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The UK TouchPoints Initiative

An assessment of its development and success in the British advertising market

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for

cimm
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Content:

Part 1. Introduction

The following assessment has been conducted in the context of the UK media scene. In terms of advertising investment print media is still the dominant force with newspapers taking 29% and magazine 11% of the total $23bn annual advertising expenditure, according to figures from ZenithOptimedia. Television's share is around 26%, followed by the Internet with 23%. Outdoor (7%), radio (4%), and cinema (1%) take the rest.

As in all developed markets, audience fragmentation and an explosion of digital channels lead to new challenges for advertisers, agencies, and media owners. In order to reach their target markets advertisers have increasingly turned to multi-media solutions, spreading their budget over a wider portfolio of channels in order to connect with existing and potential customers. According to the IPA campaigns that make it onto the shortlist for their annual Effectiveness Awards are now routinely using six or more different communication channels. It was against this background that the *need for an additional, non-silo based audience measurement* solution was identified by the IPA.

Much of the information for this report (especially for chapter 3) is based on discussions and interviews with users as well as non-users of TouchPoints during April and May of 2010 and the author would like to thank all 30 individuals as well as Lynne Robinson and Belinda Beeftink (IPA) who made time available to contributed to this project. Some of the respondents wished to remain anonymous and no individuals are identified. Contributions have come from the following organisations *(current non-subscribers are listed in italics)*:

Agencies	Carat i-Level MC&Co (Media Independent) MEC Mindshare MPG/Havas Media Naked Communications OMD UK
Media Owners	Associated Newspapers (newspapers, online) IPC Media (magazines, online – part of Time Warner) *ITV (largest commercial television company)* News International (newspapers, online – part of News Corp) *Sky TV (largest cable/satellite operator – managed by News Corp)* *The Guardian Media Group (newspapers, online, radio)* ThinkBox TV (marketing arm of all major commercial TV operators)
Advertisers	Central Office of Information COI (government advertising) *Unilever*
Joint Industry Committees	NRS UKOM RAJAR
Other Organisations	IPA, Telmar (Software bureaux), RSMB (contractor for data fusion)

Put together, the views and opinions gathered do not necessarily represent the position of the industry as a whole. The discussions and interviews were meant to help identify some of the key issues that dictate usage of, and attitudes toward TouchPoints by media and research professionals in the UK.

1.1. The development of TouchPoints

The IPA's Media Futures Group started to look at these issues in 2003. Consultation with senior planning directors of member agencies identified that their "key demand was for the IPA to provide a tool to evaluate mix media schedules both for planning and post campaign purposes" (Robinson, Beck, Wilcox 2006). Accordingly, the project was given three clear remits:

- to deliver new insights in how individuals consume media,
- to bring together the industry currencies (and other data sources) in a single database,
- to act *complementary* to existing currencies and not aim to replace them

The agreed solution was to develop a consumer-centric multimedia survey that could deliver new insights as a stand-alone study and at the same time act as a central *Hub* through which the various currencies (and other data bases) could be brought together via a process of data integration, that would preserve the original currencies and become the *Integrated Planning Database* (or Channel Planner as it is now called) for multi-media schedule evaluations. The first TouchPoints survey was launched in summer 2006, followed by TouchPoints 2 in 2008. TouchPoints 3 is due to be published in July 2010 (the Hub survey) and September 2010 (the Channel Planner).

1.2. TouchPoints – its purpose and role in the planning process

The IPA TouchPoints data was conceived so its two key elements, the Hub Survey and Channel Planner can be used across all stages of the development of brand communication strategies (see Table 1). In practice the currencies in their original format will continue to be a key tool to be used by the various channel specialists (print, broadcast, digital etc) for any fine tuning of the print, TV or online schedules. What it new (and unique) with TouchPoints is that results can now be fed into the Channel Planner to get a more holistic estimate by producing net unduplicated reach, frequency and GRPs for all channels combined.

A full list of the channels covered by TouchPoints and the available planning inputs can be found in Appendix 3.

Table 1: TouchPoints throughout the planning stages

Stage 1	Setting the objective	HUB to probe the objective of a campaign, e.g. to demonstrate corp. responsibility, attitudes to environmental issues, etc
Stage 2	Budget setting	• HUB to establish relative weight of advertising required • CHANNEL PLANNER to construct an effective media plan to deliver the desired weight of advertising
Stage 3	Target audience definition	Using mainly the HUB data • Market knowledge (size, brands, usage) • Competitive information • Explore target definitions (demos, lifestyle, attitudes, user types, attitudes toward advertising) • Life events/life stages (getting married, home purchase) • Leisure activities and interests • Role in household • Context (mood, location, alone/in company) • Brand relationships (purchase, loyalty, integration with clients' proprietary data) • Channel relationships (media usage, location, channel usage and preferences, multitasking/solus activities)
Stage 4	Finding the key idea	Using the HUB to support/reject ideas and hypotheses; establish key platforms; review prospective partners for joint programmes
Stage 5	Channel selection	HUB and CHANNEL PLANNER to • Define each channel's role and weight • Explore advertising receptivity and likely response • Evaluate cross media/multi-media use
Stage 6	Multiplier effect	Integrate selected channels to achieve maximum impact • Solus/parallel media use • Net contribution of each channel to the total mix • Evaluate potential for direct marketing, mobile, digital channels
Stage 7	Measure effect of communications strategy	Using the CHANNEL PLANNER • Individual and combined coverage and frequency delivered by channel or vehicle • Evaluate multi-media combinations • Checking frequency distribution • Bespoke media weighting according to clients' campaign goals

1.3. Methodology

After intensive testing and based on experience with the BBC's Day in the Life time-budget studies (carried out by TNS using a PDA device the collect electronic diary data) it was decided to collect data for the Hub Survey via a detailed self completion questionnaire (Appendix 2a) combined with a seven-day electronic diary using a PDA device, which respondents used to record the following in half hour intervals (Appendix 2b):

- Where they were
- Who they were with
- What they were doing (if travelling – mode of transport)
- Media consumption
- What mood they were in
- Whether they were relaxed or alert
- At the end of the day they were asked if during the day they
    - visited the cinema
    - received advertising mail
    - received telemarketing calls
    - received commercial text SMS

There was no face-to-face contact with respondents. All recruitment and briefing was done via telephone and questionnaires and PDA's were sent and collected using standard mail delivery – only 6% of PDAs 'got lost' in this process. The resulting data nevertheless required some extensive editing and of the 8,000 original panellists only 5,010 (67%) were accepted for final analysis, which was based on close to 1.7m half-hour time inputs.

The second stage comprises the development of individual exposure probabilities for each respondents and media vehicle and the integration of the industry currencies onto the hub survey (Table 2).

Table 2: Currencies and other data sources used in TouchPoints

Channel	Organisation/Survey name	Notes
Television	**BARB**	
Radio	**RAJAR**	
Print	**NRS**	National newspapers only and magazines
Regional Press	**JICREG**	Regional newspapers
Posters	**POSTAR**	
Cinema	**FAME**	Referred to as Cinema and Video Industry Audience Research (CAVIAR) in TouchPoints 1
Online	no currency status, measurement as part of the Hub survey for TouchPoints 1 +2	Since 2010: UK Online Measurement Company (**UKOM**)
SMS Text	no currency status, measured as part of the Hub survey for TouchPoints 1 + 2	
Direct Mail	no currency status, measured as part of the Hub survey for TouchPoints 1 + 2	

This phase of TouchPoints is probably one of the most ambitious data integration projects ever attempted. More detailed descriptions are available from various sources (Baker 2006, IPA 2006, Robison, Beck, Wilcox 2006) and in chapter 2 of this report. One key difference to other fusions of media data is the availability of media usage data in the Hub survey, which has provided additional fusion hooks and helped to preserve more of the discriminatory power of the donor (i.e. currency) surveys.

Due to the complexity of this task TouchPoints data is released in two stages. Results from the Hub survey (since TouchPoints 2 these already includes the integration of TGI data) are usually published two to three months before the Channel Planner with the full fusion of the currencies becomes available to subscribers.

1.4 Changes and developments

There have been no principle changes to the survey since it was first introduced in 2006 but the IPA has always been open to feedback from end users and where necessary used learnings from one survey to make improvements to the next (for a detailed review of the changes see Robinson 2009).

Fieldwork for TouchPoints 1 and 2 was carried out by TNS, which had been involved in other surveys using PDAs as a method of data collection. For TouchPoints 3 the contact was switched to IpsosCT, which is also responsible for the National Readership Survey and thus could offer to re-contact NRS respondents to recruit the PDA panellists.
For all three TouchPoints surveys the data integration process has been the responsibility of RSMB, one of the market leaders in data fusion and weighting. One major change regarding the sequence in which currencies are integrated has been made in 2008: since TouchPoints 2 the Hub survey when launched already includes the TGI product usage data, making this new ‘superhub’ even more useful for subscribers from the start. With TouchPoints 1 users had to wait three months until the full Channel Planner (then know as the Integrated Planning Database or IPD) became available to get the full benefit of the Hub data.

For TouchPoints 2 both the self-completion questionnaire and the diary questionnaire have been improved, specifically to include more detailed information on digital media and on the usage of traditional media’s websites. New questions on video and audio streaming and VOD have also been added. In addition the shopping sections have been expanded to include a wider range of outlet types. The lifestyle has been reviewed and statements relating to environmental issues and attitudes toward new technologies have been added. For the Channel Planner a modelled ‘currency’ for online search was developed “to allow users to input gross impressions by search engine and product category to quantify search’s contribution to multi-media schedules” (Robinson 2009).

TouchPoints 3 promises further improvements and refinements, such as an extended section of the important Word-of-Mouth channel, which has been developed in cooperation with the Keller Fay Group, a US specialist in WOM measurement. The additional data will provide a better understanding of the role of 'influencers' and their relationship with media and demonstrate the role of advertising as a generator of valuable word of mouth activity.

1.5. Support and Outlook

Support for the TouchPoints initiative has not been universal. It is clear that in the run-up to the launch of TouchPoints 1 in 2006 expectations had probably been raised to unrealistically high levels and in practice everyday work with the data turned out to be considerably more complex and time-consuming than many subscribers had anticipated (for more details see chapter 3). After the initial euphoria support for and usage of the data seemed to fall off and a number of subscribers decided not to continue with their funding.

> *"We just felt we didn't really make enough return on our investment in TouchPoints 1 as we were then too much focused on our print offers and hadn't really integrated other platforms fully. Today this view may be changing again"* (head of research/media owner)

> "*When Touchpoints 2 came out the whole insight team was charged to use the data as much as possible. When we reviewed the situation we realised that TouchPoints can't always give us what we wanted, which is rich data for all our television channels, our website and our interactive TV platform. In the end TouchPoints doesn't give us enough additional information to benefit our sales efforts. We already have to buy BARB and TGI data and it is difficult to justify the extra budget"* (head of commercial insight/TV channel)

A further very important factor that had a negative impact on the popularity of the second release was the looming economic downturn, which hit the UK industry and consumer confidence hard and even at the time of writing this report the jury is still out as to when real and sustained growth will return. Overall advertising expenditure fell by for two consecutive years, according to the latest IPA/Bellwether Report, hitting the marketing and research budgets of **media owners** very hard, which partly explains their decision not to renew their subscription. Another reason for the limited support by media owners has to do with the way many sell space or airtime.

> *"TV companies use BARB and TGI to sell against each other and they don't generally sell against other media, such as print or radio."* (head of research, TV)

> *"We used to sell our titles rather than newspapers as a channel"* (head of research, media owner)

Advertisers never showed much direct interest in TouchPoints but in fairness it should be pointed out that in the UK very few advertisers get directly involved in media research and planning. Rightly or wrongly, most matters concerning media decisions and media selection have been transferred almost entirely to media agencies. Advertisers rarely participate in any of the ‘Joint Industry Committees’ that are responsible for audience measurement and largely leave representation to their association, the Incorporated Society of British Advertiser (ISBA). Currently the sole exception with regards to TouchPoints is the Central Office of Information (COI), which handles all official government advertising, such as health warnings, drink-driving campaigns, anti-knife initiatives aimed at young men and many others. The COI has mandated that every agency working on or pitching for its business must use TouchPoints data at some stage, either for strategic insights or cross channel planning. The COI analysts clearly derive huge benefit from the usage of TouchPoints and usage has further been encouraged by the organisation’s head of marketing and communications, who was a prominent member of the IPA Media Futures Group that developed the TouchPoints idea in the first place back in 2003-04. Some of those interviewed for this report had doubts as to whether the organisation would have taken an equally strong position on TouchPoints without his presence.

Given the stance of the COI and the fact that the organisation has been one of the top three UK advertisers (in budget terms) over the past 10-15 years it is not surprising that many **agencies** are pitching for its business (and indeed campaigns have traditionally been spread over a large roster of advertising and media agencies). As a consequence almost all major network agencies as well as some of the independent outlets are subscribers to TouchPoints.

> *“We work on COI business and the COI mandates the use of TouchPoints”*

is one of the most regularly quoted reasons why the survey is used. In addition some of the Media Futures Group members are heading key agencies and as such operate as champions for TouchPoints within their companies.

There is of course nothing wrong with this – most major initiatives rely on individual champions in order to succeed in early years.

> *“Take-up of TouchPoints may not have been as rapid as some in the industry had hoped but there can be little doubt that the COI’s insistence of using the data has been a massive driver”* (business director/agency)

It will be critical for TouchPoints 3 to reduce the reliance on individual champions and ensure that the survey creates its own momentum to drive it forward. It remains to be seen whether the ‘tipping point’ can be reach during this year on not. The feedback from the industry on this is generally cautiously optimistic.

Part 2. The Hub plus Fusion Concept

Data integration has a long history in the UK. Since the early 1990s the Target Group Index (TGI) has been used as the donor survey to be fused with BARB, to enrich the official TV currency with the wide range on product and brand information contained in TGI. Thirteen common hooks were used (demographic, TV hardware ownership, weight of viewing). The degree of regression to the mean (RTM) varied – for consumer goods (asked only of housewives there was virtually no RTM; lifestyle and/or attitude related purchases asked of all adults showed less retained efficiency (in some extreme cases there was a 23% RTM) but the overall "RTM was an encouraging low 14%" (Bedwell 1991). Subsequent BARB/TGI fusions retained this level of efficiency "today the BARB/TGI fusion is viewed as highly successful" (Baker 2007) and new data is released quarterly.

The fusion process deployed for the TouchPoints survey is considerably more complex as it involves a multitude of individual databases and a more detailed description of the technical issues of the TouchPoints fusion can be found in various IPA material and conference papers (Robinson, Beck, Wilcox 2006; IPA 2006, Wilcox, O'Sullivan 2007, Baker 2006)

The TouchPoints survey itself (i.e. the central Hub survey) is a single source database measuring multi-media consumption habits of just over 5,000 respondents. In some cases the media data from the Hub survey is very similar to the currency, for example for radio both TouchPoints and the currency (RAJAR) collect half-hour listening data; for print the self-completion questionnaire was used to record newspaper and magazine reading replicating the NRS questionnaire. In other cases, such as Outdoor the Hub only provides a surrogate measure in from of time spent travelling by mode of transport.
Furthermore, respondent level data fusion is only possible with those currencies that report at individual respondent level (TV, radio, print, TGI). Alternative integration techniques had to be used for other currencies.
Last but not least the significant variations in sample size posed another problem. The Hub survey is based on approx 5,000 respondents, but others are considerably larger (the BARB panel reports on 11,000 individuals, TGI is based on 25,000 respondents, the NRS sample is around 36,000).

2.1. Expansion of the Hub survey

A first step in the integration process required the expansion of the TouchPoints sample by re-weighting it to an appropriate host survey - one based on a large *and* random sample. The 50,000-strong BARB establishment survey fulfils both criteria.

(a) As a random sample it overcomes any possible bias within the smaller TouchPoints sample by weighting the data to the correct population profile. For example the original sample of TouchPoints 1 overstated 'technophiles' with 70% claiming to have an internet connection at home (whereas the BARB ES showed only 51%). Clearly some re-weighting was required in any case.

(b) Due to the size of the BARB ES the full sample of the various currencies can now be used in the subsequent fusion with this recipient file, ensuring a rather more even use of donor respondents. For example, the NRS sample is seven times larger than the TouchPoints sample and a standard fusion would have resulted in using less than 15% of the currency sample and its effectiveness would be severely reduced

It was therefore decided that the Hub survey should donate media and other diary measures to the Establishment Survey, whose demographic and socio-economic structure is an industry standard. For every TouchPoints respondent there exist a larger number of respondents in the Establishment Survey who have the same demographic profile. The exact number of matches found varies because the Establishment Survey has a more representative profile. The common variables included various standard demographic and socio-economic measures combined with media measures such as multi-channel home, number of TV sets at home, internet access, and broadband connection. On average Hub donors were used approx ten times.

It must be stressed that this process of weighting and replicating the original TouchPoints sample does not in any way increase the effective sample of the Hub survey; it simply means that overall the sample is now more balanced and the currency samples can be better preserved in the next stage of the integration process.

2.2. The Integrated Database

In order to allow cross media schedule comparisons the various currencies needed to be integrated into the TouchPoints Hub survey. Because currency surveys are conducted in different ways no single integration technique was available for this task and different methods had to be used:

- Respondent level fusion was used for print, radio, television, and product usage surveys
- calibration was used to integrate data for cinema and posters
- profile matching was used for the regional newspaper survey
- data for online usage, direct mail, and SMS was already contained in the Hub survey, as there were no industry currencies were available during TouchPoints One and Two (online usage data from the newly established UKOM is due to be fused with TouchPoints 3 in fall of 2010).

Whilst demographics are generally strong discriminators of behaviour for all media there is still a concern that fusion on purely demographic variables does not always perform well against life-style lead products, such as cosmetics resulting in higher regression to the mean. The TouchPoints Hub survey provides media-based variables that can be used as additional hooks together with demographic and geographic variables. The principle of the fusion process is to match respondents in the currency (donor) survey with respondents in the Hub (recipient) survey who have the same demographic and media imperative profile. These donors' media currency data is then assigned to the TouchPoints recipients and replaces their original TouchPoints media data. (Wilcox, in IPA 2006).

The end result of the fusion procedure is an *integrated database* with the following information now available for each respondent:

Standard demographic, geographic and geodemographic classifications
Product usage and ownership from TGI
Media usage records from the individual (and now integrated) currencies

2.2.1. Personal probabilities

For multimedia reach and frequency planning the different contact definitions that have evolved over time for each media channel required a solution. With the exception of BARB (a panel with long-term viewing records for each panel member) other currencies have only short-term contact measurement (reading in recent publishing interval for print, a one-week quarter hour diary for radio), and therefore depend upon some form of probability expansions to estimate the achieved longer-term contacts over a campaign schedule. As each media currency has a different probability model for this expansion, the solution was to adopt - as a common denominator - personal probabilities, which cover all media channels. If a person does or doesn't make contact with a specific media event (e.g. a TV spot, yesterday's issue of a newspaper, a radio station in a particular quarter hour) then their personal probability is one or zero, but this says nothing about that person's probability of making contact with the equivalent event on another day or in another week. What needed to be calculated were the underlying probabilities of making contact with each media event, i.e. a number between 0 and 1. Then if that media event is repeated a number of times, a binomial expansion can estimate a particular person's probability of making 0, 1, 2, 3……contacts.
For TouchPoints this approach is used for television viewing, readership, radio listening, direct mail and SMS text messaging. Other media are not available for planning at such a granular level and a different approach was used, based upon underlying rates of exposure; for example the number of poster sites passed in a week. By scaling these rates to the weight of a particular campaign, the Poisson model can be used to expand to a particular person's probability of making any given number of contacts. Personal probabilities for outdoor, cinema

and online are calculated in this way. (A more technical summary of this process has been written by Wilcox, in IPA 2006).

2.3 Quality of the TouchPoints integration process

The IPA commissioned consultant statistician and fusion specialist Ken Baker, to assess the quality of both the Hub expansion and the subsequent currency fusions.

With regards to the Hub survey he found that, age aside, the resulting degree of exact matching was equivalent of 17 out of 21 characteristics being perfectly matched for each respondent. Exact matching is more problematic for variables such as age (especially for actual age but less so when standard age groups are used), social class, or terminal education age (TEA), but once the criteria are widened to ‘matching exact plus one cell out’ the degree of fit rises to 80% and over. “This is totally in line with the degree of exact matching with classic fusions such as BARB/TGI” (Baker 2006).

As to the various currency fusions the results are generally very encouraging:

- RAJAR: most matches achieved 80% or higher efficiency on exact matching; standard age groups achieve 61% (increasing to 90% for exact match plus one out). “The matching process worked as well as a typical fusion” (Baker 2006)
- BARB: matches achieved a slightly lower efficiency compared to radio, according to Baker is at least in part due to the relative small size (just under 8,800) of the BARB donor file, which required each donor to be used on average 5-6 times but he nevertheless concludes that “the match rate is acceptable in comparison with other fusions” (Baker 2006).
- NRS: Again Baker’s conclusion is positive (“the general level of matching on common variables is up to the level of a normal fusion”) but he does point out that the algorithms matched ‘disappointingly’ on age and social grade.
- TGI: of the 26 common variables used, on average each respondent was matched perfectly on 20 of these variables, making “this the most accurate fusion to date … exceeding the original BARB/TGI fusion” (Baker 2006)

Overall, Baker’s analysis of the TouchPoints fusion finds little evidence of any systematic RTM and “the overall estimate of RTM is 7%, i.e. 93% of the discriminatory power has been retained by the fusion” (Baker 2006). No further independent assessment has been commissioned for TouchPoints 2 but the IPA is now considering the need for another appraisal in connection with TouchPoints 3 later this year.

(Please see Appendix 4 for a more detailed version of Ken Baker’s fusion assessment and Appendix 5 for examples comparing results between the original currency and TouchPoints)

2.4. Lost in the fusion

Fusions can never completely replicate the original database and some data invariably changes or is missing because it is not transferred into the fused database. Generally speaking only data that is required for schedule inputs is available within the fused data.
For media planners (and vendors of airtime and space) the preservation of the currencies is vital to encourage usage of TouchPoints. This was an important objective for the survey and has certainly been achieved, especially for newspapers, magazines, and radio. For television the fused data on TouchPoints 1 showed a 10% increase in total viewing hours over the original BARB results, which was somewhat surprising, given the use of media imperatives, i.e. only matching heavy/medium/light/non-viewers of specific channels. To correct this all results have been checked and calibrated back to their 'correct' levels achieved in the original currency survey and "for RAJAR and NRS the calibration factor is largely minimal" (Baker 2006). Calibration was used to adjust results, if necessary, against GRPs, coverage and frequency distribution.

With TouchPoints 2 the fused BARB television data shows a much-reduced and smaller uplift of only four percent in TV viewing (prior to final calibration). Some BARB TV metrics are missing in the fused database: the original BARB data shows individual spot ratings; in the fused database this information is no longer shown. Time-shifted viewing is included after fusion but can no longer be separated out.
For newspapers, too, some granularity has been lost. There have been no reports in any systematic change of net reach scores but some readership profiles can be affected by the fusion - after all, it is impossible to control for all variables. Also, the original NRS file contains readership scores based on Monday – Saturday, Monday – Friday, Saturday, and Sunday reading; the fused NRS file only reports on six-day (Monday – Saturday) and Sunday reading. In addition there is no data on 'amount read' in the fused database.
For radio only those stations that achieve a minimum weekly reach of 250,000 listeners (approx. 80) have been transferred – the original RAJAR survey reports on well over 300 stations.

With regards to outdoor media the fusion generally worked well in terms of reach but less well with regards to frequency distribution. Mid-range frequencies (3-6+ exposures) in the fused database are noticeably lower than on POSTAR – this applies to both TouchPoints releases. The Outdoor measurement in the UK has been re-vamped since TouchPoints 2 (for example introducing GPS technology) and there is cautious optimism that the new data set (due out this summer) will improve results.

One final, if self-evident comment: media currencies are updated regularly. The NRS and RAJAR report quarterly, BARB reports on a continuous basis – overnight results are available daily at 09:30 every morning. For the fusion a data file that most closely coincides with the TouchPoints fieldwork is chosen for the fusion onto the Hub survey. For television this means the fused BARB data represents scores averaged over a 12-week period. Seasonality, which can have a significant impact on media consumption, tends to get lost and with regards to TouchPoints 2 the available data is now over two years old. This may well be a crucial issue once the new online data becomes available for fusion via UKOM. Too much is still happening in the digital and online world and more regular updates of TouchPoints may have to be considered for the future.

Part 3. TouchPoints' reception and usage in the UK advertising market

The following comments are largely based on discussions and interview with users as well as non-users of TouchPoints during April and May of 2010 (see chapter 1 for a full list).

3.1. General Acceptance of the TouchPoints Concept

Earlier in this report (see 1.5. Support and Outlook) of the results from these discussions have already been covered, mainly TouchPoints' heavy reliance on individual champions and the economic downturn, that hit the survey (and budgets of potential subscribers) after the second data release in 2008 and made it more difficult for the IPA to increase its subscriber base.

Nevertheless, none of the thirty individuals interviewed, whether they were currently users or non-users of TouchPoints raised any principal objections or doubts about the validity of the concept and all expressed the view that the survey is on its way

3.2. Data usage

The degree to which the TouchPoints data has been used over recent years depended on a variety of factors and many of the key reasons that are mentioned as detrimental have little to do with the survey itself. Some of these factors are nevertheless important issues that have an almost disproportionate (negative) influence on end users' attitude towards TouchPoints and those responsible ignore them at their peril.

Only one person interviewed expressed some general doubts about the usefulness of the survey.

> *"Five years ago, when I was still working in a traditional media agency I would have loved to have TouchPoints but now it does not really fit in with this agency's philosophy. The hub element does not cover anybody under the age of 15, and young people are an important segment of the population for many of our campaigns. The Integrated Planning Database is only good if the aim is to maximise reach and frequency across different channels. Our campaigns are aimed to change behaviour and maximising effectiveness is more important than maximising net reach"* (senior strategist/agency).

3.2.1. The Hub Survey

It is very obvious that the data from the Hub survey is much more widely used than the IPD or Channel Planner. Some claimed that Hub usage accounted for up to 75-80% of all their TouchPoints analyses, but there is some evidence that over the years the balance started to shift to a more even usage of all TouchPoints' elements.

The Hub survey contains a number of key elements that make this part of the database particularly attractive:

- The time factor, which brings to life a typical day of British consumers, showing what they do and where they are at any given part of the day. The data shows what is being done throughout the day, as well as activities that peak at certain times during the day. Comparisons can be made between different target groups and data is available for every day of the week, allowing comparison between working days and weekends.
- Activities, including the consumption of a wide range of media channels can be split into solus activities and 'multi-tasking' and further refined by analysing whether the respondents were alone or in the company of others.
- Respondents also recorded how they felt at specific time intervals (good mood vs. bad mood, relaxed vs. alert). Some respondents felt that this question could be better phrased, indeed the antonym to 'relaxed' should be 'tense', 'anxious', or 'stressed'. When the data is included in an analysis results are not always particularly enlightening. Some people may be in a bad mood at certain times on certain days but it doesn't really explain why this should be and consequently this data seems to attract less usage.

Most of those interviewed mentioned two, equally important benefits they derive from the use of the Hub data.

Roughly half of them claimed to have gained new insights into consumer behaviour and media consumption pattern, all of which contributed to significantly to the overall quality of their strategic planning and the development of ideas.

> *"We use the Hub data for segmentation work and target group information as well as a lot of the time-diary data. We get a lot of insights that are useful when pitching for new business"* (planner, agency)
>
> *"There were learnings that we did not expect, for example in the area of parallel media use between television and online. There is some interesting data on how people download TV programmes and videos, use VOD and mobile access. Using TouchPoints we could recommend a TV plus online campaign, whilst previously they only used TV"* (planning director, digital agency)
>
> *"Initially we only used the Hub data but this has changed now. We use it for insight in people's activities and media usage and for broader channel selection* (insight manager, agency)
>
> *"The Hub was very good; especially the day-part information gave us more insight and a lot of interesting information for our sale presentation"* (head of research, media owner)
>
> *"We are currently not subscribers and the Hub data could be very useful for our marketing and promotion efforts"* (head of research, TV)
>
> *"With TouchPoints 3 coming out soon the Hub data should provide us with a lot of trend analysis over the past five years. It also gives us very granular data on media usage throughout the day and across the week"* (head of research, YV)

At the same time there were many (generally more senior planners or insight/ research managers) who felt that whereas few truly new insights were delivered the data was nonetheless important as TouchPoints provided valuable empirical evidence to back up long-held opinions and assumptions.

> *"We didn't necessarily gain a lot of new insights about our readers but had many of our assumptions confirmed. In an age of accountability this benefit should not be underestimated"* (strategic insight specialist, media owner).

> *"We nearly always use the Hub survey. The time diary is particularly useful and over time we got quite good at using it to its full potential. On balance the data is still used more often to back something up but sometimes we get utterly new and fresh insights just by playing around with the data"* (insight manager, agency)

> *"There have been very few new killer insights"* (insight manager, agency)

3.2.2 The TouchPoints data integration

Despite consistent and repeated prompting virtually nobody of those interviewed had any issues with the general concept of data fusion or the method chosen by RSMB for TouchPoints.

> *In the last few years people have become used to what data fusion can do. It is now a very commonly used technique by many of our clients who fuse their own customer segmentation data with TGI or other surveys. It is the best and most cost effective option we currently have"* (insight manager, agency)

> *"Data fusion is now very accepted as long as it is transparent and accountable. There are always plus sides and downsides but with TouchPoints we are definitely gaining more than we are losing. We are no closer to a single currency for everything but TouchPoints is getting us there. If the survey did not continue it would be a big step backwards"* (head of commercial insight, TV)

In the case of the more *junior media planners* this is not really surprising, as they often lack the basic knowledge of statistics and are neither trained (nor encouraged) to get involved in technical discussion. The main response from almost everybody was that they trust a survey that has the backing of the IPA and those more senior planners and insight managers trust RSMB (an industry-wide acknowledged specialist in TV research, data weighting, and fusion) and the positive assessment of the fusion process given by Ken Baker, an independent fusion specialist.

> *"I trust the IPA and RSMB to deliver the best possible quality data"* (insight manager, agency)

> *"Because the data comes from the IPA, a reputable and established body we and our agency feel comfortable using the information" (*head of marketing services, advertiser)

> *"I go with the experts like (Steve) Wilcox and (Ken) Baker. What's more, the results make sense, and if something makes sense it is probably right. At top level there is absolute consistency between TouchPoints and the original BARB data. It is very close .. I am very pleased"* (head of research, television)

> *"I trust the IPA and their research contractors to get it right"* (senior strategist, agency)

A couple of those interviewed were honest enough to admit to a lack of understanding of the fusion process:

> *"It's all a bit complicated and nebulous so people tend not to worry about it (fusion and data collection method) too much"* (planner, agency).

Only one of those interviewed voiced some generic concern about data integration, referring to the danger of ending up with

> "*bland data and regression to the mean. For example I would have preferred the original hub – the expansion to the BARB Establishment Survey has probably diluted the results. Too much fusion prevents any unique insights from coming out" (*insight manager, agency),

but when pressed could not give any concrete example of this happening with TouchPoints.

In general, the UK advertising industry seems to take a very pragmatic approach and understands that there is always a trade-off between different research approaches.

