



Cineworld / City Screen Merger Inquiry

Survey Quality Moderator Report

Sheila Robinson
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Sheila Robinson Associates
Marketing Research Consultancy

Email: Sheila.Robinson.Associates@gmail.com |
Telephone: 00 44 (0) 20 8892 5529

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Survey Moderator Statement

This report is produced by me, Sheila Robinson, of Sheila Robinson Associates acting as a consultant to the Competition Commission. I have acted as the CC's Survey Moderator since 2009, assuring the quality of survey work conducted by market research agencies feeding into CC cases.

I am also employed at times as an external consultant working in the statistics team of the Competition Commission, although I was not part of the CC staff team for Cineworld / City Screen.

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1) Overview

There were two components to this research, an online survey using Cineworld and Picturehouse customer contact lists and a telephone survey interviewing people living in two test areas (Bury St Edmunds and Brighton).

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My involvement was primarily in the telephone research, acting as Survey Quality Moderator, but I was aware of the study from within the CC and participated in some discussions and meetings about the research more generally.

In my opinion the research was conducted professionally and provides good objective evidence to inform the Inquiry.

Telephone: The number of telephone interviews achieved fell short of target and so data from that source is less robust than anticipated.

Online: It is hard to comment on whether responses expressed in online surveys truly reflect consumer opinion, but given that the same questionnaire was effective in the telephone research it seems a fair assumption in this case. The response rate of 6% is in line with other online research conducted.

2) Organisation / Planning

The research agency have conducted many merger Inquiry studies for the CC and used this experience in the research. My impression was that the project was well organized and under control at all times and that any delays (e.g. in table production) were minimised.

Online: The agency sent out all the e-mails to customers, ensuring control of the sampling process.

Telephone: Although the telephone survey did not achieve as many interviews as had been anticipated I felt the agency put considerable efforts into trying to achieve the targets. More interviewers were allocated but refusal rates were exceptionally high.

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Agreeing and double checking the cinema lists for the questionnaire took considerable time and effort but was essential to doing good quality research and the agency did this very carefully.

Feedback as to the progress with the surveys was generally good.

3) Questionnaire development

The same questionnaire was used for online and telephone surveys.

The main challenge for the questionnaire was that of collecting data on all of the cinemas which the respondents might visit (prompted diversion). With so many areas and so many potential cinemas a decision was taken to keep strictly to the nearest cinemas based on drive time software calculations.

Telephone: For consistency in response the lists of cinemas were to be read out to respondents so that all potential cinema visits were collected, not just the most top of mind. This element of the questionnaire 'worked' but caused some irritation to respondents who already knew their choice or choices.

4) Telephone interviewing

The Director of the study gave a personal briefing to the main batch of interviewers selected for the telephone research.

Minor amends (e.g. additional rotations) were made to the questionnaire after the first evening (effectively used as a pilot) but reading out the names of all cinemas on the list for that area was retained.

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The quality of the interviewing I listened to was good. Interviewers retained a positive approach even when the strike rate was low, kept to the script well and appeared to elicit respondent opinions efficiently.

After a very positive start unfortunately the strike rate deteriorated and although significant field resource seemed to be allocated the interview targets were not achieved.

5) Tables

Initial tables were delayed leaving a rather short gap between tables and presentation. Comprehensive sets of final tables were produced after the presentation, both in aggregate and for each specific location.

An SPSS data base was also produced.

Additional analysis and information requests e.g. postcode data were handled very speedily and efficiently.

6) Presentation

The Director responsible for the study gave a presentation of results. This summarized the information, primarily from the online research and was well received.

7) Report

A draft report was delivered earlier than the timetable specified. As requested this was essentially the presentation charts in report format.

8) Survey Moderator Involvement

The opinions in this report are based on attending the first / main interviewer briefing session on 10th June and listening in to telephone

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interviewing on 10th and 11th June 2013. This took place at the GfK telephone centre in Elephant and Castle.

In addition to attending the presentation of findings (2nd July) there were face to face, 'phone and e-mail conversations.

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