WILL THE WORM POINT YOU IN THE RIGHT DIRECTION?
Aussie Rules watched by

7,880,000 Americans
5,328,000 Australians
Money is No. 1 worry today

Making both ends meet is the most frequent cause of worry these days, the Gallup Poll finds.

In the last two years the family budget has replaced fear of war as the chief source of worry.

People are handed a card listing six things which often cause worry.

Their answers—some people have more than one worry—are:

- The family budget: 44
- Ill-health: 26
- Possibility of world war: 20
- Housing: 16
- Possible unemployment: 13
- Old-age security: 10

Men and women gave much the same answers, except that the family budget was mentioned by 53 per cent of women, compared with 36 per cent of men.

Comparison of 1950 1952

<table>
<thead>
<tr>
<th></th>
<th>1950</th>
<th>1952</th>
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<tbody>
<tr>
<td>Budget</td>
<td>29</td>
<td>44</td>
</tr>
<tr>
<td>Ill-health</td>
<td>17</td>
<td>44</td>
</tr>
<tr>
<td>War</td>
<td>18</td>
<td>20</td>
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<tr>
<td>Housing</td>
<td>18</td>
<td>16</td>
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<tr>
<td>Unemployment</td>
<td>4</td>
<td>13</td>
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<tr>
<td>Old age</td>
<td>12</td>
<td>10</td>
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</tbody>
</table>

This table shows how closely we agree with our Canadian cousins:

HUSBANDS AND WIVES

<table>
<thead>
<tr>
<th></th>
<th>p.c.</th>
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<tbody>
<tr>
<td>Together</td>
<td>78</td>
<td>78</td>
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<tr>
<td>Apart</td>
<td>14</td>
<td>15</td>
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<tr>
<td>No opinion</td>
<td>8</td>
<td>7</td>
</tr>
</tbody>
</table>

In Australia, men and women of all ages gave much the same answers.

Common reasons were: “Share play as well as work” “Keep the family together” and “Separate holidays are the thin end of the wedge.”

On the other hand, the minority said, “Break the monotony,” “Fresh lines of thought,” and “Absence makes the heart grow fonder.”

Mum & Dad should holiday together

Canadians and Australians agree that husbands and wives should holiday together, a two-nation Gallup Poll discloses.
Japs Not Wanted At Melb. Olympics

Gallup Poll Finds

Chiefly because of Japan’s treatment of war prisoners, most Australians oppose Japanese athletes taking part in the Olympic Games in Melbourne.

“We cannot forget Japanese brutality,” the comment of a Melbourne postman’s wife, sums up the feelings of many who oppose the athletes coming here.

To sound public opinion on this controversial subject, Gallup Poll interviewers asked an Australia-wide “sample” of 2000 men and women:

Do you favor, or oppose, Japanese taking part in the Olympic Games in Melbourne.

56 per cent. oppose Japanese taking part in Melbourne Olympic Games;
33 per cent. are in favor; and
11 per cent. are non-committal.

Women are particularly hostile, their “against” vote being 60 per cent., compared with 53 per cent. from men.

Opposition comes from all six States, ranging from 51 per cent. in Queensland and Tasmania to 61 per cent. in South Australia. Victoria, the home State of the Games, is 57 per cent. “against.”

People’s Reasons

Japan’s treatment of war prisoners is the principal reason why people object to Japanese athletes coming to Australia. Another large group, however, say that Japan must not be allowed to rise again. As a Sydney electrician put it, “If given a chance, the Japanese will again menace world peace.”

Opinion of the minority who favor Japanese taking part in the Games, is summed up in the comment of a Brisbane shop-assistant’s wife, “As sportsmen, we should forgive and forget.”

An earlier Gallup Poll found Australians to be evenly divided on the question of Japanese again playing in Davis Cup tennis. Figures were: For, 43 per cent.; against, 44 per cent.; and undecided, 13 per cent.

Issued by Aus. Public Opinion Polls, 352 Collins St., Melb.
Less demand for home equipment

All important household purchases, except perhaps radios and stoves, are likely to meet with less demand in the next 6 months, judging by a recent Gallup Poll.

