

ROY
MORGAN

How we collect
and process
Single Source data
in Indonesia



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

In 2005 Roy Morgan Single Source was introduced in Indonesia. Since that time, we have conducted over 350,000 face-to-face interviews.

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 Indonesia.

Questionnaire Design

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

Responses

Door to door interviewing is conducted on weeknights and weekends. SCM's are left with respondents (or a member of the family prepared to assist the respondent). SCM is picked up approximately one week later at an agreed date and time.

Data Capture

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

Data Analysis

Data cleaning, processing and weighting takes place at this stage in Melbourne. Here we build Single Source databases for ASTEROID. We then distribute ASTEROID databases to our Jakarta office.

Survey Content

Establishment Survey and Self-Completion Material

- | | |
|--|--|
| <ul style="list-style-type: none">• Activities and Interests• Attitudes and Lifestyles• Bank Accounts• Business Decisions• Cinema Attendance• Country of Manufacture• Credit Cards• Demographics• Direct Investments & Investment Funds• Financial Institutions• Food Purchases/Consumption• Games Consoles• Holidays and Travel• Household Items / Appliances• Household Products Bought• Insurance• Internet Behaviour and Preferences• Job Satisfaction• Loans• Managed Funds• Magazine Readership• Media Most Useful• Media Preference by Daypart• Media Usage• Motor Vehicles | <ul style="list-style-type: none">• Newspaper Readership• Non-Alcoholic Beverages• Online Spending• Payment Methods• Pensions• Personal Products• Radio Diary• Radio Listening• Roy Morgan Values Segments*• Retail – Non-food Purchasing• Sectional Reading• Shares• Shopping Centres• Smoking• Sporting Participation• Supermarkets• Take Away Food• Telecommunications• Time Spent on Activities• TV Attention Level• TV Diary• TV Program Involvement• TV Viewing• Website Visitation |
|--|--|

Sampling Plan














| | |
|-----------------|--|
| Sample Size | <ul style="list-style-type: none"> • Over 20,000 per year and 5,000 per quarter • Continuous |
| Coverage | <ul style="list-style-type: none"> • 17 Provinces • 23 top cities • 24 other urban centres and 22 rural areas • Covering around 85% of the population aged 14+ |
| Schedule/Timing | <ul style="list-style-type: none"> • Weekly • 48 weeks per year (4 quarters x 12 weeks) • 2 visits per interview, 1 week apart |
| Household | <ul style="list-style-type: none"> • Indonesian residents aged 14+ in private households (excluding servants and visitors). • A single respondent is selected within each household based on random selection criteria (quotas apply to ensure age and gender equality and inclusion of less educated minorities). • Household selection follows strict protocols (including direction of household selection, skip intervals and necessary call backs). |
| Sampling | <ul style="list-style-type: none"> • In urban areas, each city/town is divided into municipalities (Kotamadya) and Kelurahan are randomly selected within each municipality dependent on sample size for each city/town. Within each selected Kelurahan a number of RT's (Rumah Tangga (Household)) are randomly selected, on an interval basis, dependent on the sample size required. • Rural Kelurahan are selected at least 50 kilometres outside the Top Twenty Two cities, and an appropriate distance from the 22 other urban centres, to ensure representation of rural communities. Within each selected Kelurahan a number of RT's are randomly selected, on an interval basis, dependent on the sample size required. |
| Weighting | <ul style="list-style-type: none"> • Quarterly by: - Geography - Age - Sex - Household size |
| Incentives | <ul style="list-style-type: none"> • Non-monetary incentives are provided to respondents on completion of the survey and pick-up of SCM Booklet 2. |



Processing

| | |
|-----------------------|--|
| Establishment Survey | <ul style="list-style-type: none">• Booklet 1 includes an administered section and a self-completion section.• Booklet 2 is self-completed by the respondent. |
| Interviewers | <ul style="list-style-type: none">• Interviewers are experienced and fully trained and briefed.• All field work is conducted under the direction of field supervisors, and• 40% of interviews are witnessed or back-checked. |
| Printing and Dispatch | <ul style="list-style-type: none">• Booklets are printed in Jakarta and dispatched from the field office.• Version control and inventory systems exist to ensure correct material is dispatched to ensure required field coverage. |
| Return Procedure | <ul style="list-style-type: none">• A pre-arranged visit is made for the interviewer to return to pick up and audit Booklet 2 after the respondent has completed it.• Unique identifying barcode recorded on return. |
| Data Capture | <ul style="list-style-type: none">• Jakarta• Stringent quality checks & balances throughout scanning process.• Utilise ReadSoft's Eyes & Hands 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 (Alchemy).• Any data of concern can be traced to the area and interviewer for clarification. |
| Data Processing | <ul style="list-style-type: none">• Melbourne, Australia.• Logical edit checks on the data.• Data cleaning according to documented procedures.• Questionnaire images examined to resolve data inconsistencies.• Data projected according to latest Indonesian population estimates.• Results validated against known industry population estimates.• ASTEROID database delivery allows 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 (Number of Employed Persons) | 106 million (Aged 15+) National Labour Force Survey BPS Statistics Indonesia February 2018 | 106 million (Aged 15+) Quarter to June 2018 |
|  | Labour Force Participation Rate | 69% (Aged 15+) National Labour Force Survey BPS Statistics Indonesia February 2018 | 67% (Aged 15+) Quarter to June 2018 |
|  | Number of People Attending School | 13.0 million (Aged 15+) National Labour Force Survey BPS Statistics Indonesia February 2018 | 13.1 million (Aged 15+) 12 months to June 2018 |
|  | Mobile Phone Ownership (% of Households) | 89% National Socio Economic Survey BPS Statistics Indonesia 2016 | 91% Quarter to June 2018 |
|  | Personal Computer Ownership (% of Households) | 19% National Socio Economic Survey BPS Statistics Indonesia 2016 | 19% 12 months to June 2018 |
|  | Internet Penetration (% of Total Population) | 51% (Aged 0+) Indonesia Association of Internet Providers June 2016 | 57% Quarter to June 2018 |
|  | Number of Customers Bank Rakyat Indonesia (BRI) | 55 million customers BRI 2016 | 52 million customers 12 months to June 2018 |
|  | Number of Savings Accounts Bank Rakyat Indonesia (BRI) | 58 million Savings Accounts BRI 2016 | 57 million Savings Accounts 12 months to June 2018 |
|  | Smoking Incidence | Adult Men – 57% Adult Women – 2% Aged (10+) Basic Health Research (RISKESDAS) 2013 | Adult Men - 54% Adult Women - 2% 12 months to June 2018 |
|  | Fixed Line Telephone Connected (% of Households) | 3% National Socio Economic Survey BPS Statistics Indonesia 2016 | 2% 12 Months to June 2018 |
|  | Number of Domestic Travellers of Air Transportation in the last 12 months | 3.7 million BPS Statistics Indonesia Quarter to June 2018 | 3.5 million 12 months to June 2018 |
|  | Presidential Election 2019* April 17, 2019 (% of electors 17+) *June 2019 Update | H. Prabowo Subianto 44.50% Ir. H. Joko Widodo 55.50% General Elections Commission of Indonesia May 21, 2019 www.kpu.go.id | H. Prabowo Subianto - 45.5% Ir. H. Joko Widodo - 54.5% Morgan Poll April 12, 2019 Finding No. 7939 |
|  | Pay TV Penetration (% of Households) | 8% Analysys Mason Indonesia 2016 | 8% Quarter to June 2018 |



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