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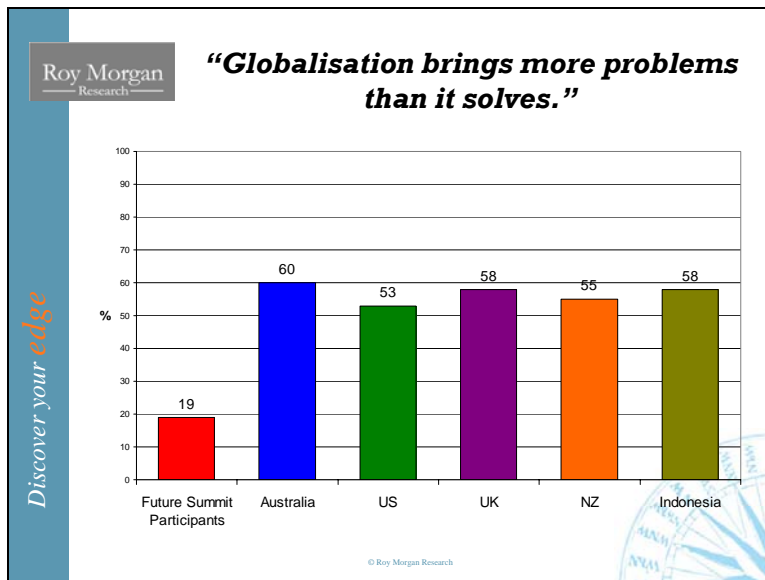
The Value of Listening to People

**Future Summit 2006
Brisbane, Australia
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**Presented by
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Melbourne, Australia**

Roy Morgan Research is pleased to be the Knowledge Partner for the Future Summit. We appreciate the opportunity to speak first and set the scene - not with our own views but with the views of the Australian people. Today we will share with you what we have learned about what the Australian people think of such issues as the environment, globalisation, corruption, how this compares with the views of people from the US, UK, New Zealand and Indonesia, and how these views compare with the views of the unique group of participants at this Future Summit 2006.

“Globalisation brings more problems than it solves” according to the majority of Australians (60%) and indeed a majority of people in the US, the UK, NZ and Indonesia. However, this is a view held by only 19% of Future Summit Participants¹.



The majority of Australians (57%) believe *“Corruption is one of the major problems facing this country”*. Only 16% of Future Summit Participants agree.

¹ Roy Morgan Single Source Continuous Five Nation Study and Future Summit Participants Survey n=131

Six months ago the majority of Australians (52%) believed Terrorism, Wars, Security and Safety were the most important issues facing the world².

While the proportion of Australians who now believe Terrorism, Wars, Security and Safety issues are the most important issues has dropped from 52% to 32%, they are still the most common international problems cited by Australians³.

Future Summit Participants rated these issues much lower (14% cited them as the most important problems) – well below economic issues (27%) and environmental issues (26%).

These are dramatic differences and this is only the start. But before showing more of the data, and all the data is available for anyone who is interested, let me share with you why we believe listening is of fundamental importance.

I'm sure no-one here believes we should not be listening to people, but Roy Morgan Research has spent the last 60 plus years seeking out and recording the views of the people on every known topic, so we have given a lot of thought to why the views of the people matter.

- How people think and feel about events and situations is often more important to the outcome than the event itself.
- People want to be listened to.
- Accurate information is at the heart of democracy.
- Australia must be heard in the global arena.

How people think and feel about events and situations is often more important to the outcome than the event itself.

- Economists look at trends, the value of the \$, interest rates, price of commodities, etc, etc, and this explains/predicts a lot, but much much more is dependent on how people respond - Consumer Confidence.
- The share market analysts study charts and cycles, etc, etc, but it's all (mostly) dependent on how people respond. Do they like the stock? Is there a sell down that escalates into a meltdown, or a run on the stock that sends the price way over any real value?
- Major corporations have their technology ready to step up in the case of a pandemic (bird flu or the like) but what actually happens in such an event is more to do with how people respond. And it goes on...

²Paper, "World Issues, Australian Issues And Australian Infrastructure Challenges", prepared by Gary Morgan, Executive Chairman, and Michele Levine, Chief Executive, Roy Morgan Research Pty Ltd for presentation at the National Infrastructure Investment Leaders Summit, Melbourne, Australia, October 19, 2005
<http://www.roymorgan.com/resources/pdf/papers/20051001.pdf>

³ Morgan Poll No. 4018 "Security Concerns Wane As Government And Economic Concerns Rise To Prominence" Conducted for the 2006 Future Summit. Published exclusively in The Australian.
<http://www.roymorgan.com/news/polls/2006/4018/>

If you are in the business of marketing a new product, or idea, you had better understand your potential consumers, how they think, feel, and act, so you can best shape your product or idea to their 'world' view, or at the very least communicate it in a way that resonates with this.

All of us here today are grappling with major issues for the future, we are seeking to identify solutions, strategic intentions, visions. The issues are neither simple (a new car that stops faster) nor trivial (another product package that makes the user feel like new).

The issues are complex, important, and have long-term consequences for many generations to come. And the outcomes will depend so much on how people respond to the many and diverse stimuli that make up the context in which the issues occur and our future evolves.

So lest we create a future like the 101 (un) useless Japanese inventions⁴, we had better listen.

People want to be listened to.

All our experience tells us that people want to be listened to. Anyone here who has seen the weekly Roy Morgan Survey questionnaire will likely say "I would never do it", "I wouldn't waste my time answering all those questions". So why are we still in business?

The answer is simple. Generally people aren't listened to. Few people have an opportunity to give their views to a captive listener for an uninterrupted half an hour. And that's the point!

