

State of the Nation

The Manpower Vision Series

March 14, 2008

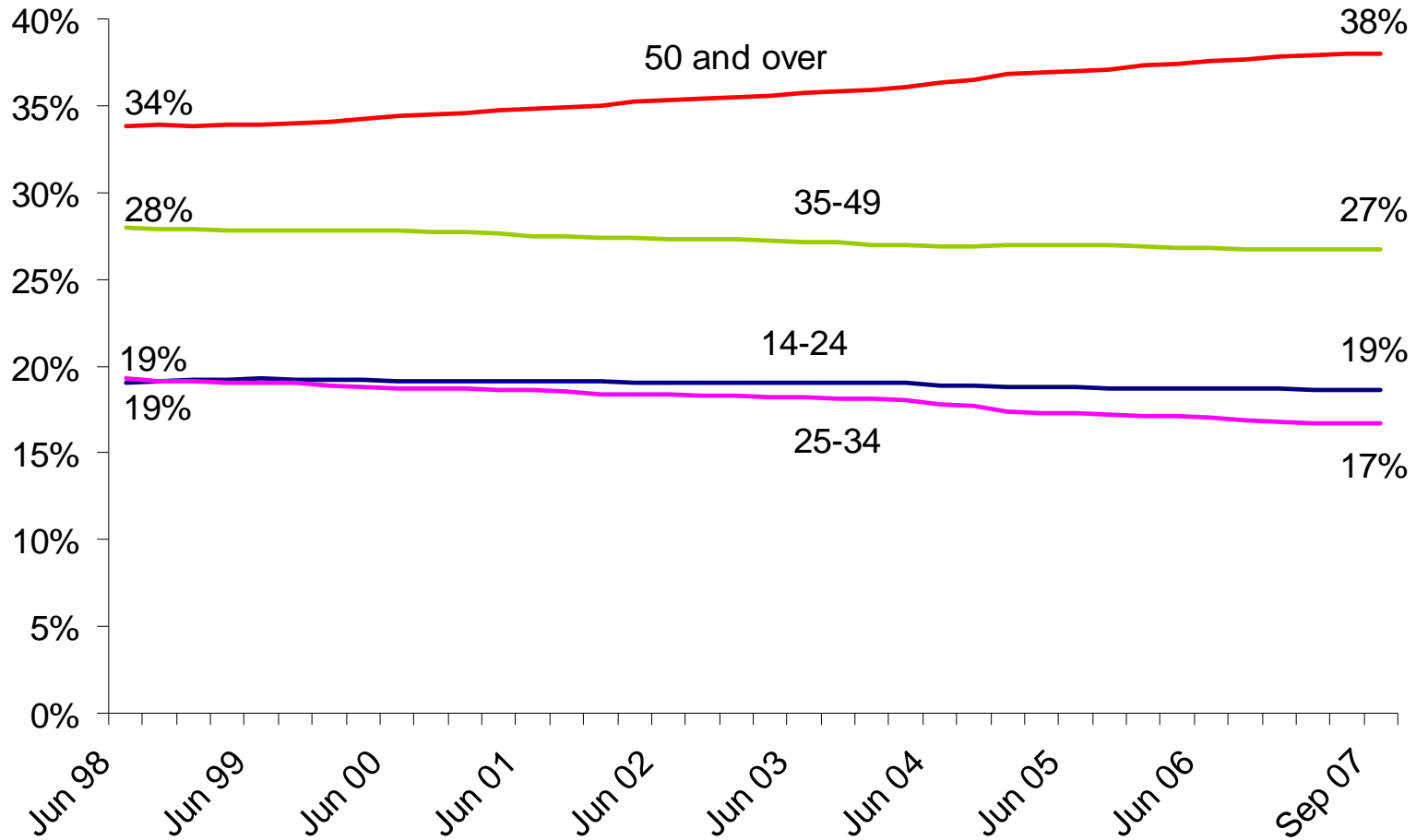
*Michele Levine, CEO
Roy Morgan Research
Melbourne, Australia*

Discover your edge



Society

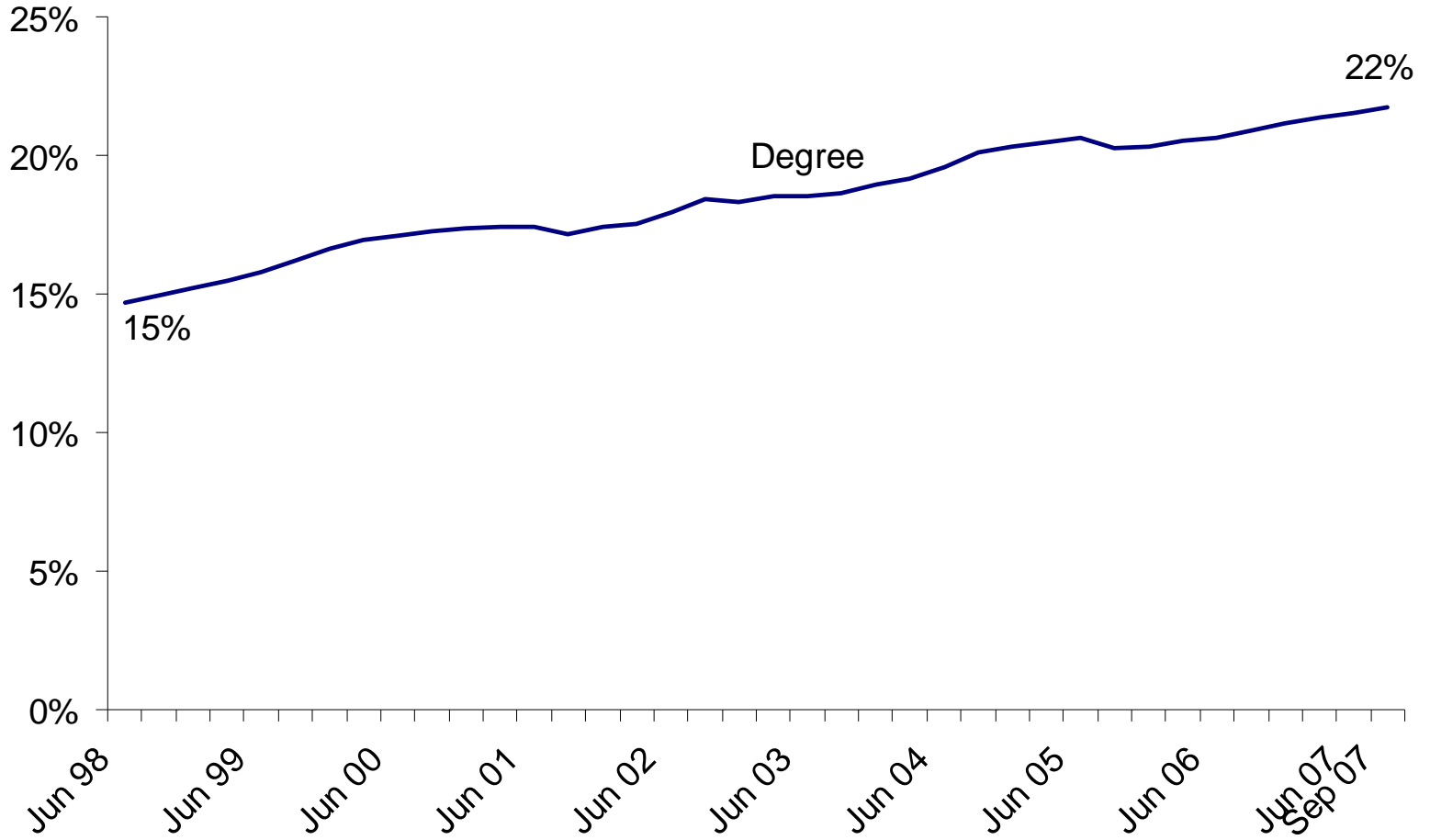
Ageing Population



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

Society

Rising Education Level

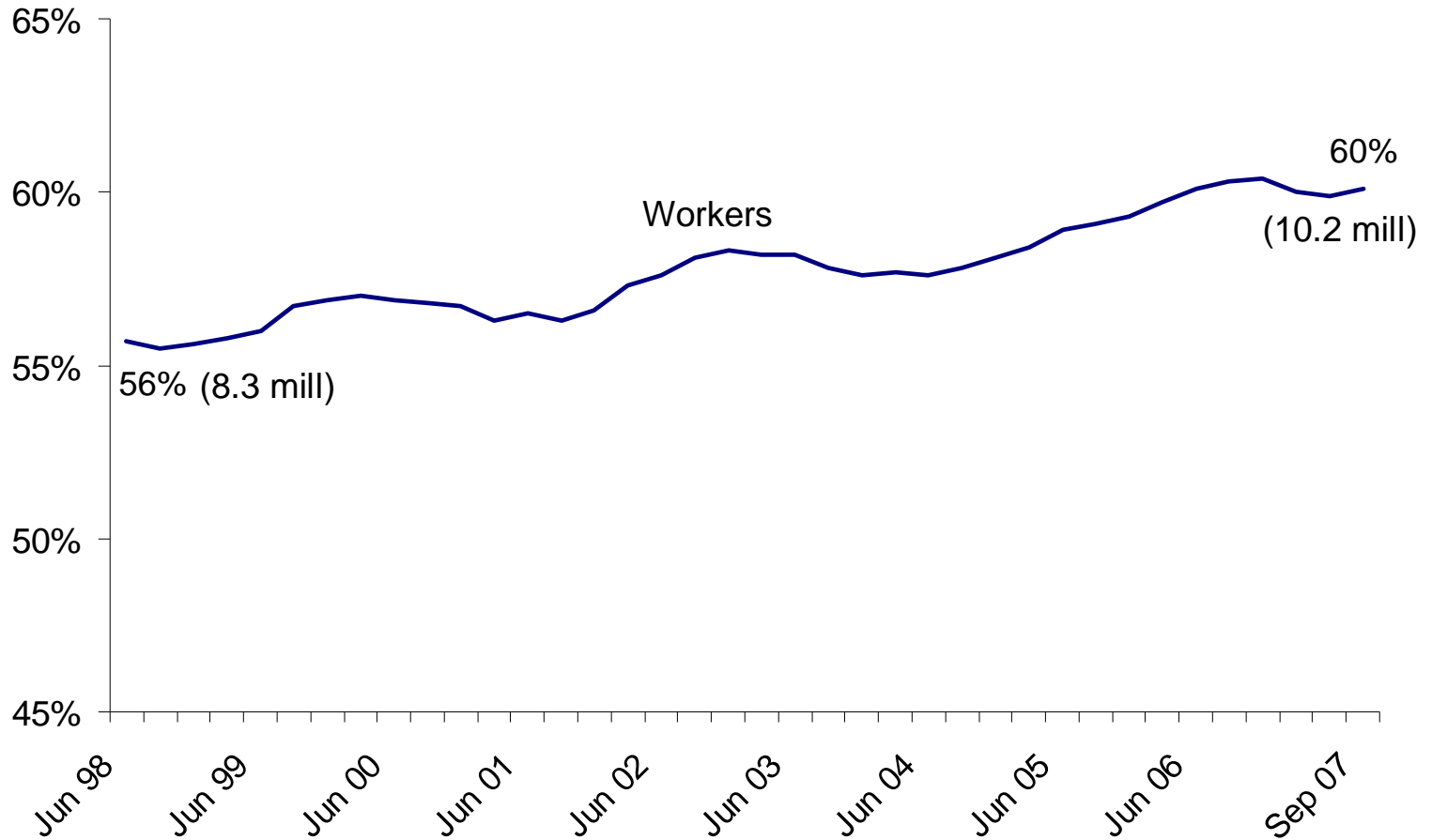


Base Aust Population aged 14+; Source: Roy Morgan Research (10M)

