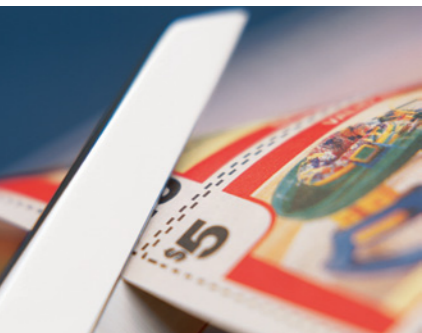


Retail MAP

Roy Morgan Values Segments

This unique profiling system provides additional insights into the retail market.



From six dimensions we are able to develop ten mindset segments of the population based on the deeper drivers of choice and change – their values and fundamental ways of approaching the world. There are four human social dimensions

(*Individualism, Life Satisfaction, Conservatism and Innovation*) and two dimensions that ground the *Values Segments*¹ in marketplace reality (*Quality Expectations and Price Expectations*).

“Learn to know your customers like intimate friends.”



Using Roy Morgan Values Segments, we can understand the following:

- People in the ‘*Socially Aware*’ and ‘*Visible Achievement*’ segments are most likely to have purchased CD’s, DVD’s audio or video tapes and hi-fi accessories.
- The ‘*Fairer Deal*’, ‘*Conventional Family Life*’, ‘*Something Better*’ and ‘*Young Optimism*’ segments are most likely to buy house brands.

- The ‘*Look at Me*’ and ‘*Young Optimism*’ segments are more likely to say that they enjoy clothes shopping and buy products because of their labels.
- The ‘*Fairer Deal*’, ‘*Conventional Family Life*’ and ‘*Something Better*’ segments are more likely to have bought goods on lay-by.
- The ‘*Basic Needs*’ and ‘*Conventional Family Life*’ segments believe that it is important for supermarkets to offer good weekly specials.
- The ‘*Socially Aware*’ and ‘*Real Conservatism*’ segments are less likely to set aside a particular day for grocery shopping.

Using the full capacity of Roy Morgan *Single Source* all of these issues can be explored further to understand the dynamics and motivations behind each segment.



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¹Devised by Michele Levine of Roy Morgan Research and Colin Benjamin of The Horizons Network.

Discover your edge

Retail MAP

Retail MAP (Marketing and Advertising Planner)

Whether you manage a chain, a diversified group of chains, a single specialist store or you’re a supplier, Retail MAP is an invaluable resource for both strategic and tactical planning. As well as providing both quantitative and qualitative insights to retailers, Retail MAP is an equally powerful tool for marketers, advertising agencies and others involved in the retail industry.

You can subscribe to your specific category only, the entire retail sector or any combination of modules.



How to identify, understand, communicate with and motivate your customers.

The world’s largest consumer database.

Roy Morgan Research believes that if you want to know everything about a person, you should ask all of the questions of the *same* person – a single source. This allows us to gather a broad range of information from each person, such as the stores they have shopped at, the kind of car they drive, which financial institutions they use, where they go for holidays, what they drink, the activities they do and the media they consume.

Roy Morgan *Single Source* includes demographics, media behavior, financial information and the non-food retail commodity questions.

The specific retail information collected comprises information on channels, brands and product usage as well as attitudes and activities. The information is collected Nation-wide from people aged 14 and over and represents the population in keeping with the latest census figures.

Delivered in ASTEROID*

ASTEROID is Roy Morgan’s proprietary Windows software that provides instant access to your data, searchable with unlimited criteria and combinations. Each database is updated every quarter, in its entirety.



Retail MAP

What business issues will Retail MAP allow you to explore?

Retail MAP allows you to investigate and explore the issues that are specific to your business. You can subscribe to the relevant modules that impact your product category.

