

# STATE OF THE NATION

## Australia

### Report 6 – October 2010

**A Roy Morgan Research – Mutual Trust Function**

**October 29, 2010**

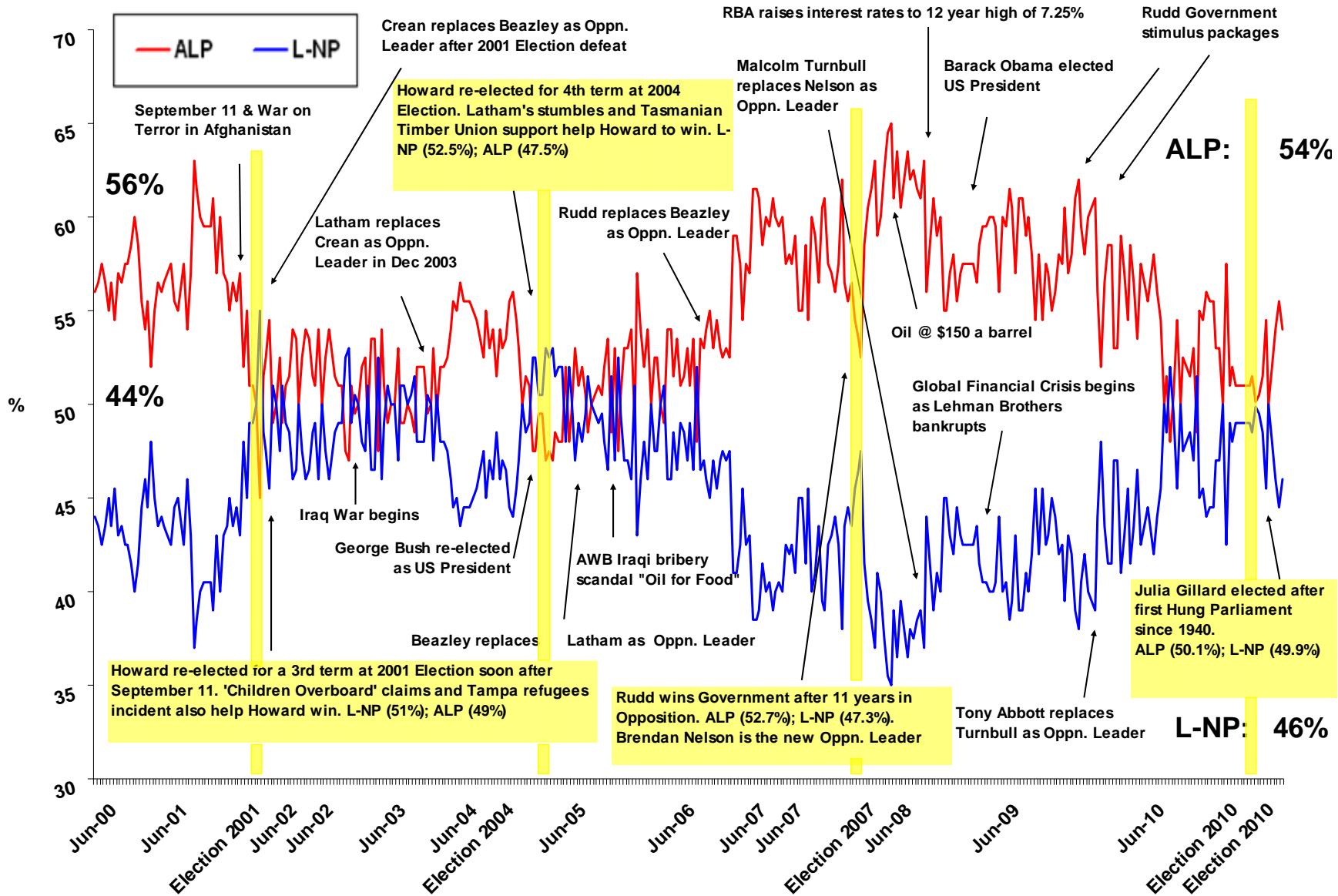
## *What worries you about a Prime Minister?*

- *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%**

# POLITICS

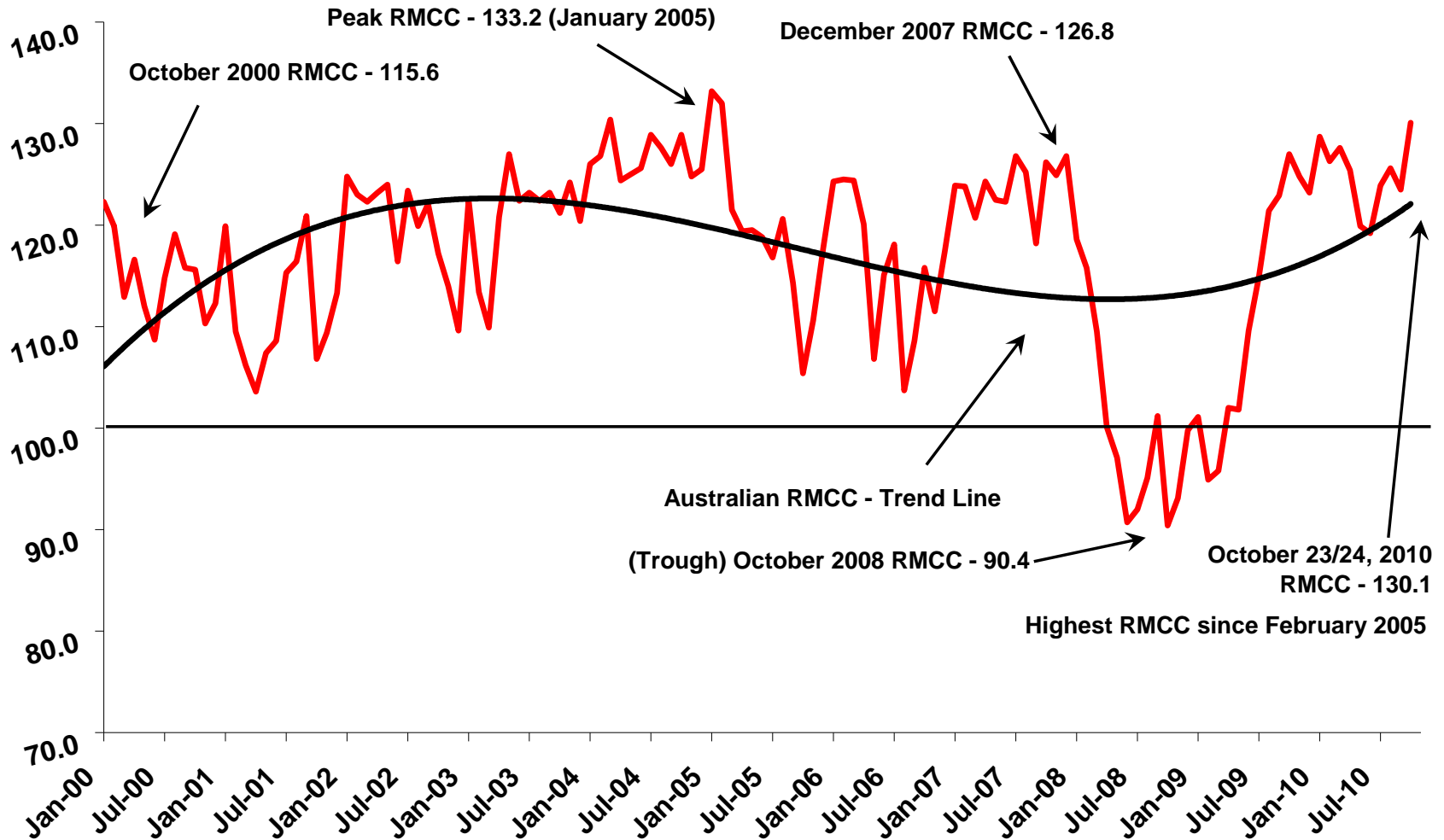
## Federal: Two-Party Preferred

Discover your edge



# ECONOMY

## Roy Morgan Consumer Confidence – Long Term Trend



# The Economic Issues – An Overview

**Peter Demura**

**DDM Capital Ltd.**

“Today, Australians see economic issues (33%) and environmental issues (29%) as clearly the most important problems facing the world....”, ***State of the Nation, Report 6***

# ***State of the Nation Report - Global Interconnectedness***

## **China** – Carefully Managed Transition

- 5 Year Plan – rebalancing & sharing prosperity
- Geo-political tensions unhelpful
- Long-term benefits for Australia

## **US\*** – More than QE II and weak dollar

- Balance sheet recession
- Long adjustment period – growth <2.5% pa
- QE II – likelihood of weaker USD and higher asset & commodity prices

## **Australia** – Strong Fundamentals

- Supported economy through GFC
- Housing - pivotal role
- \$A, commodity prices, geo-economic shock

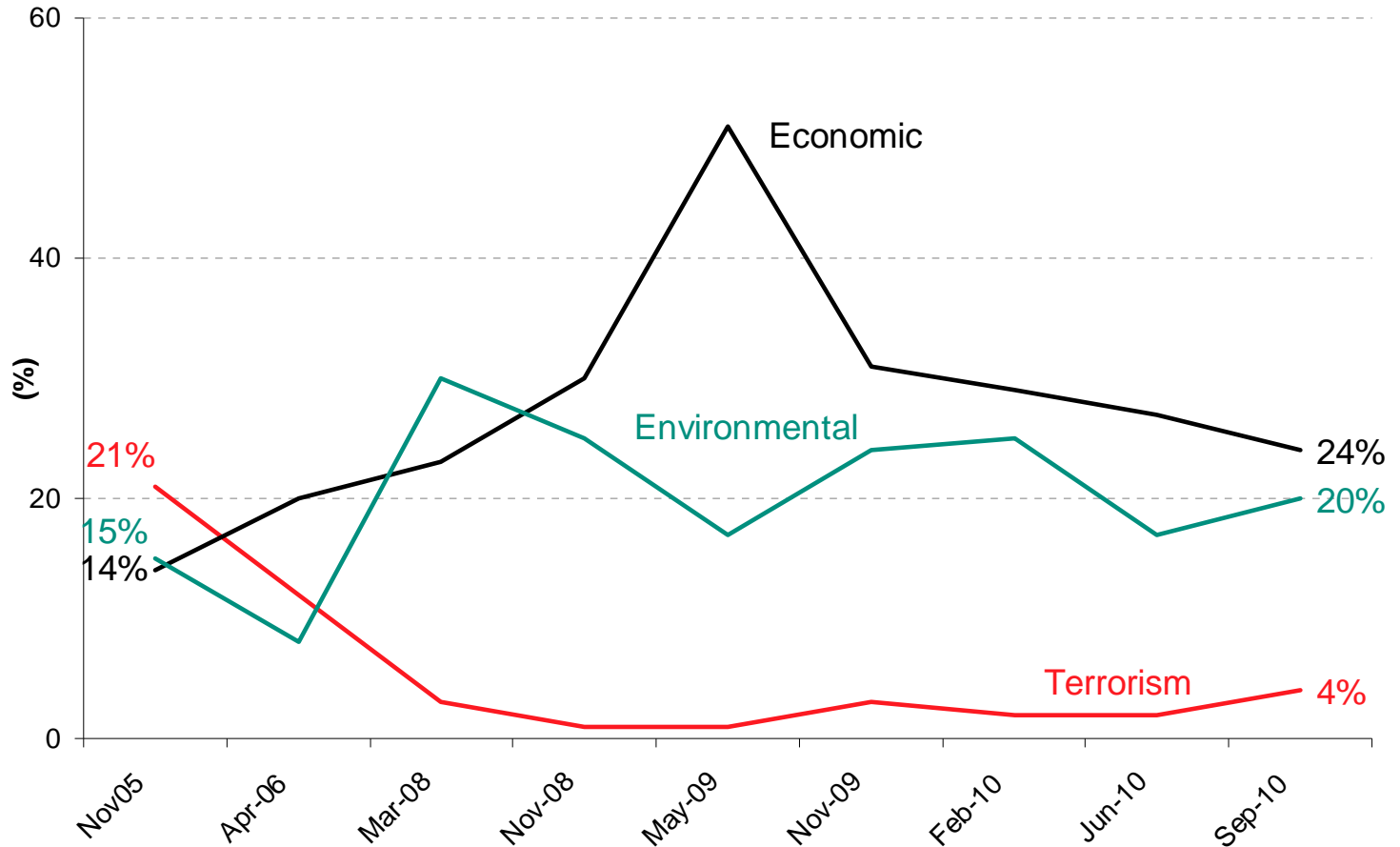
## ***Emerging Issues***

- *State Capitalism – increased involvement of Governments in the free market*
- *Resource nationalism, including tax and equity*
- *Increased regulation – especially financial sector*
- *Debt and Leverage – new conservatism will question business models*
- *Environment and climate change will be at the forefront of people's minds – whether in terms of abatement actions or the increased costs e.g. power*
- *Technology, in particular broadband, will push boundaries and create new opportunities*



