

***Sorting Fad from Fact: Understanding the
Trends, Issues and Changes that Impact on
Community***

*Communities in Control 2008
Melbourne, Australia
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**By Michele Levine
Chief Executive
Roy Morgan Research**



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Australia is facing an increasingly complex social environment that is changing both the level of demand for its products and services, and the climate of support for those products and services.

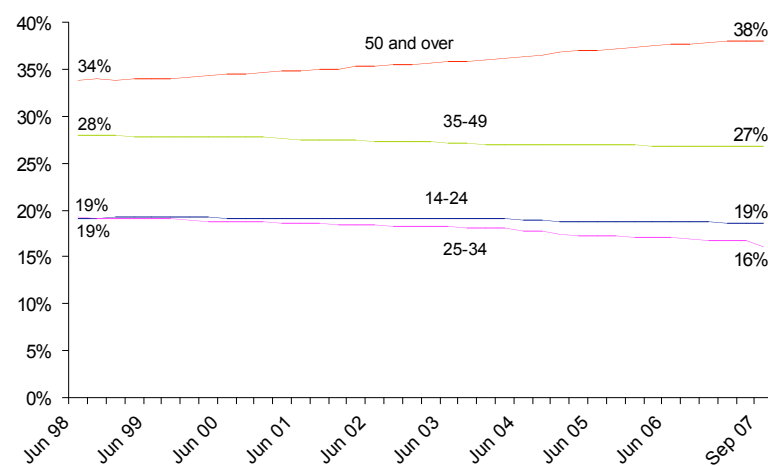
The trends are clear.

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Society

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Society Ageing Population

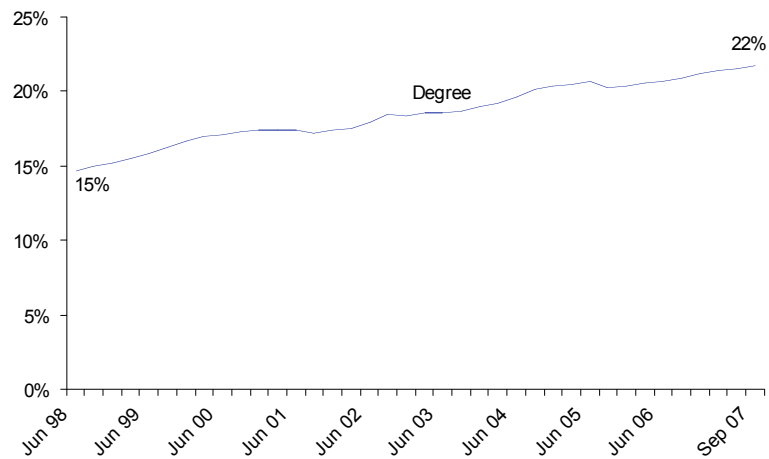


Base: Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Rising Education Level



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Rising Wealth and Debt

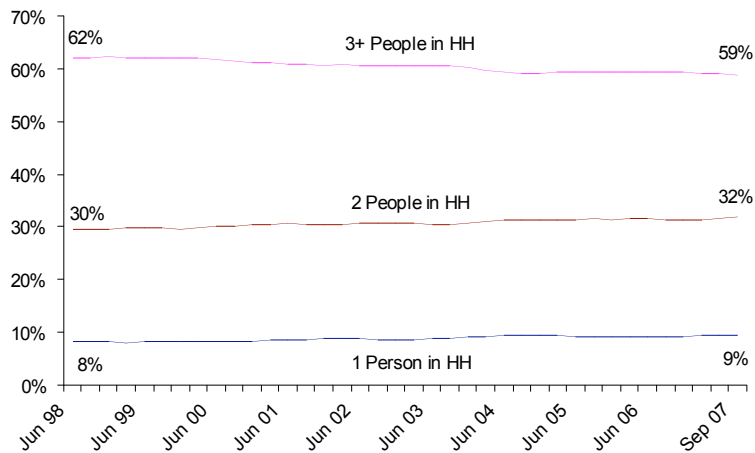
Housing Loan Outstanding	1997-2007, increased 327%
Credit Card Outstanding	1997-2007, increased 412%
Superannuation Saving	1997-2007, increased 269%

