TAM Out of the Box

ASI Singapore May 2016
Christopher O'Hearn

Cultural and Social Challenges
of TAM Measurement

Lessons from the Arab world as we move towards digital...

Household panels v Individual compliance

Adopting new standards for new markets

Panels harder to manage, universe harder to guage

The need to innovate not replicate – vendors, JICs, clients

WE KNOW

The basics...

The United Arab Emirates

- Wealthy: 7th in adjusted GDP per capita

- Diverse: local minority, many expats – Arab, India, Philippines

- Small (about 8m): Gulf 45m / MidEast 250m / MENA 400m

- Mainly FTA Satellite TV: 750 channels – very fragmented

- Total spend US$800-1bn (?) about a third of potential size

- TV behind print, outdoor, even radio

The TAM Plan

Launch an 800 household panel called tview

Covering all the UAE regions... and nationalities

Tendered in 2011 and contract was awarded to Kantar.

People Meter 5000 box with audio matching

All individuals 4+

Daily overnight program and spot data for around 60 main channels

...and that's when things got tricky !

Three big problems...

The Universe
- No census
- No database
- No contact

1st audit after 1 year - 2013

Recruitment and Management
- Reluctance, resistance

Group	Compliance
Emiratis	42%
Arab Expats	55%
Asians	70%
Western/Others	65%

Problem 1: Establishment Survey

Initial survey used face-to-face block-based street sampling method.

Auditors felt it might exclude people who didn't walk outside of carpark or office block.

A large scale CATI survey was undertaken

• Reach 11,000 completed interviews

• Random, computer-generated dialling

• Mobile phone only

• Weighted for HH size and SIM cards

67 days of fieldwork... up to 41 interviewers

827,000 numbers dialled... 167,000 answered... final number completed 10,300

Success rate for completion 6.8%

Average productivity 1.1/hr for English/Asian interviews v 0.9/hr for Arabic

Average duration 17-18 minutes

- **Only 2100 incomplete contacts**

Error rate of 3 or fewer for acceptance... 16% cancelled

- **Main errors were about HH equipment (48%)**

Did it work?

By comparison to Face to Face sampling…

Nationality was similar

Number of TV sets at 0 or 1 was different

- 2011 2% = No TV and 74% = 1 TV

- 2015 19% = No TV and 55%

Face to Face over-estimated HH size

Some strange results e.g. many more Asians answered – harder to ensure we removed non-eligible respondents

The language of a technical committee is not the language of the panel

Taking into account all the people residing in your housing and with whom you share food regularly, how many rooms do you use, including the kitchen but excluding bathrooms.

Data perspective **NO** Confidence Perspective **YES**

Privacy

Panel Behaviours

Persuasion

Household Definition

Problem 2: Panel Management

TV SET Coverage				
TOTAL	Emiratis	Arab Expats	Asians	West/Others
74%	53%	75%	85%	94%

