



It's Not Always What You Say,
But How You Say It!

Cary McFarland
Sr. Account Manager
Wednesday August 3, 2005



Agenda

- Reading Scarborough Reports
 - Crosstab & Profiler
- Interpreting Scarborough Reports
 - What does the data tell you?
 - What are the most important points?
- Presenting the data
 - Telling the story
 - Presentation is important (visual aides)
- Q&A



Reading Scarborough Reports

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON



Scarborough Reports: 3 Elements

- BASES

- Starting universe for your report (All Adults in NY Market, Hispanics in Miami)

- COLUMNS/TARGETS

- WHO your report is about (My attendees, Adults who plan to buy a new car in the next year, McDonald's customers)

- ROWS

- WHAT you want to ask of your target/column (Demographic information, Items HH plans to buy next 12 months, Attended at least 1 game in the past year. . . .)



2 Types of Scarborough Reports:

- Profiler Report

- **Benefit:** Allows you to sort your report by percent or index
- **Drawback:** Limited to only 1 target in report
- **Optimal** report output for building charts in Excel or PowerPoint

- Crosstab Report

- **Benefit:** Allows you to compare multiple columns in the same report
- **Drawback:** Cannot be sorted unless in Excel
- **Optimal** for creating a side-by-side comparison report (example: demos)



Profiler Report:

BASE: Total (Default setting) All adults in Tampa DMA
 COLUMN: Attended Devil Rays Game Past 12 Months

Demographics

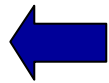
	Total Pop.	Total %	Target Pop.	Target/Vert %	Index	Horz %
Total	3,132,555	100	341,246	100	100	10.9
Age summaries						
Adults 25 - 54	1,527,608	48.8	174,004	51	105	11.4
Men 18 - 34	378,579	12.1	55,729	16.3	135	14.7
Men 18 - 49	793,709	25.3	133,741	39.2	155	16.9
Women 18 - 34	367,839	11.7	16,514	4.8	41	4.5
Women 18 - 49	782,784	25	55,124	16.2	65	7
Household income summaries (HHLD)						
\$50,000 or more	1,346,696	43	196,330	57.5	134	14.6
\$75,000 or more	761,208	24.3	134,397	39.4	162	17.7
\$100,000 or more	398,768	12.7	66,978	19.6	154	16.8



Vertical %, Horizontal %, Index



- **Vertical %:** What % or how many of COLUMN = ROW
 - 58% of Devil Rays attendees have a HHI \$50K+



- **Horizontal %:** What % or how many of ROW = COLUMN
 - 15% of adults w/ HHI \$50K+ have attended Devil Rays game
- **Index:** Measurement of likelihood (can be read both ways)
 - 100 = market average
 - Devil Rays attendees are 34% more likely than the market average to have a HHI \$50K+
 - Adults with a HHI \$50K+ are 34% more likely to have attended a Devil Rays game



Crosstab Report:

BASE: Total (Default setting) All adults in Tampa DMA

Demographics

			Events attended/places visited past 12 months	Wireless/cell phone carriers currently use
	Cell	Base	Tampa Bay Devil Rays baseball game	Verizon Wireless
Total	Proj	3,132,555	341,246	286,873
	Horz %	100	10.9	9.2
	Vert %	100	100	100
	Index	100	100	100
Age summaries				
Men 18 - 34	Proj	378,579	55,729	33,230
	Horz %	100	14.7	8.8
	Vert %	12.1	16.3	11.6
	Index	100	135	96
Household income summaries (HHLD)				
\$100,000 or more	Proj	398,768	66,978	39,672
	Horz %	100	16.8	9.9
	Vert %	12.7	19.6	13.8
	Index	100	154	109





Interpreting Scarborough Reports

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON



An Ideal Sponsorship, Promotion, or Marketing Campaign Will . . .

- Increase product or company awareness, including name recognition
- Shape the awareness of a company, product, or service so it ties in with a particular lifestyle
- Enhance a firm's community profile and commitment to the community
- Improve corporate identity
- Generate goodwill by associating with sports (or other media outlets)

Source: *Sports Marketing: "The Money Side of Sports"* Kermit Pemberton



Why is Research Important?

- Knowledge is Power
 - The more you know, the more prepared you will be
 - Make smarter, more well-targeted decisions
 - Understand the client/prospect and their business
- Act as a Consultant
 - Let Scarborough help you be a valued resource for your clients and help them grow their business
 - Most people look to multiple forms of advertising to deliver their message
- Set Yourself Apart From the Competition!



How Can Scarborough Help?

- **Demographics & Lifestyles:**
 - Who are my fans?
 - Who are your customers?
 - Are they similar? Different?
- **Market Share and Competitors Report**
 - Where does the client stand in the marketplace?
 - Are they trying to grow their customer base or maintain market share?
 - Who's the competition?
 - Cross shopping & closing ratios



How Can Scarborough Help?

- Trending:
 - Is business growing or decreasing?
 - Other forms of advertising?
 - Is the overall market changing?
 - Is your fan base/attendance increasing or decreasing?
- Overall Category Info:
 - Participation in the Industry
 - Purchasing power
 - Lifestyle information



Scarborough Can Help Answer Questions

- How does my team/league fit?
- Am I already reaching their customers?
- Am I not most effective in reaching their current customers, but effectively delivering their competitors?
- Are you reaching the client's target market?
- Besides my team or league, what other media will effectively reach the client/prospects customers?



How to Prepare:

- Do a needs analysis with the client/prospect
 - Without a needs analysis, you won't know what's most important to them
 - How can you justify that you deserve a piece of their advertising budget?
- Data is open to interpretation. Find the story that best suits the clients needs
 - A low index is not always a bad story
 - A high index is not the ideal story



Example

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON



The Scenario:

In the upcoming months Quizno's is expanding their business in the Cleveland market. They are looking create an effective multi-media buy and are considering a sponsorship with a local sports property in the market. They haven't had many retail locations in Cleveland, but are hoping to grow their business over the next year. They aren't targeting a specific demographic, but are looking to appeal to customers with healthy active lifestyles who might be looking for healthy QSR options. They compete with all QSR's in the market, but are looking to directly obtain additional business from Subway's customers



Why is it Important to Present Data Using Graphics?

- Data sheets can be difficult to understand and digest
 - Don't speak another language, use images that are easily interpreted
- Gives a visual impact
- Can be a great leave-behind for the client/prospect

At their best, graphics are instruments for reasoning about quantitative information . . . well-designed data graphics are usually the simplest and at the same time the most powerful

- The Visual Display of Quantitative Information (Edward R. Tufte)



Suggestions for Presenting Data Using Graphics

- Words next to graphics help to explain the data shown
- Use labels (no legends!)
- Try not to abbreviate too much. It forces the person to decode information
- Never forget to source your information
- Don't use excess chartjunk on your slides (clipart, gridlines, too much shading and fill patterns and motion slides)
- Don't use CAPS. It's not as easy for someone to read
- Try to use horizontal charts whenever possible (they are easier to understand than vertical charts)



