

Research Update

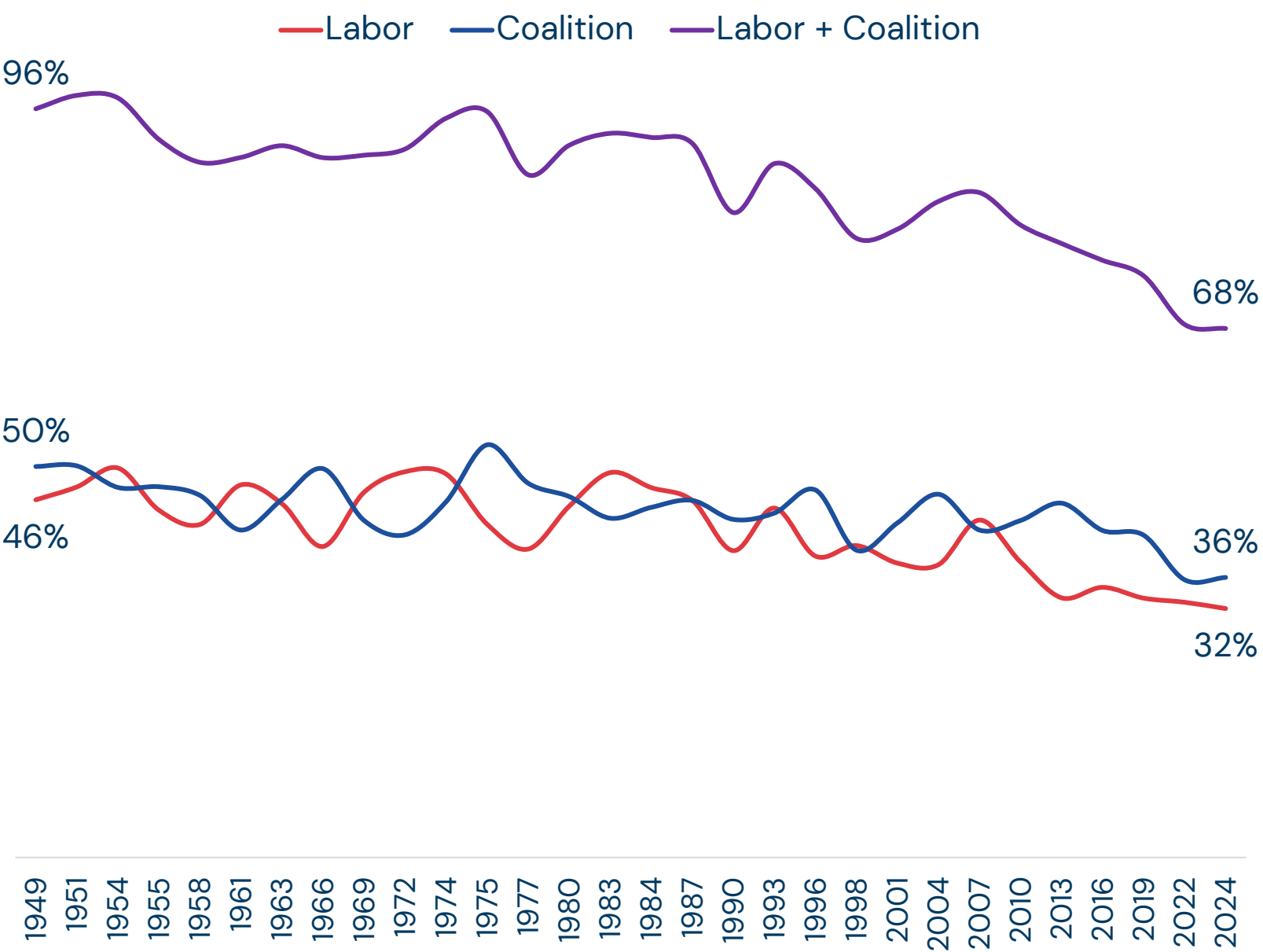
January 2025

Climate200

Vote Intention

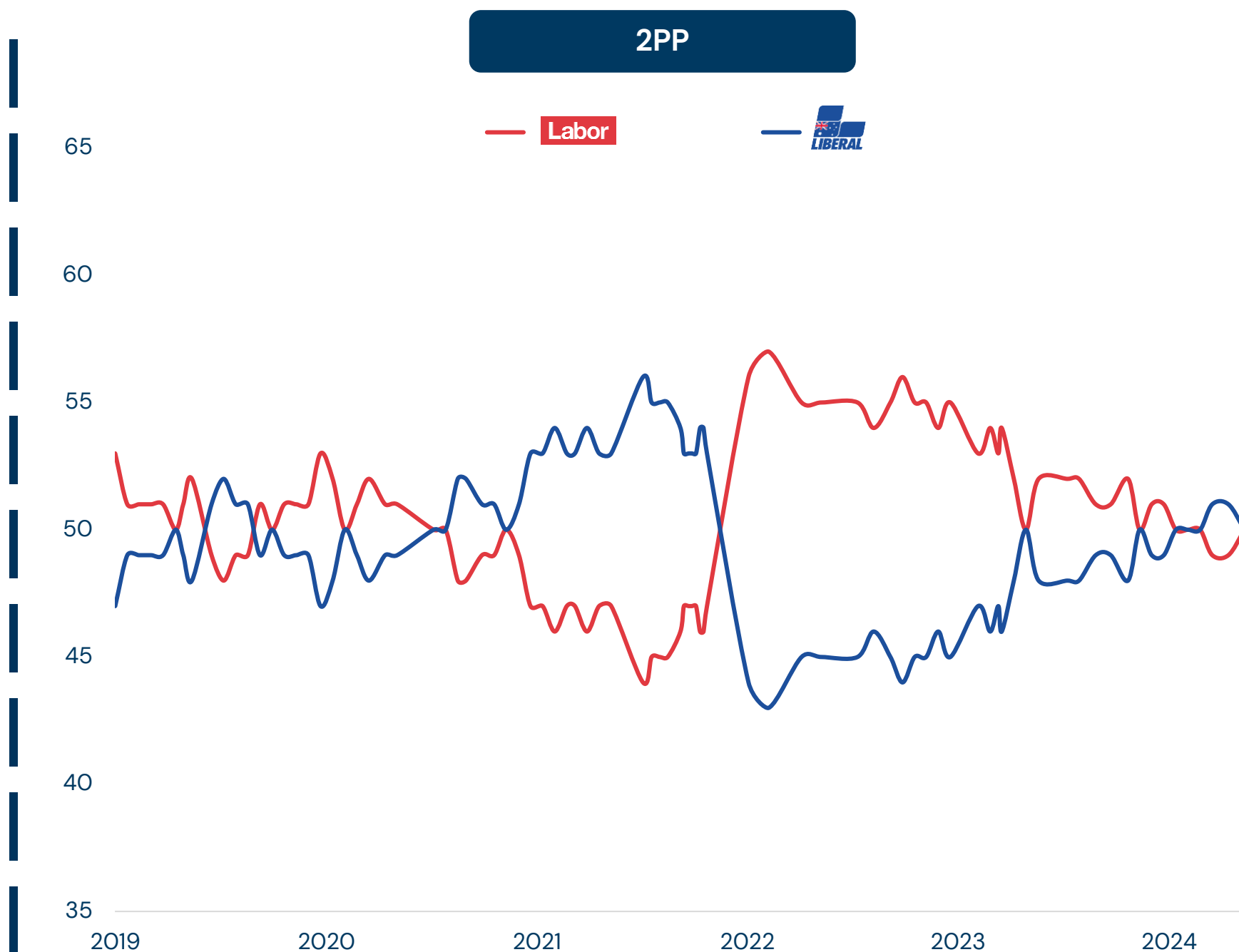
