MEDIA RELATED UNIVERSE ESTIMATES

Nielsen Client Webinar

July 21, 2011

COMMITTEE MEMBERS

- Nancy Gallagher - NBC Universal, Chair
- Michele Buslik - Targetcast-TCM
- David Gunzerath - MRC
- Greg Iocco - Scripps
- George Ivie - MRC
- Dan Murphy - Univision
- Matt Ross - Hearst
- Ceril Shagrin - Univision
- Christine Pierce - Nielsen
- Richard Zackon - Facilitator
- Research Triangle Incorporated (Research Partner)
- Randall Keesling
- Melissa Helton

THE MISSION

- Conduct independent Household Media-Related Equipment Survey in Dallas-Ft. Worth DMA

- Determine reliable method(s) for creating accurate media-related universe estimates including subsets such as:

  - Age
  - Sex
  - Income
  - Geography
  - ethnicity
  - Language

  that can be readily adapted, updated, and expanded to reflect rapidly changing technologies

THE EXPECTATION

This study is intended to be a first step:

- Access the accuracy of Nielsen sample-generated media-related UEs

- Identify areas where there may be issues

- Determine if it is possible to obtain correct results without in-home observation

- Identify areas/procedures for further study

THE MARKET

The Dallas-Fort Worth DMA was selected because:

- It is an LPM market (local people meters)

- It has significant levels of ethnic population 14% black, 20% Hispanic

- It has a mix of rural/urban counties 8% of market is D county

- Its high proportion of over-the-air households (18.4% in February 2009) would give some insight into impact of digital convergence

THE TIMELINE

April 2008	RFP Issued
September 2008	RTI Selected
January 2009	Kick-off Meeting
March 2009	Questionnaire Approved for Testing
April 2009	Sample Design Approved
May 2009	Cognitive Interviews Complete
June 2009	Questionnaire Finalized
May-August 2009	Field Recruitment, Training, IRB, Printing
August-Nov 2009	Field Data Collection, Data Entry, Validation
August 2009	E&Y Review
Nov-Dec 2009	Weighting, Report Preparation
January 2010	Final Data Delivered to CRE
Feb-March 2010	Data Analysis
March 2010	Follow Up Phone Interviews to Determine Cell Only
April 2010	In-Person Meeting and Plan for Next Steps
May 2010	Follow up for Non TV HHs
November 2010	Report to CRE
3rd QUARTER 2011	Webinar for Nielsen Clients

iPad introduced Jan 27,2010

THE SAMPLE

DESIGN

First Stage: Census Block Groups (CBGs)

- Sampling Frame: All CBGs with locatable mailing addresses
- Stratification   Explicit: Inside/outside MSA, Hispanic and African American concentration

  Implicit: County, tract, block group
- Type of Selection: Probabilities proportional to size
- Sample Size: 60 CBGs

Second Stage: Locatable Mailing Addresses (LMAs)

- Sampling Frame: All locatable residential mailing addresses in selected CBGs
- Stratification   Implicitly sorted by carrier route and delivery sequence number
- Type of Selection: Systematic sampling within each CBG
- Sample Size:1,000 locatable mailing addresses (average 16.7 per CBG)

THE SAMPLE

ASSUMPTIONS

Category		Number
Initial sample size of address		1000
Locatable housing units	Housing units that physically exist in the selected Census block groups.	950
Accessible housing units	Housing units that can be reached or accessed by the interviewer	880
Occupied housing units	Accessible housing units that are occupied, or can be determined to be occupied	800
Contacted housing units	Accessible, occupied housing units where a member of the household has been contacted	775
Eligible housing units	Contacted housing units with 1 or more occupants age 18 or older, who can speak English or Spanish	750
Cooperating housing units	Housing units that complete the interview	600

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WEIGHTING

1. Design weights accounted for unequal probabilities of selection at each stage of sample selection
   - Higher Density Black and Hispanic Areas were oversampled

2. Design weights were adjusted for non-responding units

3. Nonresponse-adjusted weights were post-stratified to estimates of the target population to ensure proper coverage
   - Nielsen weighting controls used as starting point

