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# THE SOCIAL BAROMETER (from 1974 to 1996) FROM WHITLAM TO KEATING

Some comparisons of changes in Australian values and social attitudes 1974 -1996

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Surveys conducted by the Roy Morgan Research Centre (Gallup International Affiliate in Australia & New Zealand)©1996

# INTRODUCTION

The Australian Social Barometer was initially undertaken by Probe Pty Ltd in 1973/74 and updated by the Roy Morgan Research Centre late in 1977. The Social Barometer is designed to present an in depth analysis of the long term stability (and the changes) in Australian values . As such it provides a unique measure of the pattern of expectations from the end of the Whitlam Government to the end of the Keating Government.

The 1996 Social Barometer introduces the first MindSet<sup>™</sup> profile of Australia's social, political and commercial expectations. This is based on the six-dimensional sociographic framework and the Roy Morgan Values Segments\*© developed in conjunction with Colin Benjamin of The Horizons Network.

This document presents an overview of the significant changes that have occurred over the twenty years and at the same time confirms the core values that underpin the Roy Morgan Values Segments\*. Later reports will provide product usage and media preferences in terms of psychographic quintiles on a wide range of dimensions relevant to marketing priorities.

Demographic profiles present the numbers of people who hold particular attitudes and opinions; psychographic segments identify the dominant mental profiles of sections of the population who share similar values. The MindSet<sup>TM</sup> profiles establish the inter-relationship between the sociographic drivers of change and choice based upon repeating socio-cultural patterns of response rather than psychological elements. Together these instruments offer a unique insight into the mind and expectations of the Australian consumer.

The Social Barometer® is presented in two sections:

- (I) The profile of increases and decreases over the twenty years from Whitlam to Keating
- (II) The Sociographic profile of the items that have changed significantly over the two decades, indicating the differences that make a difference within the pattern of Australian's responses to traditions and innovation.

### POLITICAL AND SOCIAL ISSUES IN AUSTRALIA

There have been a large number of significant changes in people's attitude to political and social issues in Australia.

There are signficantly more people in favour of a number of issues namely:

- (1) Tighter control of foreign investment into Australia (4.04)
- (2) Tighter control of multi-nationals by the government(3.78)
- (3) Stricter control on pornographic material (3.78)
- (4) Easier availability of birth control pills (3.77)
- (5) Death penalty for committing murder (3.59)
- (6) The workers having an equal say in running the industry they work in (3.56)
- (7) Sex before marriage (3.32)
- (8) Australia becoming a republic independent of England (3.22)
- (9) Higher rates of tax on large income earners (3.15)
- (10) A 35 hour week for everybody (3.12)

There has been a **large increase** in the number of people in favour of tighter control of multi-nationals by the government (up from 3.52 to 3.78), free love (up from 2.57 to 2.67) and cuts in government spending on pensions and other social service payments (up from 1.94 to 2.55) and moves to legalise marijuana smoking for adults (up from1.93 to a level of majority support with 2.57).

There has also been a **significant decrease in support for** power for the Federal Government to control prices and incomes(down from 3.51 to 2.97 and from 2.97 to 2.31), development of Australia's natural resources being in the hands of government (from 3.15 to 2.91) and government control of the big industries such as steel(down from 2.83 to 2.62). The post office remains an exception to the desire for less govenment involvement with support for a postal service run by free enterprise down from 3.28 to 2.78. Whilst a majority of the population would favour tax cuts for everyone there has been a slight reduction in the level of support for widespread cuts in taxes for everybody (down from 3.63 to 3.52).

# There is **decreasing level of support** for:

- (1) Moves to greater decentralisation (3.89 to 3.47)
- (2) Doctors being allowed to work free from government interference(3.72 to 3.27)

#### THE WORLD AROUND US

There have been a limited number of significant changes in people's attitudes towards the world around us.