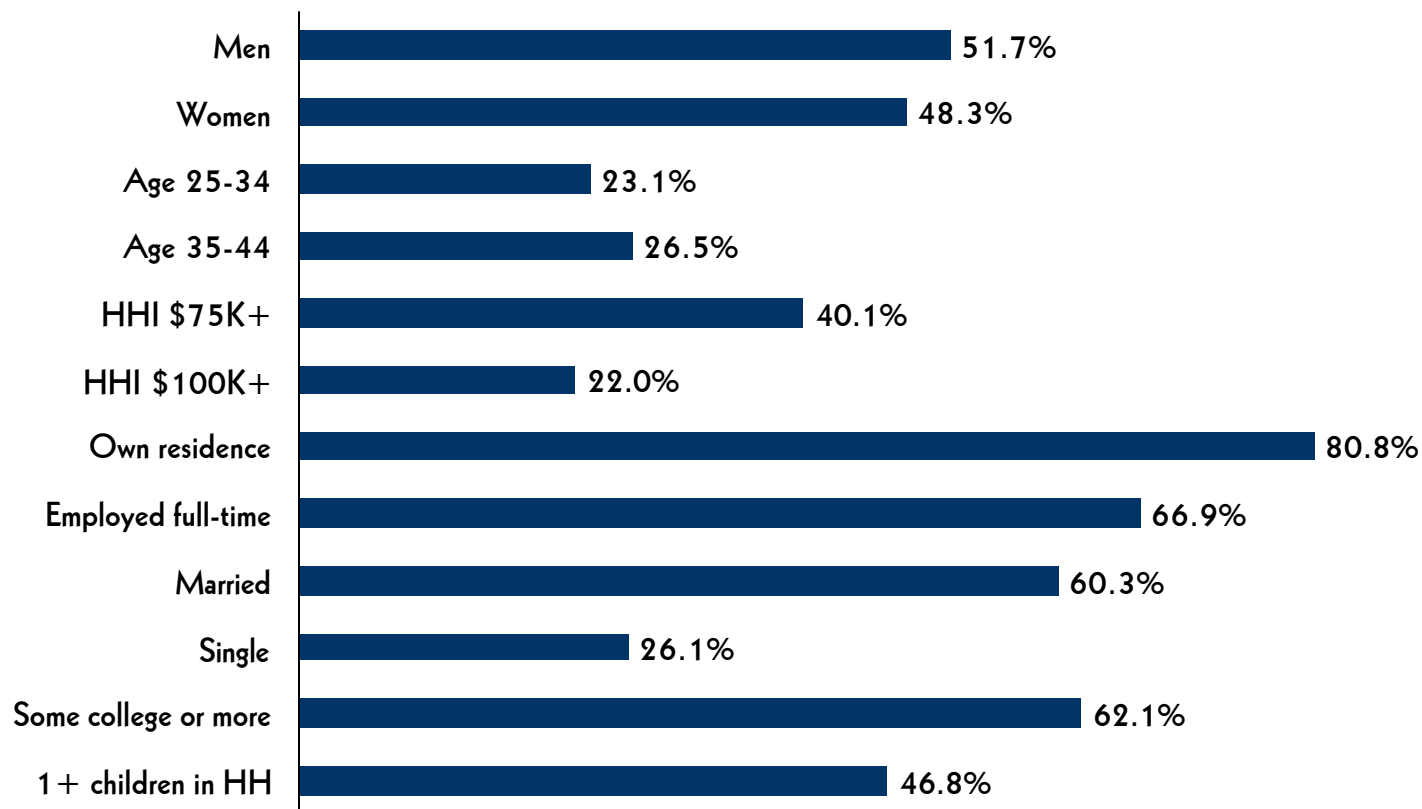
Understanding Quizno's Business

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON



Demographic Profile: Cleveland

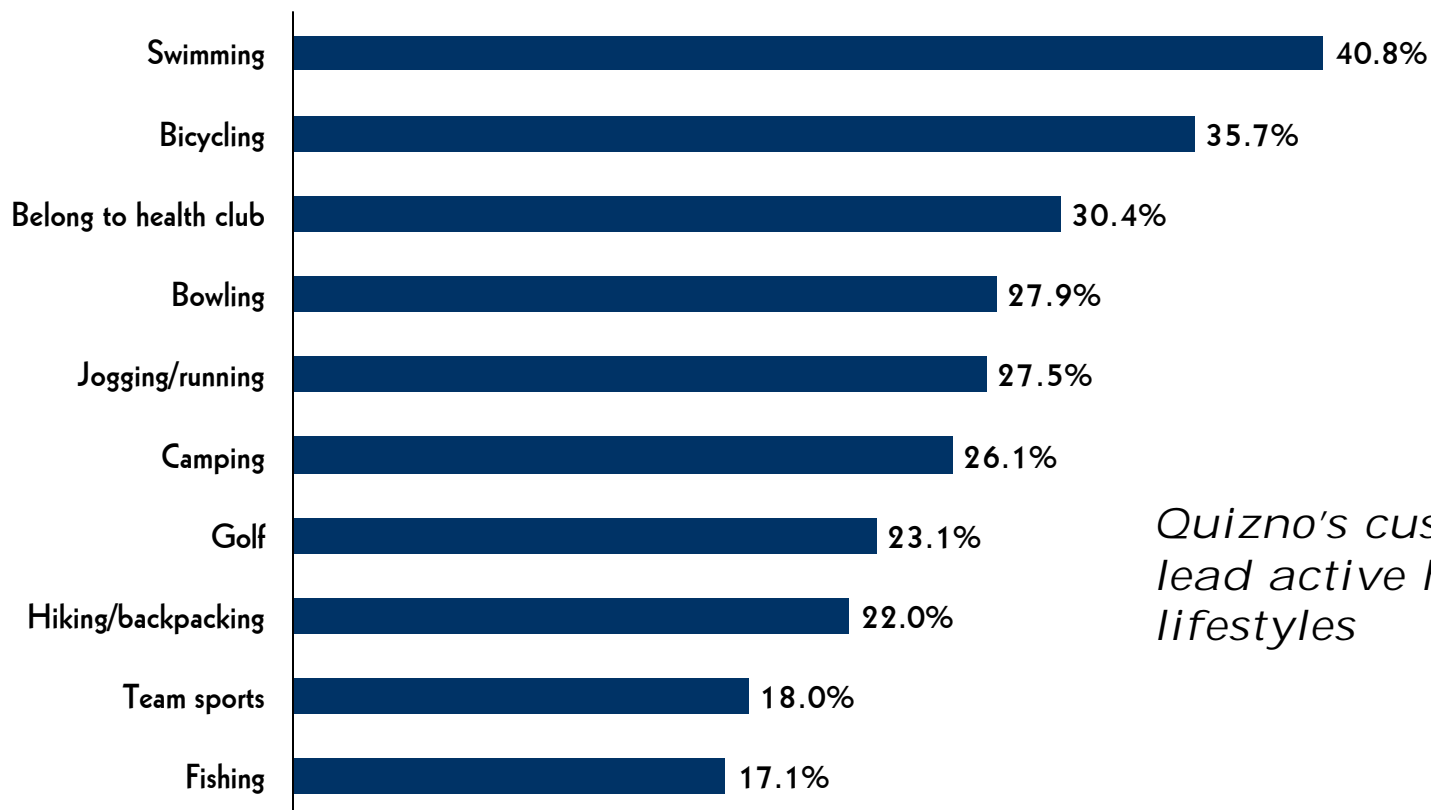
Visited Quizno's past 30 days





Lifestyle Profile: Cleveland

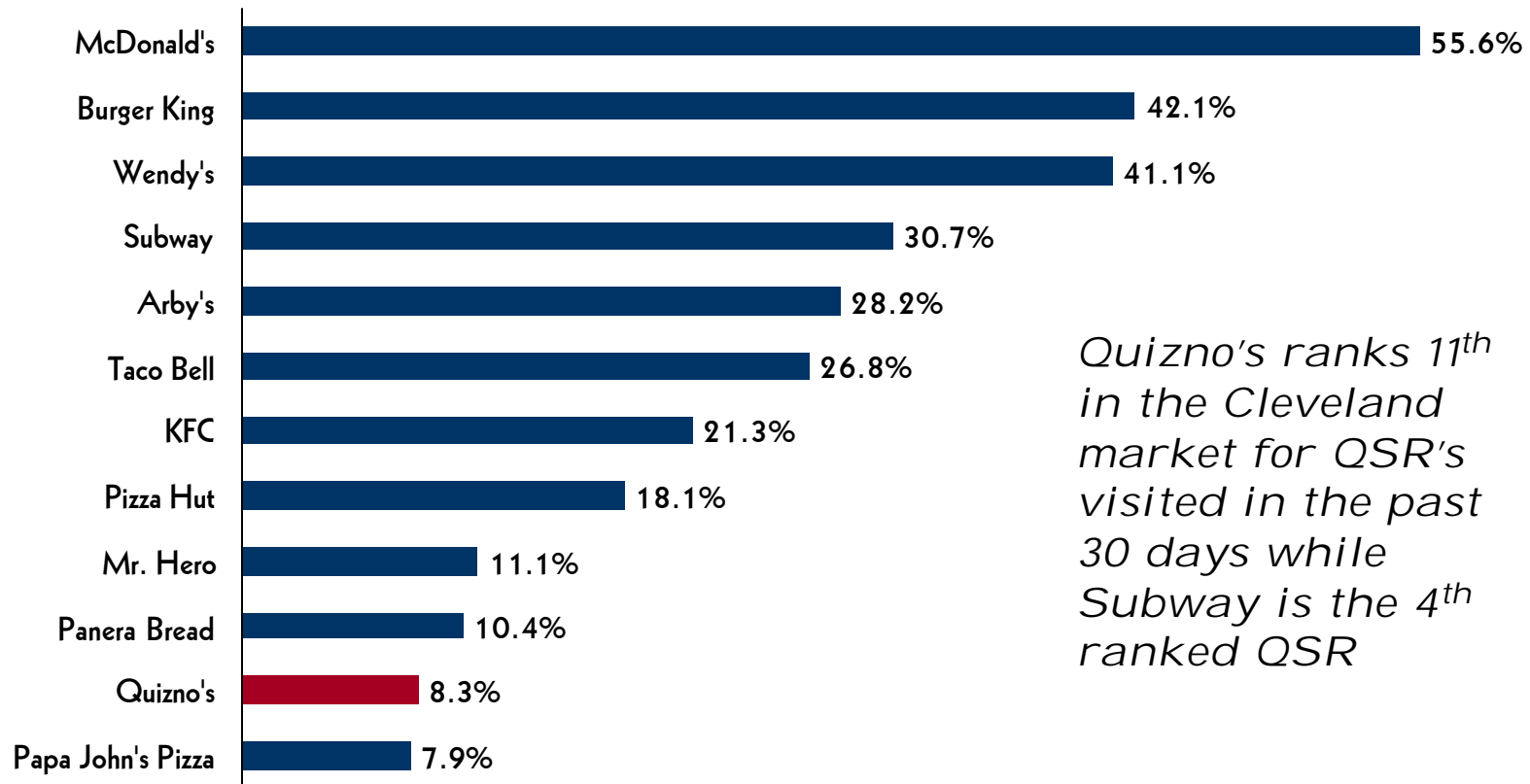
Visited Quizno's past 30 days



Quizno's customers lead active healthy lifestyles



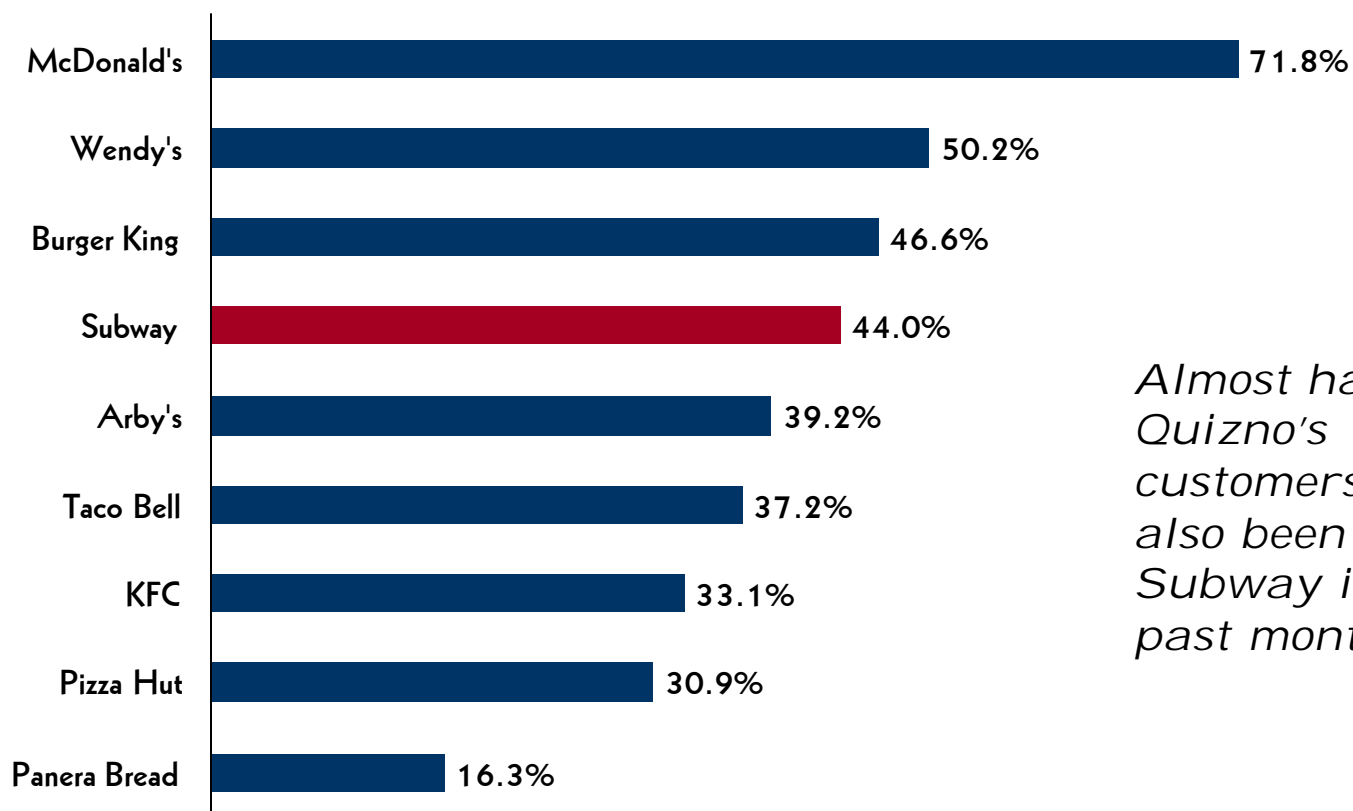
Quick Service Market Share Report: Adults 18+ Visited past 30 days



