

Federal & State Political Poll August 2024

introduction + methodology



This polling exercise was conducted independently by **WOLF+SMITH**, a strategic campaign agency based in Sydney, Australia.

Put simply, we solve problems through researchdriven campaigns.

WOLF+SMITH's data analytics identifies and anticipates change, like demographic trends, attitudinal and behavioural movements, social and cultural shifts.

We use research to identify who controls those changes and how those people can be influenced. This includes the application of behavioural economics, message and policy testing.

The campaigns we drive combine these tools to develop the strategy and the required tactics.

This is **WOLF+SMITH**'s process.

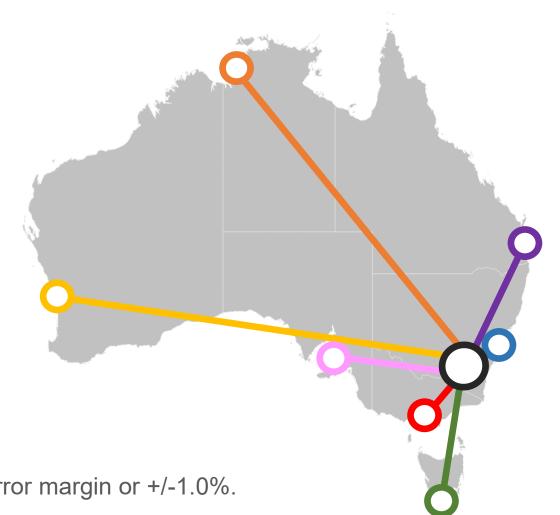
The findings of this poll is a simple illustration of **WOLF+SMITH**'s approach, and are based on a representative survey conducted as follows:

- Fieldwork between 6th 29th August 2024.
- On-line using quality 'research only' panels.
- Achieving a very large sample size of n=10,239.
- With a notional error margin of +/-1.0%*.
- Over-samples' in the smaller states for accuracy.
- Data weighted to match the general population (* including weighting state over-samples back).
- Interviews of ~8 minutes duration.
- Including pre-coded and open-ended responses.

This report contains a short summary of some of its key measures, including national and state voting intention, segments and issues.

W+S

federal politics

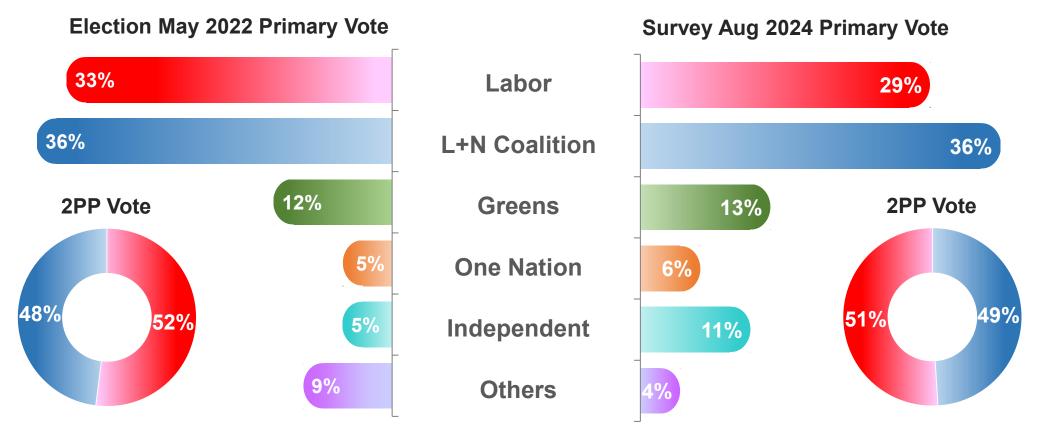


- \circ Sample of n=10,239, with a notional error margin or +/-1.0%.
- Conducted on-line between 6th 29th August 2024.

federal vote trend: position + mission



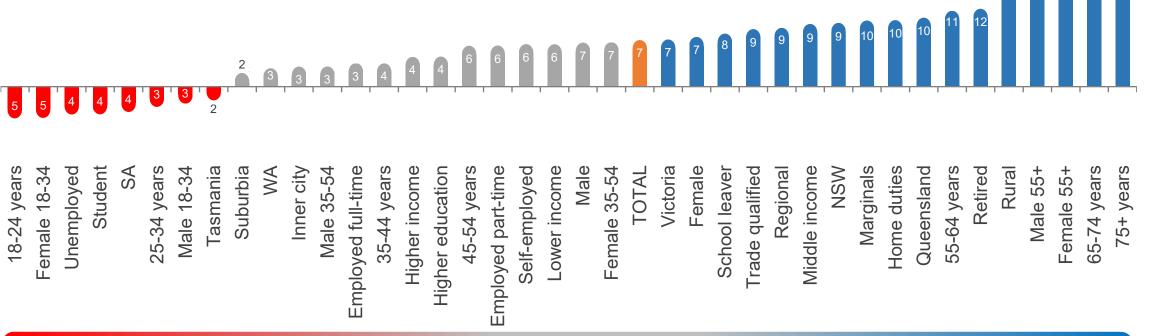
Labor have lost 4-points of primary vote off an already low base at the 2022 election, and now trail an unmoved Coalition 36% to 29%. Support for non-majors has grown to 35% and is coalescing around Greens and independents. When we apply past preference flows this equals a 1-point 2PP swing to the Coalition since 2022 as preferences favour Labor quite considerably, with Labor's majority in danger.



Fed. vote breakdowns: segments + targets



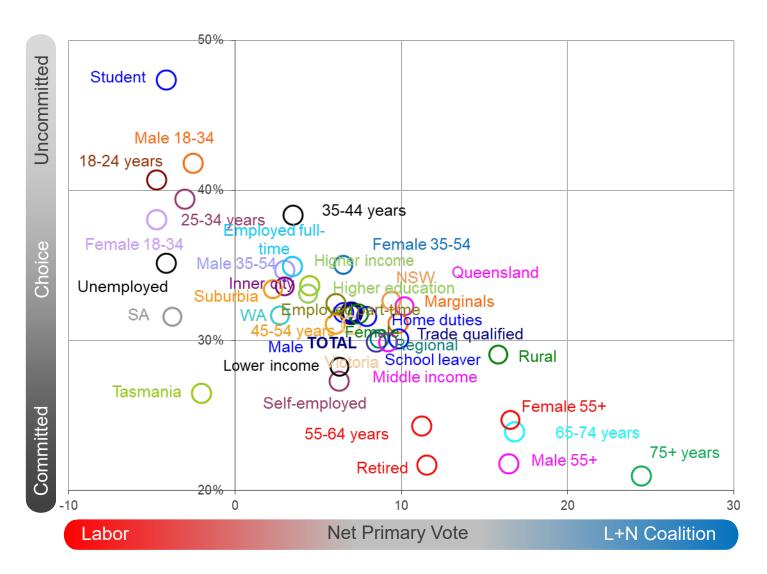
This chart shows the breakdown of net primary vote (the difference between the major parties' vote share), with the Coalition leading in most groups and in particular older voting groups, rural areas and Queensland. Labor's leads are restricted to younger people and SA, but noting that this is diluted by sharing primary vote bases with the Greens and independents in some urban areas.



Labor Net Primary Vote L+N Coalition

fed. uncommitted vote: segments + targets





It is obvious that political parties would focus their campaign efforts on those who will most efficiently deliver them an election victory, and these include defending and winning marginal seats, and in particular uncommitted voters in those seats.