THE SURVEY DESIGN

- Utilized Personal Interview Approach
  - Interviewees to serve as proxies for other householders
- Address-based sample of 1,000 households
  - Target was 600 completed interviews
- Multiple Iterations of Questionnaire Draft Were Completed
  - Underwent repeated review and revision process
- Also Addressed Question of How to Most Effectively Use Showcards as Interview Aids

THE QUESTIONAIRE

- Questionnaire Design Stage Took Place from January-July 2009
- First Step: Consulting with Various Expert Sources for Insights, Guidance and Definitions
  - Nielsen Media Related Equipment Questionnaire
  - Other Market Research and Industry Surveys
    - Consumer Electronics Association, other Marketing and Media Research Companies

THE QUESTIONAIRE

- Consisted of Maximum of 47 Questions (considering potential skip patterns), Including Introductory and Demographic Questions

- Plus a Limited Number of Showcards Were Developed for Interviewers' Uses
  - Showcards were used ONLY for demographic info such as income

THE QUESTIONAIRE

- Television
  - Presence of working sets, number of sets
  - Content sources
    - Cable, Satellite, Telco, Over the Air, Other (or combinations)
    - TV Set Characteristics
      - DTV, HD capabilities, Screen Size
    - Accessories
      - DVD, DVR (including STBs and TiVo), VCR, etc.

THE QUESTIONAIRE

- Other Video
  - VOD
  - Online
  - Slingbox
  - Portable DVD Players
  - iPods and Other Portable Video Devices

THE QUESTIONAIRE

- Radio
  - Satellite, Terrestrial, Internet Streams

- Other Music/Audio Sources
  - iPods and MP3 Players
  - CD Players

- Games
  - Gaming Systems
    - Wii, XBox, PlayStation, other console and handheld systems

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THE QUESTIONAIRE

- Telephone
  - Landline
  - Cell Phone
    - Including Internet Access, Subscription Services

- Internet
  - Type of Service
  - Source of Service

- Personal vs. Household Based Media

THE QUESTIONAIRE

- Cognitive Interviews Pre-Testing
  - Performed Among Group of 20 Test Respondents
    - Recruited via CraigsList and RTI Internal Classifieds
    - These Respondents Included, by design, six Spanish Language Respondents
- Questionnaire Adjustments and Final Signoff
- Field Interviewer Manual and Other Materials for Interviewers
- FAQ Brochures Developed

THE FIELD INTERVIEWERS

- 10 experienced interviewers selected for training
- 3 day training
    - -2 interviewers eliminated
    - -one certified for Spanish language only
- Training attended by CRE and Ernst & Young
- Field staff audited by Ernst & Young

THE FIELD AUDIT RESULTS

- E&Y performed review in August 2009
  - Procedures performed included the following:
    - Read training materials and attend a training session
    - Compare English and Spanish questionnaire for reasonableness
    - Speak with all bilingual interviewers to confirm speaking abilities
    - Assess the interview supervision and validation process
    - Observe a small sample of interviews
- Positive review, no flags raised by E&Y

THE FIELDWORK

- Fieldwork Began in Early August 2009
- Fieldwork Completed Late October 2009
- Interviewer Debriefing Sessions Held After Completion of Fieldwork To Gain Additional Insights

ELIGIBLE CASES REPORT

	Cases
Completed Interviews	644
Language Barriers	3
Final Refusal	125
Security Rejection	20
Exhausted Attempts	128
Total	920

70% COMPLETION RATE

THE RESULTS

- Primary Characteristics very close to Nielsen UEs
  - Cable, Satellite, and Number of Sets
  - Differences not statistically significant for Total, Black, or Hispanic

- Statistically Significant Differences
  - HD characteristics higher (10+ points) in the CRE study
  - DVD lower in the CRE study
    - Particularly among Hispanic homes
    - Nielsen: 89.1% vs. RTI: 67.7%
- Directional (but not significant) differences
  - Number of sets per HH for ethnic groups

