

Consumer Trends & The Economic Cycle

A presentation by:
Howard Seccombe
Director, Client Services
Roy Morgan Research

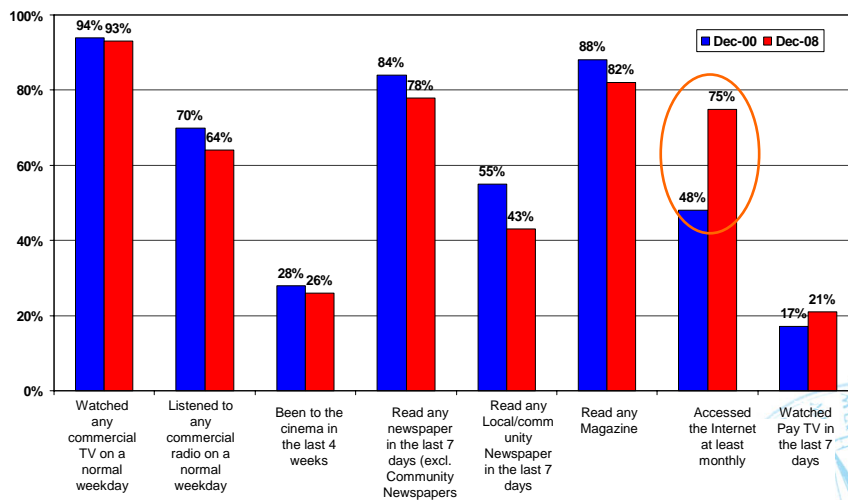
11 February 2009

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1

Media Consumption The growth of the internet



Base: Aust Population aged 14+, 12mths to Dec 00 vs 12mths to Dec 08
Source: Roy Morgan Research

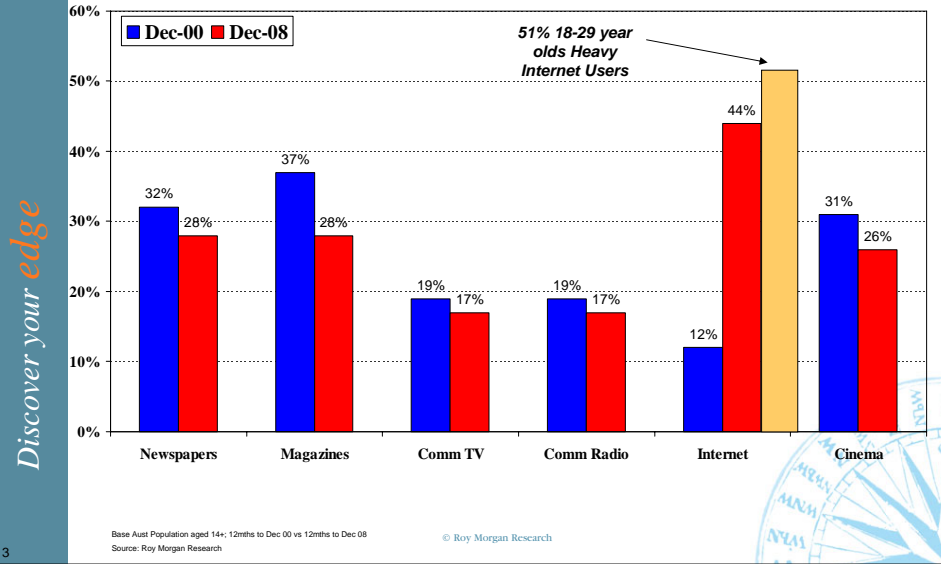
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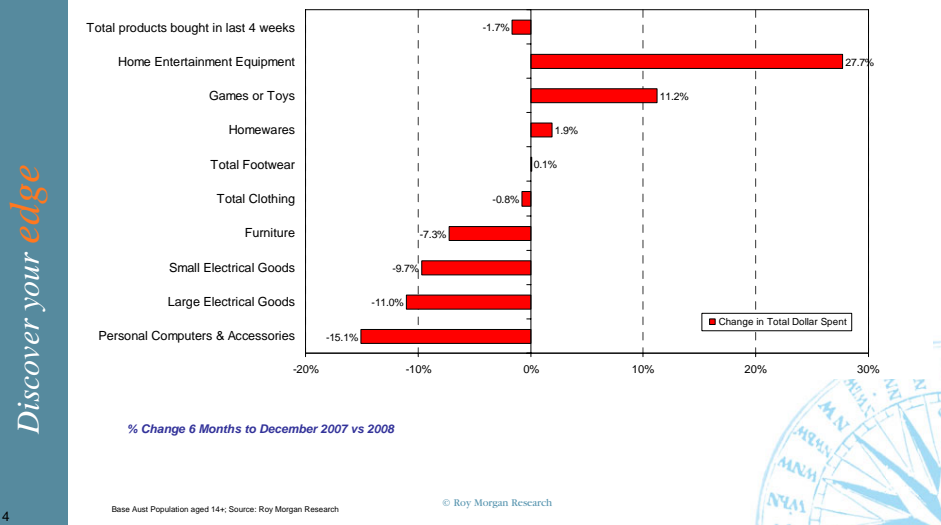
Heavy Media Consumption