# Issues Facing the World and Australia

## Most Important Issues Facing Australia



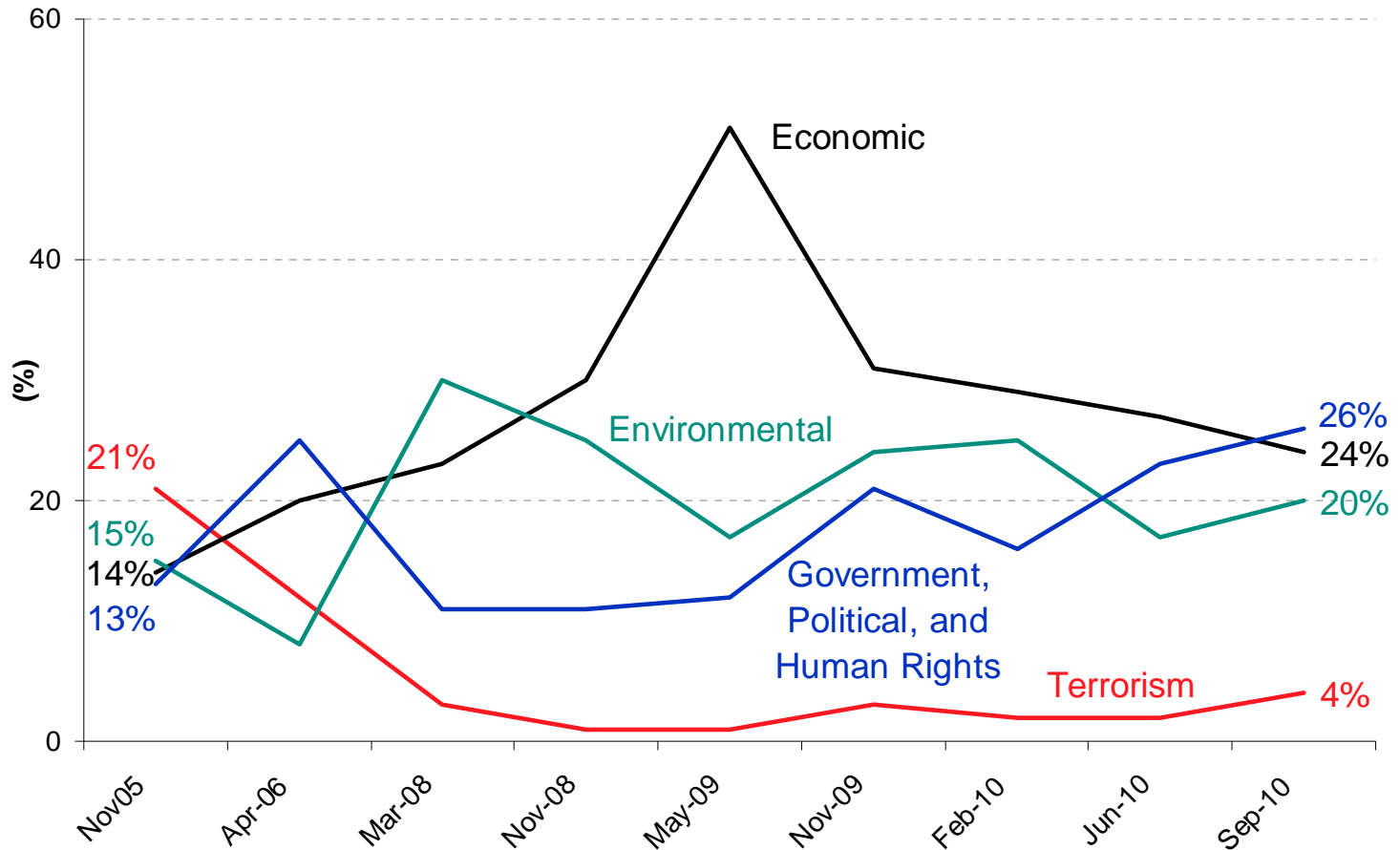
Source: Roy Morgan Research

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



# 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+

## Key Areas of Change

**S**ociety .....

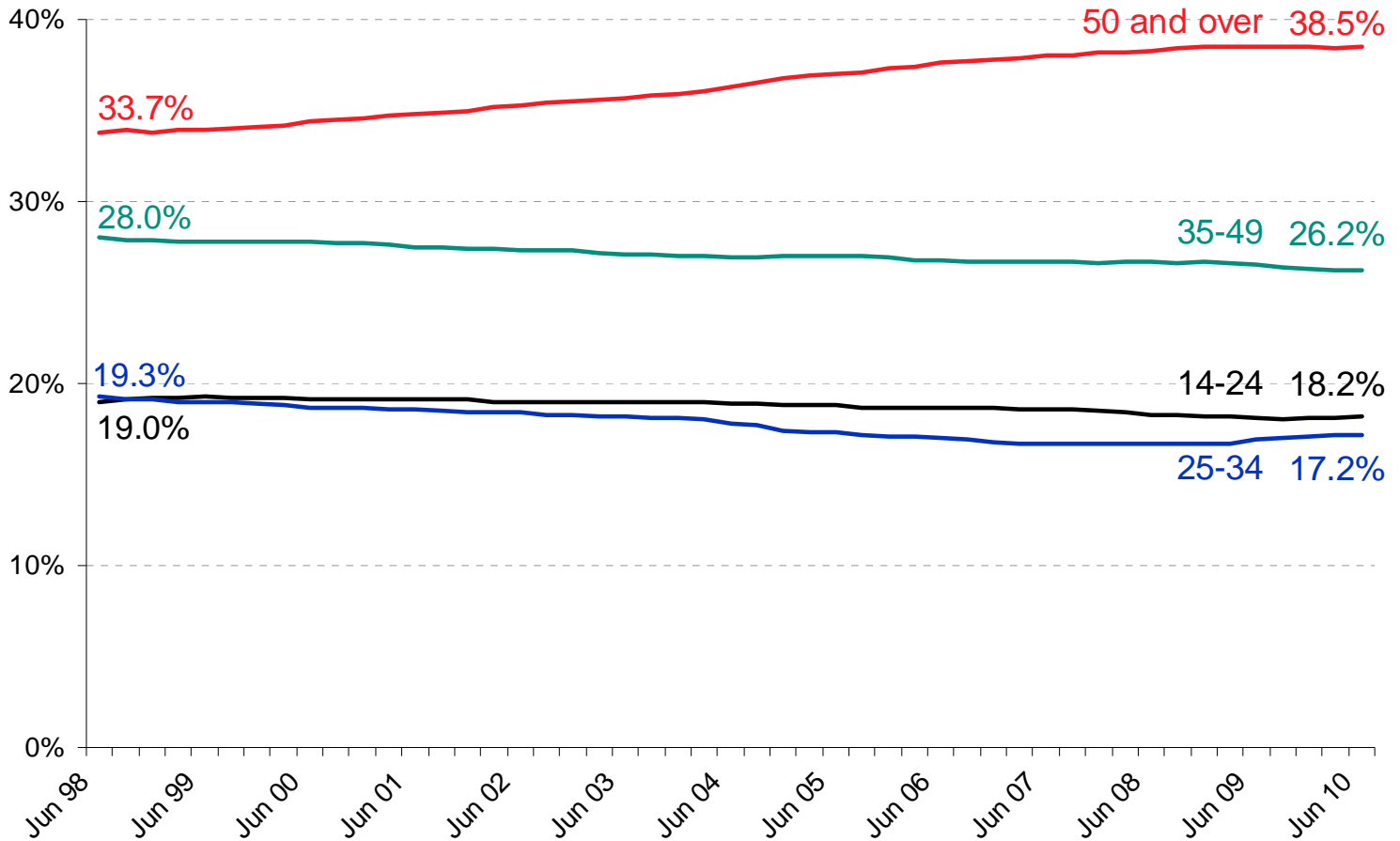
**T**echnology .....

**E**conomy .....

**P**olitical .....

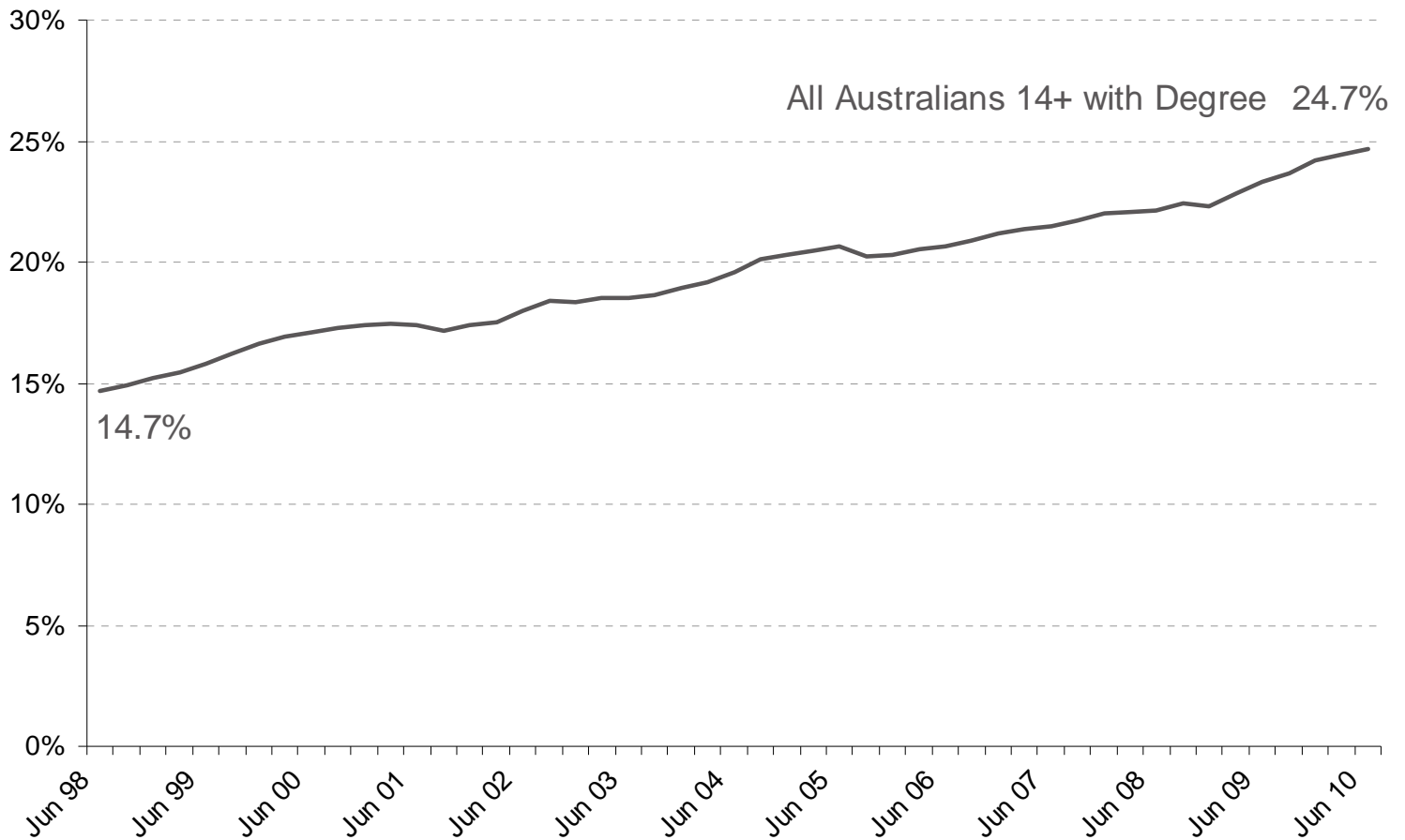
**E**nvironment .....