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The UAE home…

Avg HH Size 5.6
33% = 7+

3.3 TV Sets
1.9 SIM Cards pp

Her Majlis

PRIVATE
DO NOT
ENTER

... and this

Avg HH Size 2.7
34% = 1

24% No TV
1.5 SIM Cards pp

HOME SWEET HOME

Household Definition Matrix

Family household

Bachelor household

- Respondent
  - Living with others
    - +Family OR relatives
      - Sharing food
      - NOT sharing food
        - Sharing TV
        - NOT sharing TV
    - + Other bachelor/s AND/ OR other families
      - Sharing food
      - NOT sharing food
        - Sharing TV
        - NOT sharing TV
    - +Other bachelor/s AND/ OR other families
      - Sharing food
      - NOT sharing food
        - Sharing TV
        - NOT sharing TV
  - Living alone
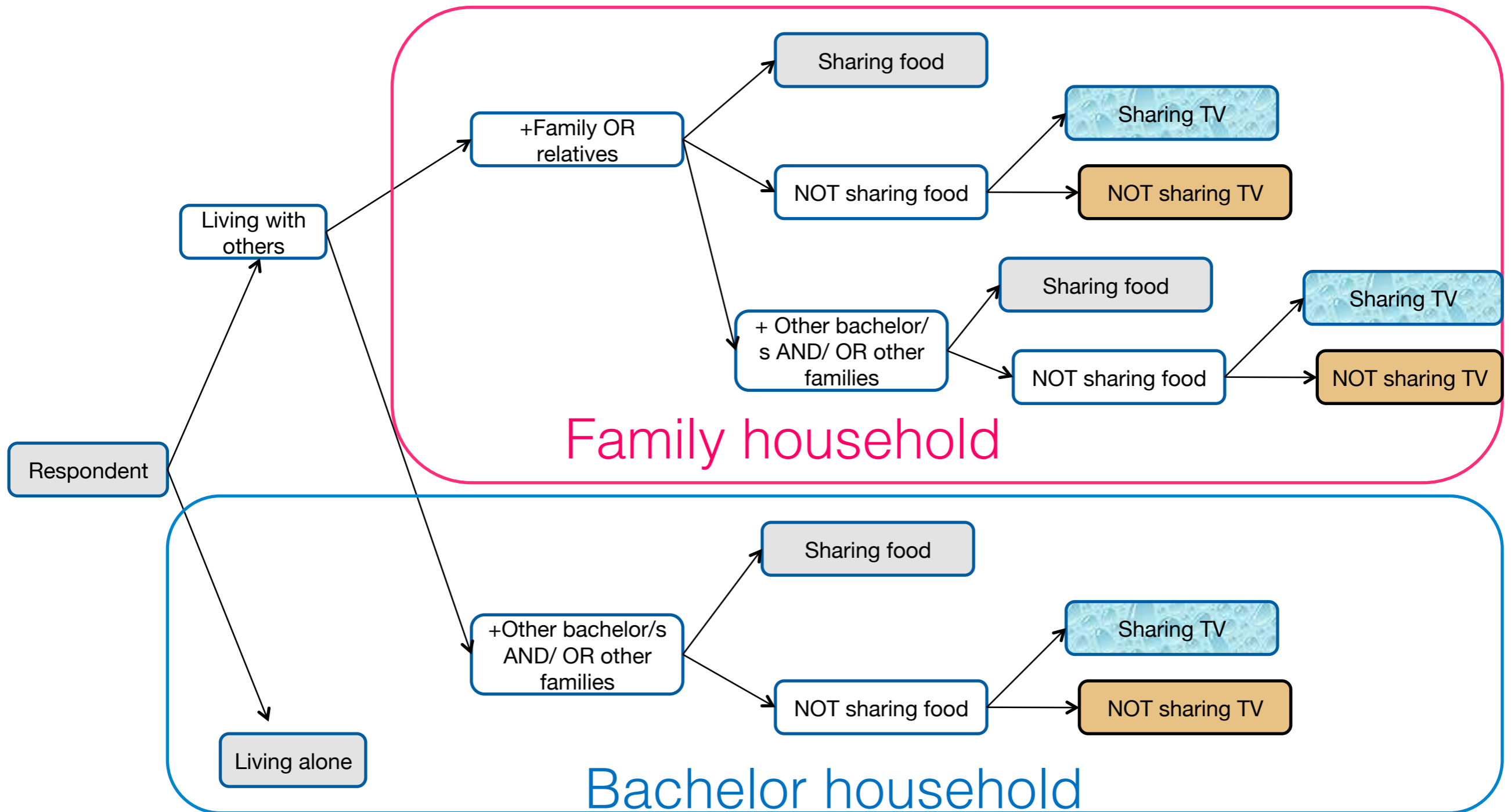
*Servants will be recorded as guests in all cases

In case there is no TV set in the HH, the sharing food criterion ONLY will be used to define the size of the HH.