A lead indicator ...



Retail – Discretionary Expenditure

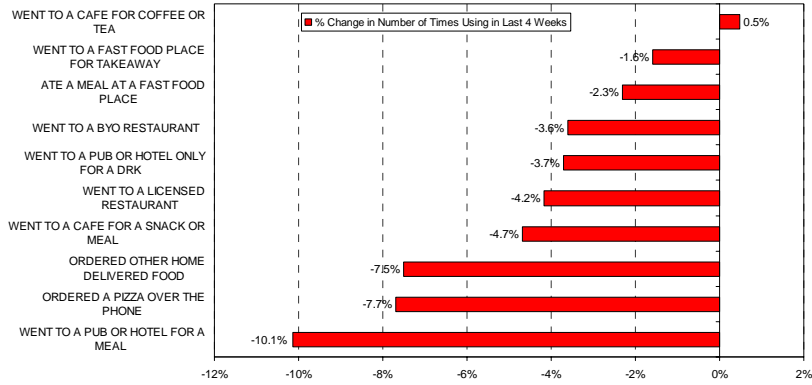
Entertainment category defies downturn



Retail – Eating Out

'Feel Good' cheap rewards

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% Change 6 Months to December 2007 vs 2008

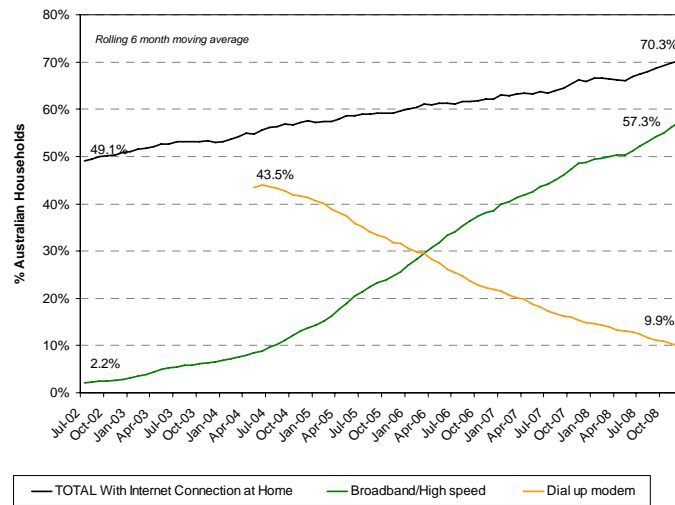
Base Aust Population aged 14+. Source: Roy Morgan Research