> *"In the end it is an issue of practicality vs. perfection. Sometimes we need to make compromises to move things on. Too often we only talk for years about new ideas and concepts and never do enough. The ambition to bring together all platforms was in important one. Single source is a wonderful concept but it becomes apparent very quickly that it is not a practical way forward".* (head of research, media owners)

3.2.3. Sampling Issues

Another issue that was mentioned frequently was the sample size of the (original) Hub Survey. Most users of TouchPoints data are (at least vaguely) aware of the difference between the original (5,000) and the expanded (50,000) hub sample. Unfortunately the software providers (Telmar, IMS, and Kantar) show the expanded Hub with an unweighted count of 50,000 for the total population (and whatever equivalent for selected target groups). If users remember (there are no prompts to remind them) they usually divide the number shown by 10 to get an idea of the actual hub sample. It is of course by now means guaranteed that every planner does this on every occasion. It is quite possible that someone sees an unweighted count of 400 and embarks on an elaborate analysis not realising the actual sample size. (The author believes that in future the software bureaux will rectify this and some warning will be given on screen).

The limited sample has other consequences. Regional planning can be difficult (especially for narrowly defined target groups) and generally speaking TouchPoints is being used mainly to evaluate national campaigns.

> *"TV is planned and bought mainly nationally these days and regional sample sizes are not a big issue. For network audiences the Hub sample is sufficient" (*head of research, TV)

> *"We don't really do much regional planning so this is not a massive issue for us"* (planning director, digital agency)

*“Sample size is OK for top line level but for smaller media owners or specific targets it can become an issue” (*planner, agency)

“There are a lot of things you have to bear in mind when working with TouchPoints data. You have to remember to divide the grossed-up sample by ten and sometimes people simply forget. There is currently nothing to flag this up”. (insight manager, agency)

The hub sample also limits the usage of TouchPoints for media owners. This is less of an issue for radio stations, which are often bought in groups by genre rather than every station individually. As to print media TouchPoints clearly favours newspapers with larger readership (such as the Sun, News of the World, Sunday Times Daily Mail) but for titles such as The Guardian, Observer and The Times sample size can be a real issue and limits how deep they can drill into the data. That said none of the current non-users claimed that sample size was a major factor in their decision not to subscribe.

There seems to be some confusion as to the apparent (50,000 as shown), actual (5,040 Hub) and effective sample size (never officially calculated, but Baker 2006 gives an estimate of just 3,400) and a number of people expressed the need for better guidance on actual sample size and the impact on confidence limits. The much used ‘divide by ten rule’ may indeed be a little simplistic but is currently the best advice available.

3.2.4. Frequency of data release

Overall users had mixed comments on this. In an ideal world most agree that TouchPoints data should be collected throughout the year and released at regular intervals (the BARB/TGI fusion is now updated quarterly). At the same time everyone is realistic enough that this would have huge cost implications and few are hopeful, that the necessary budgets can be found in the current economic climate.

Attitudes may of course change once the new Nielsen online measurement results become available from UKOM. Usage patterns in the digital online world are still evolving and a number of users expressed their concern.

“Two year old data is not ideal but we can’t use this as an excuse not to use TouchPoints. We have to be realistic.” (planning director, digital agency)
“Working with two year old data for our rapidly growing online platform is getting problematic” (strategic insight specialist, media owner)

“In the end we expect TouchPoints to give us some broad brush strokes, for example on a typical Monday evening more people like to watch television in combination with other media and these patterns don’t actually change that much. It is also down to the planner’s intelligence to get the best interpretation of the data” (business director, agency)

“We recently had a client who wanted to integrate their latest customer segmentation data into TouchPoints but decided against when they found out that the data was

almost two years old an they did not want to wait six month until the next release" insight manager, agency)

"Once we have the new online currency fused into TouchPoints the frequency of data release may well become more of an issue" (planner, agency)

"Every two years TouchPoints needs a major re-fresh. But I am not sure whether media usage changes significantly enough to warrant more frequent updates" (head of marketing services, advertiser)

In future there may well be increasing demand for more frequent updates as it is doubtful whether the new online data when fused into the 2010 TouchPoints Hub is still of much use to digital planners in 2012.

3.2.5. Digital channels

Most of those interviewed accepted the limitations of information regarding the digital world. In the absence of an industry currency in the UK, data had to be collected within the Hub survey itself. Given the richness of the hub data this in itself was a major step forward in understanding how the British public use the Internet and mobile devices. Visits to some 50 named websites, 40 site genres, and usage of five major search engines are measured. The self-completion questionnaire includes a detailed section on mobile (cell) phone usage and the electronic diary records mobile phone usage as well a reception of commercial text messages (see Appendix 2a and 2b).

Not surprisingly, some found the digital channel data of TouchPoints 1 and 2 of limited use.

"Many of the questions relating to online and digital come across as fairly generic. The time diary stuff is great for a very general picture of internet usage, but it is not detailed enough. As an agency we would look at 300-500 websites for a client but on the TouchPoints Hub survey there are just around 30-40 websites. We would know what there is to know from other sources anyway and there is nothing really new. Constructing a media plan cross channels worked reasonably well for TV, radio or print but not so well for online". (planning director, digital agency)
"For many of the communication channels we are using, especially online and social media the Channel Planner is of limited use" (senior strategist, agency)

There is now great expectation that the new online currency (Nielsen's NetRatings) will provide significantly more data on online usage.

"Digital media was poorly represented until now but this will be rectified with TouchPoints 3 and UKOM data" (research manager, agency)

"Online plans can be quite complicated and you have to take them back to a much more generic level within the Channel Planner and that doesn't really give us what we want. This will hopefully change with the arrival of UKOM data" (insight manager, agency)

"I really hope to see better digital and mobile data in the future" (insight manager, agency)

"We wanted to see Nielsen and comScore data fused into TouchPoints before but as they as they did not have currency status we would have had to do this on our own. With UKOM there will be a huge change in the data for digital planning" (head of research, media owner)

But not all are completely convinced that digital and online planning will improve as much as many hope:

"Until last year most TV channels had a separate sales operation for their online offers, and often sold against each other. Now these departments are being integrated which should make TouchPoints more valuable to individual channel operators to sell across both platforms. But I was shocked by how poor UKOM still is, especially the total lack of demographic data" (head of research, TV)

According to James Smyth, UKOM's director of operations Nielsen is now in the process of re-contacting their 35,000-strong panel to collect members' basic demographic and location details, which are required before any results can be fused with TouchPoints 3 later this year. Other issues, for example which set of Nielsen data is to be fused are not yet resolved and this is very much work in progress at this stage.

3.2.6. Working with TouchPoints data

Given that the release of TouchPoints 3 is now imminent there has recently been more modest use of the survey due to its age. This is simply a temporary blip and was to be expected. There are much more serious issue affecting the usage of TouchPoints: most of those interviewed spoke of

- a longer than expected learning curve
- difficulties understanding the data available
- complex coding requirements
- poor software support

3.2.6.1 Understanding the multi-media world

As with any new initiative end users need to be willing to learn and embrace the likely benefits offered. Expectations were high in the run-up of the first launch in 2006 but potential users quickly ran into difficulties analysing the data. Many found the huge amount of information contained within TouchPoints difficult to understand and struggled with complex coding requirements. This had a major impact on usage, especially the use of the Channel Planner:

"The IPD was used less often, partly because there initially there was little interest from agencies but also because it was difficult to use. It was not easy to explain the procedures to junior staff and only experienced planners and research executives really understood what they were doing. In the end we had to create a position for a specialist within our ad planning group" (head of research, media owner).

"The IPD is just too complicated to handle unless you use it very regularly, which we don't" (head of research, TV)

"We found planning for regional media very cumbersome" (planner, agency)

"TouchPoints provides too much data – we already have an extensive proprietary research programme including a 30,000-strong return path panel and I simply do not have the staff to work with yet another large database. From what I hear it requires a fair amount of training and learning in order to take full advantage of the benefits offered by TouchPoints" (head of research, TV)

"Our sales people are print and online specialists. They were hesitant to use other channel data in presentations as they do not really understand the planning parameters for example for television and they feel uncomfortable discussing TouchPoints data and multi-media campaigns with their agency contacts. … I now for a fact that my TouchPoints charts are sometimes deleted by our sales executives" (strategic insight specialist, media owner)

"Sales staff usually insisted that a member of the insight team would attend agency presentations that included TouchPoints material" (head of research, media owner)

"Our planners have direct access but we had to develop some internal tools and templates to simplify their task – a kind of TouchPoints Express. More complex analyses are almost always referred back to a specialist within the insight group" (insight manager, agency)

There clearly is some disconnect between the media research community and senior planners, who have a better understanding how the communications model of different media channel works, and the planners, buyers and vendors of space and airtime who work at the sharp end of the business. The latter may pay lip service to media neutral planning but few have any in-depth understanding. The industry may well be multi-media minded, many individuals are mentally still in their traditional silos, whether by choice (or inertia) or because the way many media agencies are structured forces them into this position.

Not all of those questioned agree and there are those who are more positive in their approach and use the Channel Planner not as a barrier but as a tool to educate people about multi-media issues and bring them out of their traditional silos:

"The Channel Planner is a great tool to get more people to become more multi-media literate and has helped to drive changes within our agency. Of course, a lot of time had to be invested to get individuals to understand the data" (insight manager, agency)

"We encourage everybody to use it – from planning directors to media planners. Within our agency the more senior planners and business directors are encouraged to challenge the more junior colleagues in their teams to use TouchPoints. The pressure to learn has to come from all directions" (business director, agency)

"TouchPoints 1 was a real struggle and we new that the data wasn't used correctly. With the next data release we decided to invest in a lot of internal training. We wanted to avoid the creation of specialists and provide a level playing field for everybody" (insight manager, agency)

3.2.6.2. Software and Systems

Without doubt the most frequent problem areas mentioned concerned the software packages offered by the three main bureaux services in the UK: Telmar, IMS and Kantar/Choices (New Age Media Systems started operations in the UK a couple of years ago but at this stage does not have any clients that use TouchPoints).

The issue became so serious that the IPA commissioned an independent media systems specialist Robin Angell to assess the functionality of all three packages as well as the general service and help-desk facilities on offer. Significant differences in service levels quickly became apparent and not surprisingly there is a strong correlation between data usage and bureaux service used. For many the experience has been (and often still is) very frustrating.

> *"With our previous provider there was a lot of inputting and rather little output. Users were very worried about getting things right. We recently switched and our new provider offers more scope, better training and is much more user-friendly"* (planner, agency)
>
> *"My staff was getting very frustrated as it was so difficult to get data out of the system, despite great efforts and help from our software provider. I think with the time element TouchPoints is more a three dimensional study and the bureaux found it difficult to accommodate the data within their standard packages. They tried to shoe-horn this three dimensional data into a system that wasn't developed for it""* (head of commercial insight, TV)
>
> *"We had some training from the IPA and our software provider but there was a need for a lot of internal training and we had to adapt our own systems to handle TouchPoints data more easily"* (insight manager, agency)
>
> *"We had real problems using the data with our software provider. We discovered so many errors that our provider should have edited before the data was released to us"* (head of research, TV)
>
> *"The software package has been one of our major issues and the interface between us and the data isn't exactly easy. It takes a long time for anyone to learn how to use it correctly"* (business director, agency)
>
> *"Unlike TGI or the currencies, TouchPoints is not a tool that the typical planner uses every single day and therefore it doesn't easily become second nature. You almost have to learn it from scratch every time it is used. Our supplier has simplified things with new coding procedures and working with the data is a little easier now"* (insight manager, agency)
>
> *"We had some major teething problems with our software provider. There still is a lot of complex manual one-by-one coding, which is extremely time-consuming. It takes quite a while to find your way around the data"* (planning director, digital agency)
>
> *"As an agency we went through an 18-24 months learning curve with a lot of training from our software provider and development of our own internal systems to generate charts"* (research manager, agency)

The lack of standardisation across al bureaux sometimes causes an additional problem, when different agencies work on the same client, for example with one looking after 'traditional' media channel and another agency being charged with digital work.

“We also find it difficult to share data with other agencies that work on the same campaign. We can’t always exchange the codes for the target group definition when they use a different software house” (planning director, digital agency)

3.2.7 Demand for TouchPoints data

The Central Office of Information (COI) is so far the only advertiser whose head of marketing has mandated the use of TouchPoints data and thus helped to encourage many agencies to subscribe to the data. Gradually agencies began to us TouchPoints analysis when working on other clients’ briefs and especially when pitching for new business it the survey’s popularity started to grow as subscribers slowly learned how to analyse the data.

“Apart from COI other clients, especially Kellogg’s and Channel Five (a UK commercial TV broadcaster) are now very interested and we use the data quite regularly” (planner, agency)

“Slowly we see growing demand from clients to see TouchPoints analysis. At our agency it is a must to use the data in all client pitches and for approximately a third of our current clients we use TouchPoints quite regularly” (research manager, agency)

“What we learned by working with TouchPoints helped us to move up the food chain with a number of clients and also in discussions with offline agencies. I would not say that clients or potential clients are expecting to see TouchPoints data but it certainly helps to include it” (planning director, digital agency)

“Many advertisers still don’t really care – they expect their agencies to provide insights and trust the agency uses a reliable source. They don’t really care which survey is used. As to media owners’ sales presentations I never really see them playing TouchPoints data back to our planning group”” (business director, agency)

“We use the data quite regularly now. The big advertisers, such as Unilever, are beginning to have higher expectations that TouchPoints data is included in our presentations, but it has at times been a slow process” (insight manager, agency)

“There are growing expectations in the market place and TouchPoints is well received by advertisers, who often haven’t seen the data, even from their own agencies” (head of research, TV)

“The way the data is presented by our agency when we have our annual review of activities is quite easy to understand and clear. But I also see a fair number of sales pitches from media owners and the inclusion of TouchPoints data is not very common” (head of marketing services, advertiser)

It is certainly true that awareness of TouchPoints is high, but usage levels are still more modest – so whereas some subscribers now use the data regularly, even enthusiastically others are still much more cautious.

“The truth is that if I do not include any TouchPoints charts in our sales presentation I do not get media planners questioning their absence or requesting data” (ad marketing executive/media owner).

“Today TouchPoints is no longer a novelty – everybody knows the survey. We currently do not subscribe and the fact that we don’t use any data does not create problems with agencies or clients” (head of research, media owner)

Part 4: Other Consumer-centric Measurement Initiatives

Many media currencies have long suffered from a lack of demographic and product usage data - TV audience measurement especially could offer more and more detailed commercial ratings in many markets but generally lacked product usage or brand preference data required by many advertisers. Fusing such data (often from TGI-type surveys) with the TV currency data has already a fairly long history. In the UK the TGI/BARB fusion has now been practiced for around 20 years. Even in emerging markets, such as Brazil, Argentina, Chile, and Peru IBOPE have started to offer fusion of their TAM people meter system with the local TGI database.

In fall of 2005 the World Federation of Advertisers (WFA) in Brussels published its Blueprint for Consumer Centric Holistic Measurement. The WFA strongly believed that advertisers' mass marketing model was losing its effectiveness and needed to evolve; with measurement systems required to leave their single media silo approaches and accommodate multi-media measurement. In particular "advertisers (were) unable to measure and track target groups' holistic and synergistic multi-media behaviour. New technologies to enable fast and low cost data collection are not being used", so the document.

The WFA singled out a number of initiatives that fulfilled at least some of its Blueprint objectives, including Project Apollo (US), TouchPoints (UK), and Project Cross Medias (France). Some of these attempts have been abandoned, others have by now developed beyond their early pilot stages. Interestingly, many of these studies show that traditional media reaching large audiences still play a major role in people's media consumption and it is somewhat debatable whether the mass-market model is really broken.

The following gives a basic overview of some of these initiatives based on their current (2009/10) status. The list should not necessarily be interpreted as fully comprehensive as this would go beyond the scope of this project.

4.1. Italy: Eurisko Media Monitor

The Eurisko Media Monitor (EMM) has so far published results in 2006, in 2007 and a full scale, near-continuous survey was launched in March 2009. The 2006 study was covered TV, radio, print, the internet, and direct marketing, in 2007 exposure to supermarkets and outdoor was added based on respondents' declarations.

EMM uses a sophisticated personal meter passively identifying TV and Radio by sound recognition, and recording voice declarations of the interviewee about his/her use of the other media (internet, direct mail, etc) and the meter's bar-code scanning capabilities are used for print readership. The latest version of the device, called 'Dialogatore' has all the features of the previous, plus a touch screen. This enables questions to be sent directly to respondents to be answered in real time.

In future there will be seven waves of interviews per year (28 days per wave) and results will be released 2-3 times a year. A sample of 1,000 adults (aged 14+) is recruited seven times a year respondents are invited to participate for 28 days.

EMM provides minute-by-minute information, either passively (TV, radio) or by answers to questions on the touch screen, or else by scan/voice declaration. The media channels covered are TV, Radio, Print, Outdoor, Internet, Cinema, In-Store, and postal direct marketing. Demographic criteria are collected during the initial interview but consumption of goods and services, other context information (location, with whom, mood, attitude) are not as yet collected.

Support is coming mainly from large advertisers (Bayer, Coca Cola, Fiat, ENI, Kraft Foods, L'Oreal, P&G, Unilever, etc) and the main media agencies. Support from media owners is patchier.

Unlike TouchPoints EMM uses a single source approach. It could theoretically also be used as a 'hub' although so far it has not been used to fuse data with other sources of information.

4.2. France: Le Project Cross Média

A comprehensive, hub style initiative, Le Project Cross Média, has been tested in 2008. The new survey is now based on 10,000 respondents and data is collected in two waves per year.

The survey is conducted jointly by Médiamétrie, (the commercial media research venture owned by advertisers, media companies, and agencies) in partner-ship with AudiPresse (Print audience survey) and Affimétrie (Outdoor audience survey).

The study's purpose is to be a hub to which the various sources of information about the other media will be gradually connected, to form a single integrated database. The plan in 2009 was to report results annually and to gradually integrate other media (outdoor is likely to be the first) and information about consumption of products and services (such as TNS' SIMM and Nielsen HomeScan data).

The universe is the adult population (15+). Unlike TouchPoints the hub information is collected through a single interview (i.e. not through a multi-day panel) over two waves of interviews per year. The hub does not contain time-budget data and information is focused on consumption habits of the main vehicles within each media channel (TV, radio, dailies, magazines, cinema, internet). Media vehicles are defined as TV channels, TV programs, radio stations, magazine and daily newspaper titles, internet sites and portals. Context information (where, with whom, moods and attitudes) is not collected, but questions are asked about the person's areas of interest, sports activities, holidays, music, videos, computer/video games. Demographic and geographic information as well as usage of communication equipment are also recorded.

The fusion of the hub with the various currencies results in a virtual database of 62,000 individuals which have the same socio-demographic characteristics as the 10,000 original hub respondents. The French cross media survey does not publish total contacts achieved with a cross media schedule, only the unduplicated net reach and net contributions by channel.

4.3. Germany: Mindset

In 2007 Germany experimented with a TouchPoints-type approach. Mindset was initiated by Mindshare's Frankfurt office and supported by TV sales house IP, publishing company Burda/Focus, and outdoor specialist Jost von Brandis.

MindSet had the potential to be a hub for fusion with other sources but has not been used for this purpose.

Mindset's main purpose was to describe the activities, including multi-media behaviour (simultaneous or exclusive) of people, along with information about their situation (where, with whom, how the person feels) and their exposure to advertising.

MindSet was financed by Mindshare, IP Deutschland and other Print publishers.

The fieldwork was carried out by Research International during fall of 2006, using a PDA device, which 1,923 respondents were asked to carry for 72 hours combined with a detailed face-to-face interview.

According to Mindshare a further release of Mindset for 2011 is under discussion. In 2009 the agency tested the use of Smartphones as a data collection device for children aged 6-13, who were given the device to collect data about their media usage and other activities over three days.

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4.4. Poland: Touchpoints

In 2009 AGB-Nielsen Media Research piloted a hub-style survey for advertisers, media agencies, and media companies with approx 150 respondents. The concept is based on an adaptation of the UK TouchPoints survey. If successful this initiative will be a good demonstration of the "scalability" of the TouchPoints concept, i.e. its ability to be adapted to smaller advertising markets.

The fieldwork is carried out by Millward Brown SMG using a pre-programmed mobile phone with PDA capabilities, which respondents had to carry for seven days. Additional data was collected via initial face-to-face interview.

If necessary funding targets can be achieved a full TouchPoints survey is planned for 2010 with a total of 4,000 respondents

4.5. Australia

The Australian market offers two services that can be considered, at least partially, to fulfil the WFA's Blueprint requirements. Both are private, commercial initiatives of leading research companies.

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4.5.1 Panorama

Panorama basically consists of *hub plus fusion* results from three sources:

- A hub survey: currently conducted online over 40 weeks providing information on print readership, cinema attendance, use of the internet and time spent out-of-home. The survey also provides information on the consumption of broad product/services categories, as well as attitudes and lifestyle questions. The Universe is adults (14+) and the sample size approximately 22,000 per year.
- The traditional TAM results, from the OzTAM (conducted by AGB-Nielsen Media Research) people meter panel
- The Nielsen Media Research Radio Diary Sample.

The results of the fusion are provided by Nielsen Media Research to clients ten times a year. The hub data is a rolling annual average; the TV fusion data are averages of the last four-week 'survey' from OzTAM; and the radio data is taken from the most recent radio survey. The official 'currency' for print readership data is provided by the Morgan Survey and therefore not available for fusion and Nielsen use their own data for print readership.
The methodology used puts Panorama into the hub + fusion category although the hub provides considerably less information than the British TouchPoints study as it does not use a time-budget approach, nor does it provide information about context and mood/attitudes at any specific point in time.

4.5.2 Morgan Research

Morgan Research is a *single source* study, based on face-to-face interviewing coupled with a traditional 'pen and paper' diary. It is run as a traditional commercial venture, with limited input from industry bodies. The survey provides the currency for readership data but also collects data on the general use of radio, TV, online (duration and type), cinema, direct mail, plus the consumption of a vast range of products/services, attitudes and lifestyle. The annual sample is 55,000 and respondents are invited to keep a one-week diary. Results are delivered four times a year, based on rolling annual averages.

4.6. Japan

The Audience and Consumer Report (ACR) is conducted by VideoResearch, the same Company that provides TV audience measurement from people meters as well as surveys for newspapers (J-Read) and magazines (Magascene).

ACR as a consumer-centric, holistic measurement initiative consists of the combined results of two methodologies applied to the same sample:

- A classic TGI (Target Group Index) Survey, providing information about the use of various media, purchasing behaviour of goods and services, demographic, lifestyle and attitudinal indicators are also covered. The survey is conducted in seven major urban areas covering roughly 50% of the population aged 12-69. The sample size is 8,700 per year.
  The media covered are TV, radio, newspapers, magazines and internet. Additionally monitored are the use of transit systems, shopping habits (department stores and supermarkets), leisure facilities, and amusement parks. Consumption of some 200 categories of goods, products, and services is measured.

- A 'time budget' style panel survey is conducted on a sub-sample of the TGI survey. Currently 1,200 respondents from the Tokyo area are invited to provide information on their activities, for seven days, including use of media, and some indicator of context (location, alone or with others).

The Panel component seems to have the potential to become the 'hub' of a larger cross media measurement system, enabling the fusion with other surveys and proprietary research, similar to the IPA TouchPoints' approach in the UK.

4.7. Switzerland

At the time of writing this report Publica Data and Mediapulse, who are responsible for the TV and radio audience measurement in Switzerland published the results of a new time-budget study in Switzerland. It is not clear whether this study could be used as a hub survey for future currency integration.

4.8. Denmark: Mulit Media Mennesket

In 2009 TNS Gallup, which provides audience measurement of almost all major channels went ahead with a multi-media survey inspired by and closely modelled on the IPA TouchPoints study in the UK. RSMB was selected to undertake the data integration. The Hub data is based on 2,000 electronic diaries of Danish adults aged 15-65. The Integrated Planning Database brings together data from Gallup TV Meter, Gallup Radio Meter, the Index Danmark/Gallup (print, outdoor, direct mail) and the Foreningen af Danske Interaktive Medier (FDIM) Internet survey. The survey went life at the end of 2009.

Part 5. Conclusions and recommendations

This investigation managed to identify a number of issues that had an impact on the usage and acceptance of TouchPoints in the UK. Some of these are more significant than others. What is quite apparent is that the most critical issues that may have had a negative impact on TouchPoints have little to do with the survey itself and are largely outside factors.

5.1. Conclusions

- Overall, TouchPoints has been well received. Initial expectations may have been unrealistically high but after its second data release the survey started to gain traction again.
- One of the most critical issues turned out to be the software support that end-users often did not get from their specialist bureaux. A failure to provide an agreed minimum service level and a lack of accepted standards resulted in serious barriers and discouraged many to use the data to its full extend.
- There is no serious concern or criticism from end-users with regards to the Hub data. Some of the improvements that the IPA introduced with TouchPoints 2 have worked and overall there are no critical issues at this stage.
- In the UK market few experts, if any, voice any principal opposition to the practice of integrating data from two or more different sources. Most people are realistic and accept the trade-off between the granularity of silos and the added benefit of multi-channel planning delivered by fusion. Until someone can deliver an alternative for the same price this is unlikely going to change.
- Ideally, the Hub sample should be enlarged but this has significant budget implications and does not seem to be a top priority for current users. As a minimum requirement thought better guidance as to the actual sample size, its impact on the robustness of the data, and clearer screen prompts should be made available.
- Frequency of data release has not been a major issue for TouchPoints 1 or 2. With the future inclusion of an online audience currency demands for more regular updates will grow louder.
- Digital and online channels had no accepted audience currency measure until earlier this year, when UKOM launched the first release of the expanded Nielsen data. The jury is still out how well UKOM data will integrate into the Channel Planner but for the market it is important to bring the online world up to currency level.
- Being a multi-media consumer (as most of us are these days) is one thing, truly understanding the implications of multi-media usage for planning purposes is quite another. Knowledge levels are not as high as many in the industry may have assumed; inertia and a resistance to embrace new ideas are more pronounced than initially expected. Thos who persevered soon realised that there are no

insurmountable challenges but overall the learning curve has been steep and acceptance slow. A clear and consistent training programme, whether organised internally or via relevant industry bodies is an absolute must to drive understanding and usage.

- Demand for TouchPoints has been growing, albeit slowly over the last five years. There is still more *push* by champions rather than *pull* by the marketplace and demand for the data is probably a little lower than some might have hoped. It is important to remember that new initiatives often take time to gain general acceptance. The TGI survey is today a standard device in any planner's toolbox - it took more than ten years before it was embraced by the industry in the UK.
- The overall success of TouchPoints is reflected in the growing global interest in the 'Hub plus Fusion' concept, and similar initiatives are now either being tested or already fully implemented in a growing number of markets.

5.2. Key lessons and recommendations:

- There is a danger to get bogged down in too many technical details at an early stage. The often-posed question *'How good is a fusion?'* is the wrong question. The key issue to ask is *'whether the use of fusion provides something important that is otherwise not available?'*
- It is important to produce the new tool first, but marketing, sales, training and education programmes, as well as the necessary resources need to be part of the whole process. For end users there is much more involved than simply signing up to another survey.
- If the ambition is to generate more insight how consumers use media throughout the day and across the week a well-designed survey that combines a time-budget study with additional data, such as the TouchPoints Hub survey will be sufficient and in itself provide a rich source of knowledge and understanding
- If the ambition is to bring together all platforms then the use of the Hub survey as a vehicle for integrating the currencies, data fusion along the line of the TouchPoints model is a practical and achievable solution. As long as everybody understands the inevitable limitations and as long as there is a desire to work on overcoming any limitations CIMM should go ahead. Don't waste time pondering about Gold Standard or Holy Grails – that can be reserved for learned papers at conferences.
- Do not let the assumption that there are limitations stop you from embarking in this journey. Nothing is perfect – if want perfection stop using the current currencies immediately.
- There needs to be a trade body or industry organisation that takes a very pro-active role in promotion and consistent education. If left entirely to their own devices some users will become frustrated and even give up.

Part 6: Selected Bibliography

The topic of data integration has been included in each for the Worldwide Readership Research Symposia (WRRS) since the Salzburg Symposium in 1985, when 'intermedia comparisons and fusions' made their first appearance. All conference papers are available free of charge at www.readershipsymposium.org and can be sourced by author, title, or topic. The topic has also been presented at numerous ARF, ESOMAR, and other conferences during the past ten years.
Specifically for TouchPoints a wide range of background documents, briefings, and case studies can be found on the IPA/TouchPoints website (www.ipa.co.uk/Content/TouchPoints-Site-Home). Most documents on this site are freely available to non-members.
The most comprehensive bibliography on the topic of data integration has been compiled by Kantar's Roland Soong. His 'Data Fusion Bibliography' lists over 1,000 papers and articles from 1950 to 2006 and can be found at www.zonalatina.com/datafusion.doc

Papers listed in italics refer directly to the UK TouchPoints project.

Antoine J (1985): A Case Study Illustrating the Objectives and Perspectives of Fusion Techniques, Salzburg Symposium 1985

A report on the fusion of the 1984 French press and broadcast surveys and a discussion of the major learnings with extensive tabulations.

Baker K *(2006): Development of the TouchPoints Planning database – An Appraisal IPA Website*

The paper gives a detailed appraisal of the general issues concerning data fusion and a description of the various fusion methods used to integrate each currency

Baker K (2007): Data Integration Methodologies in Market Research – an Overview International Journal of Market Research, Vol 49/4 (2007)

Battais L (2009): Measuring the Audience of a Medium beyond its Original Form ESOMAR Multimedia Measurement 2009

The paper describes the latest French initiative to provide a multi-media audience measurement tool, using a similar approach to the UK TouchPoints model and its Hub survey.

Bedwell R (1991): Fusion – Britain's Latest Experience WRRS 1991

The paper reviews the fusion of a static (TGI) and a continuous (BARB TV ratings) database. The paper covers various issues, including regression to the mean and finds that whilst overall results were encouraging purchase decisions that are related to lifestyle and/or attitudes can be more difficult to predict.

Beeftink B *(2007): The IPA TouchPoints Initiative – in Practise WRRS 2007*

A review of some of the practical findings and insights from the first TouchPoints Survey from 2006

Carpenter R, Wilcox S (1995): Data Fusion in the British National Readership Survey WRRS 1995

The paper describes an experiment where the annual NRS sample was split in two and magazine readership data transferred from one half (the donor survey) to the other (recipient survey), thus allowing direct comparison between 'fused' data and the original, actual data (fold over test). Average issue reach and duplications for the fused magazines were very close to those in the original donor survey but some calibration was required to bring AIR scores exactly into line.

Collins J, Doe P (2009): Integrating Television and Print Audience Currencies with Consumer Behaviour Data
WRRS 2009

The paper discusses two fusion projects – the integration of NPM television measures into MRI (for target evaluation against MRI's behaviour and attitudinal measures) and the integration of MRI consumer, print and other media measurements into NPM (for television analysis against non demographic targets). The fused databases are described as accurate and actionable

Dodd M, Doe P (2009): Three-screen viewing behaviour complements traditional TV
Admap, February 2009 (pg 18-20)

The article describes how American consumers are using TV, internet and mobiles, based on data from meter panels, single-source measurements, and data fusion.

Ephron E (2002): The Promise of Fusion
Admap, December 2002

The paper gives as short review of one of the first US fusion projects (MARS/NTI)

Frankel M, Baxter P (1988): Fusion, Integration, Ascription, and Imputation
WRRS 1988

A review of the status and direction of various statistical techniques and fusion algorithms and their impact for magazine readership measurement

Ford J, Perjés T (2009): Measuring the Combined Audience of Multi-Platform Titles
WRRS 2009

Review of a large fusion project in Hungary using a 60,000-strong online panel (measuring online readership) as a donor base and the 16,000 sample national readership survey as a recipient base, preserving the 'gold standard' of both individual currencies.