THESE PERSONS ARE CONSIDERED TO BELONG TO THE SAME HOUSEHOLD

THESE PERSONS WILL BE RECORDED AS GUESTS

THESE PERSONS WILL BE NOT BE RECORDED (DIFFERENT HOUSEHOLDS)

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Problem 3

Group	2013 Compliance
Emiratis	42%
Arab Expats	55%
Asians	70%
Western/Others	65%

Actions

Deployment of 'beep' meters
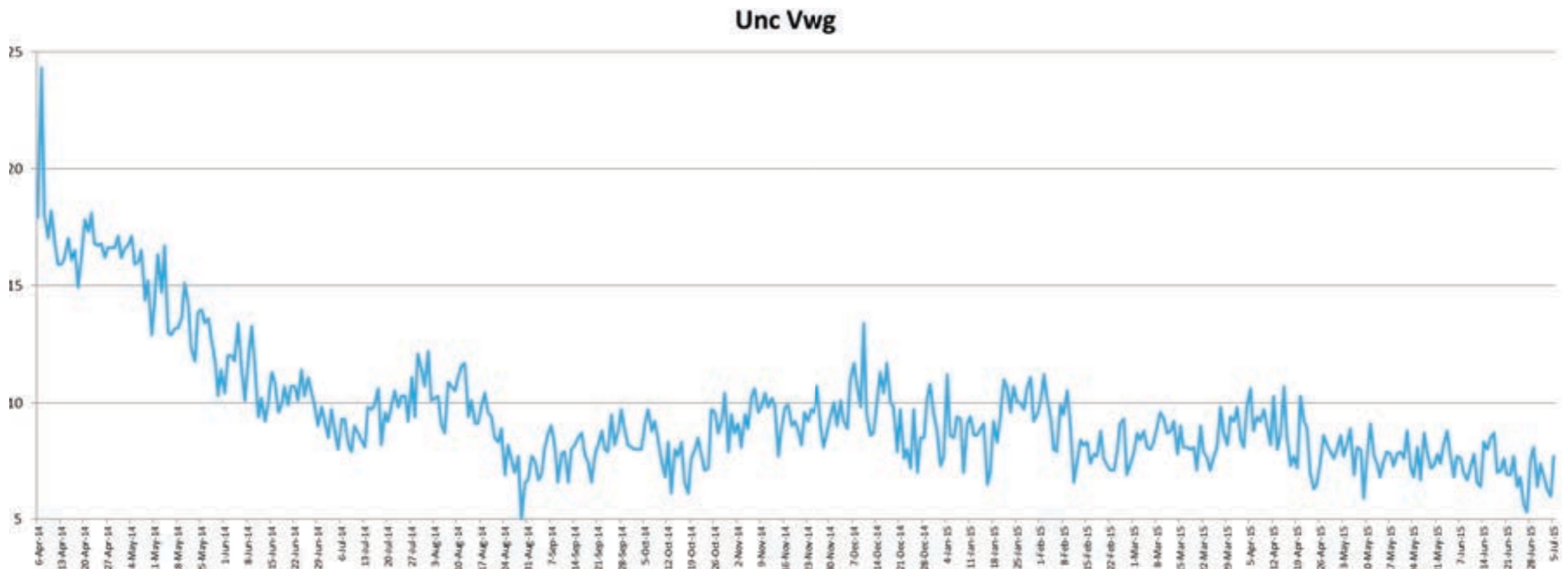
Panel training and education