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Internet Penetration

Internet & broadband - an essential service

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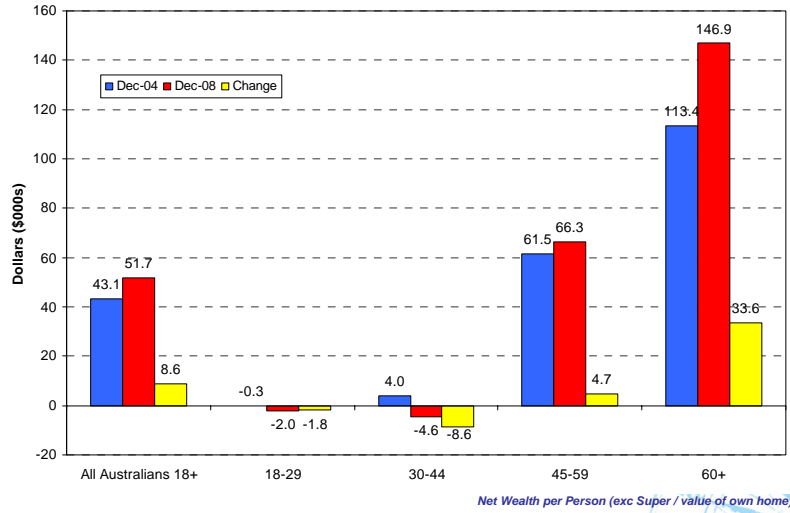


Base Aust Population aged 14+. Source: Roy Morgan Research

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Net Wealth

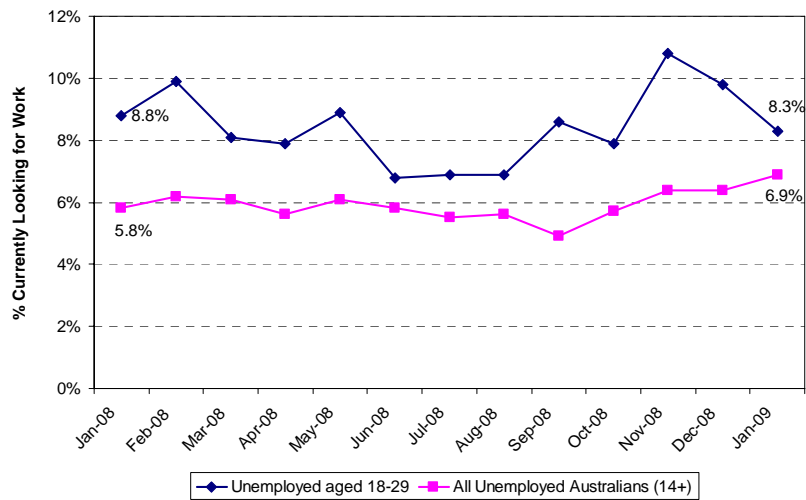
Younger people doing it tough but critical to retail economy



Base Aust Population aged 18+, 12mths to Dec 04 vs 12mths to Dec 08
Source: Roy Morgan Research

