

*Roy Morgan Research
and
Website visitation measurement*

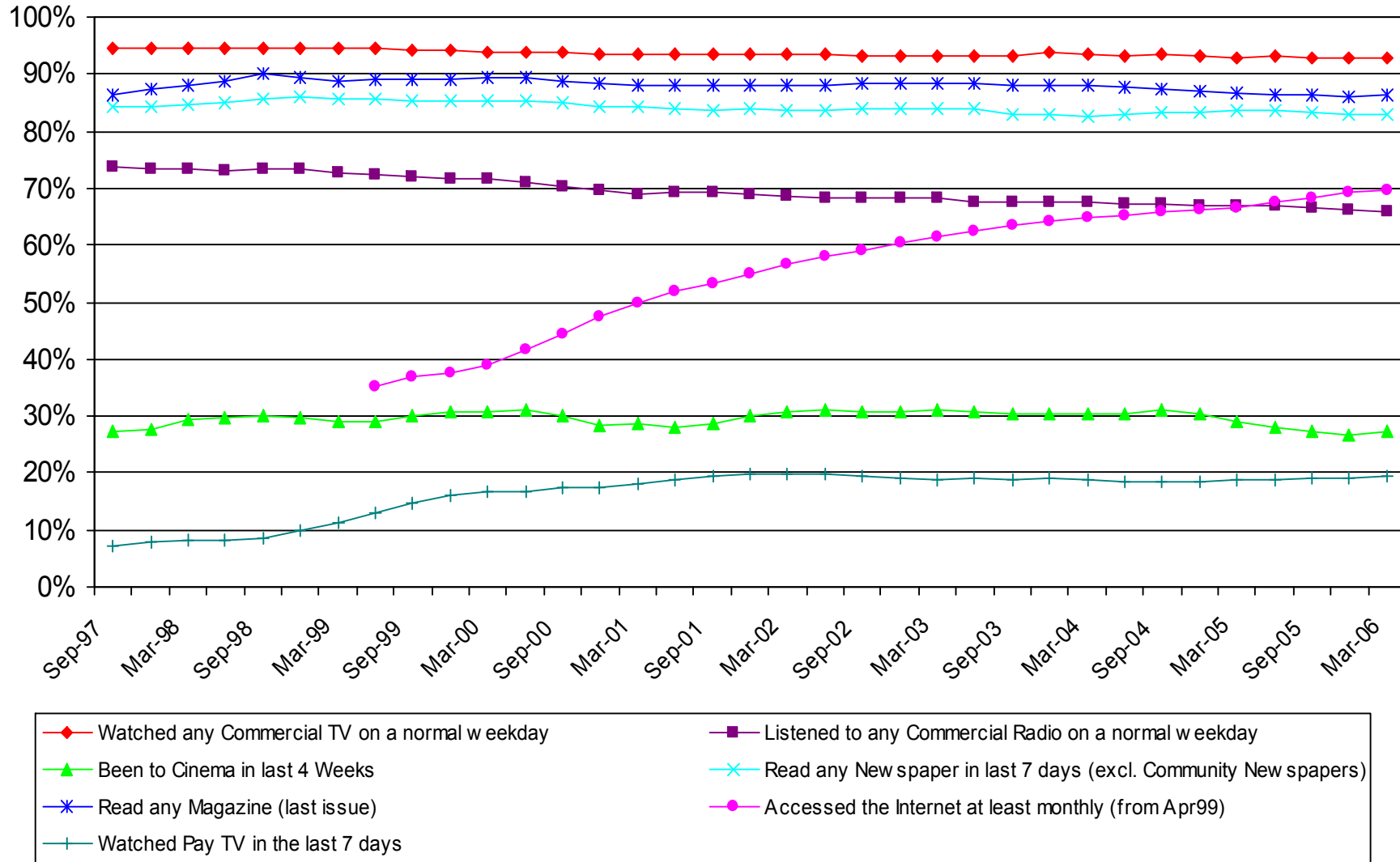
**2006 iMAT Conference
Sydney, Australia
July 20-21, 2006**