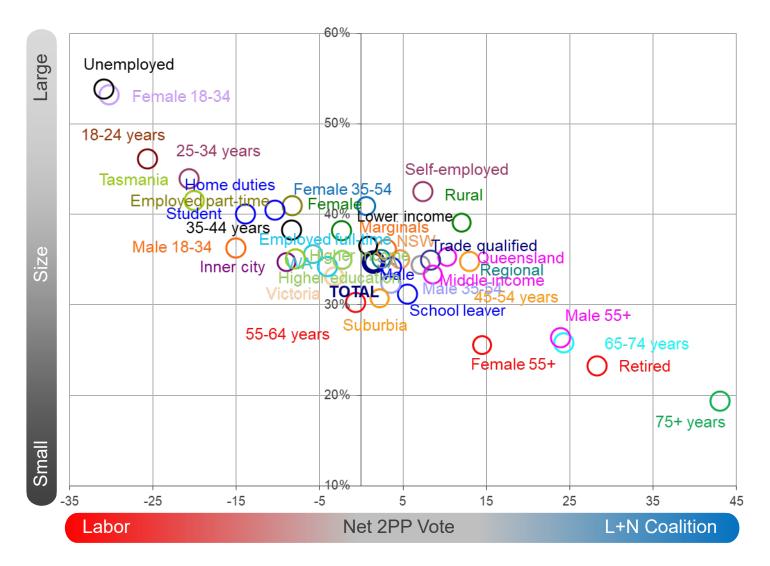
Overall, 32% of voters are currently uncommitted, so there is great leeway for change before polling day.

In particular, Labor's younger city-centric base is quite soft, and would present an attractive target to the Coalition and other opponents if not locked in.

Our research shows that these groups are disinterested in party politics, but not uninterested in issues, policy or politics.

fed. preference votes: segments + targets





With such an enlarged vote for minor parties and independent candidates, simply gaining or retaining uncommitted vote from their main opponent is not enough for the major parties anymore.

Preference harvesting from the larger groups voting for 'others' is an obvious first step, but this analysis is also an indication of how they might be won over to changing their first preferences.

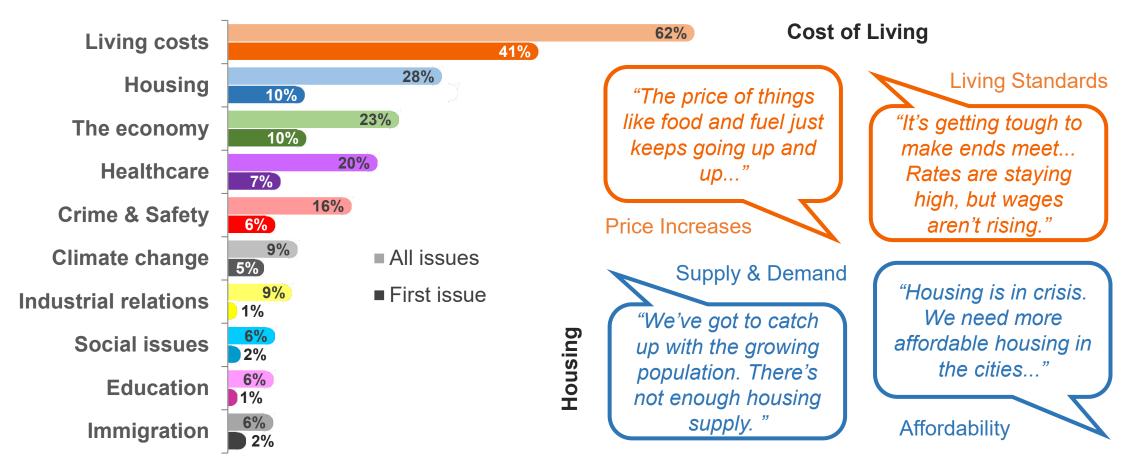
Once again, we find younger voters – typically not working full-time and with a skew to females – are most likely to be voting against the major parties, but continue to preference Labor.

This cements them as a key target for Labor in the coming months.

spontaneous issues: policy + performance



Successfully targeting these voters will involve a mix of aligned policy and relevant messaging from party leaders and local MPs who voters are confident can deliver. At present, there is one major issue that dominates for everyone: living costs. The affordability and availability of housing is linked to this theme as well.



Q) WHAT WOULD YOU SAY ARE THE MOST IMPORTANT ISSUES TO YOU AND YOUR FAMILY? THAT MIGHT BE LOCAL, STATE, NATIONAL OR WIDER ISSUES THAT YOU WOULD LIKE YOUR ELECTED REPRESENTATIVES TO FOCUS ON AND/OR ARE IMPORTANT IN DECIDING YOUR VOTE. PLEASE WRITE UP TO THREE ISSUES IN THE BOXES BELOW, WITH A SHORT EXPLANATION FOR EACH. BASE: VOTERS (N=10,239). N.B. COMMENTS ARE INDICATIVE ONLY.

spontaneous issues: policy + performance



While living costs and housing are ongoing issues, we now detect some apprehension about the direction of the economy too, i.e. inflation and recession. Older people are especially concerned about crime and healthcare too. These basic 'safety and security' issues have taken the focus away from social and green issues, though climate change remains in the top ten (and is especially salient for key younger, inner city targets).

The Economy

"The tax system needs to be looked at. It favors the wrong people, and isn't delivering."

Finances & Reform

Economic Outlook

"We've got secure jobs, but the economy doesn't look great either." Hospitals

"The hospital system is overworked so you have waiting lists, lose staff..."

"Nowhere bulk bills anymore, and insurances charge for doing nothing."

Costs

Crime & Safety

"Just the youth violence and break-ins. And domestic violence too..."

Violence

"We need tougher laws and harsher punishments, or this will just keep happening."

Penalties

"We need to be doing more to tackle emissions. It seems to have been put to one side."

Inaction

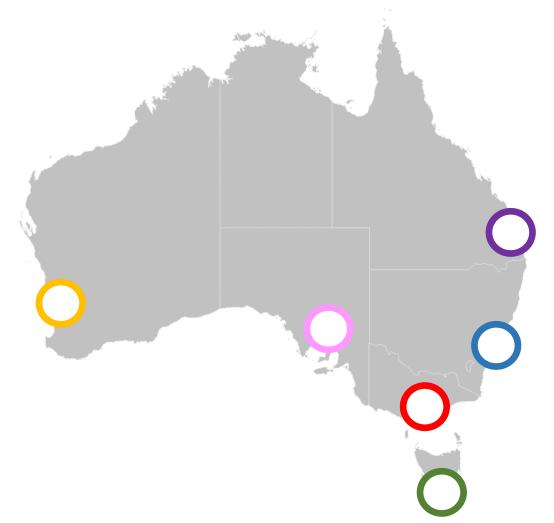
Technology

"What happened to the push for renewables? Nuclear isn't an option for Australia." Climate Change

Healthcare

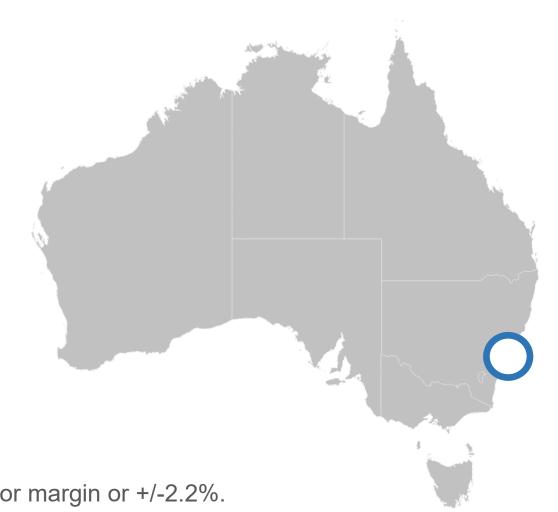
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state politics



