

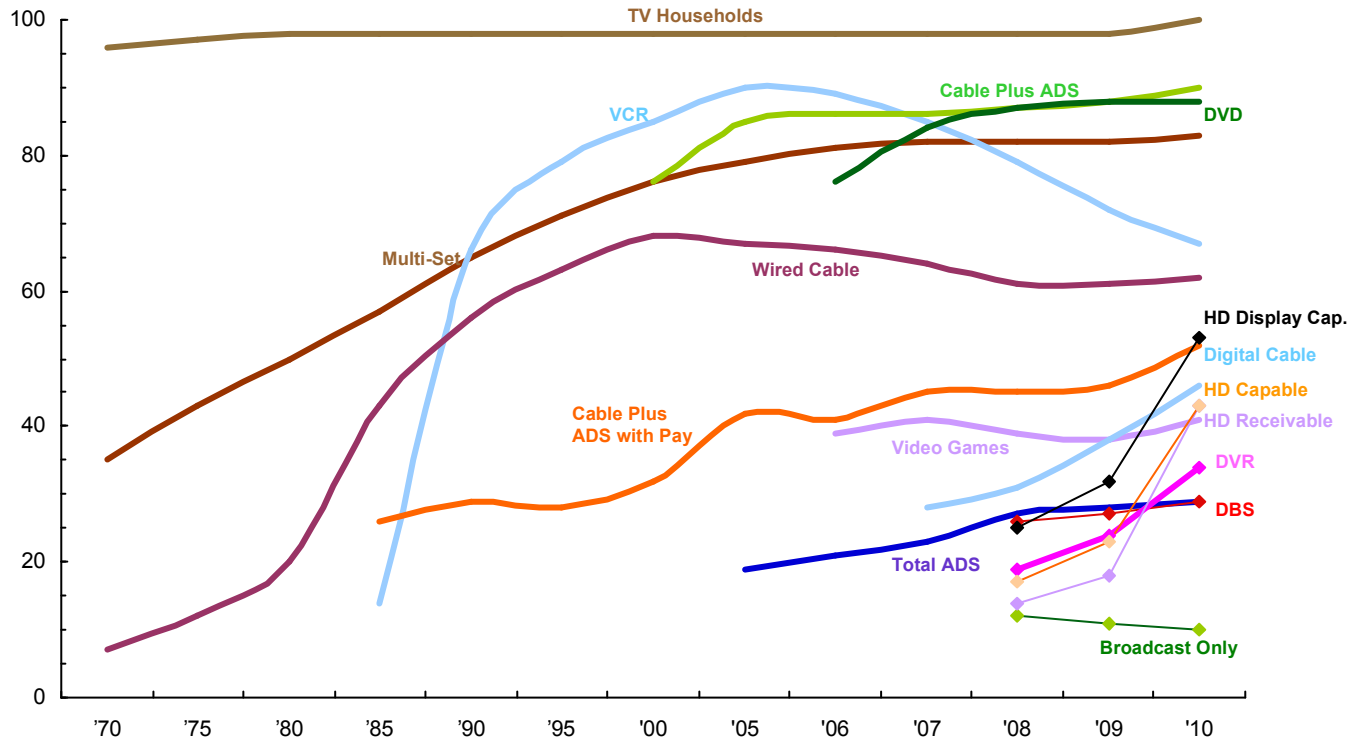
# Television Audience 2009

## 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.



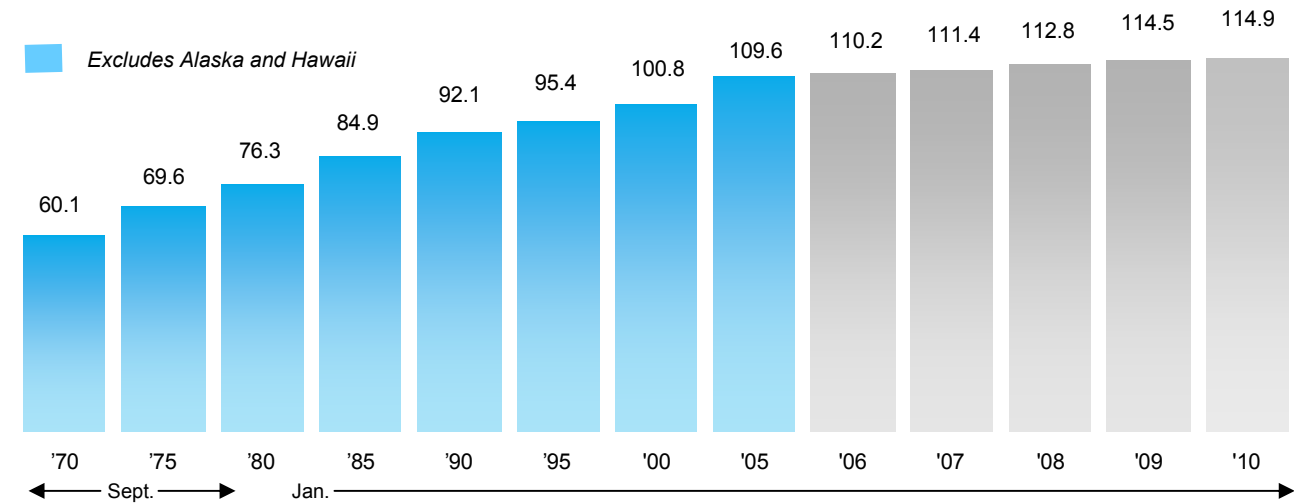
Key:	'70	'75	'80	'85	'90	'95	'00	'05	'06	'07	'08	'09	'10
<b>% of TV Households</b>	96	97	98	98	98	98	98	98	98	98	98	98	98
Broadcast Only	—	—	—	—	—	—	—	—	—	—	12	11	9
Wired Cable	7	12	20	43	56	63	68	67	66	64	61	61	62
Cable Plus ADS	—	—	—	—	—	—	76	85	86	86	87	88	90
