on those who have heard a lot/something/a little.

Of those who had heard a lot/something/a little, 36% support the changes and 13% oppose. Labor voters support the changes 50% to 1% oppose and Greens voters support them 46%/6%. 41% of Liberal/National voters neither support nor oppose, while 21% support and 22% oppose.

Those who have heard a lot/something are more likely to support the changes - 50% compared to 24% of those who have only heard a little.



## **Most Important issues in Health System**

*Q. What are the three most important issues in Australia's health system for you personally? (Number from 1 to 3)*

	<b>Total 3 most important</b>	<b>First</b>	<b>Second</b>	<b>Third</b>
Cost of health insurance	44%	19%	11%	14%
Quality of care in hospitals	39%	15%	13%	11%
Cost of primary care i.e. GP, specialists	34%	10%	13%	11%
Access to a GP	32%	14%	11%	7%
Cost of dental services	32%	9%	11%	12%
Access to emergency departments	30%	9%	11%	10%
Elective surgery waiting lists	26%	9%	8%	9%
Cost of hospital care	19%	4%	8%	7%
Availability of mental health services	12%	4%	3%	5%
Support for aged care	12%	3%	4%	5%
Don't know	5%	5%	1%	1%

The most important health issues were thought to be cost of health insurance (44%), quality of care in hospitals (39%) and cost of primary care (34%). Access to a GP (32%), cost of dental services (32%) and access to emergency departments were also important.

Those on lower incomes tended to give greater importance to access to a GP (37% of those earning under \$1,000pw) and cost of dental services (42% of those earning under \$1,000pw). 24% of those aged 55+ nominated support for aged care as important.



## **Best Party to Handle Australia's Health System**

*Q. Overall, which party do you think would be best at handling Australia's health system?*

	<b>Total</b>	<b>Vote Labor</b>	<b>Vote Lib/Nat</b>	<b>Vote Greens</b>
The Labor Party	26%	69%	3%	39%
The Liberal Party	33%	2%	71%	3%
No difference	27%	18%	18%	39%
Don't know	14%	10%	8%	19%

Opinions of party best to handle Australia's health system very much follow voting preferences. Overall the Liberal Party is favoured over labor by 33% to 26%. 41% either don't know or think there is no difference. 69% of Labor voters favour the Labor Party and 71% of Liberal/National voters favor the Liberals.

Men favour the Liberals 40% to 27% while women are more evenly divided - 25% Labor, 26% Liberal and 49% no difference/don't know.

Those on incomes under \$600pw favour Labor over the Liberals by 34% to 22% - all other income groups favour the Liberal Party.



## Banning Use of Social Media

*Q. The British Prime Minister has suggested that in situations such as the recent riots, people should be banned from using social media such as Twitter and Facebook. Do you agree or disagree.*

	Total	Vote Labor	Vote Lib/Nat	Vote Greens	Aged 18-34	Aged 35-54	Aged 55+	Use frequently	Use sometimes	Use occasionally	Never use
<b>Total agree</b>	<b>47%</b>	<b>51%</b>	<b>51%</b>	<b>22%</b>	<b>29%</b>	<b>52%</b>	<b>62%</b>	<b>27%</b>	<b>55%</b>	<b>52%</b>	<b>64%</b>
<b>Total disagree</b>	<b>39%</b>	<b>38%</b>	<b>36%</b>	<b>65%</b>	<b>59%</b>	<b>31%</b>	<b>29%</b>	<b>62%</b>	<b>31%</b>	<b>31%</b>	<b>25%</b>
Strongly agree	24%	25%	26%	5%	10%	28%	35%	14%	16%	24%	40%
Agree	23%	26%	25%	17%	19%	24%	27%	13%	39%	28%	24%
Disagree	24%	25%	21%	34%	30%	24%	20%	35%	20%	21%	17%
Strongly disagree	15%	13%	15%	31%	29%	9%	9%	27%	11%	10%	8%
Don't know	13%	11%	13%	13%	13%	16%	9%	10%	13%	16%	11%

47% agreed with the suggestion to ban people from using social media in particular situations such as the recent UK riots and 39% disagreed.

Those most likely to disagree were Greens voters (65%) and people aged 18-34 (59%).

Responses were strongly associated with usage. 62% of those who use social media frequently disagreed compared to 31% of those who use sometimes/occasionally and 25% of those who never use.

## Use of Social Media

Q. How often do you personally use social media such as Twitter and Facebook?

	<b>Total</b>	<b>Vote Labor</b>	<b>Vote Lib/Nat</b>	<b>Vote Greens</b>	<b>Aged 18-34</b>	<b>Aged 35-54</b>	<b>Aged 55+</b>
Frequently	34%	34%	30%	48%	58%	27%	18%
Sometimes	17%	19%	16%	22%	19%	19%	11%
Occasionally	18%	12%	21%	14%	10%	21%	22%
Never	30%	33%	32%	15%	10%	32%	49%
Don't know	1%	2%	*	1%	3%	1%	-

34% said they used social media frequently, 17% sometimes and 18% occasionally. 30% said they never used social media.

By age, 58% of 18-34's said they used it frequently compared to only 18% of over 55's. 41% of women used it frequently compared to 28% of men. Those on higher incomes were also more likely to use social media frequently - 37% of those earning \$1,000+pw compared to 27% of those earning under \$1,000pw.



## Concern About Share Market Movements

*Q. How concerned are you about the impact of current movements in the share market on your financial situation?*

	<b>Total</b>	<b>Vote Labor</b>	<b>Vote Lib/Nat</b>	<b>Vote Greens</b>	<b>Income les than \$600pw</b>	<b>Income \$600-\$1,000pw</b>	<b>Income \$1,000-\$1,600pw</b>	<b>Income over \$1,600pw</b>
Very concerned	16%	13%	21%	6%	12%	17%	16%	16%
Somewhat concerned	23%	22%	25%	12%	16%	28%	25%	23%
A little concerned	29%	30%	30%	28%	29%	26%	30%	28%
Not at all concerned	26%	28%	20%	47%	33%	24%	23%	28%
Don't know	7%	7%	4%	7%	9%	5%	6%	6%

16% said they were very concerned and 23% somewhat concerned about the impact of current movements in the share market on your financial situation. 55% were only a little or not at all concerned.

Apart from those on very low incomes, there was not much difference across income groups - 28% of those earning under \$600pw were very/somewhat concerned compared to 45% of those earning \$600-1,000, 41% of those earning \$1,000-1,600 and 39% of those on \$1,600+.

Older respondents tended to be more concerned - 49% of those aged 55+ were very/somewhat concerned compared to 32% of 18-34's and 38% of 35-54's.



## **Appendix One – Methodology**

The data gathered for this report is gathered from a weekly online omnibus conducted by Your Source. 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. Senior Your Source staff hold Australian Market and Social Research Society (AMSRS) membership and are bound by professional codes of behavior.

Essential Research has been utilizing the Your Source online panel to conduct research on a week by week basis since November 2007. Each Monday, the team at Essential Media Communications discusses issues that are topical. From there a series of questions are devised to put to the Australian public. Some questions are repeated each week (such as political preference and social perspective), while others are unique to each week and reflect prominent 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+ responses. The Your Source online omnibus is live from the Tuesday night of each week and closed on the following Sunday. Incentives are offered to participants in the form of points.

EMC 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.

