State of the Nation

The Manpower Vision Series
March 14, 2008

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Melbourne, Australia
Society
Rising Education Level

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)
Society
Increasing % of Australians Working

- Workers: 56% (8.3 million) to 60% (10.2 million)

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)
Society
Australians Becoming Less Conservative

Teach Religion in schools

Women should just run the home

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

- I try to recycle everything I can: 16% to 88%
- Computers and technology give me more control over my life: 16% to 34%
- Homosexual couples should be allowed to adopt children: 24% to 43%

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

- Used a computer at home: 71% to 65%
- Entertained friends/relatives: 71% to 72%
- Took a day trip in a car: 28% to 32%
- Played a sport: 32% to 30%
- Went to an art gallery, museum, or antique exhibition: 19% to 14%
- Went to a professional sports event: 17% to 13%
- Saw a movie: 48% to 45%

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

Chinese: 78% (Jun 98) to 74% (Sep 07)
Italian: 59% (Jun 98) to 60% (Sep 07)
Thai: 41% (Jun 98) to 47% (Sep 07)
Indian: 32% (Jun 98) to 40% (Sep 07)
Japanese: 24% (Jun 98) to 28% (Sep 07)

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

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I always think of the number of calories in the food I'm eating

I try to buy additive free food

A low fat diet is a way of life for me
Society

BMI

- **Underweight**: 3% (Jun 98) to 2% (Sep 07)
- **Acceptable Weight**: 38% (Jun 98) to 36% (Sep 07)
- **Overweight**: 32% (Jun 98) to 33% (Sep 07)
- **Obese**: 21% (Jun 98) to 25% (Sep 07)

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)
Technology
Mobile and Internet, particularly Broadband Increase

Have home phone connected

Main user of a mobile phone

Have Internet connection at home

Subscribe to Pay TV at home

Have Broadband service at home

Base Aust Population aged 14+; Source: Roy Morgan Research (TECH)
Technology

MP3 Players, DVD Burners, 3G Phone Consideration and VOIP Use/Intention Increasing

- Owned MP3 Player/iPod: 2% (Jun 98), 4% (Jun 01), 5% (Jun 03), 10% (Jun 06), 15% (Sep 07)
- Own a DVD Burner: 2% (Jun 98), 37% (Jun 06)
- I would seriously consider buying a 3G phone: 0% (Jun 98), 5% (Jun 99), 5% (Jun 00), 37% (Jun 06)
- Already Use/Likely to use VoIP (next 12 months): 2% (Jun 98), 39% (Jun 07)

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

- Watched any Commercial TV on a normal weekday
- Read any Magazine (last issue)
- Read any Newspaper in last 7 days (excl. Community Newspapers)
- Listened to any Commercial Radio on a normal weekday
- Accessed the Internet at least monthly
- Read any Local/Community Newspapers in the last 7 days
- Been to Cinema in last 4 weeks
- Watched Pay TV in the last 7 days

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

- Used Internet to Access Financial Services: 1%, 8%, 17%, 22%, 24%, 32%, 32%
- Total Visited Any Branch: 61%, 54%, 46%
- Total Used Phone Banking: 17%, 20%, 24%, 28%, 30%
- Used an ATM: 8%, 22%, 74%

Base Aust Population aged 14+; Source: Roy Morgan Research (Finance)
Technology
Shopping on the Internet

TOTAL Ever Accessed the Internet

6% 44% 85%

TOTAL Ever Bought on the Internet

6% 10% 39%

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

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Economy
Share Market

Source: Reserve Bank of Australia
Economy
Total Superannuation Assets

Total Superannuation Assets ($billion)

© Roy Morgan Research
Economy
Rising Wealth & Debt

- **Housing Loan Outstandings*** 1997 – 2007, increased 327%
- **Credit Card Outstandings*** 1997 – 2007, increased 412%
- **Superannuation Savings*** 1997 – 2007, increased 269%

Unprecedented increases in major borrowings and savings – factors such as de-regulation has seen increased competition and marketing activity.

*Based on RBA and APRA data and estimates*
Economy

Consumer Confidence

Base Aust Population aged 14+; Source: Roy Morgan Research (MP)
The Australian economy appears to be improving

I'm worried about interest rates at the moment

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

Standard variable bank housing loan interest rate

Source: Reserve Bank of Australia
Economy
Unemployment

Roy Morgan Research

ABS Original
ABS Seasonally Adjusted

Base: ABS Quarterly Average June Quarter 2007, Roy Morgan Quarterly Estimate (MP)

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Economy
Exchange Rates

Source: Reserve Bank of Australia

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**Politics**

**Voting Intentions**

Howard re-elected for a 4th and final term at 2004 Election as Mark Latham implodes.

