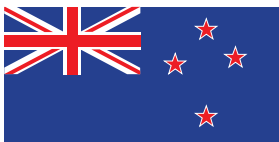


ROY  
MORGAN

How we collect  
and process  
Single Source data  
in New Zealand



# 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.

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.

\* August 2019



## Single Source Flow Chart

How we obtain and interpret our information for New Zealand.

- Questionnaire Design** This phase involves the design and production of what we call weekly Establishment Surveys (ES) which are interviewer administered by telephone. Also, at this stage we produce monthly self-completion online surveys.
- Responses** Telephone interviewing is conducted on weeknights and weekends. Respondents are then invited to participate in the self-completion online survey.
- Data Capture** At this point, self-completion online survey data is retrieved and stored via the Conformat Horizons platform.
- Data Analysis** Data cleaning, processing and weighting takes place at this stage. Here we build Single Source databases for ASTEROID and create hardcopy reports. We then distribute reports and ASTEROID databases to local and international clients.

# Survey Content

## Self-Completion Material

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• Accounts (Banking)</li><li>• Activities and Interests</li><li>• Air Travel</li><li>• Alcoholic Beverages</li><li>• Apps Downloaded</li><li>• Attitudes and Lifestyles</li><li>• Business Decisions</li><li>• Catalogues</li><li>• Cinema Attendance</li><li>• Credit Cards</li><li>• Demographics</li><li>• Financial Institutions</li><li>• Food Purchases</li><li>• Health Issues</li><li>• Holidays and Travel</li><li>• Household Items / Appliances</li><li>• Household Products Bought</li><li>• Insurance</li><li>• Internet Activities</li><li>• Internet Behaviour and Preferences</li><li>• Loans</li><li>• Magazine Readership</li><li>• Media Most Useful</li></ul> | <ul style="list-style-type: none"><li>• Media Preference by Daypart</li><li>• Media Usage</li><li>• Motor Vehicles</li><li>• Newspaper Readership</li><li>• Non-Alcoholic Beverages</li><li>• Outdoor Advertising</li><li>• Pay TV, Subscription TV, Video on Demand</li><li>• Personal Products</li><li>• Personal Services</li><li>• Radio Listening</li><li>• Retail – Non-food Purchasing</li><li>• Roy Morgan Values Segments*</li><li>• Sectional Reading of Newspapers</li><li>• Sporting Participation</li><li>• Superannuation</li><li>• Supermarkets</li><li>• Take Away Food</li><li>• Telecommunications</li><li>• TV Program Involvement</li><li>• TV Viewing</li><li>• Utilities</li><li>• Website Visitation</li></ul> |
|---|---|

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

# Sampling Plan













Sample Size	<ul style="list-style-type: none"><li>• n = 7,000 per year (approx)</li></ul>
Coverage	<ul style="list-style-type: none"><li>• North Island and South Island</li><li>• 16 Regional Council areas</li></ul>
Schedule/Timing	<ul style="list-style-type: none"><li>• Conducted weekly</li><li>• 48 weeks per year (12 months x 4 weeks)</li><li>• Calls made Monday to Sunday, 5-9 pm weekdays and 12:30pm-4:30pm weekends</li></ul>
Household	<ul style="list-style-type: none"><li>• People 14+ • Private households</li><li>• With telephone or mobile phone</li><li>• Individual selection – youngest person in household</li></ul>
Sampling	<ul style="list-style-type: none"><li>• Random Digit Dialling • Minimum of 3 calls to establish contact</li><li>• Automated sample controlled via CATI system • Automated dialling</li><li>• Automated programming via CATI to ensure sample returned different times and days</li></ul>
Weighting	<ul style="list-style-type: none"><li>• Quarterly by: - Area - Age - Sex - Household size</li><li>• Source: Statistics New Zealand</li></ul>
Incentives	<ul style="list-style-type: none"><li>• Monthly prize draw \$500</li></ul>



