



Television
Audience
2009

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Television Audience 2009

The 50th edition of Television Audience continues your collection of TV Audience reports.

This report continues to include annual trends of population and television ownership as well as trends of available tuning/viewing sources. General and seasonal viewing trends are included along with a summary of program types across dayparts. Ethnic trends in viewing are included as well. Please see the appendix for notes on individual charts for clarification.

A Note Regarding Channels Receivable

Channels receivable and viewed has been a popular feature in the Television Audience Report for many years. Recently, however the way that channels are presented by different multi-channel providers has evolved.

In an analog world, one channel generally represented a single viewing source. With the growth and evolution of digital television technology this is no longer the case. For example, one provider may offer fifty different VOD content choices via fifty individual channel positions, while another provider may offer the same fifty VOD choices via a single "channel" on an interactive menu. In the first case we might count fifty channels with three viewed, while in the second case, although the same options existed and the same number were actually viewed, we would detect and report one channel offered and one viewed. There are multiple examples of this situation including Digital Music Channels and Pay per View, etc.

With nearly two thirds of all homes receiving multi-channel digital service today either through digital cable, Telco or DBS, there is no consistent means of measuring of how many programming sources are available to the homes. We have therefore removed this reporting from the Television Audience Report.

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This service is not part of a regular syndicated rating service accredited by the Media Ratings Council (MRC), and The Nielsen Company has not requested accreditation. The Nielsen Company does provide one or more syndicated services which are accredited by the MRC.

The Household and Persons Audience estimates in Television Audience 2009 have been derived from various National Reports and certain special analyses.

These audience estimates are based upon projections from The Nielsen Company survey measurements as described in National Service Reports and the Reference Supplement, subject to the definitions and reminders therein. Additional copies of these definitions and reminders will be furnished upon request.

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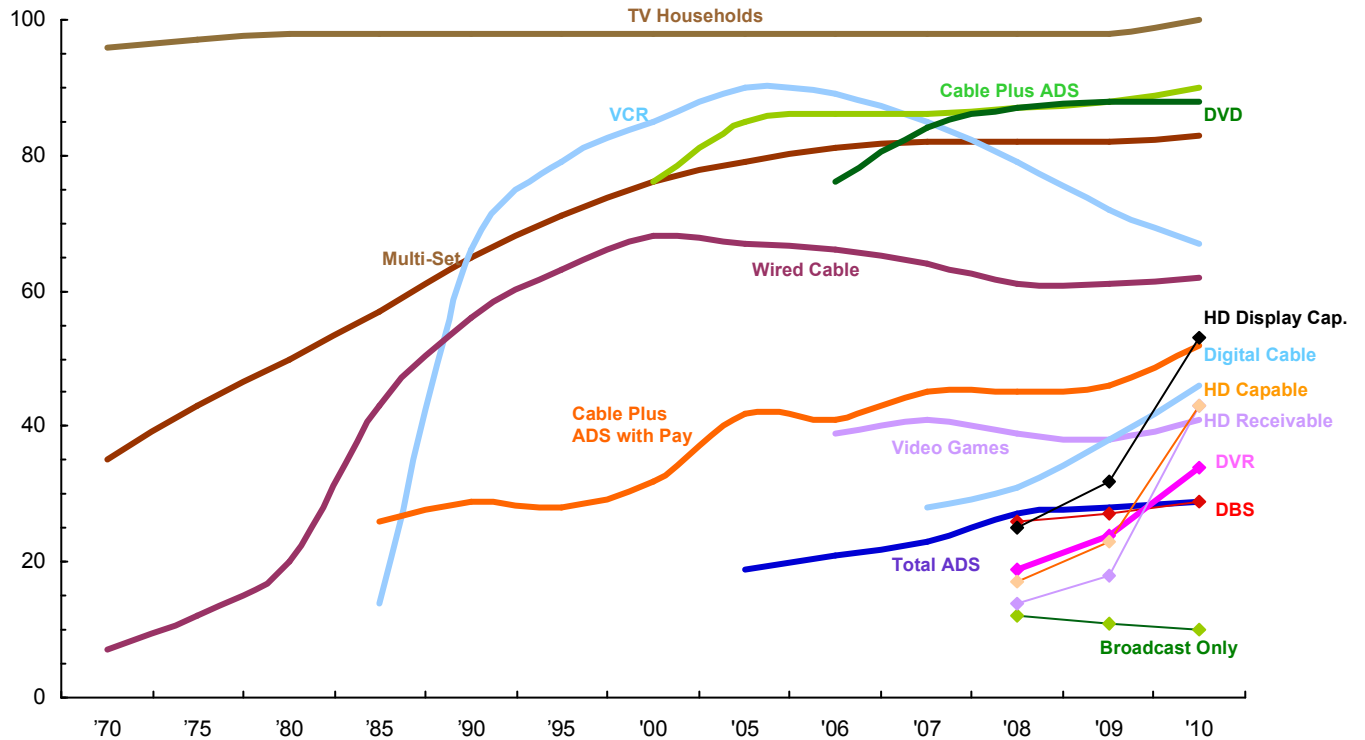
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Growth of Television Ownership

% of TV Households

Each September, The Nielsen Company releases current estimates of television's audience and its characteristics.

The most significant increases from the previous year continue to be seen in digital cable, DVR and HD receivable and HD capable homes. VCR penetration and Broadcast Only homes continue to decline.



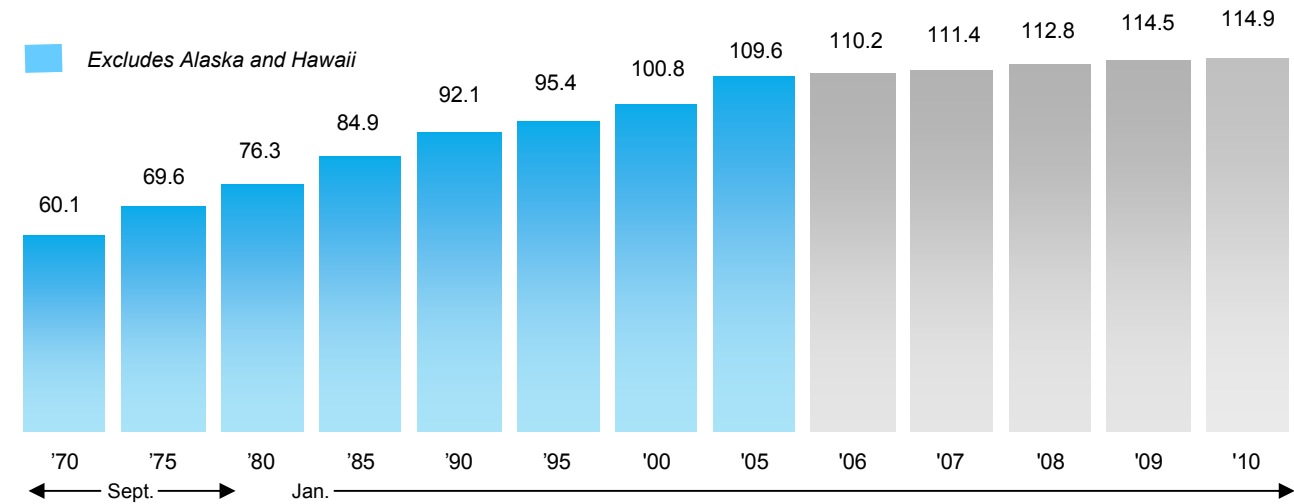
Key:	'70	'75	'80	'85	'90	'95	'00	'05	'06	'07	'08	'09	'10
% of TV Households	96	97	98	98	98	98	98	98	98	98	98	98	98
Broadcast Only	—	—	—	—	—	—	—	—	—	—	12	11	9
Wired Cable	7	12	20	43	56	63	68	67	66	64	61	61	62
Cable Plus ADS	—	—	—	—	—	—	76	85	86	86	87	88	90
Cable Plus ADS w/Pay	—	—	—	26	29	28	32	42	41	45	45	46	52
Total ADS	—	—	—	—	—	—	—	19	21	23	27	28	29
Digital Cable	—	—	—	—	—	—	—	—	—	28	31	38	46
DBS	—	—	—	—	—	—	—	—	—	—	26	27	29
DVR	—	—	—	—	—	—	—	—	—	—	19	24	34
HD Receivable	—	—	—	—	—	—	—	—	—	—	14	18	43
HD Capable	—	—	—	—	—	—	—	—	—	—	17	23	46
HD Display Capable	—	—	—	—	—	—	—	—	—	—	25	32	53
Multi-Set	35	43	50	57	65	71	76	79	81	82	82	82	83
DVD	—	—	—	—	—	—	—	—	76	84	87	88	88
Video Games	—	—	—	—	—	—	—	—	39	41	39	38	41
VCR	—	—	—	14	66	79	85	90	89	85	79	72	65



Television Audience 2009

Trends in Television Ownership

TV Households in Millions

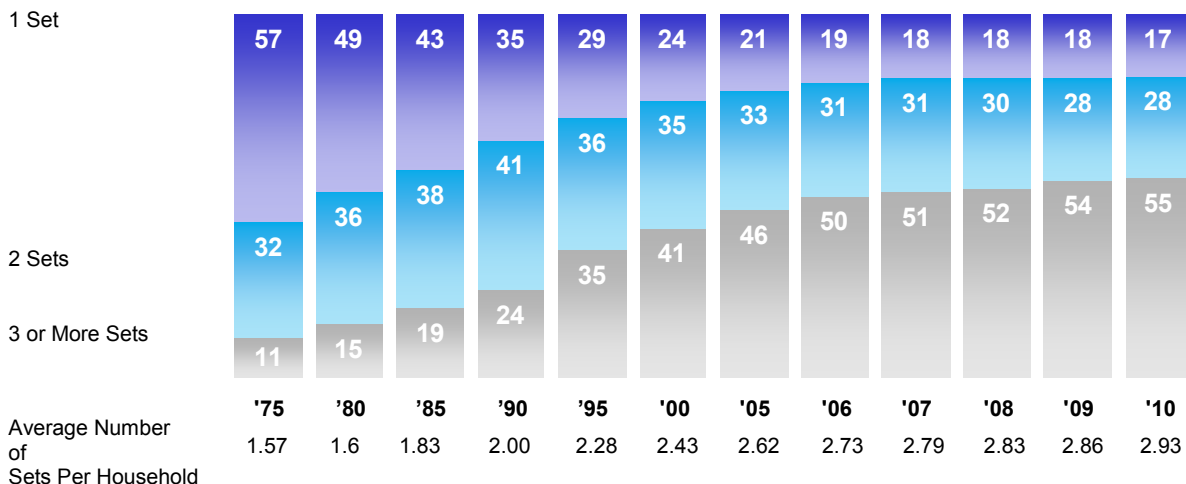


	'70	'75	'80	'85	'90	'95	'00	'05	'06	'07	'08	'09	'10
Wired Cable	3.9	8.6	15.2	36.3	51.9	60.5	68.6	73.9	73.2	71.4	69.3	70.2	71.2
Cable Plus ADS	—	—	—	—	—	—	—	—	94.8	96.2	98.5	100.9	103.8
Cable Plus ADS w/Pay	—	—	—	21.8	27.1	27.1	31.8	46.3	45.6	49.7	51.2	52.9	59.2
Total ADS	—	—	—	—	—	—	—	20.8	22.7	25.8	30.2	31.7	33.5
Digital Cable	—	—	—	—	—	—	—	—	—	30.8	35.5	43.0	52.6
DBS	—	—	—	—	—	—	—	—	22.1	25.1	29.5	31.2	33.1
DVR	—	—	—	—	—	—	—	—	—	—	21.0	28.0	39.2
Multi-Set	20.8	30.0	38.3	48.2	60.1	67.6	76.2	86.6	89.5	91.9	93.0	94.0	95.8
DVD	—	—	—	—	—	—	—	—	84.0	93.3	98.0	101.2	100.6
Video Games	—	—	—	—	—	—	—	—	43.0	46.0	44.4	43.2	47.4
VCR	—	—	—	11.5	60.7	75.8	85.8	98.9	97.7	95.2	88.8	82.6	74.3

