

State of the Nation

Australia's Changing Demographics

Presented at the ACCORD
Cosmetic and Personal Care Conference 2010

by *Michele Levine*
CEO Roy Morgan Research

September 30, 2010

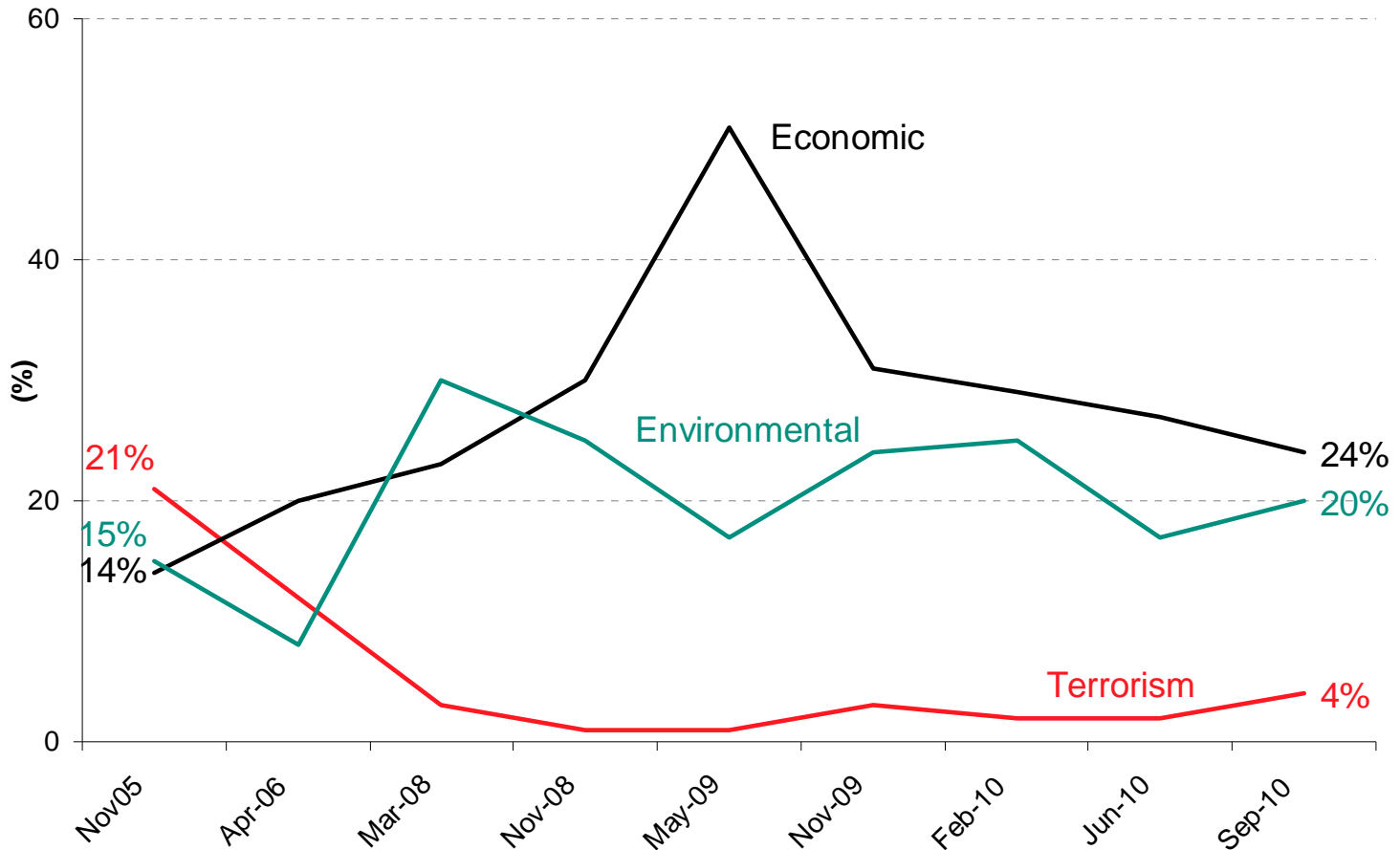
[Click here to watch a streaming Video of the Presentation](#)

What worries you about a Prime Minister?

- A PM who is a woman **6%**
- A PM who doesn't believe in God **22%**
- Not married, living in defacto relationship **15%**
- A Catholic Prime Minister **9%**
- Prime Minister who has conservative values in relation to such things as abortion and stem cell research **43%**

Issues Facing the World and Australia

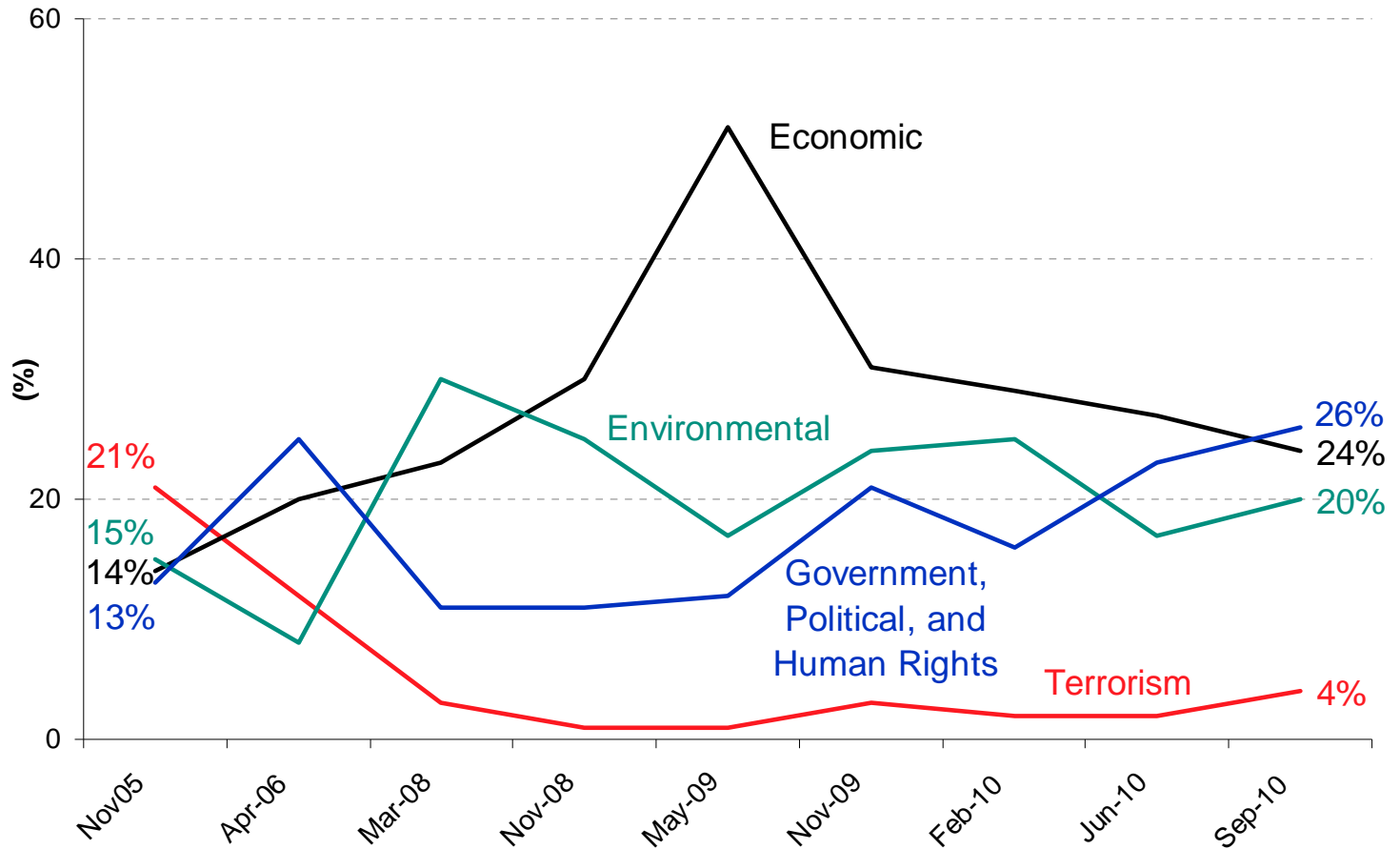
Most Important Issues Facing Australia



Source: Roy Morgan Research

*Roy Morgan Nationwide telephone poll (n=649) September 15/16, 2010; Aust. Population 14+

Most Important Issues Facing Australia



Source: Roy Morgan Research

*Roy Morgan Nationwide telephone poll (n=649) September 15/16, 2010; Aust. Population 14+

