Roy Morgan Research and Website visitation measurement

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Sydney, Australia
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By
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Roy Morgan Research
Media consumption changes
1997 - 2005

- Watched any Commercial TV on a normal weekday
- Listened to any Commercial Radio on a normal weekday
- Been to Cinema in last 4 Weeks
- Read any Newspaper in last 7 days (excl. Community Newspapers)
- Read any Magazine (last issue)
- Accessed the Internet at least monthly (from Apr99)
- Watched Pay TV in the last 7 days
Time spent with media

% of media hours in average week

- Television: 43%
- Radio: 31%
- On-Line: 15%
- Newspapers: 7%
- Magazines: 4%

Source: Roy Morgan Research, March 2006
## Time spent with media

### Under 40’s vs over 40’s

(Hours per week)

<table>
<thead>
<tr>
<th></th>
<th>&lt;40 yrs</th>
<th>40+ yrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>19h 45m</td>
<td>23h 52m</td>
</tr>
<tr>
<td>Radio</td>
<td>12h 58m</td>
<td>17h 32m</td>
</tr>
<tr>
<td>Newspapers</td>
<td>2h 30m</td>
<td>4h 12m</td>
</tr>
<tr>
<td>Magazines</td>
<td>1h 44m</td>
<td>2h 2m</td>
</tr>
<tr>
<td>Internet</td>
<td>10h 16m</td>
<td>6h 2m</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>47h 13m</strong></td>
<td><strong>53h 39m</strong></td>
</tr>
</tbody>
</table>

Source: Roy Morgan Single Source, March 2006
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

Source: Roy Morgan Single Source, March 2006
Newspapers are transforming rather than disappearing

**Sydney Morning Herald**

<table>
<thead>
<tr>
<th></th>
<th>2003 '000</th>
<th>2006 '000</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday - Friday av. Issue readership</td>
<td>879</td>
<td>879</td>
<td>0%</td>
</tr>
<tr>
<td>Newspaper only</td>
<td>683</td>
<td>637</td>
<td>-7%</td>
</tr>
<tr>
<td>smh.com.au only</td>
<td>299</td>
<td>457</td>
<td>+53%</td>
</tr>
<tr>
<td>Both newspaper &amp; online</td>
<td>196</td>
<td>242</td>
<td>+23%</td>
</tr>
<tr>
<td>TOTAL READERS</td>
<td>1178</td>
<td>1336</td>
<td>+13%</td>
</tr>
</tbody>
</table>

# Socially Aware

## Top Internet Sites x Reach

<table>
<thead>
<tr>
<th>Site</th>
<th>% SA Visited Site in Last 4 Weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google [all-sites]</td>
<td>73.5%</td>
</tr>
<tr>
<td>WhitePages Online [all-sites]</td>
<td>35.1%</td>
</tr>
<tr>
<td>ebay.com.au [all-sites]</td>
<td>27.6%</td>
</tr>
<tr>
<td>Hotmail (ninemsn) [all-sites]</td>
<td>25.9%</td>
</tr>
<tr>
<td>YellowPages Online [all-sites]</td>
<td>24.2%</td>
</tr>
<tr>
<td>qantas.com.au [all-sites]</td>
<td>20.6%</td>
</tr>
<tr>
<td>commbank.com.au [all-sites]</td>
<td>19.1%</td>
</tr>
<tr>
<td>virginblue.com.au [all-sites]</td>
<td>17.2%</td>
</tr>
<tr>
<td>BigPond Email [all-sites]</td>
<td>16.6%</td>
</tr>
<tr>
<td>Yahoo! Search [all-sites]</td>
<td>15.6%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan Single Source, March 2006
## Socially Aware
### Top 10 Internet Sites x Index

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

Source: Roy Morgan Single Source, March 2006
Extend reach into the overseas travellers market by adding websites

Magazines

1,309 mil

4 Weeks

.789 mil

Websites

1,704 mil

Magazines & Websites Combined

INCREMENTAL REACH

.395 mil

Source: Roy Morgan Single Source, March 2006

Magazine Schedule: Good Weekend [4], Australian Magazine [4], Who [4], Qantas Australian Way [1]

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

Source: Roy Morgan Single Source, March 2006
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

Source: Roy Morgan Single Source, March 2006