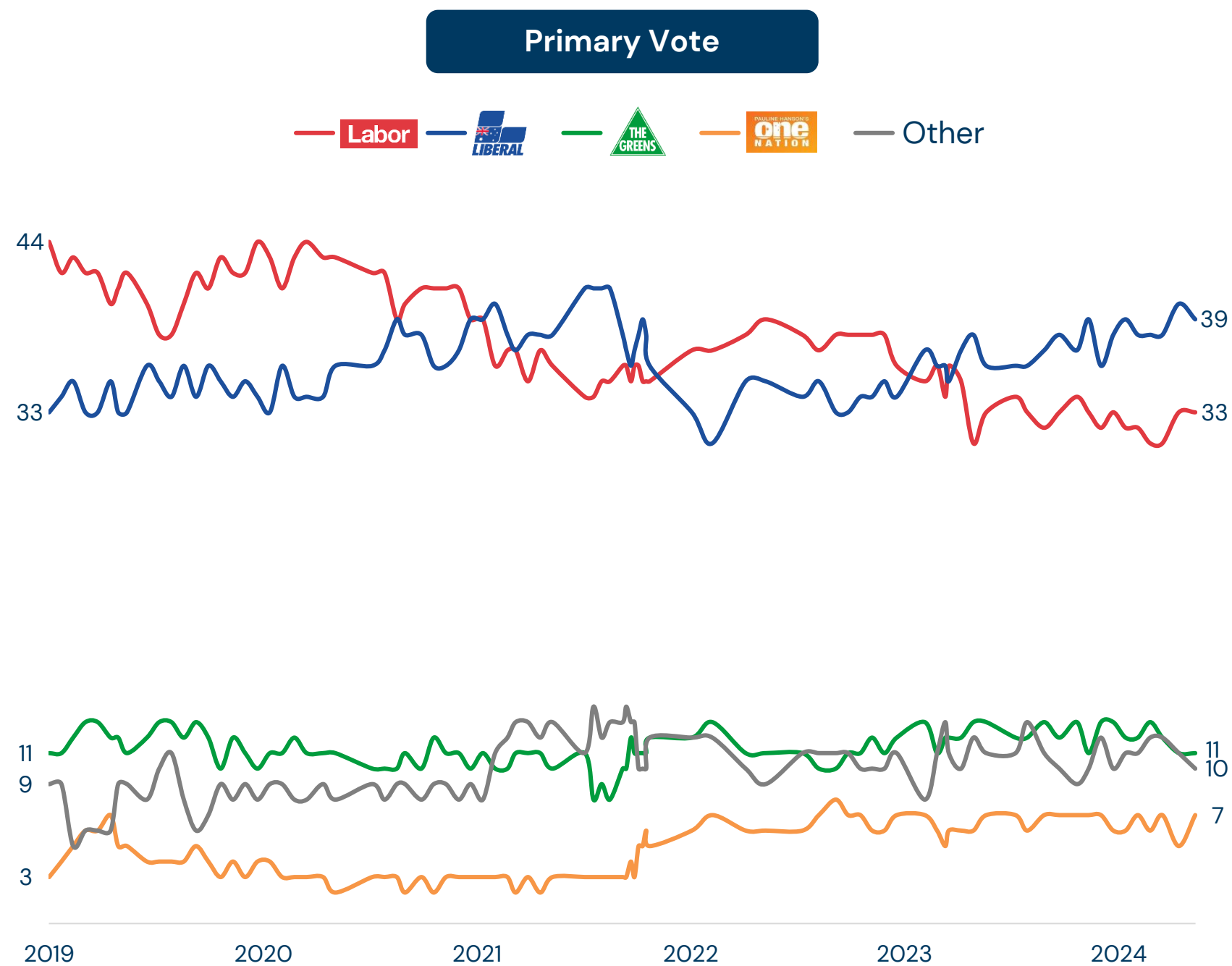
The dominant dynamic in Australian politics is a declining major party vote