Key Areas of Change

Society

Technology

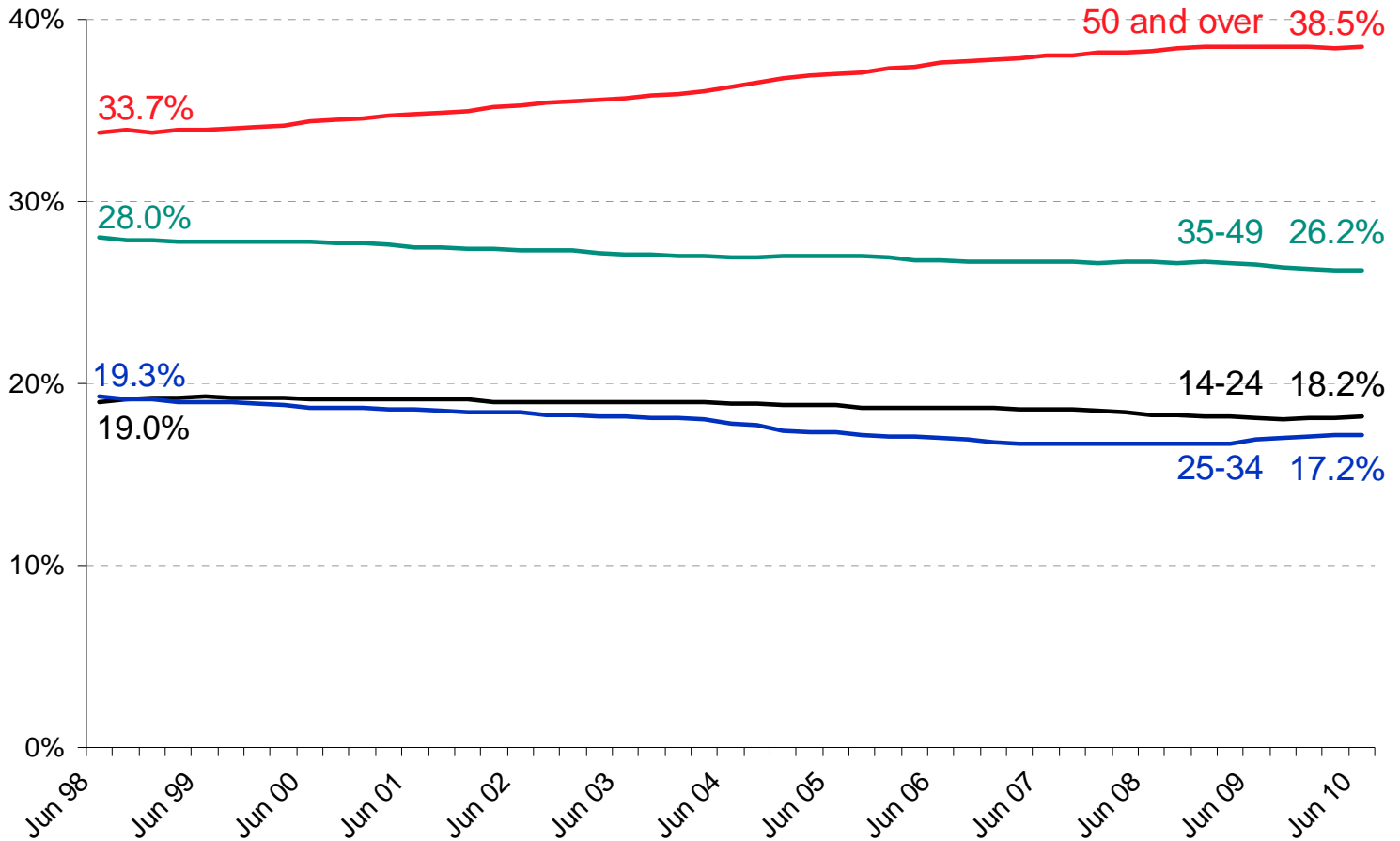
Economy

Political

Environment

SOCIETY

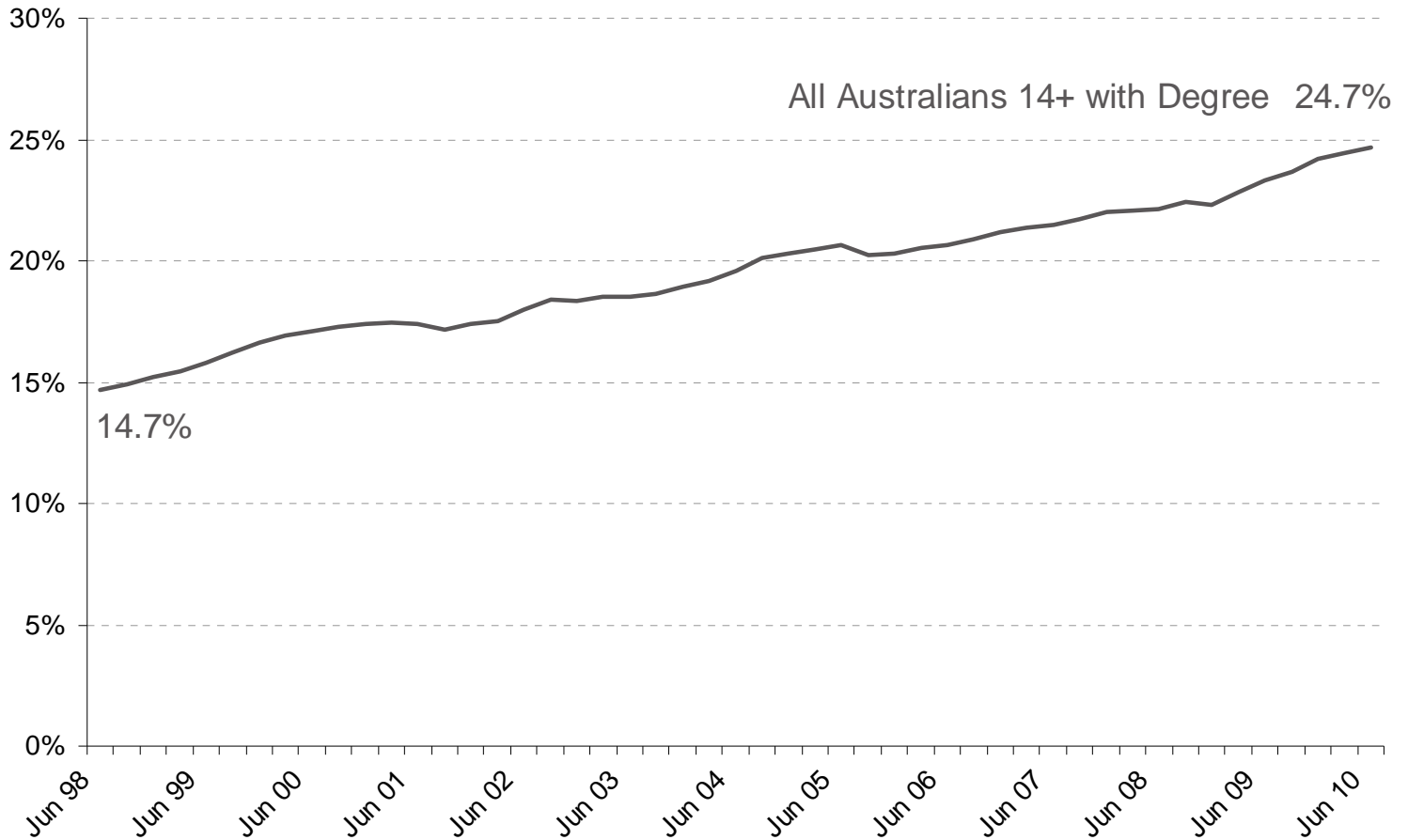
% in Each Age Group



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

SOCIETY

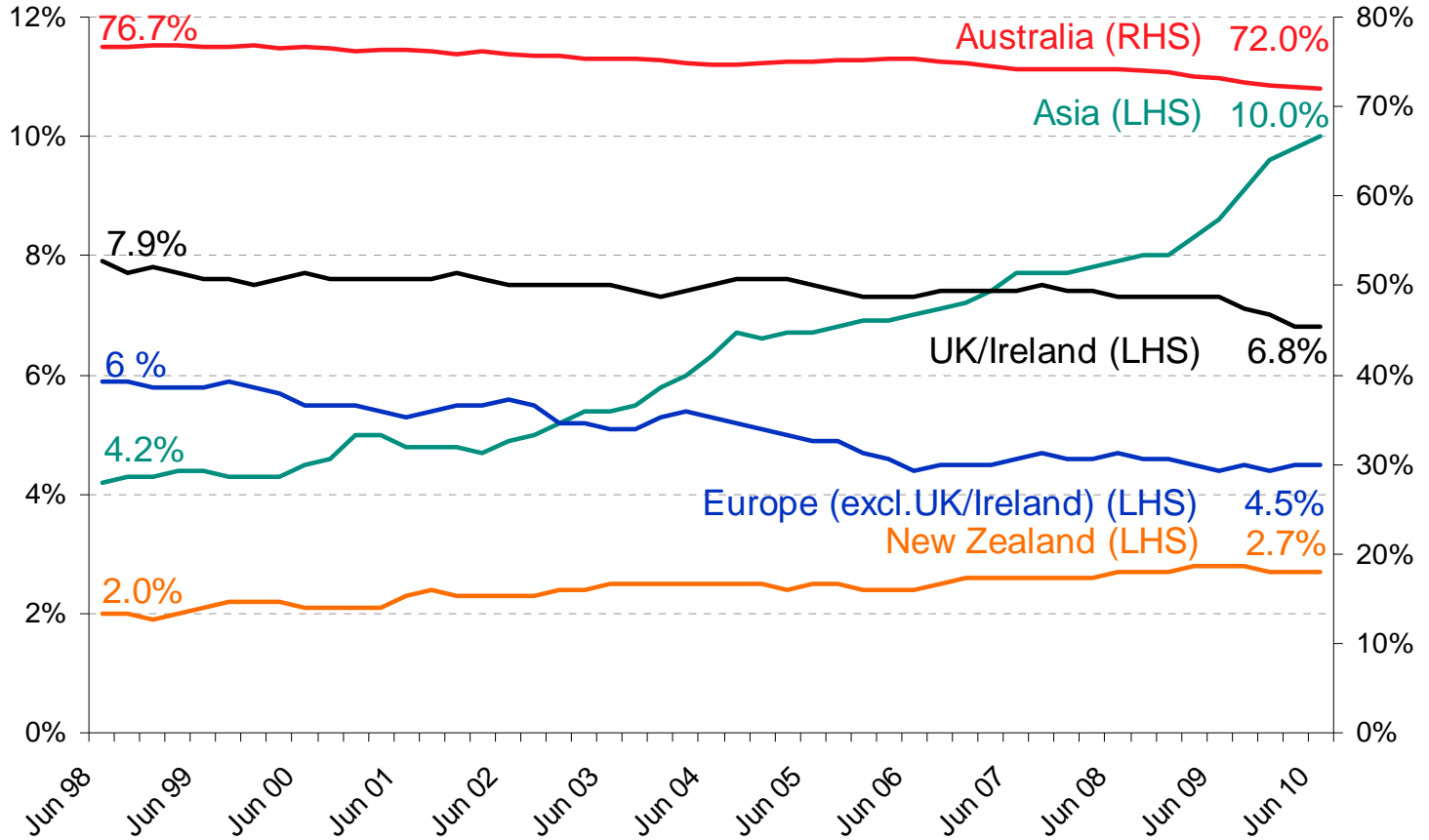
% with a Degree



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

SOCIETY

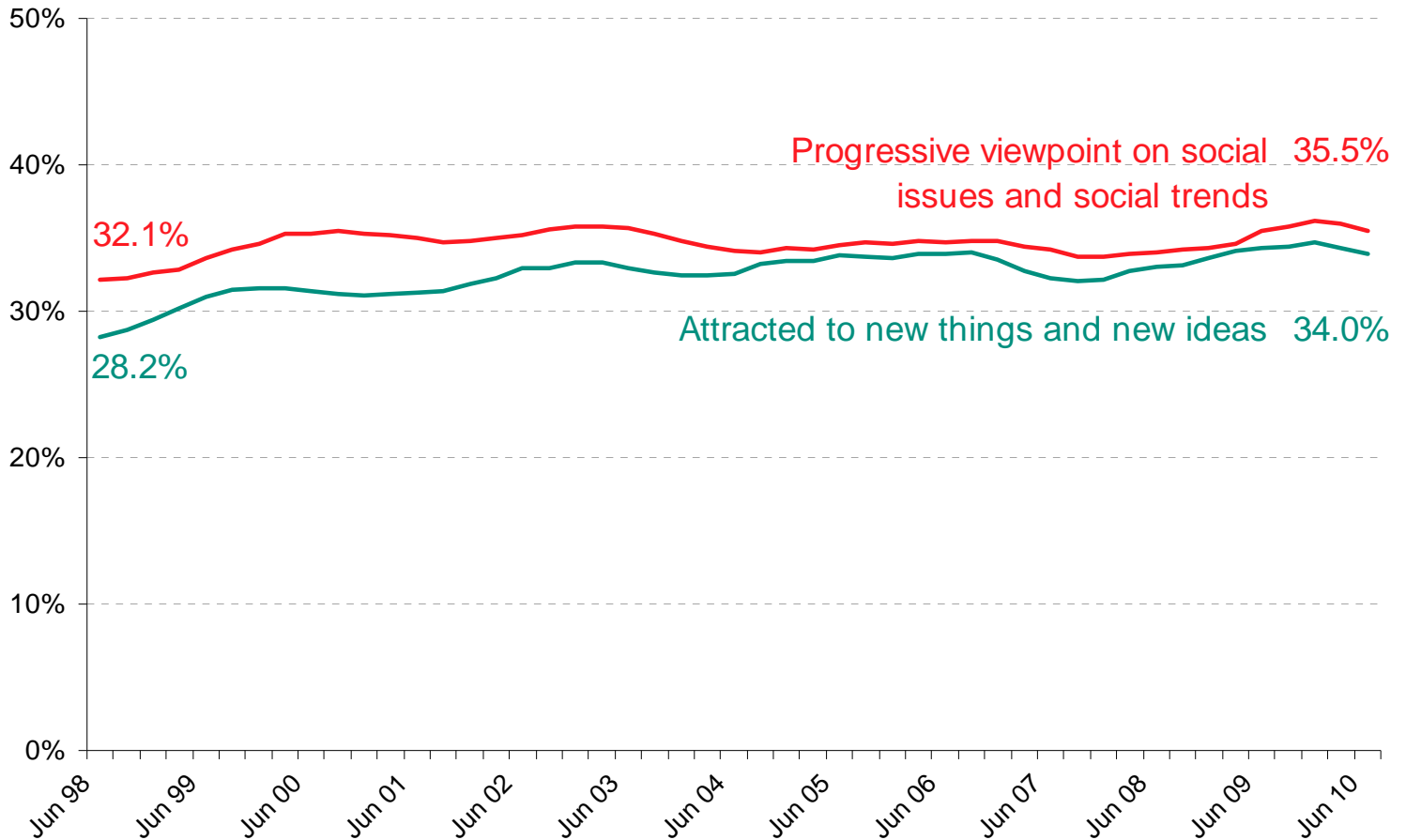
Country of Birth



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

SOCIETY

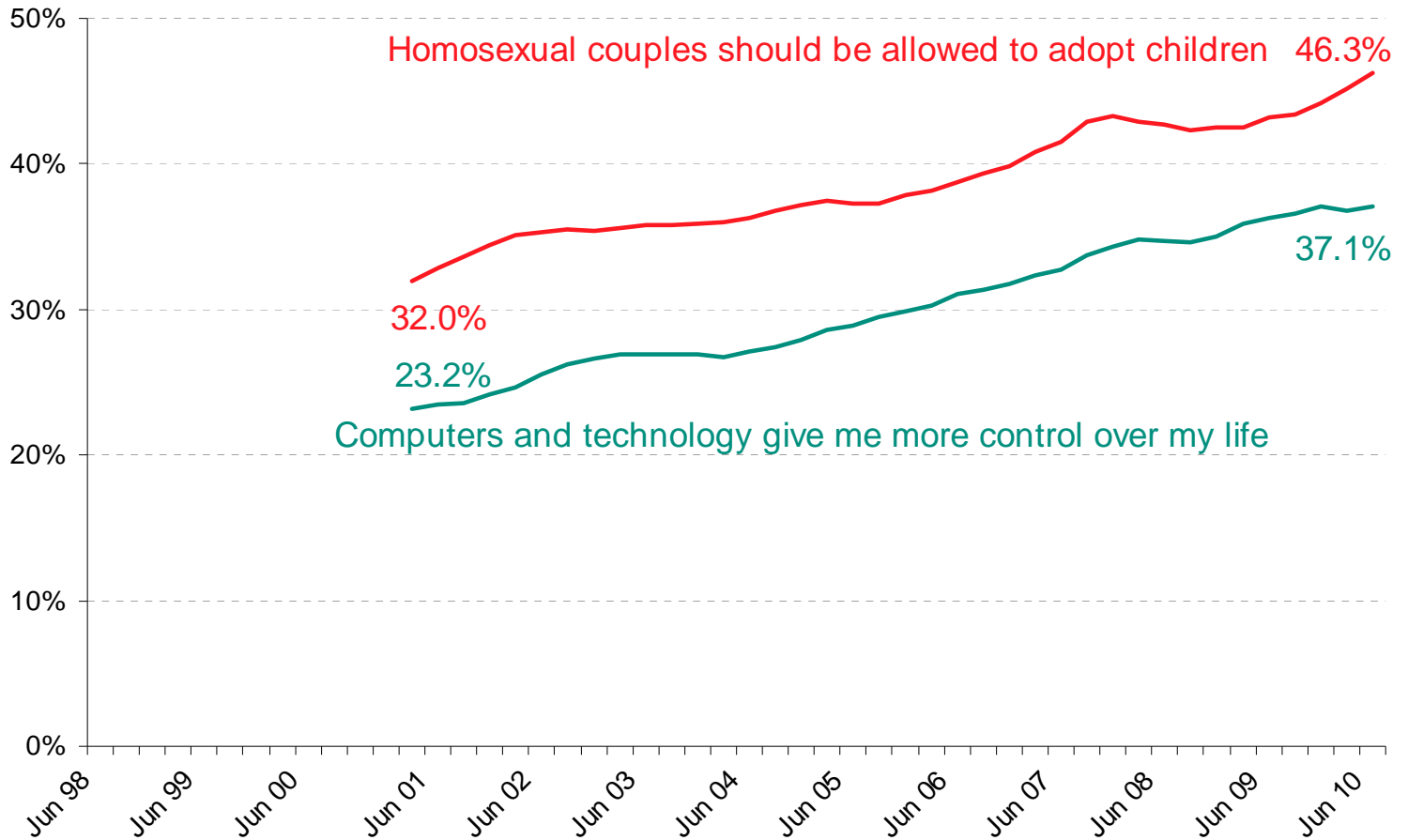
% Consider themselves Progressive and Attracted to New Things and New Ideas



