ROY MORGAN CONSUMER CONFIDENCE RATING

December 6/7, 2008
98.4 points (up 0.6 points)

Base Aust Population aged 14+: Source: Roy Morgan Research (MP)
Consumer Confidence

14-29 Age Group

Australian Population

Index

Jan-00 | Jan-01 | Jan-02 | Jan-03 | Jan-04 | Jan-05 | Jan-06 | Jan-07 | Jan-08 | Sep-08

Index:

80 | 90 | 100 | 110 | 120 | 130 | 140 | 150

Values:

Australian Population:
- Jan-00: 101
- Jan-01: 122
- Jan-02: 133
- Jan-03: 117

14-29 Age Group:
- Jan-00: 101
- Jan-01: 122
- Jan-02: 133
- Jan-03: 117
Politics
Voting Intentions

Howard re-elected at 1998 Election despite losing the 2PP. LNP (49%); ALP (51%)

Crean replaces Beazley as Opposition Leader after 2001 Election defeat.

Latham replaces Crean as Opposition Leader in December 2003.

Howard re-elected for a 3rd term at 2001 Election soon after September 11 and the controversy of the Tampa refugees incident. LNP (51%); ALP (49%)

Rudd replaces Beazley as Opposition Leader in December 2006.

Rudd brings the ALP back into Government after 11 years in Opposition. ALP (52.5%); LNP (47.5%)

Introduction of the Controversial GST Legislation - July 2000


ALP: 59.5
L-NP: 40.5

Base Aust Population aged 18+: Source: Roy Morgan Research (MP)
Early Indicators
Vehicle Purchasing Intention

Intend to Buy Any (new or used) Vehicle in Next Year

- Nov 12%
- Early Indicators 11%

Intend to Buy a Used Vehicle in Next Year

- Nov 8%
- Early Indicators 7%

Intend to Buy a New Vehicle in Next Year

- Nov 4%
- Early Indicators 4%

Base: Australian Population aged 18+
Source: Roy Morgan Research
Revolver Credit Cardholders who are paying off their home are continuing to increase their outstanding balance while those renting are steady and those who already own home are trending down.

Amount Carried Forward by Revolver Credit Cardholders, By Home Ownership Status

Source: Roy Morgan Research - Finance Monitor
Base: Revolved Credit Cardholders 18+
Time Periods: 3 monthly data
Finance

Recently I’ve cut down my spending

% of Australians 14+ who “Agree” with Statement

Base Aust Population aged 14+: Source: Roy Morgan Research (10M)
“I'm worried about interest rates at the moment”

% of Australians 14+ who "Agree" with Statement

Dec-03 Mar-04 Jun-04 Sep-04 Dec-04 Mar-05 Jun-05 Sep-05 Dec-05 Mar-06 Jun-06 Sep-06 Dec-06 Mar-07 Jun-07 Sep-07 Dec-07 Mar-08 Jun-08 Sep-08

35.8

52.0

Base Aust Population aged 14+: Source: Roy Morgan Research (10M)
Finance

“I feel financially stable at the moment”

% of Australians 14+ who “Agree” with Statement

Base Aust Population aged 14+: Source: Roy Morgan Research (10M)
Finance
Superannuation Satisfaction

Monthly Result

Data period: October 2003 to September 2008
Base: Work based or personal

Satisfied with Superannuation Products

Very Satisfied
Total Satisfied (very/fairly satisfied)

Base Aust: Population aged 14+: Source: Roy Morgan Research (10M)
Retail – Eating Out
(In Last Four Weeks)
% Change in Three Months to September 2008,
compared to previous corresponding period

-20% -15% -10% -5% 0% 5%

-17.1% -14.4% -10.4% -5.5% -3.6% -3.1% -14.4% -8.7% -5.1% -3.1% 0.7% 1.5%

Ate a meal at a fast food place
Went to a cafe for coffee or tea
Went to a licensed restaurant
Went to a BYO restaurant
Went to a cafe for a snack or meal
Went to a fast food place for takeaway
Ordered a pizza over the phone
Went to a pub or hotel only for a drink
Went to a pub or hotel for a meal
Ordered other home delivered food

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)

© Roy Morgan Research
Retail – Discretionary Expenditure
(Total Dollars Spent)
% Change in Three Months to September 2008,
compared to previous corresponding period

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)
Societal Trends
Society
Real Growth in Employment

Workers

56% (8.3mill)
60% (10.4mill)

Base Aust Population aged 14+: Source: Roy Morgan Research (10M)
### Increasing % of Australians in Employment

