



Roy Morgan Research Pty. Ltd.
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NEW ROY MORGAN READERSHIP SERVICE – INTRODUCING THE “TOP 1%” READERSHIP SURVEY

November 16, 2005

To Whom It May Concern

Roy Morgan Research launches its new Readership Service – the ‘Roy Morgan “Top 1%” Readership Survey’. The “Top 1%” are the most senior Executives and Directors (defined as those individuals in the top six occupation classes - Chairman/Managing Director, Other Director, Owner/Partner/Proprietor, General Manager, Member of Management Board/Executive Committee, Company Accountant/Treasurer/Company Secretary) and earning \$120,000 or more per annum, who comprise 1% of the Australian population.

Please find below the first Media Release based on this data.

Newspapers on the way out? Not for the 166,000 Australians who comprise the “Top 1%” of the population

The “Top 1%” of the market– some 166,000 Australians who are the most senior Executives and Directors, and earning \$120,000 or more per annum - are seen as crucial to the success of newspapers. In an exclusive analysis of the readership behaviour of over 1,000 of the “Top 1%” of the population, the ‘Roy Morgan “Top 1%” Readership Survey’ shows high levels of newspaper readership - and that at the “Top 1%” newspaper readership is even higher among “Heavy Internet Users”.

An average weekday issue of the Financial Review, which tops the list, is read by an estimated 41,000 of the “Top 1%”, while on Friday the Financial Review is read by 46,000, and 53,000 read at least one issue of the publication in an “average” week.

While weekday reading of the Financial Review among the “Top 1%” is well above that of The Australian (41,000 cf. 18,000), weekend editions of each paper shows the reverse – 27,000 of the “Top 1%” read The Weekend Australian, compared with 19,000 for the weekend edition of the Financial Review.

The Sydney Morning Herald has a Monday-Friday “average issue” readership of 33,000 of the “Top 1%”, Saturday readership of 41,000 and Sunday readership of 33,000, bringing the net Monday-Sunday readership to 55,000, almost double that of the Daily Telegraph (net Monday-Sunday readership of 30,000).

In Melbourne, The Age attracts a Monday-Friday “average issue” readership of 19,000 of the “Top 1%” compared to 14,000 for the Herald Sun. Saturday readership of The Age is also higher than that of the Herald Sun amongst this group (23,000 compared with 13,000). However, readership of the Sunday Age and the Sunday Herald Sun is about the same (16,000 compared with 15,000).

Table 1. Readership of Major Newspapers by Day of the Week

	M-F Average Issue Readership	M-F Read any Issue	M-S ¹ Read any Issue	DAY-BY-DAY READERSHIP						
				M	T	W	Th	F	Sa	Su
Financial Review	41,000	53,000	58,000	39,000	39,000	40,000	39,000	46,000	19,000	N/A
Sydney Morning Herald	33,000	39,000	55,000	34,000	33,000	32,000	31,000	34,000	41,000	33,000 ²
Age	19,000	23,000	27,000	18,000	20,000	18,000	20,000	20,000	23,000	16,000 ³
Australian	18,000	26,000	38,000	17,000	17,000	18,000	20,000	21,000	27,000	N/A
Herald Sun	14,000	17,000	22,000	14,000	13,000	14,000	13,000	14,000	13,000	15,000 ⁴
Daily Telegraph	14,000	16,000	30,000	13,000	14,000	13,000	13,000	15,000	10,000	21,000 ⁵

So what impact, if any, is the Internet having on the readership behaviour of this key group of Australians? Not only is the Internet not replacing readership of newspapers, those in the “Top 1%” who are also “Heavy Internet Users” (use the Internet 8+ times per week – 55% of the “Top 1%”) are actually *more* likely to be readers of all of the major dailies, most Newspaper Inserted Magazines and most Business Magazines. Thirty four percent of “Heavy Internet Users” in the “Top 1%” read the Financial Review, 22% read The Sydney Morning Herald, 16% read The Age and 12% read The Australian.