W+S

nsw politics

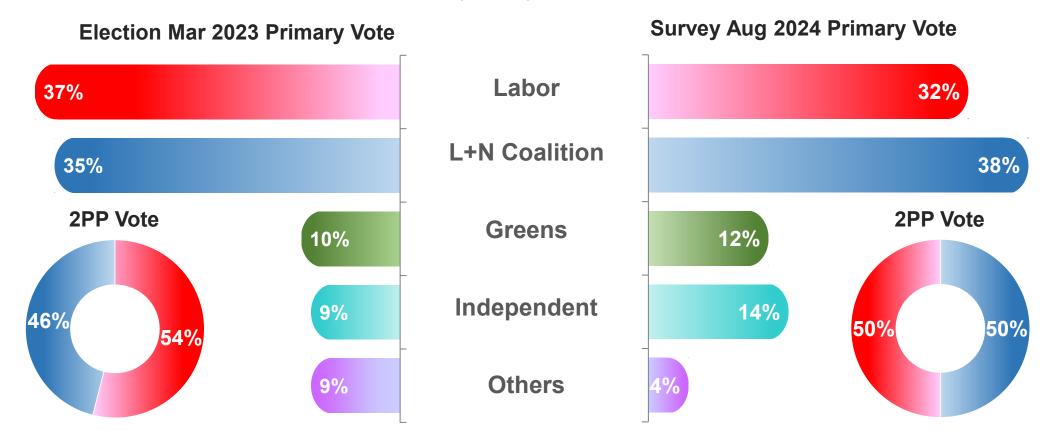


- Sample of n=2,047 with a notional error margin or +/-2.2%.
- Conducted on-line between 6th 29th August 2024.

nsw vote trend: position + mission



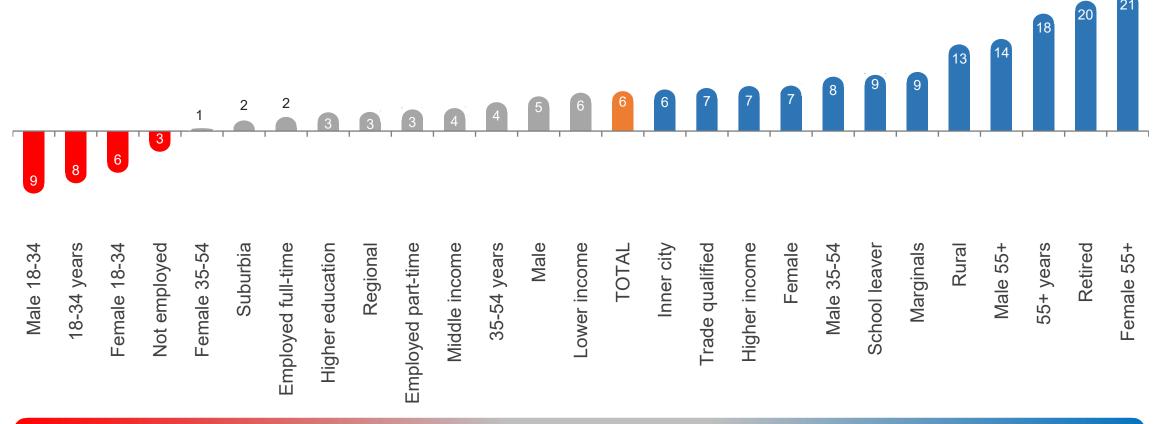
In NSW, Labor has lost 5-points of vote share pre-Liberal administration, which is fairly equally split between the Coalition and 'others' and indicative of a protest vote. After applying the optional preference flows (where voters can choose whether to preference or not) from 2023, this produces a 50-50 2PP result, but it is our observation that votes based protest are typically weak and tend to flow back to the incumbent.



nsw vote groups: segments + targets



The NSW Coalition's primary vote lead is strongest among older voters, in rural areas and marginal seats (some of which they would have lost in 2023), whereas Labor is performing better among younger people and in suburban areas.

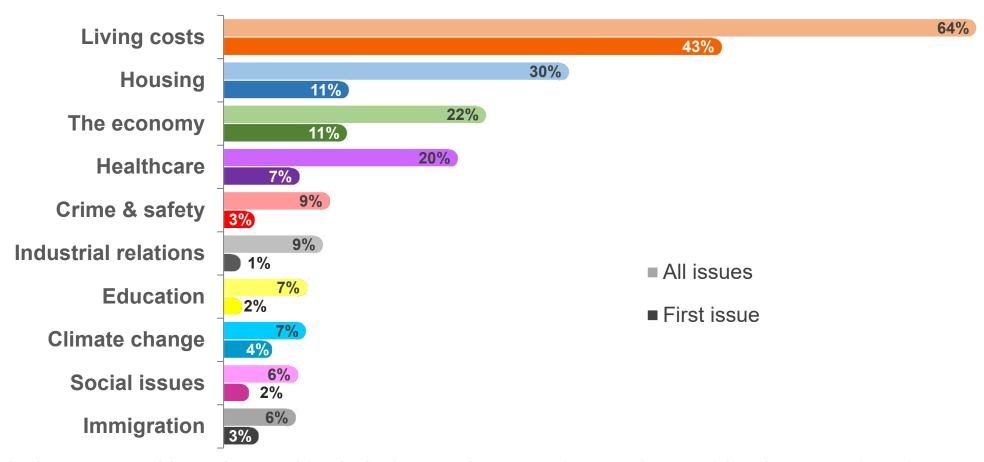


Labor Net Primary Vote L+N Coalition

nsw issues: policy + performance



Making ends meet is a particularly acute concern in NSW, with almost two-thirds reporting that living costs (groceries, insurances, fuel, etc.) are a problem for them, and a further third are concerned about house prices and availability. Social and green issues pale in comparison to these 'bread and butter' issues right now.



nsw issues: policy + performance



Below are a selection of indicative comments illustrating the focus and tone of the top four issues. It is worth noting that even housing and health comments often have a cost angle containing in them, confirming that cost pressures are dominant in NSW right now.

Living Costs

Housing

"Everything is going up. Groceries and utilities especially. It's crazy."

Price Increases

Supply & Demand

"A lack of affordable housing here... And rentals. They need to build more houses."

Living Standards

"Our wages just aren't keeping up with the cost of living. How can we pay the mortgage?"

"The cost of buying a

home. It's

impossible to get into

the market now!"

Homeowners who earn a decent wage are still struggling."

"The tax changes

have got to be fair.

Taxes

Outlook

"I can't see inflation coming down at all. The government needs to rein in the spending."

Economy

The

Healthcare

Hospitals

"We need to fix up hospitals, and not just by flooding them with nurses from overseas.