For the fourth consecutive year, the Gallup Poll has asked people throughout Australia what they were fairly certain to buy brand new before the end of the year. Each year the people interviewed have been handed cards listing the eight major articles. This table shows how demand has shrunk in the past two years:

<table>
<thead>
<tr>
<th></th>
<th>1951</th>
<th>1952</th>
<th>1953</th>
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<tbody>
<tr>
<td>Refrig.</td>
<td>13</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Washers</td>
<td>11</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Carpets</td>
<td>11</td>
<td>10</td>
<td>7</td>
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<tr>
<td>Radios</td>
<td>6</td>
<td>5</td>
<td>5</td>
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<tr>
<td>Cars</td>
<td>7</td>
<td>5</td>
<td>4</td>
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<tr>
<td>S.R. Suites</td>
<td>5</td>
<td>5</td>
<td>4</td>
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<tr>
<td>Stoves</td>
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<td>4</td>
<td>4</td>
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<tr>
<td>Vacuums</td>
<td>8</td>
<td>5</td>
<td>3</td>
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</tbody>
</table>

This year the proportion who said they would buy none of the eight articles was 68 per cent., compared with 62 per cent. last year. Some said they were likely to buy more than one of the articles, so the percentages in the table add to more than the 34 per cent. likely to buy at least one.

Marriage Loans Favored in Gallup Poll

An Australian Gallup Poll has found that 77 per cent. of people think “it's a good idea” for a Government to lend money to young couples, getting married, to buy furniture.

The survey was made following advice that the Belgian Government would lend £A170 to young couples for that purpose.

Locally, “give them a start,” and “an incentive to early marriage” were common comments when people voted.

Eighteen per cent. opposed the idea and five per cent. were undecided.

Comparison with findings of the Australian Gallup Poll in 1944 and 1945 shows a rise of 14 per cent. in the majority in favor of marriage loans.

PAY EQUALITY FOR WOMEN FAVORED BY 60 PER CENT.

Result of Australia's First Gallup Poll

Should women receive the same pay as men for doing similar work? As a result of women's increasingly active part in our wartime economy keen interest is again being taken in the question.

It was put to a representative cross-section of the community recently in the first Gallup Poll to be held in Australia.

Nearly 60 per cent. of those interviewed declared that they favored equal pay for women.

This poll was conducted by Australian Public Opinion Polls (the Gallup Method), and the analysis of the answers throws interesting light upon the views held by people of all occupations and grades of income.

Worded as the first question was, "Do you favor equal pay for men and women doing the same work?" The responses were unqualified.

This table shows that nearly 60 per cent. of the cross-section interviewed were in favor of equal pay. Only 30 per cent. were against the idea, and 8 per cent. were undecided. From the unqualified people, equality of pay was supported by 44 out of 100 women interviewed.

Australia-wide opinion

Equal pay... 50 per cent.
Against equal pay... 30 per cent.
Undecided... 8 per cent.
100 per cent.

Attitudes of People in Different Localities

City and town... 50 per cent.
Country... 30 per cent.
Undecided... 20 per cent.

At First, many who had opposed equal pay, who had formed opinions on the subject were found in favor of equality. Two out of three supporters of the Labor Party voted "yes" on the question.

Two out of three supporters of the Liberal Party voted "yes" on the question.

Opposition was strongest by better paid men, among whom relatively few women work. A common reason given for a "no" answer was that "women's place is in the home." Some thought that women were temperamentally and physically not so fitted for wage-earning jobs.

These in favor of equality usually based their decisions on the arguments of equal rights and the need for protecting wage standards. The second argument is reflected in the fact that working people are strongest supporters of equality of pay.

How People in Different Circumstances Look at the Question

Equal paid... 50 per cent.
Equal paid in... 30 per cent.
Equal paid... 20 per cent.

Other Findings Later

Other questions included in the same survey dealt with compulsory saving, official representation in Russia, how people felt about the last government's handling of our war effort, Australian representation at meetings of the British War Cabinet, an all-party wartime Government, professional sport during wartime, experience with price control, and preference for taxation or inflation.

Findings of the poll on these figures will be published as they become available.

It cannot be guaranteed that the poll gives exactly the same result as a full and expensive referendum. But the Gallup method in America and England has been proved to be a good indication of public opinion in only a small percentage.

The Gallup method, a brief consists of obtaining opinions by personal interviews of a typical cross-section of people in various walks of life, in different economic circumstances, and in different communities, as far as possible in the same proportions as they exist in the population as a whole.

