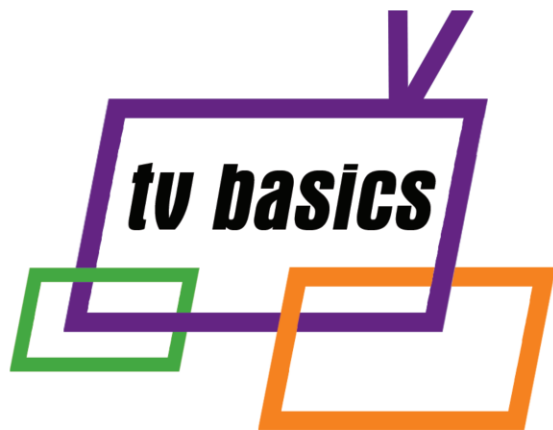


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Introduction

TV Basics has long been one of TVB's most popular publications. Here you will find information and statistics that will help you understand and navigate the increasingly complex multiplatform world in which we all operate. Local broadcast television stations have expanded their abilities to serve local marketplaces in a variety of ways that extend beyond their traditional on-air fare. They now provide digital subchannels, hyperlocal websites, local HD programming and mobile DTV to connect with viewers and to offer advertisers the synergy of local multiplatform advertising that reaches consumers at home, at work and on the go.

TV has come a long way since the 3-channel days of the 1950s — and the complexity of the industry continues to increase. Now an informed observer of television must understand the impact of digital video recorders (DVRs), alternate-delivery systems (ADS), and cable vs. broadcast comes. *TV Basics* can help.

Since the blizzard of statistics generated by the industry keeps coming, we now keep a cyber-edition of *TV Basics* on the TVB website updated regularly and ready to download whenever you need it.

We suggest you bookmark www.tvb.org for quick access to the most current data available. Don't see what you're looking for? Call us at 212-486-1111 or e-mail info@tvb.org... chances are, we can help!

TVB is the not-for-profit trade association of America's broadcast television industry. TVB provides a great variety of tools and resources to help advertisers make the most effective and efficient use of local and national spot television.

Notes

Many tables in this booklet span 50 years. During that time many data suppliers have been bought, sold or merged. Also, many research techniques, gathering methods and time frames have changed. The "Sources" given here refer, in general, to the current source. If further clarification is needed for specific tables, please contact TVB's Research Department.

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TV Households

In 1950, television penetration of U.S. households was only 9.0%. Within only five years it was up to 64.5%. By 1965 it reached 92.6%, and from there it has grown to its current 97.1% level.

Year	Total U.S. HH (000)	TV HH (000)	% HH With TV
1950	43,000	3,880	9.0
1955	47,620	30,700	64.5
1960	52,500	45,750	87.1
1965	56,900	52,700	92.6
1970	61,410	58,500	95.3
1975	70,520	68,500	97.1
1980	77,900	76,300	97.9
1985	86,530	84,900	98.1
1990	93,760	92,100	98.2
1995	97,060	95,400	98.3
2000	102,680	100,800	98.2
2001	104,080	102,200	98.2
2002	107,400	105,500	98.2
2003	108,620	106,700	98.2
2004	110,420	108,400	98.2
2005	111,630	109,600	98.2
2006	112,260	110,200	98.2
2007	113,410	111,400	98.2
2008	114,890	112,800	98.2
2009	115,760	114,500	98.9
2010	116,170	114,900	98.9
2011	117,220	115,900	98.9
2012	118,590	114,700	97.1

Source: The Nielsen Company-NTI, Sept. each year.

Note: 2009 growth is partially due to Nielsen's update of the national TV penetration estimates for HH by Race & Ethnicity.

Multi-Set & VCR Households

TV households with two or more sets accounted for only 1% of the total in 1950. It grew to 50.1% by 1980, and now accounts for 84.4%. VCR penetration grew from 1.1% in 1980 to 68.6% within 10 years. Penetration began to drop off after peaking at 91.5% in 2003.

Year	Multi-Set (000)	% TVHH	VCR (000)	% TVHH
1950	40	1.0	—	—
1955	875	2.9	—	—
1960	5,500	12.0	—	—
1965	10,225	19.4	—	—
1970	18,840	32.2	—	—
1975	28,360	41.4	—	—
1980	38,260	50.1	840	1.1
1985	48,220	56.8	17,740	20.9
1990	60,140	65.3	63,180	68.6
1995	67,639	70.9	77,270	81.0
2000	76,200	75.6	85,810	85.1
2001	76,750	75.1	88,120	86.2
2002	78,400	74.3	96,190	91.2
2003	80,290	75.2	97,630	91.5
2004	82,830	76.4	98,400	90.8
2005	86,620	79.0	98,860	90.2
2006	89,470	81.1	97,690	88.6
2007	91,900	82.5	95,210	85.5
2008	93,010	82.5	88,760	78.7
2009	94,040	82.1	82,550	72.1
2010	95,290	82.9	76,590	66.7
2011	97,050	83.7	71,690	61.9
2012	96,750	84.4	67,150	58.5

Source: The Nielsen Company-NTI, Jan. each year

Home Technology Cross Ownership

Households that own one technology are more likely than Total U.S. households to own other tech devices. Cell phones, personal computers and DVD players have reached over 80% penetration for Total U.S. households.

