

ROY
MORGAN

How we collect
and process
Single Source data
in Australia



About Roy Morgan



Roy Morgan is the largest and longest established Australian market research company, with over seventy-five 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, finance and other industries. Roy Morgan has conducted the National Readership Survey in Australia since 1974.

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 of service to all clients.

Fundamental to the way we do Research, as well as our commitment to Data Security, we are certified to the AS/NZS ISO9001 Quality Management Systems standard, the ISO20252 Market, Opinion and Social Research standard and the *ISO27001 Information Security standard. Our commitment to quality standards, continuous improvement and data security is evident at every stage of the research process.

Roy Morgan adheres to the Code of professional behaviour of ESOMAR and the Australian Market and Social Research Society, the Federal Privacy Act and all other relevant legislation.



Single Source Flow Chart

How we obtain and interpret our information for Australia.

- Questionnaire Design** This phase involves the design and production of what we call weekly Establishment Surveys (ES). Interviews are conducted face to face in people's homes using computer assisted personal interviewing (CAPI) on tablet computers. Also, at this stage we produce monthly Self-Completion Materials (SCM).
- Questionnaire Production** At this stage, weekly collation and dispatch of assignments to approximately 150 Interviewers around Australia takes place. Each week the CAPI Establishment Survey is synchronised to Interviewers over the 3G wireless network.
- Responses** An Australia-wide sample is selected from 514 sampling areas of approximately equal population size. Door to door interviewing is conducted each weekend with all areas sampled monthly. Our Interviewers administer ES and the SCM is left with people who have been interviewed. An Audit call and up to 3 reminder calls are made to participants.
- Data Capture** Throughout the weekend, interviewers return their ES assignments by synchronising over the 3G network to securely send the survey data to our servers in Melbourne. This involves approximately 50,000 surveys annually which has created a Panel of over 500,000 respondents. In addition, SCM's are completed and either picked up or mailed to Melbourne for Data Capture there, approximately 20,000 annually.
- Data Analysis** Data cleaning, processing and weighting takes place at this stage. Here we build Single Source databases for ASTEROID and create reports. We then distribute reports and ASTEROID databases to local and international clients.

Survey Content

Establishment Survey n = 50,000

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|---|--|
| <ul style="list-style-type: none"> • Newspaper Readership • Magazine Readership • Cinema Attendance • TV Viewing • Radio Listening • Financial Institutions • Telecommunications | <ul style="list-style-type: none"> • Credit Cards • Loans • Accounts • Business Decisions • Demographics • Roy Morgan Values Segments* |
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Self-Completion Material n = 20,000

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| <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 • Time Spent on Activities • Time Spent with Media • TV Attention Level • TV Diary • TV Program Involvement • Utilities • Website Visitation • Word of Mouth |
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Sampling Plan

Sample Size	<ul style="list-style-type: none"> • n = 50,000 pa • n = 1,000 per week
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 • 58 specific readership strata • All major community and regional newspaper distribution areas • All major shopping centre catchment areas • All Federal Electorates
Schedule/Timing	<ul style="list-style-type: none"> • Weekly • 50 weeks per year • 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 person at home • Specific procedures for apartment dwellers • Auditing 50% 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: - Area - Age - Sex - Household size • Source: ABS
















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



Processing

Establishment Survey	<ul style="list-style-type: none"> • All material printed in Melbourne office • Interviews are conducted face to face in people's homes 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 • 50% 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 pick-up or 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 provides easy data retrieval

Results and Comparisons

Comparative Statistics		External Data Source (All People Unless Otherwise Stated)	Roy Morgan Single Source (People Aged 14+ Unless Otherwise Stated)
	Labour Force (Employed or Looking for Work)	13.3 million (Aged 15+) Australian Bureau of Statistics Catalogue No. 6202.0 June 2018	13.4 million (Aged 15+) Quarter to June 2018
	Average Weekly Income - Full Time Employed Annualised	\$85,831 (Aged 21+) Australian Bureau of Statistics Catalogue No. 6302.0 May 2018	\$84,570 (Aged 21+) Quarter to June 2018
	Percentage of People who earn \$3,000 or more per week	4.2% (Aged 20-64) Australian Bureau of Statistics August 2016 Census	4.2% (Aged 20-64) 12 months to September 2016
	Superannuation Assets Held	\$2,711 billion Australian Prudential Regulation Authority Quarter to June 2018	\$2,629 billion Quarter to June 2018
	Population with Private Health Insurance (Total have Hospital Cover)	46% (Aged 14+) Australian Prudential Regulation Authority June 2018	47% May/June 2018
	Households with Internet Connection (Household Penetration)	86% Australian Bureau of Statistics Catalogue No. 8146.0 12 months to June 2017	87% 12 months to June 2018
	Persons Purchasing or Ordering Goods or Services via the Internet for Private Use in last 3 months (% of Population)	63% (Aged 15+) Australian Bureau of Statistics Catalogue No. 8146.0 12 months to June 2017	62% (Aged 15+) 12 months to June 2018
	Cinema Attendance - Annual Visits	85.0 million Motion Picture Distributors Association of Australia 12 months to December 2017	94.6 million 12 months to June 2018 (87.6 million - 12 months to December 2017)
	Average Amount in Savings and Investments	\$250,000 Per Person Australian Bureau of Statistics Catalogue No. 5232.0 March 2018	\$272,900 Per Person 12 months to June 2018
	Percentage of Population with an Overweight Body Mass Index	Men - 42% Women - 29% (Aged 18+) Australian Bureau of Statistics Catalogue No. 4364.0 12 months to June 2015	Men - 40% Women - 27% (Aged 18+) 12 months to June 2018
	Total Kilometres Driven in Last 12 Months	250 billion kms Survey of Motor Vehicle Use Australian Bureau of Statistics Catalogue No. 9208.0 12 months to June 2016	256 billion kms 12 months to June 2018
	People Who Speak a Language Other Than English at Home	22.9% (Aged 14+) Australian Bureau of Statistics August 2016 Census	22.8% Quarter to June 2018
	Alcohol Consumption (Drunk Alcohol in last 7 days)	58% (Aged 18+) Australian Bureau of Statistics Catalogue No. 4364.0 12 months to June 2015	58% (Aged 18+) 12 months to June 2018
	Total Have a Smartphone as a main mobile phone (Household Penetration)	84% Australian Video Viewing Report Q4, 2017	82% Quarter to June 2018
	Trade Union Membership	1.5* million Australian Bureau of Statistics Catalogue No. 6333.0 August 2016 (*Note: In connection with main job)	2.0* million (Aged 15+) 12 months to June 2018 (*Note: In connection with any job)



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