<table>
<thead>
<tr>
<th>Category</th>
<th>Jun 98</th>
<th>Sep 08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
<td>39.4%</td>
<td>41.2%</td>
</tr>
<tr>
<td>Part Time</td>
<td>16.3%</td>
<td>18.9%</td>
</tr>
<tr>
<td><strong>TOTAL Now Employed</strong></td>
<td>55.7%</td>
<td>60.1%</td>
</tr>
<tr>
<td>Looking for Full Time Work</td>
<td>3.8%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Looking for Part Time Work</td>
<td>1.3%</td>
<td>1.8%</td>
</tr>
<tr>
<td><strong>TOTAL Looking for Work</strong></td>
<td>5.1%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Don't Work</td>
<td>3.0%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Home Duties</td>
<td>11.7%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Retired</td>
<td>16.2%</td>
<td>19.1%</td>
</tr>
<tr>
<td>Students</td>
<td>8.3%</td>
<td>6.6%</td>
</tr>
<tr>
<td><strong>TOTAL Not Employed/ Not Looking</strong></td>
<td>39.2%</td>
<td>36.3%</td>
</tr>
<tr>
<td><strong>TOTAL POPULATION</strong></td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)
Society
Rising Education Level

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)
Society

Australians Becoming More Progressive

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)

Attracted to new things and new ideas

28% 32% 34%

Jun 98 Jun 99 Jun 00 Jun 01 Jun 02 Jun 03 Jun 04 Jun 05 Jun 06 Jun 07 Sep 08

25% 30% 35% 40%

© Roy Morgan Research
**Society**

**Australians Becoming More Progressive**

![Line Graph]

- **Religion should be taught once a week in Government schools**: 67% to 61%
- **Women should take care of running their homes and leave running the country to men**: 9% to 8%

Base: Aust Population aged 14+; Source: Roy Morgan Research (10M)
Society
Australians Becoming More Progressive

- I try to recycle everything I can: 16% in Jun 98, 24% in Jun 99, 35% in Sep 08, reaching 88%.
- Homosexual couples should be allowed to adopt children: 24% in Jun 98, growing to 42% in Jun 04, remaining at 35% in Sep 08.
- Computers and technology give me more control over my life: 78% in Jun 98, increasing to 88%.

Base Aust Population aged 14+: Source: Roy Morgan Research (10M)
Technology
Media Consumption Over Time

- Watched any Commercial TV on a normal weekday: 95% (Jun 98), 94% (Sep 08)
- Read any Magazine (last issue): 79% (Jun 00), 83% (Sep 08)
- Read any Newspaper in last 7 days (excl. Community Newspapers): 74% (Jun 00), 79% (Sep 08)
- Listened to any Commercial Radio on a normal weekday: 55% (Jun 98), 65% (Sep 08)
- Accessed the Internet at least monthly: 89% (Jun 00), 95% (Sep 08)
- Read any Local/Community Newspapers in the last 7 days: 21% (Jun 98), 45% (Sep 08)
- Been to Cinema in last 4 weeks: 30% (Jun 98), 26% (Sep 08)
- Watched Pay TV in the last 7 days: 8% (Jun 98), 21% (Sep 08)

Base: Aust Population aged 14+; Source: Roy Morgan Research (10M)
I avoid staying at accommodation that does not have genuine environmental policies

For my next holiday, I'd really like a total ecotourism experience

I would seriously consider buying a hybrid vehicle (petrol and electric)

I am interested in buying a high performance car

Base Aust Population aged 14+: Source: Roy Morgan Research (AUTO)
Spotlight on Automotive: ‘Greenhouse Gas Emissions’
Comparison to Kyoto Emissions Figures

<table>
<thead>
<tr>
<th>Year</th>
<th>Roy Morgan Estimate Total Automotive Carbon Emissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>41,294</td>
</tr>
<tr>
<td>2001</td>
<td>42,004</td>
</tr>
<tr>
<td>2002</td>
<td>42,004</td>
</tr>
<tr>
<td>2003</td>
<td>49,162</td>
</tr>
<tr>
<td>2004</td>
<td>42,617</td>
</tr>
<tr>
<td>2005</td>
<td>42,617</td>
</tr>
<tr>
<td>2006</td>
<td>42,617</td>
</tr>
<tr>
<td>2007</td>
<td>49,162</td>
</tr>
</tbody>
</table>


Base: Australian Drivers aged 18+

Source: Roy Morgan Research (AUTO)
## Breakdown of Automotive Carbon Emissions By VFACTS Categories

