Future Summit Participants – Our views and how they compare

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Presented by
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Roy Morgan Research is pleased to again be the Knowledge Partner for the Future Summit. This paper presents the views of the unique group of participants at this Future Summit 2007, compares them with the views of Future Summit participants last year (2006) and the views of the Australian people and where possible with people from the US, the UK, New Zealand and Indonesia.

Roy Morgan Research asked Future Summit Participants in 2007 and 2006 the same question: *"Firstly, what do you think is the most important problem facing the world today? "* and *"What do you think is the most important problem facing Australia today?"*

This year the most dramatic change is the increased importance placed on the environment compared to other issues. This year 47% of Future Summit Participants considered environmental issues the major problem facing the world (up from 26%), and 56% considered environmental issues the most important problem facing Australia (up threefold from 18%).

"What do you think is the most important problem facing the world today?"
"What do you think is the most important problem facing Australia today?"

Most Important Problem	THE WORLD			AUSTRALIA		
	Future Summit Participants		Australians	Future Summit Participants		Australians
	2007 %	2006 %	2006 %	2007 %	2006 %	2006 %
Terrorism/Wars/Security, Safety	10	14	32	1	3	12
Economic Issues	21	27	19	7	24	20
Environmental Issues	47	26	14	56	18	8
Government, Human Issues	5	17	13	5	22	25
Social Issues	3	4	11	10	20	11
Health Issues	1	1	4	1	-	9
Energy Crisis/Depletion of Fossil/ Fuels/Petrol Prices	2	5	1	-	4	1
Other	11	6	3	20	9	8
Total	100	100	100	100	100	100

Detailed responses are presented in Appendix 1 and Appendix 2.

AUSTRALIA	USA	UK	NEW ZEALAND	INDONESIA
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Last year (2006) it was clear that the Australian people were more concerned about terrorism, wars and safety issues than were the Future Summit Participants and less concerned about economic issues and environmental issues.

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

Last year we saw that Australians view the important Environmental issues facing the world and Australia today differently. Fifty-six percent of Australians believed Global Warming issues were one of the most important Environmental issues **facing the world** today. Among Future Summit Participants, this view is reported even more widely (now 71%, unchanged since last year).

Last year 43% of Australians believed Water conservation, Water management or Drought to be the most important Environmental issue **facing Australia** – a view held by even more Future Summit Participants. In 2006, 53% of Future Summit Participants considered water management to be among the most important issues facing Australia. In 2007 this was down 12% to 41%.

	THE WORLD			AUSTRALIA		
Important Environmental Issues	**Future Summit Participants**		**Australians**	**Future Summit Participants**		**Australians**
	2007	**2006**	**2006**	**2007**	**2006**	**2006**
	%	**%**	**%**	**%**	**%**	**%**
Global Warming Issues	71	71	56	44	37	26
Pollution	5	8	27	3	6	22
Waste Management	-	3	7	1	3	7
Water Management Issues	11	16	9	41	53	35
Water Management including Drought	11	16	12	49	55	43
Natural Disasters	-	-	7	7	5	13
Depletion of Resources	9	21	18	9	18	12
Overpopulation/ Urbanisation	3	5	4	2	3	3
Other	15	30	9	15	10	10
Can't Say	-	1	8	-	7	9

(Respondents could give more than one issue.)

We hold relatively similar views on the global warming imperative. 71% of Australians and 77% (up 1%) of Future Summit Participants believe *"If we don't act now it will be too late".*

Despite the increased importance placed on environmental issues vis-à-vis other important issues facing Australia and the world, there has been a slight shift in attitude toward the environmental imperative. Fewer now say when it comes to climate change or global warming *"It is already too late"* (13% down from 16%), and slightly more say *"Concerns are exaggerated"* (10% up from 8%).

"Which of the following is closest to your view on climate change or global warming?"*

	Future Summit Participants		Australians
	2007	2006	2006
Concerns are exaggerated.	10%	8%	12%
If we don't act now it will be too late.	77%	76%	71%
It is already too late.	13%	16%	14%
Can't say.	-	-	3%

*Question was previously asked as: "*Which of the following is closes to your view of global warming?*"

Discover your edge

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

"Do you think Australia should or should not export uranium for peaceful purposes?"