Galdames P, Balmaceda O, Carranza E (I2005): Estimation methods for media audience duplication
ARF/ESOMAR Worldwide Audience Measurement 2005

***Hussein I** (2006): IPA TouchPoints*
Admap, July 2006, (pg 34-36)

***IPA** (2006): The IPA TouchPoints Initiative – Handbook for Users*

A detailed user guide for TouchPoints 1, including an overview of the TouchPoints integration process by Steve Wilcox (RSMB)

Jephcott J, Bock T (1998): The application and validation of data fusion
Journal of the Market Research Society, 1998, Vol 40/3 (pg 185-205)

An overview of a wide range of fusion methodologies and validation methods, including a summary of the challenges facing survey designers

Licastro G (2009): The Eurisko Media Monitor
ESOMAR Multimedia Measurement 2009

The paper describes a single source approach using mixed mode data collection (media usage, product purchase) and the reaction in the Italian market after the first data release.

Loerke S (2008): Is there Life after Apollo?
The Advertisers, December 2008

The article summarises the current global state of holistic and consumer-centric media measurement.

***Mareck M** (2007): TouchPoints – A step toward a Multimedia Planning Nirvana?
PubliGroupe Forum 2007 (Zurich, Geneva)*

Mareck M (2008): Apollo We Have a Problem
Research World, May 2008 (pg 8-11)

Marks R (2005): Time as the Unifying Metric
ARF/ESOMAR Worldwide Audience Measurement 2005

The author argues that time-budget studies are the way forward for audience measurement in the digital, multi-media age, providing both deeper insight into how consumers use media and a central platform, or hub to fuse individual currencies.

Napoir D, Mattlin J, Ivins B (2005): Calibrated Fusion Evaluation
WRRS 2005

The paper provides a short overview of the integration of MRI and comScore data in the US and the importance of pre-fusion calibration.

O'Brien S (1990): Target group ratings – fusing of BARB and TGI
Admap Feb 1990, pg 38-40

***Robinson L, Beck J, Wilcox S** (2006): Creating the Missing Link – the IPA TouchPoints Initiative
Esomar Worldwide Multimedia Measurement 2006*

A detailed paper reviewing the history and development of TouchPoints, the data collection methodology and the fusion process.

***Robinson L, Turner D** (2007): Delivering the Dream – the IPA TouchPoints Initiative
ESOMAR Worldwide Multimedia Measurement 2007*

A review of TouchPoints1 including a number of examples and case studies and a summary of changes planned for TouchPoints2

***Robinson L** (2009): The IPA TouchPoints Initiative – its Effects on the Market Place and its Future Plans
ESOMAR Multimedia Measurement 2009*

A summary of the learnings from the first two TouchPoints studies and the implications for TouchPoints 3

Scheler H, Wiegand J (1985): Experiments in Fusion in the Official German Media Research
WRRS 1985

The paper describes a series of experiments to develop an alternative to single source audience data for print, radio, and TV consumption. The aim was to build a partnership model, whereby each of the three channels is measured separately and results later 'merged' for intermedia comparison. As a result the technical committee of AG.MA decided that in principle the fusion process as tested worked well and should be introduced into the new model.

Sharot T (2007): The design and precision of data-fusion studies
International Journal of Market Research, Vol 49/4 (2007), pg 449-470

Soong R, de Montigny M (2003): Fusion-on-the-Fly for Multimedia Applications
WRRS 2003

A discussion of various fusion methods with focus on how to optimise fusions for specific target groups 'on the fly' compared to syndicated fusions such as the Nielsen Television Index (NTI) and the MARS (pharmaceutical) surveys. The authors predict that customised fusion-on-the-fly which generates multiple fusion databases is likely to cause confusion as syndicated data fusion provides more consistency for all users.

Soong R, de Montigny M (2003): Does Fusion-on-the-Fly Really Fly?
ARF/ESOMAR Worldwide Audience Measurement 2003

A similar paper to the one given at the Boston Readership Symposium but with additional tabulations.

Soong R, de Montigny M (2004): No Free Lunch in Data Fusion
ESOMAR/ARF Worldwide Audience Measurement 2004

The authors discuss various integration techniques and conclude that there is no single method that works best in all situations and conclude that for any specific problem the best approach is to develop the most appropriate solution.

Soong R (2006): The Data Fusion Bibliography
www.zonalatina.com/datafusion.doc

One of the most comprehensive bibliographies on the topic of data integration with approx 1,000 listed books, articles, and conference papers from 1950 - 2006

Thadani R, Sinha A (1988): A Study on the Validity of Data Fusion: the Indian Experience
WRRS 1988

The paper describes an experiment fusing readership data with television viewing data. Conclusions include that results from fusion are very similar to those of single source data, but tend to work better for higher titles/TV programmes with higher audience levels and that it is difficult to replicate results for marginals.

Video Research Inc (Japan): Audience and Consumer Report
www.videor.co.jp/eng/products/marketing/acr.html

English language summary of this Japanese Media/TGI survey

Walsh P, Zack B (2003): Validating Telmar's Multibasing Technique
WRRS 2003

The paper describes a fold over test using MRI's 2002 Doublebase and compares results using MultiBasing and Weighted Profile Matching. The paper includes a short summary of other data integration techniques

Walsh P (2001): Multibasing – Data Integration without Regression to the Mean
WRRS 2001

The paper argues that traditional fusion methods using respondent level survey data rely too much on demographics, which often account for too little in variance for many product categories. The author proposes the use of clusters of respondents to identify relationships that are based more on respondents' interests than their demographic characteristics.

Wilcox S, Johnson H (1987): Multi-media Reach and Frequency Analysis
WRRS 1997

The paper describes various objectives of mixed media R&F analysis based on examples of mixed print plus TV schedules, using the fused TGI/BARB database.

Wilcox S, O'Sullivan N *(2007): TouchPoints – Integration for Multi-Media Planning*
Vienna Symposium 2007

Summary review of the UK TouchPoints Initiative and its different elements and the actual fusion process

Withers H, Dow H (2007): Canadian Evaluation Fusion versus Single Source
WRRS 2007

An experiment by the Canadian Media Directors' Council tested two fusion techniques and concluded that neither succeeded in fully replicating the original currency relationships.

World Federation of Advertisers (2005): Blueprint for Consumer Centric Holistic Measurement,
WFA 2005, (www.wfablueprint.org)

Appendix 1: Terminology and Abbreviations

BARB (Broadcasters' Audience Research Board)	The *BARB Establishment Survey* measures the characteristics of UK households (demographics, viewing equipment, etc), producing universes for panel control and weighting purposes and providing addresses from which to recruit the panel. BARB ES is a continuous survey of 53,000 CAPI interviews per annum. 5,100 *panel households* have all their television sets, PVRs, DVDRs, VCRs etc. electronically monitored by a meter. Other equipment that is connected to each TV set in the home is also monitored by the BARB meter and determines which one is feeding the TV screen at any point and what it is doing. All 11,300 household residents (and their guests) register/de-register their presence when in a room with a television set on (the BARB definition of television viewing). Each panel member does this by pressing the button allocated to them on each meter handset. After 2am data is automatically downloaded from every panel home, processed and then released as "overnight" minute-by-minute television viewing data at 9.30 each morning. This includes any recorded material played back on the same day as the original transmission, referred to as "VOSDAL" (Viewing-On-Same-Day-As-Live). PVR, DVDR, VCR playback, and catch-up VOD viewing via TV set-top boxes is reported if it takes place within 7 days of the original broadcast. This time-shift viewing is then added to the live data to produce the final, minute-by-minute consolidated audience, which is the 'BARB Gold Standard' used by the industry to trade on. Channels reported by BARB provide time records of the programmes and commercials, which are matched to the minute-by-minute viewing data to produce the BARB official audience viewing estimates for each individual programme and commercial. Establishment survey: Ipsos-MORI; panel operation: TNS; survey design/quality control: RSMB
CAVIAR	See FAME
Channel Planner (TouchPoints)	Previously known as the Integrated Planning Database (IPD). In direct quotes the terminology used by respondents has been used.
FAME (Film Audience Measurement and Evaluation)	An annual online survey interviews 3,000 people over seven years old who have been to the cinema in the last six months. Contractor: TNS
Hub, Hub Survey (TouchPoints)	The Hub Survey (sample 5,000) is based on a self-completion questionnaire combined with a one-week electronic (PDA) diary. The Hub is the first database to be released and consists of the Hub Survey's expansion to the BARB establishment survey combined with TGI data. For the second data release all other currencies are fused onto the Hub as well.
IPD / Integrated Planning Database	See Channel Planner

JICREG (Joint Industry Committee for Regional Media Research)	JICREG provides audience data for the vast majority of local newspapers and their websites. Newspaper readership data is generated by applying readers per copy (RPC) figures to circulation breakdowns at postcode sector level. The RPC figures are generated from readership research. In addition there are currently 8 newspaper groups with websites included on JICREG, accounting for over 70% of the market.
NRS (National Readership Survey)	Thee NRS uses Double Screen CAPI interviews on a total sample of 36,000 adults 15+. From 2006, a proportion of selected persons who have not been interviewed face-to-face are sent a self-completion questionnaire by post. The survey measures over 250 national newspapers and magazines. Data is published quarterly. Contractor: Ipsos-MORI
POSTAR (Poster Audience Research)	As of fall 2010 out-of-home audience measures will be based on GPS technology, which records consumers' travel patterns and exposure to all the major out-of-home platforms (buses, rail, taxis, retail and leisure, all roadside formats, the London Underground). The new investment anticipates the growth of digital out-of-home and the new methodology is designed to incorporate emerging formats as they enter the market. The sample size is approx. 20,000 people. Contractors: MGE Data (GPS technology), Ipsos-MORI
RAJAR (Radio Joint Audience Research)	There are currently about 310 individual stations measured on RAJAR, including 55 BBC stations. The results are published every quarter for all stations. RAJAR interviews approximately 130,000 adults 15+ per year (plus roughly 5,000 children 4-14) over 50 weeks. Respondents are asked to complete a one-week diary for stations they listened to for at least 5 minutes, recorded in quarter hour time blocks. Fieldwork: Ipsos-MORI; sampling and weighting: RSMB
SuperHub	Sometimes the database that resulted from the fusion of TGI onto the expanded Hub Survey is called SuperHub (see also Hub/Hub Survey)
TGI (Target Group Index)	TGI in owned by Kantar and has provided single-source data since 1969 across five decades. Originally focused on the British market, TGI has since expanded to cover more than 60 countries. The National Consumer Survey (NCS) is the US affiliate of Global TGI. In Britain, TGI is a continuous survey of consumer usage habits (products and brands), lifestyles, media exposure and attitudes with an annual sample of 25,000 adults aged 15 plus.
UKOM (UK Online Measurement)	UKOM is a media industry measurement of UK consumers' online usage, specified by UKOM Ltd and delivered by Nielsen, to industry requirements for planning online brand advertising campaigns. Results are based on a nationally representative panel of individuals age 2+, recruited both online and offline. The ongoing panel size will be guaranteed to be at least 31,000 people at home and 4,000 at work. Reporting is monthly. Contractor: Nielsen

Appendix 2a and 2b: Questionnaires

TouchPoints 3: Self- completion questionnaire
www.ipa.co.uk/Content/TouchPoints-Site-TouchPoints3-Self-Completion-Questionnaire

TouchPoints 3: Electronic diary (PDA)
www.ipa.co.uk/Content/TouchPoints-Site-TouchPoints3-eDiary-Questionnaire

Ipsos MORI

TouchPoints Questionnaire

Thank you for your co-operation

Any queries, call our free helpline
0808 238 5492

or e-mail us at
touchpoints@ipsos.com

Contents

Thank you for taking the time to complete this questionnaire. Please answer all the questions by putting an "X" ☒ in the appropriate box. If you make a mistake, just blank out the mistake like this ■ and carry on. If you feel an answer is not applicable please leave the question blank. Please complete in black or blue ink only.

HOW YOU SPEND YOUR TIME

ST1 In the diary that we have asked you to fill out, we cover a number of activities that you may or may not do. In this questionnaire, we would like to look at these activities in a little more detail and find out how frequently in general you do these activities.

So, how often do you do the following?

Please cross (x) one box only per row	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Go to a coffee shop (e.g. Starbucks etc)	☐	☐	☐	☐	☐	☐	☐	☐
Go to a café/sandwich bar	☐	☐	☐	☐	☐	☐	☐	☐
Go to a fast food restaurant	☐	☐	☐	☐	☐	☐	☐	☐
Go to any other type of restaurant	☐	☐	☐	☐	☐	☐	☐	☐
Go to a pub/bar	☐	☐	☐	☐	☐	☐	☐	☐
Go clubbing	☐	☐	☐	☐	☐	☐	☐	☐
Go to the theatre	☐	☐	☐	☐	☐	☐	☐	☐
Go to the opera/ballet	☐	☐	☐	☐	☐	☐	☐	☐
Go to a live music concert	☐	☐	☐	☐	☐	☐	☐	☐
Go to a music festival	☐	☐	☐	☐	☐	☐	☐	☐
Attend a live sports event	☐	☐	☐	☐	☐	☐	☐	☐
Go to a museum (historical/culture)	☐	☐	☐	☐	☐	☐	☐	☐
Go to a museum (nature/science)	☐	☐	☐	☐	☐	☐	☐	☐
Go to an art gallery	☐	☐	☐	☐	☐	☐	☐	☐
Go to a public library	☐	☐	☐	☐	☐	☐	☐	☐
Go to a local park	☐	☐	☐	☐	☐	☐	☐	☐
Visit a theme park	☐	☐	☐	☐	☐	☐	☐	☐
Attend a live exhibition/event (public event or trade show)	☐	☐	☐	☐	☐	☐	☐	☐
Go to a gym or leisure centre	☐	☐	☐	☐	☐	☐	☐	☐
Run or jog	☐	☐	☐	☐	☐	☐	☐	☐
Play sports	☐	☐	☐	☐	☐	☐	☐	☐
Go to evening classes	☐	☐	☐	☐	☐	☐	☐	☐
Go to religious meetings/activities	☐	☐	☐	☐	☐	☐	☐	☐
Do DIY	☐	☐	☐	☐	☐	☐	☐	☐
Have friends round/entertain at home	☐	☐	☐	☐	☐	☐	☐	☐
Use a personal computer / Mac / laptop	☐	☐	☐	☐	☐	☐	☐	☐
Use the internet at home	☐	☐	☐	☐	☐	☐	☐	☐
Use the internet at work	☐	☐	☐	☐	☐	☐	☐	☐
Use the internet when out and about/travelling	☐	☐	☐	☐	☐	☐	☐	☐
Use social networking sites on the internet	☐	☐	☐	☐	☐	☐	☐	☐
Play PC games online	☐	☐	☐	☐	☐	☐	☐	☐
Play PC games offline	☐	☐	☐	☐	☐	☐	☐	☐
Use a games console	☐	☐	☐	☐	☐	☐	☐	☐
Watch pre-recorded DVDs/Blu-ray Discs/videos	☐	☐	☐	☐	☐	☐	☐	☐
Listen to CDs/tapes/records	☐	☐	☐	☐	☐	☐	☐	☐

Please cross (x) one box only per row	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Listen to music on an MP3 player								
Listen to music on a mobile phone								
Listen to music streamed via the internet								
Listen to music stored on a personal computer								
Use a television teletext service								
Use a PVR to record or watch television programmes								
Watch High Definition (HD) television channels								
Watch a televised sports event in a pub or bar								
Drive a car								
Visit a railway station for any purpose								
Make a bet by phone/online or go to a betting office								
Buy alcohol from a shop/off-licence								
Buy alcohol from a pub								
Visit/shop at large supermarket that has its own car park								
Visit/shop at any other supermarket								
Visit/shop at any department store								
Visit/shop at a local 'corner' shop or newsagent								
Visit/shop in an 'in-town' shopping mall/centre								
Visit/shop in an 'out of town' shopping mall/centre								
Visit/shop in a local high street								
Visit shopping complexes at airports								
Visit a motorway service station as a driver or passenger to buy petrol, food, etc.								
Visit any other type of garage/ service station either as a driver, passenger or on foot, to buy petrol, food etc.								

TELEVISION WATCHING

TV1a Have you watched television in the past 12 months?

Yes ☐ **CONTINUE TO TV1b**

No ☐ **SKIP TO RADIO SECTION (RD1a, PAGE 10)**

TV1b Television programmes can be watched on a variety of receivers nowadays. Can you tell me how often you watch **television** on the following **types of receivers**?

Please cross (x) one box only per row	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
A television set							
A desktop PC/Mac							
A laptop /Mac							
A mobile phone							
A portable player e.g. Sony PSP							
A video iPod							
Other							

TV2a Which types of television programmes do you usually watch?

TV2b And which are your favourite types of programmes?

Please cross (x) all that apply	TV2a Watch	TV2b Favourites		TV2a Watch	TV2b Favourites
Drama: One off plays	☐	☐	History	☐	☐
Drama: Soaps	☐	☐	Wildlife	☐	☐
Drama: Series / Serials	☐	☐	Hobbies / Leisure	☐	☐
Cinema Films on TV	☐	☐	Religious	☐	☐
Made for TV Films	☐	☐	Children's	☐	☐
Sci-Fi / Fantasy	☐	☐	Education	☐	☐
Sport: Football	☐	☐	UK Comedies	☐	☐
Sport: Other	☐	☐	US Comedies	☐	☐
News / Weather	☐	☐	Game shows / Quizzes	☐	☐
Current Affairs	☐	☐	Chat Shows	☐	☐
Documentaries	☐	☐	Reality Television with the General Public	☐	☐
Party Political	☐	☐	Reality Television with Celebrity Contestants	☐	☐
Music	☐	☐	Other Entertainment	☐	☐
Arts	☐	☐	Other	☐	☐
Science	☐	☐			

TV3a Which of the following TV channels can you **receive**?

TV3b Which have you watched in the **past 7 days**?

TV3c Which have you watched in the **past 4 weeks**?

TV3d Which are your **favourites**?

TV3e Finally, please indicate if you have visited the television channel's website(s) in the **past 4 weeks?**

Please include +1 channels with the original e.g. ITV2+1, E4+1)

	Please cross (x) all that apply	TV3a Can receive	TV3b Watched in past 7 days	TV3c Watched in past 4 weeks	TV3d One of my favourites	TV3e Visited channel website in past 4 weeks
TERRESTRIAL CHANNELS	BBC One	☐	☐	☐	☐	☐
	BBC Two	☐	☐	☐	☐	☐
	ITV1	☐	☐	☐	☐	☐
	Channel 4 / S4C	☐	☐	☐	☐	☐
	five	☐	☐	☐	☐	☐
DIGITAL CHANNELS	BBC Three	☐	☐	☐	☐	☐
Entertainment	BBC Four	☐	☐	☐	☐	☐
	ITV2	☐	☐	☐	☐	☐
	ITV3	☐	☐	☐	☐	☐
	ITV4	☐	☐	☐	☐	☐
	Sky One	☐	☐	☐	☐	☐
	Sky Two	☐	☐	☐	☐	☐
	Sky Three	☐	☐	☐	☐	☐
	Alibi	☐	☐	☐	☐	☐
	Blighty	☐	☐	☐	☐	☐
	Bravo	☐	☐	☐	☐	☐
	Bravo2	☐	☐	☐	☐	☐
	Challenge	☐	☐	☐	☐	☐

Please cross (x) all that apply		Can receive	Watched in past 7 days	Watched in past 4 weeks	One of my favourites	Visited channel website in past 4 weeks
	Dave					
	DMAX					
	E!					
	E4					
	Eden					
	Five USA					
	fiver					
	FX					
	G.O.L.D					
	Good Food					
	Hallmark					
	Home					
	Life					
	Living					
	Living 2					
	More 4					
	Paramount Comedy					
	Really					
	Sci Fi					
	Trouble					
	Virgin 1					
	Watch					
	Yesterday					
	Any other entertainment channel					
FILM	Film 4					
	Movies 24					
	Movies 4 Men					
	Sky Box Office					
	Sky Movies					
	TCM/TCM 2					
	Zone Movies					
	Any other film channel					
SPORTS	Eurosport					
	Sky Sports 1					
	Sky Sports 2					
	Sky Sports 3					
	Sky Sports News					
	Sky Sports Xtra					
	Any other sports channel					
NEWS	BBC News					
	CNN					
	EuroNews					
	Sky News					
	Any other news channel					

Please cross (x) all that apply		Can receive	Watched in past 7 days	Watched in past 4 weeks	One of my favourites	Visited channel website in past 4 weeks
MUSIC	4 Music	☐	☐	☐	☐	☐
	Box	☐	☐	☐	☐	☐
	Kerrang!	☐	☐	☐	☐	☐
	Kiss	☐	☐	☐	☐	☐
	Smash Hits	☐	☐	☐	☐	☐
	MTV	☐	☐	☐	☐	☐
	VH1	☐	☐	☐	☐	☐
	Any other music channel	☐	☐	☐	☐	☐
OTHER CHANNELS	Any **documentary** channel	☐	☐	☐	☐	☐
	Any **lifestyle** channel	☐	☐	☐	☐	☐
	Any **travel** channel	☐	☐	☐	☐	☐
	Any **radio** station	☐	☐	☐	☐	☐
	Any **specialist** station	☐	☐	☐	☐	☐
	Any **children's** channel	☐	☐	☐	☐	☐
	Any **religious** channel	☐	☐	☐	☐	☐
	Any **shopping** channel	☐	☐	☐	☐	☐
	Any **branded** channel (e.g. Audi TV)	☐	☐	☐	☐	☐
	Any **gaming** channel	☐	☐	☐	☐	☐
	Any **foreign/ language/international** channel	☐	☐	☐	☐	☐
	Any **adult** channel	☐	☐	☐	☐	☐
	Any other channel	☐	☐	☐	☐	☐

TV4a Thinking now about the TV you watch. What are your main reasons for watching TV?

TV4b And what **other reasons** are also important?

Please cross (x) all that apply	TV4a Main Reasons	TV4b Other Reasons		TV4a Main Reasons	TV4b Other Reasons
For entertainment	☐	☐	For news and current affairs	☐	☐
To relax / escapism	☐	☐	For practical advice	☐	☐
Force of habit	☐	☐	For sports news and commentary	☐	☐
To spend time with friends / family	☐	☐	For education/information	☐	☐
To give me something to talk about	☐	☐	To keep me company	☐	☐
To stimulate my imagination	☐	☐	As background	☐	☐
To treat/reward myself	☐	☐	To make me feel better	☐	☐
To keep up to date	☐	☐	Other	☐	☐

TV5 Here are some statements people have made about **television**. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
Sometimes I watch the television regardless of what is on	☐	☐	☐	☐	☐	☐
It is not right for companies or brands to try to influence the content covered or the views expressed in TV programmes	☐	☐	☐	☐	☐	☐
I change channels when the adverts come on	☐	☐	☐	☐	☐	☐
I normally fast forward through the advertising break when I am watching a recording of a TV programme	☐	☐	☐	☐	☐	☐
If it meant that I did not have to pay a licence fee I would be happy for there to be advertisements on the BBC	☐	☐	☐	☐	☐	☐
PVR technology like Sky+ has completely changed the way I watch television	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I trust the advertising I see on the television	☐	☐	☐	☐	☐	☐
I tend to plan my evenings around what is on the television	☐	☐	☐	☐	☐	☐
I think that it is right to ban some types of advertising from children's television	☐	☐	☐	☐	☐	☐
The BBC's broadcasting standards would fall if funded partly or wholly by advertising	☐	☐	☐	☐	☐	☐
There are too many 'reality' programmes on television these days	☐	☐	☐	☐	☐	☐
When watching TV with other people I am usually the person with the remote control	☐	☐	☐	☐	☐	☐
Without sponsorship on television, many of the programmes that I like wouldn't be made	☐	☐	☐	☐	☐	☐
I know a programme will be good quality if it is on the BBC	☐	☐	☐	☐	☐	☐
BBC television, radio and internet services are not worth the licence fee	☐	☐	☐	☐	☐	☐
TV adverts often lead me to search for a product or service online	☐	☐	☐	☐	☐	☐
I like to watch my favourite television programmes with my friends and family	☐	☐	☐	☐	☐	☐
I find television advertising informative	☐	☐	☐	☐	☐	☐

TV6 It is now possible to watch television programmes using a range of 'on demand' or catch-up services. An on-demand or catch up service allows the users to access television programmes and films when they want to and/or access TV programmes or films that have previously been shown on television. These services are available via both your television set and the internet. Have you ever accessed television programmes using 'on demand' or catch-up services on <u>your television set?</u>

Yes ☐ **CONTINUE TO TV7** No ☐ **SKIP TO TV9 (PAGE 9)**

TV7 How often do you use each of the following <u>on television</u> (NOT on the internet) to watch 'on demand' or catch up television or films?

Please cross (x) one box only per row	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Sky Anytime On Demand Service	☐	☐	☐	☐	☐	☐	☐	☐
Virgin On Demand service (incl. Virgin Central, TV Choice on Demand)	☐	☐	☐	☐	☐	☐	☐	☐
Top Up TV Anytime On Demand service	☐	☐	☐	☐	☐	☐	☐	☐
Tiscali On Demand service	☐	☐	☐	☐	☐	☐	☐	☐
BT Vision On Demand service	☐	☐	☐	☐	☐	☐	☐	☐
Other On Demand service	☐	☐	☐	☐	☐	☐	☐	☐

TV8 And how often do you watch each of the following on your 'on demand' or catch up television service (on your TV, NOT on the internet)?

Please cross (x) one box only per row	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Programmes from the BBC / iPlayer	☐	☐	☐	☐	☐	☐	☐	☐
Programmes from ITV	☐	☐	☐	☐	☐	☐	☐	☐
Programmes from Channel 4 / 4oD	☐	☐	☐	☐	☐	☐	☐	☐
Programmes from Five / Demand Five	☐	☐	☐	☐	☐	☐	☐	☐
Programmes from Sky	☐	☐	☐	☐	☐	☐	☐	☐
Films from any channel	☐	☐	☐	☐	☐	☐	☐	☐
Programmes from other TV channels	☐	☐	☐	☐	☐	☐	☐	☐

TV9 Have you ever watched or downloaded television programmes via the internet, including 'on demand' or catch-up services? (An 'on-demand' or catch up service allows the users to access television programmes and films when they want to and/or access TV programmes or films that have previously been shown on television. These services are available via both your television set and the internet.)

Yes ☐ **CONTINUE TO TV10**

No ☐ **SKIP TO TV14 (PAGE 10)**

TV10 When do you usually watch television programmes via the internet? ***Please cross (x) all that apply***

At the same time they are broadcast (i.e. live streaming) ☐

At a later time than they were broadcast using video catch up or 'on demand' services such as BBC iPlayer, etc ☐

At a later time than they were broadcast via a download or a podcast ☐

TV11 How often do you use each of the following via the internet to watch or download television programmes? ***Please cross (x) one box only per row***

	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
BBC iPlayer	☐	☐	☐	☐	☐	☐	☐	☐
ITV.com Catch up	☐	☐	☐	☐	☐	☐	☐	☐
Channel 4 on Demand (4oD)	☐	☐	☐	☐	☐	☐	☐	☐
Channel4.com/watch_online	☐	☐	☐	☐	☐	☐	☐	☐
Demand Five	☐	☐	☐	☐	☐	☐	☐	☐
Sky Player	☐	☐	☐	☐	☐	☐	☐	☐
YouTube	☐	☐	☐	☐	☐	☐	☐	☐
Babelgum	☐	☐	☐	☐	☐	☐	☐	☐
Joost	☐	☐	☐	☐	☐	☐	☐	☐
TIOTI	☐	☐	☐	☐	☐	☐	☐	☐
Other websites	☐	☐	☐	☐	☐	☐	☐	☐

TV12 What percentage of your total viewing of television programmes (including films on television) is done on the internet via your computer or laptop? ***Please cross (x) one box only***

None ☐ Less than 10% ☐ 10%-24% ☐ 25%-49% ☐ 50%-74% ☐ 75%-100% ☐

TV13a What types of programmes have you watched **live** via the internet?

TV13b And what types of programmes have you watched **later** via the internet (i.e. on a catch up service)?

Please cross (x) all that apply

	TV13a Watched Live	TV13b Watched Later
Drama: One off plays	☐	☐
Drama: Soaps	☐	☐
Drama: Series / Serials	☐	☐
Cinema Films on TV	☐	☐
Made for TV Films	☐	☐
Sci-Fi / Fantasy	☐	☐
Sport: Football	☐	☐
Sport: Other	☐	☐
News / Weather	☐	☐
Current Affairs	☐	☐
Documentaries	☐	☐
History	☐	☐
Wildlife	☐	☐
Hobbies / Leisure	☐	☐
Religious	☐	☐
Children's	☐	☐
Education	☐	☐
UK Comedies	☐	☐
US Comedies	☐	☐
Game shows / Quizzes	☐	☐
Chat Shows	☐	☐
Reality Television with the General Public	☐	☐

Please cross (x) all that apply	**TV13a Watched Live**	**TV13b Watched Later**		**TV13a Watched Live**	**TV13b Watched Later**
Party Political	☐	☐	Reality Television with Celebrity Contestants	☐	☐
Music	☐	☐	Other Entertainment	☐	☐
Arts	☐	☐	Other	☐	☐
Science	☐	☐			

TV14 Here are some more statements people have made about television. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	**Definitely agree**	**Tend to agree**	**Neither agree nor disagree**	**Tend to disagree**	**Definitely disagree**	**Don't know/Not applicable**
I prefer to watch live TV via the internet	☐	☐	☐	☐	☐	☐
Watching catch up TV online using sites like BBC iPlayer, has transformed my TV viewing	☐	☐	☐	☐	☐	☐
I use 'on demand' services to catch up on programmes I have missed	☐	☐	☐	☐	☐	☐
I am happy to watch adverts before an 'on demand' programme if it means that the programme is free to watch	☐	☐	☐	☐	☐	☐
When I watch 'on demand' TV I would prefer to have adverts appear at the start of the programme rather than in the middle	☐	☐	☐	☐	☐	☐

RADIO

RD1a Have you listened to the radio in the past 12 months?

Yes ☐ **CONTINUE TO RD1b**

No ☐ **SKIP TO NATIONAL NEWSPAPER SECTION (NR1a, PAGE 14)**

RD1b How do you listen to the radio?

Please cross (x) all that apply	**Often listen**	**Occasionally listen**		**Often listen**	**Occasionally listen**
Through a stereo / hi-fi / sound system	☐	☐	On an iPod/MP3 player	☐	☐
On a car radio	☐	☐	On a mobile phone	☐	☐
On a clock radio	☐	☐	On digital television	☐	☐
On a workplace radio	☐	☐	Via live streaming over the internet	☐	☐
On a personal stereo	☐	☐	Via a 7 day replay/catch up service	☐	☐
On an ordinary FM/AM radio	☐	☐	Via a downloaded podcast	☐	☐
On a portable radio	☐	☐	Other	☐	☐
On a DAB digital radio	☐	☐			

RD2a Where do you do **most** of your radio listening?

RD2b Where **else** do you listen to the radio?

	Most listening	**Other listening**		**Most listening**	**Other listening**
At home in the living room	☐	☐	On a bus or tram	☐	☐
At home in the kitchen	☐	☐	Whilst walking	☐	☐
At home in the bedroom	☐	☐	On a train	☐	☐
At home in the bathroom	☐	☐	At work	☐	☐
At home in the garden	☐	☐	When I am exercising / at the gym	☐	☐
At home elsewhere	☐	☐	Other	☐	☐
In the car/van	☐	☐			

RD3a What types of music do you tend to listen to **on the radio**?

