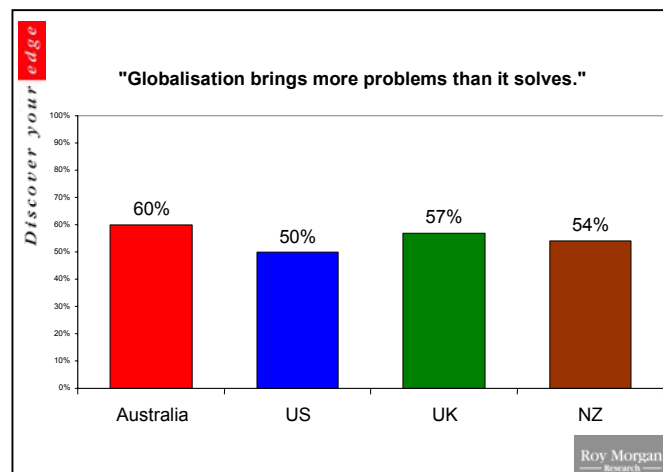


Globalisation – An International Perspective

Future Summit 2004
Creating A Better World
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'Globalisation brings more problems than it solves' is a fairly widely held view – even in the US. The latest Roy Morgan International research¹ shows that a majority of Australians (60%) believe 'Globalisation brings more problems than it solves', as do 57% in the UK, 54% in New Zealand and 50% in the US.



More Australians now believe the Howard L-NP Government will be returned at the next Federal Election². The latest Morgan Poll has the L-NP ahead – 10 points on the “Think will win” question. Yet more say if an election were held today they would vote for the ALP. On a two-party preferred basis the ALP leads the L-NP - 53.5% to 46.5%.

¹ Roy Morgan International research is part of the continuous Roy Morgan Single Source Survey.

http://www.roymorgan.com/products/single-source/single-source_home.cfm

The data reported in this paper is based on surveying cross-sections of the population aged 14 years and over:

- In Australia: 27,659 interviews October 2003 - March 2004
- In USA: 2,499 interviews October 2003 – February 2004
- In UK: 1,570 interviews October 2003 – February 2004
- In NZ: 4,958 interviews October 2003 – February 2004

² Morgan Poll Finding No.3738 – Small L-NP Gain, But ALP Retains Lead in Voter Support - May 7, 2004

<http://www.roymorgan.com/news/polls/2004/3738/>

And what of our troops in Iraq?

Australians are divided on whether we should have a presence in Iraq³ with 50% of Australians believing we should and 46% saying we shouldn't while 4% are undecided. However given that the troops are there, the majority of Australians (58%) agree with Prime Minister Mr Howard that Australian troops should stay in Iraq until the job is done, 38% agree with Mr Latham that we should bring the troops home by Christmas while 4% are undecided. These are the findings of a special Morgan telephone poll conducted in early April.

Our attitude towards whether we should stay in Iraq changes depending on who asks us to stay. There is strong disagreement (61%) on staying in Iraq if the US asks us to stay while 63% say we should continue to have a military presence in Iraq if asked by the new Iraqi Government and 84% would agree if the UN sent peacekeepers to Iraq.

On April 3, Gary Morgan said

“The Morgan Poll results show strong approval for Mr Howard’s stance that Australian troops should stay in Iraq until the job is done. However, unless the UN brings in peace keepers or the US hands over peacekeeping to a new Iraqi regime at the end of June, then Australian public opinion could change, as the Morgan Poll shows few support a continued military presence if only requested by the US.”

So much of what the public thinks depends... It depends on who asks, exactly what the question is, the context for the question, etc. Because of this, public opinion often appears contradictory – we believe it is often the ‘contradictions’ that provide greatest insight into the conflicts we are all confronted with.

There is no doubt Globalisation means many different things to different people, it has many facets, implications, opportunities and threats. A single question doesn't begin to get at the complexity of the issue or our feelings about it.

A careful analysis of the pattern of responses of people in each of the countries surveyed to a large number of other issues suggests the underlying dimension being measured in this question is ‘**conservatism**’.

However, public opinion, albeit sometimes simplistic and sometimes contradictory, can give us great insight into the psyche of our nation and other nations.

We'd like to share with you some of the research findings from our latest international research – in Australia, the US, the UK and NZ – on some of the issues this Summit has been grappling with: the environment, trust and the role of Government, terrorism, and the role of work in people's lives.