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

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Household Size Decreasing

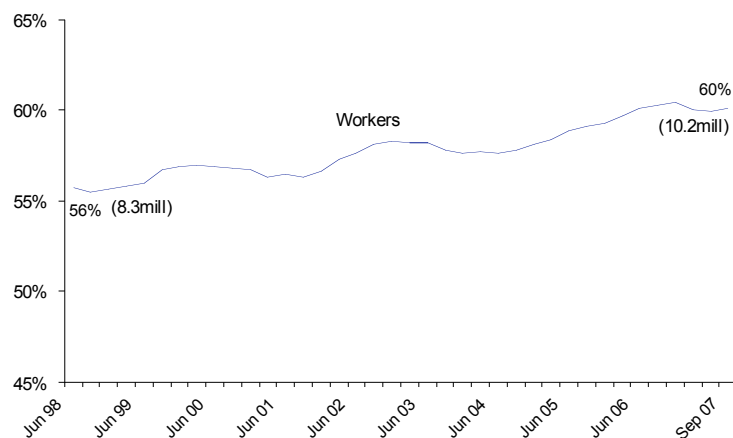


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Real Growth in Employment

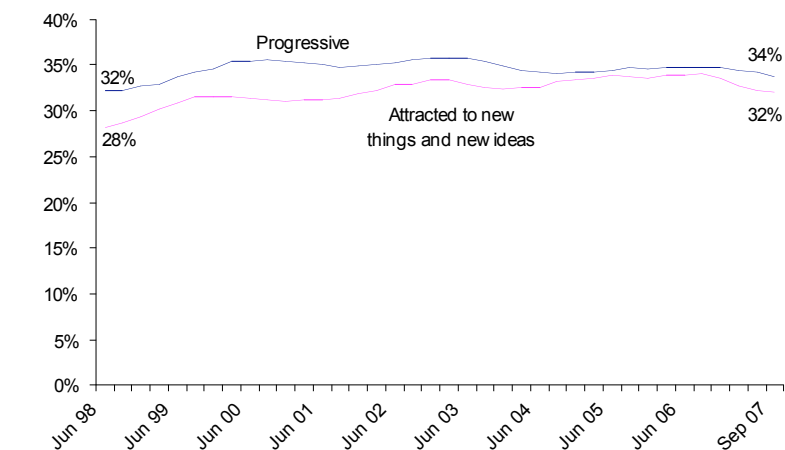


Base Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Australians Becoming More Progressive

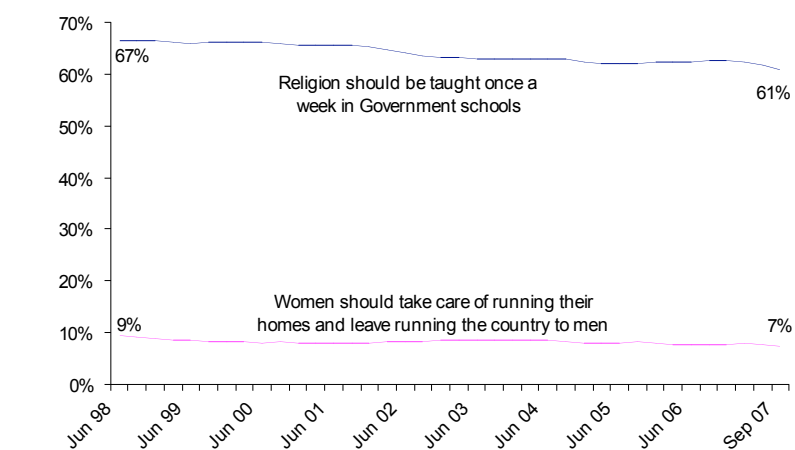


Base Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Australians Becoming More Progressive

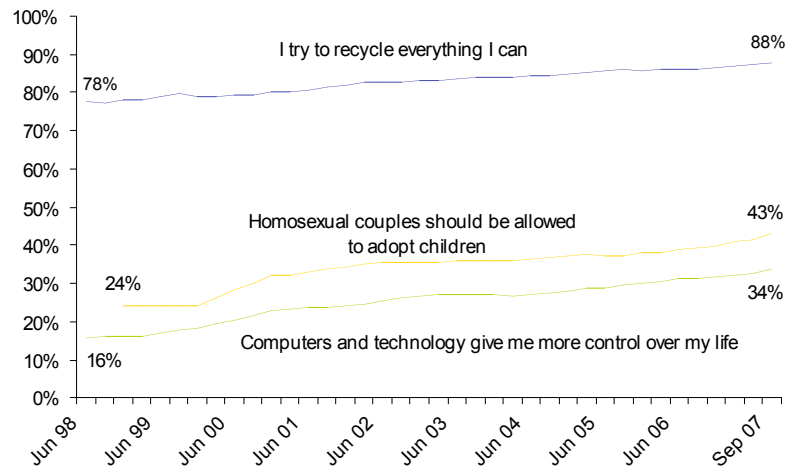


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Australians Becoming More Progressive

