

Australia's
SHOPPING INTENT REPORT



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1. Introduction

Directional Insights is a research consultancy specialising in the design and delivery of innovative research for retail, shopping centres and other property facilities, including residential, leisure and recreational complexes across Australia and New Zealand.

We have the knowledge, experience and resources to holistically design, manage and deliver your research needs. We have extensive experience in managing customer survey studies, telephone surveys, online surveys, focus groups, in-depth interviews and executive interviews.

AMP Capital Shopping Centres has 41 shopping centres across Australia and New Zealand, AMP Capital Shopping Centres is Australia's second largest regional shopping centre owner, developer, manager and designer.

The largest AMP Capital Shopping Centres, in size and annual turnover, per state are Warringah Mall (New South Wales), Pacific Fair (Queensland), Knox Shopping Centre (Victoria) and Garden City Booragoon (West Australia).

Balancing the needs of its retailers with those of the community, each of AMP Capital Shopping Centres contributes to the community by supporting local schools, charities and organisations.

This report, "*RRP*" follows the February 2009 report, "*Victory of the Bargain*". This report not only examines how the current economic climate is changing the way we spend, but compares and tracks changes in consumer behaviour to earlier in the year.

The main source for this report was a nation wide on-line survey of n=1,000 Australians.



The sample had quotas set by gender, age and location by state in order to be representative of the Australian population.

The original “***Victory of the Bargain***” survey was undertaken the weekend prior to the announcement of the significant stimulus package by the Australian Government, and also before the interest rate cut was announced by the Reserve Bank and passed on by the major banks. This report re-visits the market in order to gauge if the economic policies and climate have changed consumer behaviour.

In order to gain a further understanding of recent changes to expenditure, we also asked Australians what they were and were not prepared to give up when shopping in the current economic climate.

In these changing times, knowing what customers are thinking and doing at your local centre or in your portfolio is more critical than ever, so your retail plan and marketing campaigns can maximise their value.

Customers are changing their shopping patterns, how are they changing at your centre? ***Directional Insights*** can help you find out with Customer Surveys, Focus Groups, In-depth Interviews and Vox Pop. For a discussion about your research needs or more information about our services, please contact:

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2. *The Results – An Overview*

Australians were asked how they are changing their spending habits to cope with the current economic climate.

Are they spending more, less or about the same as usual compared to this time last year? Nineteen spending categories were listed including:

- Take home food and groceries
- Alcohol for home consumption
- Eating out in cafes and restaurants
- Buying take away food
- Going out to theatres, movies and bars
- Clothing, shoes and accessories
- Big ticket items like furniture and large electrical goods
- Local Australian holidays
- Overseas holidays
- Household goods like TVs, small electrical, kitchenware, homewares
- Hairdressers, beautician, nail bar, massage
- Purchases like beauty products, make up, perfume, general chemist products
- Technology purchases like mobile phones, computers, gaming consoles etc
- Gifts
- General items like books, newsagency etc
- General items like optical, shoe repair, clothing alternations, dry cleaning
- Lotto, Lottery tickets etc
- Home entertainment like DVDs, Video Hire, Video Games, CDs, traditional board games
- Home entertaining eg friends for dinner, lunch or coffee



Across the spend categories, Australians are spending less on the majority of the categories tested. However, when these results are compared to the February 2009 results, the proportion of Australians spending less has decreased across all of the categories. The biggest change has occurred in the Eating out in cafes and restaurants category, where 57% of Australians were spending less in February compared to 46% currently.

A small proportion are still spending more, with 26% of Australians interviewed spending more on take home food (i.e. groceries, fresh food) as compared to this time last year. This is the only spend category where a higher proportion are spending more as compared to those spending less, with only 16% of Australians are spending less on this category.

Changes to the spend profile between genders is more noticeable for Females, which was also evident in the February report. A higher proportion of Females are spending less than Males across a majority of the spend categories, with the exception of alcohol for home consumption and overseas holidays, where the results are similar for both Males and Females.

As Females account for 70% of shoppers in shopping centres and even more of the spend, understanding their needs is more important than ever.



Changes by Spend Category

Spend Category	Spending Less	Spending the same as usual	Spending More	Don't spend on this category
Eating out in cafes and restaurants	46%	41%	6%	8%
Buying take away food	46%	41%	7%	6%
Big ticket items like Furniture and Large Electrical e.g. lounges, fridges	45%	34%	6%	14%
Clothing shoes and accessories	43%	49%	6%	2%
Household goods like TVs, Small Electrical, Kitchenware, Homewares	41%	44%	7%	8%
Going out to theatres, movies and bars	39%	42%	6%	13%
Technology purchases like mobile phones, computers, gaming consoles e.g. Xbox, Wii, and Music systems like iPods/ MP3 players	38%	42%	9%	11%
Gifts	37%	54%	6%	3%
General items like books, newsagency etc	36%	52%	5%	7%
Home entertainment like DVDs, Video Hire, Video Games, CDs, traditional board games	36%	43%	8%	13%
Purchases like beauty products, make up, perfume, general chemist products	34%	50%	4%	11%
Hairdressers, beautician, nail bar, massage	33%	48%	4%	15%
General items like optical, shoe repair, clothing alterations, dry cleaning	33%	51%	4%	13%
Overseas Holidays	31%	24%	10%	36%
Home entertaining e.g. friends for dinner, lunch or coffee	30%	54%	9%	8%
Local Australian Holidays	30%	44%	11%	15%
Alcohol for home consumption	29%	43%	9%	19%
Lotto, Lottery Tickets etc	27%	45%	9%	20%
Take home food and groceries	16%	57%	26%	1%

