



**"WHAT'S KEEPING
AUSTRALIANS UP AT NIGHT?"**



CONTENTS



The reason for Ogilvy on Now	4
A dog eat dog society	12
Ageing, health and wellbeing	35
Childhood gone	45
War, terrorism and crime	48
Farewell to the Australian dream	54
Demographics focus	59
Concern and control	68
Final perspectives	76
Appendix	82
Methodology	88

THE REASON FOR **OGILVY** ON NOW

HISTORY

Ogilvy has always had its finger on the conscience of Australians. In recent years we conducted *The Yarn*, which explored the pillars of what it means to be Australian.

In 2009, we revised our research approach to maximise its value to clients. With a new methodology and a comprehensive database, we have captured a wealth of valuable information about the concerns facing Australians which we can bring to bear on our clients' business.

With a change in focus, methodology and output, we are proud to present to you *Ogilvy on Now*.

OGILVY ON NOW, IN A NUTSHELL

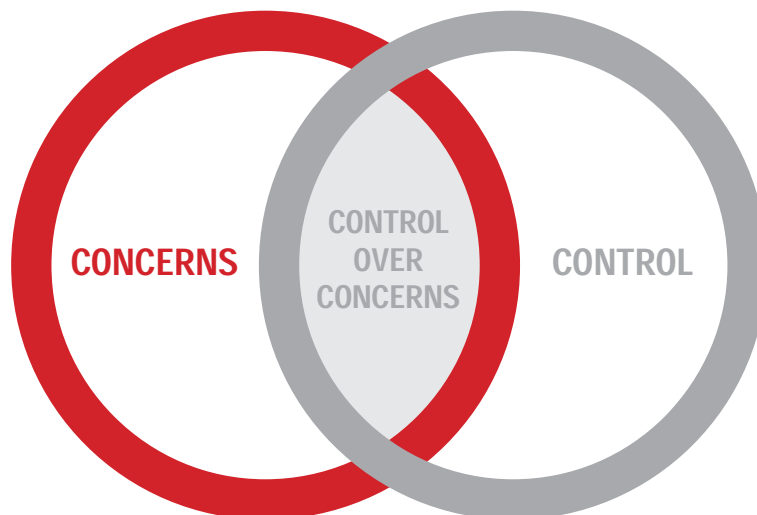
It's an exploration of what issues are keeping Australians up at night. We discovered what concerns Australians and measured their perceived control over those concerns, to uncover valuable insights on how our clients might respond and help Australians sleep soundly.



THE REASON FOR **OGILVY** ON NOW

THE INSPIRATION

Ogilvy on Now is inspired by Steven Covey's *Seven Habits of Highly Effective People*, in which he describes the circle of concern and the circle of influence. We thought it would be fascinating to replicate this on a national level. Our aim was to understand peoples' concerns and the degree of influence they think they have over these concerns.



HOW IT LINKS TO BRANDS

We included brand usage in the study to explore the differences between regular, irregular and non-users of brands. Equipped with this information, we reasoned that clients would have important insights to act as springboards for ideas that could drive greater engagement with their brands.



METHODOLOGY

The study had no agenda and no preconceived topics of interest. We wanted Australians to set the research agenda so we went out and asked them.

We conducted 12 focus groups across NSW and Victoria in both regional and metropolitan areas. We split groups out by gender and life-stage.

We identified 68 issues in total – and put them into a nation-wide poll to measure how concerned Australians were about them, how much control they felt they had over them and how they would rank them in order of concern.

Our results are based on a robust sample of 1015 online respondents managed by ORU, Australia's only online panel management and online fieldwork company to have achieved the QSOAP (Quality Standard for Online Access Panels) 'Best Practice' level of accreditation.



THE DIMENSIONS OF OUR FINDINGS

CONCERNS

1. Ranking
2. Highly concerned
3. No to low concern

CONTROL

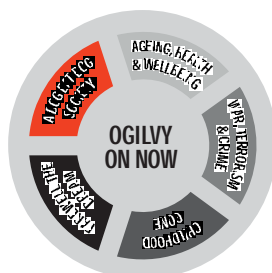
1. Ranking
2. High perceived control
3. No to low perceived control

DEMOGRAPHICS

1. Age
2. Life-stage
3. Gender
4. Location
5. Financial status

BRANDS

1. Regular usage
2. Irregular usage
3. No usage



A NOTE ON **VERBATIMS**

White text on a red background means it is a verbatim explaining the respondent's degree of **CONCERN**.

Red text on a black background means it is a verbatim explaining the respondent's degree of **CONTROL**.

Red text on a white background means it is a verbatim from **QUALITATIVE** research groups.



AUSTRALIA IS BUILT ON VALUES

While Australians have many personal concerns, their greatest concern is the changing state of their society and its behaviour, such as the lack of common decency between each other, questionable business practices, and duplicity of political leaders.

Sum Issues Concerned About: NETT Agree (8/10)		Total
1.	How Disrespectful People Are Of Public Property	67%
2.	Growing Lack Of Respect & Considerations For Others	65%
3.	Companies Are Charging Me To Pay My Bills	61%
4.	Children Exposure. To Things Prematurely/Internet & TV	60%
5.	Terrible Customer Service From Intl Call Centres	58%
6.	The Rising Cost Of Groceries In Australia	57%
7.	The Number Of Broken Promises By Aust. Politicians	55%
8.	Over Use Of Artificial Ingred/Preservations In Food	54%
9.	Huge Increase Of Obesity In Australia	50%
10.	Wars Taking Place All Over The World Never Stop	48%

Australia is a society beginning to suspect that we no longer live by the values of mutual respect and fairness we held so dear.

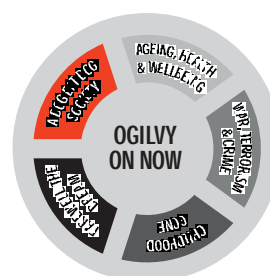
In short, we're not looking out for each other any more.



AUSTRALIA'S TOP 20 REASONS NOT TO SLEEP AT NIGHT

By expanding our focus to the Top 20 concerns, we can identify some broad themes.

Sum Issues Concerned About: NETT Agree (8/10)		Total
1.	How Disrespectful People Are Of Public Property	67%
2.	Growing Lack Of Respect & Considerations For Others	65%
3.	Companies Are Charging Me To Pay My Bills	61%
4.	Children Exp. To Things Prematurely/Internet & TV	60%
5.	Terrible Customer Service From Intl Call Centres	58%
6.	The Rising Cost Of Groceries In Australia	57%
7.	The Number Of Broken Promises By Aust. Politicians	55%
8.	Over Use Of Artificial Ingrid/Preservations In Food	54%
9.	Huge Increase Of Obesity In Australia	50%
10.	Wars Taking Place All Over The World Never Stop	48%
11.	The Poor Quality Of Public Health Care In Australia	48%
12.	How Getting Old Will Affect My Physical Ability	47%
13.	The Negative Affect Of Terrorism On The World	47%
14.	More & More People Seem To Be Diagnosed With Cancer	47%
15.	That There Is No Discovered Cure For Alzheimers	45%
16.	That I Am Not Exercising Nearly Enough	45%
17.	Terrible State Of Care Provided By Public Hospitals	43%
18.	Not Able To Save Money To Travel As I Would Like	42%
19.	Large Pharm. Comp Too Much Influence On Government	42%
20.	How Getting Old Will Affect My Mental Capacity	41%

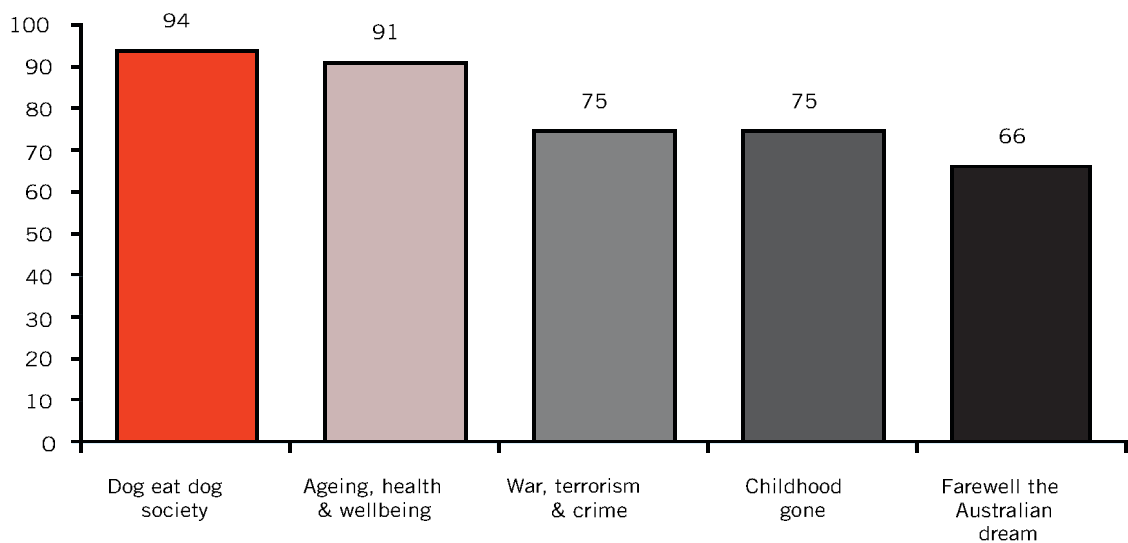


WE CAN CLUSTER THESE THEMES

We've found five mega-themes among the 68 concerns we identified:

1. Dog eat dog society
2. Ageing, health & well-being
3. Childhood gone
4. War, terrorism & crime
5. Farewell to the Australian dream

% of Australians who are highly concerned



This chart shows what percentage of Aussies feel highly concerned about at least one concern within a mega-theme.



MEGA THEME A: A DOG EAT DOG SOCIETY



A DOG EAT DOG SOCIETY

There are three dimensions to this theme. First, Aussies feel that respect for others is dying. Second, they feel like businesses aren't dealing with them fairly. And third, they feel politicians can't be relied on.

In short, there's a lot less respect going around.

1. RESPECT FOR OTHERS IS DYING

Australia's greatest concern is about the alarming lack of respect for each others. Whether it is just how we treat other, or how we treat common property, Aussies are shaking their heads in disbelief. We simply aren't showing each other the common decency, care and respect with which we've grown up.

Our lack of concern for others is expressed in two ways. First, as a lack of respect for public property (67%).

"People are becoming ruder and less caring and respectful of property that is there for all to enjoy."

"Young people are not taught respect for other peoples' property."

"It reflects overall lack of respect for anyone, anything, or themselves."

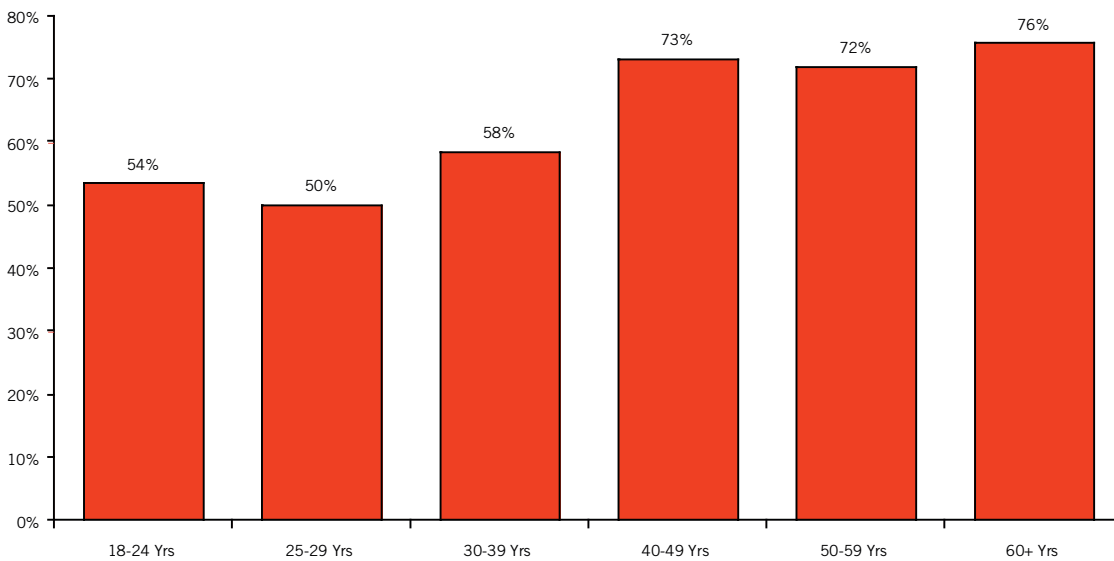
There is a lot of frustration at what seems a senseless and destructive trend, and the youth are prime suspects.



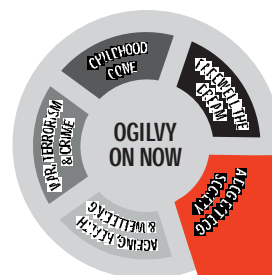
A DOG EAT DOG SOCIETY

While older Aussies feel most strongly about this, younger Aussies share the sentiment.

How Disrespectful People Are Of Public Property



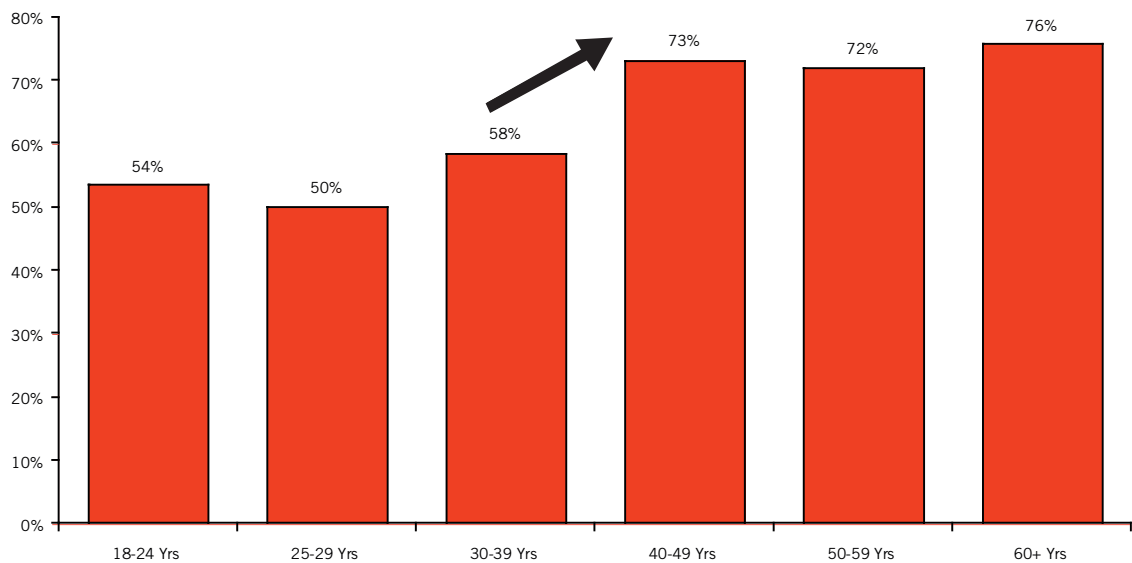
"People are confined in their own worlds and do not care about each other." 25-29 yrs



A DOG EAT DOG SOCIETY

There is an interesting increase in concern at 40+ yrs. We notice that older people feel more concerned about more issues.