Major Party Primary Vote



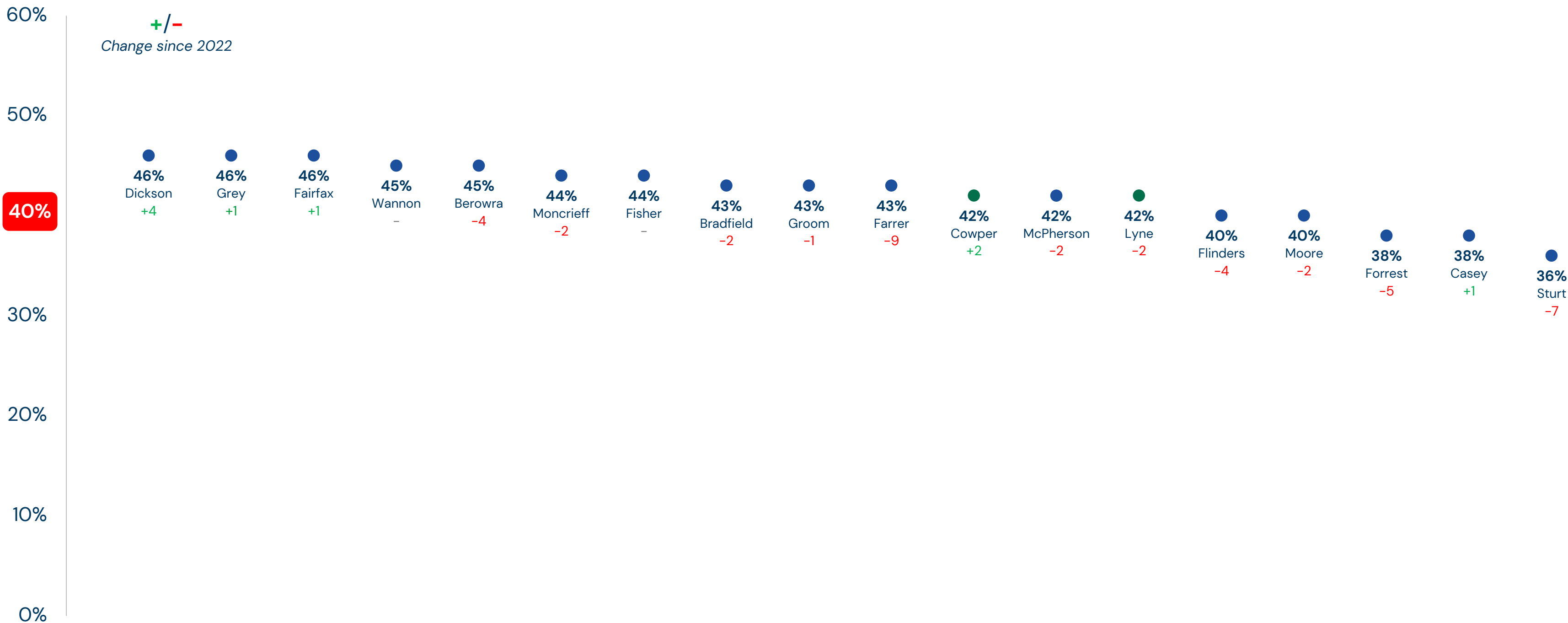
Despite this, the prevailing narrative about a 2-party race conceals the increasing desire for an alternative