Cable Plus ADS w/Pay	—	—	—	26	29	28	32	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

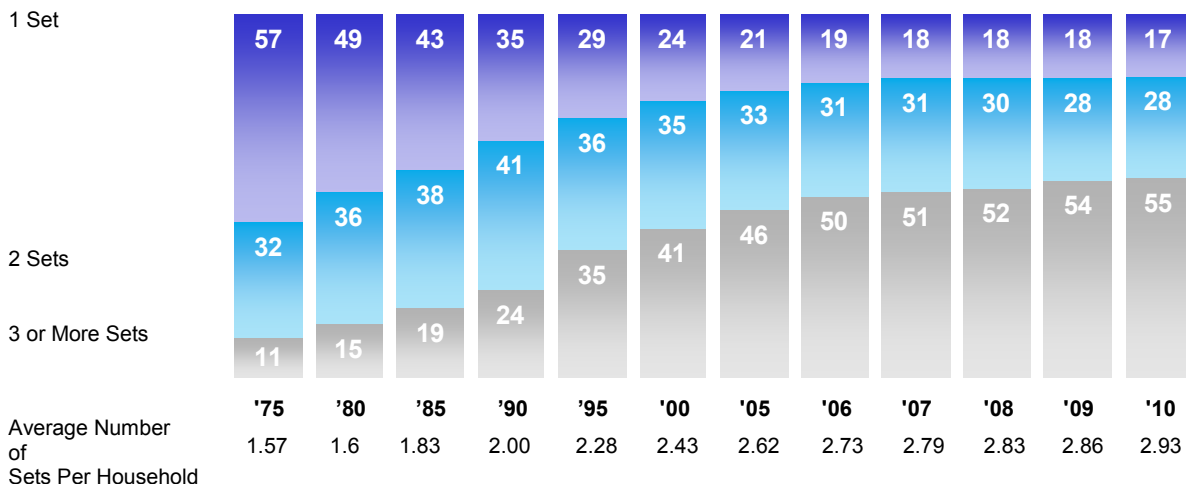


	'70	'75	'80	'85	'90	'95	'00	'05	'06	'07	'08	'09	'10
Wired Cable	3.9	8.6	15.2	36.3	51.9	60.5	68.6	73.9	73.2	71.4	69.3	70.2	71.2
Cable Plus ADS	—	—	—	—	—	—	—	—	94.8	96.2	98.5	100.9	103.8
Cable Plus ADS w/Pay	—	—	—	21.8	27.1	27.1	31.8	46.3	45.6	49.7	51.2	52.9	59.2
Total ADS	—	—	—	—	—	—	—	20.8	22.7	25.8	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