RD3b And which types are your favourites?

Please cross (x) all that apply

	RD3a Listen to	RD3b Favourites		RD3a Listen to	RD3b Favourites
Alternative	☐	☐	Hip Hop	☐	☐
Classical/Opera	☐	☐	Indie	☐	☐
Country	☐	☐	Jazz/Blues	☐	☐
Dance	☐	☐	Pop (top 40)	☐	☐
Easy Listening	☐	☐	R&B / Urban	☐	☐
Soul	☐	☐	Reggae	☐	☐
Ethnic / World	☐	☐	Rock	☐	☐
Gold (60's, 70's, 80's Pop)	☐	☐	Other music	☐	☐
Heavy metal	☐	☐	Rarely / never listen to music on the radio	☐	

RD4a What types of speech based programmes do you tend to listen to on the radio?

RD4b And which types are your favourites?

Please cross (x) all that apply

	RD4a Listen to	RD4b Favourites		RD4a Listen to	RD4b Favourites
News and current affairs	☐	☐	Celebrity chat	☐	☐
Documentaries/History	☐	☐	Football	☐	☐
Arts	☐	☐	Other sports	☐	☐
Hobbies	☐	☐	Comedy	☐	☐
Education	☐	☐	Drama	☐	☐
Chat / Talk shows	☐	☐	Children's	☐	☐
Quizzes / Game shows	☐	☐	Other speech based programmes	☐	☐
Real life stories	☐	☐	Rarely/Never listen to speech based radio programmes	☐	

RD5a When did you last listen to any of the following radio stations? ***Please cross (x) one box for each radio station***

RD5b And please select your favourite station(s) ***Please cross (x) all that apply***

RD5c Finally, please indicate if you visited the radio station's website(s) in the past 4 weeks. ***Please cross (x) all that apply***

	RD5a					RD5b	RD5c
BBC Stations	**In the past 24 hours**	**In the past 7 days**	**In the past 4 weeks**	**In the past 12 months**	**Longer ago or never listened to**	**One of my favourite stations**	**Visited station website in the past 4 weeks**
BBC Radio 1 97-99 FM	☐	☐	☐	☐	☐	☐	☐
BBC Radio 2	☐	☐	☐	☐	☐	☐	☐
BBC Radio 3	☐	☐	☐	☐	☐	☐	☐
BBC Radio 4	☐	☐	☐	☐	☐	☐	☐
BBC Radio 5 LIVE	☐	☐	☐	☐	☐	☐	☐
BBC Radio 5 LIVE Sports Extra	☐	☐	☐	☐	☐	☐	☐
BBC 6 Music	☐	☐	☐	☐	☐	☐	☐
1xtra from the BBC	☐	☐	☐	☐	☐	☐	☐
BBC Radio 7	☐	☐	☐	☐	☐	☐	☐
BBC World Service	☐	☐	☐	☐	☐	☐	☐
BBC Asian Network	☐	☐	☐	☐	☐	☐	☐
Any BBC local/regional station	☐	☐	☐	☐	☐	☐	☐

	In the past 24 hours	In the past 7 days	In the past 4 weeks	In the past 12 months	Longer ago or never listened to	One of my favourite stations	Visited station website in the past 4 weeks
National Commercial Stations							
Absolute Radio	☐	☐	☐	☐	☐	☐	☐
Classic FM	☐	☐	☐	☐	☐	☐	☐
The Hits	☐	☐	☐	☐	☐	☐	☐
Planet Rock	☐	☐	☐	☐	☐	☐	☐
talkSPORT	☐	☐	☐	☐	☐	☐	☐
Regional Commercial Stations							
95.8 Capital FM	☐	☐	☐	☐	☐	☐	☐
LBC 97.3	☐	☐	☐	☐	☐	☐	☐
Radio Clyde	☐	☐	☐	☐	☐	☐	☐
Radio Forth	☐	☐	☐	☐	☐	☐	☐
Key 103 (Manchester)	☐	☐	☐	☐	☐	☐	☐
Radio City 96.7	☐	☐	☐	☐	☐	☐	☐
96.3 Radio Aire	☐	☐	☐	☐	☐	☐	☐
96.4 BRMB	☐	☐	☐	☐	☐	☐	☐
Lincs FM 102.2	☐	☐	☐	☐	☐	☐	☐
Any Capital Gold station	☐	☐	☐	☐	☐	☐	☐
Any Century FM station	☐	☐	☐	☐	☐	☐	☐
Any Choice station	☐	☐	☐	☐	☐	☐	☐
Any Galaxy station	☐	☐	☐	☐	☐	☐	☐
Any Heart station	☐	☐	☐	☐	☐	☐	☐
Any Kerrang station	☐	☐	☐	☐	☐	☐	☐
Any Kiss station	☐	☐	☐	☐	☐	☐	☐
Any Magic station	☐	☐	☐	☐	☐	☐	☐
Any Real station	☐	☐	☐	☐	☐	☐	☐
Any Smooth station	☐	☐	☐	☐	☐	☐	☐
Any XFM station	☐	☐	☐	☐	☐	☐	☐
Any other local/regional commercial station	☐	☐	☐	☐	☐	☐	☐

RD6a How often do you listen to live radio programmes via the internet at the same time they are broadcast (e.g. live streaming)?

RD6b And, how often do you listen to radio programmes via the internet at a later or different time than the original broadcast (e.g. using the 'listen again', catch up option on some radio websites or podcasting etc)?

Please cross (x) one box in each row	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Listen to live radio programmes via the internet	☐	☐	☐	☐	☐	☐	☐	☐
Listen at a later or different time than original broadcast	☐	☐	☐	☐	☐	☐	☐	☐

RD7a Thinking now about listening to the radio. What are your main reasons for listening to the radio?

RD7b And what other reasons are also important?

Please cross (x) all that apply

	RD7a Main reasons	RD7b Other reasons
For entertainment	☐	☐
To relax / escapism	☐	☐
Force of habit	☐	☐
To give me something to talk about	☐	☐
To stimulate my imagination	☐	☐
To treat / reward myself	☐	☐
To keep up to date	☐	☐
For news and current affairs	☐	☐
For sports news and commentary	☐	☐
For practical advice	☐	☐
For education / information	☐	☐
To keep me company	☐	☐
As background	☐	☐
To help me wake up in the morning	☐	☐
To make me feel better	☐	☐
To discover new music	☐	☐
Other	☐	☐

RD8 Here are some statements people have made about **radio**. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I often have the radio on in the background	☐	☐	☐	☐	☐	☐
I enjoy listening to competitions on the radio	☐	☐	☐	☐	☐	☐
I prefer to listen to BBC radio as it is advertising free	☐	☐	☐	☐	☐	☐
It annoys me when promotions and advertising interrupts the music on the radio	☐	☐	☐	☐	☐	☐
I always listen to the radio when I am in the car	☐	☐	☐	☐	☐	☐
I trust the advertising I hear on the radio	☐	☐	☐	☐	☐	☐
I listen to less live radio these days	☐	☐	☐	☐	☐	☐
Radio ads often lead me to search for products and services on the internet	☐	☐	☐	☐	☐	☐
I like to catch up with radio programmes I have missed using the internet	☐	☐	☐	☐	☐	☐
I find radio advertising informative	☐	☐	☐	☐	☐	☐

NATIONAL NEWSPAPER READERSHIP

NR1a How often do you use, read or look at **each** of the following national **newspapers**?

- **Almost always** (at least 3 out of 4 issues), **Quite often** (at least 1 out of 4 issues), **Occasionally** (less than 1 out of 4 issues). ***Please cross (x) one box for each newspaper***

NR1b Which did you look at yesterday?

NR1c Which have you looked at in the past 7 days?

NR1d Which are your favourites?

Please cross (x) all that apply in each column

		NR1a How Often				NR1b	NR1c	NR1d
		Almost always	Quite often	Occasionally	Not read in past 12 months	Looked at yesterday	Looked at in the past 7 days	One of my favourites
National Daily Titles	Daily Express	☐	☐	☐	☐	☐	☐	☐
	Daily Mail	☐	☐	☐	☐	☐	☐	☐
	Metro (free)	☐	☐	☐	☐	☐	☐	☐
	Daily Mirror/ Daily Record	☐	☐	☐	☐	☐	☐	☐
	Daily Sport	☐	☐	☐	☐	☐	☐	☐
	Daily Star	☐	☐	☐	☐	☐	☐	☐
	The Sun	☐	☐	☐	☐	☐	☐	☐
	The Daily Telegraph	☐	☐	☐	☐	☐	☐	☐
	Financial Times	☐	☐	☐	☐	☐	☐	☐
	The Guardian	☐	☐	☐	☐	☐	☐	☐
	The Independent	☐	☐	☐	☐	☐	☐	☐
	The Times	☐	☐	☐	☐	☐	☐	☐
National Sunday Titles	The Mail on Sunday	☐	☐	☐	☐	☐	☐	☐
	Sunday Express	☐	☐	☐	☐	☐	☐	☐
	Daily Star Sunday	☐	☐	☐	☐	☐	☐	☐
	News of the World	☐	☐	☐	☐	☐	☐	☐
	The People	☐	☐	☐	☐	☐	☐	☐
	Sunday Mirror	☐	☐	☐	☐	☐	☐	☐
	Sunday Sport	☐	☐	☐	☐	☐	☐	☐
	The Independent on Sunday	☐	☐	☐	☐	☐	☐	☐
	The Observer	☐	☐	☐	☐	☐	☐	☐
	The Sunday Telegraph	☐	☐	☐	☐	☐	☐	☐
	The Sunday Times	☐	☐	☐	☐	☐	☐	☐

Thinking now about the different types of articles and features that appear in **national newspapers.**

NR2a Which articles and features do you read /look at regularly?

NR2b And which are your favourite types of articles or features?

Please cross (x) all that apply	NR2a Read regularly	NR2b One of my favourites		NR2a Read regularly	NR2b One of my favourites
Local news	☐	☐	Jobs / appointments	☐	☐
UK/British news	☐	☐	Education	☐	☐
European news	☐	☐	The environment	☐	☐
Other foreign news	☐	☐	Home and garden	☐	☐
Relationship / problem page	☐	☐	Media / marketing / advertising	☐	☐
Sport	☐	☐	Computing / technology / science	☐	☐
Cars & motoring	☐	☐	Medical / health / fitness	☐	☐

Please cross (x) all that apply

	NR2a Read regularly	NR2b One of my favourites		NR2a Read regularly	NR2b One of my favourites
Food and drink	☐	☐	Women's pages	☐	☐
Art / books / theatre	☐	☐	Classified advertising / small ads	☐	☐
Music	☐	☐	Puzzles / crosswords	☐	☐
Film and video	☐	☐	Weekly entertainment guide	☐	☐
TV programme details	☐	☐	Fashion / style	☐	☐
Personal finance / investment	☐	☐	Celebrity / gossip	☐	☐
Business / company news	☐	☐	Property	☐	☐
Travel and holidays	☐	☐	Other	☐	☐

NR3a Thinking now about the **national** newspapers you read. What are your **main reasons** for reading **national** newspapers?

NR3b And what **other reasons** are also important?

Please cross (x) all that apply

	NR3a Main reasons	NR3b Other reasons		NR3a Main reasons	NR3b Other reasons
For entertainment	☐	☐	For education / information	☐	☐
To relax / escapism	☐	☐	For comment / analysis	☐	☐
To give me something to talk about	☐	☐	For business information / work	☐	☐
To stimulate my imagination	☐	☐	For research	☐	☐
To treat / reward myself	☐	☐	For celebrity news and gossip	☐	☐
To keep up to date	☐	☐	To help form my opinions	☐	☐
For news and current affairs	☐	☐	For inspiration of things to do	☐	☐
For job vacancies and career advice	☐	☐	To make me feel better	☐	☐
For practical advice	☐	☐	Other	☐	☐

NR4 Many national newspapers have their own websites. How often do you visit the following newspaper websites?

Please cross (x) one box for each website	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
www.dailyexpress.co.uk ***(Daily Express)***	☐	☐	☐	☐	☐	☐	☐	☐
www.dailymail.co.uk ***(Daily Mail)***	☐	☐	☐	☐	☐	☐	☐	☐
www.dailyrecord.co.uk ***(The Daily Record)***	☐	☐	☐	☐	☐	☐	☐	☐
www.dailystar.co.uk ***(The Daily Star)***	☐	☐	☐	☐	☐	☐	☐	☐
www.ft.com ***(Financial Times)***	☐	☐	☐	☐	☐	☐	☐	☐
www.guardian.co.uk ***(The Guardian)***	☐	☐	☐	☐	☐	☐	☐	☐
www.independent.co.uk ***(Independent)***	☐	☐	☐	☐	☐	☐	☐	☐
www.metro.co.uk ***(Metro)***	☐	☐	☐	☐	☐	☐	☐	☐
www.mirror.co.uk ***(The Mirror)***	☐	☐	☐	☐	☐	☐	☐	☐
www.telegraph.co.uk ***(Telegraph newspapers)***	☐	☐	☐	☐	☐	☐	☐	☐
www.timesonline.co.uk ***(Times newspapers)***	☐	☐	☐	☐	☐	☐	☐	☐
www.thesun.co.uk ***(The Sun)***	☐	☐	☐	☐	☐	☐	☐	☐
www.mailonsunday.co.uk ***(The Mail on Sunday)***	☐	☐	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each website	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
www.newsoftheworld.co.uk *(The News of the World)*	☐	☐	☐	☐	☐	☐	☐	☐
www.observer.co.uk *(The Observer)*	☐	☐	☐	☐	☐	☐	☐	☐
www.people.co.uk *(The People)*	☐	☐	☐	☐	☐	☐	☐	☐
www.sundaymirror.co.uk *(Sunday Mirror)*	☐	☐	☐	☐	☐	☐	☐	☐
Any other national newspaper website	☐	☐	☐	☐	☐	☐	☐	☐

NR5 How often do you use / receive the following services from **national newspapers**?

Please cross (x) one box for each service	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Download podcasts	☐	☐	☐	☐	☐	☐	☐	☐
Download other content	☐	☐	☐	☐	☐	☐	☐	☐
Receive e-mail alerts	☐	☐	☐	☐	☐	☐	☐	☐
Receive e-mail bulletins	☐	☐	☐	☐	☐	☐	☐	☐
Receive desktop alerts	☐	☐	☐	☐	☐	☐	☐	☐
View RSS feeds	☐	☐	☐	☐	☐	☐	☐	☐
Watch video clips	☐	☐	☐	☐	☐	☐	☐	☐

NR6 Here are some statements people have made about **national newspapers**. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
Newspaper supplements are really worth having	☐	☐	☐	☐	☐	☐
I often buy a newspaper I wouldn't normally buy because of a free CD or DVD	☐	☐	☐	☐	☐	☐
I look forward to the puzzles/ crosswords in my paper	☐	☐	☐	☐	☐	☐
I sometimes save sections of my newspaper to read later	☐	☐	☐	☐	☐	☐
I would not change the newspaper I read	☐	☐	☐	☐	☐	☐
I hardly ever read or look at loose inserts in newspapers	☐	☐	☐	☐	☐	☐
I prefer to get my national news online these days	☐	☐	☐	☐	☐	☐
I trust the advertising I see in my national newspaper	☐	☐	☐	☐	☐	☐
I often enter competitions in newspapers	☐	☐	☐	☐	☐	☐
I do not buy a daily newspaper if I can pick up a free one	☐	☐	☐	☐	☐	☐
I find newspaper ads that have web addresses, phone numbers or SMS text addresses useful	☐	☐	☐	☐	☐	☐
I usually find ads in national newspapers informative	☐	☐	☐	☐	☐	☐
I often do not read all of the separate sections in newspapers	☐	☐	☐	☐	☐	☐
I like the convenience of getting my newspaper electronically	☐	☐	☐	☐	☐	☐
Newspapers are too expensive nowadays	☐	☐	☐	☐	☐	☐
I should not have to pay for a subscription to view newspaper content online	☐	☐	☐	☐	☐	☐
I look out for ads featuring special offers and price information in my papers	☐	☐	☐	☐	☐	☐
National newspaper ads often lead to me searching for products and services on the internet	☐	☐	☐	☐	☐	☐

REGIONAL NEWSPAPER READERSHIP

NR7a How often do you use, read or look at **each** of the following regional **newspapers**?

- **Almost always** (at least 3 out of 4 issues), **Quite often** (at least 1 out of 4 issues), **Occasionally** (less than 1 out of 4 issues). ***Please cross (x) one box for each newspaper***

NR7b Which did you look at yesterday?

NR7c Which have you looked at in the past 7 days?

NR7d Which are your favourites?

NR7e Finally, please indicate if you have visited the newspapers website(s) in the past 4 weeks?

Please cross (x) all that apply in each column

		NR7a How Often				NR7b	NR7c	NR7d	NR7e
Regional Daily Newspapers		Almost always	Quite often	Occasion-ally	Not read in past 12 months	Looked at yesterday	Looked at in the past 7 days	One of my favourites	Visited website in past 4 weeks
Scotland	Aberdeen Press and Journal	☐	☐	☐	☐	☐	☐	☐	☐
	Dundee Courier and Advertiser	☐	☐	☐	☐	☐	☐	☐	☐
	Edinburgh Evening News	☐	☐	☐	☐	☐	☐	☐	☐
	Glasgow Evening Times	☐	☐	☐	☐	☐	☐	☐	☐
	The Herald	☐	☐	☐	☐	☐	☐	☐	☐
	The Scotsman	☐	☐	☐	☐	☐	☐	☐	☐
The North	Hull Daily Mail	☐	☐	☐	☐	☐	☐	☐	☐
	Lancashire Evening Post	☐	☐	☐	☐	☐	☐	☐	☐
	Liverpool Daily Post	☐	☐	☐	☐	☐	☐	☐	☐
	Liverpool Echo	☐	☐	☐	☐	☐	☐	☐	☐
	Manchester Evening News	☐	☐	☐	☐	☐	☐	☐	☐
	Manchester Metro News	☐	☐	☐	☐	☐	☐	☐	☐
	Newcastle Evening Chronicle	☐	☐	☐	☐	☐	☐	☐	☐
	Oldham Evening Chronicle	☐	☐	☐	☐	☐	☐	☐	☐
	Sheffield Star	☐	☐	☐	☐	☐	☐	☐	☐
	Yorkshire Post	☐	☐	☐	☐	☐	☐	☐	☐
	Yorkshire Evening Post	☐	☐	☐	☐	☐	☐	☐	☐
The Midlands	Birmingham Mail	☐	☐	☐	☐	☐	☐	☐	☐
	Birmingham Post	☐	☐	☐	☐	☐	☐	☐	☐
	Coventry Telegraph	☐	☐	☐	☐	☐	☐	☐	☐
	Derby Evening Telegraph	☐	☐	☐	☐	☐	☐	☐	☐
	(W.Mids) Express and Star	☐	☐	☐	☐	☐	☐	☐	☐
	Leicester Mercury	☐	☐	☐	☐	☐	☐	☐	☐
	Nottingham Evening Post	☐	☐	☐	☐	☐	☐	☐	☐
	Shropshire Star	☐	☐	☐	☐	☐	☐	☐	☐
	(Stoke) The Sentinel	☐	☐	☐	☐	☐	☐	☐	☐
The South and South East	The Argus Brighton	☐	☐	☐	☐	☐	☐	☐	☐
	City A.M. (free)	☐	☐	☐	☐	☐	☐	☐	☐
	London Evening Standard	☐	☐	☐	☐	☐	☐	☐	☐
	London Lite (free)	☐	☐	☐	☐	☐	☐	☐	☐
	thelondonpaper (free)	☐	☐	☐	☐	☐	☐	☐	☐
	(Southampton) Southern Daily Echo	☐	☐	☐	☐	☐	☐	☐	☐

Regional Daily Newspapers		Almost always	Quite often	Occasion-ally	Not read in past 12 months	Looked at yesterday	Looked at in the past 7 days	One of my favourites	Visited website in past 4 weeks
East Anglia	East Anglian Daily Times								
	(Norfolk) Eastern Daily Press								
Wales and The West	Bristol Evening Post								
	Exeter Express and Echo								
	South Wales Argus								
	South Wales Echo								
	South Wales Evening Post								
	Western Daily Press								
	Western Mail (Wales)								
Scottish Sunday Titles	Sunday Herald								
	Sunday Mail								
	The Sunday Post								
	Scotland on Sunday								
Other Regional Papers	Any other regional daily (paid for)								
	Any other regional daily (free)								
	Any other regional Sunday paper (paid for)								
	Any other regional Sunday paper (free)								
Weekly Local Papers	Any local weekly newspaper (paid for)								
	Any local weekly newspaper (free)								

NR8a Thinking now about the **regional** newspapers you read. What are your **main reasons** for reading regional newspapers?

NR8b And what **other reasons** are also important?

Please cross (x) all that apply	NR8a Main reasons	NR8b Other reasons		NR8a Main reasons	NR8b Other reasons
To keep up to date with local news			To look at the classified ads		
To feel part of my local community			For practical advice		
For entertainment			To look at the property market in my area		
To relax / escapism			For education / information		
To give me something to talk about			For comment / analysis		
To stimulate my imagination			For business information / work		
To treat / reward myself			For research		
To keep up to date on local issues			To help form my opinions		
For national news and current affairs			To make me feel better		
For job vacancies and career advice			Other		

NR9 Here are some statements people have made about local newspapers. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I often notice the advertisements in local newspapers						
I trust my local newspaper more than a national newspaper						
I find local newspaper advertising informative						
I trust the advertising I see in my local newspaper						

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I value the local newspapers because they cover local news	☐	☐	☐	☐	☐	☐
I rarely look through the free newspapers that are delivered to my home	☐	☐	☐	☐	☐	☐
I prefer to look for local classified advertising on the internet rather than in my local newspaper	☐	☐	☐	☐	☐	☐
Regional newspaper ads often lead me to search the internet for information on products and services	☐	☐	☐	☐	☐	☐
My local newspaper is not as relevant to me now as it once was	☐	☐	☐	☐	☐	☐

MAGAZINE READERSHIP

MR1a How often do you read or look at **each** of the following magazines?

- **Almost always** (at least 3 out of 4 issues), **Quite often** (at least 1 out of 4 issues), **Occasionally** (less than 1 out of 4 issues). ***Please cross (x) one box for each magazine***

MR1b Which have you looked at in the **past 7 days**?

MR1c Which have you looked at in the **past 4 weeks?**

MR1d Which are your **favourites**?

MR1e Please indicate if you have visited the magazine's website in the past 4 weeks

Please cross (x) all that apply in each column

		MR1a How Often				MR1b	MR1c	MR1d	MR1e
		Almost always	Quite often	Occasionally	Not read in the past 12 months	Looked at in the past 7 days	Looked at in the past 4 weeks	One of my favourites	Visited website in the past 4 weeks
TV Listings magazines	Radio Times	☐	☐	☐	☐	☐	☐	☐	☐
	TV Choice	☐	☐	☐	☐	☐	☐	☐	☐
	TV Quick	☐	☐	☐	☐	☐	☐	☐	☐
	TV Times	☐	☐	☐	☐	☐	☐	☐	☐
	What's on TV	☐	☐	☐	☐	☐	☐	☐	☐
	Any other TV Listings Magazine	☐	☐	☐	☐	☐	☐	☐	☐
General Weekly magazines	Auto Trader	☐	☐	☐	☐	☐	☐	☐	☐
	The Economist	☐	☐	☐	☐	☐	☐	☐	☐
	Kerrang!	☐	☐	☐	☐	☐	☐	☐	☐
	NME	☐	☐	☐	☐	☐	☐	☐	☐
	Nuts	☐	☐	☐	☐	☐	☐	☐	☐
	Shortlist (free)	☐	☐	☐	☐	☐	☐	☐	☐
	Sport (free)	☐	☐	☐	☐	☐	☐	☐	☐
	Zoo	☐	☐	☐	☐	☐	☐	☐	☐
	Any other general weekly magazine	☐	☐	☐	☐	☐	☐	☐	☐
Woman's Weekly magazines	Bella	☐	☐	☐	☐	☐	☐	☐	☐
	Best	☐	☐	☐	☐	☐	☐	☐	☐
	Chat	☐	☐	☐	☐	☐	☐	☐	☐
	Closer	☐	☐	☐	☐	☐	☐	☐	☐
	Grazia	☐	☐	☐	☐	☐	☐	☐	☐

		Almost always	Quite often	Occasionally	Not read in the past 12 months	Looked at in the past 7 days	Looked at in the past 4 weeks	One of my favourites	Visited website in the past 4 weeks
	Heat	☐	☐	☐	☐	☐	☐	☐	☐
	Hello!	☐	☐	☐	☐	☐	☐	☐	☐
	Inside Soap	☐	☐	☐	☐	☐	☐	☐	☐
	Love It!	☐	☐	☐	☐	☐	☐	☐	☐
	New!	☐	☐	☐	☐	☐	☐	☐	☐
	Now	☐	☐	☐	☐	☐	☐	☐	☐
	OK!	☐	☐	☐	☐	☐	☐	☐	☐
	Pick Me Up	☐	☐	☐	☐	☐	☐	☐	☐
	Reveal	☐	☐	☐	☐	☐	☐	☐	☐
	Take a Break	☐	☐	☐	☐	☐	☐	☐	☐
	That's Life	☐	☐	☐	☐	☐	☐	☐	☐
	Woman's Weekly	☐	☐	☐	☐	☐	☐	☐	☐
	Women's Own	☐	☐	☐	☐	☐	☐	☐	☐
	Any other women's weekly magazine	☐	☐	☐	☐	☐	☐	☐	☐
Customer magazines	Asda Magazine	☐	☐	☐	☐	☐	☐	☐	☐
	Boots Health and Beauty	☐	☐	☐	☐	☐	☐	☐	☐
	Sainsbury's Magazine	☐	☐	☐	☐	☐	☐	☐	☐
	Sky Mag	☐	☐	☐	☐	☐	☐	☐	☐
	Sky Movies	☐	☐	☐	☐	☐	☐	☐	☐
	Sky Sports	☐	☐	☐	☐	☐	☐	☐	☐
	Somerfield Magazine	☐	☐	☐	☐	☐	☐	☐	☐
	Tesco Magazine	☐	☐	☐	☐	☐	☐	☐	☐
	Waitrose Food Illustrated	☐	☐	☐	☐	☐	☐	☐	☐
	Your M&S	☐	☐	☐	☐	☐	☐	☐	☐
	Any other monthly customer magazine	☐	☐	☐	☐	☐	☐	☐	☐
General Monthly magazines	BBC Gardener's World	☐	☐	☐	☐	☐	☐	☐	☐
	BBC Top Gear	☐	☐	☐	☐	☐	☐	☐	☐
	FHM	☐	☐	☐	☐	☐	☐	☐	☐
	Golf Monthly	☐	☐	☐	☐	☐	☐	☐	☐
	Men's Health	☐	☐	☐	☐	☐	☐	☐	☐
	National Geographic	☐	☐	☐	☐	☐	☐	☐	☐
	Reader's Digest	☐	☐	☐	☐	☐	☐	☐	☐
	Saga Magazine	☐	☐	☐	☐	☐	☐	☐	☐
	What Car?	☐	☐	☐	☐	☐	☐	☐	☐
	Any other general monthly magazine	☐	☐	☐	☐	☐	☐	☐	☐
Women's Monthly magazines	BBC Good Food	☐	☐	☐	☐	☐	☐	☐	☐
	Company	☐	☐	☐	☐	☐	☐	☐	☐
	Cosmopolitan	☐	☐	☐	☐	☐	☐	☐	☐

	Almost always	Quite often	Occasionally	Not read in the past 12 months	Looked at in the past 7 days	Looked at in the past 4 weeks	One of my favourites	Visited website in the past 4 weeks
Elle	☐	☐	☐	☐	☐	☐	☐	☐
Glamour	☐	☐	☐	☐	☐	☐	☐	☐
Good Housekeeping	☐	☐	☐	☐	☐	☐	☐	☐
Home & Gardens	☐	☐	☐	☐	☐	☐	☐	☐
Ideal Home	☐	☐	☐	☐	☐	☐	☐	☐
Marie Claire	☐	☐	☐	☐	☐	☐	☐	☐
Mother and Baby	☐	☐	☐	☐	☐	☐	☐	☐
Prima	☐	☐	☐	☐	☐	☐	☐	☐
Red	☐	☐	☐	☐	☐	☐	☐	☐
Vogue	☐	☐	☐	☐	☐	☐	☐	☐
Woman & Home	☐	☐	☐	☐	☐	☐	☐	☐
Any other women's monthly magazine	☐	☐	☐	☐	☐	☐	☐	☐

MR2a Thinking now about all the magazines you read, what are the **main reasons** you read magazines?

MR2b And what **other reasons** are also important?

Please cross (x) all that apply	MR3a Main reasons	MR3b Other reasons		MR3a Main reasons	MR3b Other reasons
For entertainment	☐	☐	For news and current affairs	☐	☐
To relax / escapism	☐	☐	For practical advice	☐	☐
To give me something to talk about	☐	☐	For education / information	☐	☐
To stimulate my imagination	☐	☐	To make me feel better	☐	☐
To treat / reward myself	☐	☐	For research	☐	☐
To keep up to date	☐	☐	For celebrity news and gossip	☐	☐
To keep me informed about my hobbies and interests	☐	☐	Other	☐	☐

MR3 Here are some statements people have made about **magazines**. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
Magazines give me ideas and inspiration	☐	☐	☐	☐	☐	☐
The writers of the articles in the magazines that I read seem to really understand what is important to me	☐	☐	☐	☐	☐	☐
I find magazine ads with web addresses, phone numbers or SMS text addresses useful	☐	☐	☐	☐	☐	☐
I make time to read my favourite magazine	☐	☐	☐	☐	☐	☐
I find magazine advertising informative	☐	☐	☐	☐	☐	☐
Magazines provide me with ideas of what to buy	☐	☐	☐	☐	☐	☐
I often talk to other people about things I read in magazines	☐	☐	☐	☐	☐	☐
If I am reading a magazine and I come across several pages of adverts, I always flick past them	☐	☐	☐	☐	☐	☐
I am more likely to buy a magazine if a product sample/gift is attached to it	☐	☐	☐	☐	☐	☐
I often pick up and read the same magazine several times before I'm finished with it	☐	☐	☐	☐	☐	☐
I tend to skim through magazines and rarely read anything in depth	☐	☐	☐	☐	☐	☐
I don't trust adverts that look like they are an article	☐	☐	☐	☐	☐	☐
I cannot resist buying magazines	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I buy and read my favourite magazines as soon as they appear in the newsagent	☐	☐	☐	☐	☐	☐
I hardly ever read or look at loose inserts in magazines	☐	☐	☐	☐	☐	☐
I often enter competitions in magazines	☐	☐	☐	☐	☐	☐
I trust the advertising I read in magazines	☐	☐	☐	☐	☐	☐
Magazine ads often lead me to search the internet for information on products and services	☐	☐	☐	☐	☐	☐

CINEMA AND FILMS

CI1a How often do you go to the cinema nowadays? ***Please cross (x) one box only***

Once a week or more often	☐	2 to 3 times a year	☐
2 or 3 times a month	☐	Once a year	☐
Once a month	☐	Less often	☐
Once every 2 to 3 months	☐	Never	☐ SKIP TO EVENTS SECTION (ES1a, PAGE 24)

CI1b When did you last go to the cinema? ***Please cross (x) one box only***

Past 7 days	☐	Past 6 months	☐
Past 4 weeks	☐	Past 12 months	☐
Past 3 months	☐	Not in the past 12 months	☐

CI2a Which of the following cinema chains do you visit **most often**?