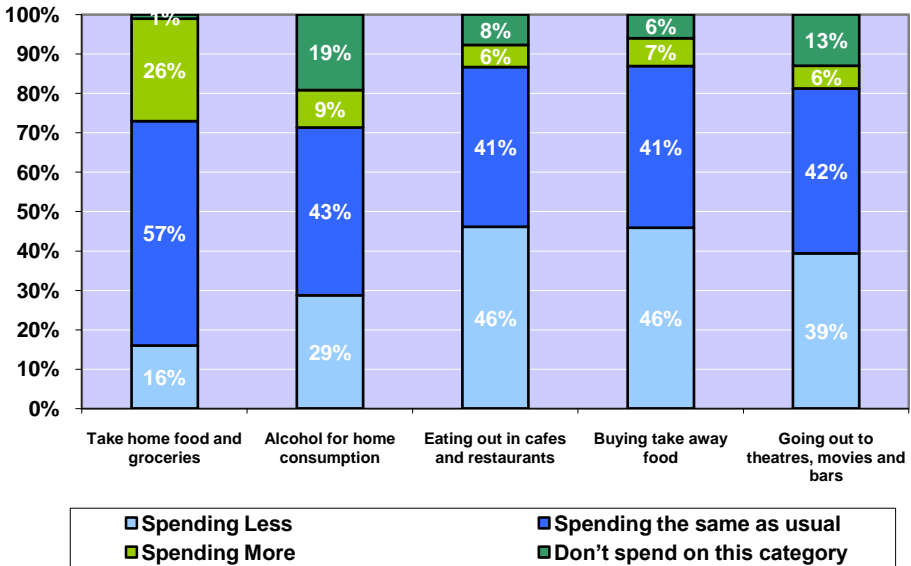
Spend Category Changes – February 2009 to July 2009 Comparison

	Spending Less		Spending the Same as Usual		Spending More		Don't spend on this category	
	Feb-09	Jul-09	Feb-09	Jul-09	Feb-09	Jul-09	Feb-09	Jun-09
Eating out in cafes and restaurants	57%	46%	32%	41%	3%	6%	8%	8%
Buying take away food	54%	46%	35%	41%	3%	7%	8%	6%
Big ticket items like Furniture and Large Electrical e.g. lounges, fridges	53%	45%	31%	34%	4%	6%	12%	14%
Clothing shoes and accessories	50%	43%	45%	49%	2%	6%	3%	2%
Household goods like TVs, Small Electrical, Kitchenware, Homewares	45%	41%	43%	44%	4%	7%	9%	8%
Going out to theatres, movies and bars	45%	39%	34%	42%	3%	6%	17%	13%
Technology purchases like mobile phones, computers, gaming consoles e.g. Xbox, Wii, and Music systems like iPods/ MP3 players	48%	38%	36%	42%	5%	9%	10%	11%
Gifts	42%	37%	53%	54%	3%	6%	3%	3%
General items like books, newsagency etc	43%	36%	50%	52%	2%	5%	5%	7%
Home entertainment like DVDs, Video Hire, Video Games, CDs, traditional board games	-	36%	-	43%	-	8%	-	13%

Spend Category Changes – February 2009 to July 2009 Comparison [continued]

	Spending Less		Spending the Same as Usual		Spending More		Don't spend on this category	
	Feb-09	Jul-09	Feb-09	Jul-09	Feb-09	Jul-09	Feb-09	Jun-09
Purchases like beauty products, make up, perfume, general chemist products	41%	34%	45%	50%	2%	4%	12%	11%
Hairdressers, beautician, nail bar, massage	40%	33%	44%	48%	1%	4%	15%	15%
General items like optical, shoe repair, clothing alterations, dry cleaning	36%	33%	53%	51%	2%	4%	10%	13%
Overseas Holidays	32%	31%	25%	24%	4%	10%	38%	36%
Home entertaining e.g. friends for dinner, lunch or coffee	-	30%	-	54%	-	9%	-	8%
Local Australian Holidays	37%	30%	42%	44%	6%	11%	15%	15%
Alcohol for home consumption	39%	29%	40%	43%	3%	9%	18%	19%
Lotto, Lottery Tickets etc	32%	27%	42%	45%	3%	9%	22%	20%
Take home food and groceries	22%	16%	67%	57%	10%	26%	0%	1%

3. Changes by Food and Out of Home Entertainment



Take Home Food and Groceries

One of the most commonly purchased spend categories is take home food and groceries. Currently, 57% of Australians interviewed are still spending about the same as usual (compared to this time last year). 16% are spending less; with a higher proportion of Females reducing their food spend as compared to Males (21% and 12% respectively). However, when this is compared to the February results, we see a shift to spending more on take home food and groceries as the proportion of Australians spending more on this category has increased from 10% to 26%.



When analysed by age, a higher proportion of 45-54 year olds are spending less at 19%, a decrease from 26% in February, but 23% are spending more. A further 19% of Australians aged 35-44 years are spending less on take home food and groceries but again 27% are spending more. Overall, all age groups are spending more on take home food and groceries compared to those who are spending less.

Alcohol for Home Consumption

43% of Australians interviewed are still spending about the same as usual on alcohol for home consumption. However, 29% are spending less. A comparison can not be made to the February data as this category changed from just alcohol to now specifying home consumption. There is little difference between the genders in terms of reducing their alcohol spend at 29% for each Males and Females. However, 11% of Males are increasing alcohol consumption compared to only 8% of Females.