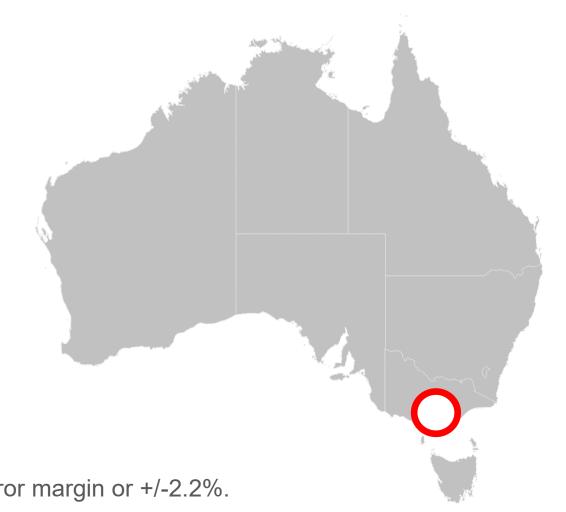
"Increase funding and allow people to bulk bill again."

Health Costs

Affordability

W+S

victorian politics

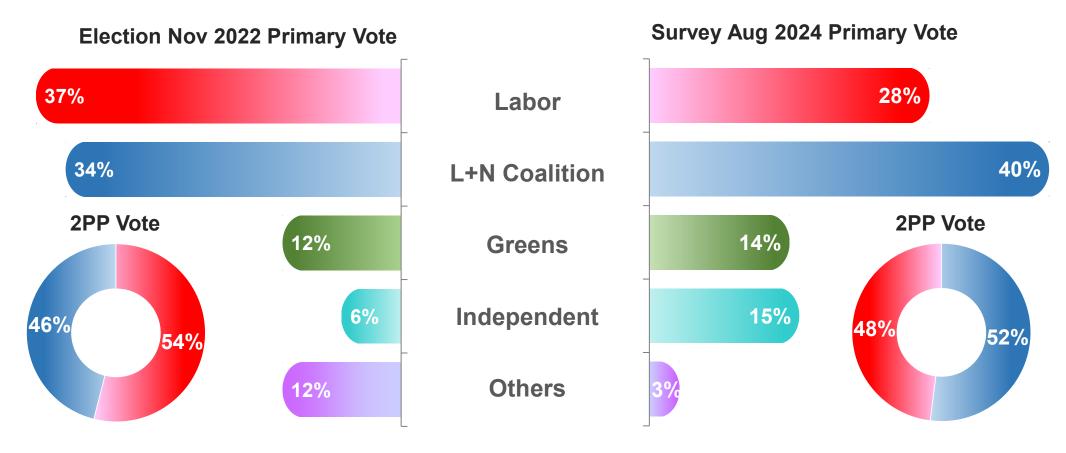


- Sample of n=2,024 with a notional error margin or +/-2.2%.
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victorian vote trend: position + mission



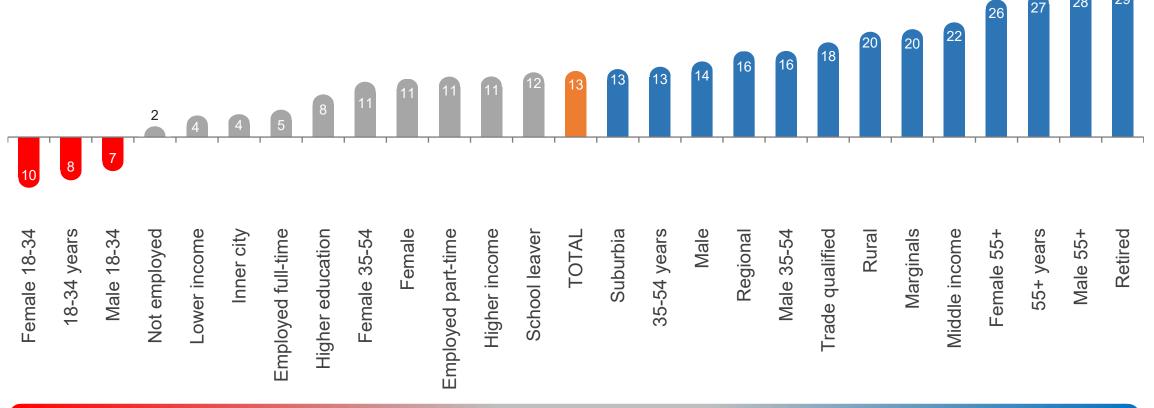
In Victoria, a fairly close primary vote split between the two major parties now favours the Coalition opposition with a 13-point lead, though the 2PP position remains much tighter. This is partly due to a third of Labor's loss flowing to 'others' – noting generic support for independent options high in this state – which then favours Labor on preferences.



victorian vote groups: segments + targets



The Coalition's primary vote lead is strongest among older and middle income groups, rural areas and, importantly, marginal seats. Labor fares better among younger voters, lower income groups and inner city voters, but noting that their bases are diluted by sharing primary vote bases with the Greens and independents.

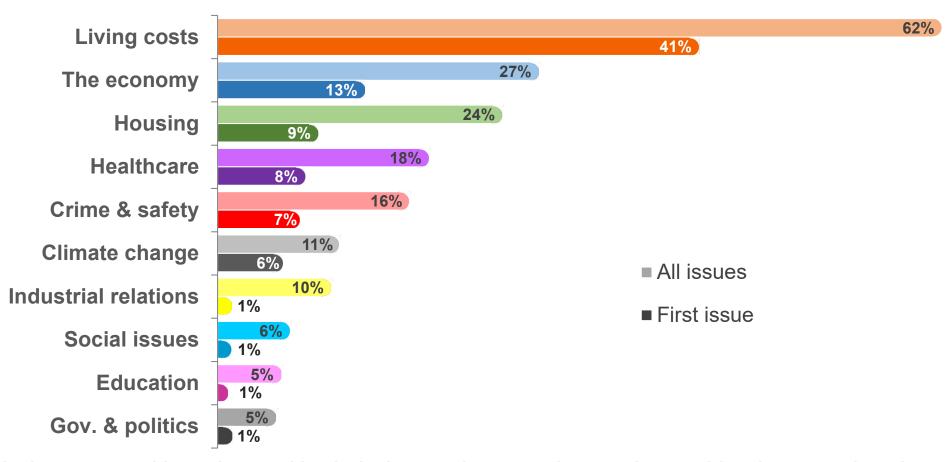


Labor Net Primary Vote L+N Coalition

victorian issues: policy + performance



Living costs are just as big a concern in Victoria as other parts of the country, but here their economic outlook is also very salient (with many comments relating to the health of the state). Housing, healthcare services and crime also figure, with such 'safety and security' issues outpolling social and environmental concerns right now.



victorian issues: policy + performance



Below are a selection of indicative comments illustrating the focus and tone of the top four issues. The sense that Victoria is falling behind other states in economic terms is born out here, but we also find that healthcare goes beyond the general to talking about the NDIS here more often than many other states.

Living Costs

The Economy

"The cost of utilities. petrol, insurances food have all increased."

Price Increases

Outlook

"We're going backwards – debt, taxes, living costs, RBA increases - and it'll collapse."

Living Standards

...it makes it harder to cover the same things you used to. Salaries haven't gone up to match."

"There's a lack of rentals in this area. Immigration levels are making it worse."

Supply

Affordability

"I'd like to own a house one day, but that's a pipedream at the moment..."

Housing

Healthcare

"We're paying way

too much in Victoria. Any business with any sense is moving interstate!"

Bus. Conditions

Services & Cost

"Availability of ambulances, beds and access to doctors within an acceptable cost. '

"The NDIS and its misuse by suppliers. The people need proper support..."