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

SOCIETY

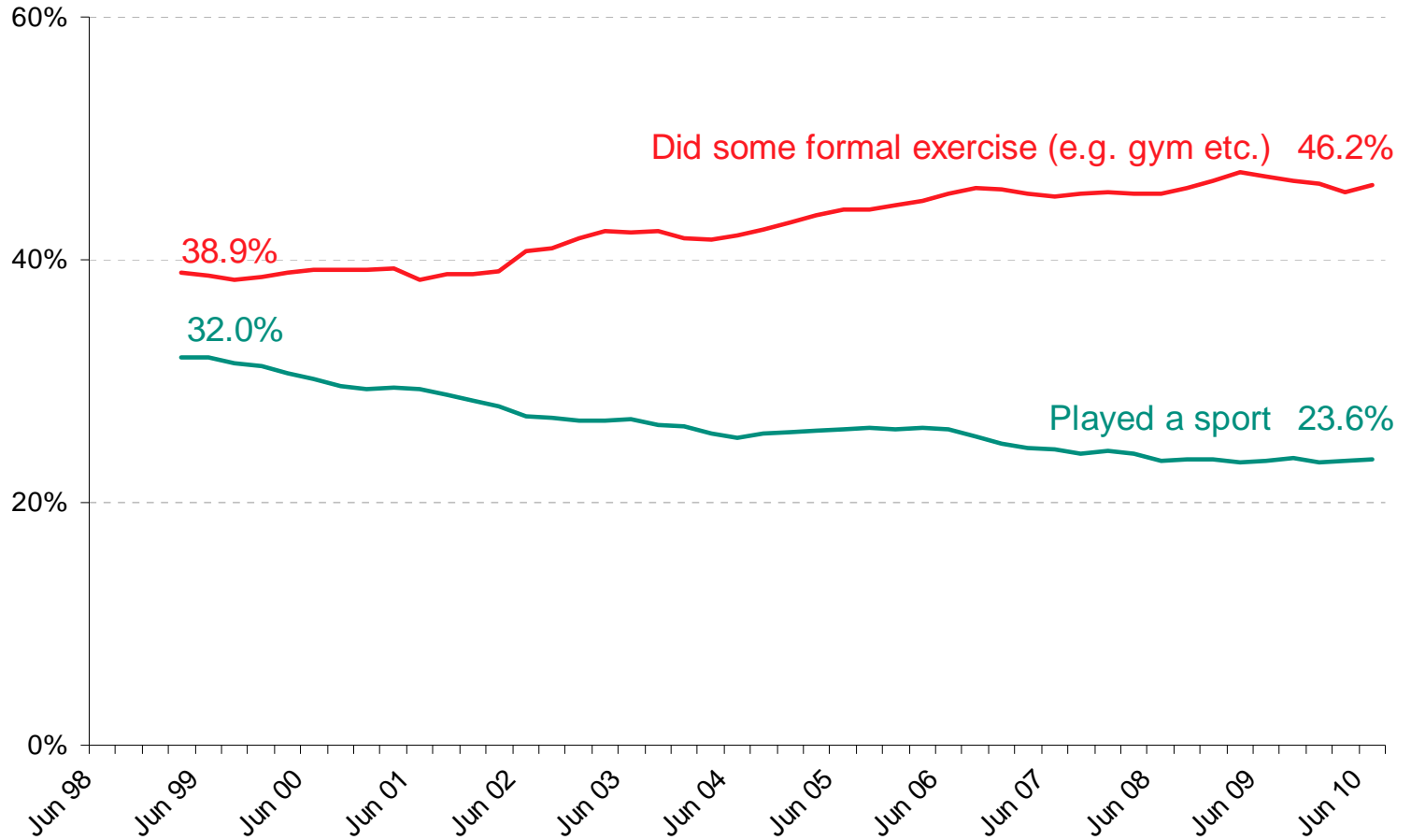
Progressive Attitudes



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

SOCIETY

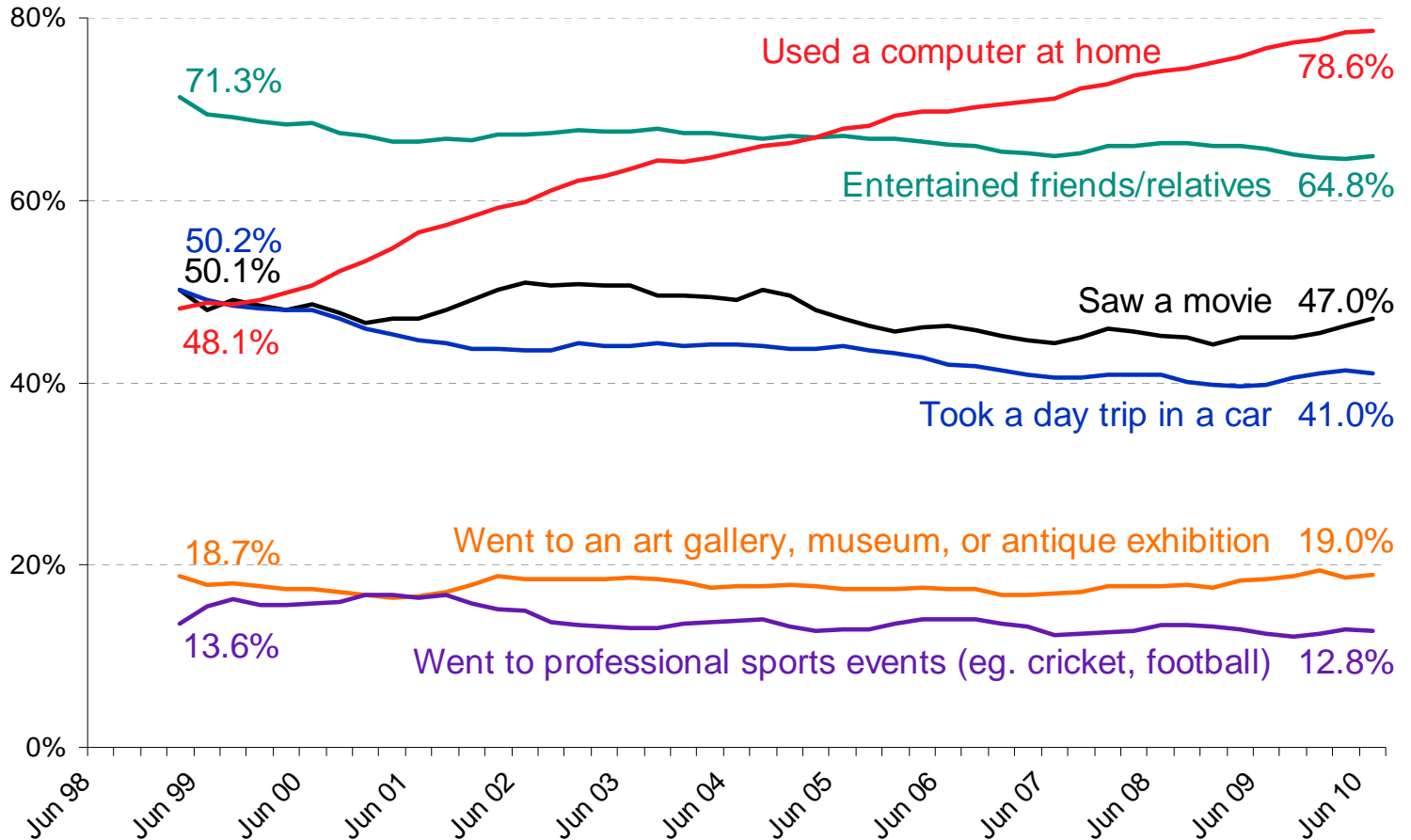
% Participate Sport/Exercise



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

SOCIETY

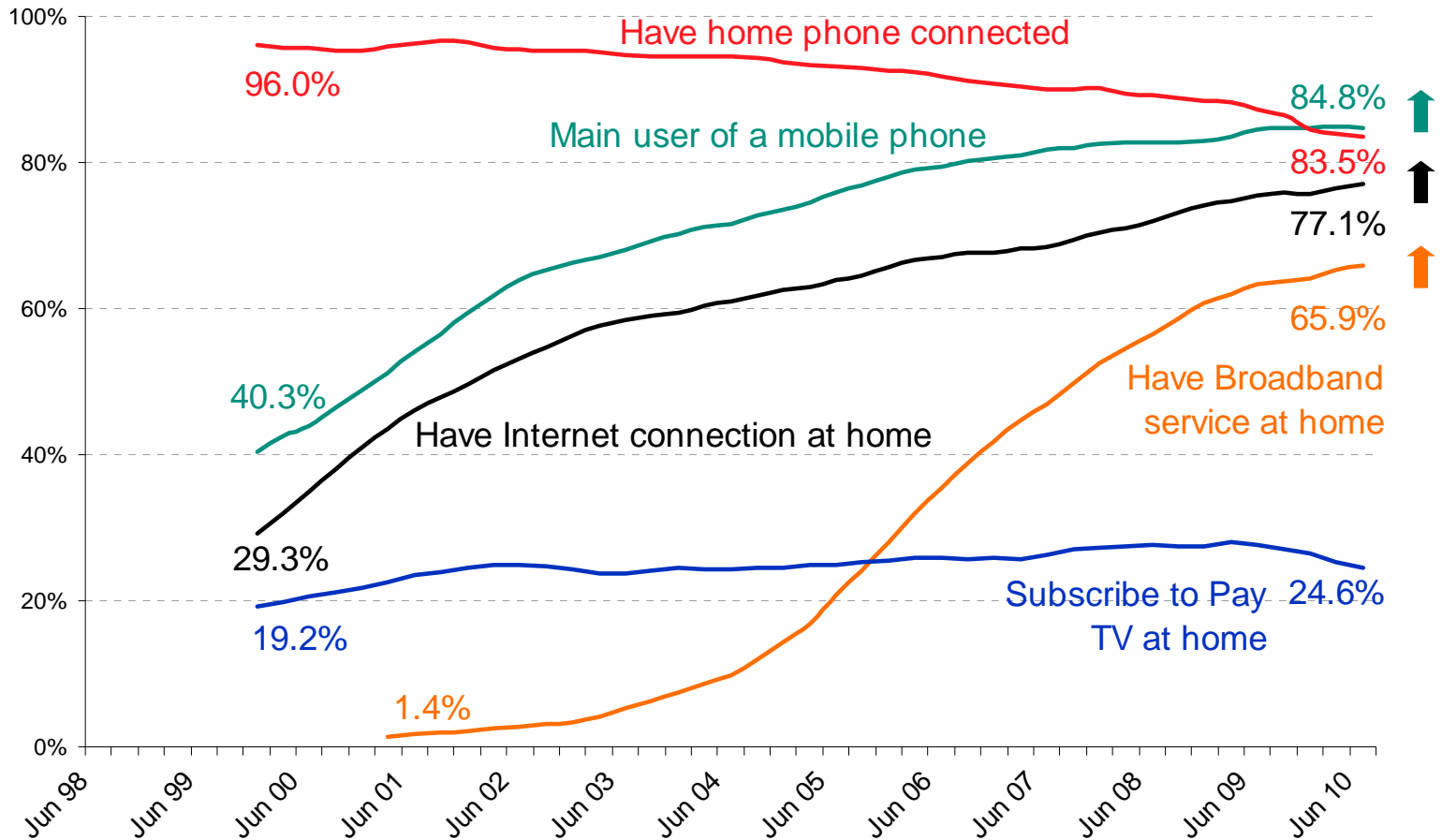
% Participating in Other Leisure Activities



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

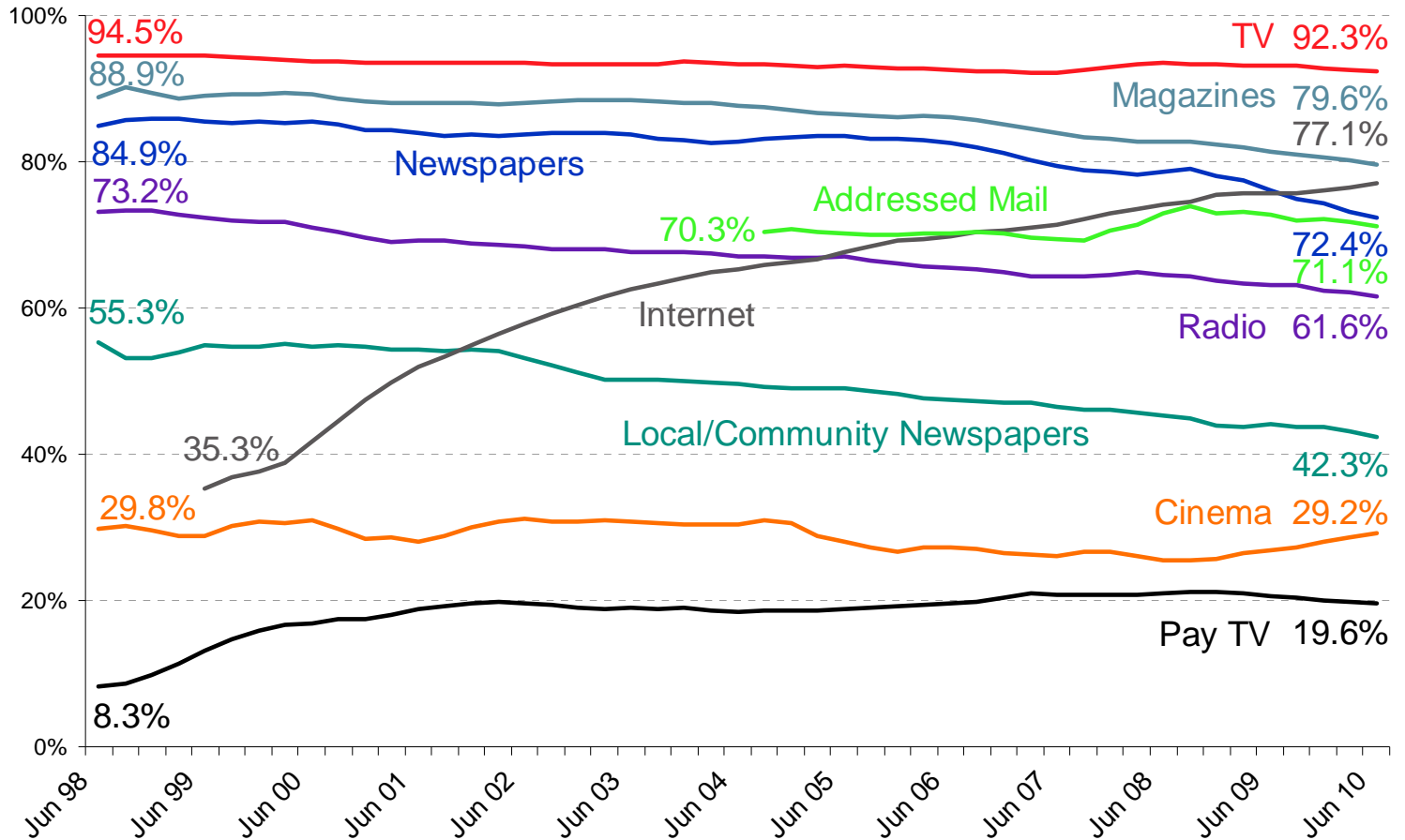
% with Major Types of Telecommunications



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

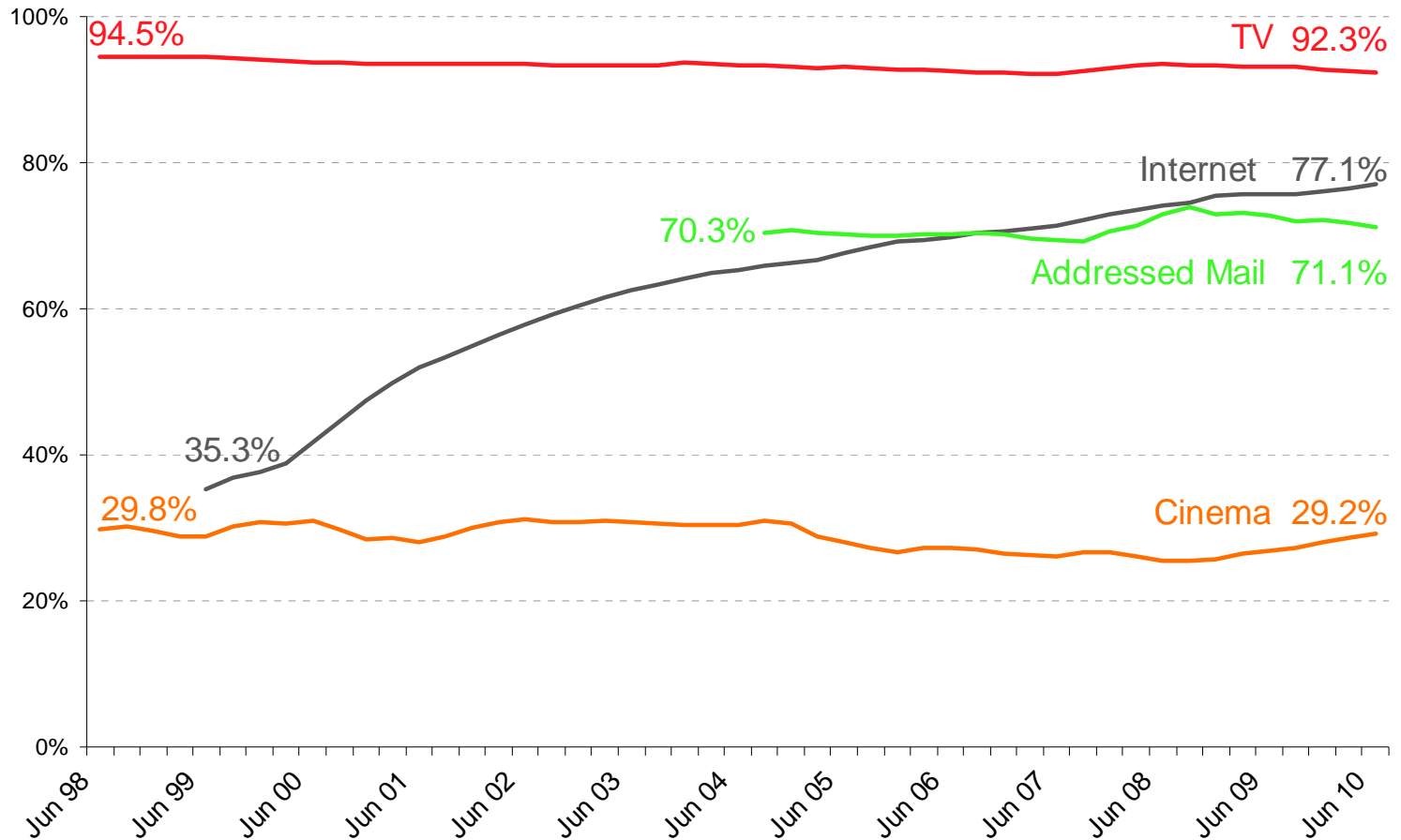
% using Major Media Types



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

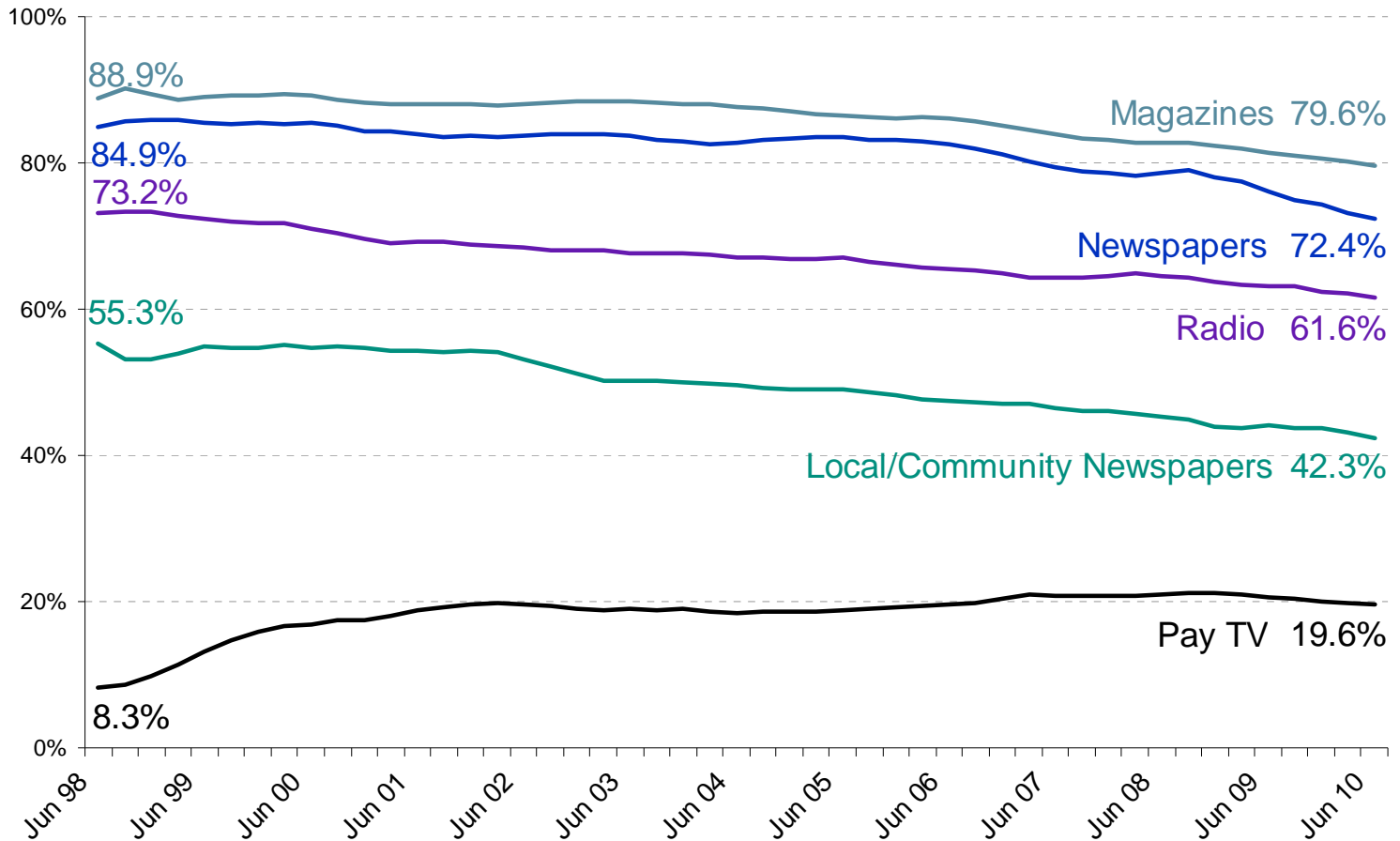
% using Major Media Types - Increasing/Remaining Steady