When analysed by age, a higher proportion of 35-44 year olds are spending less on alcohol at 31% compared to only 13% spending more. 15% of Australians interviewed aged 18-24 years are spending more on this category compared to this time last year with double this number spending less. Overall, all age groups are spending less on alcohol for home consumption as compared to those who are spending more.

Eating out in Cafes and Restaurants

Currently, 46% of Australians interviewed are spending less on eating out in cafes and restaurants, a decrease from 57% in February. However, 41% are still spending about the same, also up from 32%. There was a slightly higher proportion of Females reducing their spend as compared to Males at 49% and 44% respectively, both of which have decreased.

Across all age groups there are more Australians spending less than those spending more, particularly Australians aged 35-44 years.



A higher proportion of 35-44 year olds are spending less on eating out in cafes and restaurants at 56%, a slight fall from the 62% of 35-44 year olds are spending less in February. Only 2% are spending more.

Buying Take Away Food

41% of respondents interviewed are still spending about the same as usual on take away food. However, 46% are spending less, a lower proportion compared to the February results where 54% were spending less. A higher proportion of Females are reducing their take away food spend at 53%, compared to 39% of Males.

When analysed by age, a higher proportion are spending less across all of the age brackets as compared to spending more. 56% of 35-44 year olds are spending less on take away food, with only 4% spending more. This is followed by Australians aged 55-64 at 49% spending less and only 2% spending more. However, for 18-24 year olds there is a major departure from the norm with 38% spending less but a high 24% spending more.

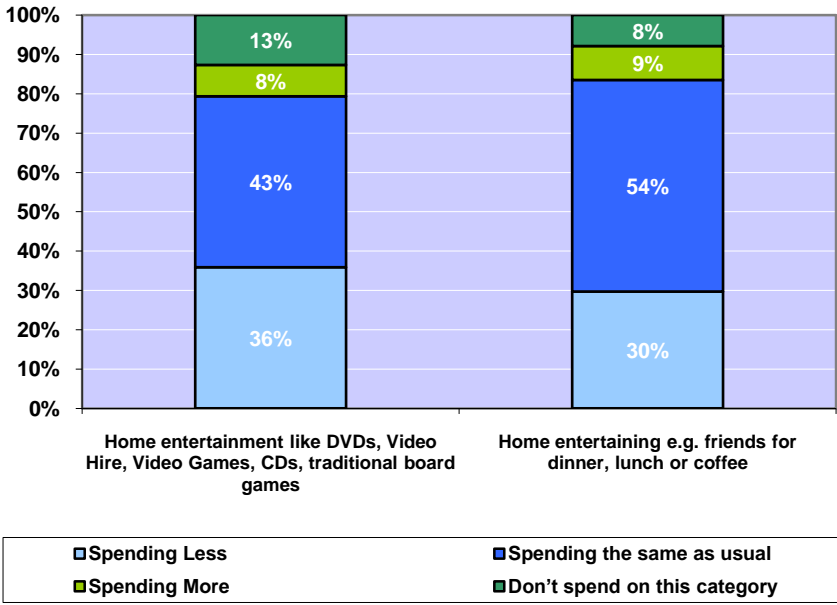
Going Out to Theatres, Movies and Bars

42% of Australians interviewed are still spending about the same as usual on going out to theatres, movies and bars, up from 34% in February. However, 39% are spending less in this purchase category when compared to this time last year, a decrease from 45% in February. A similar proportion of Females are reducing their spend on going out at 41%, compared to 38% of Males.

A higher proportion of 35-44 year olds are spending less on going out at 48%, down from 54%, followed by 25-34 year olds at 40%, down from 46%. 33% of respondents aged over 65 years are not spending on this category, reflective of the February results. Overall by age group there are more Australians cutting back their spending than increasing on this category. However, whilst 31% of 18-24 year olds are reducing their spend on this category, 14% are increasing their spend, the only double digit increase by age groups.



4. Changes by In Home Entertainment



Home Entertainment Like DVDs, Video Hire, Video Games, CDs, Traditional Board Games

43% of Australians interviewed are still spending about the same as usual on home entertainment like DVDs, video hire, CDs and traditional board games. However, 36% are spending less. A comparison cannot be made to the February data as this category was not tested. There is some difference between the genders in terms of reducing their spend on home entertainment at 39% for Females and 32% for Males.



When analysed by age, a higher proportion of 35-44, 45-54 and 55-64 year olds are spending less on in home entertainment at 40% each. 55% of Australians interviewed aged 18-24 years are spending the same as usual on this category compared to this time last year. However, 31% of Australians aged over 65 year olds are not spending on this category. Overall across age groups Australians are more likely to be spending less than more on this category, and after the age of 45 years an increasing number of Australians do not spend on this category.