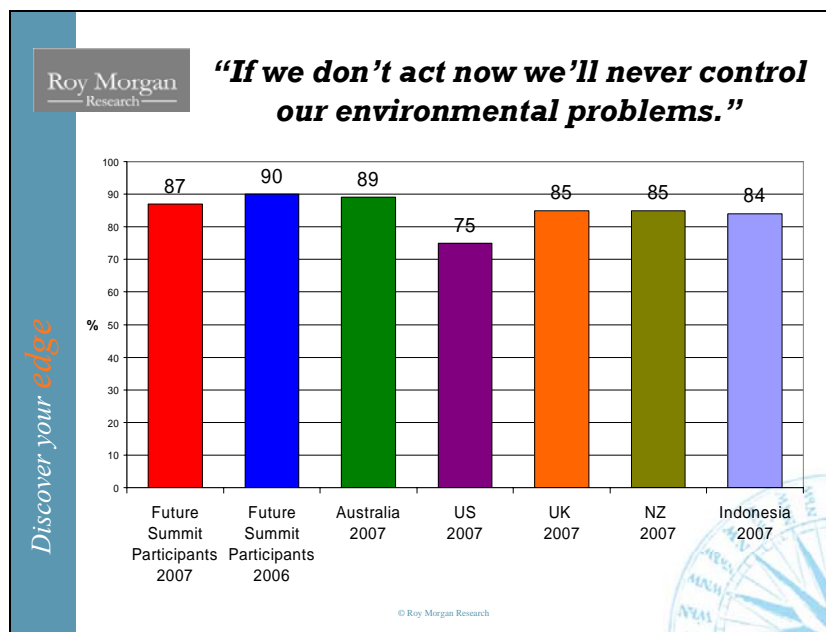|	Future Summit Participants		Australians
	2007	2006	2006
Yes, should	59%	59%	55%
No, should not	26%	26%	35%
Can't say	15%	15%	10%

Discover your edge

"*Globalisation brings more problems than it solves*" according to the majority of Australians (60%) and indeed a majority of people in the US, the UK, NZ and Indonesia[1]. However, this is a view held by only 17% (down 2% since last year) of Future Summit Participants[2].
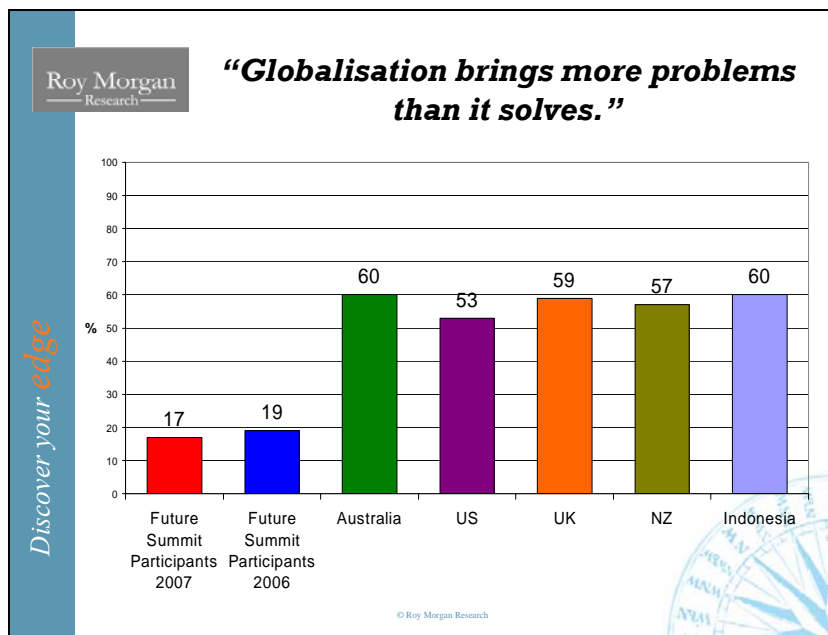
This year the most dramatic change is the increased importance placed on the environment compared to other issues. This year 47% of Future Summit Participants considered environmental issues the major problem facing the world (up from 26%), and 56% considered environmental issues the most important problem facing Australia (up threefold from 18%).