Home Access To:								
Among Homes With:	% Cell Phone	% DVD Player	% Internet at Home	% Personal Computer	% Satellite Dish	% Video Game System	% VCR	% MP3 Player
Total U.S.	87.3	86.7	77.1	80.9	26.3	35.0	69.6	45.3
Cell Phone	—	90.8	83.8	87.3	26.7	38.4	72.1	49.8
DVD Player	91.5	—	82.8	86.0	27.5	38.7	74.6	49.7
Internet at Home	94.9	93.1	—	98.3	27.2	42.2	72.7	56.1
Personal Computer	94.2	92.1	93.6	—	27.9	40.6	72.2	54.1
Satellite Dish	88.8	90.7	79.9	85.9	—	38.8	75.9	45.7
Video Game System	95.9	95.7	93.0	93.9	29.1	—	69.3	76.8

Source: The Nielsen Company 3Q 2011 Home Technology Report

Internet Stats

Internet Usage & Access

81.7 million HHs with Internet access by the end of 2009.
100.2 million HHs will have Internet access by 2016.

Source: MAGNA Global's On Demand Quarterly April 2010

64.8% of people of any age use the Internet at least once per month in the U.S.

Source: eMarketer 12/30/09

Blog Usage

About 28 million U.S. Internet users wrote a blog in 2009, and by 2013, 37.6 million users will update their blogs at least monthly.

Source: eMarketer 11/6/09

Broadband Penetration

74.9 million HHs estimated with broadband by end of 2009.
Broadband access will grow to 99.2 million HHs by end of 2016.

Source: MAGNA Global's On Demand Quarterly April 2010

Click Rates

E-mail click rates climbed to 6.2% in 3Q09 according to an Epsilon study on North American E-mail Trends and Benchmarks.

Source: Media Post's Center for Media Research 1/10/10

Internet Protocol TV (IPTV) Subscribers

U.S. IPTV market will grow from over 5 million subscribers in 2009, to 15.5 million or 13% of total television households by 2013.

Source: Strategy Analytics report 9/1/09 cited in tvover.net

Podcast Usage

43% of Americans are aware of Podcasting and 22% have listened to a Podcast in 2009. 11% have listened to a podcast in the last month, equaling 27 million listeners age 12 and older.

Source: Arbitron/Edison Media Research 2009

Social Networking Sites Usage

Penetration climbed to 86% of Internet users in 2009, and 9% of users always look at ads on social networking sites.

Source: SheSpeaks Study cited in eMarketer 1/4/10

28% of U.S. shoppers say social media has influenced their purchases this year.

Source: comScore data cited in MediaBuyerPlanner.com 12/9/09

Online Video Usage & Penetration

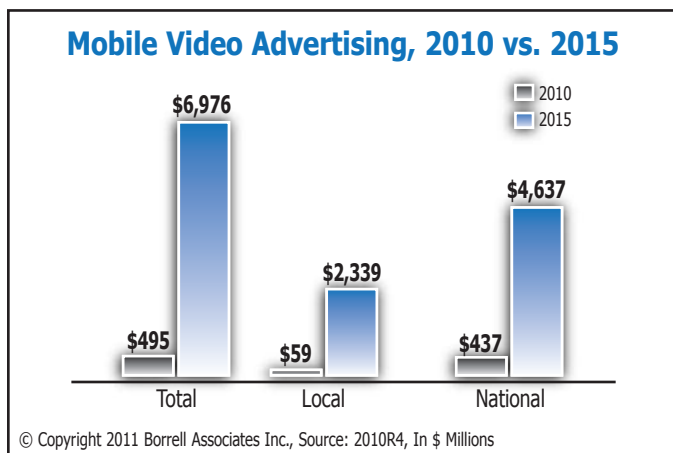
47.3 million VOD HHs with true VOD (not including simulated VOD from DirectTV and EchoStar) at the end of 4Q09.

Source: MAGNA Global's On Demand Quarterly April 2010

Online video viewers are watching videos longer, with the average length-watched per session increasing by 9.46% per month over the past 6 months to nearly 6 minutes, according to a new report from TubeMogul and Brightcove.

Source: Cynopsis Digital 5/7/10

Mobile Stats



The number of U.S. mobile subscribers watching video on their mobile devices rose more than 40 percent year-over-year.

The growing popularity of mobile video is due, in part, to the rapid adoption of media-friendly mobile devices, including smartphones. Whereas in Q4 2009 only 23 percent of U.S. mobile subscribers had smartphones, by the end of 2010 smartphones penetration had reached 31 percent.

Mobile Subscribers Watching Video on a Mobile Phone:

Users 13+	Q2 2011	Q1 2011	Q2 2010
Overall Usage – Number (in 000's)	29,916	28,538	21,957
Monthly Time Spent in Hours: Minutes	4:20	4:20	3:37

Monthly Time Spent in Hours:Minutes						
	T13-17	A18-24	A25-34	A35-49	A50-64	A65+
Q4 2010	7:13	6:30	4:20	3:37	2:53	1:50
Q1 2011	8:40	5:47	3:37	3:28	2:53	2:10
Q2 2011	7:13	5:25	3:54	2:53	2:10	1:27

Video Audience Composition On Mobile Phones						
	T13-17	A18-24	A25-34	A35-49	A50-64	A65+
Q4 2010	11%	17%	32%	27%	10%	2%
Q1 2011	12%	20%	30%	26%	10%	2%
Q2 2011	13%	23%	28%	25%	9%	2%

Source: The Nielsen Company

High Definition TV (HDTV) HD Status

While 75.5% of television households have HD capable sets, 72.9% are receiving HD programming.