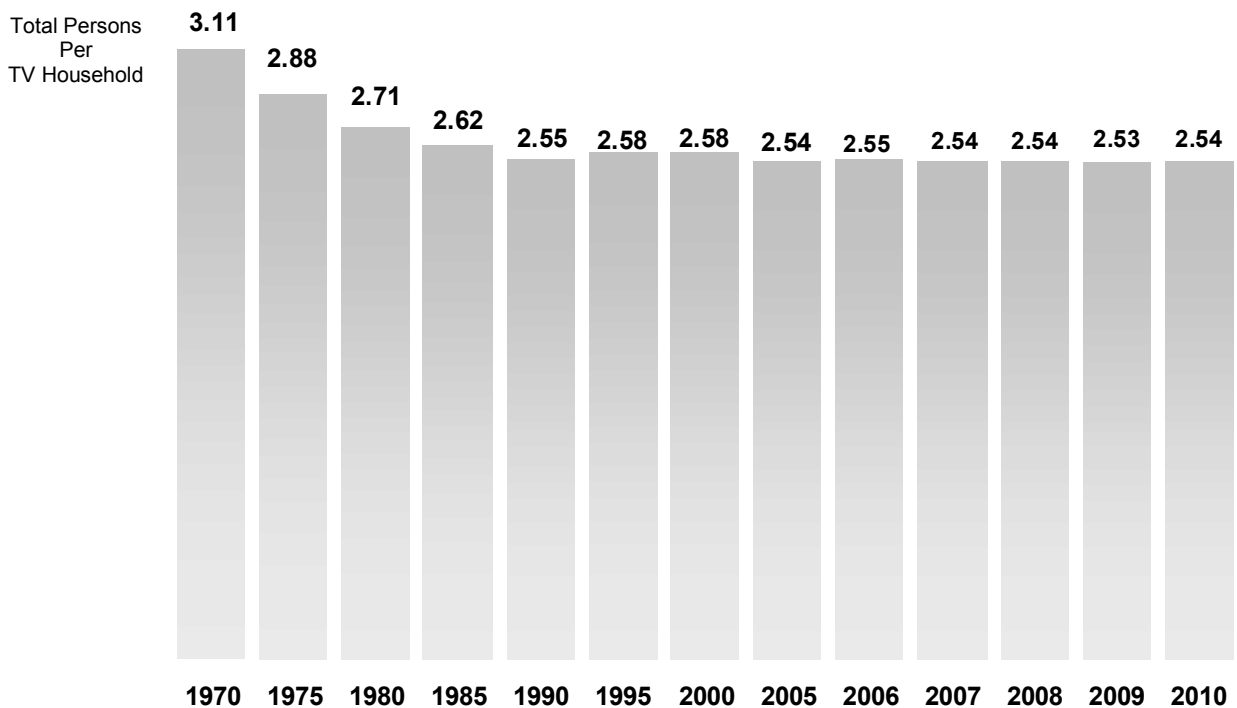
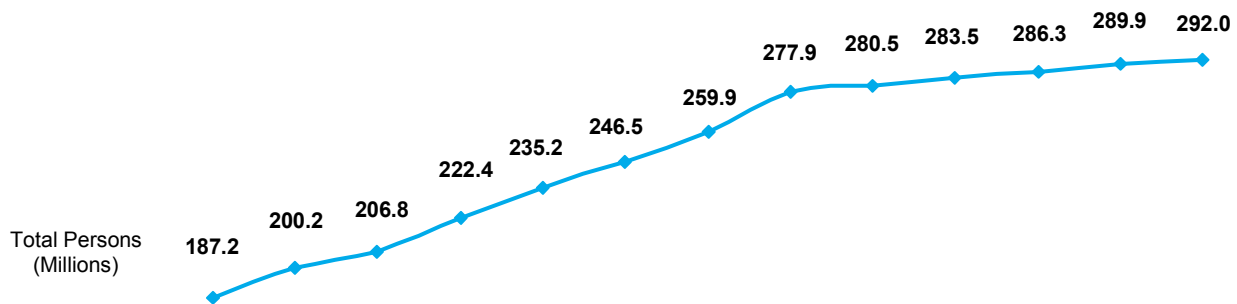