# SOCIETY Age Groups



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

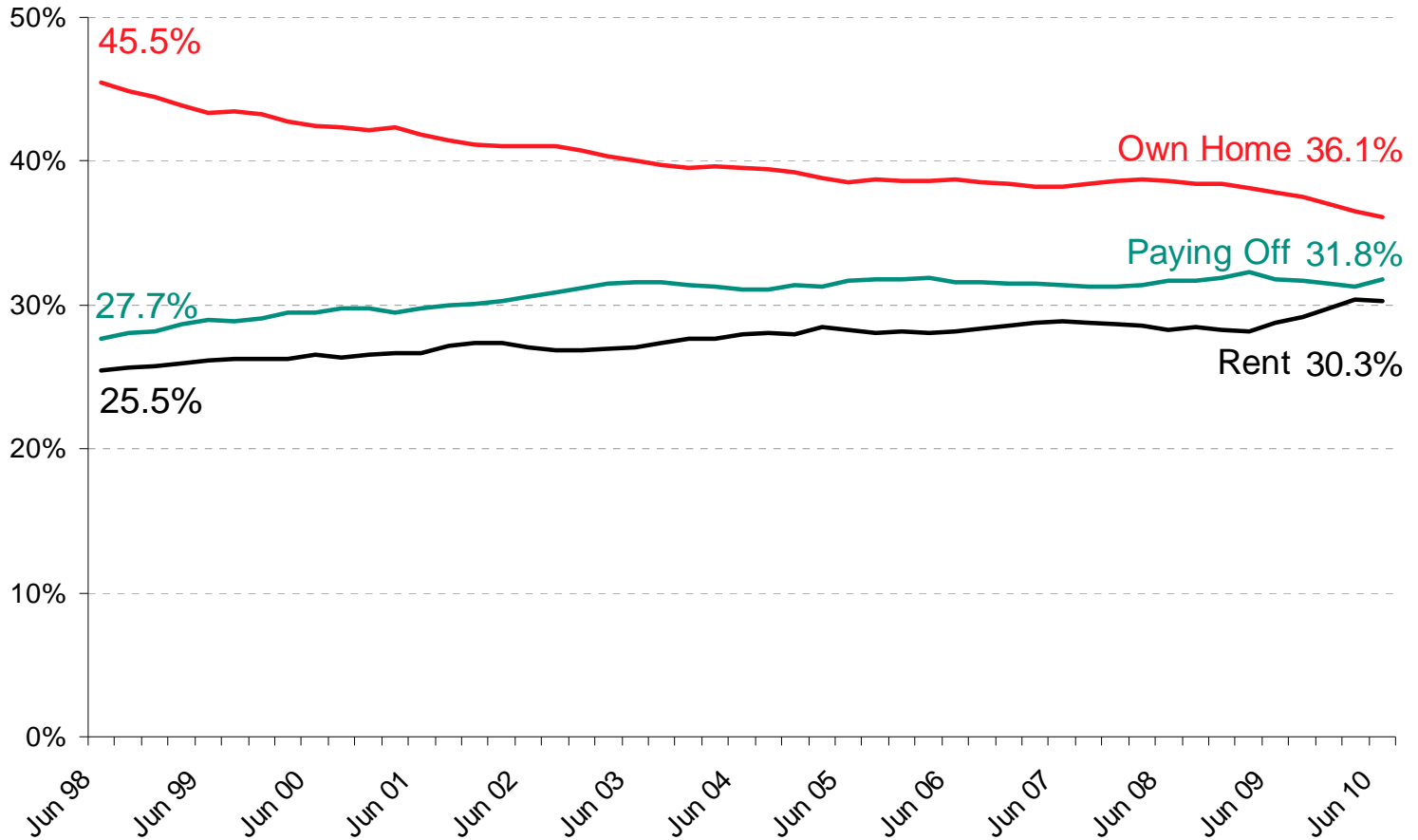
# SOCIETY Have a Degree



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

# SOCIETY

## Home Ownership

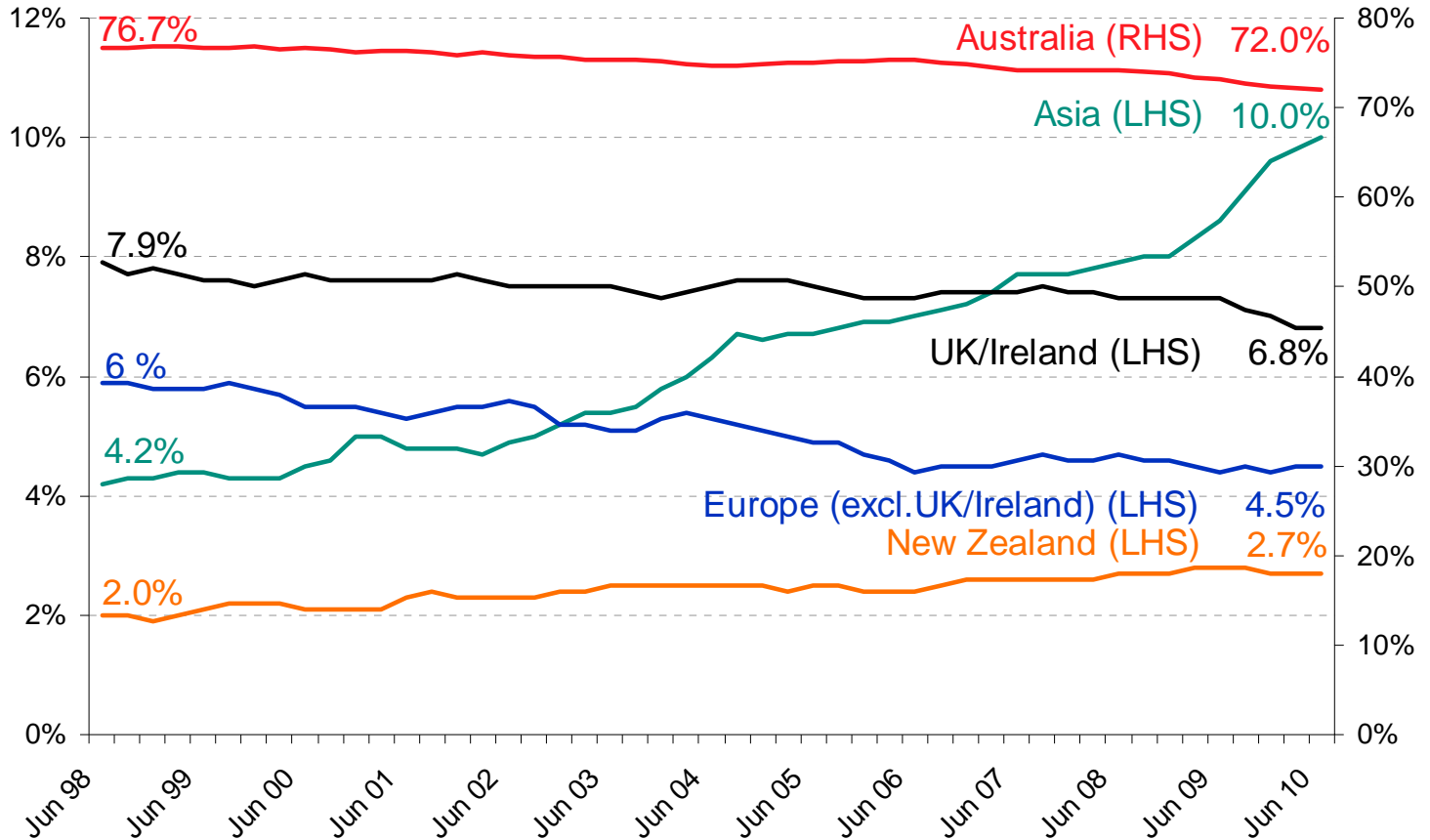


\*Approximately 2% can't say

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

# SOCIETY

## Country of Birth

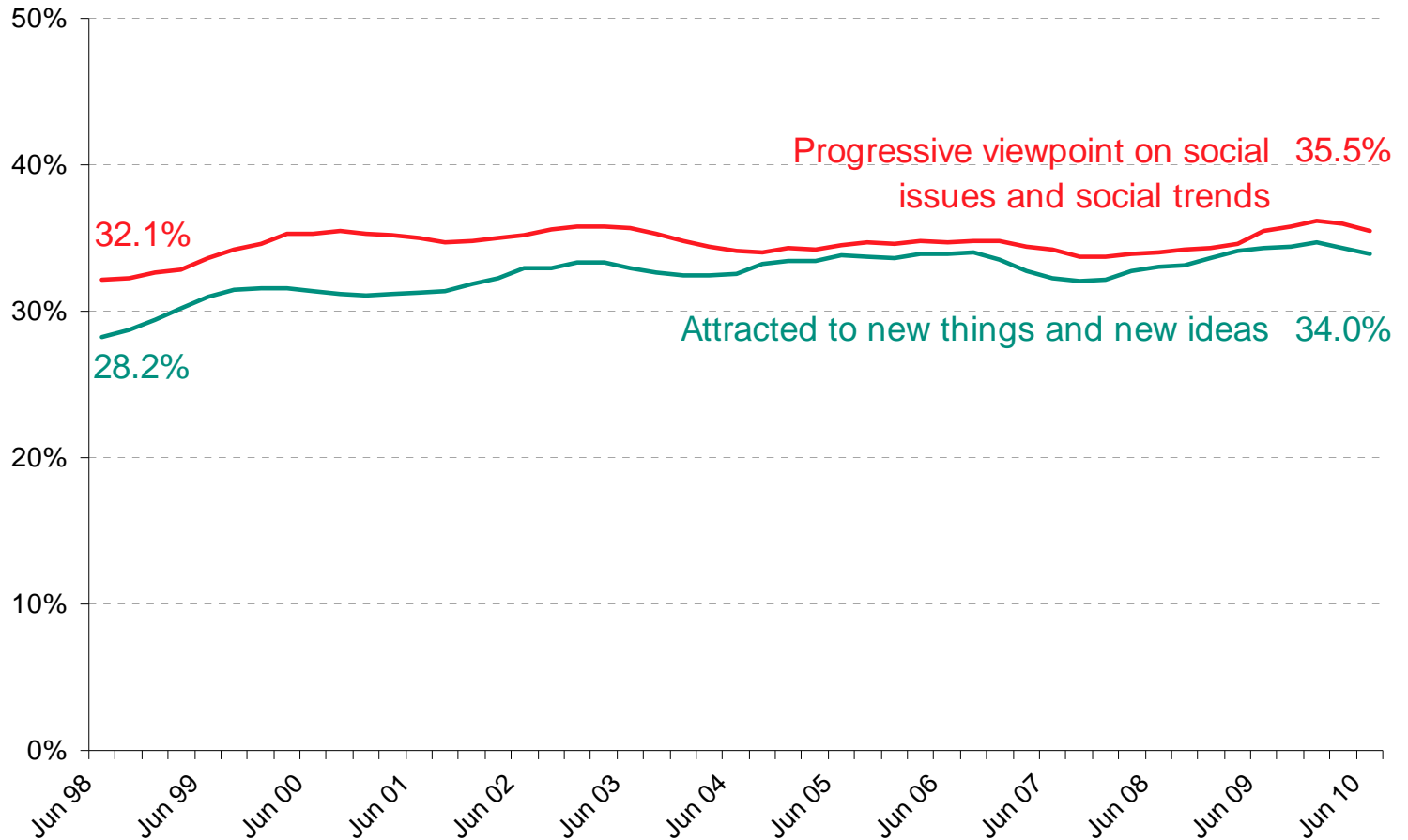


Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

Discover your edge

# SOCIETY

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

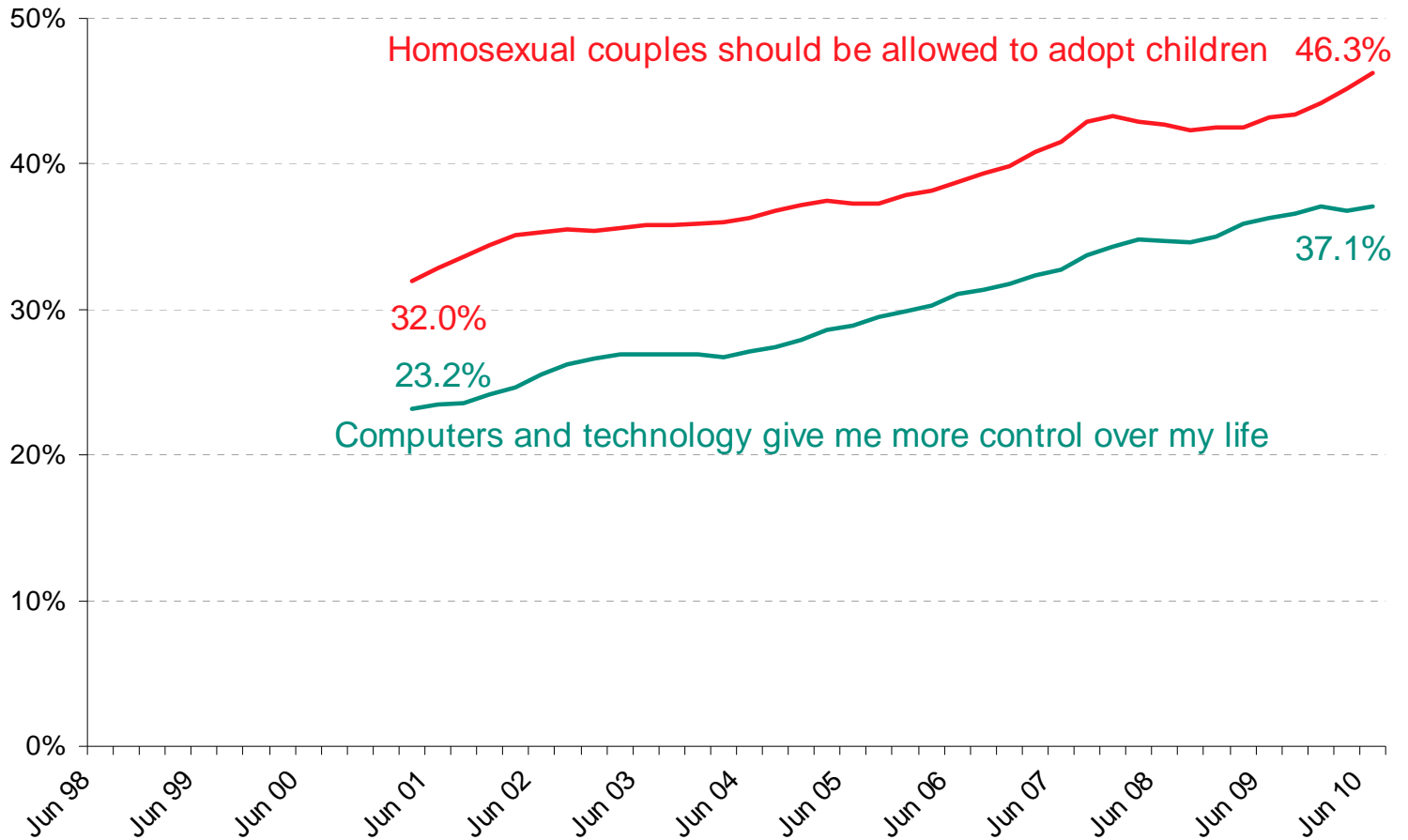


Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.