Television Set Ownership

% of TV Households

Number of Sets per Household



Note: Current data based on Universe Estimates as of January 1, 2010



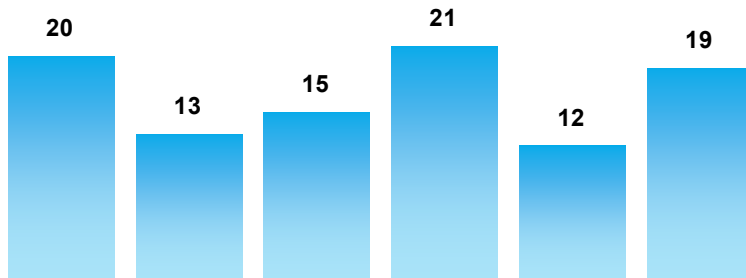
Television Audience 2009

Geographic Breakdown

Territory

Northeast	East Central	West Central	South East	South West	Pacific
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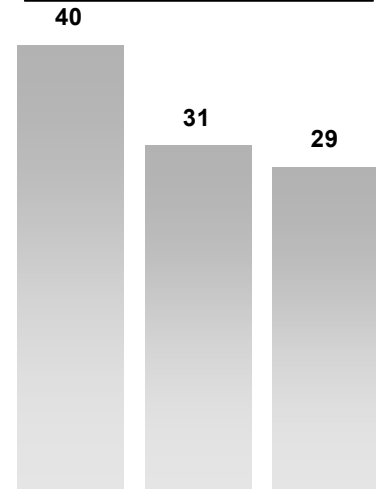
%
Distribution of
Total TV
Households



% of TV Households

County Size

A	B	C & D
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% Penetration

Territory	Wired Cable	Cable Plus ADS	Cable Plus ADS w/Pay	Total ADS	DBS	DVR	DVD	Digital
Northeast	79	95	56	17	17	32	90	63
East Central	63	89	45	27	26	32	89	43
West Central	56	86	47	30	30	28	88	36
Southeast	61	92	49	32	31	27	87	38
Southwest	53	85	49	34	33	33	88	32
Pacific	58	88	51	31	30	37	90	43

County Size

County Size	Wired Cable	Cable Plus ADS	Cable Plus ADS w/Pay	Total ADS	DBS	DVR	DVD	Digital
A	68	91	57	23	23	35	90	55
B	66	89	47	24	23	31	89	45
C & D	51	89	44	39	39	26	86	27

Television Audience 2009

Household Characteristics

% of TV Households

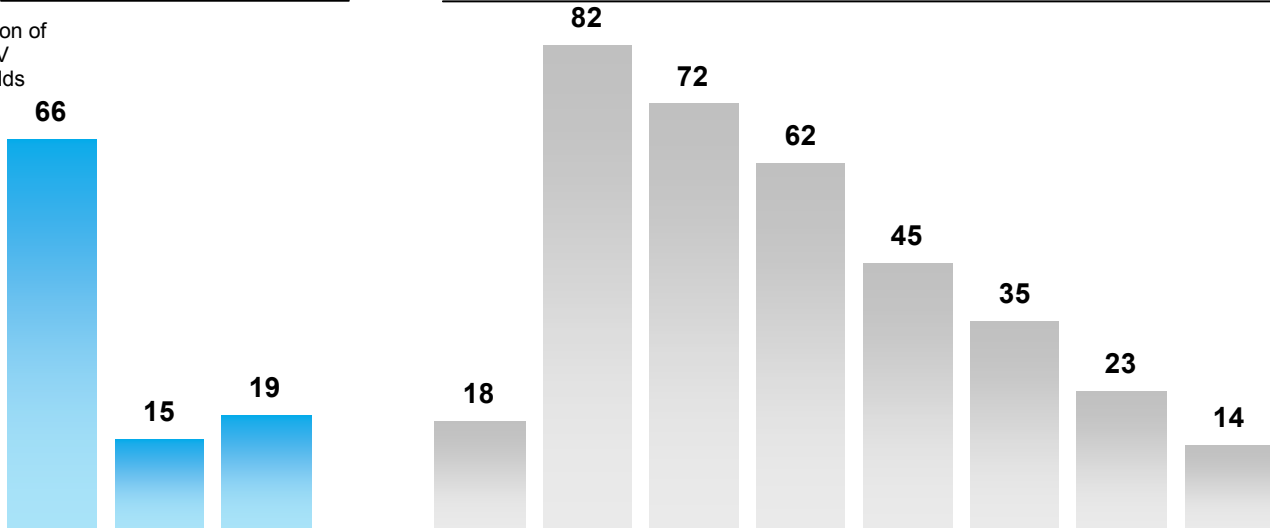
Presence of Non-Adults

None Under18 2-5 6-17

Household Income (\$000)

Under 20 20+ 30+ 40+ 60+ 75+ 100+ 125+

% Distribution of Total TV Households



% Penetration

Presence Of Non-Adults	Wired Cable	Cable Plus ADS	Cable Plus ADS w/Pay	Total ADS	DBS	DVR	DVD	Digital
None Under 18	64	89	49	26	25	29	86	44
2-5	57	89	51	33	33	37	92	41
6-17	61	91	53	31	31	37	95	46

HH Income(\$000)

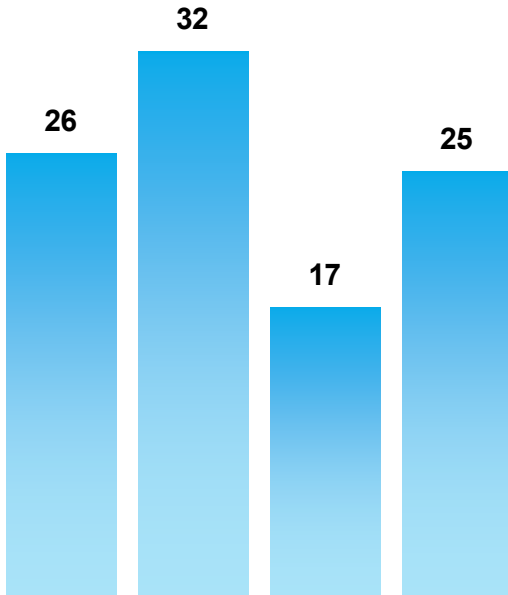
HH Income(\$000)	Wired Cable	Cable Plus ADS	Cable Plus ADS w/Pay	Total ADS	DBS	DVR	DVD	Digital
Under 20	58	78	34	20	20	12	75	29
20+	63	92	53	30	29	36	92	47
30+	64	93	56	30	30	38	93	49
40+	65	94	58	30	30	41	94	51
60+	66	95	61	30	30	45	95	54
75+	69	96	63	28	28	48	95	57
100+	71	97	66	26	26	51	96	61
125+	72	97	68	26	25	54	96	63

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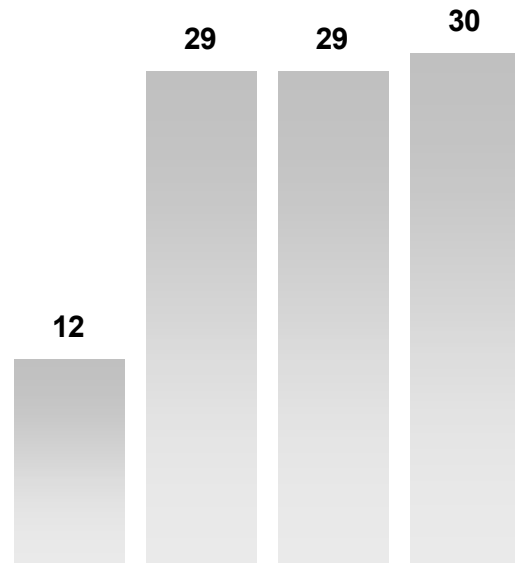
Household Characteristics

% of TV Households

Household Size			
1	2	3	4+



Education of Head of House			
0-3 Yrs. H.S.	4 Yrs. H.S.	1-3 Yrs. College	4+ Yrs. College



% Penetration

HH Size	Wired Cable	Cable Plus ADS	Cable Plus ADS w/Pay	Total ADS	DBS	DVR	DVD	Digital
1	66	85	39	19	19	19	79	39
2	62	91	53	29	29	33	90	45
3	64	92	55	29	29	37	93	47
4+	58	91	55	34	34	39	94	44

Education of Head of House

Education of Head of House	Wired Cable	Cable Plus ADS	Cable Plus ADS w/Pay	Total ADS	DBS	DVR	DVD	Digital
0-3 Yrs. H.S.	53	83	42	31	31	18	80	31
4 Yrs. H.S.	59	88	48	30	30	26	87	38
1-3 Yrs. College	62	91	51	29	29	34	91	44
4+ Yrs. College	69	92	54	24	23	40	92	54

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Trend of Actual Population Growth

TV Households in Millions

The number of television households and the size of each demographic group continue to increase, with the exception of Adults 18-49 and Teens 12-17. Adults 50+ had the largest increase compared to the previous year.

	1970	1975	1980	1985	1990	1995	2000	2005	2006	2007	2008	2009	2010
TV Households	60.1	69.6	76.3	84.9	92.1	95.4	100.8	109.6	110.2	111.4	112.8	114.5	114.9
Adults 18-49	79.2	89.0	97.4	109.8	118.7	122.2	124.5	129.9	130.0	130.6	131.0	131.9	131.6
Adults 50+	45.8	51.7	54.9	58.6	61.5	64.9	73.2	83.9	85.9	88.1	90.2	92.5	94.7
Children 2-11	38.9	34.8	31.8	32.9	35.5	38.2	39.8	39.6	40.0	40.1	40.2	40.7	41.1
Teens 12-17	23.3	24.7	22.8	21.1	19.6	21.3	22.5	24.6	24.7	24.8	24.7	24.7	24.6
Men 18+	58.6	66.5	72.1	79.8	85.6	89.2	94.7	102.7	103.8	105.3	106.7	108.3	109.3
Women 18+	66.5	74.2	80.2	88.6	94.6	97.8	103.0	111.1	112.0	113.3	114.5	116	117

Projections of Population Growth to 2050

TV Households in Millions

The Nielsen Company projects Universe Estimates to the year 2050. Black, Hispanic and Asian projections to the year 2050 can be found on page 9.

	Universe Estimates		January 1 Projections							
	1/1/2010	2011	2015	2020	2025	2030	2035	2040	2045	2050
TV Households	114.9	116.3	122.1	129.2	136.3	143.3	150.0	156.6	163.2	169.9
Adults 18-49	131.6	131.8	132.6	135.9	140.7	146.6	151.8	157.1	162.5	169.5
Adults 50+	94.7	97.0	105.7	114.3	121.8	128.6	136.0	143.2	150.0	155.6
Children 2-11	41.1	41.6	43.1	45.0	46.7	48.1	49.5	51.4	53.5	55.7
Teens 12-17	24.6	24.5	24.9	26.3	27.6	28.8	29.8	30.7	31.8	33.1
Men 18+	109.3	110.6	115.4	121.2	127.2	133.2	139.2	145.2	151.1	157.2
Women 18+	117	118.2	123.0	129.0	135.4	141.9	149.0	155.0	161.4	167.9

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Projections of Ethnic Population Growth to 2050

TV Households in Millions

Black

	Universe Estimates		January 1 Projections							
	1/1/2010	2011	2015	2020	2025	2030	2035	2040	2045	2050
TV Households	14.0	14.2	15.0	16.2	17.3	18.5	19.6	20.8	22.1	23.4
Adults 18-49	17.5	17.6	18.1	18.9	19.9	21.0	21.7	22.5	23.1	24.1
Adults 50+	9.5	9.9	11.1	12.5	13.7	15.0	16.4	18.0	19.7	21.0
Children 2-11	6.7	6.7	7.0	7.4	7.7	7.9	8.1	8.4	8.8	9.2
Teens 12-17	3.8	3.8	3.7	3.9	4.1	4.4	4.5	4.6	4.8	5.0
Men 18+	11.9	12.2	13.0	14.1	15.2	16.3	17.4	18.5	19.7	20.8
Women 18+	15.0	15.3	16.2	17.3	18.5	19.6	20.8	22.0	23.1	24.3

Hispanic

	Universe Estimates		January 1 Projections							
	1/1/2010	2011	2015	2020	2025	2030	2035	2040	2045	2050
TV Households	13.0	13.4	15.3	18.0	20.8	23.9	27.3	30.8	34.5	38.5
Adults 18-49	23.1	23.7	26.1	29.4	33.0	37.0	41.2	46.0	51.0	56.4
Adults 50+	7.8	8.3	10.2	13.0	16.0	19.2	22.3	25.4	28.8	33.0
Children 2-11	8.8	9.0	9.9	11.0	12.3	13.8	15.3	16.8	18.3	19.9
Teens 12-17	4.6	4.7	5.3	6.2	6.9	7.6	8.5	9.4	10.4	11.3
Men 18+	15.9	16.4	18.6	21.5	25.0	28.3	32.0	36.0	40.0	44.3
Women 18+	15.1	15.6	17.8	21.0	24.2	28.0	31.6	36.0	40.0	45.0