Discover your edge

Society

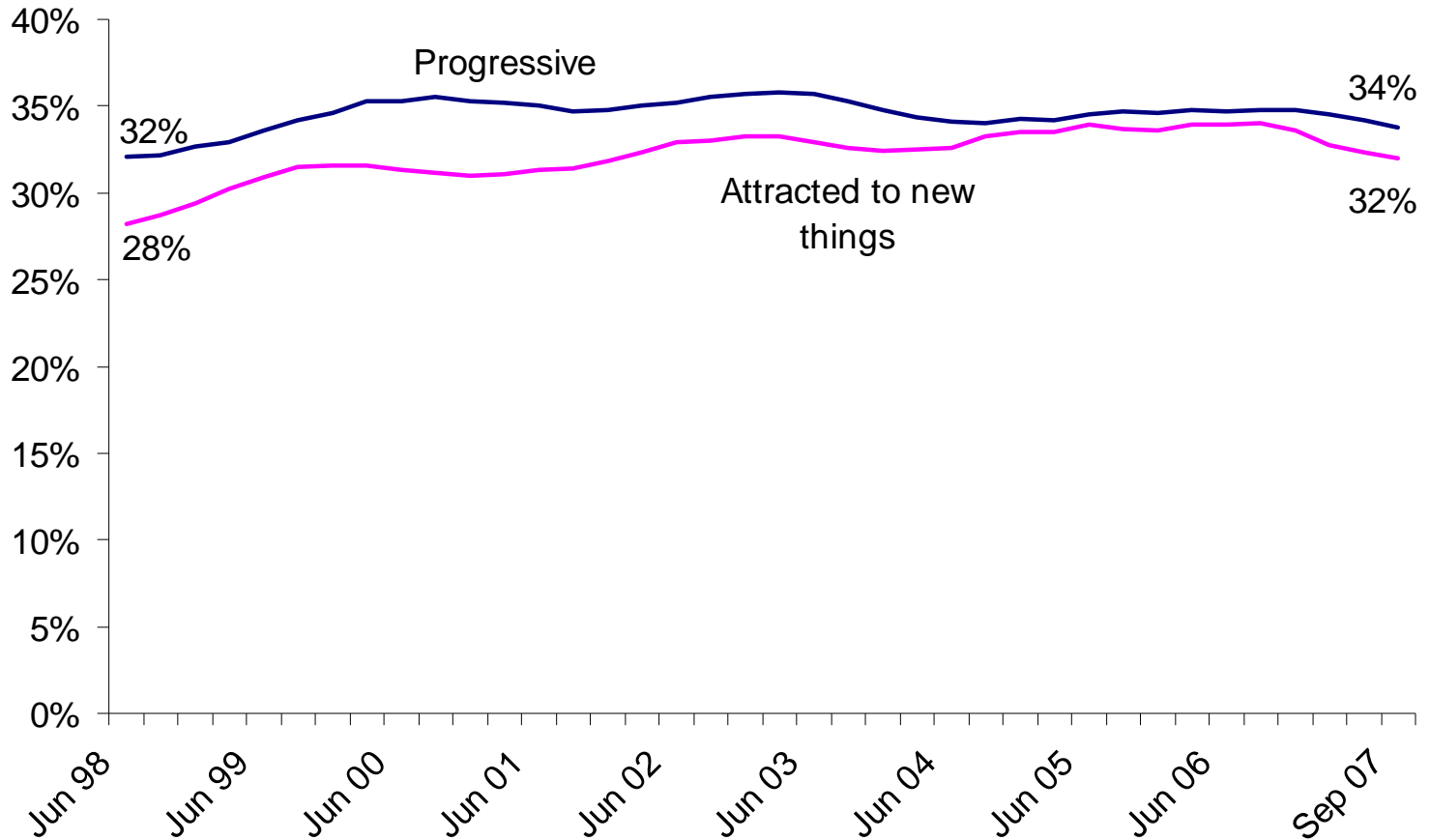
Increasing % of Australians Working



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

Society

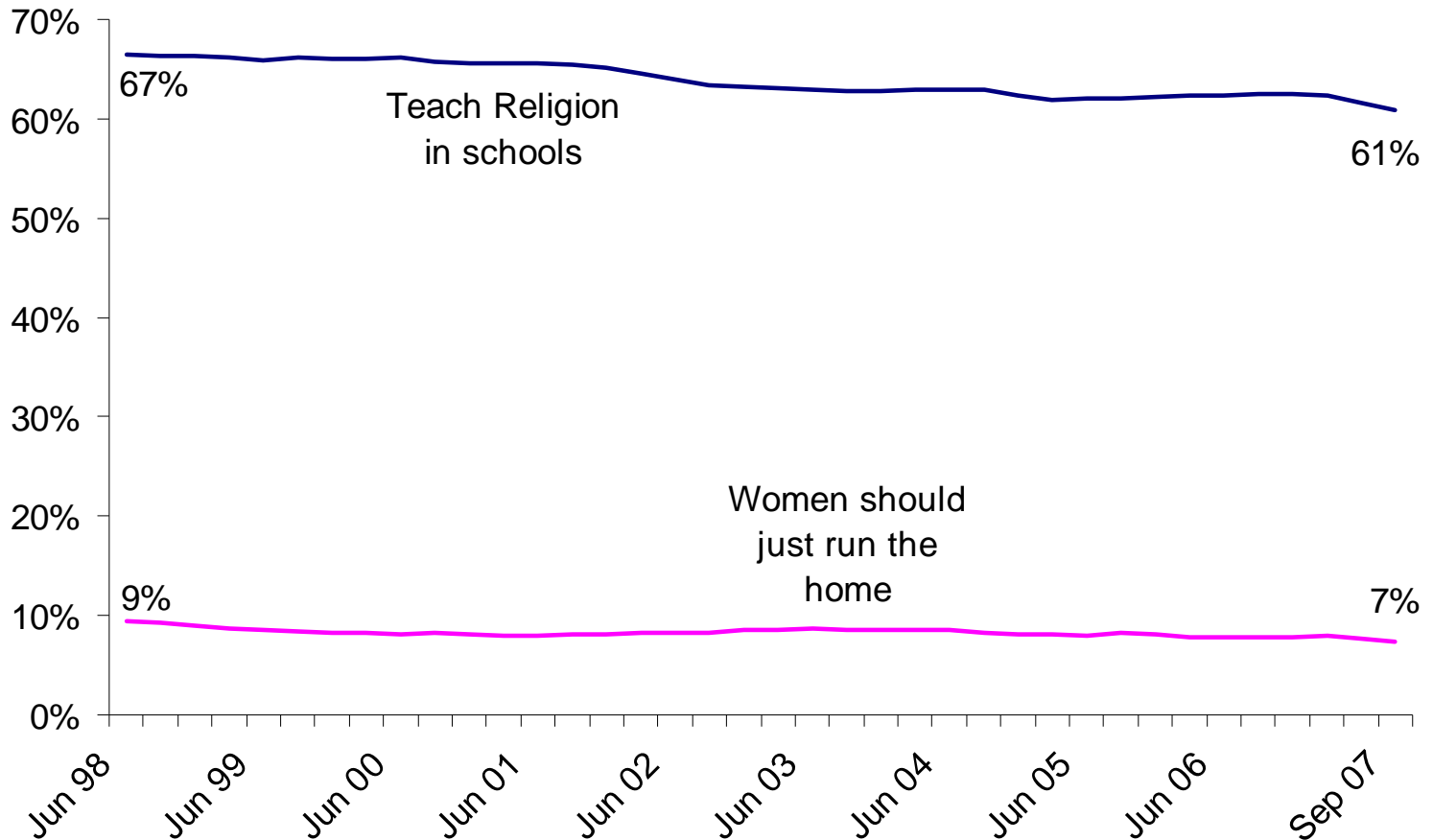
Australians Becoming More Progressive



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

Society

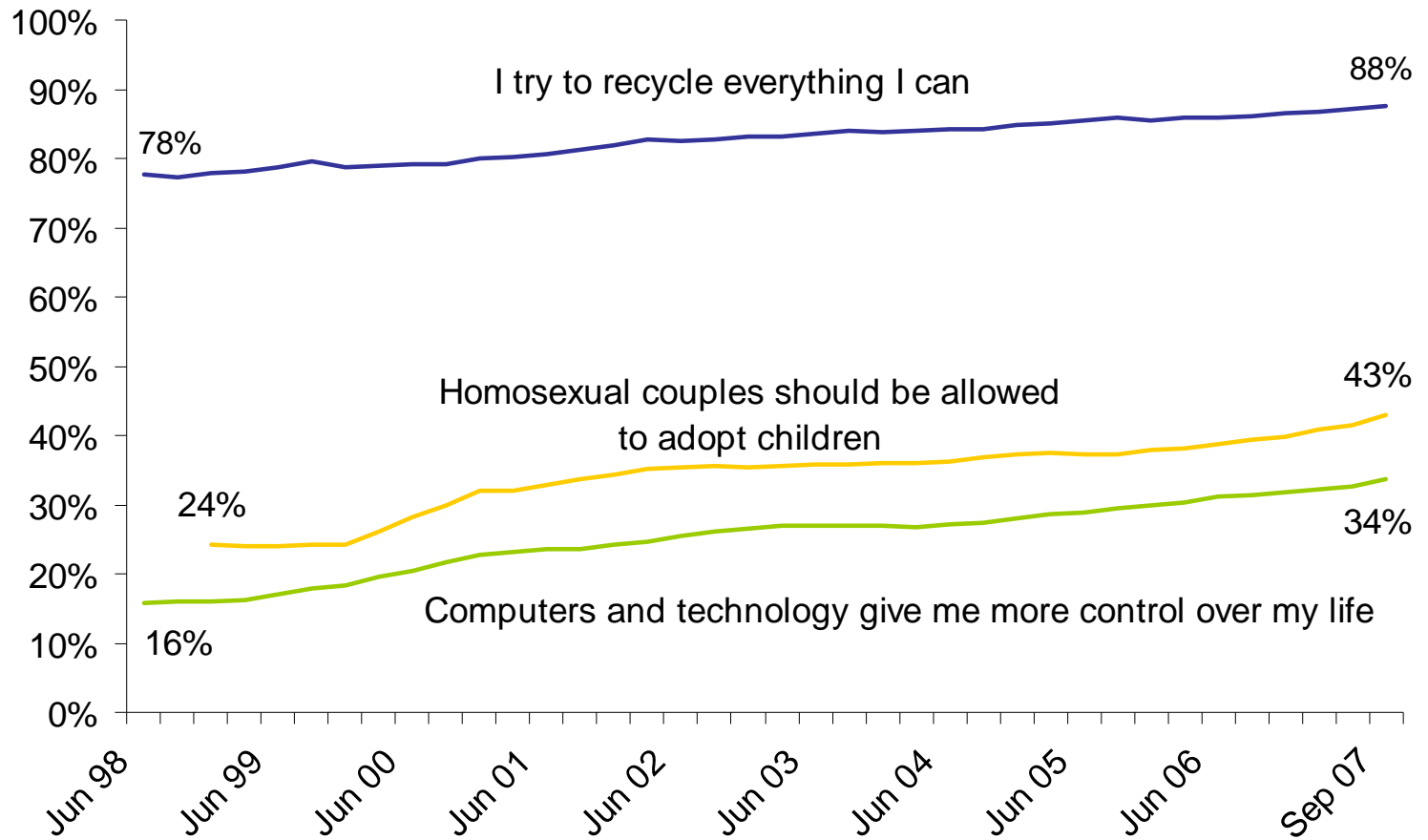
Australians Becoming Less Conservative



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

Society