# SOCIETY

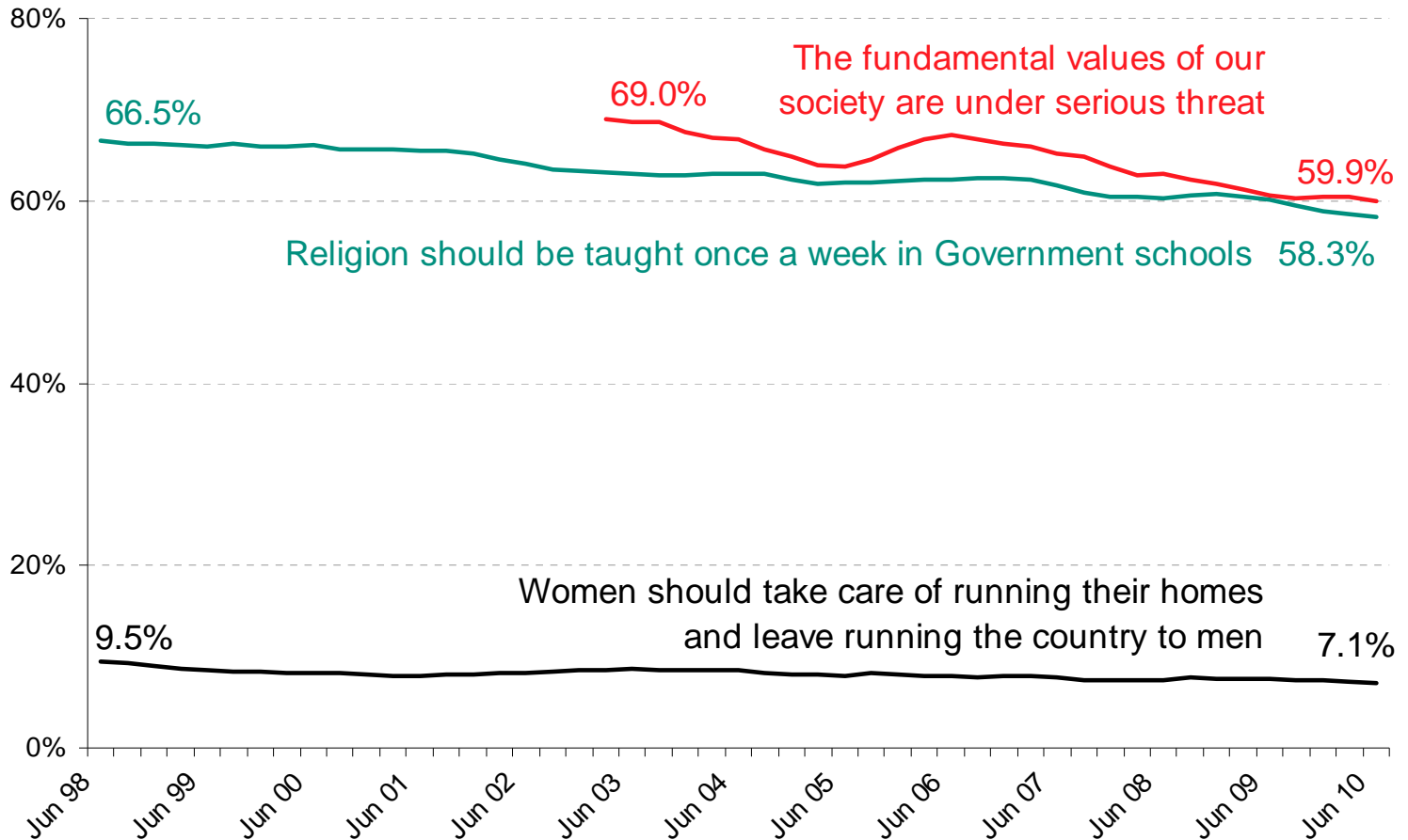
## Progressive Attitudes



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

# SOCIETY

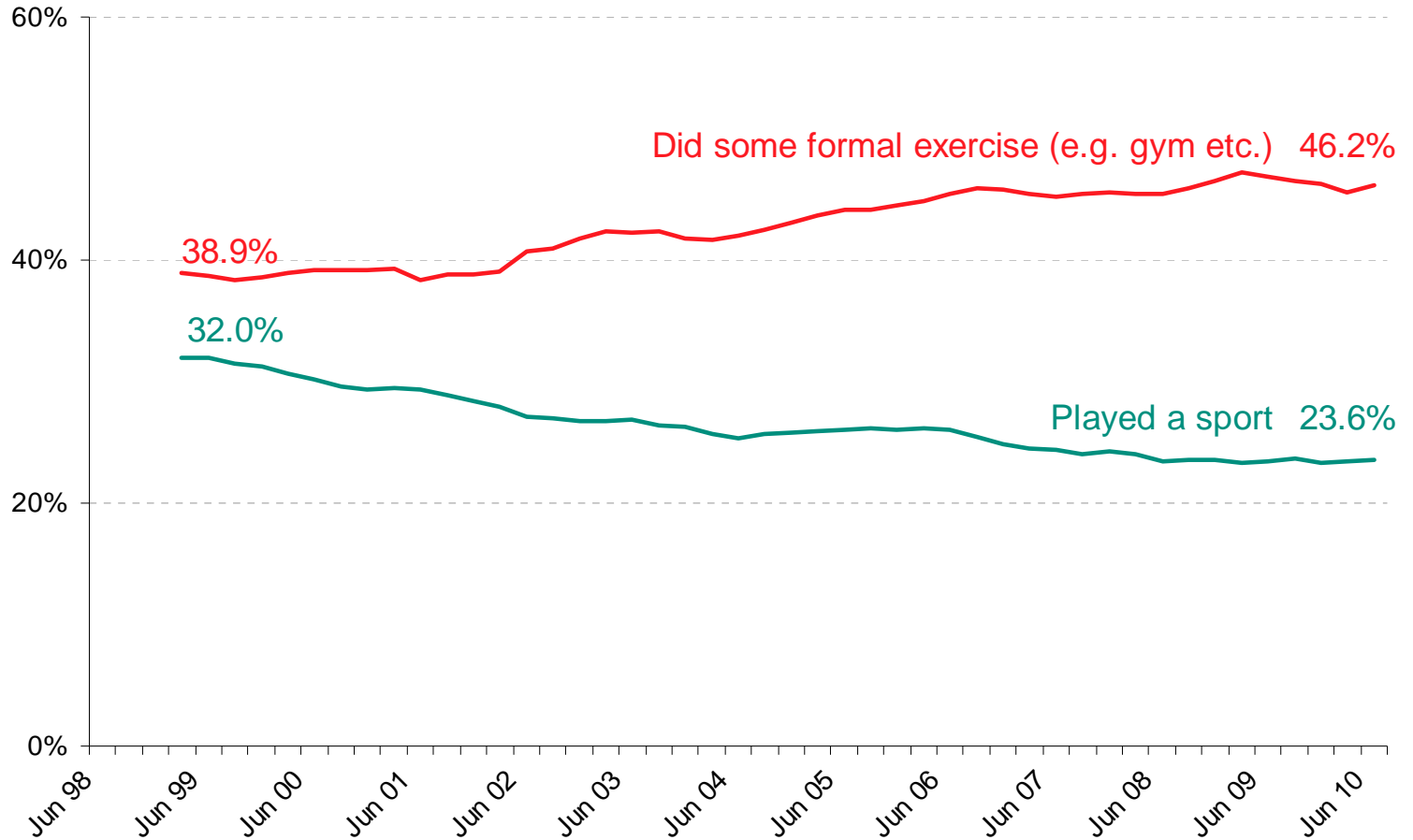
## Conservative Attitudes Declining



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

# SOCIETY

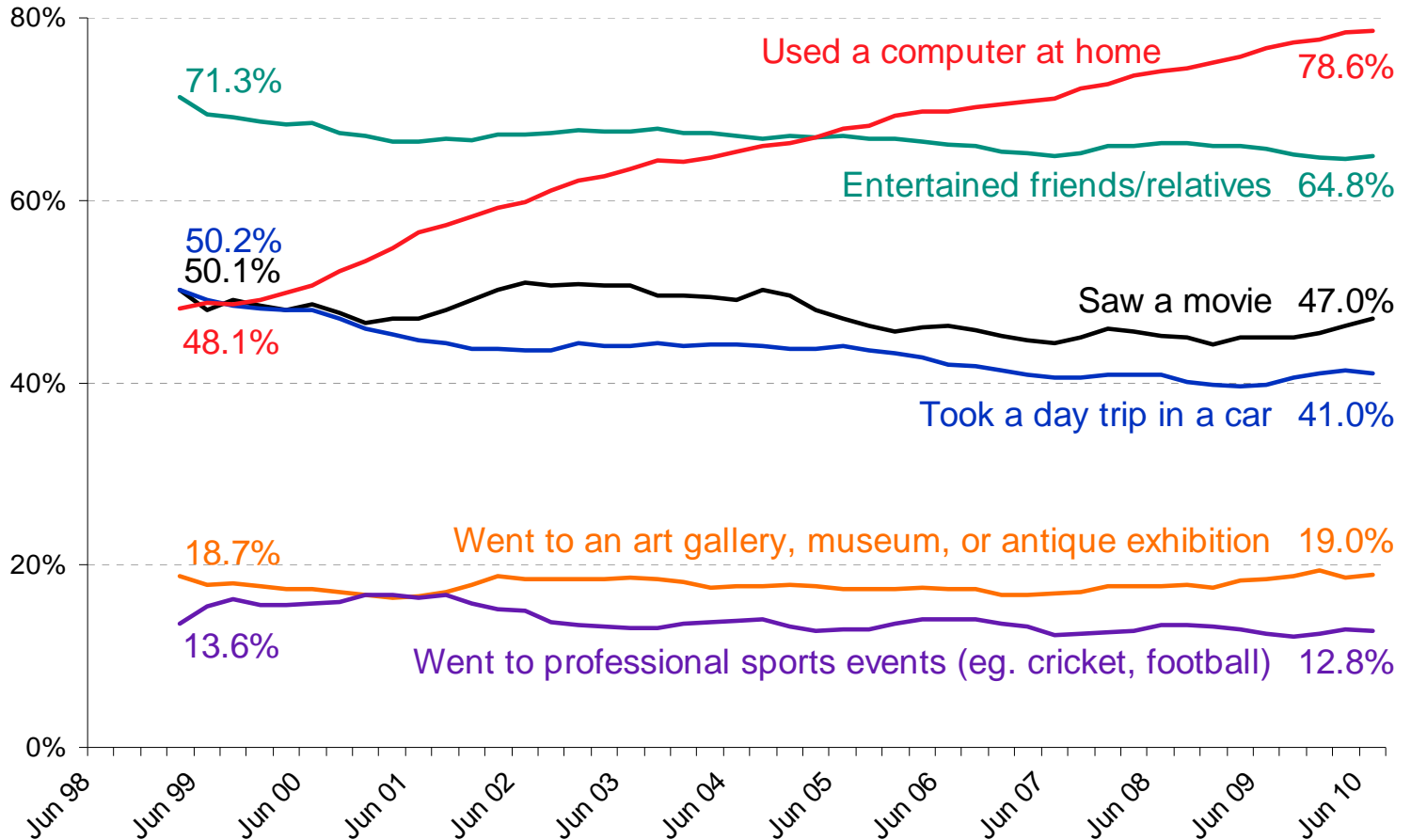
## Participation in Sport/Exercise



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

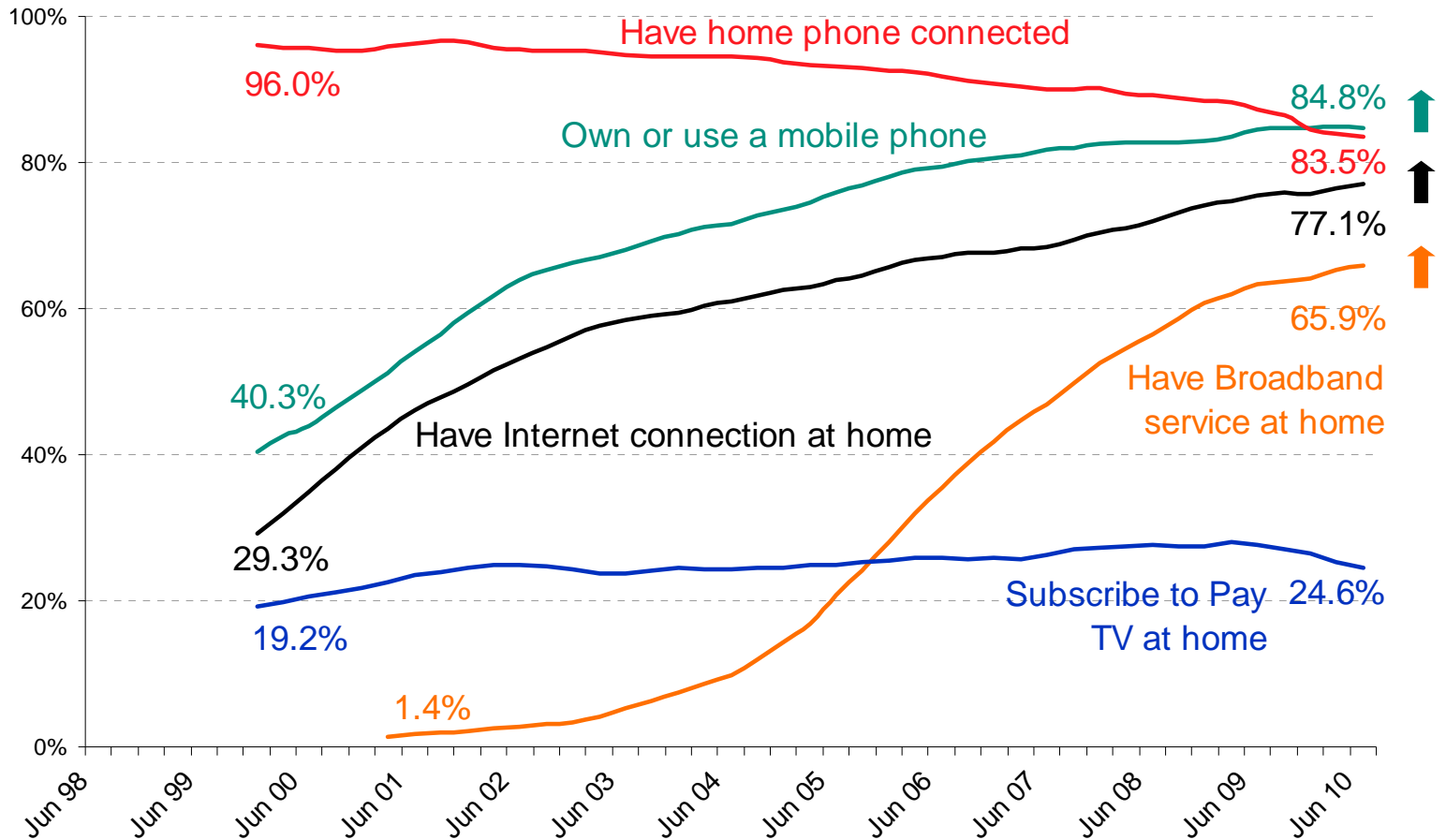
# SOCIETY

## Participation in Other Leisure Activities



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