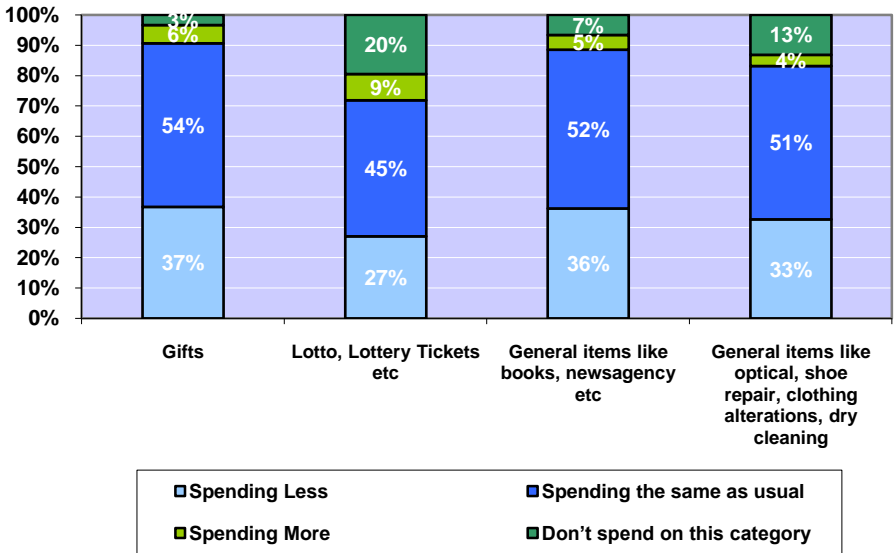
Home Entertaining e.g. Friends for Dinner, Lunch or Coffee

Currently, 30% of Australians interviewed are spending less on home entertaining e.g. friends for dinner, lunch or coffee. However, the majority are still spending about the same, at 54%. A comparison cannot be made to the February data as this category was not tested. There was a higher proportion of Females reducing their spend as compared to Males at 35% and 24% respectively.

A higher proportion of 35-44 year olds are spending less on home entertaining at 34%, followed by 32% of 45-54 year olds.



5. Changes by General Items



Gifts

54% of Australians interviewed are still spending about the same as usual on gift purchases, reflective of the February results. However, 37% stated they were spending less, a decrease from 42% spending less in February this year. A higher proportion of Females are reducing their spend on gift purchases at 41%, compared to 34% of Males.

In terms of reducing spend on gifts, a higher proportion of 35-44 year olds are spending less on gift purchases at 42%, followed by 25-34 year olds at 40%, with only 5% and 7% respectively spending more.

12% of Australians interviewed aged 18-24 years are spending more on gift purchases, up from 8% earlier this year. However, 27% are spending less.

Lotto, Lottery Tickets etc

Currently, 27% of Australians interviewed are spending less on lotto and lottery tickets, a decrease from 32%. However, 45% are still spending about the same with a further 9% spending more on lotto and lottery tickets. There was a higher proportion of Females reducing lotto and lottery ticket spend as compared to Males at 31% and 23% respectively, both of which have decreased from the February results.

A higher proportion of 35-44 year olds are spending less on lotto and lottery tickets at 32%, however 9% are spending more. 31% of over 65 year olds are also spending less with only 4% spending more. This has shifted from the 45-54 years spending less in February, from 37% to 23% currently.

General Items like Books, Newsagency etc.

52% of respondents interviewed are still spending about the same as usual on general items like books, newsagency etc. However, 36% are spending less, a fall from 43% spending less in February. A higher proportion of Females are reducing their general item spend at 44%, compared to 29% of Males. The proportion of Males spending less on this category has decreased from 37%. The majority of Australian Males stated they are spending about the same as usual at 61%.

When analysed by age, a higher proportion of 35-44 year olds and over 65 year olds are spending less on general items like books, newsagency etc. at 40% each. This is followed by 45-54 year olds at 36%, a decrease from the February results where this age group had the highest proportion of residents spending less at 49%. 9% of residents aged 55-64 years do not spend on this purchase category.



Overall across the age groups there are more Australians reducing their spend on general items like books and newsagent etc. than those increasing their spend.

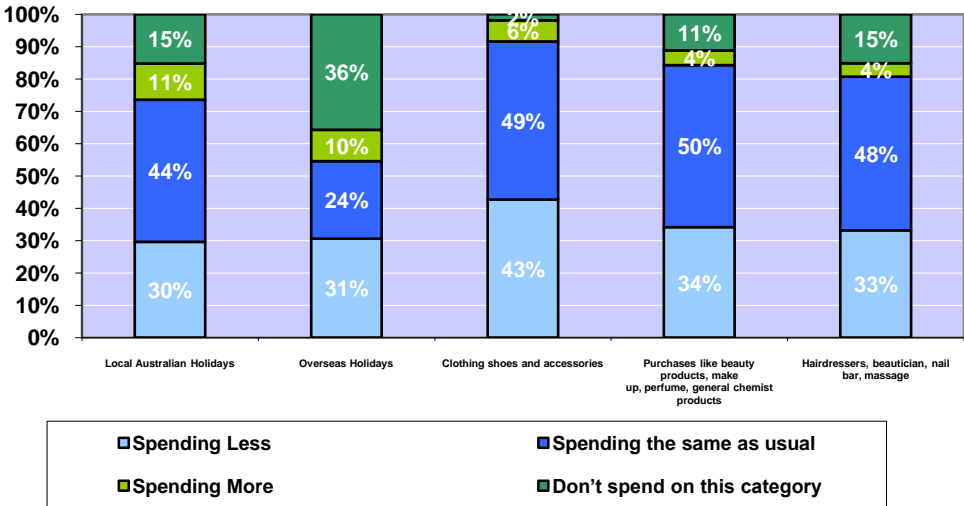
General Items like Optical, Shoe Repair, Clothing Alterations, Dry Cleaning

Currently, 33% of Australians interviewed are spending less on general items like optical, shoe repair, clothing alterations, dry cleaning, which has slightly decreased from 36% in February this year. However, the majority are still spending about the same at 51%, somewhat reflective of the February results. There was a fairly similar proportion of Females reducing their spend as compared to Males at 35% and 31% respectively. The proportion of Females reducing their spend on this category has decreased from 41% earlier this year.