# There are more people who agree with statements:

- (1) It is bad for your health to work in a place that is air-conditioned all the time (up from 3.41 to 3.61)
- (2) Because they allow more people to get housing cheaply-home units are a good thing (up from 3.11 to 3.40)
- (3) I often read consumer reports or similar publications about a product before I go and buy a particular brand (3.22 to 3.29)
- (3) Our coastal islands should not be developed as tourist resorts (up from 2.89 to 3.22)
- (5) We should start planning now for the society without motor cars (up from 3.00 to 3.02)
- (6) Most products you buy are well enough described on the package (up from 2.68 to 2.99)
- (7) Australia doesn't need consumer protection laws any more powerful than the present laws (up from 2.52 to 2.74)

# There is **decreasing level of support** for:

- (1) None of our Australian buildings are old enough to be worth preserving (1.98 down to 1.80)
- (2) In general, life in the big city is far more interesting than nature could ever be (from 1.98 to 1.95)
- (3) Australia is the last country that should worry about over-population (down from 2.68 to 2.21)
- (4) I prefer to buy drinks in throw away containers (2.74 to 2.51)
- (5) Jet aircraft are worth all the noise and pollution they make (from 2.97 to 2.91)
- (6) When houses are built in a new area, they should be built around the trees, not cut the trees down (from 4.00 to 3.89)
- (7) Cars, washing machines, refrigerators, etc. should be made to last even if it adds to the cost of the car (4.19 to 4.06)

### ATTITUDES TOWARDS OUR SOCIETY

Australians are showing increasing contradictions in their response to saving with a personal willingness to spend more, see inflation as more under control and at the same time believe that saving aways pays off in the end (up from 3,86 to 3.90). Holding the view that "the only way to get anything worthwhile is to save for it" (down a little from 3.98 to 3.83), there is a belief that children should be taught the virtues of saving,(4.12 to 4.14) and increasingly see the benefit of saving ("I don't see any benefit in saving money (2.00 down to 1.95). At the same time there is the philosophy "here today - gone tomorrow is my philosophy with money" (up from 2.33 to 2.46) and "If you have got it, why not spend it" (up from 2.45 to 2.51).

There has been an overall increase in tolerance of differences within our society, although there has been a significant increase in concern about sex crimes such as rape and attacks on children. Australians are now more likely to believe that this type of crime deserves more than imprisonment, such criminals ought to be public whipped or worse (up from 2.94 to 3.47) There has been a dramatic decrease in the number who believe that "sex crimes such as rape and attacks on children are signs of mental illness, such people belong in hospitals rather than prisons" (down from 3.36 to 2.54) and a related decrease in tolerance of sex offenders with only minority support now for the view that "People who want to whip or imprison sex criminals are themselves sick" (down from 2.51 to 2.31).

# More people now agree that:

- (1) Homosexuality between consenting adults may be distasteful but it should not be regarded as a crime (up from 3.58 to 3.72)
- (2) No sane, normal, decent person would ever think of hurting a close friend or relative(up from 3.41 to 3.54)
- (3) Human nature is basically cooperative (up from 3.49 to 3.52)
- (4) You can' take it with you so you might as well enjoy yourself (2.98 to 3.04)
- (5) Insults to our honour are not always important enough to bother about (2.90 to 2.92)
- (6) Most people are more inclined to help others than to look out for themselves (Up from 2.66 to 2.76)
- (7) It's alright for people to raise questions about even the most personal and private matters( up from 2.49 to 2.70)

# ATTITUDES TOWARDS OUR SOCIETY (continued)

# There is **decreasing level of agreement** that:

- (1) Homosexuals are hardly better than sex criminals and ought to be severely punished (down from 2,24 to 2.09)
- (2) There is hardly anything lower than a person who does not feel great love, gratitide and respect for his parents (from 2.52 to 2.35)
- (3) No one is going to care much what happens to you when you get right down to it ( down from 3.04 to 2.94)
- (4) A man needs financial security before he marries (3.62 to 3.16)
- (5) Many of the radical ideas of today will be the accepted practices of tomorrow (down from 3.48 to 3.39)
- (6) Obedience and respect for authority are the most important virtues children should learn (from 3.69 to 3.47)
- (8) What the young need most is strict discipline, rugged determination and the will to work and fight for family and country (down from 3.49 to 3.45)
- (9) You can't be too careful in your dealings with other people (down from 3.71 to 3.66)
- (10) Young people sometimes get rebellious ideas but as they grow up they ought to get over them and settle down( from 3.70 to 3.69)

There has been no significant change in support for the view that "If you don't watch yourself, people will take advantage of you" (3.67) or that "Most honest people admit to themselves that they have sometimes hated their parents" (3.34)