Roy Morgan always made this point.

In 1998, I presented a paper to CEDA entitled, "*The Mood of the People and the Election - Listen Carefully*"⁵. In 1998, I think the issue was "listening" - or the need to listen. In the aftermath of the June 1998 Queensland election in which Pauline Hanson's One Nation Party was recognised as a growing force, there was much talk of "listening to the people".

I pointed out that One Nation existed in 1998 because those who had lost, or feared loss, had no mechanism by which they could be heard.

"The buggers won't listen to me. You can ring up the radio stations and the politicians won't listen. (You can) write to parliamentarians and they don't reply. I feel left out, unlistened to and ostracised", said a Brisbane man in his late fifties.

"The Mood of the People - Listen Carefully"

⁴ 101 un useless Japanese Inventions: Kenji Kawakami, 1995, Harper Collins. The Best Seller from Japan on the Art of Chindogu

⁵ Paper, "The Mood of the People & the Election – Listen Carefully", presented to Committee for Economic Development of Australia, September 1, 1998, by Michele Levine, Chief Executive, Roy Morgan Research. <http://www.roymorgan.com/news/papers/1998/19981001/>

Today, there is much "listening activity" - we have institutionalised "listening" - politicians **listen** to their electorates, companies **listen** to their customers, some Company Boards **listen** to their shareholders - but do they respond to them? In 1999, Steve Bracks listened to and responded to the Victorian electorate and is now Premier⁶. Do most politicians listen and respond? Do Company Board members listen to their shareholders, understand them, really seek to make sense of what they are saying, take responsibility, and ask the questions their shareholders want them, and need them, to ask?

While it is relatively easy to listen, if we really want to understand and make sense of what people have to say, and be able to communicate with them and respond responsibly to them, we need to see the world from their perspective.

Somehow we are given the impression that the people that have to be listened to are a somewhat amorphous "mass" out there - people who are unlike "us", but otherwise relatively indistinguishable from each other.

The reality is of course quite different. There are all sorts of people, in different circumstances, with different backgrounds, beliefs and values. They have very different ways of viewing the world, and everything that goes on in the world.

Every one of us looks at the world through particular "windows" or mind sets, to help us make choices about our lives. We choose what we will do when we get up for the day, what we will wear, how and where we will travel, who we will talk to and what we hope to achieve by the end of the day.

Roy Morgan Research, in conjunction with Colin Benjamin of The Horizons Network, have developed a powerful values-based psychological instrument to understand the choices people make - in particular to provide a framework with which to understand people who are **not** just like us.

Our insight into these Roy Morgan Values Segments⁷ draws on analysis of the Roy Morgan Single Source database which includes detailed personal interviews with around 500,000 people across Australia over more than a decade (currently 120,000 interviews annually).

In your handouts today (see Appendix 3) is a map - a map with which to understand different people and ways of thinking. For instance if we consider the concept of technology:

⁶ Paper, "Only Real Leadership Or A Crisis Can Save The L-NP Coalition", Presented at the PricewaterhouseCoopers' Federal Budget Breakfast by Gary Morgan May 23, 2001, and Presented at Committee for Economic Development Budget Night presentation May 22,2001 by Michele Levine.

⁷ Developed in conjunction with Colin Benjamin of The Horizons Network (see attached).

- For the older “Basic Needs” segment, the concept of technology means medical technology, health monitoring and maintenance, security systems, and person-to-person contact. This is not surprising. From the Roy Morgan Political Issues Survey, health and hospital issues are for these people second in importance only to issues about social welfare and the aged.
- For the young carefree “Look At Me” segment, technology means entertainment, sound systems, leisure, and on-line games.
- For the disenfranchised “A Fairer Deal” segment technology means robotics, and fear of technology taking over jobs and controlling our lives.

If we consider the issue of politics for the two up-market segments:

- For the “Visible Achievement” segment, business is key, Government is too slow for the real world. This is the segment which showed the greatest support for the GST, and indeed most tax reform.
- For the “Socially Aware” segment, too much power is concentrated in the hands of large companies, global politics are of relevance.

The Values - Life Domain Map in all its richness enables you to know who to listen to, to listen carefully, and to communicate with people, even those who are different from you, about today’s and tomorrow’s issues in a way which resonates with their values.

Accurate information is at the heart of democracy.

At the heart of the Roy Morgan Research business is asking questions, recording and analysing the answers. For more than sixty years, with over 4 million interviews, more than 10,000 focussed discussion groups and in-depth interviews, Roy Morgan Research has been representing the views of Australians to Australians. This, of course, is at the heart of what Roy Morgan (the man) set out to do in the early 1940s.

"I have spent the best part of my life measuring public opinion. I believe people's views matter and that measuring public opinion is extremely important."

Just before he died in 1985, Roy Morgan was asked why measuring public opinion was important. His answer, which I agree with, was in three parts as follows:

“Firstly, to stop journalists from claiming to be able to write ‘The public demands, etc.,’ when they don't know what public opinion is on that particular subject.

Secondly, to identify the real question - the central ‘core’ of a problem. This forces people to face the problem. Public opinion polls not only do this, but also make sure that (by publication) the public and journalists know the problem and the public’s attitudes towards the issue (as percentages). This forces our leaders and the public to recognise the real problem and hopefully consider it.

Thirdly, publishing several times a year reasonably accurate percentages for voting intention. This created a continuous 'election atmosphere', rather than a phoney atmosphere created by so called 'leaders' and journalists."*

Of course today there are so many polls that in many ways polls aren't polls anymore. When we have polls by people messaging (SMS) their responses to vote for their favourite pop star or cricket club, it's really a money spinner rather than an independent poll designed to measure the nation's view. One of the Network Polls reported that 90% of people would attend the Industrial Relations Protest Rally – of course attendance was nothing like that.