**By
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Roy Morgan Research**



Media consumption changes 1997 - 2005

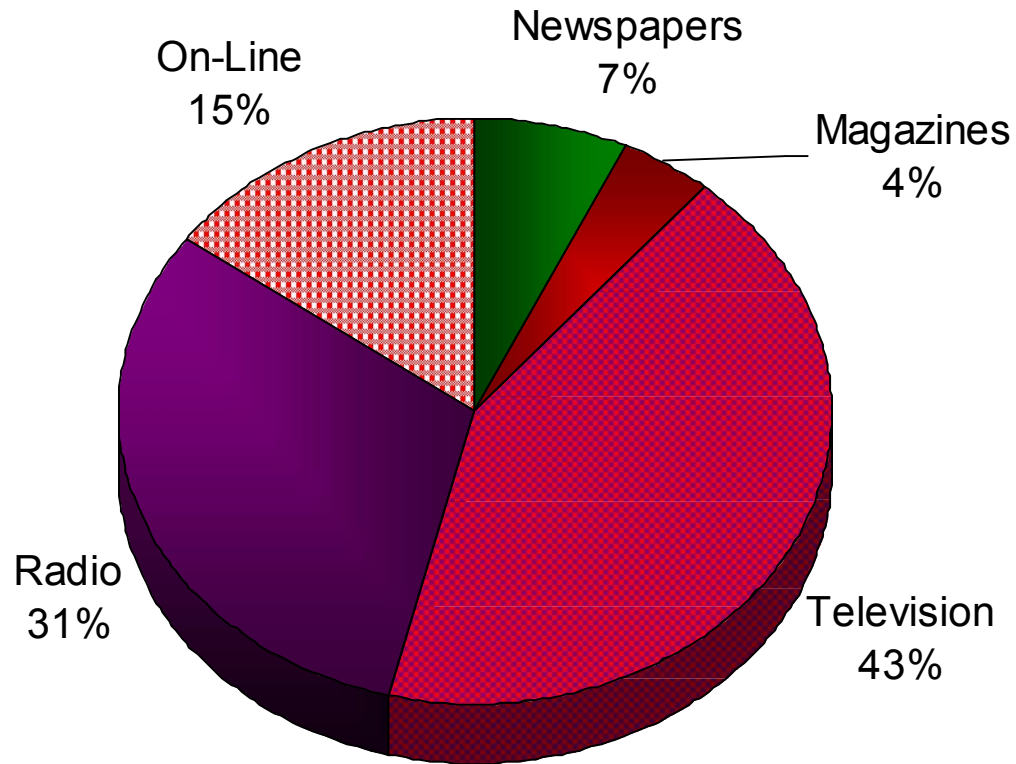
Roy Morgan
Research



Discover your edge

Time spent with media

% of media hours in average week



Time spent with media

Under 40's vs over 40's

(Hours per week)



	<40 yrs	40+ yrs
TV	19h 45m	23h 52m
Radio	12h 58m	17h 32m
Newspapers	2h 30m	4h 12m
Magazines	1h 44m	2h 2m
Internet	10h 16m	6h 2m
TOTAL	47h 13m	53h 39m

Roy Morgan Research

- **Australia's largest independent market research company**
 - Roy Morgan Single Source, Morgan Gallup Poll, etc
 - blue chip clients in readership, finance, automotive, tourism, retail, telecommunications, government, media, etc
 - information used by Reserve Bank, Productivity Commission Draft Report on Broadcasting , Financial Systems (Wallis) Inquiry, etc
 - also collecting data in US, UK, New Zealand and Indonesia

- **Over 60 years experience - talking to and understanding Australians**
 - what they eat, drink, drive, watch, read, buy
 - where they live, shop, holiday
 - how much they save and spend
 - how they view the world and who they will vote for
 - around 1100 interviews across Australia every weekend

Roy Morgan Website Monitor

- Representative sample of Australians, metro and country,
- 14 years and over
- Continuously collected
- Fully integrated on Agency Single Source databases

- Subscribed to by all major internet players:
 - ninemsn
 - Yahoo!7
 - Sensis
 - Fairfax Digital
 - News Interactive