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

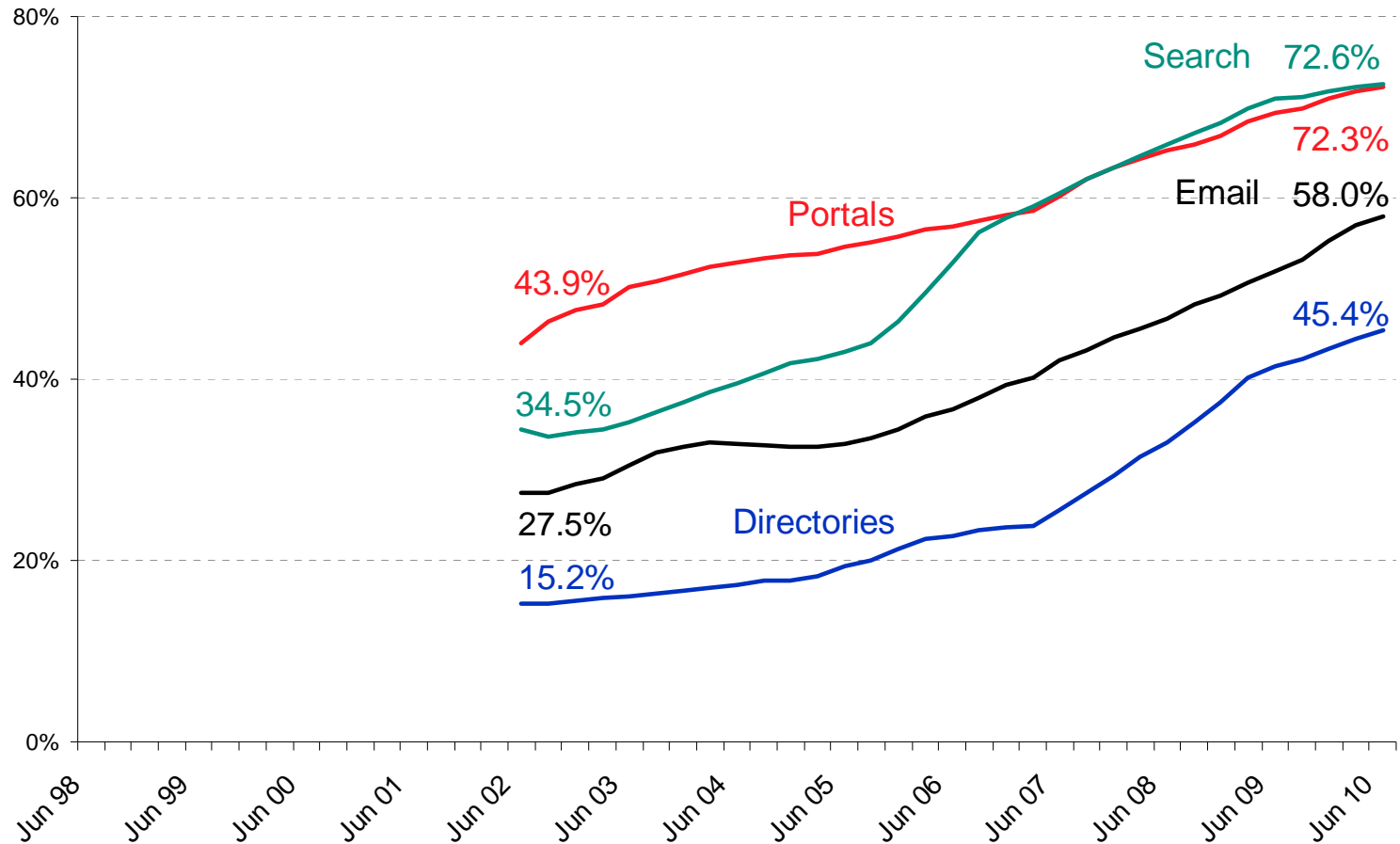
% using Major Media Types- Declining



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

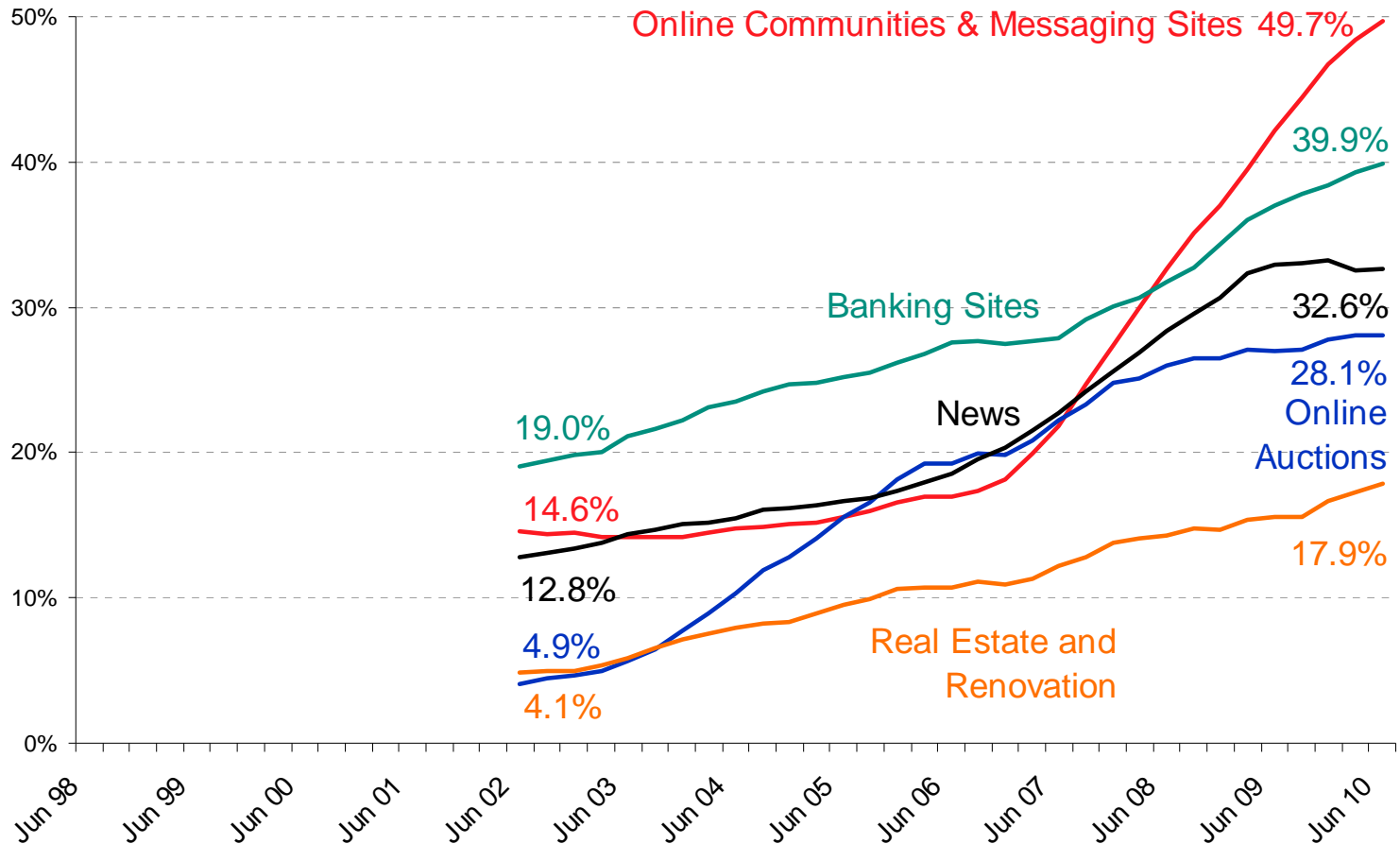
% Visited Traditional Website in Last 4 Weeks



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

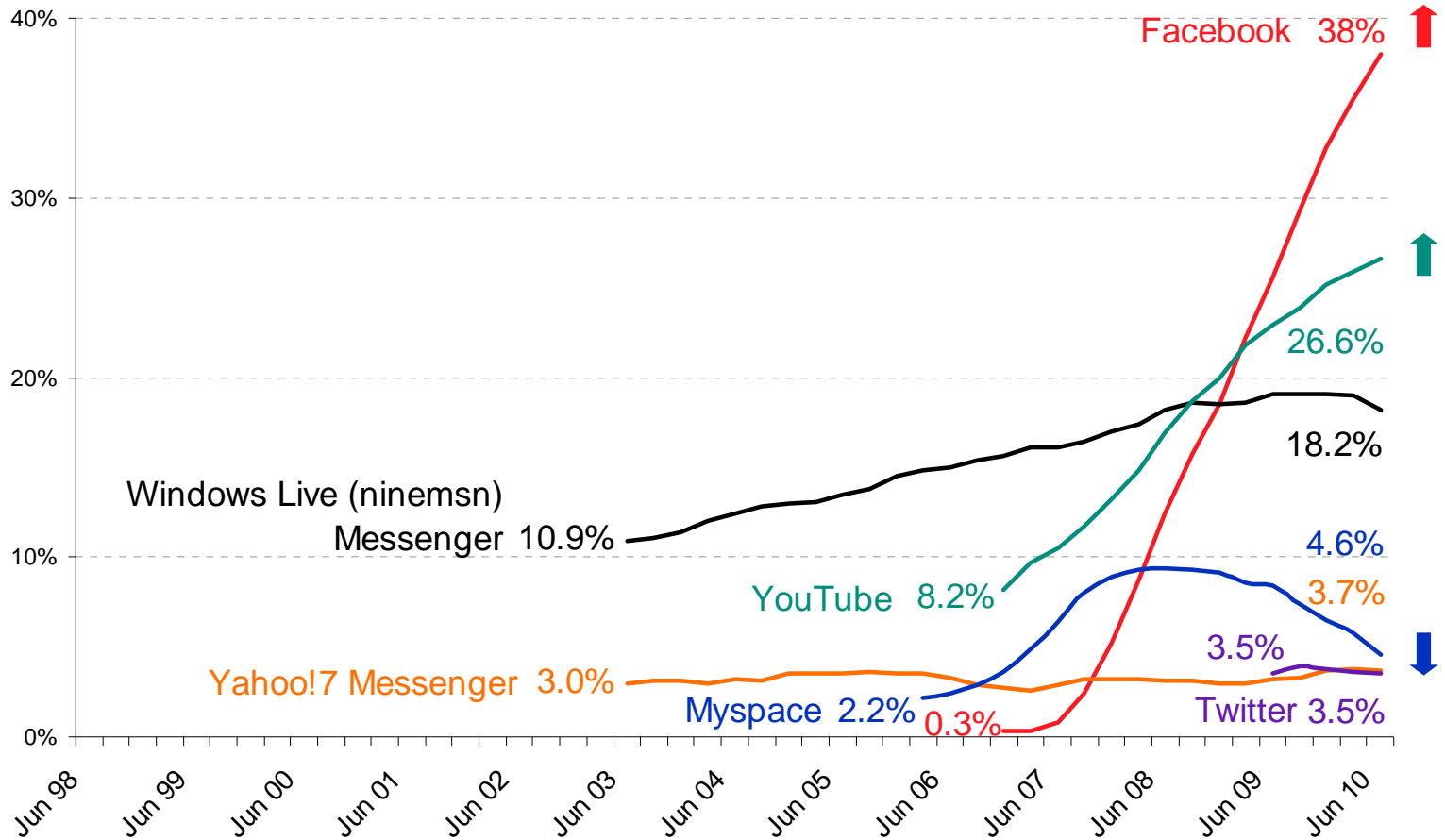
% Visited Commercial and Community Website in Last 4 Weeks



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

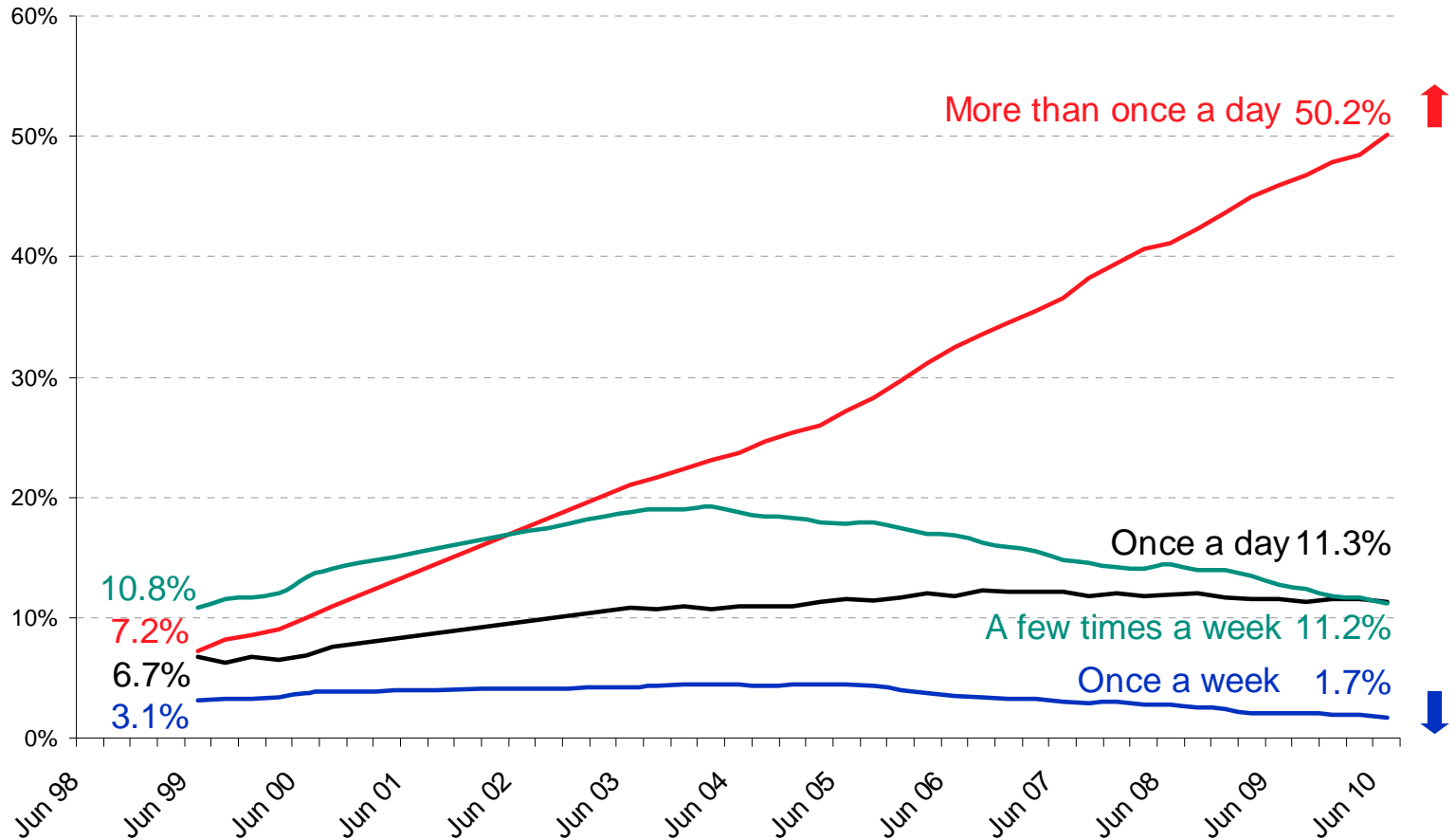
% Visited Online Community or Messaging Website in Last 4 Weeks



