

Roy Morgan

— Research —

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The Federal Election will be closer than anyone realises

Presented by Michele Levine, CEO Roy Morgan Research

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Thanks, I did say to Greg Romanes I would step in if someone couldn't speak – I didn't expect it would be in the middle of a Federal Election campaign – but that's how it goes.

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Our business at Roy Morgan Research is about commercialisation of consumer information – today we have over \$50 million of revenue from banks, publishers, TV, radio, advertising agencies, telcos, retailing and other companies and the Government.

We do the Federal Government's national drug survey and HILDA (Household Income Labour Dynamics Australia) – a major study tracking some 10,000 household every year – to help the Government understand such things as whether unemployment (5.9% – 682,000 in June 2010), is a short term phenomenon – or whether there are people in long-term unemployment – similarly with health and poverty.

The political polling business is where we began back in 1941, but is not where our money is made. We do not work for either political party – we are independent (although all parties look at our press releases).

At the heart of the Roy Morgan Research business is asking questions, recording and analysing the answers. For nearly seventy years, with over 4 million interviews, more than 10,000 focused discussion groups and in-depth interviews, Roy Morgan Research has been representing the views of Australians to Australians.

This, of course, is at the heart of what Roy Morgan (the man) set out to do in the early 1940s.

"I have spent the best part of my life measuring public opinion. I believe people's views matter and that measuring public opinion is extremely important."

Roy Morgan

Just before he died in 1985, Roy Morgan was asked why measuring public opinion was important.

His answer, which I agree with, was in three parts as follows:

Firstly, *"To stop journalists from claiming to be able to write 'The public demands, etc.,' when they don't know what public opinion is on that particular subject."*

Secondly, to identify the real question - the central 'core' of a problem. *"This forces people to face the problem. Public opinion polls not only do this, but also make sure that (by publication) the public and journalists know the problem and the public's attitudes towards the issue (as percentages). This forces our leaders and the public to recognise the real problem and hopefully consider it."*

Thirdly, *"Publishing several times a year* reasonably accurate percentages for voting intention. This created a continuous 'election atmosphere,' rather than a phony atmosphere created by so called 'leaders' and journalists."*

I believe Public Opinion Polling in all its forms is a crucial part of the democratic process.

Today I'd like to give you a brief status report on the Federal Election; discuss some of the issues; and then talk a little about how polls are done and especially the [TV PolliGraph](#)

* Today, the Morgan Poll asks voting intention each week.

Today the ALP is in the lead ([55.5% cf. 44.5% according to the telephone Morgan Poll conducted on July 20/21, 2010](#)). This Morgan Poll taken before the debate showed an 11 point lead for the ALP – [a 20 point lead among women](#) (60%: 40%) and 2 point lead among men (51%:49%).

Julia Gillard is preferred Prime Minister over Tony Abbott [58% vs. 29%](#).

Roy Morgan weekly Consumer Confidence is high ([123.0 – July 17/18, 2010](#))

We expect the ALP's lead with Julia Gillard to have come back since the debate and will continue to narrow until Federal Election day (set for Saturday August 21, 2010) (The Morgan Polls conducted last weekend and over the last two nights will be released on Friday July 30, 2010).

Typically about half the population vote Labor and half vote Coalition, the Federal Election is played at the margins – those people who swing or change their vote, new voters, and of course electors in marginal seats.

[Issues the ALP typically 'own' include:](#)

- Health services and hospitals (45% vs. 34%)
- Education (42% vs. 36%)
- Fair workplace and industrial relations (50% vs. 31%)
- Needs of families (35% vs. 29%)

[Issues the Coalition typically 'own' include:](#)

- Managing the economy (including interest rates and cost of living) (50% vs. 31%)
- Defence and national security (48% vs. 32%)
- Improving business in Australia (54% vs. 27%)
- Needs of people outside the capital cities (50% vs. 24%)
- Reducing taxation (although when ALP was first elected in 2007 they were ahead on this issue – not anymore – especially with the Mining Tax debacle that threatened Australia's position in the world as far as sovereign risk rating). (42% vs. 35%).

The environment (47%) and climate change (41%) is an issue owned by the Greens, but the ALP was seen as better than the L-NP on these issues when they were first elected in 2007. The ALP have since lost that lead – environment (L-NP (20%) cf. ALP (17%)) and climate change (L-NP (23%) cf. ALP (21%)).

In fact since the ALP came to power late 2007, and especially since Julia Gillard became Prime Minister (on June 24, 2010), the ALP has lost ground on all 17 key issues we measure.

The L-NP has overtaken Labor as better for:

- reducing unemployment, (42% vs. 39%)
- open and honest government, (32% vs. 24%) and
- making decisions based on principle and integrity (36% vs. 26%).