How Disrespectful People Are Of Public Property



Our hypothesis for this effect, is that our scope of concerns widens as we get older, as we take more personal commitments (like children) and financial commitments (like property).



A DOG EAT DOG SOCIETY

The second way their concern about lack of respect is expressed is as a growing lack of respect and consideration for others, at 65%.

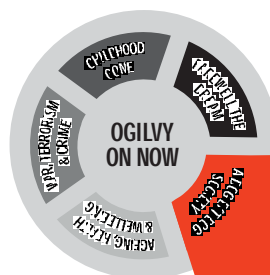
"A downward spiral into a selfish and aggressive society."

"It seems we are becoming an 'every man for himself' society."

"It is shocking that there is no real connection between people these days."

"Kids aren't disciplined and don't respect their elders."

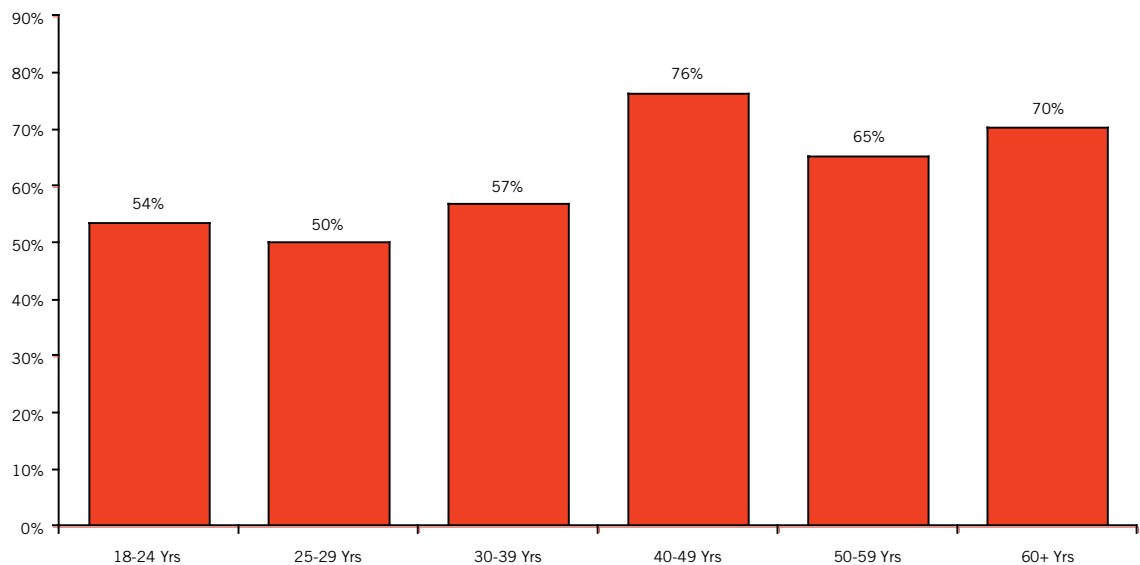
While the youth are again the prime suspects in these two concerns, there is the perception that we are *all* losing touch with each other.



A DOG EAT DOG SOCIETY

When we look at the various age groups, however, we see the youth feel the same way as older Aussies on this issue, too.

Growing Lack Of Respect & Consideration For Others



"It has become a 'me' society. Society's attitude is based upon personal gains and well being, instead of caring more for others and having a community." 18-24 yrs



A DOG EAT DOG SOCIETY

It is critical to recognise that young and old, Aussies are concerned about this lack of respect, together.

"People aren't teaching their children manners or values and people are getting more and more rude. From elderly to children, and society will just be full of rude, inconsiderate people." 18-24 yrs

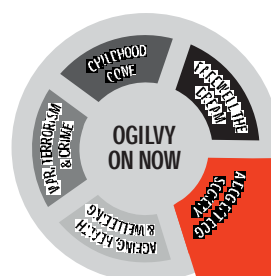
"Teenagers have no respect or consideration." 25-29 yrs

And throughout all age groups, many people think the source of the problem is those younger than themselves!

Before we point the finger at Aussie teenagers, perhaps we should consider this quote:

"Children nowadays are tyrants. They contradict their parents, gobble their food, and tyrannise their teachers."

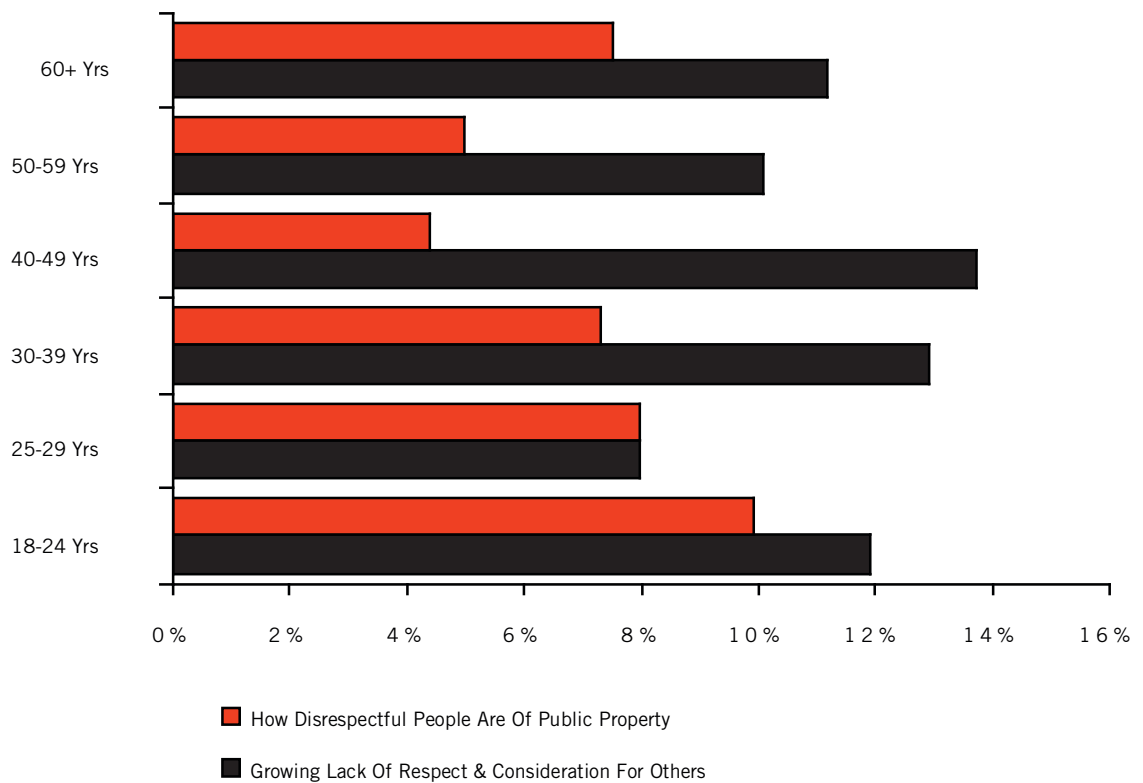
Socrates, 469-399 BC



A DOG EAT DOG SOCIETY

Aussies also feel the problem of respect is bigger than them. When we looked at the control data, we found the percentage of Aussies who feel they have a high degree of control over these issues is actually really small.

% Aussies who feel they have high control over...



A DOG EAT DOG SOCIETY

Aussies perceive the problem of lack of respect is beyond their control.

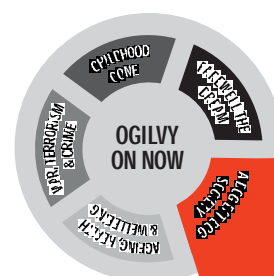
"Well, what CAN I do? Run around screaming like a maniac?" 60+ yrs

"If you say something, you get 20 kids kicking ya head in." 40-49 yrs

"I can only control my own family. You teach them to do the right things and they get stepped on." 40-49 yrs

"This is all due to lack of education." 18-24 yrs

We feel powerless to make a difference beyond teaching our own children, who might be ridiculed for respectful behaviour. Worse yet, we have fear for our own safety by speaking up.



A DOG EAT DOG SOCIETY

So why do Aussies believe this is happening?

"When society raises you to be selfish, and you have technology that means you don't socialise to gain people skills, these attitudes are the result." 30-39 yrs

"The whole world is dead set on not dealing out any significant consequences for children's behaviour. They can shout, and swear at teachers, and these teachers have no way to discipline these kids!" 25-29 yrs

"There is no sense of community. You keep to yourself, better to be safe than sorry." Female, young family, Melbourne



A DOG EAT DOG SOCIETY

In our qualitative step in the research, we found these perceptions behind the changes in peoples' attitudes:

A. LACK OF TIME

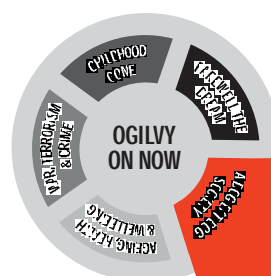
Australians are worried about the lack of balance in their lives. They feel like they're always under time pressure. As a nation we are so busy running around trying to get things done that we have no time for volunteering, for community, or taking a moment to chat to a stranger.

"A lot of my daughters friends get picked up by nannies everyday – they're lucky to see their parents." Male, established family, Sydney

"My life is such a rush. I feel like I'm rushing everywhere. Like taking on too much. Burning myself out." Female, single, Sydney

With parents spending so little time at home, is it really surprising that we think children are not receiving the guidance they need to grow up with strong moral centres?

Our lack of time also helps explain the breakdown in community. Busy Aussies choose to invest what little time they have in maintaining relationships with their families; they don't have any time left to develop relationships with their neighbours or community.



A DOG EAT DOG SOCIETY

B. MATERIALISM

Aussies believe we're becoming too materialistic. We're too busy competing with each other and trying to impress each other that we can't appreciate each other as genuine individuals.

On top of this, we're working longer hours to chase the dollar, and this gives us less discretionary time to spend on each other. Ogilvy has been following this trend for a couple of years now. In the STW Report 2008, we found 64% of Australians think the modern world is too unfriendly, and this is having a negative impact on relationships.

The main culprit of our rampant materialism is the media, and advertising. Magazines are seen to paint an impossible picture of how our lives should appear in terms of personal appearance, lifestyle and possessions. And advertising is seen to vulture on the ensuing uncertainty as a Australians contrast this with their reality.

C. BREAKDOWN OF FAMILIES

Aussies feel that the high percentage of family breakdowns is another reason for our decaying values. They believe that we're growing more selfish, and our ready acceptance of divorce as solution to domestic conflict fuels our individualistic focus. They feel that marriage is no longer treated as a lifelong commitment, and this sets an example of giving up, rather than working through problems.

The rise of single parent families is viewed as an unfortunate result, because these parents cannot be expected to juggle a full time job in a materialistic society with the time demands of raising ethically balanced children.



A DOG EAT DOG SOCIETY

D. POOR PARENTING

Aussies told us parents have a lot to answer for when it comes to the lack of respect that people show. They blame parents for spoiling their children and believe that nothing that parents give their children is a real treat – children expect to be showered with gifts.

Aussies believe poor parenting is the result of the witch's brew of time pressure, work pressure, divorce and rampant materialism. The result is that kids run riot.

E. TECHNOLOGY

We feel that technology interferes with the way we engage with each other, blurring the distinction between private and public, and confounding technology 'immigrants' who do not understand the new social norms of respect and politeness when technology is involved.

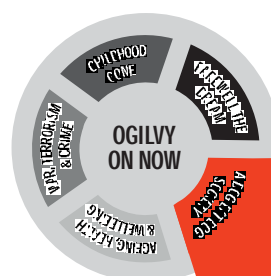
We also found that even our young respondents feel the pressure of never being able to switch off and "go dark", from time to time.

F. DISCIPLINARY DISEMPOWERMENT OF AUTHORITIES

Aussies feel that teachers and parents battle to instil respect and values in children because they have little disciplinary authority. They believe power is in the hands of the children and teenagers, and feel impotent to enforce changes in behaviour.

They notice how many young P-platers dangerously drive around in powerful cars (often turbo-charged), and seem to be beyond the reach of the law.

In short, the custodians of social norms (viz. parents, teachers and law enforcement) no longer have the power to discipline the youth, or enforce acceptable social behaviour.





"Crime. It affects innocent people and the punishment so often is not in proportion to how it affects the victim."

Female, Sydney, Transition to Retirement



"People leaving shopping trolley's in a lane way and graffiting the wall."

Female, Sydney, Single



"Junk mail in the letterbox marked NO Junk Mail."

Female, Sydney, Transition to Retirement

A DOG EAT DOG SOCIETY

2. BIG BUSINESS ISN'T PLAYING FAIR

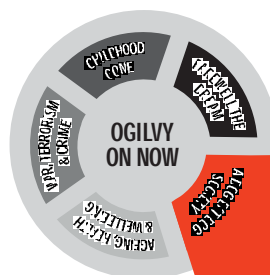
61% of Australians are seething about businesses charging them to pay their bills.

"How bloody desperate must firms be to even countenance such an act of bastardry!"

"No-one should have the legal right to do this. A self-employed person cannot do it, so why are the large companies allowed to do it?"

"It is morally wrong."

Australians see charging for paying bills as legalised daylight robbery.



A DOG EAT DOG SOCIETY

58% of Aussies are frustrated at the terrible customer service from international call centres.

"It is soooooo frustrating trying to talk to people who cannot speak and, at times, don't understand English."

"I never liked the fact that we take these jobs overseas, just so corporates can make more money."

Australians are frustrated by the poor service they get as a result of the language barrier. And they are indignant that these call centre jobs have been taken away from Australians. They feel corporations are making life harder for them, and pocketing the savings.



A DOG EAT DOG SOCIETY

The rising cost of groceries alarms 57% of Aussies.

"I'm on the old age pension and I want to eat healthy food to maintain my wellbeing and not get sick."

"It's becoming more expensive daily to maintain health and diet."

"We're being ripped off by Woolies and Coles."