Asian

	Universe Estimates		January 1 Projections							
	1/1/2010	2011	2015	2020	2025	2030	2035	2040	2045	2050
TV Households	4.8	5.0	5.6	6.5	7.5	8.5	9.5	10.6	11.7	12.8
Adults 18-49	7.4	7.6	8.3	9.2	10.0	11.0	12.0	13.0	14.1	15.3
Adults 50+	4.0	4.2	5.0	6.2	7.6	9.0	10.5	12.0	13.3	15.0
Children 2-11	1.9	2.0	2.2	2.3	2.5	2.7	3.0	3.3	3.6	4.0
Teens 12-17	1.2	1.2	1.3	1.5	1.6	1.8	1.9	2.1	2.3	2.5
Men 18+	5.6	5.8	6.5	7.5	8.6	9.7	10.8	12.0	13.2	14.5
Women 18+	5.8	6.0	6.8	7.9	9.0	10.3	11.5	12.8	14.2	15.6

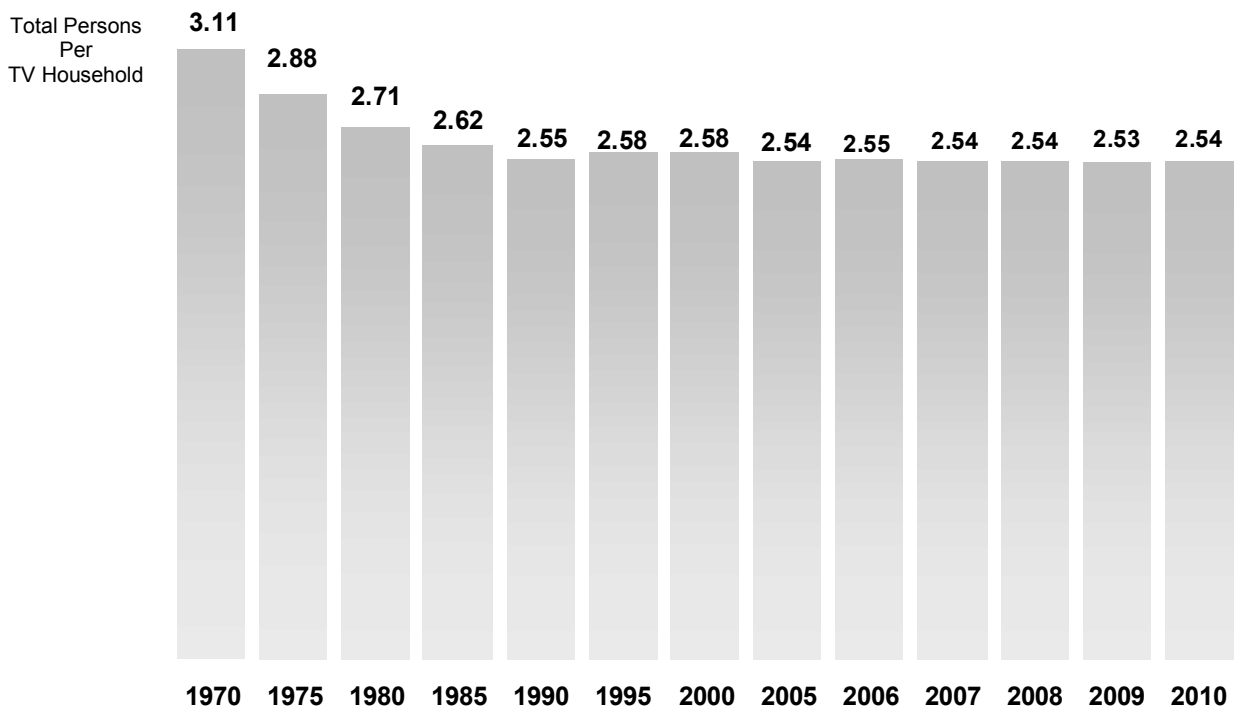
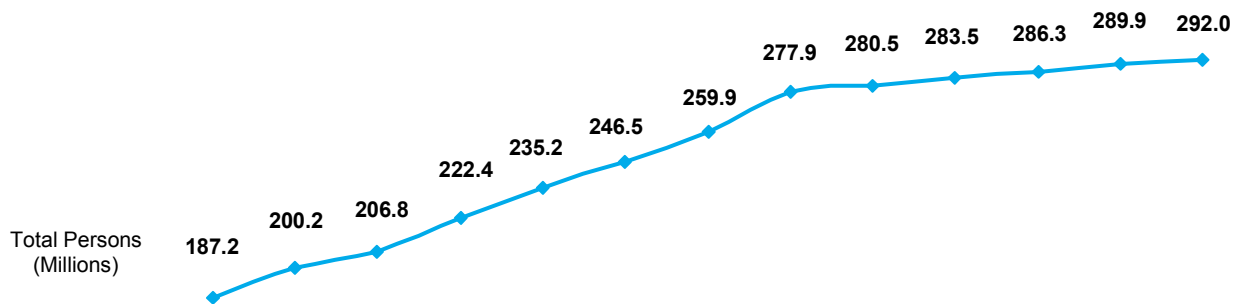
Note: Current data based on Universe Estimates as of January 1, 2010

Television Audience 2009

Trend of Total Persons

Persons 2+ Per TV Household

The Total Persons 2+ population continues to increase while the Total Persons per TV Household remains relatively constant since 1990 at just over 2.5 people.



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Population

Demographic Breakdown

Persons Per 100 TV Households

The 50-64, 55-64 and 65+ age groups have increased since 2009. Teens have decreased. All other groups have remained constant since 2009.

Persons	1975	1980	1985	1990	1995	2000	2005	2006	2007	2008	2009	2010
2-5 Years	19	16	16	16	17	15	14	14	14	14	14	14
6-11 Years	31	25	23	23	23	24	22	22	22	21	21	21
12-17 Years	36	30	25	21	22	22	22	22	22	22	22	21
18-34 Years	79	81	79	73	67	61	60	60	60	59	59	59
35-49 Years	49	47	50	55	61	63	59	58	57	56	55	55
35-54 Years	66	61	63	68	75	80	77	76	76	74	74	74
50-64 Years	44	42	38	35	36	41	45	46	47	47	48	49
55-64 Years	28	27	26	23	22	23	27	28	28	29	29	30
65+ Years	30	30	31	32	32	32	32	32	32	32	32	33
Total Persons	288	271	262	255	258	258	254	255	254	253	253	254

Demographic Trends of Adults

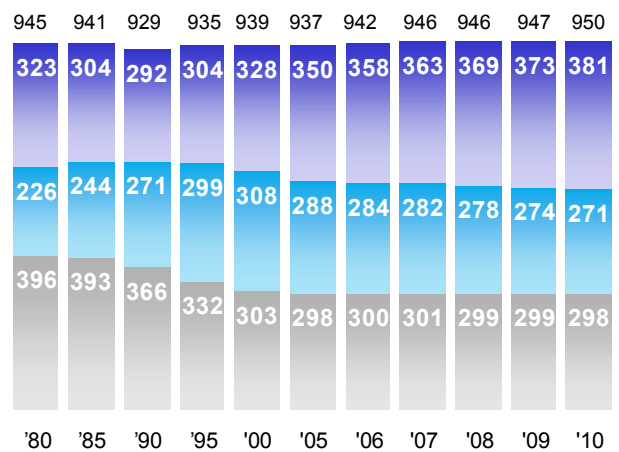
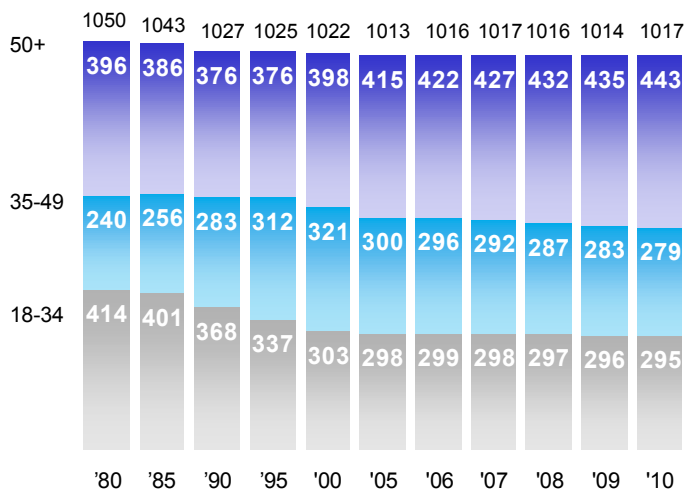
Persons Per 1000 TV Households

Total women and men demographic has increased. Women continue to outnumber men in 50+ and 35-49, yet men slightly outnumber women in the 18-34 demographic group. The 50+ demographic for both genders continues to increase, as the younger demographics continue to decline.

Women

Men

Total

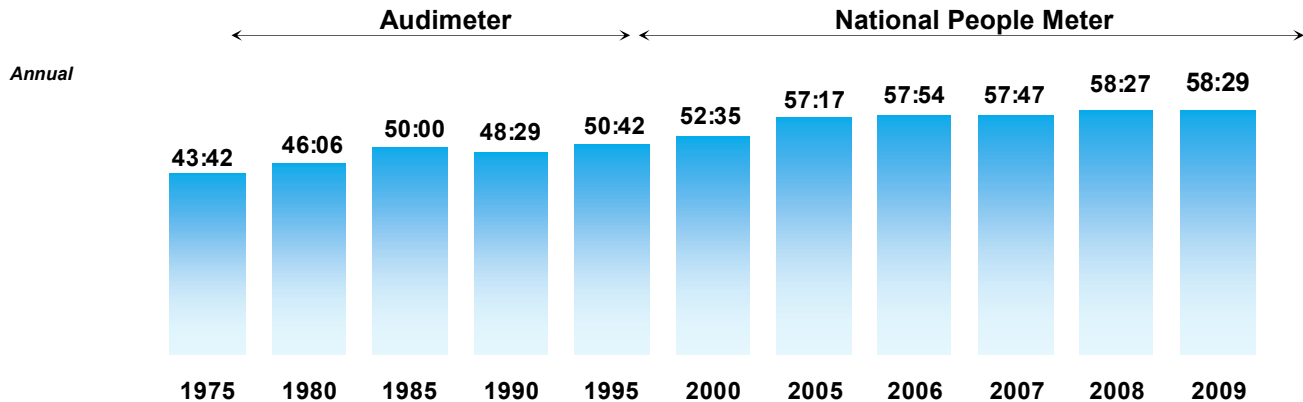


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Household Tuning Total Day

Tuning per TV Household per Week (Hours:Minutes)

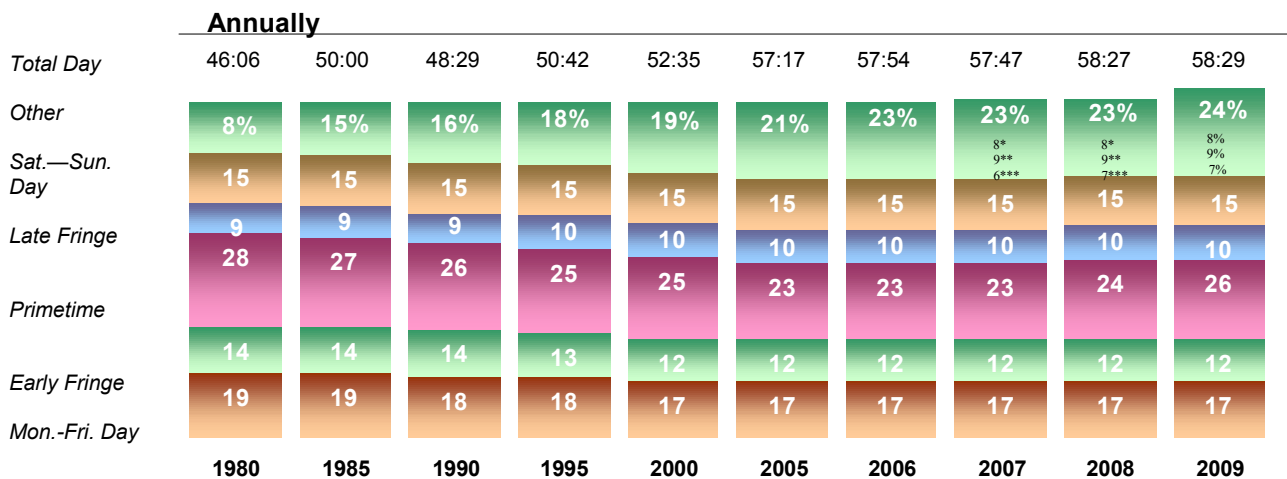
During the 2008-09 season, household tuning averaged 58 hours and 29 minutes per week, a 2 minute increase from the previous year, equal to over 8 hours of tuning per day.



Distribution by Dayparts

Tuning per TV Household per Week (Hours:Minutes)

Distribution of tuning by daypart has remained relatively consistent. Primetime remains the most tuned daypart and also increased 2% from the previous year.