NDIS

W† S

queensland politics

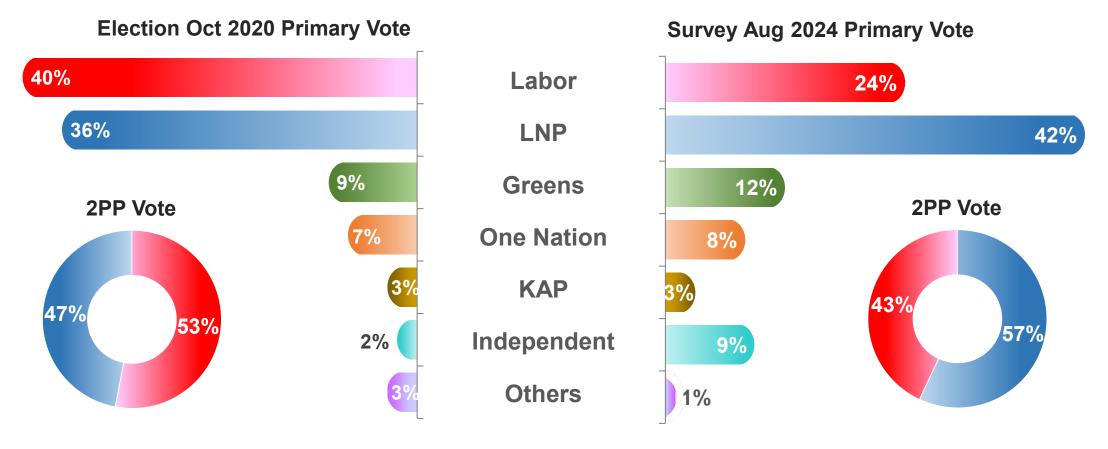


○ Conducted on-line between 6th – 29th August 2024.

queensland vote trend: position + mission



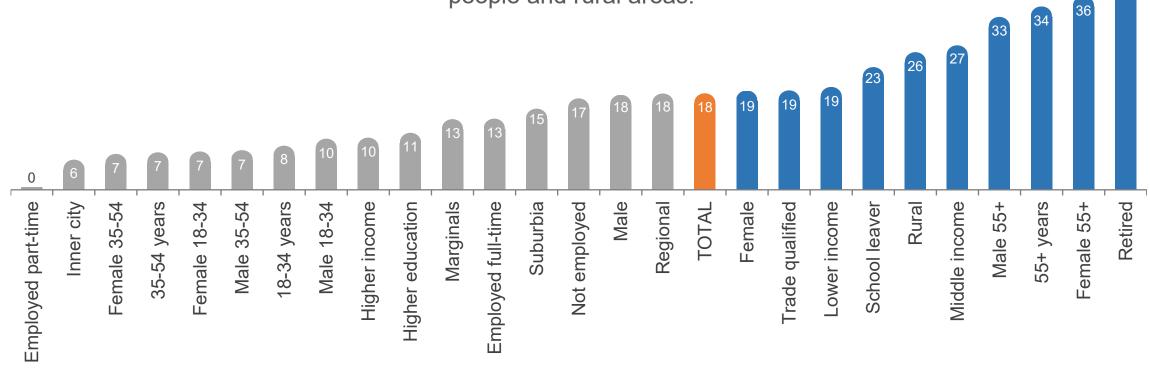
Since Palaszczuk's 2020 victory, Labor's fortunes have taken a significant turn for the worse, with their primary vote dropping fully 16-points. Only 6-points of this has flowed directly to the LNP, but it is enough to give them a very healthy 2PP lead in the lead up to the October election, especially when we factor in that the past preference flows are likely a slight understatement given the changed dynamic.



queensland vote groups: segments + targets



The sheer scale of the LNP's lead is ably illustrated by the breakdowns of net vote, where Labor fail to hold a lead in any single demographic group. Gains by the Greens in their inner city areas also make gains for them a possibility. The LNP's leads are particularly strong among older people and rural areas.

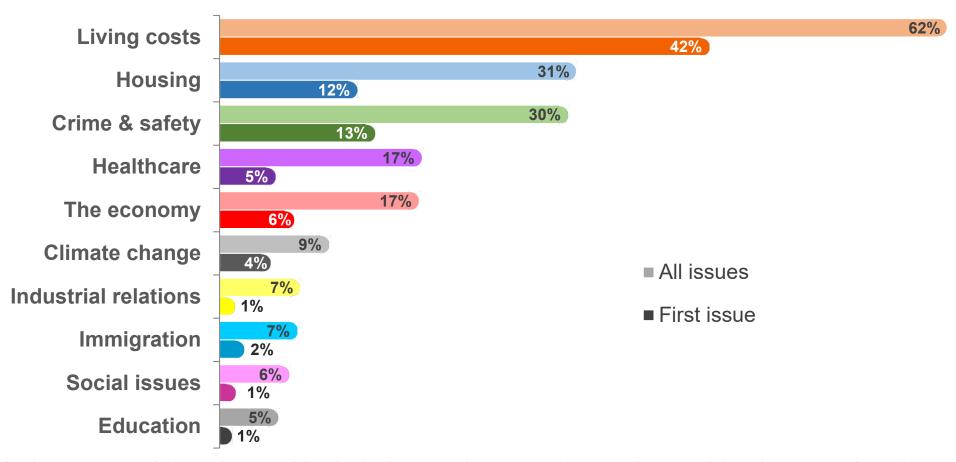


Labor Net Primary Vote LNP

queensland issues: policy + performance



There will, of course, be a variety of political factors at play in this outcome, but it is highly likely that angst at living and housing costs is being pinned on incumbents. In Queensland, we find concerns about crime are higher than any other states too, rating around double the mentions it does elsewhere.



queensland issues: policy + performance



Below are a selection of indicative comments illustrating the focus and tone of the top four issues. Perhaps most interesting are the comments relating to crime and safety – which was also the case in our NT interviews preelection – where youth crime, theft and personal safety (fear of violence) add to the other living pressures experienced in other jurisdictions.

Living Costs

"Prices of everyday goods just keep going up, like fuel and groceries."

Price Increases

Supply & Demand

Housing

"There's a housing crisis. There aren't enough rentals, let alone something to buy."

Living Standards

"After expenses there's nothing left for my spare time, so life is just working..."

"Everyone deserves

to be able to afford a

home. It's a major

issue in this country."

Affordability

"I just don't feel safety anymore, even in my own house at night."

Personal Safety

Youth Crime

"Young people stealing cars and robbing. There are no consequences...

Safety

Healthcare

Wait Times

"We need an overhaul to reduce waiting lists, get nurses... The system is not working."

"Ramping of ambulance sis untenable. The system is not coping."