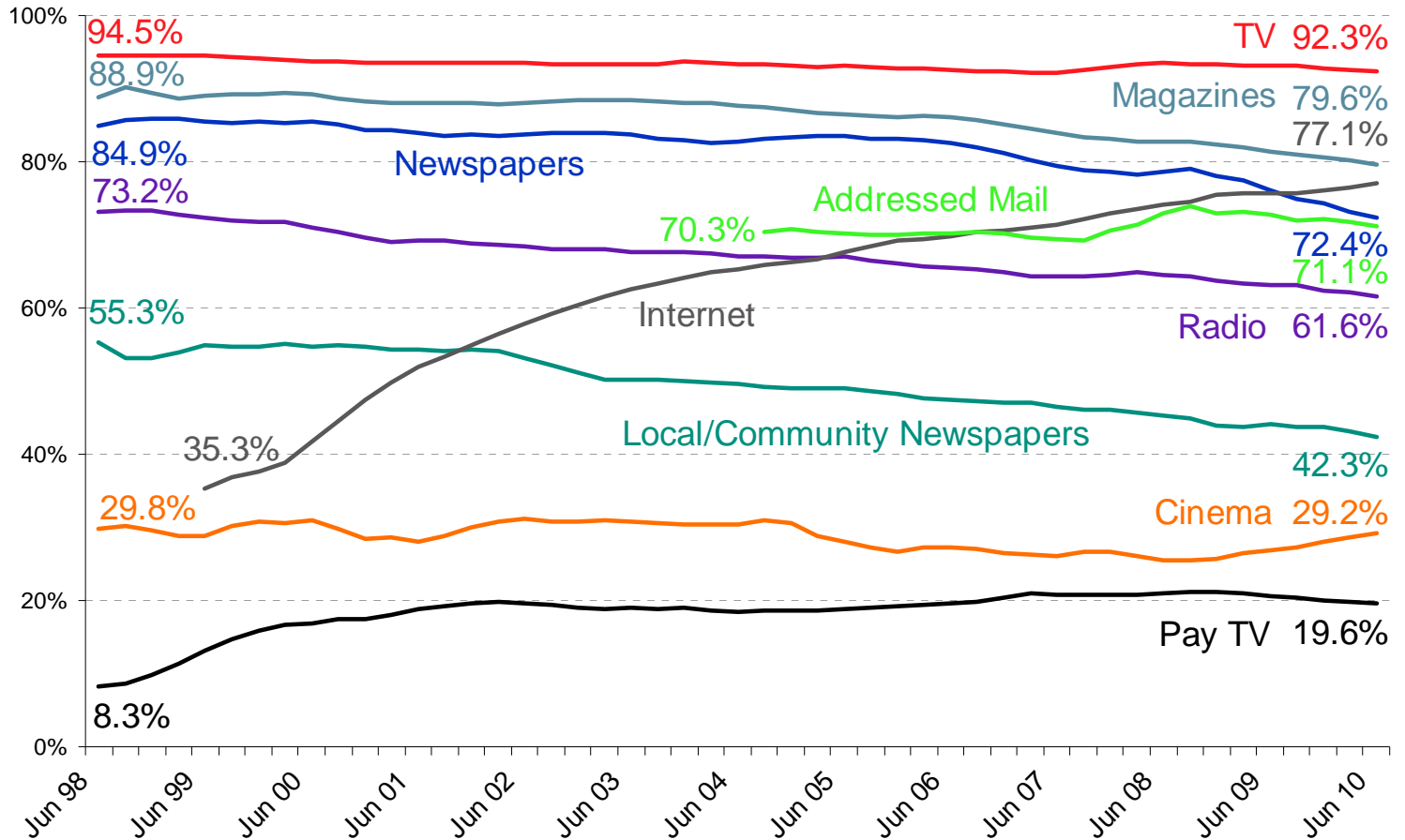
# TECHNOLOGY Telecommunications



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

# TECHNOLOGY

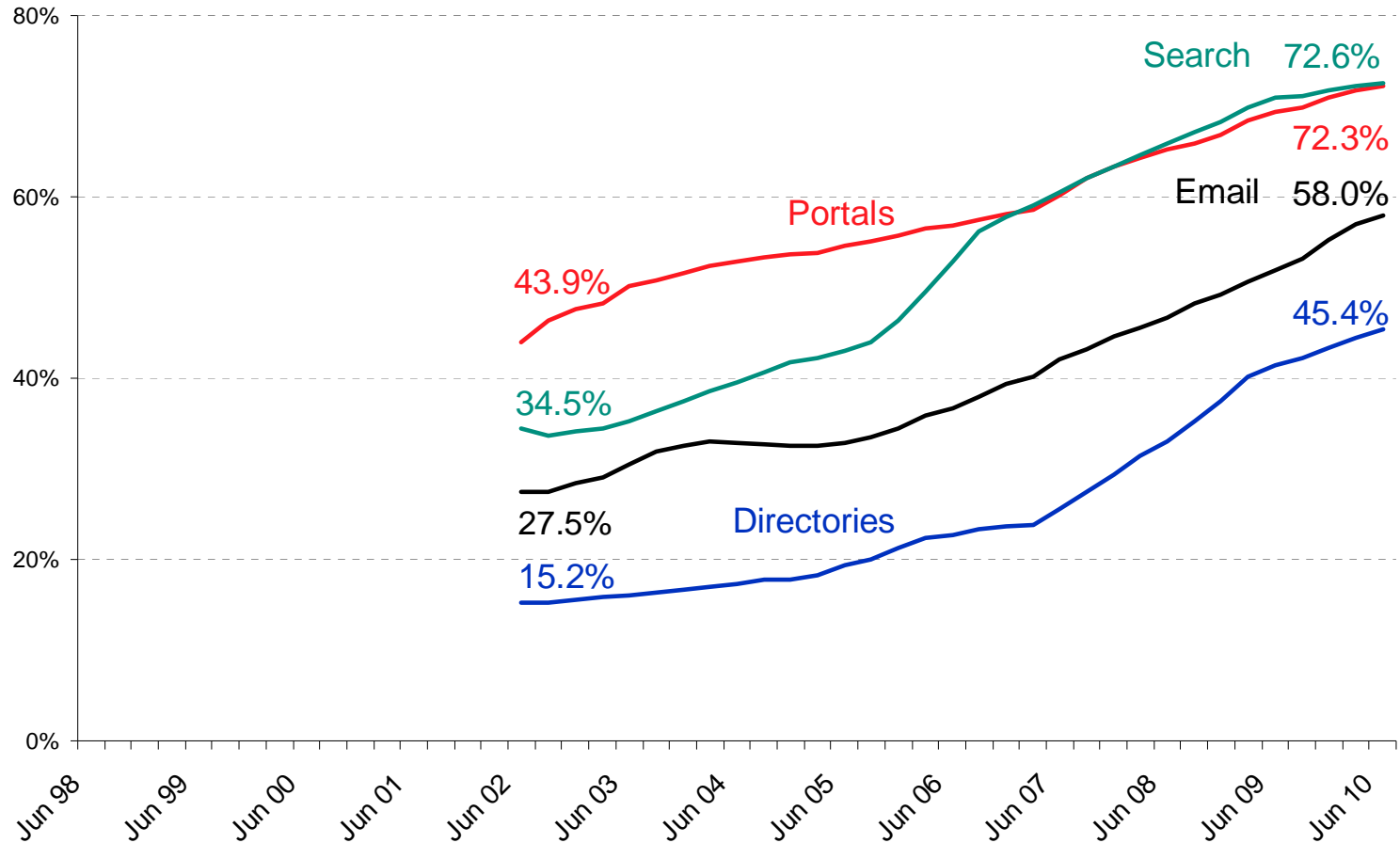
## Use of Major Media Types



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

# TECHNOLOGY

## Visited Traditional Website in Last 4 Weeks

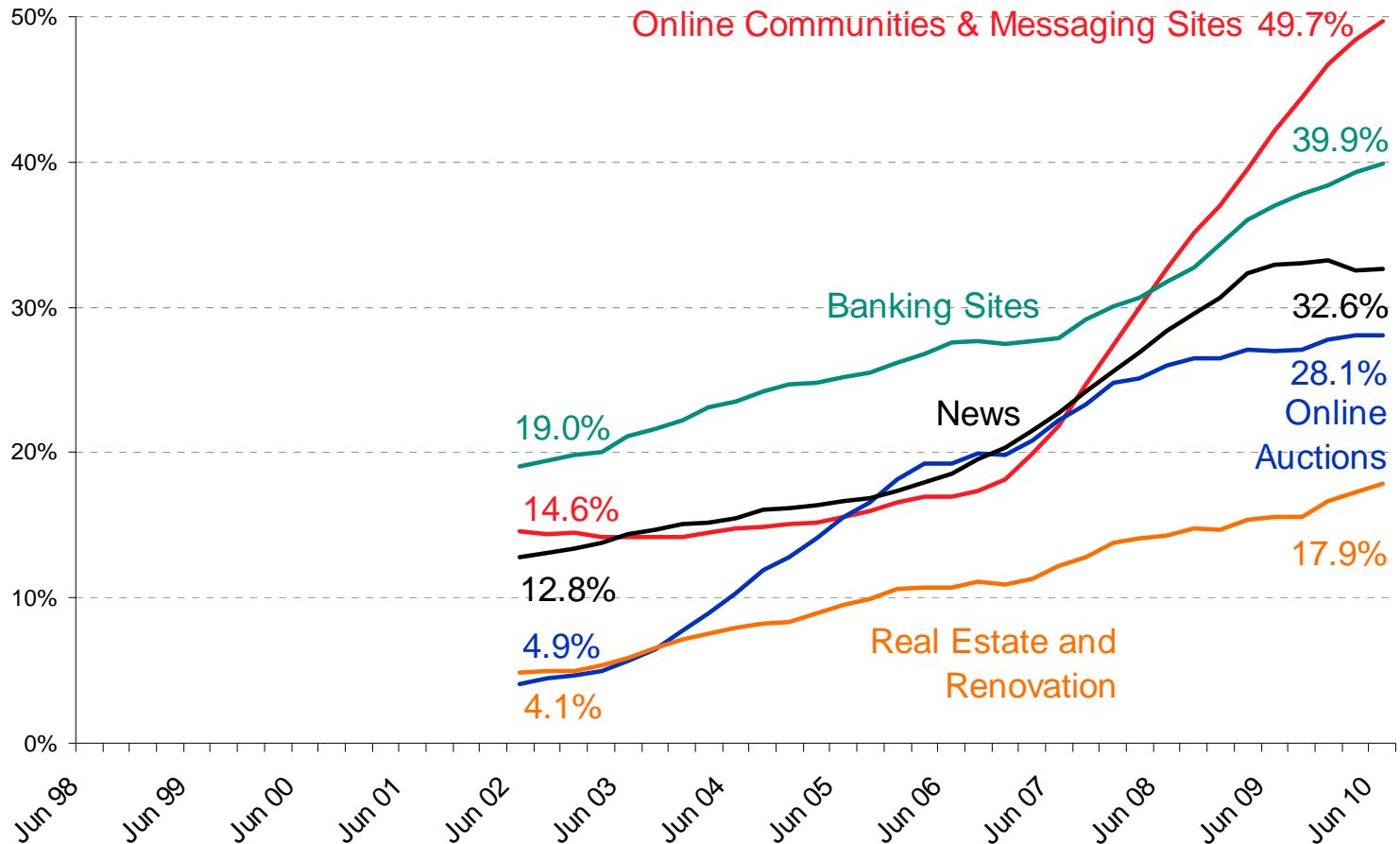


Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.



# TECHNOLOGY

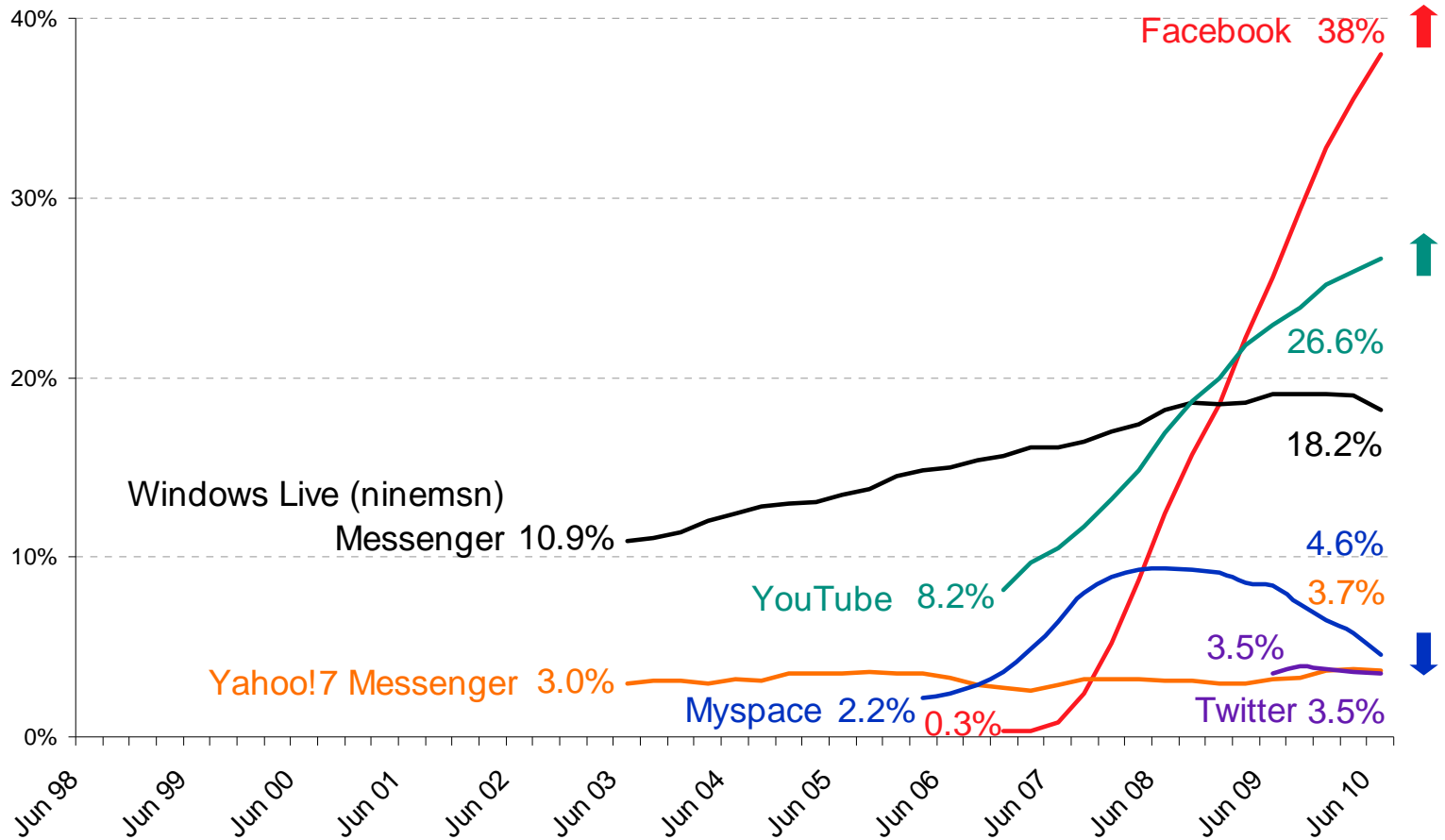
## Visited Commercial and Community Website in Last 4 Weeks