Australians clearly link good food to good health, and are angered by how the perceived monopoly on groceries is preventing them from healthy, balanced living. Might this explain the growth in farmers' markets, as they seek alternatives?



A DOG EAT DOG SOCIETY

60% of Aussies feel they have very little or no control over the rising cost of groceries.

"Large companies set prices together."

"We're held to ransom by the providers."

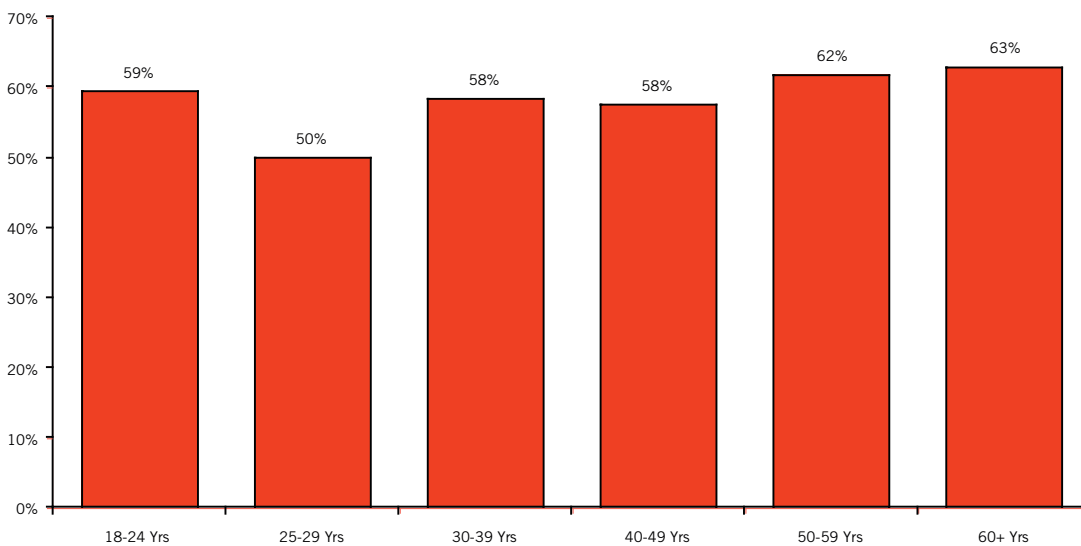
"The greedy bastards in the big chain stores don't give a damn about the customer, only making money, and they destroy all the small businesses who try to come up against them."



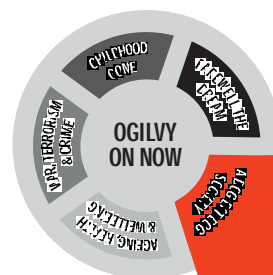
A DOG EAT DOG SOCIETY

All age groups feel the same way, with 25-29 year olds feeling the least concerned.

% who feel they have very little or no control over the rising cost of groceries in Australia



Aussies see the grocery chain stores as a necessary evil. They rely on these stores to eat, but there is no love lost.



A DOG EAT DOG SOCIETY

3. YOU CAN'T RELY ON POLITICIANS

55% of Aussies are concerned about the number of broken promises by Australian politicians. 37% are concerned with the corruption of state or local government, while 35% believe the government never seems to get anything done.

"They always lie for votes."

"It affects our way of life – it's teaching children that dishonesty is acceptable."

There is overwhelming cynicism toward Australian politicians, and it is generally accepted as fact that they all lie and cajole themselves into power.

A full 60% of Aussies feel they have no to very little control over the way that politicians break so many promises. Only a paltry 5% feel they have a high degree of control over this concern.

"Politicians are all the same."

"No-one, except the large corporations and magnates, can influence politicians."

"My vote makes no difference."

Aussies seem resigned to fact that they'll never trust their politicians. They have accepted it as a fact of life.

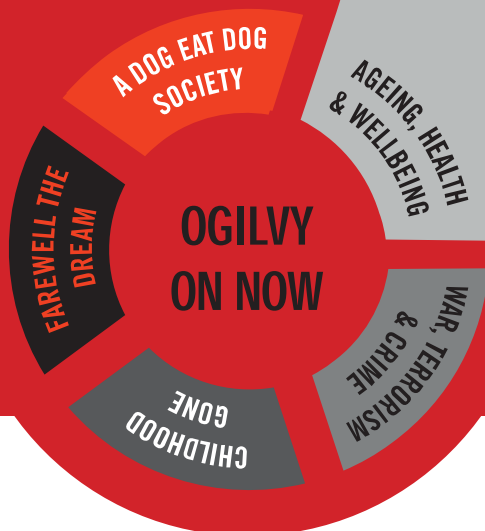




"Worried about the dangers and conditions of our roads and highways."

Male, Dubbo, Young Family

MEGA THEME B: AGEING, HEALTH & WELLBEING



AGEING, HEALTH & WELLBEING

Three sets of concerns intersect to form this theme. Australians, an ageing population, are becoming increasingly aware of healthy living, and they are concerned about how to maintain a good quality of life as the public healthcare system buckles under the strain.

1. WE'RE NOT GETTING ANY YOUNGER!

Australia is an ageing population, so it is unsurprising that the implications of growing older should feature prominently.

However, the major concern around ageing was losing physical abilities (47%), and mental abilities (41%). The effects of old age on appearances is far less important (21%).

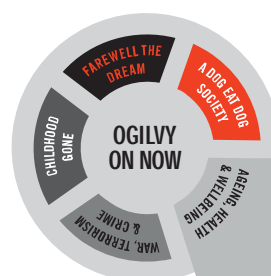
Australians are far more concerned about their quality of life than on vanities, like physical attractiveness.

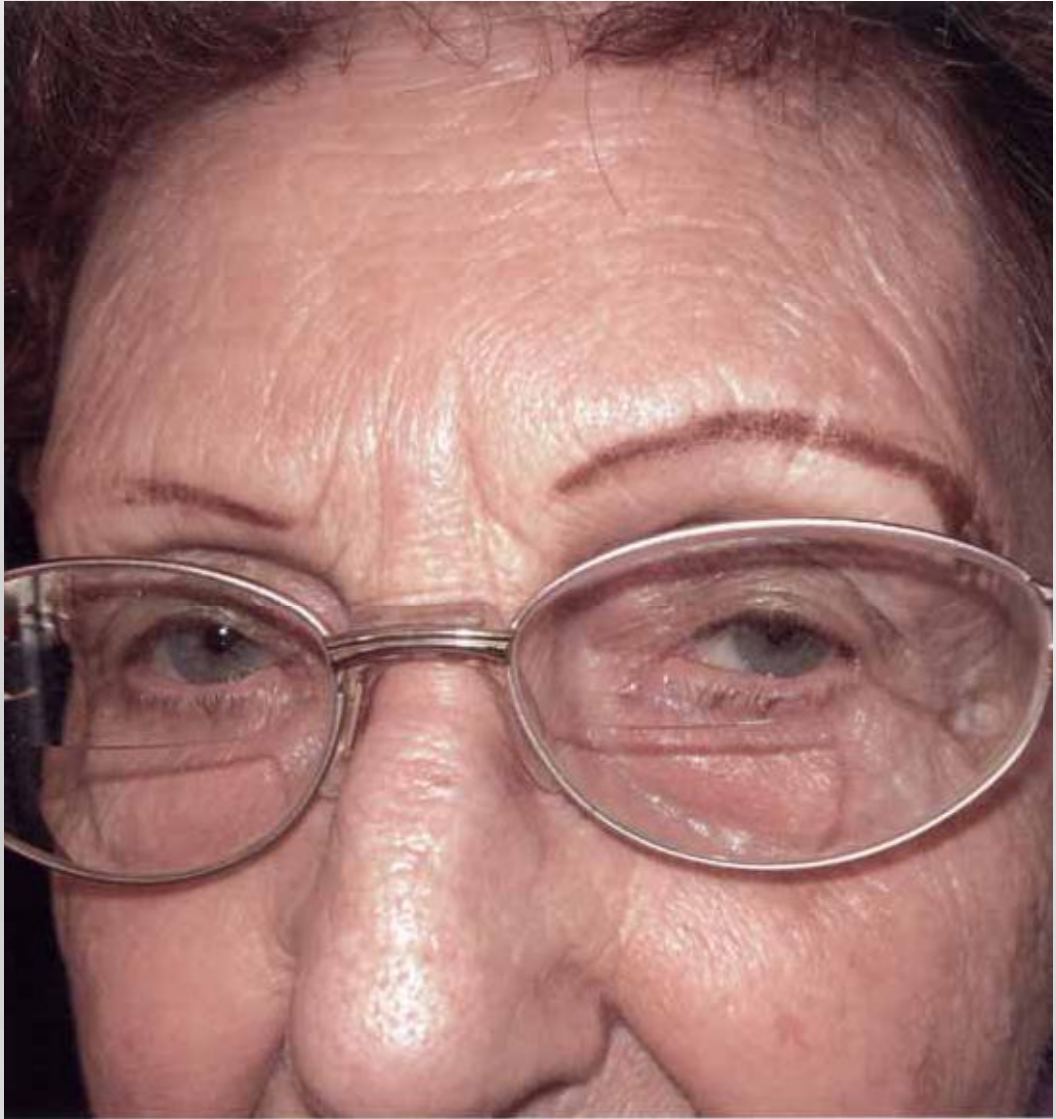
2. HEALTH

Australians know that, with age, they will increasingly rely on public health services. And they are highly concerned.

47% are highly concerned that more and more people seem to be diagnosed with cancer.

And there is a new scourge of the aged, with 43% of Australians highly concerned that there is no discovered cure for Alzheimer's.





"My eyes aren't what they use to be and I still have to put my eyebrows on."

Female, Dubbo, Retiree

AGEING, HEALTH & WELLBEING

While these dread diseases are seen to be on the rise, Aussies don't have faith in our healthcare infrastructure:

48% are highly concerned about the poor quality of public health care in Australia.

43% are highly concerned about the terrible state of care provided by public hospitals.

"I am getting older and would like to be well looked after, since I paid my taxes for 40 years and am now owed something in return."

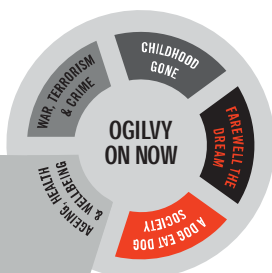
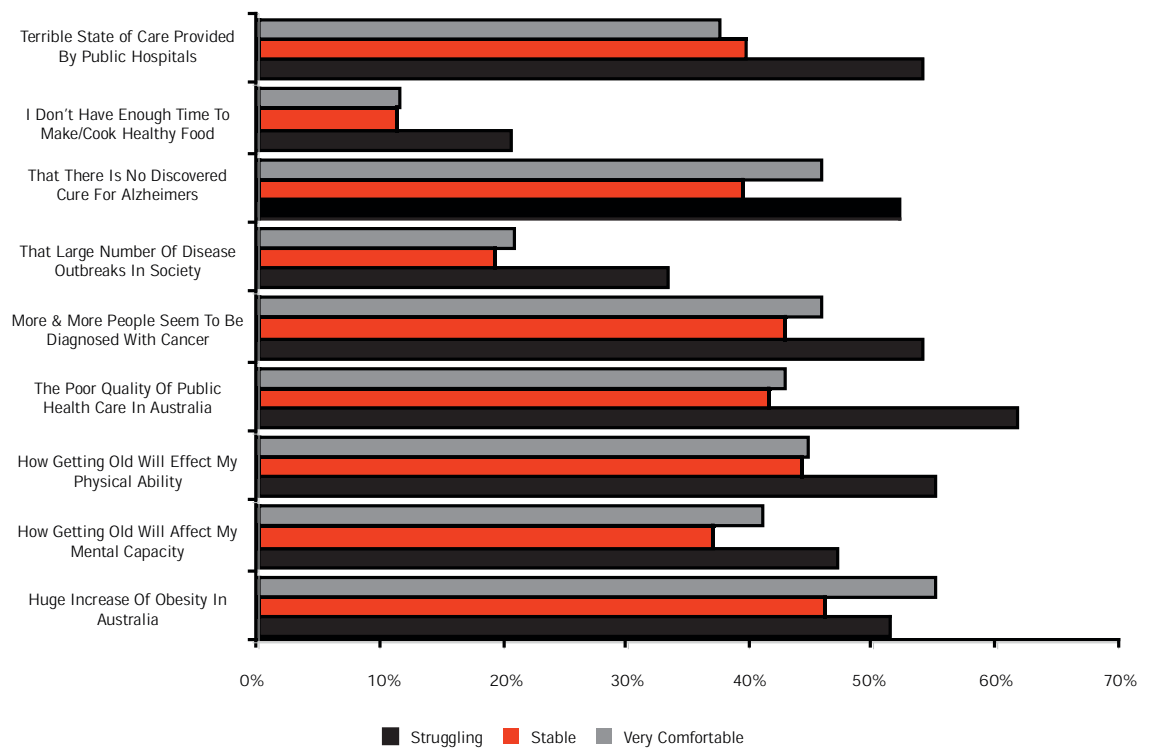
"Service takes too long."



AGEING, HEALTH & WELLBEING

And Aussies struggling financially are more concerned about health issues than other financial groups, probably because they rely more on public healthcare.

% Aussies highly concerned about...





"Health. Am I doing enough?"

Female, Sydney, Single

AGEING, HEALTH & WELLBEING

A whopping 70% of Aussies struggling financially feel they have very little to no control over the poor quality of public health care (ave is 59%).

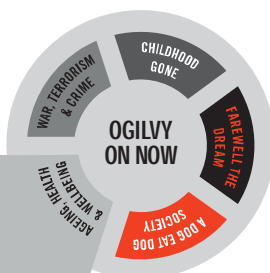
"I feel totally helpless. If I ditch our current GP, all the others are foreign and only stay a short while. It is really scary as you get older."

Financially struggling

"What can I do besides try and vote for the right party?"

Financially struggling

Aussies who rely on public healthcare feel it is buckling, and government is unable, or unwilling, to solve the problem.



**All patients are
charged a \$30
co-payment
prior to your
consultation
with a doctor.**

"Fees. All raised at once. What's the conclusion?"

Male, Sydney, Established Family

AGEING, HEALTH & WELLBEING

3. WELLBEING

45% of Australians are really concerned that they don't get enough exercise. However, it is a major concern over which they feel they have a lot of control.

"I just need the discipline to make the time with a young family and hectic work load."

"It's up to me to manage my time better and make the effort. I can't blame anyone else."

They feel they have the control to exercise, but don't have control over their lifestyles. Time pressure, tiredness and laziness stop them getting out of their ruts.





