

# Preface

This is the second phase of a primetime unaided recall study conducted by Nielsen Media Research during the month of April 2000. As is the case with Phase 1, Nielsen utilized a telephone coincidental in order to capture primetime commercial recall on an **unaided basis**.

Overall, the results are remarkably consistent with Phase 1— that is, recall parity exists between broadcast and cable network television.

Two characteristics distinguish this second phase:

- 1) A marked increase in sample size— from 5,700 adults 18+ in February, to 17,200 in April. The tripling of sample size provides greater overall confidence and stability in the data, and allows us to segment the data and still retain healthy sample counts. Indeed, we are unaware of any similar telephone coincidental of this size and scope.
- 2) We have explicitly captured on-air tune-in promotional advertisements. By doing so, we are able to compare national product/service ads to on-air promotions. By capturing tune-in promotions we are also able to examine broader television research issues such as the impact of pod length and pod position on recall.

# Executive Summary

There is a long-standing debate in the TV advertising business as to the relative commercial effectiveness of shows airing on broadcast versus those on cable—which is similar to [if not synonymous with] the debate over the relative value of rating size. The issue of broadcast versus cable has intensified over the past several years given the dramatic shift in viewing, leading advertising agencies to search for qualitative values to assign individual media elements.

During the month of April 2000, the Cabletelevision Advertising Bureau addressed this issue by commissioning Nielsen Media Research to conduct a nationwide telephone coincidental survey. More than 17,000 adults 18+ were contacted at home during primetime viewing hours. Based on estimates compiled by Nielsen, here are the top-line findings:

- The claimed commercial exposure rate for broadcast network TV is 67.9%, which is 2.7 percentage points higher than cable's 65.2%. Given the sample sizes attained in Phase 2, the difference, although small, is statistically significant at the 90% confidence interval.
- There is no statistically significant difference between broadcast and cable network television on the basis of unaided recall [14.5% vs 14.9%].
- There is no statistically significant difference between broadcast and cable network television on the basis of the total number of ads recalled correctly per respondent [1.13 vs 1.09].

- The attentiveness levels for cable and broadcast viewers are very similar. 83.9% of all cable viewers were paying full/some attention to the program; 83.1% for broadcast viewers.

- Attentiveness levels are a strong predictor of unaided recall. For those viewers paying full attention to the program, their unaided recall rate is 17.0%. For those paying little/or no attention, the recall rate falls to 10.1%.

Beyond broadcast versus cable comparisons, we have also collected relative recall values touching upon a variety of TV research issues:

- The recall value of :15s is one-half that of :30s. That is precisely the same relationship between on-air tune-in promotions versus advertised products/services.

- Commercial pod length and pod position have a tremendous impact on unaided recall. Not surprisingly, we have found that shorter pod lengths, as well as the first pod position command higher than average recall levels. The last pod position also has above-average recall.

- It would be an oversimplification to assume the existence of only one static set of recall values for pod length and pod position. Since these two variables are intertwined with one another, there are in fact many sets of relative recall values, and they depend entirely upon which variable is held constant. Thus, for example, the recall index for all commercials appearing within the first pod position is 148; but within a pod length of five [and only five] commercials, the first pod position index drops to 125.

# Methodology— Telephone Survey

102,505 nationwide random digit dial phone calls were placed during primetime, which yielded a total response of 17,184 adults 18+. Taking into account that several randomly generated phone numbers were either non-working or non-residential, Nielsen Media Research was able to attain an overall cooperation rate of approximately 30%. Calls were placed within the Eastern, Central and Pacific time zones between the dates of April 4th through April 26th. Calling was suspended on April 23rd during the Easter holiday.

The telephone survey was structured in order to ensure that Nielsen spoke with a randomly selected household member 18 years and older. In order to do so, Nielsen asked to speak with

the person watching television **with the most recent birthday.**

A number of questions were asked of in-home TV viewers—the most important of which were:

- 1) What network or station were you watching or listening to when the phone rang?
- 2) What is the name of the television program you were watching or listening to?
- 3) Were you watching or listening to this program when the last commercial break aired?

If respondents answered “Yes” to question 3 above, they were then asked:

**Please tell me the name of anything you saw or heard advertised during the last commercial break.**

It should be noted that we reviewed this methodology with several top level agency research executives. Their expert advice was invaluable in shaping our overall approach and questionnaire design.

In order to ensure the representation of program viewing after 10pm, Nielsen Media Research placed a number of permission calls. In other words, calls were made prior to 10pm in order to ask permission to re-contact the household after 10pm local time. There was no hint or suggestion as to the nature of the follow-up call.

## VERIFICATION OF RECALL RESPONSES

Approximately two to three weeks after completion of the phone survey, Nielsen verified responses through their Monitor Plus commercial logs.