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

# TECHNOLOGY

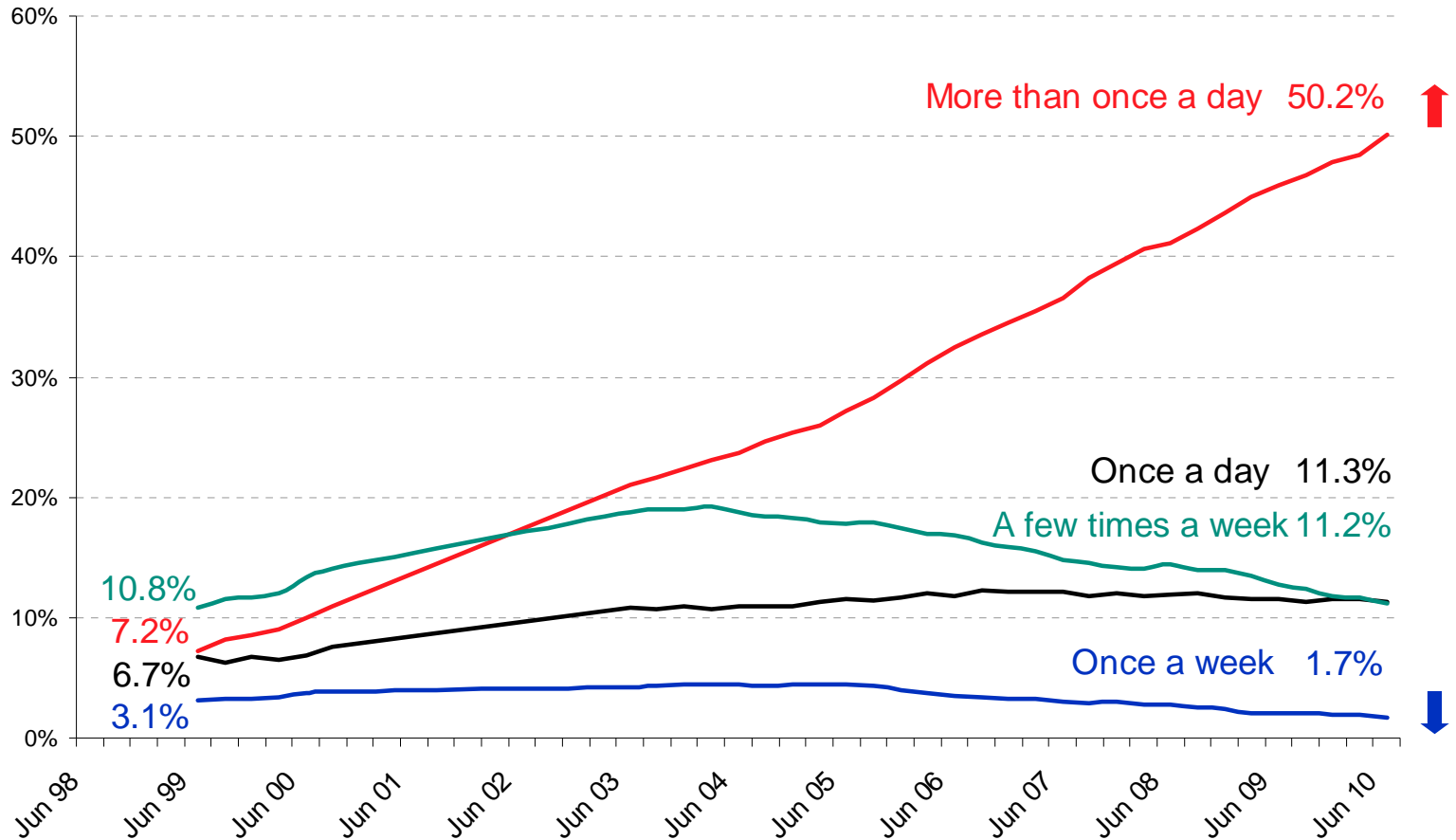
## Online Community or Messaging Website Visited in Last 4 Weeks



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

# TECHNOLOGY

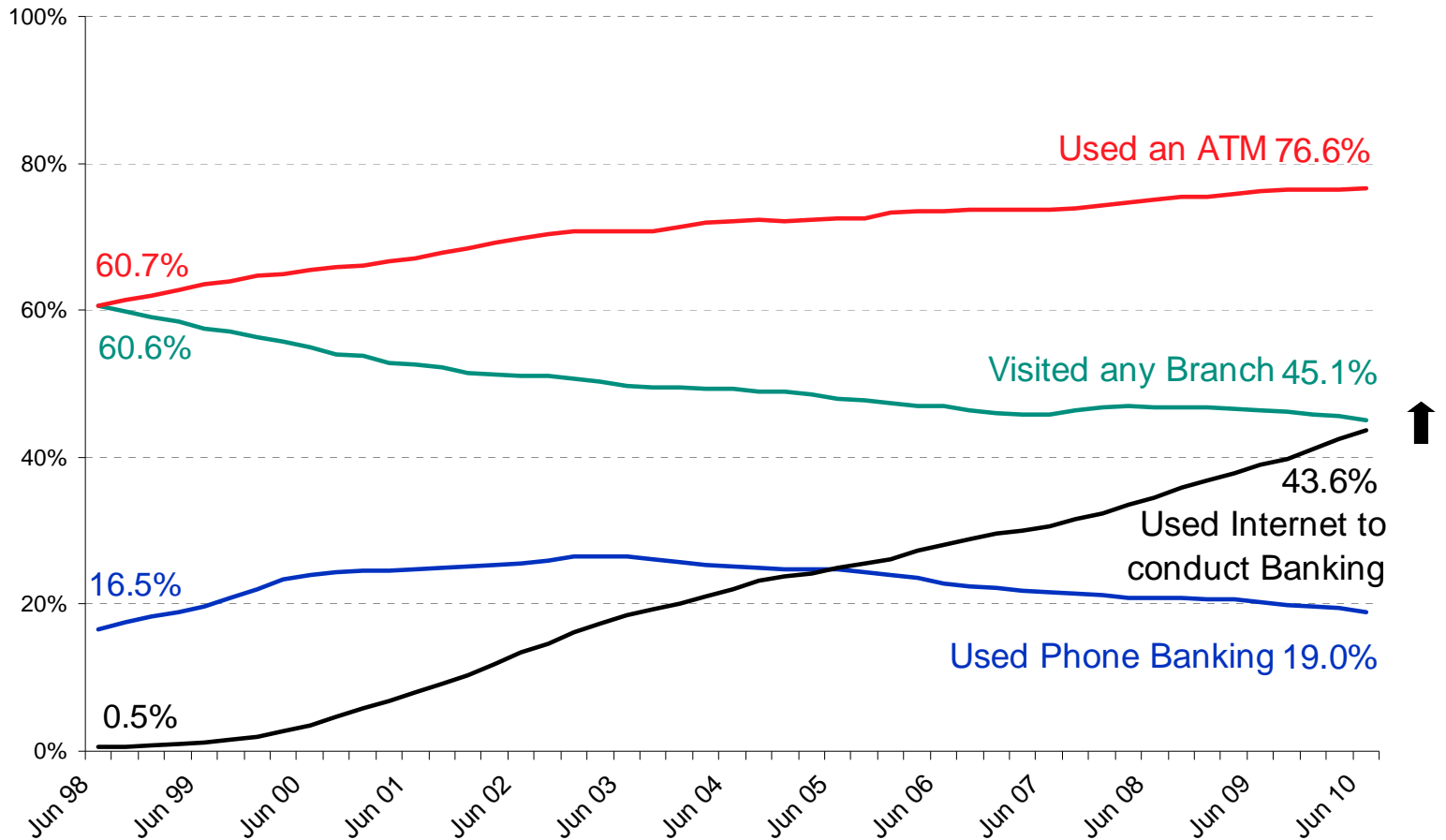
## Frequency of Internet Use



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

# TECHNOLOGY

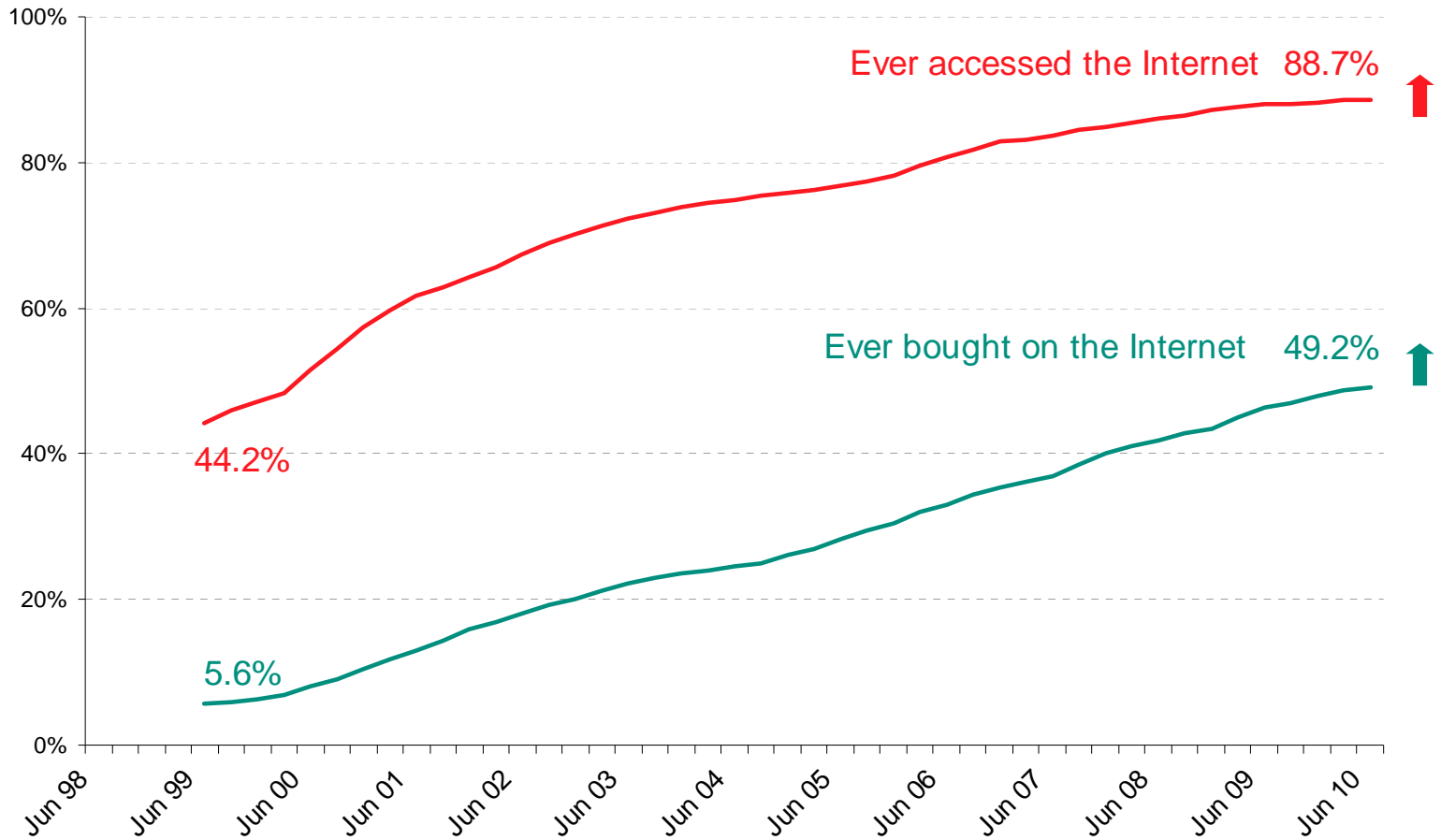
## Major Banking Channels Used in the Last 4 Weeks