"Exercise plays a big part in my life and it concerns me when I cannot exercise or feel I'm not working at my best."

Female, Melbourne, Student

MEGA THEME C: CHILDHOOD GONE



CHILDHOOD GONE

Australia's 4th greatest concern is around its children. 60% are highly concerned that kids are exposed to things prematurely via the Internet and TV.

"Children are more antisocial and aggressive after being exposed to a lot of stuff on TV and the Internet."

"It robs them of a normal childhood."

"People have forgotten to do other things, like have conversation at the dinner table, interact with games, read, do a hobby, etc."

Australians are concerned that today's TV and Internet content not only robs children of their innocence, it makes them socially inept, and might also contribute to anti-social behaviour.



CHILDHOOD GONE

Interestingly, younger Aussies feel they have less control over this concern than those aged 30 to 59 yrs.

"You may think you have some control over these things in your own home, but then there is school, friends' houses, the library, phones and more places they can see these things." 18-24 yrs

And this age group is certainly not anti-censorship! When they think about having kids one day, they are quite conservative.

"I know I'll be censoring the things I let my children become exposed to, wherever possible." 18-24 yrs



MEGA THEME D: WAR, TERRORISM & CRIME



WAR, TERRORISM AND CRIME

Australians are also highly concerned with war and terrorism. 48% say they are highly concerned with the wars taking place all over the world that never stop. And 47% are highly concerned with the negative effect of terrorism on the world.

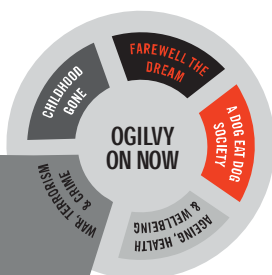
“Most wars are religiously motivated.”

“I can’t go anywhere safely.”

“I am afraid that the wars will come to Australia one day.”

Many Australians believe wars are caused by religion, and this is the main reason they will endure forever.

Is cultural intolerance becoming entrenched in Australia? Will it doom us to enduring cultural divisions that will make our greatest fears come true?



WAR, TERRORISM AND CRIME

37% of Aussies are highly concerned about walking alone at night, and feel unsafe.
And 31% are highly concerned they will be a victim of identity theft as a result of making online purchases.

It is perhaps telling that 10% more Aussies are highly concerned about all the wars in the world than their highest concern about crime.

In short, more Aussies are concerned with foreign wars than they are with the crime in their backyards.





"Safety. Rising street violence. Will I be safe at night?."

Female, Melbourne, Student

NO NEW late-night bars or pubs will be allowed to open in inner Melbourne until at least 2012, as the State Government attempts to curb drunken violence on city streets.

The move comes after another weekend of violence in the central business district, in which a police sergeant had his jaw and an eye socket fractured after being struck from behind, and a woman was stabbed in the stomach and had her face slashed from below her mouth to behind her ear.

Consumer Affairs Minister

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"There is so much violence."

Female, Melbourne, Student



"I worry about my daughter and how she will grow up."

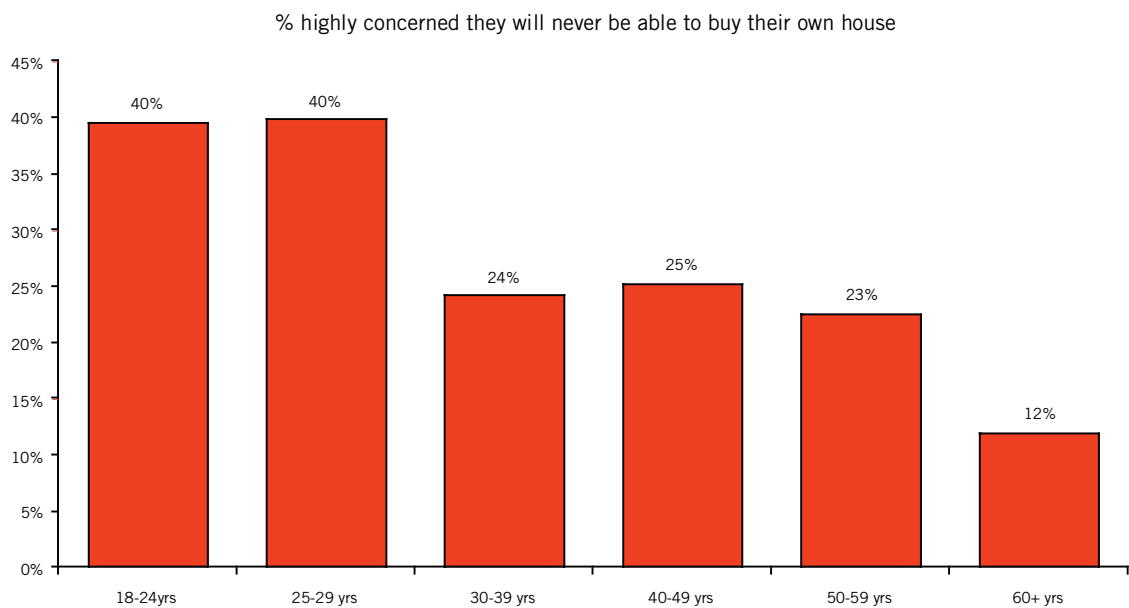
Male, Dubbo, Young Family

MEGA THEME E: FAREWELL TO THE AUSTRALIAN DREAM

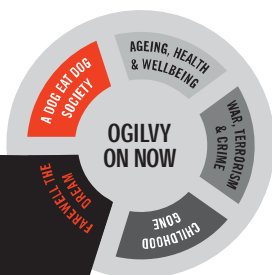


FAREWELL TO THE AUSTRALIAN DREAM

In the last of our mega-themes, we found that Aussies are losing hope for living the Australian dream. With high interest rates, job insecurity, and a poor work/life balance, they feel the lifestyle of decades past is fast disappearing.



40% of younger Aussies doubt they'll ever be able to buy a house – the bedrock of the Australian dream.



FAREWELL TO THE AUSTRALIAN DREAM

Aussie youth feel like they've missed the boat when it comes to property.

"I've been saving for a long time and I feel like I am not getting anywhere."
18-24 yrs

"We just can't earn enough money to pay a house off. So short of winning the lottery we will never own a house." 18-24 yrs

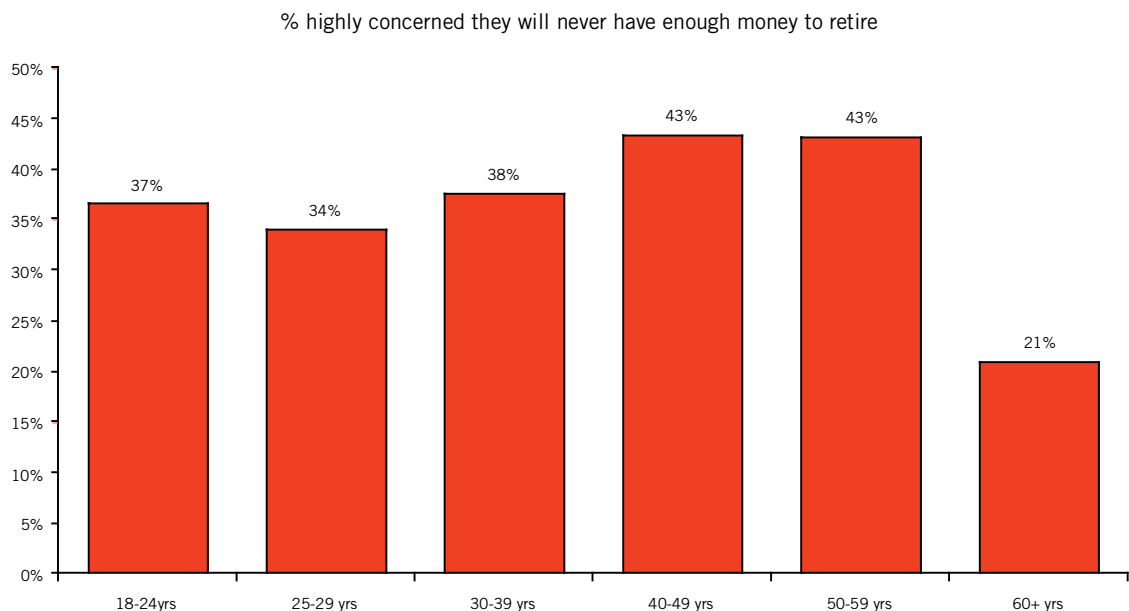
"Rent is ridiculous, but buying a house is too. I feel like I'll never get off the poverty line." 25-29 yrs

"I can't keep up with the expenses of daily living and be able to save enough money quickly enough for a deposit." 25-29 yrs

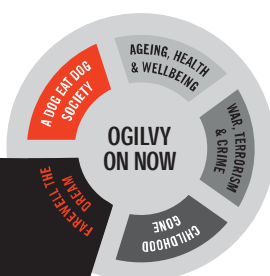


FAREWELL TO THE AUSTRALIAN DREAM

Most age groups feel they will never have enough money for a comfortable retirement. Middle aged Aussies are particularly concerned about this.



"So much of my super has been lost. Prices of everything are always rising. How will I afford to retire?" 40-49 yrs



FAREWELL TO THE AUSTRALIAN DREAM

While the share market crash and a sky-rocketing cost of living are cited by many as the reason for their concern, divorce features prominently, too.

"My family breakdown has taken all my money and, as hard as I work, the costs exceed my earnings." 50-59 yrs

There must be some great opportunities for brands to stand for the guardian of the Australian dream, or help Aussies recapture certain elements of the dream.



DEMOGRAPHIC FOCUS

DEMOGRAPHIC FOCUS

DIFFERENCES IN LEVELS OF CONCERN BY DEMOGRAPHIC

In general, Australians are highly concerned about more things if they fall into any of these groups:

1. Older
2. Female
3. Live in outlying areas
4. Struggling financially

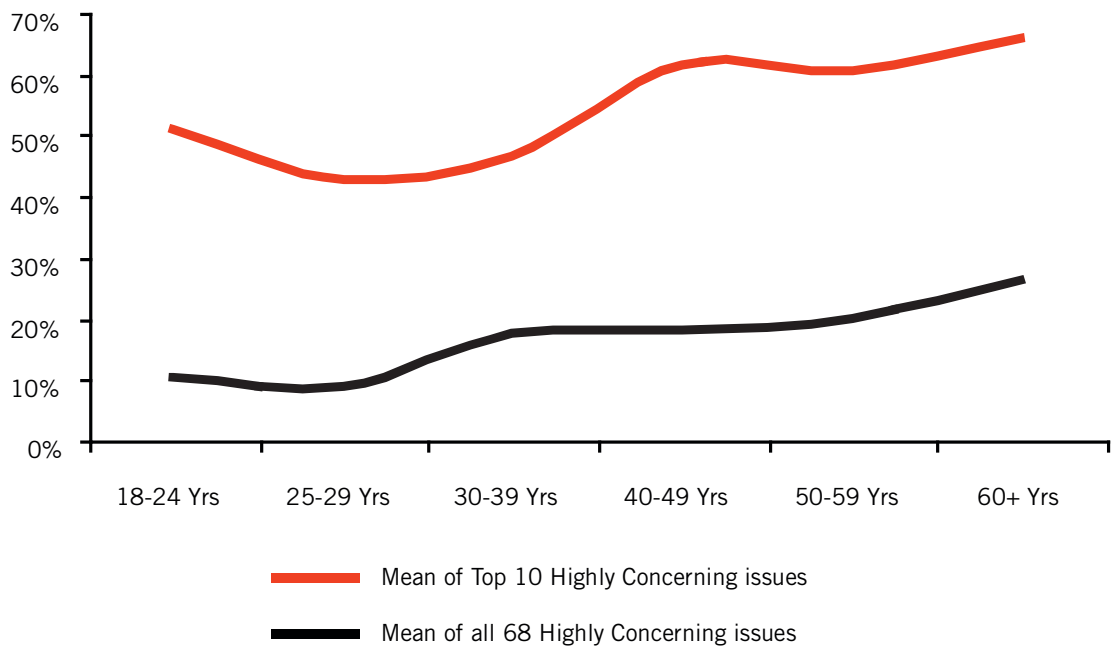


DEMOGRAPHIC FOCUS

1. OLDER AUSTRALIANS ARE MORE CONCERNED ABOUT MORE ISSUES

Older Australians rate more of the Top 10 concerns as highly concerning. Interestingly, Australians aged 18-24 are more concerned than Australians aged 25-29 yrs.

Mean for issues that are 'Highly Concerning', by age group



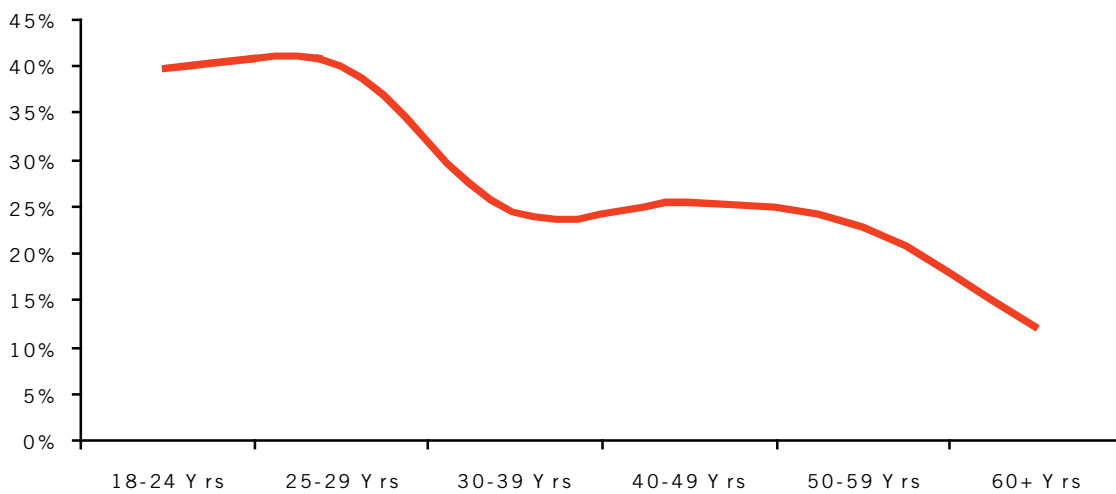
NB: Above is as ranked by 60+ yrs



DEMOGRAPHIC FOCUS

In fact, the only thing in the Top 10 concerns that Australians 18-29 yrs are more concerned about than all other age groups, is ever affording a house.