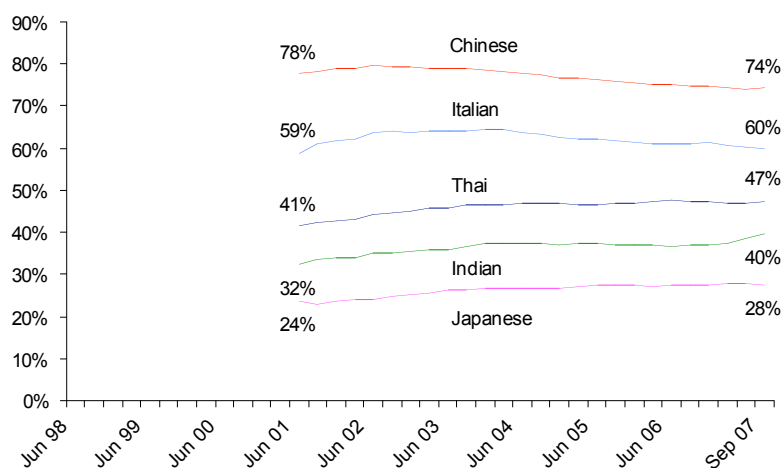


Base Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Food and Health

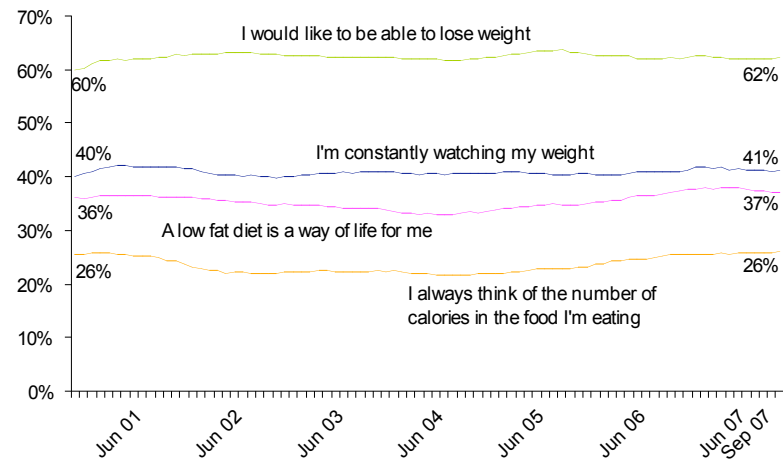


Base Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Society Food and Health

Discover your edge

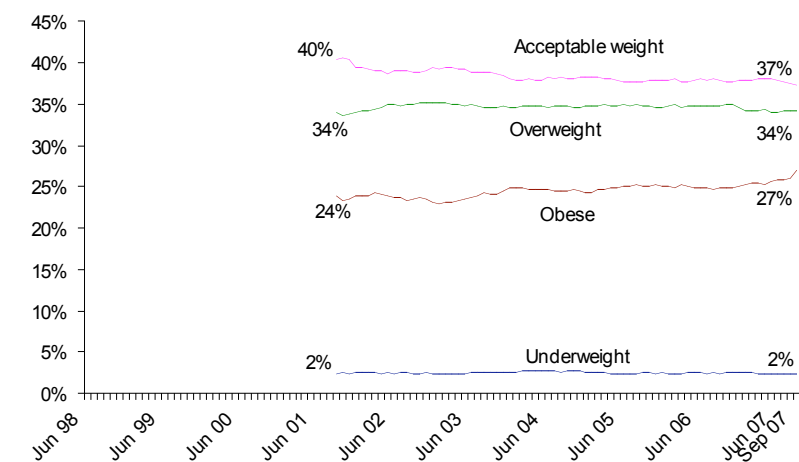


Base Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Society BMI

Discover your edge



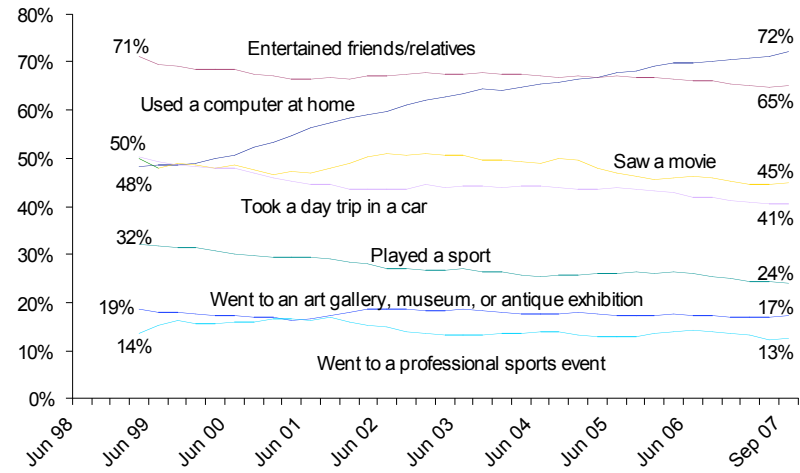
