



Roy Morgan
— Research —

State of the Nation

Australia

Australia Today



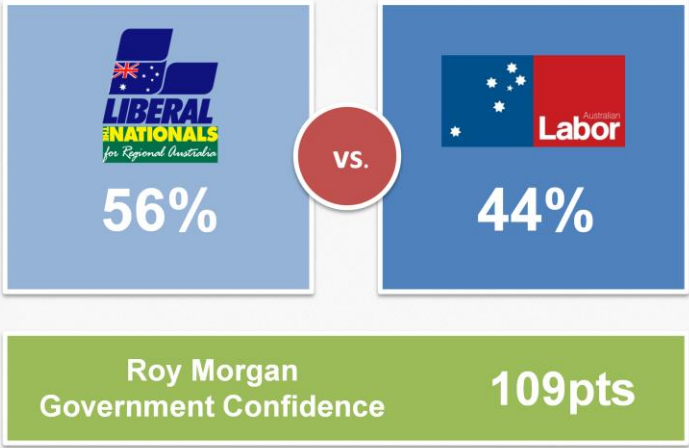
[1] Roy Morgan Face-to-Face; June 13/14, 2015; Australian population aged 14+
[2] Roy Morgan Face-to-Face Survey; May 2015; Australian population aged 14+ in Workforce

[3] Roy Morgan Business Single Source; May 2015
[5] FuelWatch - Metro WA; May 2015
[6] APRA; March 2015

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Australians' Voting Intention

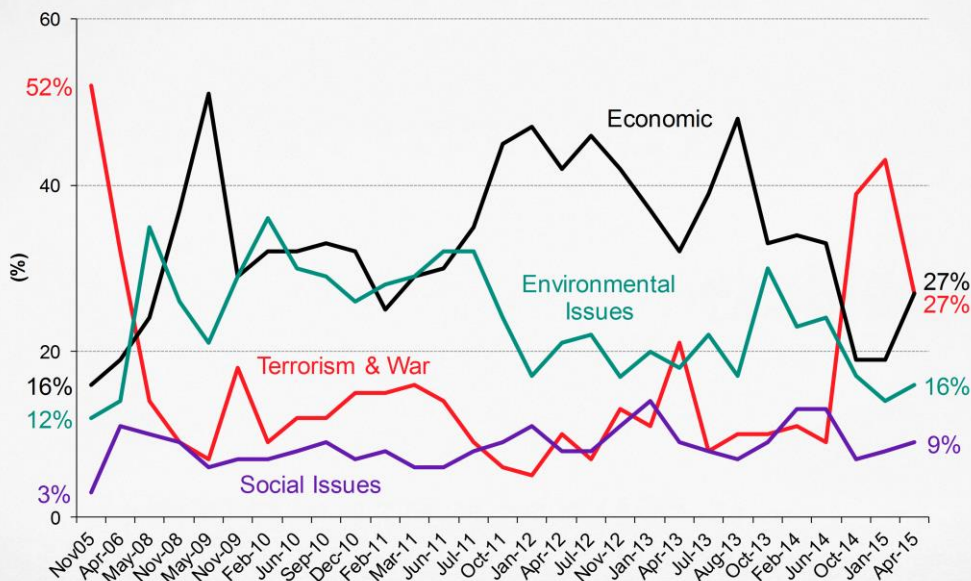


Base: Australian electors aged 18+
Source: Roy Morgan Research Multi-Mode Survey, June 6 – 7 & 13 – 14, 2015

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Most Important Issues Facing the World



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

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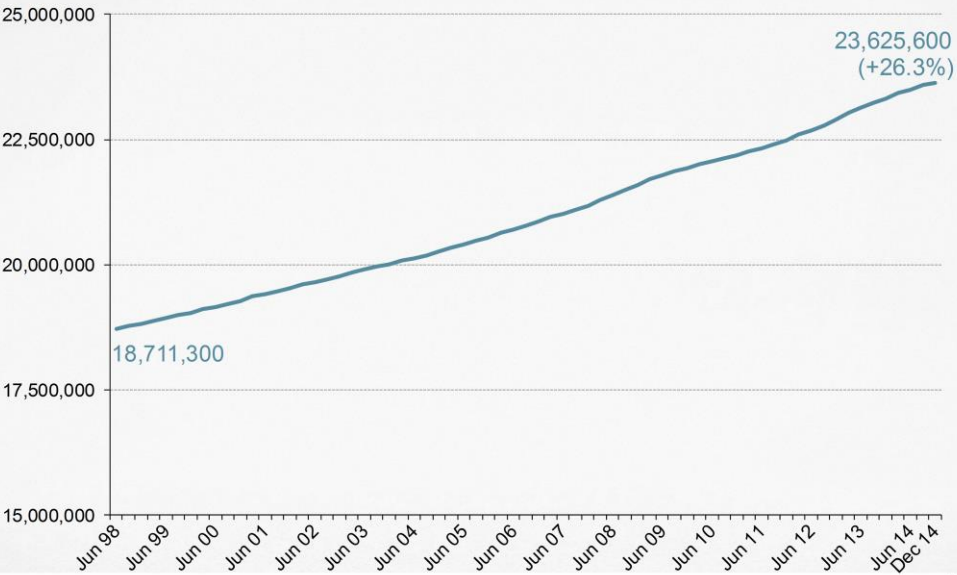
Society