Importantly, since Nielsen Monitor Plus captures national commercials **exclusively**, this study was confined to the verification of national commercials airing on broadcast and cable. In other words, respondents may have correctly identified local commercials, but these responses were excluded from the final tabulations.

When a respondent claimed that he or she was watching a television program **at the last commercial break**, it was critical for Nielsen to identify this break in order to assess the accuracy of recall responses. By time stamping when the phone call took place [and matching network and program information provided by the respondent] Nielsen was able to identify which commercial pod the respondent was referring to.

# Primary Findings & Discussion

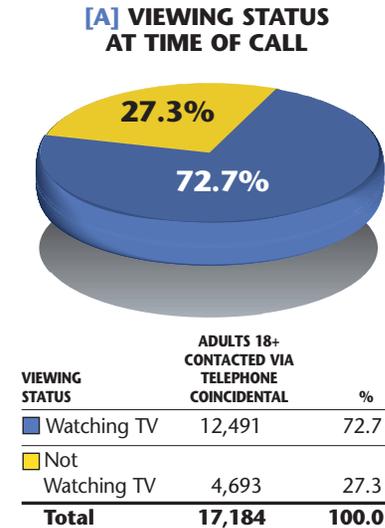
## I. OVERALL VIEWING

Of the 17,184 adults contacted during primetime, 12,491 adults 18+ were viewing television when the call was placed [which represents 72.7% of all respondents]. [A] As was the case in Phase 1 [75.7% viewing], the Phase 2 April usage level is higher than normative HUT/PUT levels generated by Nielsen's People Meter sample. But it should be kept in mind that national People Meter viewing levels include those who are not home/not viewing, whereas this study's telephone sample reflects an in-home condition only.

## II. CLAIMED COMMERCIAL EXPOSURE

When the telephone call was placed, there were 6,198 adults viewing broadcast network television. Of these, 67.9% [or, 4,210 respondents] claimed to be viewing during the last commercial break. [B] The claimed commercial exposure rate for cable is 65.2% [or, 2,673 viewing commercial break out of 4,099 total cable network viewers at time of call]. [C]

The claimed commercial exposure to broadcast network television is 4% higher than that of cable. Given the large sample sizes attained in Phase 2, the slight difference is, in fact, statistically different at the 90% confidence interval. But, in our

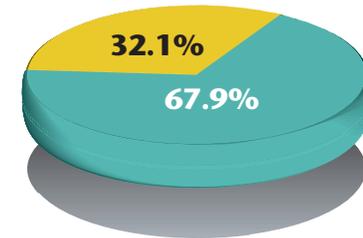


opinion, a 2.7 percentage point spread still runs contrary to an assumption held by some that ad-supported cable viewers zap through the channel spectrum in order to avoid commercials.

*Primary Findings & Discussion continued on next page*

## [B] CLAIMED COMMERCIAL EXPOSURE

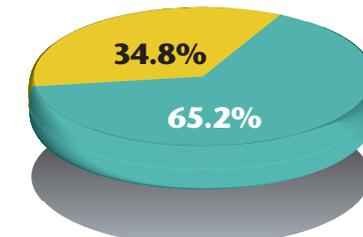
### BROADCAST NETWORK TV



CLAIMED COMMERCIAL EXPOSURE	# ADULTS 18+	%
Viewers Watching At Break	4,210	67.9
Viewers Not Watching At Break	1,988	32.1
<b>Total</b>	<b>6,198</b>	<b>100.0</b>

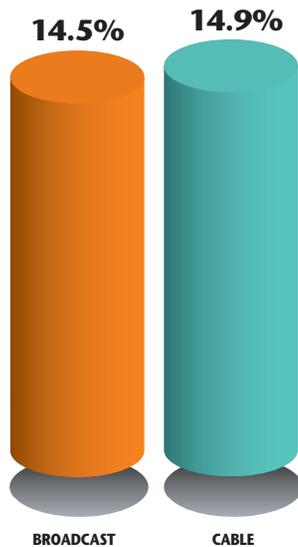
## [C] CLAIMED COMMERCIAL EXPOSURE

### AD-SUPPORTED CABLE TV



CLAIMED COMMERCIAL EXPOSURE	# ADULTS 18+	%
Viewers Watching At Break	2,673	65.2
Viewers Not Watching At Break	1,426	34.8
<b>Total</b>	<b>4,099</b>	<b>100.0</b>

# Primary Findings & Discussion Continued



**[D]**  
**VERIFIED RECALL**

	BROADCAST	CABLE
# Correct Respondents	538	376
# Viewers Watching At Break	3,701	2,531
<b>% Verified Recall</b>	<b>14.5%</b>	<b>14.9%</b>