Accurate information is at the heart of democracy today. In his 1990⁸ paper to the National Press Club '*Now There's Democracy in Russia – Australia Must be Next*', Gary Morgan said:

"Opinion polls and freedom of information are as essential a part of a democratic system as the freedom of speech. Of course, as with any freedom, freedom of information carries with it responsibilities:

- *Responsibility on the part of the **pollster** to conduct and report the research findings **honestly and accurately**;*
- *Responsibility on the part of the **journalists** to report the research **correctly**, in context, and **even-handedly**; and*
- *Responsibility of **political parties** and the **Government** to use this information **properly**, (not for agenda setting by alluding to private poll results which are never authenticated, and not misusing the information in polls)."*

Former Prime Minister Sir Robert Menzies in his second Dunrossil Memorial Lecture on March 12, 1968, spoke at length about public opinion polls (see insert). He made the following pertinent point:

"A political leader inevitably reads the published polls. He will learn much from them. But he is no leader if he is persuaded by them to follow a course which he would otherwise not approve. He will do better on appropriate occasions to say - 'Here is a popular error; I must do my best to correct it!'."

And Sir Robert Menzies, in a letter to Roy Morgan of April 4, 1968, said: "*Nobody knows better than I do that the endemic disease in politics is fear of public opinion*".

* Today, the Morgan Poll asks voting intention each week.

⁸ "*Now there's democracy in Russia – Australia must be next*" Address by Gary Morgan to The National Press Club, Canberra, July 11, 1990 <http://www.roymorgan.com/news/papers/1990/19900701/>

"We live in a world of mass-movements, in which public-opinion polls are for so many a quick and easy way of finding out what other people think, and therefore, for the sake of conformity, how they should think. Public opinion polls disturb me greatly; not because I question their accuracy or their integrity, but because of their inherent limitations. The appeal is from Philip Sober to Philip Drunk; from individual judgment and responsibility essential to civilisation, to superficial mass judgment; to finding out 'what people want'.

I have an old-fashioned lawyer's prejudice in favour of ascertaining the facts before pronouncing the judgment, and therefore pay little attention to kerbstone opinions.

A political leader inevitably reads the published polls. He will learn much from them. But he is no leader if he is persuaded by them to follow a course which he would otherwise not approve. He will do better on appropriate occasions to say - 'Here is a popular error; I must do my best to correct it!'

The danger to which I have referred, of the overwhelming of individual judgment by mass opinion, is one which tends to be increased in the new age of the computer. The quick and accurate mathematical machine threatens to become a sort of 'witch-doctor'.

The human brain and the human spirit are still the creative elements without which true human progress will be arrested."

Sir Robert Menzies, Dunrossil Lecture, March 12, 1968

There is a compelling parallel here between political leaders and Company Directors and to some degree Future Summit Participants.

In 2003, Roy Morgan Research interviewed more than a thousand Company Directors to establish their views on the economy, government and social issues⁹. Special in depth interviews with high profile, successful Directors, as well as shareholders and the general public have looked at responses to the collapse of former high profile companies. The results are worrying.

Australian Company Directors reported feeling unsure about their capacity to protect shareholders against mismanagement and deceit in the corporate Boardroom. There was wide agreement that accurate, complete information is very important to good governance and it was accepted that Company Directors should crosscheck that information is correct rather rely upon the CEO or senior management reporting to the Board.

. "Key is information- need to know information is correct and complete. CEO is critical – need to rely on information from the CEO, and to be able to put questions to CEO and expect them to be answered. If CEO or Senior management is corrupt or cheating, it is very hard for Company Directors to know."

⁹ Roy Morgan Single Source – "The Director Segment" April 2002-March 2003. Article "Questions Directors should ask before ASIC does" by Michele Levine. Published in The New Investor, October 2003
<http://www.roymorgan.com/resources/pdf/papers/20031004.pdf>

In essence they reported finding it difficult to see what else they could do to make large companies more accountable to their shareholders. And many saw themselves as relatively powerless to prevent the collapse of large companies that have not focused sufficiently on corporate performance.

While many of these high profile leaders of industry and commerce were unable to see what questions that they could ask their managers, and where they could get accurate, timely and correct data that would assist them to ask better questions as Board members, some recognised the need for **Non-executive Directors to come out of the closed "loop of close friends" and the organisational information into the "open loop" of better information and the wider values of society at large.**

The Board was seen to have to create the critical channels by which relevant information of all kinds can reach it. *“Direct communication with staff and representatives”* was called for as was *“stronger and more focussed communication with all levels of the company and the community”*, *“a non-insular approach”* as one Director put it *“Non executive Directors need to be a company’s “eyes and ears” not just a voice”*.

And finally despite clear uncertainty about how they will go about it, it is recognised that Directors must do something about the problems in their organisations. *“There is a moral obligation.”* As one Director said *“The Board can do anything. They can speak to anyone in the Company, read anything, make any enquiries they need to make to be fully informed, and then act”*. And another pointed out *“Directors must be capable and have confidence and courage”*.

Isn't this what we need from all leaders – politicians, business leaders and the thought leaders we seek to be.

The ASX and now Standards Australia have articulated their protocols for good corporate governance. But the real debate is more fundamental, and rooted in society's needs, wants, and expectations. It's about values – society's values, Directors' values, Board values, Corporate values, and how these complex sets of priorities come together.

In a very real sense this is the same challenge we face today AND GLOBALLY.