NUMBER OF TV SETS

	Nielsen		CRE/RTI		CRE - Nielsen	
	Estimate (%)	SE	Estimate (%)	SE	Differenc e	95% Sig.
1 TV Set	16.7	1.3	15.0	2.5	-1.7	No
2 TV Sets	29.4		29.3		-0.1	not tested
3 TV Sets	26.8		27.1		0.3	not tested
4+ TV Sets	27.0		28.6		1.6	not tested

NUMBER OF TV SETS

	Nielsen		CRE/RTI		CRE - Nielsen	
	Estimate (%)	SE	Estimate (%)	SE	Difference	95% Sig.
Black TV						
1 TV Sets	6.1	1.9	14.3	3.8	8.2	No
2 TV Sets	38.8		28.0	5.2	-10.8	Not tested
3 TV Sets	24.4		31.0	4.1	6.6	Not tested
4+ TV Sets	30.8		26.7	5.9	-4.1	Not tested
Hispanic TV						
1 TV Sets	13.6	2.9	22.8	6.3	9.1	No
2 TV Sets	26.9		28.5	4.9	1.6	Not tested
3 TV Sets	28.9		23.1	4.8	-5.8	Not tested
4+ TV Sets	30.5		25.6	4.8	-4.9	Not tested

CABLE/SATELLITE

	Nielsen		CRE/RTI		CRE - Nielsen	95% Sig.
	Estimate (%)	SE	Estimate (%)	SE	Difference	
Cable	46.2	1.8	45.0	4.4	-1.2	No
Digital Cable	34.4	1.7	34.1		-0.3	not tested
Satellite/ADS	36.7	1.7	36.7	4.6	0.0	No
Broadcast Only	17.5		18.9		1.4	not tested

HD, DVR, VCR, DVD

	Nielsen		CRE/RTI		CRE - Nielsen	
	Estimate (%)	SE	Estimate (%)	SE	Difference	95% Sig.
HD: Display Capable	52.2	2.0	62.8	3.8	10.6	Yes
HD: Receivable	37.3	2.0	50.9	4.1	13.6	Yes
DVR: Yes	43.1	2.0	47.5	4.0	4.4	No
VCR	58.7	1.6	64.2	3.1	5.5	No
DVD	89.1	1.1	81.2	3.1	-7.9	Yes

NON-TELEVISION HOUSEHOLDS

What may be our most important finding was a larger than expected percent of Non-TV households

- Television Penetrations
  - Cannot compute standard errors for Nielsen estimate, could not perform test of significance
    - » Nielsen: 99.2% vs. RTI: 97.6%

NON-TELEVISION HOUSEHOLDS

- Follow Up Questionnaire Developed for Non-TV Households
  - To Inquire About Reasons for Being a Non-TVHH (DTV Transition, Cost, Content Issues, etc.)
  - Follow Up Survey Conducted in May 2010

NON-TELEVISION HOUSEHOLDS

- Follow Up Interview of Non-TV Households
- Purpose is to learn more about reasons for not having TV and future plans

  - • Digital Transition
  - • Cord Cutting
  - • No interest

- **Result:** Only 3 respondents able to be re-contacted
-    Non-contacted HHs   3 (attempt rule met)
    No telephone # provided   4
    Telephone # disconnected   3
    Completed interviews   3:
       -2 watch TV via internet only (1 formerly subscribed to cable)
       -1 has acquired TV since interview

FOR USE IN FUTURE STUDIES

Our best practices

- Spend the time to get questionnaire right: We moved deadlines several times as quality was more important than timeliness
- Fix the costs in advance
- If possible use experienced interviewers
- Audit the field team

Learnings for future studies

- Try I-pad use by interviewers to automate skip patterns
- "Cable" is becoming a generic term—you need to probe if it is wired cable, satellite or telco
- Ask if land-line or cell phone only
- Re-think industry practice of terminating interview if non-TV HH
- Seize the opportunity to probe why and help determine "cord-cutting" impact

OUR NEXT STEPS

– CRE Sample Quality Committee has proposed a 3 market study that would include an update on media-related universe estimates encompassing an expanded list of products (tablets,etc) and more follow-up for non-tv households.