### LEVEL OF SATISFACTION WITH GOVERNMENT ACTIONS

The level of satisfaction with political institutions in Australia is low (the mean scores tend to fall between 'neither satisfied nor dissatisfied'). There are signficantly more people **satisfied** than dissatisfied on a number of issues namely:

- (1) Quality of the Postal Service (3.90)
- (2) The standard of the Police Force(3.21)
- (3) The work done by the Public Service (3.08)
- (4) The housing and land situation (2.97)
- (5) The perfomance of your State Government (2.73)
- (6) Existing conditions for Aborigines(2.63)
- (7) The political direction in which Australia is heading (2.69)
- (8) Present cost of living (2.69)

There has been a large increase in the level of satisfaction with attempts to control inflation (up from 1.94 to 2.55).

There has also been a **significant decrease in satisfaction** with medical facilties and services (down from 3.28 to 3.09), opportunities for employment( from 2.78 to 2.61) and existing laws on the immigration of Asians (3.10 to 2.56) although a majority of the population are still in favour of the current situation.

There is a **decreasing level of satisfaction** with the existing level of foreign ownership of Australian industry (2.47 down significantly to 1.98) and Youth and its values (3.05 to 2.46) as well as less dramatic reductions in attitudes to government:

- (1) The quality of the parliamentary opposition(2.65 to 2.56)
- (2) The quality of political leadership (2.52 to 2.46)
- (3) The amount of government secrecy(2.66 to 2.31)

Note: The (score) represents the 1996 average (mean score) on a scale where 5 = very satisfied and 1 = very dissatisfied.

#### ATTITUDES TOWARDS AUSTRALIA

There have been a large number of significant changes in people's attitude towards Australia, with an overall increase in acceptance that the country is a great place to live and a decrease in the cultural cringe. There is still a strong belief that Australia is the lucky country, although this sentiment is slightly less widely supported (down from 4.03 to 3.91)

# More people agree that:

- (1) If I ever left Australia I would always want to come back (up from 4.25 to 4.35)
- (2) Australia has one of the best climates in the world (up from 3.85 to 3.94)
- (3) Australia must be a good place or all the migrants wouldn't want to come here (up from 3.64 to 3.88)
- (4) Not many other coutries have the advantages Australia has (up from 3.82 to 3.86)
- (5) The Australian way of doing things is hard to beat (up from 3.25 to 3.41)

# There is **decreasing level of agreement** that:

- (1) Australians are crude and uncultured(2.37 down to 2.31)
- (2) Most of what is good in Australia has been borrowed from overseas (down from 2,52 to 2.35)
- (2) Anyone who wants to get on has to go overseas rather than stay in Australia (from 2.51 to 2.39)
- (3) The basic trouble with Australians is their lack of imagination and stick-in-the-mud attitudes (2.78 to 2.62)
- (4) Australia always seems to be at least 5 years behind anywhere else (down from 2.83 to 2.67)

#### ATITUDES TOWARDS THE FAMILY

People are more proud of their family (from 4.45 to 4.48) but a majority now feel that lately the family has tended to grow away from one another (up from 2.40 to 2.54) Overall the family is still a major source of support with people less likely to agree "we're not as close as we used to be in our family" (3.12 down to 3.09), and strong support for the proposition that "I think about my family above everything else' (3.98 to 3.91).

# More people **agree** that:

- (1) Our family has always been a close knit unit (up from 3.75 to 3.76)
- (2) Our family discusses a lot of things together (up from 3.60 to 3.64)
- (3) Australia must be a good place or all the migrants wouldn't want to come here (up from 3.64 to 3.88)
- (4) Not many other coutries have the advantages Australia has (up from 3.82 to 3.86)
- (5) The Australian way of doing things is hard to beat (up from 3.25 to 3.41)

There has been a slight decrease in the extent the people agree "we always cooperate with one another in our family" (3.59 to 3.53).

# There is **decreasing level of agreement** that:

- (1) I sometimes feel like a stranger in my family (2.02 down to 2.01)
- (2) Family life can be terribly dull and boring (2.25 down to 2.14)
- (3) Family life is not what it used to ber (3.26)
- (4) Our family does a lot of things together (3.60 down to 3.40)
- (5) We don't seem to go out together very often in our family (down

#### OUR WAY OF LIFE

There has been a significant overall shift towards greater ranges of life experiences and excitement and more challenges to conventional patterns of behaviour, especially by the younger sections of the community.