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

# TECHNOLOGY

## Used the Internet or Purchased on the Internet

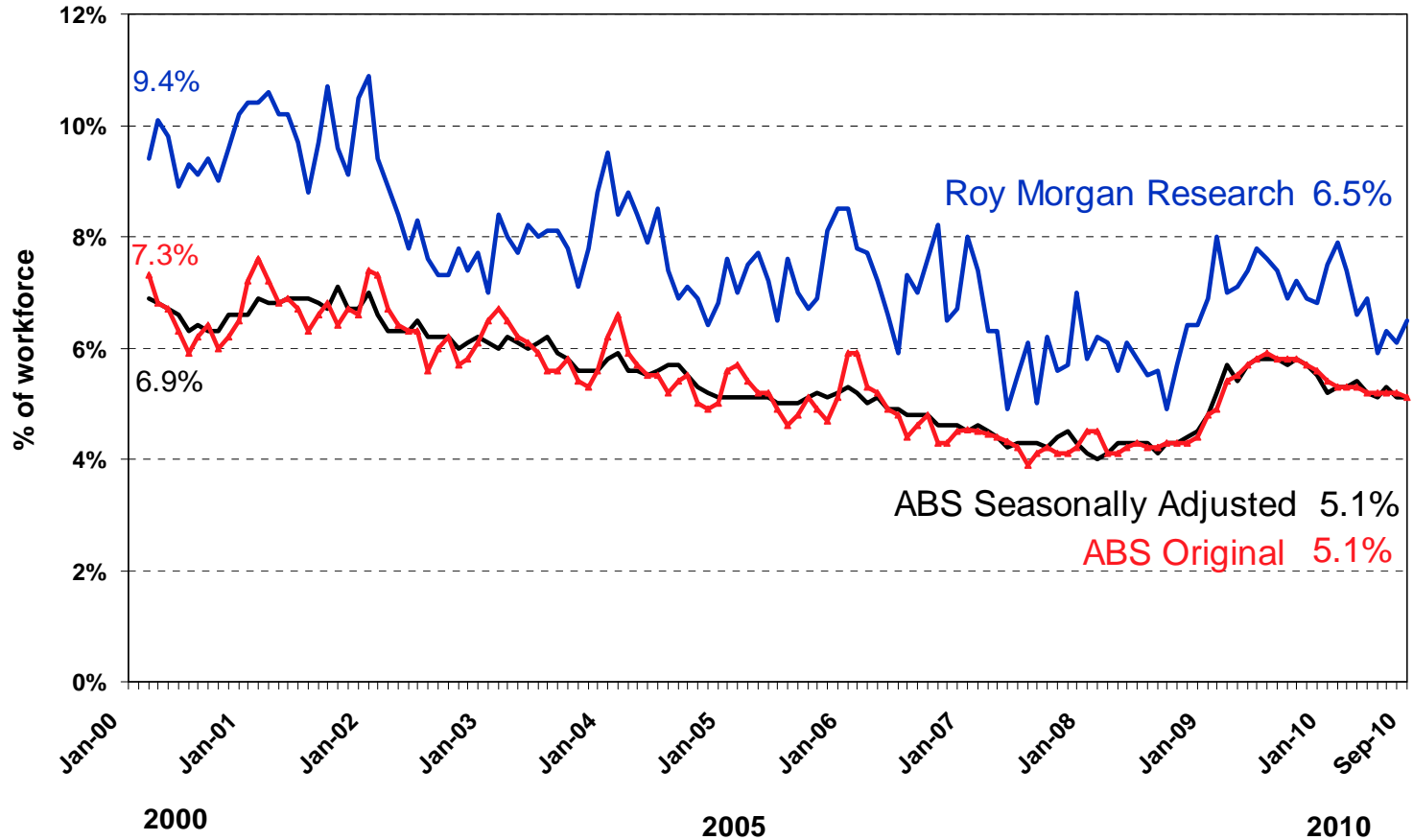


Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average

- Unemployment & Workforce Participation
- Consumer Confidence
- Lead Indicators – Share Market, Interest Rates, Exchange Rates, Superannuation
- Attitudes to Economy and Government Performance

# ECONOMY

## Level of Workforce Unemployment – Roy Morgan/ABS Monthly Figures

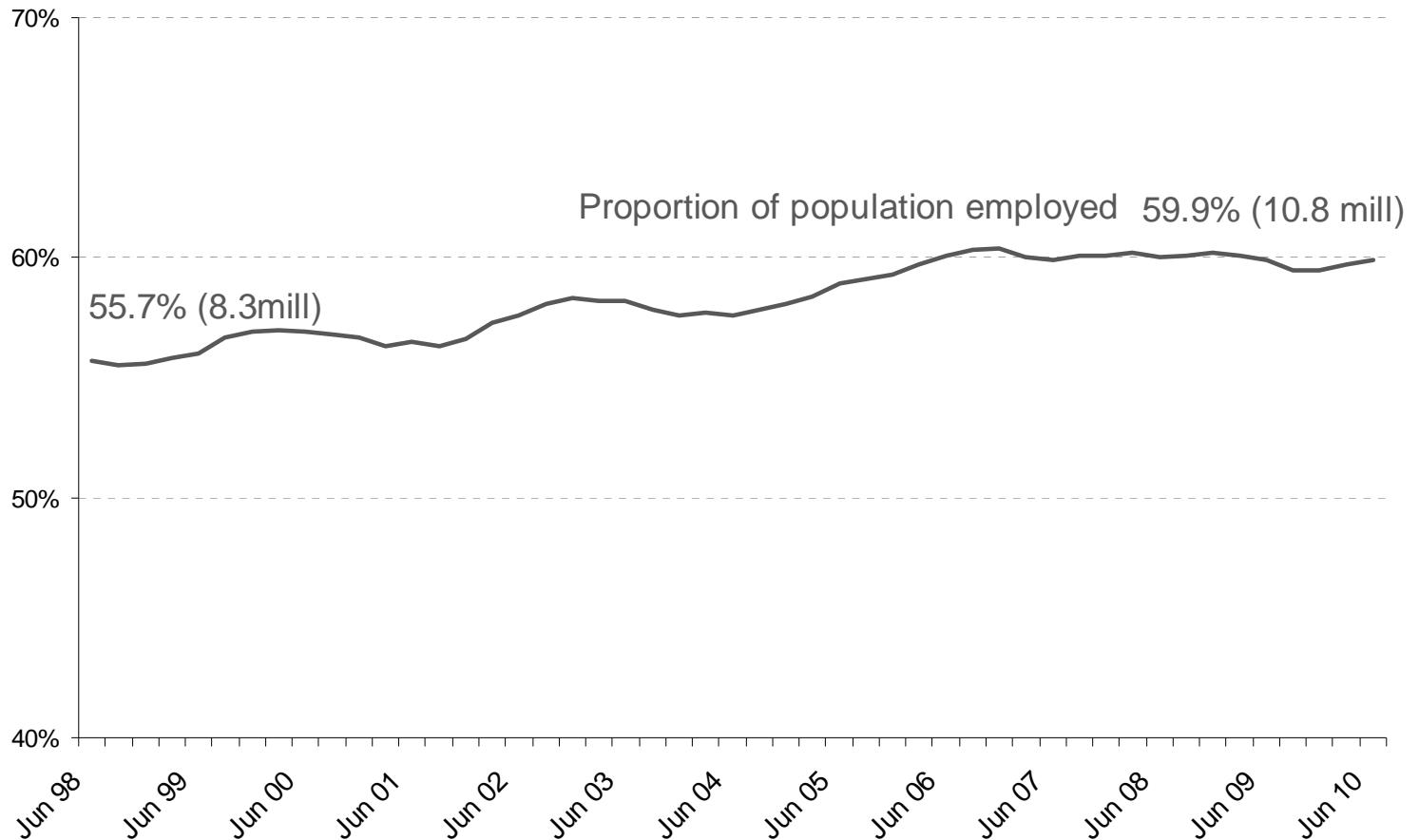


Base: Roy Morgan Research Aust. Population 14+; ABS. Monthly data.