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Unemployment

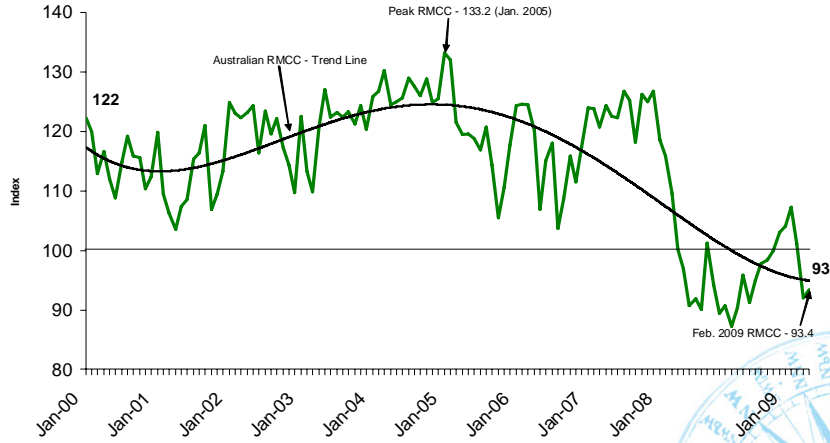


Base Aust Population aged 14+, Source: Roy Morgan Research

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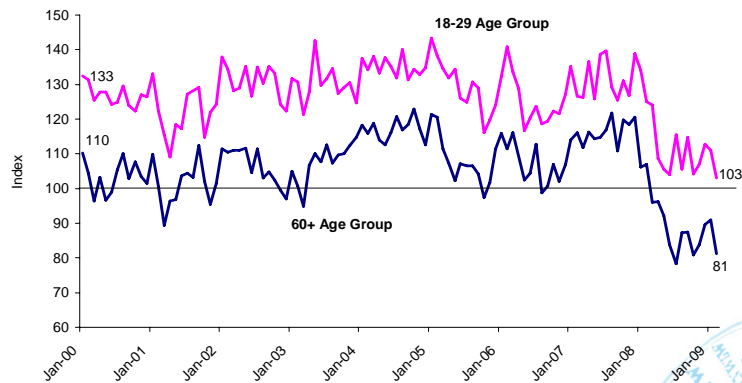
Consumer Confidence

A lead indicator



Consumer Confidence

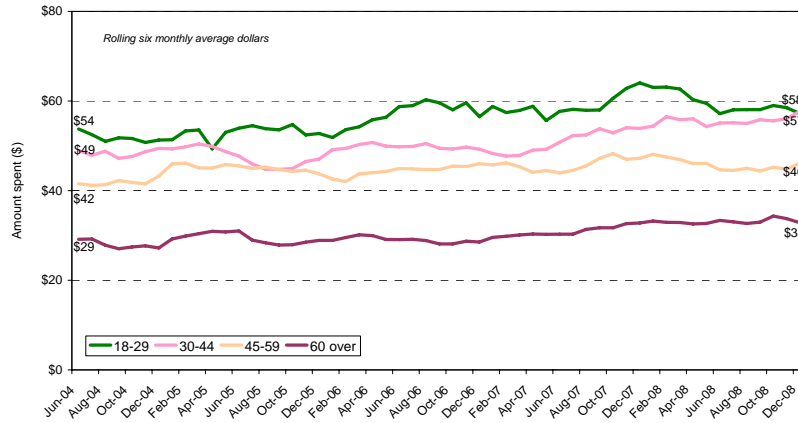
Younger people always more confident



Average Monthly Mobile Phone Spend

Younger people critical to category

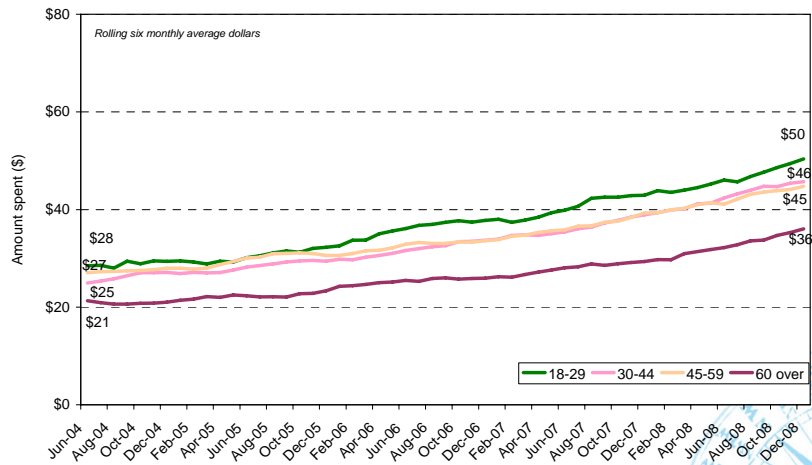
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Average Monthly Internet Spend

Younger people critical to category

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Key Points

- Technology / Broadband is a critical category
- Performs better than most other categories in an economic downturn
- Will be one of the first to benefit from an upturn
- A decision to reduce investment now could lead to competitive disadvantage



Thank you.

The State Of The Nation Report



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