CI2b And which **others** do you visit?

Please cross (x) all that apply	CI2a Visit most often	CI2b Others		CI2a Visit most often	CI2b Others
AMC	☐	☐	Vue	☐	☐
Apollo	☐	☐	Reeltime	☐	☐
Cineworld	☐	☐	Picturehouse\Cityscreen	☐	☐
Odeon	☐	☐	An independent cinema	☐	☐
Showcase	☐	☐	Other cinema	☐	☐
Empire	☐	☐			

CI3 Which are your favourite types of films to watch at the cinema? ***Please cross (x) all that apply***

Action	☐	Bollywood	☐	Drama	☐	Musical	☐
Adventure	☐	Children's	☐	Family	☐	Romance	☐
Animation	☐	Comedy (including romantic comedy)	☐	Fantasy	☐	Science fiction	☐
Art House	☐	Crime	☐	Foreign language	☐	Thriller	☐
Biopic	☐	Documentary	☐	Horror	☐	War	☐
						Other	☐

CI4a Thinking now about when you go to the cinema. What are your **main reasons** for **going to the cinema**?

CI4b And what **other reasons** are also important?

Please cross (x) all that apply

	CI4a Main Reasons	CI4b Other Reasons
For entertainment	☐	☐
To relax/escapism	☐	☐
Force of habit	☐	☐
To see my favourite film stars	☐	☐
To keep up to date with current films	☐	☐
To give me a night out	☐	☐
To accompany children to a film	☐	☐
To spend time with friends/family	☐	☐
To give me something to talk about	☐	☐
To stimulate my imagination	☐	☐
To treat/reward myself	☐	☐
To make me feel better	☐	☐
Other	☐	☐

CI5 How often do you do the following?

Please cross (x) one box only per row	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Buy a DVD (or Blu-ray Disc) at a store (such as HMV or Tesco)	☐	☐	☐	☐	☐	☐	☐	☐
Buy a DVD (or Blu-ray Disc) over the internet (such as Amazon or Play.com)	☐	☐	☐	☐	☐	☐	☐	☐
Rent a DVD (or Blu-ray Disc) from a video store (such as Blockbuster)	☐	☐	☐	☐	☐	☐	☐	☐
Rent a DVD (or Blu-ray Disc) from an online company (such as Lovefilm)	☐	☐	☐	☐	☐	☐	☐	☐
Pay to stream or download a full-length movie from an official online service (such as iTunes)	☐	☐	☐	☐	☐	☐	☐	☐
Stream or download a full-length movie from UNOFFICIAL websites, services or programs	☐	☐	☐	☐	☐	☐	☐	☐
Pay an additional one-off fee to your cable/satellite TV provider to watch a particular movie (pay-per-view)	☐	☐	☐	☐	☐	☐	☐	☐
Pay a one-off fee to watch a particular full-length movie downloaded directly to your games console	☐	☐	☐	☐	☐	☐	☐	☐

CI6 Here are some statements people have made about the **cinema**. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
When a film that I really want to see is released at the cinema, I will generally wait for it to appear on DVD/Blu-ray Disc then watch it at home	☐	☐	☐	☐	☐	☐
My children often influence which films I see at the cinema	☐	☐	☐	☐	☐	☐
I often decide which film to see only once I get to cinema	☐	☐	☐	☐	☐	☐
When a film that I really want to see is released at the cinema, I will generally go and see it as soon as it's released	☐	☐	☐	☐	☐	☐
Brands advertised in the cinema are often relevant to me	☐	☐	☐	☐	☐	☐
I tend to arrive in time to watch the ads before the film and trailers start	☐	☐	☐	☐	☐	☐
Products that advertise on cinema are more fashionable than those on TV	☐	☐	☐	☐	☐	☐
A film / film location has influenced my choice of holiday destination	☐	☐	☐	☐	☐	☐
There's no better place to watch films than the cinema	☐	☐	☐	☐	☐	☐
I feel left out if my friends are talking about a film I haven't seen	☐	☐	☐	☐	☐	☐
I am much more likely to go and see a film if it has been nominated or won an Oscar or a Bafta award	☐	☐	☐	☐	☐	☐
Movies give me ideas about style, fashion and music	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I often talk about films I've seen at the cinema with friends/family	☐	☐	☐	☐	☐	☐
I often get excited about a film before it is released	☐	☐	☐	☐	☐	☐
I trust the advertising I see at the cinema	☐	☐	☐	☐	☐	☐
I like the idea of using Bluetooth or SMS in the cinema to enter competitions or receive free downloads	☐	☐	☐	☐	☐	☐
Cinema ads often lead me to search online for information on products and services	☐	☐	☐	☐	☐	☐
I often buy the DVD/Blu-ray Disc of a film as a result of seeing it at the cinema	☐	☐	☐	☐	☐	☐
I like to buy new DVD/Blu-ray Disc releases as soon as they come out	☐	☐	☐	☐	☐	☐
When going to the cinema, I tend to plan my day/evening around seeing the film	☐	☐	☐	☐	☐	☐
I love the hype that surrounds big film releases	☐	☐	☐	☐	☐	☐
A cinema experience is better shared with friends/family	☐	☐	☐	☐	☐	☐
I look forward to seeing a film in 3D at the cinema	☐	☐	☐	☐	☐	☐

SPORTING EVENTS, EXHIBITIONS, SHOWS AND FESTIVALS

ES1a Which of the following events have you personally attended in the **past 12 months**?

ES1b And which of the following events have you watched on television in the **past 12 months**?

Please cross (x) all that apply in each column	ES1a Attended	ES1b Watched on TV		ES1a Attended	ES1b Watched on TV
Champions League football match	☐	☐	World Snooker Championship	☐	☐
English Premier League football match	☐	☐	Athletics (UK or European)	☐	☐
Scottish Premier League football match	☐	☐	World Darts Tournament	☐	☐
International football match	☐	☐	Tour de France	☐	☐
Other professional football match	☐	☐	The Open Golf Championship	☐	☐
Wimbledon Tennis	☐	☐	Ideal Home Show	☐	☐
The Grand National	☐	☐	BBC Good Food Show	☐	☐
Cheltenham Gold Cup	☐	☐	Chelsea Flower Show	☐	☐
Royal Ascot	☐	☐	Hampton Court Flower Show	☐	☐
Epsom Derby	☐	☐	The BBC Proms	☐	☐
Formula 1 Grand Prix Races	☐	☐	Glyndebourne Festival	☐	☐
International cricket	☐	☐	Oxford & Cambridge Boat Race	☐	☐
County cricket	☐	☐	Great North Run	☐	☐
London Marathon	☐	☐	Edinburgh Festival	☐	☐
Six Nations Championships (Rugby Union)	☐	☐	Glastonbury Music Festival	☐	☐
Any other rugby match	☐	☐	Any other music festival (e.g. Reading, Isle of Wight, T in the Park etc)	☐	☐

ES2 Here are some statements people have made about events. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I think that the London Olympics in 2012 will be good for Britain	☐	☐	☐	☐	☐	☐
I often notice brands which sponsor music events	☐	☐	☐	☐	☐	☐
Sponsorship is just another form of advertising	☐	☐	☐	☐	☐	☐
I often notice brands which sponsor sports teams and events	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
Without sponsorship, many sporting events would disappear	☐	☐	☐	☐	☐	☐
Without sponsorship many exhibitions and outdoor shows would not take place	☐	☐	☐	☐	☐	☐
When a company or brand sponsors an event or programme, I think more highly of them	☐	☐	☐	☐	☐	☐
I feel better about companies who sponsor projects which put something back into the community	☐	☐	☐	☐	☐	☐
I'm more inclined to purchase a product from a company that sponsors events than one that doesn't	☐	☐	☐	☐	☐	☐
I am planning to attend the London Olympics in 2012	☐	☐	☐	☐	☐	☐

MANAGING HOUSEHOLD PAPERWORK AND ROUTINES AT HOME

HP1 Please indicate who in your household tends to manage the following types of household paperwork?

Please cross (x) one box per row	I usually do	We take turns/ share	Another member of the household usually does	Don't know/ Not applicable
Sorting the post for the household	☐	☐	☐	☐
Checking statements (e.g. bank, gas, electricity etc)	☐	☐	☐	☐
Paying household bills (e.g. gas, electricity, water etc)	☐	☐	☐	☐
Saving or filing paperwork to read, fill in or use in future (e.g. forms to fill in; information to read about products & services or school activity; official paperwork to do with car MOTs, personal tax; local recycling, store openings; loyalty points; events)	☐	☐	☐	☐

In an average day, how many items of post does your household receive which are:

HP2a personally addressed, whether it's from people or companies you know or don't know? or

HP2b doordrops, e.g. leaflets, coupons and brochures through your letterbox which come unaddressed to you? or

HP2c inserts e.g. leaflets which come inside publications /letters/ bills etc.?

Please cross (x) one box only in each column	HP2a Items of post addressed to you	HP2b Doordrops	HP2c Inserts
None	☐	☐	☐
Less than 1 per day	☐	☐	☐
1 or 2 per day	☐	☐	☐
3 – 5 per day	☐	☐	☐
6 – 9 per day	☐	☐	☐
10 + per day	☐	☐	☐

ADVERTISING MAIL FROM COMPANIES OR ORGANISATIONS

DM1 Advertising mail is mail that is personally addressed to you that advertises products or services, doordrops posted through your door or inserts in publications/mail etc.

Which if any of the following have you done in response to advertising mail **during the past 12 months**?
Please cross (x) all that apply

- Bought or ordered something ☐
- Made an enquiry/request for more information by phone ☐
- Make an enquiry/request for more information online ☐
- Asked for information ☐
- Used a voucher or coupon ☐
- Tried a new product or service ☐
- Visited a store ☐
- Paid more attention to an advert ☐
- Kept it for later use/reference ☐
- Passed it onto someone else ☐
- I take no interest in mail from companies that advertise products or services ☐

DM2a Which types of companies have you received advertising mail about or from in the past four weeks? (this includes unaddressed doordrops and inserts you might have received in bills and inserts in publications)

DM2b And which types of companies have you **read** advertising mail from in the past four weeks?

DM2c As a result of receiving this mail, which did you **ask for information about** or investigate in the past 12 months?

DM2d As a result of receiving this mail, which did you **purchase a product or service from** in the past 12 months?

Please cross (x) all that apply	**DM2a Received in past 4 weeks**	**DM2b Read in past 4 weeks**	**DM2c Requested further information in past 12 months**	**DM2d Purchased from in past 12 months**
Banks	☐	☐	☐	☐
Books	☐	☐	☐	☐
Building Societies	☐	☐	☐	☐
Broadband providers	☐	☐	☐	☐
Building / home improvements companies	☐	☐	☐	☐
Cable and satellite TV	☐	☐	☐	☐
Cars	☐	☐	☐	☐
CDs/DVDs/Blu-ray Discs/Videos	☐	☐	☐	☐
Charities	☐	☐	☐	☐
Central government	☐	☐	☐	☐
Cinema / theatre	☐	☐	☐	☐
Computers	☐	☐	☐	☐
Credit Card companies	☐	☐	☐	☐
Electrical goods	☐	☐	☐	☐
Entertainment companies (e.g. Virgin/Sky)	☐	☐	☐	☐
Food / drink	☐	☐	☐	☐
Gardening / flowers	☐	☐	☐	☐
Holidays / travel	☐	☐	☐	☐
Household goods / toiletries	☐	☐	☐	☐
Insurance companies	☐	☐	☐	☐
Local government	☐	☐	☐	☐
Magazines	☐	☐	☐	☐
Mail Order	☐	☐	☐	☐
Football pools companies	☐	☐	☐	☐
Retailers	☐	☐	☐	☐

Please cross (x) all that apply	**DM2a Received in past 4 weeks**	**DM2b Read in past 4 weeks**	**DM2c Requested further information in past 12 months**	**DM2d Purchased from in past 12 months**
Take away restaurants	☐	☐	☐	☐
Telephone companies landline/mobile	☐	☐	☐	☐
Utilities (e.g. gas, electricity, water)	☐	☐	☐	☐
Other	☐	☐	☐	☐

DM3 Have you ever opted not to receive **advertising mail**? ***Please cross (x) one box only***

Yes, via the electoral roll	☐	Yes, I tick the opt out box on offers/ competitions	☐
Yes, via the mail preference service	☐	No	☐

DM4 What types of **advertising mail** do you find useful and what types not useful ? ***Please cross (x) one box per row***

	Very useful	**Quite useful**	**Not useful**
General information	☐	☐	☐
Discount coupons / Offers	☐	☐	☐
Product samples	☐	☐	☐
Catalogues	☐	☐	☐
Competitions / promotions	☐	☐	☐
Government information	☐	☐	☐

DM5 Here are some statements people have made about advertising mail. Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	**Definitely agree**	**Tend to agree**	**Neither agree nor disagree**	**Tend to disagree**	**Definitely disagree**	**Don't know/Not applicable**
Most of my advertising mail is thrown away or recycled without me even looking at it	☐	☐	☐	☐	☐	☐
I trust the advertising mail I receive through my door	☐	☐	☐	☐	☐	☐
I pay more attention to those mail items which are personally addressed to me	☐	☐	☐	☐	☐	☐
I keep some advertising mail from companies when I find the content useful	☐	☐	☐	☐	☐	☐
The amount of advertising mail that comes through my door each day really annoys me	☐	☐	☐	☐	☐	☐
I actively search for money-off vouchers in my post	☐	☐	☐	☐	☐	☐
I am quite happy for companies that I have bought something from to send me information on other goods and services	☐	☐	☐	☐	☐	☐
I like advertising mail from companies that rewards customer loyalty	☐	☐	☐	☐	☐	☐
I do not mind receiving advertising mail if its content is relevant to me	☐	☐	☐	☐	☐	☐
I open all my post including advertising mail items	☐	☐	☐	☐	☐	☐
If it is a matter of national importance, the Government should send details to every household	☐	☐	☐	☐	☐	☐
A piece of advertising mail from a company can give me a good impression of a brand	☐	☐	☐	☐	☐	☐
I am more likely to open/read something through my door if I have already seen/heard something about it before	☐	☐	☐	☐	☐	☐
The way a mailing looks has a bearing on whether I open it	☐	☐	☐	☐	☐	☐
I like receiving product samples through the mail	☐	☐	☐	☐	☐	☐

TECHNOLOGY OWNERSHIP

TO1a How many TV sets do you have at home that receive each of the following types of television services?
Please cross (x) one box for each row

TO1b And, which television service do you receive on your main set at home?
Please cross (x) one box only

	TO1a No sets	TO1a 1 set	TO1a 2 sets	TO1a 3 sets	TO1a 4+sets	TO1b Main set
The main 5 channels **ONLY** (BBC1/2, ITV1, C4/S4C, five)	☐	☐	☐	☐	☐	☐
TV programmes via Digital Terrestrial Television (DTT) e.g. Freeview	☐	☐	☐	☐	☐	☐
TV programmes from Virgin Media	☐	☐	☐	☐	☐	☐
TV programmes from Sky	☐	☐	☐	☐	☐	☐
Freesat	☐	☐	☐	☐	☐	☐
Tiscali TV	☐	☐	☐	☐	☐	☐
BT Vision	☐	☐	☐	☐	☐	☐
Top Up TV	☐	☐	☐	☐	☐	☐
TV Programmes via the internet	☐	☐	☐	☐	☐	☐
Other television service	☐	☐	☐	☐	☐	☐

TO2a Do you, or does anyone else in your household, own any of the following equipment at home?

TO2b Do you, or does anyone else in your household, intend to purchase any of the following equipment in the next 12 months?

Please cross (x) all that apply in each column

	TO2a Own	TO2b Intend to purchase
Digital camera (not part of a mobile phone)	☐	☐
Digital camcorder	☐	☐
Digital photo frame	☐	☐
Digital photo printer	☐	☐
Integrated digital TV set with Freeview	☐	☐
Integrated digital TV set with Freesat	☐	☐
Set-top box to receive digital broadcasts	☐	☐
Widescreen TV set	☐	☐
Plasma or LCD television screen	☐	☐
HDTV set / HDTV ready set	☐	☐
HDTV set-top box (e.g. Sky HD, Virgin HD)	☐	☐
PVR - hard disk video recorder (e.g. Sky+, V+)	☐	☐
Multi–speaker audio system for your TV	☐	☐
Home cinema	☐	☐
A mobile device for watching television	☐	☐
MP3 player (e.g. iPod)	☐	☐
MP4 player (e.g. Archos, video iPod etc.)	☐	☐
Desktop PC	☐	☐
Apple Mac	☐	☐
Laptop PC / Macbook	☐	☐

	TO2a Own	TO2b Intend to purchase
Wi-Fi home network	☐	☐
Microsoft Media Centre PC	☐	☐
Hand held PDA (e.g. Palm, Pocket PC, Blackberry)	☐	☐
Smart phone (e.g. iPhone)	☐	☐
TV-enabled mobile phone	☐	☐
Telephone landline (not mobile phone)	☐	☐
DVD player	☐	☐
DVD recorder and player	☐	☐
Blu-ray Disc player (not PS3)	☐	☐
PC DVD writer	☐	☐
Portable DVD player	☐	☐
Slingbox	☐	☐
HDD portable media player	☐	☐
DAB digital radio	☐	☐
UMPC (ultra mobile PC)	☐	☐
Portable games system (e.g. PSP/DS/DS Lite)	☐	☐
Any other computer games console (e.g. Xbox, Sony Playstation, Nintendo Wii etc.)	☐	☐
SatNav	☐	☐
E-reader	☐	☐

TO3a Which, if any, of the following interactive television services have you **ever** used/accessed using the **red button** on your remote control?

TO3b And which, if any, of the following interactive television services have you used/accessed in the **past 4 weeks**?

Please cross (x) all that apply	TO3a Ever used	TO3b Used in past 4 weeks		TO3a Ever used	TO3b Used in past 4 weeks
Sent for a free product sample			Looked for a job		
Sent off for a brochure / further information			Used Player Cam		
Used banking facilities			Placed a bet		
Ordered a pizza			Bought a lottery ticket		
Ordered other goods			Voted (e.g. Big Brother or other)		
Selected a different sports broadcast to watch			Watched a catch up television service		
Viewed extra text facts & information supplied on specific programmes			Looked for travel information		
Read sports/news/weather **headlines**			Watched extra coverage of one off events & programmes (e.g. Glastonbury, Wimbledon)		
Watched sports/news/weather **video**			Entered competitions		
Played games			Other		
Used separate pay per view TV (e.g. films, sport)					
Checked cinema times			Never use interactive TV services		

GAMING

G1 Have you used a games console in the past 12 months?

Yes ☐ **CONTINUE TO G2a**

No ☐ **SKIP TO INTERNET SECTION (IN1, PAGE 31)**

G2a Do you, or does anyone else in your household, own any of the following games consoles?

G2b Do you, or does anyone else in your household, intend to purchase any of the following games consoles in the next 12 months?

Please cross (x) all that apply	G2a Have now	G2b Intend to purchase		G2a Have now	G2b Intend to purchase
Xbox			Nintendo Wii		
Xbox 360			Nintendo DS/DS Lite/DSi		
Playstation 2 (PS2)			Playstation Portable (PSP)		
Playstation 3 (PS3)			Other games console		

G3 How often do you play the following types of games?

Please cross (x) all that apply	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Games bought on a disc								
Single player games online								
Multi-play games online								
Games on a hand held device (not a mobile phone)								
Games on a mobile phone								

G4 How often do you do the following on a games console? ***Please cross (x) one box only per row***

	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Play games alone	☐	☐	☐	☐	☐	☐	☐	☐	☐
Play games with my family	☐	☐	☐	☐	☐	☐	☐	☐	☐
Play games with friends in my home	☐	☐	☐	☐	☐	☐	☐	☐	☐
Play games with friends in another location	☐	☐	☐	☐	☐	☐	☐	☐	☐
Watch DVDs/Blu-ray Discs	☐	☐	☐	☐	☐	☐	☐	☐	☐
Connect to the internet	☐	☐	☐	☐	☐	☐	☐	☐	☐
Play games with other online users	☐	☐	☐	☐	☐	☐	☐	☐	☐
Compare scores/achievements with other gamers online	☐	☐	☐	☐	☐	☐	☐	☐	☐
Download free FULL version games	☐	☐	☐	☐	☐	☐	☐	☐	☐
Download movie trailers	☐	☐	☐	☐	☐	☐	☐	☐	☐
Surf / access websites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Communicate with friends using voice, video or chat	☐	☐	☐	☐	☐	☐	☐	☐	☐
Watch online TV services such as BBC iPlayer etc	☐	☐	☐	☐	☐	☐	☐	☐	☐
Download free additional content from the official online store for games you already own (e.g. extra levels)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pay to download additional content from the official online store for games you already own (e.g. extra levels)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pay to download full games from the official online store	☐	☐	☐	☐	☐	☐	☐	☐	☐

G5 How often do you:

Please cross (x) one box only per row	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Buy a new game on disc at a store (such as HMV or Tesco)	☐	☐	☐	☐	☐	☐
Buy a new game on disc over the internet (such as Amazon or Play.com)	☐	☐	☐	☐	☐	☐
Buy a second hand game on disc	☐	☐	☐	☐	☐	☐
Rent a game on disc from a video store (such as Blockbuster)	☐	☐	☐	☐	☐	☐
Rent a game from an online company (such as Lovefilm)	☐	☐	☐	☐	☐	☐
Pay to download a game from an official website (such as Steam)	☐	☐	☐	☐	☐	☐
Pay to download a game from the console itself (such as Wii Virtual Console)	☐	☐	☐	☐	☐	☐

G6 Here are some statements people have made about gaming. Please indicate how much you agree or disagree?

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
In the future, I expect more of the games I play to be downloaded or streamed than bought on disc	☐	☐	☐	☐	☐	☐
I would only download online games from an officially authorised site	☐	☐	☐	☐	☐	☐
I'm buying less games due to the current economic conditions	☐	☐	☐	☐	☐	☐
I am happy for game screens and soundtracks to include product placements and adverts (e.g. billboards) so long as this does not interfere with the gameplay	☐	☐	☐	☐	☐	☐
I like to play free demos of games from the internet before deciding whether to pay to own them	☐	☐	☐	☐	☐	☐

INTERNET

IN1 Have you used the internet for any purpose (e.g. website access, e-mails etc.) in the past 12 months?

Yes ☐ **CONTINUE TO IN2a**

No ☐ **SKIP TO MOBILE PHONE SECTION (MP1, PAGE 39)**

IN2a How long ago did you start using the internet from any location?

IN2b How long ago did you get an internet connection at home?

Please cross (x) one box per column	**IN2a Used at all**	**IN2b Home**
Less than six months ago	☐	☐
Six months to a year ago	☐	☐
1 – 2 years ago	☐	☐
3 – 4 years ago	☐	☐
5 – 6 years ago	☐	☐
7 – 10 years ago	☐	☐
More than 10 years ago	☐	☐

IN3a Where do you mainly access the internet?

IN3b And which other places do you access the internet? ***Please cross (x) all that apply***

	IN3a Main	**IN3b Other**
At home	☐	☐
At work	☐	☐
At school / college / university	☐	☐
At a library / internet café / kiosk	☐	☐
In Wi-Fi hotspots	☐	☐
While travelling on trains, buses etc	☐	☐
Generally on the move	☐	☐
Elsewhere	☐	☐

IN4 When accessing the internet at home, where do you mainly use it? In what other places do you use it? ***Please cross (x) all that apply***

	Mainly use	**Also use**
Living room	☐	☐
Kitchen	☐	☐
Study / office	☐	☐
Bedroom	☐	☐
Garden	☐	☐
Other locations	☐	☐

IN5a What type of equipment do you mainly use to access the internet at home?

IN5b And what other equipment do you use to access the internet at home?

Please cross (x) all that apply	**IN5a Main**	**IN5b Other**
On a fixed desk top PC	☐	☐
Laptop/ notebook/mobile notebook	☐	☐
Through your mobile phone/PDA	☐	☐
Through a games console e.g. XBox, Playstation, Wii	☐	☐
Through a handheld games console e.g. PSP, DS Lite	☐	☐
Through a television	☐	☐
Other	☐	☐

IN6 How many of each of the following computers are there in your home which are used by someone on a regular basis? ***Please cross (x) one box only per row***

	None	**1**	**2**	**3+**
Desktop computer	☐	☐	☐	☐
Laptop computer	☐	☐	☐	☐

IN7a Do you have broadband internet connection at home?

IN7b If not, are you planning to get broadband in the next 12 months? ***Please cross (x) one box***

	IN7a Have now	**IN7b Planning to get**
Yes	☐	☐
No	☐	☐
Don't know	☐	☐

IN7c If you have a PC at work, is it? ***Please cross (x) one box only***

Primarily, for your use only	☐
Shared with co-workers	☐
Do not have use of a PC at work	☐
Not applicable	☐

IN8a Which is your main internet service provider (ISP) at home? ***Please cross (x) one box in the relevant column below***

IN8b And which other internet service providers (ISP) do you use at home? ***Please cross (x) all that apply in the relevant column below***

	IN8a Main ISP	IN8b Other ISP at home
AOL	☐	☐
Be Unlimited	☐	☐
BT	☐	☐
Demon	☐	☐
O2	☐	☐
Onetel	☐	☐
Orange	☐	☐
Pipex	☐	☐
PlusNet	☐	☐
Sky	☐	☐
Talk Talk	☐	☐
Tiscali	☐	☐
Tesco	☐	☐
UK Online	☐	☐
Virgin Media	☐	☐
Other ISP	☐	☐
Not sure – internet connection supplied by work	☐	☐
Do not use the internet at home	☐	☐

IN9a Which internet search engines do you currently use at all? ***Please cross (x) all that apply in the relevant column below***

IN9b And which search engine do you use the most? ***Please cross (x) one box in the relevant column below***

	IN9a Currently use at all	IN9b Use the most
alot.com	☐	☐
AltaVista	☐	☐
AOL Search	☐	☐
Ask.com	☐	☐
BBC Search	☐	☐
Bing	☐	☐
Google	☐	☐
Kellysearch	☐	☐
MSN / Windows Live Search	☐	☐
Mseeks.com	☐	☐
My Web Search	☐	☐
Orange Search	☐	☐
Park Need	☐	☐
Trovit	☐	☐
UFindUs	☐	☐
Yahoo!	☐	☐
Other	☐	☐

IN10 Which, if any, of the following instant internet communication services have you used in the past 4 weeks? ***Please cross (x) all that apply***

- AOL messenger (AIM) ☐
- Facebook Chat ☐
- Google Talk / Google-mail Chat ☐
- ICQ ☐
- Orange Messenger ☐
- Skype Instant Messaging ☐
- Twitter ☐
- Windows Live / MSN Messenger ☐
- Yahoo! Messenger ☐
- Other instant internet messaging service ☐

IN11 How often do you visit the following types of websites/web pages?