Quizno's ranks 11th in the Cleveland market for QSR's visited in the past 30 days while Subway is the 4th ranked QSR



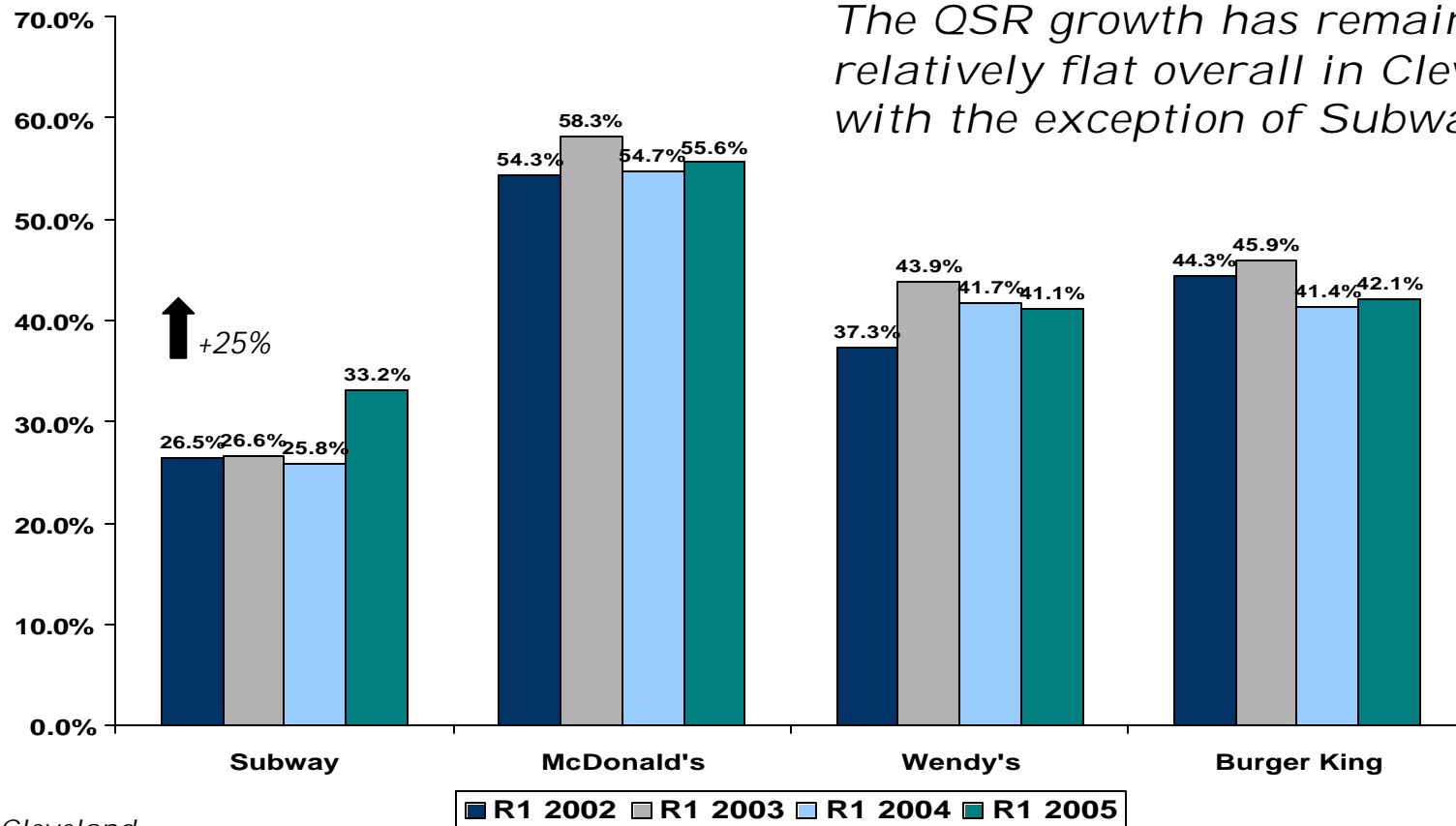
Quick Service Competitors Report: Among Quizno's past 30 day customers



Almost half of Quizno's customers have also been to Subway in the past month

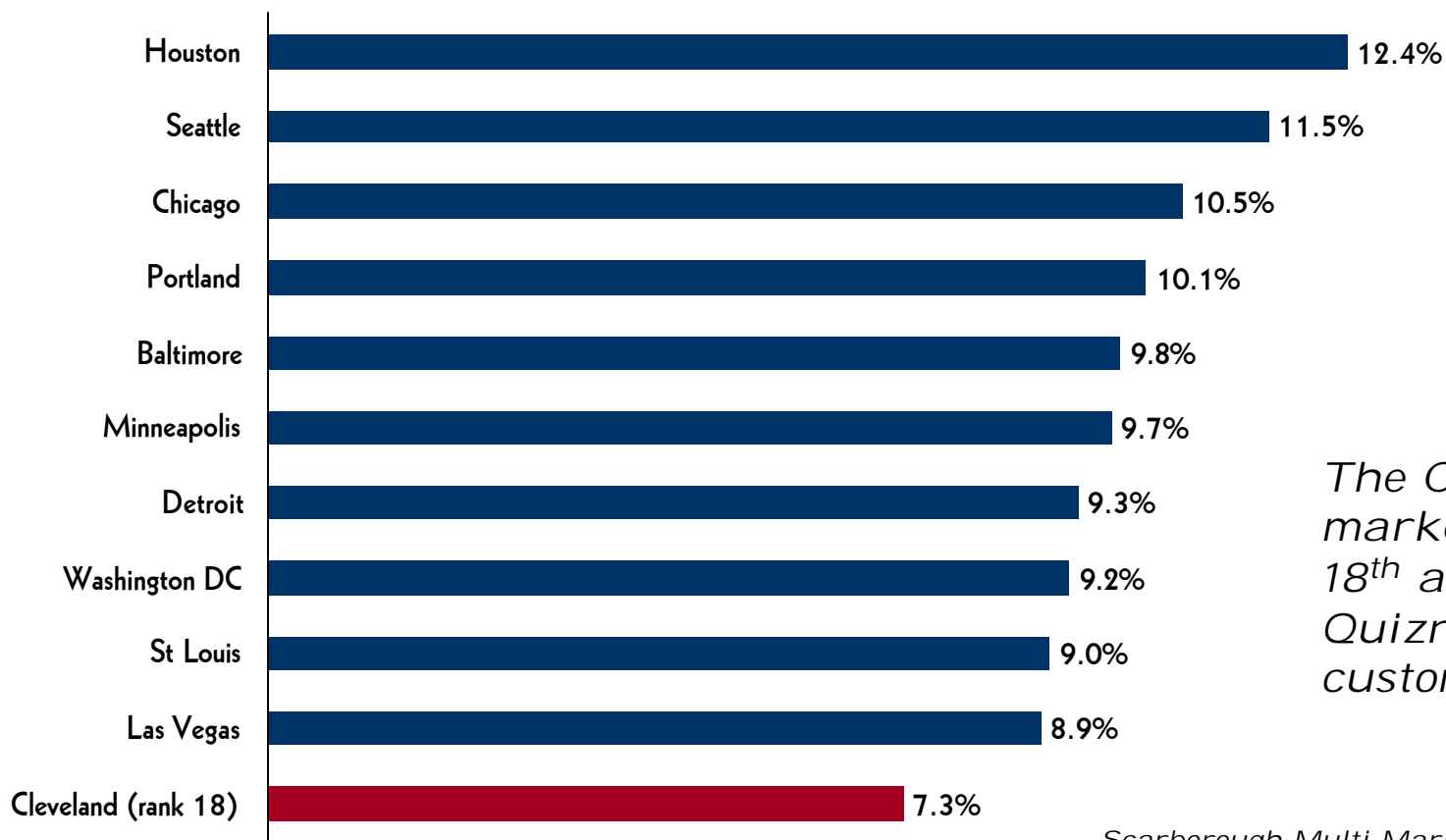
Quick Service Trend Report:

QSR's Visited past 30 days: '02-'05





Market Ranking: Top 10 markets Among Quizno's past 30 day customers



The Cleveland market ranks 18th among Quizno's customers.