Total U.S.	HD Receivable ¹	HD Capable ²	HD Display Capable ³
Nov-07	11.3	13.7	NA
Feb-08	13.6	17.0	25.1
May-08	15.9	20.3	29.0
Jul-08	18.1	22.9	31.9
Sep-08	18.1	22.9	31.9
Nov-08	20.7	26.4	35.4
Feb-09	25.3	30.6	39.4
May-09	31.0	34.6	42.8
Jul-09	33.9	37.2	45.0
Sep-09	36.5	39.2	46.8
Nov-09	38.3	41.3	48.5
Feb-10	43.2	46.3	53.0
May-10	47.3	50.5	56.6
Jul-10	52.3	52.5	58.2
Sep-10	53.9	54.0	59.3
Nov-10	55.9	56.0	60.9
Feb-11	59.4	59.5	63.6
May-11	63.3	63.5	67.1
Jul-11	65.1	65.3	68.6
Sep-11	65.1	65.3	68.6
Nov-11	66.7	66.8	69.8
Feb-12	69.6	69.7	72.4
May-12	72.9	73.0	75.5

(1) HD Receivable: A home that is equipped with an HD television and HD Tuner and receives at least one HD network or station.

(2) HD Capable: A home that is equipped with an HD television and HD Tuner capable of receiving signals in HD.

(3) HD Display Capable: A home that is equipped with an HD television that is capable of displaying HD content.

Source: The Nielsen Company, Media-Related Universe Estimates.

Digital Video Recorders (DVRs)

Nielsen estimates the national DVR penetration currently at 43.0%.

National DVR Universe Estimates (%)	
May-07	17.2
Jul-07	18.7
Sep-07	18.6
Nov-07	19.7
Feb-08	21.4
May-08	23.0
Jul-08	24.4
Sep-08	24.4
Nov-08	26.9
Feb-09	28.9
May-09	30.0
Jul-09	30.8
Sep-09	31.5
Nov-09	32.3
Feb-10	34.2
May-10	35.4
Jul-10	35.9
Sep-10	36.7
Nov-10	37.2
Feb-11	38.0
May-11	39.6
Jul-11	40.4
Sep-11	40.4
Nov-11	41.3
Feb-12	42.1
May-12	43.0

Source: The Nielsen Company, Media-Related Universe Estimates

Room Locations of TV Sets

The average American home is now equipped with a record number of television sets. The popularity of the flat screen has made it even easier to put televisions in non-traditional places. For the advertiser, this means an even greater opportunity to target the right audience at the right time.

The table below shows that 75% of TV households have a set in the living room, while 27% of the sets in homes are in the living room.

	% TVHH with sets in the...	% of total household TV sets
Living/front/sitting room, parlor	75	27
Family/rec./play room, den	29	11
Study, library, office computer room	9	3
Master bedroom	64	24
Child's bedroom	19	9
Other bedroom	23	10
Kitchen	12	4
Dining room	2	1
Basement	9	4
Garage, porch, workshop, attic	4	1
Other room/in storage	6	6

Source: GfK-Knowledge Networks, *The Home Technology Monitor™*
2011 Ownership and Trend Report
(Excludes Alaska and Hawaii)

Time Spent Viewing: Households

The time Americans spend viewing television has been growing steadily since the medium first emerged nearly 60 years ago. This growth was fueled by a variety of factors over the decades: multi-set and color TV households increased, the selection of 24-hour programming options expanded, and such technologies as the VCR and DVR gave viewers ever increasing control. By 2008, time spent viewing TV was at an all-time high.

Annual Average	Time Spent Per Day
1950	4 hrs. 35 mins.
1955	4 hrs. 51 mins.
1960	5 hrs. 6 mins.
1965	5 hrs. 29 mins.
1970	5 hrs. 56 mins.
1975	6 hrs. 7 mins.
1980	6 hrs. 36 mins.
1985	7 hrs. 10 mins.
1990	6 hrs. 53 mins.
1995	7 hrs. 17 mins.
1996	7 hrs. 11 mins.
1997	7 hrs. 12 mins.
1998	7 hrs. 15 mins.
1999	7 hrs. 26 mins.
2000	7 hrs. 35 mins.
2001	7 hrs. 40 mins.
2002	7 hrs. 44 mins.
2003	7 hrs. 58 mins.
2004	8 hrs. 1 min.
2005	8 hrs. 11 mins.
2006	8 hrs. 14 mins.
2007	8 hrs. 14 mins.
2008	8 hrs. 21 mins.
2009	8 hrs. 21 mins.

Source: The Nielsen Company, NTI Annual Averages, 1994-present estimates based on start of broadcast season September to September. Beginning in 2007, estimates include Live+7 HUT viewing. Prior to 9/87: Audimeter Sample; 9/87 to present: People Meter Sample.