Please cross (x) all that apply	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Auction	☐	☐	☐	☐	☐	☐	☐	☐	☐
Betting/ Gambling	☐	☐	☐	☐	☐	☐	☐	☐	☐
Blogging sites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Business	☐	☐	☐	☐	☐	☐	☐	☐	☐
Cars / motoring	☐	☐	☐	☐	☐	☐	☐	☐	☐
Central government	☐	☐	☐	☐	☐	☐	☐	☐	☐

Please cross (x) all that apply	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Charity / appeals	☐	☐	☐	☐	☐	☐	☐	☐	☐
Cinema listings	☐	☐	☐	☐	☐	☐	☐	☐	☐
Comedy / entertainment	☐	☐	☐	☐	☐	☐	☐	☐	☐
Dating	☐	☐	☐	☐	☐	☐	☐	☐	☐
Education	☐	☐	☐	☐	☐	☐	☐	☐	☐
Environment / green sites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Films	☐	☐	☐	☐	☐	☐	☐	☐	☐
Games	☐	☐	☐	☐	☐	☐	☐	☐	☐
Gardening	☐	☐	☐	☐	☐	☐	☐	☐	☐
Health e.g. NHS Direct, Net Doctor	☐	☐	☐	☐	☐	☐	☐	☐	☐
Holidays / travel	☐	☐	☐	☐	☐	☐	☐	☐	☐
Home improvements	☐	☐	☐	☐	☐	☐	☐	☐	☐
Insurance	☐	☐	☐	☐	☐	☐	☐	☐	☐
Jobs / recruitment	☐	☐	☐	☐	☐	☐	☐	☐	☐
Lifestyle websites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Local government / council	☐	☐	☐	☐	☐	☐	☐	☐	☐
Magazine websites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Maps / travel news and directions / public transport	☐	☐	☐	☐	☐	☐	☐	☐	☐
Mobile phones e.g. network provider websites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Music	☐	☐	☐	☐	☐	☐	☐	☐	☐
News headlines	☐	☐	☐	☐	☐	☐	☐	☐	☐
Online directories (e.g. yell.com)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Personal finance	☐	☐	☐	☐	☐	☐	☐	☐	☐
Price Comparison Sites e.g. Price runner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Property e.g. estate agent websites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Public information sites (e.g. Safety, Welfare etc.)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Shopping / retail (grocery)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Shopping/ retail (non grocery)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Social networking / communication (e.g. Bebo, Myspace, Facebook)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Sports	☐	☐	☐	☐	☐	☐	☐	☐	☐
Ticketing (e.g. cinema, concerts etc.)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Weather	☐	☐	☐	☐	☐	☐	☐	☐	☐
Women's	☐	☐	☐	☐	☐	☐	☐	☐	☐
Work related sites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Voucher/ coupon sites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Video sites such as 'YouTube'	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other website	☐	☐	☐	☐	☐	☐	☐	☐	☐

IN12 How often do you visit the following websites/ portals? ***Please cross (x) all that apply.***

	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
All About You	☐	☐	☐	☐	☐	☐	☐	☐	☐
Amazon	☐	☐	☐	☐	☐	☐	☐	☐	☐
AOL	☐	☐	☐	☐	☐	☐	☐	☐	☐
AOL Women	☐	☐	☐	☐	☐	☐	☐	☐	☐
Apple	☐	☐	☐	☐	☐	☐	☐	☐	☐
Argos	☐	☐	☐	☐	☐	☐	☐	☐	☐
Ask Search	☐	☐	☐	☐	☐	☐	☐	☐	☐
Babycentre network	☐	☐	☐	☐	☐	☐	☐	☐	☐
BBC	☐	☐	☐	☐	☐	☐	☐	☐	☐
BBC Communities	☐	☐	☐	☐	☐	☐	☐	☐	☐
Bebo	☐	☐	☐	☐	☐	☐	☐	☐	☐
Blogger	☐	☐	☐	☐	☐	☐	☐	☐	☐
BT	☐	☐	☐	☐	☐	☐	☐	☐	☐
Business Link	☐	☐	☐	☐	☐	☐	☐	☐	☐
Channel 4	☐	☐	☐	☐	☐	☐	☐	☐	☐
Deezer	☐	☐	☐	☐	☐	☐	☐	☐	☐
Digg	☐	☐	☐	☐	☐	☐	☐	☐	☐
Directgov	☐	☐	☐	☐	☐	☐	☐	☐	☐
eBay	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expedia	☐	☐	☐	☐	☐	☐	☐	☐	☐
Facebook	☐	☐	☐	☐	☐	☐	☐	☐	☐
Flickr	☐	☐	☐	☐	☐	☐	☐	☐	☐
Fox	☐	☐	☐	☐	☐	☐	☐	☐	☐
Friends Reunited	☐	☐	☐	☐	☐	☐	☐	☐	☐
Gaydar	☐	☐	☐	☐	☐	☐	☐	☐	☐
Genes Reunited	☐	☐	☐	☐	☐	☐	☐	☐	☐
Get Lippy	☐	☐	☐	☐	☐	☐	☐	☐	☐
Glam	☐	☐	☐	☐	☐	☐	☐	☐	☐
Good To Know network	☐	☐	☐	☐	☐	☐	☐	☐	☐
Google	☐	☐	☐	☐	☐	☐	☐	☐	☐
Handbag	☐	☐	☐	☐	☐	☐	☐	☐	☐
House To Home network	☐	☐	☐	☐	☐	☐	☐	☐	☐
iTunes	☐	☐	☐	☐	☐	☐	☐	☐	☐
ITV	☐	☐	☐	☐	☐	☐	☐	☐	☐
iVillage	☐	☐	☐	☐	☐	☐	☐	☐	☐
Lastminute	☐	☐	☐	☐	☐	☐	☐	☐	☐
LinkedIn	☐	☐	☐	☐	☐	☐	☐	☐	☐
Lycos Europe	☐	☐	☐	☐	☐	☐	☐	☐	☐
MSN/ Windows Live	☐	☐	☐	☐	☐	☐	☐	☐	☐

	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Multimap	☐	☐	☐	☐	☐	☐	☐	☐	☐
MyDeco	☐	☐	☐	☐	☐	☐	☐	☐	☐
Myspace	☐	☐	☐	☐	☐	☐	☐	☐	☐
Orange	☐	☐	☐	☐	☐	☐	☐	☐	☐
PayPal	☐	☐	☐	☐	☐	☐	☐	☐	☐
Piczo	☐	☐	☐	☐	☐	☐	☐	☐	☐
Rightmove	☐	☐	☐	☐	☐	☐	☐	☐	☐
Second Life	☐	☐	☐	☐	☐	☐	☐	☐	☐
Shooting network	☐	☐	☐	☐	☐	☐	☐	☐	☐
Six Apart TypePad	☐	☐	☐	☐	☐	☐	☐	☐	☐
Sky	☐	☐	☐	☐	☐	☐	☐	☐	☐
Spotify	☐	☐	☐	☐	☐	☐	☐	☐	☐
Style Finder	☐	☐	☐	☐	☐	☐	☐	☐	☐
Tesco	☐	☐	☐	☐	☐	☐	☐	☐	☐
Ticketmaster	☐	☐	☐	☐	☐	☐	☐	☐	☐
Tiscali	☐	☐	☐	☐	☐	☐	☐	☐	☐
Twitter	☐	☐	☐	☐	☐	☐	☐	☐	☐
Virgin Media	☐	☐	☐	☐	☐	☐	☐	☐	☐
Wikipedia	☐	☐	☐	☐	☐	☐	☐	☐	☐
Windows Live Spaces	☐	☐	☐	☐	☐	☐	☐	☐	☐
Wordpress	☐	☐	☐	☐	☐	☐	☐	☐	☐
Yahoo!	☐	☐	☐	☐	☐	☐	☐	☐	☐
Yahoo! Groups	☐	☐	☐	☐	☐	☐	☐	☐	☐
YBW.com	☐	☐	☐	☐	☐	☐	☐	☐	☐
Yell	☐	☐	☐	☐	☐	☐	☐	☐	☐
YouTube	☐	☐	☐	☐	☐	☐	☐	☐	☐

IN13 How often do you use the internet for the following activities? ***Please cross (x) all that apply***

	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Sending / receiving e-mails	☐	☐	☐	☐	☐	☐	☐	☐	☐
Receiving e-mail alerts	☐	☐	☐	☐	☐	☐	☐	☐	☐
Receiving e-mail bulletins	☐	☐	☐	☐	☐	☐	☐	☐	☐
Internet voice calls (VOIP)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Video messaging/online conferencing	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading mobile phone logos or ring tones	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading applications for my mobile phone	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading/sending photos	☐	☐	☐	☐	☐	☐	☐	☐	☐
Uploading photos for sharing	☐	☐	☐	☐	☐	☐	☐	☐	☐
Socialising/ keeping in contact with friends / making friends	☐	☐	☐	☐	☐	☐	☐	☐	☐
Instant messaging	☐	☐	☐	☐	☐	☐	☐	☐	☐

	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Contributing to an online chat room/ discussion forum	☐	☐	☐	☐	☐	☐	☐	☐	☐
Updating my status	☐	☐	☐	☐	☐	☐	☐	☐	☐
Typing your own weblog/blog	☐	☐	☐	☐	☐	☐	☐	☐	☐
Reading other peoples' blogs	☐	☐	☐	☐	☐	☐	☐	☐	☐
Contributing comments to someone else's web blog	☐	☐	☐	☐	☐	☐	☐	☐	☐
Updating your own website	☐	☐	☐	☐	☐	☐	☐	☐	☐
Contributing to a collaborative website such as Wikipedia	☐	☐	☐	☐	☐	☐	☐	☐	☐
Listening to/watching podcasts	☐	☐	☐	☐	☐	☐	☐	☐	☐
Sharing digital music tracks with friends	☐	☐	☐	☐	☐	☐	☐	☐	☐
Making a short video and uploading it	☐	☐	☐	☐	☐	☐	☐	☐	☐
Watching video clips online	☐	☐	☐	☐	☐	☐	☐	☐	☐
Watching films online (streaming)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading films	☐	☐	☐	☐	☐	☐	☐	☐	☐
Watching television programmes online (streaming)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading TV programmes	☐	☐	☐	☐	☐	☐	☐	☐	☐
Listening to music online (streaming)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Listening to a radio station online	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading music	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading software	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading games	☐	☐	☐	☐	☐	☐	☐	☐	☐
Downloading screensavers	☐	☐	☐	☐	☐	☐	☐	☐	☐
Looking at information on products or services	☐	☐	☐	☐	☐	☐	☐	☐	☐
Using online price comparison sites	☐	☐	☐	☐	☐	☐	☐	☐	☐
Looking at information connected with your work	☐	☐	☐	☐	☐	☐	☐	☐	☐
Looking at information connected with school / college / university work	☐	☐	☐	☐	☐	☐	☐	☐	☐
Looking for a job	☐	☐	☐	☐	☐	☐	☐	☐	☐
Looking for a new home	☐	☐	☐	☐	☐	☐	☐	☐	☐
Looking at cinema / theatre / concert listings	☐	☐	☐	☐	☐	☐	☐	☐	☐
Advice	☐	☐	☐	☐	☐	☐	☐	☐	☐
Diets/recipes	☐	☐	☐	☐	☐	☐	☐	☐	☐
Online banking	☐	☐	☐	☐	☐	☐	☐	☐	☐
Paying bills online	☐	☐	☐	☐	☐	☐	☐	☐	☐
Checking stocks and shares	☐	☐	☐	☐	☐	☐	☐	☐	☐
Buying products and / or services	☐	☐	☐	☐	☐	☐	☐	☐	☐
Grocery shopping	☐	☐	☐	☐	☐	☐	☐	☐	☐
Making holiday / travel plans / booking holidays, flights, ferry crossings, train tickets etc. online	☐	☐	☐	☐	☐	☐	☐	☐	☐
Online auctions	☐	☐	☐	☐	☐	☐	☐	☐	☐
Betting / gambling	☐	☐	☐	☐	☐	☐	☐	☐	☐
Viewing RSS news feeds	☐	☐	☐	☐	☐	☐	☐	☐	☐

	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Every 2-3 months	At least once a year	Not in past year /Never
Checking the news headlines									
Checking sports results									
Celebrity news									
Checking the weather									
Looking at a magazine website									
Looking at a national newspaper website									
Looking at a regional newspaper website									

IN14a Which, if any, of the following products and services have you researched / browsed online in the past 6 months?

IN14b Which have you purchased online in the past 6 months?

Please cross (x) all that apply	IN14a Browsed in past 6 months	IN14b Purchased online in past 6 months		IN14a Browsed in past 6 months	IN14b Purchased online in past 6 months
Books / CDs / Videos / DVDs / Blu-ray Discs			Toys		
Clothing / accessories / jewellery			Computer hardware (including personal computer)		
Event tickets – music / cinema / theatre / sporting event			Mobile communication devices (e.g. mobile phones / PDAs)		
Flowers / chocolates / gifts / greeting cards			Apps for my mobile phone		
Health or beauty products			MP3 and other music files		
Products for your pets			Consumer electronics (e.g. Hi-fi, TV)		
Beers / wine / spirits			Home appliances		
Food / groceries			Computer software		
Cars			Computer games		
Car rental			Insurance		
Property to buy or rent			Financial products or services (e.g. loans, credit cards, savings, stocks, shares etc)		
Home furnishings / DIY			Holidays / hotel accommodation		
Garden equipment / products			Travel tickets (e.g. flights, train)		
Photographic equipment			Other		
Sports equipment					

IN15a What are your **main reasons** for using **the internet**?

IN15b And what **other reasons** are also important?

Please cross (x) all that apply	**IN15a Main Reasons**	**IN15b Other Reasons**		**IN15a Main Reasons**	**IN15b Other Reasons**
For entertainment	☐	☐	For comment / analysis	☐	☐
To relax / escapism	☐	☐	For company information / work	☐	☐
To give me something to talk about	☐	☐	To keep in touch with what is going on in my area	☐	☐
To stimulate my imagination	☐	☐	To communicate with others	☐	☐
To treat / reward myself	☐	☐	To purchase goods and / or services	☐	☐
To keep up to date	☐	☐	To research a product and / or service	☐	☐
For news and current affairs	☐	☐	To manage finances / banking	☐	☐
To fill time	☐	☐	To meet and talk to other like-minded people	☐	☐
To keep in touch with family and friends	☐	☐	To help plan my social life	☐	☐
For practical advice	☐	☐	To make me feel better	☐	☐
For education	☐	☐	Other	☐	☐
For information	☐	☐			

IN16 Here are some statements people have made about the internet. Please indicate how much you agree or disagree?

Please cross (x) one box for each statement	**Definitely agree**	**Tend to agree**	**Neither agree nor disagree**	**Tend to disagree**	**Definitely disagree**	**Don't know/Not applicable**
I'm concerned about companies tracking what I visit on the internet	☐	☐	☐	☐	☐	☐
I trust online reviews written by other users more than the ones written by companies	☐	☐	☐	☐	☐	☐
Accessing the internet from my mobile phone can be frustrating	☐	☐	☐	☐	☐	☐
I like downloading content from the internet, so that I can listen or watch it later	☐	☐	☐	☐	☐	☐
I find online adverts more interesting if I can interact with them	☐	☐	☐	☐	☐	☐
I tend to visit the same set of websites when I use the internet	☐	☐	☐	☐	☐	☐
The internet allows me to make better informed purchases	☐	☐	☐	☐	☐	☐
I am happy to give details or answer a few questions on a website if it gives me more relevant information	☐	☐	☐	☐	☐	☐
I worry about children accessing improper material on the internet	☐	☐	☐	☐	☐	☐
I am accessing the internet through my mobile phone more these days	☐	☐	☐	☐	☐	☐
I only tend to go online when I need to get something specific done	☐	☐	☐	☐	☐	☐
I find advertising on the internet very irritating	☐	☐	☐	☐	☐	☐
I like to have immediate access to the news as it happens	☐	☐	☐	☐	☐	☐
I find the internet a really useful source for news	☐	☐	☐	☐	☐	☐
I trust the advertising I see on the internet	☐	☐	☐	☐	☐	☐
I would not use the internet to buy things as I am too concerned about internet fraud	☐	☐	☐	☐	☐	☐
I am accessing the internet more on the move these days	☐	☐	☐	☐	☐	☐
I find the adverts included in downloaded video content annoying	☐	☐	☐	☐	☐	☐
The internet is an essential part of my life	☐	☐	☐	☐	☐	☐

IN17 Have you subscribed to podcasts / downloads (free or paid for) from any of the following suppliers in the past 3 months? ***Please cross (x) all that apply***

Radio
- BBC ☐
- LBC ☐
- XFM ☐
- Absolute ☐
- Capital ☐
- talkSPORT ☐
- Any other UK radio station ☐

Television
- BBC ☐
- ITV ☐
- Channel 4 ☐
- Five ☐
- Sky ☐
- Any other UK television station ☐

Newspapers
- Daily Mail ☐
- The Daily Telegraph ☐
- The Guardian ☐
- The Sun ☐
- The Times ☐
- Any other UK newspaper ☐

None of these ☐ **SKIP TO MOBILE PHONE SECTION (MP1, PAGE 39)**

IN18 What type of podcasts do you tend to listen to / view? ***Please cross (x) all that apply***

- Arts ☐
- Business ☐
- Comedy ☐
- Education ☐
- Films ☐
- Games and hobbies ☐
- Government Organisations/ Public Information ☐
- Health ☐
- Kids and family ☐
- Media news ☐
- Music ☐
- News and politics ☐
- Religion and spirituality ☐
- Science and medicine ☐
- Society and culture ☐
- Sports and recreation ☐
- Technology ☐
- TV ☐
- Other ☐

IN19 Where do you normally listen to podcasts? ***Please cross (x) all that apply***

- At home ☐
- In the car ☐
- Whilst walking ☐
- At work ☐
- On public transport ☐
- Whilst exercising ☐
- Other ☐

MOBILE PHONES

MP1 Do you have a mobile phone or a mobile device which can receive or make phone calls?
(please include both personal and work mobile phones/devices)

Yes, 1 ☐ Yes, 2 or more ☐ No ☐

MP2 Do you intend to purchase a new mobile phone/device or upgrade an existing one in the next 12 months? ***Please cross (x) one box only***

- Yes – purchase a new mobile phone/device ☐
- Yes – upgrade an existing mobile phone/device ☐
- No I do not intend to purchase a new phone/device in the next 12 months ☐

IF YOU DO NOT OWN A MOBILE PHONE / DEVICE, PLEASE SKIP TO THE SHOPPING SECTION (SH1, PAGE 42)

MP3 How many of each of the following types of mobile phone/device do you personally have?

Please cross (x) one box for each row	0	1	2	3+
Pay Monthly Contract (personal)	☐	☐	☐	☐
Contract through work	☐	☐	☐	☐
Pay as you go	☐	☐	☐	☐

MP4 Who is your mobile phone/device provider(s)? ***Please cross (x) all that apply***

3	☐	T-Mobile	☐	Vodafone	☐
O2	☐	Talkmobile	☐	Virgin Mobile	☐
Orange	☐	Tesco	☐	Other	☐

MP5a Which features does your mobile phone/s/devices **have now**?

MP5b Which features are you **interested in** having in any future upgrade of your mobile phone/device?

Please cross (x) all that apply	MP5a Have Now	MP5b Interested In		MP5a Have Now	MP5b Interested In
Calls or texts only	☐	☐	Instant messaging	☐	☐
Photo / picture messaging	☐	☐	Smartphone features (access to office documents, scheduling etc.)	☐	☐
Video recorder	☐	☐	Bluetooth	☐	☐
2 - 4.9 megapixel camera	☐	☐	SatNav/GPS (Global Positioning System)	☐	☐
5+ megapixel camera	☐	☐	Watch live television	☐	☐
Radio	☐	☐	Watch TV video clips	☐	☐
MP3 player	☐	☐	Internet voice calls (VOIP)	☐	☐
Downloadable games	☐	☐	Video calls	☐	☐
Built-in speaker	☐	☐	Expandable memory	☐	☐
Mobile internet access	☐	☐	3G	☐	☐
Mobile e-mail access	☐	☐			

MP6 How often do you currently use your mobile phone/device for the following …..?

Please cross (x) one box for each activity	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Making and receiving telephone calls	☐	☐	☐	☐	☐	☐	☐	☐
Text messaging	☐	☐	☐	☐	☐	☐	☐	☐
Receiving text alerts	☐	☐	☐	☐	☐	☐	☐	☐
Taking pictures/ video clips	☐	☐	☐	☐	☐	☐	☐	☐
Picture/ video messaging	☐	☐	☐	☐	☐	☐	☐	☐
Storing pictures/video clips	☐	☐	☐	☐	☐	☐	☐	☐
Uploading pictures/video clips to PC	☐	☐	☐	☐	☐	☐	☐	☐
Making/receiving video phone calls	☐	☐	☐	☐	☐	☐	☐	☐
Playing games	☐	☐	☐	☐	☐	☐	☐	☐
Listening to the radio	☐	☐	☐	☐	☐	☐	☐	☐
Listening to music	☐	☐	☐	☐	☐	☐	☐	☐
Accessing the internet	☐	☐	☐	☐	☐	☐	☐	☐
Looking at websites	☐	☐	☐	☐	☐	☐	☐	☐
Sending/ receiving e-mails	☐	☐	☐	☐	☐	☐	☐	☐
Internet voice calls (VOIP)	☐	☐	☐	☐	☐	☐	☐	☐
Looking at news and weather	☐	☐	☐	☐	☐	☐	☐	☐
Looking at sports headlines	☐	☐	☐	☐	☐	☐	☐	☐
Instant messaging	☐	☐	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each activity	Several times a day	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Accessing social networking/ community sites (e.g. Bebo, Facebook etc.)	☐	☐	☐	☐	☐	☐	☐	☐
Uploading content	☐	☐	☐	☐	☐	☐	☐	☐
Swapping content with friends / family	☐	☐	☐	☐	☐	☐	☐	☐
Searching for local information	☐	☐	☐	☐	☐	☐	☐	☐
Looking at information on travelling/ mapping	☐	☐	☐	☐	☐	☐	☐	☐
Looking at information on finance	☐	☐	☐	☐	☐	☐	☐	☐
Looking at information on entertainment	☐	☐	☐	☐	☐	☐	☐	☐
Looking at price comparison websites	☐	☐	☐	☐	☐	☐	☐	☐
Online shopping	☐	☐	☐	☐	☐	☐	☐	☐
Real time gambling	☐	☐	☐	☐	☐	☐	☐	☐
Downloading games	☐	☐	☐	☐	☐	☐	☐	☐
Downloading music	☐	☐	☐	☐	☐	☐	☐	☐
Downloading ring tones	☐	☐	☐	☐	☐	☐	☐	☐
Downloading podcasts	☐	☐	☐	☐	☐	☐	☐	☐
Downloading video clips	☐	☐	☐	☐	☐	☐	☐	☐
Watching films	☐	☐	☐	☐	☐	☐	☐	☐
Watching TV programmes	☐	☐	☐	☐	☐	☐	☐	☐
Downloading screen logos	☐	☐	☐	☐	☐	☐	☐	☐
Locating places using GPS	☐	☐	☐	☐	☐	☐	☐	☐
Walki Talki	☐	☐	☐	☐	☐	☐	☐	☐

MP7a Approximately how many text messages do you **send** in a day?

MP7b How many **personal** text messages do you **receive** in a day?

MP7c How many **commercial** text messages (advertising products or services) do you **receive** in a day?

Please cross (x) one box per column only	MP7a Send	MP7b Receive personal	MP7c Receive commercial
None	☐	☐	☐
Less than 1 a day	☐	☐	☐
1 or 2 a day	☐	☐	☐
3 to 5 a day	☐	☐	☐
6 to 10 a day	☐	☐	☐
More than 10 a day	☐	☐	☐

MP7d Approximately how many picture messages do you **send** in a day?

MP7e How many **personal** picture messages do you **receive** in a day?

MP7f How many **commercial picture** messages (advertising products or services) do you **receive** in a day?

Please cross (x) one box per column only	MP7d Send	MP7e Receive personal	MP7f Receive commercial
None	☐	☐	☐
Less than 1 a day	☐	☐	☐
1 or 2 a day	☐	☐	☐
3 to 5 a day	☐	☐	☐
6 to 10 a day	☐	☐	☐
More than 10 a day	☐	☐	☐

MP8 Here are some statements people have made about mobile phones. Please indicate how much you agree or disagree?

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I welcome receiving information on my mobile phone that's relevant to my immediate location	☐	☐	☐	☐	☐	☐
I increasingly use my mobile phone to visit social networking sites	☐	☐	☐	☐	☐	☐
I enjoy getting texts from organisations	☐	☐	☐	☐	☐	☐
I trust the advertising messages I receive on my mobile phone	☐	☐	☐	☐	☐	☐
I cannot imagine life without my mobile	☐	☐	☐	☐	☐	☐
I like recording programmes and then watching them on my mobile phone at a time that is convenient to me	☐	☐	☐	☐	☐	☐
I like having GPS mapping on my mobile phone	☐	☐	☐	☐	☐	☐
I would switch to another mobile phone service provider if I could get a better deal	☐	☐	☐	☐	☐	☐
I make sure that I have the most up-to-date handset on the market	☐	☐	☐	☐	☐	☐
I sometimes switch off my mobile phone to get some peace and quiet	☐	☐	☐	☐	☐	☐
Getting texts from organisations is intrusive	☐	☐	☐	☐	☐	☐
It really annoys me when people use their mobile phones in public	☐	☐	☐	☐	☐	☐
I ignore all commercial text messages I receive	☐	☐	☐	☐	☐	☐
I like the idea of using my mobile phone to access my e-mails or to surf the internet	☐	☐	☐	☐	☐	☐
I like the idea of video calling via my mobile phone	☐	☐	☐	☐	☐	☐
I like using Bluetooth	☐	☐	☐	☐	☐	☐
I often respond to advertising messages I receive on my mobile phone	☐	☐	☐	☐	☐	☐

SHOPPING

SH1 Thinking about when you do your regular household grocery shopping from supermarkets and food shops, would you say you personally select …..? ***Please cross (x) one box only***

- All or most items ☐
- About half ☐
- Less than half ☐
- Just a few items ☐
- None or almost none ☐

SH2 How often do you do your **main** grocery shopping? ***Please cross (x) one box only***

- Every day/most days ☐
- Several days a week ☐
- About once a week ☐
- A few times a month ☐
- About once a month ☐
- Less often ☐
- Never ☐

SH3a Which of the following supermarkets and food shops do you use **most often** to do your grocery shopping? ***Please cross (x) one box only***

SH3b And which others do you **ever** use? ***Please cross (x) all that apply***

SH3c **How often** would you say you tend to shop at each of the following? ***Please cross (x) one box per row only***

	SH3a	SH3b	SH3c						
	Most Often	Ever use	Shop at every day	Several days a week	About once a week	A few times a month	About once a month	Less Often	Never
Aldi	☐	☐	☐	☐	☐	☐	☐	☐	☐
Asda	☐	☐	☐	☐	☐	☐	☐	☐	☐
Budgens	☐	☐	☐	☐	☐	☐	☐	☐	☐
Co-op	☐	☐	☐	☐	☐	☐	☐	☐	☐
Costcutter	☐	☐	☐	☐	☐	☐	☐	☐	☐
Food Giant	☐	☐	☐	☐	☐	☐	☐	☐	☐
Iceland	☐	☐	☐	☐	☐	☐	☐	☐	☐
Leo's	☐	☐	☐	☐	☐	☐	☐	☐	☐
Lidl	☐	☐	☐	☐	☐	☐	☐	☐	☐
Londis	☐	☐	☐	☐	☐	☐	☐	☐	☐
Lo-Cost	☐	☐	☐	☐	☐	☐	☐	☐	☐
Marks & Spencer food	☐	☐	☐	☐	☐	☐	☐	☐	☐
Morrisons	☐	☐	☐	☐	☐	☐	☐	☐	☐
Netto	☐	☐	☐	☐	☐	☐	☐	☐	☐
Sainsbury's	☐	☐	☐	☐	☐	☐	☐	☐	☐
Somerfield	☐	☐	☐	☐	☐	☐	☐	☐	☐
Spar	☐	☐	☐	☐	☐	☐	☐	☐	☐
Tesco	☐	☐	☐	☐	☐	☐	☐	☐	☐
VG	☐	☐	☐	☐	☐	☐	☐	☐	☐
Waitrose	☐	☐	☐	☐	☐	☐	☐	☐	☐
Local independent shop	☐	☐	☐	☐	☐	☐	☐	☐	☐
Farmers' market / farmer's shop	☐	☐	☐	☐	☐	☐	☐	☐	☐
Organic food shop	☐	☐	☐	☐	☐	☐	☐	☐	☐
Organic food delivery	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐	☐	☐	☐	☐
Online Shopping (grocery)									
Asda at home	☐	☐	☐	☐	☐	☐	☐	☐	☐
Ocado	☐	☐	☐	☐	☐	☐	☐	☐	☐
Sainsbury's to you	☐	☐	☐	☐	☐	☐	☐	☐	☐
Tesco.com	☐	☐	☐	☐	☐	☐	☐	☐	☐
Waitrose Deliver	☐	☐	☐	☐	☐	☐	☐	☐	☐
Iceland	☐	☐	☐	☐	☐	☐	☐	☐	☐

SH4a What is the main reason for shopping at the supermarket/food shop you use for your main shopping?

SH4b And what is the main reason for shopping at the supermarkets/food shop you use for your top up shopping?
Please cross (x) one box per row only

	Proximity	Store size	Price	Product offering	Car parking	24 hour shopping	Other
Main shop	☐	☐	☐	☐	☐	☐	☐
Top up shop	☐	☐	☐	☐	☐	☐	☐

SH5a How much would you say you personally spend for your household in an average week on food, drink and groceries?

SH5b And how much does your household spend in total in an average week on your food, drink and groceries?

Please cross (x) one box per column only	SH5a You	SH5b Household		SH5a You	SH5b Household
Up to £10	☐	☐	£71-£100	☐	☐
£11-£20	☐	☐	£101-£125	☐	☐
£21-£30	☐	☐	£126-£150	☐	☐
£31-£40	☐	☐	£151 -£199	☐	☐
£41-£50	☐	☐	£200 or more	☐	☐
£51-£70	☐	☐			

SH6a Which of these stores have you visited in the **past 4 weeks**? ***Please cross (x) all that apply***

Department / Fashion Stores						Chemists	
Argos	☐	House of Fraser	☐	Primark	☐	Boots	☐
Debenhams	☐	John Lewis	☐	Selfridges	☐	Superdrug	☐
Dorothy Perkins	☐	Marks & Spencer	☐	T J Hughes	☐	Lloyds Pharmacy	☐
Gap	☐	Matalan	☐	TK Maxx	☐	Savers	☐
H & M	☐	New Look	☐	Top Shop	☐	Other chemist	☐
Harrods	☐	Next	☐	Zara	☐		
Harvey Nichols	☐	Oasis	☐	Other department / fashion store	☐		

SH6b And which of these shopping centres or stores have you visited in the **past 3 months**? ***Please cross (x) all that apply***

Shopping Centres		Home Furnishing Stores		Electrical Stores		DIY Stores	
Bluewater (Kent)	☐	Allied Carpets	☐	Comet	☐	B&Q	☐
Brent Cross (London)	☐	Carpetright	☐	Currys/Currys.digital	☐	Focus/Do-it-all/ Homestyle	☐
Bull Ring (Birmingham)	☐	Carpetwise	☐	PC World	☐	Homebase	☐
Centre MK (Milton Keynes)	☐	FADS	☐	Powerhouse	☐	Jewson	☐
Lakeside (Thurrock)	☐	Harris Carpets	☐	Sony Centres	☐	Wickes	☐
Meadowhall (Sheffield)	☐	Harveys	☐	Other electrical store	☐	Other DIY store	☐
MetroCentre (Gateshead)	☐	Magnet	☐				
Cribbs Causeway (Bristol)	☐	Habitat	☐				
Braehead Centre (Glasgow)	☐	Heals	☐				
Trafford Centre (Manchester)	☐	IKEA	☐				
Westfield (London)	☐	DFS	☐				
Any discount / factory outlet	☐	Other home furnishing store	☐				

SH7a Do you **own** any of the following reward cards? ***Please cross (x) all that apply***

SH7b And how frequently do you **use** each one? ***Please cross (x) one box for each row***

	SH7a	SH7b						
	Own	Daily	A few times a week	About once a week	A few times a month	About once a month	Less often	Never
Nectar Card	☐	☐	☐	☐	☐	☐	☐	☐
Tesco Clubcard	☐	☐	☐	☐	☐	☐	☐	☐
Boots Advantage Card	☐	☐	☐	☐	☐	☐	☐	☐
Co-op Dividend Card	☐	☐	☐	☐	☐	☐	☐	☐
Morrisons Miles Card	☐	☐	☐	☐	☐	☐	☐	☐
Waterstone's Card	☐	☐	☐	☐	☐	☐	☐	☐
Cineworld Unlimited Card	☐	☐	☐	☐	☐	☐	☐	☐
Odeon Premiere Card	☐	☐	☐	☐	☐	☐	☐	☐
Air Miles	☐	☐	☐	☐	☐	☐	☐	☐

SH8 How often do you do the following? ***Please cross (x) one box for each row***

	Always	Usually	Sometimes	Never
Take free samples of products offered to you	☐	☐	☐	☐
Buy a product after taking a sample	☐	☐	☐	☐
Use a promotional voucher (e.g. money – off voucher)	☐	☐	☐	☐

SH9 Here are some statements people have made about shopping. Please indicate how much you agree or disagree?

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I am more likely to use a shop that offers me a loyalty scheme	☐	☐	☐	☐	☐	☐
I look for the lowest possible prices when I go shopping	☐	☐	☐	☐	☐	☐
I shop around to take advantage of special offers	☐	☐	☐	☐	☐	☐
I thoroughly research products before I buy them	☐	☐	☐	☐	☐	☐
Shop's own brand products are the same quality as well known brands	☐	☐	☐	☐	☐	☐
I am prepared to pay extra for a better quality of product or service	☐	☐	☐	☐	☐	☐
I make a shopping list before I go out and stick to it	☐	☐	☐	☐	☐	☐
At the end of the day, price is the most important factor for me when choosing a product or service	☐	☐	☐	☐	☐	☐
When I am shopping for groceries I often decide what to buy when I'm in the store	☐	☐	☐	☐	☐	☐
It is important to me which brand I buy	☐	☐	☐	☐	☐	☐
These days I do most of my shopping online	☐	☐	☐	☐	☐	☐

OUT OF HOME

TR1 When did you last travel using the following transport methods? ***Please cross (x) one box for each mode of transport***

	Yesterday	Within past week	Within past fortnight	Within past 4 weeks	1 - 3 months ago	3 - 6 months ago	6 - 12 months ago	Over a year ago	Never
Car	☐	☐	☐	☐	☐	☐	☐	☐	☐
Van / Lorry	☐	☐	☐	☐	☐	☐	☐	☐	☐
Motorcycle / Scooter	☐	☐	☐	☐	☐	☐	☐	☐	☐
Bus / tram	☐	☐	☐	☐	☐	☐	☐	☐	☐
Taxi / Minicab	☐	☐	☐	☐	☐	☐	☐	☐	☐
Underground	☐	☐	☐	☐	☐	☐	☐	☐	☐
Train	☐	☐	☐	☐	☐	☐	☐	☐	☐
Coach	☐	☐	☐	☐	☐	☐	☐	☐	☐
Aeroplane	☐	☐	☐	☐	☐	☐	☐	☐	☐
Bicycle	☐	☐	☐	☐	☐	☐	☐	☐	☐
On foot	☐	☐	☐	☐	☐	☐	☐	☐	☐

TR2 When you travel on an average **day**, what method of transport do you use for each type of trip?