**[E]**  
**VERIFIED RECALL ON CABLE TV SETS ONLY**

	BROADCAST	CABLE
# Correct Respondents	381	376
# Viewers Watching At Break	2,691	2,531
<b>% Verified Recall</b>	<b>14.2%</b>	<b>14.9%</b>



## III. VERIFIED RECALL

3,701 broadcast network viewers were exposed to a national commercial break with identifiable commercials captured by Monitor Plus. Of these, 538 viewers were able to correctly identify at least one commercial, which represents a 14.5% verified recall response rate. **[D]**

The verified recall response rate for cable is 14.9%, i.e., 376 correct respondents out of 2,531 respondents exposed to a national break. Although the cable network recall rate is 2% higher than the broadcast rate, there is no significant difference between the two figures [90% confidence interval]. **[D]**

The figures for broadcast TV represent viewing on both cable **and** non-cable television sets. Since ad-supported cable programming cannot be received on non-cable sets, we have also tabulated the unaided recall rate for broadcast viewing on cable television sets only, which are typically the primary set within the home. **[E]**

*Primary Findings & Discussion  
continued on next page*

# Primary Findings & Discussion Continued

## IV. TOTAL CORRECT RECALL RESPONSES

A minority of respondents was able to provide us with multiple correct recall responses. For broadcast network television, 538 viewers were able to correctly recall 608 commercials, or 1.13 correct ads per respondent. For ad-supported cable television, 376 viewers were able to correctly recall 408 commercials, or 1.09 correct ads per respondent. **Given the level of sampling error, there is no significant difference between these two recall ratios [90% confidence interval]. [F]**

[F]  
TOTAL ADS RECALLED PER RESPONDENT



BROADCAST CABLE

# Total Ads Recalled Correctly	608	408
# Correct Respondents	538	376
<b>Ads Recalled Per Respondent</b>	<b>1.13</b>	<b>1.09</b>

# Attentiveness

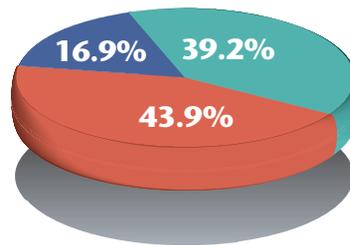
## V. ATTENTIVENESS LEVELS

Respondents who claimed they were watching a program were asked: “Which best describes how much attention you paid to the program overall?” The distribution of responses, from “Full” to “No” attention, is very similar for cable and broadcast network television. **[G & H]**

In our opinion, when a viewer chooses a program [whether cable or broadcast] that choice is a very personal one based on the individual’s unique interests, curiosity, etc. Moreover, the sheer number of people, i.e., rating size, watching that program throughout the country should not impact the individual viewer’s state of mind or attentiveness level. The data to the right support this common sense assumption.

*Attentiveness continued  
on next page*

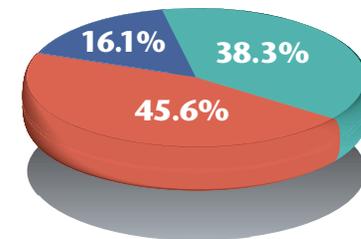
**[G]**  
**ATTENTIVENESS LEVELS**  
**BROADCAST NETWORK TV**



ATTENTIVENESS LEVEL	# A18+	%
Full Attention	2,696	43.9
Some Attention	2,408	39.2
Little/No Attention	1,039	16.9
<b>Total</b>	<b>6,143</b>	<b>100.0</b>

Base: Viewers who were watching program.

**[H]**  
**ATTENTIVENESS LEVELS**  
**AD-SUPPORTED CABLE TV**



ATTENTIVENESS LEVEL	# A18+	%
Full Attention	1,854	45.6
Some Attention	1,560	38.3
Little/No Attention	655	16.1
<b>Total</b>	<b>4,069</b>	<b>100.0</b>

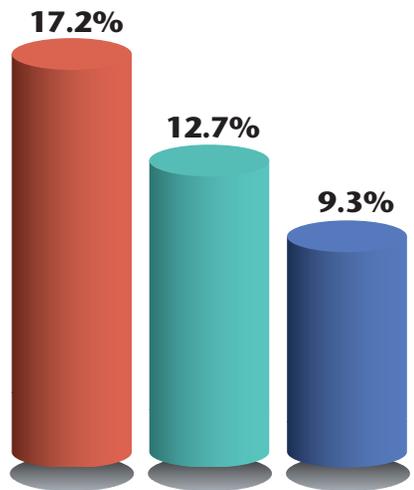
Base: Viewers who were watching program.