Table 2. M-F Average Issue Readership of Major Newspapers by Internet Usage

	M-F Average Issue Readership			
	Total “Top 1%”		“Top 1%”	
	(Number)	(%)	Heavy Internet Users (%)	Others (%)
Financial Review	41,000	24	34	13
Sydney Morning Herald	33,000	20	22	18
Age	19,000	12	16	6
Australian	18,000	11	12	9
Herald Sun	14,000	8	9	7
Daily Telegraph	14,000	8	9	7

Table 3. Average Issue Readership of Weekend Newspapers by Internet Usage

	Average Issue Readership			
	Total “Top 1%”		“Top 1%”	
	(Number)	(%)	Heavy Internet Users (%)	Others (%)
Saturday Sydney Morning Herald	41,000	25	27	23
Sunday Sun-Herald	33,000	20	24	16
Weekend Australian	27,000	16	18	14
Saturday Age	23,000	14	16	11
Sunday Telegraph	21,000	13	15	10
Weekend Financial Review	19,000	11	15	7
Sunday Age	16,000	10	13	7
Sunday Herald Sun	15,000	9	10	7
Saturday Herald Sun	13,000	8	9	7
Saturday Daily Telegraph	10,000	6	6	6

¹ Indicates Monday to Saturday reading for the Financial Review and The Australian, and Monday to Sunday reading for all other titles listed.

² Sunday Sun Herald

³ Sunday Age

⁴ Sunday Herald Sun

⁵ Sunday Telegraph

Newspaper Inserted Magazines are also popular amongst the “Top 1%”. Good Weekend attracts significantly more readers from the “Top 1%” than does the next most popular Newspaper Inserted Magazine for this group, Sunday Life. Good Weekend has an “average issue” readership of 55,000 of the “Top 1%” followed by 33,000 for Sunday Life.

“Average issue” readership of the Financial Review Magazine is 29,000 amongst the “Top 1%”, while The Weekend Australian Magazine has an “average issue” readership of 25,000, as does Sunday Magazine, and Boss has 19,000. In terms of Newspaper Inserted Magazines, the “Top 1%” who are “Heavy” users of the Internet are more likely than other members of the “Top 1%” to read most of the Newspaper Inserted Magazines measured – 38% read Good Weekend and 25% read Sunday Life.

Table 4. Average Issue Readership of Newspaper Inserted Magazines by Internet Usage

	Average Issue Readership			
	Total “Top 1%”		“Top 1%”	
	(Number)	(%)	Heavy Internet Users (%)	Others (%)
Good Weekend	55,000	33	38	28
Sunday Life	33,000	20	25	13
Financial Review Magazine	29,000	18	21	13
Weekend Australian Magazine	25,000	15	17	13
Sunday Magazine	25,000	15	17	12
Boss	19,000	12	17	6
Sunday Telegraph TV Guide	14,000	9	9	8
Sydney Magazine	12,000	7	9	6
Age Melbourne Magazine	10,000	6	8	4
Sunday Herald Sun TV Guide	8,000	5	6	3

In terms of Business Magazines, BRW has an “average issue” readership of 26,000 of the “Top 1%” – around twice the number of the Bulletin (15,000) and Time (12,000). The Qantas in-flight magazine The Australian Way has an “average issue” readership of 30,000 amongst this group, while competitive titles Voyeur (Virgin Blue) and Jetstar attract relatively few of the “Top 1%” (5,000 and 3,000 respectively). Investment magazines Personal Investor has an “average issue” readership of 9,000, while Money Magazine and Shares each attract 8,000, and Wealth Creator Magazine has fewer readers who are in the “Top 1%” (4,000). “Heavy” Internet Users among the “Top 1%” are more likely to be readers of The Australian Way (22%), BRW (18%), The Bulletin (10%) and Time (10%), and most other business titles.

