



Roy Morgan Research Pty. Ltd.
A.B.N. 91 007 092 944
Quality System Certified to AS/NZS ISO 9001 : 94 Cert. No.6669
www.roymorgan.com

Background to Roy Morgan Research – founded by Roy Morgan in 1941

Roy Morgan Research, Australia's best known and longest established market research and public opinion polling company, was founded in 1941 by Roy Morgan. Since then, Roy Morgan Research has grown and prospered. While originally specialising in public opinion, corporate image and media measurement, the company has expanded to cover all aspects of market research information gathering whether by personal interviews, the telephone, self-administered or the Internet.

Roy Morgan Research is a truly international market research company and the provider of the world's most extensive and only true single source survey.

Today annual turnover is more than \$40 million, with offices in four mainland Australian States, Auckland, London, New York, Princeton and Indonesia.

During the 1990s there were many changes in the structure of the Australian Market Research Industry. AC Nielsen (USA) absorbed two of the larger ad hoc market research companies (Reark Research and AGB McNair), while Frank Small and Associates and Yann Campbell Hoare Wheeler were bought by overseas interests – Taylor Nelson Sofres (UK) and WPP (UK) respectively.

The Australian Market Research Industry now comprises mainly overseas-owned market research companies with Roy Morgan Research being the main exception. A proliferation of small local market research companies conducts mostly qualitative research.

Roy Morgan is Australia's best known public opinion and political polling organization. The Morgan Poll is Australia's only independent poll; i.e. not owned by a media. The results are published on www.roymorgan.com and by newspapers, magazines, television, the Internet and radio.

Roy Morgan International continues to be proudly Australian and is owned by the Morgan Family and senior employees with Gary Morgan as Executive Chairman and Michele Levine as Chief Executive Officer.

The largest single business is now [Roy Morgan Single Source](#), incorporating the Roy Morgan Readership Survey, Roy Morgan BrandPLANNER, MediaPLANNER, RadioPLANNER, TVPLANNER and CreativePLANNER. Other products include ASTEROID, The Worm, and Automotive, Tourism, Finance, Telecommunications, Utility, FMCG, QSR, Beverage, Retail and Direct (Target) MAPs.

411 Collins Street, Melbourne, Victoria 3000, G.P.O. Box 2282U, Melbourne, Victoria 3001, Australia
Tel: (03) 9629 6888 Fax: (03) 9629 1250 (03) 9224 5387 Email: melb@roymorgan.com
Offices also in: Sydney, Brisbane, Adelaide, Perth, Auckland, London, USA and Indonesia

Australian and New Zealand Member of the Gallup International Association

Roy Morgan Single Source is thorough, accurate, and provides comprehensive, directly applicable information about current and future customers. It is unique in that it directs all the questions to each individual from a base survey sample of around 55,000 interviews in Australia and 15,000 interviews in New Zealand annually - the largest Single Source databases in the world. The questions asked relate to lifestyle and attitudes, media consumption habits (including TV, radio, newspapers, magazines, cinema, catalogues, pay TV and the Internet), brand and product usage, purchase intentions, retail visitations, service provider preferences, financial information and recreation and leisure activities. This lead product is supported by a nationally networked, consultancy-orientated market research capability.

From February 2002 to July 2004, Roy Morgan Single Source was conducted in the USA with a cross-section of 9,395 people aged 14 and over. From October 2003 to February 2004, Roy Morgan Single Source was conducted in UK with 1,570 people aged 14 and over, and from April to July 2004 in Indonesia with a cross section of 2,500 people aged 14 and over.

Because of the wide range of services offered, Roy Morgan Research is able to employ the most appropriate methodology to meet the requirements of each study, which in many cases, involves the use of a combination of research techniques.

Roy Morgan Research is one of the few market research companies in the world who owns their own analysis software ([ASTEROID](#) and ASTEROID Search) used for delivering survey data to clients and enabling clients to perform their own 'in-house' analysis.