37% of 45-54 year olds are spending less on general items like optical, shoe repair, clothing alterations, dry cleaning, along with 36% of over 65 year olds.

Overall across the age groups there are more Australians reducing their spend on this category than those increasing their spend.

6. Changes on Holidays, Apparel and Beauty/Personal Services Spend



Local Australian Holidays

44% of Australians interviewed are still spending about the same as usual on local Australian Holidays, somewhat reflective of the February results. 30% stated they were spending less, a 7% decrease from the February report. A slightly higher proportion of Females are reducing their spend on local Australian holidays at 33%, compared to 27% of Males, both of which have decreased.

A higher proportion of 35-44 year olds and 45-54 year olds are spending less on local Australian holidays at 35% each.

Conversely, 14% of Australians interviewed aged 18-24 years and 25-34 years are spending more on local Australian holidays. However, both of these age groups are cutting back at 27% and

31% respectively. 23% of residents aged over 65 years do not spend on local Australian holidays. Again, across the age groups more Australians have reduced their spend on local Australian holidays compared to those who have increased their spend.

Overseas Holidays

Currently, 31% of Australians interviewed are spending less on overseas holidays, reflective of the February report. However, 24% are still spending about the same with a further 10% spending more on overseas holidays, up from 4%. Overall, 36% of Australians interviewed do not spend on this category. There was a similar proportion of Males reducing spend on overseas holidays as compared to Females at 30% and 31% respectively.

All of the age groups are spending less on overseas holidays, reflecting the average. However, 18% of Australians interviewed aged 18-24 years are spending more on this category, up from 7% earlier in the year, with 25% spending less.

Clothing, Shoes and Accessories

49% of respondents interviewed are still spending about the same as usual on apparel items such as clothing, shoes and accessories, a slight increase from 45% in February. However, 43% are spending less, a decrease from 50%. A higher proportion of Females are reducing their apparel spend at 48%, compared to 37% of Males, both of which are lower than the February results.

When analysed by age, a higher proportion are spending less across the majority of the age brackets. 48% of 45-54 year olds are spending less on clothing, shoes and accessories and only 4% are spending more. However, 12% of 18-24 year olds interviewed stated they are currently spending more on clothing, shoes and accessories with 35% spending less.

Purchases like Beauty Products, Make Up, Perfume, General Chemist Products

Half of Australians interviewed are still spending about the same as usual on purchases like beauty products, make up, perfume, general chemist products. However, 34% of respondents are spending less, 7% less than the February report. A higher proportion of Females are reducing their spend on purchases like beauty products, make up, perfume, general chemist products at 41%, compared to 27% of Males. 16% of Males don't spend on these items compared to 6% of Females.

A higher proportion of over 65 year olds are spending less on purchases like beauty products, make up, perfume, general chemist products at 40%, followed by 45-54 year olds at 36%, a decrease from 43%. Across all age groups more Australians are spending less in this category compared to those who are spending more.

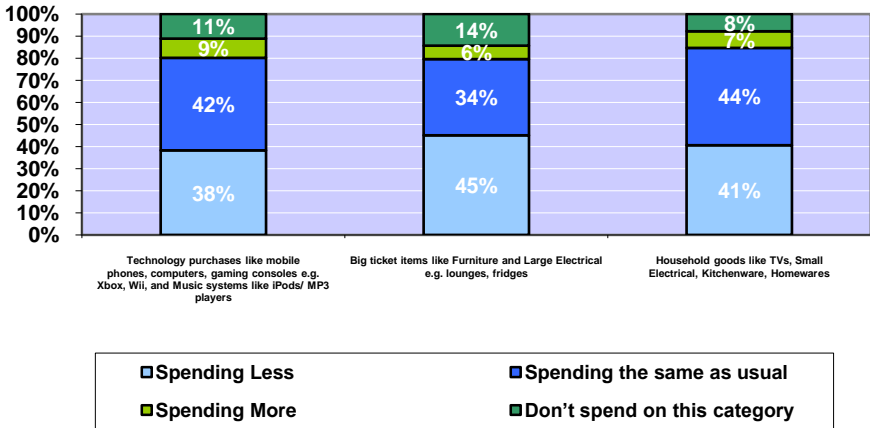
Hairdressers, Beautician, Nail Bar, Massage

Currently, 33% of Australians interviewed are spending less on hairdressers, beautician, nail bar and massage, down 7% from 40% in February. However, 48% are still spending about the same with a further 4% spending more on hairdressers, beautician, nail bar and massage. Overall, 15% of Australians interviewed do not spend on this category, which has remained consistent. There was a higher proportion of Females reducing spend on hairdressers, beautician, nail bar and massage as compared to Males at 40% and 26% respectively, both of which are lower now compared to February. 20% of Males don't spend on these items compared to 11% of Females.

A higher proportion of 35-44 year olds are spending less on purchases like hairdressers, beautician, nail bar and massage at 40%, followed by 18-24, 25-34 and 45-54 year olds at 34% each. 8% of Australians interviewed aged 25-34 years are spending more on this category but 44% are spending the same as this time last year.



7. Changes in Technology, Household Items and Home Entertainment Spending



Technology Purchases like Mobile Phones, Computers, Gaming Consoles e.g. Xbox, Wii, and Music Systems like iPods/MP3 Players

42% of Australians interviewed are still spending about the same as usual on technology purchases, a rise from 36%. 38% of Australians are reducing their spend on technology, a decrease from 48% spending less in February. A higher proportion of Females are reducing their spend on technology purchases at 41%, compared to 35% of Males.

