

Roy Morgan
— International —

How we collect and process Single Source data in the USA.



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Roy Morgan International is a global marketing research organization widely recognized for its Single Source syndicated compendium of consumer data, ASTEROID software for marketers, distinctive custom research and advertising communication testing.

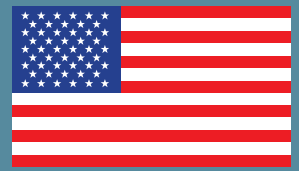
Roy Morgan covers the world from offices in the United States, England, Indonesia, New Zealand and Australia. Headquartered in Melbourne, it is Australia's core public opinion and marketing information resource. Roy Morgan has conducted the National Readership Survey in Australia and has been the currency since 1974. All major publishers and all major media buying houses in that market subscribe to Roy Morgan Media Research data.

Founder Roy Morgan visited Princeton, NJ, the crucible of modern public opinion research, beginning in the 1940's. Here he collaborated with Dr. George Gallup and others, returned to Australia and founded Roy Morgan Research, where Roy's son, Gary Morgan, is the Executive Chairman today.

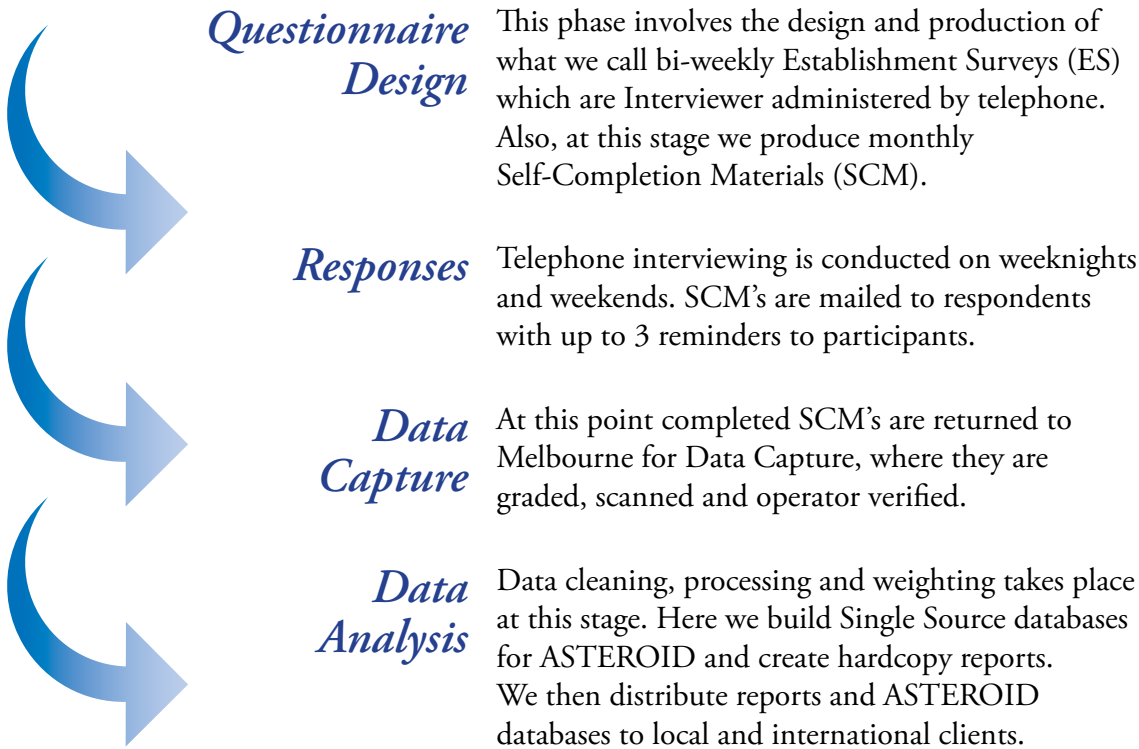
Roy Morgan adheres to The Code of Professional Behaviour of ESOMAR, and a commitment to quality service is fundamental to the way we do research. This commitment occurs at every stage of the research process and is reflected by our certification to the ISO20252 Market, Opinion & Social Research Standard and to the AS/NZ ISO 9001 Quality Systems Standard.



Single Source Flow Chart



How we obtain and interpret our information for the United States.