Special incentives

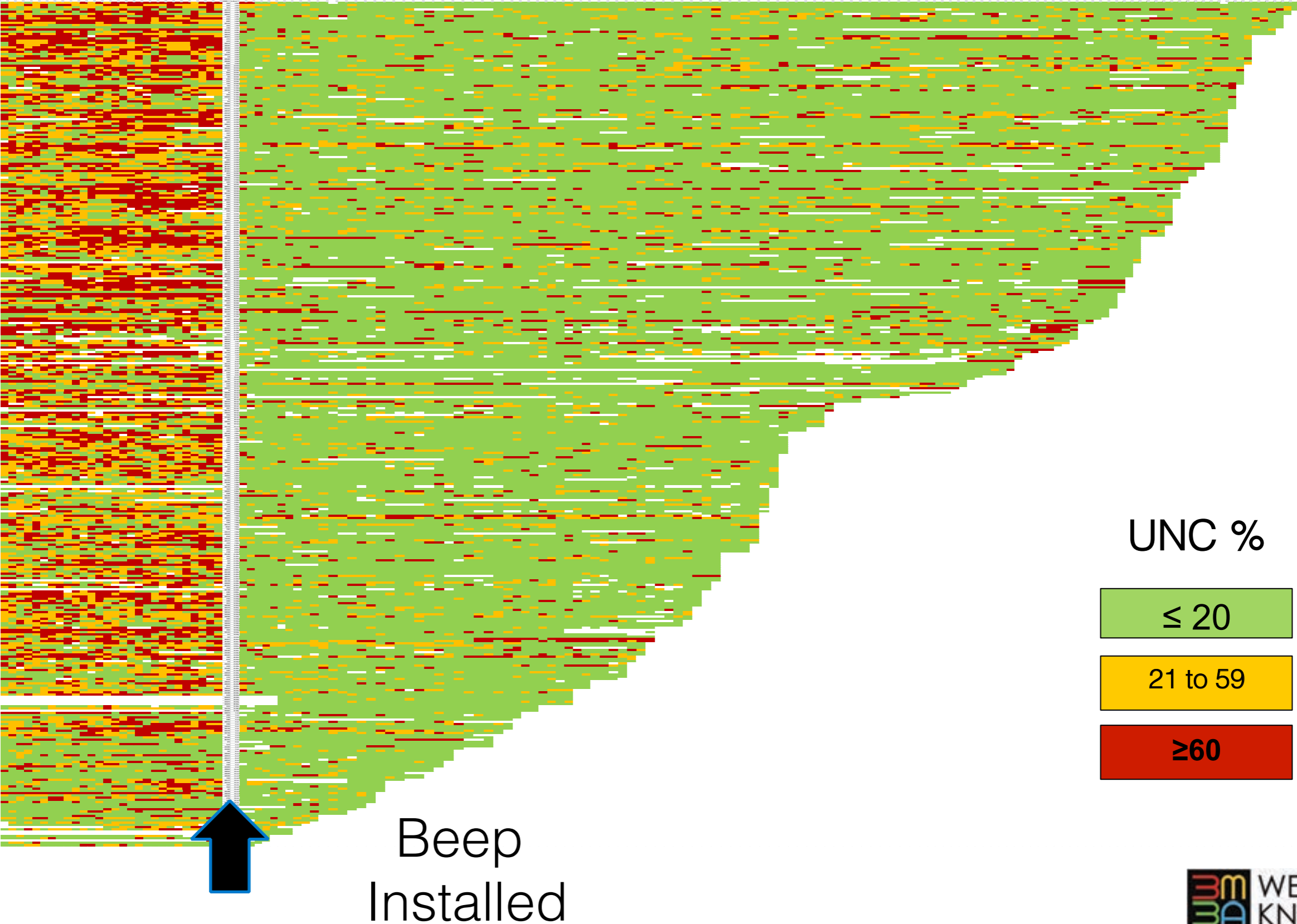**Removal of non-compliant panellists**

Improvements to Coincidental Survey

Beep Meters

Households with beep meters = 36% fewer sessions with no declaration.

Unc Vwg

Reduction of HH uncovered sessions to steady <10%...

Simple, effective, lasting

UNC %

≤ 20	(green)
21 to 59	(yellow)
≥60	(red)