I feel very fortunate to be able to "plug out" of the world of media, politics, corporate chain of command and information flows and respond to the mind and mood of Australian people. I would like to share with you what we've learned about how Australians are responding to some of the big issues today - the environment, terrorism, corruption, globalisation, etc

Roy Morgan Research asked average Australians and Future Summit Participants the same question: *“Firstly, what do you think is the most important problem facing the world today?”* and *“What do you think is the most important problem facing Australia today?”*

It's already been mentioned that average Australians were more likely than Future Summit Participants to consider Terrorism, Wars, Security and Safety as the major problem facing the world.

There were also different perspectives in relation to major problems facing Australia, average Australians being most concerned about Human and Government issues (predominantly around Government and the political system, but including immigration, intolerance, refugees, racism and multiculturalism) (25% in total); followed by economic issues (20%), terrorism, security, etc (12%).

“What do you think is the most important problem facing the world today?”

“What do you think is the most important problem facing Australia today?”

Most Important Problem	THE WORLD		AUSTRALIA	
	Future Summit Participant	Australians	Future Summit Participant	Australians
	s	%	s	%
Terrorism/Wars/Security, Safety	14	32	3	12
Economic Issues	27	19	24	20
Environmental Issues	26	14	18	8
Government, Human Issues	17	13	22	25
Social Issues	4	11	20	11
Health Issues	1	4	-	9
Energy Crisis/Depletion of Fossil/ Fuels/Petrol Prices	5	1	4	1
Other	6	3	9	8
Can't Say	-	3	-	6
Total	100	100	100	100

Detailed responses are presented in Appendix 1 and Appendix 2.

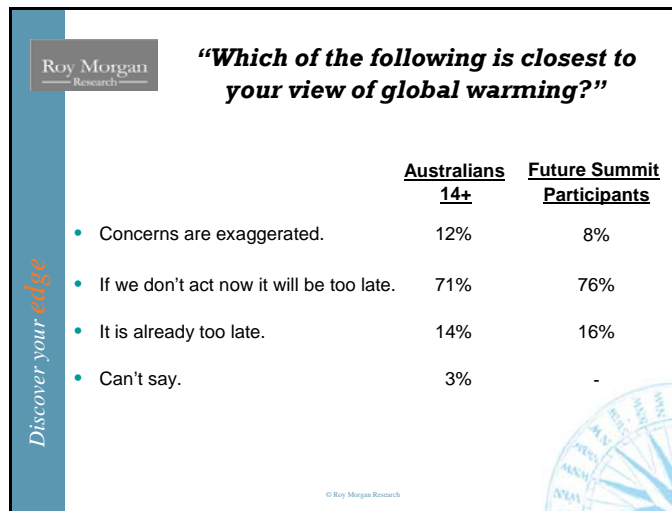
Australians and Future Summit Participants were asked: *“What do you believe are the important **Environmental issues** facing the world today? What do you believe are the important **Environmental issues** facing Australia today?”*

Australians view the important Environmental issues facing the world and Australia today differently. Fifty-six percent of Australians believe Global Warming issues are one of the most important Environmental issues **facing the world** today. Among Future Summit Participants, this view is reported even more widely (68%).

However 43% of Australians believe Water conservation, Water management or Drought is the most important Environmental issue **facing Australia** – a view held by even more (55%) of Future Summit Participants.

Important Environmental Issues	THE WORLD		AUSTRALIA	
	Future Summit Participants	Australians	Future Summit Participants	Australians
	%	%	%	%
Global Warming Issues	71	56	37	26
Pollution	8	27	6	22
Waste Management	3	7	3	7
Water Management Issues	16	9	53	35
Water Management including Drought	16	12	55	43
Natural Disasters	-	7	5	13
Depletion of Resources	21	18	18	12
Overpopulation/ Urbanisation	5	4	3	3
Other	30	9	10	10
Can't Say	1	8	7	9
Total	100	100	100	100

We hold relatively similar views on the global warming imperative. 71% of Australians and 76% of Future Summit Participants believe *“If we don’t act now it will be too late”*.

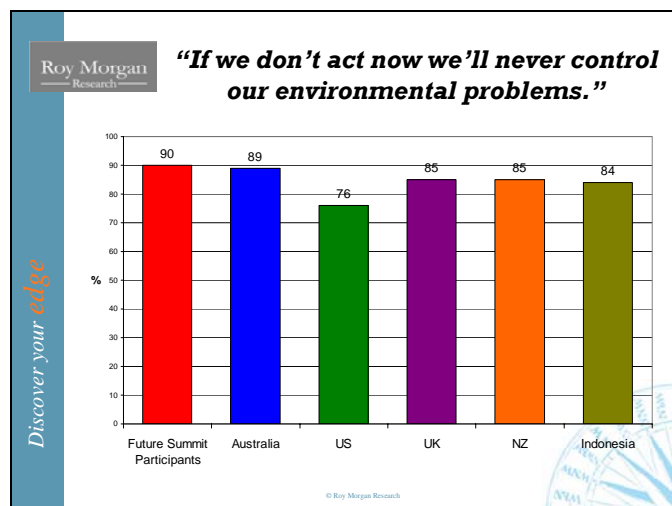


We also hold relatively similar views on uranium mining. 55% of Australians and 59% of Future Summit Participants believe Australia should export uranium for peaceful purposes.