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

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[1] Roy Morgan Single Source Continuous Five Nation Study: Australia: Jan 06 - Dec 06, United States: Jul 05 - Jun 06, United Kingdom: Jul 05 - Jun 06, New Zealand: Feb 06 - Jan 07, Indonesia: Jul 05 - Jun 06
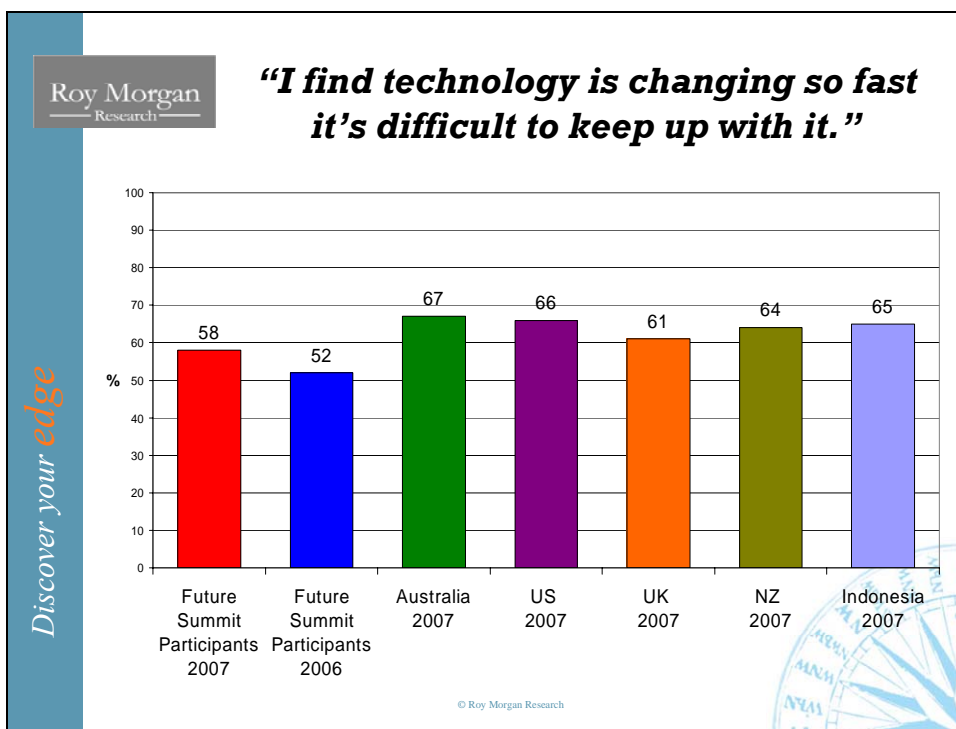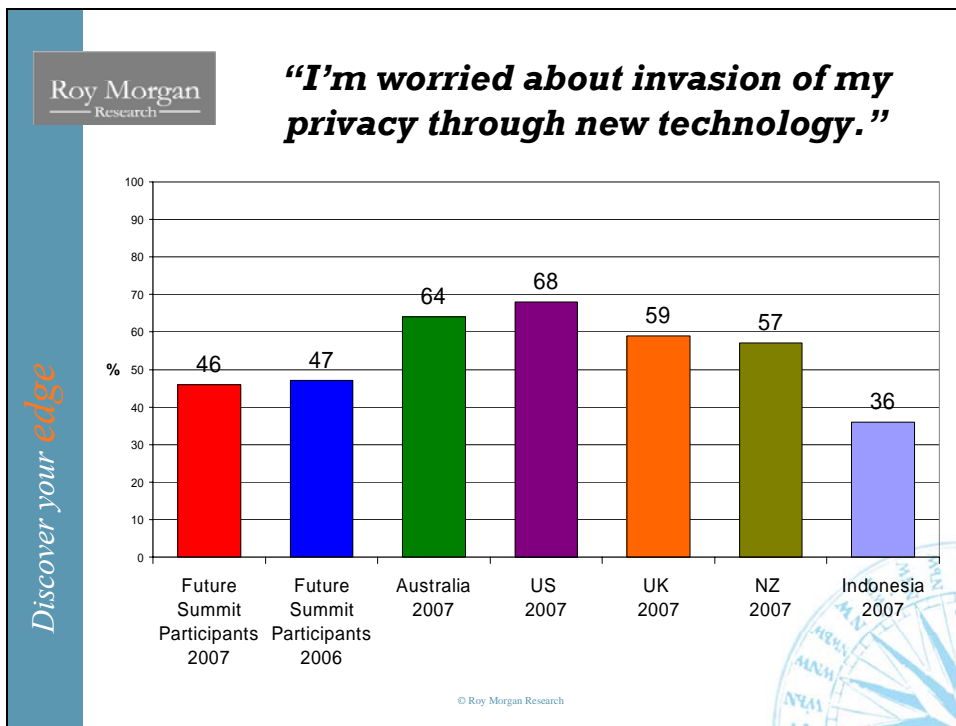[2] Future Summit Participants Survey n=148