% Australians highly concerned they will never be able to afford to buy a house

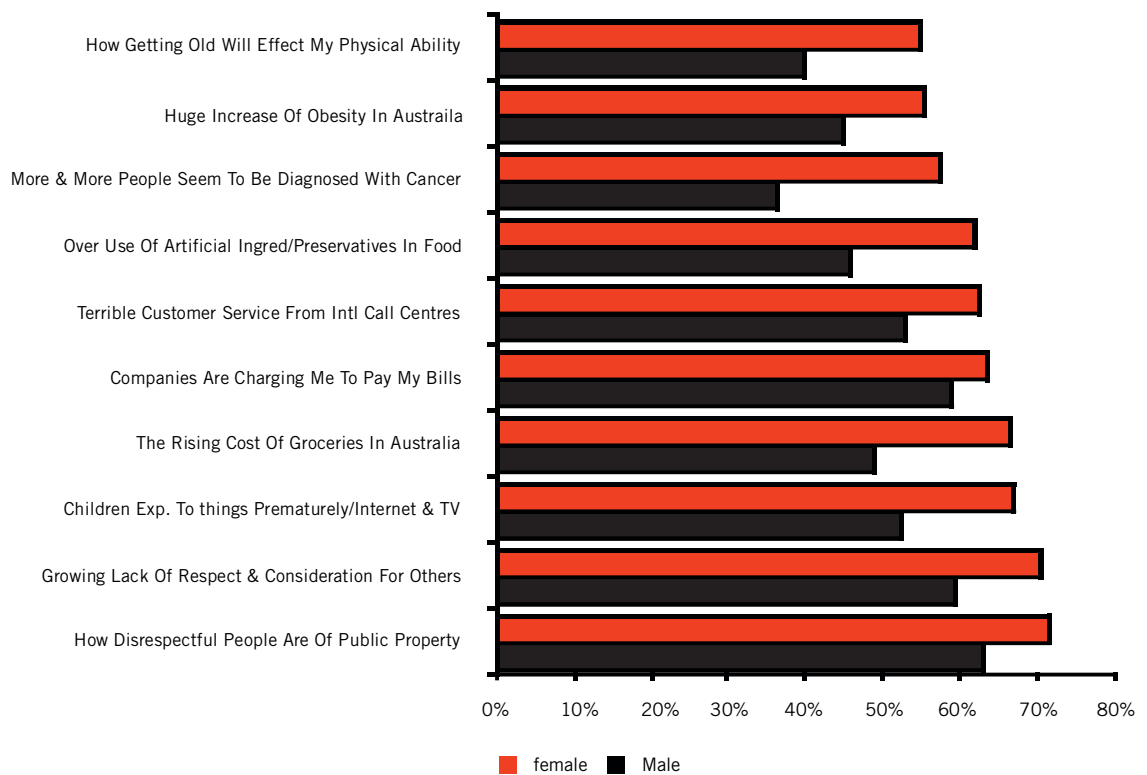


DEMOGRAPHIC FOCUS

2. WOMEN ARE MORE HIGHLY CONCERNED THAN MEN

Aussie men reckon 'She'll be right'. Women are more highly concerned about all of their Top 10 concerns than men.

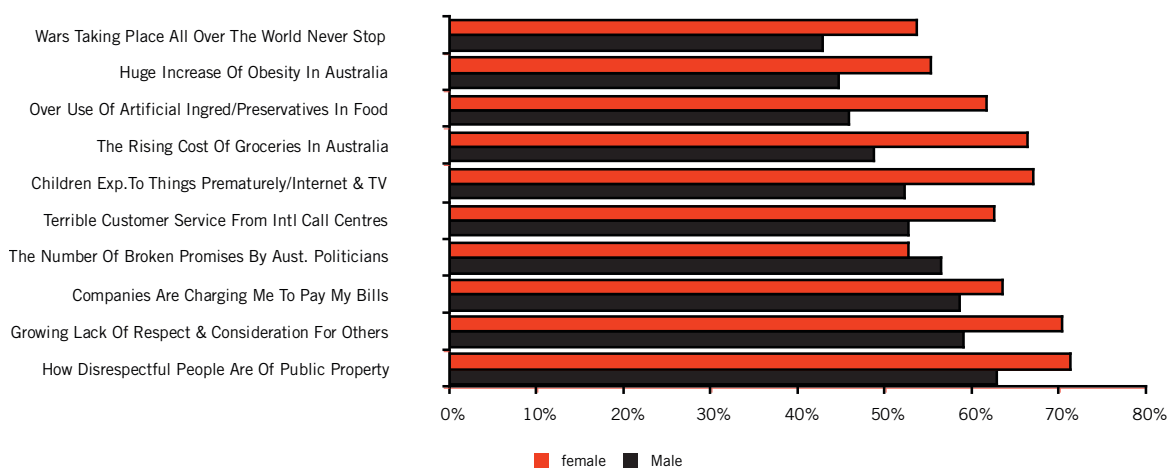
% Aussies highly concerned about Top 10 concerns (ranked by women)



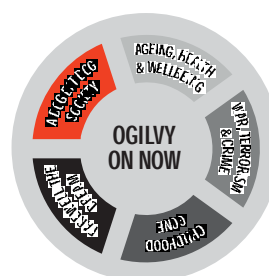
DEMOGRAPHIC FOCUS

There are some differences between men's and women's Top 10 concerns, but regardless, women still feel more highly concerned than men about each and every one – with one exception.

% highly concerned about Top 10 concerns (ranked by men)



Men are only more highly concerned than women over the number of broken promises by politicians.

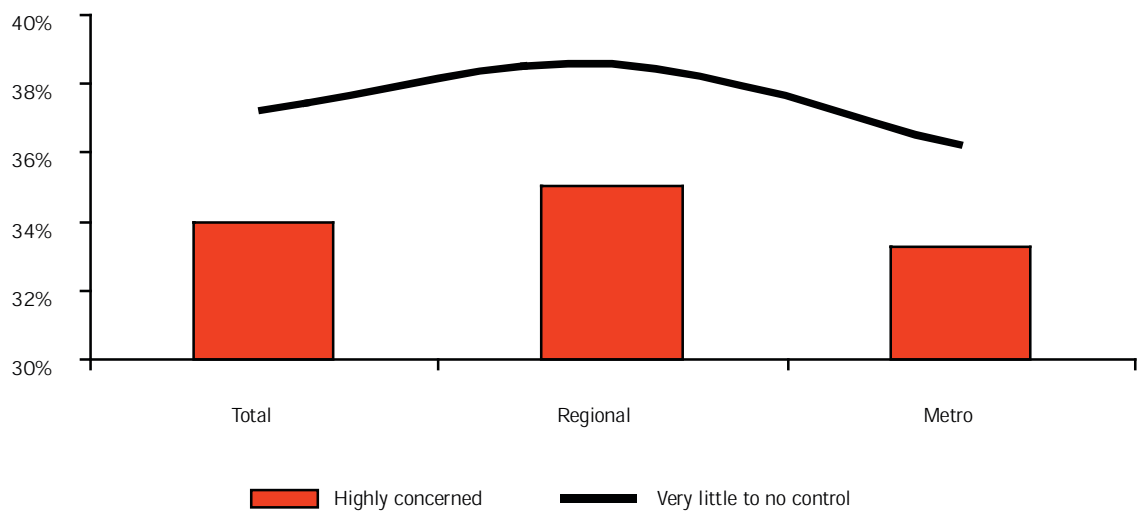


DEMOGRAPHIC FOCUS

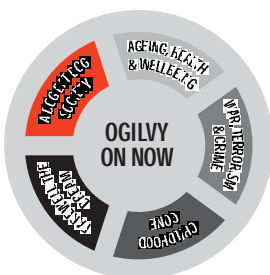
3. REGIONAL AUSSIES ARE MORE HIGHLY CONCERNED

Regional Aussies are more highly concerned across all 68 concerns.

Average of 68 concerns and their control, by regionality



They also feel like they have very little to no control over these concerns, relative to people who live in metro areas.

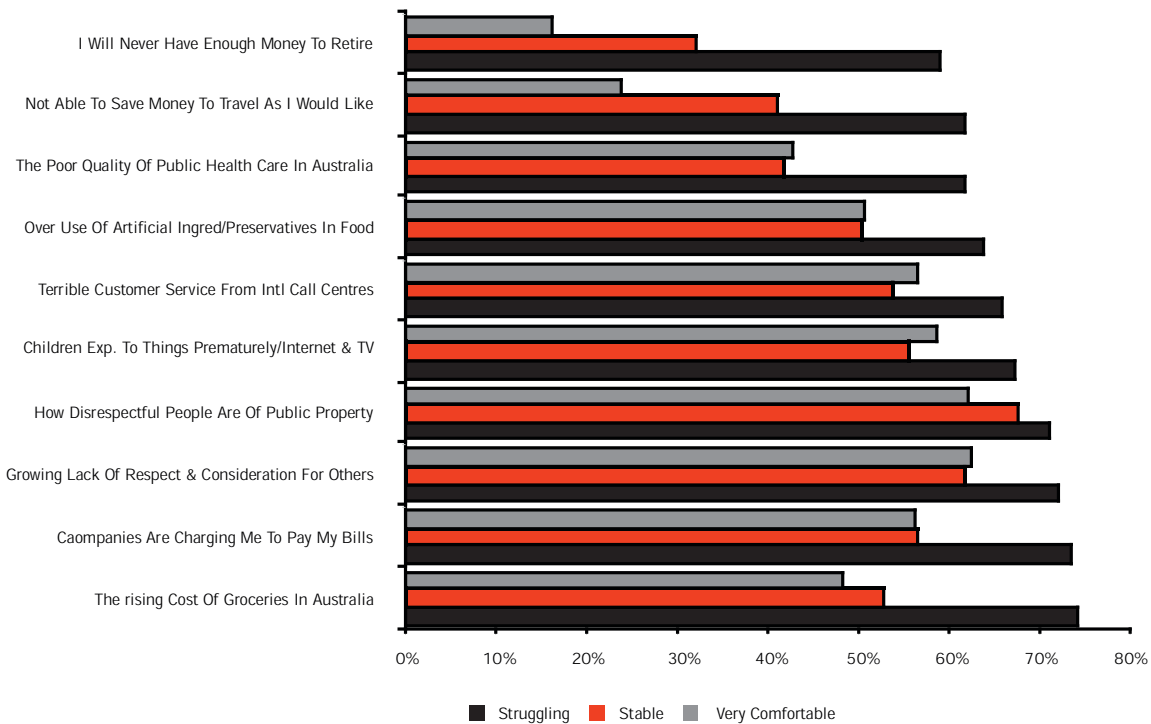


DEMOGRAPHIC FOCUS

4. FINANCIALLY STRUGGLING AUSSIES ARE MORE HIGHLY CONCERNED

It probably isn't surprising, but financial pressure makes Aussies financially struggling more highly concerned about things beyond their bank balance.

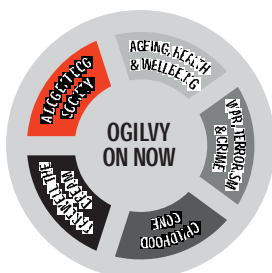
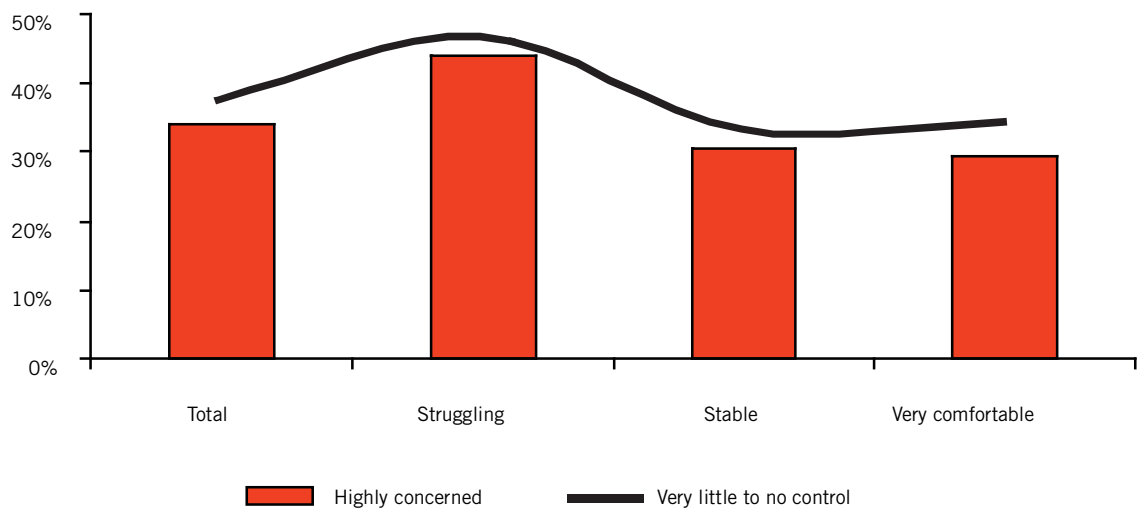
% highly concerned about Top 10 concerns (ranked by financially 'Struggling')



DEMOGRAPHIC FOCUS

Aussies who are financially struggling feel more highly concerned, and less in control of all 68 concerns than Aussies who are stable or very comfortable.

Average of 68 concern and their control, by income category



CONCERN & CONTROL

CONCERN & CONTROL

THE RELATIONSHIP BETWEEN CONCERNS AND CONTROL

We really wanted to understand how much control Aussies felt they had over their major concerns. If we know which concerns they feel most helpless to address, we'll know where brands can make a real difference to their lives.

THE CONCERNS OVER WHICH AUSSIES FEEL THEY HAVE THE *MOST* CONTROL

In general, Aussies feel they have the most control over concerns that exist closest to them, i.e. in their personal relationships and homes.

Sum Issues Concerned About: NETT Control (8/10)		Total
1.	That I Am Not Exercising Nearly Enough	60%
2.	I Don't Have Enough Time To Make/Cook Healthy Food	52%
3.	That I Will Leave It Too Late To Start A Family	39%
4.	I Feel I Have To Try & Fit In With People All The Time	38%
5.	Constantly Feel I Have To Please Other People	38%
6.	Technology Taking Over/Feel Can Never Switch Off	38%
7.	I Will Never Have A Good Work/Life Balance	35%
8.	I Will Never Be Able To Buy My Own House	34%
9.	Not Able To Keep Up With Technological Advancements	34%
10.	My Bills Are Too Complex For Me To Understand	33%



CONCERN & CONTROL

THE CONCERNS OVER WHICH AUSSIES FEEL THEY HAVE THE *LEAST* CONTROL

And Aussies feel they have nearly no control over those issues that exist beyond the boundaries of their personal lives and homes.