# Television Audience 2009

## 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.



# Television Audience 2009

## Share Trends of Viewing Sources Total Day, Primetime, Daytime, Late Night

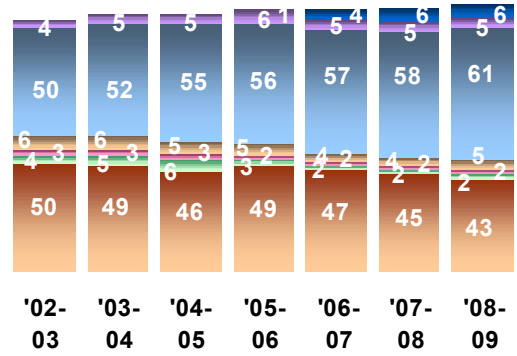
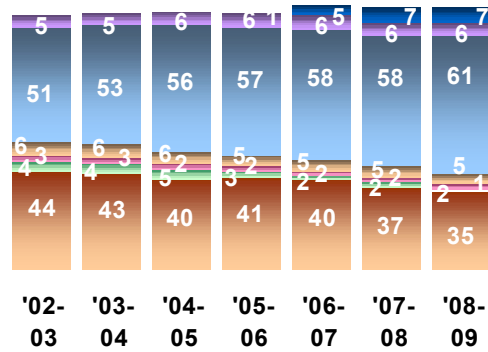
Share of Total US TV Households

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

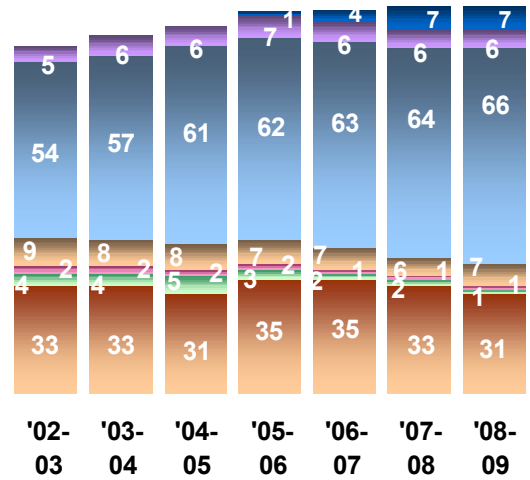
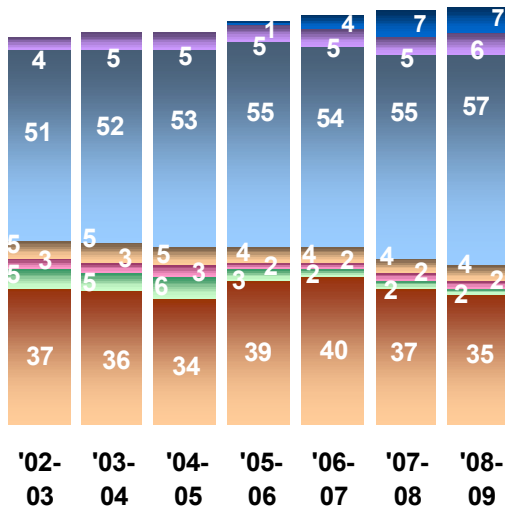
- All Other Tuning
- All Other Cable
- Ad Supported Cable
- Premium Pay
- Public
- Independent
- Network Affiliates



**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—Trends in Television Ownership

TV Households in Millions

<b>Composite</b>	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

<b>Black or</b>	Composite	Cable Plus ADS	Cable Plus	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

<b>Hispanic</b>	Composite	Cable Plus ADS	Cable Plus	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