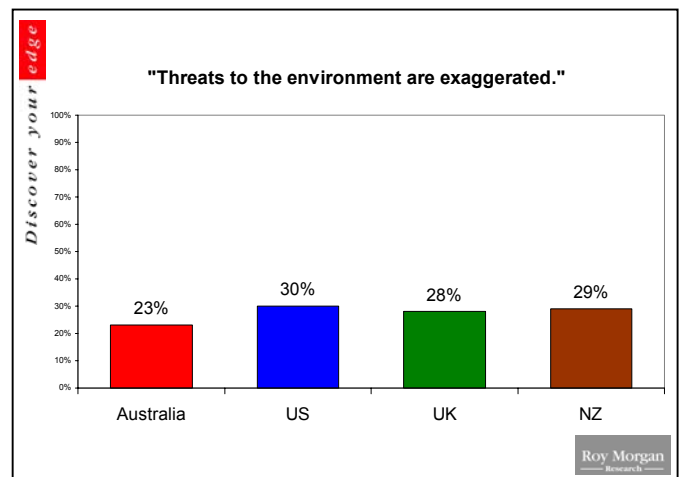
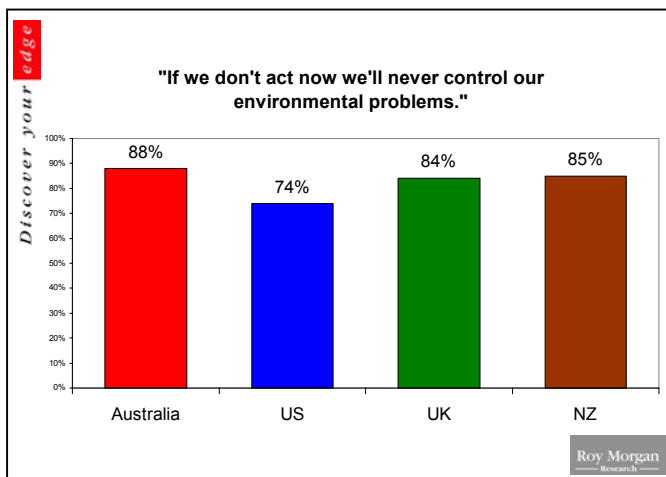
The research highlights a surprisingly deep degree of consistency across the countries, and some clear areas of divergence.

³ Morgan Poll Finding No. 3726: Our troops should stay in Iraq until job done but not at USA request, April 2004
<http://www.roymorgan.com/news/polls/2004/3726/>

The environment as an issue evokes a strong response. There was overwhelming support in all four countries for the belief that *'if we don't act now we'll never control our environmental problems'*. Few, less than one-in-three believe *'threats to the environment are exaggerated'*. And while substantial majorities of people in all countries claimed to recycle, and even to be *'an environmentalist at heart'*, most felt *'environmentally friendly products are overpriced'*.

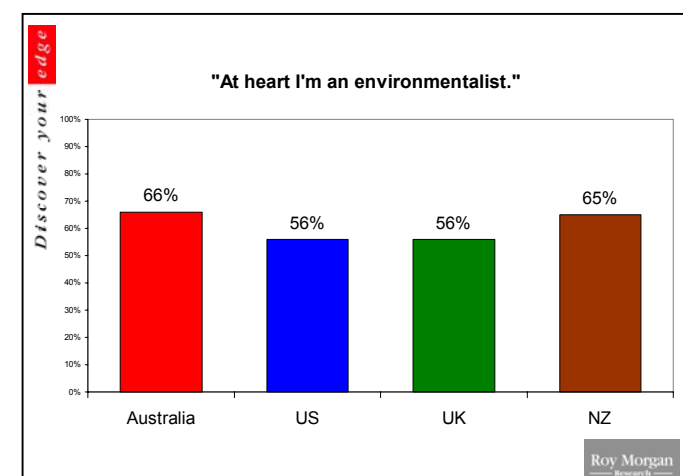
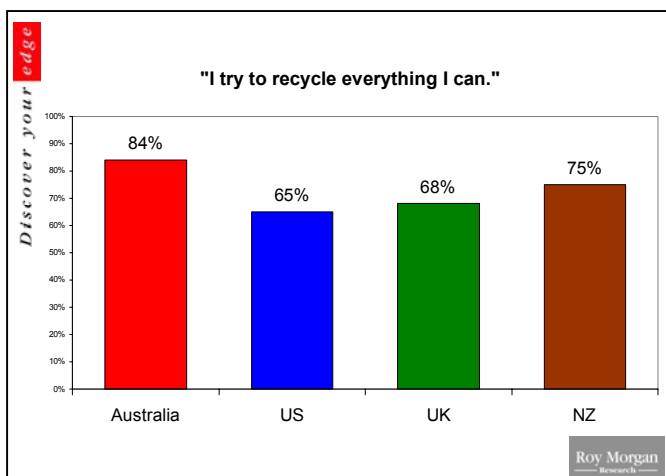
Analysis of the four countries shows consistent differences in degree of environmental engagement.

Australia at 88% is ahead of all the countries in terms of the belief *'if we don't act now we'll never control our environmental problems'*. The US at 74% is well below the other countries – UK at 84% and NZ at 85%.



