

2005 SSRM

REVOLUTION

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SCARBOROUGH RESEARCH

AUGUST 2 - 5, 2005

THE FAIRMONT COPLEY PLAZA, BOSTON



Recent Cable Initiatives What this means for the MSO

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Scarborough Cable Re-Contact Study

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New Product Overview

- How the study came to be
- Cable re-contact sub-committee
- Test design/fieldwork
- Results
- New Scarborough Product Option

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Background

- Cable Advisory Board feedback:
 - Need additional cable viewership information beyond 7-day cume
 - Desire cable program specific measurement as well as usage of emerging media technologies
- Client sub-committee formed at the conclusion of the 2004 Advisory Meeting charged with developing optional solutions

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Sub-committee work

Sub-committee composition:

- Arbitron Cable: Carol Edwards, Beth Bryan, David Oglevee
- Scarborough Research: Mark Manders, Kim Main
- Clients:
 - Amy Boroughs – Charter
 - Art Salisch – Comcast
 - Larry Sklar – Time Warner City Cable
 - Denise Wiggins – The Weather Channel (for Jim Alexander)
 - Jeff Boehme – NCC
 - Evelyn Sias – MTV
 - Tanim Hussain – Cox

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Sub-committee work

- Conference call meetings began July 2004
- Identified needs:
 - Recontact must capture nuances of local markets
 - Robust sample sizes for titles at the local level
 - Need actionable data on “hot” titles
 - Information on digital channels not measured in the syndicated study
 - Video recording capability
- Test was scheduled to field in the fall of 2004

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Test design/fieldwork

- Four-page recontact questionnaire developed to measure:
 - Programs typically watched for ~200 programs on 39 ad-inserted networks
 - Local cable channels – Frequency of viewing weekly
 - Digital/other networks not measured in syndicated study
 - Video recording capability
 - Reasons for video recording
 - Frequency of video recording
 - Cable/satellite provider

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Re-contact Survey Snapshot

Please indicate each of your answers by placing an "X" in the appropriate box(es).

1	Check programs you typically watch.
<p>A & E</p> <p><input type="checkbox"/> Airline</p> <p><input type="checkbox"/> American Justice</p> <p><input type="checkbox"/> Biography</p> <p><input type="checkbox"/> City Confidential</p> <p><input type="checkbox"/> Cold Case Files</p> <p><input type="checkbox"/> The Daily Show</p> <p><input type="checkbox"/> Growing Up Gotti</p> <p>ABC Family</p> <p><input type="checkbox"/> 7th Heaven (onABC Family)</p> <p><input type="checkbox"/> Full House (onABC Family)</p> <p><input type="checkbox"/> Movies onABC Family</p> <p><input type="checkbox"/> Whose Line Is It Anyway? (on ABC family)</p> <p>Animal Planet</p> <p><input type="checkbox"/> Amazing Animal Videos</p> <p><input type="checkbox"/> Animal Cops - Detroit</p> <p><input type="checkbox"/> The Crocodile Hunter Diaries</p>	

1, continued	Typically watch
<p>CMT (Country Music Television)</p> <p><input type="checkbox"/> CMT Most Shocking</p> <p><input type="checkbox"/> CMT Summer Games</p> <p><input type="checkbox"/> Driven</p> <p><input type="checkbox"/> One on One</p> <p><input type="checkbox"/> Top Twenty Countdown</p> <p>CNBC</p> <p><input type="checkbox"/> Cover to Cover</p> <p><input type="checkbox"/> Dennis Miller</p> <p><input type="checkbox"/> McEnroe</p> <p><input type="checkbox"/> The Suze Orman Show</p> <p><input type="checkbox"/> Tim Russert</p> <p>CNN</p> <p><input type="checkbox"/> American Morning</p> <p><input type="checkbox"/> Anderson Cooper 360°</p> <p><input type="checkbox"/> Larry King Live</p> <p><input type="checkbox"/> Lou Dobbs Tonight</p> <p><input type="checkbox"/> NewsNight with Aaron Brown</p> <p><input type="checkbox"/> Paula Zahn Now</p>	

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Results

- 1,058 questionnaires returned
- Overall return rate – 47%:
- Data processed, merged to full database & delivered to processors in December, 2004
- Database delivered to Comcast, Cox and Adelphia for analysis in January 2005

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Scarborough Re-Contact Study

- Now part of the Arbitron Cable suite of Scarborough Services and currently available to all clients
- Approximate turnaround time is 8 weeks
- Information and proposals are available for all Scarborough DMAs upon request
- Questions?

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Scarborough's New Mid-Market Service

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New Product Overview

- Why a Mid-Market Study?
- Test Market
- Study Design
- Study Results
- Moving Forward

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Why a mid-market Scarborough Study?

- Demand for Scarborough branded information beyond the top 75 markets.
- Need for more comprehensive qualitative information in-line with the local economics of this particular market size.
- MSO desire for exclusive partnership with one company (Arbitron/Scarborough) for all local market qualitative research needs.

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Test Market for Mid-Market Study Portland-Auburn, Maine

- **Why Portland-Auburn?**

- DMA Rank 74
- Portland is one of the few mid-sized markets with two MSOs sharing the DMA. Both Adelphia and Time Warner were able to give upfront commitments to license this information.
- As this is a syndicated service (data applicable to and sold to all media), other local Portland media outlets (radio, broadcast TV and newspapers) are actively being pitched.

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Test Study Design

- One phase study
- Address based sample
- All data collected in a mailed survey instrument
- Last birthday person.....one person per household
- Target Sample size 1,500 per year....two releases
- First release was delivered at end of January -- second release to be delivered this month.

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Test Study Objectives

- Ensure demos and product data yielded similar type of results to current syndicated method
- Confirm Radio data conformed at a cume level
- Assess ability to collect Broadcast TV/Cable data (both 7 day cume and daypart information) in a mailed booklet (no diary).
- Process data output via various industry used platforms –Pinpoint (new Scarborough product), STRATA & IMS software platforms

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Test Study Results

- The Portland-Auburn test market study was a success!
- All test objectives stated on the previous slide were accomplished.

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What's Next?

- Scarborough announces 5 additional markets to be delivered on a syndicated basis.

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New Markets

- Bluefield-Beckley, WV
- Columbia, SC
- Reno, NV
- Salisbury-Ocean City, MD
- Johnstown-Altoona, PA

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- Questions?

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