Scarborough Multi Market 2004 R2 (6 months)

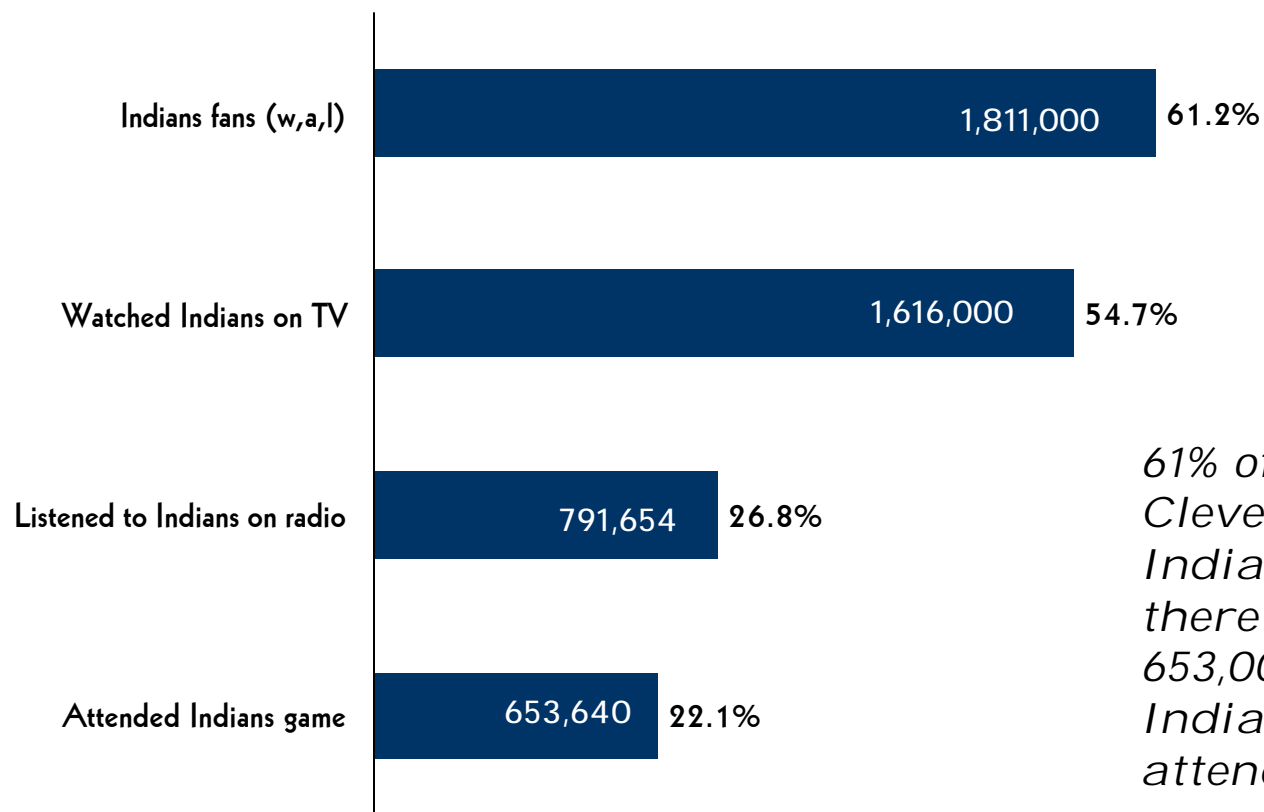


Quizno's & The Indians

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON



The Indians in Cleveland:

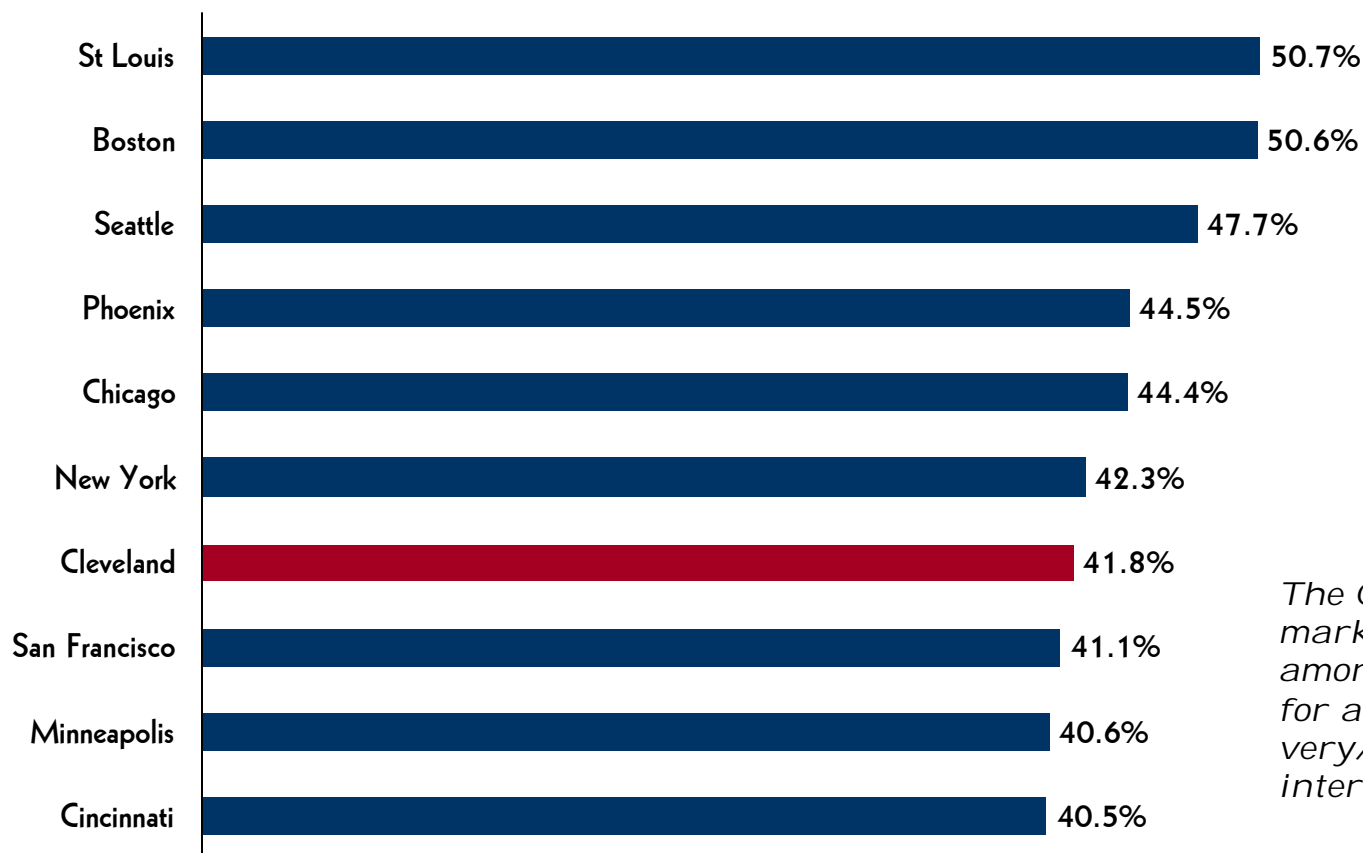


61% of adults in Cleveland are Indians fans and there are over 653,000 unique Indians attendees



Market Ranking: Top 10 MLB markets

Very/somewhat interested in MLB

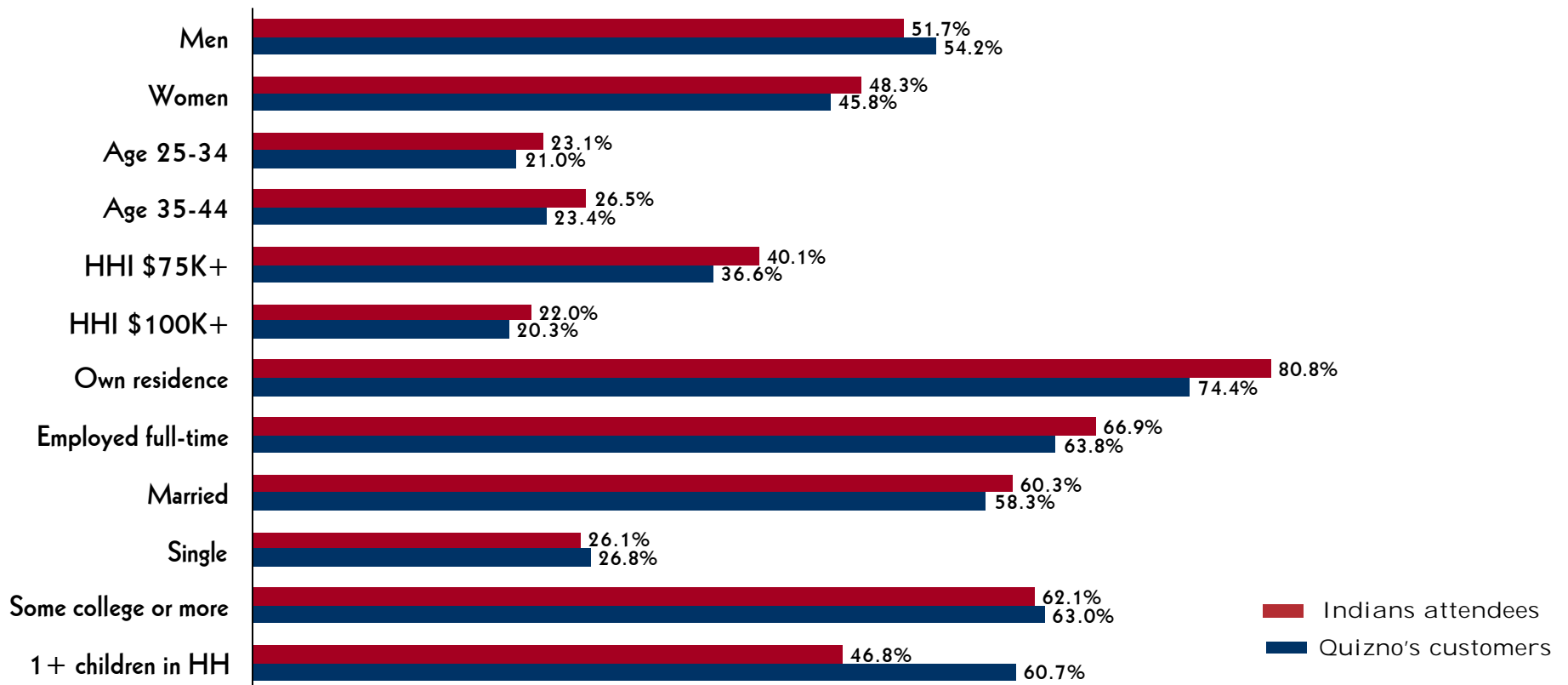


The Cleveland market ranks 7th among MLB markets for adults who are very/somewhat interested in MLB