# ECONOMY

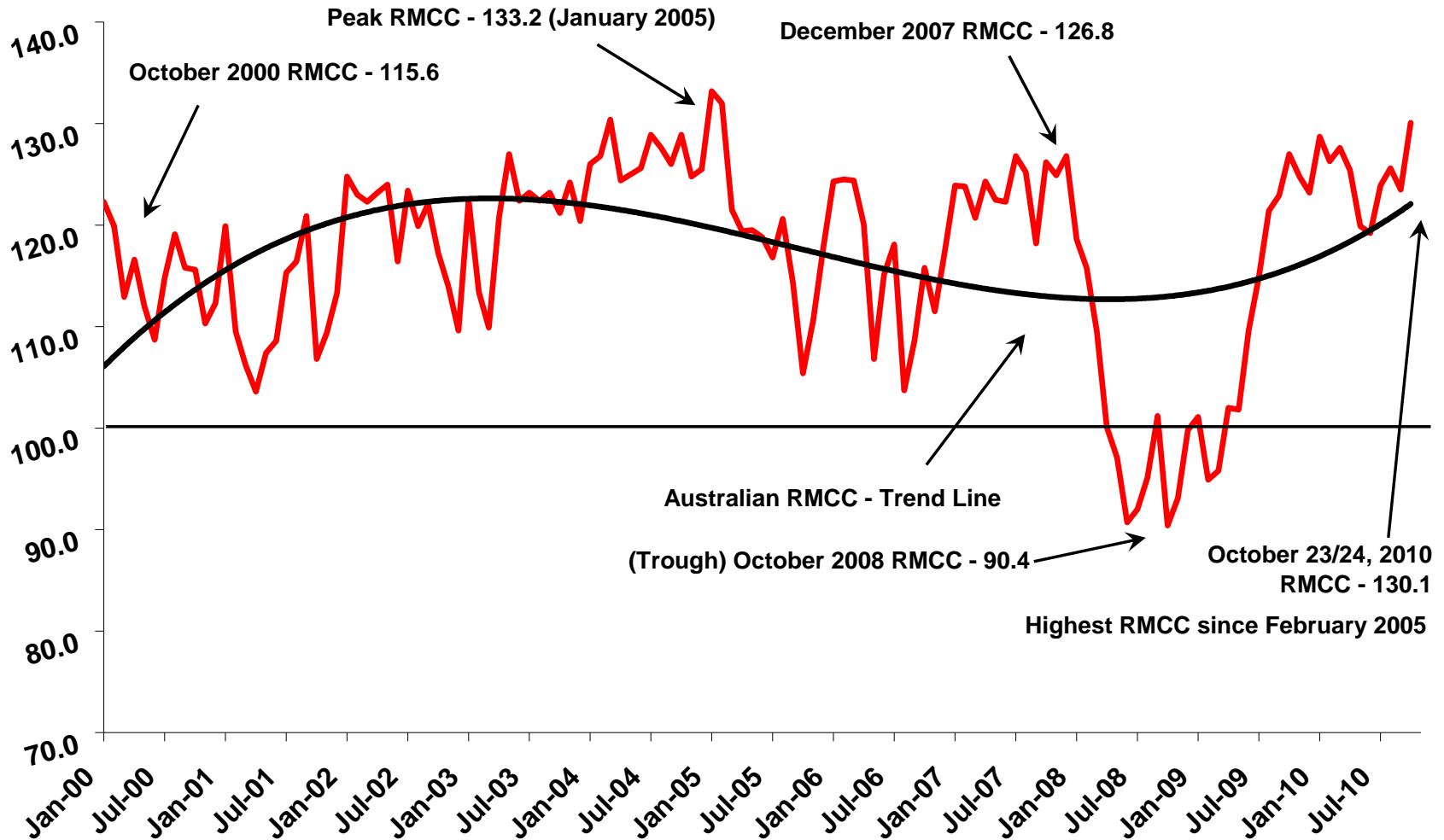
## People in Employment



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

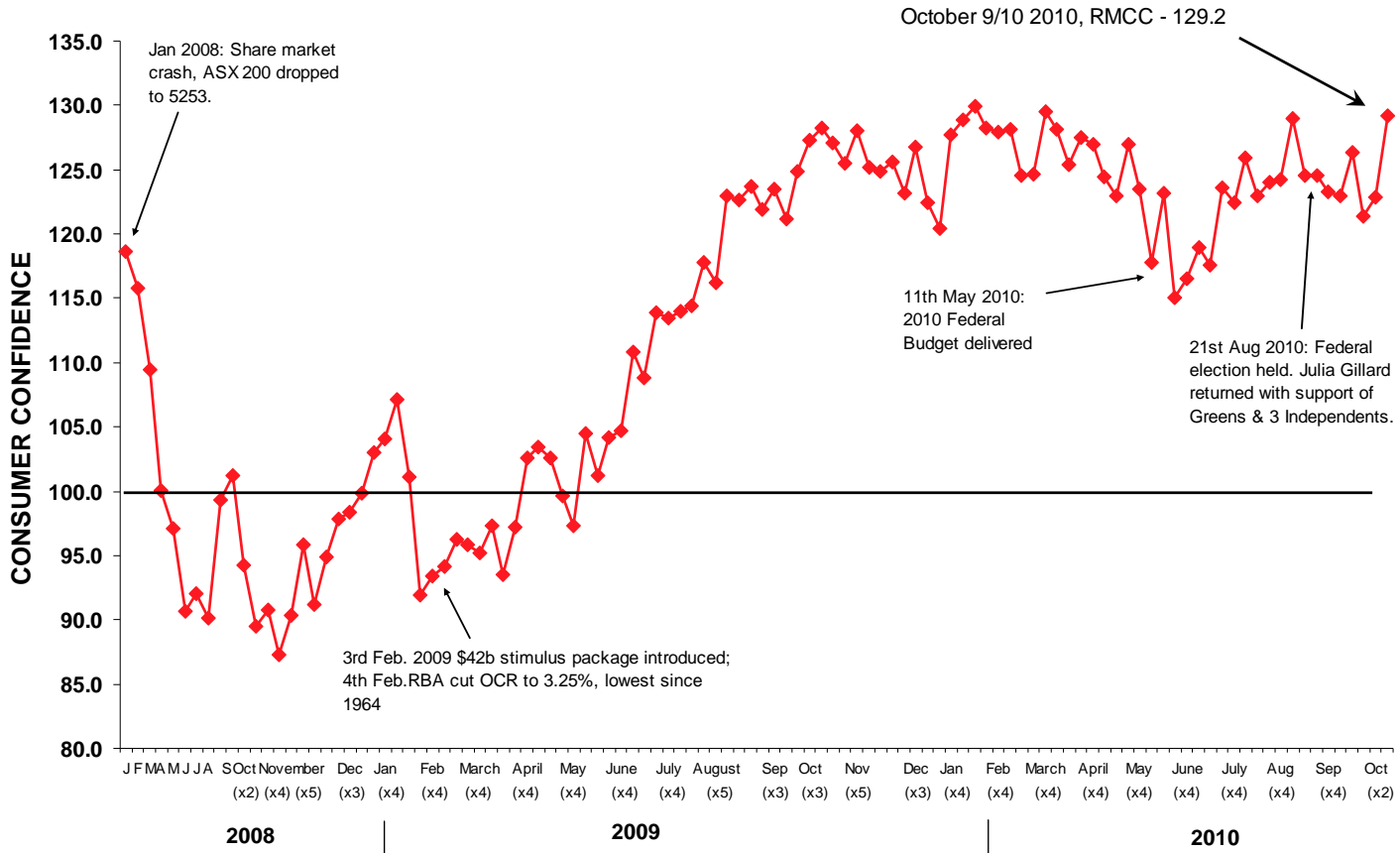
# ECONOMY

## Roy Morgan Consumer Confidence – Long Term Trend



# ECONOMY

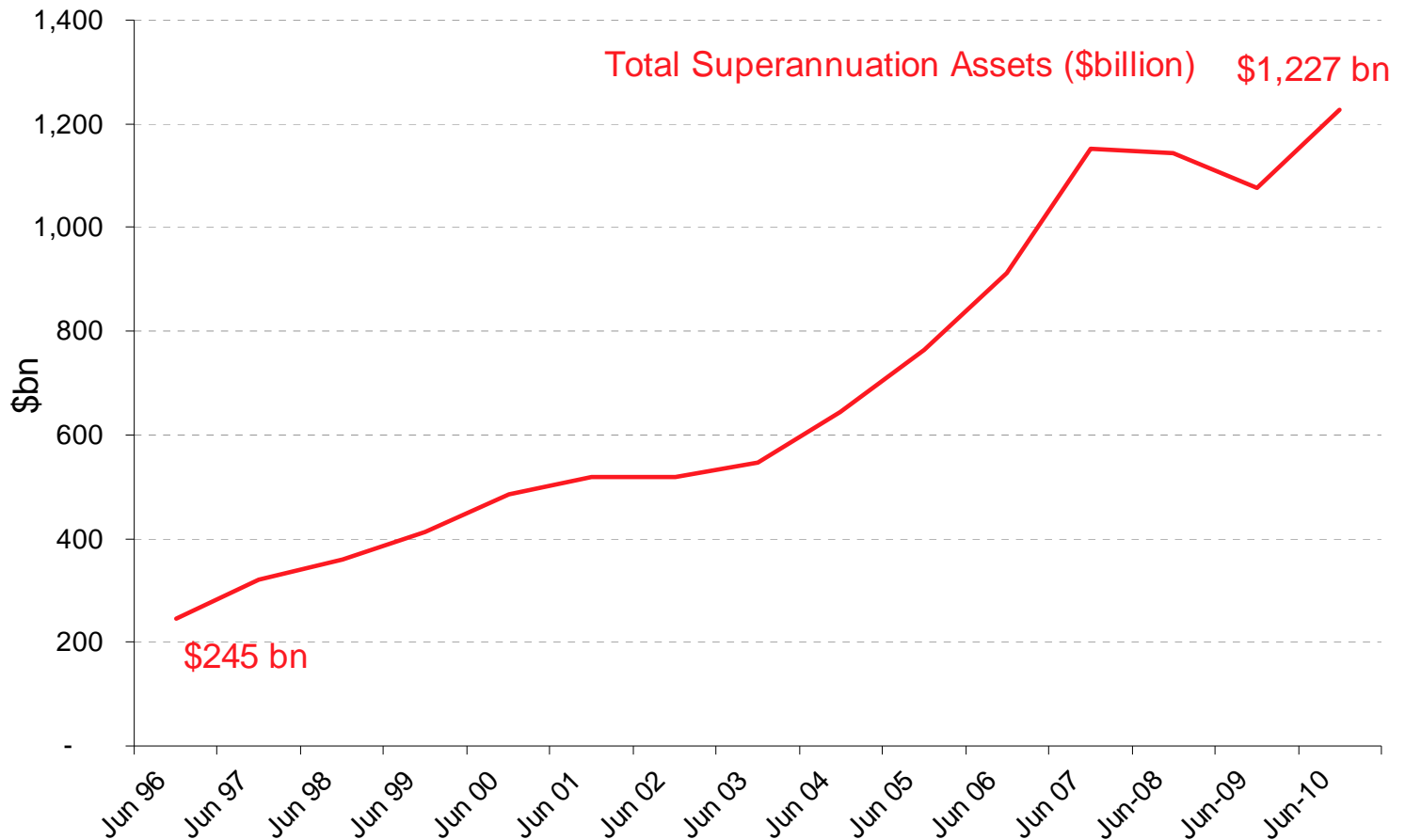
## Roy Morgan Weekly Consumer Confidence – Short Term Trend



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

# ECONOMY

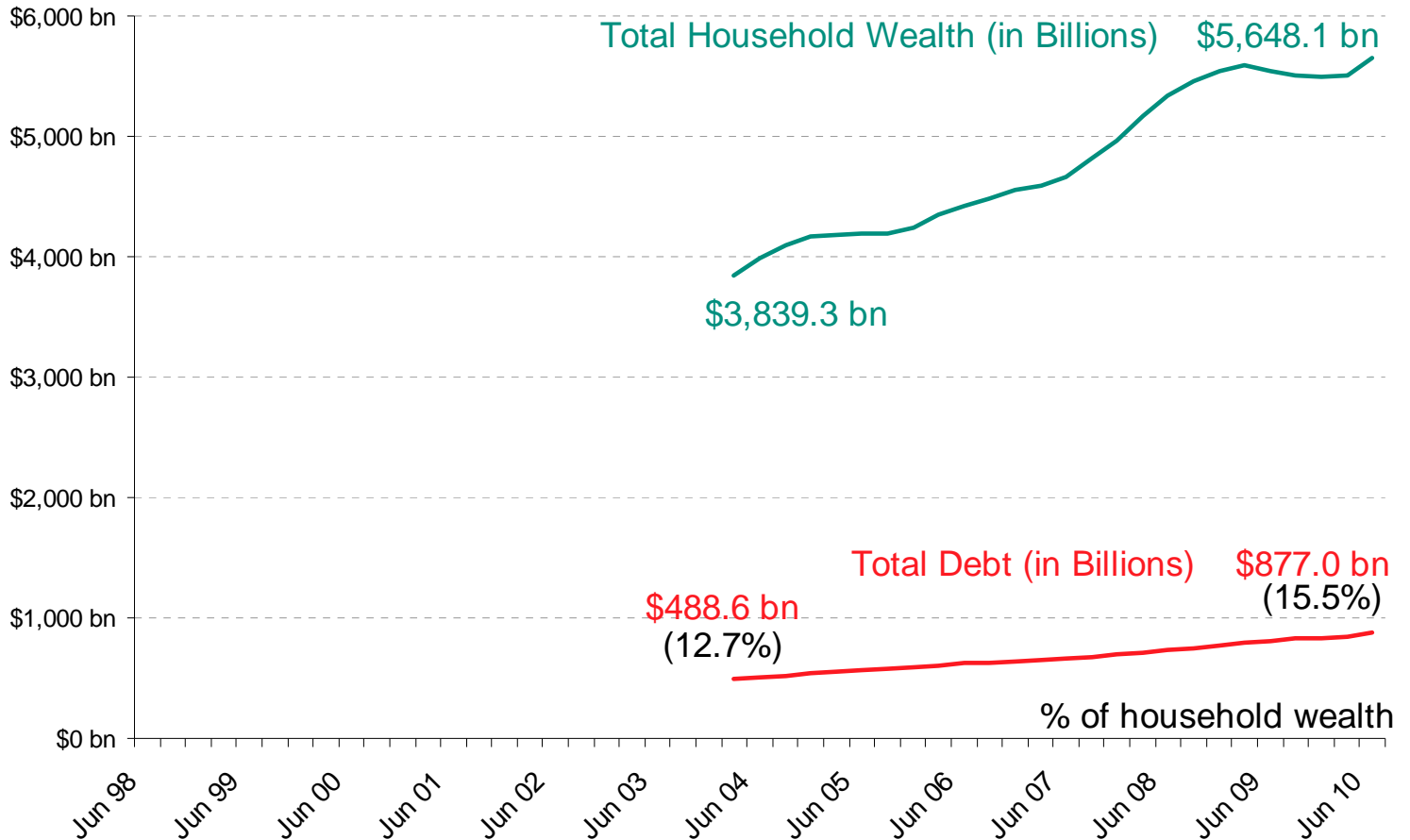
## Total Superannuation Assets



Source: APRA

# ECONOMY

## Household Wealth and Debt

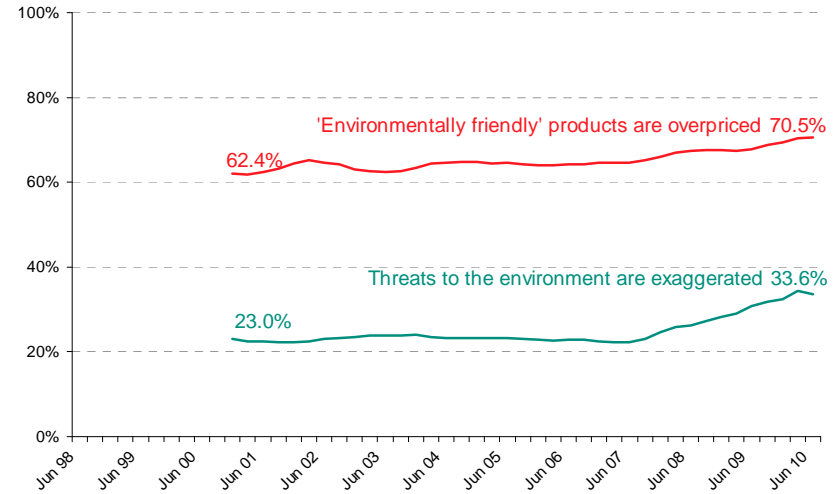
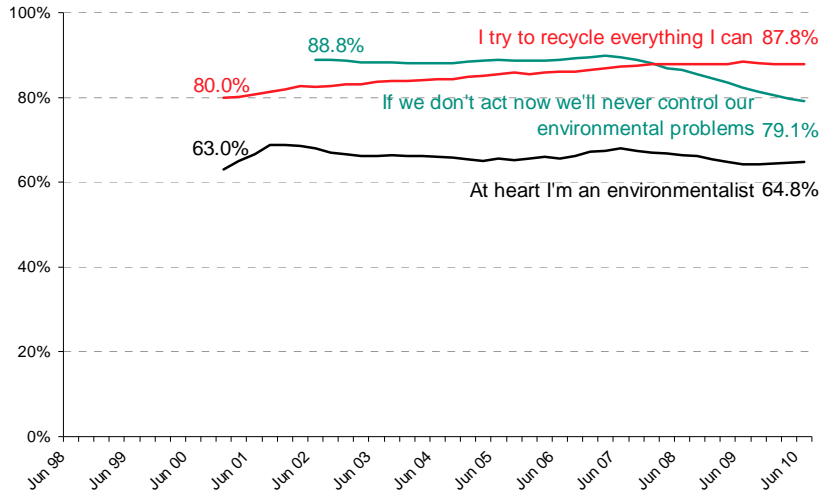


Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.

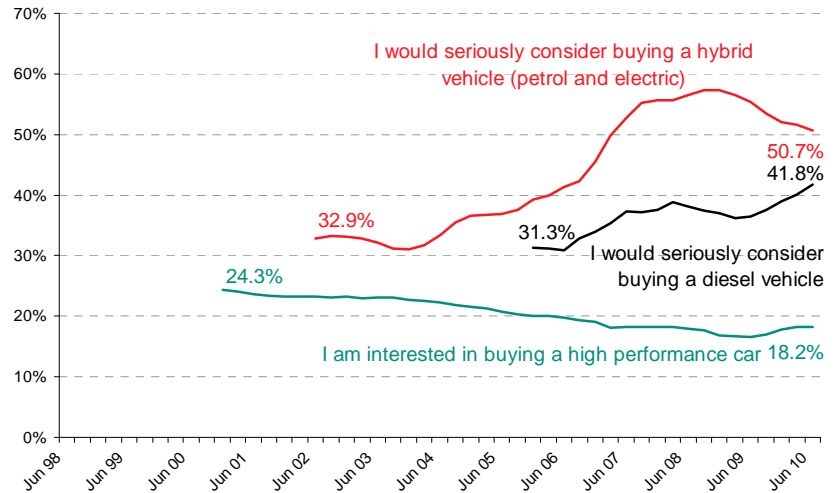
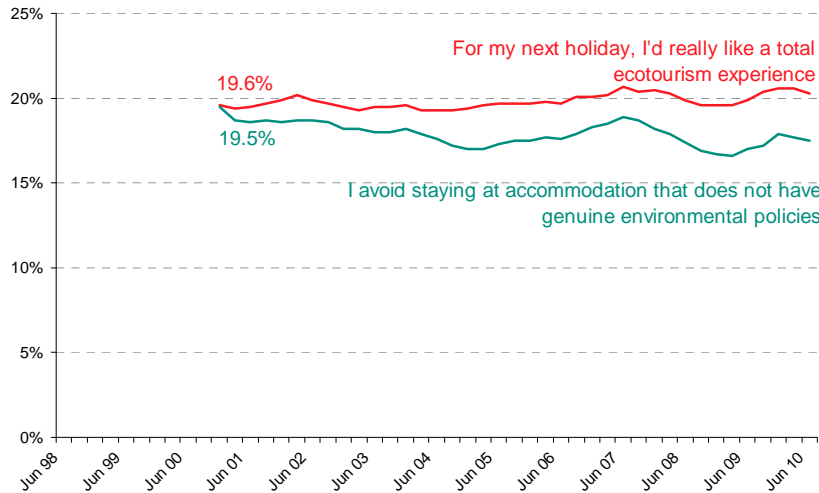
# ENVIRONMENT

## Agreement with Following Environmental Statements and Actions

### Statements



### Actions



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





## ELECTION 2010 THE POST-MORTEM

	2007 %	2010 %	change %
<i>Of those enrolled</i>			
<b>VOTED LABOR</b>	39.5	33.4	<b>-6.1</b>
<b>VOTED COALITION</b>	38.3	38.4	<b>+0.1</b>
<b>VOTED GREEN</b>	7.1	10.4	<b>+3.3</b>
<b>VOTED OTHERS</b>	6.1	5.8	<b>-0.3</b>
<b>VOTED INFORMAL</b>	3.7	5.2	<b>+1.5</b>
<b>DID NOT VOTE</b>	5.2	6.8	<b>+1.6</b>
<b>NO FORMAL VOTE</b>	9.0	12.0	<b>+3.0</b>

