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

ALP: 54%
L-NP: 46%

Howard re-elected for 3rd term at 2001 Election soon after September 11. 'Children Overboard' claims and Tampa refugees incident also help Howard win. L-NP (51%); ALP (49%)

Iraq War begins
George Bush re-elected as US President

Latham replaces Crean as Oppn. Leader in Dec 2003

Howard re-elected for 4th term at 2004 Election. Latham's stumbles and Tasmanian Timber Union support help Howard to win. L-NP (52.5%); ALP (47.5%)

RBA raises interest rates to 12 year high of 7.25%

Malcolm Turnbull replaces Nelson as Oppn. Leader

Rudd wins Government after 11 years in Opposition. ALP (52.7%); L-NP (47.3%).

Barack Obama elected US President

Oil @ $150 a barrel

Global Financial Crisis begins as Lehman Brothers bankrupts

Julia Gillard elected after first Hung Parliament since 1940. ALP (50.1%); L-NP (49.9%)

Tony Abbott replaces Turnbull as Oppn. Leader

ALP: 54%
L-NP: 46%
ECONOMY
Roy Morgan Consumer Confidence – Long Term Trend

Peak RMCC - 133.2 (January 2005)
October 2000 RMCC - 115.6
Australian RMCC - Trend Line
(Trough) October 2008 RMCC - 90.4
December 2007 RMCC - 126.8
October 23/24, 2010 RMCC - 130.1

Highest RMCC since February 2005
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

* Apologies to Alaska and Hawaii
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

Economic

Environmental

Terrorism

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

Society

Technology

Economy

Political

Environment
SOCIETY
Age Groups

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

Discover your edge
SOCIETY
Have a Degree

All Australians 14+ with Degree  24.7%

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

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.
SOCIETY
Consider themselves Progressive and Attracted to New Things and New Ideas

- Progressive viewpoint on social issues and social trends: 35.5%
- Attracted to new things and new ideas: 34.0%

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

- Homosexual couples should be allowed to adopt children: 46.3%
  - 2002: 23.2%
  - 2003: 32.0%
  - 2004: 37.1%

- Computers and technology give me more control over my life: 37.1%
  - 2002: 23.2%

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

The fundamental values of our society are under serious threat.

- Religion should be taught once a week in Government schools: 58.3%
- Women should take care of running their homes and leave running the country to men: 7.1%

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

**Participation in Sport/Exercise**

Did some formal exercise (e.g. gym etc.) 46.2%

Played a sport 23.6%

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

**Participation in Other Leisure Activities**

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</thead>
<tbody>
<tr>
<td>Used a computer at home</td>
<td>71.3%</td>
<td>50.1%</td>
<td>50.2%</td>
<td>50.3%</td>
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<tr>
<td>Entertained friends/relatives</td>
<td>48.1%</td>
<td>48.1%</td>
<td>48.2%</td>
<td>48.3%</td>
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<tr>
<td>Saw a movie</td>
<td>48.1%</td>
<td>48.1%</td>
<td>48.2%</td>
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<tr>
<td>Took a day trip in a car</td>
<td>48.1%</td>
<td>48.1%</td>
<td>48.2%</td>
<td>48.3%</td>
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<tr>
<td>Went to an art gallery, museum, or antique exhibition</td>
<td>18.7%</td>
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</tr>
<tr>
<td>Went to professional sports events (eg. cricket, football)</td>
<td>13.6%</td>
<td>13.6%</td>
<td>13.6%</td>
<td>13.6%</td>
<td>13.6%</td>
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</tbody>
</table>

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.
Have Internet connection at home

Have home phone connected

Own or use a mobile phone

Have Broadband service at home

Subscribe to Pay TV at home

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

- **Search**: 72.6%
- **Portals**: 43.9%
- **Email**: 58.0%
- **Directories**: 27.5%

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

- Facebook: 38%
- Windows Live (ninemsn): 18.2%
- Messenger: 10.9%
- YouTube: 8.2%
- Myspace: 3.5%
- Twitter: 3.5%
- Yahoo!7 Messenger: 3.0%