The Key Areas of Change

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Australia's Population

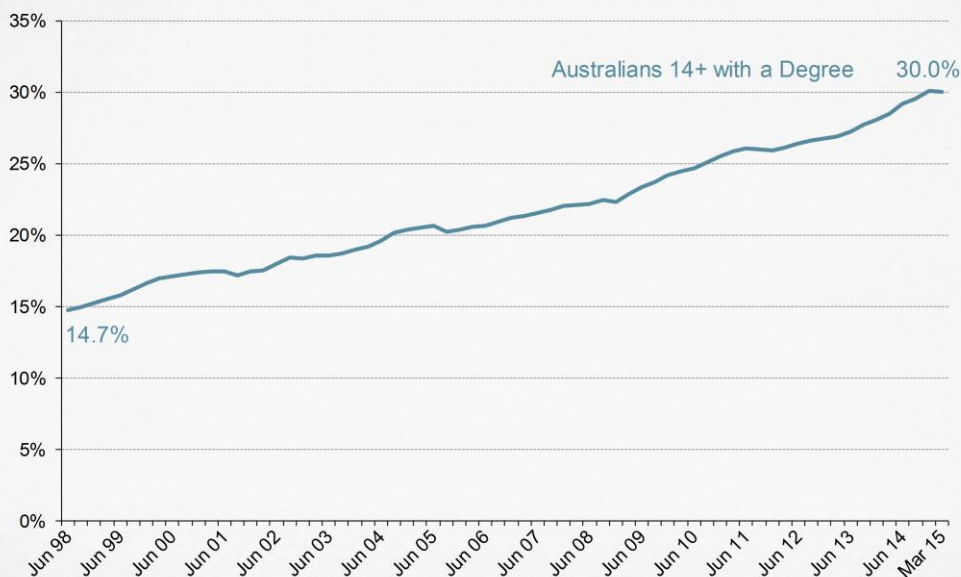


Base: Australians aged 0+
Source: Australian Bureau of Statistics

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Australians with a Degree

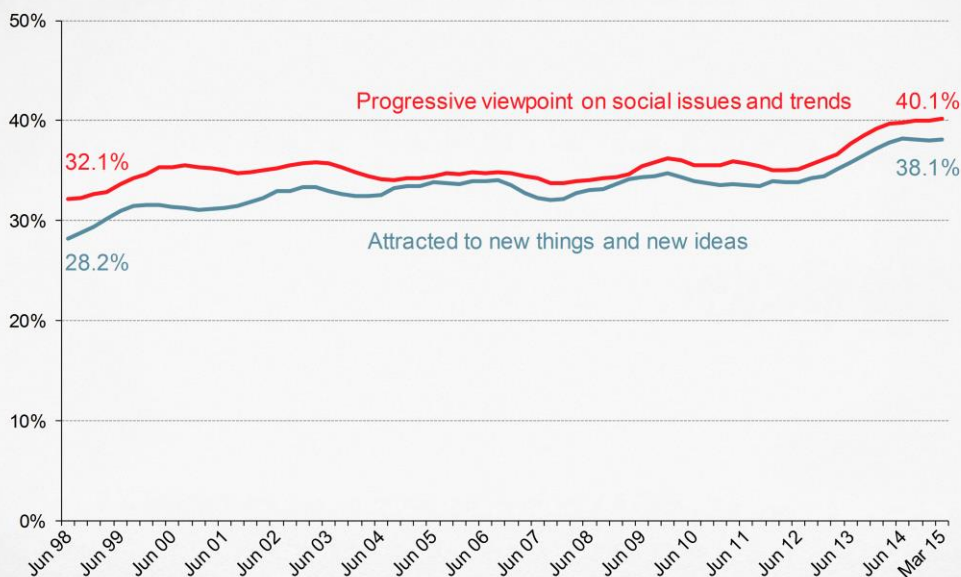


Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Progressive Views

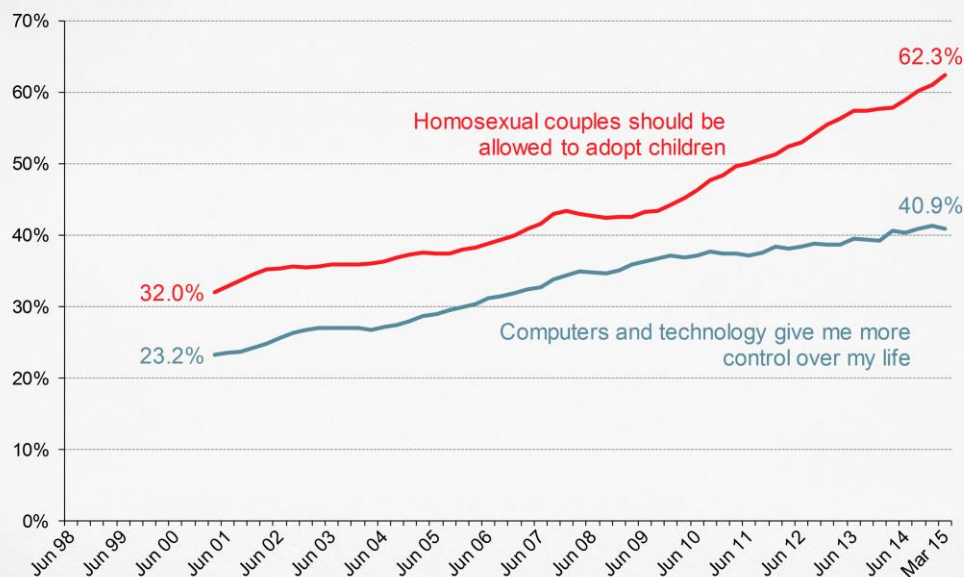


Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Progressive Attitudes

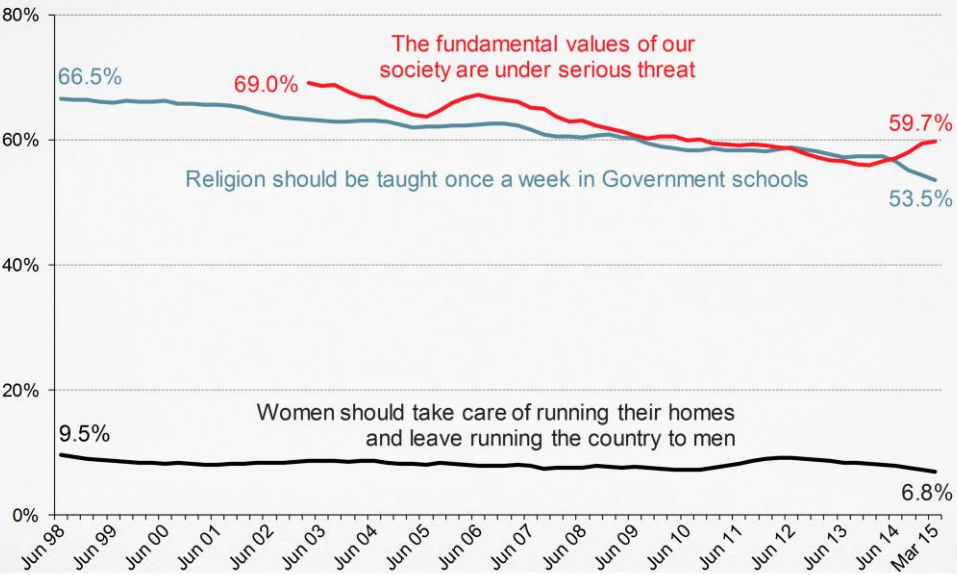


Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Conservative Attitudes

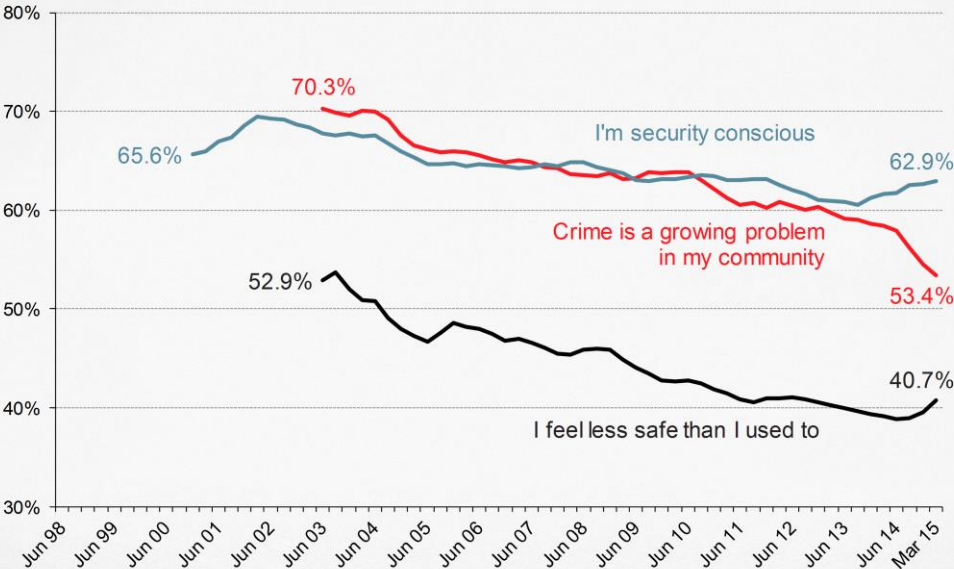


Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Security Concerns

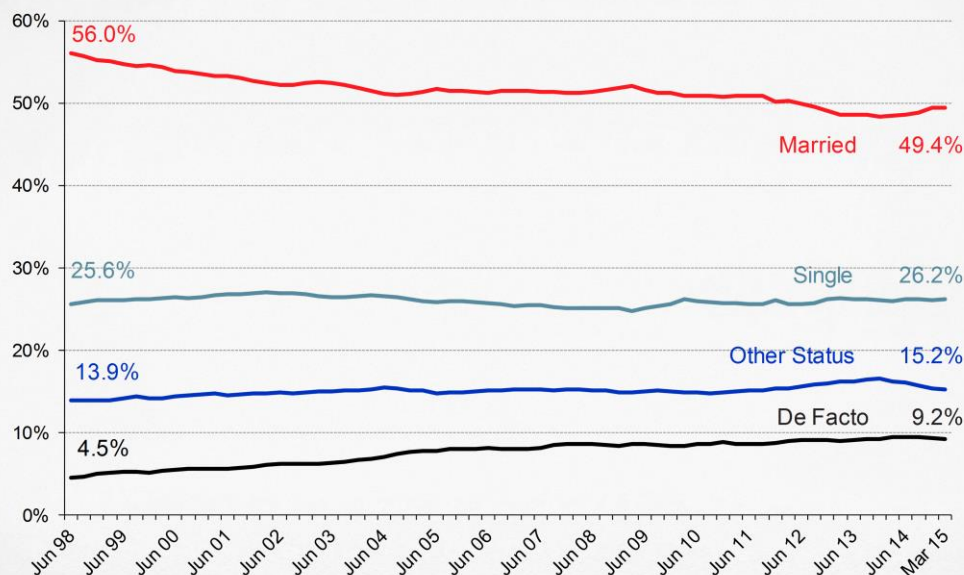


Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Marital Status

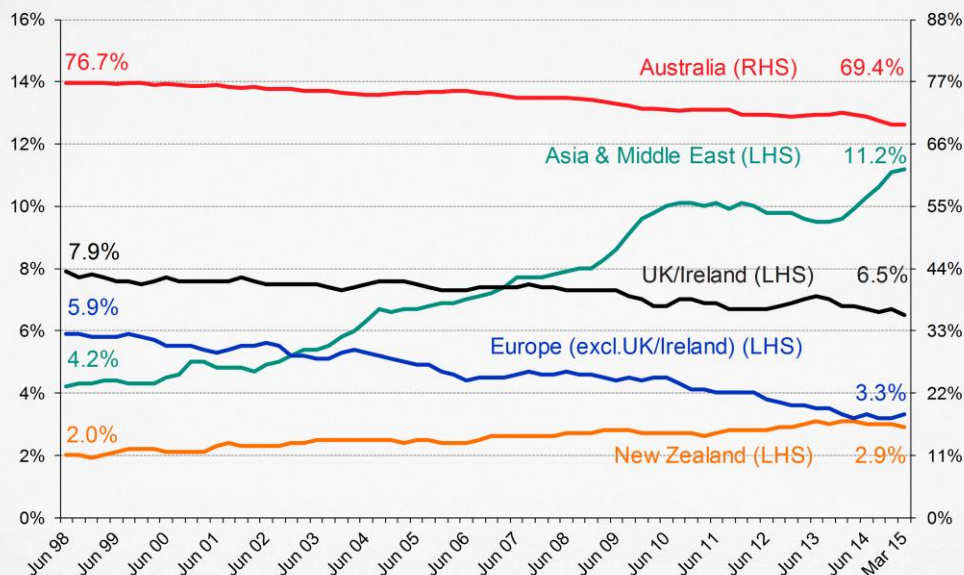


Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Country of Birth



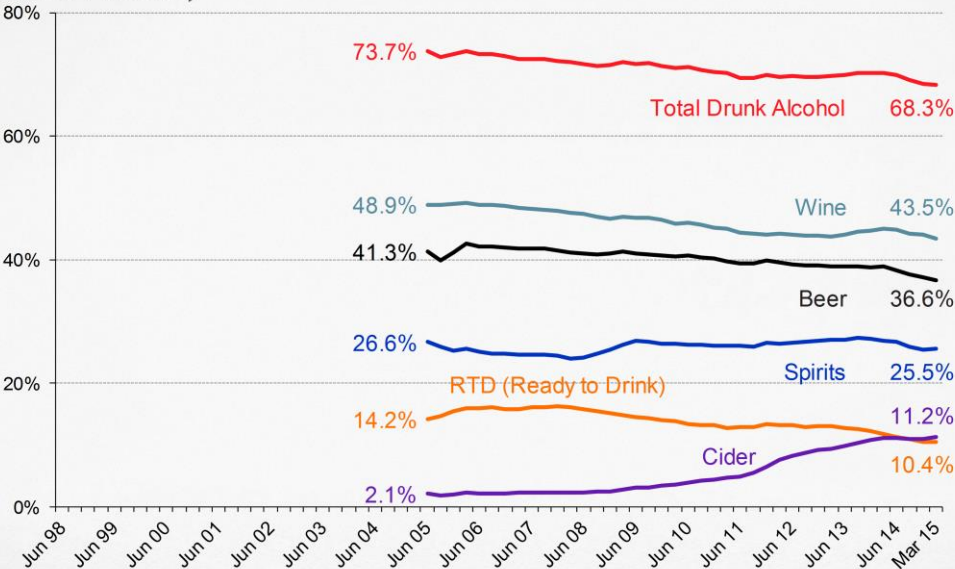
Note: Approximately 7% were born in other countries.
Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Alcohol Consumption

(in the last four weeks)

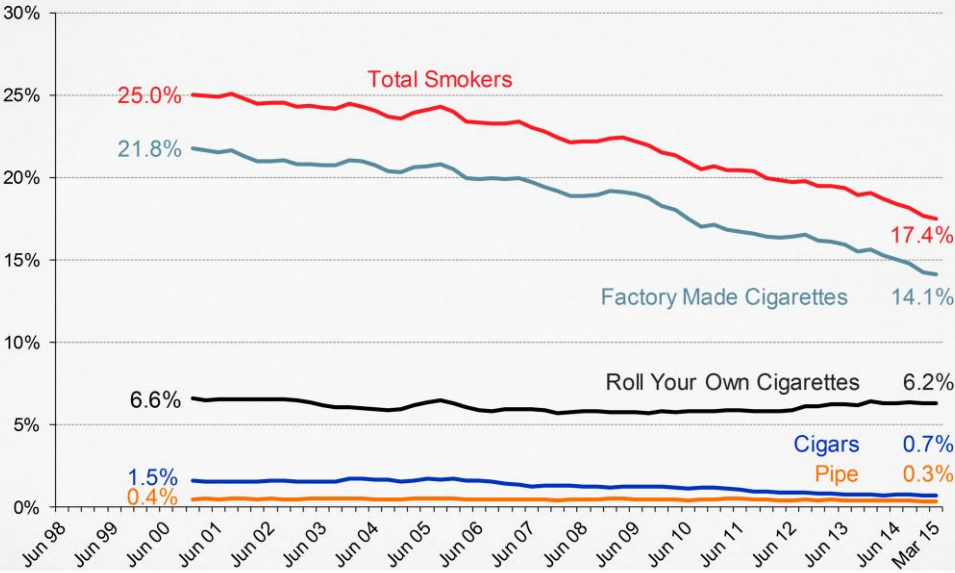


Base: Australian population aged 18+
 Source: Roy Morgan Research; 12 month moving average

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Smoking Incidence



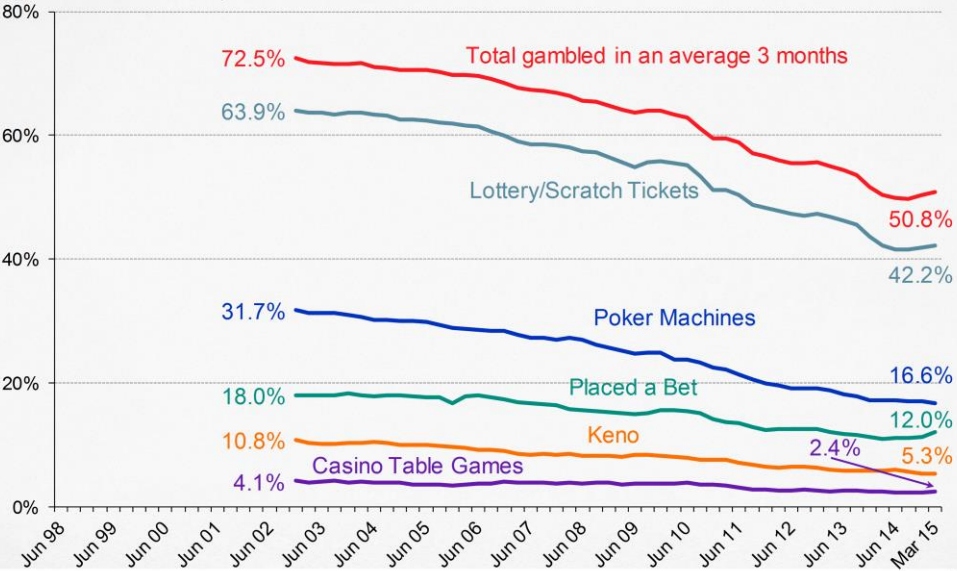
Base: Australian population aged 18+
Source: Roy Morgan Research; 12 month moving average

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Gambling Incidence

(in the last three months)



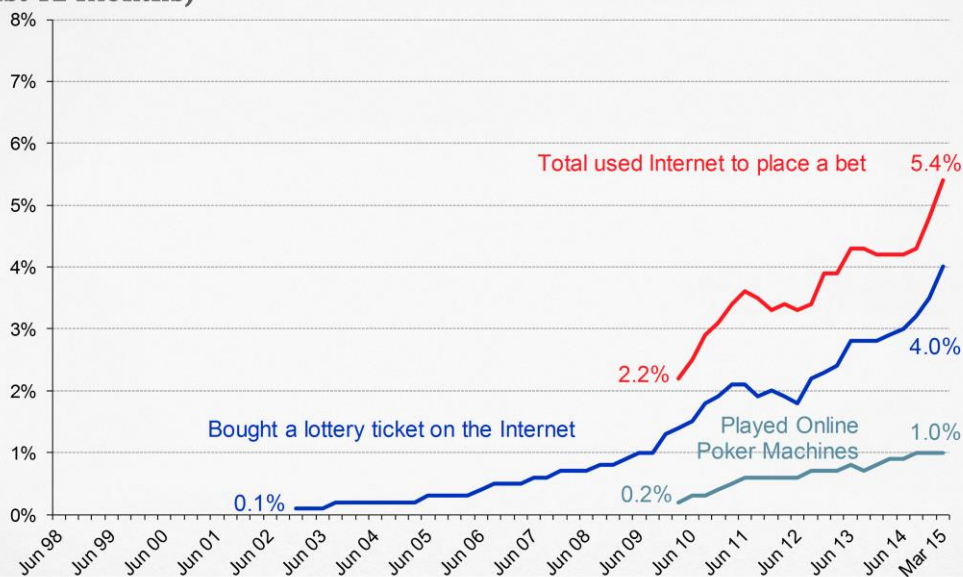
Base: Australian population aged 18+
Source: Roy Morgan Research; 12 month moving average

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Online Gambling

(in the last 12 months)

