

Roy Morgan
—New Zealand—

How we collect and process Single Source data in New Zealand.



Discover your edge

About Roy Morgan Research

Roy Morgan Research is the largest and longest established Australian market research company, with over seventy years of experience in the conduct of market research.

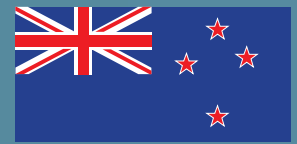
We are an independent wholly Australian owned private company. Established by Roy Morgan in 1941, the organisation is a household name linked to professional, high quality, consultancy orientated market research in media and other industries. Roy Morgan Research has conducted the National Readership Survey in Australia since 1974. All major publishers and all major media buying houses subscribe to our readership data.

In 1988 Roy Morgan Research embarked on a program of international expansion with a view to making Single Source a leading global source of relevant quality information. Roy Morgan Research's reputation has been founded on our ability to provide consistency, quality and continuity in its service to all clients.

A commitment to quality service is fundamental to the way we do research. This commitment occurs at every stage of the research process and is reflected by our certification to the ISO 20252 Market, Opinion & Social Research Standard and to the ISO 9001 Quality Systems Standard.

Roy Morgan adheres to The Code of Professional Behaviour of ESOMAR, the Market Research Society of Australia, the National Privacy Act (NPPS) and all other relevant legislation.





Single Source Flow Chart

How we obtain and interpret our information for New Zealand.

Questionnaire Design

This phase involves the design and production of what we call weekly Establishment Surveys (ES) which are Interviewer administered by telephone. Also, at this stage we produce monthly Self-Completion Materials (SCM).

Responses

Telephone interviewing is conducted on weeknights and weekends. SCM's are mailed to respondents with up to 2 reminders to participants.

Data Capture

At this point completed SCM's are returned to Melbourne for Data Capture, where they are graded, scanned and operator verified.

Data Analysis

Data cleaning, processing and weighting takes place at this stage. Here we build Single Source databases for ASTEROID and create hardcopy reports. We then distribute reports and ASTEROID databases to local and international clients.



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The areas we cover when creating the Sampling Plan

Sample Size	<ul style="list-style-type: none"> • n=12,000 per year • n=1,000 per month • Continuous
Coverage	<ul style="list-style-type: none"> • North and South Island • 16 Regional council areas
Schedule /Timing	<ul style="list-style-type: none"> • Weekly • 48 weeks per year (4 quarters x 12 weeks) • Calls made Thursday - Sunday 5-9 pm • 2 reminder call backs Sunday - Thursday
Household	<ul style="list-style-type: none"> • People 14+ • Private households • With telephone • Individual selection – youngest male then youngest female • Auditing -10% of calls audited (on screen and listen in)
Sampling	<ul style="list-style-type: none"> • Random Digit Dialling • Minimum of 6 calls to establish contact • Automated sample controlled via CATI system • Automated dialling • Automated programming via CATI to ensure sample returned different times and days • Booster samples hard to get eg. Auckland and young males
Weighting	<ul style="list-style-type: none"> • Monthly by: - Geography - Age - Sex - Household size • Source: NZ Bureau of Statistics
Incentives	<ul style="list-style-type: none"> • Yearly prize draw \$3,000 • Quarterly prize draw \$500



How Roy Morgan collates and interprets data Processing



Recruitment/ Establishment Survey	<ul style="list-style-type: none"> • Melbourne, Australia & Kuala Lumpur, Malaysia • Computer Assisted Telephone Interviewing (CATI) • Survey content - Survey & Incentive explanation - Demographics
Interviewers	<ul style="list-style-type: none"> • Experienced CATI Interviewers • Fully briefed • One supervisor per 10-14 interviewers • Payment based on a combination of minimum hourly award and incentive system • Confidentiality agreements • Approximately 10% of interviews audited (on screen and listen in)
Self-Completion Material(SCM)	<ul style="list-style-type: none"> • Printed Melbourne, Australia • Dispatched Auckland, NZ • Self-Completion Poll booklets • Version control and inventory systems exist to ensure correct material sent to survey participants • Accompanying material includes:- Letter of introduction - Pen - Business reply envelope
Return Procedure	<ul style="list-style-type: none"> • Up to 2 CATI reminder calls used to improve response rate • Reminder letter for those not contacted by phone • 0800 help line available to participants • Returned in Business postage-paid envelopes to Melbourne office • Returns recorded, sorted and graded • Unique indentifying barcode recorded on return
Data Capture	<ul style="list-style-type: none"> • Melbourne, Australia • Stringent quality checks & balances throughout scanning process • Polls less than 50% complete not used • Utilise ReadSoft's Eyes & Hands data capture software • 3 x Fujitsu 3099GX scanners • Data Capture - Mark fields 96% of all fields (100% accurate after verification) <ul style="list-style-type: none"> - Numeric fields 3% of all fields (99% accurate after verification) - Alpha fields 1% of all fields (98% accurate after verification) • On screen human verification • All pages stored in image storage system
Data Processing	<ul style="list-style-type: none"> • CATI interview matched to returned questionnaire • Logical edit checks on the data • Data cleaning according to documented procedures • Questionnaire images examined to resolve data inconsistencies • Provision for imputation of missing data • Data projected according to latest NZ estimates • Results validated against known industry estimates • ASTEROID database delivery allows easy data retrieval