Beep
Installed

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Improved but not enough…

Group	2013 Compliance
Emiratis	42%
Arab Expats	55%
Asians	70%
Western/Others	65%

Group	2014 Compliance
Emiratis	67%
Arab Expats	62%
Asians	85%
Western/Others	91%

Individual compliance remained a problem…

- Daily reach consistently tracking between 50-60%
- A CATI benchmark survey established an expected reach around 70-75%
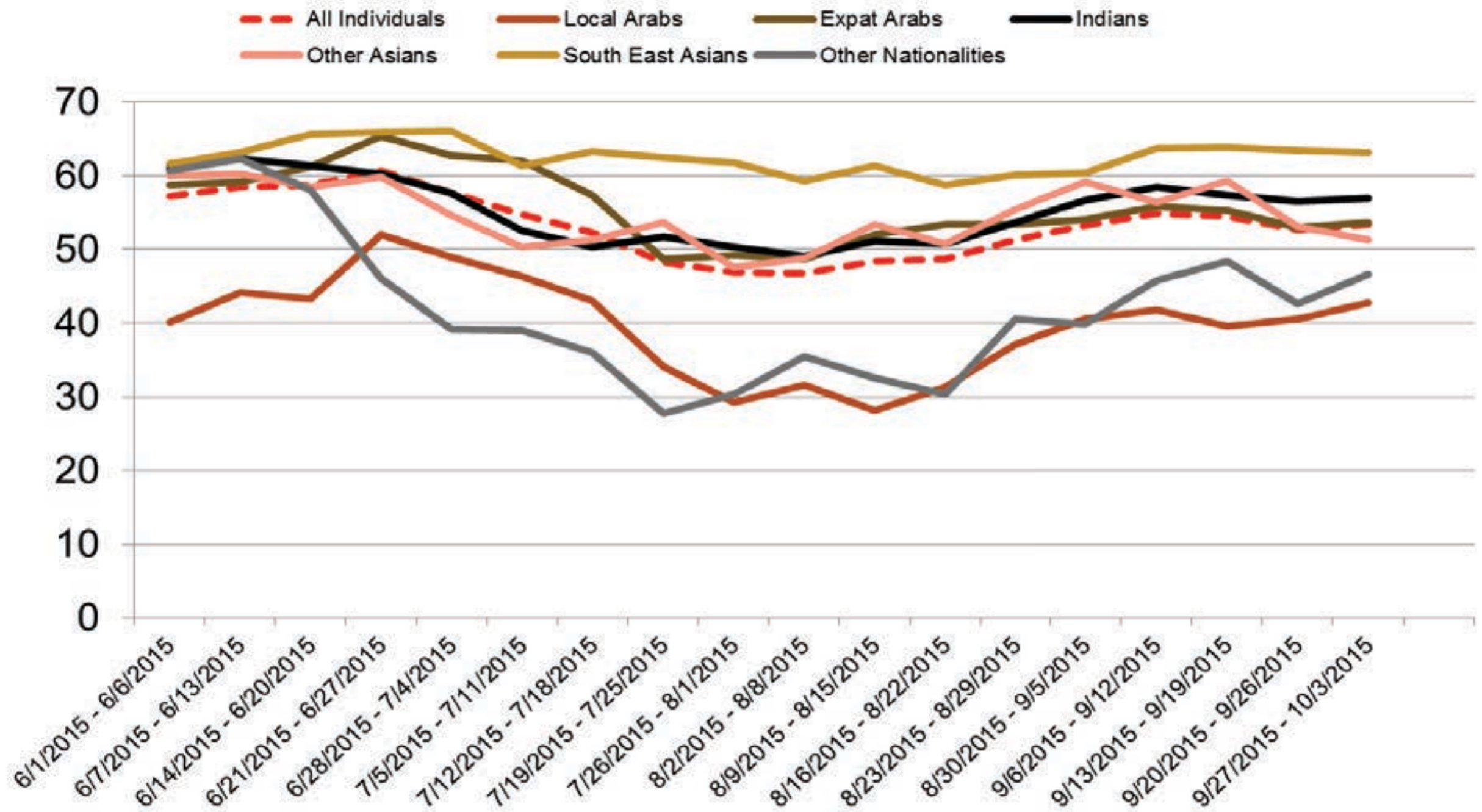
Panel feedback

"If the meter works automatically when turning on the TV without using the remote will be good if they make it in this way."

"Want to watch TV without pressing any buttons"

"If the meter gets on without the sound will be very good, like the receiver system, as when you on the TV ,the receiver gets on automatically without any sound and pressing any button."