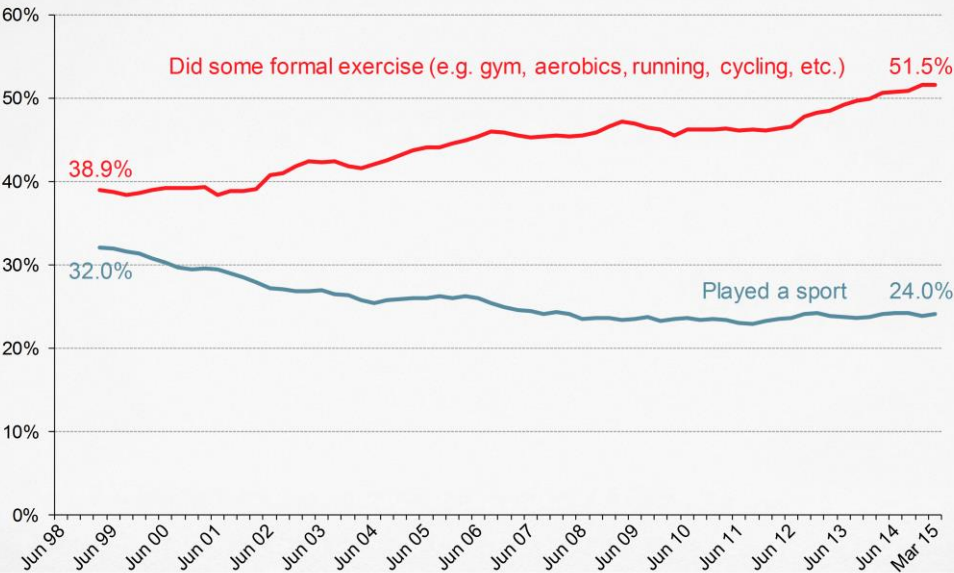


Base: Australian population aged 18+
Source: Roy Morgan Research; 12 month moving average

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Sport & Exercise Participation



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

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Holiday Intentions



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

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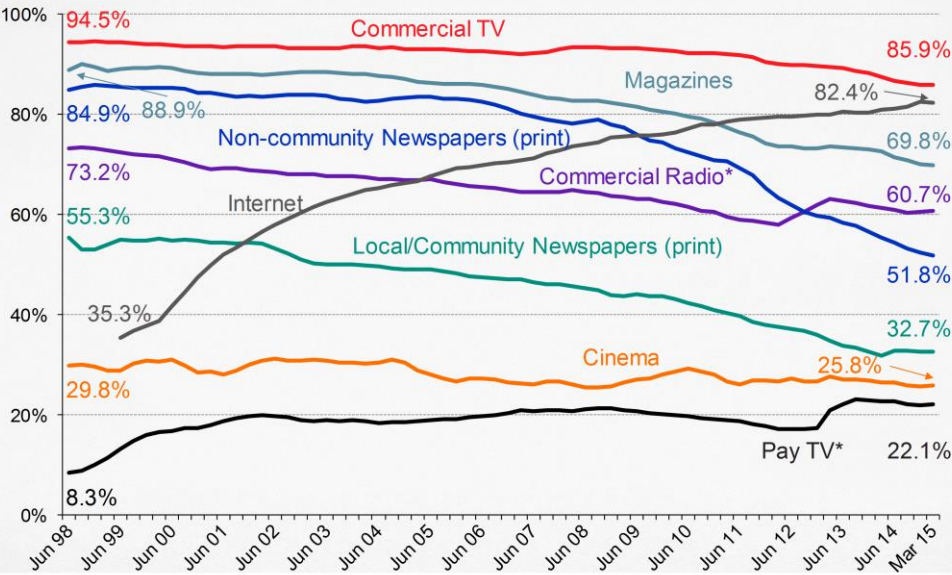
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Media consumption is also changing

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Major Media Types

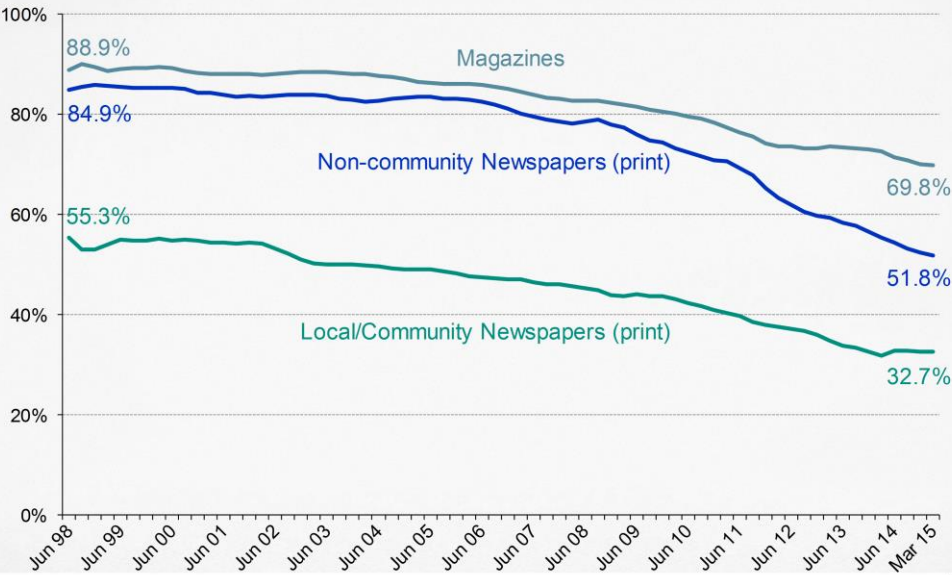


*Question revised in April 2012 for Commercial Radio and September 2012 for Pay TV
 Base: Australian population aged 14+
 Source: Roy Morgan Research; 12 month moving average

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Traditional Print Media

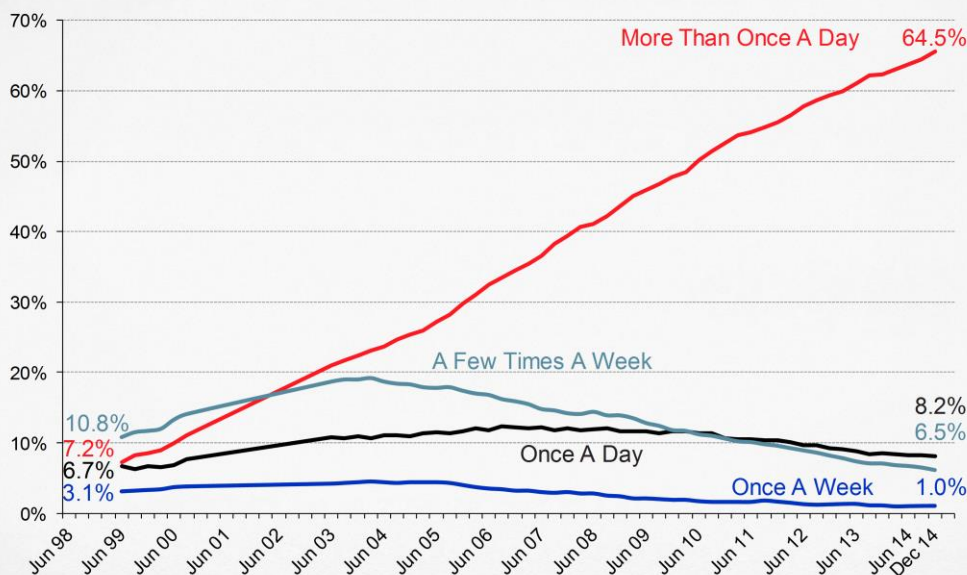


Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Frequency of Internet Use



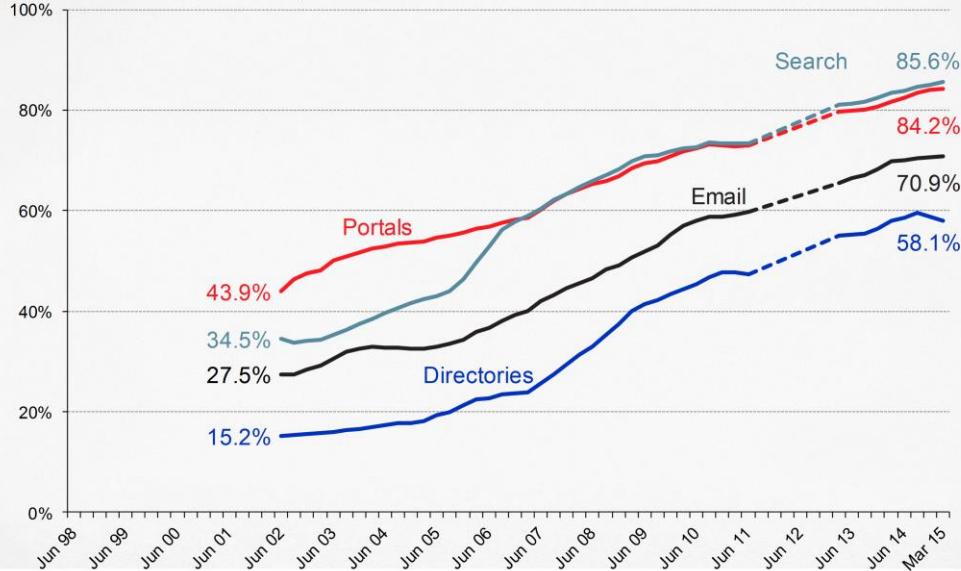
Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Traditional Websites

