

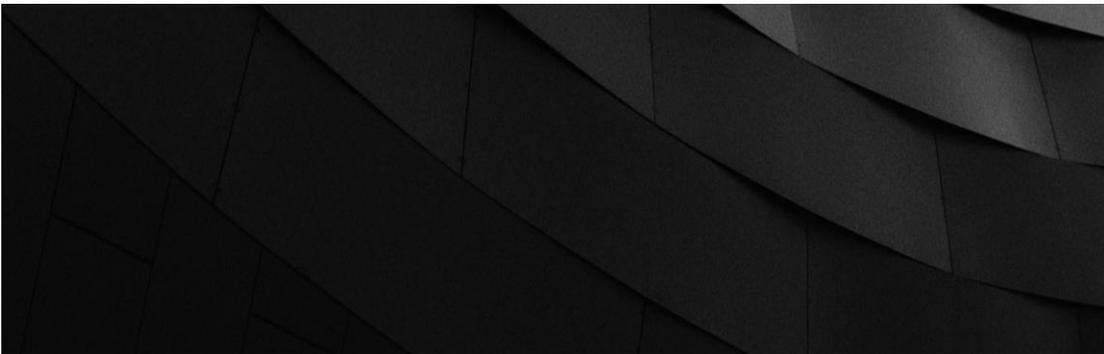


CORE|DATA

**Advisers and Politics**

QUESTIONNAIRE DRAFT

SEPTEMBER 2023



## SAMPLE AND METHODOLOGY

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### TARGET RESPONDENT:

- Respondents must be 18 years old or above.
- Must have a financial adviser

### QUOTAS:

- N=300 completes
- Age and gender quotas
- Age: 3 brackets, 18 to 39, 40 to 59, 60+
- Gender: Approximately 50% Male, 50% Female, Others to fall out naturally
- State to fallout naturally

### METHODOLOGY:

- Data will be captured via an online survey respondents will be invited to complete.
- The survey may be completed on a range of devices including mobile phones, tablets, and PC/Laptops.
- The average survey length must not exceed 8 minutes
- Respondents will be incentivised for their time in accordance with the practices of the panel they have been sourced from.

### SAMPLE SOURCE:

- CoreData's proprietary panel, supplemented with our panel partners

## SCREENERS

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### PREAMBLE:

The survey will capture your views on the landscape of Australia.

In appreciation of your time, you will receive TEN (10) entries into a prize draw for a chance to win one \$5,000 quarterly prize or one of ten \$100 monthly gift card prizes.

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The survey takes an average of 8 mins to complete, depending on your responses.

Please note that the survey will timeout after 25 minutes of inactivity. Ensure that you are still actively clicking on the pages at least every 20 minutes to avoid termination of your session. Click the START button to begin.

If you have any questions about the survey procedures, feel free to email us at [support@coredata.com.au](mailto:support@coredata.com.au) (mailto:support@coredata.com.au). This survey is best answered using Google Chrome, Mozilla Firefox or Safari.

Click here (<https://www.coredata.com.au/blog/coredata-prize-draw-terms-conditions/>) for terms and conditions.

CoreData strictly adheres to the AMSRS Code of Professional Behaviour in relation to research confidentiality and data security. This means that responses are strictly confidential and anonymous. By proceeding to complete the survey, you are providing your informed consent to participate. Click here (<https://study.coredataresearch.com/downloads/coredata-confidentiality-and-data-security.pdf>) for CoreData's privacy policy for further details.

**S1. How old are you?**

ASK ALL

NUMERIC ENTRY

SCREENOUT: IF UNDER 18

**S2. Are you...?**

ASK ALL

SINGLE RESPONSE

01	Male
02	Female
03	Non-binary
04	Prefer to self-describe: Please specify

**S3. Please enter your residential postcode.**

ASK ALL

NUMERIC ENTRY

AUTOCODE TO STATE

**S4. Which of the following best describes you?**

01	Australian citizen
02	Permanent-resident
03	Working or student visa
04	Other: Please specify

**S5. Which of the following services have you used in the past 12 months?**

ASK ALL

RANDOMIZE

MULTI RESPONSE

01	Financial adviser
02	Insurance broker
03	Mortgage broker
04	Mechanic
05	Lawyers
06	Personal trainer
07	Event planner
08	Dentist
09	Plumber
99	None of the above

S6. Which of the following best describes your relationship with your financial adviser?

ASK IF S5=1

SINGLE RESPONSE

01	I have an ongoing relationship with a financial adviser
02	I've only engaged with my adviser once but plan to keep doing so
03	I don't have a dedicated financial adviser but use them from time to time
04	I have ended my relationship with my adviser over the past 3 months
05	I used to have an adviser (more than 3 months ago) but not now
99	I do not have a relationship with a financial adviser

SCREENOUT IF S4 NOT = 1 (Not Australian citizen) OR S6 NOT = 1 OR 2 (No relationship with adviser)

# MAIN QUESTIONS

Thanks for that. We'd now like to ask a few more questions about your relationship with your financial adviser.

**A1. Approximately how long have you been working with your financial adviser?**

ASK IF S6=1

NUMERIC RESPONSE

01	Less than a year
02	1 to under 3 years
03	3 to under 5 years
04	5 to under 10 years
05	More than 10 years

**A2. Thinking about your conversations with your financial adviser, how often would you say you discuss the following topics?**

RANDOMIZE

SINGLE RESPONSE

		Never (1)	Rarely (2)	Someti mes (3)	Often (4)	Always (5)
01	Impact of government policies on you and your portfolio					
02	Wealth-transfer to the next generation					
03	Cryptocurrency					
04	Socially-responsible investments					
05	Impact of global events on you and your portfolio					

**A3. And how important or unimportant do you think it is for your financial adviser to discuss the following topics with you?**

SINGLE RESPONSE

		Not at all important (1)	(2)	(3)	Neutral (4)	(5)	(6)	Extrem ely import ant (7)
01	Impact of government policies on you and your portfolio							
02	Wealth-transfer to the next generation							
03	Cryptocurrency							
04	Socially-responsible investments							
05	Impact of global events on you and your portfolio							

## CORE DATA

**A4. Which of the following would you say best describes your interest and engagement with politics in general?**

**SINGLE RESPONSE**

		Extremely disengaged (1)	(2)	(3)	Neutral (4)	(5)	(6)	Extremely engaged (7)
01	Local or state politics							
02	Federal politics							
03	International politics							

**A5. To what extent would you value the following as sources of information about politics?**

**SINGLE RESPONSE**

		Not at all (1)	(2)	(3)	(4)	(5)	(6)	Highly valued (7)
01	Financial adviser							
02	Family							
03	Friends							
04	News websites							
05	Social media							

**A6. Do you have anything else to add about your financial adviser discussing politics with you?**

**OPEN TEXT**

Thank you for your time.

## CORE DATA



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