"Sometime with all my responsibilities I forget that there is one more device that I have to turn it on. You are coming to relax and you really forget about it because you are not used to it."

What we think of panellists...

What panellists think of us...

% of Individuals present: Impact of dropping homes with higher number of 'Nil Viewers'

Total Panel

	May 2015
% Logged In(average)	56%
Individuals Logging in average	1518
Total Individuals on Panel	2702

Total Panel minus 24 HHs with non compliant Individuals

	May 2015
% Logged In(average)	59.2%
Individuals Logging in average	1486
Total Individuals on Panel	2510

Dropping 24 of the worst HHs suggested an increase of 3% in individual reach

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The light at the end of the panel

TV Set Coverage	TOTAL	Emiratis	Arab Expats	Asians	West/Others
2013	74%	53%	75%	85%	94%
2014	84%	68%	79%	92%	90%
2015	98%	91%	98%	98%	100%

Compliance	Emiratis	Arab Expats	Asians	West/Others
2013	42%	55%	70%	65%
2014	67%	62%	85%	91%
2015	83%	85%	90%	85%

Training

HH QC

Public Campaign

Beep Meters

HH Knowledge

Incentives

Simplify

The importance of understanding and managing panels cannot be overstated

Thinking out of the box... thinking ahead

If individual compliance in TAM is challenging, how much harder will it be when we try to cover multiple devices.

• Already becoming apparent in European panels

• Don't forget the technology

Individual countries have individual peculiarities and challenges

• Is Global conformity compatible with having the best system

• Vendors, advertisers, agencies have to accept variation

Good quality panels are at the core of good quality research

• How do we get young people, mobile people, connected people to take part in our panels?