(visited in the last four weeks)



--- Represents a change in methodology from respondent recall to machine based measurement

Base: Australian population aged 14+

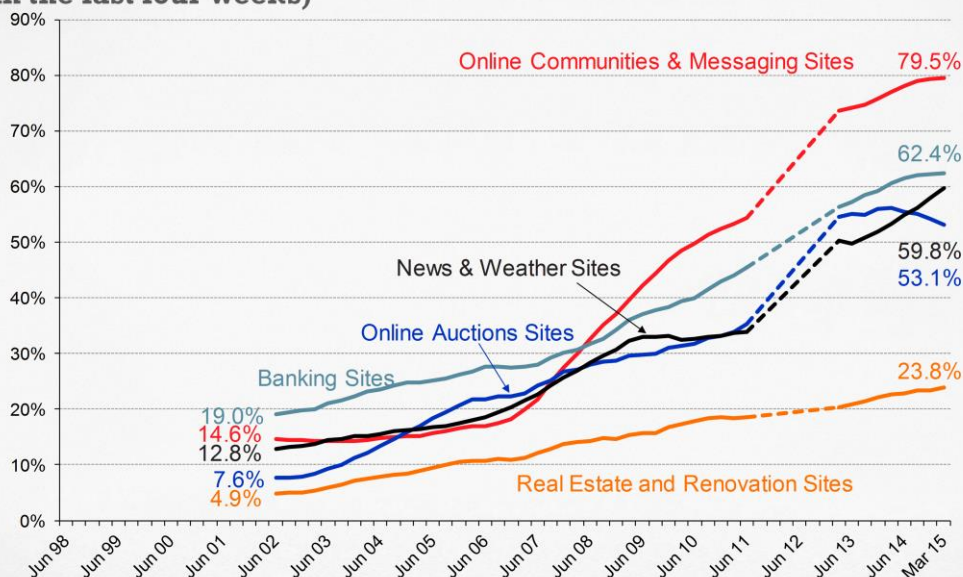
Source: Roy Morgan Research; 12 month moving average

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Commercial & Community Websites

(visited in the last four weeks)



— — Represents a change in methodology from respondent recall to machine based measurement

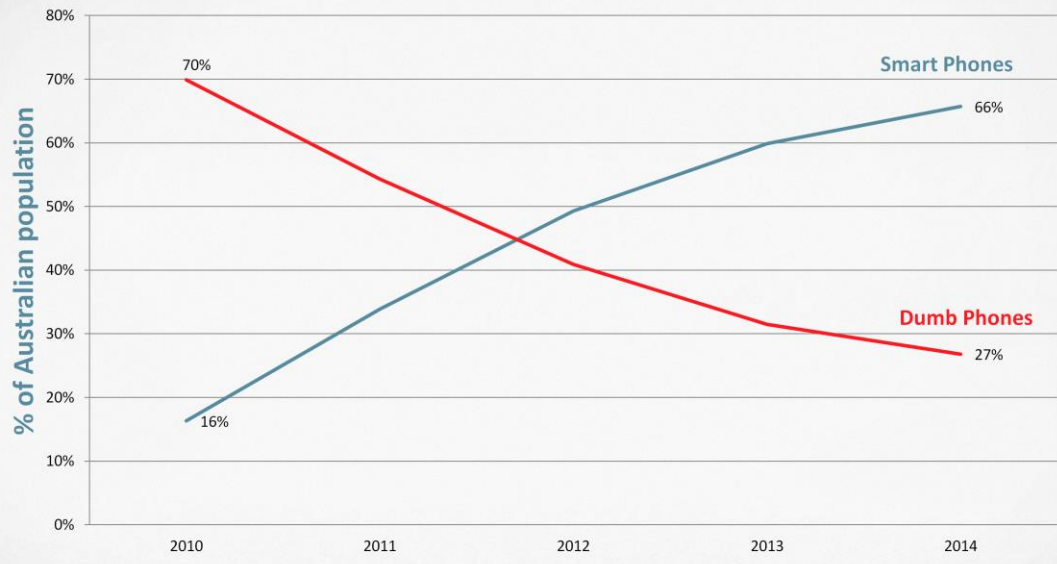
Base: Australian population aged 14+

Source: Roy Morgan Research; 12 month moving average

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Types of Mobile Phone Used



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Two in three of us have a smartphone...

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Time spent with Media

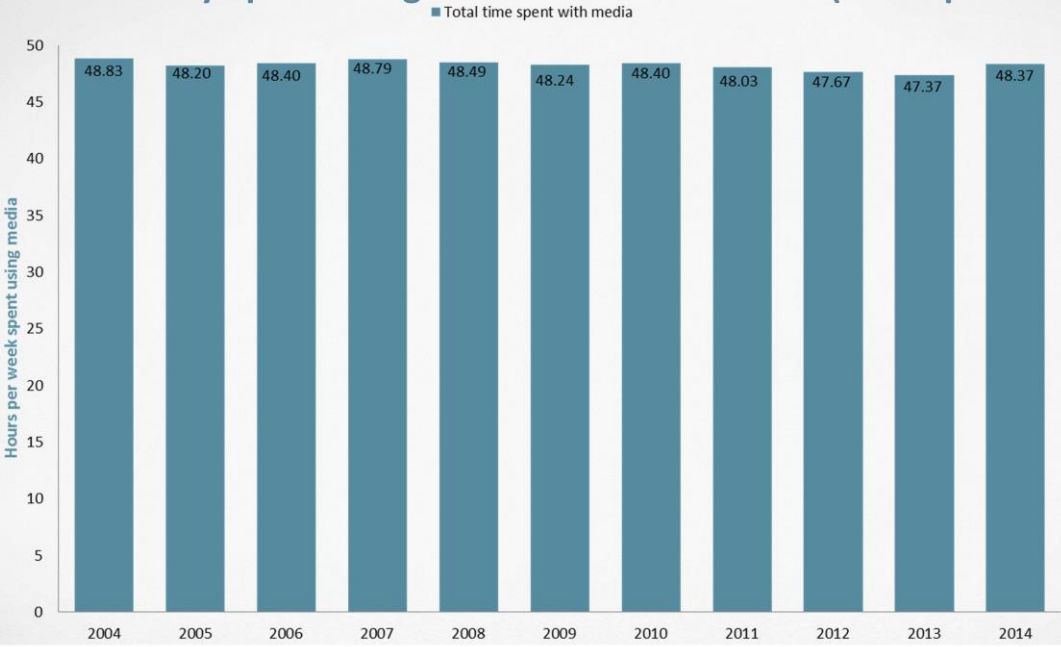
Consumers are changing how they spend their time

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Consumers are changing how they spend their time – or are they?

Average Time Usually Spent Using Media for Whole Week (hours per week)

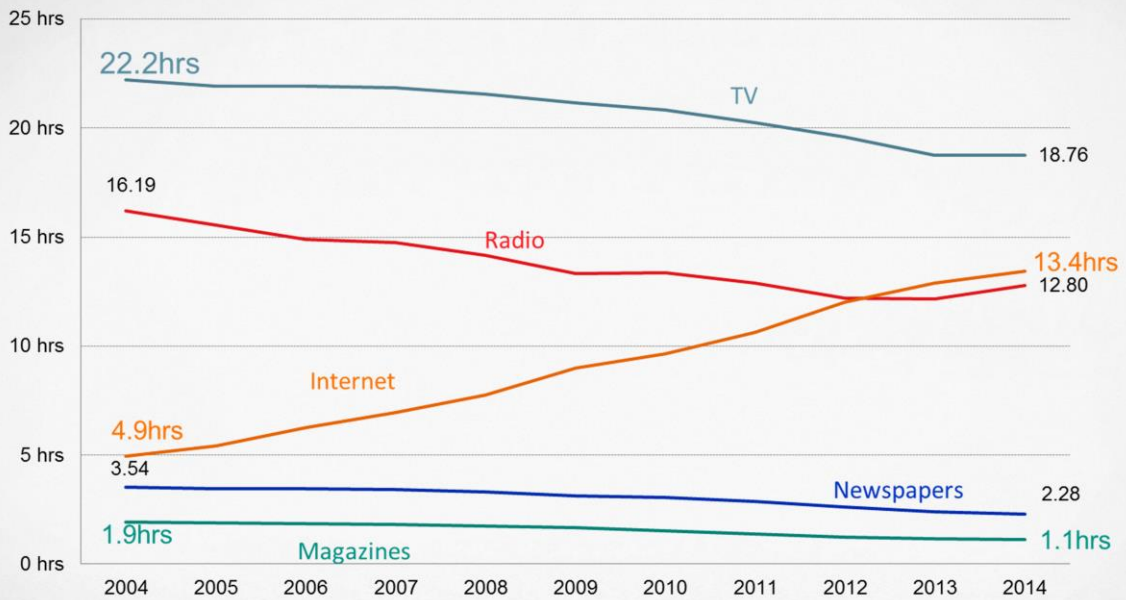


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Just looking at the last decade, the time people spend with any media during the week looks fairly consistent.