Table 5. Average Issue Readership of Business Magazine by Internet Usage

	Average Issue Readership			
	Total “Top 1%”		“Top 1%”	
	(Number)	(%)	Heavy Internet Users (%)	Others (%)
Qantas The Australian Way	30,000	18	22	14
BRW	26,000	16	18	13
Bulletin	15,000	9	10	9
Time	12,000	8	10	5
Personal Investor	9,000	5	7	3
Shares	8,000	5	8	2
Money Magazine	8,000	5	7	2
New Scientist	5,000	3	4	2
Voyeur (Virgin Blue InFlight)	5,000	3	5	*
Wealth Creator Magazine	4,000	2	2	2
Jetstar	3,000	2	3	*

* indicates less than 0.5%

The above findings are drawn from the 'Roy Morgan "Top 1%" Readership Survey', as part of which 1,014 of the "Top 1%" of Australians were interviewed between October 2003 and September 2005. The "Top 1%" are defined as those individuals in the top six occupation classes (Chairman/Managing Director, Other Director, Owner/Partner/Proprietor, General Manager, Member of Management Board/Executive Committee, Company Accountant/Treasurer/Company Secretary) and earning \$120,000 or more per annum, and comprise 1% of the Australian population.

Also attached are the following important papers which cover readership issues:

"Readers-per-copy: beyond the phony figure debate to understanding reader choice and how to drive it your way"

By Gary Morgan, Michele Levine and Marcus Tarrant

Presented to the Worldwide Readership Research Symposium at Cambridge, Massachusetts, USA, October 26-29, 2003.

<http://www.roymorgan.com/resources/pdf/papers/20031001.pdf>

"Are you going by the numbers? IF YES: Are they the right numbers?"

By Michele Levine, Gary Morgan

Presented at International Herald Tribune Media, Planning and Research in Asia – Challenging Perspectives. Media Research Methodology – Time To Rejuvenate? Hong Kong and Singapore, October 12 and 14, 2004

<http://www.roymorgan.com/resources/pdf/papers/20041004.pdf>

"A New Method to Measure Media Casualness for Magazines and Newspapers".

By Gary Morgan, Michele Levine and Sergey Dorofeev

Presented at 10th Worldwide Readership Symposium, Venice, October 21-26, 2001

<http://www.roymorgan.com/resources/pdf/papers/20011005.pdf>

"Single Source – The Problem Solver"

By Strategic Director Multi-Media Development, Roy Morgan Research

July 31, 2000

<http://www.roymorgan.com/news/papers/2000/20000702/>

"A Fresh Look At Estimating Readership Frequency Distributions – Modelling readership and exposure distributions using a 'frequency' question"

By Gary Morgan, Michele Levine and Sergey Dorofeev

Presented at Worldwide Audience Measurement Conference June 13-18, 2004

<http://www.roymorgan.com/resources/pdf/papers/20040606.pdf>

"A New Approach In Audience Measurement For Print Media"

By Roy Morgan

Presented at ESOMAR Seminar 'Improving Media Research' April, 1982

<http://www.roymorgan.com/resources/pdf/papers/19820402.pdf>

"It's Time? Sectional Readership Data for Newspapers"

By Gregory Hywood and William Burlace

Presented at the Australian Newspaper Industry Forum ANIF 5, February 12, 2004

<http://www.roymorgan.com/documents/ANIFSectionalReadershipPaper.pdf>

“How a Composite Method Has Overcome Telescoping, Prestige and Replication in Readership Research”

By Roy Morgan

June, 1983

<http://www.roymorgan.com/resources/pdf/papers/19830601.pdf>

“The Accumulation of Audiences for Australian Publications”

By Christopher Fry

February, 1972

<http://www.roymorgan.com/resources/pdf/papers/19720201.pdf>

“Reading: looking into ... logging onto”

By Michele Levine, Gary Morgan, Marcus Tarrant, Nicola Hepenstall and William Burlace
Presented to the Worldwide Readership Research Symposium at Cambridge, Massachusetts, USA, October 26-29, 2003.

<http://www.roymorgan.com/resources/pdf/papers/20031002.pdf>

Yours sincerely,



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