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**

- **Used an ATM:** 76.6%
- **Visited any Branch:** 45.1%
- **Used Internet to conduct Banking:** 43.6%
- **Used Phone Banking:** 19.0%

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.
Used the Internet or Purchased on the Internet

Ever accessed the Internet 88.7%

Ever bought on the Internet 49.2%

5.6%

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

- 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**


- **Roy Morgan Research**: 6.5%
- **ABS Seasonally Adjusted**: 5.1%
- **ABS Original**: 5.1%
Proportion of population employed 59.9% (10.8 mill)

55.7% (8.3mill)

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

Roy Morgan Consumer Confidence – Long Term Trend

- **Peak RMCC** - 133.2 (January 2005)
- **December 2007 RMCC** - 126.8
- **October 2000 RMCC** - 115.6
- **November 2008 RMCC** - 90.4
- **October 23/24, 2010**
  - RMCC - 130.1
- **Highest RMCC since February 2005**

*Australian RMCC - Trend Line*
**ECONOMY**
Roy Morgan Weekly Consumer Confidence – Short Term Trend

- **Oct 2008**: Share market crash, ASX 200 dropped to 5253.
- **3rd Feb. 2009**: $42b stimulus package introduced; 4th Feb RBA cut OCR to 3.25%, lowest since 1964.
- **11th May 2010**: 2010 Federal Budget delivered.
- **October 9/10 2010**: RMCC - 129.2

**Notes:**
- Base Aust Population aged 14+; Source: Roy Morgan Research;
ECONOMY
Total Superannuation Assets

Total Superannuation Assets ($billion)  $1,227 bn

$bn

Jun 96  Jun 97  Jun 98  Jun 99  Jun 00  Jun 01  Jun 02  Jun 03  Jun 04  Jun 05  Jun 06  Jun 07  Jun 08  Jun 09  Jun 10

Source: APRA
Total Household Wealth (in Billions) $5,648.1 bn

Total Debt (in Billions) $877.0 bn (15.5%)

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.
ENVIRONMENT
Agreement with Following Environmental Statements and Actions

**Statements**
- I try to recycle everything I can. 87.8%
- If we don’t act now we’ll never control our environmental problems. 79.1%
- At heart I’m an environmentalist. 64.8%
- Environmentally friendly’ products are overpriced. 70.5%
- Threats to the environment are exaggerated. 33.6%

**Actions**
- For my next holiday, I’d really like a total ecotourism experience. 19.6%
- I avoid staying at accommodation that does not have genuine environmental policies. 19.5%
- I would seriously consider buying a hybrid vehicle (petrol and electric). 50.7%
- I would seriously consider buying a diesel vehicle. 31.3%
- I am interested in buying a high performance car. 18.2%

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.
# Election 2010: The Post-Mortem

<table>
<thead>
<tr>
<th>Category</th>
<th>2007 %</th>
<th>2010 %</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Of those enrolled</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voted Labor</td>
<td>39.5</td>
<td>33.4</td>
<td>-6.1</td>
</tr>
<tr>
<td>Voted Coalition</td>
<td>38.3</td>
<td>38.4</td>
<td>+0.1</td>
</tr>
<tr>
<td>Voted Green</td>
<td>7.1</td>
<td>10.4</td>
<td>+3.3</td>
</tr>
<tr>
<td>Voted Others</td>
<td>6.1</td>
<td>5.8</td>
<td>-0.3</td>
</tr>
<tr>
<td>Voted Informal</td>
<td>3.7</td>
<td>5.2</td>
<td>+1.5</td>
</tr>
<tr>
<td>Did Not Vote</td>
<td>5.2</td>
<td>6.8</td>
<td>+1.6</td>
</tr>
<tr>
<td>No Formal Vote</td>
<td>9.0</td>
<td>12.0</td>
<td>+3.0</td>
</tr>
</tbody>
</table>