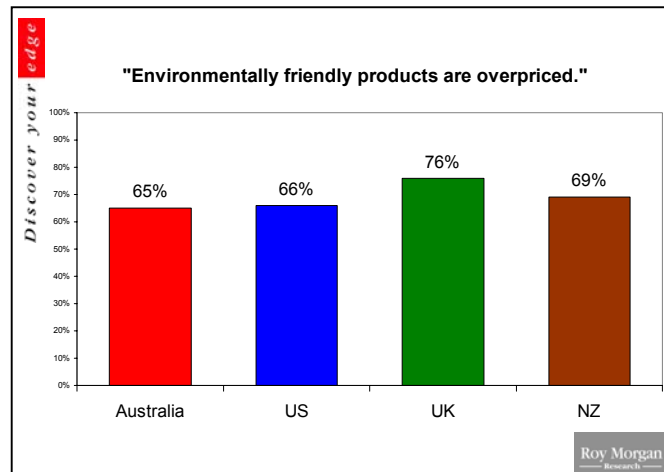
Consistent with this is the poor support registered for the idea that *'threats to the environment are exaggerated'* – less than one-in-three agreed with this view in any country. Australians were least likely (at 23%) to agree and the US being most likely to agree (at 30%) with the UK (28%) and NZ (29%).

This pattern continues in terms of behaviour with Australians most likely to *'try to recycle everything I can'* (84%), Americans least likely (65%), UK (68%) and NZ (75%).



Australians were also most likely at (66%) to consider themselves *'an environmentalist at heart'*, Americans at 56% were equally least likely with those from the UK. 65% of New Zealanders consider themselves *'environmentalists'*.

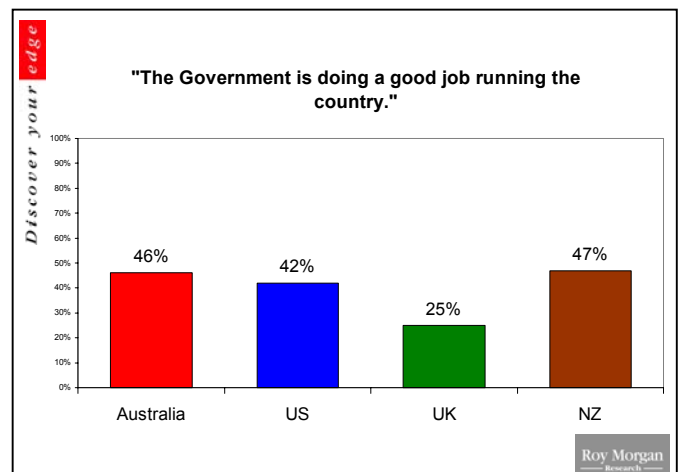
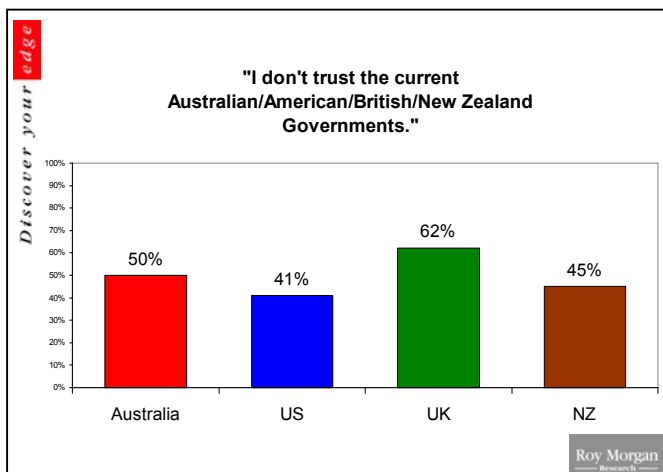
When it comes to environmentally friendly products, the UK stood out – 76% saying ‘*environmentally friendly products are overpriced*’. This is ahead of New Zealand (69%), US (66%) and Australia (65%). As the UK is no less environmentally conscious or concerned, this is clearly a response to something else – most likely a particular UK market issue not a social value based difference between Brits and the rest of us.



What about the Government?

The question of “Trust” has been a topical one, to say the least, in recent times.

The net result, 50% of Australians ‘*don’t trust the current Australian Government*’. 41% of Americans ‘*don’t trust the current US Government*’, 45% of New Zealanders don’t trust their Government, and a large 62% in the UK do not trust their Government. This UK figure represents a 50% increase in distrust since 2001 – when only 41% said they didn’t trust the Government.

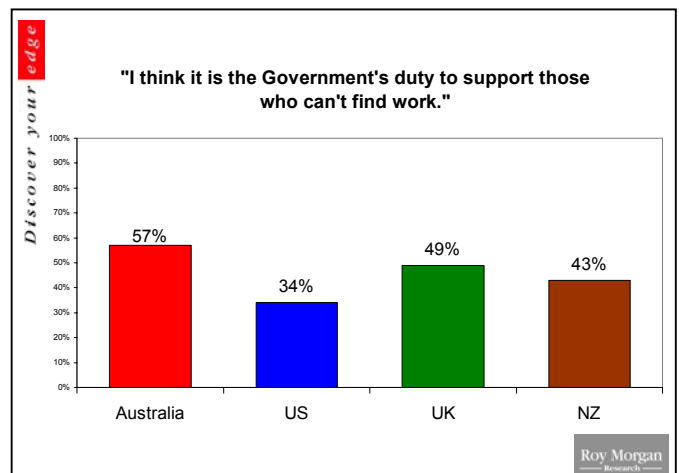
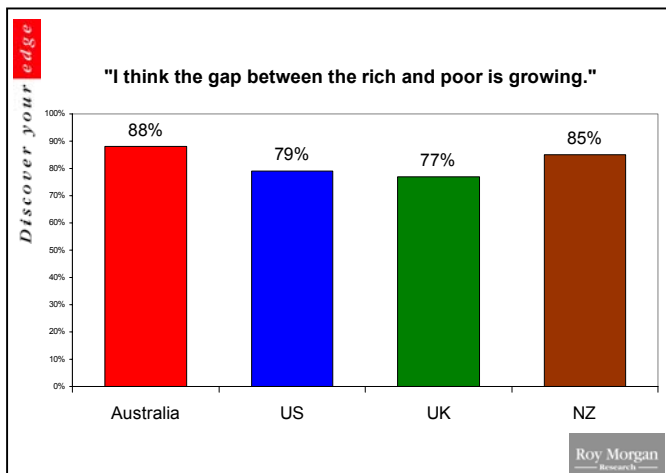