# Attentiveness

Continued

## [I] RECALL AS A FUNCTION OF ATTENTIVENESS

### BROADCAST NETWORK TV

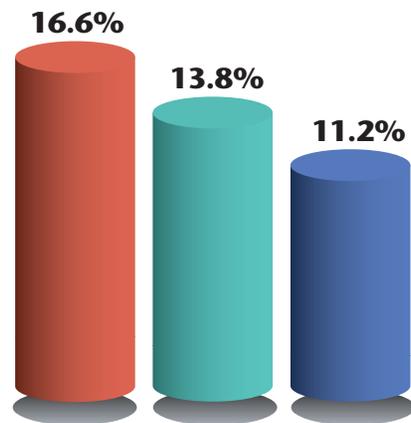


	FULL ATTENTION	SOME ATTENTION	LITTLE/NO ATTENTION
# Correct Respondents	316	179	40
# Viewers Watching At Break	1,837	1,414	431
<b>% Verified Recall</b>	<b>17.2%</b>	<b>12.7%</b>	<b>9.3%</b>

Base: Viewers who were watching during last commercial break.

## [J] RECALL AS A FUNCTION OF ATTENTIVENESS

### AD-SUPPORTED CABLE TV

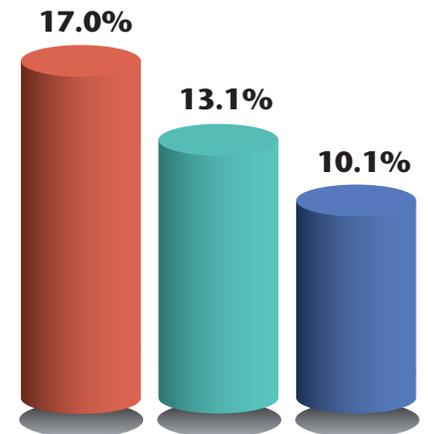


	FULL ATTENTION	SOME ATTENTION	LITTLE/NO ATTENTION
# Correct Respondents	208	133	34
# Viewers Watching At Break	1,251	964	304
<b>% Verified Recall</b>	<b>16.6%</b>	<b>13.8%</b>	<b>11.2%</b>

Base: Viewers who were watching during last commercial break.

## [K] RECALL AS A FUNCTION OF ATTENTIVENESS

### BROADCAST AND AD-SUPPORTED CABLE TV COMBINED



	FULL ATTENTION	SOME ATTENTION	LITTLE/NO ATTENTION
# Correct Respondents	524	312	74
# Viewers Watching At Break	3,088	2,378	735
<b>% Verified Recall</b>	<b>17.0%</b>	<b>13.1%</b>	<b>10.1%</b>

Base: Viewers who were watching during last commercial break.

# Attentiveness

Continued

## VI. RECALL AS A FUNCTION OF ATTENTIVENESS

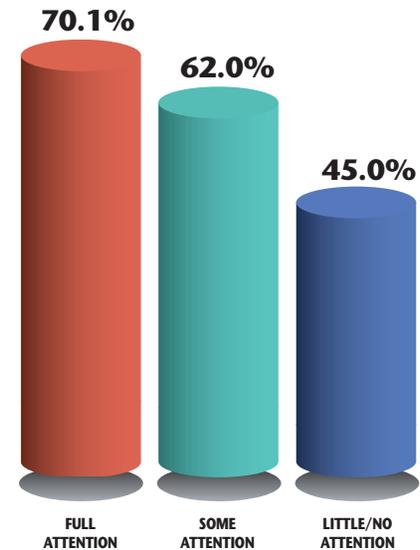
As was the case in Phase 1, we continue to find a very strong link between attentiveness levels and recall [see graphs on page 8]. [I, J, K]

In Phase 2, we also captured commercial exposure as a function of attentiveness. As is the case with verified recall, we found a very strong link between attentiveness and commercial exposure. [L]

### [L] COMMERCIAL EXPOSURE AS A FUNCTION OF ATTENTIVENESS BROADCAST AND AD-SUPPORTED CABLE TV COMBINED

	FULL ATTENTION	SOME ATTENTION	LITTLE/NO ATTENTION
# Viewers			
Watching At Break	3,188	2,461	762
# Total Viewers	4,550	3,968	1,694
<b>% Watching At Break</b>	<b>70.1%</b>	<b>62.0%</b>	<b>45.0%</b>

Base: Viewers who were watching program.