Ambulances

Wt S

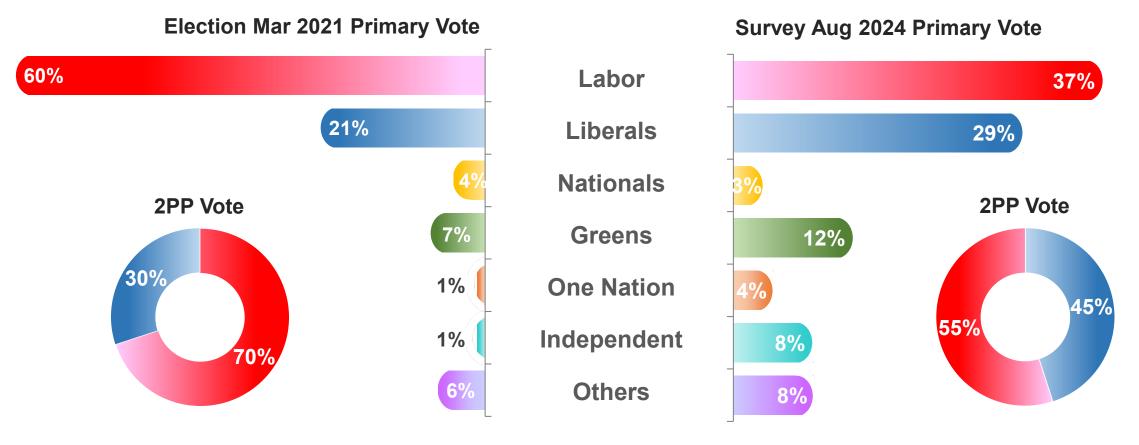
Wa politics

- Sample of n=878 with a notional error margin or +/-3.3%.
- Conducted on-line between 6th 29th August 2024.

wa vote trend: position + mission



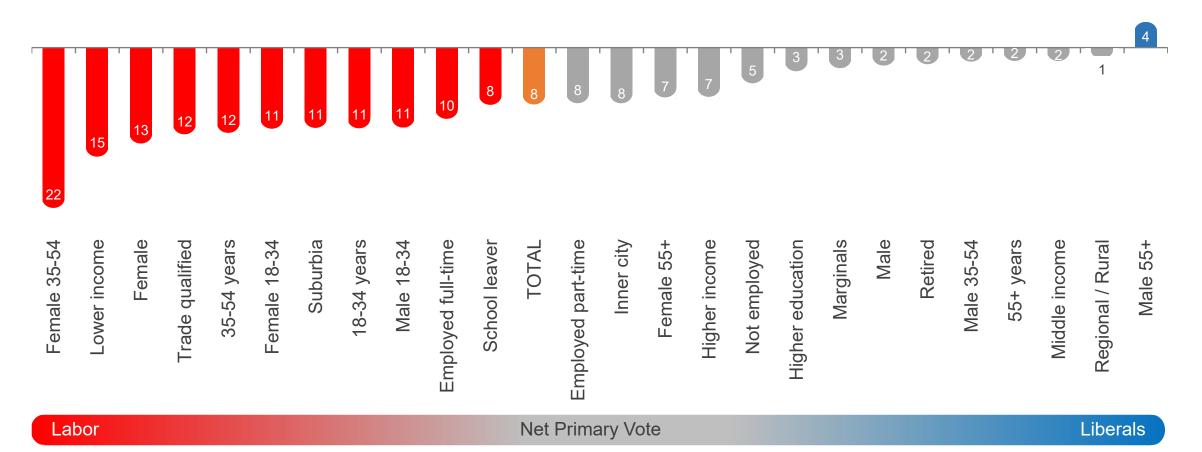
Labor has dominated WA state politics since McGowan was elected in 2017, but it has dropped back from its high point at the 2021 election to a 2PP more akin to the 2017 result. This significant swing is driven by a very large 23-point loss of primary vote, two-thirds of which is flowing to minor parties and independents rather than the Liberals (who do not operate in coalition with the Nationals in WA).



wa vote groups: segments + targets



Despite this correction, the Liberals still only hold one modest lead among older males, though they are competitive in regional areas, among middle income groups and in marginals (that would have traditionally been on their side of the ledger). Labor perform most strongly among females and lower income groups.

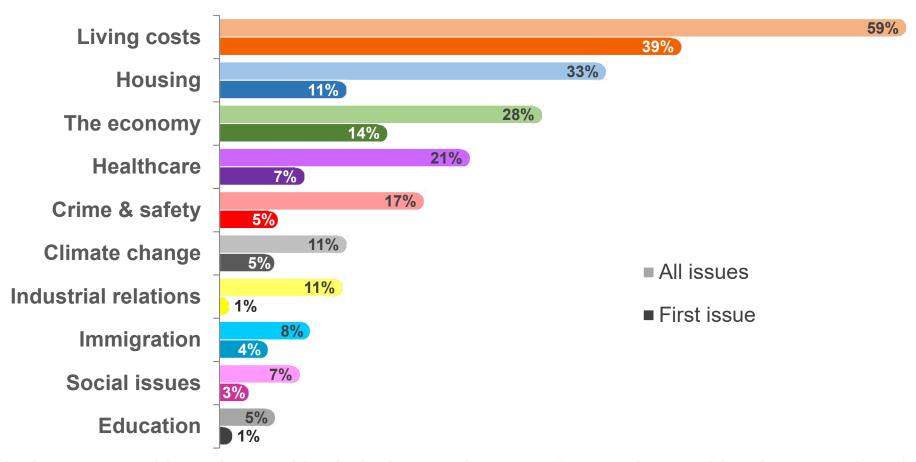


Q) IF A WA ELECTION WAS BEING HELD TODAY AND YOU WERE TO VOTE, WHICH OF THE FOLLOWING PARTIES WOULD RECEIVE YOUR FIRST PREFERENCE VOTE? BASE: VOTERS (N=878). N.B. 5% UNDECIDED / REFUSED OMITTED. * LIMITED BASE OF <N=100.

wa issues: policy + performance



It could be argued that Labor's stellar popularity in recent years was a mix of McGowan, his stewardship through COVID, a rejection of Morrison federally, and the health of the state's economy and finances. Only the latter remains now, and WA voters are also suffering with the same cost and housing pressures as other states.



wa issues: policy + performance



Below are a selection of indicative comments illustrating the focus and tone of the top four issues. Indeed, while voters recognize the advantages WA holds in terms of resources, they are still feeling the pinch of higher living costs and, more recently, elevated house prices.

Living Costs

"All costs have gone up, but supermarkets seem to go up every fortnight..."

Price Increases

Supply & Demand

"There are people living in tents and cars. We need mor houses." **Living Standards**

"Costs are going up so much that there's no way wages can keep up."

"Affordability s a big

issue when half my

salary is going on

rent!"

"Mining is strong, but we can't put all our eggs in one basket."

Diversity

Outlook

"I don't have confidence that we're going to avoid a recession the way we're going."

Hospitals

"There's a lack of beds, poor theatre availability and long waiting periods." "Affordability of basic GP services. What happened to bulk billing?

Health Costs

Housing

Affordability

Q) WHAT WOULD YOU SAY ARE THE MOST IMPORTANT ISSUES TO YOU AND YOUR FAMILY? THAT MIGHT BE LOCAL, STATE, NATIONAL OR WIDER ISSUES THAT YOU WOULD LIKE YOUR ELECTED REPRESENTATIVES TO FOCUS ON AND/OR ARE IMPORTANT IN DECIDING YOUR VOTE. PLEASE WRITE UP TO THREE ISSUES IN THE BOXES BELOW, WITH A SHORT EXPLANATION FOR EACH. BASE: VOTERS (N=878). N.B. COMMENTS ARE INDICATIVE ONLY.