Average Time Usually Spent Using Media for Whole Week (hours per week)



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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)

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Streaming

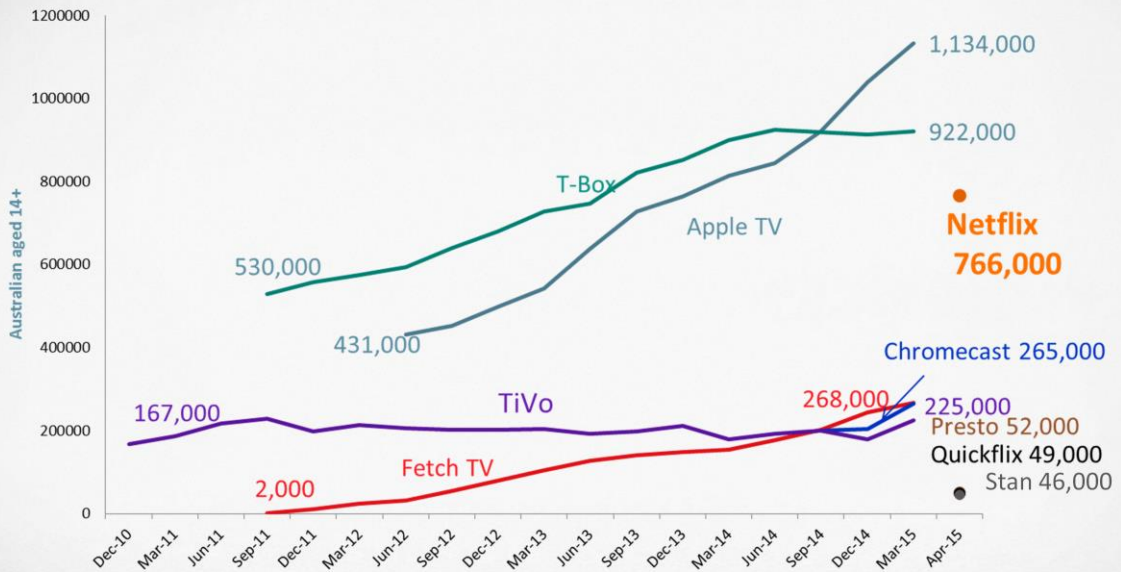
Another game changer for TV

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Streaming is an other game changer.

Audio, video and on demand streaming



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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.

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When I want it!

Media prevalence by time of day

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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%)



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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.

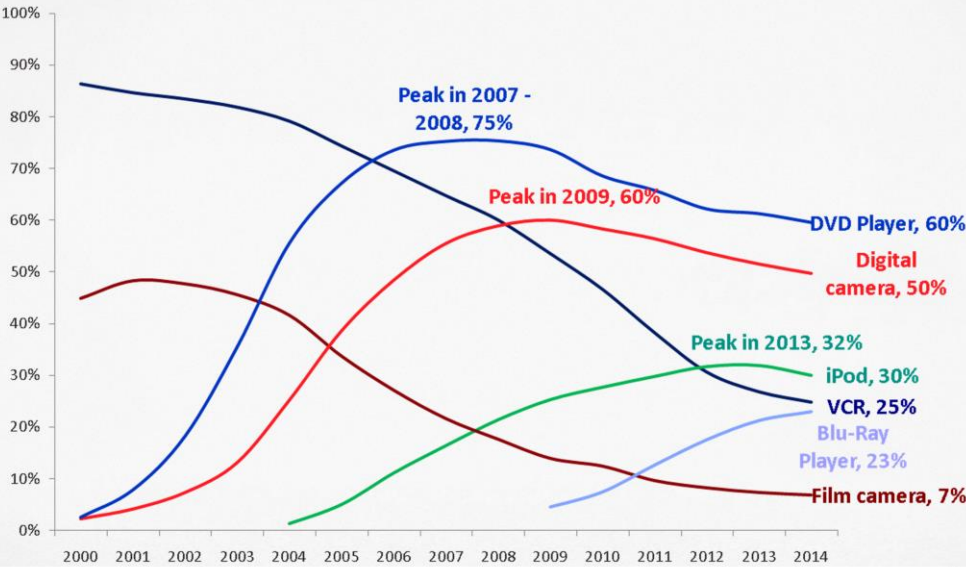
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Technology

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Tech crunch: Aussie households ditch 800,000 DVD players, 500,000 digital cameras and 5.7 million old TVs

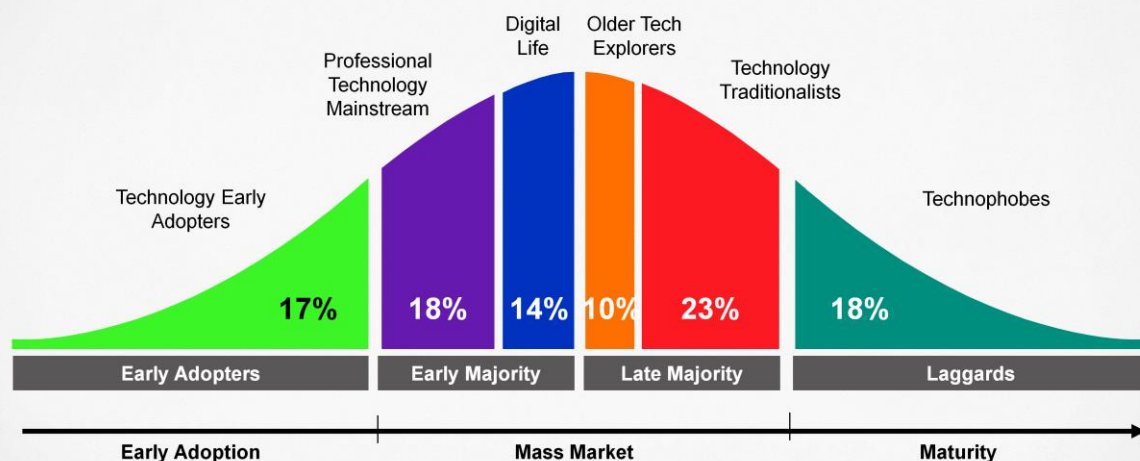


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We have all seen innovations come and go – like the DVD, digital cameras, etc.

Roy Morgan Research Technology Adoption Segments



Base: Australian population aged 14+

Source: Roy Morgan Research; 12 months to December 2014

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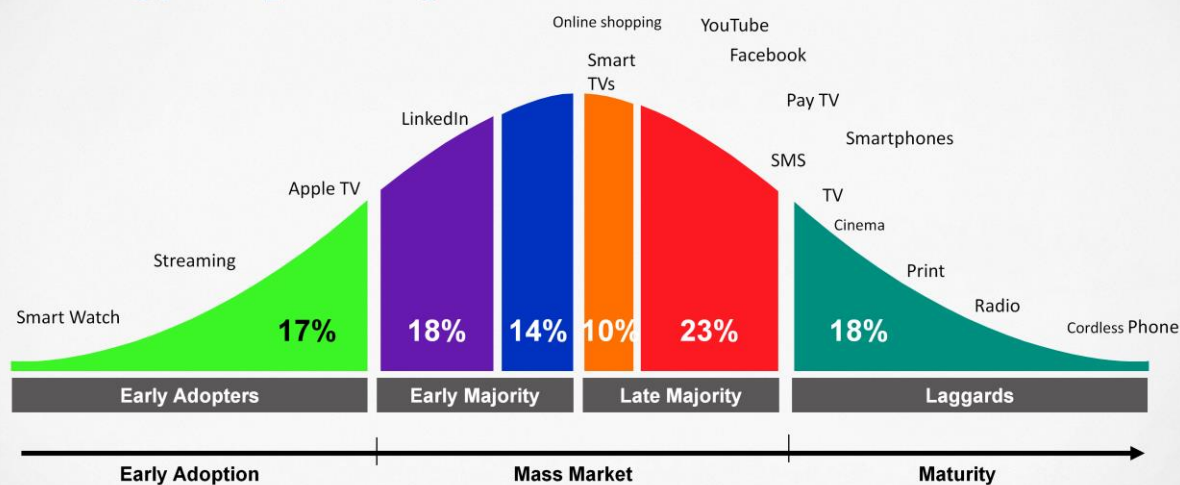
In recognition of the fact that we need to understand the rapid changes in technology and their impact on consumers, Roy Morgan Research undertook a major study of technology and how Australians are adapting to it. The study's results, which were first launched in May 2012, show that different segments 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.