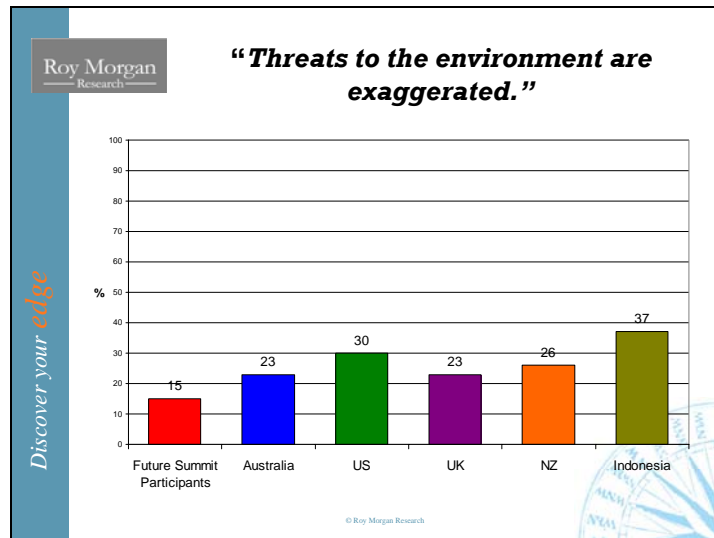
However, Future Summit Participants are less clear about Australia exporting uranium to China. While 58% of Australians agree, (39% disagree and 3% can’t say), only 45% of Future Summit Participants agree, 34% disagreeing and 21% unable to say.



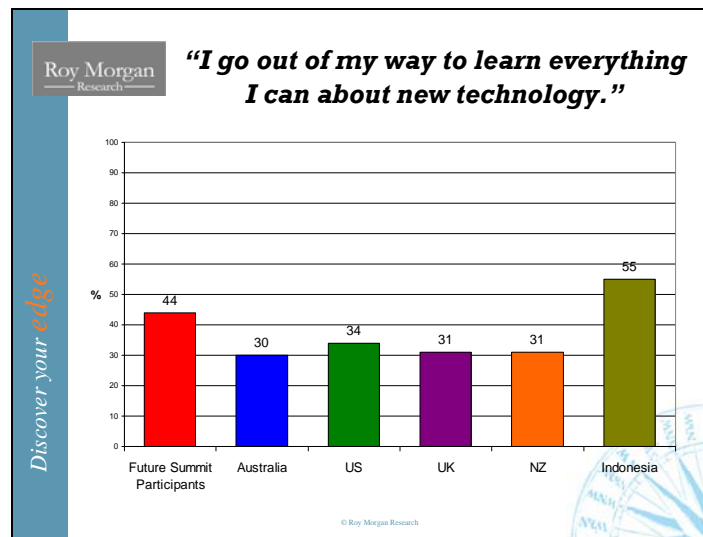
There is general agreement globally that if we don’t act now we’ll never control our environmental problems.



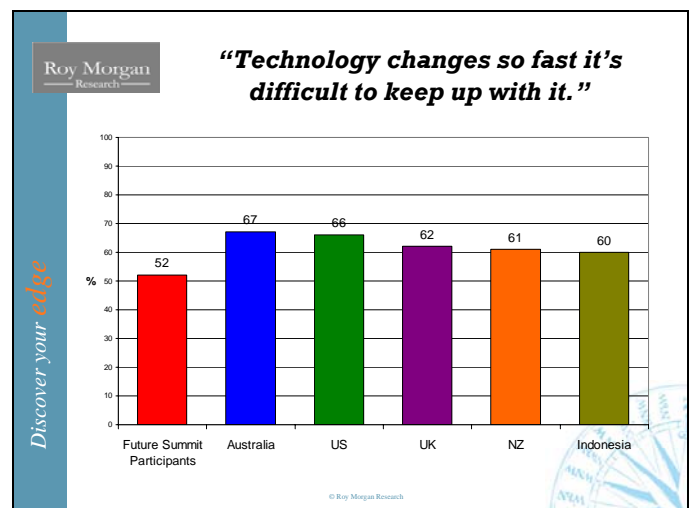
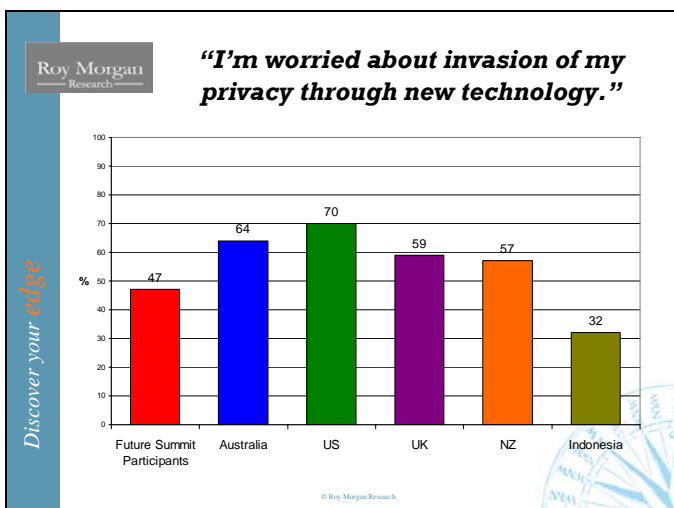
Very few believe *“Threats to the environment are exaggerated”* – the % responses range from as low as 23% in Australia and the UK, to as high as 38% in Indonesia. Among Future Summit Participants only 15% subscribe to this view.