Very few believe "*Threats to the environment are exaggerated*" – the % responses range from as low as 22% (down 1%) in Australia and the UK, to as high as 39% (up 2%) in Indonesia. Among Future Summit Participants only 16% (up 1%) subscribe to this view.
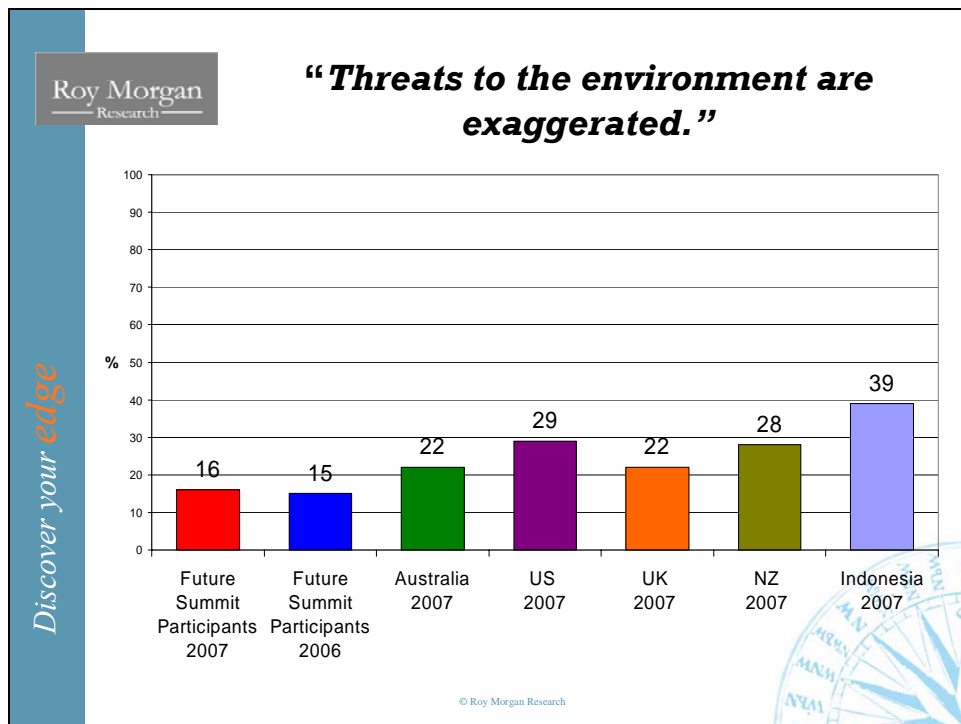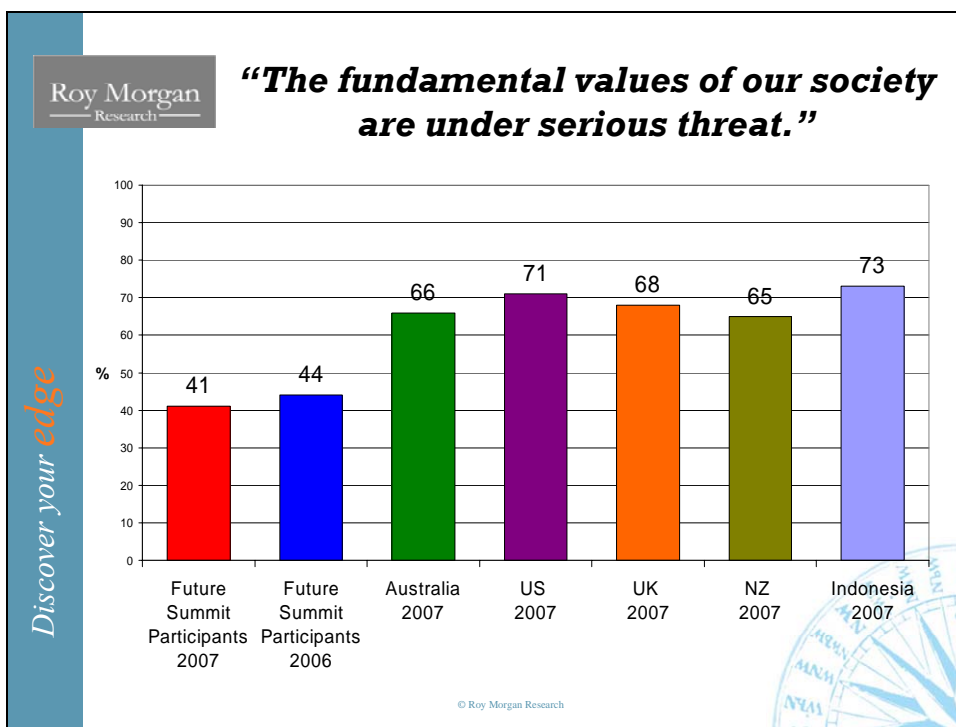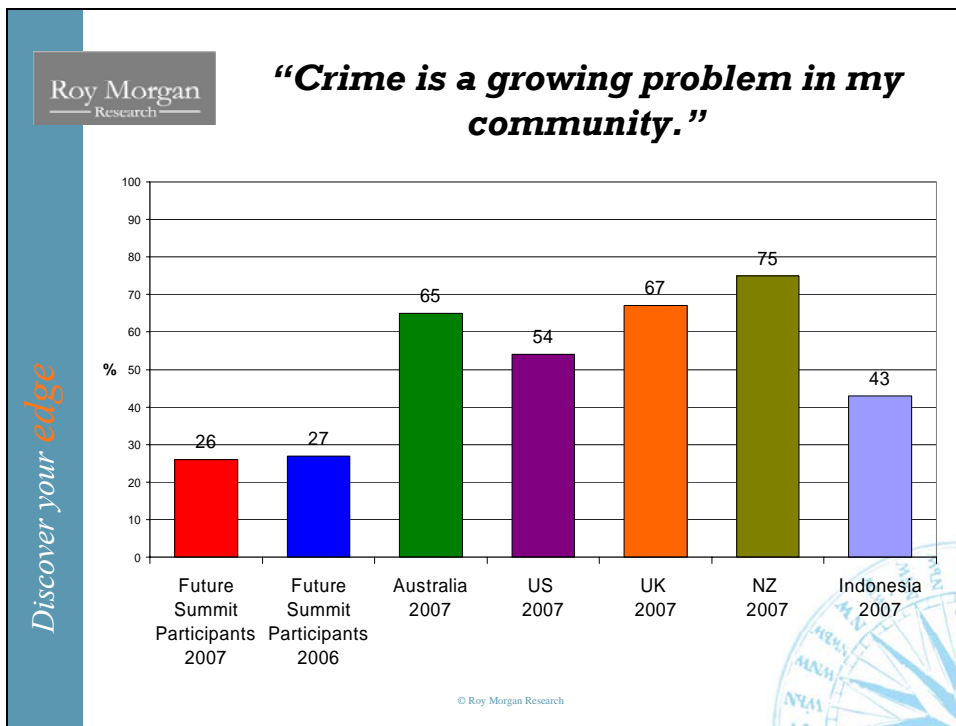