Primary Vote – Newspoll (since 2022)



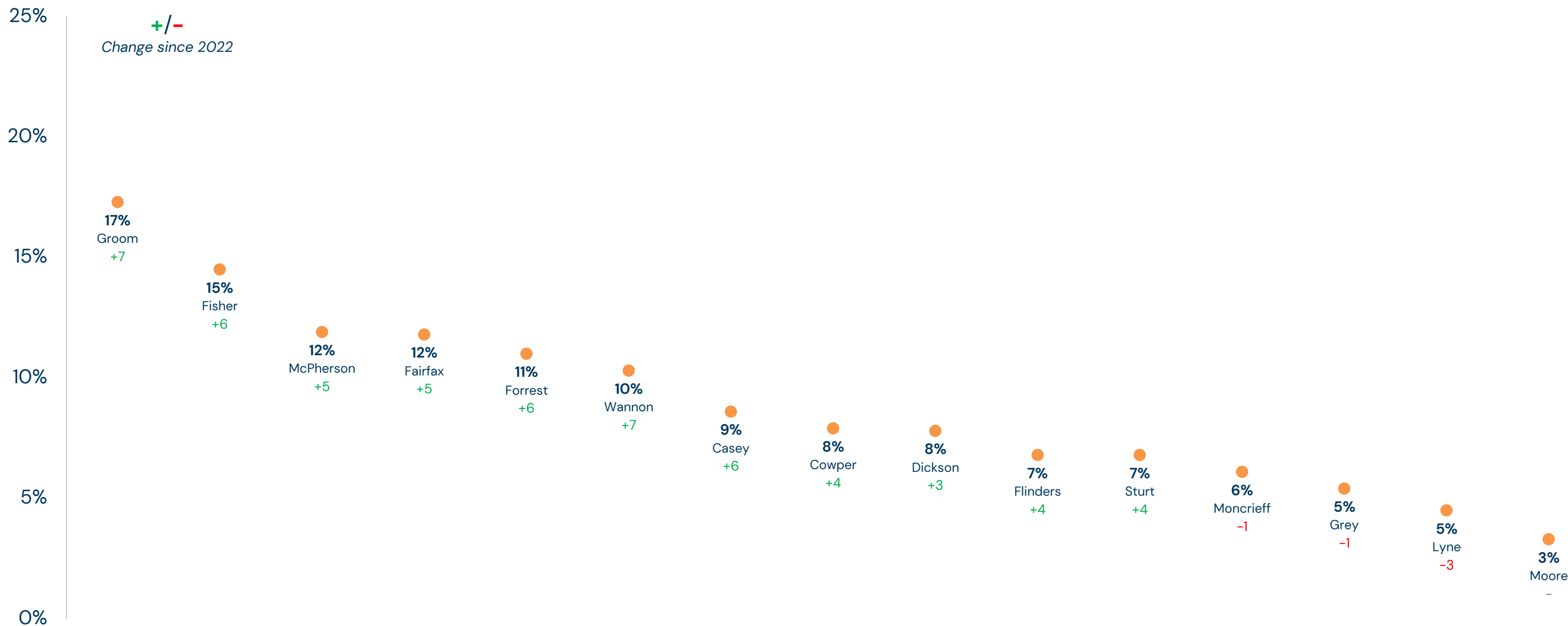
The Coalition primary vote has dropped since 2022 in the majority of seats we've polled

Vote Intention: The Coalition (Latest Polling)



