



AUDIENCE MEASUREMENT 5.0



Bud Breheney
Chief Commercial Officer
Kantar Media Audiences



Harvey Morrow
Director, Research Services
Kantar Media Audiences

Measuring Minority Audiences Using Return Path Data

Background

- Minorities currently comprise a little over a third of the U.S. population and are expected to exceed half of the population by 2050
- The proliferation of digital TV channels allows ethnic groups to have their own networks
- “Minority audiences” are behaviorally defined as viewers of specific foreign-language channels
- Measuring minorities has long posed challenges for (recruited) sample-centric services
- Return Path Data (RPD) offers a superior approach to measuring long-tail networks

Measuring Minority Audiences in TV's Long Tail

- High costs of recruiting due to low incidences
- Need for expensive enumeration studies to ensure proper representation by assimilation levels (e.g., Spanish-dominant respondents)
- Multi-ethnic households complicates classification
- Low survey cooperation rates
- Expensive door-to-door interviewing to reach households who did not have telephones
- Nielsen's TV ratings services report just 10 of the 40+ Spanish-language channels available in the U.S. and none of the many other foreign-language channels

Advantages of Using RPD for Measuring Minority Audiences

- Households can be selected anonymously for inclusion, eliminating non-response bias
- Totally passive, observation-based research eliminates respondent fatigue
- No need for enumeration surveys or bilingual interviewers/materials
- Much larger in-tab sample sizes allow for greater precision
- Ability to integrate Return Path Data with other data sources, allowing for deeper analyses

Considerations for Using RPD for Measuring Minority Audiences

- Limited availability of Return Path Data in the U.S.
- The need for set on/set off editing guidelines
- RPD provides household viewing data, not persons data
- The need for RPD standards across multiple data providers

Minority Audience Measurement: DIRECTView™ RPD

- Kantar Media Audiences' DIRECTView™ is a national RPD service projectable to about 17 million DIRECTV households
- We will examine the March 2010 Primetime viewing levels of 104 DIRECTV foreign-language channels
 - 42 Spanish channels
 - 14 Indian channels
 - 11 Chinese channels
 - 9 Filipino/Tagalog channels
 - 7 Russian channels
 - 6 Vietnamese channels
 - 4 Greek channels
 - 4 Korean channels
 - 4 Portuguese channels
 - 3 Polish channels
- Average in-tab: 259K set-top boxes, 107K households

Minority Audience Measurement: Charter Los Angeles RPD

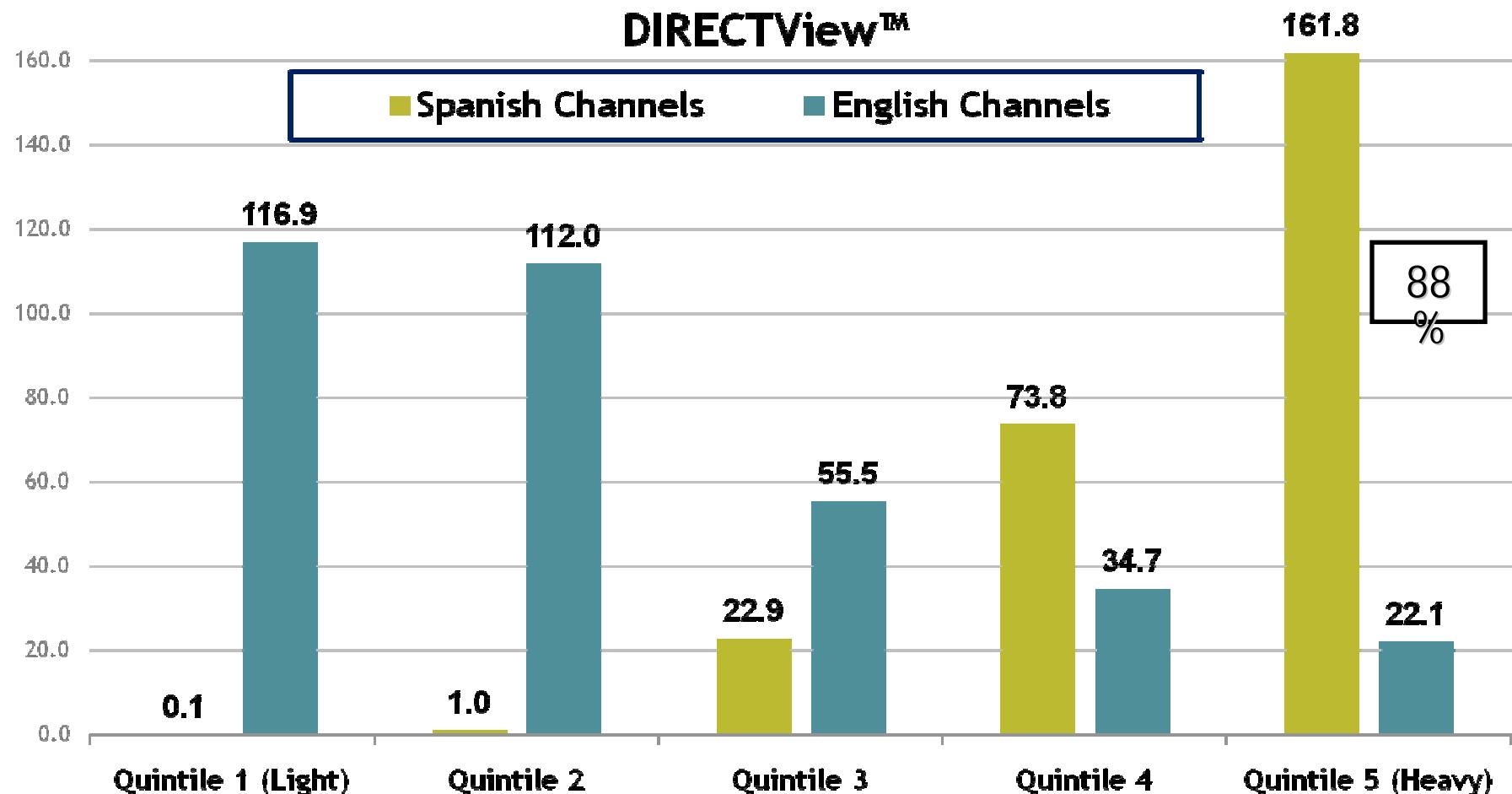
- Kantar Media Audiences' Charter Los Angeles is a local RPD service projectable to about 286K cable households
- We will also examine the March 2010 Primetime viewing levels of 50 Charter Los Angeles foreign-language channels:
 - 32 Spanish channels
 - 10 Chinese channels
 - 6 Armenian channels
 - 1 Korean channel
 - 1 Indian channel
- Average in-tab: 367K set-top boxes, 249K households