Time Spent Viewing: Persons

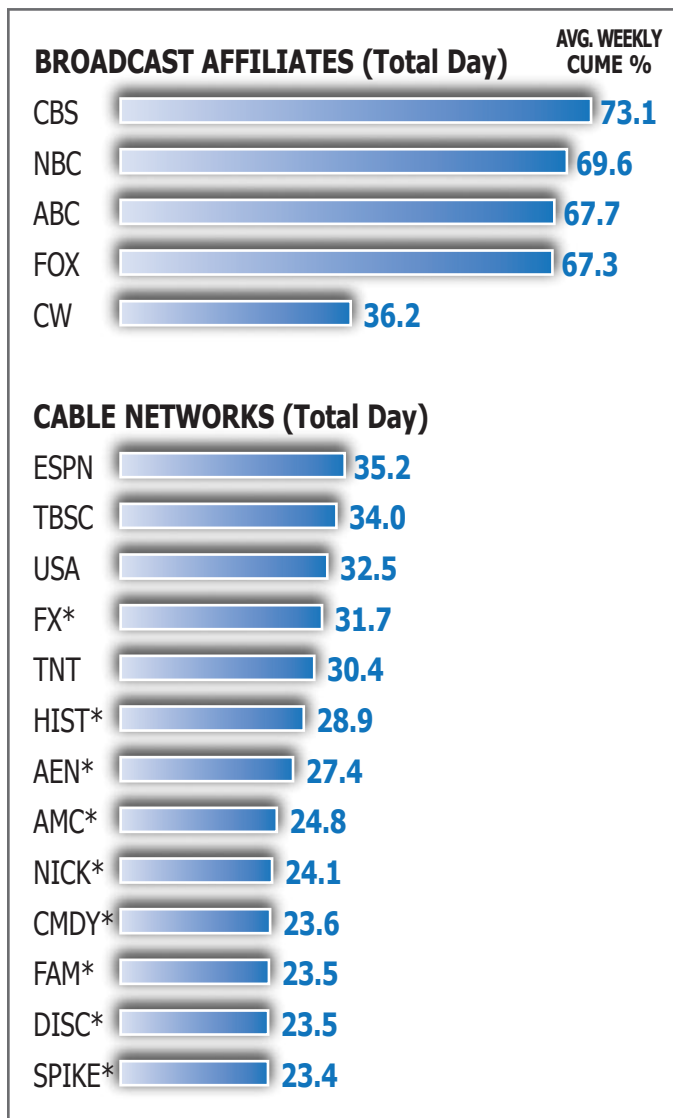
Traditionally, women in TV households have spent the most time viewing television, averaging over 5 hours a day in recent years. Men are next, with over 4.5 hours of daily viewing since 2005. Teens and children have been viewing at about the same levels, nearing the 3.5 hour mark. In 2009, Men increased to 4:54. Women, still No. 1, increased to 5:31. Teens went down to 3:26, and Children were up to 3:31.

Annual Average	Time Spent Per Day			
	Men	Women	Teens	Children
1988	3:59	4:41	3:18	3:22
1989	3:58	4:39	3:09	3:28
1990	3:51	4:28	3:15	3:18
1991	4:01	4:36	3:16	3:11
1992	4:02	4:40	3:10	3:08
1993	4:04	4:41	3:07	3:07
1994	4:02	4:39	3:05	3:06
1995	4:02	4:38	3:02	3:07
1996	3:58	4:34	2:49	2:59
1997	3:56	4:33	2:54	3:03
1998	3:57	4:33	2:58	2:57
1999	4:02	4:40	3:02	2:58
2000	4:11	4:46	3:04	3:07
2001	4:19	4:51	3:04	3:12
2002	4:22	4:58	3:09	3:10
2003	4:29	5:05	3:07	3:14
2004	4:26	5:07	3:07	3:16
2005	4:31	5:17	3:19	3:19
2006	4:35	5:17	3:22	3:26
2007	4:39	5:19	3:24	3:27
2008	4:49	5:25	3:27	3:28
2009	4:54	5:31	3:26	3:31

Source: The Nielsen Company, NTI Annual Averages, 1994-present data based on start of broadcast season September to September. Beginning in 2007, estimates include Live+7 PUT viewing plus DVR playback.

Reach: Broadcast vs. Cable

While cable penetration (wired and unwired) currently stands at approximately 90% of TV households, no individual cable network comes to anything near that by the end of an average week. Not one cable network tops 40%.



Source: The Nielsen Company
Television Activity Report
NHI 4th Qtr'11
Estimates include Live+7 days

*Cable networks did not telecast during the entire daypart.

Digital Cable

Nielsen estimates national digital cable penetration to be currently at 52.4%.

National Digital Cable Universe Estimates (%)		
	Digital Cable	Digital Cable with Pay
Jul-04	22.9	20.5
Nov-04	24.3	21.6
Feb-05	24.2	21.3
May-05	24.4	21.5
Jul-05	24.5	22.0
Nov-05	24.9	22.4
Feb-06	25.2	22.7
May-06	26.8	24.0
Jul-06	27.7	24.7
Nov-06	28.6	25.3
Feb-07	29.1	25.7
May-07	30.1	25.4
Jul-07	31.6	26.4
Nov-07	33.4	27.3
Feb-08	35.0	27.9
May-08	36.4	28.6
Jul-08	37.5	29.3
Nov-08	39.5	30.7
Feb-09	41.3	32.0
May-09	42.2	32.7
Jul-09	42.9	32.9
Nov-09	44.3	33.6
Feb-10	45.8	34.4
May-10	46.8	34.4
Jul-10	47.3	34.9
Nov-10	48.0	32.4
Feb-11	49.0	33.3
May-11	49.9	34.7
Jul-11	50.6	36.5
Nov-11	51.1	30.4
Feb-12	52.1	30.4
May-12	52.4	30.1

Source: The Nielsen Company, Media-Related Universe Estimates

Alternate Delivery Systems: Local

While national ADS penetration was at 31.1% in Feb. '12, many markets have already reached, and passed, 40%. It's important for local advertisers to know that ads inserted in local cable systems are not seen by viewers who get their programming from ADS.