[If we ask the electorate what issues are important to them \(July 20/21, 2010\)](#). The issues are in order:

- Economic issues – including day-to-day costs of living (20%, up 6% since June 25-28, 2010)
- Health and hospitals (18%, unchanged)
- Social welfare and social issues –including needs of families (16%, up 1%)
- Reducing taxation (14%, down 11%)
- Improving education (11%, up 2%).

Industrial Relations (4%, unchanged) and population size, immigration and boat people (3%, down 1%) are very low on electors' priorities.

Yet when the Federal Election was announced the first week of campaigning focused (I would say driven by the ALP) on Industrial Relations (IR) and fair work place issues and population size, immigration, boat people and national security.

And of course the gender divide dominated the discussion – an issue never considered before.

Population

Julia Gillard rejected the drive for a bigger Australia – instead talking about wanting a more sustainable Australia – [sharing the view of most Australians](#) (78% want a population less than 35 million by 2040)

However, the Morgan Poll showed clearly that 64% of electors want asylum seekers arriving by boat returned and made to apply through normal refugee channels. Tony Abbott's 'turn the boats back' policy has resonated with electors.

On Industrial Relations (IR) Tony Abbott spent the first week on the defensive over Work Choices – the difficulties for business, employers, self-employed and contractors in the new Fair Work Australia did not get an airing.

Although these were not the issues that mattered to electors – I believe the Labor Party needed to get IR and border security out into the open and discussed – even if they didn't win them.

These issues would have been sleepers – able to be brought into discussion in the last few weeks before the election and without time for the ALP to win or even neutralise them.

The gender divide

[As early as May this year the Morgan Poll](#) showed that among women Julia Gillard (37%) was preferred over Kevin Rudd (30%) as Leader of the Labor Party.

[We saw last week when the ALP had a lead of 10 points](#) over the L-NP, among women the lead was 20 points and among men only 2 points.

For those of you who watched the debate on Channel 7 and saw the PolliGraph, you would have seen just how strongly the genders divided on issues as well as leaders.

This is predictable – as Gary Morgan said

“Our issues research shows although a similar proportion of men (21%) and women (19%) want the Government to do more in the area of Economic Issues & Cost of Living – far more women (25%) than men (11%) nominate Health Issues as the most important. Education and needs of families are also important to more women than men.”

Public Opinion Polling

Essentially if you want to know how people think about something the best thing to do is ask them. That's what polls do. It's important to get a good representative sample of people, ask the right questions the right way and faithfully count and report the results.

The best way to get a representative sample of people is to survey all across Australia personally visiting a randomly selected set of addresses – interviewing people in their homes.

Next best is telephoning people (you miss people without phones and these days increasing numbers of people only have mobile phones) and most importantly many more people refuse to be interviewed by phone – so you have a less representative sample.

The worst thing is to get people to call in to register their vote or opinion, or go to a website to register their vote or opinion – you have no idea who has registered and how many times.

But polling is both science and an art – we know if we ask people about social welfare issues before we ask them how they will vote we will swing the vote to the ALP. A question on taxation will swing the vote to the L-NP. So phone polls taken in the evening seem to be biased to the news of the day – by the weekend most people have gone back to their normal state – and the Federal Election is held on a Saturday.

The best thing to do if you want to know how people feel about something is [PolliGraph](#) them.

[The PolliGraph](#) (used by Channel 7) – previously known as the Worm – is a record of how people feel as they watch and listen to a Leaders debate or a political ad, or anything else. People are recruited to come into a studio, given a hand-held dial and asked to record how they feel second-by-second (we actually capture data 4 times a second).

Moving the dial to the 'right' for positive and to the 'left' for negative – continuously tracks feelings.

The PolliGraph is very different to pushing buttons (as used by Channel 9).

2010 Election Debate – Detailed PolliGraph Analysis

When we asked our ‘balanced’ audience **who** they felt **won** the debate,

53% said Julia **Gillard**

47% said Tony **Abbott**

But if we look at the **actual scores** over the entire hour

Julia **Gillard** averaged **55%**

Tony **Abbott** averaged **56%**

Most importantly, we measured ‘voting intention’ **before** and **after** the Debate which showed a **swing to the L-NP of 1.5%**.

If this applied to the entire electorate it would **narrow the gap by 3%**.

The PolliGraph was actually a play on Politicians graph and lie detector (Polygraph) – it records how people really feel.

Contrast that with the emails that come from both leaders’ offices claiming victory in the debate giving their own spin on the event. **Polling and the PolliGraph are an important part of the democratic process.**

We think the Federal Election campaigns will begin next week – we have had two weeks of Practice.

The gender divide is important and should not be trivialised. The **real gender divide is on issues**, women for the first time have a woman in the top job – the opportunity exists for issues that are important to women to be heard and debated by both leaders and their policies articulated and debated.

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