Share of Primetime HH Audience by Language of Channel

Channels	National (%)	Los Angeles (%)
Spanish	2.81	4.85
Armenian	--	2.89
Filipino (Tagalog)	0.26	--
Vietnamese	0.10	--
Chinese	0.10	2.75
Russian	0.06	--
Korean	0.04	0.03
Indian (Bangla/Hindi/Tamil/Telugu)	0.03	0.01
Greek	0.02	--
Polish	0.01	--
Portuguese	0.004	--
Foreign-language Channels	3.42	10.52
Total TV	100.00	100.00

Percentage of Live Primetime Total TV Audiences (000's), March 2010

Heavy Viewers of Spanish-Language Channels are Light English*-Language Viewers



*English-language Broadcast/Ad insertable Cable Networks - DIRECTView™ Set-Top Boxes Avg. Audience (000's) - Live, Primetime, March 2010
Quintiles are based on Whole Day viewing for March 2010

Heavy Foreign-Language Viewers are Light English-Language Viewers

DIRECTView™ Share of Foreign + English* Channels by Viewer Quintiles

Foreign-Language Share of Total	Q1 %	Q2 %	Q3 %	Q4 %	Q5 (Heavy) %
Korean	11.3	31.4	64.6	75.0	98.1
Chinese	0.1	0.2	13.5	74.7	95.2
Vietnamese	8.9	35.4	82.3	84.4	94.3
Greek	11.4	0.5	41.5	80.8	93.6
Spanish	0.1	0.9	29.2	68.0	88.0
Russian	20.0	61.2	49.9	81.2	86.7
Indian	0.5	14.8	44.1	56.9	83.2
Filipino/Tagalog	80.2	13.1	41.5	51.0	75.0

*English-language Broadcast/Ad Insertable Cable Networks - DIRECTView™ Set-Top Boxes Avg. Audience (000's) - Live, Primetime, March 2010
Quintiles are based on Whole Day viewing for March 2010

Amount of Time Viewed per Week by Viewer Quintiles

DIRECTView™ Avg. # Primetime Hours Watched by Viewer Quintiles

Language	# Hrs.	Q1	Q2	Q3	Q4	Q5 (Heavy)
		# Hrs.				
Vietnamese		4:04	4:34	8:41	9:54	12:50
Greek		5:50	3:58	6:09	10:59	11:57
Russian		4:42	7:21	7:26	10:10	10:36
Spanish		0:37	1:13	4:35	6:42	9:50
Chinese		0:47	0:19	3:26	6:14	9:01
Filipino/Tagalog			4:09	4:27	5:29	7:00
	8:49					
Indian		1:00	3:29	3:55	4:54	7:53
Korean		2:23	3:33	4:26	4:28	6:02

DIRECTView™ Set-Top Boxes - Avg. number of hours watched per week among viewers 18+ Live Primetime, March 2010

Quintiles are based on Whole Day viewing for March 2010

Ratio of Amount of Time Foreign to English*-Language, by Quintile

DIRECTView™ Avg. # Primetime Hours Watched by Viewer Quintiles

Language	Ratio	Q1	Q2	Q3	Q4	Q5 (Heavy)
		Ratio	Ratio	Ratio	Ratio	
Korean		0.13	0.46	1.82	2.97	51.90
Chinese		0.00	0.00	0.15	2.95	19.66
Vietnamese		0.10	0.55	4.65	5.41	16.59
Greek		0.13	0.01	0.71	4.21	14.65
Spanish		0.00	0.01	0.41	2.13	7.28
Russian		0.25	1.57	0.99	4.32	6.54
Indian		0.01	0.17	0.79	1.33	4.95
Filipino/Tagalog		0.15	0.71	1.04	3.01	4.07

*English-language Broadcast/Ad insertable Cable Networks

DIRECTView™ Set-Top Boxes - Avg. number of hours watched per week - Live, Primetime, March 2010

Conclusions

- Return Path Data offers many key advantages over recruited television audience measurement panels
 - Much larger in-tab samples sizes to measure long-tail networks
 - No non-response bias
 - No respondent fatigue
- The heaviest viewers of foreign-language channels are generally not engaged with English-language channels
 - Becomes a bigger issue as the U.S. population becomes a minority-driven majority
- As minorities become the majority and ethnic channels proliferate, RPD will have to be used as the primary measurement system