DMA Rank	DMA Name	ADS as % of TV HH
164	Abilene-Sweetwater	55.2
150	Albany, GA	44.8
58	Albany-Schenectady-Troy	18.6
45	Albuquerque-Santa Fe	46.6
179	Alexandria, LA	41.8
208	Alpena	35.2
130	Amarillo	47.5
148	Anchorage	20.9
9	Atlanta	35.8
111	Augusta-Aiken	38.3
47	Austin	25.6
126	Bakersfield	36.5
27	Baltimore	20.3
155	Bangor	45.8
94	Baton Rouge	24.1
141	Beaumont-Port Arthur	45.1
193	Bend, OR	25.7
168	Billings	39.2
162	Biloxi-Gulfport	28.5
157	Binghamton	24.2
39	Birmingham (Ann and Tusc)	44.6
156	Bluefield-Beckley-Oak Hill	36.0
112	Boise	47.6
7	Boston (Manchester)	14.1
182	Bowling Green	22.8
51	Buffalo	29.9
95	Burlington-Plattsburgh	40.6
189	Butte-Bozeman	41.8
196	Casper-Riverton	35.3
89	Cedar Rapids-Wtrlo-IWC&Dub	32.9
82	Champaign&Sprngfld-Decatur	36.7
98	Charleston, SC	30.9
65	Charleston-Huntington	43.5
25	Charlotte	36.1
183	Charlottesville	35.2
86	Chattanooga	33.5
195	Cheyenne-Scottsbluff	36.8
3	Chicago	28.6
131	Chico-Redding	55.0
35	Cincinnati	28.3
170	Clarksburg-Weston	45.2
18	Cleveland-Akron (Canton)	23.7
90	Colorado Springs-Pueblo	47.7
77	Columbia, SC	39.7
138	Columbia-Jefferson City	54.2
127	Columbus, GA (Opelika, AL)	31.8
32	Columbus, OH	21.9
133	Columbus-Tupelo-W Pnt-Hstn	56.3
129	Corpus Christi	36.9
5	Dallas-Ft. Worth	33.7

Source: The Nielsen Company, NSI, Feb, 2012

continued...

Alternate Delivery Systems: Local

continued...

DMA Rank	DMA Name	ADS as % of TV HH
100	Davenport-R.Island-Moline	38.4
63	Dayton	24.4
17	Denver	41.6
72	Des Moines-Ames	41.6
11	Detroit	22.1
169	Dothan	39.4
139	Duluth-Superior	43.5
91	El Paso (Las Cruces)	32.8
174	Elmira (Corning)	27.8
146	Erie	31.2
121	Eugene	37.3
194	Eureka	25.9
104	Evansville	40.2
202	Fairbanks	29.7
117	Fargo-Valley City	34.5
68	Flint-Saginaw-Bay City	31.8
55	Fresno-Visalia	48.6
62	Ft. Myers-Naples	32.9
101	Ft. Smith-Fay-Sprngdl-Rgrs	39.3
109	Ft. Wayne	36.5
163	Gainesville	35.9
210	Glendive	27.3
184	Grand Junction-Montrose	32.0
42	Grand Rapids-Kalmzoo-B.Crk	32.1
190	Great Falls	46.3
69	Green Bay-Appleton	31.6
46	Greensboro-H.Point-W.Salem	34.6
99	Greenville-N.Bern-Washngtn	37.2
37	Greenvll-Spart-Ashevl-And	46.9
187	Greenwood-Greenville	36.1
87	Harlingen-Wslco-Brnsvl-McA	32.7
41	Harrisburg-Lncstr-Leb-York	25.7
178	Harrisonburg	37.4
30	Hartford & New Haven	15.9
167	Hattiesburg-Laurel	46.7
206	Helena	31.9
71	Honolulu	9.0
10	Houston	28.7
80	Huntsville-Decatur (Flor)	41.4
160	Idaho Falls-Pocatillo(Jcksn)	49.0
26	Indianapolis	28.7
93	Jackson, MS	51.9
176	Jackson, TN	37.9
50	Jacksonville	35.3
102	Johnstown-Altoona-St Colge	40.9
181	Jonesboro	35.7
149	Joplin-Pittsburg	49.0
207	Juneau	22.6
31	Kansas City	26.5
61	Knoxville	33.7
128	La Crosse-Eau Claire	32.7
188	Lafayette, IN	29.4
124	Lafayette, LA	35.6
175	Lake Charles	30.8
115	Lansing	35.1

Source: The Nielsen Company, NSI, Feb, 2012

continued...

Alternate Delivery Systems: Local

continued...

DMA Rank	DMA Name	ADS as % of TV HH
185	Laredo	30.3
40	Las Vegas	32.8
64	Lexington	44.5
201	Lima	21.9
105	Lincoln & Hastings-Krny	40.3
56	Little Rock-Pine Bluff	51.9
2	Los Angeles	36.0
48	Louisville	27.5
143	Lubbock	39.8
118	Macon	47.1
85	Madison	34.9
198	Mankato	26.7
180	Marquette	30.8
140	Medford-Klamath Falls	49.6
49	Memphis	39.7
186	Meridian	57.5
16	Miami-Ft. Lauderdale	25.6
34	Milwaukee	19.2
15	Minneapolis-St. Paul	28.7
152	Minot-Bismarck-Dickinson(WLSTN)	32.9
165	Missoula	49.7
60	Mobile-Pensacola (Ft. Walt)	38.8
137	Monroe-El Dorado	51.4
125	Monterey-Salinas	40.9
119	Montgomery-Selma	34.2
103	Myrtle Beach-Florence	28.3
29	Nashville	37.8
52	New Orleans	36.5
1	New York	12.9
43	Norfolk-Portsmouth-Newport News	24.2
209	North Platte	33.0
151	Odessa-Midland	35.6
44	Oklahoma City	30.2
76	Omaha	24.0
19	Orlando-Daytona Beach-Melbourne	26.5
199	Ottumwa-Kirkville	41.7
81	Paducah-Cape Girardeau-Harsburg	55.2
145	Palm Springs	24.8
159	Panama City	31.3
192	Parkersburg	24.1
116	Peoria-Bloomington	36.5
4	Philadelphia	15.5
13	Phoenix (Prescott)	42.1
23	Pittsburgh	23.8
22	Portland, OR	31.9
78	Portland-Auburn	25.2
205	Presque Isle	37.9
53	Providence-New Bedford	8.3
171	Quincy-Hannibal-Keokuk	48.7
24	Raleigh-Durham (Fayetteville)	35.0
173	Rapid City	30.7
108	Reno	45.0
57	Richmond-Petersburg	33.3
66	Roanoke-Lynchburg	51.1
79	Rochester, NY	18.5