Please cross (x) all that apply	Car	Van / Lorry	Motorcycle / Scooter	Bus / Tram	Taxi / Minicab	Underground	Train	Bicycle	Coach	On Foot
To get to/from work	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
To visit family & friends	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
To go on an outing	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
To shop	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
To collect/drop off children	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

TR3 How many cars do you have in your household ***Please cross (x) one box only***

None ☐ 1 ☐ 2 ☐ 3+ ☐

TR4 How many return flights have you taken in the past 12 months from British airports for holiday, pleasure or business?
Please cross (x) one box in each row

	None	1 – 2 return flights	3 – 4 return flights	5 - 6 return flights	7 – 8 return flights	9 – 10 return flights	11 or more return flights
Business to other British airports	☐	☐	☐	☐	☐	☐	☐
Business to European airports	☐	☐	☐	☐	☐	☐	☐
Business to other destinations	☐	☐	☐	☐	☐	☐	☐
Holiday/pleasure to other British airports	☐	☐	☐	☐	☐	☐	☐
Holiday/pleasure to European airports	☐	☐	☐	☐	☐	☐	☐
Holiday/pleasure to other destinations	☐	☐	☐	☐	☐	☐	☐

TR5 Which UK airports have you flown to/from in the past 12 months for business and for holiday/pleasure?

Please cross (x) all that apply

	Holiday/ pleasure	Business		Holiday/ pleasure	Business
Aberdeen	☐	☐	London Gatwick	☐	☐
Birmingham	☐	☐	London Heathrow	☐	☐
East Midlands	☐	☐	London Stansted	☐	☐
Bristol	☐	☐	Luton	☐	☐
Edinburgh	☐	☐	Manchester	☐	☐
Glasgow	☐	☐	Newcastle	☐	☐
Liverpool	☐	☐	Any other	☐	☐
London City	☐	☐			

TR6 Thinking of all the places you see advertising outdoors, can you tell me when you last saw the following types of posters?

	Please cross (x) one box per row	Seen in past 24 hours	Seen in past week	Seen in past month	Longer ago	Never seen
Large Posters	Billboards (at side of road)	☐	☐	☐	☐	☐
	Banners (on buildings)	☐	☐	☐	☐	☐
Small Posters	Outside of phone boxes	☐	☐	☐	☐	☐
	Bus stops/shelters	☐	☐	☐	☐	☐
	Small posters in high street/pedestrian areas	☐	☐	☐	☐	☐
Underground	Small posters in underground stations	☐	☐	☐	☐	☐
	Posters on escalators	☐	☐	☐	☐	☐
	Large posters opposite tube platform	☐	☐	☐	☐	☐
	Posters in tube carriages	☐	☐	☐	☐	☐
Train	Large posters at overground train stations	☐	☐	☐	☐	☐
	Small posters at overground train stations	☐	☐	☐	☐	☐
Bus	Posters on the outside of buses	☐	☐	☐	☐	☐
Other Posters	Posters outside supermarkets	☐	☐	☐	☐	☐
	Posters in airports	☐	☐	☐	☐	☐
	Posters in gyms/leisure centres	☐	☐	☐	☐	☐
	Posters in cinema foyers	☐	☐	☐	☐	☐
	Posters in pubs/bars	☐	☐	☐	☐	☐
	Posters in toilets/washrooms	☐	☐	☐	☐	☐
Digital Screens	Large digital screens on the side of road	☐	☐	☐	☐	☐
	Large digital screens in overground train stations	☐	☐	☐	☐	☐
	Small digital screens on escalators in underground stations	☐	☐	☐	☐	☐
	Large projections across platforms of underground tube stations	☐	☐	☐	☐	☐
	Digital screens in airports	☐	☐	☐	☐	☐
	Digital screens in shopping centres	☐	☐	☐	☐	☐
	Small digital screens in hospitals	☐	☐	☐	☐	☐
	Small digital screens in Doctors' surgeries	☐	☐	☐	☐	☐
	Small digital screens in chemists' shops	☐	☐	☐	☐	☐
	Digital screens in cinema foyers	☐	☐	☐	☐	☐

TR7 Here are some statements people have made about outdoor advertising (that is billboards, posters and advertising on buses, bus shelters, taxis etc). Please indicate how much you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
Outdoor advertising gives me something to look at whilst I'm travelling	☐	☐	☐	☐	☐	☐
There is too much advertising outdoors	☐	☐	☐	☐	☐	☐
I find outdoor advertising informative	☐	☐	☐	☐	☐	☐
There are often brands advertised on posters that are not relevant to me	☐	☐	☐	☐	☐	☐
My regular journeys seem to take more time these days	☐	☐	☐	☐	☐	☐
Posters can brighten up the local environment	☐	☐	☐	☐	☐	☐
I tend to see the same billboard every time on my usual daily journey	☐	☐	☐	☐	☐	☐
I spend more time out of home than I used to	☐	☐	☐	☐	☐	☐
I see more types of brands advertising on posters these days	☐	☐	☐	☐	☐	☐
I trust the advertising I see on posters	☐	☐	☐	☐	☐	☐
I like watching the news on big digital screens in public places	☐	☐	☐	☐	☐	☐

YOUR VIEWS & OPINIONS

VO1a Which of these product categories do you follow closely for new products, new styles, new brands and/or companies, etc.?

VO1b And for which of these product categories do you frequently give advice, suggestions and ideas to other people, such as your friends and family?

Please cross (x) all that apply	VO1a Follow closely	VO1b Give advice/ suggestions on		VO1a Follow closely	VO1b Give advice/ suggestions on
Food and dining	☐	☐	Home decoration/DIY	☐	☐
Sport and hobbies	☐	☐	Cars	☐	☐
Entertainment and media	☐	☐	Financial services	☐	☐
Holidays and travel	☐	☐	Shops and shopping centres	☐	☐
Mobile phones	☐	☐	Children's products	☐	☐
Computers/computer software	☐	☐	Everyday household products	☐	☐
TV, DVD and audio equipment	☐	☐	Gardening	☐	☐
Clothes and accessories	☐	☐	Jobs and careers	☐	☐
Beauty/grooming products	☐	☐	The environment	☐	☐
Health products	☐	☐	Public affairs/politics	☐	☐
Home appliances (e.g. washing machines, microwaves etc)	☐	☐	None of the above	☐	☐

VO2 For each of the following, please tell me about how many people there are in your life who you communicate with fairly often... ***Please cross (x) one box in each row***

	0	1	2	3	4	5 - 9	10+
Relatives and family members who live outside your household	☐	☐	☐	☐	☐	☐	☐
Very close friends, not counting family members	☐	☐	☐	☐	☐	☐	☐
Neighbours and acquaintances, not including close friends or family	☐	☐	☐	☐	☐	☐	☐

VO3 And about how many clubs, social or professional organisations, or community groups do you personally belong to? ***Please cross (x) one box only***

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5-9 ☐ 10+ ☐

VO4 Here are some statements people have made about different aspects of life. Once again, please indicate the extent to which you agree or disagree.

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I like companies that involve themselves in the local community	☐	☐	☐	☐	☐	☐
If a company or brand lets me down in some way, I will make a point of telling my friends about it	☐	☐	☐	☐	☐	☐
I am always on the look out for new technology that will help or entertain me	☐	☐	☐	☐	☐	☐
I always seem to be the first in my group to have the latest thing	☐	☐	☐	☐	☐	☐
How a product works is more important to me than how it looks	☐	☐	☐	☐	☐	☐
If a company or brand impresses me in some way, I will make a point of telling my friends about it	☐	☐	☐	☐	☐	☐
Friends ask my advice on new products or brands	☐	☐	☐	☐	☐	☐
I/my partner enjoy cooking	☐	☐	☐	☐	☐	☐
I always read the labels on packaging before I buy food	☐	☐	☐	☐	☐	☐
I stop buying products and brands that are involved in health scares	☐	☐	☐	☐	☐	☐
I am always watching my weight	☐	☐	☐	☐	☐	☐
I rely heavily on convenience products to make cooking simple / quick	☐	☐	☐	☐	☐	☐
I would never buy food that has been genetically modified	☐	☐	☐	☐	☐	☐
I like a traditional Sunday lunch at home	☐	☐	☐	☐	☐	☐
My diet is mainly vegetarian	☐	☐	☐	☐	☐	☐
I like to keep fit	☐	☐	☐	☐	☐	☐
I regard myself as a connoisseur of food and wine	☐	☐	☐	☐	☐	☐
I look out for the 'healthy' food products	☐	☐	☐	☐	☐	☐
I am feeling more stressed these days	☐	☐	☐	☐	☐	☐
I sometimes bend the rules if I know I can get away with it	☐	☐	☐	☐	☐	☐
I often do things on the spur of the moment	☐	☐	☐	☐	☐	☐
I like to follow a well organised routine	☐	☐	☐	☐	☐	☐
There is little I can do to change my life	☐	☐	☐	☐	☐	☐
I make time for my own needs	☐	☐	☐	☐	☐	☐
I want to get to the very top in my career	☐	☐	☐	☐	☐	☐
I prefer to be active in my leisure time	☐	☐	☐	☐	☐	☐
There are not enough hours in the day to do all the things that I want to do	☐	☐	☐	☐	☐	☐
I like to enjoy life and don't worry about the future	☐	☐	☐	☐	☐	☐
I hate my job	☐	☐	☐	☐	☐	☐
My work is a career not just a job	☐	☐	☐	☐	☐	☐
I enjoy spending time with my family	☐	☐	☐	☐	☐	☐
If I want something expensive, I'd rather save up for it than put it on my credit card	☐	☐	☐	☐	☐	☐
I like taking risks	☐	☐	☐	☐	☐	☐
I am optimistic about life	☐	☐	☐	☐	☐	☐
I work longer hours these days	☐	☐	☐	☐	☐	☐
I always discuss major decisions with my partner	☐	☐	☐	☐	☐	☐
I have a keen sense of adventure	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
I find it hard to find time to relax	☐	☐	☐	☐	☐	☐
I try to buy local produce whenever I can	☐	☐	☐	☐	☐	☐
I like to get out to the countryside whenever I can	☐	☐	☐	☐	☐	☐
Low carbon emissions would be high on my list of 'must haves' if I were to buy a new car	☐	☐	☐	☐	☐	☐
I am trying to buy more fair trade products	☐	☐	☐	☐	☐	☐
I am very concerned about the impact of human activity on the climate/environment	☐	☐	☐	☐	☐	☐
What I do in my life doesn't make any real difference to the environment	☐	☐	☐	☐	☐	☐
I make a real effort to recycle waste	☐	☐	☐	☐	☐	☐
I am willing to spend money to save time	☐	☐	☐	☐	☐	☐
I enjoy watching ads with my favourite celebrities	☐	☐	☐	☐	☐	☐
If I had the technology, I would stop watching advertising	☐	☐	☐	☐	☐	☐
I often talk about ads with friends and colleagues	☐	☐	☐	☐	☐	☐
I only have time for advertising if it's relevant to me	☐	☐	☐	☐	☐	☐
I like interactive ads	☐	☐	☐	☐	☐	☐
Advertising helps me find out what products are available	☐	☐	☐	☐	☐	☐
I am really worried that we are becoming a surveillance society	☐	☐	☐	☐	☐	☐
I am active in local debates	☐	☐	☐	☐	☐	☐
I couldn't deal with a company that I didn't trust	☐	☐	☐	☐	☐	☐
I am willing to try new products from companies that I trust, even if it is in an area in which they have no previous experience	☐	☐	☐	☐	☐	☐
I couldn't live without my computer	☐	☐	☐	☐	☐	☐
Computers confuse me, I'll never get used to them	☐	☐	☐	☐	☐	☐
I like to keep up with new technology	☐	☐	☐	☐	☐	☐
I like different people, cultures, ideas and lifestyles around me	☐	☐	☐	☐	☐	☐
I see education as an investment in my life	☐	☐	☐	☐	☐	☐
The way I look is extremely important to me	☐	☐	☐	☐	☐	☐
I am no good at saving money	☐	☐	☐	☐	☐	☐
Money is the best measure of success	☐	☐	☐	☐	☐	☐
I like to keep up with the latest fashion	☐	☐	☐	☐	☐	☐
I consider myself interested in the arts	☐	☐	☐	☐	☐	☐
I don't mind giving advertisers my personal data if they use it to give me a relevant offer	☐	☐	☐	☐	☐	☐
Sometimes I think I drink too much alcohol	☐	☐	☐	☐	☐	☐
Rules are there to be broken	☐	☐	☐	☐	☐	☐
I find advertisements that have web addresses, phone numbers or SMS text numbers useful	☐	☐	☐	☐	☐	☐
I care about environmental issues and take them into account in my personal life	☐	☐	☐	☐	☐	☐
The government is spending too much money on the 2012 Olympics	☐	☐	☐	☐	☐	☐
The UK is worse off than other European countries because of the recession	☐	☐	☐	☐	☐	☐
I have tightened my belt significantly in terms of what I spend on different things	☐	☐	☐	☐	☐	☐
I am coping on my current income	☐	☐	☐	☐	☐	☐

Please cross (x) one box for each statement	Definitely agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Definitely disagree	Don't know/Not applicable
To succeed at work you need to keep improving your knowledge and skills	☐	☐	☐	☐	☐	☐
I am interested in knowing my credit score	☐	☐	☐	☐	☐	☐

VO5 Thinking about **all** types of advertising – on television, in newspapers and magazines, or posters, on the radio, at the cinema, etc. Which of the following statements best describes how you feel about advertising in general?
Please cross (x) one box only.

Very Favourable	Fairly Favourable	Neither Favourable nor Unfavourable	Fairly Unfavourable	Very Unfavourable	Don't know
☐	☐	☐	☐	☐	☐

PERSONAL INFORMATION

PI1 Are you…? ***Please cross (x) one box only***

Male ☐ Female ☐

PI2 How old are you…? ***Please write in the box below***

☐☐

PI3 Which of the following statements best describes your current stage in life? ***Please cross (x) one box only***

I am living in my parents' home ☐
I am living in my own home without a partner ☐
I am living in my own home with a partner ☐
I am sharing a home with flatmates ☐
I am sharing a home with tenants/lodgers ☐
Other ☐

PI4 Are you …? ***Please cross (x) one box only***

Single ☐
Married/Civil partnership/Living with partner ☐
Widowed ☐
Divorced/Separated ☐

PI5 How many people are there living in your household, including yourself? ***Please cross (x) one box only***

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 or more ☐

PI6 How many **adults** are there living in your household, including yourself? ***Please cross (x) one box only***

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 or more ☐

PI7 Are you a parent or guardian?

Yes ☐ No ☐

PI8 Are there children in your household …? ***Please cross (x) all that apply***

No children ☐
Children aged under 1 year ☐
Children aged 1-3 years ☐
Children aged 4-9 years ☐
Children aged 10-15 years ☐

PI9 When did you finish your full-time education? ***Please cross (x) one box only***

Still studying ☐
16 and under ☐
Age 17 ☐
Age 18 ☐
Age 19 ☐
Age 20 ☐
Age 21 or over ☐

PI10 Which, if any, is the highest educational or professional qualification you have obtained? ***Please cross (x) one box only***

- GCSE/O-Level/CSE ☐
- Vocational qualifications ☐
- A-Level or equivalent ☐
- Bachelor Degree or equivalent ☐
- Masters/PhD or equivalent ☐
- Other professional qualification ☐
- No formal qualifications ☐
- Still studying ☐

PI11 Are you …? ***Please cross (x) one box only***

- Working full time (30+ hours per week) ☐
- Working part time (8-29 hours per week) ☐
- Working part time (under 8 hours per week) ☐
- Unemployed ☐
- Retired ☐
- Not employed (incl. housewife/househusband) ☐
- Student or child ☐

PI12 If you are unemployed or retired, when were you last in full time employment? ***Please cross (x) one box only***

- Within the past 3 months ☐
- 3-6 months ago ☐
- Within the past 6-12 months ☐
- Longer ago ☐

PI13 If you are unemployed or retired, do you have an income other than, or in addition to, the state benefit or state pension? ***Please cross (x) one box only***

- Yes ☐
- No ☐

IF YOU ARE CURRENTLY WORKING – PLEASE CONTINUE TO PI14

IF YOU ARE NOT CURRENTLY WORKING – PLEASE SKIP TO PI21 (PAGE 53)

PI14 What type of organisation do you work for? ***Please give as much detail as possible***

PI15 What is the job that you actually do? ***Please give as much detail as possible rather than just your job title***

PI16 Which one of these best describes your position at work? ***Please cross (x) one box only***

- Senior Director (i.e. Chairman, MD, Board Member, Company Secretary) ☐
- Intermediate Director/Manager ☐
- Junior Manager ☐
- Professional (i.e. doctor or solicitor) ☐
- Clerical / Officer worker ☐
- Shop Worker ☐
- Skilled Manual Worker ☐
- Semi-skilled Manual Worker ☐
- Unskilled Manual Worker ☐
- I work for myself / self-employed ☐

PI17 Which, if any, of the following apply to you? ***Please cross (x) all that apply***

- I am responsible for purchasing decisions at work ☐
- I am responsible for hiring employees ☐

PI18 How many people, including yourself, are employed in the UK by the organisation for which you work? ***Please cross (x) one box only***

1-9 ☐	100-149 ☐	250-299 ☐	1,000-4,999 ☐
10-24 ☐	150-199 ☐	300-499 ☐	5,000-9,999 ☐
25-49 ☐	200-249 ☐	500-999 ☐	10,000 or more ☐
50-99 ☐			

PI19 How many employees are you personally responsible for?

☐☐☐☐

PI20 How often do you work from home? ***Please cross (x) one box only***

5 or more days a week ☐	1 day a week ☐
3-4 days a week ☐	Less often ☐
2 days a week ☐	Never work from home ☐

PI21 Are you the chief income earner in your household? That is the person with the largest income, whether from employment, pensions, state benefits, investment or any other sources. ***Please cross (x) one box only***

Yes ☐ SKIP TO PI31 (PAGE 54) No ☐ CONTINUE TO PI22

IF YOU ARE THE CHIEF INCOME EARNER IN YOUR HOUSEHOLD – SKIP TO PI31 (PAGE 54)

IF YOU ARE NOT THE CHIEF INCOME EARNER, PLEASE ANSWER PI22 TO PI30 FOR THE CHIEF INCOME EARNER IN YOUR HOUSEHOLD.

PI22 Is the chief income earner …? ***Please cross (x) one box only***

Working full time (30+ hours per week) ☐	Retired ☐
Working part time (8-29 hours per week) ☐	Not employed (incl. housewife/househusband) ☐
Working part time (under 8 hours per week) ☐	Student or child ☐
Unemployed ☐	

PI23 If the chief income earner is unemployed or retired, when was he/she last in full time employment? ***Please cross (x) one box only***

Within the past 3 months ☐	Within the past 6-12 months ☐
3-6 months ago ☐	Longer ago ☐

PI24 If the chief income earner is unemployed or retired, does he/she have an income other than, or in addition to, the state benefit or state pension? ***Please cross (x) one box only***

Yes ☐ No ☐

IF THE CHIEF INCOME EARNER IS CURRENTLY WORKING – PLEASE ANSWER ABOUT THEIR CURRENT JOB

IF THE CHIEF INCOME EARNER IS UNEMPLOYED OR RETIRED – PLEASE ANSWER ABOUT THEIR PREVIOUS JOB

IF THE CHIEF INCOME EARNER IS NOT EMPLOYED OR STUDYING – PLEASE SKIP TO PI30 (PAGE 54)

PI25 What type of organisation does the chief income earner in your household work for? ***Please give as much detail as possible***

PI26 What is the job that the chief income earner in your household actually does? ***Please give as much detail as possible rather than just the job title***

PI27 Which one of these best describes the position at work of the chief income earner? ***Please cross (x) one box only***

- Senior Director (i.e. Chairman, MD, Board Member, Company Secretary) ☐
- Intermediate Director/Manager ☐
- Junior Manager ☐
- Professional (i.e. doctor or solicitor) ☐
- Clerical / Officer worker ☐
- Shop Worker ☐
- Skilled Manual Worker ☐
- Semi-skilled Manual Worker ☐
- Unskilled Manual Worker ☐
- Self-employed ☐

PI28 How many people, are employed in the UK by the organisation for which the chief income earner works? ***Please cross (x) one box only***

- 1-9 ☐
- 10-24 ☐
- 25-49 ☐
- 50-99 ☐
- 100-149 ☐
- 150-199 ☐
- 200-249 ☐
- 250-299 ☐
- 300-499 ☐
- 500-999 ☐
- 1,000-4,999 ☐
- 5,000-9,999 ☐
- 10,000 or more ☐

PI29 How many employees is the chief income earner in your household personally responsible for?

☐☐☐☐

PI30 Which, if any, is the highest educational or professional qualification that the chief income earner in your household has obtained? ***Please cross (x) one box only***

- GCSE/O-Level/CSE ☐
- Vocational qualifications ☐
- A-Level or equivalent ☐
- Bachelor Degree or equivalent ☐
- Masters/PhD or equivalent ☐
- Other professional qualification ☐
- No formal qualifications ☐
- Still studying ☐

ALL - PLEASE NOW ANSWER FOLLOWING QUESTIONS

PI31 What best describes your ethnic origin? ***Please cross (x) one box only***

White
- White - British ☐
- White - Irish ☐
- White - Central/ Eastern European ☐
- Any other White background ☐

Mixed
- Mixed - White and Black Caribbean ☐
- Mixed - White and Black African ☐
- Mixed - White and Asian ☐
- Mixed – White and Chinese ☐
- Any other Mixed background ☐

Black or Black British
- Caribbean ☐
- African ☐
- Any other Black background ☐

Asian or Asian British
- Indian ☐
- Pakistani ☐
- Bangladeshi ☐
- Any other Asian background ☐

Chinese or Other Ethnic Background
- Chinese ☐
- Any other ethnic background ☐

PI32 How long have you lived in the UK for? ***Please cross (x) one box only***

All my life / born in UK	☐	3 to 5 years	☐	21 to 30 years	☐
Less than 6 months	☐	6 to 10 years	☐	31 to 40 years	☐
6 months to 1 year	☐	11 to 15 years	☐	41 to 50 years	☐
1 to 2 years	☐	16 to 20 years	☐	More than 50 years	☐

PI33 What, if any, is your religion? ***Please cross (x) one box only***

Church of England	☐	Buddhist	☐	Jewish	☐
Protestant	☐	Hindu	☐	Any other religion	☐
Catholic	☐	Muslim	☐	None	☐
Other Christian denomination	☐	Sikh	☐		

PI34 Are you registered as disabled?

Yes ☐ No ☐

PI35 Are you, or is someone in your household, receiving any of the following benefits?

Please cross (x) all that apply	**Personally**	**Someone in the household**
Income support	☐	☐
Jobseeker's allowance	☐	☐
Incapacity benefit	☐	☐
Council tax benefit	☐	☐

PI36 Which of these ranges comes closest to the total annual income of the **whole of your household**, before anything is deducted for tax, National Insurance, pension schemes etc.? ***Please cross (x) one box only***

Up to £5,000	☐	£15,000 - £19,999	☐	£35,000 - £44,999	☐	£75,000 - £99,999	☐
£5,000 - £9,999	☐	£20,000 - £24,999	☐	£45,000 - £54,999	☐	£100,000 or more	☐
£10,000 - £14,999	☐	£25,000 - £34,999	☐	£55,000 - £74,999	☐		

PI37 Do you smoke cigarettes, rolling tobacco, cigars or a pipe?

Yes ☐ No ☐

PI38 Are you planning to do any of the following over the next 12 months? ***Please cross (x) all that apply***

Move out of parents' home	☐	Change jobs	☐	Retire	☐
Start living with partner/spouse	☐	Quit Smoking	☐	Spend more than £2,000 on home improvements	☐
Get married	☐	Change Career	☐	Take out investments/increase savings	☐
Have a baby/another baby	☐	Take out a new mortgage	☐	Consolidate debts/re-mortgage	☐
Rent a house/flat	☐	Reduce my carbon footprint	☐	Buy a brand new car	☐
Buy a house/flat	☐	Retraining	☐	Undertake cosmetic surgery	☐
Take a sabbatical	☐	Developing new life skills	☐	Get fit	☐
Start studying	☐	Start a business	☐	Increase my recycling	☐
Finish studying	☐	Live/work abroad	☐	None of the above	☐

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY

Please return your completed questionnaire and your completed diary in the free post envelopes provided

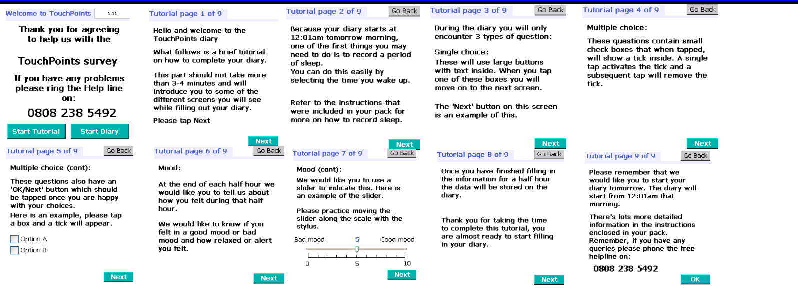
If you need another freepost envelope please call us free on

0808 238 5492

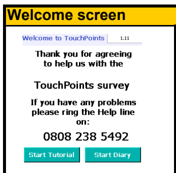
or e-mail us at
touchpoints@ipsos.com

Ipsos MORI, Kings House, Kymberley Road, Harrow, HA1 1PT

PDA Tutorial



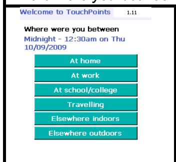
Welcome screen



Thank you for agreeing to help us with the TouchPoints Survey.
If you have any problems please ring the helpline on 0808 238 5492

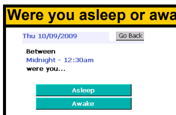
Where were you?

Where were you between…



- At home
- At work
- At school/college
- Travelling
- Elsewhere indoors
- Elsewhere outdoors

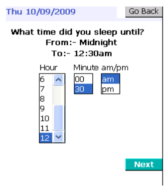
Were you asleep or awake



Asleep

Awake

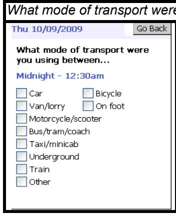
Asleep *(At Home or Elsewhere Indoors)*



What time did you sleep until?

What mode of transport were you using?

What mode of transport were you using between…



- Car
- Van/Lorry
- Motorcycle/Scooter
- Bus/Tram/Coach
- Taxi/Minicab
- Underground
- Train
- Bicycle
- On foot
- Other

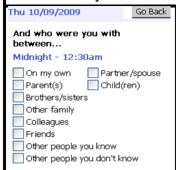
Reason for travel

What was the reason for travelling between…

- Commuting to/from work
- Visiting friends/family
- Collecting/dropping off children
- Going out socially
- Going for a day out
- Going shopping - groceries
- Going shopping - other
- Just getting out and about

Who were you with?

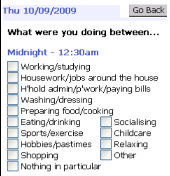
And who were you with between…



On my own
Partner/spouse
Parent(s)
Child(ren)
Brothers/sisters
Other family
Colleagues
Friends
Other people you know
Other people you don't know

What were you doing?

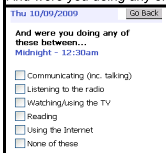
What were you doing between…



Working/studying
Housework/jobs around the house
H'hold admin/p'work/paying bills
Washing/dressing
Preparing food/cooking
Eating/drinking
Sports/exercise
Hobbies/pastimes
Shopping
Socialising
Childcare
Relaxing
Nothing in particular
Other

And were you doing any of these?

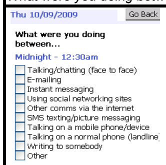
And were you doing any of these between…



Communicating (inc talking)
Listening to the radio
Watching/using the TV
Reading
Using the Internet
None of these

Communicating (inc talking)

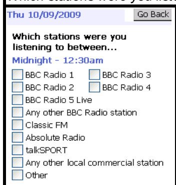
What were you doing between…



Talking/chatting (face to face)
E-mailing
Instant messaging
Using social networking sites
Other comms via the internet
SMS texting / picture messaging
Talking on a mobile phone / device
Talking on a normal phone (landline)
Writing to somebody
Other

Listening to the radio

Which stations were you listening to between…



BBC Radio 1
BBC Radio 2
BBC Radio 3
BBC Radio 4
BBC Radio 5 Live
Any other BBC Radio station
Classic FM
Absolute Radio
Talksport
Any other local commercial station
Other

Watching/Using the TV

Which TV channels were you watching between…

BBC1
BBC2
ITV1
Channel 4/S4C
Five
Digital only channels
Watching pre-rec DVD/Blu-ray/Video
Using a games console
Other

Type of channel watched

What type of digital channel/s were you…

Sport
Movies
Entertainment
News/current affairs
Children's TV
Home/DIY/gardening/cooking
History/documentary/nature
Music
Game show
Reality TV
Shopping
Other

Reading

What were you reading between…

Daily newspaper
Sunday newspaper
Weekly newspaper (paid for)
Weekly newspaper (free)
Weekly magazine
Monthly magazine
Book
Other

Daily newspapers

What were you reading between…

Daily Express
Daily Mail
Metro (free)
Daily Mirror/ Daily Record
Daily Sport
Daily Star
The Sun
The Daily Telegraph
Financial Times
The Guardian
The Independent
The Times
Any regional/local paid for paper
Any regional/local free paper
Other

Sunday newspapers

What were you reading between…

The Mail on Sunday
Sunday Express
Daily Star Sunday
News of the World
The People
Sunday Mirror
Sunday Sport
The Independent on Sunday
The Observer
The Sunday Telegraph
The Sunday Times
Regional/local Sunday paper
Other

Weekly magazines

What weekly magazines were you reading between…

TV listings
News/current affairs
Gossip/celebrity
Fashion/lifestyle/beauty
Home/gardening
Music/film
Computing/technology
Motoring/motorcycles
Men's lifestyle
Sport
Other

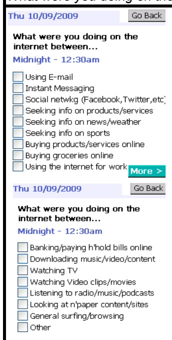
Monthly magazines

What monthly magazines were you reading between…

TV listings
News/current affairs
Gossip/celebrity
Fashion/lifestyle/beauty
Home/gardening
Music/film
Computing/technology
Motoring/motorcycles
Men's lifestyle
Sport
Other

What were you doing on the Internet

What were you doing on the internet between…



Using E-mail
Instant Messaging
Social netwkg (Facebook, Twitter etc.)
Seeking info on products/services
Seeking info on news/weather
Seeking info on sports
Buying products/services online
Buying groceries online
Using the internet for work
Banking/paying h'hold bills online
Downloading music/video/other content
Watching TV
Watching video clips/movies
Listening to radio/music/podcasts
Looking at n'paper content/sites
General surfing/browsing
Other

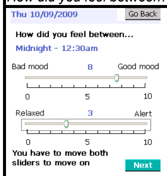
And finally, can I check if you were doing any of these … (Asked if only one media activity coded)

Can I just check whether you were also doing any of these between…

Communicating (inc talking)
Listening to the radio
Watching/using the TV
Reading
Using the Internet
None of these

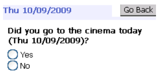
How did you feel?