<table>
<thead>
<tr>
<th></th>
<th>% Share of Drivers (18+)</th>
<th>% Share of Auto Carbon Emissions</th>
<th>Per Capita Carbon Emissions</th>
<th>Auto Carbon Emissions in 12 months to March, 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Light</td>
<td>10%</td>
<td>6%</td>
<td>2,334</td>
<td>2,992,086</td>
</tr>
<tr>
<td>Total Small</td>
<td>24%</td>
<td>17%</td>
<td>2,866</td>
<td>8,500,151</td>
</tr>
<tr>
<td>Total Medium</td>
<td>15%</td>
<td>13%</td>
<td>3,496</td>
<td>6,623,366</td>
</tr>
<tr>
<td>Total Large</td>
<td><strong>30%</strong></td>
<td><strong>39%</strong></td>
<td><strong>5,138</strong></td>
<td><strong>19,056,056</strong></td>
</tr>
<tr>
<td>Total Upper Large</td>
<td>1%</td>
<td>2%</td>
<td>5,052</td>
<td>846,036</td>
</tr>
<tr>
<td>Total People Movers</td>
<td>2%</td>
<td>2%</td>
<td>4,625</td>
<td>1,202,079</td>
</tr>
<tr>
<td>Total Sports</td>
<td>1%</td>
<td>1%</td>
<td>2,938</td>
<td>336,483</td>
</tr>
<tr>
<td>Total SUV</td>
<td><strong>15%</strong></td>
<td><strong>20%</strong></td>
<td><strong>5,266</strong></td>
<td><strong>9,896,032</strong></td>
</tr>
<tr>
<td>Total Drivers (18+)</td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
<td><strong>4030</strong>*</td>
<td><strong>49,452,287</strong></td>
</tr>
</tbody>
</table>

Base: Australian Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)

* This average excludes values for “Light Commercial” vehicles used elsewhere in this report.
Share of Personal Automotive Carbon Dioxide Emissions By Population Quintile

Quintile 5 (Non-green/ Most fuel used) 48%
Quintile 4 23%
Quintile 3 15%
Quintile 2 9%
Quintile 1 (Greenest/ Least fuel used) 5%

Base: Australian Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)
Cumulative Personal Automotive Carbon Dioxide Emissions By Population Quintile

% of all Personal Automotive Carbon Dioxide Emissions

Quintile 1 (Greenest/ Least fuel used) Quintile 2 Quintile 3 Quintile 4 Quintile 5 (Non-green/ Most fuel used)

Base: Australian Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)
Mean Automotive Carbon Emissions Footprint By Quintile

Average Annual Automotive Carbon Emissions Per Driver (18+) (Kgs)

- All Drivers 18+ (4,245)
- Quintile 1 (Greenest/Least fuel used) (1,003)
- Quintile 2 (2,094)
- Quintile 3 (3,086)
- Quintile 4 (4,650)
- Quintile 5 (Non-green/Most fuel used) (10,185)

Base: Australian Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)
Average Annual KMs Travelled By Carbon Emissions Quintile

Base: Australian Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)
Per Capital Automotive Carbon Emissions By Industry of Employment

- Agriculture: 6,392 kg
- Mining: 6,027 kg
- Transport and Storage: 6,177 kg
- Communication: 4,760 kg
- Electricity, Gas and Water: 5,618 kg
- Wholesale: 5,664 kg
- Construction: 5,801 kg
- Manufacturing: 5,390 kg
- Public Administration and Defence: 4,189 kg
- Finance, Property & Business Services: 4,317 kg
- Retail: 4,330 kg
- Recreation and Personal: 4,352 kg
- Mining: 4,330 kg
- Construction: 4,317 kg
- Retail: 4,330 kg
- Recreation and Personal: 4,352 kg
- Finance, Property & Business Services: 4,317 kg
- Public Administration and Defence: 4,189 kg

Base: Australian Employed Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)
Regional Variation in Automotive Carbon Emissions – Sydney and Melbourne

![Regional Variation in Automotive Carbon Emissions – Sydney and Melbourne](chart.png)