Demographic Profile: Cleveland

Attended Indians game past 12 months & Visited Quizno's in the past 30 days

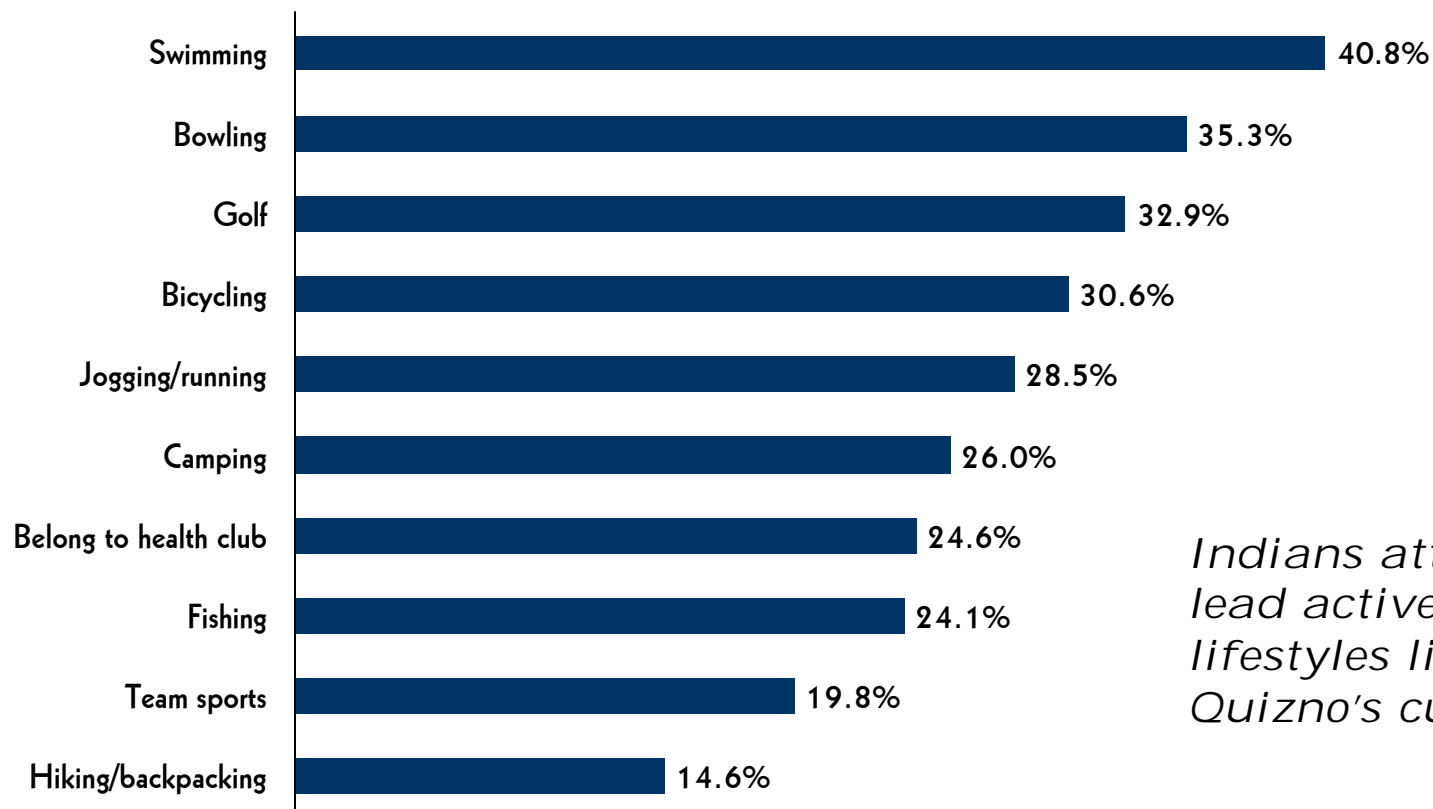


Scarborough Cleveland Release 1 2005



Lifestyle Profile: Cleveland

Attended Indians game past 12 months

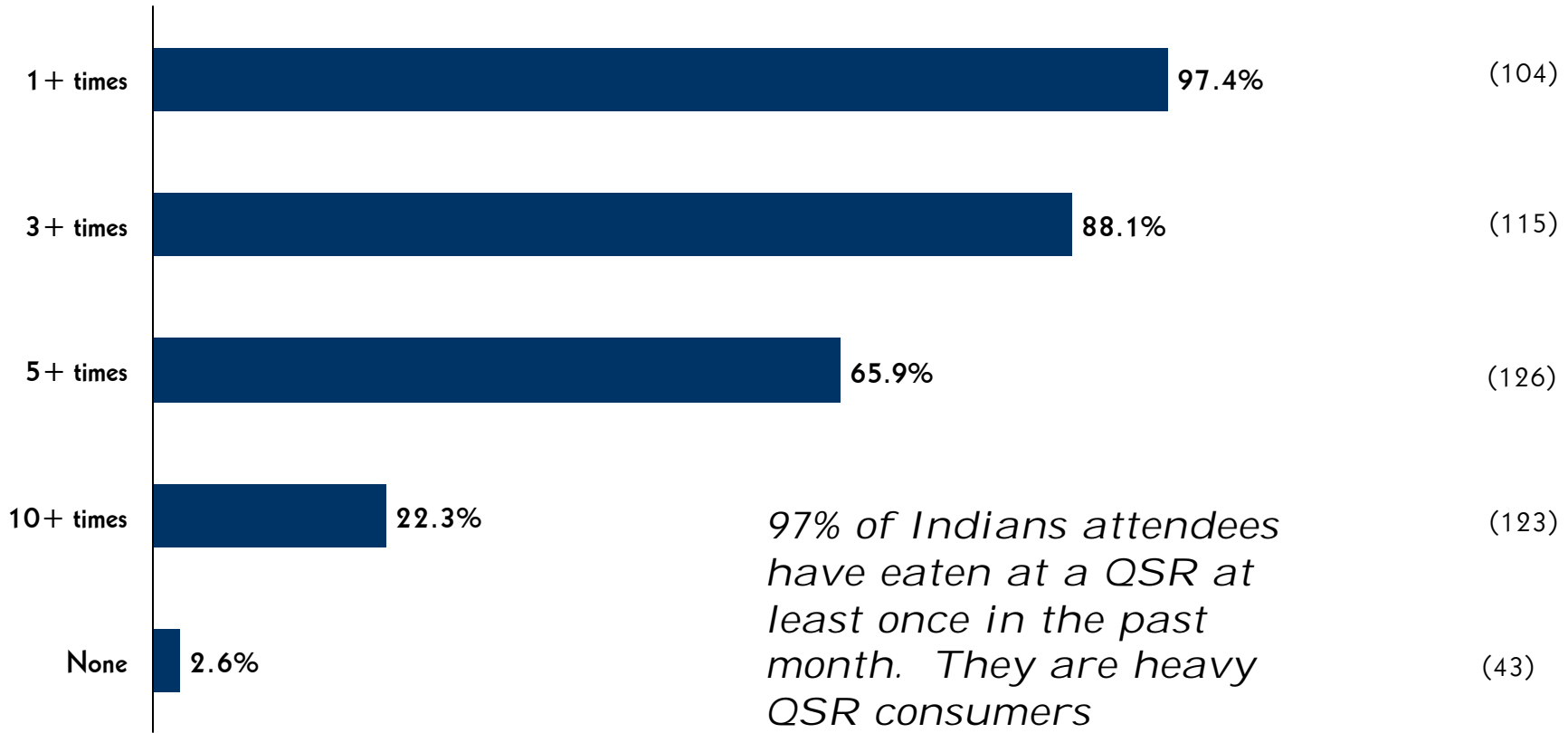


Indians attendees lead active healthy lifestyles like Quizno's customers



No. of Times Eaten at QSR Past 30 Days:

Attended Indians game past 12 months





QSR Purchasing Power Report:

