The Strategic Counsel

ROGERS CABLE

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A Presentation to

Rogers Cable

Research On The Awareness & Usage Of Radio Service Via Cable

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I. Introduction

Introduction

- Gregg, Kelly, Sullivan & Woolstencroft: *The Strategic Counsel* is pleased to present the following topline quantitative research findings to Rogers Cable.

- This presentation is based on a brief telephone survey conducted among 500 Rogers Cable subscribers in Ontario, New Brunswick and Newfoundland.

- The primary objective of this study was to gauge awareness and usage of the ability to access radio services through analog cable services, and to test reactions to the migration of this service to Digital Cable.

- The sample of 500 was weighted to provide a proportionate representation of the views and opinions of Rogers Cable subscribers across the footprint. Unweighted base sizes and their corresponding margins of error are provided in the table below.

	Unweighted n	Margin of error
Total Rogers Markets	500	+/- 4.5
Ontario	300	+/- 5.8
NET Atlantic	200	+/- 7.2
New Brunswick	100	+/- 10.3
Newfoundland	100	+/- 10.3

Introduction

- Please not that throughout this presentation column totals may not sum to 100% due to natural rounding or the allowance of multiple mentions.
- Statistically significant differences are denoted by "↑ ↓" symbols.

II. Detailed Tables

Cable Service Summary

	Weighted	Unweighted		
	Total Cable Subscribers (n=337) %	**Ontario Cable Subscribers (n=300) %**	**New Brunswick Cable Subscribers (n=100) %**	**Newfoundland Cable Subscribers (n=100) %**
NET Rogers Cable	100	100	100	100
Analog Cable	72	70	84	79
Digital Cable	28	↑ 30	16	21

Q.1: How does your household currently receive its television service? Is it through cable, satellite, or both cable and satellite?
Q.2: What company provides your cable television service?
Q.3: Rogers Cable has a digital service called "Rogers Digital Cable." Rogers Digital Cable requires a set top box and includes the Interactive program guide, Digital-quality picture and sound. Does your household currently subscribe to Rogers Digital Cable?

Likelihood Of Subscribing To Rogers Digital Cable Service

	Weighted	Unweighted		
	Total Cable Subscribers (n=238) %	**Ontario Cable Subscribers (n=208) %**	**New Brunswick Cable Subscribers (n=83) %**	**Newfoundland Cable Subscribers (n=77) %**
TOP-2-BOX	**4**	**4**	**2**	**8**
Definitely will	1	1	1	1
Probably will	3	3	1	7
Might or might not	5	4	7	7
Probably will not	18	16	30	25
Definitely will not	72	74	59	60
BOTTOM-2-BOX	**90**	**90**	**89**	**85**
DK/NA	1	1	1	1

Q.4: How likely is it that your household will subscribe to Rogers Digital Cable service in the next six months? Would you say that you definitely will subscribe, probably will subscribe, you might or might not, you probably will not or you definitely will not subscribe?
Base: Analog Cable subscribers

Awareness Of Ability To Access Radio Stations Through Rogers Cable Service

	Weighted	Unweighted		
	Total Cable Subscribers (n=337) %	Ontario Cable Subscribers (n=300) %	New Brunswick Cable Subscribers (n=100) %	Newfoundland Cable Subscribers (n=100) %
Yes, aware	36	37	32	23
Not aware	63	62	68	↑ 77
DK/NA	1	1	-	-

Q.5: Did you know that you can use your Rogers Cable connection to access a variety of AM and FM radio stations by connecting your cable to a receiver, at no extra charge?

Usage Of Rogers Cable To Access Radio Stations

	Weighted	Unweighted		
	Total Cable Subscribers (n=337) %	Ontario Cable Subscribers (n=300) %	New Brunswick Cable Subscribers (n=100) %	Newfoundland Cable Subscribers (n=100) %
Yes, currently do	4	6	4	2
Yes, have in the past	5	5	3	2
No, do not**	91	89	93	96

Q.6: Have you or anyone in your household ever used your Rogers Cable connection to access AM and FM radio stations?
** Re-percentaged to includes those not aware of ability to access radio stations through Rogers Cable