### More people agree that:

- (1) I enjoy many types of foreign food (up from 3.38 to 3.88)
- (2) I am attracted to antiques and things of the past (3.82 to 3.45)
- (3) I am always ready to try new and different products which come onto the market( up from 3.20 to 3.29)
- (4) I am diet and weight conscious (up from 2.92 to 3.27)
- (5) I find it more pleasant to watch TV in the evenings than to make the effort and go out to a show (up from 2.91 to 2.94)
- (6) I look for new experiences every day (up from 2.85 to 2.92)
- (7) I don't like speed (up from 2.68 to 2.83)
- (8) I prefer friends who are exciting and unpredictable (2.71 to 2.77)
- (9) I am interested in the supernatural, astrology, the stars etc (up from 2.42 to 2.69)
- (10) I would like to make friends in some of the 'far-out' groups like artists or hippies (1.76 to 2.49)
- (11) I have tried marijuana or would like to (up from 1.53 to 2.40)
- (12) I would like to have new and exciting experiences even if they are a little frightening, unconventional or illegal (up from 2.09 to 2.35)
- (13) I often enjoy flouting irrational authority (up from 2.19 to 2.30)
- (14) I sometimes like to do crazy things just to see the effect they have on others (up from 2.11 to 2.25)
- (15) I would like to try some of the new drugs that produce hallucinations (up from 1.24 to 1.35)

# There is decreasing level of agreement that:

- (1) I am attracted to simplicity and natural living (from 3.82 to 3.45)
- (2) Religion is an important thing in my life (down from 2.94 to 2.84)
- (3) I can 't understand what makes people want to climb mountains (down from 2.90 to 2.82)
- (4) I don't think that I would like to live for a while in a foreign country (down from 2.86 to 2.49)
- (5) I think I would be upset if a person of another race married my son or daughter (from 2.75 to 2.23)
- (6) Trying out new products is usually a waste of time (2.23 to 2.12)

Note: The (score) represents the 1996 average (mean score) on a scale where 5 =Yes, for sure and 1 =Definitely no.

#### **FASHION**

There has been a significant reduction in people's interest in fashion with a majority of respondents saying "I dont' find fashion particularly exciting". There is a **very high levels of support** for the proposition that "It's stupid to spend a lot of money on clothes if they are only going to be out of date in a year's time (4.04).

# There has been a significant decrease in support for fashion statements:

- (1) Good grooming is a sign of self respect (from 4.26 to 4.04)
- (2) I usually appear well dressed when I go out (4.10 to 3.97)
- (3) I like to look attractive to the opposite sex (from 3.92 to 3.54)
- (4) Clothes and makeup are not important to me (3.07to 2.86)
- (5) An important part of life and activities is dressing smartly (from 3.20 to 2.78)
- (6) I am not very fashion conscious (from 2.94 to 2.90)
- (7) I enjoy looking through fashion magazines (from 3.41 to 2.68)

# A majority of Australians in 1996 agree with statements such as

- (1) I like reasonable quality which lasts but I don't want to spend a lot for it (80% support)
- (2) I like to look neat and tidy but I'm not overly concerned with fashion(77% support)
- (3) I prefer a more casual style of dress to suit my lifestyle(75%)
- (4) I don't have a great deal to spend on myself (72% support)
- (5) I tend to spend my money on a few good pieces rather than on lots of outfits (60% suppport)
- (6) I prefera more structured, classic style of dress which doesn't date (55% support)
- (7) I prefer to spend more on my "going out" clothes than my workwear (53% suppport)
- (8) For work I prefer a more structured classic style but on the weekends its mostly casual (50% support)

While there has been an increase in the number of people indicating that "clothes are a waste of money "(2.03 to 2.35) this still represents only 14% of the total population. 76% do not agree with the statement "I tend to change my look often, so I have a pretty diverse wardrobe". Only 35% agree "as far as I can afford it, I like to look fashionable" and less than 10% agress with the proposition that -"I would enjoy being a fashion model".

#### THE WORLD AT HOME

There have been a large number of significant changes in grocery buyers' perceptions. More grocery buyers agree with the statement "I try hard not to serve foods high in cholesterol (3.51 to 3.82)" but there have b een a large reduction in support for other items including saving recipes from newspapers and magazines ((3.58 down to 3.36) and "I enjoy going shopping" (3.57 down to 3.39).