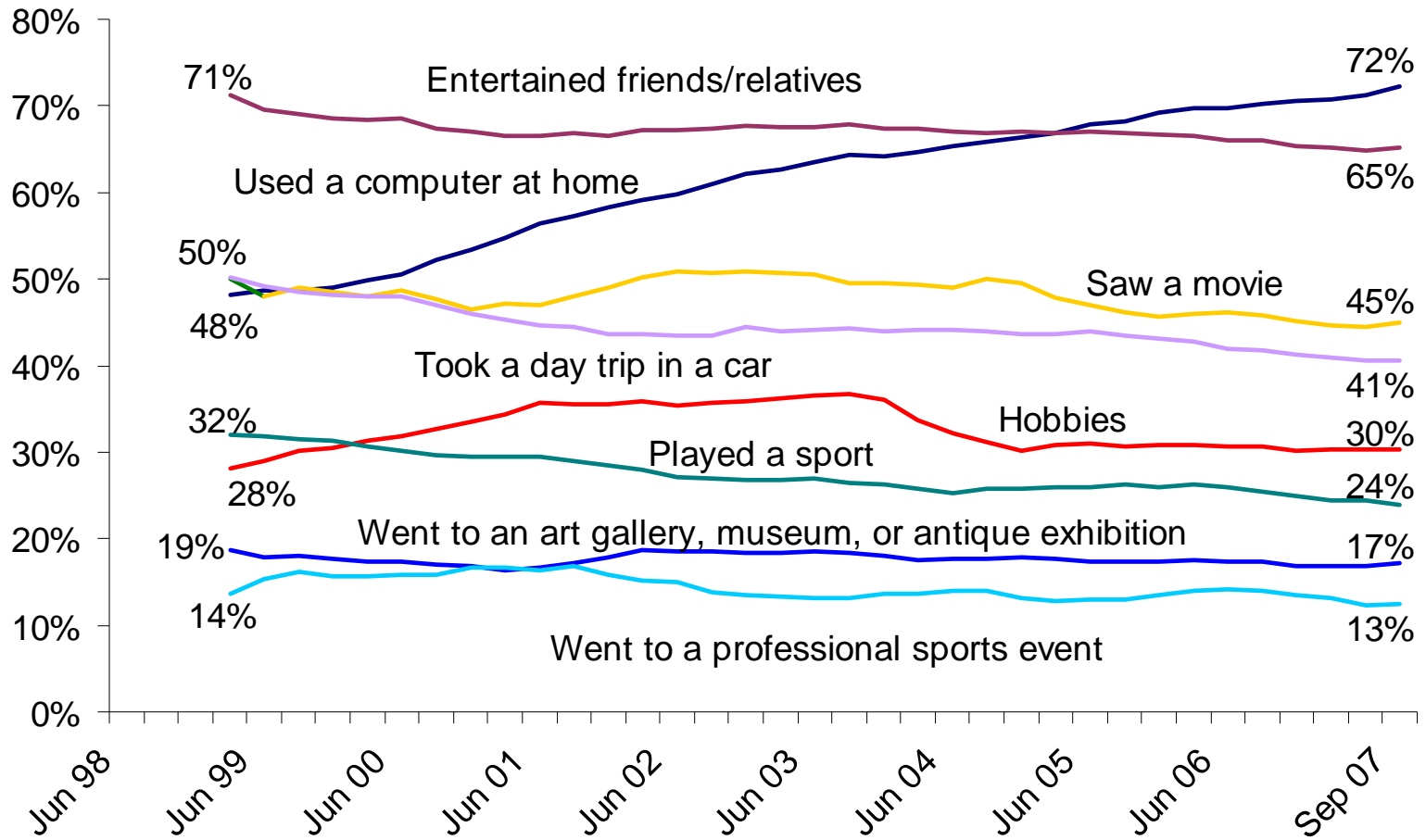
Australians Becoming More Progressive



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

Society

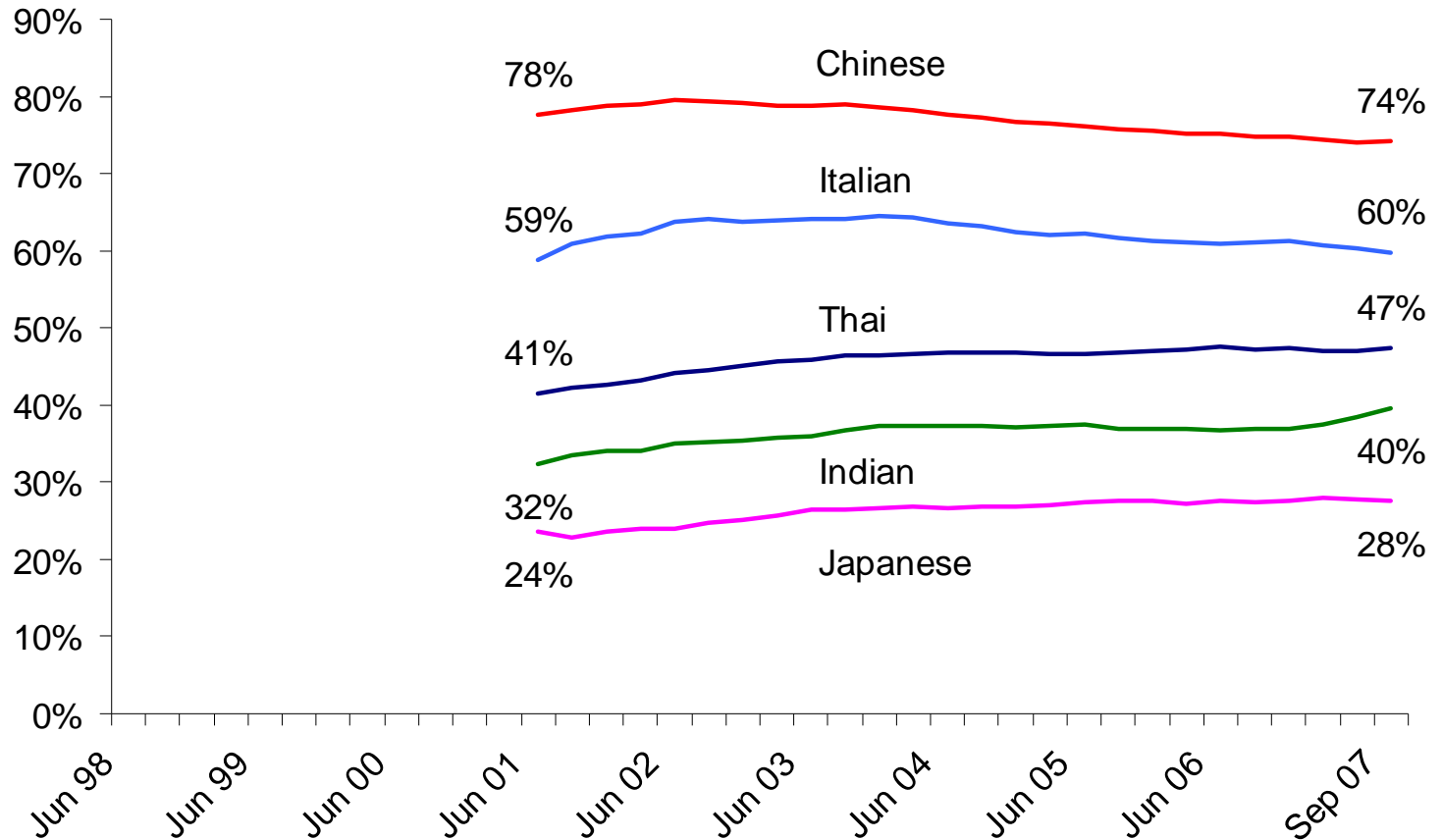
Changing Leisure Activities



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

Society

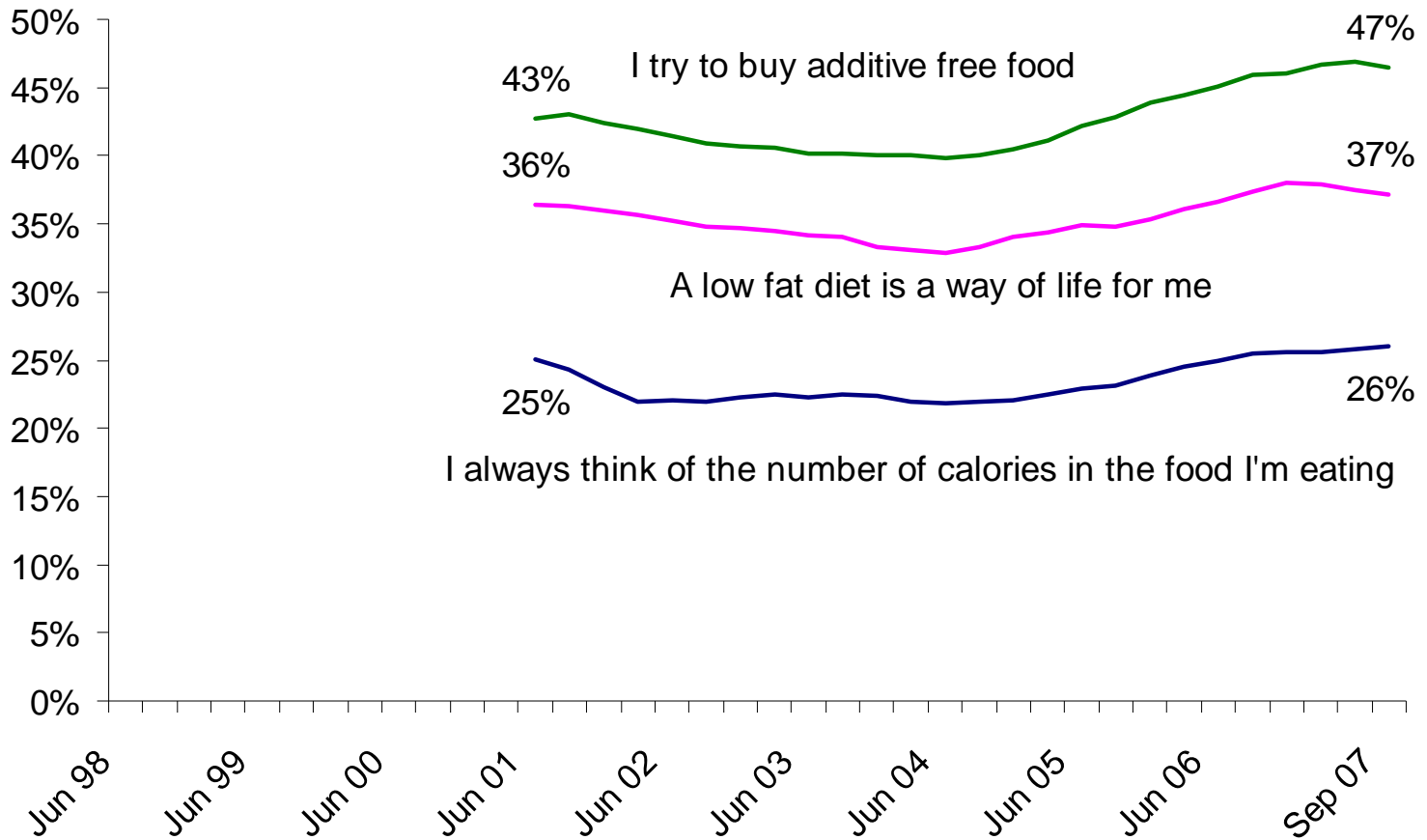
Food and Health



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

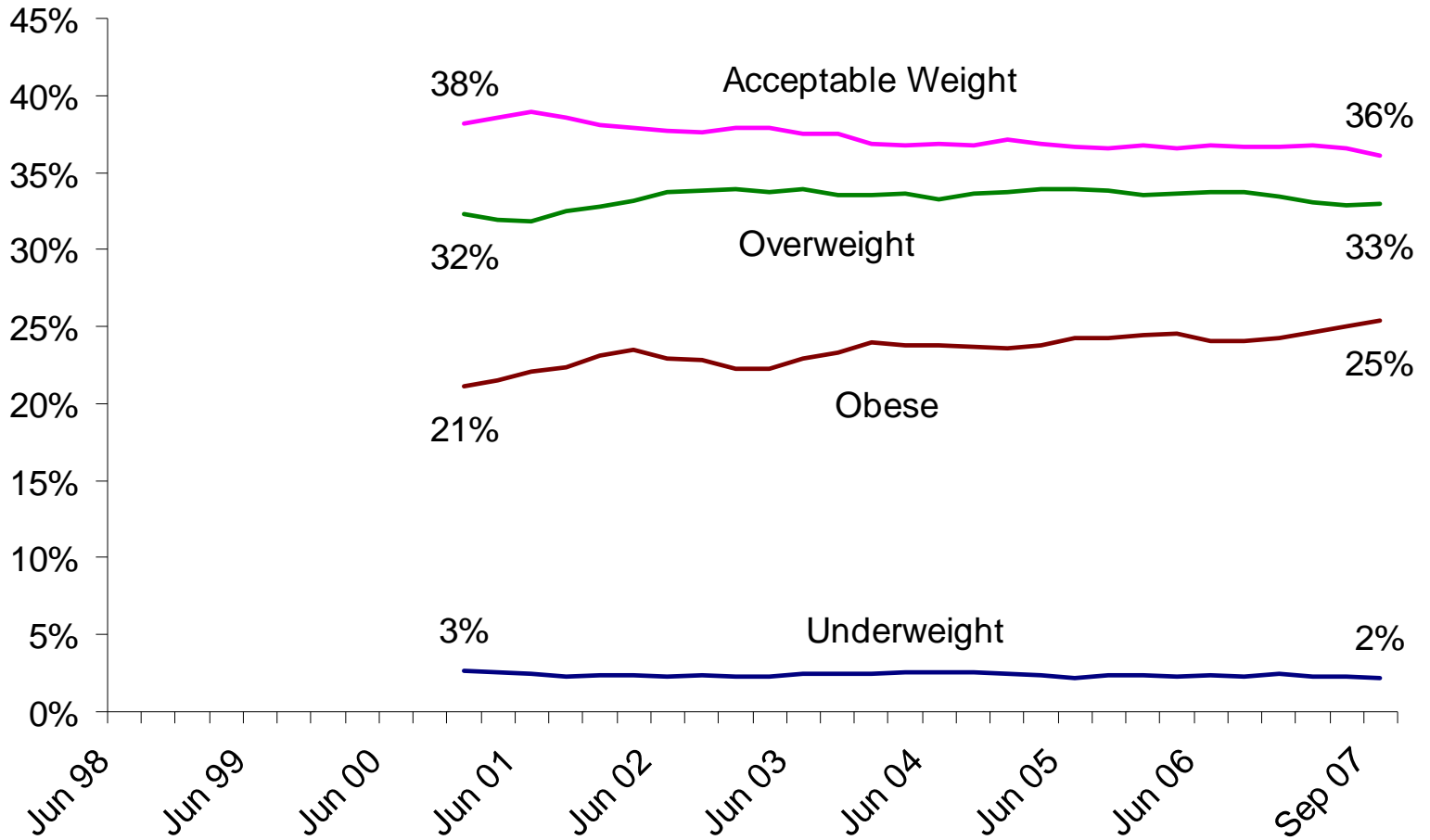
Society

Food and Health