LNP (52.5%); ALP (47.5%)

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%)

Introduction of the Controversial GST Legislation - July 2000

Crean replaces Beazley as Opposition Leader after 2001 Election defeat.

Latham replaces Crean as Opposition Leader in December 2003.

Rudd replaces Beazley as Opposition Leader in December 2006.

Crean replaces Beazley as Opposition Leader after 2001 Election defeat.

Latham replaces Crean as Opposition Leader in December 2003.

Rudd replaces Beazley as Opposition Leader in December 2006.

Beazley replaces Latham as Opposition Leader in January 2005.

Rudd brings the ALP back into Government after 11 years in Opposition.

ALP (52.5%); LNP (47.5%)

ALP: 60.0%

L-NP: 40.0%

Base Aust Population aged 18+; Source: Roy Morgan Research (MP)
Environment

Environment as an Issue has come of Age

If we don't act now we'll never control our environmental problems

89% 89%

I try to recycle everything I can

89% 88%

At the heart I'm an environmentalist

89% 67%

'Environmentally friendly' products are overpriced

65%

22% 23%

Threats to the environment are exaggerated

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

**Taking Action is the Next Step**

- **I avoid staying at accommodation that does not have genuine environmental policies**
  - 18% in Jun 00
  - 19% in Jun 01
  - 20% in Jun 02

- **I would seriously consider buying a hybrid vehicle (petrol and electric)**
  - 55% in Sep 07

- **For my next holiday, I'd really like a total ecotourism experience**
  - 33% in Jun 00

- **I am interested in buying a high performance car**
  - 25% in Jun 00

*Base Aust Population aged 14+; Source: Roy Morgan Research (AUTO)*
Environment
Public Transport

Sydney
69% 66%

Melbourne
60% 65%

National
51% 51%

Base Aust Population aged 14+; Source: Roy Morgan Research (10M)
Increasing % of Australians Working

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

- **Full Time**
  - 39% (5.9mill)
  - June 04: 41% (7.0mill)
- **Part Time**
  - 16% (2.4mill)
  - June 04: 19% (3.2mill)
- **TOTAL Now Employed**
  - 56% (8.3mill)
  - June 04: 60% (10.2mill)

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

- Full Time: 39% (5.9 million) - 41% (7.0 million)
- Part Time: 16% (2.4 million) - 19% (3.2 million)
- Looking For Work: 5% (0.8 million) - 4% (0.7 million)
- Not Employed/Not Looking: 36% (6.1 million) - 39% (5.8 million)

Base: Aust Population aged 14+; Source: Roy Morgan Research (10M)
### 10.2 million Australians are employed
### 1.5 million Australians are unemployed or under-employed

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<thead>
<tr>
<th></th>
<th>Jun 1998</th>
<th>Sep 2007</th>
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<tbody>
<tr>
<td><strong>Now Employed TOTAL</strong></td>
<td></td>
<td></td>
<td><strong>10.2 million</strong></td>
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<tr>
<td>Full Time</td>
<td>39.5%</td>
<td>41%</td>
<td>7.0 million</td>
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<tr>
<td>Part Time</td>
<td>16.5%</td>
<td><strong>19%</strong></td>
<td>3.2 million</td>
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<tr>
<td><strong>Looking for Work TOTAL</strong></td>
<td></td>
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<td><strong>0.7 million</strong></td>
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<tr>
<td>Looking for Full Time Work</td>
<td>4%</td>
<td>2%</td>
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</tr>
<tr>
<td>Looking for Part Time Work</td>
<td>1%</td>
<td>2%</td>
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</tr>
<tr>
<td><strong>Not Employed / Not Looking TOTAL</strong></td>
<td>39%</td>
<td>36%</td>
<td><strong>6.1 million</strong></td>
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<tr>
<td>Retired</td>
<td>16%</td>
<td>19%</td>
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<tr>
<td>Don’t Work</td>
<td>3%</td>
<td>3%</td>
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<tr>
<td>Home Duties</td>
<td>12%</td>
<td>7.5%</td>
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<tr>
<td>Students</td>
<td>8%</td>
<td>6.5%</td>
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<tr>
<td><strong>TOTAL POPULATION 14+</strong></td>
<td>100%</td>
<td>100%</td>
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</tbody>
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Base Aust Population aged 14+; Source: Roy Morgan Research (10M)

**4% (an estimated 700,000 people) are under-employed, looking for full time work or additional hours.**