Main Reason For Not Accessing Radio Stations Via Cable

	Cable Subscribers Aware Of Radio Through Cable But Have Never Used It (Weighted) (n=82) %
NET Don't need/want to	**63**
I have a radio/stereo	24
Never had a need for it	14
Not interested/don't care	14
Don't listen to radio	13
Fine with what we have	5
Don't listen to radio enough	4
Don't have time	4
NET Just don't/haven't	**15**
No reason, just don't	6
Never got a round to it	5
Just didn't bother	4
NET Didn't know about/Never thought about it	**10**
Never thought about it	6
Didn't know about it	4
NET Other mentions	**15**
DK/NA	4

Q.7: What is the main reason that you have never used this service?
Base: Those who claim awareness of ability to access radio stations through cable service but who have never used this service

Main Reason For No Longer Accessing Radio Stations Via Cable

	Cable Subscribers Used To Access Radio Through Cable But No Longer Do (Unweighted)** (n=23)[C] %
No interest/didn't want it anymore	18
Radio works fine/good enough	18
Stereo no longer around	12
No reason, just don't	12
Disconnected/moved receiver	11
Don't listen to radio/hardly listen to radio/only listen to radio in the car	11
Other mentions (Responses of 1% or less)	25

Q.7: What is the main reason that you no longer use this service?
Base: Those who no longer access radio stations through cable service
** Unweighted base used to maximize small sample

Likelihood Of Accessing Radio Stations Through Rogers Digital Cable Service

	Digital Cable Subscribers		
	Weighted	Unweighted	
	Total Cable Subscribers (n=95) %	Ontario Cable Subscribers (n=89) %	NET New Brunswick/Newfoundland Cable Subscribers (n=37)[C] %
TOP-2-BOX	**41**	**41**	**40**
Definitely would	17	16	24
Probably would	24	25	16
Might or might not	14	14	16
Probably would not	29	28	32
Definitely would not	17	18	11
BOTTOM-2-BOX	**46**	**46**	**43**
DK/NA	-	-	-

Q.9: If this service was only available through Digital cable, each radio station would have a channel on the on-screen guide. It would provide CD quality audio access to AM and FM radio stations, at no extra charge. How likely would you or someone in your household be to use it this service?
Base: Digital Cable subscribers
C: Caution, small base

Likelihood Of Subscribing To Rogers Digital Cable Service To Access Enhanced Radio Service

	Analog Subscribers			
	Weighted	Unweighted		
	Total Cable Subscribers (n=242) %	Ontario Cable Subscribers (n=211) %	New Brunswick Cable Subscribers (n=84) %	Newfoundland Cable Subscribers (n=79) %
TOP-2-BOX	**6**	**6**	**2**	**7**
Definitely would	1	1	-	1
Probably would	5	5	2	6
Might or might not	11	10	18	15
Probably would not	22	21	30	29
Definitely would not	58	60	49	47
BOTTOM-2-BOX	**80**	**81**	**79**	**76**
DK/NA	3	3	1	1

Q.10: If this service was only available through Digital cable, each radio station would have a channel on the on-screen guide. It would provide CD quality audio access to AM and FM radio stations, at no extra charge. If this service was available, how likely is it that your household would subscribe to Rogers Digital Cable in the next six months? Would you say that you definitely would subscribe, probably would subscribe, you might or might not, you probably would not or you definitely would not subscribe?

Base: Analog Cable subscribers

Likelihood Of Subscribing To Rogers Digital Cable Service To Access Enhanced Radio Service Versus General Likelihood Of Subscribing To Rogers Digital Cable

	Analog Subscribers (n=238)	
	General Likelihood %	**Likelihood In Light Of Enhanced Digital %**
TOP-2-BOX	**4**	**6**
Definitely will/would	1	1
Probably will/would	3	5
Might or might not	5	↑ 11
Probably will not/would not	18	22
Definitely will not/would not	72	↓ 58
BOTTOM-2-BOX	**90**	**80**
DK/NA	1	3

Q.4: How likely is it that your household will subscribe to Rogers Digital Cable service in the next six months? Would you say that you definitely will subscribe, probably will subscribe, you might or might not, you probably will not or you definitely will not subscribe?

Q.10: If this service was only available through Digital cable, each radio station would have a channel on the on-screen guide. It would provide CD quality audio access to AM and FM radio stations, at no extra charge. If this service was available, how likely is it that your household would subscribe to Rogers Digital Cable in the next six months? Would you say that you definitely would subscribe, probably would subscribe, you might or might not, you probably would not or you definitely would not subscribe?

Base: Analog Cable subscribers