



How we collect and process Single Source data in Australia.



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

We are an independent wholly Australian owned 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. Our Quality Management System is certified to AS/NZS ISO 9001:2008 Quality Management Systems – Requirements & AS ISO 20252 Market, Opinion and Social Research - Vocabulary and Service Requirements. This commitment occurs at every stage of the research process.

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.

Comparative Statistics		External Data Source (All People Unless Otherwise Stated)	Roy Morgan Single Source (People Aged 14+ Unless Otherwise Stated)
1.	Labour Force (Number of Employed Persons)	11.5 million (Aged 15+) Australian Bureau of Statistics Catalogue No. 6202.0 June 2011	11.2 million Quarter to June 2011
2.	Average Weekly Income - Full Time Employed Annualised	\$70,673 (Aged 21+) Australian Bureau of Statistics Catalogue No. 6302.0 May 2011	\$73,494 (Aged 21+) 12 months to June 2011
3.	Percentage of People who earn \$1,600 or more per week	8.2% (Aged 20-64) Australian Bureau of Statistics August 2006 Census	16.5% (Aged 20-64) 12 months to June 2011 (8.9% - 12 months to August 2006)
4.	People with a Tertiary Degree or Higher Education	3.3 million (Aged 15-64) Australian Bureau of Statistics Catalogue No. 6227.0 May 2010	4.4 million (Aged 15-64) 12 months to June 2011
5.	Total Deposits - Banks	\$495.8 billion Australian Prudential Regulation Authority (APRA) June 2011	\$427.0 billion Quarter to June 2011
6.	Superannuation Assets Held	\$1,340.0 billion Australian Prudential Regulation Authority (APRA) June 2011	\$1,384.5 billion Quarter to June 2011
7.	Population with Private Health Insurance	47% (Aged 20+) Private Health Insurance Admin Council Quarter to June 2011	46% (Aged 20+) Quarter to June 2011
8.	Internet Users	17.1 million International Telecommunication Union 2010	16.8 million 12 months to June 2011
9.	Households with Broadband Connection	5.0 million Australian Bureau of Statistics Catalogue No. 8146.0 July 2008 - June 2009	5.1 million Quarter to June 2011
10.	Households with a Computer	78% Australian Bureau of Statistics Catalogue No. 8146.0 July 2008 - June 2009	83% 12 months to June 2011
11.	Cinema Attendance - annual visits	92.4 million visits Motion Picture Distributors Association of Australia 2010	92.8 million visits 12 months to June 2011
12.	Pay TV Penetration (% of Households)	28% Screen Australia June 2010	24% 12 months to June 2011
13.	Percentage of Population with an Overweight Body Mass Index	Males - 41.0% Females - 28.0% (Aged 18+) Australian Bureau of Statistics Catalogue No. 4364.0 2007-2008	Males - 41.2% Females - 27.7% (Aged 18+) 12 months to June 2011
14.	No. of Registered Vehicles (Passenger and Light Commercial Vehicles)	15.0 million Australian Bureau of Statistics Catalogue No. 9309.0 January 2011	14.5 million 12 months to June 2011
15.	Participation in Sport and Physical Activity	64% (Aged 15+) Australian Bureau of Statistics Catalogue No. 4177.0 2009-2010	63% 12 months to June 2011