# Exposure & Recall

## VII. COMMERCIAL EXPOSURE AND RECALL ON CABLE AND NON-CABLE TV SETS

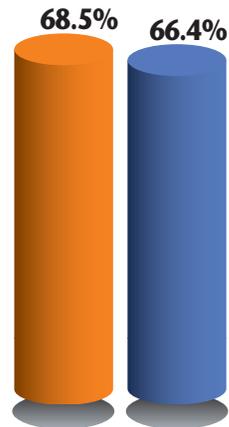
Our survey calls into question the assumption held by some that viewing within a multi-channel cable universe is subject to more channel-surfing than within a non-cable universe, where there are only a handful of viewing options. The fewer viewing options, so this logic goes, render the non-cable universe likely to have higher commercial exposure and recall.

The data for broadcast viewing do not support this hypothesis. Indeed, we found no significant differences between the two universes on the basis of commercial exposure, verified recall or correct ads per respondent.

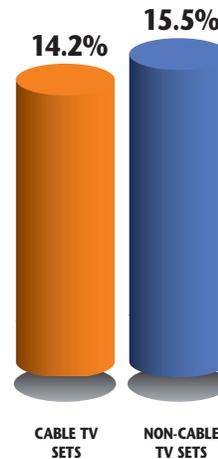
[M, N, O]

### [M] BROADCAST VIEWING ON CABLE AND NON-CABLE TV SETS

#### CLAIMED COMMERCIAL EXPOSURE



	CABLE TV SETS	NON-CABLE TV SETS
# Viewers Watching At Break	3,061	1,149
# Total Viewers	4,467	1,731
<b>% Commercial Exposure</b>	<b>68.5%</b>	<b>66.4%</b>

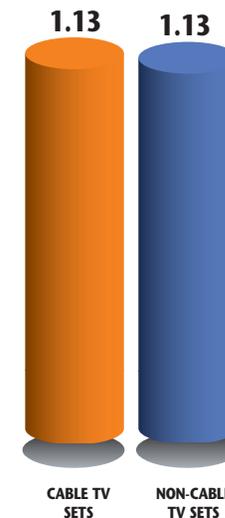


### [N] VERIFIED RECALL

	CABLE TV SETS	NON-CABLE TV SETS
# Correct Respondents	381	157
# Viewers Watching At Break	2,691	1,010
<b>% Verified Recall</b>	<b>14.2%</b>	<b>15.5%</b>

### [O] TOTAL BROADCAST ADS RECALLED PER RESPONDENT

	CABLE TV SETS	NON-CABLE TV SETS
Total Ads Recalled Correctly	431	177
# Correct Respondents	381	157
<b>Ads Recalled Per Respondent</b>	<b>1.13</b>	<b>1.13</b>



# Commercial Description

## VIII. DESCRIPTION OF COMMERCIALS RECALLED

A total of 1,016 commercials were correctly identified on an unaided recall basis. Broadcast viewers identified 608 commercials, of which 275 represent different brand executions. Cable viewers identified 408 commercials, of which 265 represent different brand executions.

There is a marked similarity in the commercials identified by broadcast and cable viewers on the basis of commercial length. For example, the average length of all ads recalled by cable viewers is 29.8 seconds; for broadcast 27.7 seconds. To the right is the distribution of ads recalled by commercial length. [P]

Ads recalled by broadcast and cable viewers occupied similar positions within the commercial break. To the right is the distribution of commercials by pod positions. [Q]

Lastly, broadcast and cable viewers were exposed to similar pod configurations. On average, broadcast viewers were exposed to a pod length of 6.1 commercials; cable viewers 5.9 commercials. It should be noted, however, that broadcast viewers recalled more ads within pods configured with 5-8 ads [73.4% vs. 51.7% for cable], whereas cable viewers recalled more ads within pods configured with nine or more ads [24.3% vs. 13.3% for broadcast]. [R]

### [P] DISTRIBUTION OF ADS RECALLED BY COMMERCIAL LENGTH

Broadcast Network TV			Ad-Supported Cable TV		
COMMERCIAL LENGTH	TOTAL COMMERCIALS RECALLED CORRECTLY	PERCENT DISTRIBUTION	COMMERCIAL LENGTH	TOTAL COMMERCIALS RECALLED CORRECTLY	PERCENT DISTRIBUTION
:10s	0	0.0%	:10s	4	1.0%
:15s	120	19.7%	:15s	58	14.2%
:30s	473	77.8%	:30s	317	77.7%
:45s	4	0.7%	:45s	1	0.2%
:60s	11	1.8%	:60s	28	6.9%
<b>Total</b>	<b>608</b>	<b>100.0%</b>	<b>Total</b>	<b>408</b>	<b>100.0%</b>

