Australians’ Voting Intention

56% vs. 44%

Roy Morgan Government Confidence 109pts

Base: Australian electors aged 18+
Most Important Issues Facing the World

- Economic: 52%
- Environmental Issues: 22%
- Terrorism & War: 16%
- Social Issues: 9%

Base: Australian population aged 14+
Source: Roy Morgan Research; Nation-wide telephone poll; April 14-16, 2014 (n = 598)
State of the Nation 2014

Society

The Key Areas of Change
Australia’s Population

Base: Australians aged 0+
Source: Australian Bureau of Statistics
Australians with a Degree

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Progressive Views

Progressive viewpoint on social issues and trends 40.1%
Attracted to new things and new ideas 38.1%

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Progressive Attitudes

- Homosexual couples should be allowed to adopt children: 32.0% to 62.3%
- Computers and technology give me more control over my life: 23.2% to 40.9%

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Conservative Attitudes

- 66.5% of respondents believe the fundamental values of our society are under serious threat.
- 69.0% believe religion should be taught once a week in government schools.
- 59.7% support women taking care of running their homes and leave running the country to men.
- 53.5% of respondents.

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Security Concerns

I’m security conscious

Crime is a growing problem in my community

I feel less safe than I used to

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Marital Status

- Married: 49.4%
- Single: 26.2%
- Other Status: 15.2%
- De Facto: 9.2%

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Country of Birth

Note: Approximately 7% were born in other countries.
Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Alcohol Consumption
(in the last four weeks)

- Total Drunk Alcohol: 68.3%
- Wine: 43.5%
- Beer: 36.6%
- Spirits: 25.5%
- RTD (Ready to Drink): 14.2%
- Cider: 10.4%

Base: Australian population aged 10+
Source: Roy Morgan Research; 12 month moving average

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Smoking Incidence

Base: Australian population aged 10+
Source: Roy Morgan Research; 12 month moving average

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Gambling Incidence
(in the last three months)

- Total gambled in an average 3 months: 72.5%
- Lottery/Scratch Tickets: 63.9% → 50.8%
- Poker Machines: 31.7% → 42.2%
- Placed a Bet: 18.0% → 16.6%
- Keno: 10.8% → 12.0%
- Casino Table Games: 4.1% → 5.3%

Base: Australian population aged 18+
Source: Roy Morgan Research, 12 month moving average
Online Gambling
(in the last 12 months)

- Total used Internet to place a bet: 5.4%
- Bought a lottery ticket on the Internet: 2.2%
- Played Online Poker Machines: 0.2%
- Poker Machines: 4.0%

Base: Australian population aged 10+
Source: Roy Morgan Research; 12 month moving average

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Sport & Exercise Participation

Did some formal exercise (e.g. gym, aerobics, running, cycling, etc.) 51.5%

38.9%

32.0%

Played a sport 24.0%

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Holiday Intentions

- Intend to take a holiday in the next 12 months: 71.6%
- Next holiday will be in Australia: 57.8%
- Next holiday will be overseas: 10.0%

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Media consumption is also changing
Traditional Print Media

- Magazines: 88.9% (Jun 88), 69.8% (Mar 15)
- Non-community Newspapers (print): 64.9% (Jun 88), 51.8% (Mar 15)
- Local/Community Newspapers (print): 55.3% (Jun 88), 32.7% (Mar 15)

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Frequency of Internet Use

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Traditional Websites
(visited in the last four weeks)

- Search: 85.6%
- Email: 70.9%
- Portals: 43.9%
- Directories: 15.2%
- 58.1%

Note: Represents a change in methodology from respondent recall to machine based measurement.
Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average.
Commercial & Community Websites
(visited in the last four weeks)

- Online Communities & Messaging Sites: 79.5%
- News & Weather Sites: 59.8%
- Online Auctions Sites: 53.1%
- Banking Sites: 23.6%
- Real Estate and Renovation Sites: 4.9%

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- Represents a change in methodology from respondent recall to machine based measurement
- Base: Australian population aged 14+
- Source: Roy Morgan Research; 12 month moving average
Two in three of us have a smartphone…
Consumers are changing how they spend their time – or are they?
Just looking at the last decade, the time people spend with any media during the week looks fairly consistent.
If we look at how that time is shared across different media we see:

- Most time is spent with TV – almost 19 hours per week – some 3 hours less than 10 years ago
- Internet next at 13.4 hours per week
- Radio with almost 13 hours per week – down in a decade but showing signs of increase now (as we saw earlier with the return of listeners since 2013)
- Newspapers at 2.3 hours per week and magazines a little over an hour a week – both down a lot.

If we add internet at school and work, our online time goes to 1125.6 (19 hrs – the same as TV)
Streaming is an other game changer.
The numbers are still small – but as of a month ago, Netflix had 766,000 viewers, while Presto, Quickflix and Stan each had around 50,000.