The most extensive, inter-related Survey Content

Self-Completion Material

- | | |
|---|---|
| <ul style="list-style-type: none">• Accounts (Banking)• Activities and Interests• Alcoholic Beverages• Attitudes and Lifestyles• Business Decisions• Catalogues• Cinema Attendance• Credit Cards• Demographics• Financial Institutions• Food Purchases / Consumption• Gambling and Gaming• Holidays and Travel• Household Items / Appliances• Household Products Bought• Internet Behaviour and Preferences• Job Satisfaction• Loans• Location TV• Magazine Readership• Media Most Useful• Media Preference by Daypart | <ul style="list-style-type: none">• Media Usage• Motor Vehicles• Newspaper Readership• Non-Alcoholic Beverages• Pay TV Channel Involvement• Personal Services• Radio Diary• Radio Listening• Retail – Non-food Purchasing• Roy Morgan Values Segments*• Sectional Reading of Newspapers• Shares• Sporting Participation• Supermarkets• Take Away Food• Telecommunications• TV Attention Level• TV Diary• TV Program Involvement• TV Viewing• Utilities• Website Visitation |
|---|---|

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



Roy Morgan Single Source Results and Comparisons

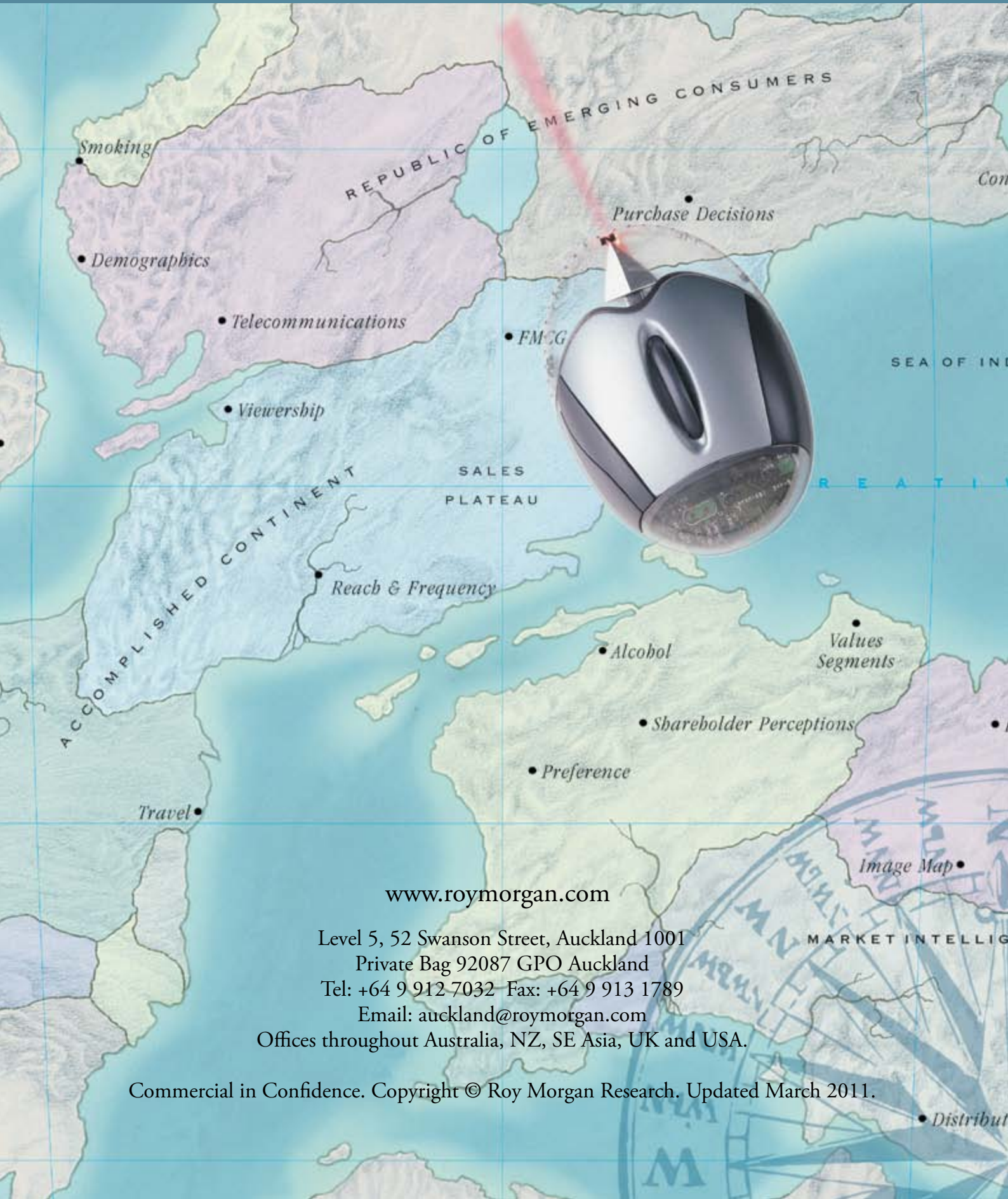


Comparative Statistics		External Data Source (All People Unless Otherwise Stated)	Roy Morgan Single Source Survey (People Aged 14+ Unless Otherwise Stated)
1.	Average Weekly Income (all sources) - Annualised	\$35,724 NZ Income Survey Quarter to June 2010 (Aged 15+)	\$35,561 12 months to December 2010
2.	Average Weekly Income (all sources) - Annualised by Gender	Male - \$43,004 Female - \$28,808 NZ Income Survey Quarter to June 2010 (Aged 15+)	Male - \$43,680 Female - \$27,883 12 months to December 2010