## Processing

Recruitment/ Establishment Survey	<ul style="list-style-type: none"><li>• Melbourne, Australia</li><li>• Computer Assisted Telephone Interviewing (CATI)</li><li>• Survey content - Survey &amp; Incentive explanation - Demographics</li></ul>
Interviewers	<ul style="list-style-type: none"><li>• Experienced CATI interviewers</li><li>• Fully briefed</li><li>• Supervisors manage an average of 10 -15 interviewers per shift</li><li>• Payment based on a combination of minimum hourly award and incentive system</li><li>• Confidentiality agreements</li><li>• Approximately 10% of interviews audited (on screen and listen in)</li></ul>
Self-Completion Online Survey	<ul style="list-style-type: none"><li>• Designed Melbourne, Australia</li><li>• Dispatched electronically throughout New Zealand</li><li>• Self-Completion Online Survey (CAWI - Computer Assisted Web Interviewing)</li><li>• Up to 3 e-mail reminders to improve response rate</li><li>• Conformat Horizons software used for Web-based information retrieval and storage</li></ul>
Data Processing	<ul style="list-style-type: none"><li>• Logical edit checks on the data</li><li>• Data cleaning according to documented procedures</li><li>• Provision for imputation of missing data</li><li>• Data projected according to latest Statistics New Zealand population estimates</li><li>• Results validated against known industry estimates</li><li>• ASTEROID database delivery provides easy data retrieval</li></ul>

# 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)	2.6 million Household Labour Force Survey Statistics New Zealand Quarter to June 2018 (Aged 15+)	2.5 million Quarter to June 2018 (Aged 15+)
	Average Weekly Income (All Sources) - Annualised	\$44,668 Labour Market Statistics (Income) Statistics New Zealand Quarter to June 2018 (Aged 15+)	\$43,741 Quarter to September 2018 (Aged 15+)
	Average Household Income (All Sources) Annualised (Note: Households with at least one person aged 18-64).	\$104,104 Labour Market Statistics (Income) Statistics New Zealand, Quarter to June 2018	\$105,127 (Aged 15+) 12 Months to June 2018
	Alcohol Consumption by Gender (Drunk alcohol in the last 12 months)	Male - 84% Female - 75% New Zealand Health Survey (2016/2017) Ministry of Health (Aged 15+)	Male - 82% Female - 76% Quarter to June 2018 (Aged 18+)
	Number of Registered Vehicles	3.6 million New Zealand Transport Agency June 2018 (Note: Excludes Rental Cars/Trailers/Caravans)	3.6 million 12 months to June 2018
	Tablet Computer Penetration (% of Population)	51% research New Zealand Survey of New Zealanders' Use of Smartphones and other Mobile Communication Devices 2015	52% 12 months to June 2018
	Households with Internet Connection	1.524 million Statistics New Zealand Internet Service Provider Survey June 2018	1.572 million Quarter to June 2018
	Total Have a Smartphone as a main Mobile phone	70% research New Zealand Survey of New Zealanders' Use of Smartphones and other Mobile Communication Devices 2015	79% Quarter to June 2018
	Pet Ownership (% of Households)	Cat - 44% Dog - 28% Companion Animals in New Zealand 2016 New Zealand Companion Animal Council	Cat - 43% Dog - 26% Quarter to June 2018
	Total listened to Radio in last 7 days	81% (Aged 10+) Total New Zealand Commercial Radio - Survey 1 2018 GFK New Zealand	78% 12 months to June 2018
	Average Amount in Savings and Investments	\$226,230 Per Person Reserve Bank of New Zealand June 2018	\$223,506 Per Person 6 months to June 2018
	Percentage of Population with an overweight Body Mass Index	Men - 39.1% Women - 29.9% New Zealand Health Survey (2016/2017) Ministry of Health (Aged 15+)	Men - 36.5% Women - 29.1% 12 months to June 2018 (Aged 18+)



**[www.roymorgan.com](http://www.roymorgan.com)**

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

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