On the question of whether the Government is doing a good job running the country, in no country is majority approval recorded. Closest is NZ where 47% consider their Government is doing a good job, followed by Australians at 46%, and the US at 42%. In the UK only one-in-four, or 25% now consider their Government to be doing a good job running the country (this is down from 42% in 2001).

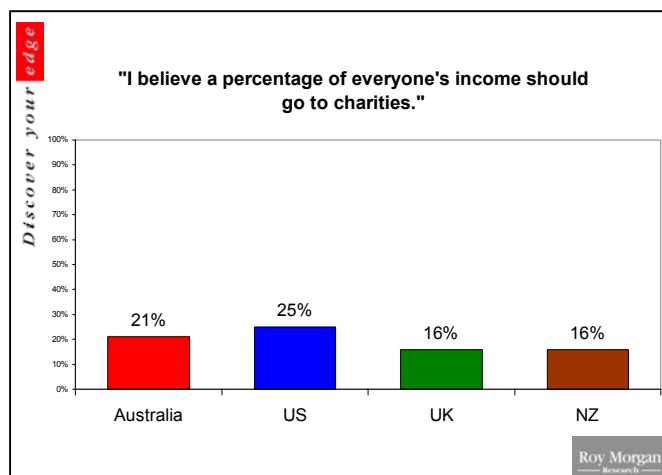
Generally, movements in this question relate to the economic state of the country – so the Government is considered to be doing a good job when the economic indicators are positive.

Clearly in the UK, the trust issue for Prime Minister Tony Blair is flowing over into the broader perception about the way the country is being run.

Questions about ‘the rich and the poor’, and social responsibility separate the four countries in a somewhat stereotypical way. A clear majority in every country believes ‘*the gap between the rich and poor is growing*’. However, Australians (88%) and New Zealanders (85%) are substantially more likely to hold the view than people in either the US (79%) or the UK (77%).



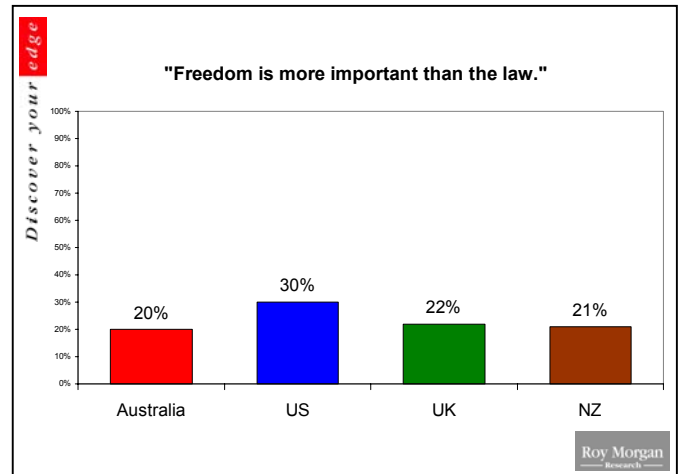
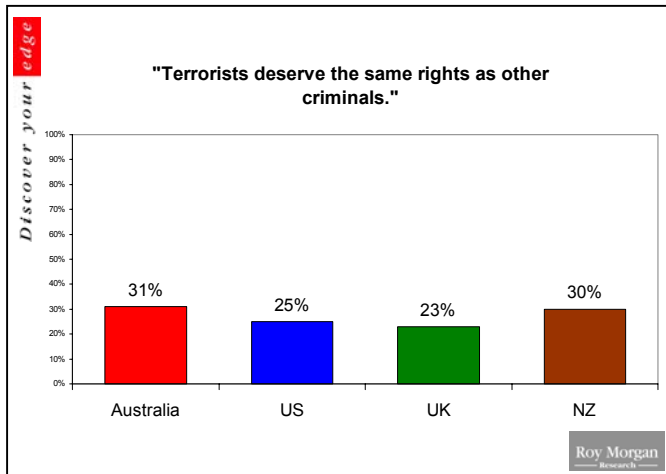
Australians (at 57%) are most likely to believe ‘*it is the Government’s duty to support those who can’t find work*’, Americans (at 34%) are least likely to hold this view. However, Americans are more likely (albeit still only at 25%) to believe ‘*a percentage of everyone’s income should go to charities*’.



