

THE DEFINITIVE STUDY ON CONSUMERS IN THE NEW MEDIA MARKETPLACE

State of Cable and Broadband 2009

The Annual, National Consumer Survey
Tracking Key Trends in the Delivery and
Consumption of Programming and Technology to
the Home Since 1993

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State of Cable and Broadband 2009™

STATE OF CABLE AND BROADBAND 2009™ (SOC&B 2009™) is the 16th edition of the benchmark Horowitz Associates, Inc. annual, national telephone survey of consumers that has tracked key trends in the delivery and consumption of programming and technology to the home since 1993. The study series provides reliable tracking data on consumer trends in the media marketplace. Each year, this study assesses current opportunities and challenges for the deployment of new technologies, the development of new programming, and the roll-out of new services that will impact your acquisition and retention strategies in the coming year.

Consumers are surveyed about the penetration of and future plans regarding television, telephone, and Internet technologies in their homes, brand image and satisfaction with their providers, adoption of new technologies such as DVR, VOD, and HDTVs and programming preferences. The impact of bundling and pricing strategies will on consumers' choices will specifically be addressed. Also this year, the survey will measure the impact of the economy on consumers' attitudes and behaviors vis a vis their home entertainment services.

TOPIC AREAS:

The principal topic areas covered in STATE OF CABLE AND BROADBAND 2009™ include:

- **Telecommunications services—video, voice and data-- in the home:** Penetration of cable, digital cable, satellite, Internet, broadband services, HDTV/HD service, DVR, VOD, Internet phone service and other technologies;
- **The competitive market for cable service, high speed Internet , digital, phone and interactive services,** including current, former and potential digital cable and satellite subscription; the potential impact of competition from alternative providers such as telcos; brand image and satisfaction of the competing providers;
- **The marketing impact of bundling and pricing strategies:** Interest in bundling and how it affects consumers' attitudes towards cable and broadband services; pricing and packaging of the services.
- **Awareness, impact and market potential of new digital and interactive services** (VOD, SVOD, DVR, HDTV, etc.) among non-subscribers, analog subscribers, and satellite subscribers on satisfaction and likelihood to upgrade/subscribe to digital;
- **Configuration of TV in the home:** Number of TVs with cable, digital cable, satellite, DVR, and HD;
- **Programming genres most often watched, favorite TV channels** and information sources used for television programming, including usage of Interactive Program Guides;
- **Trend analysis:** Data from this year's survey are compared with previous years' data.
- **This year:** The impact of today's difficult economy on consumer choices when it comes to the adoption and usage of in-home entertainment.

STUDY DESIGN:

- The STATE OF CABLE AND BROADBAND survey is conducted via telephone among a stratified random sample of the cable universe using cable systems as the primary sampling unit. Sampling points, i.e., cable systems, are chosen at random with probability of selection in proportion to homespassed. Within each sampling point, a random digit dial (RDD) sample is generated from the telephone exchanges covering each cable system.
- 1,500 consumer surveys.

DELIVERABLES:

- The detailed data from the survey. The consumer research data is analyzed in terms of subscription status, media and technology usage, and demographic profiles.
- A comprehensive PowerPoint report of the findings of the study including trend data on key variables, as well as an executive summary.

SCHEDULE:

- Field: November/December 2008.
- Data available beginning of January 2009. Report available January/February 2009.

SUBSCRIPTION AND AUTHORIZATION:

The subscription price for STATE OF CABLE AND BROADBAND 2009™ is \$12,000. Order before November 14, 2008 to take advantage of the Charter Subscriber offer!

- Charter subscribers have input on the design and content of the questionnaire;
- Charter subscribers will be able to receive one custom PPT detailing our data broken out by your viewers/potential viewers, subscribers/potential subscribers;*
- Charter subscribers receive a discount off the study price.

I would like to order STATE OF CABLE AND BROADBAND 2009™ for \$10,800-- a 10% discount of the cost of the study.

I would like to order a custom over-sample in my markets. The sample design of STATE OF CABLE AND BROADBAND 2009™ allows us to conduct surveys for individual clients on customized samples of cable systems or based on a network's distribution. These results are directly comparable to results from the main SOC&B 2009™ study. Additional budget required. Please contact us directly for more information. The data and report from such a customized study would be proprietary.

PLEASE COMPLETE:

Company¹ _____ Contact: _____ Title: _____
Address: _____ City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____ Email: _____

PAYMENT:

CREDIT CARD: TYPE: _____ # _____ EXP. _____
NAME ON CARD: _____

Alternately: PLEASE INVOICE ME (Report will be delivered upon payment)

Authorized Signature: _____

_____ Date: _____

Title: _____

* Note: The ability to provide custom breakouts for specific networks or operators will depend on the actual sample size collected during the survey process. We cannot guarantee statistically reliable sample sizes for networks or operators with small national footprints, but oversamples are available for an additional cost.

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