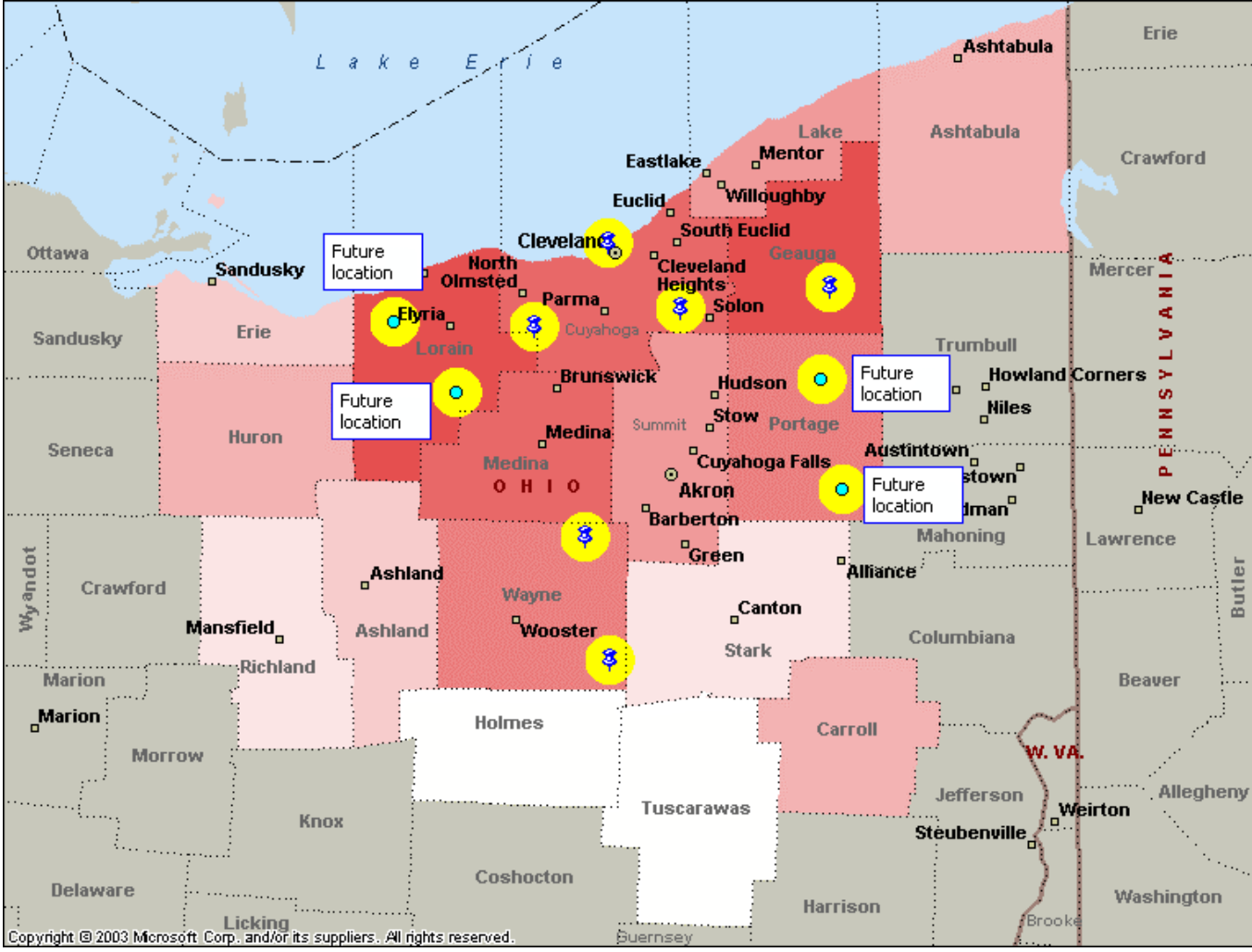
If we don't ask it . . .create your own estimate

- If 636,660 Indians attendees dined at a QSR at least once in the past month and each spent a conservative \$5 on their purchase, then Indians attendees represent at least \$3.1 million in QSR spending in the past 30 days.
- 75,440 Indians attendees dined at Quizno's at least once in the past month. If they each spent \$5 per purchase then Indians attendees spent at least \$377,000 at Quizno's in the past month



Indians Attendees by Penetration

- 29.0 to 39.3
- 25.0 to 28.9
- 21.0 to 24.9
- 20.0 to 20.9
- 12.0 to 19.9
- 10.5 to 11.9
- 5.0 to 10.4
- 0.0 to 4.9



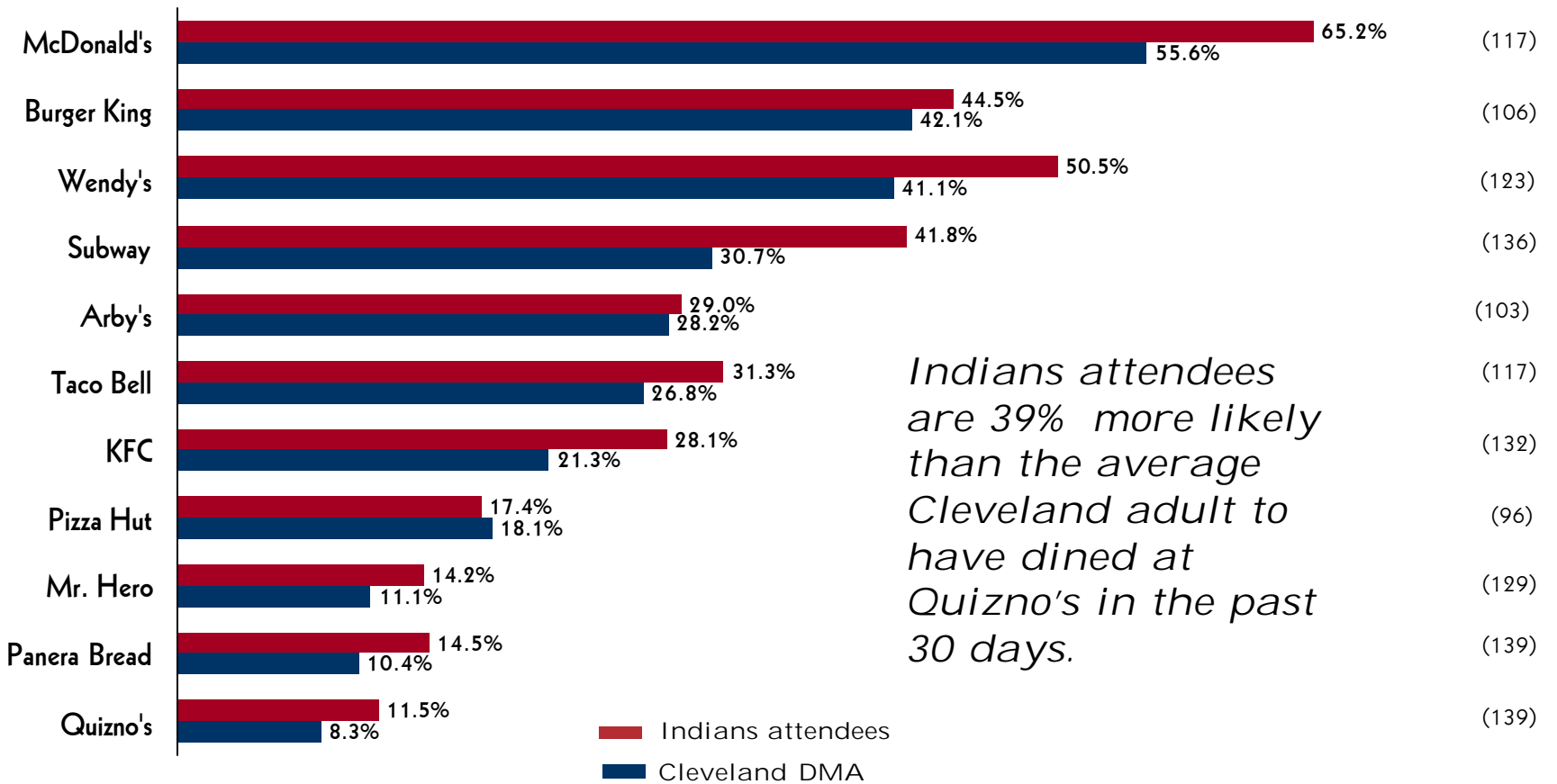
There is a high penetration of Indians attendees within the area of Quizno's current and planned locations



2005 SSRM



Quick Service Report: Indians Attendees and QSR's visited past 30 days





What About The Competition?

The Indians deliver when compared to the other teams in the market

Quizno's Past 30 Day Customers	Fans (w,a,l)		Attendees	
	Target %	Index	Target %	Index
Cleveland Indians	72.6%	119	30.6%	139
Cleveland Browns	71%	113	17.5%	158
Cleveland Cavaliers	42.5%	111	14.4%	173