A higher proportion of 45-54 year olds and 55-64 year olds are spending less on technology purchases at 41% each, with 6% of 45-54 year olds and 10% of 55-64 year olds spending more. 16% of respondents aged 18-24 years are spending more on this category, an increase of 5%, but 34% are still spending less.

Big Ticket Items like Furniture and Large Electrical e.g. Lounges, Fridges

Currently, 45% of Australians interviewed are spending less on big ticket items like furniture and large electrical e.g. lounges, fridges, down from 53% spending less in February. However, 34% are still spending about the same with a further 6% spending more on big ticket items. Overall, 14% of Australians interviewed do not spend on this category. There was a slightly higher proportion of Females reducing spend on big ticket items as compared to Males at 47% and 43% respectively.

A higher proportion of 35-44 year olds are spending less on big ticket items at 53%, down from 58%, followed by 55-64 year olds at 50%. Respondents aged 25-34 years are spending more on this category at 10%, up 4% from earlier in the year, but 44% are spending less. Across all age groups more Australians are spending less on this category compared to those who are spending more.

Household Goods like TVs, Small Electrical, Kitchenware, Homewares

44% of respondents interviewed are still spending about the same as usual on household goods like TVs, small electrical, kitchenware and homewares, reflective of the February results. However, 41% are spending less and 7% are spending more. A higher proportion of Females are reducing their spend on household goods like TVs, small electrical, kitchenware and homewares at 43%, compared to 39% of Males.

When analysed by age, a higher proportion of 35-44 year olds and over 65 years are spending less on household goods like TVs, small electrical, kitchenware and homewares at 46% and 45% respectively. 16% of respondents aged 18-24 years do not spend on this purchase category, an increase of 4%. However, 8% of 18-24 year olds interviewed stated they are currently spending more on household goods like TVs, small electrical, kitchenware and homewares, compared to 34% who are spending less.





8. *Cut Backs and Essential Items*

Australians were also asked what they are prepared to cut back on in order to cope with the current economic climate in order to save money and what are they unwilling to give up? 27 spending areas were tested including:

- Fast Food e.g. KFC, McDonalds, Pizza Hut, Dominos, Subway etc
- Essential beauty treatments (e.g. waxing)
- Having your hair cut or coloured at a trusted hairdresser
- Take away food e.g. local Thai, Indian, Chinese etc
- New/fashionable clothing to keep up with current trends
- Quality fitting clothes that suit my needs
- Trusted brand of baby care products e.g. Huggies nappies, Johnson products
- Trusted brand of food and grocery products e.g. Cadbury chocolate or Moccona coffee
- Trusted beauty products (e.g. Shiseido or MAC make up)
- Good quality/branded sporting equipment and shoes for my child / children's needs
- Good quality/branded sporting equipment and shoes for myself
- Quality meat and vegetables (from the butcher/Green Grocer)
- Quality wine/beer/spirits (e.g. Huntington Estate Wine, Cascade, Jack Daniels)
- Dinner out with my partner
- Dinner out with my friends
- My mobile phone allowance
- Cigarette smoking
- Private health/medical insurance e.g. HCF, Medibank Private
- Insurance for the house/car/boat
- Quality/brand label pet food
- Home entertainment like video hire, DVDs, CDs

- Buying new homewares to keep up with current trends
- Stopping for a coffee/tea whilst out of the house e.g. café or coffee shop
- Wardrobe items like a good fitting pair of jeans
- Pay TV e.g. Foxtel, Austar
- Leisure items like books, music, magazines
- A small 'treat' for me while shopping such as massage, cappuccino, cheap DVD etc

In terms of what Australian residents are not prepared to give up, quality meat and vegetables and insurance for the house/car/boat top the list at 79% each.

Across the categories tested, only six had a higher proportion of residents stating they will give up this category, compared to those who will not. These categories are:

- Take away food
- Fast food
- Trusted beauty products
- Essential beauty treatments
- New/fashionable clothing to keep up with current trends
- Buying new homewares to keep up with current trends

Spend Category	Wont Give Up	Will Give Up	Don't spend on this category
Quality meat and vegetables	79%	14%	7%
Insurance for the house/car/boat	79%	9%	12%
My mobile phone allowance	70%	21%	9%
Trusted brand of food and grocery products	65%	29%	6%
Private health/medical insurance	53%	13%	34%
Quality fitting clothes that suit my needs	52%	28%	19%
Dinner out with my friends	51%	33%	16%
Dinner out with my partner	49%	25%	25%
Wardrobe items like a good fitting pair of jeans	49%	34%	17%
Having your hair cut or coloured at a trusted hairdresser	48%	27%	25%
A small 'treat' for me while shopping such as massage, cappuccino, cheap DVD etc	47%	33%	19%
Leisure items like books, music, magazines	45%	40%	15%
Stopping for a coffee/tea whilst out of the house	42%	38%	21%
Take away food e.g. local Thai, Indian, Chinese etc	41%	43%	16%
Fast Food	39%	43%	18%
Home entertainment like video hire, DVDs, CDs	38%	38%	24%
Quality wine/beer/spirits	37%	31%	32%
Quality/brand label pet food	37%	20%	43%
Good quality/branded sporting equipment and shoes for myself	32%	30%	39%
Pay TV e.g. Foxtel, Austar	29%	16%	55%
Good quality/branded sporting equipment and shoes for my child / children's needs	24%	15%	60%
Trusted beauty products	21%	27%	52%
Essential beauty treatments (e.g. waxing)	19%	26%	55%
New/fashionable clothing to keep up with current trends	19%	46%	35%
Cigarette smoking	17%	14%	70%
Buying new homewares to keep up with current trends	16%	47%	37%
Trusted brand of baby care products	16%	10%	74%

Quality Meat and Vegetables : For quality meat and vegetables, the proportion of both Males and Females not prepared to give up or make cut backs in this area is reflective of the total. However, this does change across the age profiles, with 88% of residents aged 55-64 years not prepared to cut back in this area compared to 64% of residents aged 18-24 years.