Apple TV ownership has surpassed T-Box is strong, and Chromecast has quickly surpassed TiVo.
When I want it!

Media prevalence by time of day

When do consumers want what?
Media preferences by time of day

- Radio at breakfast (29%)
- Internet mid morning (26%)
- Internet at lunch (23%)
- Internet mid afternoon (30%)
- TV at dinner (52%)
- TV after dinner (60%)

At breakfast 29% of Australians prefer radio, ahead of TV (23%), with Internet and newspapers at around 16%.

By mid morning it’s Internet (26%) ahead of radio (22%).

At lunch it’s Internet 23% and radio 14%, just ahead of TV at 13%.

In the afternoon it’s Internet 30% ahead of radio 20% and TV 16%

By dinner it all changes – 52% prefer TV, way ahead of Internet 14% (and little interest in other media)

After dinner, TV still leads and is preferred by 60% of people ahead of Internet at 30% and radio 8%.

Of course different people have different preferences, but the pattern is clear – traditional media is alive and well and important to Australians at important times of their day.
State of the Nation 2015

Technology
We have all seen innovations come and go – like the DVD, digital cameras, etc.
In recognition of the fact that we need to understand the rapid changes in technology and their impact on consumers, Roy Morgan Research undertook a major study of technology and how Australians are adapting to it. The study’s results, which were first launched in May 2012, show that different segments of the population are taking up the new technology at very different rates.

In essence, the technology adoption curve is an innovation curve – there are early adopters at one end and laggards at the other, with the majority in the middle.

This framework is particularly informative in relation to understanding who is consuming which media via which means, eg. are people reading the newspaper via app, or website on their PC, or in hard copy.

Roy Morgan is of course measuring all these nuanced ways of reading and we will go into it a little more in the technology section.
We see, the traditional media has moved into ‘Maturity’, while smart watches, streaming and Apple TV are in early adopter territory. Smart TVs were in the realm of early adopters just 18 months ago and are now mainstream.
And of course it is not just how many you reach, but who.

These are the kinds of movies heavy Facebook users like – is this your audience?
These are the types of TV shows heavy YouTube users watch. Is that your target audience?

If you are, say, a managed investment fund targeting ‘people with 1 million dollars to invest’ – it is probably not your audience.

In fact, our data shows there are as many of these wealthy ($1mill plus individuals) watching SBS One as there are using Facebook.
Major Banking Channels
(used in the last four weeks)

<table>
<thead>
<tr>
<th>Channel</th>
<th>Jun 98</th>
<th>Mar 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited any branch or financial institution**</td>
<td>60.6%</td>
<td>33.2%</td>
</tr>
<tr>
<td>Used website to conduct banking</td>
<td>52.1%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Used internet banking on mobile phone/tablet</td>
<td>14.5%</td>
<td>30.4%</td>
</tr>
<tr>
<td>Used phone banking</td>
<td>16.5%</td>
<td>16.2%</td>
</tr>
</tbody>
</table>

**Question was not asked prior to January 2011.**

**Question revised from October 2012 to link service usage with the institution(s) that the respondent has a traditional banking relationship with.**

Base: Australian population aged 14+

Source: Roy Morgan Research, 12 months to June 1998, 12 months to December 2011 & 12 months to March 2015.
Products purchased using the Internet
(in the last four weeks)

Base: Australian population aged 14+ who purchased a product using the internet in the last four weeks
Source: Roy Morgan Research; 12 months to March 2015
State of the Nation 2014

Economy

The Key Areas of Change
Level of Workforce Unemployment

Source: Roy Morgan Research; Monthly data
Source: Australian Bureau of Statistics; Monthly data
Unemployment by Age

Base: Australians in the workforce aged 14+
Source: Roy Morgan Research; 12 month moving average

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Australians in Employment

Proportion of Australians 14+ Employed

- 58.9% (11.4 mil)
- 55.7% (8.3 mil)

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average
Australians in Employment
- Men vs. Women

Proportion of Men Employed
- 63.6% (4.7 mil)
- 64.9% (6.2 mil)

Proportion of Women Employed
- 48.0% (3.6 mil)
- 53.0% (5.2 mil)

Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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* “At Risk” is based on those paying more than a certain proportion of their household income (30% to 45% depending on income) into their loans based on the appropriate Standard Variable Rate reported by the RBA and the amount the respondent initially borrowed.

** “Extremely at Risk” is based on those paying more than a certain proportion of their household income (30% to 45% depending on income) into their home loans based on the cash rate set by the RBA and the amount respondents currently owe on their home loan.
What Roy Morgan Research does matters
Throughout the day you will see examples of how Roy Morgan Research makes a difference in many and varied industries.
We are very proud of what we do and hope that you are proud to be a part of it too.

Hope that you enjoy the day and get a lot out of it all and I will see you later on for the dinner.
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