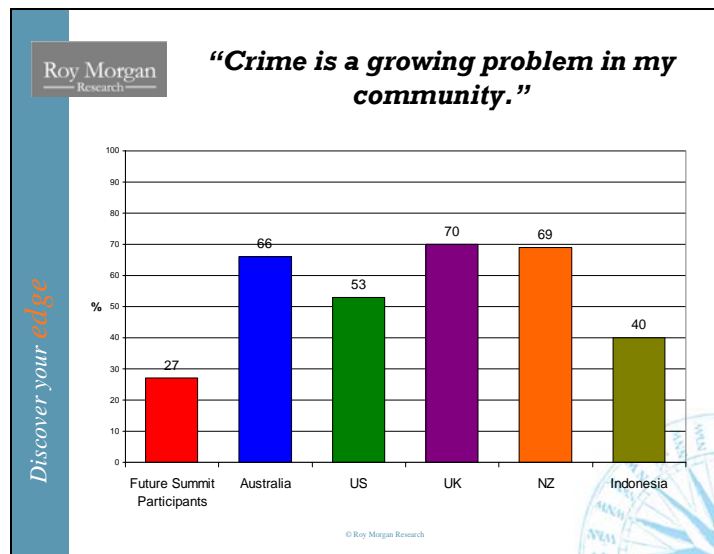
When it comes to technology, Future Summit Participants are more likely than all except Indonesians to agree *“I go out of my way to learn everything I can about technology”*.



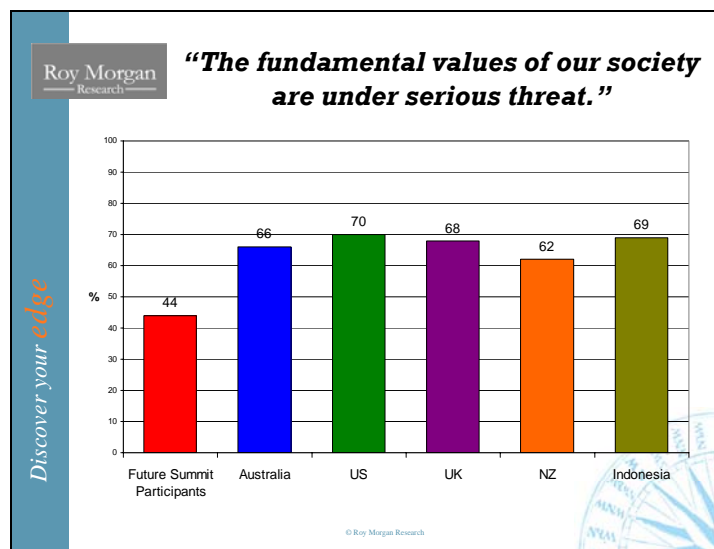
Future Summit Participants are less likely than all except Indonesians to be worried about technology and invasion of privacy; or to find technology changes too fast for them.



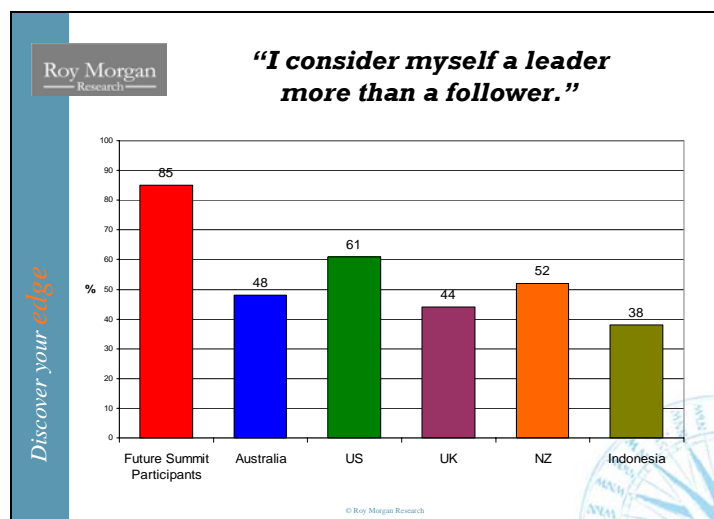
Future Summit Participants are less likely than all to be concerned that crime is a growing problem in their community.



The view that “the fundamental values of our society are under serious threat” is a view held by a majority in all countries surveyed, but by only 44% of Future Summit Participants.



Perhaps this is because Future Summit Participants see themselves as being in control. 85% consider themselves to be leaders rather than followers. This is higher even than the US national average of 61% (13% higher than Australia at 48%).



Australia must be a significant player in the International arena.

Some would argue we already are a significant player in the International arena. US President, George W Bush, now mentions Australia in his press conferences! We are mentioned as a prime target for Islamic terrorists. But are we a significant player? Do we have a voice? Are we being listened to?

If Roy Morgan Research does not conduct this international research to provide Australia in a global context there's no-one who will.

In conclusion, we here are embarking on two days of thought leadership, and consideration of possible futures. The data shows very real differences between Australians and people from other countries, and real differences between Australians and Future Summit Participants.

We must deliberate on behalf of all the Australian people. We must recognise the differences; we must recognise the dangers of ignoring or misunderstanding the views of people; or underestimating the power of the choices people make.

Finally we have an opportunity and responsibility to present the views of Australia within the International context, lest others elsewhere in the world take it upon themselves to speak and decide for us.

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Appendix 1 “What do you think is the most important problem facing Australia today?”