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

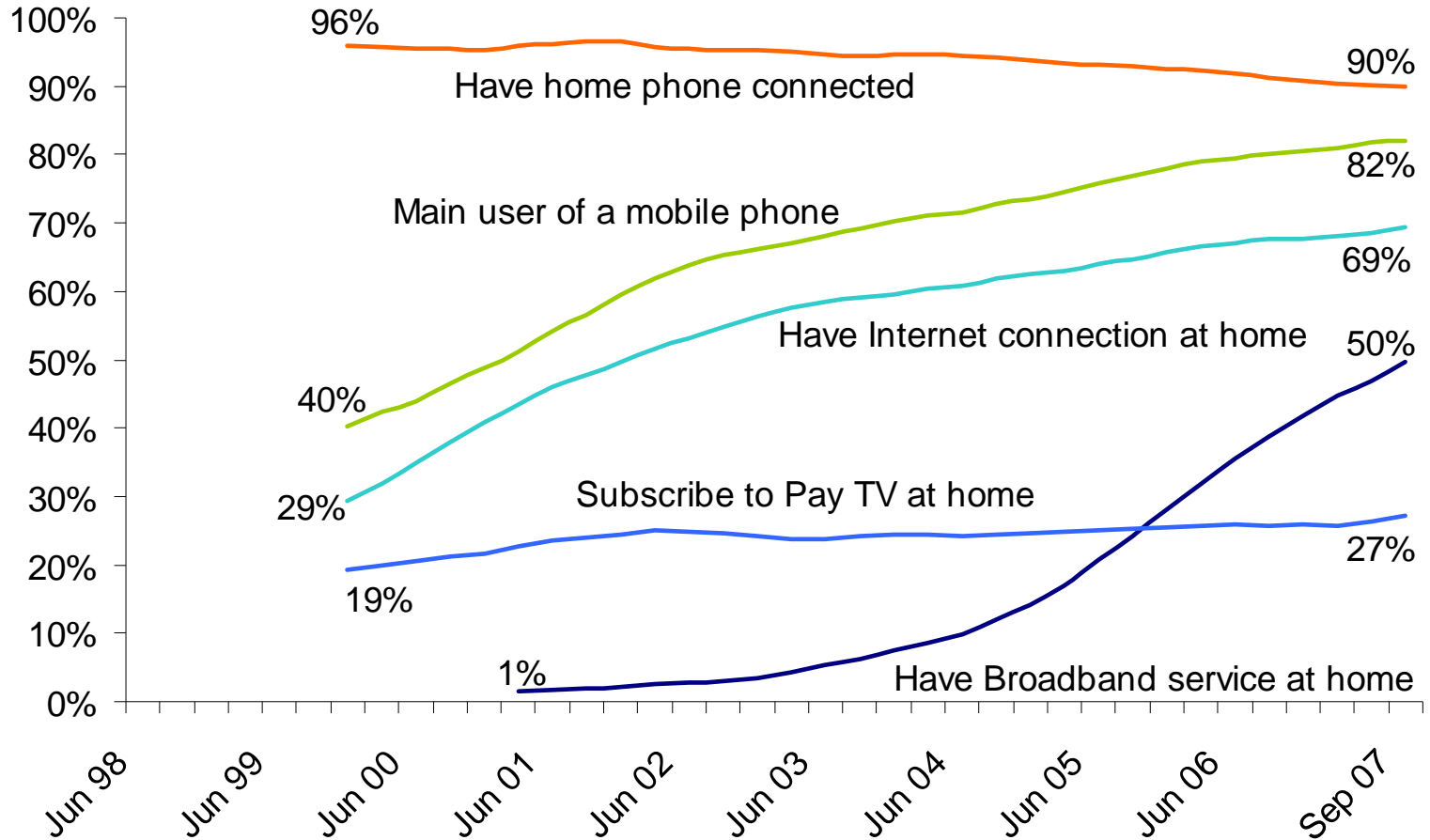
Society BMI



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

Technology

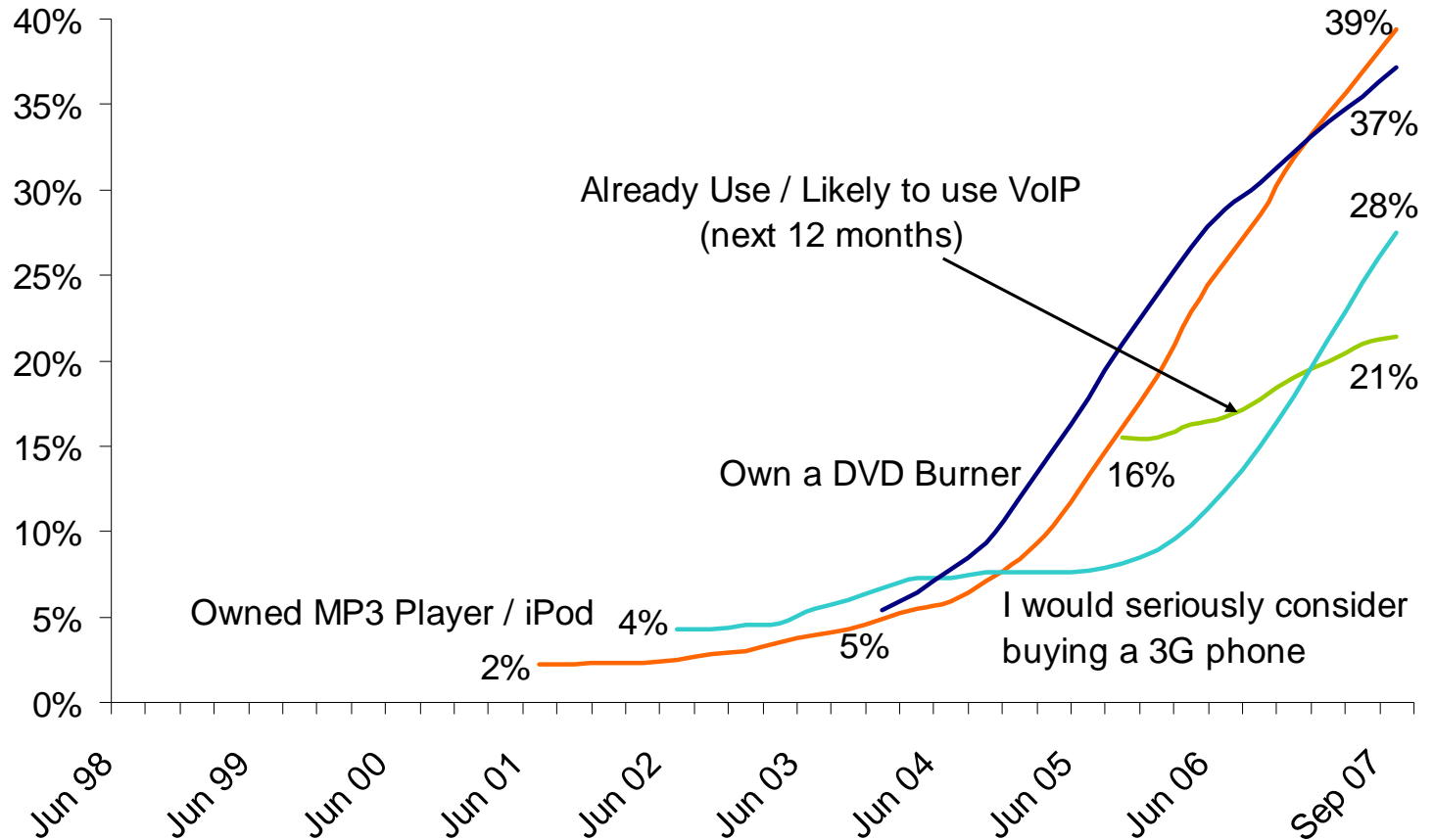
Mobile and Internet, particularly Broadband Increase



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

Technology

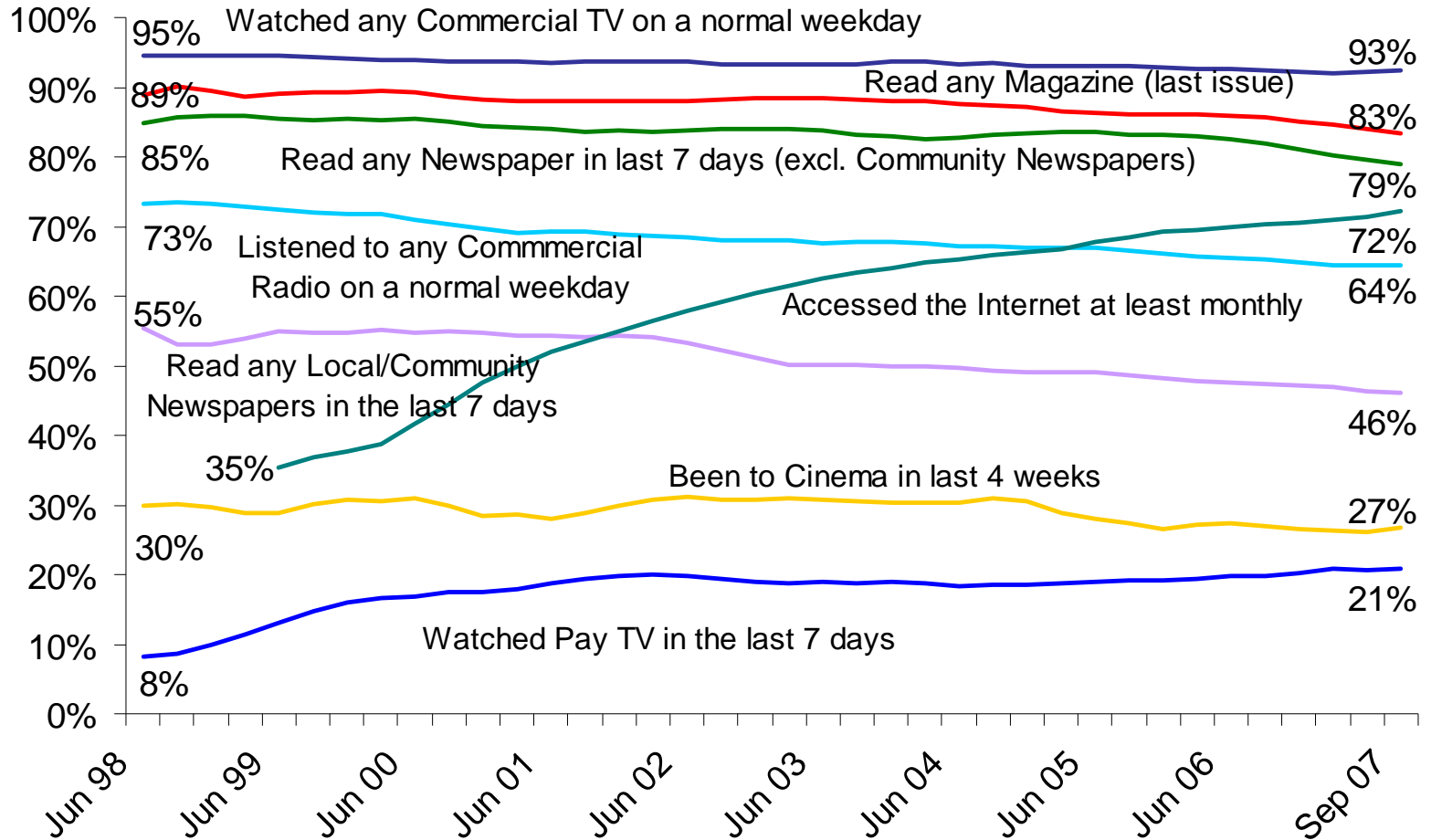
MP3 Players, DVD Burners, 3G Phone Consideration and VOIP Use/ Intention Increasing