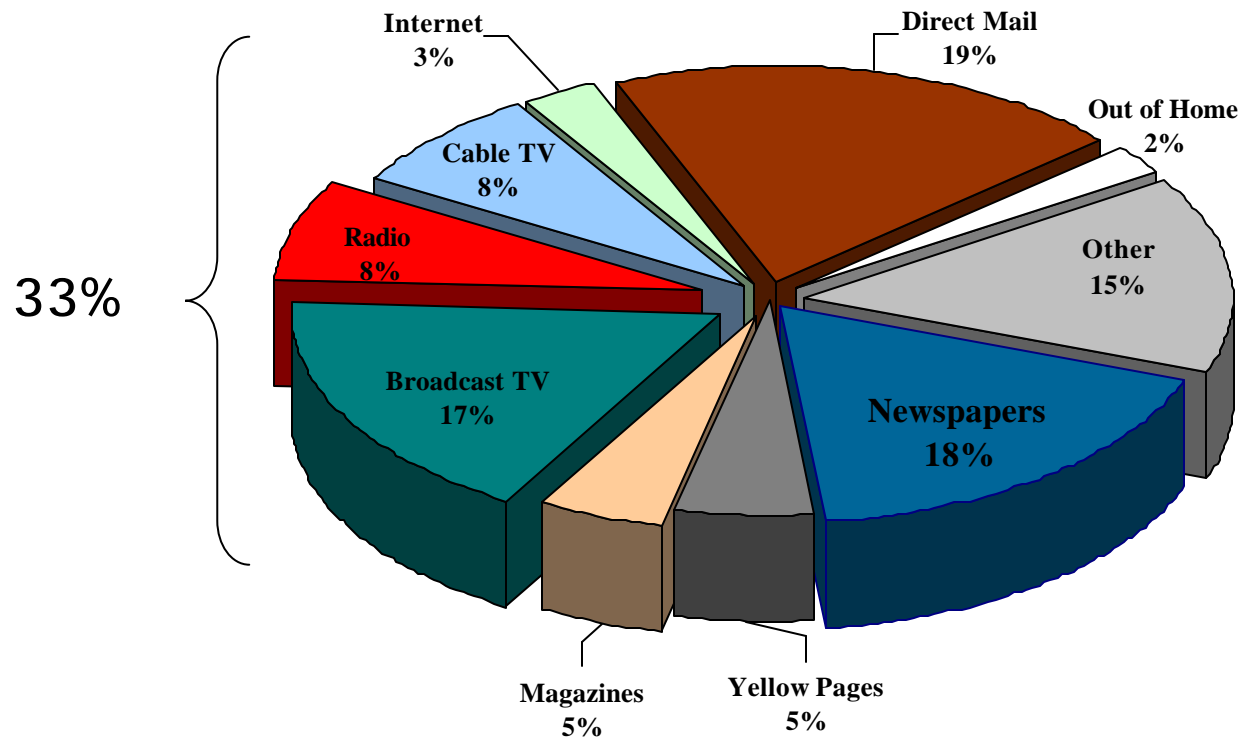


Quizno's Media Overview

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON



2004 Share of U.S. Advertising Spending By Media

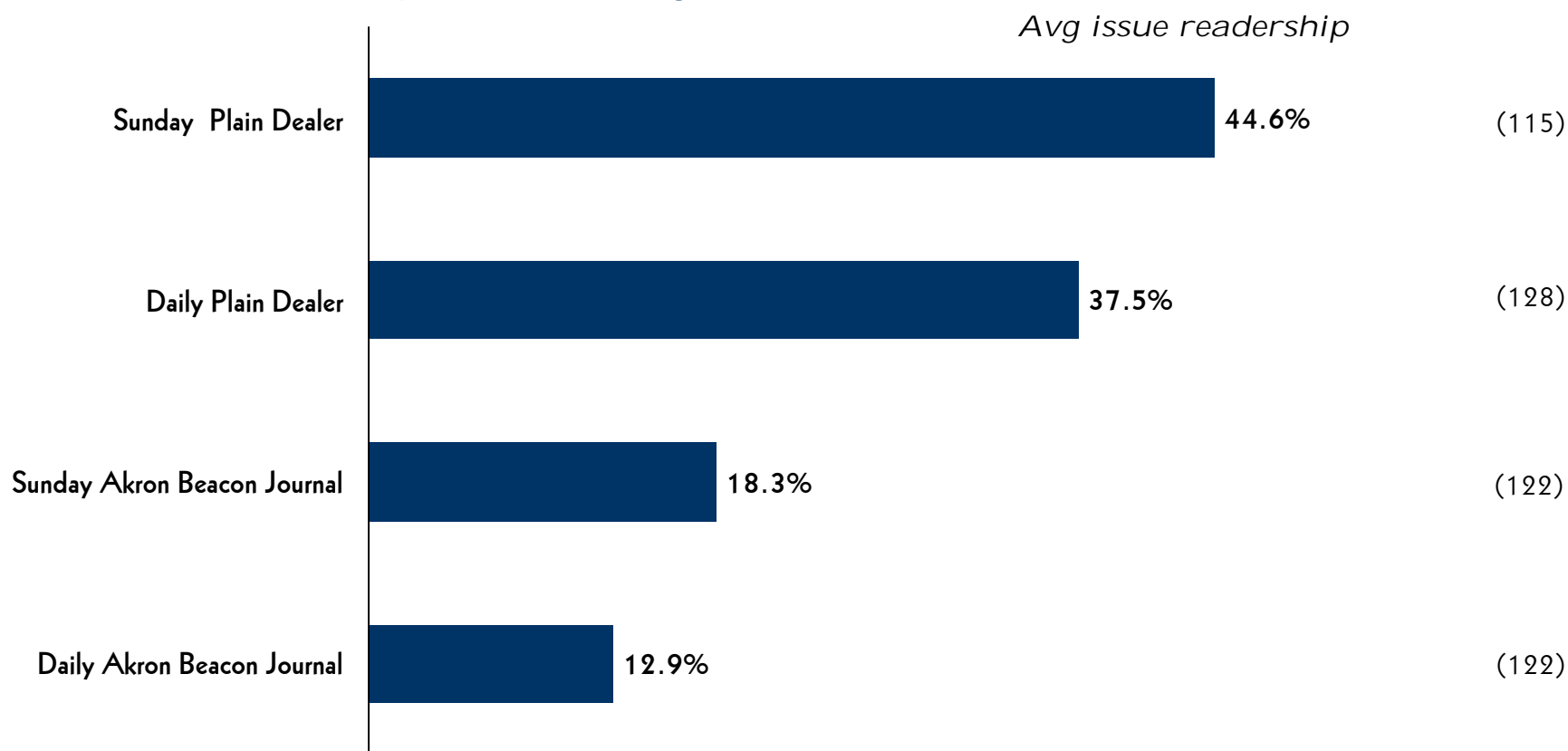


Source: Prepared for Universal McCann by Robert J. Coen; Bob Coen's Insider's Report
From the McCann-Erickson Worldwide website