We now look at a series of questions that begin to capture the response of people in these countries to the recent terrorism and international unrest. These findings are “chilling” within the context of the paper presented by Malcolm Fraser, Australia’s former Prime Minister, on the ‘Conflict between the Rule of Law and National Security’⁴ in his Keynote Address, May 7, 2004, at the Future Summit 2004, Creating A Better World.

⁴ <http://www.roymorgan.com/resources/pdf/papers/20040503.pdf>

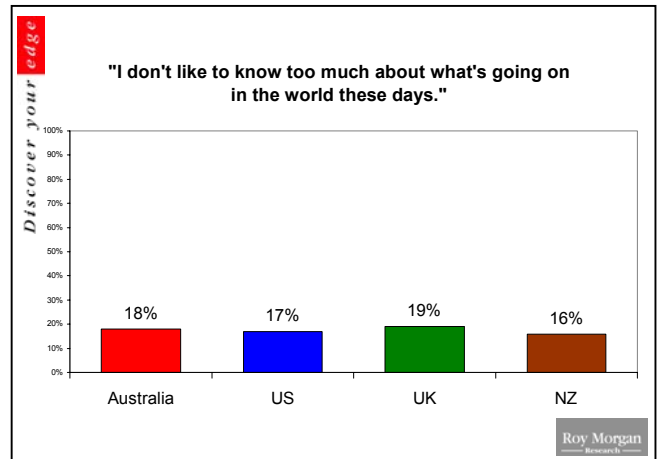
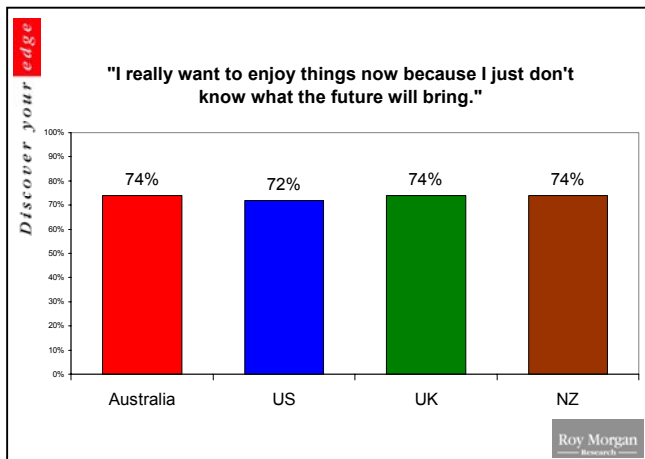
Less than one-in-three people in any of the four countries believe *'terrorists deserve the same rights as other criminals'*. Australia (31%) and New Zealand (30%) are more likely to hold the view than those in the US (25%) or UK (23%).



While fewer than one-in-three also support the view that *'freedom is more important than the law'*, the US stands out on this issue – with 30% holding the view compared to around 20% in the other countries. Freedom is, of course, a core American value and belief.

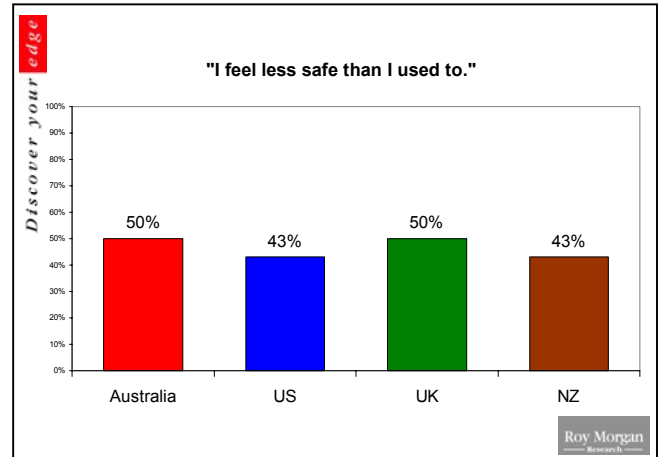
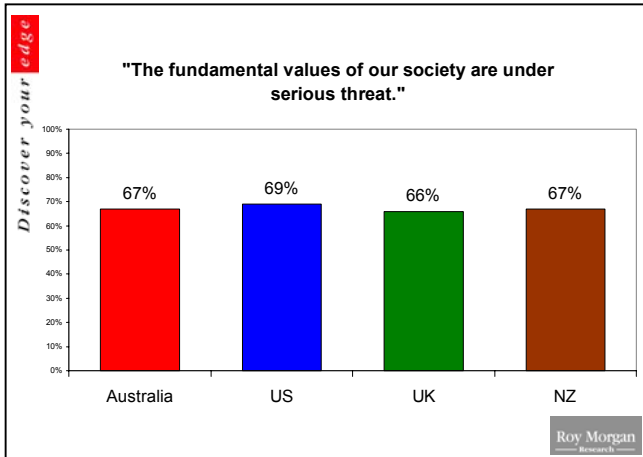
There was fairly remarkable consistency across the four countries in the next three related issues.