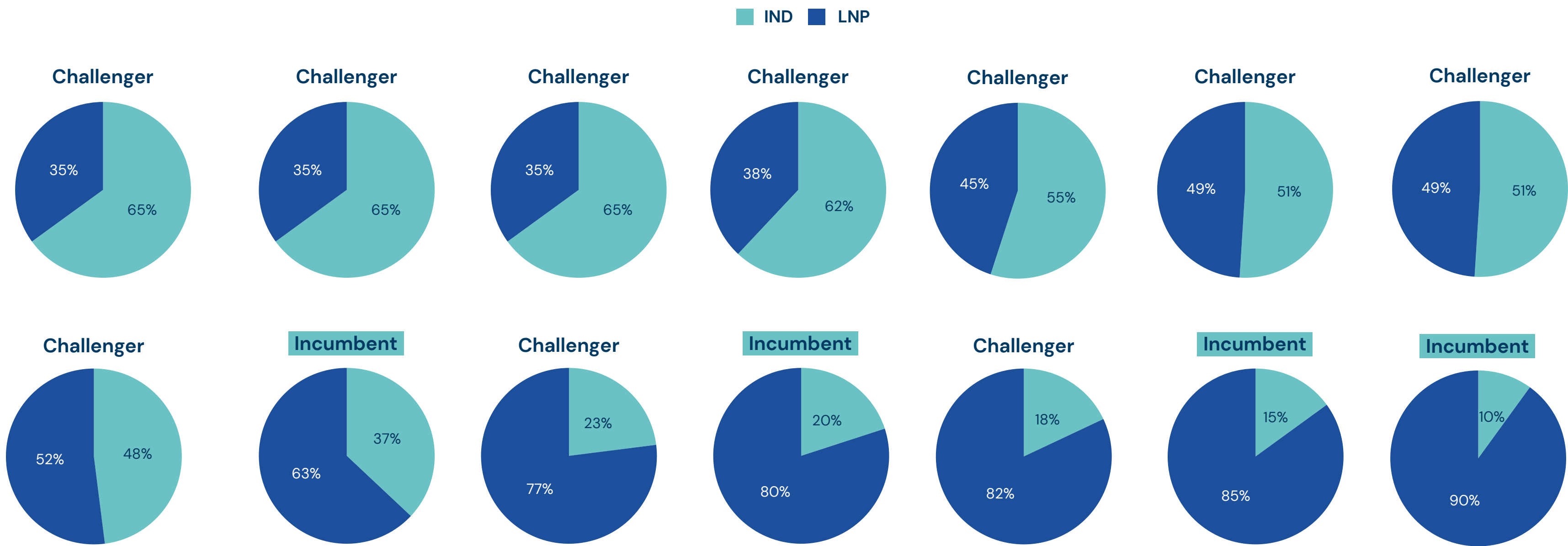
One Nation's primary vote is up in nearly all the seats we've polled

Vote Intention: One Nation (Latest Polling)



However, nearly half of these One Nation voters would prefer to see an Independent win over the Liberal Party

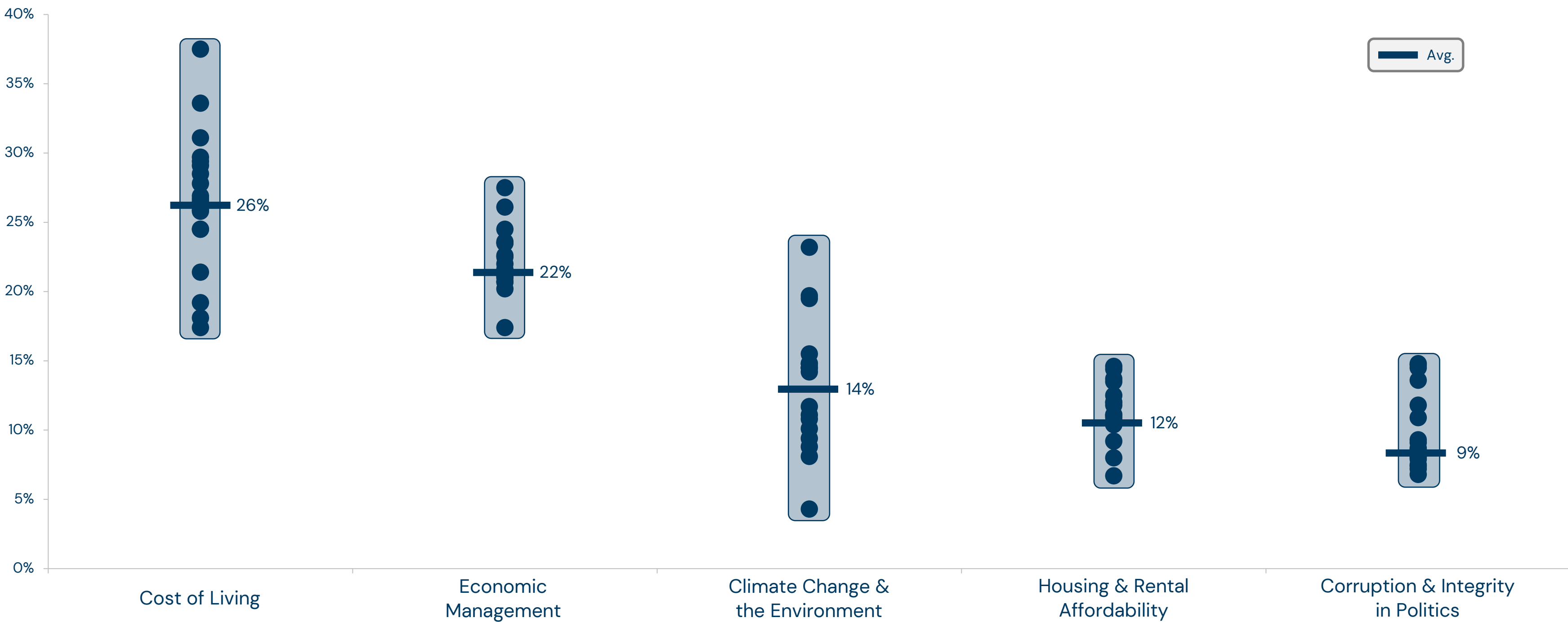
2-Candidate Preferred: IND vs. LNP | One Nation Voters