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

Technology

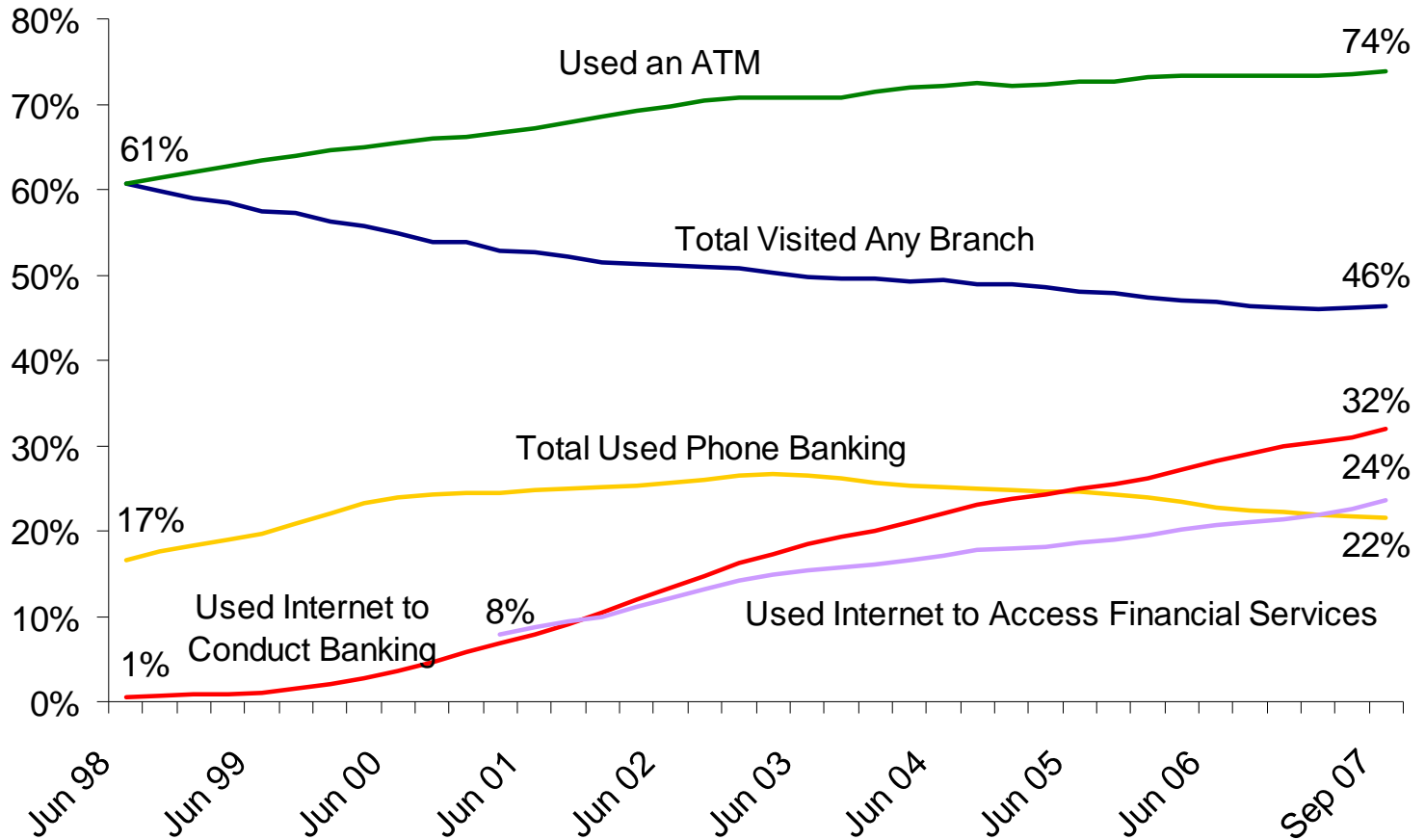
Media Consumption Over Time



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

Technology

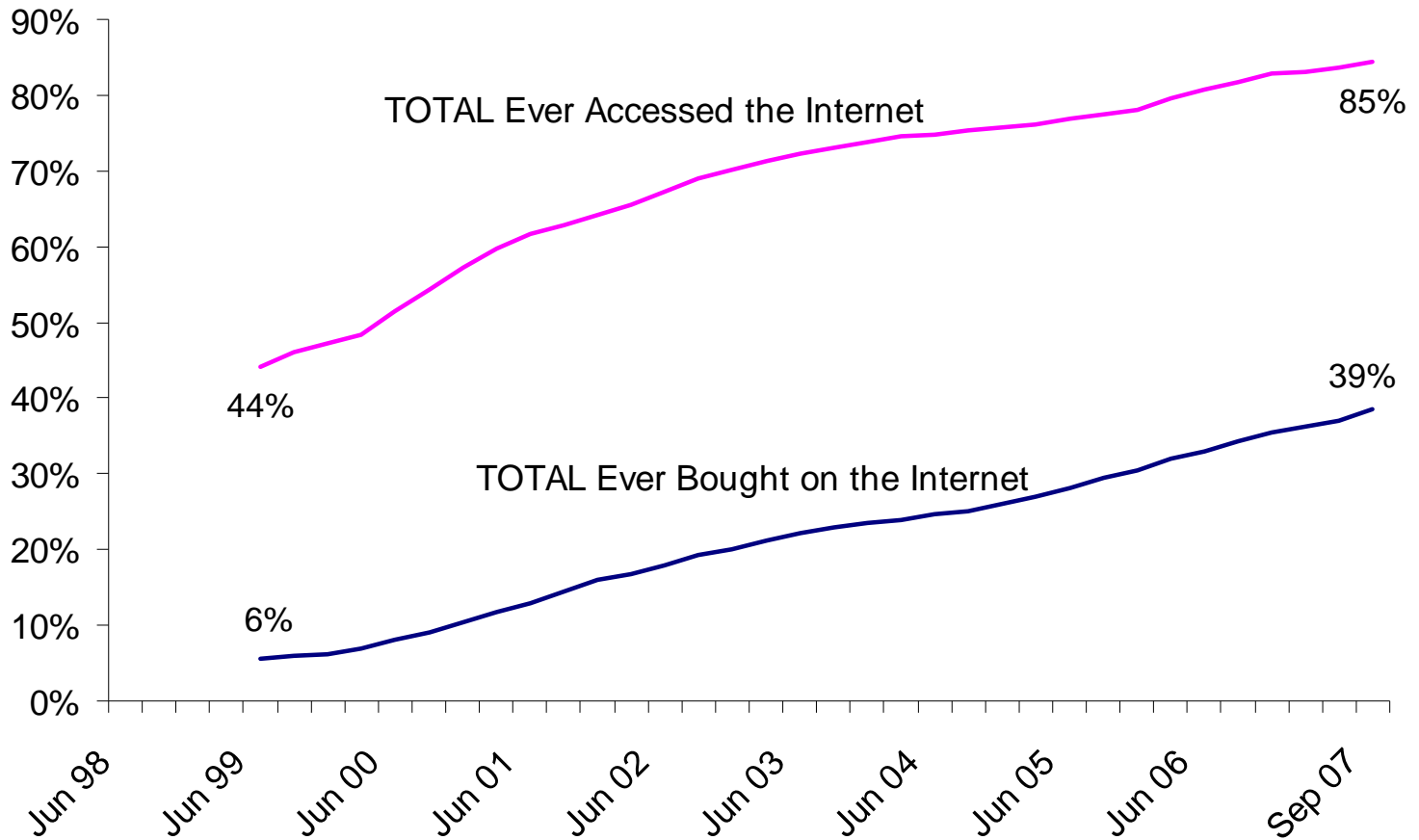
Technology and Banking



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

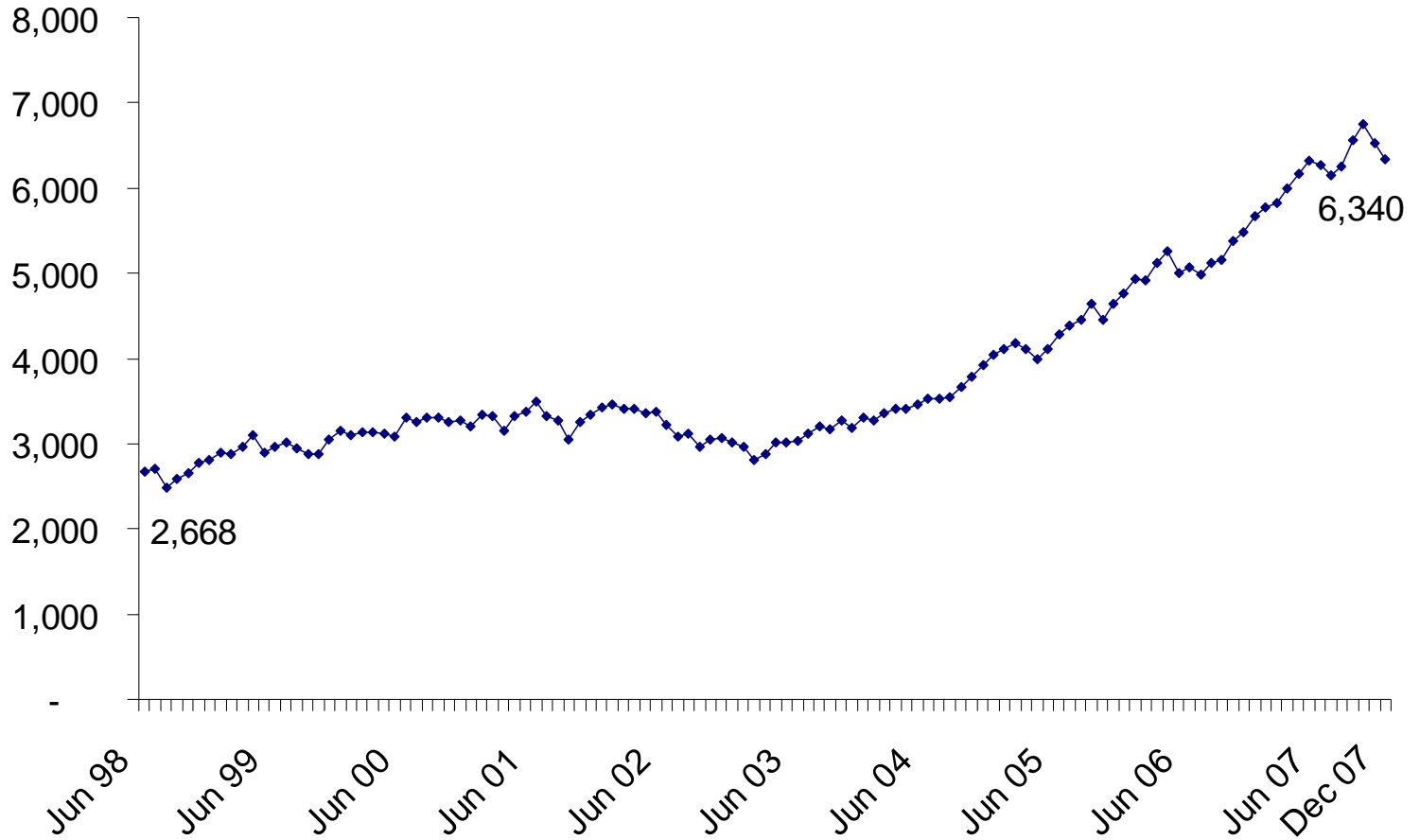
Technology

Shopping on the Internet



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

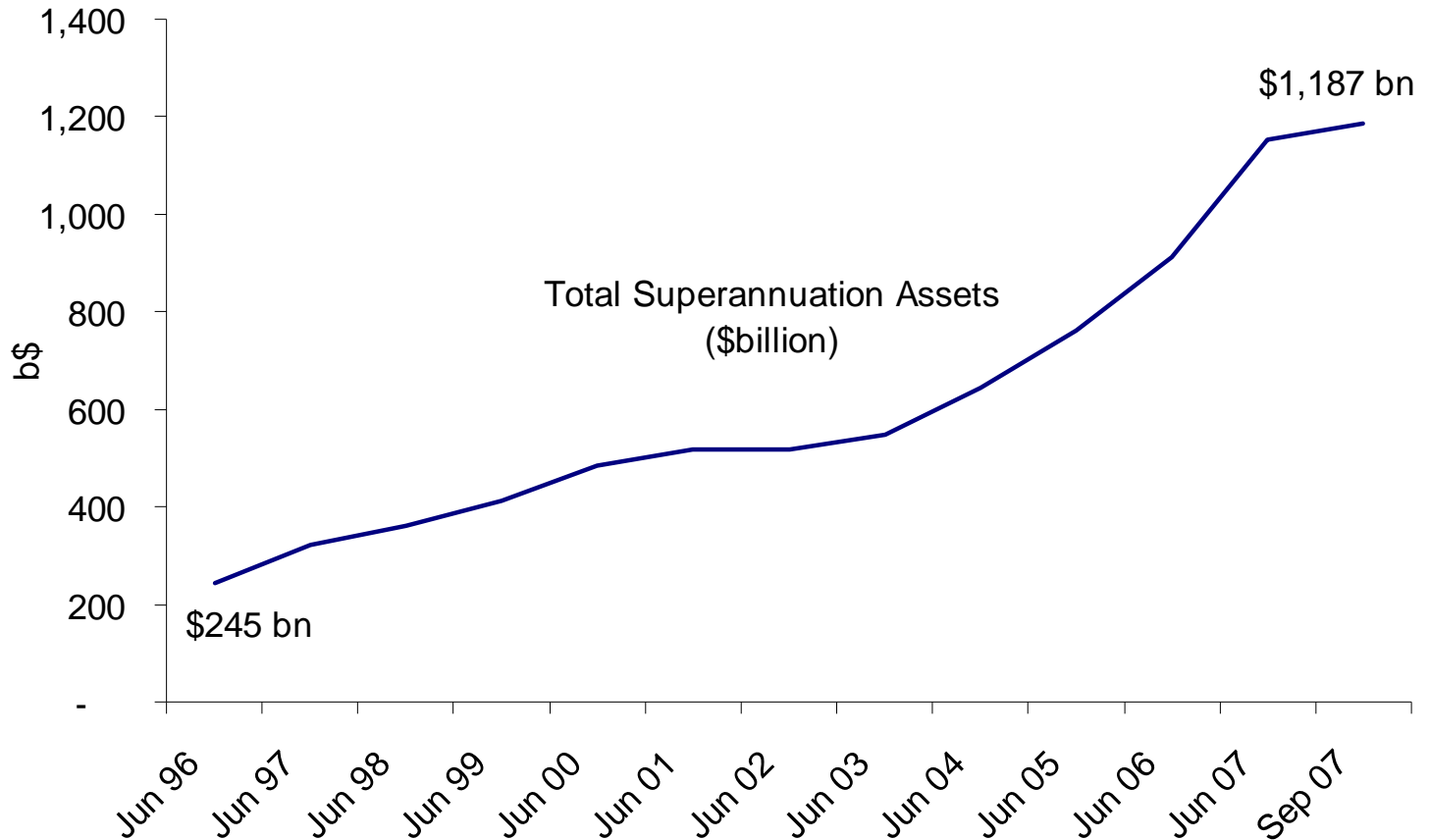
Economy Share Market



Source: Reserve Bank of Australia

Economy

Total Superannuation Assets



Source: APRA

Economy

Rising Wealth & Debt

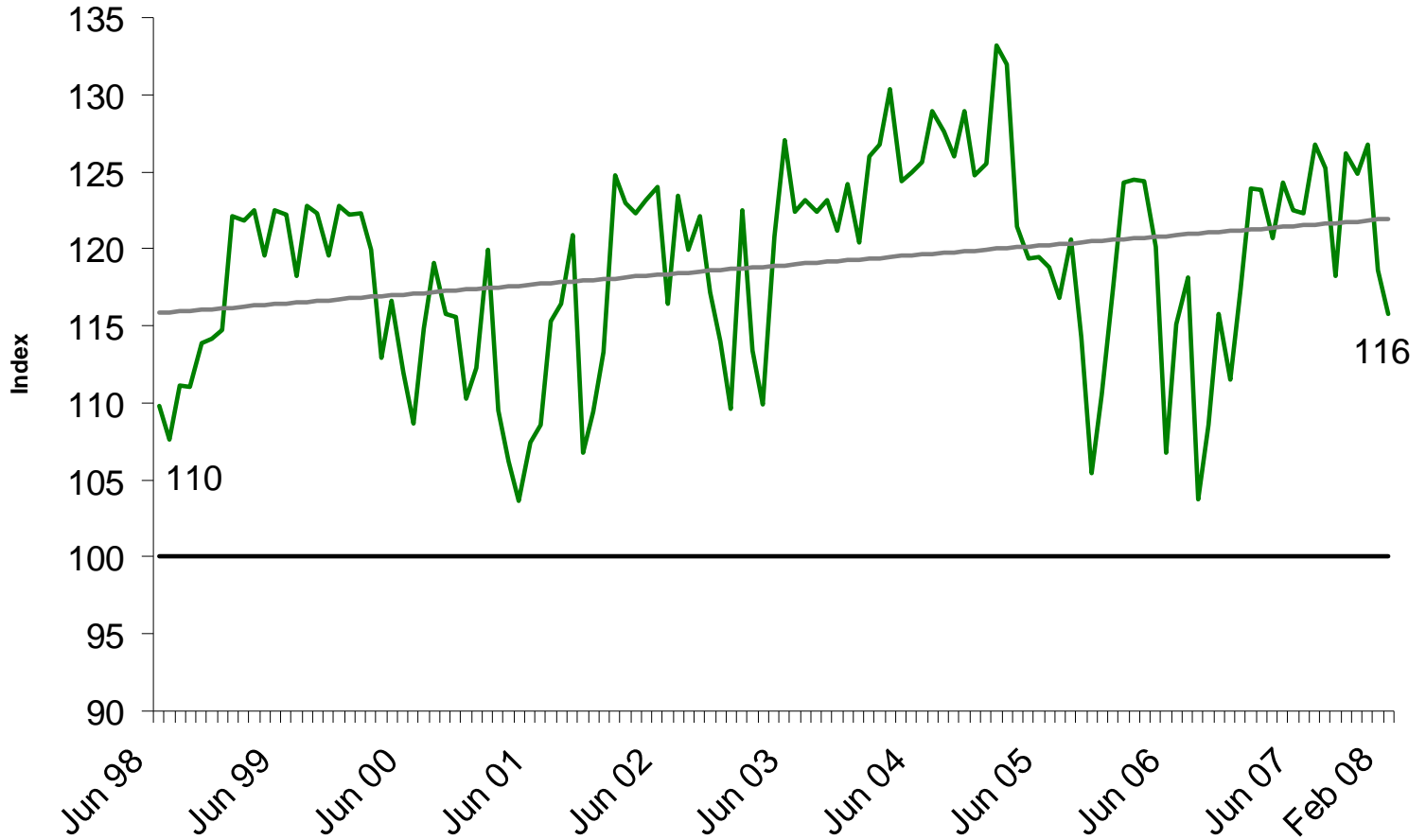
- *Housing Loan Outstandings** *1997 – 2007, increased 327%*
- *Credit Card Outstandings** *1997 – 2007, increased 412%*
- *Superannuation Savings** *1997 – 2007, increased 269%*