3.	Resident Households with a Mortgage	35.1% NZ Census 2006	33.8% 12 months to December 2010 (35.1% - 12 months to June 2006)
4.	Credit Cards - Average Monthly Billing	\$3.0 billion Reserve Bank of NZ December 2010	\$2.8 billion 12 months to December 2010
5.	Transaction/Call Account Funds (inc. Term) held in Banks	\$74.8 billion Reserve Bank of NZ December 2010	\$90.1 billion Quarter to December 2010
6.	Total Loans - Dollars Outstanding	\$183.1 billion Reserve Bank of NZ December 2010	\$157.5 billion 12 months to December 2010
7.	Mortgages - Dollars Outstanding	\$171.0 billion Reserve Bank of NZ December 2010	\$144.8 billion 12 months to December 2010
8.	Mobile Phone Ownership	85% Household use of Information and Communication Technology Quarter to December 2009 NZ Statistics (Aged 15+)	86% 12 months to December 2010
9.	Cinema Attendance - Annual visits	15.3 million visits The Motion Picture Distributors Association 2010	16.8 million visits Quarter to December 2010
10.	Drink Alcoholic Beverage by Gender	Male - 88% Female - 83% NZ Health Survey (2007/08) Ministry of Health (Aged 16-64)	Male - 84% Female - 82% 12 months to December 2010 (Aged 18+)
11.	Number of Registered Vehicles	2.9 million* Land Transport Safety Authority June 2010 (*Note: Excludes Rental Cars/Trailers/Caravans)	3.2 million 12 months to December 2010
12.	Highest Educational Qualification - Have Diploma or Degree	716,000* NZ Census 2006 (*Note: 10.4% of the population unclassified)	1.2 million 12 months to December 2010
13.	Pay TV Penetration (% of TV Households)	51% Ministry of Economic Development 2006	52% 12 months to December 2010
14.	Internet Users	2.9 million 2010 International Telecommunication Union (Aged 15+)	3.1 million 12 months to December 2010 (Aged 16+)



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