Source: The Nielsen Company, NSI, Feb, 2012

continued...

Alternate Delivery Systems: Local

...continued

DMA Rank	DMA Name	ADS as % of TV HH
153	Rochester-Mason City-Austin	31.1
134	Rockford	33.1
20	Sacramento-Stokton-Modesto	41.5
144	Salisbury	21.1
33	Salt Lake City	41.1
197	San Angelo	40.8
36	San Antonio	30.1
28	San Diego	14.5
6	San Francisco-Oakland-San Jose	28.7
122	Santa Barbara-San Marcos-Santa Luis Obispo	39.2
92	Savannah	41.7
12	Seattle-Tacoma	19.8
161	Sherman-Ada	53.2
83	Shreveport	60.0
147	Sioux City	35.3
113	Sioux Falls(Mitchell)	28.0
97	South Bend-Elkhart	41.4
73	Spokane	47.4
75	Springfield, MO	55.8
114	Springfield-Holyoke	15.0
200	St. Joseph	31.3
21	St. Louis	39.3
84	Syracuse	16.7
106	Tallahassee-Thomasville	44.6
14	Tampa-St. Pete (Sarasota)	14.3
154	Terre Haute	52.9
74	Toledo	26.7
136	Topeka	32.8
120	Traverse City-Cadillac	44.1
96	Tri-Cities, TN-VA	39.8
70	Tucson (Sierra Vista)	40.3
59	Tulsa	38.5
191	Twin Falls	49.2
107	Tyler-Longview(Lufkin&Nacogdoches)	52.9
172	Utica	20.6
204	Victoria	29.5
88	Waco-Temple-Bryan	39.9
8	Washington, DC (Hagerstown)	22.8
177	Watertown	25.5
135	Wausau-Rhineland	39.6
38	West Palm Beach-Ft. Pierce	24.5
158	Wheeling-Steubenville	28.6
142	Wichita Falls & Lawton	53.0
67	Wichita-Hutchinson Plus	30.7
54	Wilkes Barre-Scranton-Hazleton	34.8
132	Wilmington	28.7
123	Yakima-Pasco-Richland-Kennewick	45.8
110	Youngstown	26.4
166	Yuma-El Centro	46.4
203	Zanesville	27.5

Source: The Nielsen Company, NSI, Feb, 2012

Alternate Delivery Systems: National

Total ADS is at an all-time high and has more than doubled since 2001. Wired Cable has seen penetration drop significantly over that same time period.

November	SMATV	% TV Households			TOTAL ADS	Wired Cable
		MMDS	Satellite DISH (Lg.)	DBS		
1996	0.9	1.3	1.8	2.1	6.0	69.5
1997	1.1	1.2	1.6	3.8	7.6	69.4
1998	0.7	0.9	1.5	5.9	9.0	69.8
1999	0.7	0.8	0.9	6.8	9.1	70.7
2000	0.8	0.6	1.0	9.2	11.4	70.2
2001	0.6	0.4	0.7	12.3	13.9	70.5
2002	0.6	0.3	0.5	15.3	16.5	69.1
2003	0.4	0.2	0.4	15.8	18.2	67.4
2004	0.5	0.0	0.3	18.5	19.2	66.4
2005	0.5	0.1	0.2	20.2	20.8	64.8
2006	0.4	0.0	0.1	24.0	24.5	62.1
2007	0.4	0.0	0.0	27.6	28.0	61.3
2008	0.3	0.0	0.0	28.4	28.7	61.3
2009	0.3	0.0	0.0	29.0	29.3	61.7
2010	0.3	0.0	0.1	30.2	30.5	60.7
2011	0.3	0.0	0.1	30.7	31.1	60.4

Satellite Master Antenna (SMATV): Serves housing complexes and hotels. Signals received via satellite and distributed by coaxial cable.

Microwave Multi Distribution System (MMDS): Distributes signals by microwave. Home receiver picks up signal, then distributes via internal wiring.

Satellite Dish (C-Band/KU Band) "Big Dish": Household receives transmissions from satellite(s) via a 1- to 3-meter dish.

Direct Broadcast Satellite (DBS): Satellite service delivered directly via household's own small (usually 18") dish.

Source: The Nielsen Company, NTI: People Meter Sample

Top 100 TV Programs of '11-'12 Season

Broadcast dominated the 2010-11 season, taking 96 of the top 100 programs (based on Household Live+SD ratings).