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

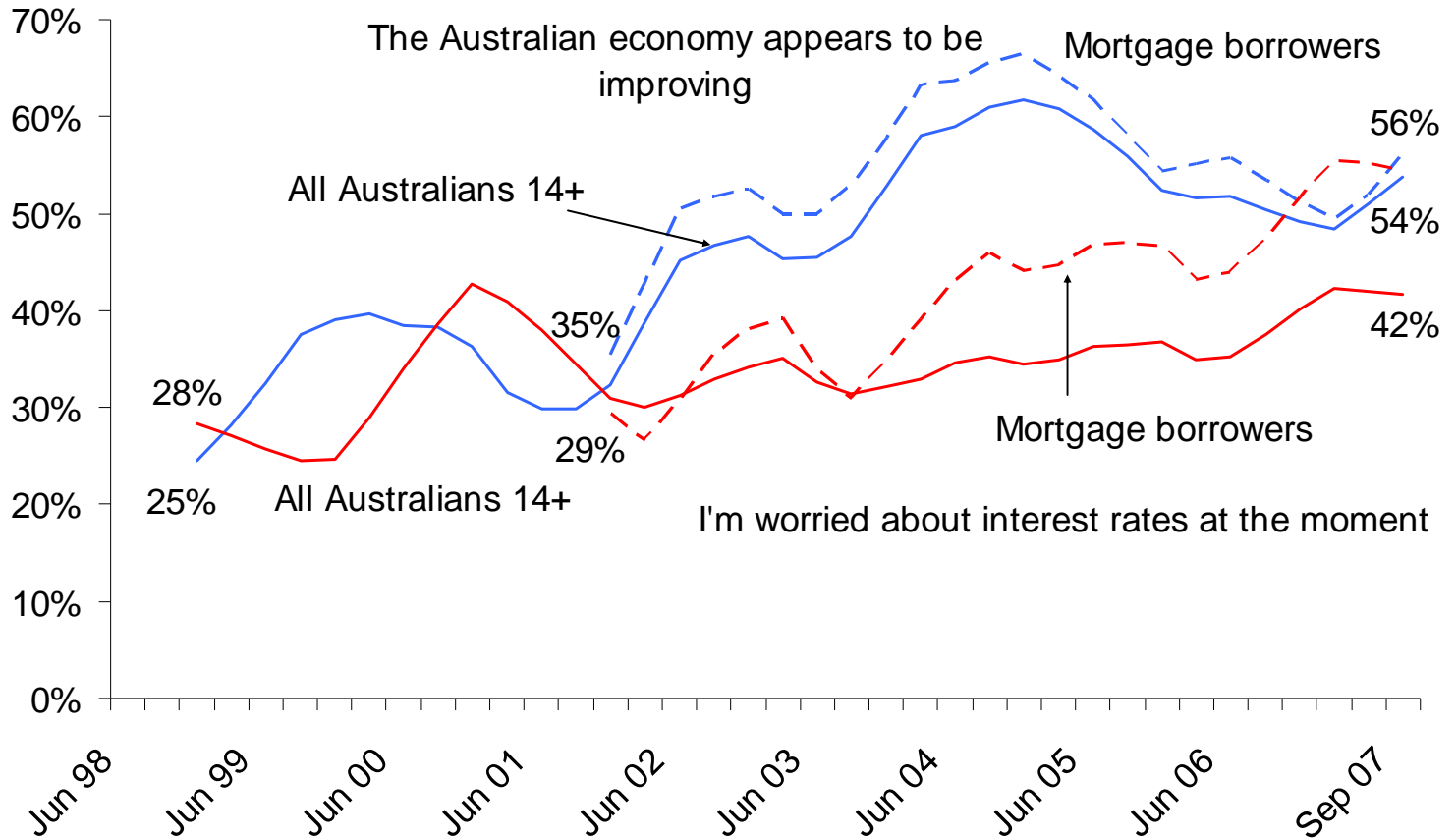
Consumer Confidence



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

Economy

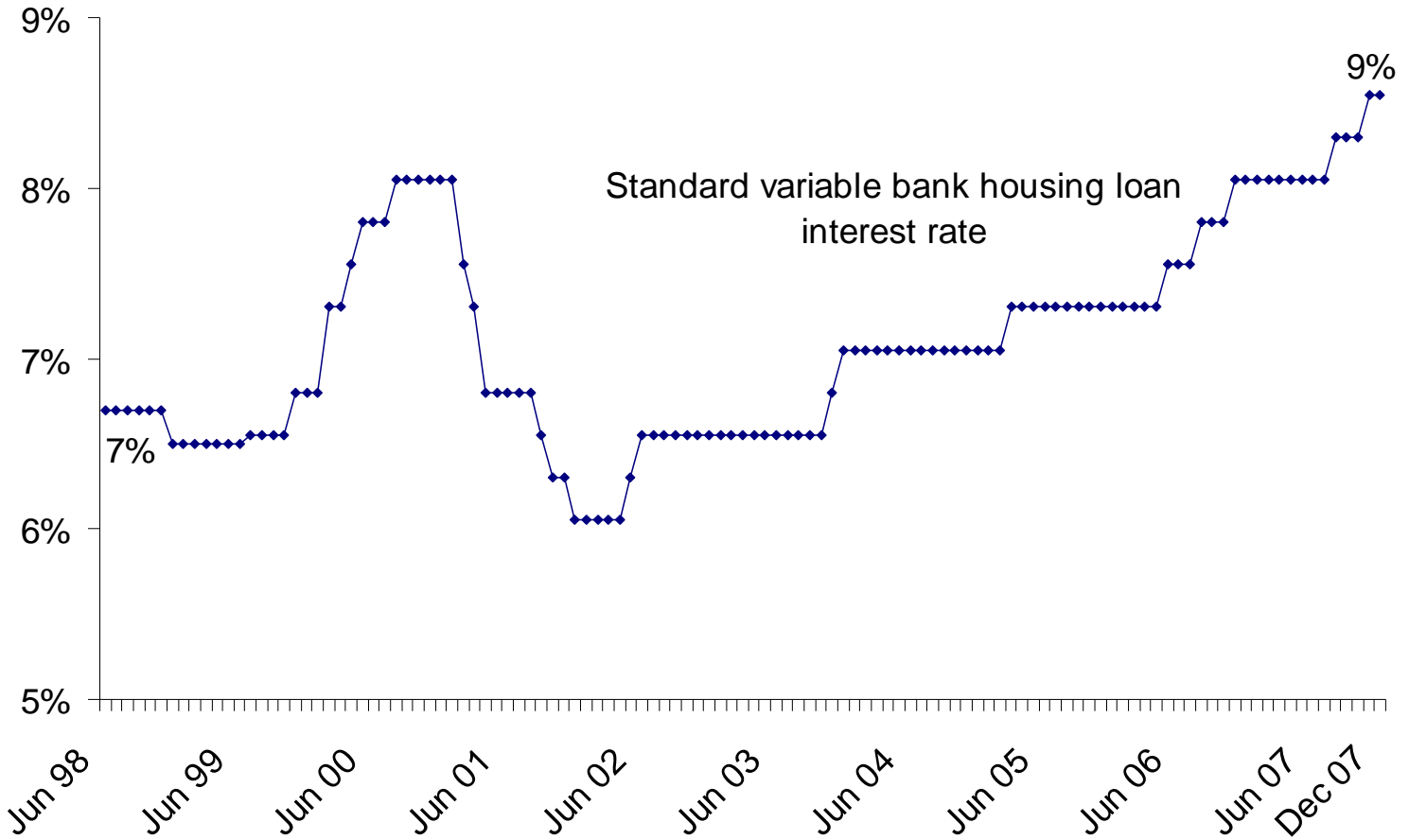
Worry Over Interest Rates Grows



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

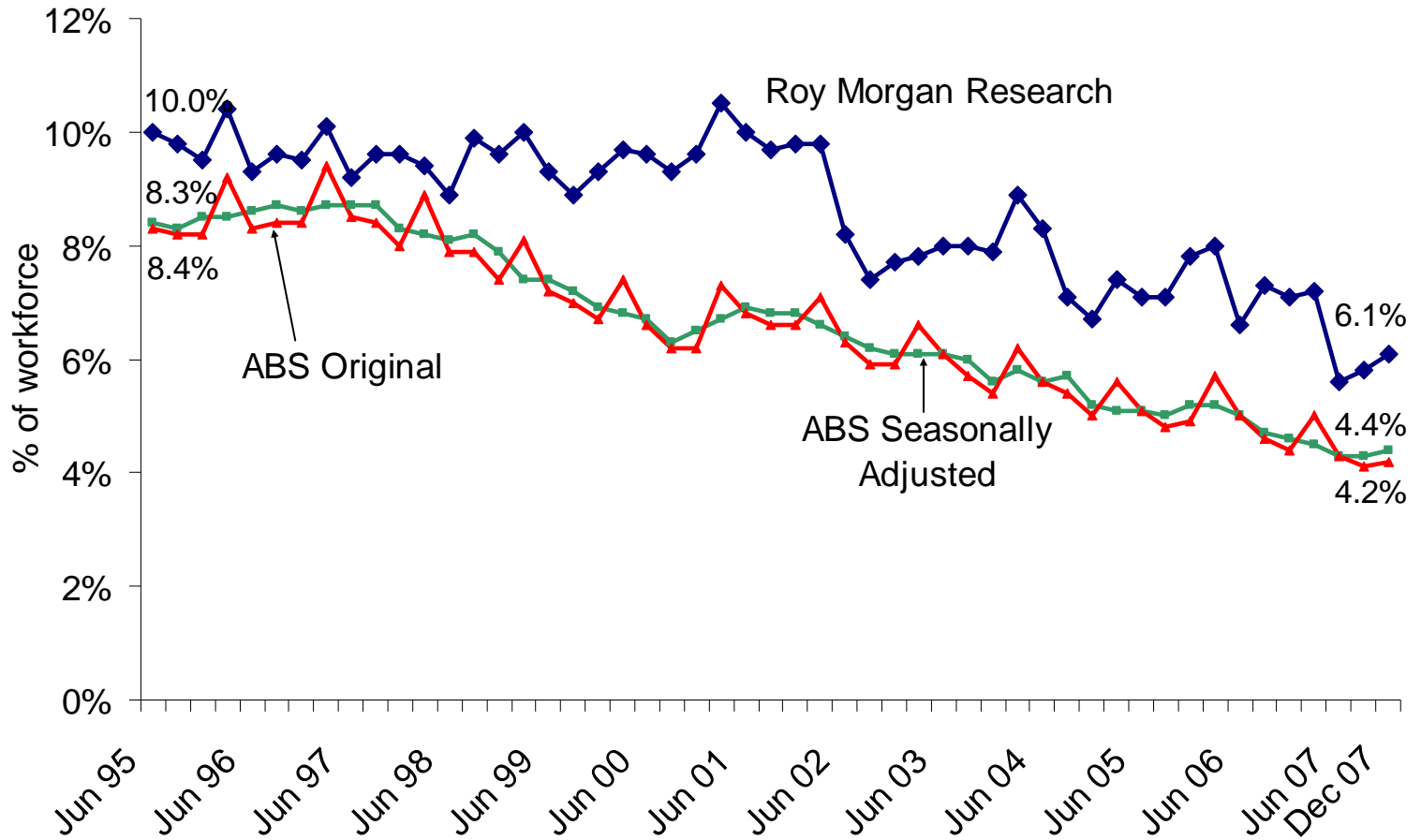
Economy

Housing Interest Rates



Source: Reserve Bank of Australia

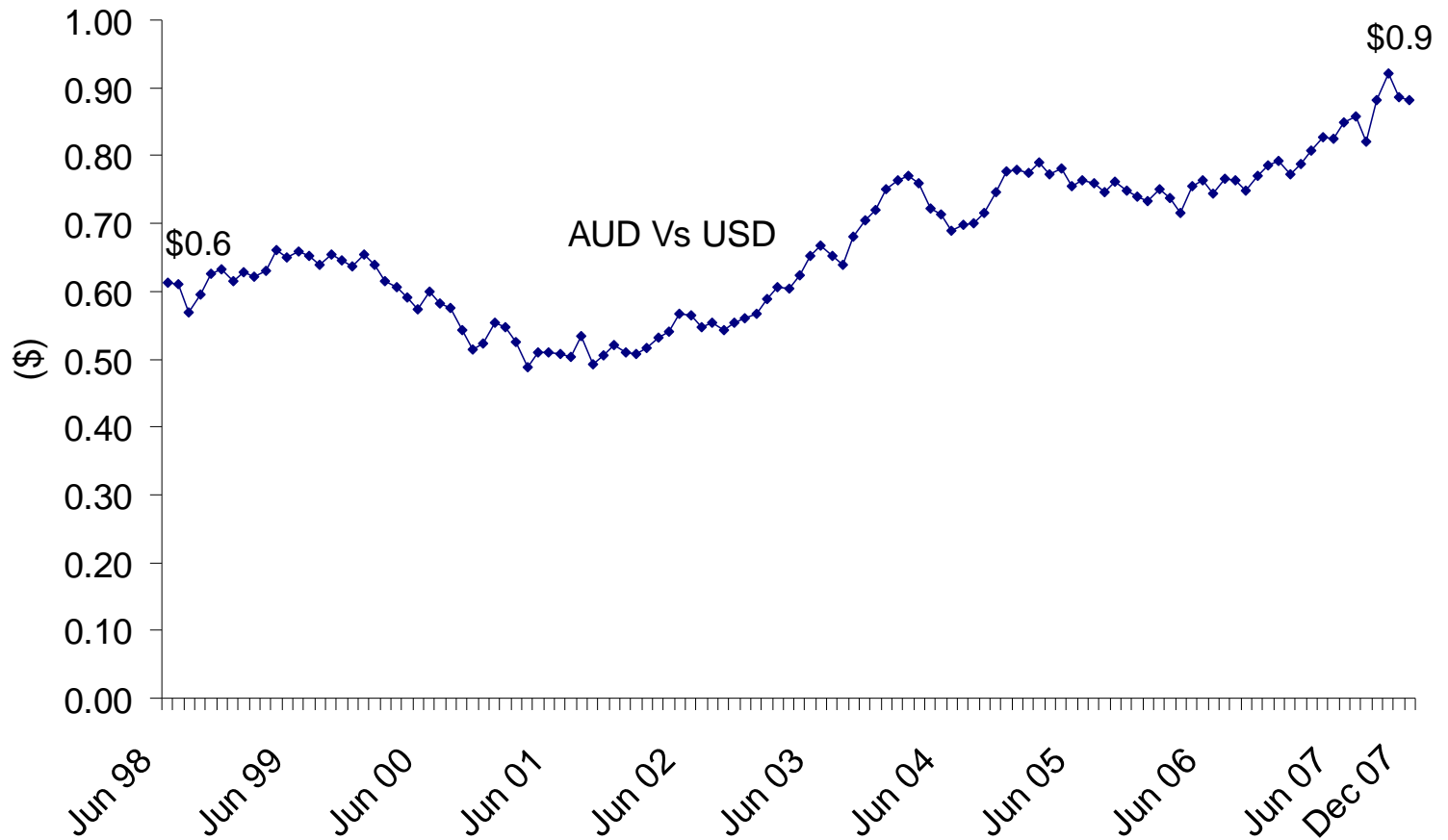
Economy Unemployment



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

Economy

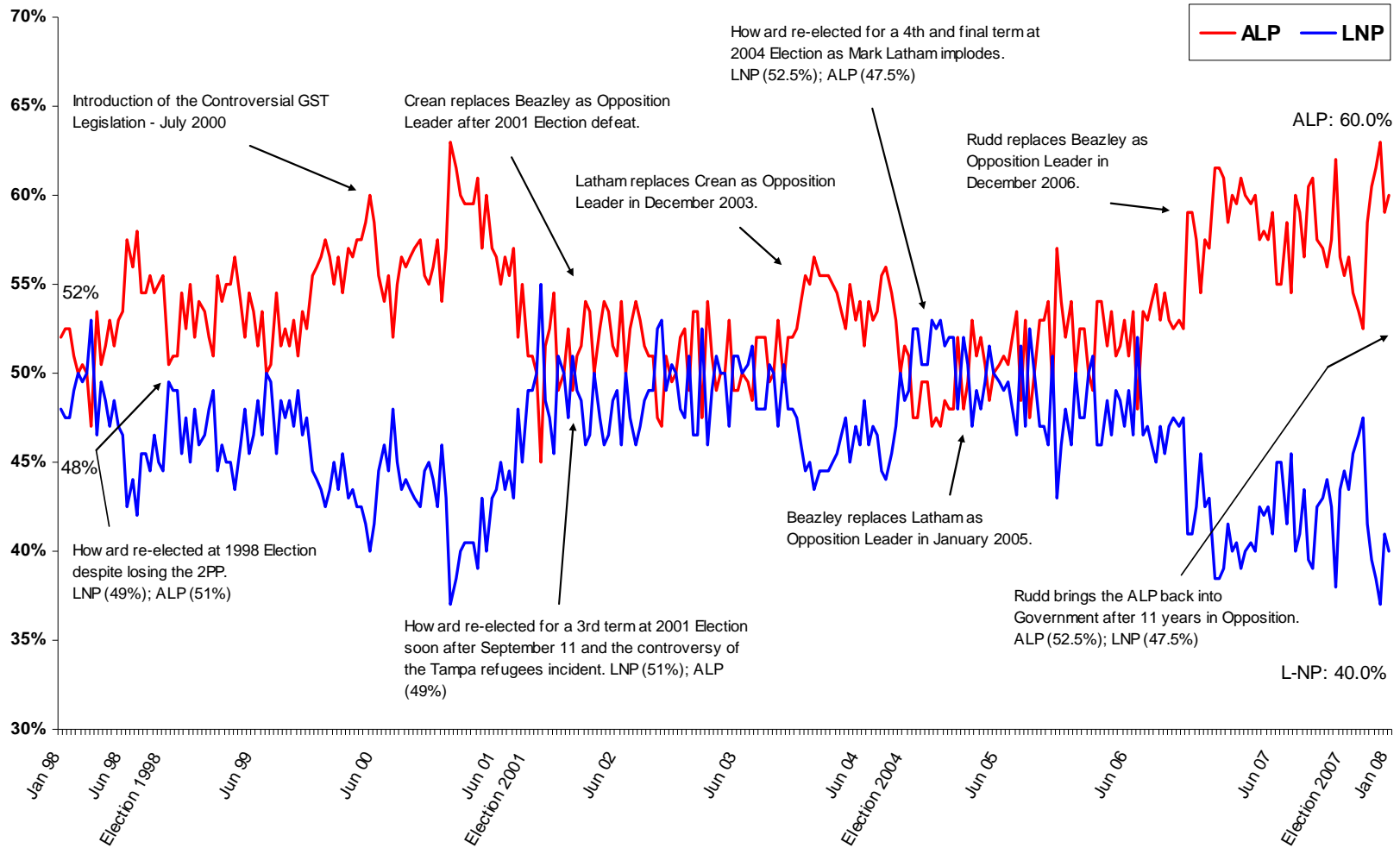
Exchange Rates



Source: Reserve Bank of Australia

Politics

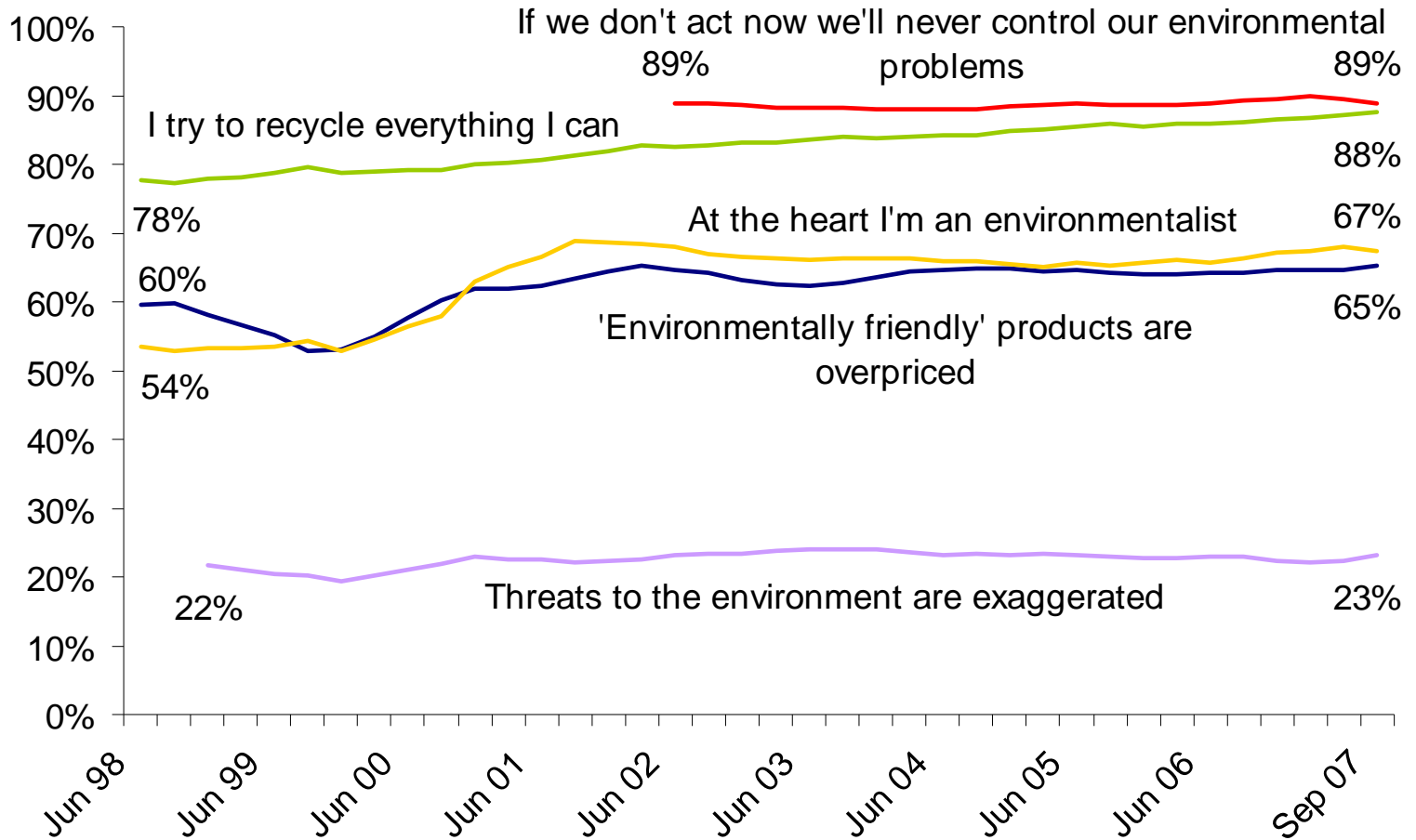