Roy Morgan Research Technology Adoption Segments



Base: Australian population aged 14+
Source: Roy Morgan Research; 12 months to December 2014

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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.

Is this your target market?

Heavy Facebook Users – Top Movies/Genres

Top 10 movies seen 2014, 2015 releases (high reach and high index)



23% more likely to have seen an
Action/Adventure movie

14% more likely to have seen a
Comedy movie

41% more likely to have seen a
Sci-Fi movie

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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?

Is this your target market?

Heavy YouTube Users – Top TV Programs

Top 10 commercial TV shows especially choose to watch (high reach and high index)



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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.

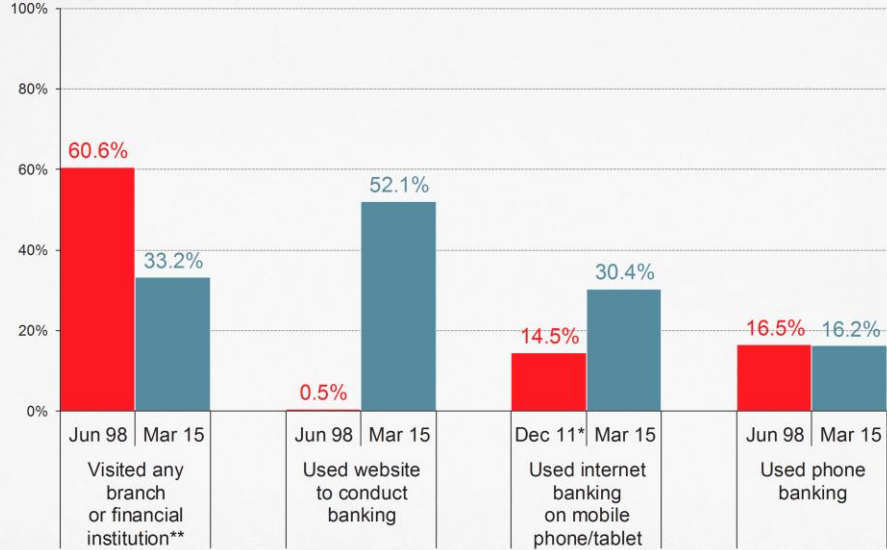
Finance

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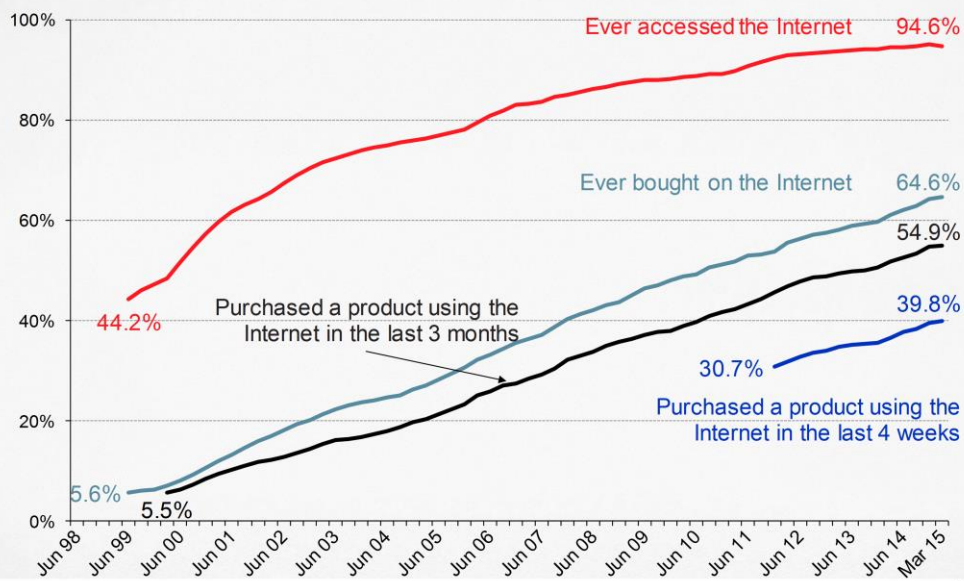
Major Banking Channels

(used in the last four weeks)



*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

Used or Purchased on the Internet



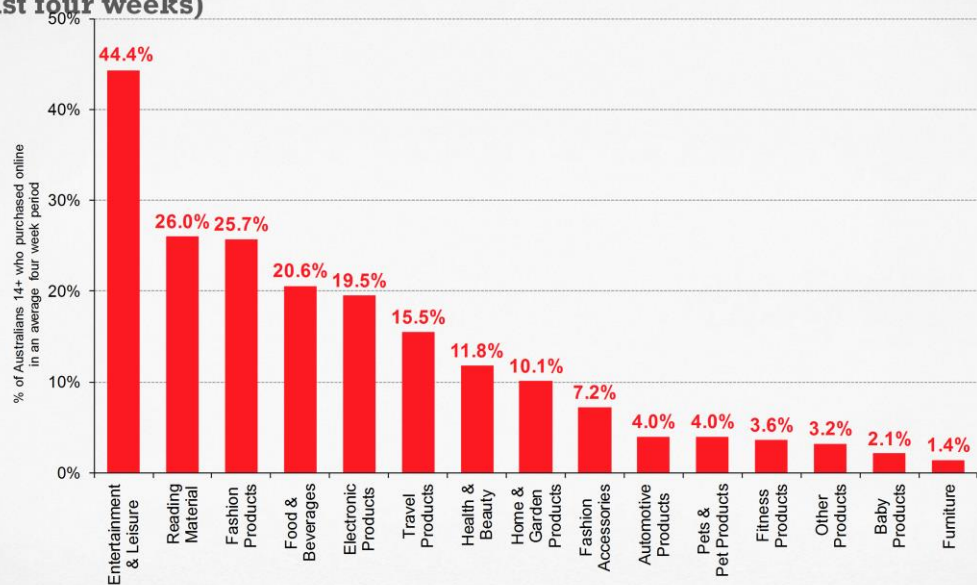
Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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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

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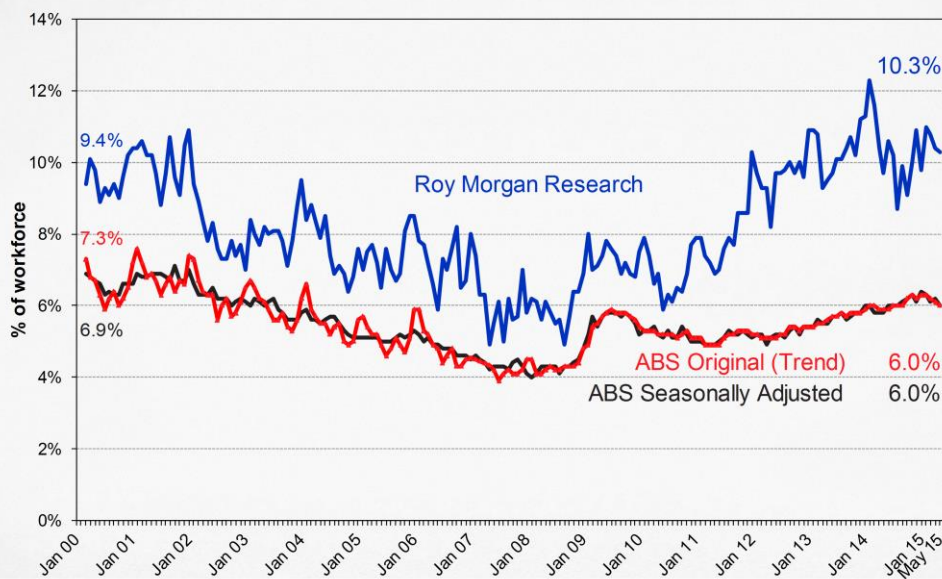
Economy

The Key Areas of Change

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Level of Workforce Unemployment