Voter Issues

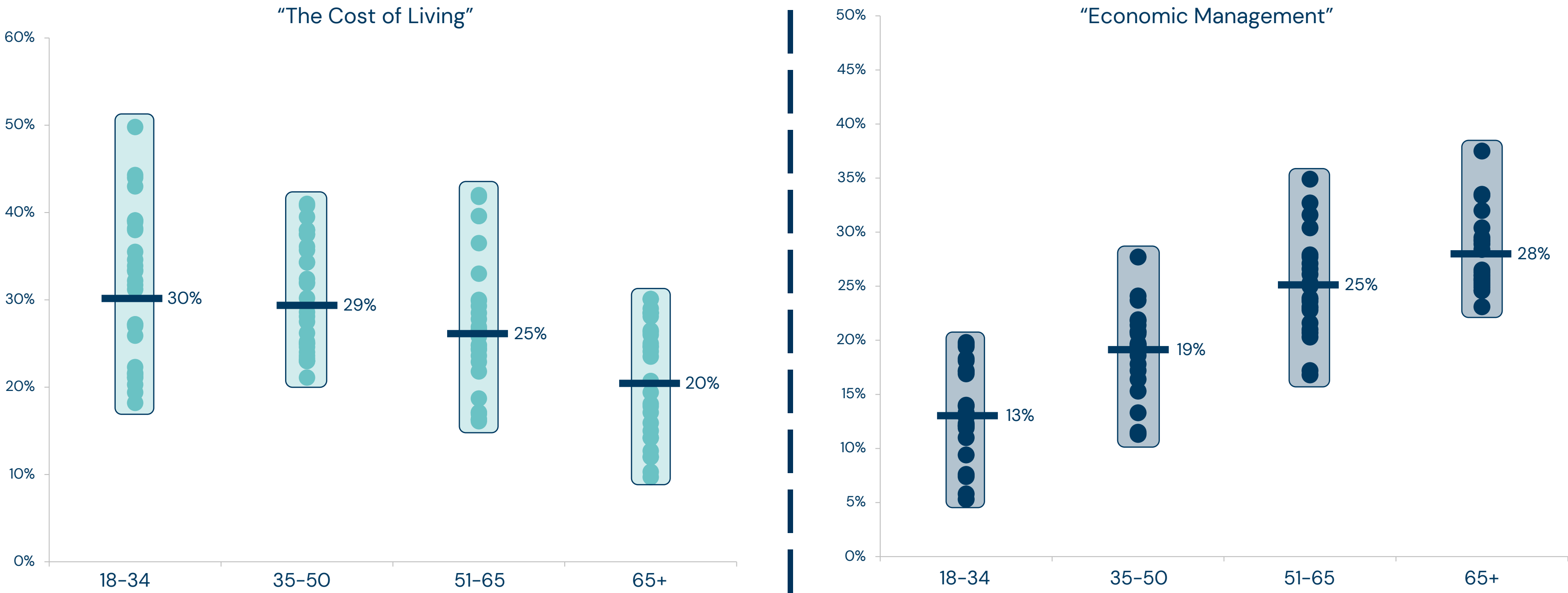
Cost of living and economic management dominate the top issues, with the secondary issues varying by seat