Milestones in the development of Roy Morgan Research are as follows:

- **1941** - Established by Roy Morgan as a public opinion polling and consumer research company, being affiliated ultimately with Gallup International.
- **Early Seventies** - Established first face to face Omnibus in Australia and commenced the collection of Roy Morgan Readership figures for publishers and agencies which quickly became the currency for readership in Australia.
 - Commencement of Consumer Panel of Australia which continued until 1993.
- **Late Seventies** - Expanded Roy Morgan Readership Survey to include radio and television consumption as the first step in developing a Single Source service.
 - Commenced collection of warehouse withdrawals data which was ultimately incorporated into a joint venture with Dun & Bradstreet of the US.
- **1984** - Developed the Roy Morgan Values Segments¹.
- **1985** - Acquired ASI (Audience Studies Inc.) which specialises in pre and post advertising testing and developed the Perception Monitor.
 - Established the Roy Morgan CATI Telephone Surveys using Computer Assisted Telephone Interviewing (CATI) system.

¹ Developed in conjunction with Colin Benjamin of The Horizons Network

- Substantially re-developed Roy Morgan Readership Survey to include increased product and service usage and behavioural data to be analysed by media consumption (print, radio and television).
- **1986**
 - Successfully conducted a Melbourne TV Meter trial survey proving the concept and logistics of the adoption of such an approach versus the incumbent diary method.
- **1987**
 - Commenced prototype development of ASTEROID primarily to furnish cross-tabulations. This software service is proprietary and has been developed to include MMI, AID, Correspondence Analysis and MCI. In 1995 a Windows version was launched and in 1998 a Multi-Media Reach and Frequency was introduced.
 - Entered into a Joint Venture with Dun & Bradstreet of the USA to form AC Nielsen (Australia Pty. Ltd) to provide electronic measurement of the television viewing audience.
- **1990**
 - AC Nielsen (Australia) Pty Ltd won the support of several TV networks to conduct an Australian TV rating survey using people meters, covering all mainland capital cities.
- **1991**
 - Roy Morgan Research sold their share in AC Nielsen (Australia) Pty Ltd.
- **1995**
 - Roy Morgan BrandPLANNER launched.
 - ASTEROID for Windows launched - a PC-based survey analysis system.
- **1997**
 - Roy Morgan Single Source launched (Australia).
 - Roy Morgan Single Source launched (New Zealand).
 - Development of global strategy for Roy Morgan Single Source.
- **1998**
 - Launch of ASTEROID multi-media reach and frequency analysis package.
- **1999**
 - Established Roy Morgan Internet Monitor in conjunction with PC Data of the USA.
- **2000**
 - Establishing Roy Morgan Single Source in the USA and UK.
- **2003**
 - Used the Morgan 'Worm' to measure the effectiveness of editorial and advertising in newspaper and magazines; and on television, radio, posters and the Internet.
- **2004**
 - Launched Roy Morgan Single Source in Indonesia.
 - Established [Roy Morgan Young Australian Survey](#) which is a continuous survey of approximately 6,000 children aged 6-13 year
 - ASTEROID won the Microsoft sponsored 'Consensus Software Awards'.
 - Purchased [Mapes and Ross](#) in the US. Mapes and Ross are specialists in communication and advertising research.
- **2005**
 - Purchased Mail Diary Panel in the US.

With ASTEROID and ASTEROID Search, Roy Morgan Research is in the forefront of applying leading edge technology to data collection, database management, analysis and both internal and client interrogation of the information.

Roy Morgan Single Source is used by publishers, the Internet, radio and TV stations, agencies, marketers and advertisers. Roy Morgan's print media measurement method provides the Australian readership currency. Roy Morgan's readership estimates in Australia, New Zealand, the US and UK, are believable when compared to circulation figures (see below). ["Pitfalls of International Market Research"](#) .

The commitment to Quality was confirmed in 1995 when Roy Morgan Research became Quality Assured under NATA, JASANZ No. S1220792AS, Certificate No. 6669.