*Overnight, **Early Morning, ***Remainder

Note: Current data based on 2008-2009 data based on viewing from 9/22/08-9/20/09. Household data based on Total Day Live+7 HUT viewing.

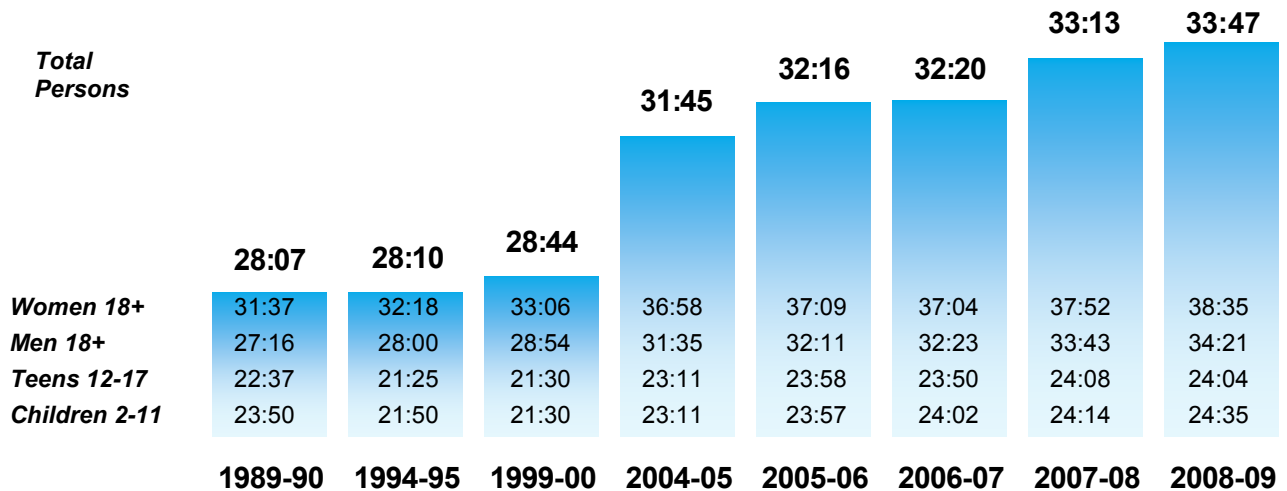
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Persons Viewing Annual Trend

Viewing per TV Household per Week (Hours:Minutes)

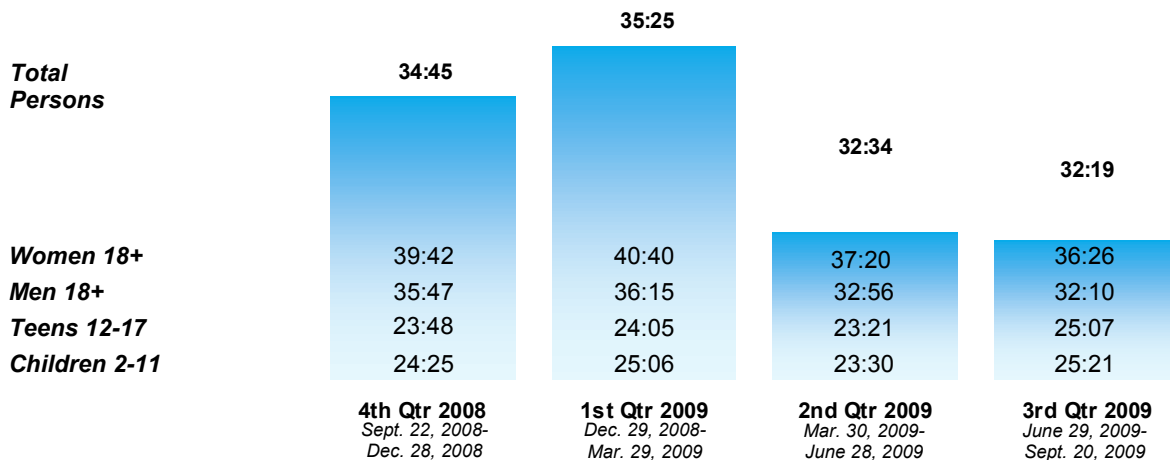
During the 2008-2009 season, the amount of time the average person spent viewing increased from last year. The viewing levels have increased since the previous year, with the exception of Teens, which decreased 4 minutes.



Persons Viewing Quarterly Trend

Viewing per TV Household per Week (Hours:Minutes)

Total persons viewing was the highest during the first quarter, with an average of 34 hours and 45 minutes. Viewing was lowest during the third quarter at 32 hours and 19 minutes. First quarter emerges as the heaviest viewing period for both Women and Men 18+. Viewing is the highest for Teens 12-17 and Children 2-11 in the third quarter, corresponding with summer break from schools.



Note: Current data based on 2008-2009 data based on viewing from 9/22/08-9/20/09.
Persons data based on Live PUT viewing, plus DVR playback.
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Share Trends of Viewing Sources Total Day, Primetime, Daytime, Late Night

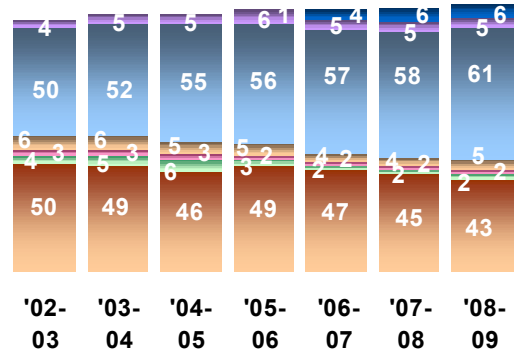
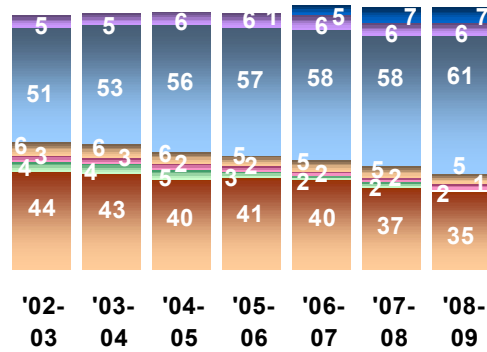
Share of Total US TV Households

Ad-Supported Cable share of TV Households has increased from the previous year across Total Day, Primetime, Daytime and Late Night, while Network Affiliate Viewing Sources continue to decrease.

Total Day
Monday - Sunday 6am - 6am

Primetime
Monday - Saturday 8-11pm
Sunday 7-11pm

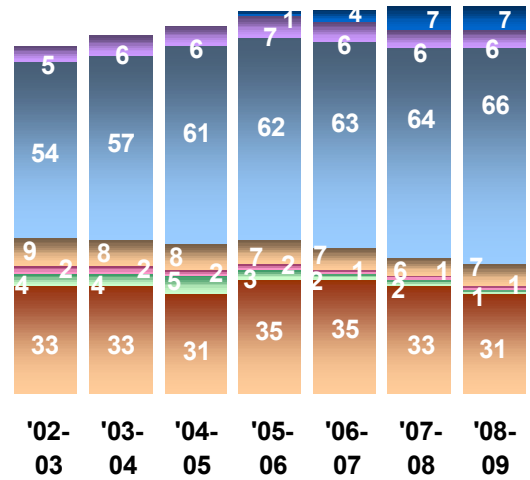
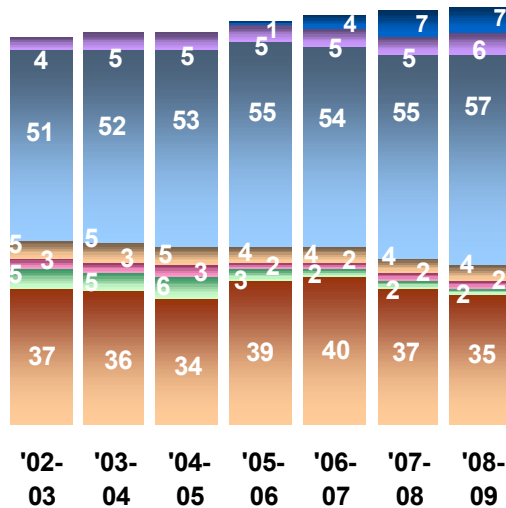
- All Other Tuning
- All Other Cable
- Ad Supported Cable
- Premium Pay
- Public
- Independent
- Network Affiliates



Daytime
Monday - Friday 10am - 4:30pm

Late Night
Monday - Sunday 11:30pm - 1am

- All Other Tuning
- All Other Cable
- Ad Supported Cable
- Premium Pay
- Public
- Independent
- Network Affiliates

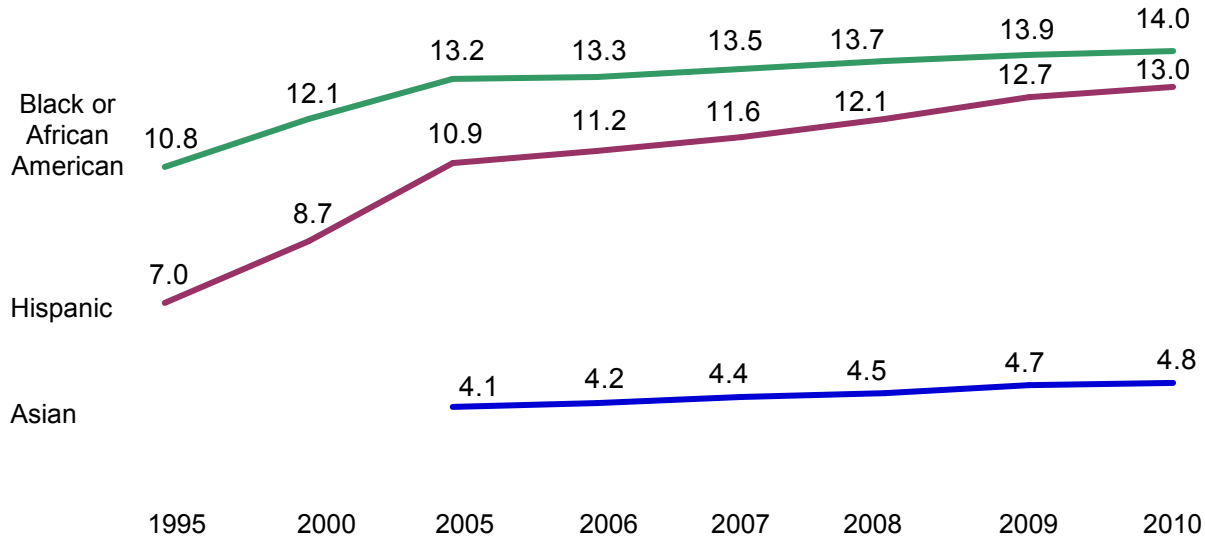


Television Audience 2009

Ethnic—Trend of TV Population Growth

TV Households in Millions

In 2010, the number of Black, Hispanic and Asian television households continue to increase.