# There is decreasing level of agreement that:

- (1) My family eats good food all the time (4.22 to 3.87)
- (2) When it comes to a choice between nutrition and taste in the food I prepare, nutrition is more important.(3.68 to 3.64)
- (3) I love to cook (3.62 to 3.61)
- (4) People often complement me on my cooking (3.66 to 3.55)
- (5) I am proud of my kitchen (3.82 to 3.51)
- (6) I enjoy going shopping (3.57to 3.39)
- (7) I save recipes from newspapers and magazines (3.58 to 3.36)
- (8) I go to a lot of trouble to make food look attractive (3.45 to 3.34)

Less than half of the grocery buyers now agree with the following statements

- (1) I am not interested in making spices, seasoning and sauces for food (2.64 to 2.48)
- (2) A home is not a very important part of life (3.07 to 2.15)
- (3) I often used canned foods with the evening meal (2.40 to 2.08)

These results suggest that concern with the quality of family food is still important but that time saving in preparation and use of preprepared meals and ready to eat quality meals will gain increasing acceptance.

# ABOUT YOURSELF (WOMEN ONLY)

There have been a number of significant changes in women's views of themselves over the two decades with more women saying "women worry too much about makeup these days" (3.24 to 3.56) There appears to be less pressure to accept cosmetics as a determinant of self image.

This change reflects a growing self confidence reflected in declines in most of the statements in this category including "I try to buy the best quality products for my skin" (3.45 down to 2.51) and "It is not important to me to look slim" (3.00 to 2.82)

# There is **decreasing level of agreement** that:

- (1 I like to keep fit (4.14 to 3.89)
- (2) I am conscious of preserving my looks (4.04 to 3.65)
- (3) I try to keep myself young looking(3.88 to 3.36)
- (4 It is not important to me to look slim (3.58 to 3.36)
- (5) If my hair doesn't look good nothing else looks good (3.79 to 3.08)
- (6) I don't pay a lot of attention to the soap and shampoo that I buy (3.08 to 2.83)

Women are much less likely to accept statements such as

- (1) I try to buy the best quality products for my skin (3.45 to 2.51)
- (2) I often buy hairstyle and makeup books (1.75 to 1.51)

Applying The MindSet<sup>TM</sup> to the Kahle Scale List of Values:

The nine List of Values categories developed by Lynn Kahle are compared with the Roy Morgan Values Segments\* developed in conjunction with Colin Benjamin - The Horizons Network.

Comparisons of the List of Values against the SRI VALS 1 model indicated that it was simpler and more effective as a marketing tool. This study indicates the relationship between the List of Values model and the Horizons Network model.

In each value segment, the index (100) is used to establish the relative degree of support between the Roy Morgan Values Segments\* and the Most important and Least Important item from the List of Values.

It can be seen that the two are complementary and provide background interpretative material for marketing and policy analysis.

BEING WELL RESPECTED for example, is strongly associated with the traditional and cautious end of the MindSet<sup>TM</sup> and negatively associated with the progressive and innovative end of the MindSet's horizontal dimensions.

MindSet<sup>TM</sup> Profile® for (Index = 100)I Individual **BEING WELL RESPECTED** High Quality m = Most important High Q.O.L. L = Least important Visible Achievement 25m 66L Something Better 49m 125L Basic Needs :Real Conservatism Traditional Family Life Young Optimism Socially Aware 284m :176m 218m 32m: 61m 50L :62L 39L 94m: 182L :136L 67L Conventional Family Life: Look at Me 120m 123L A Fairer Deal 100m 131L Collective Low Quality I Low Q.O.L **Traditional** Progressive