When it comes to technology, Future Summit Participants are more likely than all except Indonesians to agree "*I go out of my way to learn everything I can about technology*".
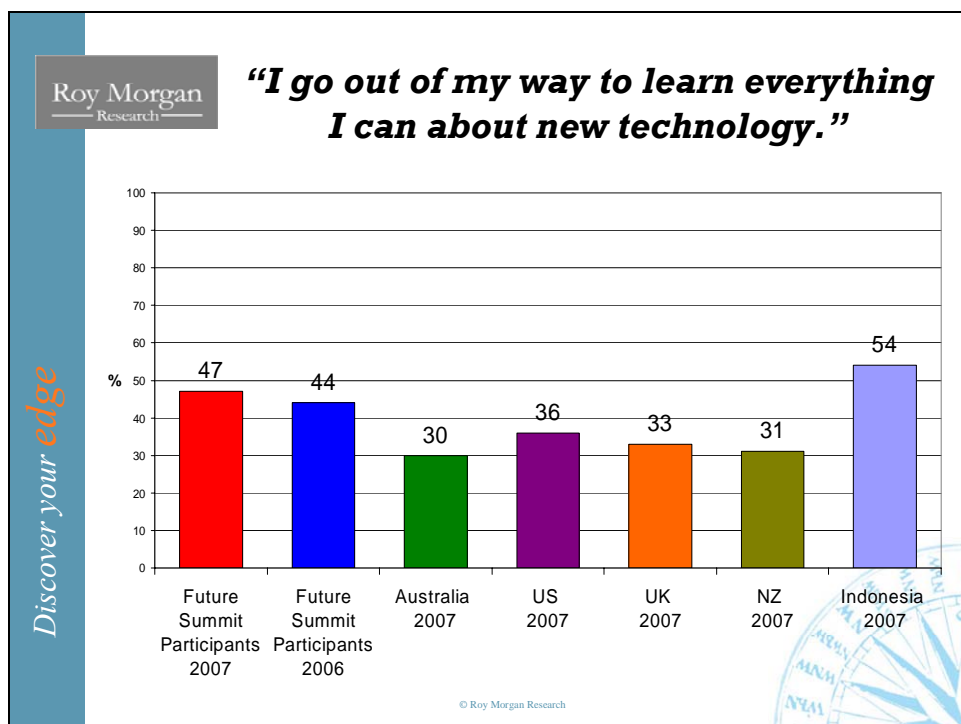
Future Summit Participants are less likely than all except Indonesians to be worried about technology and invasion of privacy; or to find technology changes too fast for them.