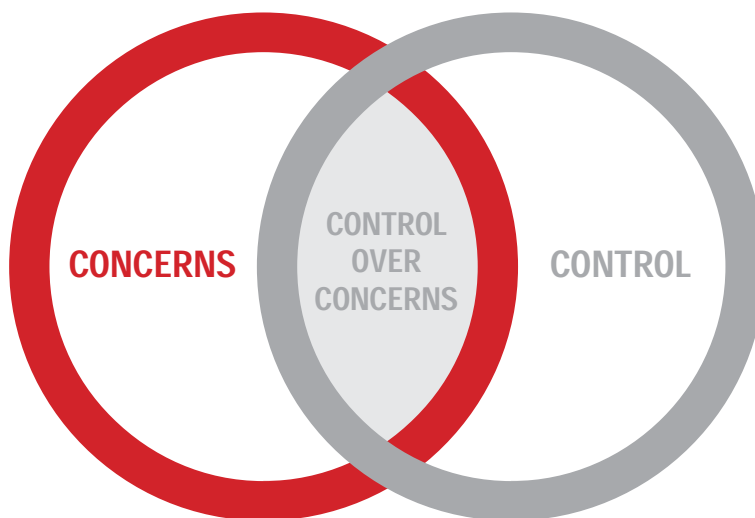
Sum Issues Concerned About: NETT No Control (0/2)		Total
1.	Wars Taking Place All Over The World Never Stop	69%
2.	That There Is No Discovered Cure For Alzheimers	68%
3.	More & More People Seem To Be Diagnosed With Cancer	66%
4.	The Negative Effect Of Terrorism On The World	63%
5.	Large Pharm. Comp Too Much Influence On Government	62%
6.	The Large Number Of Disease Outbreaks In Society	61%
7.	Unreliability Of Public Transport In Australia	60%
8.	Terrible Customer Service From Intl. Call Centres	60%
9.	Run-Down Condition Of Public Transport In Australia	60%
10.	The Negative Effect Of Terrorism On Australia	60%



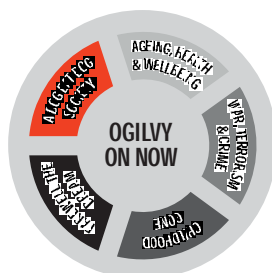
CONCERN & CONTROL

PLOTTING THE RELATIONSHIP BETWEEN CONCERNS AND CONTROL

Ogilvy on Now was designed to help clients either stop Aussies feeling concerned about something, or give them more control over it.

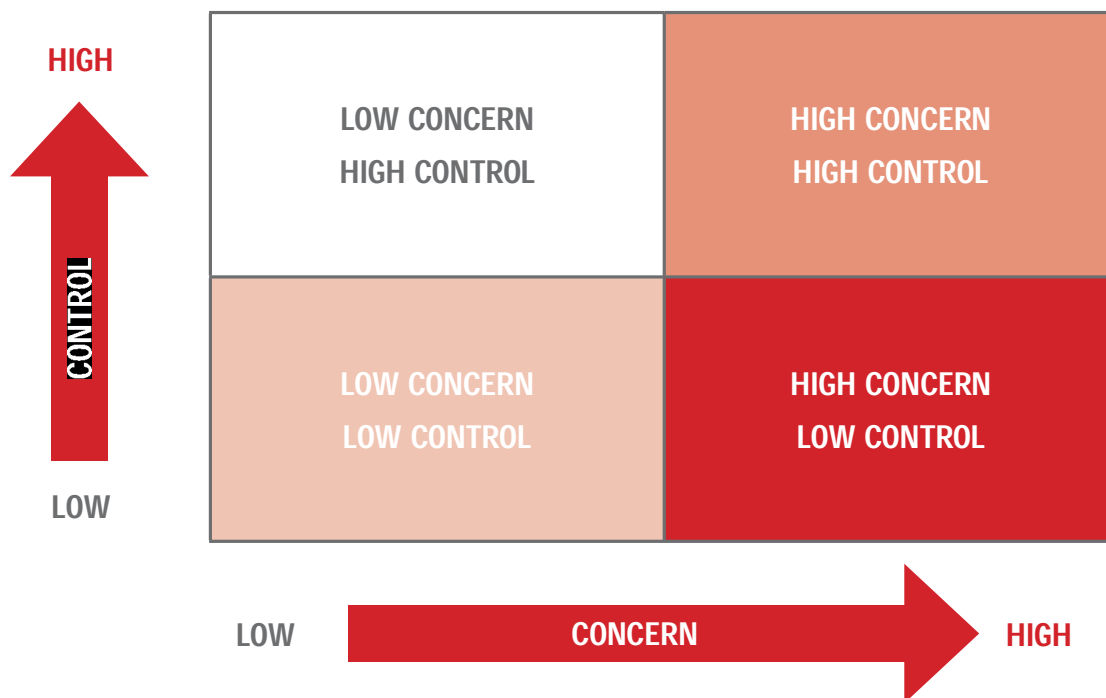


However, this tool is one dimensional – it captures an on/off measure of concern and control. Our data has degrees of concern and control, so we need a different tool.

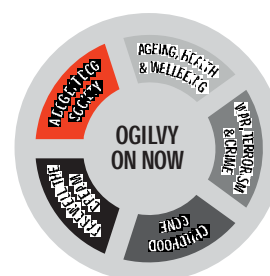


CONCERN & CONTROL

We can plot the degrees of concern and control on a matrix.



Different quadrants represent hot opportunities for brands to make a tangible difference to people.

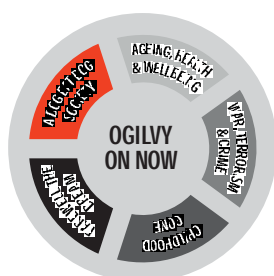
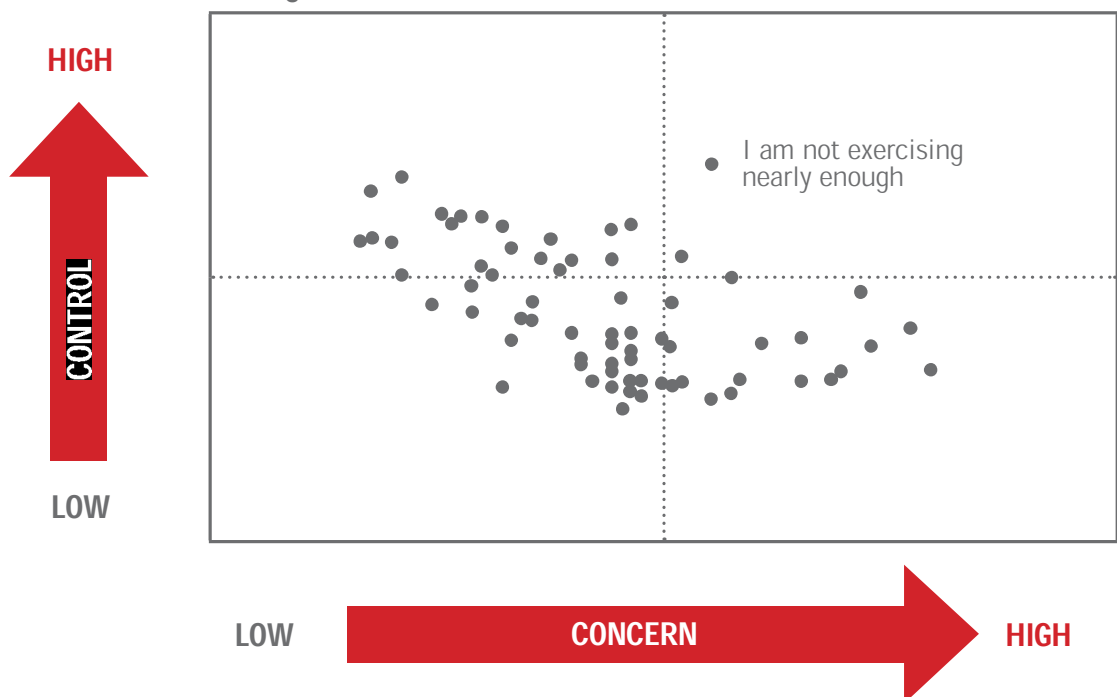


CONCERN & CONTROL

THERE IS AN INVERSE RELATIONSHIP BETWEEN CONCERNS AND CONTROL

In general, the higher the perceived level of control over a concern, the less concerning it is, and vice-versa. *I am not exercising nearly enough* is the primary exception, with perceptions of high concern and high control.

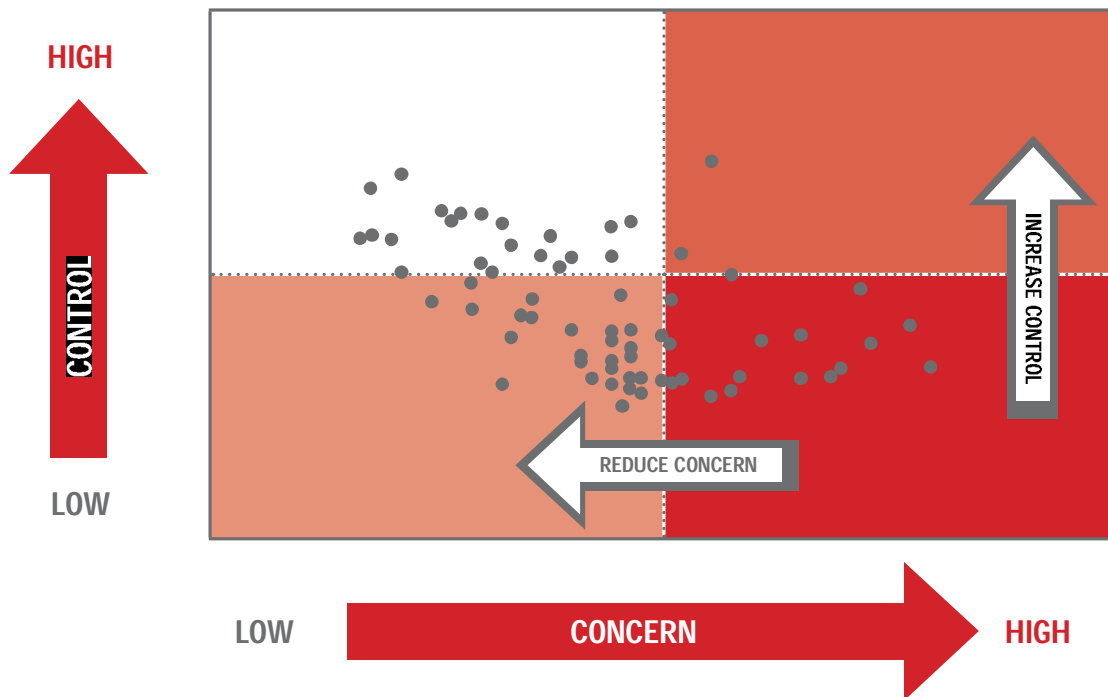
Average measures of concern and control for Australia's 68 concerns



CONCERN & CONTROL

We can see there are opportunities for brands to make a difference to Australian lives. Brands can reduce concern (e.g. by tackling Alzheimer's), or increase control (e.g. greater parental control for monitoring children's TV viewing). The white arrows signify these different strategies, below.

Average measures of concern and control for Australia's 68 concerns



CONCERN & CONTROL

WHEN WE ZOOM IN ON THESE TOP CONCERNS, THERE ARE DEFINITE OPPORTUNITIES FOR BRANDS.

In general, the higher the perceived level of control over a concern, the less concerning it is, and vice-versa. *I am not exercising nearly enough* is the primary exception, with perceptions of high concern and high control.

Sum Issues Concerned About: NETT Agree (8/10)		Total Concern	Total Control
1.	How Disrespectful People Are Of Public Property	67%	7%
2.	Growing Lack Of Respect & Consideration For Others	65%	12%
3.	Companies Are Charging Me To Pay My Bills	61%	12%
4.	Children Exp. To Things Prematurely/Internet & TV	60%	22%
5.	Terrible Customer Service From International Call Centres	58%	10%
6.	The Rising Cost Of Groceries In Australia	57%	6%
7.	The Number Of Broken Promises By Australian Politicians	55%	5%
8.	Over Use Of Artificial Ingrid/Preservatives In Food	54%	14%
9.	Huge Increase Of Obesity In Australia	50%	11%
10.	Wars Taking Place All Over The World Never Stop	48%	4%
11.	The Poor Quality Of Public Health Care In Australia	48%	6%
12.	How Getting Old Will Effect My Physical Ability	47%	20%
13.	The Negative Effect Of Terrorism On The World	47%	5%
14.	More & More People Seem To Be Diagnosed With Cancer	47%	5%
15.	That There Is No Discovered Cure For Alzheimers	45%	5%
16.	That I am Not Exercising Nearly Enough	45%	60%
17.	Terrible State Of Care Provided By Public Hospitals	43%	5%
18.	Not Able To Save Money To Travel As I Would Like	42%	23%
19.	Large Pharm. Companies Too Much Influence On Government	42%	5%
20.	How Getting Old Will Affect My Mental Capacity	41%	15%



There are plenty of opportunities for brands to step in and help out.

FINAL PERSPECTIVES

FINAL PERSPECTIVES

1. WAKING UP FROM THE AUSTRALIAN DREAM

Australians feel they can't trust the people who lead them. And they feel they can't trust the people they buy things from. Is it really surprising that they feel they can't trust anyone anymore? Is it surprising that they feel disempowered and disconnected from everyone around them?

The things that Aussies traditionally value and believe in are under threat: Mateship, a fair go, even buying their own house. It seems that Australians are waking up to the cold reality that today's Australia is markedly different to the Australia they've been dreaming about.

2. WE'RE A LOT MORE SIMILAR THAN WE THINK

We tend to think of Gen Y as inhabiting another planet, but they share far more in common with other generations that we think.

The generation gap in terms of concerns (and hence, values) is getting smaller.

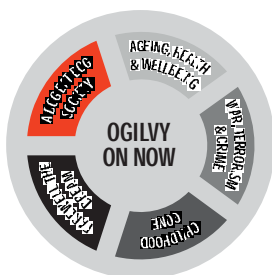
Does it make sense to segment Australians by generation at all?

Is there an opportunity for a brand to show all Aussies that they are far more alike when it comes to their concerns than is commonly believed? Could this foster trust, respect and understanding between young and old?

3. TO EARN RESPECT, TREAT OTHERS WITH RESPECT

Aussies are fed up with the lack of mutual care and respect in society. What better way for a brand to stand out and win respect, than by setting an example in how it shows respect to others?

Customer service and CSR initiatives could remind Aussies the true nature of respect again.



FINAL PERSPECTIVE

4. OLDER PEOPLE NEED MORE HELP

Whatever happened to grey marketing? Australia has an ageing population, yet we spend far more time talking to youngsters.