Top Issues Affecting Vote | All Polls



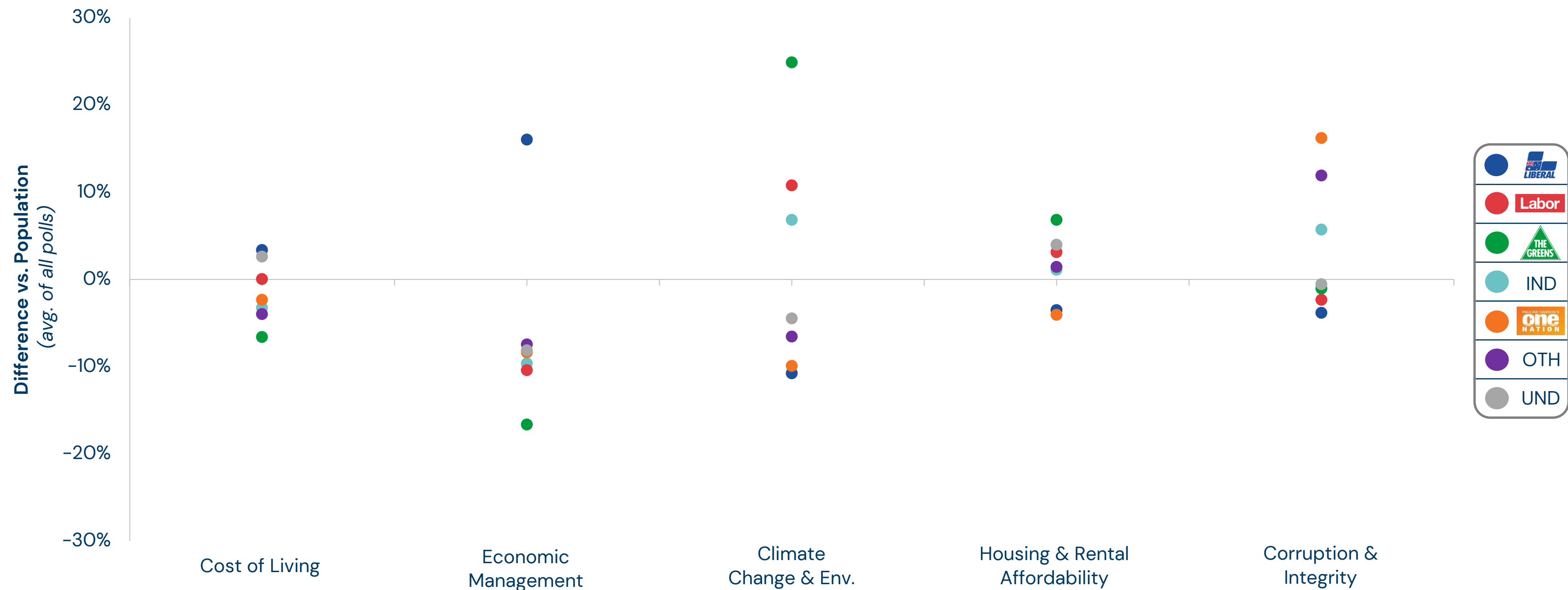
Communicating “the cost of living” vs. “economic management” to different demographics is key

Issue Importance by Age (All Polls)



Voters' top issues differ greatly based on their vote intention, though cost of living is universal

Top Issue by Vote Intention



Older people are more focused on bills and groceries, whereas for younger people housing is a priority

Cost of Living Targets by Age | Oct + Nov Panels

	Total	18-34	35-49	50-64	65+
Groceries	57%	39%	51%	66%	68%
Gas & electricity bills	52%	32%	39%	62%	72%
Housing	41%	45%	48%	41%	31%
Rents and Interest Rates	38%	40%	44%	40%	29%
Healthcare	35%	32%	33%	32%	43%
Petrol	29%	25%	24%	29%	36%
Childcare	9%	17%	14%	3%	3%
School fees	8%	19%	11%	4%	2%
Airfares	5%	10%	8%	1%	2%

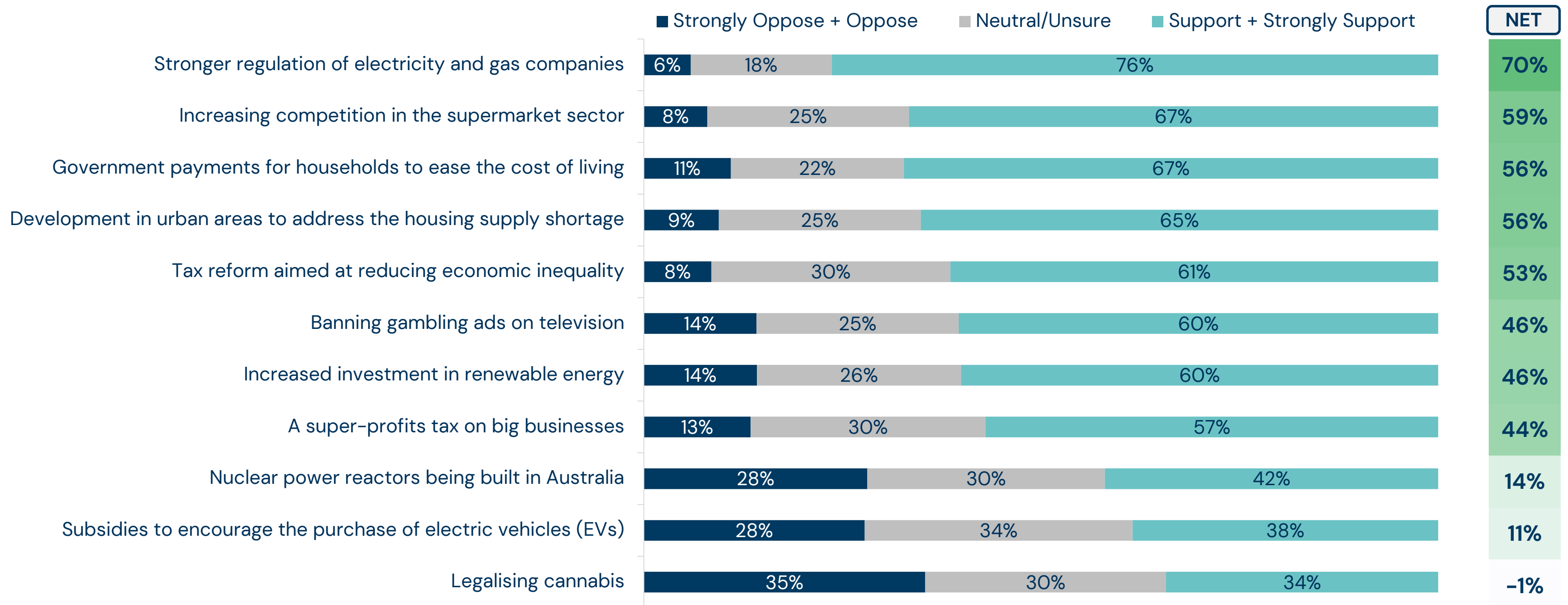
When it comes to cost of living, the differences are minor, though energy bills and groceries see some differences