Economy

The

Healthcare

S S

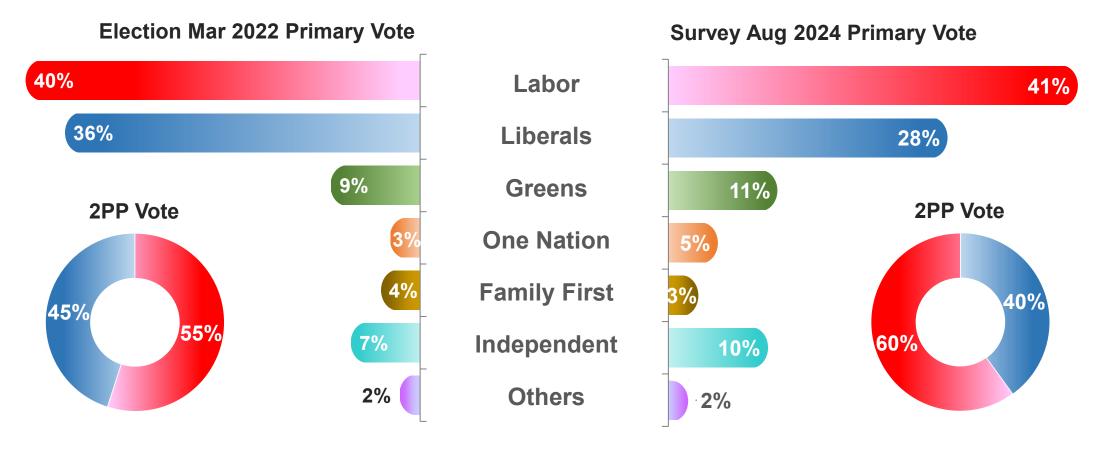
Sa politics

- Sample of n=856 with a notional error margin or +/-3.3%.
- Conducted on-line between 6th 29th August 2024.

sa vote trend: position + mission



Labor have extended their lead over the Liberals in SA since their 2022 victory, but primarily because of a loss of primary vote support for the Liberals than any bolstering of their already healthy base (noting this poll was taken as the Liberals were choosing a new leader). In any case, when we apply past preference flows, we find a 5-point 2PP swing to Labor.

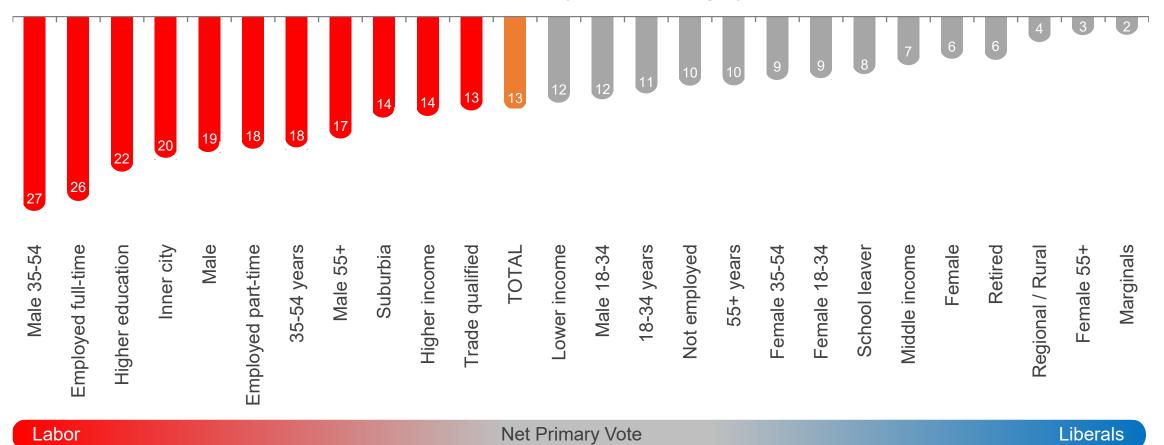


Q) IF A SA ELECTION WAS BEING HELD TODAY AND YOU WERE TO VOTE, WHICH OF THE FOLLOWING PARTIES WOULD RECEIVE YOUR FIRST PREFERENCE VOTE? BASE: VOTERS (N=856). N.B. 5% UNDECIDED / REFUSED OMITTED. ^ ACTUAL ELECTION RESULT (SAEC).

sa vote groups: segments + targets



In a sign of Labor's supremacy in SA, the Liberals trail them in every single demographic group surveyed (though they are still competitive in many of the marginals they lost in 2022). Labor fare best in inner city areas, males, those employed and/or highly educated.

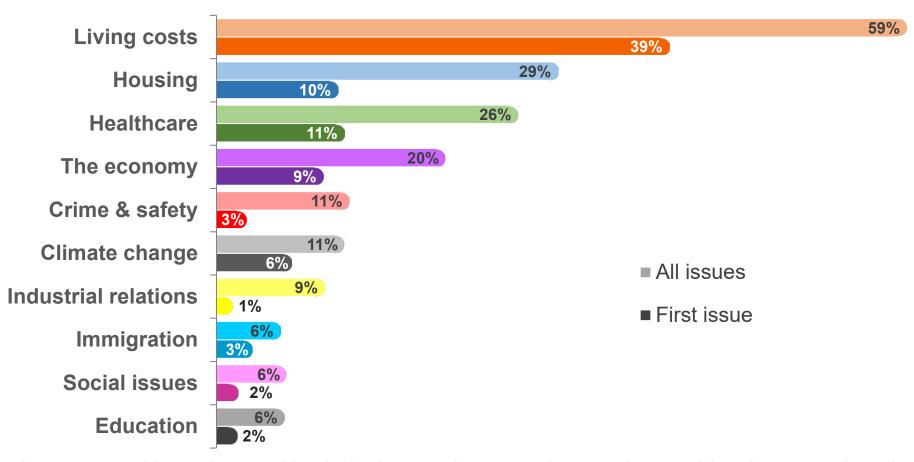


Q) IF A SA ELECTION WAS BEING HELD TODAY AND YOU WERE TO VOTE, WHICH OF THE FOLLOWING PARTIES WOULD RECEIVE YOUR FIRST PREFERENCE VOTE? BASE: VOTERS (N=856). N.B. 5% UNDECIDED / REFUSED OMITTED. * LIMITED BASE OF <N=100.

sa issues: policy + performance



The same concerns are representing in SA as in other states, including high living costs, housing availability and affordability and the health of the economy, but healthcare services appear to be of higher order concern in SA compared to some other jurisdictions.



sa issues: policy + performance



Below are a selection of indicative comments illustrating the focus and tone of the top four issues. Generally speaking, people in SA are saying similar things to those in other states on these issues, but there seems to be some more specificity to their gripes about the healthcare system beyond generic cost and access.

Living Costs

Housing

"We can't afford quite basic things. It's hurting most people now..."

Price Increases

Living Standards

"We're a wealthy country, but it doesn't feel like it when paying the bills is tough."

"Getting timely access... I've been waiting for an ENT

for nearly four years!"

Wait Times

Hospitals

"The availability of hospital beds, outpatient services and the ambulance ramping too."

Healthcare

Supply & Demand

"We've got free up housing for young people. Maybe get rid of negative gearing. "

"I still live with my parents at 25-years old. There's no way I can afford to move out."

Affordability

Outlook

"Businesses are suffering under the current conditions. and don't think it's getting any better."

"We seem to be paying a lot of taxes for our income. Everything is taxed."