Over 70% in all countries agreed *'I really want to enjoy things now because I just don't know what the future will bring'*.



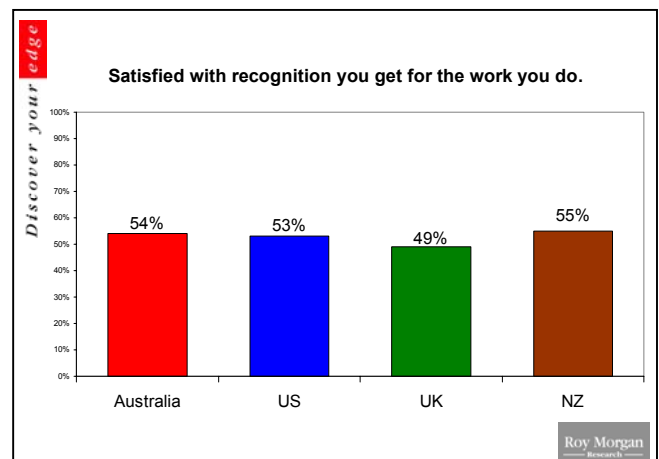
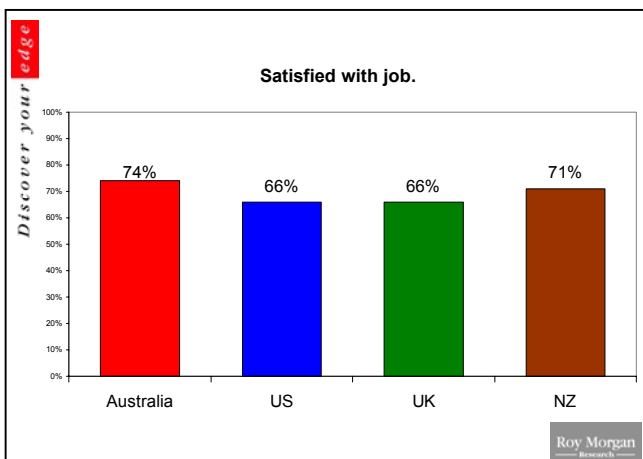
On the question designed to pick up a sense of withdrawal *'I don't like to know too much about what's going on in the world these days'*, less than 20% in all countries agreed.

This, despite the finding that a two-third majority in all countries agree ‘*the fundamental values of our society are under serious threat*’, and around half claim to feel less safe than they used to. In Australia and the UK, 50% claim to feel less safe. In the US and NZ the figure is somewhat lower at 43%.



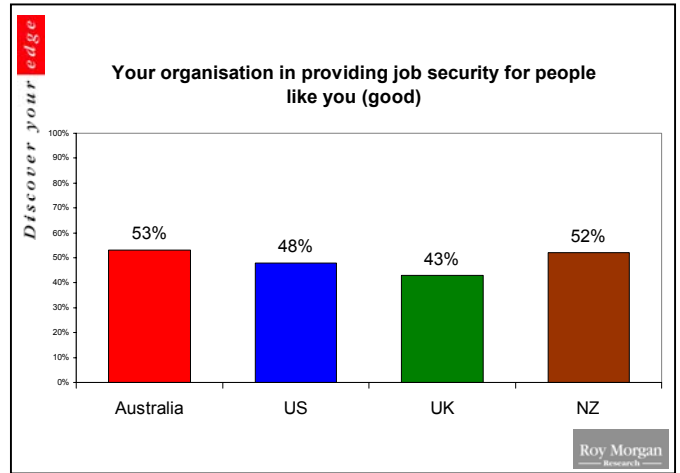
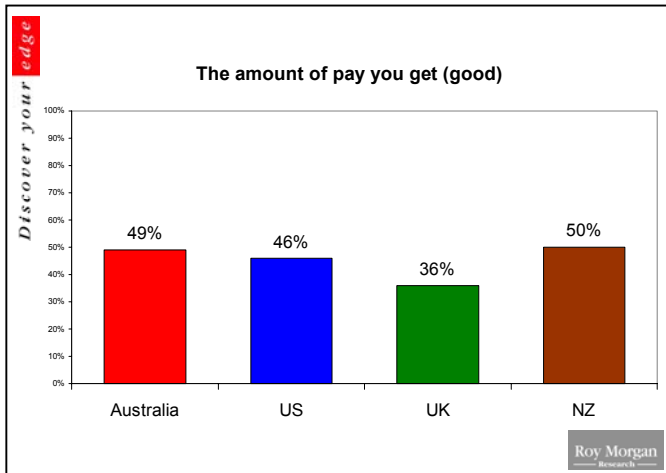
As we prepare for the opportunities that a Free Trade Agreement with the US will create, many of which relate to the movement of people between Australia and the US, it is interesting to compare some of the workplace, cultural and other issues.

First, **Australians top the list for job satisfaction** – 74% of employed Australians claim to be satisfied with their job – ahead of NZ workers at 71%, and the US and UK at 66%. Australia and New Zealand are neck and neck on most employee, workplace issues and mostly satisfied, with America coming in third.