<b>Asian</b>	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

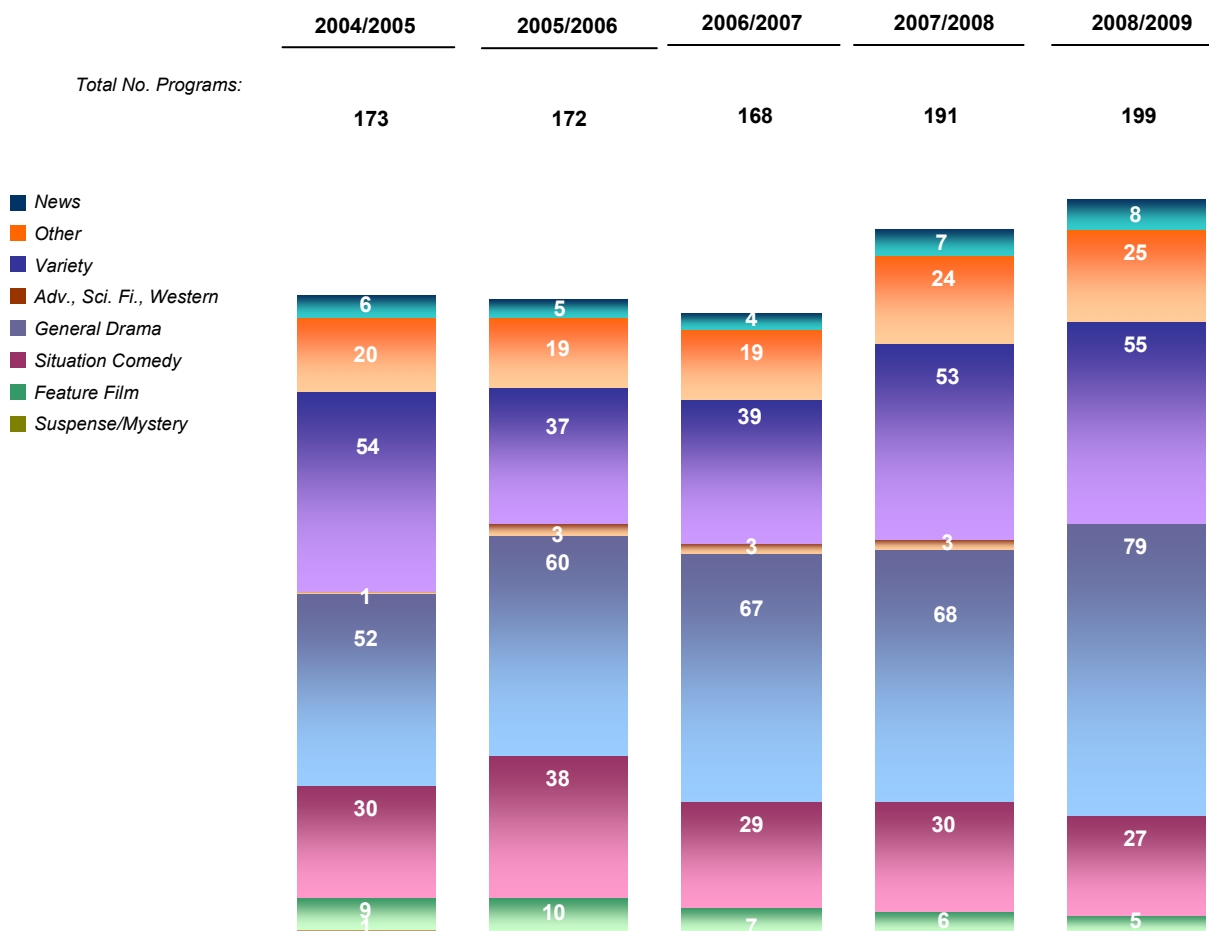
# Television Audience 2009

## 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

## 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
<b>Total Investment (Billions)</b>	<b>\$41.4</b>	<b>42.2</b>	<b>42.6</b>	<b>\$23.6</b>	<b>22.5</b>	<b>20.3</b>	<b>\$14.7</b>	<b>16.5</b>	<b>19.1</b>	<b>\$2.8</b>	<b>2.8</b>	<b>2.8</b>	<b>\$0.2</b>	<b>0.2</b>	<b>0.3</b>

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