### [Q] DISTRIBUTION OF ADS RECALLED BY POD POSITION

Broadcast Network TV			Ad-Supported Cable TV		
COMMERCIAL POSITION WITHIN POD*	TOTAL COMMERCIALS RECALLED CORRECTLY	PERCENT DISTRIBUTION	COMMERCIAL POSITION WITHIN POD*	TOTAL COMMERCIALS RECALLED CORRECTLY	PERCENT DISTRIBUTION
1st or 2nd position	264	43.4%	1st or 2nd position	176	43.1%
3rd or 4th position	199	32.8%	3rd or 4th position	110	27.0%
5th or 6th position	126	20.7%	5th or 6th position	71	17.4%
7th position or higher	19	3.1%	7th position or higher	51	12.5%
<b>Total</b>	<b>608</b>	<b>100.0%</b>	<b>Total</b>	<b>408</b>	<b>100.0%</b>

\*In order to determine ad position within pod, the above tables include all national tune-in promotional ads captured by Monitor Plus. Note: "Total Commercials Recalled Correctly" column excludes all such ads.

### [R] DISTRIBUTION OF ADS RECALLED BY POD LENGTH

Broadcast Network TV			Ad-Supported Cable TV		
TOTAL POD LENGTH*	TOTAL COMMERCIALS RECALLED CORRECTLY	PERCENT DISTRIBUTION	TOTAL POD LENGTH*	TOTAL COMMERCIALS RECALLED CORRECTLY	PERCENT DISTRIBUTION
1-4 ads	81	13.3%	1-4 ads	98	24.0%
5-8 ads	446	73.4%	5-8 ads	211	51.7%
9+ ads	81	13.3%	9+ ads	99	24.3%
<b>Total</b>	<b>608</b>	<b>100.0%</b>	<b>Total</b>	<b>408</b>	<b>100.0%</b>

\*In order to determine commercial pod length, the above tables include all national tune-in promotional ads captured by Monitor Plus. Note: "Total Commercials Recalled Correctly" column excludes all such ads.

# Television Recall Values

## IX. RELATIVE RECALL VALUES FOR TELEVISION

The database compiled by Nielsen contains a wealth of information and insights into the relative recall values of pod length [or clutter], pod position, :30s vs. :15s and product/service ads vs. on-air promotions.

### POD LENGTH

Commercial pod length has a tremendous impact on recall. Not unexpectedly, the fewer ads per pod, the greater the recall.

For example, commercials appearing in the shortest pod length of 1 to 3 ads have a 57% higher recall [157 index] than the average recall across all commercials. Commercials that ran within a pod length of ten or more ads attained a recall index of only 79. [S]

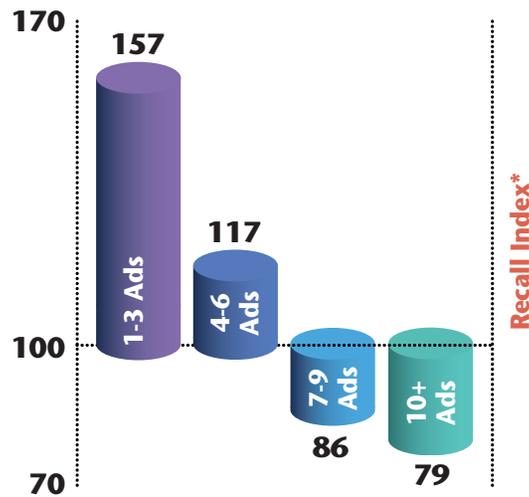
It is too simplistic, however, to think of the recall/clutter relationship as a static set of recall indices as illustrated to the right. And that's because pod length [or clutter] is intertwined with the issue of pod position, which also has an impact on recall. [We know, for example,

that the first pod position attains higher than average recall levels.] Thus, commercials that run within a pod length of three ads have a one-third chance of falling within the first [premium] recall position, whereas the same commercials have only a one-tenth chance of landing in the first position within a 10-ad pod.

By holding the pod position constant, we find the same general relationship between recall and clutter, but the relative recall values [indices] change significantly. Thus, for example, a commercial that airs in the first position within a pod length of 1 to 4 ads attains a recall index of 256! The same **first position** commercial within a pod length of 7 or more ads drops to a recall index of 57. [T]

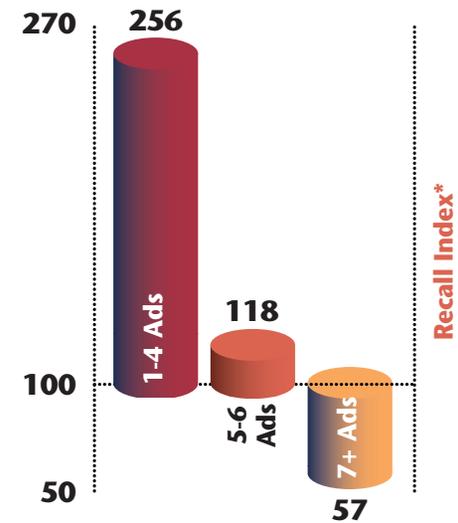
*Television Recall Values continued on next page*

[S] RECALL AS A FUNCTION OF POD LENGTH  
BROADCAST AND AD-SUPPORTED CABLE TV COMBINED



\*Recall Indices based on all commercials set at 100 index.