"I'm worried about invasion of my privacy through new technology."

	%
Future Summit Participants 2007	46
Future Summit Participants 2006	47
Australia 2007	64
US 2007	68
UK 2007	59
NZ 2007	57
Indonesia 2007	36

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"I find technology is changing so fast it's difficult to keep up with it."

	%
Future Summit Participants 2007	58
Future Summit Participants 2006	52
Australia 2007	67
US 2007	66
UK 2007	61
NZ 2007	64
Indonesia 2007	65

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

"Crime is a growing problem in my community."

Future Summit Participants 2007: 26
Future Summit Participants 2006: 27
Australia 2007: 65
US 2007: 54
UK 2007: 67
NZ 2007: 75
Indonesia 2007: 43

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"The fundamental values of our society are under serious threat."

Future Summit Participants 2007: 41
Future Summit Participants 2006: 44
Australia 2007: 66
US 2007: 71
UK 2007: 68
NZ 2007: 65
Indonesia 2007: 73

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Perhaps this is because Future Summit Participants see themselves as being in control. 89% (up 4%) consider themselves to be leaders rather than followers. This is higher even than the US national average of 59% (down 2%, 10% higher than Australia at 49%).
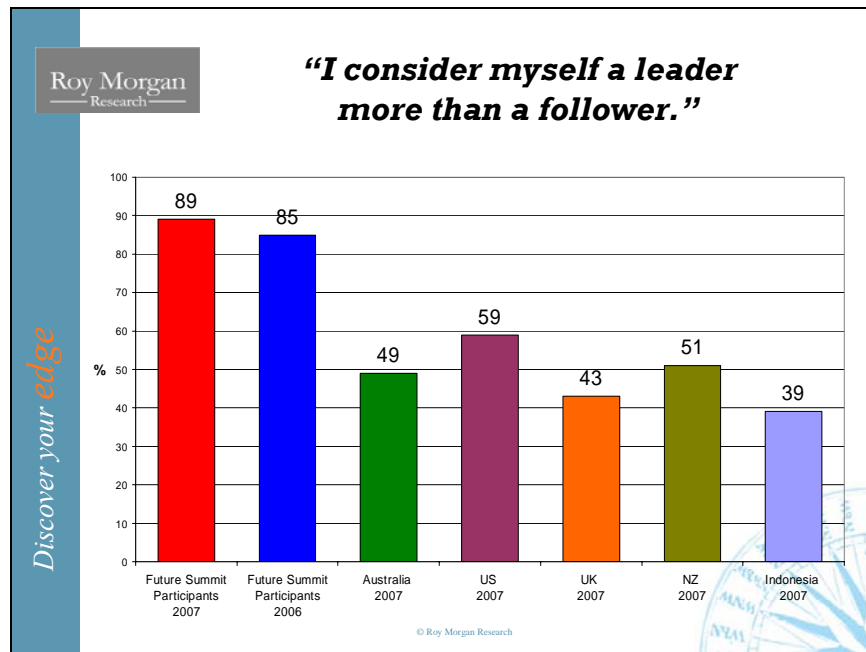
Future Summit Participants were also asked their views about the Internet and entertainment, information and community.