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Changing Leisure Activities

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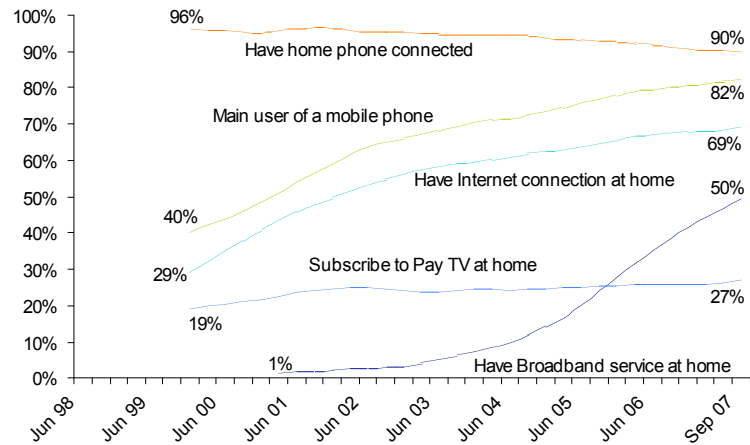
Technology

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Technology

Mobile and Internet, particularly Broadband Increase

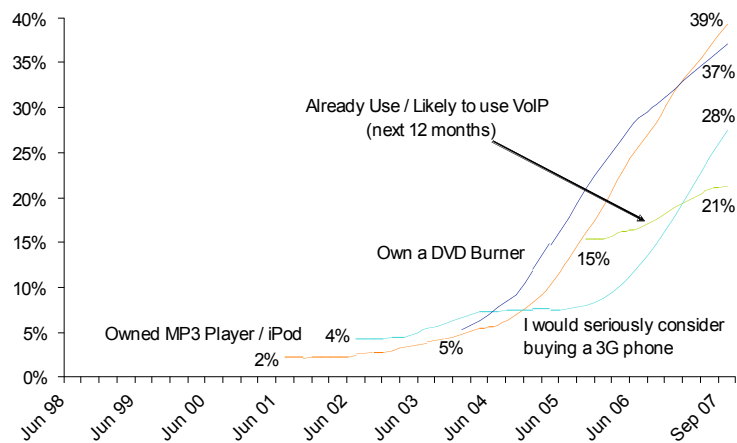


Base Aust Population aged 14+. Source: Roy Morgan Research (TECH)