Insurance for the house/car/boat : This category follows a similar profile to quality meat and vegetables, with little difference between the genders, but variation across the age profiles. Again, 88% of residents aged 55-64 years are unwilling to cut back in this area, compared to 60% of Australians aged 18-24 years. However, 26% of those aged 18-24 years do not spend on this category.

Mobile Phone Allowance : Overall 70% of Australians are not prepared to give up their mobile phone allowance in order to better cope with the current economic climate. As would be expected, this was highest for the 18-24 year olds at 75%. Again, this is steady across the genders.

Trusted Brand of Food and Grocery Products : 65% of Australians are not prepared to give up or make cut backs with trusted brand food and grocery products. There is some variation across the age groups, with 72% of residents aged 55-64 years not willing to cut back, as compared to 58% of residents aged 18-24 years.

Private Health/Medical Insurance : Just over half of Australians are not prepared to give up their private health/medical insurance. However, 34% of Australians do not spend on this category. In terms of the gender profiles, there is little difference. Residents aged 18-24 years and 35-44 years are more likely to give up private health at 18% each. However, 50% for both of these age groups stated they were unwilling to give up this category.



Quality Fitting Clothes That Suit My Needs : Overall 52% of Australians are not prepared to give up quality fitting clothing in order to better cope with the current economic climate. This proportion is slightly higher for Male residents compared to Females at 54% and 50% respectively. Resident aged 25-34 years account for the highest proportion unwilling to give up spend in this area at 63%, compared to 44% of residents aged over 65 years.

Dinner Out With My Friends : Just over half of Australians are not prepared to give up dinner out with friends. However, 34% of Australians are prepared to give up this category. In terms of the gender profiles, Females are more likely to make cut backs in this area compared to Males at 36% and 31% willing to make a cut back respectively. Residents aged 18-24 years are more likely to not give up dinner out with friends at 62%.

Dinner Out With My Partner : Overall 49% of Australians are not prepared to give up dinner out with a partner in order to better cope with the current economic climate. Again, Females are more likely to make cut backs on this area compared to Males at 29% and 22% willing to cut back respectively. 32% of residents aged 35-44 years are willing to give up dinner out with a partner, followed by 28% of residents aged 25-34 years, however 51% each are unwilling to give up dinner out with their partner. 36% of residents aged over 65 years do not spend on this category.

Wardrobe Items Like A Good Fitting Pair of Jeans : 49% of Australians are not prepared to give up or make cut backs with wardrobe items like a good fitting pair of jeans. Females are more likely to cut back in this area with 36% stating they would give this up, however, 46% stated they are unwilling to make a cut back. There is some variation across the age groups, with 63% of residents aged 18-24 years not willing to cut back, as compared to 35% of residents aged over 65 years. Generally, the older we get the more willing we are to give up wardrobe items like a good fitting pair of jeans.



Having Your Hair Cut and Coloured By a Trusted Hairdresser :

Overall 48% of Australians are not prepared to give up this category in order to better cope with the current economic climate. As would be expected, this was highest for Females at 51% compared to 44% of Males. 34% of Males do not spend on this category, compared to 16% of Females. Residents aged 55-64 years and over 65 years are more unwilling to make cut backs in this area as compared to the other age profiles, at 58% and 56% respectively.

A Small Treat for Me While Shopping :

47% of residents are unwilling to make any cut backs in this area, whilst 33% will give up a small treat whilst shopping. The proportion of Females willing to give up this category is higher than Males at 38% and 28% respectively. 51% of residents aged 45-54 and 25-34 years are unwilling to give up this category.

Leisure Items Like Books, Music, Magazines :

Overall 45% of Australian residents are not prepared to give up leisure items like books, music or magazines in order to better cope with the current economic climate. Males are slightly more unwilling to give up this category with 48% stating they are not prepared to give up leisure items, compared to 43% of Females. 51% of residents aged 55-64 years are unwilling to give up this category, followed by 47% of residents aged 18-24 years.

Stopping For A Coffee/Tea Whilst Out of The House :

42% of Australians are not prepared to give up stopping for a coffee or tea whilst out of the house. However, 21% of residents do not currently spend on this area. There is some variation across the age groups, with 51% of residents aged 55-64 years not willing to cut back, as compared to 35% of residents aged 35-44 years. 29% of residents aged over 65 years do not spend on this category.



Take Away Food : 43% of residents are willing to make cut backs in this area, whilst 41% are unwilling to give up purchasing take away food e.g. local Thai, Indian, Chinese. The proportion of Females willing to give up this category is higher than Males at 47% and 38% respectively. 49% of residents aged 25-34 years and 47% of residents aged 18-24 years are unwilling to give up this category. 33% of residents aged over 65 years do not spend on this category, compared to only 7% of residents aged 18-24 years.