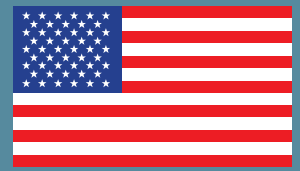
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The areas we cover when creating the Sampling Plan

Sample Size	<ul style="list-style-type: none"> • n=3,000 pa • Continuous
Coverage	<ul style="list-style-type: none"> • 50 States • Top 26 Local Market Areas • 5 US Census Regions - North East - South - Mountain - Mid West - Pacific (including Alaska and Hawaii)
Schedule/ Timing	<ul style="list-style-type: none"> • Weekly • 48 weeks per year (4 quarters x 12 weeks) • Calls made: Tuesday - Saturday 5-9 pm (US local time) • 3 reminder call backs Monday - Thursday
Household	<ul style="list-style-type: none"> • People 14+ • Private households • Individual selection – youngest male then youngest female • Auditing - 10% of calls audited (on screen and listen in)
Sampling	<ul style="list-style-type: none"> • RDD stratified geographically • Minimum of 6 calls to establish contact • Automated sample controlled via CATI system • Automated dialing • Automated programming via CATI to ensure sample returned different times and days • Booster samples of hard to get eg. Hispanics/African Americans • Over- sampling of Affluent
Weighting	<ul style="list-style-type: none"> • Quarterly by: Geography - Age - Sex - Household size - Race • Affluence/income • Education • Source: US Census Bureau
Incentives	<ul style="list-style-type: none"> • Respondent incentives • Combination of incentives: up front pre-survey incentives rewards for survey completion



How Roy Morgan collates and interprets data Processing



Recruitment/ Establishment Survey	<ul style="list-style-type: none"> • 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 hourly and incentive system • Confidentiality agreements signed by all interviewers • Approximately 10% of interviews audited (on screen and listen in)
Printing and Dispatch	<ul style="list-style-type: none"> • Version control and inventory systems exist to ensure correct material sent to survey participants • Accompanying material includes: Letter of introduction - Incentive - Pen - Business reply envelope • USPS First Class Priority
Return Procedure	<ul style="list-style-type: none"> • Up to 3 CATI reminder calls used to improve response rate • Reminder letter sent to respondents not contacted by phone • Toll Free help line available to participants at our Princeton NJ office • Returned in Business postage-paid envelopes to our Princeton NJ office • Returns recorded, sorted and graded at our Princeton NJ office • Boxed and sent to Melbourne • Unique indentifying barcode recorded on return
Data Capture	<ul style="list-style-type: none"> • Stringent quality checks & balances throughout scanning process • Polls less than 50% complete not used • Utilize ReadSoft's Eyes & Hands data capture software • 3 x Fujitsu scanners • 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 US Census • Results validated against known industry estimates • ASTEROID database delivery allows easy data retrieval



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The most extensive, inter-related Survey Content