[T] RECALL AS A FUNCTION OF POD LENGTH  
FOR ALL 1<sup>ST</sup> POSITION ADS ONLY



\*Recall Indices based on all first position commercials set at 100 index.

# Television Recall Values

Continued

## POD POSITION

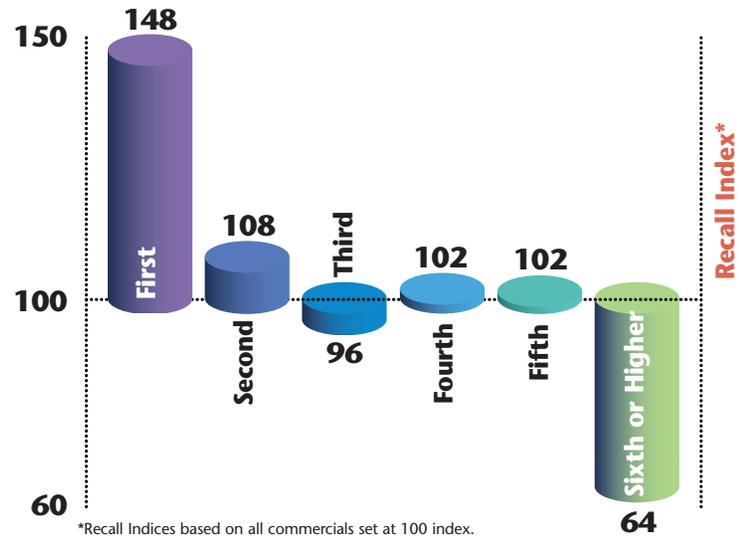
Pod position has a significant impact on commercial recall. As a general rule, the first position commands a premium recall value. [U]

It is critical, however, to control for pod length when trying to establish relative recall values by pod position. For example, a commercial falling within the first position can in fact appear in any pod configuration, including shorter length, i.e., better recall, pods. That is not true for a commercial appearing in, say, the 6th position, which – by definition – can only appear in pod lengths of 6 ads or greater, i.e., higher clutter/ lower recall.

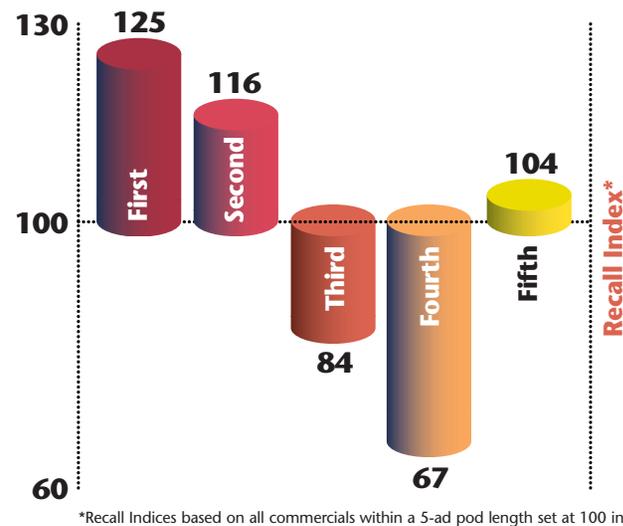
As an example, we have selected commercials appearing in 5-ad pods and, as can be seen to the right, a different pattern emerges. The first pod position still captures the highest recall [125 index], but now the last pod [5th position] also has an above-average recall [104] index. [V]

Television Recall Values  
continued on next page

[U] RECALL AS A FUNCTION OF POD POSITION  
BROADCAST AND AD-SUPPORTED CABLE TV COMBINED



[V] RECALL AS A FUNCTION OF POD POSITION  
FOR ALL 5-AD PODS ONLY



# Television Recall Values *Continued*

## **:30s vs. :15s**

During the mid-1980s, the research literature was filled with recall studies on shorter length units. At the time, :15s were considered to have about 75% the recall value of :30s. As can be seen to the right, our research indicates the value to be one-half. **[W]**

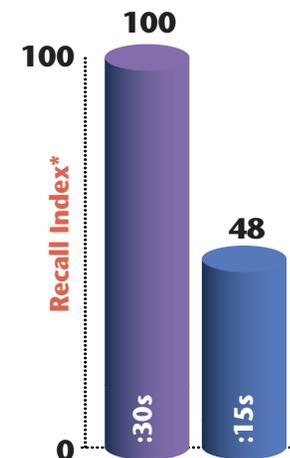
Our assumption is that :15s may be at a slight disadvantage since they appear in longer commercial pods than :30s. On average, :15s ran in commercial pod lengths of 6.75 ads vs. 6.28 ads for :30s. In our opinion, the extra 7% clutter, i.e., 6.75 divided by 6.28, may act to a small degree as a recall “anchor” on :15s.