Interviewers are warned against giving indications or action that might bias people's replies. They are instructed to repeat the question if need be, in the exact words, but under the circumstances to amplify or explain it.

Free and open public opinion polls have been extensively studied in various research foundations, and extensive literature on the subject exists. All this knowledge and experience has been carefully applied to the Australian organization, in the creation of which The Herald took the initiative, cooperating later with newspapers in the other States. It is proposed to conduct a series of Australia-wide polls.
Reduce ‘HCL’ Is
First Govt. Job
Public Says

The first objective of the Menzies Government should be to reduce the high cost of living, in the opinion of most electors interviewed by the Gallup Poll.

In this survey, conducted a few days before the election, people were handed a card listing five of Australia's problems, and asked:

After the election, which of these problems do you think Federal Parliament should attend to first, no matter which party wins?

Of every 100 people interviewed:
49 selected “Keep down the cost of living”;
26 said “Increase production”;
17 said “Reduce industrial unrest”;
5 said “Improve wages and conditions” and
3 said “Improve social services.”

Women are particularly worried about the cost of living, and 57 per cent. selected it as the first problem to be tackled.

Comparison with a similar survey in 1947 (before prices began to soar) shows how opinion has swung from the belief that “increased production will keep down the cost of living” to the belief that the problem is basically monetary, caused by such factors as sterling devaluation.

AUSTRALIA'S BIGGEST PROBLEM

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<tr>
<th>1947</th>
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<td>Living costs</td>
<td>25</td>
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<tr>
<td>Production</td>
<td>44</td>
</tr>
<tr>
<td>Unrest</td>
<td>21</td>
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<tr>
<td>Wages</td>
<td>6</td>
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<tr>
<td>Social services</td>
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</table>

People interviewed in December were asked for second preferences and amalgamation of first and second preferences shows that two people selected “Cost of living” to each one for “Increased production.”

Loans For People Being Married

Australians are overwhelmingly in favor of marriage loans, like those recently introduced in Belgium.

Soon after the cabled announcement that the Belgian government was going to lend £170 to young couples getting married, to buy furniture, the Australian Gallup Poll began surveying public opinion here on that subject.

After telling people about the Belgian plan and, explaining that the loans are repayable over 10 years, free-of-interest, interviewers asked:

"Do you think it would be a good idea, or not, to have those loans here?"

"Give them a start" and "An incentive to early marriage" were common comments when people voted:

"It's a good idea"... 77 per cent.
Opposed to loans... 18 per cent.
Undecided... 5 per cent.

Comparison with findings of the Australian Gallup Poll in 1944 and 1945 show a rise of 14 per cent. in the majority in favor of marriage loans.

People in Queensland and New South Wales are strongest for the idea, but in no State does the favorable vote fall below 70 per cent.

Further analysis shows that people's incomes, ages and political parties don't have a significant effect on their opinions about marriage loans.

Issued by Aust. Public Opinion Polls, 555 Collins St., Melb.
Half People Have Holidays At Home

SAYS GALLUP POLL

Despite almost universal provision of a fortnight's paid holiday in Australian wages awards, only half the adult population has had a holiday of two weeks or more away from home in the last 12 months.

To learn the extent of the "annual holiday" exodus and when it occurs, the Gallup Poll recently asked a "sample" of people throughout Australia:

In the last 12 months, have you had a holiday of two weeks or more, away from home?

Answers show that 54 per cent or more than half of the people interviewed, have had a holiday of at least a fortnight away from home since March of last year.

Further questioning shows that more than half of the holidays are taken at Christmas or in the two Summer months, January and February:

- Christmas ... 14 per cent.
- Jan. and Feb. (Summer) ... 15 per cent.
- Other nine months ... 25 per cent.

Total "went away" ... 54 per cent.

Did not go away ... 46 per cent.

The 54 per cent who went away for a fortnight's holiday comprises 62 per cent of single people and 51 per cent of married people.

This difference between single and married people is reflected in the answers of the age groups. The "went away" figures for the three age groups 20-29, 30-59 and 60 and over are 53 per cent, 37 per cent and 37 per cent respectively.

Analysis by occupation shows that "white collar" employees head the list for "went away". Farmers and unskilled workers as groups, had the least holidays away from home last year.