**Base:** Australian Employed Drivers aged 18+, 12 months to March 2008

**Source:** Roy Morgan Research (AUTO)
# Highest 10 Federal Electorates By Mean Carbon Emissions Per Driver

<table>
<thead>
<tr>
<th>Rank</th>
<th>Electorate</th>
<th>Mean Auto Carbon Emissions (kgs)</th>
<th>State</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>McEwen (LNP)</td>
<td>6,610</td>
<td>Vic</td>
<td>Country &amp; Outer North of Melbourne.</td>
</tr>
<tr>
<td>2</td>
<td>Gippsland (LNP)</td>
<td>6,256</td>
<td>Vic</td>
<td>Eastern Country Victoria.</td>
</tr>
<tr>
<td>3</td>
<td>Dawson (LNP)</td>
<td>6,028</td>
<td>Qld</td>
<td>North coastal (Proserpine)</td>
</tr>
<tr>
<td>4</td>
<td>Corio (ALP)</td>
<td>5,702</td>
<td>Vic</td>
<td>Western Port Phillip Bay (Geelong)</td>
</tr>
<tr>
<td>5</td>
<td>McMillan (LNP)</td>
<td>5,600</td>
<td>Vic</td>
<td>Western Gippsland (Pakenham)</td>
</tr>
<tr>
<td>6</td>
<td>Flinders (LNP)</td>
<td>5,596</td>
<td>Vic</td>
<td>SE Port Phillip Bay, Western Port Bay</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Outer SE of Melbourne (Narre Warren, Cranbourne)</td>
</tr>
<tr>
<td>7</td>
<td>Holt (ALP)</td>
<td>5,548</td>
<td>Vic</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Canning (LNP)</td>
<td>5,547</td>
<td>WA</td>
<td>SE of Perth, outer Fremantle</td>
</tr>
<tr>
<td>9</td>
<td>O’Connor (LNP)</td>
<td>5,539</td>
<td>WA</td>
<td>Regional WA, surrounding Perth.</td>
</tr>
<tr>
<td>10</td>
<td>Macarthur (LNP)</td>
<td>5,481</td>
<td>NSW</td>
<td>South Western Sydney suburbs.</td>
</tr>
</tbody>
</table>

Base: Australian Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)
# Lowest 10 Federal Electorates By Mean Carbon Emissions Per Driver

<table>
<thead>
<tr>
<th>Rank</th>
<th>Electorate</th>
<th>Mean Auto Carbon Emissions (kgs)</th>
<th>State</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sydney (ALP)</td>
<td>1,715</td>
<td>NSW</td>
<td>City centre.</td>
</tr>
<tr>
<td>2</td>
<td>Wentworth (LNP)</td>
<td>1,944</td>
<td>NSW</td>
<td>Inner city Sydney.</td>
</tr>
<tr>
<td>3</td>
<td>Melbourne (ALP)</td>
<td>2,401</td>
<td>Vic</td>
<td>City centre.</td>
</tr>
<tr>
<td>4</td>
<td>North Sydney (LNP)</td>
<td>2,437</td>
<td>NSW</td>
<td>Inner city Sydney.</td>
</tr>
<tr>
<td>5</td>
<td>Warringah (LNP)</td>
<td>2,510</td>
<td>NSW</td>
<td>Inner northern Sydney.</td>
</tr>
<tr>
<td>6</td>
<td>Lowe (ALP)</td>
<td>2,562</td>
<td>NSW</td>
<td>Inner city Sydney.</td>
</tr>
<tr>
<td>7</td>
<td>Higgins (LNP)</td>
<td>2,702</td>
<td>Vic</td>
<td>Inner south eastern Melbourne.</td>
</tr>
<tr>
<td>8</td>
<td>Denison (ALP)</td>
<td>2,737</td>
<td>Tas</td>
<td>City Centre.</td>
</tr>
<tr>
<td>9</td>
<td>Hindmarsh (ALP)</td>
<td>2,909</td>
<td>SA</td>
<td>Western central Adelaide.</td>
</tr>
<tr>
<td>10</td>
<td>Bradfield (LNP)</td>
<td>2,914</td>
<td>NSW</td>
<td>Inner northern Sydney.</td>
</tr>
</tbody>
</table>

Base: Australian Drivers aged 18+, 12 months to March 2008
Source: Roy Morgan Research (AUTO)
Perth, Western Australia
Australian Capital Territory
Number of Australians Who Drive

Number of Drivers (18+)

Male Drivers (18+)

Female Drivers (18+)

Base: Australian Population aged 18+
Source: Roy Morgan Research
Proportion of Australians that Drive

Base: Australian Drivers aged 18+
Source: Roy Morgan Research
Segment of Vehicle Driven

Base: Australian Drivers aged 18+
Source: Roy Morgan Research
Due to Upper Large Car Segment changed classification; no earlier data available
Note: Shaded area surveyed prior to VFACTS changed segment classification and should be interpreted accordingly.

© Roy Morgan Research
Segment Share of New Car Intention

Base: Australian New Car Intenders within four years, aged 18+
Source: Roy Morgan Research
Note: Shaded area surveyed prior to VFACTS changed segment classification and should be interpreted accordingly
Average Cost of Routine Service

Base: Australian Drivers aged 18+ who have had a routine service in the last three months
Source: Roy Morgan Research
“The economic meltdown and the planetary meltdown are in many ways two sides of the same coin.

“The best path to recovery is to use the same solutions to benefit both crises simultaneously, boosting our economy by breaking through the capacity constraints holding back the transition to a zero emissions economy.”

Christine Milne
Thank you.

The State Of The Nation Report

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