Fast Food : Again, 43% of residents are willing to give up fast food such as KFC, McDonalds, Pizza Hut, Dominos, Subway etc, whilst 39% are unwilling to give up purchasing this category. The proportion of Males unwilling to give up this category is higher than Females at 45% and 33% respectively. 51% of residents aged 18-24 years are unwilling to give up this category, followed by 50% aged 25-34 years. 46% of residents aged over 65 years do not spend on this category, compared to only 5% of residents aged 18-24 years. The older we get, the less likely we are to spend on this category.

Home Entertainment Like Video Hire, DVDs, CDs : Overall 38% of Australians are not prepared to give up home entertainment like video hire, DVDs and CDs in order to better cope with the current economic climate. This proportion is slightly higher for Male residents compared to Females at 42% and 35% respectively. Resident aged 25-34 years account for the highest proportion unwilling to give up spend in this area at 49%, compared to 21% of residents aged over 65 years. Over half of the residents aged over 65 years do not spend on this category.

Quality Wine, Beer and Spirits : 37% of residents are unwilling to make any cut backs in this area, whilst 31% will give up purchasing quality wine, beer and spirits. The proportion of Males unwilling to give up this category is higher than Females at 47% and 28% respectively. 44% of residents aged 25-34 and 43% of 45-54 years are unwilling to give up this category.



Quality/Brand Label Pet Food : Overall 37% of Australian residents are not prepared to give up purchasing quality/brand label pet food in order to better cope with the current economic climate. However, 43% of residents do not purchase this category. Females are more unwilling to cut back in this area compared to Males at 39% and 35% respectively. This was highest for the 45-54 year olds at 47%.

Good Quality/Branded Sporting Equipment and Shoes for Myself : 32% of residents are unwilling to make any cut backs in this area, whilst 29% will give up purchasing good quality/branded sporting equipment and shoes for myself. The proportion of Males unwilling to give up this category is higher than Females at 39% and 24% respectively. 40% of residents aged 25-34 and 37% of 18-24 year olds are unwilling to give up this category. 61% of residents aged over 65 years do not purchase this category.

Pay TV e.g. Foxtel, Austar : 29% of residents are unwilling to make any cut backs in this area, whilst 16% will give up pay TV. However, 55% of Australians interviewed do not spend on pay television. The proportion of Males willing to give up this category is similar to Females at 31% and 28% respectively. Residents aged 35-44 years are more unwilling to give up pay television at 35%. 65% of residents aged over 65 years do not spend on this category.

Good Quality/Branded Sporting Equipment and Shoes for My Child/Children's Needs : 25% of residents are unwilling to make any cut backs in this area, whilst 15% will give up purchasing good quality/branded sporting equipment and shoes for my child/children's needs. However, 60% of residents do not spend in this area. The proportion of Males unwilling to give up this category is slightly higher than Females at 28% and 21% respectively. 45% of residents aged 35-44 are unwilling to give up this category. 83% of residents aged over 65 years do not purchase this category, followed by 79% of residents aged 55-64 years.



Trusted Beauty Products : 27% of residents are willing to make cut backs in this area, whilst 21% are unwilling to give up purchasing trusted beauty products such as Shiseido or MAC make up. The proportion of Females willing to give up this category is higher than Males at 36% and 18% respectively. 64% of Males do not purchase this category. 27% of residents aged 25-34 years and 24% of residents aged 35-44 years are unwilling to give up this category. The older you get the less likely you are to spend on this category.

Essential Beauty Treatments : Overall 19% of Australian residents are not prepared to give up essential beauty treatments such as waxing in order to better cope with the current economic climate. However, 26% of residents are prepared to give up this category. A further 55% do not purchase this category. Females are more unwilling to cut back in this area compared to Males at 24% and 15% respectively. Residents aged 18-24 years and 25-34 year are more unwilling to give up this category at 29% and 28% respectively compared to other age groups.

New/Fashionable Clothing to Keep Up With Current Trends : Overall 46% of Australians are prepared to give up this category in order to better cope with the current economic climate. However, 19% are not willing to give up new/fashionable clothing to keep up with current trends. Males are more reluctant to give up this category as compared to Females at 23% and 16% respectively. 37% of Males do not spend on this category, compared to 33% of Females. Residents aged 18-24 years are more unwilling to make cut backs in this area as compared to the other age profiles, at 33%. Over half of the residents aged 55-64 years and over 65 years do not purchase this category. The older we get the less we spend on this category.



Cigarette Smoking : 17% of residents are willing to give up cigarette smoking in order to better deal with the current economic climate, whilst 14% will not give up. However, 70% of Australians interviewed do not spend on this category. The proportion of Males unwilling to give up this category is slightly higher than Females at 19% and 15% respectively. Residents aged 35-44 years are more unwilling to give up cigarette smoking at 23%. 87% of residents aged over 65 years do not spend on this category.

Buying New Homewares to Keep Up With Current Trends : 47% of residents are willing to make any cut backs in this area, whilst 16% will not give up purchasing new homewares to keep up with current trends. The proportion of Males unwilling to give up this category is higher than Females at 23% and 9% respectively. 58% of residents aged 35-44 and 51% of 25-34 years are willing to give up this category. 56% of residents aged over 65 years do not purchase this category.

Trusted Brand of Baby Care Products : Overall 16% of Australian residents are not prepared to give up purchasing trusted brand of baby care products e.g. Huggies nappies, Johnson products in order to better cope with the current economic climate. However, 74% of residents do not purchase this category. Females are more willing to cut back in this area compared to Males at 13% and 19% respectively. 28% of residents aged 25-34 years are unwilling to cut back on trusted brand baby care products.



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