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Thank you

Christopher O'Hearn

cohearn@3m3a.com

April 13, 2016
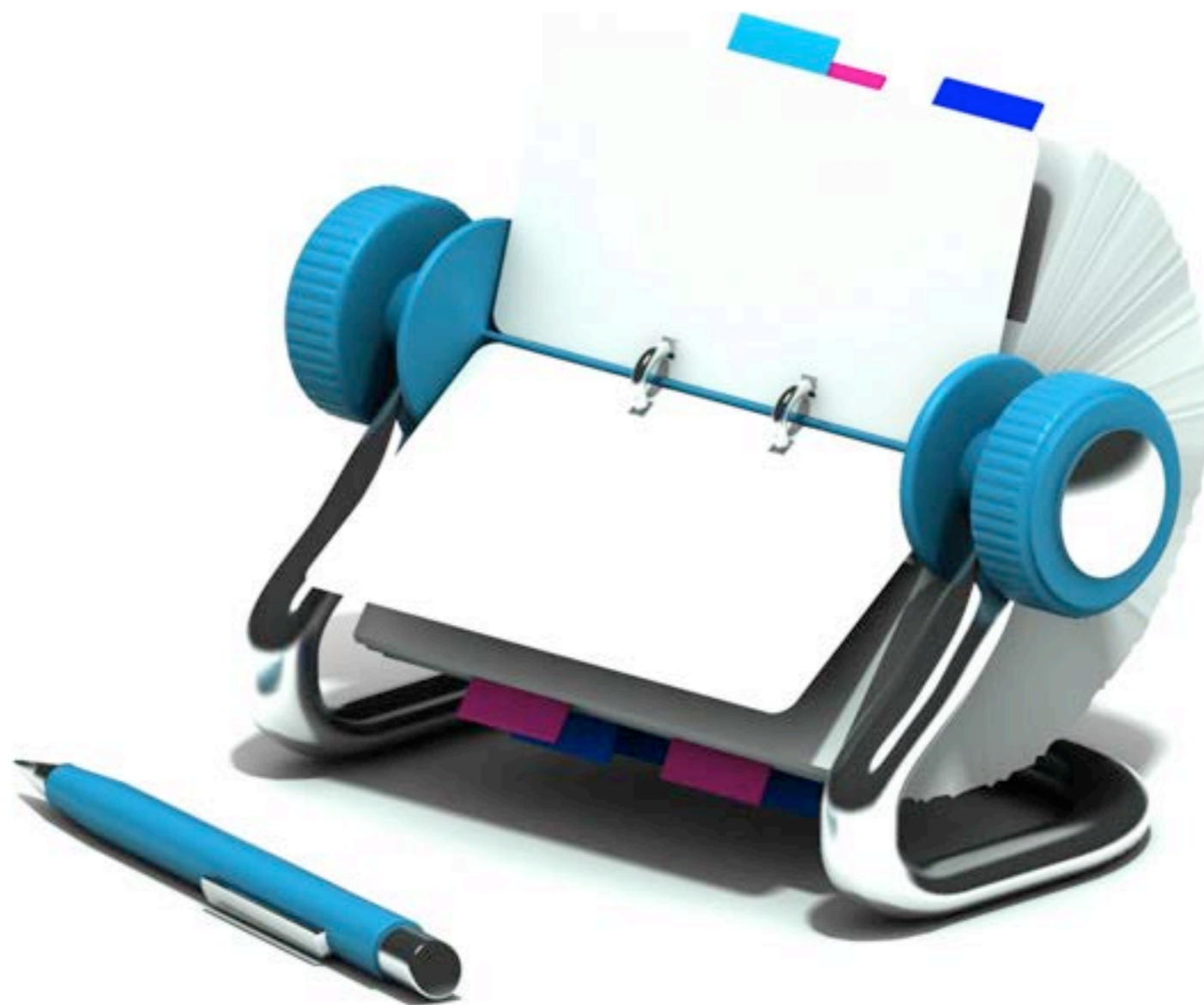
Appendices

The HH picture... big and little

HH size	Emirati	Expat Arabs	Asians	Westerners/ Others
Sample Base	1550	3700	4478	560
1	10	31	34	48
2	5	15	16	18
3	8	16	21	12
4	13	17	19	16
5	16	12	6	4
6	15	5	2	1
7+	33	4	2	2
Avg	5.6	3.0	2.7	2.2

SIM CARDS	4.3	2.8	2.5	2.1

WE KNOW

Whose household is it anyway?

Age-group	Emirati	Expat Arabs	Asians	Westerners/ Others
Sample Base	1550	3700	4478	560
Flat/ apartment	14	71	62	63
Villa/House	83	16	11	25
Flat shared with other bachelors/ families	1	11	21	9
Villa shared with other bachelors/ families	1	2	6	3

Age-group	Emirati	Expat Arabs	Asians	Westerners/ Others
Sample Base	1550	3700	4478	560
Flat/ apartment & Villa/House – **Not Sharing**	98	87	73	88
Flat shared with other bachelors/ families & Villa shared with other bachelors/ families - **Sharing**	2	13	27	12

What do they watch…

No of TV sets	Emirati	Expat Arabs	Asians	Westerners/ Others
Sample Base	1550	3700	4478	560
'1	17	59	64	51
'2	25	27	10	25
'3	21	7	2	9
'4	15	2	1	2
'5	9	1	0	1
'6	4	0	0	0
'7+	8	0	0	0
No TV set in household	**2**	**4**	**24**	**12**
Average	**3.29**	**1.53**	**1.22**	**1.61**

Comm'n Language	Total		Emirati		Expat Arabs		Asians		West/ Others
Arabic	**49.8**	Arabic	**98.9**	Arabic	**96.9**	English	**65.9**	English	**81.7**
English	**45.8**	English	12.6	English	23.4	Hindi	32.3	Arabic	18.5
Hindi	**14.7**	French	1.3	French	3.8	Malayalam	26.1	French	9.0
Malayalam	**11.8**	Urdu	0.8	Russian	0.4	Urdu	17.1	Ind. Afrilanguage	5.1
Urdu	**8.0**	Farsi	0.5	Urdu	0.3	Tagalog	15.4	Russian	4.5