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

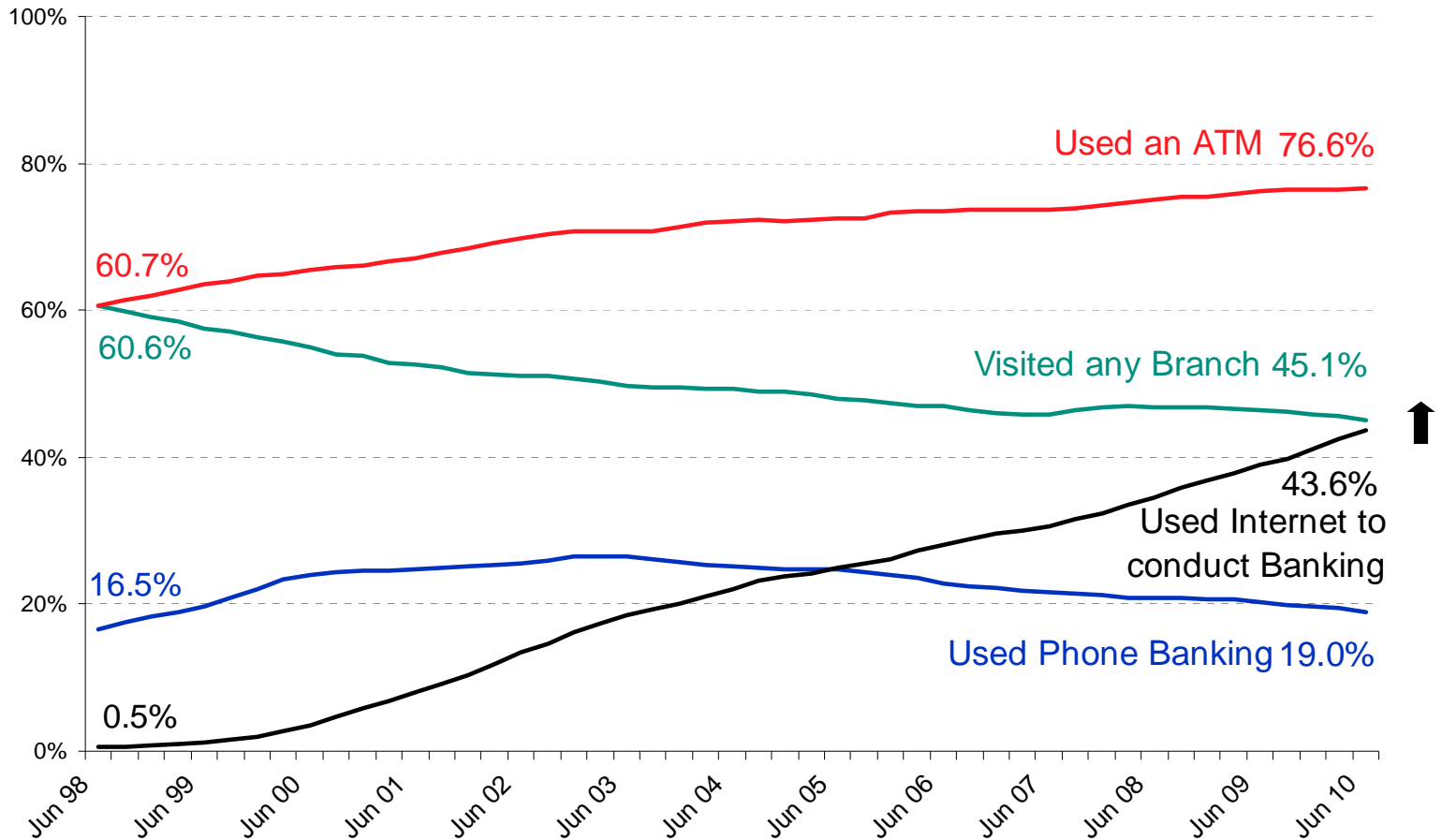
% Internet Use Frequency



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

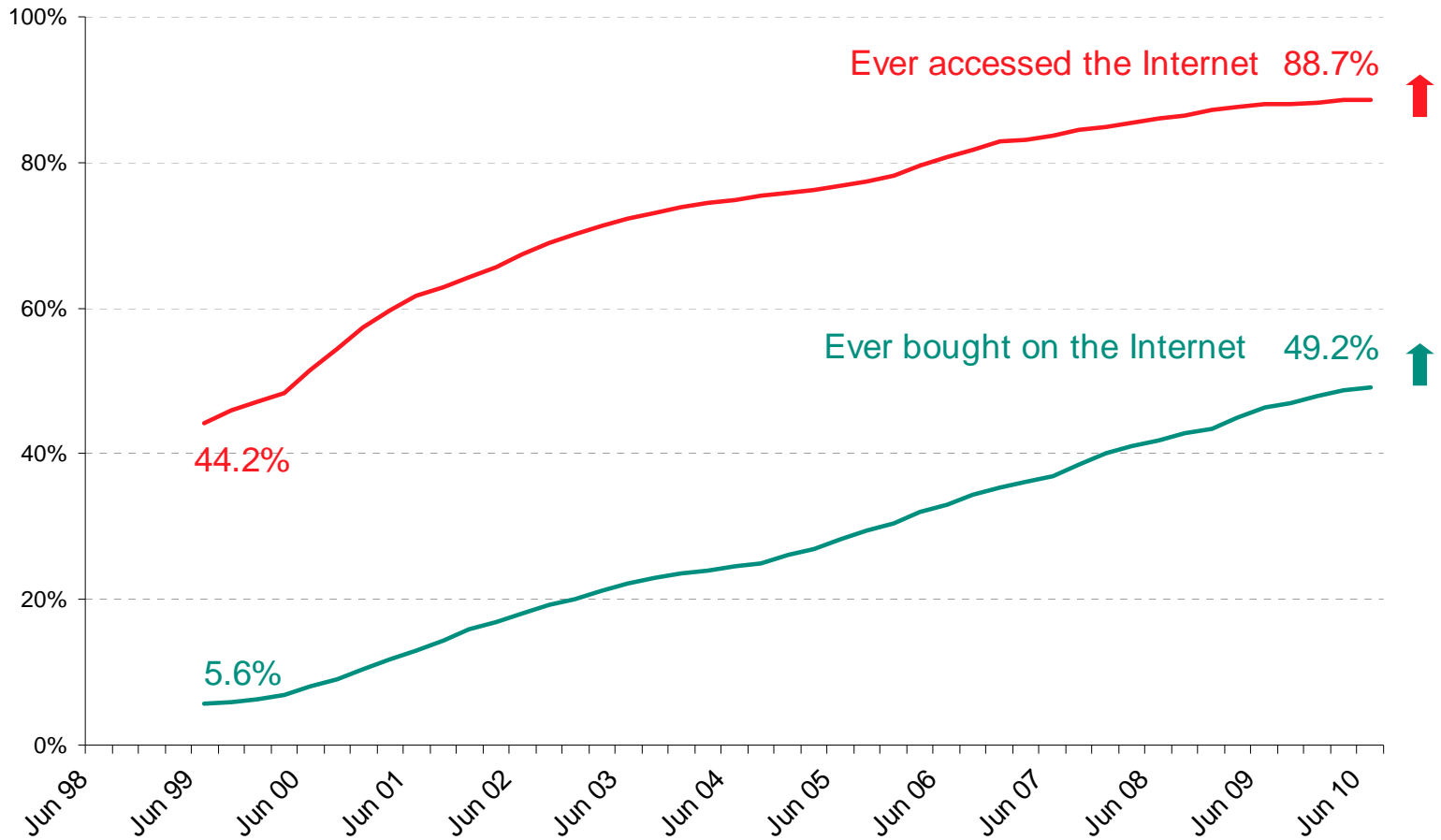
% Using Major Banking Channels in the Last 4 Weeks



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

TECHNOLOGY

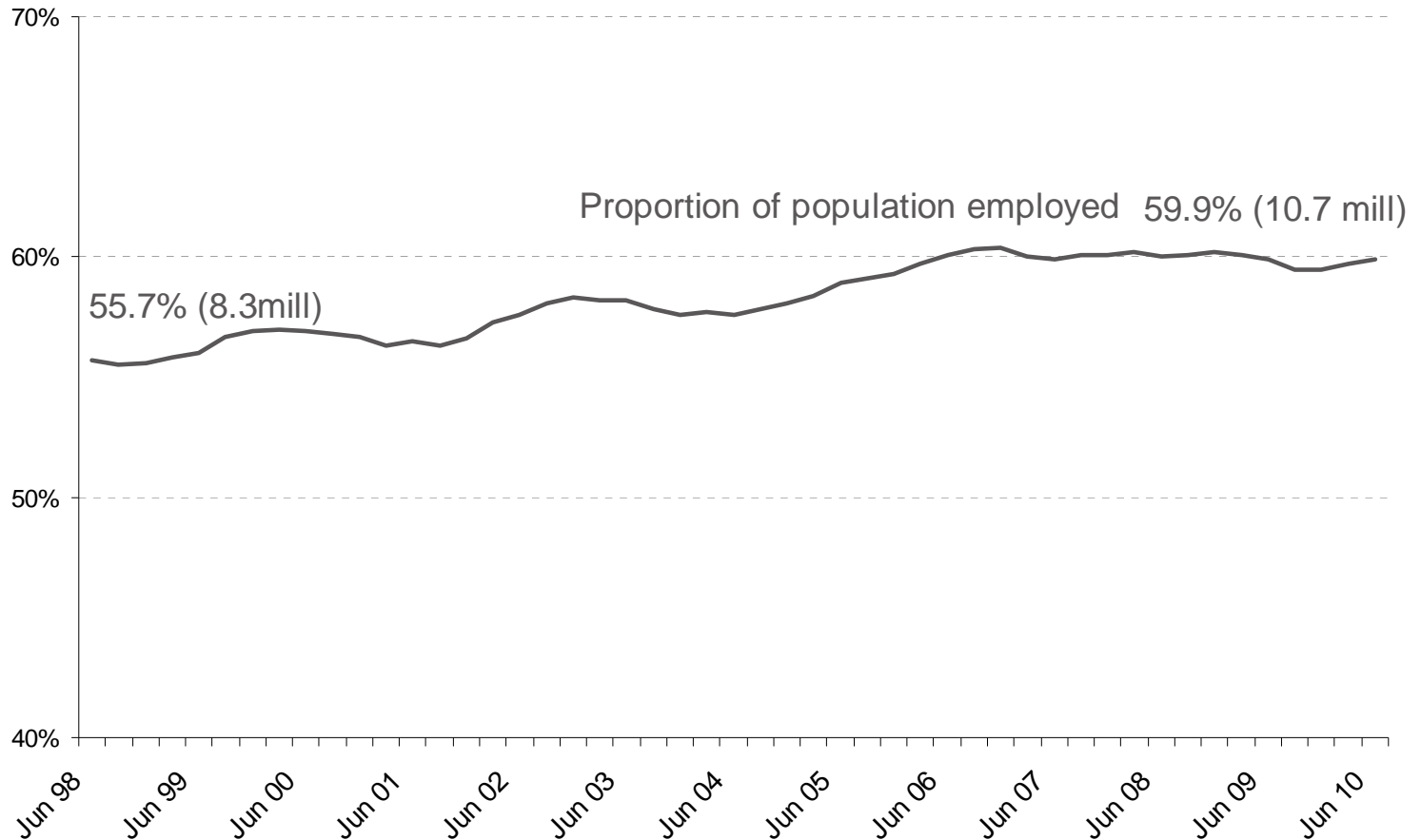
% Used or Purchased on the Internet



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average

ECONOMY

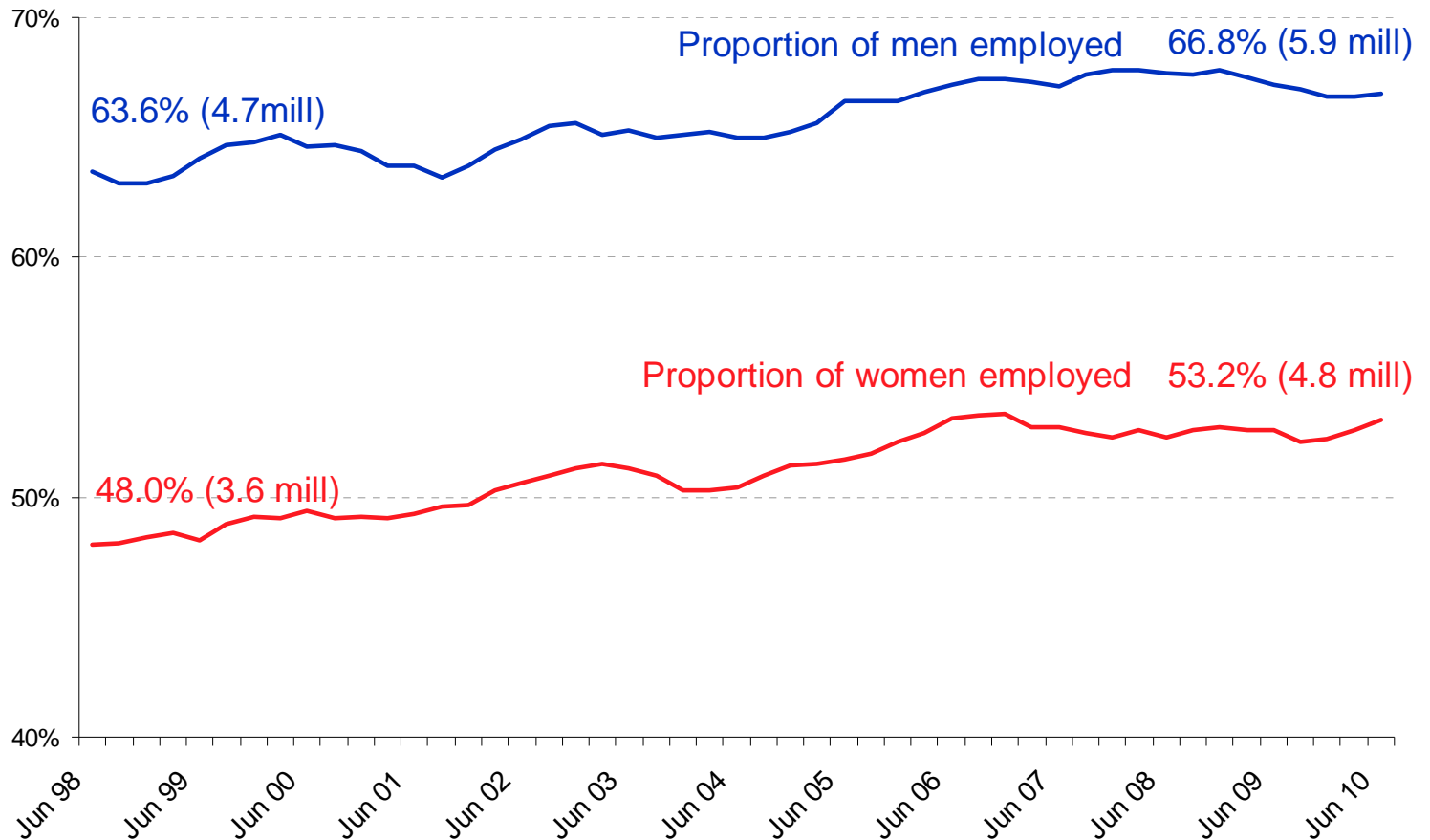
% of people in Employment



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

ECONOMY

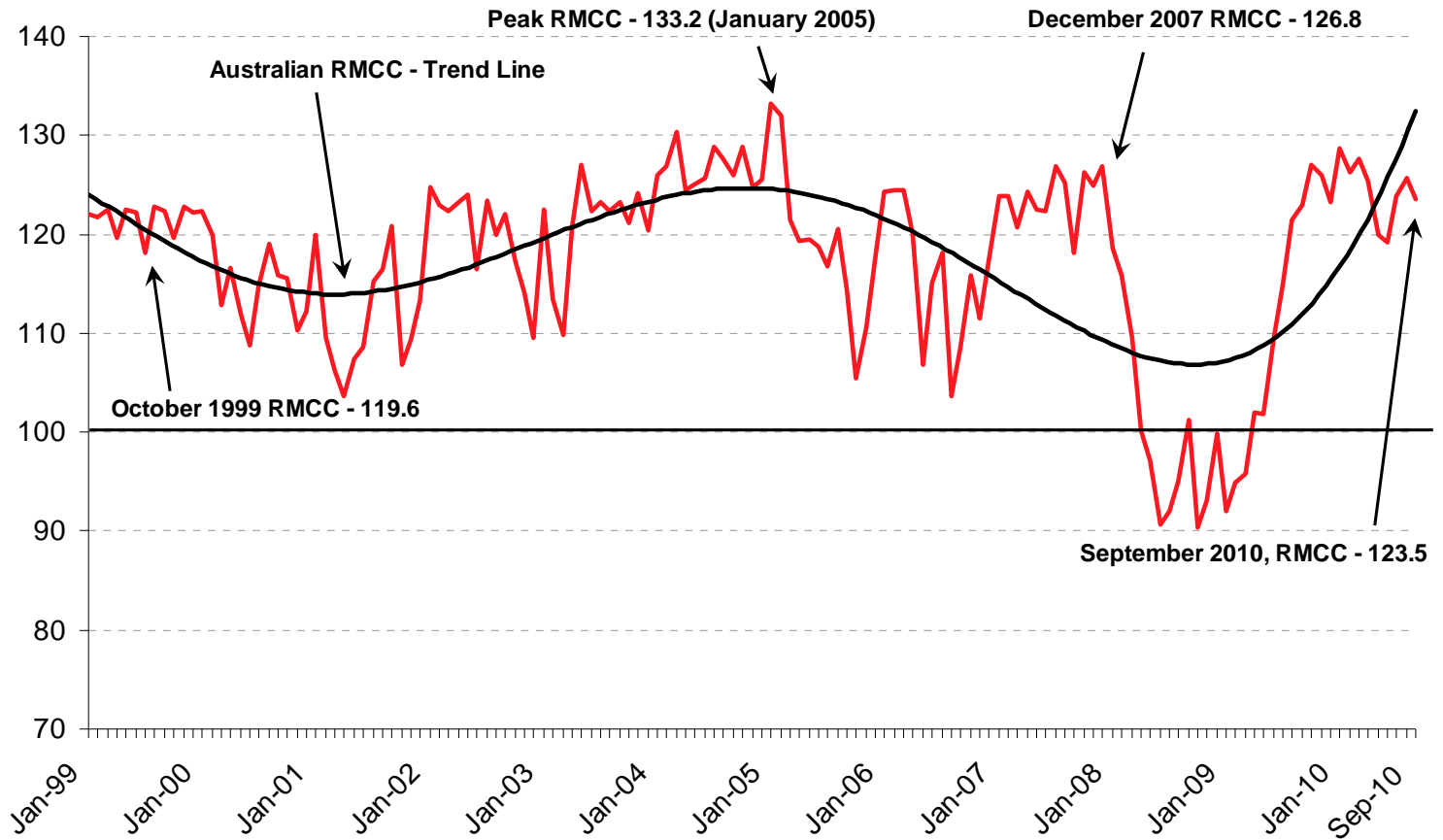
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Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

ECONOMY

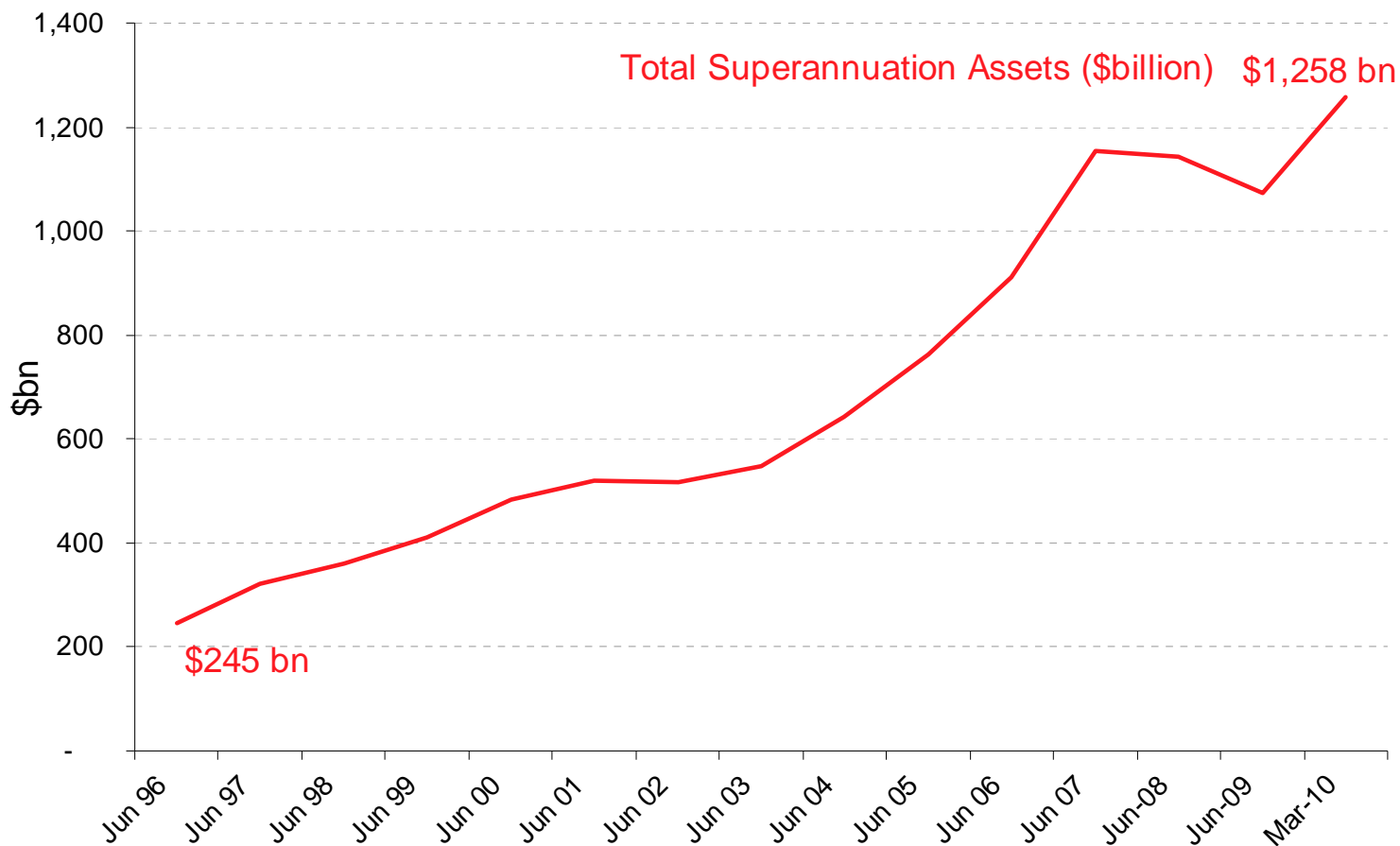
Roy Morgan Consumer Confidence – Long Term Trend



Base Aust Population aged 14+; Source: Roy Morgan Research.