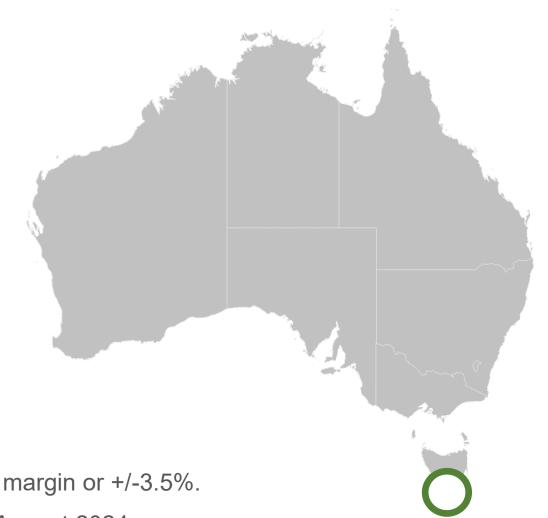
Taxes

Economy

The

W+S

tasmanian politics

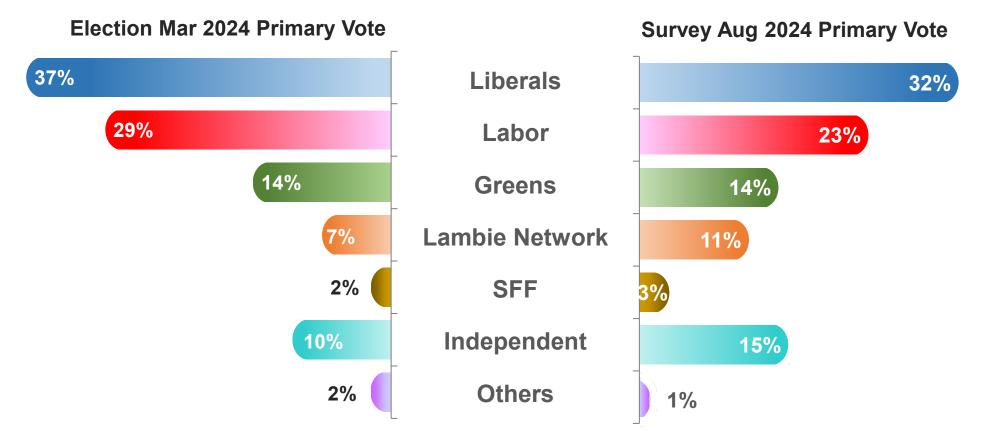


- Sample of n=786 with a notional error margin or +/-3.5%.
- Conducted on-line between 6th 29th August 2024.

tasmanian vote trend: position + mission



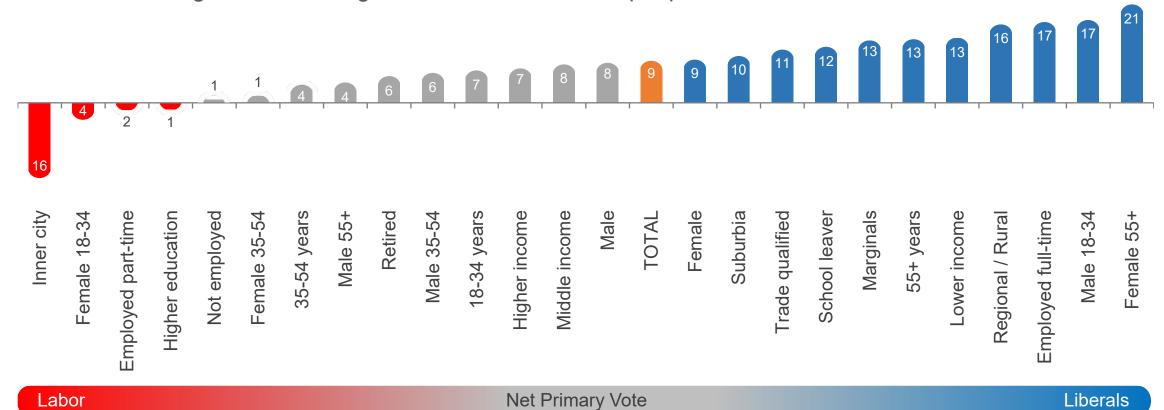
Unusually, Tasmania uses the proportional Hare-Clark electoral system across five multi-member electorates. However, it is still valid to look at the overall primary vote to determine the relative standing of the main contenders, and here we find a significant drop for the major parties since the election earlier this year flowing to the Lambie Network (the subject of instability since this poll) and generic independent options.



tasmanian vote groups: segments + targets



Tasmania is increasingly becoming a more complex mix of parties, but the two major parties still take the majority of primary votes and one or the other is required to form a government. It is therefore useful to look at their relative leads in different demographic groups. Labor leads only in urban centres, among those working part-time and those with higher educations. The Liberals strongest leads are among those working full-time, in regional / rural areas, older people and those with lower incomes.

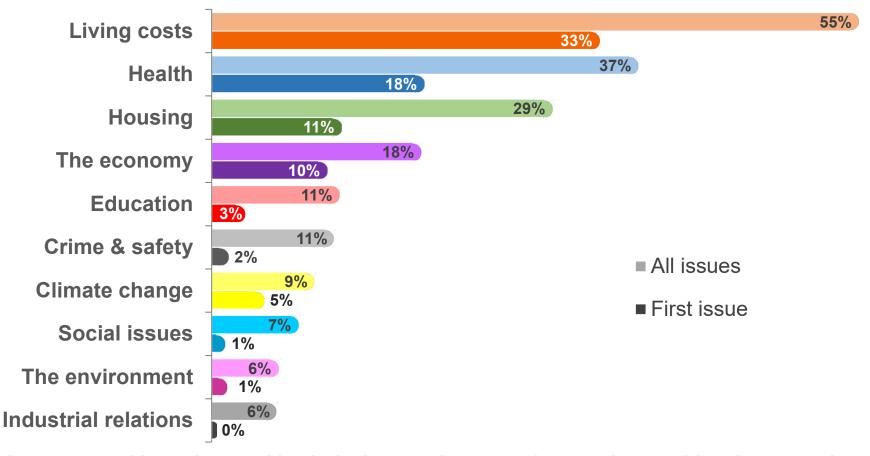


Q) IF A TASMANIAN ELECTION WAS BEING HELD TODAY AND YOU WERE TO VOTE, WHICH OF THE FOLLOWING PARTIES WOULD RECEIVE YOUR FIRST PREFERENCE VOTE? BASE: VOTERS (N=786), N.B. 2% UNDECIDED / REFUSED OMITTED. * LIMITED BASE OF <N=100.

tasmanian issues: policy + performance



Healthcare appears to be a particularly salient concern for Tasmanians at this time, being nominated as an issue by more than a third. Otherwise, they tend to be focused on the same economic and financial pressures as those in other states, with living costs dominating their issue agenda.



tasmanian issues: policy + performance



Below are a selection of indicative comments illustrating the focus and tone of the top four issues. Health concerns cover a large range of areas and a lack of investment here is seen to be costing more in the longterm. A lack of long-term benefits is also a theme that recurs in comments about the economy and housing.

Living Costs

"I think it affects everyone, but I'm barely able to make it to the end of the week now...'

Price Increases

Services

"It's everything really. Hospital places, GPs and mental health services are all

Living Standards

"The more I have to pay out day-to-day the less I have for a house or a family."

"If people can't afford

to go to the GP in the

first instance it costs

"The cost of housing, and also compacted by rates which are adding hundreds of dollars a week."

Prices & Rates

Supply

understand that we nee to protect farmland, but there just aren't enough homes."

Tax Reform

"We've got to cut taxes for ordinary people. \$1,400 just doesn't cut it when soe are doing well."

'The economy needs to start paying for people. I pay payroll tax, GST, income tax..."

Economic Dividend

Healthcare

more down the line." lacking." Affordability

Housing

The **Economy**



Federal & State Political Poll August 2024