Rank	Program	Network	HH Live + SD U.S. AA%
1	Super Bowl XLVI	NBC	47.0
2	NFC Championship	FOX	30.6
3	AFC Championship	CBS	27.4
4	NFC Playoff-Sun	FOX	25.3
5	AFC Wildcard Playoff	CBS	24.0
6	Academy Awards	ABC	22.6
7	Grammy Awards	CBS	21.7
8	NFC Playoff-Sat	FOX	20.5
9	AFC Divisional Playoff-Su	CBS	19.0
10	AFC Divisional Playoff-Sa	CBS	18.5
11	NFL Playoff Game 2	NBC	18.2
12	NFC Wildcard Game	FOX	17.3
13	Super Bowl Pre Game 530P	NBC	16.9
14	NFL Sunday-National	FOX	15.4
15	NFL-Thursday	FOX	14.8
16	World Series Game 7	FOX	14.7
17	NFL National	CBS	14.5
18	NFL Single - Thursday	CBS	14.3
19	Oscar's Red Carpet Live-3	ABC	14.3
20	BCS Championship	ESPN	14.0
21	NFL Playoff Game 1	NBC	13.5
22	NFL Sat-National	FOX	12.9
23	World Series Game 6	FOX	12.7
24	NBC Sunday Night Football	NBC	12.4
25	NCAA Bskbl Championships	CBS	12.3
26	NFL Sunday-Single	FOX	12.1
27	Macy's Thanksgiving Parade	NBC	11.7
28	Super Bowl Pre Game 5P	NBC	11.6
29	Home Depot Prime Clg Ftbl-11/05/11	CBS	11.5
30	Dancing With The Stars	ABC	11.2
31	American Idol Aud Sp-1/22	FOX	11.1
32	NFC Championship-Pre	FOX	10.9
33	NCIS	CBS	10.8
34	American Idol-Wednesday	FOX	10.6
35	New Year's Rockin Eve Pt.1	ABC	10.5
36	NFL Single	CBS	10.5
37	Rose Bowl	ESPN	10.2
38	Oscar's Red Carpet Live-2	ABC	10.2
39	Golden Globe Awards	NBC	10.2
40	Dancing W/Stars Results	ABC	10.1
41	CMA Awards	ABC	9.9
42	American Idol-Thursday	FOX	9.8
43	AFC Wildcard Pre Game	CBS	9.8
44	NCAA Bskbl Champ Sa-2	CBS	9.6
45	American Idol Tue Sp-2/28(S)	FOX	9.4
46	NFC Playoff-Pre-Sun	FOX	9.4
47	World Series Game 4	FOX	9.2
48	Kentucky Derby	NBC	9.0
49	NCIS: Los Angeles	CBS	8.9
50	World Series Game 2	FOX	8.9

Rank	Program	Network	HH Live + SD U.S. AA%
51	World Series Game 5	FOX	8.8
52	The Big Bang Theory- Sp(S)-9/22	CBS	8.8
53	Super Bowl Pre Game 430P	NBC	8.8
54	60 Minutes - Sp 1/1	CBS	8.7
55	World Series Game 1	FOX	8.7
56	American Idol Tue Sp-5/22	FOX	8.7
57	Betty White 90th Birthday	NBC	8.5
58	Modern Family Sp-9/21	ABC	8.5
59	NCAA Bskbl Champ-Sa-1	CBS	8.4
60	NFL Regular Season	ESPN	8.4
61	Fiesta Bowl	ESPN	8.4
62	20/20 Sp Edition-11/14	ABC	8.4
63	NFL Single-Spc(S)	CBS	8.3
64	CBS Sunday Movie-Special	CBS	8.3
65	NCIS 9P-Special	CBS	8.2
66	NFL Sunday-Regional	FOX	8.2
67	The Big Bang Theory	CBS	8.2
68	AFC Championship Pre-Game	CBS	8.2
69	60 Minutes	CBS	8.1
70	Masters Golf Tourn.-Sun	CBS	8.0
71	NFL Sat-Regional	FOX	8.0
72	Nascar Daytona 500 Monday	FOX	8.0
73	The Voice	NBC	8.0
74	ACM Awards	CBS	7.9
75	Oscar's Red Carpet Live-1	ABC	7.8
76	World Series Game 7-Post	FOX	7.8
77	NCAA Bskbl-Bridge	CBS	7.8
78	NFL Regional	CBS	7.8
79	Super Bowl Pre Game 4P	NBC	7.7
80	Two And A Half Men	CBS	7.7
81	The Big Bang Theory: Sp 3/8/12	CBS	7.6
82	The Mentalist	CBS	7.6
83	Person Of Interest	CBS	7.5
84	Daytona 500 Red Flag-Begins	FOX	7.5
85	DWTS: Meet The Cast	ABC	7.5
86	Off Their Rockers	NBC	7.4
87	The Big Bang Theory: Sp 10/13/11	CBS	7.3
88	SEC Champ: Dr Pepper	CBS	7.3
89	How I Met Your Mother 830(S)-09/19/11	CBS	7.3
90	AFC-NFC Pro Bowl	NBC	7.3
91	Survivor: S. Pacific Final	CBS	7.3
92	Dancing W/Stars: Story(S)-03/27/12	ABC	7.3
93	Modern Family Sp-11/23	ABC	7.2
94	60 Minutes Special-04/08/2012	CBS	7.1
95	20/20 Sp Edition-4/23	ABC	7.1
96	Touch Preview 1/25	FOX	7.1
97	The Mentalist Friday-Sp	CBS	7.1
98	Criminal Minds	CBS	7.1
99	NCAA Bskbl Chmp Su-2	CBS	7.1
100	American Music Awards	ABC	6.8

Source: The Nielsen Company, 9/19/11-5/23/12; Programming under 25 min. excluded; Ranked by AA% (ratings); in the event of a tie, impressions (000's) are used as a tiebreaker.