On the question of recognition for the work you do, 55% of New Zealanders claim to be satisfied as do 54% of Australians, 53% of the US and 49% in the UK.

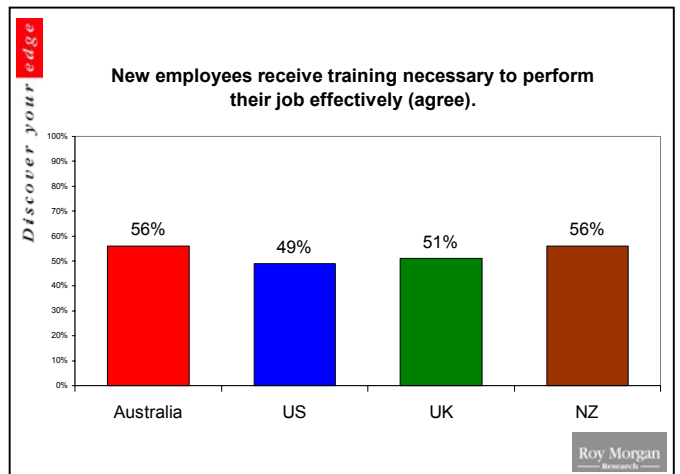
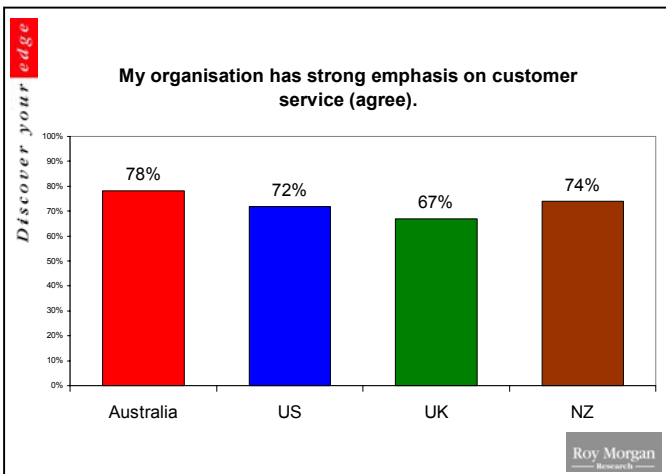
Around half in NZ (50%) and Australia (49%) rate the amount of pay they get as “good”. This is just ahead of the US at 46%, and well ahead of the UK where only 36% give their pay a “good” rating.



Australians (53%) and New Zealanders (52%) also rate their organisations as “good” for providing job security. This is ahead of the US at 48%, and well ahead of the UK at 43%.

Given our stereotypical belief that smiling customer service was born and bred in the USA, the figures on organisational focus on customer service were surprising.

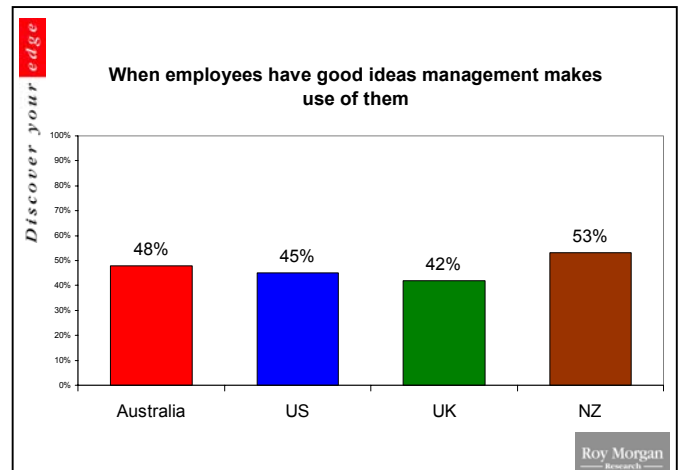
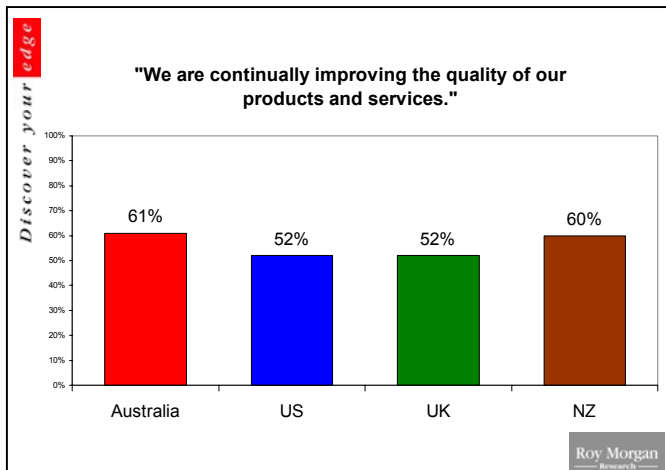
More Australians (78%) believe their ‘organisation has a strong emphasis on customer service’ than do Americans (72%) who are well ahead of the UK (67%).