HAD HOLIDAYS AWAY FROM HOME

- "White collar" employees ... 68 per cent.
- Executives and managers ... 56 per cent.
- Small shop-keepers ... 54 per cent.
- Skilled and semi-skilled ... 54 per cent.
- Farmers ... 43 per cent.
- Unskilled workers ... 42 per cent.

Last September the British Gallup Poll asked people: "Did you have a summer holiday away from home this year?"

Summer, of course, is holiday time in England, and the proportion which answered "yes" (57 per cent) compares closely with the 54 per cent of Australians who went away for a fortnight or more sometime during the year.

Issued by Aust. Public Opinion Polls, 352 Collins Street, Melb.
Train Least Popular For Long Journeys
Gallup Poll Finds

If a group of people were going on a thousand mile journey, for every one who would want to go by train, two would prefer to go by car, another two by ship and three by plane.

In this Australia-wide survey of people's preferences for different methods of travel, the Gallup Poll asked:

If you were going for a journey of a thousand miles, such as between Melbourne and Brisbane, and the time and cost didn't matter, how would you plan to travel—by train, ship, or plane?

- Plane: 34 per cent.
- Ship: 27 per cent.
- Car: 25 per cent.
- Train: 14 per cent.
- No preference: 5 per cent.

(People in Tasmania are the most air-minded (42 per cent.). Other Queenslanders next (40 per cent.), and Western Australians, however, show a strong reference (47 per cent.) for travel by ship.

People's sex does not make such a difference to their travel preferences. Age, however, has a marked effect; the older a man gets, the greater the desire to "keep one foot on the ground," rather than to get there quickly by plane.

Experience Teaches

To further questions: "Have you ever been to another State? How did you travel?" people answered—

- 41 per cent. travelled by train.
- 24 per cent. travelled by ship.
- 20 per cent. travelled by car.
- 19 per cent. travelled by plane.
- 28 per cent. have never travelled to another State.

The total is more than 100 per cent., because two or more people travelled by more than one method of transport.

Victoria and Tasmania have greatest proportions of people who have been interstate—8 out of 10, compared with about 7 out of 10 in NSW, Queensland and SA, and fewer than 5 out of 10 in isolated WA.

Cross-analysis of answers to the questions shows:

- Of those who have travelled interstate by train, only one out of every six would prefer to use that method now for a journey of 1000 miles.
- Of those who have travelled by ship, only one out of every six would have preferred to travel by ship if the cost was not a problem.
- Of those who have travelled by car, almost half would have preferred to travel by train if the time and cost were not a problem.
- Of those who have travelled by plane, 2 per cent. wanted to use that method now, while 5 per cent. preferred travel by train.

Endowment Not Birthrate Aid

Child endowment and maternity allowances are not resulting in larger families, in the opinion of most people interviewed in a recent Gallup Poll.

In all States, men and women in a full-range of occupations and economic circumstances were asked: Do you think child endowment and maternity allowances are resulting in larger families, or not? No, they're not resulting in larger families, say 51 per cent.

Yes, they are, say 24 per cent.

Don't know, say 15 per cent.

Opinions of men and women as groups are similar, and people's ages don't have much effect on their opinions.

Accordingly public opinion of this subject is fixed, because five years ago the same proportion of people (51 per cent.) answered "No" in a Gallup Poll on whether an increase in child endowment from 4/- to 10/- would result in larger families.

Opinion in Australia and England are in close agreement on this subject. Judging by a comparison between the latest Australian finding and earlier results in U.K., in July when the British Gallup Poll asked: "If you had a choice of spending Government money to encourage parents to have more children?"

Aust. U.K.

- Yes: 85 per cent.
- No: 15 per cent.
- Don't know: 17 per cent.

Issued by Aust. Public Opinion Polls, 332 Collins St., Melb.
1951

“Should women be able to wear shorts in the street when not at holiday resorts?”