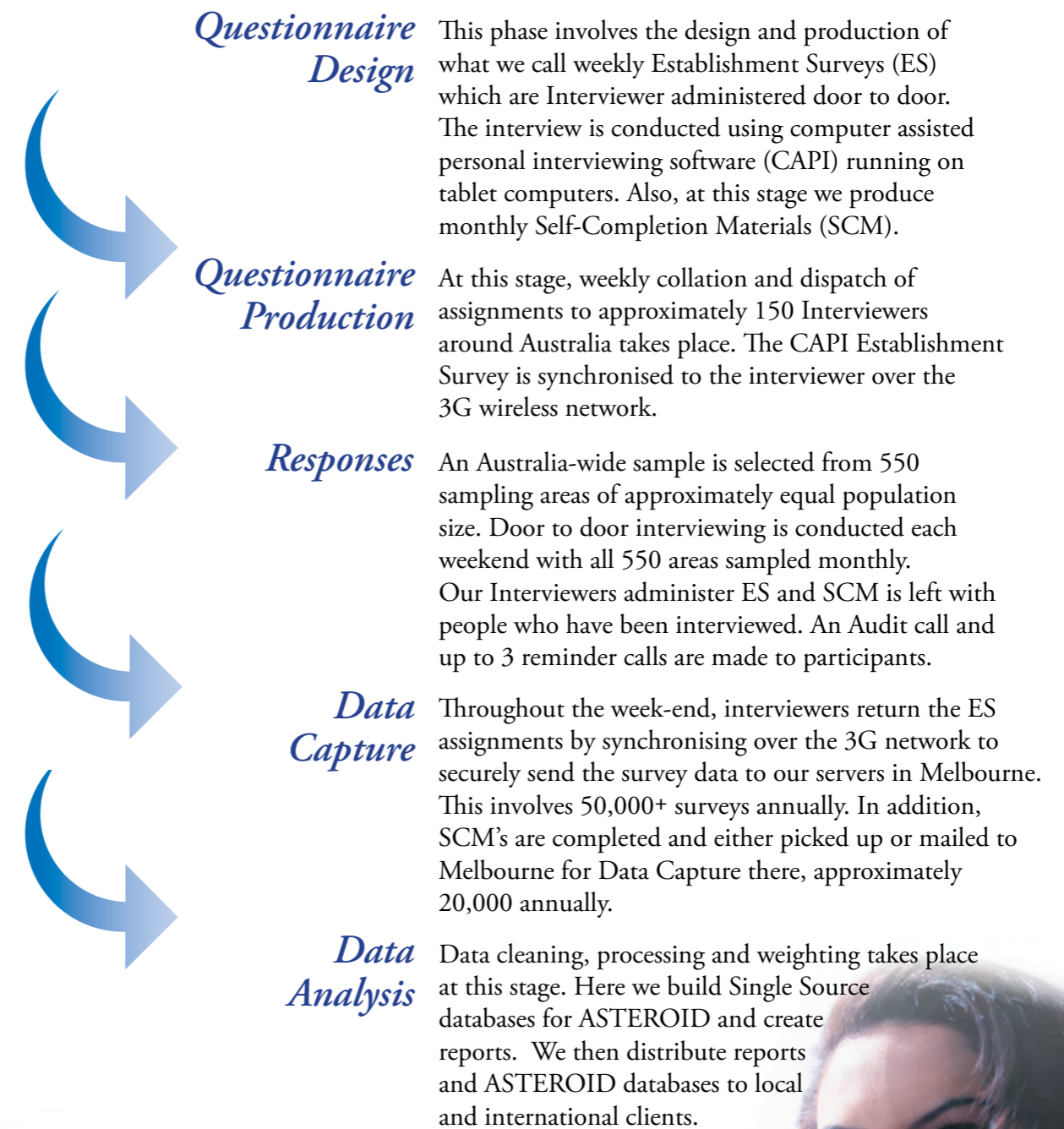
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Establishment Survey <i>n</i> = 50,000+	
<ul style="list-style-type: none"> • Newspaper Readership • Magazine Readership • Cinema Attendance • TV Viewing • Radio Listening • Financial Institutions 	<ul style="list-style-type: none"> • Credit Cards • Loans • Accounts • Business Decisions • Demographics • Roy Morgan Values Segments*
Self-Completion Material <i>n</i> = 20,000	
<ul style="list-style-type: none"> • Activities and Interests • Alcoholic Beverages • Attitudes and Lifestyles • Catalogues • Food Purchases / Consumption • Gambling and Gaming • Holidays and Travel • Household Items / Appliances • Household Products Bought • Internet Behaviour and Preferences • Job Satisfaction • Location TV • Media Most Useful • Media Preference by Daypart • Media Usage • Motor Vehicles • Non-Alcoholic Beverages • Pay TV Channel Involvement 	<ul style="list-style-type: none"> • Personal Services • Radio Diary • Retail – Non-food Purchasing • Sectional Reading • Shares • Shopping Centres • Sporting Participation • Supermarkets • Take Away Food • Telecommunications • Time Spent on Activities • Time Spent with Media • TV Attention Level • TV Diary • TV Program Involvement • Utilities • Website Visitation • Word of Mouth

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

How we obtain and interpret our information for Australia.



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The areas we cover when creating the Sampling Plan

How Roy Morgan collates and interprets data Processing



Sample Size	<ul style="list-style-type: none"> n=50,000+ pa n=4,200+ per month
Coverage	<ul style="list-style-type: none"> All States and Territories 11 major geographic strata Sydney Melbourne Brisbane Adelaide Perth remaining areas of NSW/ACT Vic Qld SA/NT WA and Tasmania 60 specific readership strata All community and regional newspaper distribution areas All shopping centre catchment areas All Federal Electorates
Schedule/Timing	<ul style="list-style-type: none"> Weekly 48 weeks per year (4 quarters x 12 weeks) Calls made during the day on Saturday and Sunday Up to 3 reminder / audit calls
Household	<ul style="list-style-type: none"> People 14+ Private households Individual selection – youngest male then youngest female Specific procedures for apartment dwellers Auditing 10% to 75% of all interviews
Sampling	<ul style="list-style-type: none"> Random starting addresses Up to 3 calls to establish contact (different times) Clusters of 8 interviews 1 interview per household Boosted sampling for selected areas Weekly and monthly reports on sample performance Response Rate. One in three effective contacts results in an interview*
Weighting	<ul style="list-style-type: none"> Monthly by: - Geography - Age - Sex - Household size Source: ABS
Incentives	<ul style="list-style-type: none"> Differential incentives for different subgroups Rewards for survey completion Magazine Subscriptions Donations Movie Tickets Computer Games Prize Draws

* Telephone interviewing: one in five effective contacts results in an interview.

Establishment Survey	<ul style="list-style-type: none"> All material printed in Melbourne office Interviews conducted face to face using computer assisted personal interviewing (CAPI) on tablet computers Variations by state Survey content Survey & Incentive explanation Demographics Readership Finance Roy Morgan Values Segments* Weekly rotations of answer-lists Vehicle for placement of SCM
Interviewers	<ul style="list-style-type: none"> Experienced CAPI face to face Interviewers 75% of interviews conducted by interviewers with more than 12 months experience Fully briefed Confidentiality agreements 10% to 75% of interviews audited by telephone Weekly and monthly reports on Interviewer Performance from Field Management and Quality Systems
Self-Completion Material (SCM)	<ul style="list-style-type: none"> All material printed in Melbourne Office Placed by Interviewer at end of Establishment Survey Interview Completed by Respondent Separate Media diaries for each state
Return Procedure	<ul style="list-style-type: none"> Up to 3 SMS or CATI reminder calls used to improve response rate for SCM Reminder letter for those not contacted by phone 1800 help line available to participants Returns recorded, sorted and graded Unique identifying barcode recorded on return Interviewers return assignments electronically as soon as they finish interviewing Respondents return SCM by reply paid post
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 Forms data capture software 3 x Kodak i780 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 operator verification All pages stored in image storage system
Data Processing	<ul style="list-style-type: none"> Establishment interview matched to returned Self-Completion questionnaires 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 ABS estimates Results validated against known industry statistics ASTEROID database delivery allows easy data retrieval

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