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Technology

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

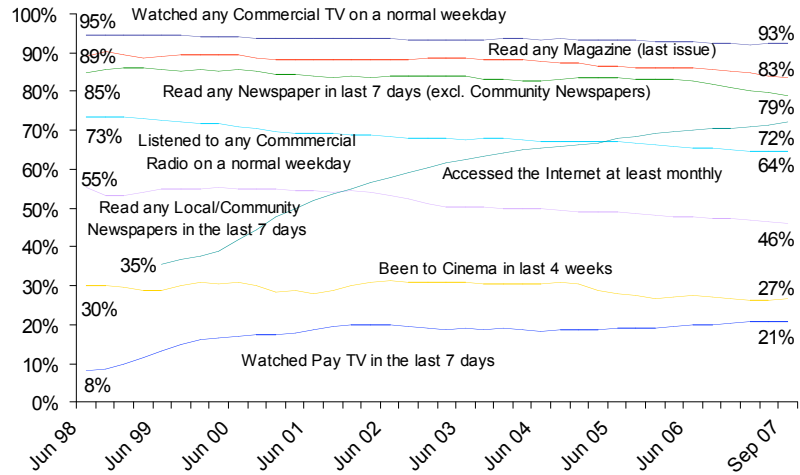


Base Aust Population aged 14+. Source: Roy Morgan Research (TECH)

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Technology Media Consumption Over Time

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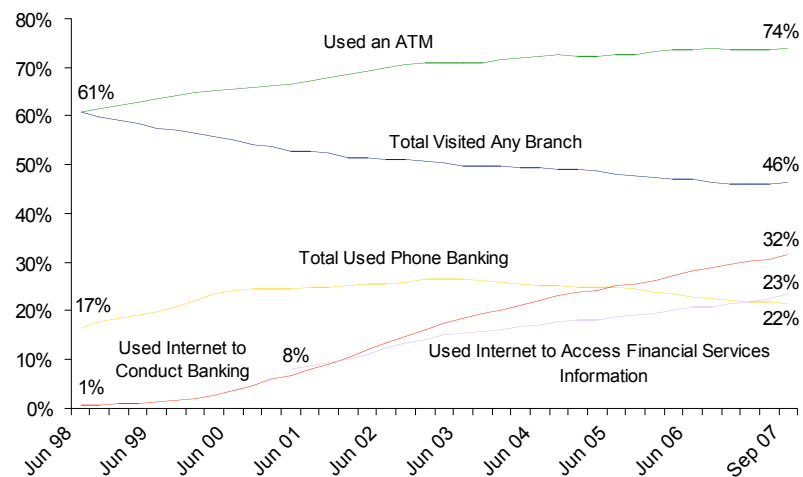


Base Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Technology Technology and Banking

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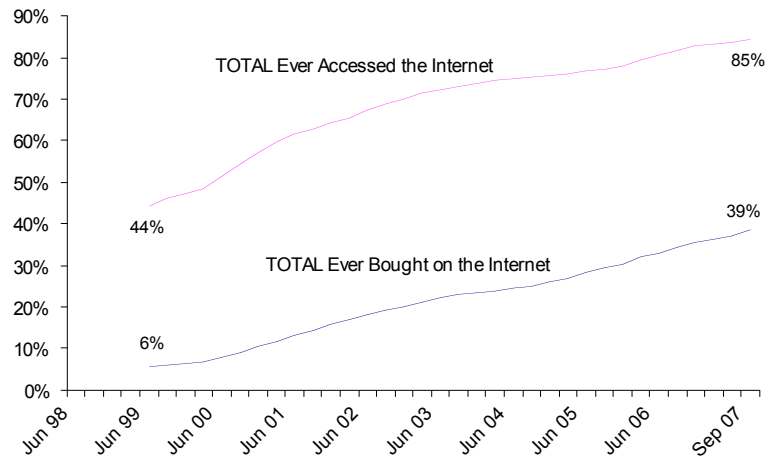


Base Aust Population aged 14+. Source: Roy Morgan Research (Finance)

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Technology Shopping on the Internet

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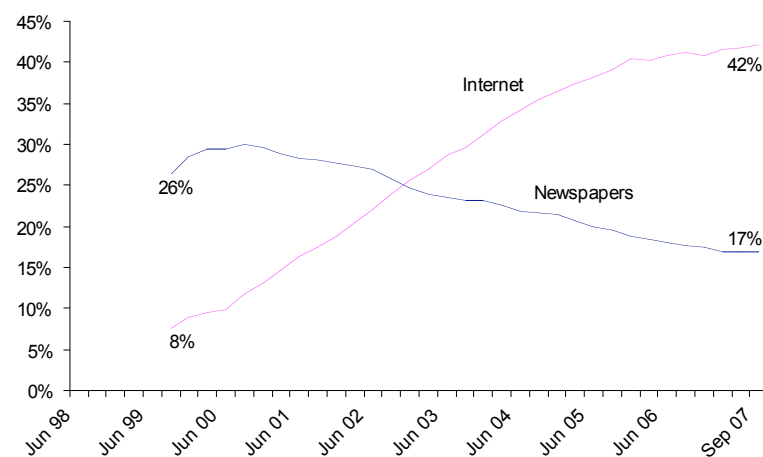