Australian organisations are also given top marks along with those in New Zealand, “for training”. In Australia and New Zealand 56% of employees believe their organisation provide new employees with the training necessary to perform their job effectively. This is ahead of the UK at 51% and the US at 49%.

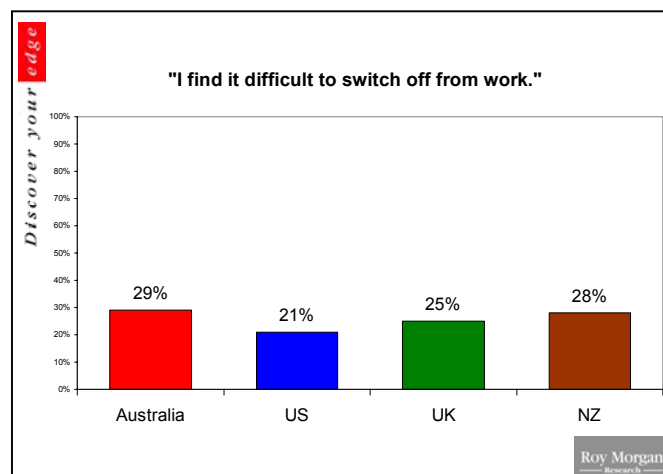
Australian and NZ organisations also rated relatively well on two important measures relating to innovation and quality improvement.

In Australia 61% of employees agree 'we are continually improving the quality of our products and services', as do 60% of NZ employees. This is well ahead of the US and UK each on 52%.



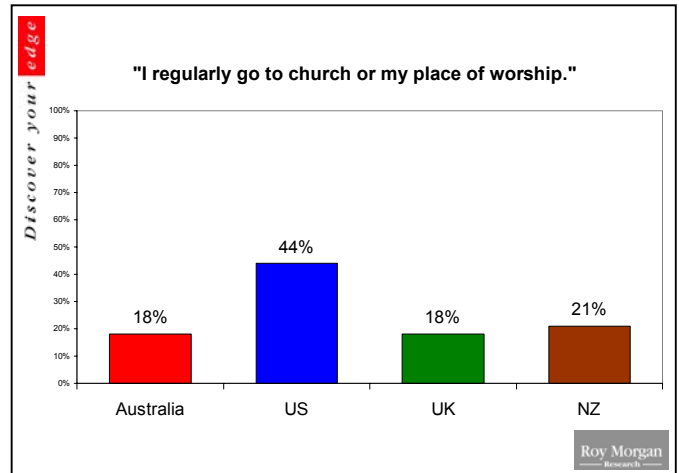
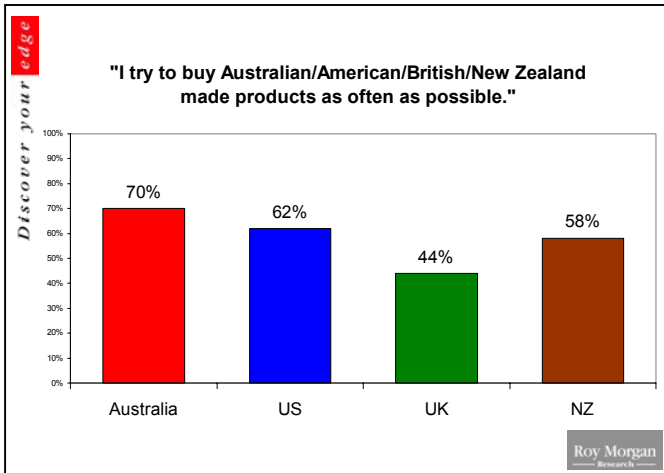
New Zealand clearly topped the list for organisation innovation – 53% of employees believing 'when employees have good ideas management makes use of them'. This was ahead of Australia at 48%, which in turn is ahead of the US at 45% and the UK at 42%.

And last, if we still harbour the view that Americans work much harder than Australians – the self reports from around the world tell a different story. Of Australian employees 29% say they 'find it difficult to switch off from work' as do 28% in NZ. This is in strong contrast to the US where only 21% have this problem.



Perhaps they are further down the 'life balance' path, maybe its therapy. The reality is Australians are as driven, or more so, than the average American.

Finally, when it comes to buying our own products, Australians take first prize – 70% say they ‘*try to buy Australian made products as often as possible*’. This is well ahead of the US at 62%, NZ at 58%, and the UK at 44%.



But when it comes to church going, Americans are way out in front - 44% of Americans ‘*regularly go to church or their place of worship*’. This is more than double Australia (18%), or UK (18%) and NZ (21%).

Also, I would like to leave you with the thought that more Americans watch Australian Rules Football than do Australians⁵.

Almost 8 million Americans (7,880,000) watch Australian Rules Football at least occasionally on television. This means Australian Rules Football is viewed by more Americans than Australians (5,328,000). More Democrats than Republicans watch Australian Rules, and yes, they are more likely to drink Foster’s.

Some things are the same the world over – the trick is to know which ones.

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⁵ Roy Morgan Research International Press Releases, Article No. 4 “*Formula 1 More Popular In Australia Than USA*” <http://www.roymorgan.com/international/pressreleases/2001/article4.html>