Low Price/Unit

Cautious about new ideas

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High Price/Unit

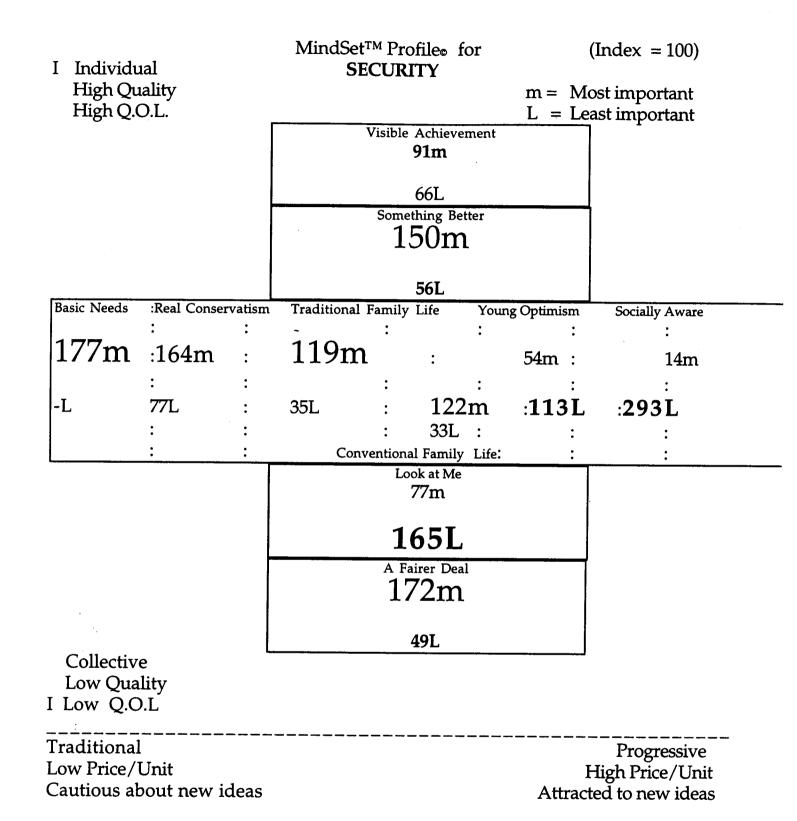
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MindSet™ Profile<sup>®</sup> for (Index = 100)I Individual SELF FULFILMENT High Quality m = Most important High Q.O.L. L = Least important Visible Achievement 102<sub>m</sub> 63L Something Better 101m 31L Basic Needs :Real Conservatism Traditional Family Life Young Optimism Socially Aware 176m 95m 82m : 82m: 48m 218L :218L 72L 74m: 15L 23L 97L Conventional Family Life: Look at Me 52L A Fairer Deal 91m 385L Collective Low Quality I Low Q.O.L **Traditional** Progressive Low Price/Unit High Price/Unit

Cautious about new ideas

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Attracted to new ideas

MindSet™ Profile for (Index = 100)I Individual SENSE OF ACCOMPLISHMENT High Quality m = Most important High Q.O.L. L = Least important Visible Achievement 145m 89L Something Better 73m 125L Basic Needs :Real Conservatism Traditional Family Life Young Optimism Socially Aware 273m 104m 63m : 36m 22m: 196L 98L :44L 81L 65m: :-L 145L Conventional Family Life: Look at Me 85m 31L A Fairer Deal 71m 204L Collective Low Quality I Low Q.O.L

Traditional
Low Price/Unit
Cautious about new ideas

Progressive High Price/Unit Attracted to new ideas

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100	:	:	100	:	:	:	:		
102m	:51m :		130m	:		1361	<b>m</b> :99m		
	:	:		:	:	:	:		
448L	:69L	•	76L	:106m		70L :	52L		
	.072	•	70L			70L .	32L		
	:	:		:195L	:	:	:		
	•	: -	Conve	entional Family	Life:	:	:		
				Look at Me 68m					
				Oom			1.		
				73L					
		-		A Fairer Dea	1		┥		
				78m					
		L		64L					
Collectiv									
Low Qua	-								
I Low Q.C	).L								
Traditional									
Traditional							Progressive		
Low Price/Cautious al		idoss				۸ الم	High Price/Unit		
Caunous al	bout Hew	iueas				Attra	cted to new ideas		

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MindSet™ Profile® for (Index = 100)I Individual **SELF RESPECT** High Quality m = Most important High Q.O.L. L = Least important Visible Achievement 126m Something Better 106m 82L Basic Needs :Real Conservatism Traditional Family Life Young Optimism Socially Aware :112m 91m 57m 111m 72m 164L :105m :-L 322L Conventional Family Life: Look at Me 104m 123L A Fairer Deal 91m 262L Collective Low Quality I Low O.O.L **Traditional** Progressive Low Price/Unit High Price/Unit

Cautious about new ideas

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Attracted to new ideas