AUDIO SPANISH LANGUAGE UNIVERSE ESTIMATES UPDATE

OVERVIEW

Nielsen Audio uses language usage population estimates (either Spanish-dominant or English-dominant) as a weighting variable in qualifying Metros. These population estimates are based on the Nielsen Hispanic Enumeration Survey and are updated annually effective with the January PPM report period and Winter Diary survey.

The annual update occurs in 28 Metros that utilize Spanish Language Usage estimates. With the January 2019 PPM report period and Winter 2019 Diary survey, 24 PPM and continuously measured Diary Metros will be updated. The remaining two-book Diary Metros (Corpus Christi, McAllen-Brownsville-Harlingen, Oxnard-Ventura and Visalia-Tulare-Hanford) will be updated effective Spring 2019 as these Metros are not measured during the Winter Diary survey.

METHODOLOGY

Since 2012, we have used the local portion of the national address-based language enumeration survey. In most markets, six years of data are used to calculate estimates. Local market estimates are also further controlled in six regional market clusters, representing different language usage patterns. The more recent data and larger sample sizes by region provide greater controls for changes in language usage over time. Other advantages of this approach are coverage of cellphone-only households and a high response rate. The Media Rating Council® (MRC) has reviewed this methodology.

In New York, Chicago, and Los Angeles, two years of data is used to calculate the estimates. Estimates for Miami-Ft. Lauderdale-Hollywood and Riverside-San Bernardino are based on three years of data.

QUALIFICATION

The Nielsen Hispanic Enumeration provides Spanish language estimates in 28 select Hispanic DMA® regions only. Nielsen Audio Metros generally require a minimum sample size of 400 NHES persons and must meet *all* five of the following criteria in order to qualify for language weighting:

1. The market must meet the requirements for Hispanic Differential Survey Treatment (DST).
2. Sufficient Hispanic and Other in-tab target:
    a. In Radio Diary markets, the Hispanic 12+ and Other 12+ quarterly in-tab targets must each be 160 or more.
    b. In PPM markets, the Hispanic 6+ and Other 6+ average daily in-tab targets must each be 160 or more.
3. Sufficient Hispanic metro population:
    a. In Radio Diary markets, a minimum of 20% of the total persons 12+ metro population must be Hispanic.
    b. In PPM markets, a minimum of 15% of the total persons 6+ metro population must be Hispanic.
4. There must be at least 50,000 Hispanic Persons 12+ in the metro population (Hispanic Persons 6+ for PPM markets).
5. Spanish Dominant and English Dominant must each comprise at least 5% of the total Hispanic population of the metro and the quarterly theoretical target must be at least 18 for each (average daily theoretical target for PPM).

MARKETS

Nielsen applies Spanish-language usage weighting in 28 markets.

Radio Diary Metros

- Albuquerque
- Bakersfield
- Corpus Christi
- El Paso
- Fresno
- McAllen-Brownsville-Harlingen
- Oxnard-Ventura
- Tucson
- Visalia-Tulare-Hanford

PPM Metros

- Austin
- Chicago
- Dallas-Ft Worth
- Denver-Boulder
- Houston-Galveston
- Las Vegas
- Los Angeles
- Miami-Ft Lauderdale
- New York
- Orlando
- Phoenix
- Riverside-San Bernardino
- Sacramento
- San Antonio
- San Diego
- San Francisco
- San Jose
- Tampa
- Washington, DC

IMPACT ON AUDIENCE ESTIMATES

Language usage trends can change over time due to economic conditions, immigration patterns and other social factors. Changes in these universe estimates take place with each annual update. As such, the year-to-year changes may produce notable changes in the Spanish-dominant estimate.

Changes in population estimates for weighting characteristics may produce corresponding changes in a station's audience estimate for that population. A radio station with a larger percentage of Spanish-dominant listeners may experience a greater impact on its Average Quarter Hour radio ratings than stations with fewer Spanish-dominant listeners.

However, the impact of any change on population estimates is complex. It's not possible to predict with any reliability how these changes may affect a station's audience estimates. Other factors to consider when analyzing changes in audience estimates in the three new Metros include:

- Programming changes in the market
- Weather or major news stories that can influence radio listening behavior
- Typical survey-to-survey variance in estimates that is characteristic of survey samples
- Monthly panel changes in PPM Metros

Please direct additional questions to your Nielsen Client Solutions representative.