Non-Food Retail Stores (department stores, cosmetics, skincare, hardware, apparel, footwear, nurseries and electrical goods, computers, homewares):

- What are people buying? How many people are buying?
- Is the market for each commodity in growth or decline?
- Are products more likely to be bought at department, discount or specialty stores? Which stores dominate purchase for each commodity?
- Who are the people shopping at your store? Are they old or young, married or single, tall or short? Do they have children? How high is their income?
- How do your customers differ to your competitors' customers?
- How does your store fit into the lifestyle of your target audience? What else do they do? Are they interested in restaurants, gardening, video games, travel or pubs?
- What do your customers think? Are they interested in looking for bargains, buying Australian made products or are they label-conscious?
- Do they notice outdoor advertising, surf the internet or enter competitions?



- How do you communicate with your customers and potential customers? Which television programs do they watch? Are they more likely to read magazines, use the Internet, listen to the radio or visit the cinema?
- Do they read and respond to catalogues?



Supermarkets and Food Retailers (including delis, butchers, bread shops and fruit & vegetable shops):

- How often do people go to the supermarket? Which days of the week do they prefer to shop? Which times of the day are most popular?
- How many people shop at your store? What is your market share?
- Where else are your customers shopping? How much of their spend are you losing to other supermarkets and food retailers?
- What do people think about your store? Do they believe that it is clean and tidy, offers a good range of home brands, offers good value? How does this compare to their view of other stores?
- Who are your customers? Are they male or female, how old are they, what is their weekly income?
- How do you communicate with your customers? Are they more likely to be watching television, using the Internet, listening to the radio, going to the cinema, or reading magazines?

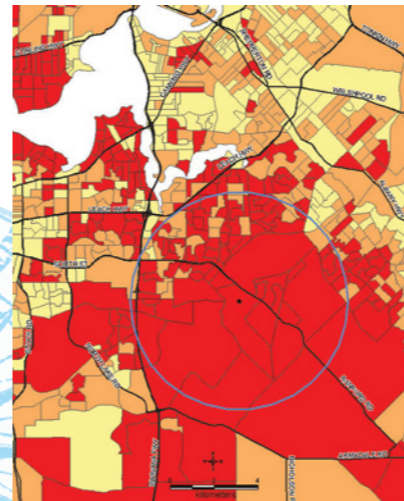


Pharmacies

- How many people visit the pharmacy? Who are they?
- Who are the frequent visitors? Are they more likely to be elderly people, or mothers with young children?
- What personal products do people buy (eg cosmetics, nappies, pain relief)? Where do pharmacies fit in as a channel of purchase? Which other channels dominate for each category?
- What are your customers like? How old are they? How many of them have children? What are their attitudes towards health issues, advertising, shopping and family?
- Who are your potential customers? Are they similar to your current customers or are they a different group which will need to be attracted in different ways?
- How do you reach your customers? Are they likely to be on the Internet, or do they prefer television, cinema or magazines?

Morgan Target Mapping

Morgan Target Mapping takes the guesswork out of location-related decision-making.



Locate your target customer by demographics or *Values Segment*¹, quantify the target population in the catchment area, qualify prospective customers by their current behaviour, select a store location or appropriate merchandise.

For example, Morgan Target Mapping can quantify the number of people 35+ from the *Visible Achievement Values Segment*¹ who buy wine and live downtown. High penetration areas are identified in red and the blue circle pinpoints ideal store locations within a 5 km radius.

Discover your competitive edge.

Retail MAP can offer you many insights into the retail market. For example, did you know that:

- 40% of men's underwear is purchased by women.
- Jeans expenditure is dominated by specialty stores, while underwear and sleepwear expenditure is dominated by discount department stores.
- More than 80% of people have visited a pharmacy in the last 3 months.
- The cosmetics market has no dominant channel – pharmacies, supermarkets, department and discount department stores all compete closely.
- 16% of people believe the offer of discount fuel is very important in choosing a supermarket.
- Grocery buyers aged 65+ are far more likely to choose to shop early in the morning (between 8am and 11am).



This map can then be overlaid with the same criteria for competitors in the area, helping you evaluate potential returns on investment.

Other obvious applications include the selection of mailing lists appropriate to the postcodes of interest, billboards and bus routes for advertising purposes.