Few brands are actively targeting the older demographics, who are more concerned about more things.

Surely there must be a wealth of opportunities in this?

5. ARE MEN NOT CARRYING THEIR FAIR SHARE OF CONCERNS?

Are women more concerned about more things than men because men adopt a 'She'll be right' attitude, and just let things fall into place? Do women feel someone has to take control of these concerns, and it won't be the men?

We say Australians are laid back. Certainly, our men are. But could we describe our women the same way?



FINAL PERSPECTIVES

6. THE DUAL CURRENCIES OF MONEY AND TIME

We believe we don't have a good life/work balance, and this is part of the reason that we have no time for each other.

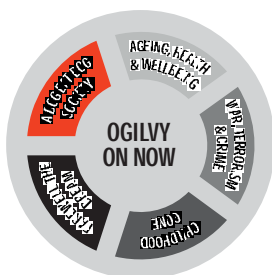
Time has become such a precious commodity that we won't squander it on strangers.

In effect, we now have two currencies: money and time. In the past, money was worth a lot more to us than time. That's all changed, and many of us would willingly sacrifice the currency of money for the currency of time.

7. A NEW CLASS SOCIETY

It's harder and harder for young Aussies to get into the property market. Will this see them financially marginalised forever, as the 'Have-not properties'?

If so, how will this affect the other ways they try to invest?



SCHEDULE

The daily schedule is very overburdening. The daily schedule is very overburdening.
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"Being overburdened. Not having enough time to spend with family and friends. Not having enough time to enjoy life."

Female, Melbourne, Student

CHAT TO US ABOUT HOW YOUR BRANDS CAN HELP AUSTRALIA SLEEP WELL AT NIGHT

MIKE DANIELS

HEAD OF STRATEGY & MANAGING PARTNER

MIKE.DANIELS@OGILVY.COM.AU

(02) 9373 6333

APPENDIX

Sum Issues Concerned About: NETT Agree (8/10)		Total	18-24 Yrs	25-29 Yrs	30-39 Yrs	40-49 Yrs	50-59 Yrs	60+ Yrs
1.	The Rising Cost Of Groceries In Australia	57%	59%	52%	51%	56%	62%	60%
2.	Children Exp. To Things Prematurely/Internet & TV	60%	56%	46%	54%	62%	55%	70%
3.	Huge Increase Of Obesity In Australia	50%	55%	34%	40%	50%	50%	60%
4.	Not Able To Save Money To Travel As I Would Like	42%	55%	44%	42%	43%	38%	39%
5.	Growing Lack Of Respect & Consideration For Others	65%	54%	50%	57%	76%	65%	70%
6.	How Disrespectful People Are Of Public Property	67%	54%	50%	58%	73%	72%	76%
7.	That I am Not Exercising Nearly Enough	45%	52%	46%	43%	42%	44%	45%
8.	Terrible Customer Service From International Call Centres	58%	52%	39%	52%	63%	61%	64%
9.	More & More People Seem To Be Diagnosed With Cancer	47%	48%	34%	39%	50%	45%	56%
10.	So Expensive To Buy Healthy Food/Don't Buy Enough	28%	47%	39%	20%	35%	23%	24%
11.	Companies Are Charging Me To Pay My Bills	61%	47%	43%	51%	73%	70%	64%
12.	The Pressure To Perform At School/Uni/TAFE/College	23%	47%	26%	20%	20%	18%	20%
13.	The Negative Effect Of Terrorism On The World	47%	47%	31%	34%	47%	52%	57%
14.	Wars Taking Place All Over The World Never Stop	48%	47%	35%	36%	58%	44%	57%
15.	Don't Know If I Will Ever Find The Right Job For Me	19%	46%	26%	24%	23%	16%	3%
16.	Climate Change Huge Negative Impact On The Furure	37%	46%	34%	33%	45%	38%	32%
17.	The Poor Quality Of Public Health Care In Australia	48%	45%	33%	42%	50%	55%	51%
18.	The Number Of Broken Promises By Australian Politicians	55%	45%	34%	36%	57%	65%	67%
19.	Unreliability Of Public Transport In Australia	35%	43%	21%	26%	37%	38%	39%
20.	Over Use Of Artificial Ingred/Preservatives In Food	54%	43%	49%	42%	57%	59%	61%

APPENDIX

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3.	Growing Lack Of Respect & Consideration For Others	65%	54%	50%	57%	76%	65%	70%
4.	Over Use Of Artificial Ingrid/Preservatives In Food	54%	43%	49%	42%	57%	59%	61%
5.	Children Exp.To Things Prematurely/Internet & TV	60%	56%	46%	54%	62%	55%	70%
6.	That I Am Not Exercising Nearly Enough	45%	52%	46%	43%	42%	44%	45%
7.	Not Able To Save Money To Travel As I Would Like	42%	55%	44%	42%	43%	38%	39%
8.	Companies Are Charging Me To Pay My Bills	61%	47%	43%	51%	73%	70%	64%
9.	Children Getting Teased At School	40%	42%	40%	31%	41%	38%	46%
10.	I Will Never Be Able To Buy My Own House	24%	40%	40%	24%	25%	23%	12%
11.	Terrible Customer Service From Intl Call Centres	58%	52%	39%	52%	63%	61%	64%
12.	So Expensive To Buy Healthy Food/Don't Buy Enough	28%	47%	39%	20%	35%	23%	24%
13.	Traffic/Impact On How Long Takes To Get To Work	39%	43%	36%	33%	42%	42%	38%
14.	Wars Taking Place All Over The World Never Stop	48%	47%	35%	36%	58%	44%	57%
15.	The Number Of Broken Promises By Aust. Politicians	55%	45%	34%	36%	57%	65%	67%
16.	Huge Increase Of Obesity In Australia	50%	55%	34%	40%	50%	50%	60%
17.	More & More People Seem To Be Diagnosed With Cancer	47%	48%	34%	39%	50%	45%	56%
18.	Climate Change Huge Negative Impact On The Future	37%	46%	34%	33%	45%	38%	32%
19.	I Will Never Have Enough Money To Retire	35%	37%	34%	38%	43%	43%	21%
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7.	That I am Not Exercising Nearly Enough	45%	52%	46%	43%	42%	44%	45%
8.	The Poor Quality Of Public Health Care In Australia	48%	45%	33%	42%	50%	55%	51%
9.	Not Able To Save Money To Travel As I Would Like	42%	55%	44%	42%	43%	38%	39%
10.	Over Use Of Artificial Ingrid/Preservatives In Food	54%	43%	49%	42%	57%	59%	61%
11.	Huge Increase Of Obesity In Australia	50%	55%	34%	40%	50%	50%	60%
12.	More & More People Seem To Be Diagnosed With Cancer	47%	48%	34%	39%	50%	45%	56%
13.	How Getting Old Will Effect My Physical Ability	47%	37%	28%	39%	53%	52%	56%
14.	Terrible State Of Care Provided By Public Hospitals	43%	40%	26%	38%	50%	48%	46%
15.	I Will Never Have Enough Money To Retire	35%	37%	34%	38%	43%	43%	21%
16.	Wars Taking Place All Over The World Never Stop	48%	47%	35%	36%	58%	44%	57%
17.	The Number Of Broken Promises By Aust. Politicians	55%	45%	34%	36%	57%	65%	67%
18.	The Negative Effect Of Terrorism On The World	47%	47%	31%	34%	47%	52%	57%
19.	Care For My Aging Parents	29%	35%	25%	34%	37%	31%	18%
20.	Climate Change Huge Negative Impact On The Future	37%	46%	34%	33%	45%	38%	32%

APPENDIX

Sum Issues Concerned About: NETT Agree (8/10)		Total	18-24 Yrs	25-29 Yrs	30-39 Yrs	40-49 Yrs	50-59 Yrs	60+ Yrs
1.	Growing Lack Of Respect & Consideration For Others	65%	54%	50%	57%	76%	65%	70%
2.	How Disrespectful People Are Of Public Property	67%	54%	50%	58%	73%	72%	76%
3.	Companies Are Charging Me To Pay My Bills	61%	47%	43%	51%	73%	70%	64%
4.	Terrible Customer Service From Intl Call Centres	58%	52%	39%	52%	63%	61%	64%
5.	Children Exp.To Things Prematurely/Internet & TV	60%	56%	46%	54%	62%	55%	70%
6.	Wars Taking Place All Over The World Never Stop	48%	47%	35%	36%	58%	44%	57%
7.	Over Use Of Artificial Inged/Preservatives In Food	54%	43%	49%	42%	57%	59%	61%
8.	The Number Of Broken Promises By Aust. Politicians	55%	45%	34%	36%	57%	65%	67%
9.	The Rising Cost Of Groceries In Australia	57%	59%	52%	51%	56%	62%	60%
10.	How Getting Old Will Effect My Physical Ability	47%	37%	28%	39%	53%	52%	56%
11.	Huge Increase Of Obesity In Australia	50%	55%	34%	40%	50%	50%	60%
12.	Terrible State Of Care Provided By Public Hospitals	43%	40%	26%	38%	50%	48%	46%
13.	The Poor Quality Of Public Health Care In Australia	48%	45%	33%	42%	50%	55%	51%
14.	More & More People Seem To Be Diagnosed With Cancer	47%	48%	34%	39%	50%	45%	56%
15.	The Negative Effect Of Terrorism On The World	47%	47%	31%	34%	47%	52%	57%
16.	How Getting Old Will Affect My Mental Capacity	41%	40%	31%	28%	47%	44%	46%
17.	That There Is No Discovered Cure For Alzheimers	45%	43%	30%	23%	47%	45%	63%
18.	Effect Of The Aging Population On Public Services	41%	39%	30%	29%	46%	42%	48%
19.	Wait For Elective Proc. So Long No Point Trying	37%	34%	23%	25%	46%	42%	41%
20.	Climate Change Huge Negative Impact On The Future	37%	46%	34%	33%	45%	38%	32%

APPENDIX

Sum Issues Concerned About: NETT Agree (8/10)		Total	18-24 Yrs	25-29 Yrs	30-39 Yrs	40-49 Yrs	50-59 Yrs	60+ Yrs
1.	How Disrespectful People Are Of Public Property	67%	54%	50%	58%	73%	72%	76%
2.	Companies Are Charging Me To Pay My Bills	61%	47%	43%	51%	73%	70%	64%
3.	Growing Lack Of Respect & Consideration For Others	65%	54%	50%	57%	76%	65%	70%
4.	The Number Of Broken Promises By Aust. Politicians	55%	45%	34%	36%	57%	65%	67%
5.	The Rising Cost Of Groceries In Australia	57%	59%	52%	51%	56%	62%	60%
6.	Terrible Customer Service From Intl Call Centres	58%	52%	39%	52%	63%	61%	64%
7.	Over Use Of Artificial Inged/Preservatives In Food	54%	43%	49%	42%	57%	59%	61%
8.	Children Exp.To Things Prematurely/Internet & TV	60%	56%	46%	54%	62%	55%	70%
9.	The Poor Quality Of Public Health Care In Australia	48%	45%	33%	42%	50%	55%	51%
10.	How Getting Old Will Effect My Physical Ability	47%	37%	28%	39%	53%	52%	56%
11.	The Negative Effect Of Terrorism On The World	50%	55%	34%	40%	50%	50%	60%
12.	Huge Increase Of Obesity In Australia	47%	48%	34%	39%	50%	45%	56%
13.	Large Pharm. Comp Too Much Influence On Government	42%	32%	23%	29%	43%	49%	53%
14.	Terrible State Of Care Provided By Public Hospitals	43%	40%	26%	38%	50%	48%	46%
15.	That There Is No Discovered Cure For Alzheimers	45%	43%	30%	23%	47%	45%	63%
16.	The Corruption Of State/Local Government	37%	27%	18%	26%	40%	45%	48%
17.	More & More People Seem To Be Diagnosed With Cancer	47%	48%	34%	39%	50%	45%	56%
18.	Wars Taking Place All Over The World Never Stop	48%	47%	35%	36%	58%	44%	57%
19.	Severe Lack Of Public Transport In Australia	40%	40%	22%	31%	43%	44%	46%
20.	That I Am Not Exercising Nearly Enough	45%	52%	46%	43%	42%	44%	45%

APPENDIX

Sum Issues Concerned About: NETT Agree (8/10)		Total	18-24 Yrs	25-29 Yrs	30-39 Yrs	40-49 Yrs	50-59 Yrs	60+ Yrs
1.	How Disrespectful People Are Of Public Property	67%	54%	50%	58%	73%	62%	76%
2.	Growing Lack Of Respect & Consideration For Others	65%	54%	50%	57%	76%	65%	70%
3.	Children Exp.To Things Prematurely/Internet & TV	60%	56%	46%	54%	62%	55%	70%
4.	The Number Of Broken Promises By Aust. Politicians	55%	45%	34%	36%	57%	65%	67%
5.	Companies Are Charging Me To Pay My Bills	61%	47%	43%	51%	73%	70%	64%
6.	Terrible Customer Service From Intl Call Centres	58%	52%	39%	52%	63%	61%	64%
7.	That There Is No Discovered Cure For Alzheimers	45%	43%	30%	23%	47%	45%	63%
8.	Over Use Of Artificial Inged/Preservatives In Food	54%	43%	49%	42%	57%	59%	61%
9.	The Rising Cost Of Groceries In Australia	57%	59%	52%	51%	56%	62%	60%
10.	Huge Increase Of Obesity In Australia	50%	55%	34%	40%	50%	50%	60%
11.	The Negative Effect Of Terrorism On The World	47%	47%	31%	34%	47%	52%	57%
12.	Wars Taking Place All Over The World Never Stop	48%	47%	35%	36%	58%	44%	57%
13.	How Getting Old Will Effect My Physical Ability	47%	37%	28%	39%	53%	52%	56%
14.	More & More People Seem To Be Diagnosed With Cancer	47%	48%	34%	39%	50%	45%	56%
15.	Large Pharm. Comp Too Much Influence On Government	42%	32%	23%	29%	43%	49%	53%
16.	The Poor Quality Of Public Health Care In Australia	48%	45%	33%	42%	50%	55%	51%
17.	How Getting Old Will Affect My Mental Capacity	41%	40%	31%	28%	47%	44%	46%
18.	Terrible State Of Care Provided By Public Hospitals	43%	40%	26%	38%	50%	48%	46%
19.	That I Am Not Exercising Nearly Enough	45%	52%	46%	43%	42%	44%	45%
20.	Not Able To Save Money To Travel As I Would Like	42%	55%	44%	42%	43%	38%	39%

METHODOLOGY: QUALITATIVE

The project began with 12 focus groups, spread throughout Australia, covering off different demographic bases.