<u>Most Important Problem Facing Australia</u>	THE WORLD		AUSTRALIA	
	<u>Future</u>	<u>Australians</u>	<u>Future</u>	<u>Australians</u>
	<u>Summit</u>		<u>Summit</u>	
	<u>Participants</u>		<u>Participants</u>	
	%	%	%	%
Terrorism	4	20	-	6
Wars and conflicts	2	11	-	2
Security, Safety	2	1	-	1
Relations with other countries	6	-	3	3
Total Terrorism/Wars/Security/Safety	14	32	3	12
Economic problems	2	1	9	2
Industrial relations reforms	-	-	-	6
Poverty, The gap between rich and poor	21	16	6	4
Unemployment	-	*	1	5
Over-population	2	1	-	*
Insufficient population growth/Ageing population	-	-	3	-
Globalisation/Fairer world trade	2	1	2	2
Infrastructure	-	-	3	1
Total Economic Issues	27	19	24	20
Water conservation	1	1	5	3
Global warming	18	5	9	1
Famine	-	2	-	-
Other environmental issues	7	6	4	4
Total Environmental Issues	26	14	18	8
Petrol prices	-	*	-	1
Energy crisis	3	1	2	*
Depletion of fossil fuels	2	*	2	*
Total Energy Crisis/Depletion of Fossil Fuels/Petrol Prices	5	1	4	1
Bird flu	-	1	-	-
Other health issues	1	3	-	9
Total Health Issues	1	4	-	9
Corruption	2	*	-	*
Greed, Materialism	1	3	1	*
Drugs and drug abuse	-	2	-	2
Educational issues	-	1	2	2
Crime	-	1	-	2
Youth issues	-	1	-	2
Anger/Violence/Aggression	-	1	-	*
Social apathy/Family breakdowns/ Selfishness/Moral decline	1	2	12	3
Indigenous disadvantage	-	-	4	-
Cultural development	-	-	1	-
Total Social Issues	4	11	20	11
Government, Politics, Political system	9	2	15	7
Religion, Religious fundamentalism	5	5	-	2
Human rights	-	*	-	1
Refugees, Refugee and asylum problems	-	-	-	2
Immigration, Immigration policy	-	1	2	5
Intolerance	2	3	1	3
Racism/Racial tensions	-	2	1	2
Multiculturalism	1	*	2	2
John Howard/Howard government	-	-	1	1
Total Government, Human Issues	17	13	22	25
Other	6	3	9	8
Can't say	-	3	-	6
Total	100	100	100	100

Appendix 2 “What do you think is the most important environmental issues facing Australia today?”

<u>Important Environmental Issues Facing Australia</u>	THE WORLD		AUSTRALIA	
	<u>Future Summit</u>	<u>Australians</u>	<u>Future Summit</u>	<u>Australians</u>
	<u>Participants</u>	<u>Participants</u>	<u>Participants</u>	<u>Participants</u>
	%	%	%	%
Global warming	44	35	20	13
Greenhouse effect, Greenhouse gases	11	15	2	7
Climate change	15	5	12	3
Ozone layer	1	5	3	2
Melting of polar ice caps	2	3	-	*
Extinction, Loss of species	15	2	8	2
Reduction in habitable land	1	1	1	2
Introduction of non-native species	-	-	-	1
El Nino	-	*	-	*
Total Global Warming Issues	71	56	37	26
Pollution (unspecified)	6	14	4	10
Air pollution	1	8	2	6
Water pollution	1	5	1	5
Cars, Exhaust from cars	-	3	-	3
Smog	-	*	-	*
Total Pollution	8	27	6	22
Recycling	1	3	2	4
Nuclear waste	1	2	-	2
Toxic waste	1	*	2	1
Landfill	1	1	-	1
Plastic bags	-	1	-	1
Total Waste Management	3	7	3	7
Water conservation, Water management	14	8	43	27
Erosion	1	*	2	*
Salinity	2	1	17	11
Total Water Management Issues	16	9	53	35
Total Water Management Issues (Inc. Drought)	16	12	55	43
Drought	-	4	5	12
Hurricanes, Cyclones	-	1	-	*
Famine	-	1	-	-
Bushfires	-	-	-	*
Earthquakes	-	*	-	-
Flooding	-	*	-	-
Tsunami, Tidal waves	-	-	-	-
Total Natural Disasters	-	7	5	13
Energy crisis, Depletion of fossil fuels	12	10	9	6
Depletion of natural resources	7	9	6	6
Finding renewable energy resources	4	-	6	-
Total Depletion of Resources	21	18	18	12
Over population	4	4	-	2
Urbanisation	2	*	3	1
Total Over Population / Urbanisation	5	4	3	3
Logging forests or deforestation	11	11	10	15
Mining	-	-	-	2
Bird flu	-	*	-	-
Other	30	9	10	10
Can't say	1	8	7	9
None	-	-	-	2

(Respondents could give more than one issue)

* Less than 1%

Appendix 3

Life Satisfaction
Individualism
Quality Expectations



*Devised by Michele Levine of Roy Morgan Research and Colin Benjamin of the Horizons Network.