Ethnic—Persons Breakdown

Persons Per 1000 TV Households

Persons							
2-17 Years	2000	2005	2006	2007	2008	2009	2010
Composite	618	586	587	582	576	572	572
Black or African American	806	777	781	748	737	748	749
Hispanic	1126	1081	1069	1049	1050	1033	1034
Asian	—	—	—	714	699	663	646
Adults 18+ Years	2000	2005	2006	2007	2008	2009	2010
Composite	1961	1950	1959	1963	1962	1961	1969
Black or African American	1862	1890	1899	1897	1898	1906	1927
Hispanic	2295	2403	2393	2396	2386	2386	2390
Asian	—	—	—	2409	2409	2391	2384
Total Persons	2000	2005	2006	2007	2008	2009	2010
Composite	2579	2536	2545	2545	2538	2532	2542
Black or African American	2668	2667	2680	2645	2635	2652	2676
Hispanic	3421	3484	3462	3446	3436	3420	3423
Asian	—	—	—	3123	3108	3054	3029

Television Audience 2009

Ethnic—Trends in Ethnic TV Penetration

% of TV Households

Composite	Cable Plus ADS	Cable Plus ADS w/Pay	DBS	DVR	DVD	VCR
2000	76	39	—	—	—	85
2005	85	42	—	—	—	90
2006	86	41	—	—	76	89
2007	86	45	23	—	84	85
2008	87	45	26	19	87	79
2009	88	46	27	24	88	72
2010	90	52	29	34	88	65

Black	Cable Plus ADS	Cable Plus	DBS	DVR	DVD	VCR
2000	67	46	—	—	—	72
2005	80	52	—	—	—	86
2006	82	53	—	—	—	83
2007	84	54	18	—	86	79
2008	84	54	23	15	86	68
2009	84	52	23	18	86	63
2010	88	57	23	24	85	55

Hispanic	Cable Plus ADS	Cable Plus	DBS	DVR	DVD	VCR
2000	61	41	—	—	—	84
2005	70	41	—	—	—	79
2006	71	39	—	—	—	74
2007	76	41	25	—	82	69
2008	81	45	30	13	88	69
2009	81	44	33	19	87	61
2010	84	45	33	27	86	54

Asian	Cable Plus ADS	Cable Plus ADS w/Pay	DBS	DVR	DVD	VCR
2000	—	—	—	—	—	—
2005	—	—	—	—	—	—
2006	—	—	—	—	—	—
2007	81	37	15	—	91	84
2008	83	39	20	21	91	76
2009	86	40	23	26	88	68
2010	88	51	24	37	89	61

Television Audience 2009

Ethnic—Trends in Television Ownership

TV Households in Millions

Composite	Composite	Cable Plus ADS	Cable Plus ADS w/Pay	DBS	DVR	DVD	VCR
2000	100.8	76.6	38.8	—	—	—	85.8
2005	109.6	93.1	46.3	—	—	—	98.9
2006	110.2	94.8	45.6	—	—	—	97.7
2007	111.4	96.2	49.7	25.1	—	93.3	95.2
2008	112.8	98.5	51.2	29.5	21.0	98.0	88.8
2009	114.5	100.9	52.8	31.2	27.9	101.1	82.5
2010	114.9	103.8	59.2	33.0	39.2	100.6	74.3

Black	Composite	Cable Plus ADS	Cable Plus ADS w/Pay	DBS	DVR	DVD	VCR
2000	12.1	8.1	5.5	—	—	—	8.7
2005	13.2	10.5	6.8	—	—	—	11.3
2006	13.3	10.9	7.0	—	—	—	11.1
2007	13.5	11.3	7.3	2.5	—	11.5	10.6
2008	13.7	11.4	7.4	3.1	2.0	11.7	9.2
2009	14.0	11.8	13.7	3.2	2.6	12.0	8.8
2010	14.0	12.3	8.0	3.2	3.4	11.9	7.8

Hispanic	Composite	Cable Plus ADS	Cable Plus ADS w/Pay	DBS	DVR	DVD	VCR
2000	8.7	5.3	3.5	—	—	—	7.3
2005	10.9	7.6	4.5	—	—	—	8.6
2006	11.2	7.9	4.4	—	—	—	8.3
2007	11.6	8.8	4.8	2.9	—	9.5	8.0
2008	12.1	9.8	5.5	3.6	1.6	10.7	8.4
2009	12.7	10.3	5.6	4.1	2.4	11.0	7.8
2010	13.0	11.0	5.9	4.3	3.5	11.1	7.0

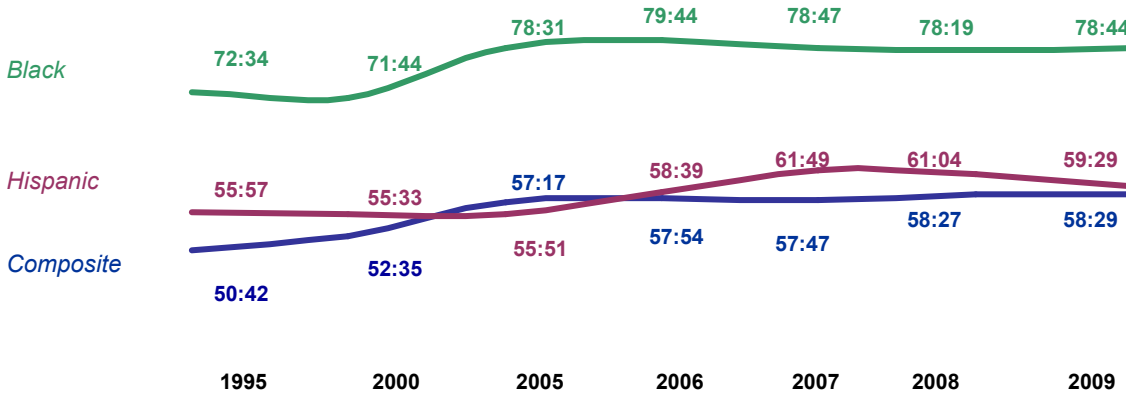
Asian	Composite	Cable Plus ADS	Cable Plus ADS w/Pay	DBS	DVR	DVD	VCR
2000	—	—	—	—	—	—	—
2005	—	—	—	—	—	—	—
2006	—	—	—	—	—	—	—
2007	4.4	3.5	1.6	0.7	—	4.0	3.7
2008	4.5	3.8	1.8	0.9	1.0	4.1	3.4
2009	4.7	4.1	1.9	1.1	1.2	4.2	3.2
2010	4.8	4.2	2.5	1.1	1.8	4.3	2.9

Television Audience 2009

Ethnic—Annual Household Trend

Tuning per TV Household per Week (Hours:Minutes)

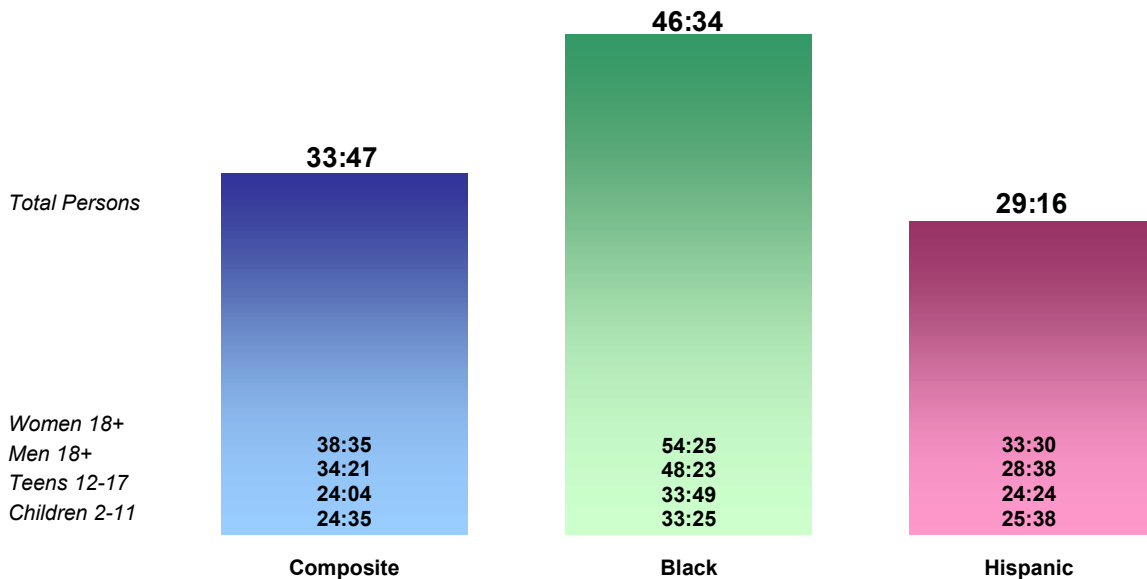
During the 2008-09 season, Black and Hispanic Households continue to have higher tuning levels than Composite.



Ethnic—Annual Persons Trend

Tuning per TV Household per Week (Hours:Minutes)

Persons in Black homes tune 46 hours and 34 minutes, compared to the Composite 33 hours and 47 minutes. Black viewing is higher than Composite among all reported age groups. Hispanic Persons 2+ viewing is lower than the Composite average (29:16 Hispanic vs. 33:47 Composite).



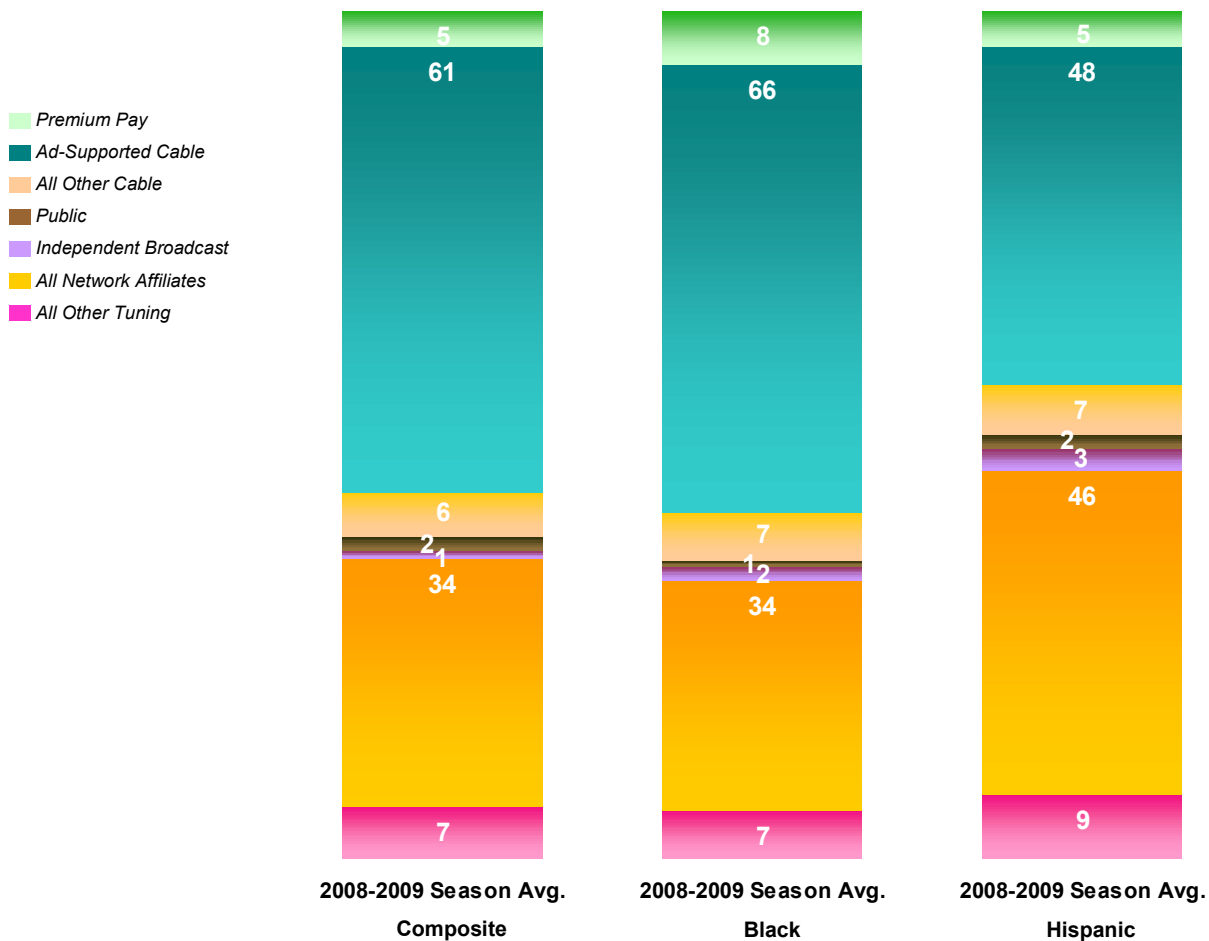
Note: Current data based on viewing from 9/22/08-9/20/09. Household data based on Total Day Live+7 HUT viewing. Persons data based on Live PUT viewing, plus DVR playback.
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Television Audience 2009

Ethnic—Share Trends of Viewing Sources Total Day, Mon.-Sun. 24 Hour Total

Share of TV Households

Based on the 2008-2009 season average, the largest share of viewing within Composite, Black and Hispanic households is attributed to Ad-Supported Cable. Composite and Black Household viewing to Network Affiliates comes in at 34%. Hispanic Households (Hispanic share is based on Total Sample) have a larger share (46%) attributed to the Network Affiliates, which includes Spanish Language Affiliates.