Yes 49%
No 47%
1956

Australia’s favourite Saturday evening leisure pursuits:

- radio 26%
- movies 19%
- reading 17%
- visiting 14%
- cards 8%
- dancing 5%
People will face an increasingly complex social environment.
- More women entering the workforce
- Changing role of marriage
- Redefinition of the family
- Shifting image of beauty
- Global Communication
- Internationalisation
- Information demands
- Australia is middle aging
- The middle class is smaller
- Increased social disruption, alienation, conflict and violent crime
- Privatisation
- Technology
More than ever before we need to understand that consumer - the choices he or she will make.
The Single Source Link
Roy Morgan Single Source puts you in touch with the customer.
Armed with a complete picture of your target market, you are
in the best position to fine tune your brand strategies, focus your
communications and thereby optimise your marketing budget.
“Listening to the people”
“The buggers won’t listen to me. You can ring up the radio stations and the politicians won’t listen. (You can) write to parliamentarians and they don’t reply. I feel left out, unlistened to, and ostracised”
“Listening to the people”
Consumers are harder to get, and much harder to move.
How do we know if we’ve hit the spot?
“If you want to know how people feel about something, ask them.”
Are you ready to learn what your customers and prospects really think?
The Worm provides the unvarnished opinions of respondents
EXAMINE EVERY NUANCE

Track your target audience’s emotional responses by the second.
The Worm often features on television in Australia and overseas, particularly during election debates, providing voters’ responses in real time to candidates’ election speeches, word-by-word.
Respondents are recruited from Roy Morgan Single Source,
Generally, between 50 and 100 respondents are seated in The Worm Theatrette.

Each respondent has their own Worming Dial that records their responses (three times per second) and is linked to their profile.
Each session begins with a briefing by the moderator and training via *The Worm Experience*, a ten minute video that provides our analysts with *The Worm Benchmark*. 
The respondents then provide continuous responses to your products, concepts and source materials.
KEY APPLICATIONS

- Concept testing television commercials & animatics, corporate & training videos.
- Testing press & magazine layouts and all print communication materials.
- Uncover the strengths and weaknesses of multimedia campaigns.
- Testing program content, presenters and promos for television & radio.
- Guaging readers’ responses to alternate magazine covers, features, stories and designs.
- Discover the ‘turn-offs’ and ‘hot buttons’ in speeches and presentations.
- Refine product concepts, designs and packaging with quantifiable feedback on every element.
- Test legal arguments, opening & closing statements with a ‘Worm jury’ before trial.
“No other research technique can give you an honest gut reaction like *The Worm.*”
Worm respondents don’t have to tick boxes or select from pre-determined answers on a questionnaire.

They aren’t influenced by ‘group leaders’ or others’ opinions.

And they don’t become over-analytical pseudo art directors.

Their second-by-second responses are instinctive, almost unconscious.
Accurate, insightful answers at your fingertips.

- How engaging and appealing is my concept to my target audience?
- Which elements of my concept capture and hold consumers’ interest?
- How do consumer’s reactions to my advertising differ from my competitors’?
- How can I analyse the appeal of alternate concepts by demographic segment & lifestyle group?
- What research technique will show me how respondents feel about my concepts and provide immediate results?
Your results are provided on CD ROM and presented in the easily navigable Worm Windows Software.

The program links your source material as video or still pictures with selectable Worm graphs.
Research used to stop things

“Don’t let the facts get in the way”
Herald Sun “Phone in poll”

“Should scientists be able to use spare embryos for medical research?”

No   70.2%
Yes  29.8%
The real facts

Most people in Australia approve of scientists using stem cells extracted from embryos to treat diseases like Alzheimers and cancer and spinal injuries.

72% Australians
66% New Zealanders
63% USA
62% UK
“Should Microsoft be broken up?”

Yes 33%
No 45%
Undecided 22%
“Whether consumers disadvantaged by Microsoft’s monopoly?”

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
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<tr>
<td>Yes</td>
<td>33%</td>
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<tr>
<td>No</td>
<td>50%</td>
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<tr>
<td>Undecided</td>
<td>17%</td>
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Are you ready to learn what your customers and prospects really think?
THE WORM
IS READY AND REARING
TO GO TO WORK FOR YOU.
How can The Worm point you in the right direction?

Maximising the Link between your marketing activity and Consumer Behaviour

Marketing 2002 - Ideas & Innovations
AMI National Conference 2002
Presented by
Michele Levine, Chief Executive & Marcus Tarrant Chief Wormologist
Roy Morgan Research
THE WORM EXPERIENCE

• Consistent respondent briefing & moderating.
• ‘Training’ for rapid responses.
• Testing all mediums and stimuli.
• Capturing feelings. (The Force.)
• The Worm Control Video experience.
• Precise benchmarking.