Cost of Living Targets by Gender | Oct + Nov Panels

	Total	Male	Female
Groceries	57%	53%	60%
Gas & electricity bills	52%	58%	48%
Housing	41%	39%	43%
Rents and Interest Rates	38%	34%	40%
Healthcare	35%	35%	36%
Petrol	29%	32%	26%
Childcare	9%	8%	10%
School fees	8%	8%	9%
Airfares	5%	5%	5%

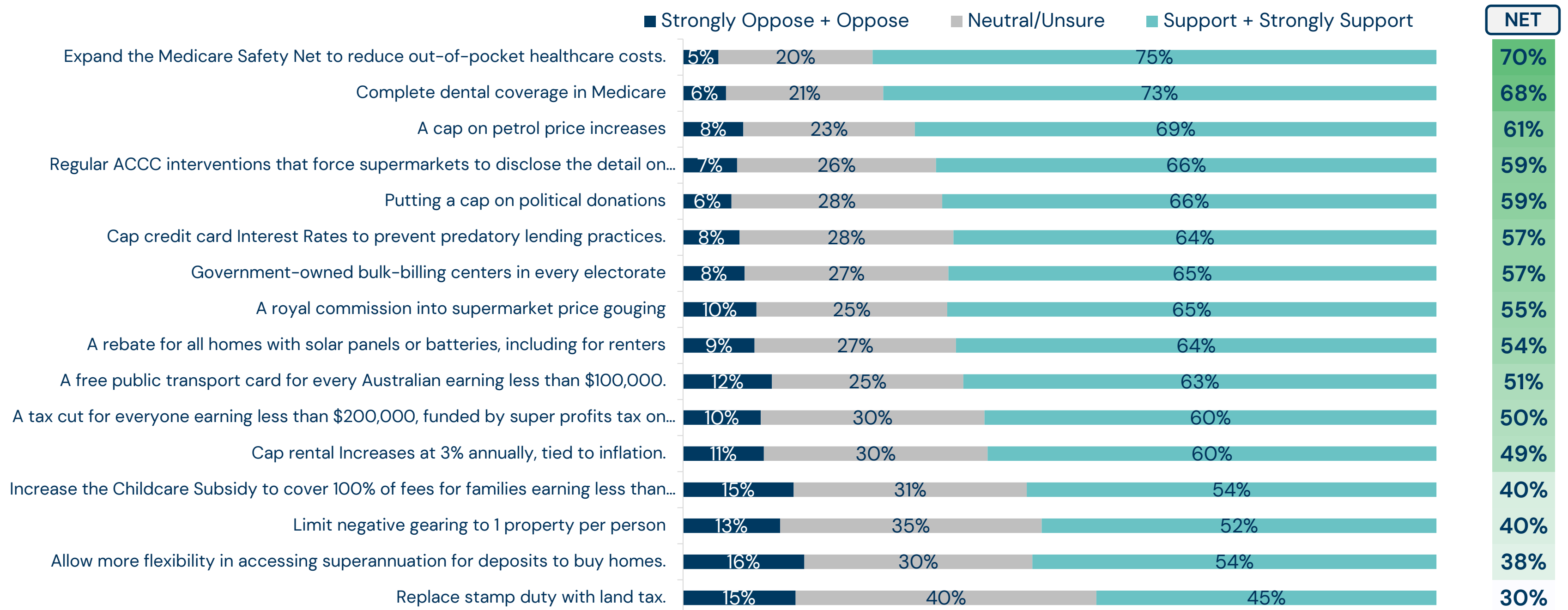
Surface-level policies around clamping down on big businesses are the most attractive to voters

Headline Policy Support | Oct Panels



Expansion of Medicare and a cap on petrol prices are low-hanging fruit when it comes to universal policies

Headline Policy Support | Nov Panels



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