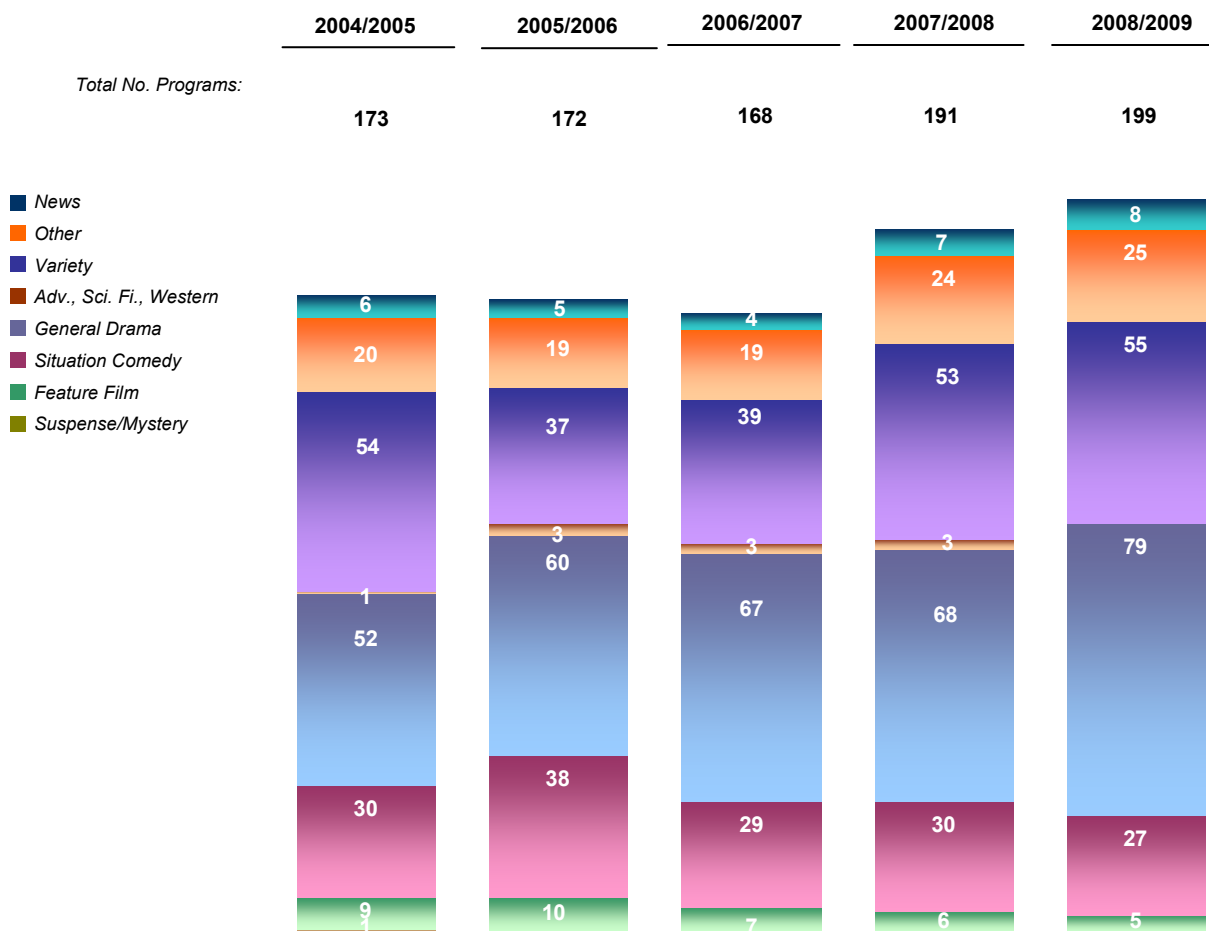
Television Audience 2009

Network Program Trends By Type Primetime

English Language Broadcast Networks
of Programs

Each year, The Nielsen Company examines the broadcast networks' schedules to profile the number of programs and types of programs in the schedule. The total number of programs has increased since last year.

General dramas continue to dominate the lineups, comprising 40% (79 of 199) of the programs.

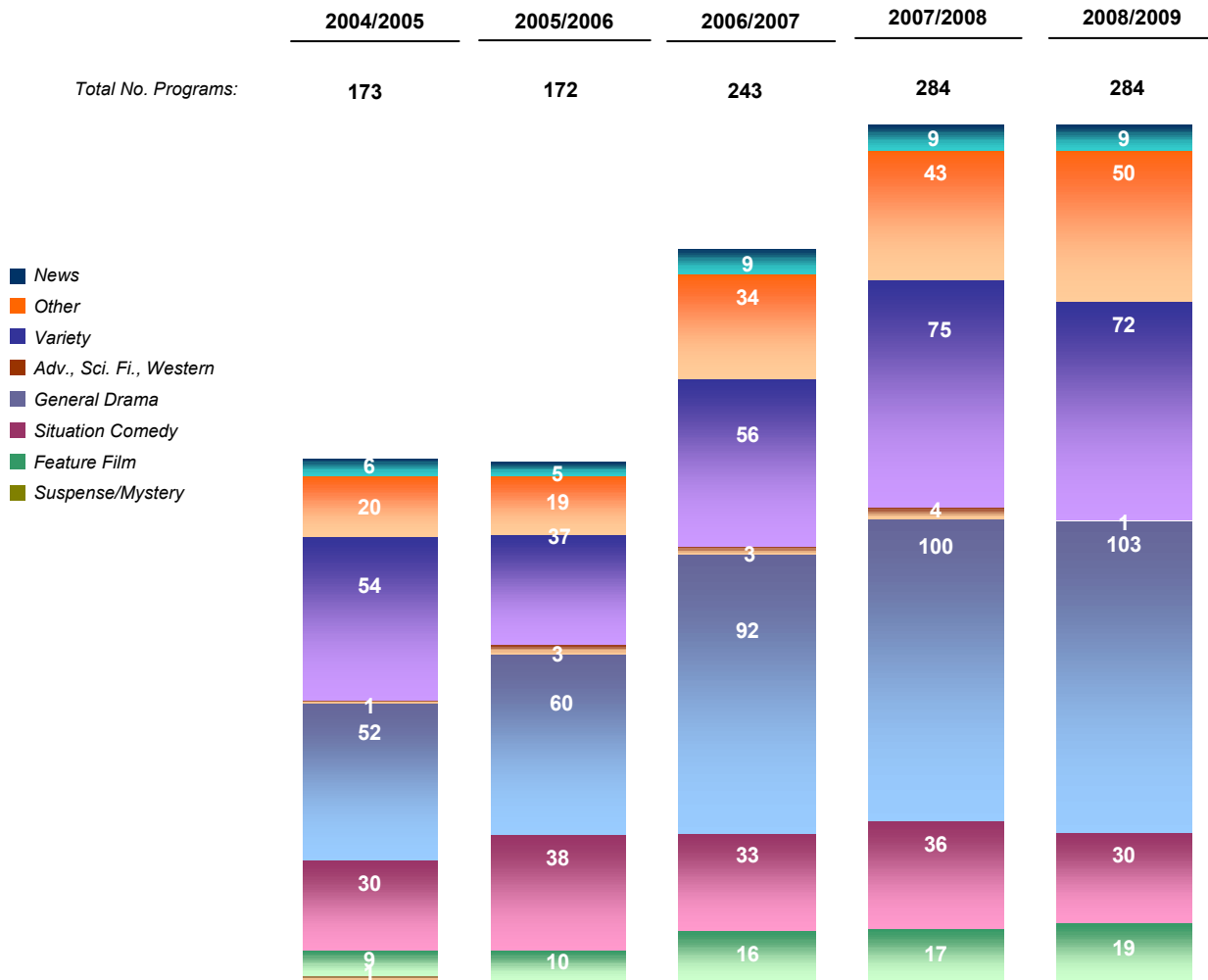


Television Audience 2009

Network Program Trends by Type Primetime

English & Spanish Language Broadcast Networks
of Programs

Beginning with the 2006/2007 broadcast season, Spanish Language Broadcast Networks are included in this report of Broadcast Network primetime schedules. In 2008-2009, while the percent across types of prime programs have shifted when including Spanish Language programming, the total remains the same from the previous year.



Television Audience 2009

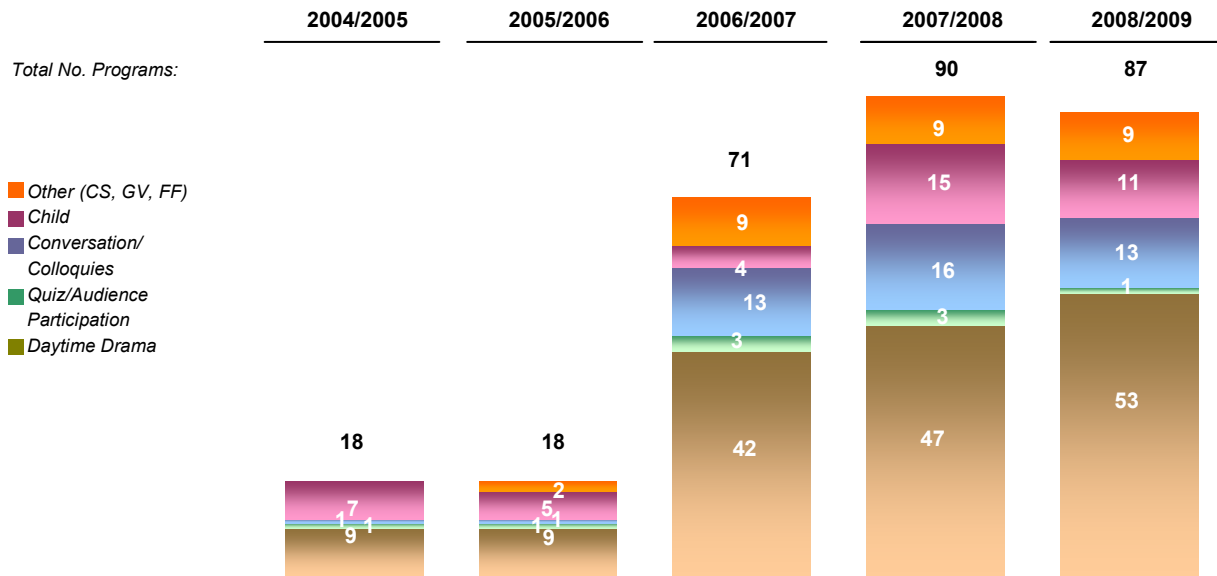
Network Program Trends by Type

English & Spanish Language Broadcast Networks

Monday-Friday Daytime

of Programs

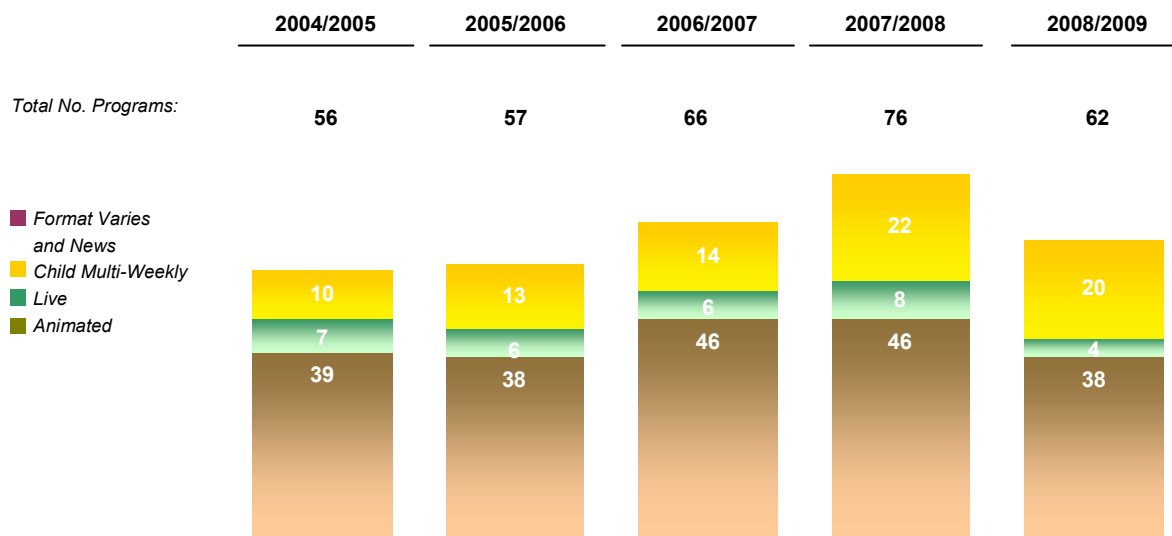
Daytime dramas remain the core of the broadcast networks' daytime schedules. The number of all Monday-Friday Daytime programs continues to increase with the inclusion of Spanish Language programming. All other categories decreased, with the exception of Other, which remained constant.



Weekend Children Daytime

of Programs

All children's broadcast number of programs in daytime categories have decreased since the previous year.