91% agreed "*To me the Internet is far more an information tool than an entertainment tool*".

61% agreed that "*The Internet has gone from being a source of information to a source of community*".

36% said the Internet is their "*main source of information*", second only to newspapers (40%).

When asked which daily newspaper were a 'must read', the Australian Financial Review topped the list at 44% with The Australian at 33%. However, on the weekend, The Australian (44%) topped the list with the Australian Financial Review at only 20%.

Appendix 1 *"What do you think is the most important problem facing the world / Australia today?"*

Most Important Problem Facing Australia / The World	THE WORLD			AUSTRALIA		
	Future Summit Participants, 2007	Future Summit Participants, 2006	Australians, 2006	Future Summit Participants, 2007	Future Summit Participants, 2006	Australians, 2006
	%	%	%	%	%	%
Terrorism	4	4	20	-	-	6
Wars and conflicts	6	2	11	1	-	2
Security, Safety	-	2	1	-	-	1
Relations with other countries	-	6	-	-	3	3
Total Terrorism/Wars/Security/Safety	**10**	**14**	**32**	**1**	**3**	**12**
Economic problems	2	2	1	2	9	2
Industrial relations reforms	-	-	-	-	-	6
Poverty, The gap between rich and poor	14	21	16	1	6	4
Unemployment	-	-	*	-	1	5
Over-population	3	2	1	-	-	*
Insufficient population growth/Ageing population	1	-	-	3	3	-
Globalisation/Fairer world trade	1	2	1	1	2	2
Infrastructure	-	-	-	-	3	1
Total Economic Issues	**21**	**27**	**19**	**7**	**24**	**20**
Water conservation	1	1	1	14	5	3
Climate Change / Global warming	34	18	5	26	9	1
Famine	1	-	2	-	-	-
Drought	-	-	-	6	-	-
Management / Mismanagement of Natural Resources	2	-	-	1	-	-
Other environmental issues	9	7	6	9	4	4
Total Environmental Issues	**47**	**26**	**14**	**56**	**18**	**8**
Petrol prices	-	-	*	-	-	1
Energy crisis	1	3	1	-	2	*
Depletion of fossil fuels	1	2	*	-	2	*
Total Energy Crisis/Depletion of Fossil Fuels/Petrol Prices	**2**	**5**	**1**	**-**	**4**	**1**
Bird flu	-	-	1	-	-	-
Other health issues	1	1	3	1	-	9
Total Health Issues	**1**	**1**	**4**	**1**	**-**	**9**
Corruption	-	2	*	-	-	*
Greed, Materialism	1	1	3	1	1	*
Drugs and drug abuse	-	-	2	-	-	2
Educational issues	1	-	1	3	2	2
Crime	-	-	1	-	-	2
Youth issues	-	-	1	-	-	2
Anger/Violence/Aggression	-	-	1	-	-	*
Social apathy/Family breakdowns/ Selfishness/Moral decline	-	1	2	-	12	3
Lack of social cohesion / social disconnection	1	-	-	3	-	-
Indigenous disadvantage	-	-	-	3	4	-
Cultural development	-	-	-	-	1	-
Total Social Issues	**3**	**4**	**11**	**10**	**20**	**11**
Government, Politics, Political system	1	9	2	3	15	7
Religion, Religious fundamentalism	3	5	5	-	-	2
Human rights	1	-	*	-	-	1
Refugees, Refugee and asylum problems	-	-	-	-	-	2
Immigration, Immigration policy	-	-	1	1	2	5
Intolerance	-	2	3	1	1	3
Racism/Racial tensions	-	-	2	-	1	2
Multiculturalism	-	1	*	-	2	2
John Howard/Howard government	-	-	-	-	1	1
Total Government, Human Issues	**5**	**17**	**13**	**5**	**22**	**25**
Other	11	6	3	20	9	8
Can't say	-	-	3	-	-	6
Total	**100**	**100**	**100**	**100**	**100**	**100**