The following are recent papers presented by Gary Morgan, Executive Chairman, and/or Michele Levine, Chief Executive Officer (see **red** notes re TV ratings and comparisons):

- [Future Summit Participants – Our views and how they compare](#), May 2007
- [Measuring Engagement](#), March 2007
- [Political & Economic Overview 2007 – Another Election Year](#), February 2007
- [Understanding and Communicating with Australian Holidaymakers](#), December 2006
- [Is a Fair Society a Happy Society?](#) November 2006
- [The Power of Newspaper Editorial & Advertising](#), October 2006
- [Not More Research – Sales Rules!](#) September 2006
- [Fifty Years Of Television](#), September 2006
- [Website Visitation Measurement](#), July 2006
- [Newspapers Are Transforming Not Disappearing](#), July 2006
- [Truth, Democracy and the Commonwealth](#), May 2006
- [The Value of Listening to People](#), May 2006
- [Media Neutral Analysis of Key Advertising Media](#), March 2006
- [Advertising Rules! – Like them or not](#), March 2006
- [Convergence at the Crossroads: Key Issues in Media Measurement](#), February 2006
- [What people want and expect from Government – A Roy Morgan Enquiry](#), February 2006
- [Advertising-Adverteasing-Advertiring?](#) October 2005
- [Tourism & Leisure in the 21st Century](#), October 2005
- [Men were from Mars, Women from Venus](#), September 2005
- [Convergence – Making Sense of the New Landscape](#), August 2005
- [Australia – Open for Business](#), May 2005
- [Direct Mail And The Importance Of Measurement](#), May 2005
- [Australia – Open for Business](#), May 2005
- [Technology, Innovation & Entrepreneurship](#), May 2005
- [The Brand Strength of Sustainable Tourism](#), April 2005
- [Doing Business Globally - Marketing "Brand India"](#), March 2005
- [Beyond Media Neutrality and Accountability to R³OI and Capital Choice](#), November 2004
- [Doing Business Globally - Marketing "Brand Melbourne"](#), October 2004
- [Are you going by the numbers? IF YES: Are they the right numbers?](#) October 2004
- [The Mood of the Electorate and the Federal Election](#) (4 days after the bombing of the Australian Embassy in Jakarta), September 2004
- [Connecting the World through International Single Source](#), August 2004
- [People vs USA Today: US Readership Estimates Must Be Believable](#), July 2004
- [A Fresh Look at Estimating Readership Frequency Distributions](#), June 2004
- [A Global Review of Print Readership Surveys](#), June 2004
- [Globalisation – an International Perspective](#), May 2004
- [Reading: looking into...logging onto](#), October 2003
- ["Readers-per-copy": beyond the phoney figure debate to understanding reader choice and how to drive it your way](#), October 2003

- [The Mind and Mood of Australia \(just a little unplugged\)](#), May 2003
- [Understanding Your Customer and Your Brand](#), April 2003
- [Threats to the Environment](#), July 2002
- [Australians and Giving – a Global Comparison](#), July 2002
- [Single Source - for Increased Advertising Productivity in a Multimedia World](#), Nov 2001
- [A New Method to Measure Media Casualness for Magazines and Newspapers](#), October 2001, (Presentation)
<http://www.roymorgan.com/resources/pdf/papers/20011001.pdf> (Paper)
- [Australia and the Global Marketplace](#), August 2001
- [US Newspaper and Magazine Readership Estimates for High Income Earners \(Includes Nielsen and Roy Morgan ratings for 7 TV Programs\)](#), June 2001 (comparing Roy Morgan audience estimates with Nielsen audience estimates)
- [Only Real Leadership or a Crisis can save the L-NP Coalition](#), May 2001
- [The Future of Market Research](#), July 2000
- [Single Source - The Problem Solver \(This paper compares Roy Morgan Diary TV ratings with Nielsen People Meter TV ratings\)](#), July 2000
- [Proof! Same budget, get 30-50% greater value!](#) May 1998