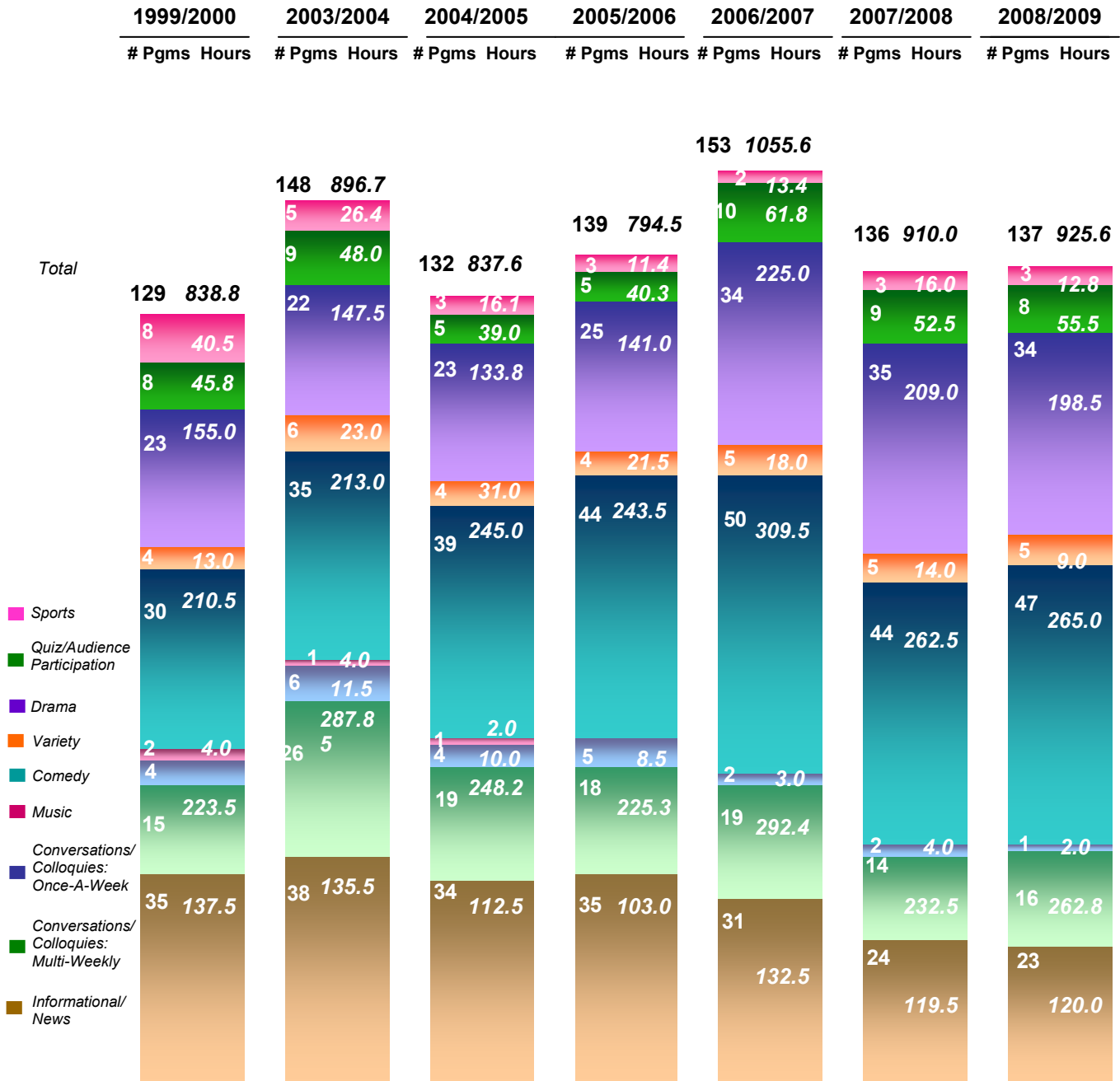


Television Audience 2009

Syndicated Programming by Type: Adults

of Programs: # of Hours

The total number of adult syndicated programs and hours have increased slightly in 2008-2009, from the previous year. Comedies and Multi-weekly Colloquies have increased in # of programs, while Quiz/Audience Participation, Comedies, Multi-Weekly Colloquies and Information News have increased in # of hours, from the previous year.



National Syndication Audience Demographic Report, September 2009

Television Audience 2009

Trends in Network Commercials English Language Broadcast Networks

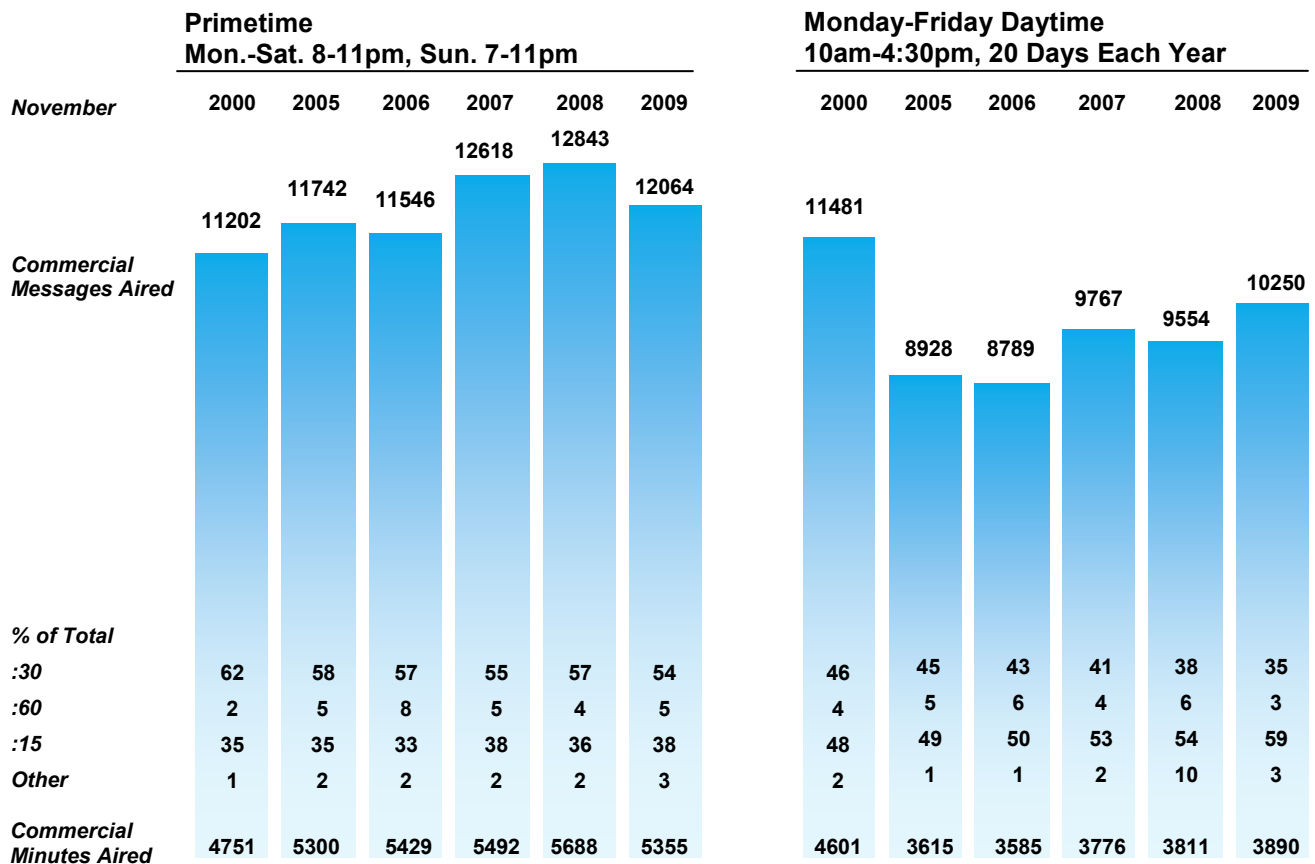
Share and Total Commercial Minutes Aired

The 30-second commercial remains the television advertising standard in primetime, accounting for 54% of all units. In primetime, the number of 30-second commercials has decreased 5%, but 15-second commercials has increased 6%. As the 30-second commercial decreases, an increase is seen in 60, 15 and other commercial durations.

In daytime, the 30-second commercial has decreased 8%, while the 60-second commercials have decreased by half, but 15-second commercials increased 9%.

In 2009, the number of commercials decreased 6% in primetime, but increased 7% in daytime. Total commercial minutes in primetime decreased, but increased in daytime.

(Note: Presidential election occurred in 2008).



Note: Current data is based on Nov 1, 2009 - Nov 30, 2009. Excludes promos and direct response.

Television Audience 2009

Trends in Network Commercials English Language Broadcast Networks Spanish Language Broadcast Networks

Share and Total Commercial Minutes Aired

With the addition of Spanish Language Broadcast Networks, the 30-second commercial is still the television advertising standard in primetime and has the same trend as English Language Broadcast Networks alone. In daytime there is a decrease in the percent of 30-second commercials when Spanish Broadcast Networks are added. There is an increase in 15-second commercials in daytime which is also has the same trend as English Language Broadcast Networks alone.

Overall, commercial messages aired and commercial minutes continue to increase across primetime and daytime with the addition of Spanish Language Broadcast Networks.

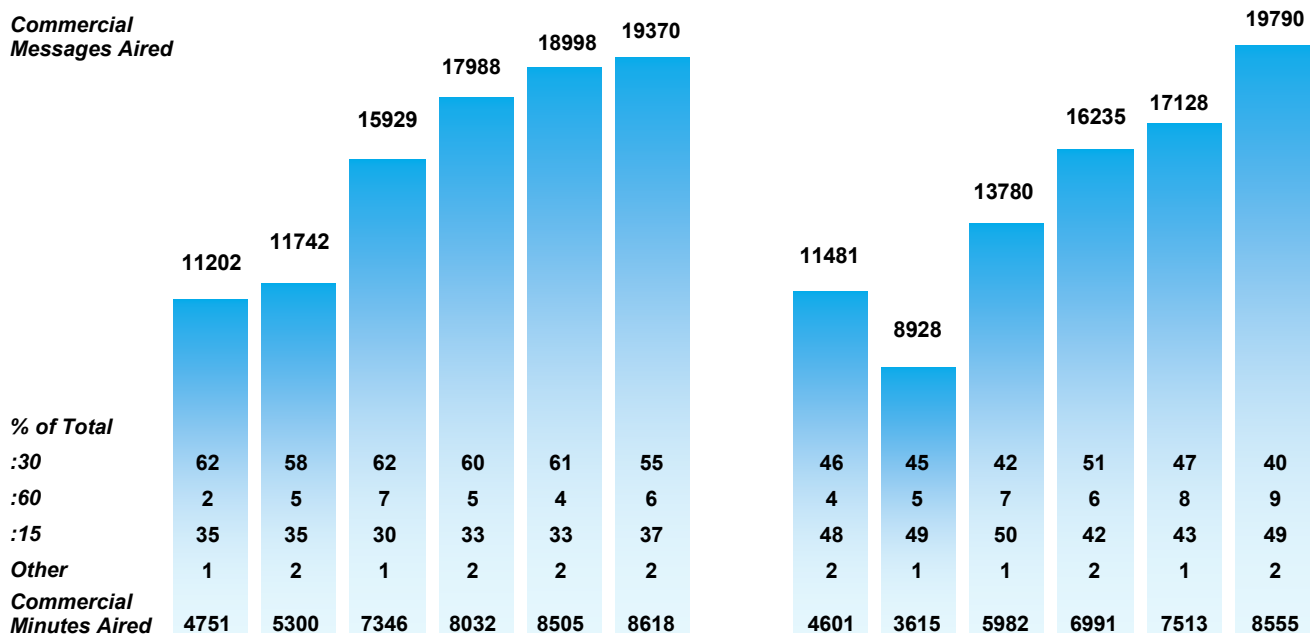
Primetime Mon.-Sat. 8-11pm, Sun. 7-11pm

2000 2005 2006 2007 2008 2009

Monday-Friday Daytime 10am-4:30pm, 20 Days Each Year

2000 2005 2006 2007 2008 2009

Commercial Messages Aired

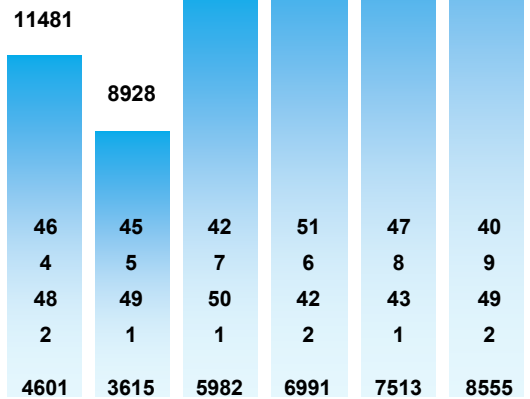


% of Total

	2000	2005	2006	2007	2008	2009
:30	62	58	62	60	61	55
:60	2	5	7	5	4	6
:15	35	35	30	33	33	37
Other	1	2	1	2	2	2

Commercial Minutes Aired

	2000	2005	2006	2007	2008	2009
Commercial Minutes Aired	4751	5300	7346	8032	8505	8618



Television Audience 2009

Trends of National TV Investments

Shares by Product Class

Data from Nielsen Monitor-Plus service illustrate the competitive positions of the national television medias in the multi-billion-dollar advertising industry. Syndication is not included in this examination due to methodology changes occurring in 2007.