Another assumption, which was not supported by the data, was that :15s occupied less desirable pod positions than :30s. It turns out, however, that :15s tend to appear in greater proportion within the first and last pod positions, neither of which would seem to place :15s at a recall disadvantage.

More research needs to be done in this area. We have no doubt that :15s are inferior to :30s on an unaided recall basis. But, we would like to make the distinction between: **a)** the inherent communication value [or effectiveness] between the two; and, **b)** circumstances such as pod length, which may impact the relative value between the two. In order to truly assess :15s vs. :30s, one must at minimum control for pod length.

*Television Recall Values  
continued on next page*

## **[W] RELATIVE RECALL VALUE OF :30s vs. :15s BROADCAST AND AD-SUPPORTED CABLE TV COMBINED**

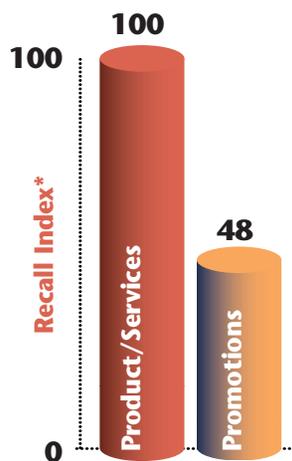


\*Recall Index has been set at 100 for all :30 second commercials. Index for :15 second commercials derived by dividing :15 recall by :30 recall and then multiplying by 100.

# Television Recall Values *Continued*

## [X] RELATIVE RECALL VALUE OF PRODUCT/SERVICE vs. ON-AIR PROMOTIONAL ADS

### BROADCAST AND AD-SUPPORTED CABLE TV COMBINED



\*Recall Index has been set at 100 for all product/service commercials. Index for promotional ads derived by dividing promotional recall by product/service recall and then multiplying by 100.

## PRODUCT/SERVICE COMMERCIALS vs. ON-AIR TUNE-IN PROMOTIONS

As can be seen at left, there is a significant difference between the recall of advertiser-based product/service commercials, versus promotional ads typically produced by TV networks. [X]

As is the case with :15s vs. :30s, one should also consider the impact of clutter. On-air promos appeared within an average pod length of 6.5 ads vs. 6.1 ads for product/service commercials. As for pod position, promos do not appear to be at any disadvantage since they occupy a disproportionate number of first and last pod positions.

In our opinion, product/service ads attain superior recall levels because the viewer can easily differentiate between them. Indeed, it would probably be a scheduling mistake to find two similar and direct competitive ads within the same commercial break. In contrast, the vast majority of on-air tune-in promotions are not quite so distinguishable from one another. They tend to fall within one category— that is, information about upcoming programming. In addition, promotional ads are not typically supported with the same level of GRPs as commercials sponsored by advertisers. The lower advertising weight may well lead to lower recall.

# Conclusion

Based on the results from Phase 2, we can state unequivocally that ad-supported cable TV and broadcast have very similar recall patterns.

Importantly, the data provide empirical support and justification for the numerous advertisers who have significantly increased their spending on cable.

In the face of steadily eroding primetime shares, the broadcast industry has maintained that their programming still provides a better commercial environment than cable's. Their assumption is captured in the phrase, "bigger is better."

As is the case with Phase 1, our Phase 2 findings do not support this assumption.

Two plausible explanations for the parity we have found—beyond the essential fact that we're dealing with the exact same medium:

- 1) Since cable programming offers greater targeting opportunities, it may well be that brand commercials are better matched with particular cable shows than they are for broadcast;

- 2) There is a crucial link between attentiveness and recall. High attentiveness equals high recall; low attentiveness equals low recall. We have found in Phase 1 and 2 that broadcasters have no monopoly on attentive viewers. And why should they? In our opinion, the attentiveness of any given viewer should not be influenced by such external factors as the number of people throughout the country who happen to be viewing the same show.

In Phase 2, we have also gained numerous insights into a variety of television recall issues, such as pod length, pod position, shorter length commercial units and product/service vs. promotional ads. Perhaps the most valuable insight we can offer the advertising community is that these issues cannot be thought of in isolation. They are, in fact, very much related to one another.

***The complete respondent database for this study is available on CAB's Web site [[www.cabletvad-bureau.com](http://www.cabletvad-bureau.com)] to allow you to further explore recall issues.***