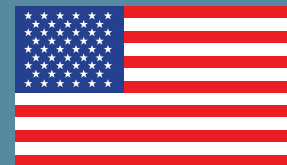
Self-Completion Material

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



Roy Morgan Single Source Results and Comparisons

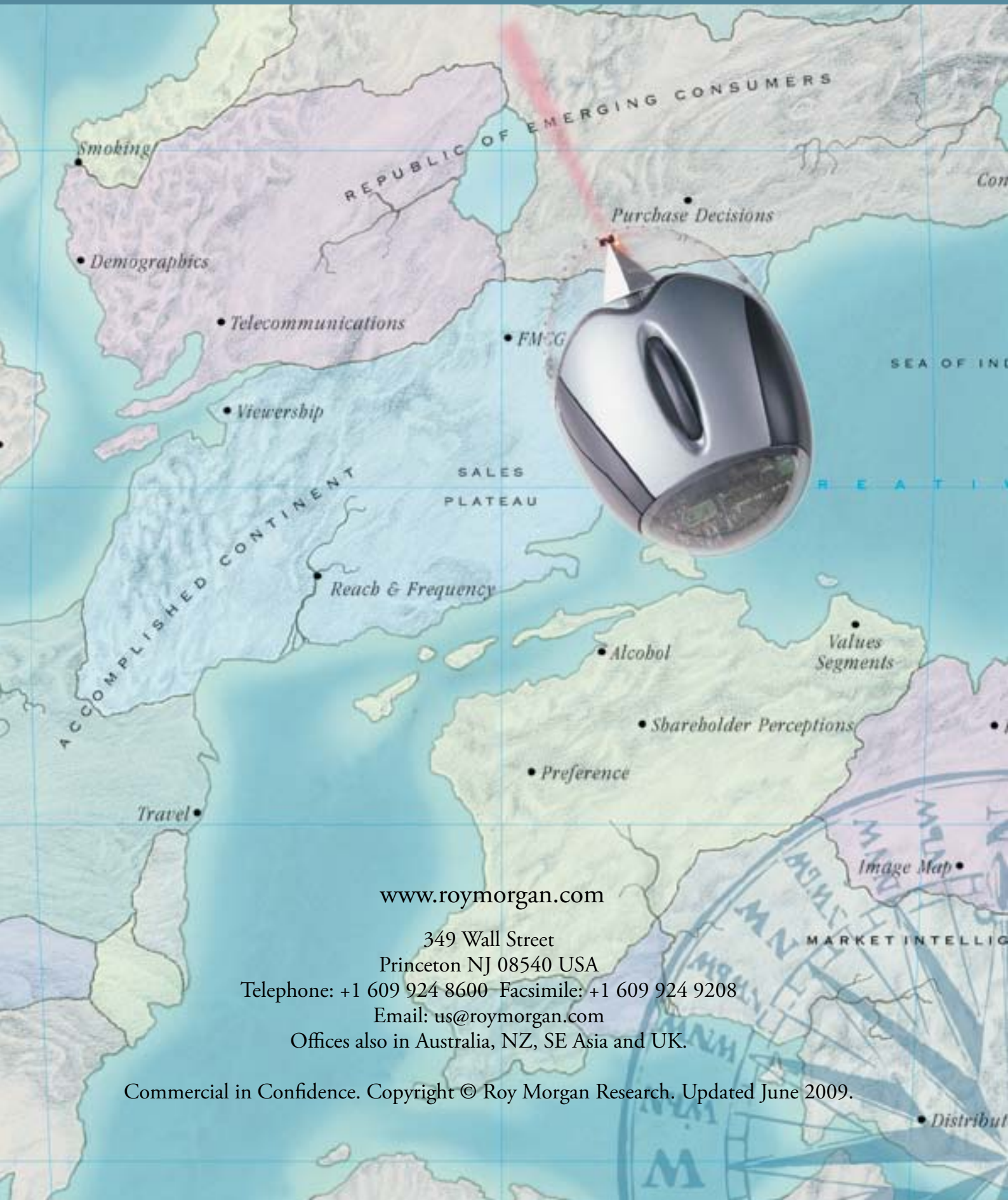


Comparative Statistics		External Data Source (All People Unless Otherwise Stated)	Roy Morgan Single Source Survey (People Aged 14+ Unless Otherwise Stated) March 2008 - December 2008 n=2837
1.	Labor Force Participation Rate	66% (Aged 16+) United States Department of Labor December 2008	64% (Aged 16+)
2.	Annual Household Income	\$68,424 Current Population Survey U.S. Census Bureau 2008	\$67,094
3.	Marital Status - Married	123.6 million people (Aged 18+) U.S. Census Bureau 2008	132.9 million people (Aged 18+)
4.	Education Attainment - Associate Degree or Higher	79 million people (Aged 18+) Current Population Survey, Annual Social & Economic Supplement U.S. Census Bureau 2008	75 million people (Aged 18+)
5.	Housing Status	67% Owner Occupied 33% Renting/Other U.S. Census Bureau 4th Quarter 2008	66% Own/Paying off Home 34% Renting/Other
6.	Internet Users	231 million International Telecommunication Union (ITU) 2008	236 million
7.	Cell Phones - No. of Subscribers	255 million CIA World Fact Book 2007	206 million
8.	Cinema Attendance - annual visits	1.4 billion National Association of Theatre Owners (NATO) 2008	1.4 billion
9.	Alcohol Consumption	64% (Aged 18+) National Center for Health Statistics (NCHS) 2008	62% (Aged 21+)
10.	Percentage of Population with an Overweight or Obese Body Mass Index	68% (Aged 20+) National Health and Nutrition Examination Survey (NHANES) National Center for Health Statistics (NCHS) 2007-2008	68.8% (Aged 20+)
11.	No. of Registered Vehicles	256 million vehicles Bureau of Transportation Statistics U.S. Department of Transportation (Includes Commercial Vehicles) 2008	218 million vehicles (Excludes Commercial Vehicles)
12.	Pet Ownership (Percentage of Households)	Dogs - 41% Cats - 34% National Pet Owners Survey American Pet Products Manufacturers Association (APPMA) 2009-2010	Dogs - 40% Cats - 33%



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Roy Morgan
International



www.roymorgan.com

349 Wall Street

Princeton NJ 08540 USA

Telephone: +1 609 924 8600 Facsimile: +1 609 924 9208

Email: us@roymorgan.com

Offices also in Australia, NZ, SE Asia and UK.

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