Base: Aust Population aged 14+; Source: Roy Morgan Research (10M)

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Retail and the Internet Media Most Useful for Purchasing - Travel

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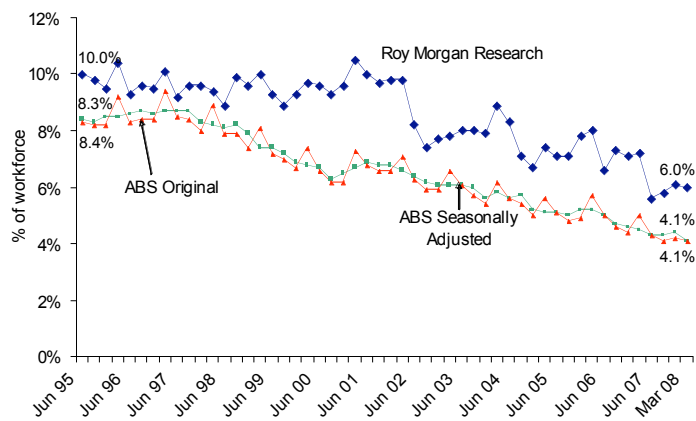
Base: Aust Population aged 14+; Source: Roy Morgan Research (10M)

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Economy

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Economy Unemployment

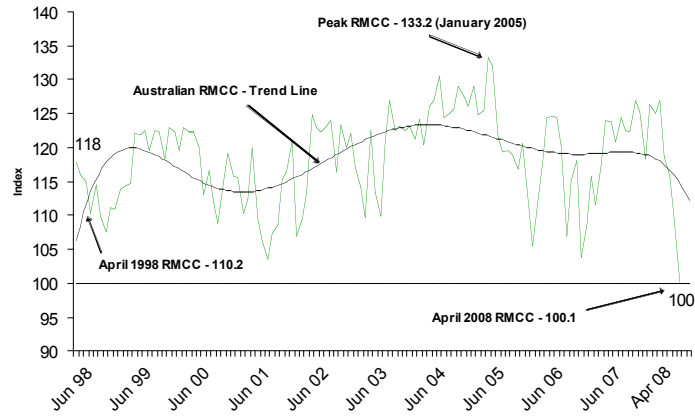


Base: ABS Quarterly Average June Quarter 2007, Roy Morgan Quarterly Estimate (MP)

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Economy

Roy Morgan Consumer Confidence

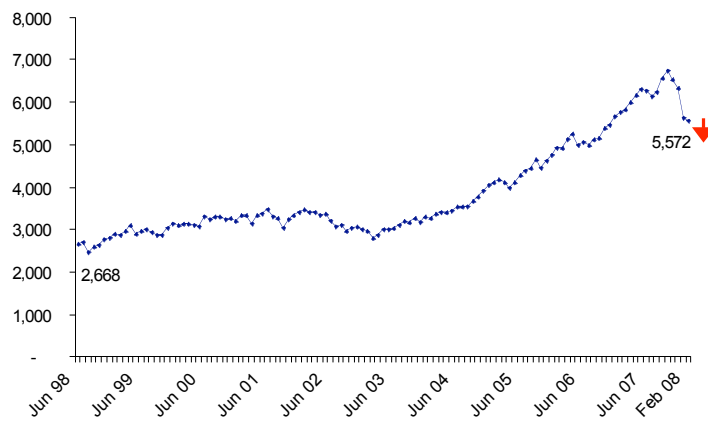


Base: Aust Population aged 14+. Source: Roy Morgan Research (MP)