- Ability to see cross visitation with competitor sites

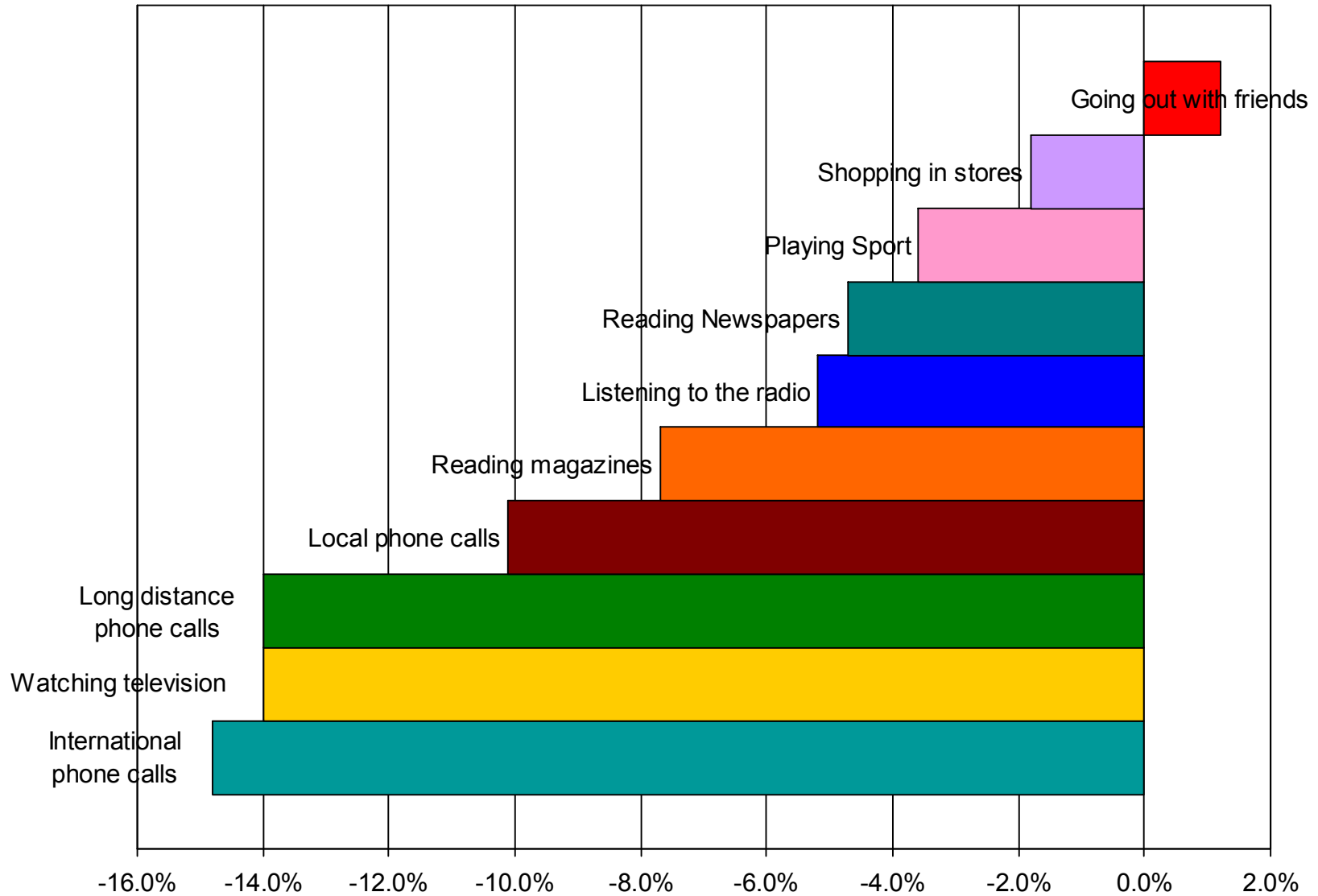
Roy Morgan Website Monitor

- Deep diagnosis by detailed demographics, Values Segments, Big Spenders, etc

- Target market analysis by consumption: intend to buy new car, mobile phone switchers, home loans over \$50k, high value travellers, etc

- Ability to cross-analyse by other media consumption:
 - Newspaper and Magazine readership
 - Television viewing
 - Radio listening
 - Cinema attendance
 - Outdoor activity
 - Addressed mail readership

% doing less since using internet



Newspapers are transforming rather than disappearing

Sydney Morning Herald

	2003 '000	2006 '000	% Difference
Monday - Friday av. Issue readership	879	879	0%
Newspaper only	683	637	- 7%
smh.com.au only	299	457	+ 53%
Both newspaper & online	196	242	+ 23%
TOTAL READERS	1178	1336	+ 13%

