

ROY
MORGAN

How we collect
and process
Single Source data
in Australia

July 2020



About Roy Morgan



Roy Morgan is the largest and longest established Australian market research company, with nearly 80 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 consumer and business 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 accurate information, quality consultancy and continuity of service to all clients.

A commitment to quality service and data security is fundamental to the way we do research. We are certified to the AS/NZS ISO9001 Quality Management Systems standard, AS ISO 20252 Market, Opinion and Social Research standard and ISO27001 Information Security Standard. Our commitment to quality standards and continuous improvement 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 stage involves the design and implementation of survey questions into our weekly Establishment Surveys (ES) and accompanying Self-Completion Materials (SCM). The Roy Morgan Single Source surveys are modular in format designed to optimise the user experience.

Interviewing Approach

The Establishment Survey is conducted as a personal interview with Australians in their own home using a computer (Computer Assisted Telephone Interviewing or CATI, or Computer Assisted Personal Interviewing or CAPI). It gathers a range of important profiling information about the individual and key industry metrics used for weighting and calibration purposes. All respondents are invited to complete and return the accompanying online or hardcopy SCM's post the initial establishment interview.

Sampling Approach

An address based stratified random probability sample design is used to identify potential respondents and to provide a representative sample of Australians aged 14+. Boost surveys are conducted to reach some difficult populations.

Data Capture

Interviews are conducted on a weekly basis with approximately 50,000 surveys being completed annually. Many of these respondents also complete and return their SCM's, approximately 20,000. All information collected is stored securely on our servers.

Data Analysis

Data processing, weighting as well as integration with machine based digital data takes place at this stage. Here we build Single Source databases for ASTEROID and create reports and dashboards, reflecting current and changing behaviours and attitudes of the Australian population, for local and international clients.

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
Schedule/Timing	<ul style="list-style-type: none"> • Weekly • 50 weeks per year • CATI: Contact is made on weeknights and during the day on Saturday and Sunday • CAPI: Weekend interviewing only
Respondent Selection	<ul style="list-style-type: none"> • People 14+ • Landline numbers or CAPI: youngest person in household available during the survey period. 1 person per household. • Mobile numbers: Mobile owner
Sample Frame	<ul style="list-style-type: none"> • Address based, random probability sample selection. • CATI only: 10% boosted sample for difficult populations. Dual frame 70% mobile; 30% landline. Up to 5 call backs throughout the week
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

Survey Content

Establishment Survey n = 50,000	
<ul style="list-style-type: none"> • Alcohol • Business Confidence • Consumer Confidence • Demographics • Finance Monitor • Gambling • Inflation Expectations 	<ul style="list-style-type: none"> • Media Metrics • Motor Vehicles • Music • Smoking • Telecommunications • Roy Morgan Values Segments* • Voting
Self-Completion Material Modular n = 12,000 - 20,000	
<ul style="list-style-type: none"> • Activities • Alcoholic beverages • Apps • Catalogues • Charities • Cinema • Demographics • Food & Beverages • Finance Monitor • Gambling • Gaming • Grocery Shopping • Health • Holidays & Travel • Household Items • Interests & Opinions • Letterbox items 	<ul style="list-style-type: none"> • Loyalty Programs • Media Metrics • Motor Vehicles • Music • News sources • Outdoor Advertising • Personal Products • Risk Monitor • Radio • Retail • Sports • Technology • Telecommunications • TV & Streaming • Utilities • Websites & Online Activities • You & Your Home
















* Devised by Michele Levine of Roy Morgan Research and Colin Benjamin of the Horizons Network



Processing

Establishment Survey	<ul style="list-style-type: none"> • Interviews are conducted with Respondents in their home using a computer (Computer Assisted Telephone Interviewing or CATI, or Computer Assisted Personal Interviewing or CAPI).
Interviewers	<ul style="list-style-type: none"> • Experienced Interviewers • 75% of interviews conducted by Interviewers with more than 12 months experience • Fully briefed • Confidentiality agreements • Weekly and monthly reports on Interviewer Performance from Field Management and Quality Systems
Validation	<ul style="list-style-type: none"> • CAPI: Audit call conducted with over 90% of respondents each week • CATI: Live monitoring of 10% of calls using audio visual monitoring
Self-Completion Material (SCM)	<ul style="list-style-type: none"> • Respondents are invited to accept the SCM's at end of Establishment Survey Interview • Completed and submitted by Respondent post interview. • SCM may be completed online or via hardcopy
SCM Completion Procedure	<ul style="list-style-type: none"> • Reminders are undertaken by email and/or telephone to improve completion rate for SCM's • 1800 help line available to participants • Completions recorded and graded
Data Capture	<ul style="list-style-type: none"> • All information collected is stored securely on Roy Morgan servers • Machine based data collected via Roy Morgan proprietary opt in Web Audience Measurement (WAM) panel • Enhanced machine based measurements of digital and physical behavior's is drawn from a collection of trusted data collection partners
Data Processing	<ul style="list-style-type: none"> • Establishment interview matched to completed SCM's • Logical edit checks on the data • Data cleaning according to documented procedures • 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 • Monthly Early Indicators report available for key metrics

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)



www.roymorgan.com

Tonic House, 386 Flinders Lane Melbourne 3000 G.P.O. Box 2282 Melbourne Victoria 3001 Australia
Tel: +61 3 9629 6888 Fax: +61 3 9629 1250 Email: askroymorgan@roymorgan.com

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