Daily & Sunday Newspapers Visited Quizno's past 30 days

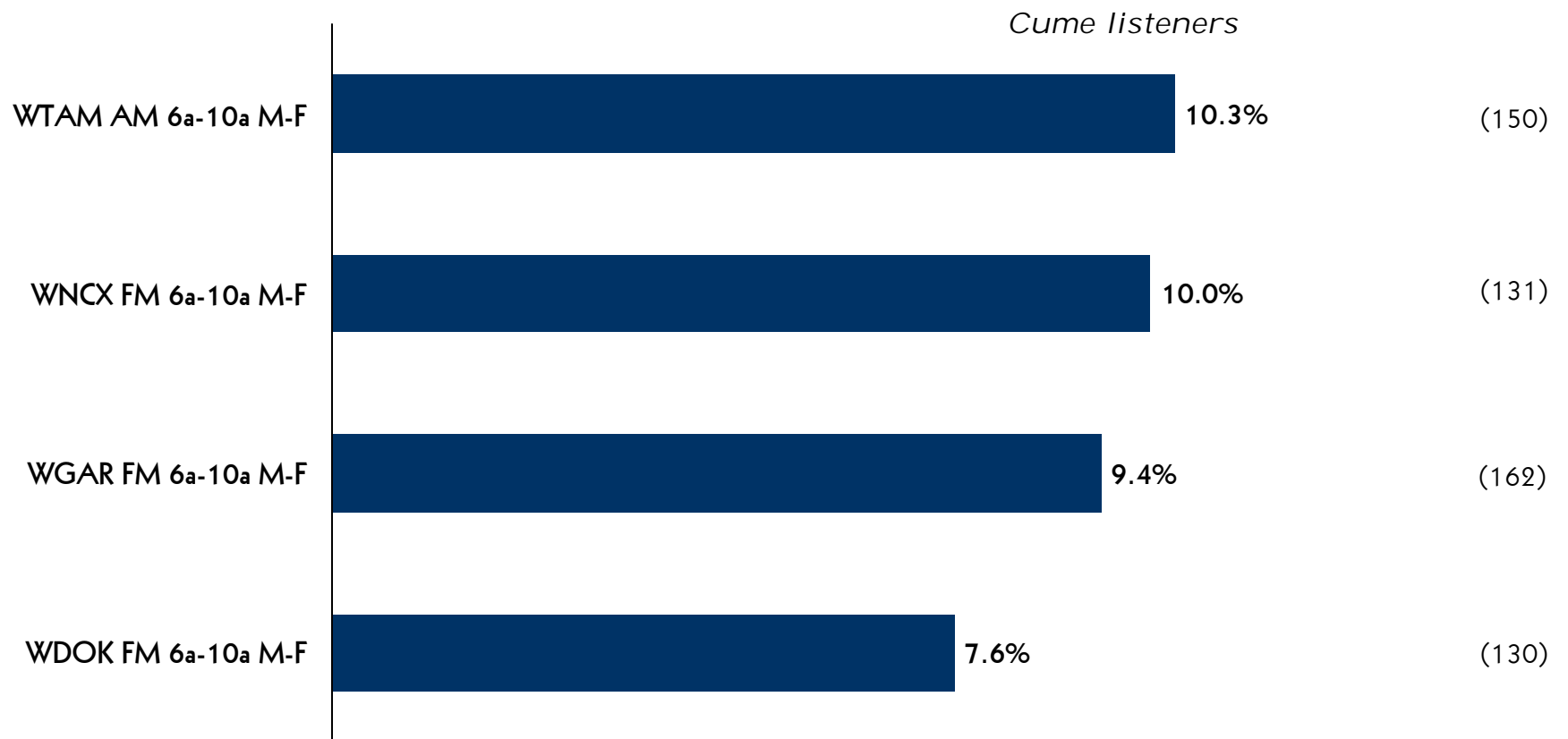


Scarborough Cleveland Release 1 2005



Radio: Morning Drive

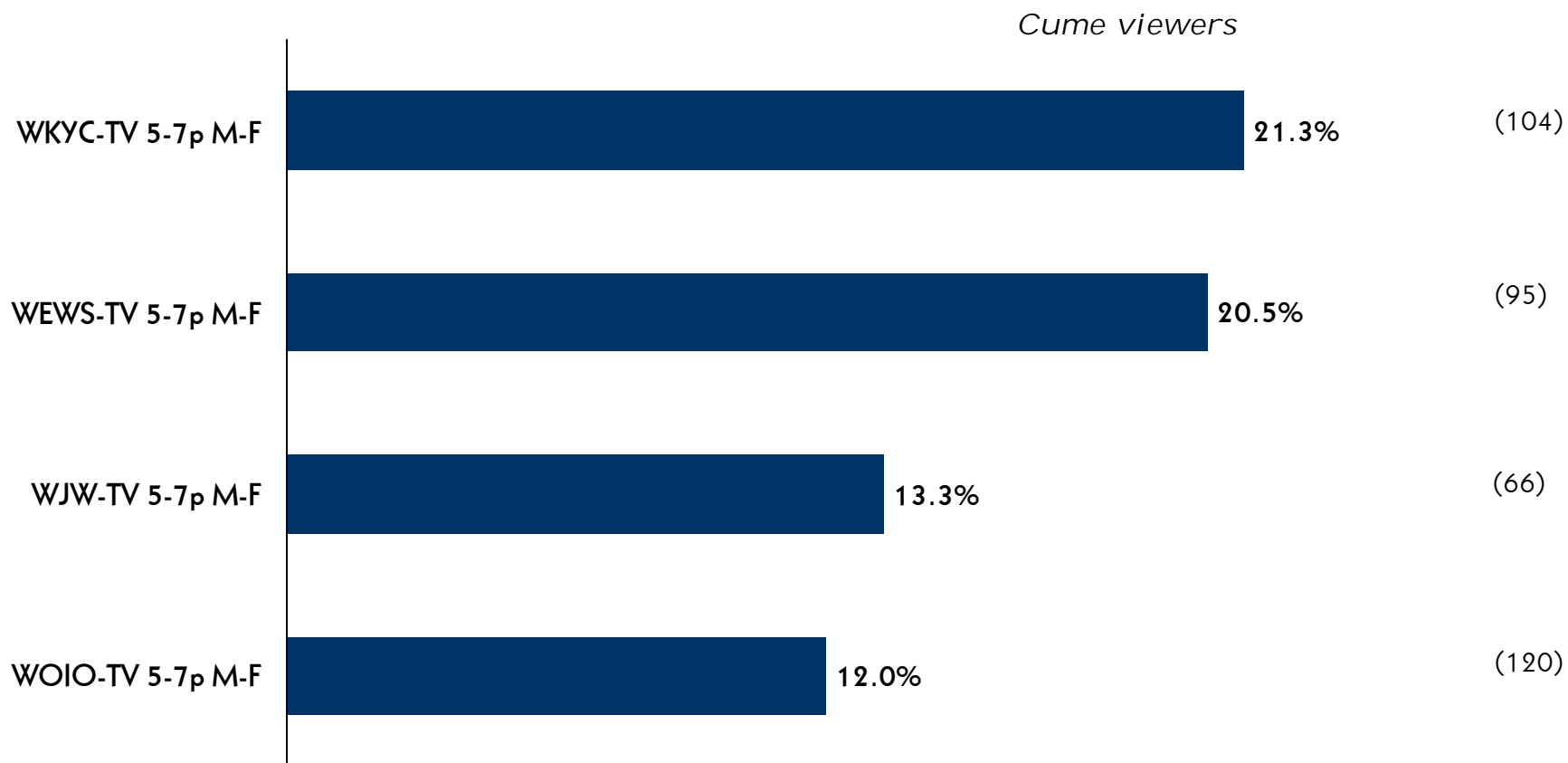
Visited Quizno's past 30 days



Scarborough Cleveland Release 1 2005



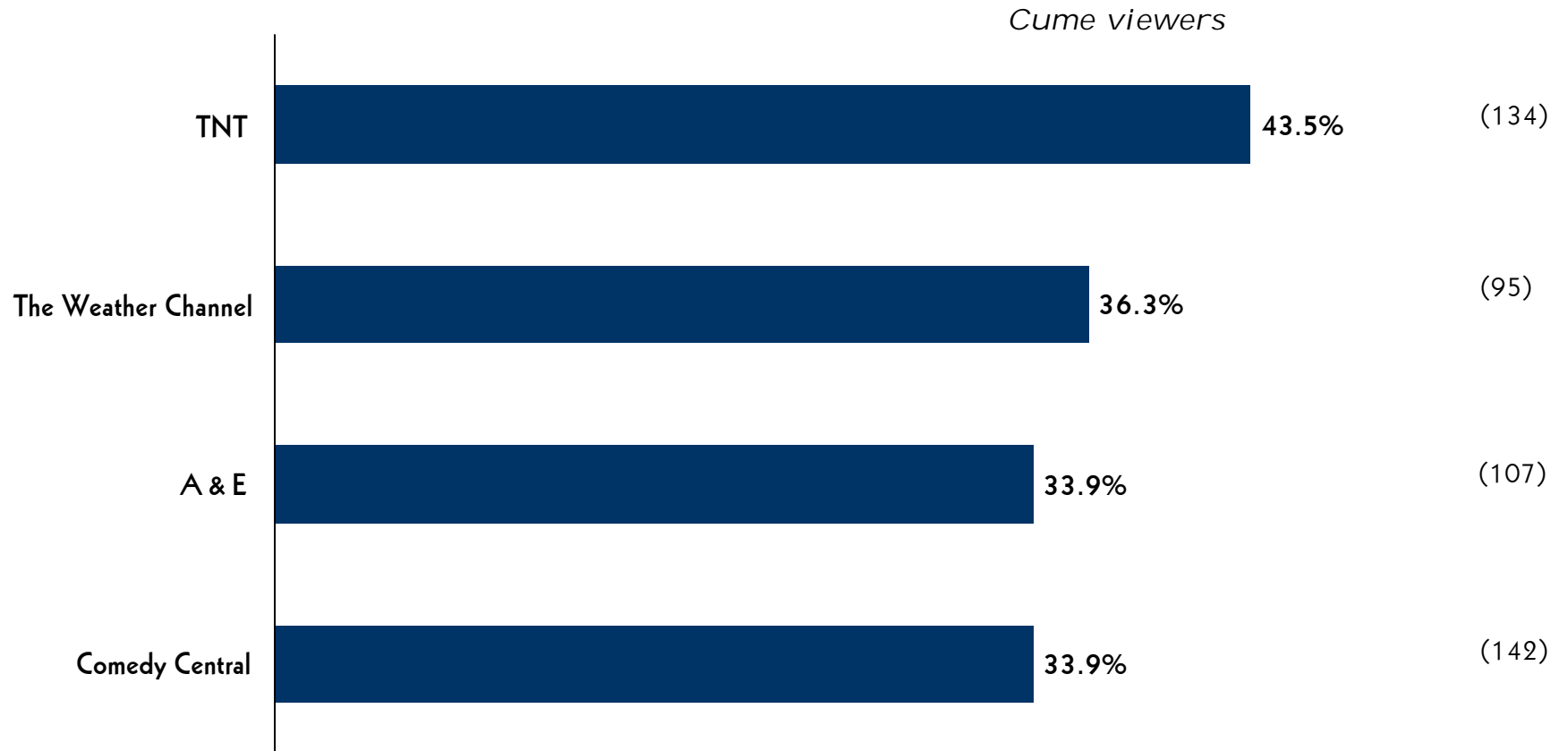
Broadcast Television: Early News: Visited Quizno's past 30 days.



Scarborough Cleveland Release 1 2005



Cable Television: Networks watched past week
 Visited Quizno's past 30 days

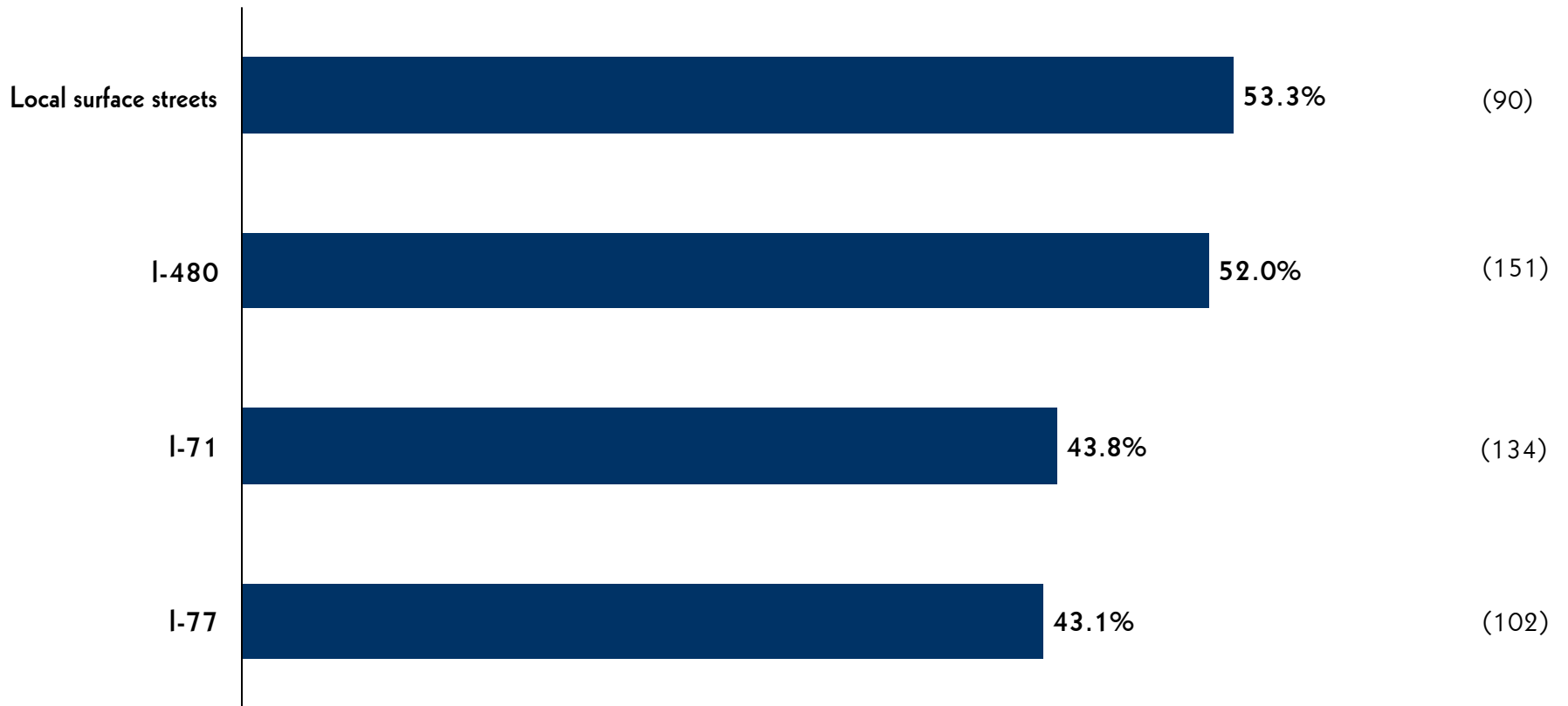


Scarborough Cleveland Release 1 2005





Roads Traveled: Visited Quizno's past 30 days





In Conclusion

- Understand how to speak data in a language that everyone can understand
- Data is up to interpretation, so be sure to tell the right story
- Knowledge is power, use Scarborough to understand your clients/prospects business
- Act as a consultant to your clients and build a lasting relationship
- Present data in graphs so they are easily interpreted and will make the greatest impact



Questions?

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON



Thank You

Cary McFarland
646-654-8825
cmcfarland@scarborough.com

AUGUST 2 - 5, 2005 THE FAIRMONT COPLEY PLAZA, BOSTON