Socially Aware **Top Internet Sites x Reach**

**% SA Visited
Site in Last 4
Weeks**

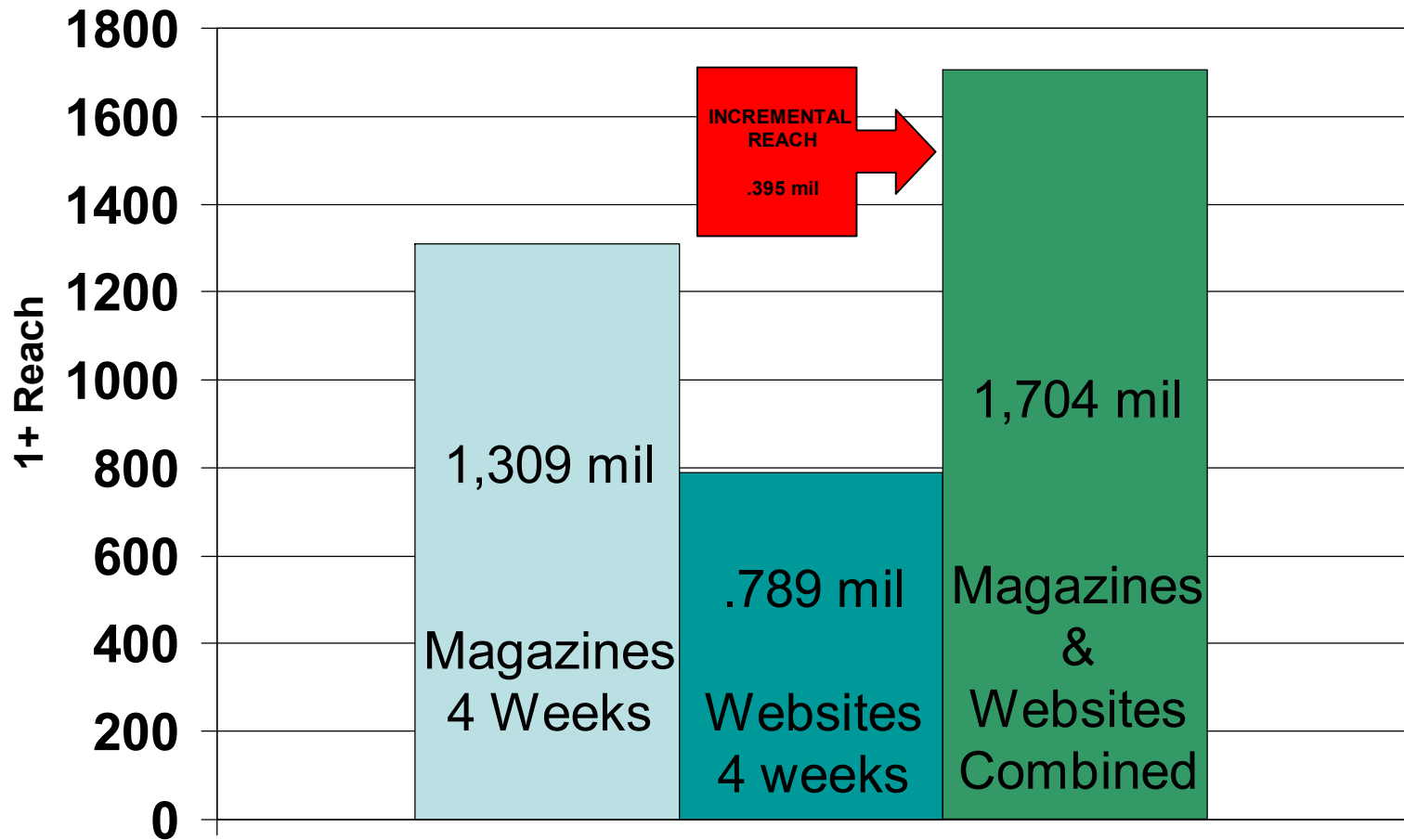
Google [all-sites]	73.5%
WhitePages Online [all-sites]	35.1%
ebay.com.au [all-sites]	27.6%
Hotmail (ninemsn) [all-sites]	25.9%
YellowPages Online [all-sites]	24.2%
qantas.com.au [all-sites]	20.6%
commbank.com.au [all-sites]	19.1%
virginblue.com.au [all-sites]	17.2%
BigPond Email [all-sites]	16.6%
Yahoo! Search [all-sites]	15.6%

Socially Aware

Top 10 Internet Sites x Index

	% SA Visited Site in Last 4 Weeks	Indexed to Last 4 Week Internet Users
the age.com.au	11.30%	222
abc.net.au/news	14.60%	208
smh.com.au (Sydney Morning Herald)	12.00%	202
abc.net.au/tv	10.10%	194
qantas.com.au	20.60%	163
WhitePages Online	35.10%	160
domain.com.au	11.30%	155
YellowPages Online	24.20%	153
anz.com	13.10%	150
virginblue.com.au	17.20%	143

Extend reach into the overseas travellers market by adding websites



- Magazine Schedule: Good Weekend [4], Australian Magazine [4], Who [4], Qantas Australian Way [1]
- Websites: smh.com.au, Wotif.com. Yahoo!7Search

Of those 789,000 intending overseas travellers

who have visited smh.com.au, Wotif.com & Yahoo!7Search
in the last 4 weeks:

- **59%** (464,000) have **not** seen a movie in the last 4 weeks
- **78%** (612,000) have **not** watched subscription TV in the last 7 days
- **34%** (272,000) do **not** listen to commercial radio on a normal weekday
- **19%** (149,000) have **not** read any catalogue in the last 4 weeks

In Summary

- **Media is a business - the transactions are advertisements**
- **Everything we know about advertising says it is noticed more by those in the market for the product advertised**
- **That means simple traffic counts are insufficient**
- **The better that website visitation can be matched to a given target audience, the greater the likelihood the ads will work**
- **Real connection is an outcome of thorough consumer understanding**

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