Price Expectations
Innovation
Progressiveness

AUSTRALIA
Roy Morgan Research Pty. Ltd.
A.B.N. 91 007 092 944

USA
Roy Morgan International Ltd.
Fed. ID No. 52-2147612

UK
Roy Morgan International Ltd.
Company No. 3978314

NEW ZEALAND
Roy Morgan Research Pty. Ltd.
A.B.N. 91 007 092 944

INDONESIA
PT Roy Morgan Research
NPWP. 02.194.412.9-058.000

Australian and New Zealand Member of the Gallup International Association

	Basic Needs	A Fairer Deal	Traditional Family Life	Conventional Family Life	Look At Me	Something Better	Real Conservatism	Young Optimism	Visible Achievement	Socially Aware
S <i>social</i>	Ageing/ Illness/Care	Segmentation of lifestyles but increased awareness of gap between rich & poor	Increasing longevity and search for meaning	Educational concerns for their children	Credit access and alcohol/drug escapism increase crime rates at juvenile level	Reduced life satisfaction and increased family demands	Feelings of isolation and insecurity	Internationalised aspirations and religious orientation plus expressive action	Orientation to high degrees of turbulence "See you in Sydney for the Olympics"	Commitment to wide variety of social issues especially the environment
T <i>technology</i>	Medical Technology	Robotics	Health/leisure integration	Home technology, sophistication	Entertainment/leisure systems	CAD/CAM Systems	Technological changes are seen as too much too fast and of doubtful value	Information technology and new generation systems	Management decisions support systems	Global intelligence access and integrated orgware
E <i>economics</i>	Increasing anxiety over social security and transfer payment changes	Improved economic situation through tax, wage deals and productivity gains	Increasing conversion of home equity into cash flow and reinvestment in lifestyle and equities	Two income plus households will rise dramatically. Consumption will focus on price and quality leaders plus feeling of control	High level of commitment to on-job training and promotion opportunities, provided open to the peer group	Strong shift to incentive/reward systems and performance recognition	Increasing investment in property and franked dividend oriented companies	Career focus and willingness to defer consumption for long term benefit	Increased self-employment and entrepreneurial activity plus strong export orientation	Public sector focus on service delivering lead to greater devolution of economic activity through privatisation
P <i>politics</i>	Increasing power as ageing issues become the prime focus of the middle income family	Reduced power of traditional organisations to mobilise an automatised work force	The most rapidly growing force for conservatism and social control issues with strong pressure for government regulation and national security	Taxation levels and house disposable income will shape the direction of all major parties	The big losers in the ageing debate. Personal freedom and rights of the individual will emerge as issues	Freedom and control of big business, freedom to hire/fire will produce organisational tensions	As with TFL, these will be a strong push for greater political powers and law and order sanctions	Increasing emergence of single issue and specialist political concerns that express personal politics against party machines	Corporate power politics will be more significant than electoral concerns. Parliament will decline as a focus for national debate	Issue and media related political concerns will create short term constituencies and network issues

	Basic Needs	A Fairer Deal	Traditional Family Life	Conventional Family Life	Look At Me	Something Better	Real Conservatism	Young Optimism	Visible Achievement	Socially Aware
S <i>social</i>	Super-annuation, insurance policy failures and public health provision and community safety concerns	Social equality. Access to Education. Control over immigration and population expansion	Safety Peace Law and Order Decency Self-Respect - oriented care for elderly Lifelong Education	Greater security of Employment Affordable Health, Housing and Education, Personal Safety. More Entertainment	An end to boredom and "schooling" more personal freedom. Greater range of "new" and "exciting" experiences	Conspicuous consumption. Material focus soft on social justice, liberal isolation. Arrogance, better than others. Disharmony, racial tensions	Fear of reduction of barriers. Fear of loss of any control. Maintenance of social stratification as "natural order". Have/Have Not conflict is productive	Safeguard opportunities for self-expression or personal quest. More emphasis on spiritual values. Independence. Choice in their lives	Speed of change. Working too hard. Indifference to social issues like Aboriginality and gender. Multicareer windows. Lifestyle impact of global business. Manage social issues, not solve	True multiculturalism . Frustration with yesterday and today's solution. Greater community rather than business orientation. Greater equity and anti-poverty concerns
T <i>technology</i>	Person to person contact technologies, health monitoring and maintenance technologies and security systems	Fear of technology taking over jobs and controlling our lives. Access to technology. Better sports coverage. Technology doing menial work/drudgery	User supportive and friendly, not designed to trick people. Home delivered. Minimise fuss. Low charge.	Better home appliances and cars. Use of technology in leisure. Faster cheaper transport.	Better sound systems. Virtual reality. Faster cars Free to go. where want to go Online access to games and infomatics	Opportunity to make money, get ahead consumer goods lifestyle and entertainment. Improved productivity. Winners and losers / Capital and Labour	Technology for its own sake has no value. Technology requires evaluation. Only use is to increase comfort and income. Agent of change shouldn't provide the agenda	Mastery of technology essential to control their involvement with society at large and opportunities for earning a living	Business opportunities they represent. Global business. Privacy, security, time. Scepticism about speed of intro. Australia may be left out.	Smart medical solutions. Ownership of implementation of technological solutions. Technology = innovative solutions and expanded creativity supports
E <i>economics</i>	"Silver hair power" focussing on income security and short term community jobs that maintain self-respect	Maintaining a small population to achieve "Australian Dream" "Eat the rich" Provide for the aged	Family needs focus. System doesn't reward bludgers. User pays for everything above the basics	Stable economic conditions. Low prices and taxation. Greater choice in consumables	Everyone has a job and a car. Money for leisure. No menial jobs	Free markets. Survival of the fittest. Reduced redistribution of income. More entrepreneurial support	Asset protection is essential for economic stability. Protection of personal wealth. Fair days work for fair days pay	Self-focussed. Rewards for merit and hard work. The successful will prosper, the others go under. Competence is everything	Travel infrastructure. More entrepreneurial. International finance/or small. Our people can't keep up. Not jobs for all Triad trade blocs	Tendency to cash out. Remove the "hour glass" structure. Learning and earning for everyone. Sustainable environment and controls
P <i>politics</i>	"Grey Power" voting block of babyboomers restructures the political scene by electing networks of minority interests	Provision of medical services and education. Maintain separate entity from rest of world. Give everyone a say through computer polling	Politicians who tell the truth. Parties that represent conservative values. "Fear" driven vision seeking greater security	Stability, minimal change. Reduction of influence of politicians. Indifference to claims for diversity of representatives	Ability to influence local politics and greater freedom from the "Geriatrics" running the country	"Leave me alone to get on with it" "Not in my backyard" Class differences. Winners and Losers OK. Support for powerful leaders	Valueless Government should be entrusted to the few that we can influence. Increased impact of networking	Social order and regulation to preserve gains and protect territory. Strong, clean, non-interventionist politics. Somewhat naive.	Business is key disinterested politically. Government is too slow for real world. Increasing Asian influence in all political decisions	Too much power in the hands of large business. Greater participation. Pluralism. Global politics. Global issues and local service systems management