ECONOMY

Total Superannuation Assets

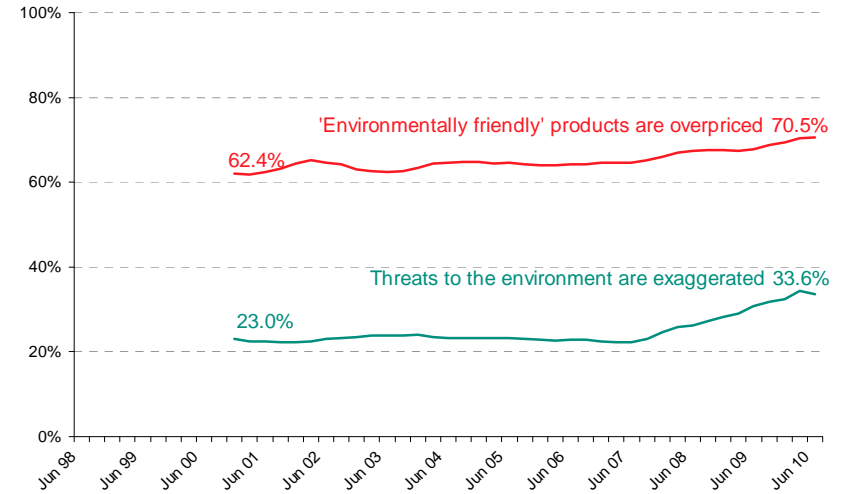
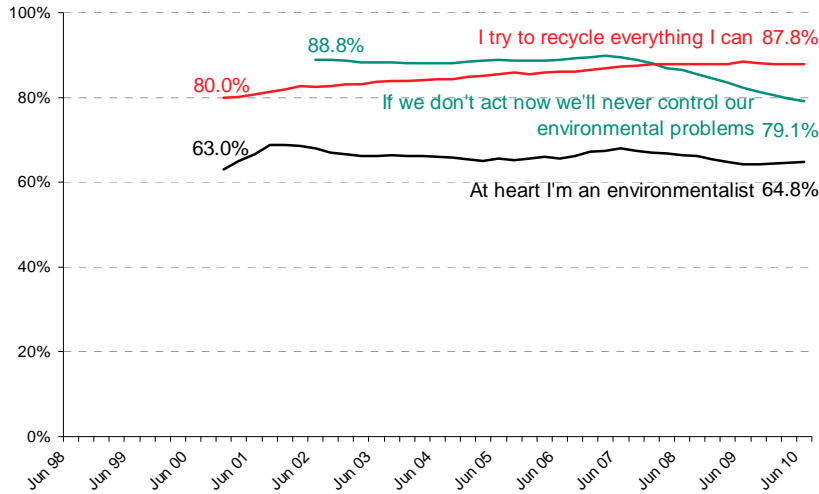


Source: APRA

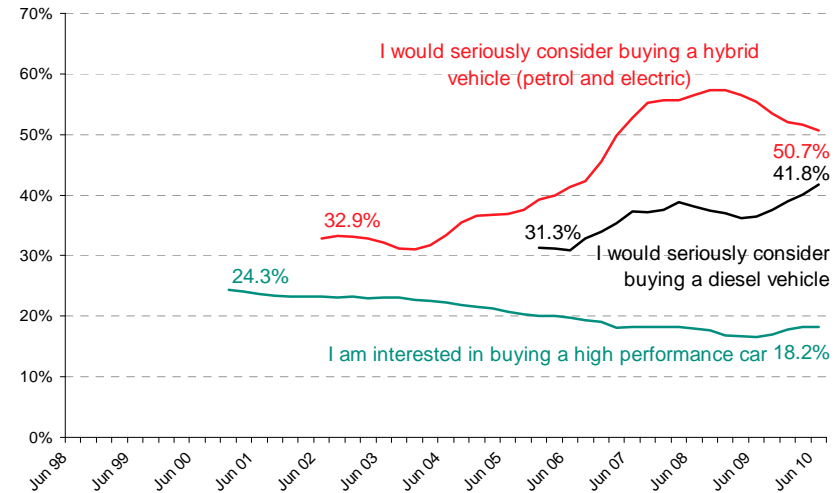
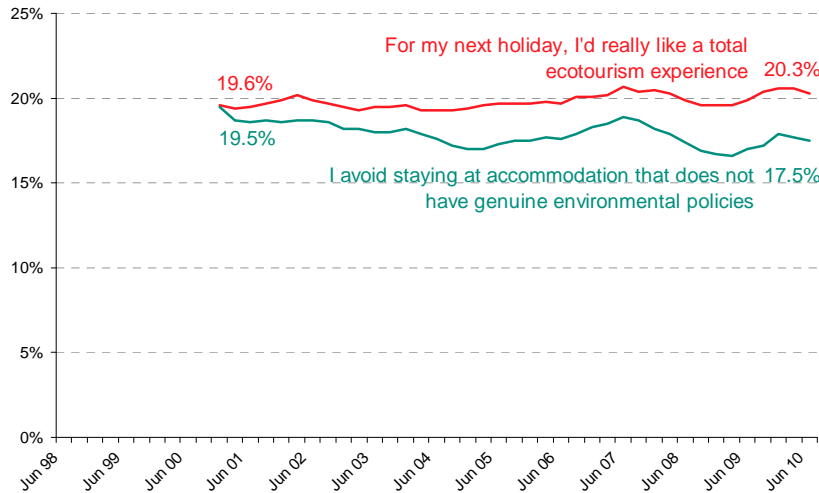
ENVIRONMENT

% Agree with Following Environmental Statements and Actions

Statements



Actions



Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

72% Women use Cosmetics

(6.5 Million Women aged 14+)

75% Women use Skincare

(6.8 Million Women aged 14+)

9% of Men use Cosmetics

(830,000 Males aged 14+)

32% Men use Skincare

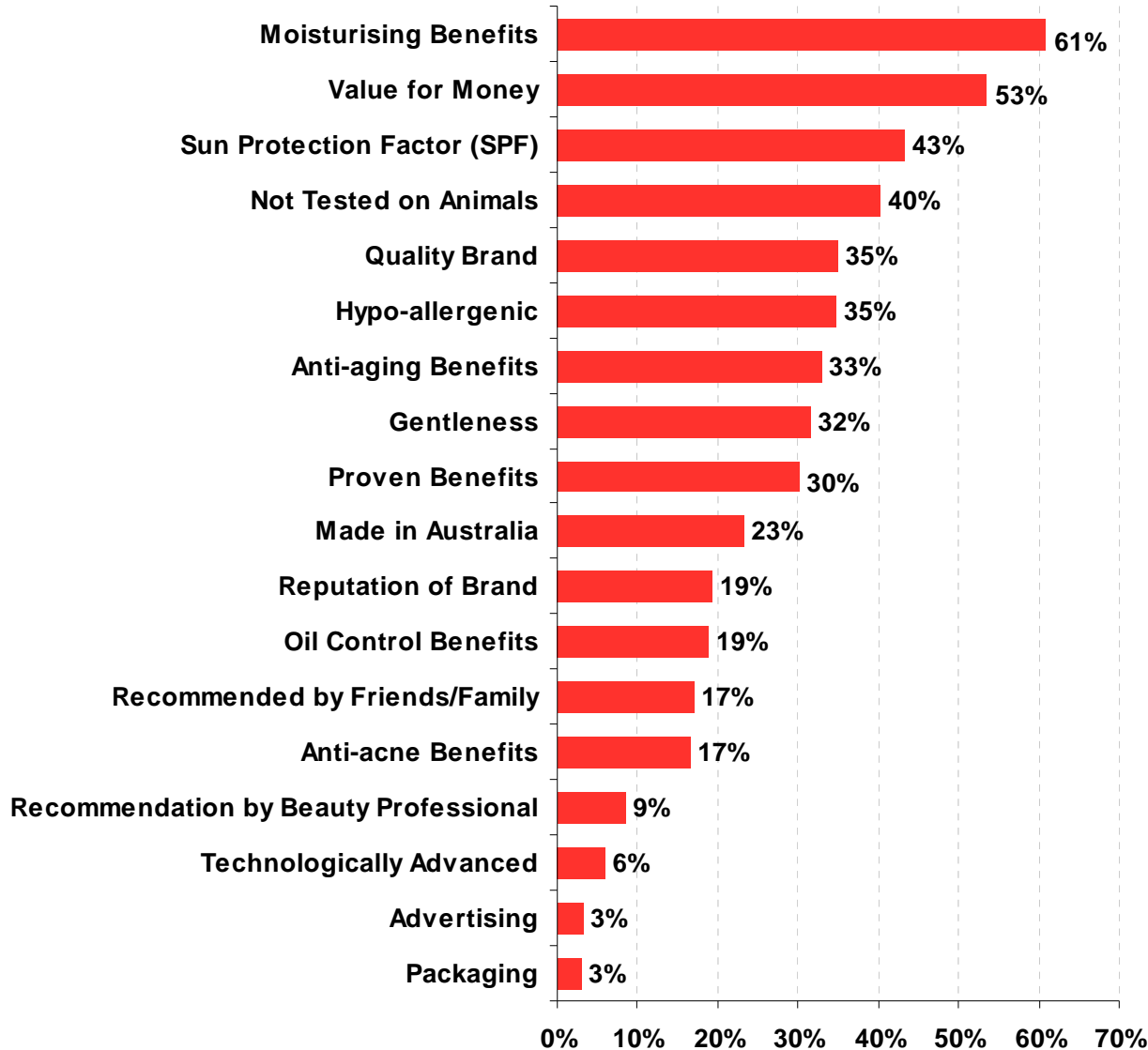
(2.8 Million Males aged 14+)

Source: Roy Morgan Single Source Jul09-Jun10

Base: Women used cosmetics (n=7680) Women used Skincare (n=8042) Men used cosmetics (n=707) Men used Skincare (n=2406)

FEMALE SKIN CARE

When purchasing skin care products which are important to you?

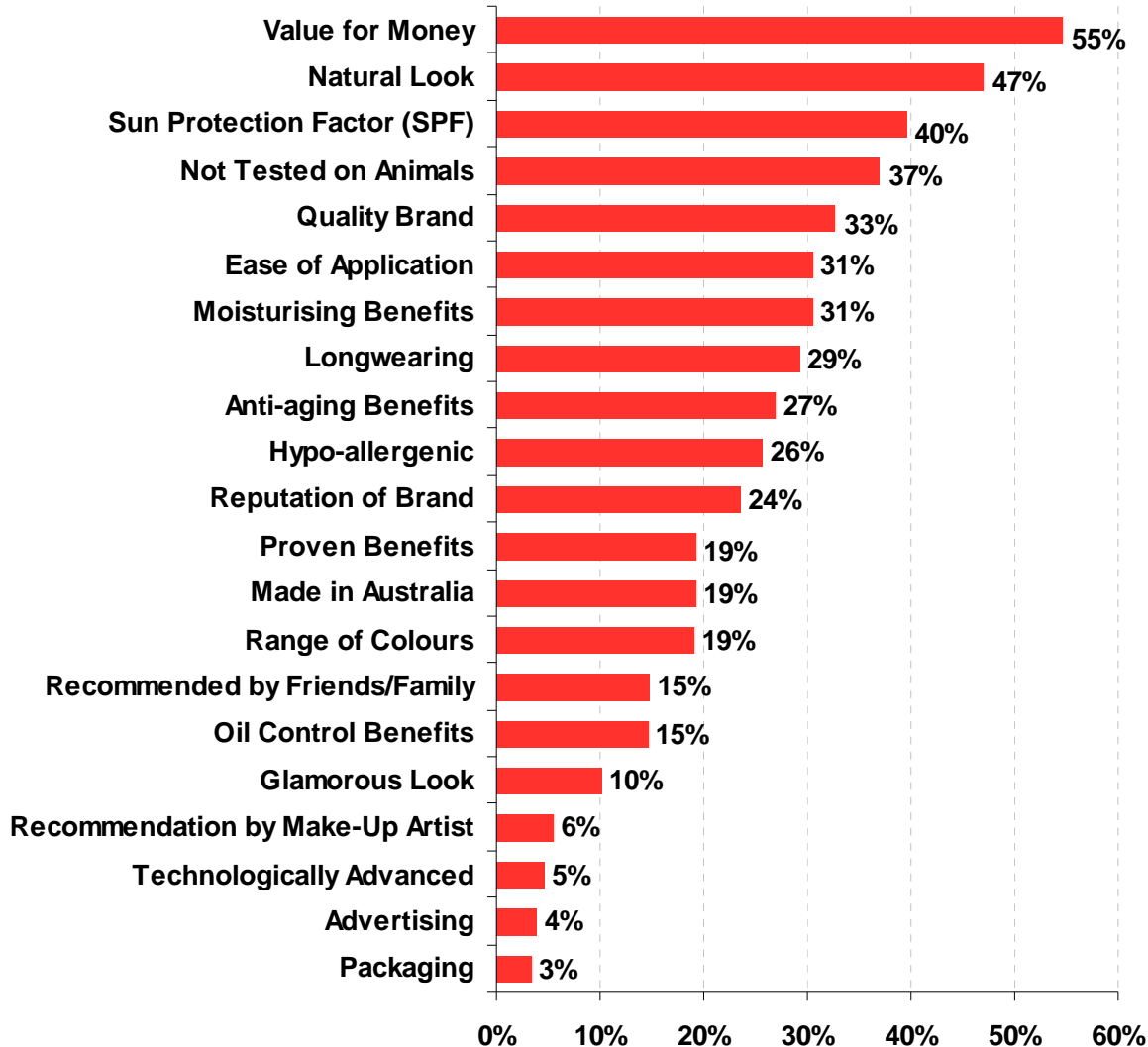


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FEMALE COSMETICS

When purchasing skin care products which are important to you?