Certain product categories are key to each national television medium. The Business and Finance category is the top category overall as it continues to lead all others in advertising spending across all medias.

Total advertising, National Cable and Spanish Language Cable increased in 2009 from 2008. Network television dollars have decreased.

Product Class	Composite			Network			Cable			Spanish Lang. Network			Spanish Lang. Cable		
	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009
Business & Finance	29	29	30	28	27	29	29	30	31	33	32	33	39	44	47
Drugs & Toiletries	18	17	16	19	18	17	16	16	16	13	12	11	8	10	11
Food & Beverage	10	11	11	10	10	10	11	11	11	12	13	15	12	11	11
Home & Building	7	7	7	6	6	5	9	8	8	9	9	9	11	7	6
Leisure	14	15	15	13	14	15	15	16	15	9	11	12	8	10	9
Retail & Merchants	10	10	10	10	8	10	8	8	9	12	13	13	10	9	9
Transportation	12	12	10	13	10	13	10	10	8	11	10	7	12	10	7
Other	1	1	1	1	1	1	1	1	1	LT	LT	LT	LT	LT	LT
Total Investment (Billions)	\$41.4	42.2	42.6	\$23.6	22.5	20.3	\$14.7	16.5	19.1	\$2.8	2.8	2.8	\$0.2	0.2	0.3

Note: Current data based on January 1, 2008 - December 31, 2008 AD*VIEWS 2008 data.

Television Audience 2009

Appendix

Growth of Television Ownership & Trends in Television Ownership (page 3-7)

Percent of Television Household statistics are based on The Nielsen Company Estimates. All universe estimates are based on prior July, projected to January, except where noted below.

Broadcast Only: Households that only have the capability to receive TV reception “over the air.” These households have neither Cable nor ADS.

Wired Cable: Households with one or more television sets that receive TV programming through a hard wired cable hook-up. Estimates for 1970-75, February-March.

Cable Plus ADS: Households with one or more television sets that receive TV programming through a hard wired cable hook-up or an Alternate Delivery system.

Cable Plus ADS with Pay: Homes with wired cable and/or homes with ADS plus any pay channels for which the service provider normally charges an extra premium.

Total ADS: Households that receive TV reception from an Alternate Delivery system. ADS Households that also have cable are included.

ADS is comprised of the following four types of systems:

- 1) DBS (Direct Broadcast Satellite): A satellite service whose signal is delivered directly to a viewer’s home via the use of the viewer’s own earth station dish. DBS is different from traditional satellite systems because subscribers use a smaller more versatile dish to receive programming at higher frequencies (KU-Band). DBS includes systems referred to as DSS.
- 2) Large Satellite Dish: Households receive their TV signal through a large satellite dish, usually 4 feet or more in diameter.
- 3) SMATV (Satellite Master Antenna Television): SMATV usually serves a housing complex or hotel. The TV signals are received via satellite and over the air broadcast stations and distributed to the units by coaxial cable.
- 4) MMDS (Multi-channel Multi-point Distribution Systems): Households use a specialized antenna and converter combination to receive TV signals. This technology is a carrier service for short distance line of sight transmission of TV programming to selected locations.

Digital Cable: Household with one or more television sets that receive TV programming through a digital cable set-top box.

DBS: Direct Broadcast Satellite is a service whose signal is delivered directly to a viewer’s home via the use of the viewer’s own earth station dish. DBS is different from traditional satellite systems because subscribers use a smaller more versatile dish to receive programming at higher frequencies (KU-Band). DBS includes systems referred to as DSS.

DVR: Households that have at least one television set with a DVR (Digital Video Recorder) attached. A DVR is a consumer device which records video programming from a television set.

HD Receiveable: A home that is equipped with an HD television and HD tuner and receives at least one HD network or station (based on estimates from November 2007).

HD Capable: A home that is equipped with an HD television and HD tuner capable of displaying HD content (based on estimates from November 2007).

HD Display Capable: A home that is equipped with an HD television that is capable of displaying HD content (based on estimates from February 2008).

Multi-Set: Households with two or more operable television sets.

DVD: Households that have at least one TV set with a DVD player attached.

Video Games: Includes homes that have at least one TV set with a videogame console attached. Online and handheld videogames are not included.

VCR: Households that have at least one television set with a VCR attached. Prior to 2002, based on prior May.

Remote Control: Discontinued to be reported as of 2008 estimates; see previous TVA for historical statistics.

Color Television: Discontinued to be reported as of 2008 estimates; see previous TVA for historical statistics.

Population and Projections of Population Growth to 2050 (pages 8,-11)

Based on Nielsen Media Research Estimates January 1 of each year. Projections are based on assumptions about demographic trends that may turn out to be incorrect. Each year the set of projections will differ from both advance and final estimates for future years.

Household Tuning and Persons Viewing (pages 12,13)

Data prior to 1990 based on NTI Audimeter sample. Post 1990 data based on National People Meter sample.

Prior to 1990, includes 48 weeks per year. 1990—present, includes 52 weeks.

1984—85 data based on an average of November, February, May and July.

1989—90 data based on September—August.

1994—present data based on broadcast seasons—mid-September to mid-September each year.

The 2006 data includes the following data streams: Live (9/19/05-12/25/05) and Live +7 (12/26/05—9/17/06).

The 2007 data is based on Live +7 (9/18/06—9/23/07).

The 2008 data is based on 9/24/07-9/21/08. Household data based on Total Day Live+7 HUT viewing. Persons data based on Live PUT viewing, plus DVR playback.

The 2009 data is based on 9/22/08-9/20/09. Household data based on Total Day Live+7 HUT viewing. Persons data based on Live PUT viewing, plus DVR playback.

Television Audience 2009

Distribution by Dayparts (page 12 bottom)

1975, 12 months ending in March

1980-1995, 12 months ending in August each year

1995-present based on broadcast seasons—mid-September to mid-September each year

Monday-Friday Daytime: 10am-4:30pm

Early Fringe: Monday-Friday 4:30-7:30pm

Primetime: Monday-Saturday 8-11pm, Sunday 7-11pm

Late Fringe: Monday-Sunday 11pm-1am

Saturday-Sunday Day: Saturday 7am-7:30pm, Sunday 7am-7pm

Other: Includes Monday-Friday 1-10am, Saturday-Sunday 1-7am, Monday-Saturday 7:30-8pm

Other separated as: *Overnight (Mon-Fri 1-6am), **Early Morning (Mon-Fri 6-10am), ***Remainder (Sat-Sun 1-7am, M-Sat 7:30-8pm)

The 2006 data includes the following data streams: Live (9/19/05-12/25/05) and Live +7 (12/26/05—9/17/06).

The 2007 data is based on Live +7 (9/18/06—9/23/07).

The 2008 data is based on 9/24/07-9/21/08. Household data based on Total Day Live+7 HUT viewing.

The 2009 data is based on 9/22/08-9/20/09. Household data based on Total Day Live+7 HUT viewing.

Share Trends of Viewing Sources (page 14)

Prior to 2006 TVA, data source was NTI Total Viewing Sources Report—Sum of Sources based on an average of November, February, May and July each year.

2005—2006 season includes a combination of Live and Live +7 data

2006—2007 season includes Live +7 data only

2007-2008 season includes Live+7 data only

2008-2009 season includes Live+7 data only

Network Affiliates:

1984-1990: ABC, CBS, NBC affiliates

1991-1999: ABC, CBS, NBC, FOX affiliates

1999-December 25, 2005: ABC, CBS, NBC, FOX, WB, UPN, PAX affiliates

December 26, 2005-January 29, 2006: ABC, CBS, NBC, FOX, WB, UPN, UNI, PAX affiliates

January 30, 2006-February 26, 2006: ABC, CBS, NBC, FOX, WB, UPN, UNI, TEL, PAX affiliates

February 27, 2006-August 27, 2006: ABC, CBS, NBC, FOX, WB, UPN, UNI, TEL, TF, PAX affiliates

August 28, 2006-September 3, 2006: ABC, CBS, NBC, FOX, WB, UPN, UNI, TEL, TF, AZA, PAX affiliates

September 4, 2006-Present: ABC, CBS, NBC, FOX, CW, WB, UPN, UNI, TEL, TF, AZA, PAX, MNT affiliates (excluded as of 9/28/09)

Independents:

1984-1991: Commercial Independent stations including FOX affiliates and TBS

1991-1999: Commercial Independent stations including WB, UPN affiliates and super stations excluding TBS

1999-2006: Commercial Independent stations including Hispanic Broadcast network affiliates excluding TBS

2006-present: Commercial Independent stations excluding Hispanic Broadcast network affiliates as they become measured in the NPM sample excluding TBS

Note: As Hispanic networks started to be measured in the NPM sample, they were removed from Independent and placed in Network Affiliates as stated in the Broadcast section above. Summary of broadcast Hispanic networks are as follows:

Univision measurement began on 12/26/2005, Telemundo measurement began on 1/30/2006, Telefutura measurement began on

2/27/2006, Azteca measurement began on 8/28/2006

Public: PBS affiliates

Ad Supported Cable: 1999-present: Viewing to advertiser supported cable networks including TBS and WGN cable

All Other Cable: 1999-present: Tuning to cable networks that are neither ad supported nor premium pay, includes pay-per-view, interactive channels, home shopping channels, and audio only feeds.

Premium Pay Cable: 1999-present: Viewing to premium pay cable services

Pay Cable: 1984-1999: Cable subscribers receiving at least one premium channel. This does not include Pay-Per-View

Basic Cable: 1984-1991: Tuning to basic cable including Pay-Per-View

1991-1999: Tuning to basic cable including TBS and Pay-Per-View

Effective 1991, FOX and TBS changed from Independents to Network Affiliates and Basic Cable Respectively

Source: Nielsen Media Research Cable Status Reports 1984-1991: Nielsen Media Research Galaxy Explorer 1991-present

Ethnic Trends of TV Population Growth (page 15)

Data based on Nielsen Media Research Estimates January 1 of each year.

Black is defined as "Black or African American alone or in combination with any other race."

Asian is defined as "alone or in any combination with any other race."

Ethnic Trends in Ethnic Penetration and TV Ownership (pages 16,17)

Composite and Black TV Household data based on Nielsen Media Research Estimates from National People Meter Sample.

Hispanic Household data based on Nielsen Media Research Estimates from NHTI People Meter Sample.

Asian Household data effective with 2007 data.

Television Audience 2009

Ethnic Household Tuning and Persons Viewing Trends (page 18)

Composite and Black data based on National People Meter Sample.
Hispanic data based on NHTI People Meter Sample
Mid-September to mid-September averages
2006 data is based on Live (9/19/05—12/25/05) and Live +7 (12/26/05-9/17/06)
2007 data is based on Live +7 (9/18/06—9/23/07)
2008 data is based on Live +7 (9/24/07—9/21/08)
2009 data is based on Live+7 (9/22/08-9/20/09).

Ethnic Share Trends of Viewing Sources (page 19)

Prior to the 2006-2007 broadcast season, the share trends of ethnic viewing were based on averages of November, February, May and July data from the following sources:
Composite: Nielsen Television Activity Report (NTAR)
Hispanic: NHTI Monthly Hispanic Reports
Black : Custom NTAR Reports
Effective with 2006-2007 and forward, data is based on Live +7. Hispanic data is Head of Household based on the Total Sample.

Network Program Trends by Type in Primetime and Daytime (pages 20, 21, 22)

Data is based on mid-September to mid-September program line-ups of regularly scheduled programs.
Primetime data includes English Language only and Spanish Language and English Language network programs for the 2006-2007 broadcast season.
Monday—Friday Daytime and Weekend Children Daytime program line ups include English Language only (prior to 2006-2007) and a combination of English Language and Spanish Language network programs.

Syndicated Programming by Type (page 23)

NSS National Audience Demographics Report, September each year

Network Commercial Trends (pages 24, 25)

Data is based on Nielsen Monitor-Plus data.
Regional commercials, promotions and direct response are excluded.
Measurement interval is November 1—30 every year.
FOX included as of 1995
FOX, WB, UPN and PAX included as of 2000; no UPN for Daytime
FOX, CW, MNT, PAX, AZA, TEL, TF and UNI are included as of 2006 data
PAX becomes ION and MT3 included as of 2007
Daytime data in years 1990 and 1995 include LT. LT = less than 1% of Total

Trends of National Television Investments (page 26)

Data is based on Nielsen Monitor-Plus data.
Measurement interval is January-December every year.
Data excludes Promotion and Direct Response advertising.
Shares may not add back to 100, due to rounding.
Spanish Language Networks included effective with 2006 reported data.
Syndication data excluded effective with 2006 reporting due to methodology changes.