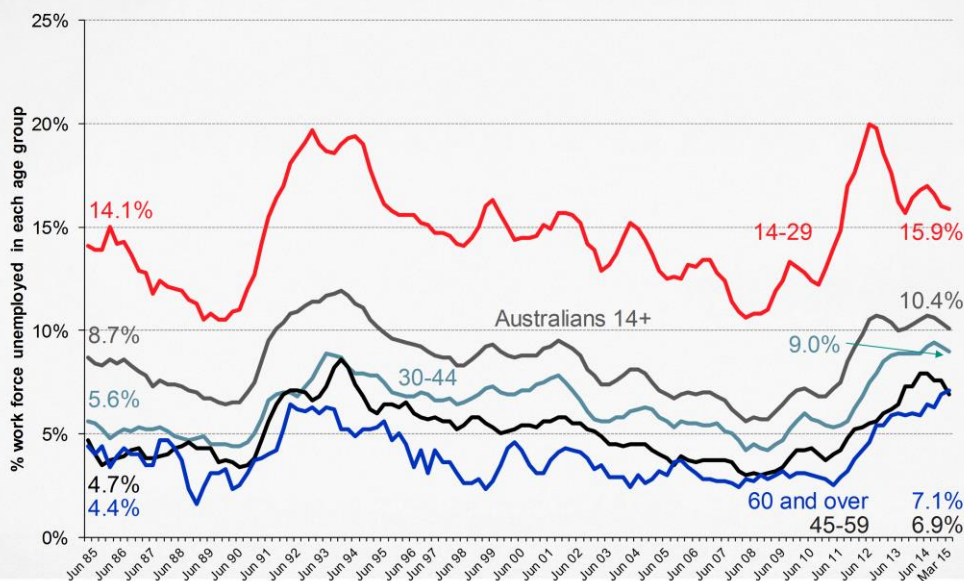


Source: Roy Morgan Research; Monthly data
Source: Australian Bureau of Statistics; Monthly data

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Unemployment by Age

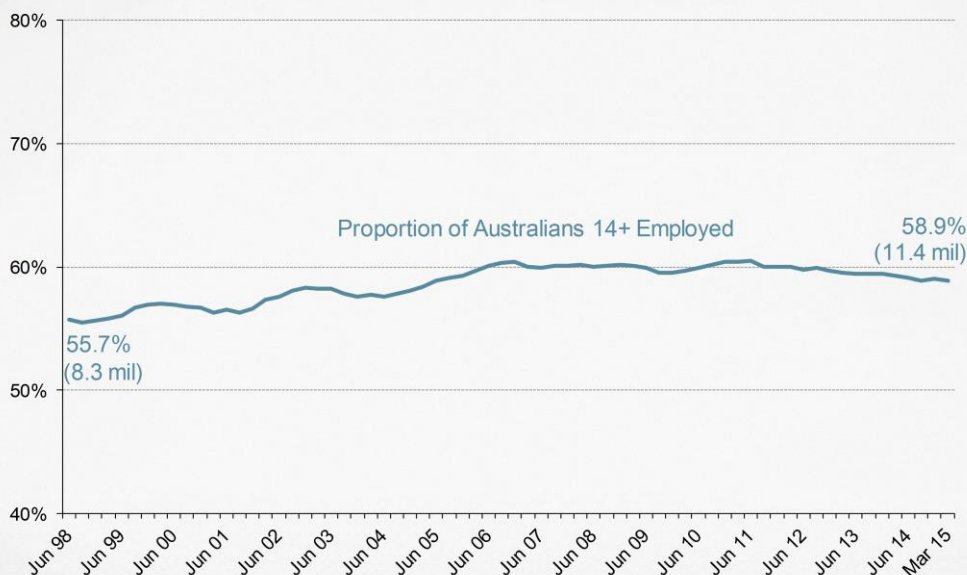


Base: Australians in the workforce aged 14+
Source: Roy Morgan Research; 12 month moving average

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Australians in Employment



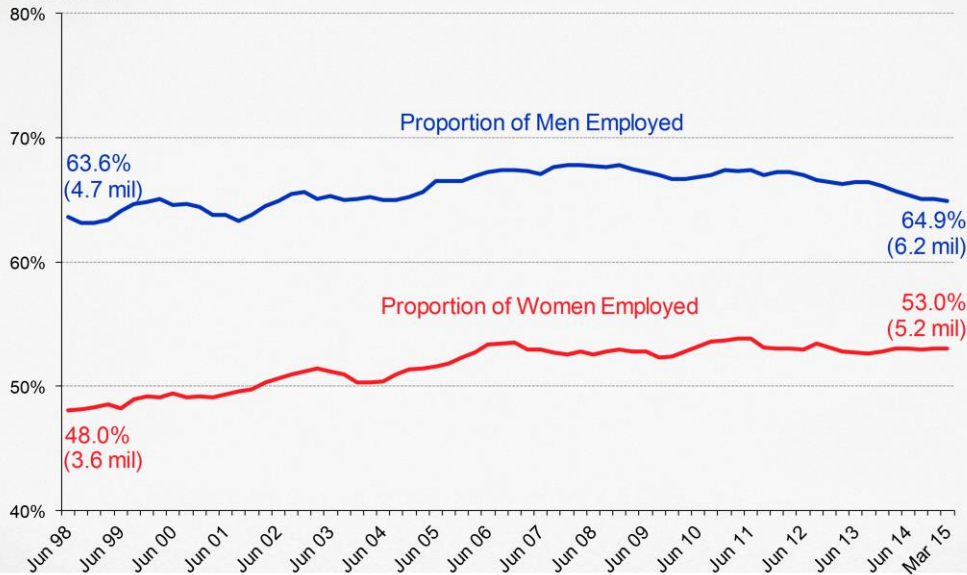
Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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Australians in Employment

- Men vs. Women



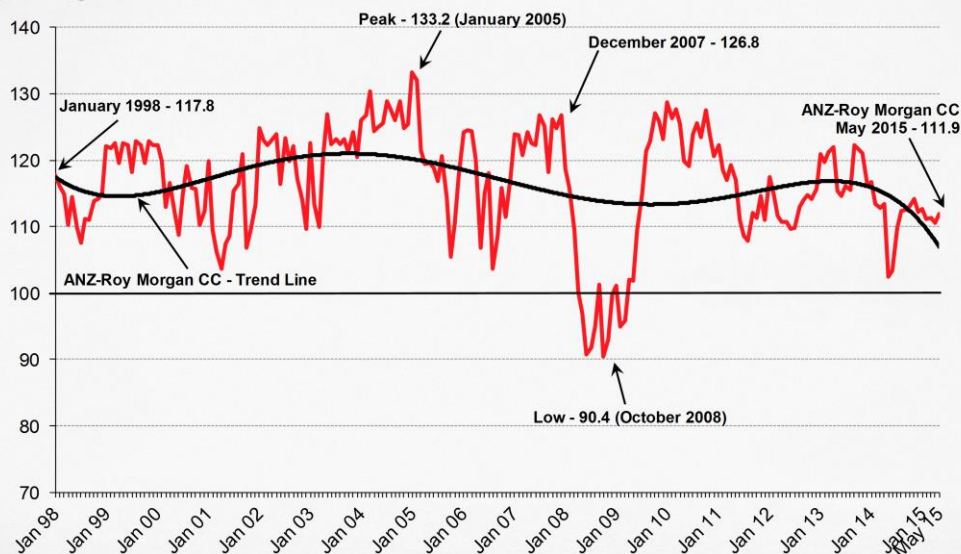
Base: Australian population aged 14+
Source: Roy Morgan Research; 12 month moving average

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ANZ-Roy Morgan Consumer Confidence

- Monthly Long-Term Trend



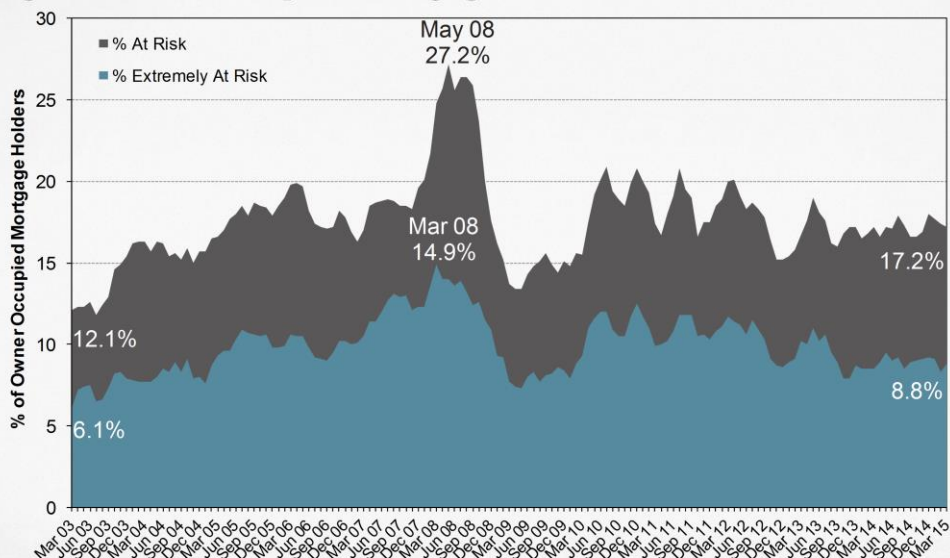
Base: Australian population aged 14+
Source: Roy Morgan Research; Monthly data

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Mortgage Stress

- Percentage of Owner Occupied Mortgage Holders 'At Risk'



Base: Australian population aged 14+ who have a mortgage on the home they are living in
Source: Roy Morgan Research; 3 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.

Interviewer Conference

Roy Morgan Matters

October 2015

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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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