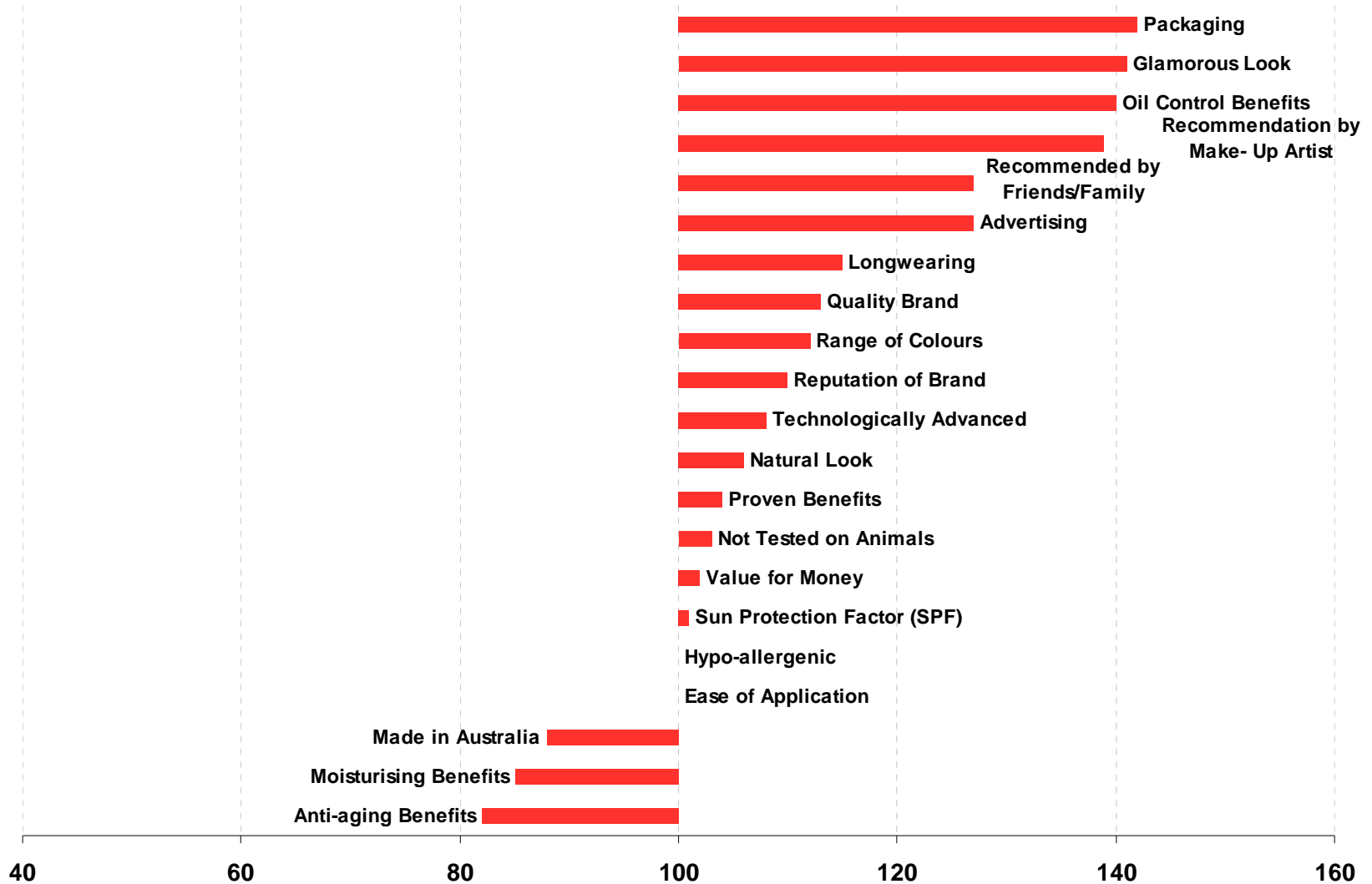
Discover your edge

Source: Roy Morgan Single Source Jul09-Jun10

Base: Women used cosmetics (n=7680) Women used Skincare (n=8042) Men used cosmetics (n=707) Men used Skincare (n=2406)

COSMETICS - indexed to Females under 50

When purchasing cosmetics which are important to you?



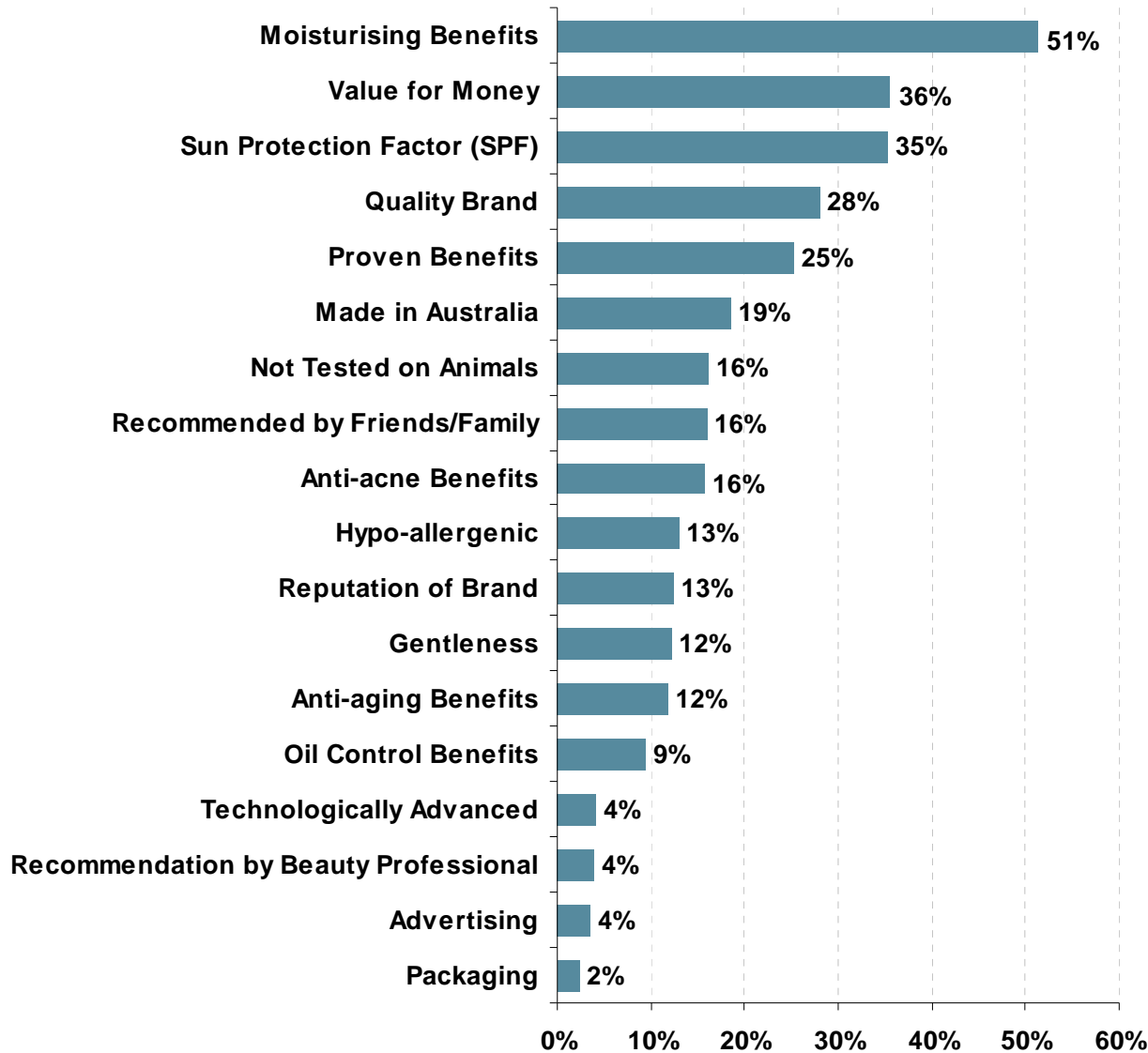
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MALE SKIN CARE

When purchasing skin care products which are important to you?

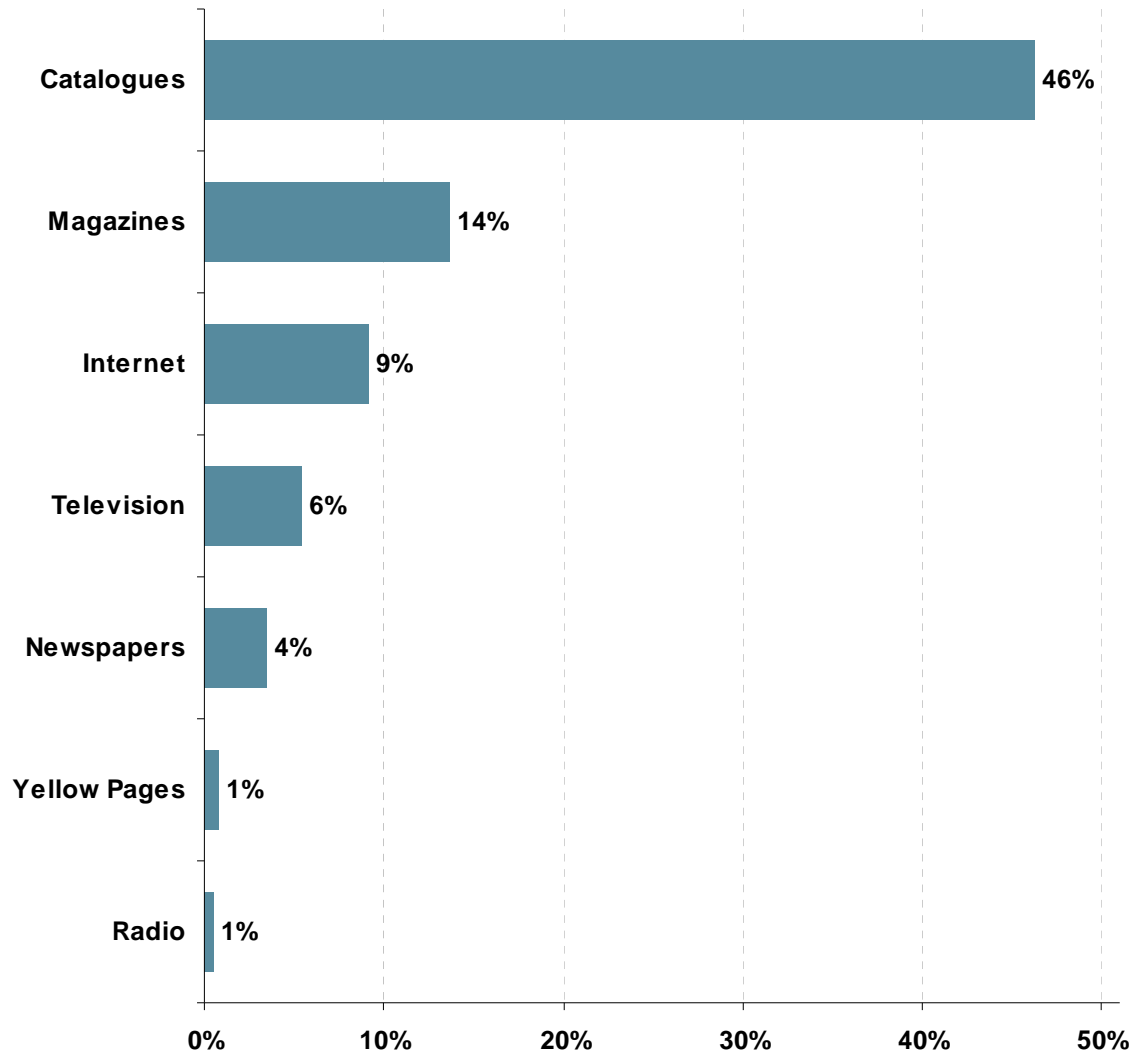


Source: Roy Morgan Single Source Jul09-Jun10

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MEDIA MOST USEFUL

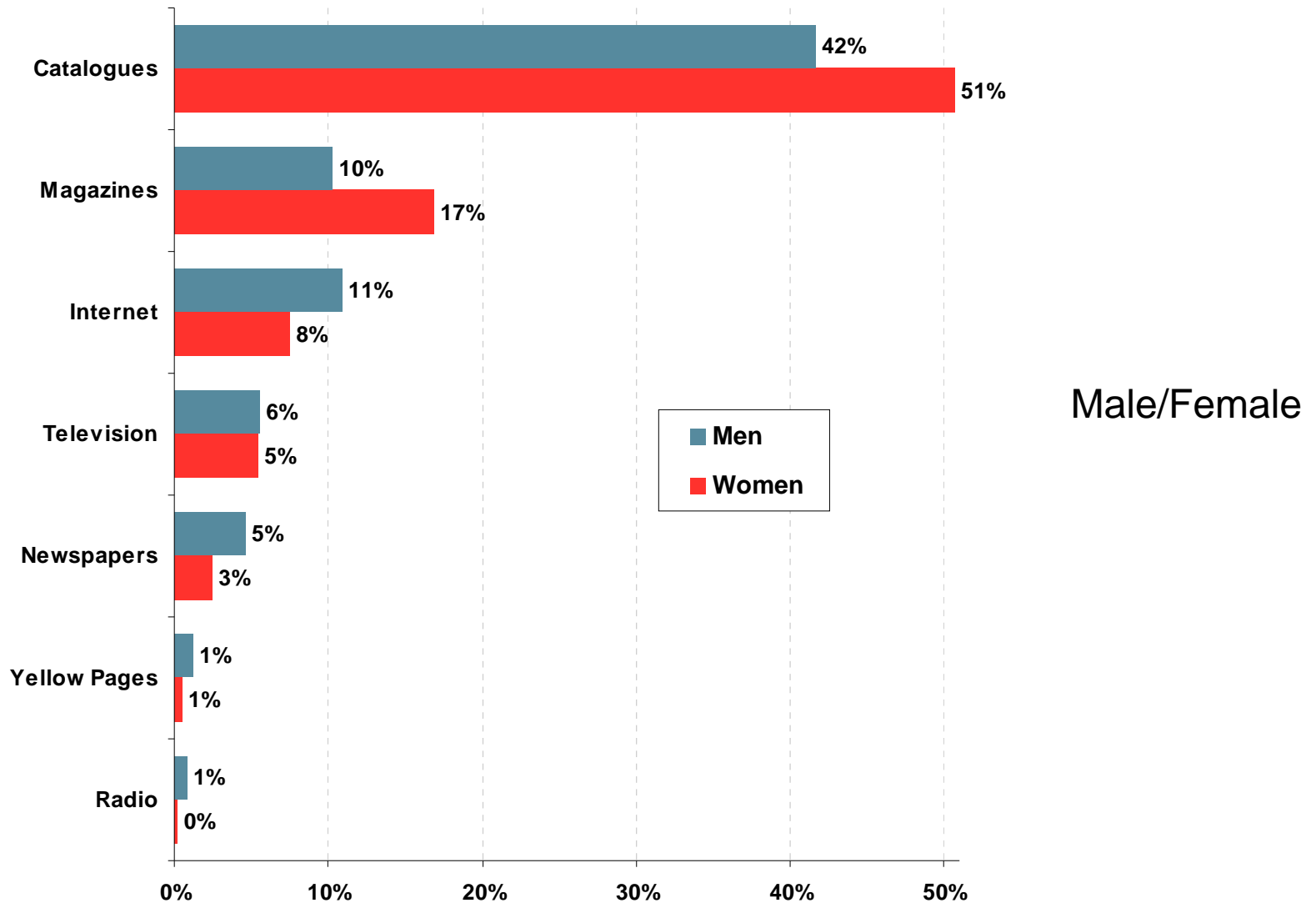
Which one media source would you find most useful for providing information when purchasing or selecting cosmetics or toiletries?



All respondents

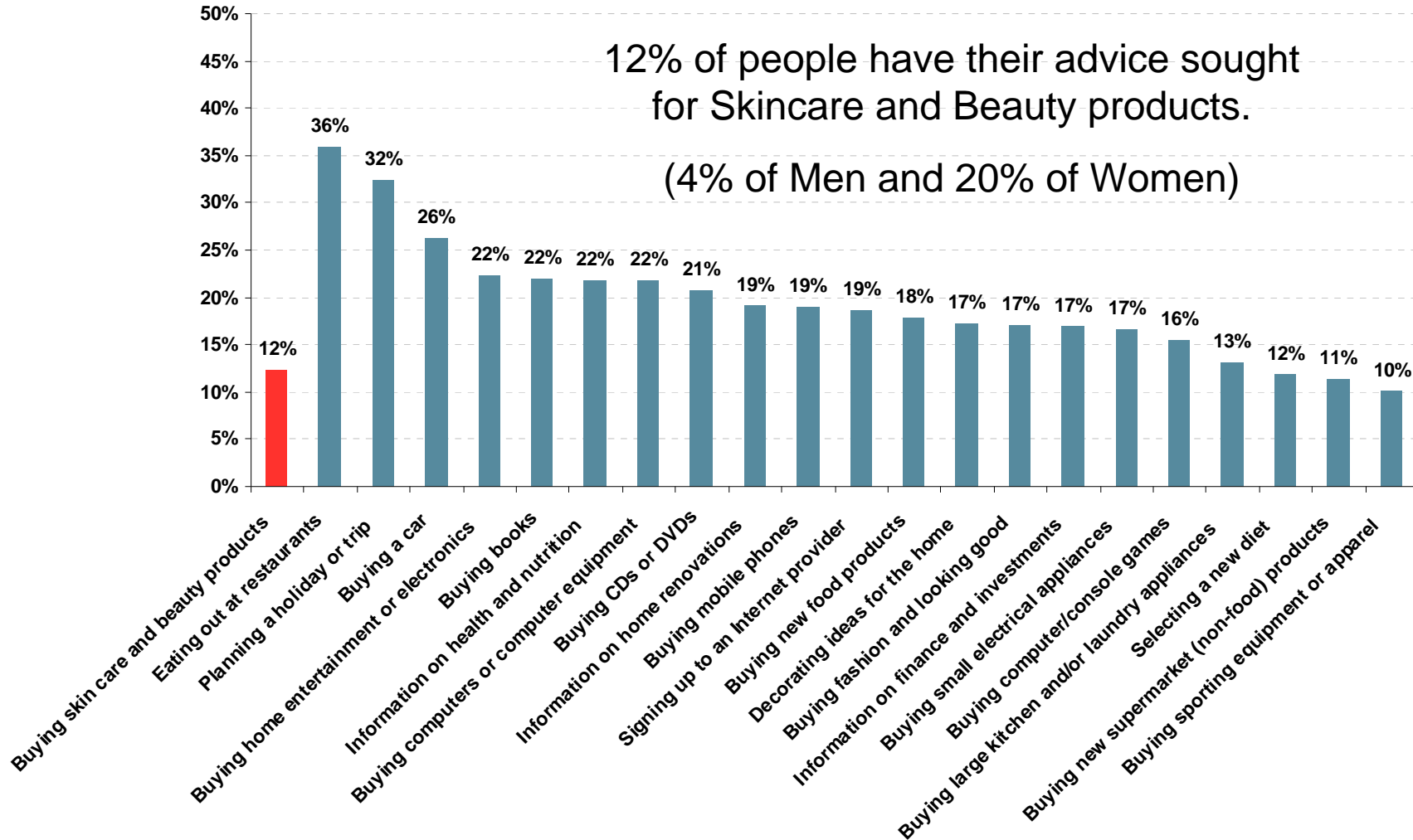
MEDIA MOST USEFUL

Which one media source would you find most useful for providing information when purchasing or selecting cosmetics or toiletries?



