State of the Nation
Australia’s Changing Demographics

Presented at the ACCORD Cosmetic and Personal Care Conference 2010

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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%
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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+
Most Important Issues Facing Australia

- Economic
- Environmental
- Government, Political, and Human Rights
- Terrorism

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

All Australians 14+ with Degree 24.7%

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

Australia (RHS)  72.0%
Asia (LHS)  10.0%
UK/Ireland (LHS)  6.8%
Europe (excl.UK/Ireland) (LHS)  4.5%
New Zealand (LHS)  2.7%

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

[Graph showing trends from Jun 98 to Jun 10 with data points for progressive viewpoint on social issues and attracted to new things and new ideas]

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%

Computers and technology give me more control over my life  37.1%

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.
SOCIETY
% Participate 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
% Participating in Other Leisure Activities

- Used a computer at home: 78.6%
- Entertained friends/relatives: 64.8%
- Saw a movie: 47.0%
- Took a day trip in a car: 41.0%
- Went to an art gallery, museum, or antique exhibition: 19.0%
- Went to professional sports events (eg. cricket, football): 12.8%

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.
TECHNOLOGY
% with Major Types of Telecommunications

- Have home phone connected: 96.0%
- Main user of a mobile phone: 84.8%
- Have Internet connection at home: 40.3%
- Have Broadband service at home: 83.5%
- Subscribe to Pay TV at home: 29.3%
- Main user of a mobile phone: 77.1%
- Have Broadband service at home: 65.9%
- Have Internet connection at home: 19.2%
- Subscribe to Pay TV at home: 1.4%

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.
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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

More than once a day 50.2%
Once a day 11.3%
A few times a week 11.2%
Once a week 1.7%

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

% Using Major Banking Channels 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.
TECHNOLOGY
% Used or Purchased on the Internet

Ever accessed the Internet  88.7%

Ever bought on the Internet  49.2%

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average
Proportion of population employed 59.9% (10.7 mill)

55.7% (8.3 mill)

% of people in Employment

Base Aust Population aged 14+; Source: Roy Morgan Research; 12 month moving average.
ECONOMY
% of people in Employment

Proportion of men employed 66.8% (5.9 mill)
Proportion of women employed 53.2% (4.8 mill)

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

Australian RMCC - Trend Line

October 1999 RMCC - 119.6

September 2010, RMCC - 123.5

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

Source: APRA
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ENVIRONMENT

% Agree 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%
- ‘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 20.3%
- I avoid staying at accommodation that does not have genuine environmental policies 17.5%
- I would seriously consider buying a hybrid vehicle (petrol and electric) 50.7%
- I am interested in buying a high performance car 18.2%

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?

- Moisturising Benefits: 61%
- Value for Money: 53%
- Sun Protection Factor (SPF): 43%
- Not Tested on Animals: 40%
- Quality Brand: 35%
- Hypo-allergenic: 35%
- Anti-aging Benefits: 33%
- Gentleness: 32%
- Proven Benefits: 30%
- Made in Australia: 23%
- Reputation of Brand: 19%
- Oil Control Benefits: 19%
- Recommended by Friends/Family: 17%
- Anti-acne Benefits: 17%
- Recommendation by Beauty Professional: 9%
- Technologically Advanced: 6%
- Advertising: 3%
- Packaging: 3%

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 COSMETICS
When purchasing skin care products which are important to you?

- Value for Money: 55%
- Natural Look: 47%
- Sun Protection Factor (SPF): 40%
- Not Tested on Animals: 37%
- Quality Brand: 33%
- Ease of Application: 31%
- Moisturising Benefits: 31%
- Longwearing: 29%
- Anti-aging Benefits: 27%
- Hypo-allergenic: 26%
- Reputation of Brand: 24%
- Proven Benefits: 19%
- Made in Australia: 19%
- Range of Colours: 19%
- Recommended by Friends/Family: 15%
- Oil Control Benefits: 15%
- Glamorous Look: 10%
- Recommendation by Make-Up Artist: 6%
- Technologically Advanced: 5%
- Advertising: 4%
- Packaging: 3%

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?

Packaging
Glamorous Look
Oil Control Benefits
Recommended by Make-Up Artist
Recommended by Friends/Family
Advertising
Longwearing
Quality Brand
Range of Colours
Reputation of Brand
Technologically Advanced
Natural Look
Proven Benefits
Not Tested on Animals
Value for Money
Sun Protection Factor (SPF)
Hypo-allergenic
Ease of Application
Made in Australia
Moisturising Benefits
Anti-aging Benefits

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)
MALE SKIN CARE

When purchasing skin care products which are important to you?

- Moisturising Benefits: 51%
- Value for Money: 36%
- Sun Protection Factor (SPF): 35%
- Quality Brand: 28%
- Proven Benefits: 25%
- Made in Australia: 19%
- Not Tested on Animals: 16%
- Recommended by Friends/Family: 16%
- Anti-acne Benefits: 16%
- Hypo-allergenic: 13%
- Reputation of Brand: 13%
- Gentleness: 12%
- Anti-aging Benefits: 12%
- Oil Control Benefits: 9%
- Technologically Advanced: 4%
- Recommendation by Beauty Professional: 4%
- Advertising: 4%
- Packaging: 2%

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

- Catalogues: 46%
- Magazines: 14%
- Internet: 9%
- Television: 6%
- Newspapers: 4%
- Yellow Pages: 1%
- Radio: 1%

Source: Roy Morgan Single Source Jul09-Jun10
Base: All respondents 14+ (n=18967)
**MEDIA MOST USEFUL**
Which one media source would you find most useful for providing information when purchasing or selecting cosmetics or toiletries?

![Bar chart showing the most useful media sources for men and women.]

- **Catalogues**: 51% (Women) vs 42% (Men)
- **Magazines**: 17% (Women) vs 10% (Men)
- **Internet**: 11% (Women) vs 8% (Men)
- **Television**: 6% (Women) vs 5% (Men)
- **Newspapers**: 3% (Women) vs 5% (Men)
- **Yellow Pages**: 1% (Women) vs 1% (Men)
- **Radio**: 1% (Women) vs 1% (Men)

Source: Roy Morgan Single Source Jul09-Jun10
Base: Women (n=10830) Men (n=8137)
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Trusted advisers for Skincare & Beauty products

Q – Friends/Family ask my advice about?

12% of people have their advice sought for Skincare and Beauty products.

(4% of Men and 20% of Women)

Source: Roy Morgan Single Source Jul09-Jun10
Base: Women (n=10830) Men (n=8137)
19% of people seek advice from friends or family for Skincare and Beauty products.

(13% of Men and 25% of Women)

Source: Roy Morgan Single Source Jul09-Jun10
Base: Women (n=10830) Men (n=8137)
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)

Source: Roy Morgan Single Source Jul09-Jun10
Base: Women (n=10830) Men (n=8137)
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

Source: Roy Morgan Single Source Apr 09 – Mar 10
Proportion of spend online

5.6% of the spend on perfumes/Cosmetics or aftershave in the last 4 weeks was spent online.

3.4% of the spend on all Retail products in the last 4 weeks was spent online.

Source: Roy Morgan Single Source Jul 09 – Jun 10
Base: Total bought any commodity in the 4 weeks (aged 14+) n=15029
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