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Economy

Share Market Declines

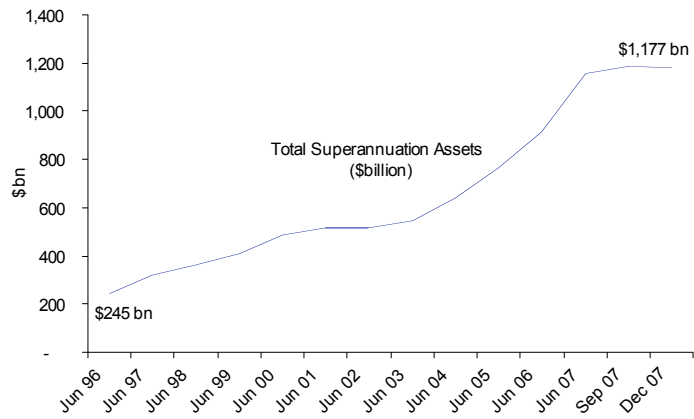


Source: Reserve Bank of Australia

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Economy

Total Superannuation Assets



Source: APRA

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Politics

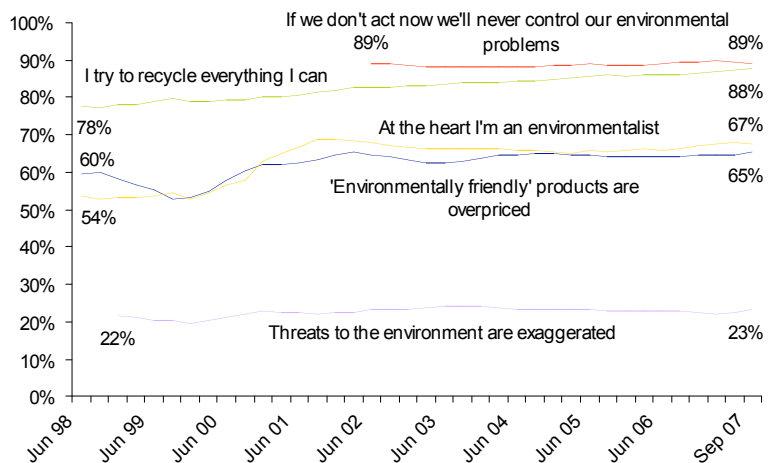
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Environment

Environment as an Issue has come of Age

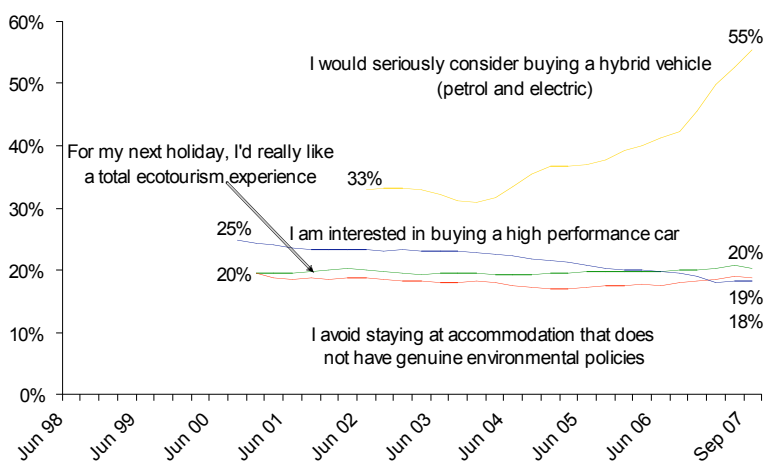


Base Aust Population aged 14+. Source: Roy Morgan Research (10M)

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Environment

But Taking Action is the Next Step...



Base Aust Population aged 14+. Source: Roy Morgan Research (AUTO)

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“There’ve been huge changes in the last ten years...just seems to be accelerating the changes.”

“And things are immediate now. Everyone wants things right now.”

“Everybody is in a hurry. Everybody has to have something on. If you don’t have something on, then you are nobody. You have got to have a full dance card or you are a wallflower.”

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"It's the reverse, the more affluent the less happy people are. No, they are disconnected. That's what it is too far. It's a sense of community (that's lost)."

"I think the fact now that people are working 60 plus hours a week, and not having enough time with their family and are getting burnt out by the time they reach 45, I think that's going to turn around."

"There's no sense of neighbourhood, is there?"

"I think it sometimes gets a bit hard too, with how many people are working in the house. If both parents are working, you don't get to understand or meet the rest of your community because you are always at work. So that sort of thing has changed. In years gone by a lot of the times the mother would be home and they would keep the community going. But I think that has changed a lot."

"Probably a bit more isolated, I would say."

Convergence or crossroads of two revolutions:

- *Technological revolution*
- *Cultural revolution*

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