Trusted advisers for Skincare & Beauty products

Q – Friends/Family ask my advice about ?



Discover your edge

Source: Roy Morgan Single Source Jul09-Jun10

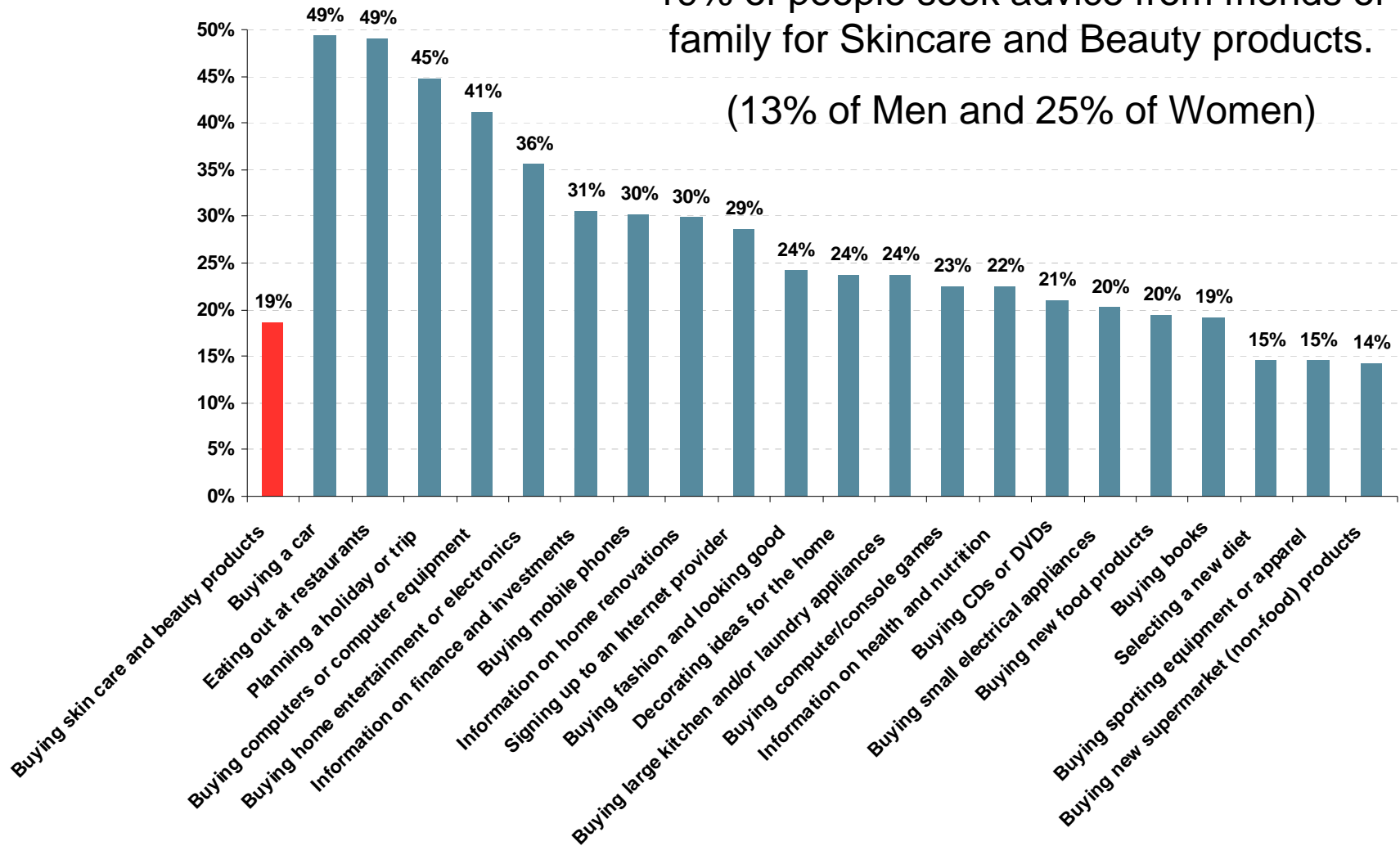
Base: Women (n=10830) Men (n=8137)

Info Seekers for Skincare & Beauty products

Q – I ask Friends/Family for advice about ?

19% of people seek advice from friends or family for Skincare and Beauty products.

(13% of Men and 25% of Women)

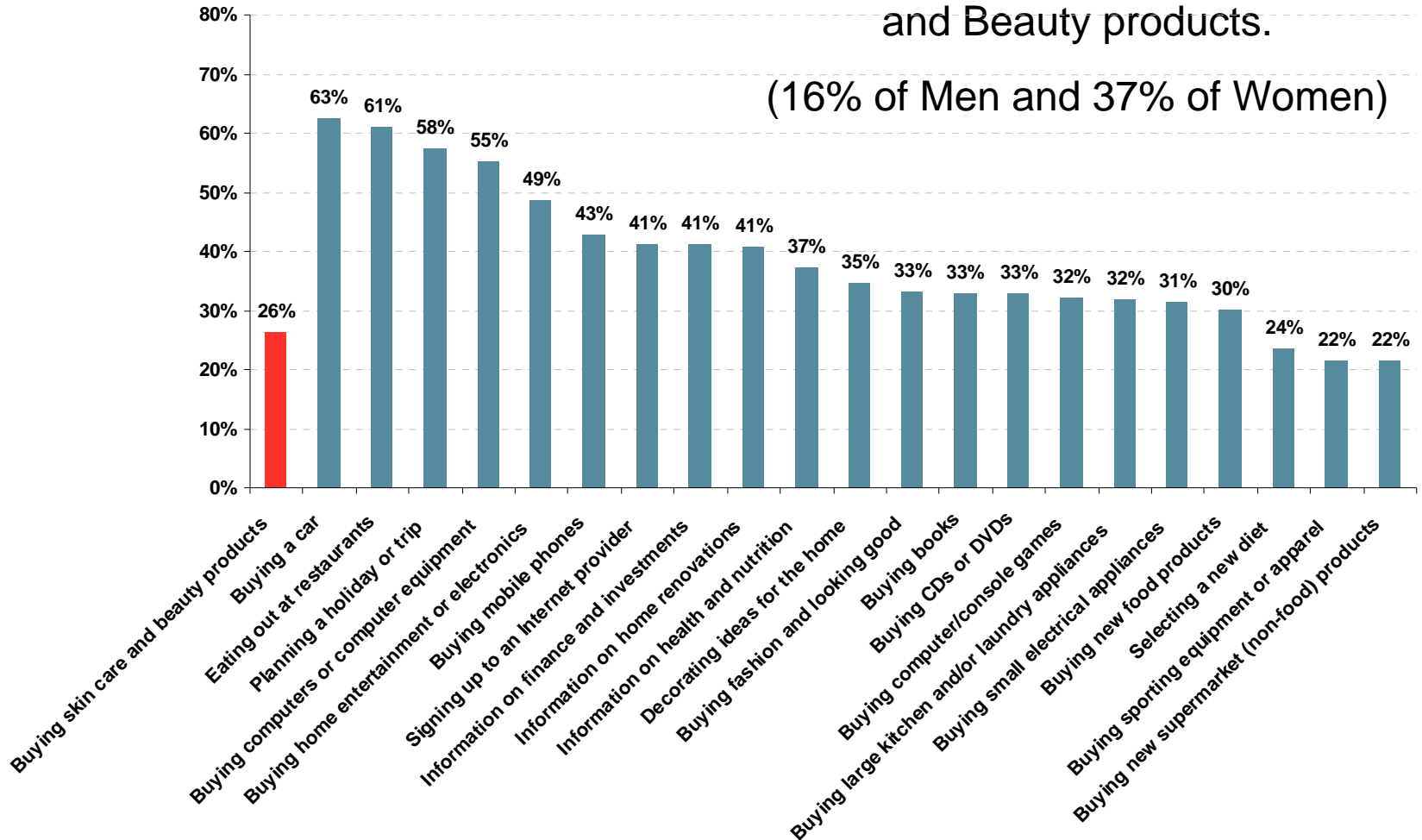


Discussed Skincare & Beauty products

Q – Friends/Family ask my advice about or I ask Friends/Family for advice about

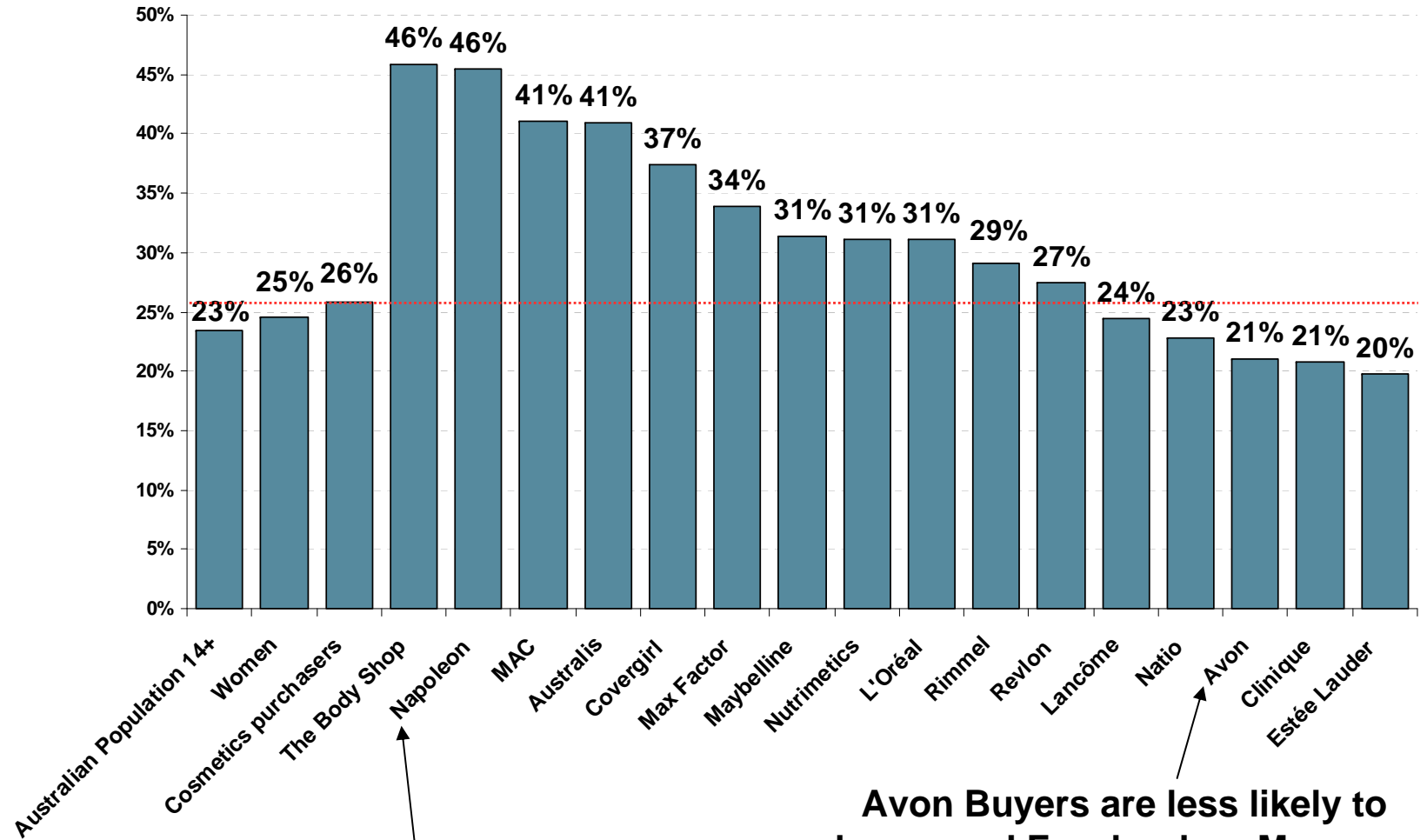
26% of people are talking about Skincare and Beauty products.

(16% of Men and 37% of Women)



Discover your edge

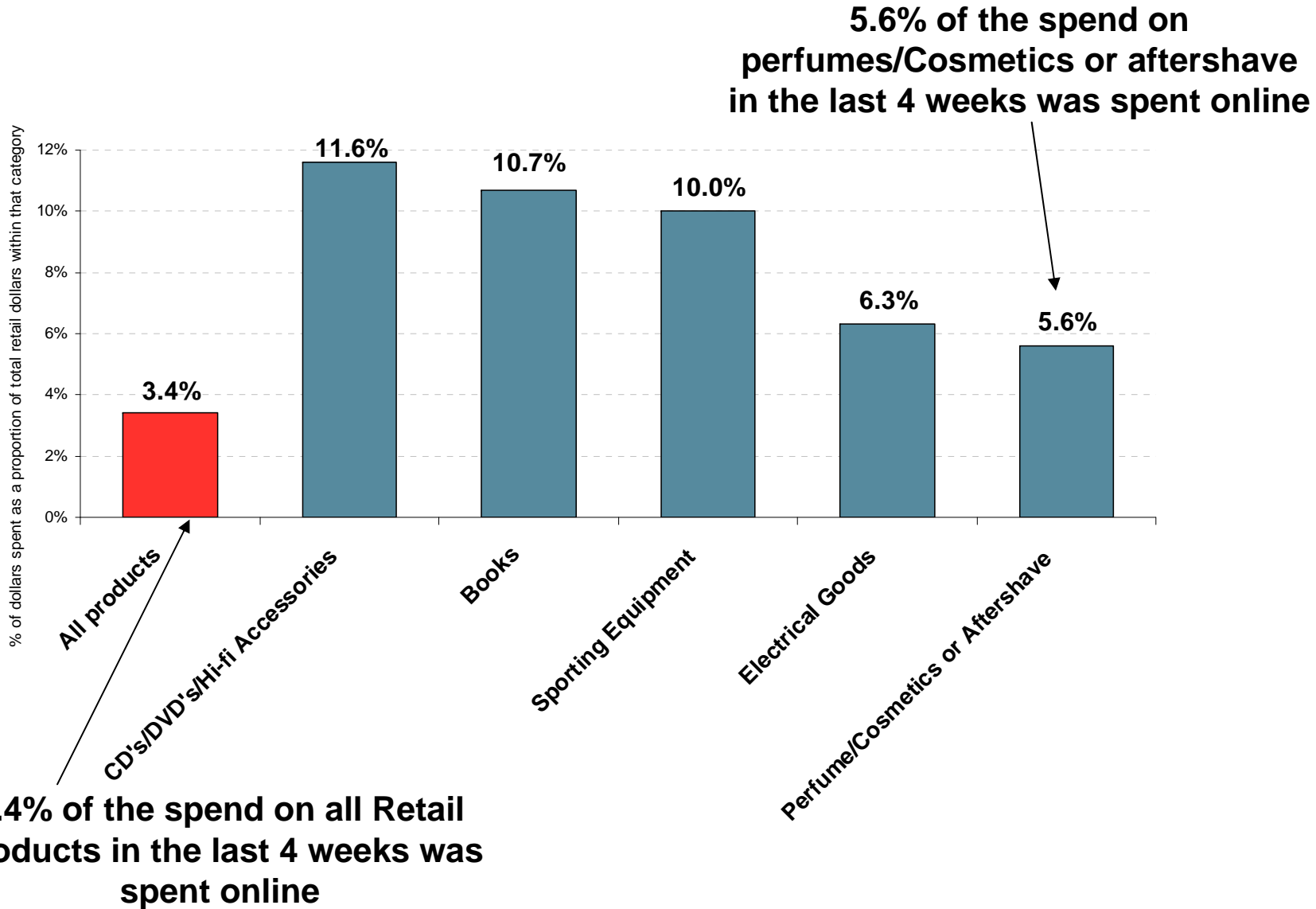
Social networking - Purchasers of each brand



46% of Napoleon buyers have used Facebook or Myspace in the last 4 weeks

Avon Buyers are less likely to have used Facebook or Myspace in the last 4 weeks

Proportion of spend online



For further information:

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