Appendix 2 *"What do you think are the most important environmental issues facing the world / Australia today?"*

Important Environmental Issues Facing the world / Australia	THE WORLD			AUSTRALIA		
	Future Summit Participants, 2007	**Future Summit Participants, 2006**	**Australians, 2006**	**Future Summit Participants, 2007**	**Future Summit Participants, 2006**	**Australians, 2006**
	%	**%**	**%**	**%**	**%**	**%**
Global warming	29	44	35	13	20	13
Greenhouse effect, Greenhouse gases	10	11	15	5	2	7
Climate change	34	15	5	26	12	3
Ozone layer	-	1	5	1	3	2
Melting of polar ice caps	-	2	3	-	-	*
Extinction, Loss of species	4	15	2	2	8	2
Reduction in habitable land	1	1	1	1	1	2
Introduction of non-native species	-	-	-	-	-	1
El Nino	-	-	*	-	-	*
Total Global Warming Issues	**71**	**71**	**56**	**44**	**37**	**26**
Pollution (unspecified)	4	6	14	1	4	10
Air pollution	1	1	8	-	2	6
Water pollution	1	1	5	1	1	5
Cars, Exhaust from cars	-	-	3	1	-	3
Smog	-	-	*	-	-	*
Total Pollution	**5**	**8**	**27**	**3**	**6**	**22**
Recycling	-	1	3	-	2	4
Nuclear waste	-	1	2	1	-	2
Toxic waste	-	1	*	-	2	1
Landfill	-	1	1	-	-	1
Plastic bags	-	-	1	-	-	1
Total Waste Management	**-**	**3**	**7**	**1**	**3**	**7**
Water conservation, Water management	10	14	8	40	43	27
Erosion	1	1	*	2	2	*
Salinity	-	2	1	1	17	11
Total Water Management Issues	**11**	**16**	**9**	**41**	**53**	**35**
Total Water Management Issues (Inc. Drought)	**11**	**16**	**12**	**49**	**55**	**43**
Drought	-	-	4	7	5	12
Hurricanes, Cyclones	-	-	1	-	-	*
Famine	-	-	1	-	-	-
Bushfires	-	-	-	-	-	*
Earthquakes	-	-	*	-	-	-
Flooding	-	-	*	-	-	-
Tsunami, Tidal waves	-	-	-	-	-	-
Total Natural Disasters	**-**	**-**	**7**	**7**	**5**	**13**
Energy crisis, Depletion of fossil fuels	3	12	10	3	9	6
Depletion of natural resources	6	7	9	3	6	6
Finding renewable energy resources	-	4	-	-	6	-
Need for environmentally friendly energy sources	1	-	-	3	-	-
Total Depletion of Resources	**9**	**21**	**18**	**9**	**18**	**12**
Over population	3	4	4	1	-	2
Urbanisation	-	2	*	1	3	1
Total Over Population / Urbanisation	**3**	**5**	**4**	**2**	**3**	**3**
Logging forests or deforestation	3	11	11	2	10	15
Mining	1	-	-	1	-	2
Bird flu	-	-	*	1	-	-
Other	**15**	**30**	**9**	**15**	**10**	**10**
Can't say	**-**	**1**	**8**	**-**	**7**	**9**
None	**-**	**-**	**-**	**-**	**-**	**2**

(Respondents could give more than one issue)
* Less than 1%

Appendix 3

Life Satisfaction
Individualism
Quality Expectations

Price Expectations
Innovation
Progressiveness

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VALUES SEGMENTS

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

Visible Achievement — 17%

Something Better — 6%

Basic Needs — 3%

Real Conservatism — 5%

Traditional Family Life — 20%

Conventional Family Life — 12%

Young Optimism — 7%

Socially Aware — 14%

Look At Me — 12%

Fairer Deal — 4%

Australasia 2000

Roy Morgan Values Segments *(developed in conjunction with Colin Benjamin of The Horizons Network)*

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

Australasia 2010

Roy Morgan Values Segments *(developed in conjunction with Colin Benjamin of The Horizons Network)*

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