How did you feel between…

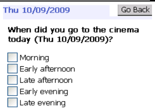


Mood Scale on a slider
Bad Mood <----------------> Good Mood
Relaxed <----------------> Alert
[With 0 to 10 numeric scale; Keep button in same place]

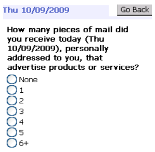
Direct mail etc. (only once per day - at the 9pm-930pm timeslot)



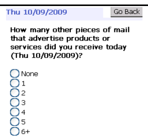
Did you go to the cinema today (dayXX & dateXX)?
[Yes, No]



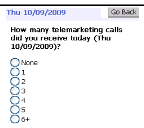
If went to cinema today:
When did you go to the cinema today (dayXX & dateXX)?
[Morning, Early afternoon, Late afternoon, Early evening, Late evening]



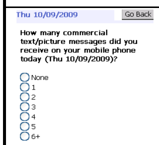
How many pieces of mail did you receive today (dayXX & dateXX), personally addressed to you, that advertise products or services?
[None, 1, 2, 3, 4, 5, 6+]



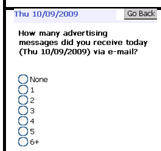
How many other pieces of mail that advertise products or services did you receive today (dayXX & dateXX)?
[None, 1, 2, 3, 4, 5, 6+]



How many telemarketing calls did you receive today (dayXX & dateXX)?
[None, 1, 2, 3, 4, 5, 6+]

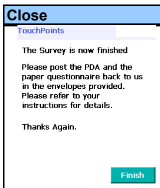


How many commercial text/picture messages did you receive on your mobile phone today (dayXX & dateXX)?
[None, 1, 2, 3, 4, 5, 6+]



How many advertising messages did you receive today (dayXX & dateXX) via e-mail?
[None, 1, 2, 3, 4, 5, 6+]

Close



The Survey is now finished

Please post the PDA and the paper questionnaire back to us in the envelopes provided.
Please refer to your instructions for details.

Thanks Again

Appendix 3: Channels measured and planning inputs

Channel	Media	Planning Inputs
Television	30 commercial channels plus 7 BBC channels (non-commercial)	TVRs by day part (9 segments), channel grouping, or by genre
Radio	58 national and regional commercial stations plus 21 BBC stations (non commercial)	GRPs by day part (6 segments) and radio group (group by sales house)
Print	All titles measured by the National Readership Survey	Number of insertions by title
Regional Press	Titles as measured by JICREG	Number of insertion per title
Online	• 50 individual websites (including sites of major newspapers and TV channels, social sites, e-commerce sites) • 40 site genres (including auction, banking, dating, travel/maps, government, price comparison, sports, women's, news, music etc)	GRPs by website or site genre
Search	AOL, Ask, Google, MSN, Yahoo	30 product search categories (e.g. books/CDs, groceries, toys, consumer electronics, holidays, health & beauty, sports equipment)
Sponsorship	15 major sporting events in the UK (football, tennis, rugby, Formula 1, racing)	TV viewing of individual event, attention rage at individual event
Outdoor		GRPs by poster size (6/48/96 sheets)
Cinema		Admissions by contractor
Direct Mail		Percentage of households in target market expected to receive/open direct mail
SMS Text		Percentage of mobile phone owners within a particular geodemographic group that will be sent a commercial text message
Regionality		Standard ISBA marketing regions (12)
Costs		Est. of adult CPM provided by the World Advertising Research Centre (WARC)

Appendix 4:

TouchPoints Fusion Assessment (Ken Baker)

Development of the TouchPoints Planning Database

An Appraisal

Prepared for the IPA

Prepared by:

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Ickenham
Middlesex
UB108LT

Table of Contents

Introduction

The IPA TouchPoints Planning Database is the most ambitious attempt at media data integration ever undertaken in the UK. Between March and September 2005 some 5010 respondent panellists were recruited to record by electronic diary (PDA) their activities for a week-what they were doing, who they were with, and what media they were using on a half hourly basis. In addition, a substantial contact questionnaire was collected, covering detailed usage and attitudes to TV, Radio, Press, Outdoor, Cinema, Online, SMS, Event sponsorship and direct marketing. A wide range of lifestyle, attitudinal and detailed shopping questions were also included. The data collected by these two methods is known as the TouchPoints Hub Survey, and as well as providing a comprehensive database for studying the social habits of GB residents, it's major purpose was to assist in the creation of an integrated media database, firstly by fusion of BARB,RAJAR and NRS into the Hub Survey, and secondly, via modelling procedures and use of other media studies such as POSTAR JICREG CAA admissions create a series of integrated media measures on a respondent by respondent basis. The scope of the database is described below:-

Television	Fusion from BARB
Magazines and National Newspapers	Fusion from NRS
Radio	Fusion from RAJAR
Regional Press	Profile matching from JICREG
Posters	Calibration via POSTAR
Cinéma	Calibration via CAA
Internet	TouchPoints
Direct Mail	TouchPoints
SMS	TouchPoints
Product Usage	Fusion from TGI

The Issues

The three media surveys to be fused onto the Hub Survey consist of a variety of different universes, sampling and weighting methodologies. Is it possible to fuse them all onto a recipient Hub Survey without loss of efficiency? It is as well to remind ourselves of the nature of fusion techniques.

Data fusion will recreate the true relation between any two variables X and Y, if and only if:-

1) The variables which donor and recipient surveys have in common are sufficient to fully explain this relationship.
2) The fusion algorithm can match respondents exactly on all common variables.

Any violation of these two conditions may result in the loss of efficiency known as regression to the mean. Avoidance of this is particularly important when examining the relationship between any two or more media. Consider the following example:-

	All Respondents	**Average Issue Readers Of Newspaper X (real)**	**Average Issue Readers of Newspaper X (fused)**
Average hours spent watching TV station Y per week	6.50	8.20	7.40
Average hours spent watching TV station Z per week	3.40	2.80	3.10

In both instances the fused data has regressed about halfway towards the mean for 'All Respondents'.

i.e. the fused data is closer to the all sample mean than the real data.

In the case of TV station Y the number of respondents reached by schedules covering both Newspaper X and TV station Y will be overestimated, because in reality the overlap is underestimated by the fusion. The converse is true for TV station Z. Clearly, the avoidance of regression to the mean is of very high importance.

Data fusion has one further associated problem. If donor and recipient surveys were of the same size, and each recipient respondent was randomly matched with one and one only donor respondent, the marginal totals of the donor file would be fully preserved by the fusion (which would otherwise be useless because all XY correlations would be lost). However, the moment donor and recipient surveys are of differing sizes, the marginal totals are exposed to the sampling process-some donor respondents may marry more than once, others may not marry at all. So, in the TouchPoints fusion, the 'currencies' observed in RAJAR, NRS and BARB will be altered somewhat within the context of sampling error.

The fusion issues thus were concerned with the sometimes conflicting elements of matching respondents as closely as possible (preserving interrelationships) and using donor respondents as evenly as possible (preserving currency).

In addition to the fusion process, other media measures were collected by the TouchPoints survey, and these were to be integrated with all other media measures. How can such a variety of media measures and processes of integration be presented in such a way to provide a meaningful data base for analysis?

Having considered the issues, we now examine how RSMB approached the problem of media integration. We start with the fusions.

Data Fusion in Practice

General Methodology

Throughout the media integration process, the fusion methodology was that used, tried and tested for the last 15 years on the highly successful integration of BARB and the TGI. A Mahalanobis distance algorithm was used in conjunction with nearest neighbour (least distance) matching. However, in order to ensure that donor respondents were not used so disproportionally that marginal totals passed across were subject to large sampling error, penalty weights were placed on donors when otherwise they would be used disproportionally relative to others. Throughout the fusions sex within the appropriate region were used as critical common variables

i.e. these were matched exactly.

In addition other common variables were weighted by importance, reflecting the extent to which they discriminated on the three media to be fused; 'the greater the weight of importance, the greater the contribution towards the interrelationship between any combination of media. '

The statistical technique used to determine importance was Analysis of Variance. Effectively this weighting process steers the fusion algorithm towards more important variables in the case where a perfect match cannot be found.

The Hub Survey Structure

The following table shows the structure of the Hub Survey in terms of key demographics and geographic distribution. Because the Hub Survey recruited people to keep an electronic diary (PDA) for a week, it proved easier to recruit technically competent respondents, and thus there was some over sampling of respondents with access to the internet at home. The data is compared to the weighted estimates provided by the BARB establishment survey.

	BARB Establishment Survey %	TouchPoints %
Gender		
Male	48	46
Female	52	54
Age		
15-24	15	10
25-34	16	20
35-44	19	20
45-54	16	17
55-64	15	16
65+	19	18
Social Class		
A	2	5
B	18	17
C1	28	31
C2	20	20
D	16	13
E	14	14
Region		
Borders and Overlaps	6	4
East and Overlaps	5	6
London & Overlaps	18	18
Meridian (+Meridian/SW/West)	5	7
London/Meridian Overlap	4	5
Midlands (+Midlands/East Overlap)	15	15
North East	4	5
North West	6	9
South West & Overlap (West)	5	5
Wales (+Wales/West Overlap)	11	4
West & Overlap	3	3
Yorkshire (+Yorks/NE Yorks/Mids/NW)	9	12
Scotland	9	8
Internet at Home		
Yes	51	70
No	49	30

Clearly the Hub Survey required some weighting to correct imbalances in sample structure. In addition, because of these imbalances, RSMB were of the opinion that a more flexible database for fusion purposes could be created if the Hub Survey were fused into the BARB Establishment Survey. The Hub Survey donates media and other diary measures to the Establishment Survey, a sample of 50,000+ respondents whose demographic and socio economic structure in terms of marginal totals and interrelationships is an industry standard. We thus begin our appraisal of the fusions by examining the results of the fusion of the Hub Survey into the BARB Establishment Survey.

Fusion of TouchPoints Hub Survey into BARB Establishment Survey

The Hub Survey donated data into the Establishment Survey (period 6 months to July 2005) creating a data base of 50490 respondents. The resulting‘re-engineered’ Hub survey became the recipient survey for all subsequent fusions. Given that the object is to fuse media surveys of sizes 60,000, 35,000 and 8,000 into this recipient file, as well as the TGI, the major benefit of this step would be to ensure a rather more even use of donor respondents, thus preserving marginal totals better than trying to force the donor samples into a small and rather more disproportional Hub Survey. However, the use of an intermediary is only useful if the fusion works well, otherwise one more stage of potential error would be added to the process of data integration.

The common variables included a variety of standard demographic and socio economic measures, and in addition key media measures such as multi channel home, Freeview and number of TV sets as well as variables relating to adoption of technology, such as access to internet at home and use of broadband.

Importance weights were calculated by Analysis of Variance (ANOVA) with the purpose of establishing the power of prediction of each variable on use of TV, Radio and Newspapers and Magazines

i.e. setting up a system best designed to preserve media interrelationships if possible. The greatest predictor was actual age, which received by far the biggest importance weight.

Other high weights of importance were placed on full time job, social grade, multi channel home and technical adoption items such as home access to PC, Broadband and Internet. The fusions were conducted using BARB region as critical variables. In effect 26 mini fusions were conducted.

On average donors were used about 10 times, although there is some dispersion around this average. This differential weight of donor respondent usage is the equivalent to differential weighting for the purposes of estimating sampling error. We estimate that the EFFECTIVE SAMPLE SIZE, allowing for differential use of respondents for the ‘engineered’ Establishment Survey’ is c3800 for data donated by the Hub Survey. It should be noted that this would also be true if the weighted hub survey had been used as the recipient sample, because of imbalances in items such as internet access.

As stated previously, the purpose of a good fusion is to match as closely as possible on common variables. Experience has shown that usually it is easier to match on binary variables than ordinal scales (e.g. social class) or continuous variables such as actual age. However, the consequence of mismatching on a key binary variable is usually greater than a scale mismatch, providing the scale mismatch is only one cell different.

- Included in matches which were over 90% accurate:
    - Full Time Job
    - Extra Channel Home
    - Head of Household
    - Housewife
    - Presence of Children

- Included in matches which were over 80% accurate:
    - Broadband
    - PC
    - Internet
    - Freeview
    - Ethnic Group

Status measures matched less well, with Social Class at 38%, although other status measures such as ACORN and TEA were in the high 70's. If Social Class is expressed as exact + one cell out the degree of fit rises to 83%.

Actual age, being a continuum, is only 11% perfectly matched. However, if is expressed in terms of normal 10 year age groups, this rises to 70%,and 99% on a one cell out basis.

If we ignore actual age, the degree of exact matching is equivalent to 17 out of 21 characteristics being perfectly matched for each respondent. This is totally in line with the degree of exact matching with classic fusions such as BARB/TGI. With this in mind, the 'engineered' establishment survey demographic and socio economic variables now become the currency for further fusions, together with media and other data passed on from the hub survey.

Fusion of RAJAR into TouchPoints

The critical variables within this fusion were the 100 interlaced RAJAR/BARB areas within sex, generating 200 separate fusions in total. Common variables included a variety of demographics, although socio-economic variables were restricted to social class. From the TouchPoints survey a series of media imperatives were calculated, involving 5 major BBC stations +other BBC,3 major commercial stations +other commercial. These were interlaced by 4 time segments and Weekday, Saturday, Sunday. This created 132 segments common to both RAJAR and TouchPoints. Given the number of separate fusions, frequently involving small samples, no fusion algorithm would cope effectively with so many common variables, so principal component analysis (PC) was used to reduce the number of dimensions. A 6 PC solution explained 75% of the variation in the data. Thus 6 sets of PC scores were generated for each respondent on TouchPoints, and calibrated onto RAJAR respondents. The 6 factors defined well general commercial radio listening and most BBC stations, but were less specific about specific local commercial stations.

Given the primary desire to preserve patterns of radio listening as observed on TouchPoints, it is not surprising that importance weights were heavily skewed in favour of the factors. Within demographics, actual age and full time job received high weights of importance, others relative low weights. Given the size of the RAJAR sample (c60,000) we would expect matches to be reasonably close, and donors to be used on average less than once. In practice donors were used 0.9 times on average, with some dispersion around this average largely explained by the number of regional fusions.

If we exclude continuous variables such as actual age and PC scores the degree of exact matching represented an average of 7.7 out of 10 variables. Most were matched with 80% + efficiency with the exception of social grade (35% correct, but this rises to 75% on an exact+ one cell out basis). Age matches exactly 8% of the time. However, if we group age into its normal 10 year bands, it is correct on 61% of occasions and on an exact + one cell out basis, the figure rises to 91%. For a continuous variable such as PC scores, it is useful to group them into deciles. The PCs with the highest importance weights matched with 40% efficiency on this basis, and 68% on an exact + one cell out basis. The commensurate statistics for the lesser weighted PCs were 26% and 54%.

Given the number of critical cells, restricting fusion choice, the matching process worked as well as a typical fusion.

Fusion of BARB into TouchPoints

As for all fusions, the critical variables are the 16 BARB regions and sex thus producing 32 fusions. A variety of standard demographic and socio economic common variables were available as well as TV variables such as multi channel home, Freeview and number of sets.

A series of media imperatives were created from TouchPoints covering the major TV channels and cable/satellite channels by type. These were interlaced by 4 time periods within weekday/Saturday/Sunday. In total 180 segments were produced. As for RAJAR the media imperative common variables were subject to principal component analysis and a 12 PC solution was chosen, explaining 70% of data variation. The 12 factors adequately summarized most channel/viewing occasions, though early morning viewing was not so clearly defined. As for the RAJAR fusion 12 PC scores were calculated for each respondent on TouchPoints and calibrated onto BARB.

Importance weights were inevitably skewed towards the PCs. Demographic variables received lower weights, although within this framework actual age and full time job received the highest weight.

The donor BARB survey consisted of 8788 respondents, and each donor was used on average 5.7 times, although variation around this average ranges between 0 and 17.

Excluding the continuous variables, of the 16 common variables on average each respondent was perfectly matched on 11. Poor matches related to Social Grade (25%), although if this statistic is expressed as an exact + one cell out basis the accuracy rises to 62%.

Of the continuous variables, if age is expressed in its usual 10 year bands,44% of respondents are exactly matched, and 81% on an exact plus 1 cell out basis. The matching of PC scores reflects the weight of importance placed on them. If expressed as deciles, the key PC has an exact matching rate of 41% for the first PC, and 80% on an exact + one cell out basis. Commensurate results for lower weighted PCs 2 to 6 are 23% and 50%, and for PC’s 7% to 12% and 30% are the match rates.

The quality of the matching is affected by the relatively small size of the donor file, the number of critical cells and the complexity of the PC scores. Nonetheless, the match rate is acceptable in comparison with other fusions.

Fusion of NRS into TouchPoints

An interlocking set of geographical segments relating to the structure of the NRS sample and also relating to BARB were created. In total 73 segments were created, which when interlaced with sex formed 146 critical cells for fusion purposes. The common variables consisted of a series of demographic variables, and socio economic variables included ACORN and TEA as well as Social Grade. Additional common variables included Home PC and Multi Channel Home. A series of 17 media imperatives were created from TouchPoints covering ‘redtop’ ‘middle’ and ‘quality’ dailies and Sunday newspapers, and a series of magazine classifications covering TV listings, women’s and men’s magazines, homes, and also specific magazines not elsewhere classified. Each segment was scored per respondent on a weight of reading basis. These media imperatives were subject to Principal Component analysis and a 6 factor solution was chosen, explaining 78% of data variation. The PC scores were calculated on TouchPoints and calibrated onto NRS. The factors very adequately summarized the main categories of newspapers and magazines, but were less powerful in describing specific magazines.

Importance weights were skewed towards the factors, particularly those defining newspaper categories. Demographically, actual age and ACORN (reflecting the disproportional structure of the NRS sample) received high weights, together with full time job.

Given the NRS consisted of 35841 respondents, the average donor was used 1.4 times, with variations ranging from 0 to 10. Ignoring for a minute the continuous variables, on average each respondent was matched exactly on 9 out of 13 variables. As usual, the algorithm matched disappointingly on social grade (23% exact, 67% on an exact plus one cell out basis). Age as expressed in 10 year bands matched exactly for 53% of respondents and 89% on an exact plus one cell out basis.

The degree of matching on the factors reflected their weight of importance. If PC scores are expressed as deciles, on average the highly weighted PCs matched exactly for 32% of respondents and this figure rises to 69% on a one cell out basis. Commensurate levels of matching for lower weighted variables are 17% and 33%.

The general level of matching of respondents on common variables is again up to the level of a normal fusion.

Fusion of TGI into TouchPoints

Because the TGI fusion was the last process in the creation of the integrated media system, the author has been unable to give a detailed examination of the relationship between real and fused media/product cross tabs. However the level of matching of common variables is very impressive indeed.

The critical variables within fusion were the 12 ISBA areas and sex, creating 24 separate fusions. The common variables included conventional demographic and socio-economic variables. Media variables included major BBC Radio stations, multi-channel households, Freeview, Qualities, Middle & Red Top newspaper reading and viewing of movies. In addition hobbies and interests were represented by viewing questions related to watching sports, music and children's programmes. Common variables were weighted within the algorithm in terms of importance and were particularly high on actual age, working status, Redtop newspapers, and presence of children, marital status and social grade.

Of the 26 common variables, on average each respondent was matched perfectly on 20 of the variables. This is the most accurate fusion to date and reflects on the similarity of the structures of the 2 surveys. The level of matching exceeded the original BARB/TGI fusion. Since the BARB/TGI fusion showed little regression to the mean in product/media terms, we have no reason to suppose other than a high level of efficiency in recreating the relationship between TGI product data and other media.

Thoughts on technical processes of fusion

Having examined the technical details of the fusion, an average match on non continuous variables of 7.2 out of every 10 variables compares very favourably with the original BARB /TGI fusion which had 7.3 exact matches per 10 common variables. These are very acceptable results, particularly if the geographical complexity of the fusions and the need to match on complex media imperatives is taken into account. The BARB/TGI fusion was a relatively simple process in comparison.

In an ideal world, the socio economic variables would have matched better, but the ANOVA phase of the operation, establishing how well these variables discriminated on media, inevitably steered the fusion towards complex media imperatives. Because of the fragmentary nature of modern media, the media imperatives steered the fusion in the broad general direction rather than pinpoint matches.

e.g. a 'heavy' quality daily reader is likely to marry another such person, but whether both read the same quality is up to the ability of other common variables to predict.

However, fusion is not about predicting exactly what an individual will do-no modelling system is able to do that –but it is about recreating correlations within the data that exist in the population as a whole.

The creation of an engineered hub survey undoubtedly allowed more flexibility in the matching process, and in some sense, provided a weighting process for the original TouchPoints sample. However, the donors were not used evenly because of geographical and sample structure complexities, and the lack of 100% perfection in the matching process is inevitable. These factors can lead to a loss of efficiency in recreating marginal totals (currency) and true correlations. The proof of the pudding is in the eating, and the next section of this report deals with the accuracy of the fusions. Firstly we examine currency preservation via marginal totals.

Preservation of Currency

In general, the differences in marginal totals between TouchPoints and the donor surveys follow a random pattern, which is exactly what would be expected given that fusion is in sampling mode.

i.e. a sample of donor data is passed on to recipients.

This is certainly true for RAJAR and NRS. TV viewing, however, showed an upward bias in the TouchPoints data. After fusion, total TV hours rose from 26.86 to 30.09, an increase of slightly over 10%. This is a little surprising given the thrust of the fusion to marry like with like in terms of heavy/medium/light/non viewing of specific channels. This may reflect a difference in sample structure between TouchPoints and BARB. Given weight of viewing in total showed an upward bias, it is not surprising to find that specific programmes followed this upward trend.

It should be noted that when the final results are presented, all statistics at total level have been calibrated back to their levels achieved in the surveys from which they were extracted. In a sense the examination of marginal totals is largely academic, but of course, the more similar the fused results are to the original level, the less the calibration, and for RAJAR and NRS the calibration factor is largely minimal.

Efficiency of the fusions

When we are judging the efficiency of the fusions, we must obviously compare fused interrelationships with original interrelationships as observed in TouchPoints. We have then to ask ourselves the question 'how similar should they be if the fusion is perfect?' If any survey is split into two random halves, would we expect the results to be identical? The answer is of course no-it is likely to look as follows.

	Sub-sample A			Sub-sample B		
Medium	Average for all Respondents	Users of Medium X	Deviation from Average	Average for all Respondents	Users of Medium X	Deviation from Average
A	20%	28%	+8	21%	27%	+6
B	30%	16%	-14	29%	16%	-13
C	15%	14%	-1	17%	15%	-2
D	18%	24%	+6	16%	23%	+7
E	9%	6%	-3	10%	5%	-5

In sub-sample A, users of medium X are more likely to also use medium A than are the whole population (28% v 20%). Sub-sample B shows similar but not identical results-and that is also true for comparisons of results for media B to E. If the sign in the deviation column is ignored, the sum of absolute deviations for sub-sample A is 32 and for sub-sample B the figure is 33. Taking an infinite number of such cross tabs, the expectation would be that the sum of absolute deviations for the two sub-samples would equate. However, if the fused results measured on these 5 cross tabs showed a sum of absolute deviations to be 16; the fusion has regressed halfway towards the mean. If the sum of absolute deviations for the fused file were 40, it has overestimated the power of discrimination by a factor of c1.25.

A further problem when assessing fusion is that when there is little discrimination in the data, or sample sizes are small, a crossover effect may be expected

e.g. Sub-sample A users of medium X have a deviation of +1 on usage of medium A, and sub-sample B users have a deviation of -1 on the same statistic.

In a random sub-sample situation the expectation is that these effects are self cancelling, but do the fused results show the same effect?

In order to assess the efficiency of the fusion some 25300 multivariate media cross tabs were conducted on both the 'real' TouchPoints survey data and the fused estimates of the same data. The columns in the cross tab consisted of pairs of media

e.g. Heavy quality readers and medium listening Classic FM

And the rows consisted of the medium not represented by the column

e.g. Light Channel 4 viewers.

25300 represented all possible combinations of 3 media. In a sense it is simulating possible media schedules but putting it in a form where comparisons with all population levels are possible.

As in the examples above, because sample sizes are small and some of the cross tabs show little discrimination, it is to be expected there are many instances where the crossover effect is evident

e.g. 'Real' cross tabs are slightly above the mean and fused equivalents are slightly below the mean-and vice versa.

Of the 25300 cross tabs, the crossover effect occurred on 6312 occasions, thus 18988 cross tabs preserved the same direction of discrimination. These two segments are now examined separately.

Of the 18988 comparisons which preserved the direction of discrimination, on 54% of occasions the TouchPoints sample showed greater discrimination than the fused estimates. This argues the case for a fusion effect of some regression towards the mean, because the unbiased expectation is 50%. However, if we express the data in terms of absolute deviations (ignoring whether discrimination is positive or negative) the average level of discrimination in TouchPoints is 0.46% and on the fused estimates 0.48%. The overall fusion effect here is to slightly overestimate discrimination by a multiplier of 1.04. Within this part of the sample of cross tabs there is no evidence of regression to the mean.

The following table shows the level of the difference in deviations between TouchPoints and fused estimate i.e. the difference between the two sets of deviations.

Differences in discriminatory power	**All Comparisons 18,988**
1% or over	2.9%
Over 0.5% to 1%	8.7%
Over 0.25% to 0.5%	19.5%
Up to 0.25%	68.9%

From this table we can see that on the great majority of occasions not only is the discrimination in the same direction, but the levels are similar.

We now turn to the 'crossover' sample of cross tabs. If the pattern is truly random, then we would expect the sum of deviations, this time including the + or- sign, to be similar. Because this part of the data file shows little discrimination, we may expect the average level of deviations to tend towards zero.

On 51% of occasions TouchPoints is above the mean and Fused cross tabs are below the mean. This is what might be expected by chance, and examined at this level the pattern looks normal. However, when we examine the magnitude of discrimination, for TouchPoints the average deviation is +0.07%, and for the fused deviations the average is -0.09%. In some sense the fusion has provided a regression beyond the mean of 0.16/0.07% or 229%.

Combining the two sets of results the overall estimate of regression to the mean is 7%.

i.e. 93% of discriminatory power has been retained by the fusion.

However, for reasons stated above, this statistic should really be considered separately for discriminatory variables and non discriminatory variables.

In conclusion, for discriminatory cross tabs, the fusion inflates the level of discrimination by a multiplier of 1.04. Where the cross tabs show little or no discrimination, the fused estimates are between 0.1% and 0.2% below what the real cross tabs show. Since the media schedules which may be run on TouchPoints are likely to be of a discriminatory nature, it is comforting not to observe evidence of regression to the mean.

Total Media Integration

As well as accommodating the fusion of BARB/RAJAR and NRS, the TouchPoints initiative collected a wealth of information relating to use of internet, length of time spent traveling, use of

SMS, receipt of direct mail, readership of local newspapers and visits to cinemas. How data consisting of such diverse measures could be integrated in any meaningful form. RSMB's solution was to convert the total data set into a series of personal probabilities-whether reading a newspaper, passing a poster site or conducting any of the activities leading the respondent to be exposed to advertising in a whole wealth of forms.

Where probabilities of doing something are measured directly, and are more than just an infrequent event, Binomial expansion is used to model the personal probabilities. Where probabilities have to be calculated indirectly, and/or are infrequent events

e.g. passing a given poster site, the models used have been created using the Poisson distribution.

In practice, for low probability events both binomial and Poisson distributions approximate very closely.

A variety of sensible assumptions were use in the process of assessing personal probabilities.
TV viewing is a particularly good case in point. Because of the wealth of data in BARB a 12 week period could be used to assess the probability of viewing programme X at a particular time of day on Channel Y. The resulting personal probabilities were calibrated to published data to ensure there was no loss of currency.

The NRS is obviously more static than BARB. RSMB's solution here was to divide the universe into 12 segments-combinations of age, sex and class, and within each segment, each publication was segmented in terms of heavy, medium, light and zero readership. Thus 48 segments were created for each publication, and within each segment the average AIR was calculated. The personal probabilities were then calculated for each segment using this average.

JICREG is available at aggregate level only, but can be broken down by basic demographics. Using the TouchPoints information within each of the publication areas, and for each of the 12 demographic segments zero readers are defined. The non-zero readers are then assigned probabilities (separately for each segment) such that when expanded, TouchPoints and JICREG statistics are identical.

Poster industry probabilities were calculated indirectly. From POSTAR the distribution was obtained of how many people passed 0, 1, 2, 3…. sites etc. From TouchPoints a frequency distribution was made of the number of hours spent travelling. By comparing the two distributions, and using linear assumptions, predictions of personal probabilities could be made.

The TouchPoints diary allows the calculation of the number of cinema visits per week. Using the demographic segments described above, the probability of visiting can be calculated such that TouchPoints estimates are identical with CAA statistics.

The TouchPoints questionnaire lists types of web-sites and also includes specific web-sites. The measurement relates to last week and last month. If not used in the last month the respondent is assigned a zero probability. Using the demographic segments, and the TouchPoints data, non-zero probabilities are calculated separately for each segment.

Two Direct Mail models are formed within the final TouchPoints output. The addressed mail model assumes the mailing is targeted at a specific household member (e.g. head of household). The model allows the selection of product groups via TGI and geodemographic groups, and allows probabilities to be calculated via binomial expansion. The unaddressed mail model assumes that the selection will be geodemographically based, and that within a particular target all households will receive the mailing and each individual within a household is equally exposed.

SMS commercial text messaging follows the same principle as for direct mail.

The creation of personal probabilities follows a set of reasonable assumptions, and where data exists, is calibrated back to currency.

Summary and Conclusions

1. The fusions of BARB, RAJAR and NRS into TouchPoints have worked well. The fusion hooks relating to media imperatives their job and preserved media interrelationships observed within TouchPoints very well.

2. The overall estimate of fusion efficiency is estimated at 93%. Overall regression to the mean is 7%

3. In practice most regression to the mean occurs in situations where the variables under consideration show close to zero discrimination. Where discrimination is better defined, there is a slight tendency for the fused results to overestimate the level of discrimination (via a multiplier of 1.04).

4. The fusion of TGI into TouchPoints showed the highest level of statistical matching attained in any of the fusions.

5. The creation of personal probabilities for a range of possible media events is based on a sensible set of assumptions, and the modelling thereafter uses conventional binomial expansion where possible. Where results are measured indirectly, the use of the Poisson distribution in the modelling approximates closely to binomial expansion for low probability events.

6. The author gathers that when applied, most of the media models generate results in line with conventional wisdom. However, the poster model seems to produce different results at the 4+ cover area. However, it is difficult to see, given the data at RSMB's disposal, what other assumptions they could have made to convert this data into a set of personal probabilities.

7. RSMB should be warmly congratulated in completing a quite monumental and daunting task. In particular their clarity of thought and attention to detail has been outstanding.

Appendix 5: Original vs. Fused Data

Channel	Target	input	Currency	TouchPoints 2
Television (BARB)	Adults 15+	350 TVR	77% reach	80% reach
Television (BARB)	Adults 15+	700 TVR	88% reach	89% reach
National Print (NRS)	Adults 15+	27 insertions in 17 newspapers and magazines	51% reach 104 GRP 2.04 frequency 50,841 impacts	54% reach 104 GRP 1.94 frequency 49,802 impacts
National Print (NRS)	Women 15+	91 insertions in 16 magazines	66% reach 421 GRP 6.42 frequency 105,539 impacts	61% reach 421 GRP 6.91 frequency 103349 impacts
Radio (RAJAR)	Adults 15+	Capital Radio	3% reach 18.6 GRP 6.95 frequency 9,357 impacts	3% reach 19.3 GRP 7.56 frequency 9,243 impacts
Radio (RAJAR)	Adults 15-34	63 GRP over 10 stations	15% reach 65.6 GRP 4.29 frequency 31,111 impacts	16% reach 69.1 GRP 4.42 frequency 31,515 impacts

Source: IPA