Voting Intentions



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

Environment

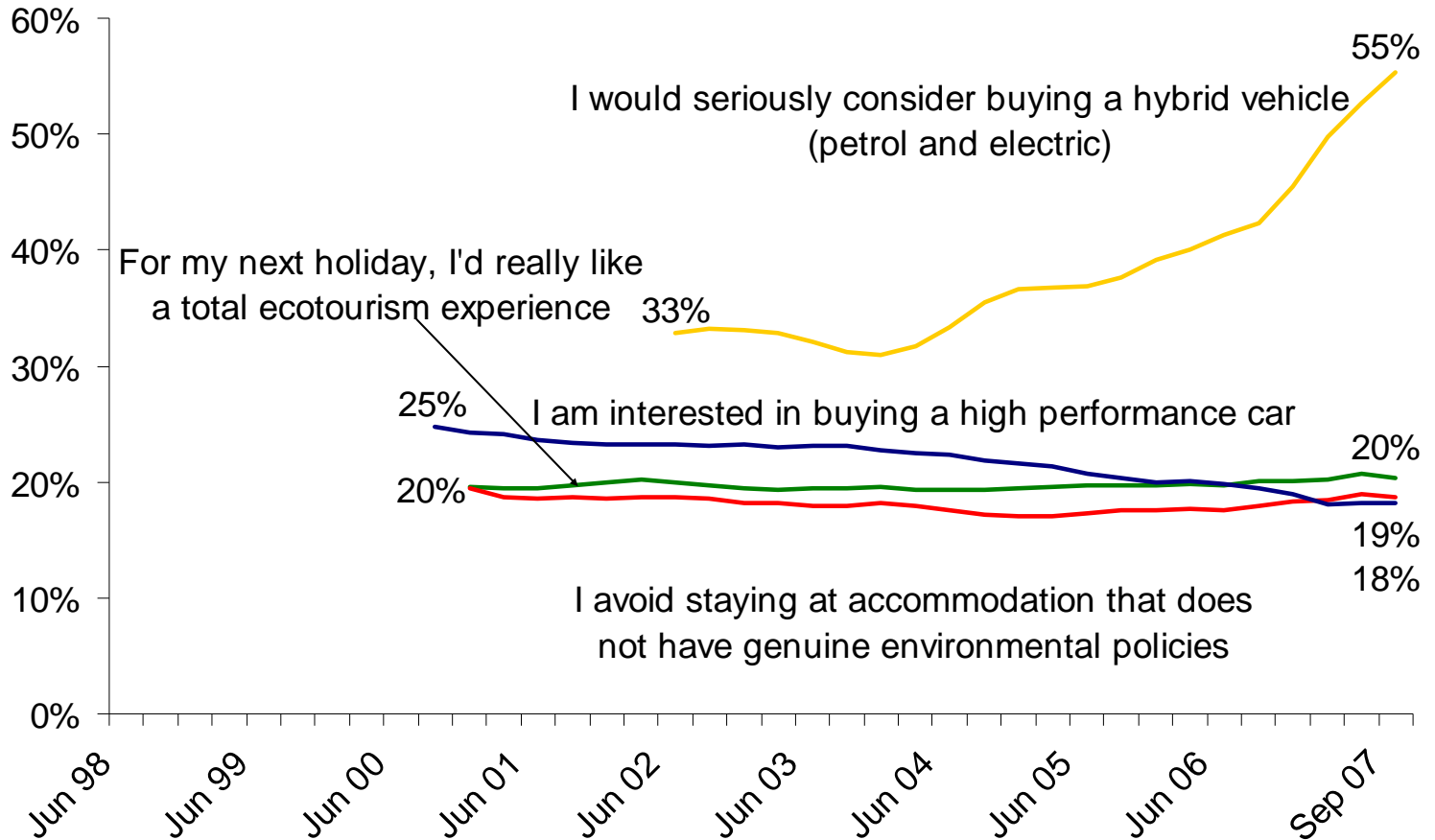
Environment as an Issue has come of Age



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

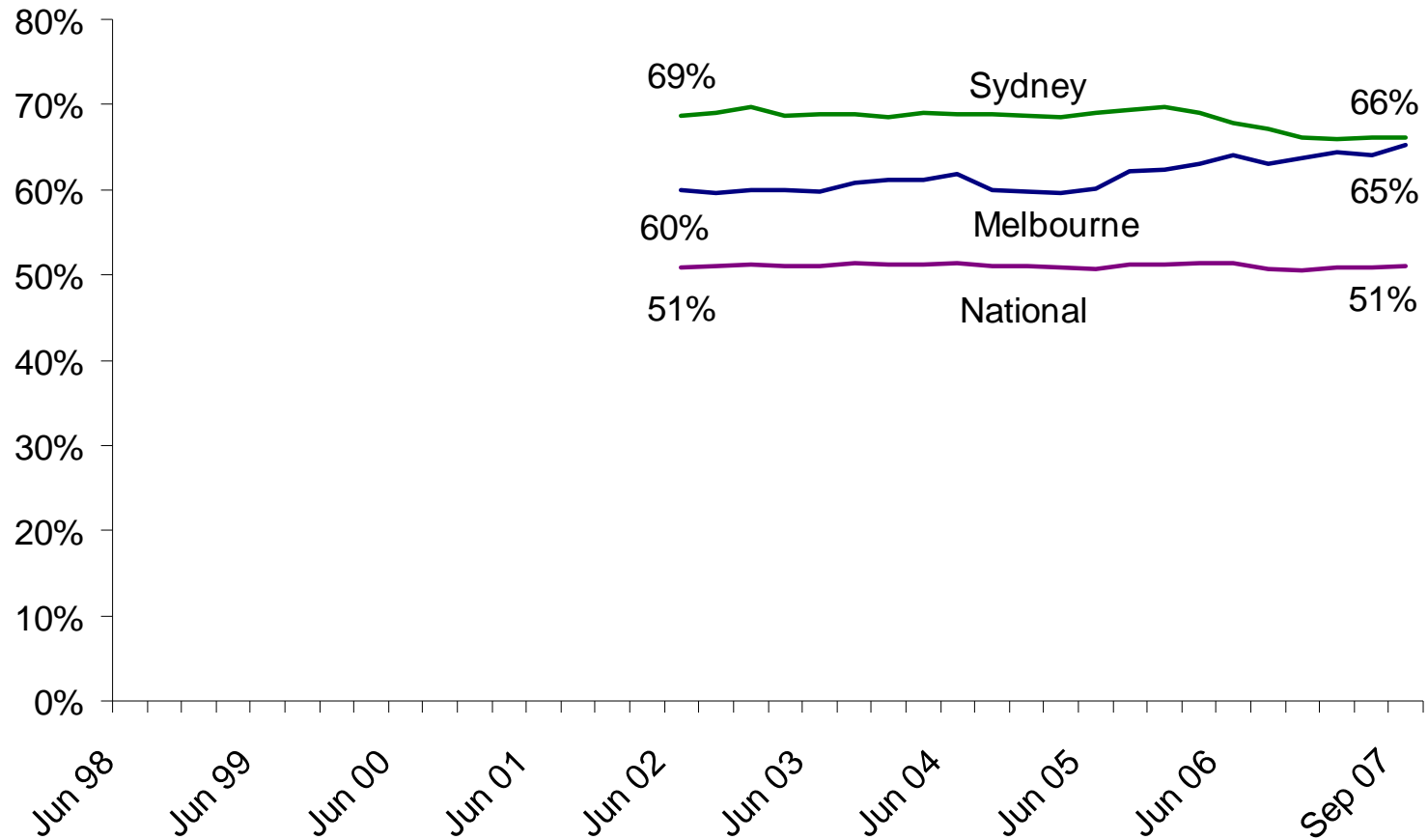
Environment

Taking Action is the Next Step



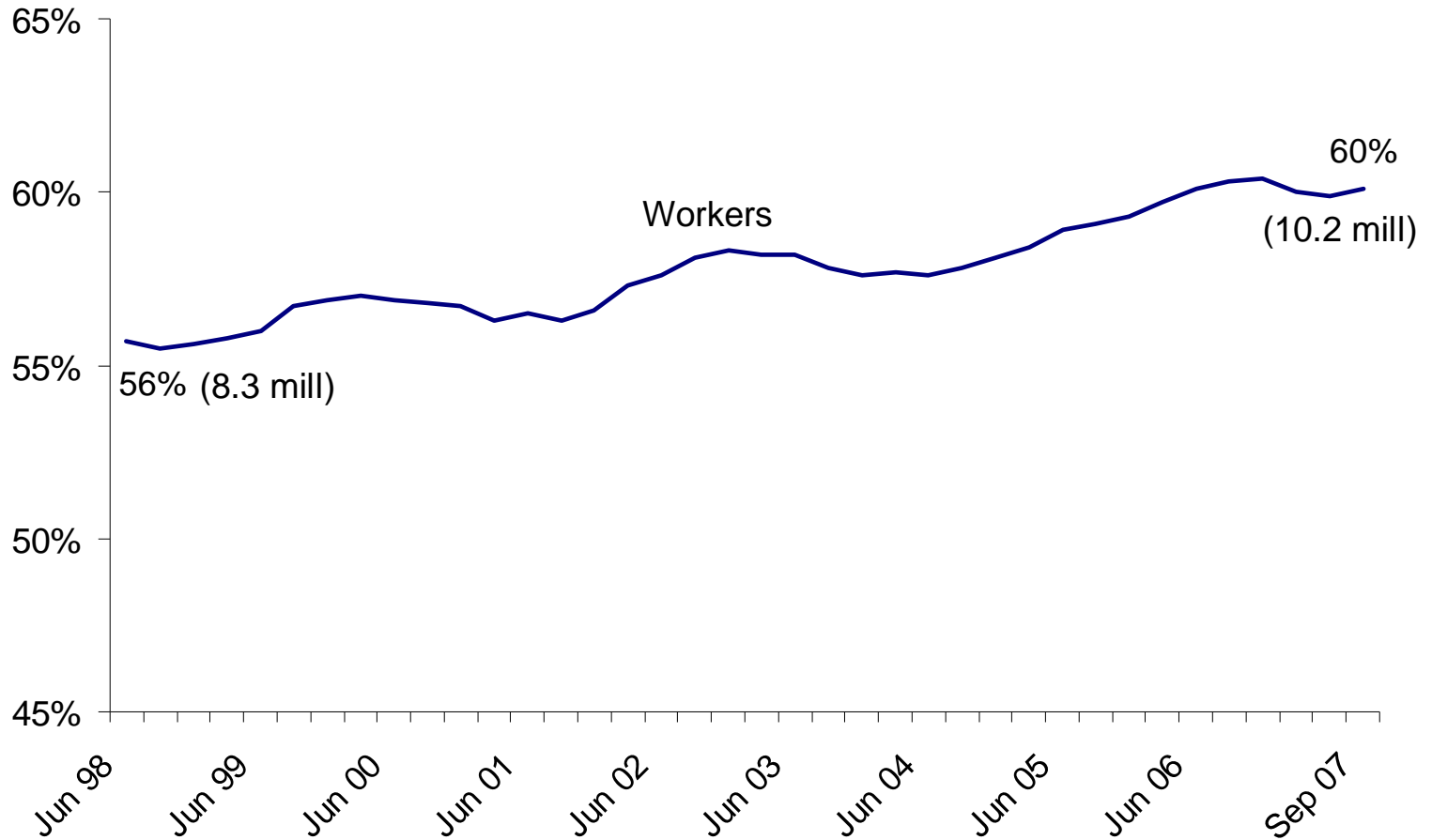
Base Aust Population aged 14+; Source: Roy Morgan Research (AUTO)

Environment Public Transport



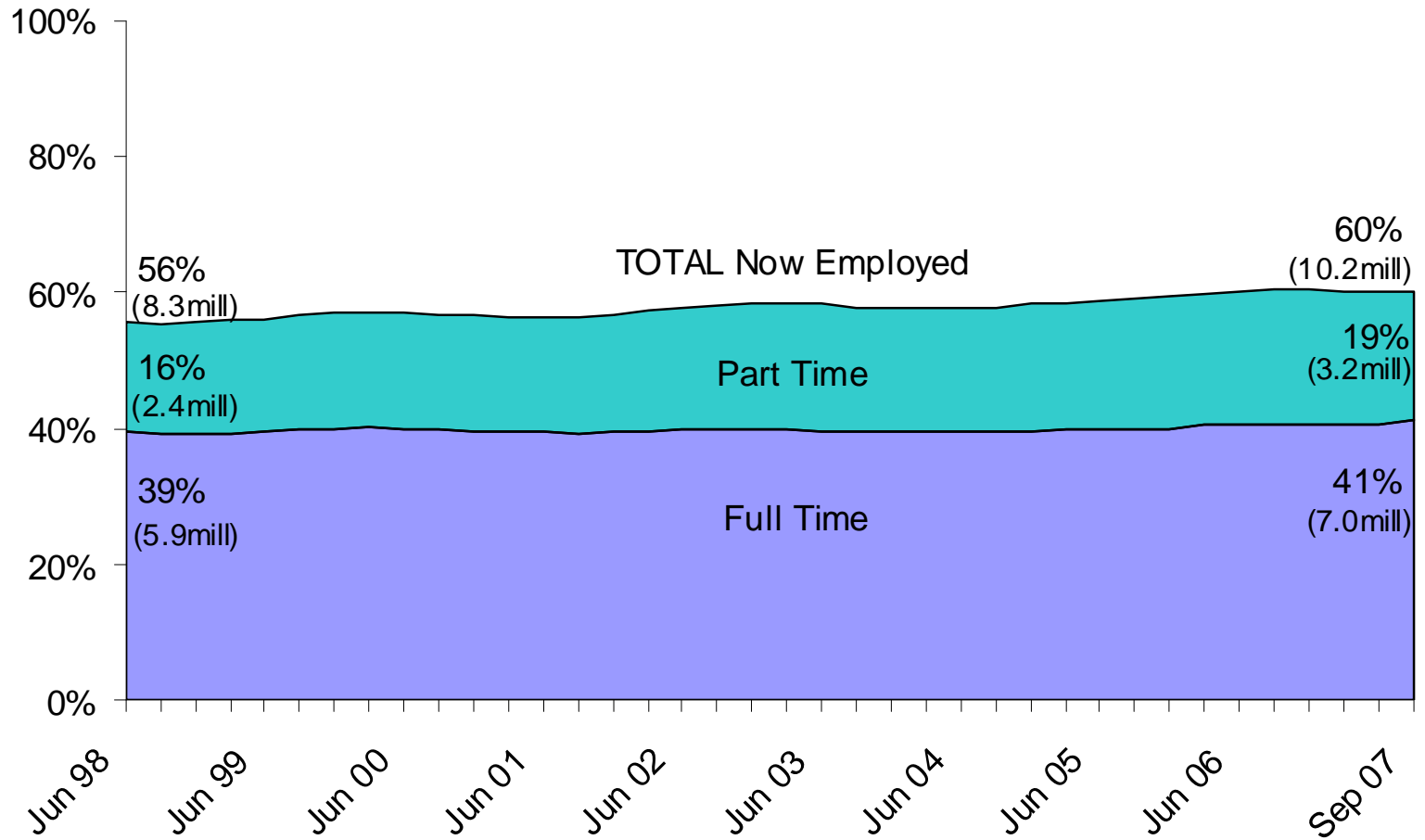
Base Aust Population aged 14+; Source: Roy Morgan Research (10M)

Increasing % of Australians Working



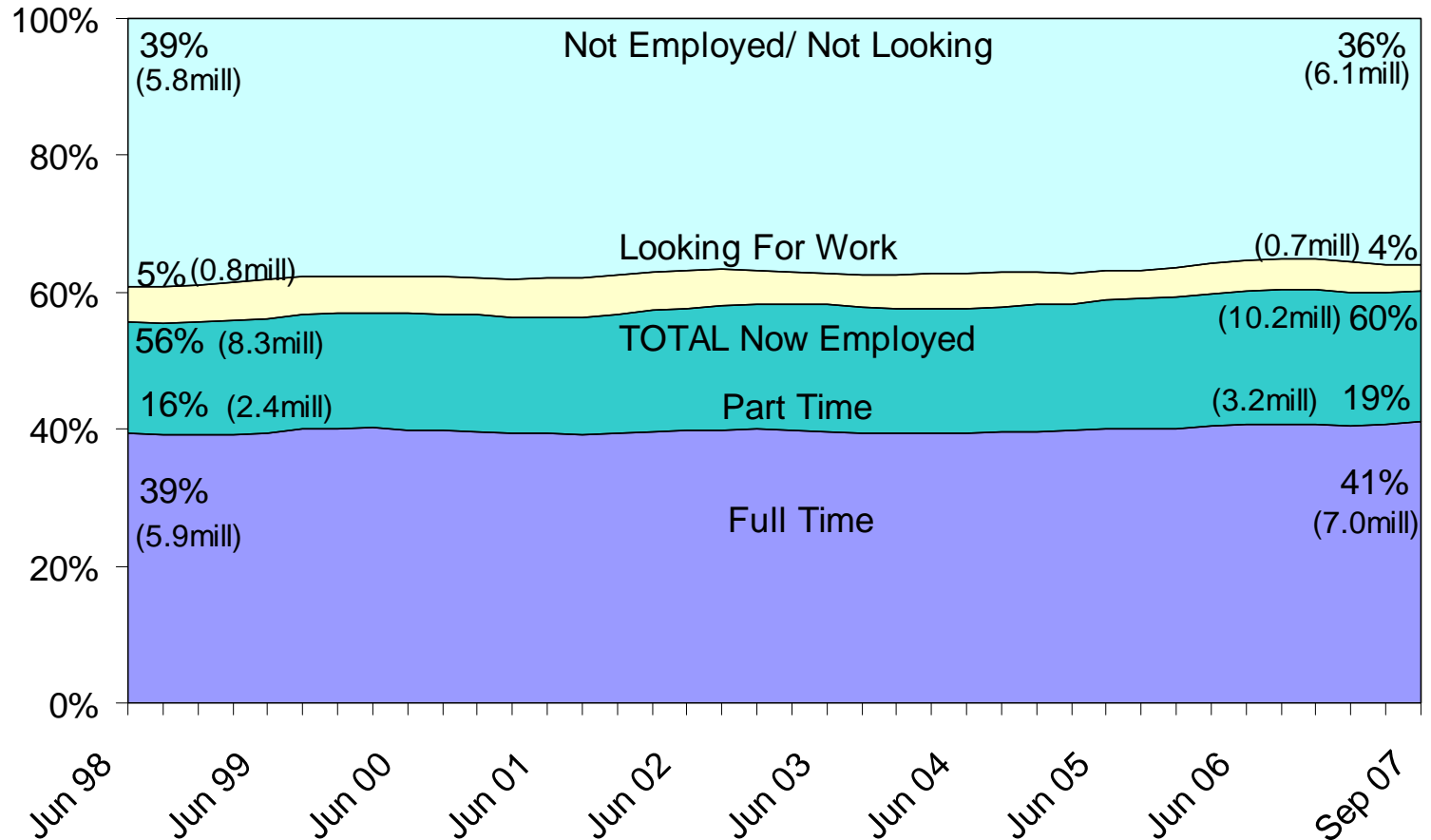
Base Aust Population aged 14+; Source: Roy Morgan Research (10M)

Increasing % of Australians in Employment



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

Increasing % of Australians in Employment



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

	Jun 1998	Sep 2007	
Full Time	39.5%	41%	7.0 million
Part Time	16.5%	**19%	3.2 million
Now Employed TOTAL	56%	60%	10.2 million
Looking for Full Time Work	4%	2%	
Looking for Part Time Work	1%	2%	
Looking for Work TOTAL	5%	4%	0.7 million
Retired	16%	19%	
Don't Work	3%	3%	
Home Duties	12%	7.5%	
Students	8%	6.5%	
Not Employed / Not Looking TOTAL	39%	36%	6.1 million
TOTAL POPULATION 14+	100%	100%	

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.