We included a pre-focus group photographic exercise:

Participants were given a disposable camera, instructed to photograph anything (objects, people, situations) that causes them frustration, concern or anxiety on day to day basis.

Participants brought their developed photos with explanations to the groups. The photographs provided stimulus for one of the exercises conducted in the focus groups and were analysed after the groups were concluded.

Selected photographs were chosen to compose an exhibition of "What is worrying Australians today?"

Sample: Identical participants as in stage 1 (84 Australians in Sydney, Melbourne, regional NSW and regional VIC); totalling approximately 2,520 photographs.

METHODOLOGY: QUALITATIVE

	Qualitative Groups			
Location	Sydney	Melbourne	Regional NSW	Regional Victoria
Group 1		Students/first jobbers 18-24, mixed gender		
Group 2	Students/first jobbers 18-24, mixed gender			
Group 3				Students/first jobbers 18-24, mixed gender
Group 4		Young families 28-35, female only		
Group 5			Young families 28-35, male only	
Group 6	Established families 35-50, male only			
Group 7				Established families 35-50, female only
Group 8		Empty nesters 45-60, male only		
Group 9			Empty nesters 45-60, female only	
Group 10	Transition to retirement 55-69, female only			
Group 11				Transition to retirement 55-69, male only
Group 12			Retirees 70+, mixed gender	

METHODOLOGY: QUALITATIVE

The objective of the qualitative work was to discover what kept Australians up at night. We identified 68 concerns or worries in the focus groups.

The purpose of the quantitative work was to discover how these 68 concerns featured in the lives of greater Australia, and how much perceived control Australians had over these concerns.

We used 1,000 people in our online sample that was representative of Australians, using the following criteria:

1. State and region (city vs. regional)
2. Age
3. Gender
4. Income bracket
5. Cultural background (first generation Australian, second generation Australian and third (or more) generation Australian)
6. Educational background (Completed Year 10, Completed High school, Completed Tertiary degree)

METHODOLOGY: QUALITATIVE

SECTION 1: Basic Demographics

Q1. Where do you live? (Please select one answer)

Sydney and its surrounding suburbs

Regional / country NSW

Brisbane and its surrounding suburbs

Regional / country QLD

Adelaide and its surrounding suburbs

Regional /country SA

Hobart and its surrounding suburbs

Regional /country TAS

Perth and its surrounding suburbs

Regional / country WA

Alice Springs and its surrounding suburbs

Regional / country NT

ACT

Q2. What is your gender? (Please select one answer)

Male

Female

Q3. What is your age? (Please select one answer)

Under 18

18 to 24

25 to 29

30 to 39

40 to 49

50 to 59

60 years +

METHODOLOGY: QUALITATIVE

SECTION 2: Concern – ranking and rating

Q4. Please indicate to what extent to you agree or disagree with the list of concerns below:

(Where 0= Strongly Disagree and 10= Strongly Agree)

Issue (Randomize)	Not at all Concerned 0	1	2	3	4	5	6	7	8	9	Extremely Concerned 10	Can't Say
1	0	1	2	3	4	5	6	7	8	9	10	99
2	0	1	2	3	4	5	6	7	8	9	10	99
3	0	1	2	3	4	5	6	7	8	9	10	99
4	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
68	0	1	2	3	4	5	6	7	8	9	10	99

METHODOLOGY: QUALITATIVE

SECTION 2: Control – ranking and rating

Q5. Thinking about these issues again, please indicate the degree of control you feel you have over the list of statements below:

(Where 0= No Control and 10= Complete Control)

Issue (Randomize)	No control at all 0	1	2	3	4	5	6	7	8	9	Complete control 10	Can't Say
1	0	1	2	3	4	5	6	7	8	9	10	99
2	0	1	2	3	4	5	6	7	8	9	10	99
3	0	1	2	3	4	5	6	7	8	9	10	99
4	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
.	0	1	2	3	4	5	6	7	8	9	10	99
68	0	1	2	3	4	5	6	7	8	9	10	99

METHODOLOGY: QUALITATIVE

SECTION 2: Control – ranking and rating

Q6. Thinking back to those ten issues you said you worry about the most, please tell us what it is about this issue that concerns you? And, please what it is about this issue that makes you feel that you have this level of control over it?

Issue	Concern	Control
Issue 1 (Response from Q1)	(Record Response)	(Record Response)
Issue 2 (Response from Q1)	0	0
Issue 3 (Response from Q1)	0	0
Issue 4 (Response from Q1)	0	0
Issue 5 (Response from Q1)	0	0
Issue . (Response from Q1)	0	0
Issue 10 (Response from Q1)	0	0

METHODOLOGY: QUALITATIVE

SECTION 2: Federal voting intention

Q7. If a Federal Election were to be held today, who would receive your first preference vote for the House of Representatives?

Issue	Concern
1. Australian Labor Party	Continue to Q9
2. Liberal Party	Continue to Q9
3. National Party	Continue to Q8
4. Greens	Continue to Q8
5. Democrats	Continue to Q8
98. Another party or independent candidate	Continue to Q8
99. Can't say	Continue to Q7

METHODOLOGY: QUALITATIVE

SECTION 2: Federal voting intention

Q8. Are you currently leaning towards giving your first preference vote to any of the following?

Issue	Concern
1. Australian Labor Party	Continue to Q9
2. Liberal Party	Continue to Q9
3. National Party	Continue to Q8
4. Greens	Continue to Q8
5. Democrats	Continue to Q8
98. Another party or independent candidate	Continue to Q8
99. Can't say	Continue to Q9

METHODOLOGY: QUALITATIVE

SECTION 2: Federal voting intention

Q9. And who out of the Labor Party or the Liberal Party would receive your second preference?

(Randomize)	
1. Australian Labor Party	Continue to Q9
2. Liberal Party	Continue to Q9
3. Can't say	Continue to Q9

METHODOLOGY: QUALITATIVE

SECTION 3: Personal financial situation

Q10. Thinking about your financial position at the moment on a scale from 0 to 10, where 0 is really struggling to make ends meet and 10 is very comfortable, how would you describe your financial position?

Really struggling to Make ends meet 0	1	2	3	4	5	6	7	8	9	Very Comfortable 10	Can't say 99
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Q11. How would you describe your financial position now, compared with 12 months ago?

1. Much worse that it was 12 months ago
2. Worse that it was 12 months ago
3. About the same as it was 12 months ago
4. Better than it was 12 months ago
5. Much better than it was 12 months ago
99. Can't say

METHODOLOGY: QUALITATIVE

SECTION 3: Personal financial situation

Q12. What do you expect your financial situation will be in 12 months time, compared with now?

1. Much worse than it is now
2. Worse than it is now
3. About the same as it is now
4. Better than it is now
5. Much better than it is now
99. Can't say

METHODOLOGY: QUALITATIVE

SECTION 4: National direction

Q13. Generally speaking, would you say that things in this country are headed in the right direction or the wrong direction

1. Right direction
2. Wrong direction
99. Can't say

Q14. Thinking about where we are headed now compared with where we were headed five years ago are things:

1. Much worse than five years ago
2. Worse than five years ago
3. About the same as five years ago
4. Better than five years ago
5. Much better than five years ago
99. Can't say

METHODOLOGY: QUALITATIVE

SECTION 4: National direction

Q15. Thinking about where we are headed now and where you expect we will be headed in five years time will things be:

1. Much worse in five years time
2. Worse in five years time
3. About the same in five years time
4. Better in five years time
5. Much better in five years time
99. Can't say

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

Q16. Please indicate how often you use the following brands or categories listed below.

	REGULARLY	INFREQUENTLY	NEVER
Coca-Cola			
Diet Coke			
Coke Zero			
Nestea			
Mount Franklin			
Goulburn Valley Juice			
Goulburn Valley Milk			
Imported premium beer			
Domestic premium beer			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Standard beer			
Light beer			
Draught beer			
VB			
Crown			
Tooheys New			
Hahn Super Dry			
Lindemans			
Wolf Blass			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Rosemount			
Yellowglenn			
Yellow Pages online			
White Pages online			
Seek			
Google			
Bing			
Sensis			
Yellow Pages printed directory			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
American Express personal card			
American Express business card			
St. George			
Bendigo Bank			
Commonwealth Bank			
ANZ			
National Australia Bank			
Westpac			
BankWest			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
ING			
Vodafone			
Telstra			
Optus			
Virgin			
3			
Samsung			
Apple/ Macintosh			
Sony			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Canon			
LG			
Fisher & Paykel			
Westinghouse			
Lenovo			
Toshiba			
Motorola			
Kodak			
Microsoft			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
BMW			
Mitsubishi			
Toyota			
Mini			
Subaru			
Ford			
Holden			
Mazda			
Powerball			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Lotto			
Lucky Lotteries			
Oz Lotto			
Instant Scratchies			
Medibank			
HCF			
AAMI			
MBF			
NIB			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Allianz			
GIO			
NRMA			
RACQ			
APIA			
Woolworths			
Coles			
Franklins			
IGA			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Aldi			
Myer			
David Jones			
QANTAS			
Emirates			
British Airways			
Singapore Airlines			
Optifast			
Panadol			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Herron			
Nurofen			
Dove			
Palmolive			
Johnsons & Johnsons			
Vaseline			
Intel processor			
Blackmores			
Sustagen			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Ethical Nutrients			
Cenovis			
Nature's Own			
Nature's Way			
Swisse			
Office works			
Toblerone			
Cadbury			
Nestlé			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Lindt			
Green & Blacks			
Milo			
Ovaltine			
Nesquik			
Sustagen			
KFC			
McDonald's			
Pizza Hut			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
McCain			
SPC			
Kraft			
McCormick			
Uncle Toby's			
Nescafé			
Maggi			
Soothers			
Butter-Menthol			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Lean Cuisine			
Papa Giuseppe's			
Peters			
Allen's			
Carnation			
Huggies			
Snugglers			
Joey's			
Moltex			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Pampers			
Purina One			
Beneful			
Pro Plan			
Supercoat			
Bonnie			
Eukanuba			
Advance			
Pal			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Science Diet			
Optimum			
Lucky Dog			
Purina			
Total care			
Friskies			
Fancy Feast			
Whiskas			
Toll roads (roads that you have to pay to use)			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

Q17. Please indicate how frequently you participate in any of the following activities:

	REGULARLY	INFREQUENTLY	NEVER
Visiting Taronga Zoo, Sydney			
Visiting Western Plains Zoo, Dubbo			
Watching sport on TV at home			
Watching sport at the pub or other venue outside of the home			
Watching Rugby Union on TV at home			
Watching Rugby Union on TV at the pub or other venue outside of the home			
Playing Rugby Union			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

	REGULARLY	INFREQUENTLY	NEVER
Playing Rugby League			
Going on long weekends away in NSW			
Going on long weekends away in VIC			
Going on long weekends away in QLD			
Going on trips for 4 or more days within Australia			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

Q18. Please indicate how frequently you participate in any of the following activities:

	RESPONSE
I am not a QANTAS frequent flyer	
I am a Bronze QANTAS frequent flyer	
I am a Silver QANTAS frequent flyer	
I am a Gold QANTAS frequent flyer	
I am a Platinum QANTAS frequent flyer	
I am not an Emirates frequent flyer	
I am a Blue Emirates frequent flyer	
I am a Silver Emirates frequent flyer	
I am a Gold Emirates frequent flyer	

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

Q19. Do you own a dog or a cat?

Dog	Yes	No
Cat	Yes	No
Both	Yes	No

Q20. How would you rate your last experience at the RTA or Motor Registry?
(Please select one, where 0 = not at all pleasant and 10= extremely pleasant)

0	1	2	3	4	5	6	7	8	9	10

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

Q21. Thinking about toll roads (roads that you have to pay to use) do you use them
(Please select one)

	RESPONSE
Decide based on traffic conditions and how long you have to reach your destination whether to use a toll road	
Always try and use the fastest route whether or not that involves using a toll road	

Q22. How would you rate your last experience at the Post Office?
(Please select one, where 0 = not at all pleasant and 10= extremely pleasant)

0	1	2	3	4	5	6	7	8	9	10

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

Q23. Please indicate if you have heard of any of the foundations below:

	Yes	No	Unsure
McGrath Foundation			
St. George Foundation			
Ronald McDonald House			
National Breast Cancer Foundation			
Alzheimer's Australia			

METHODOLOGY: QUANTITATIVE

SECTION 5: Brand use

Q24. (If female) Thinking about the free vaccine programme against cervical cancer, have you?
(Please select one of the following)

Had none of the injections	Yes
Had some but not all of the injections	Yes
Had all of the injections	Yes
Never heard of the free vaccine programme	Yes
Not prepared to say	Yes

METHODOLOGY: QUANTITATIVE

SECTION 6: Additional Demographics

Q25. What is your living situation? (Please select one answer)

1. Single	
2. Married / partner with no children	
3. Married / partner with children 13 years old or younger and are living at home	
4. Single parent with children 13 years old or younger and are living at home	
5. Married / partner with children over 13 years of age and are living at home	
6. Single parent with children over 13 years of age and are living at home	
7. Married / partner / single with children who have left home	

METHODOLOGY: QUANTITATIVE

SECTION 6: Additional Demographics

Q26. What is your gross annual household income? (Please select one answer)

1. Under \$30,000	
2. \$30,000 to \$39,999	
3. \$40,000 to \$49,999	
4. \$50,000 to \$69,999	
5. \$70,000 to \$89,999	
6. \$90,000 to \$109,999	
7. \$110,000 to \$ 129,999	
8. \$130,000 to \$149,999	
9. \$150,000 or above	
10. Not prepared to say	
11. Don't know	

METHODOLOGY: QUANTITATIVE

SECTION 6: Additional Demographics

Q27. What is your current occupational status? (Please select one answer)

1. Unemployed	
2. Stay at home parent	
3. Working part time	
4. Working full time	
5. Retired	
6. Not prepared to say	

METHODOLOGY: QUANTITATIVE

SECTION 6: Additional Demographics

Q28. Which of the following best describes your cultural background?

(Please select one answer)

1. I was born overseas	
2. First generation Australian (My parents were born overseas, but I was born in Australia)	
3. Second generation Australian (My grandparents were born overseas, but my parents and I were born in Australia)	
4. Third (or more) generation Australian (Both my grandparents, my parents and I were born in Australia)	
5. Torres straight Islander	
6. Indigenous Australian	
7. Expat	
8. Not prepared to say	
9. Don't know	

METHODOLOGY: QUANTITATIVE

SECTION 6: Additional Demographics

Q29. What is the highest level of education that you have completed?
(Please select one answer)

1. High school	
2. Tafe/college	
3. University	
4. Not prepared to say	
5. Don't know	

Q30. What is your postcode?