Top 50 TV Specials of All Time

Special episodes and final episodes of long-running series, blockbuster mini-series and movies, holiday specials and sporting events are all represented on this list of top-rated specials.

Rank	Program	Date	Network	HH Rating
1	M*A*S*H (Final Episode)	2/28/1983	CBS	60.2
2	Dallas (Who Shot J.R.?)	11/21/1980	CBS	53.3
3	Roots Part VIII	1/30/1977	ABC	51.1
4	Super Bowl XVI	1/24/1982	CBS	49.1
5	Super Bowl XVII	1/30/1983	NBC	48.6
6	XVII Winter Olympics	2/23/1994	CBS	48.5
7	Super Bowl XX	1/26/1986	NBC	48.3
8	Gone With The Wind - Part 1	11/7/1976	NBC	47.7
9	Gone With The Wind - Part 2	11/8/1976	NBC	47.4
10	Super Bowl XII	1/15/1978	CBS	47.2
11	Super Bowl XIII	1/21/1979	NBC	47.1
12	Bob Hope Christmas Show	1/15/1970	NBC	46.6
13	Super Bowl XVIII	1/22/1984	CBS	46.4
13	Super Bowl XIX	1/20/1985	ABC	46.4
15	Super Bowl XIV	1/20/1980	CBS	46.3
16	Super Bowl XXX	1/28/1996	NBC	46.0
16	The Day After	11/20/1983	ABC	46.0
16	Super Bowl XLV	2/6/2011	FOX	46.0
19	Roots Part VI	1/28/1977	ABC	45.9
19	The Fugitive (Final Episode)	8/29/1967	ABC	45.9
21	Super Bowl XXI	1/25/1987	CBS	45.8
22	Roots Part V	1/27/1977	ABC	45.7
23	Super Bowl XXVIII	1/29/1994	NBC	45.5
23	Cheers (Final Episode)	5/20/1993	NBC	45.5
25	Ed Sullivan (The Beatles)	2/9/1964	CBS	45.3
26	Super Bowl XXVII	1/31/1993	NBC	45.1
27	Super Bowl XLIV	2/7/2010	CBS	45.0
27	Bob Hope Christmas Show	1/14/1971	NBC	45.0
29	Roots Part III	1/25/1977	ABC	44.8
30	Super Bowl XXXII	1/25/1998	NBC	44.5
31	Super Bowl XI	1/9/1977	NBC	44.4
31	Super Bowl XV	1/25/1981	NBC	44.4
33	Super Bowl VI	1/16/1972	CBS	44.2
34	XVII Winter Olympics	2/25/1994	CBS	44.1
34	Roots Part II	1/24/1977	ABC	44.1
36	Beverly Hillbillies	1/8/1964	CBS	44.0
37	Roots Part IV	1/26/1977	ABC	43.8
37	Ed Sullivan (The Beatles)	2/16/1964	CBS	43.8
39	Super Bowl XXIII	1/22/1989	NBC	43.5
40	Academy Awards	4/7/1970	ABC	43.4
41	Super Bowl XXXIV	1/30/2000	ABC	43.3
41	Super Bowl XXXI	1/26/1997	FOX	43.3
43	Thorn Birds Part III	3/29/1983	ABC	43.2
44	Super Bowl XLII	2/3/2008	FOX	43.1
44	Thorn Birds Part IV	3/30/1983	ABC	43.1
46	CBS NFC Championship	1/10/1982	CBS	42.9
47	Beverly Hillbillies	1/15/1964	CBS	42.8
48	Super Bowl VII	1/14/1973	NBC	42.7
49	Super Bowl XLI	2/4/2007	CBS	42.6
50	Thorn Birds Part II	3/28/1983	ABC	42.5

Source: The Nielsen Company January 1964 - December 2011

Note: Beginning 2006 estimates Live+SD. Prior to 2006 Live only.

Top 50 Sports Telecasts of All Time

Forty-one of the top 50 sports programs are Super Bowl games. In third place is the XVII Winter Olympics (2/23/94); this ratings spike can be attributed to the Harding/Kerrigan "incident."

Rank	Program	Date	Network	HH Rating
1	Super Bowl XVI	1/24/1982	CBS	49.1
2	Super Bowl XVII	1/30/1983	NBC	48.6
3	XVII Winter Olympics	2/23/1994	CBS	48.5
4	Super Bowl XX	1/26/1986	NBC	48.3
5	Super Bowl XII	1/15/1978	CBS	47.2
6	Super Bowl XIII	1/21/1979	NBC	47.1
7	Super Bowl XVIII	1/22/1984	CBS	46.4
7	Super Bowl XIX	1/20/1985	ABC	46.4
9	Super Bowl XIV	1/20/1980	CBS	46.3
10	Super Bowl XXX	1/28/1996	NBC	46.0
10	Super Bowl XLV	2/6/2011	FOX	46.0
12	Super Bowl XXI	1/25/1987	CBS	45.8
13	Super Bowl XXVIII	1/29/1994	NBC	45.5
14	Super Bowl XXVII	1/31/1993	NBC	45.1
15	Super Bowl XLIV	2/7/2010	CBS	45.0
16	Super Bowl XXXII	1/25/1998	NBC	44.5
17	Super Bowl XI	1/9/1977	NBC	44.4
17	Super Bowl XV	1/25/1981	NBC	44.4
19	Super Bowl VI	1/16/1972	CBS	44.2
20	XVII Winter Olympics	2/25/1994	CBS	44.1
21	Super Bowl XXIII	1/22/1989	NBC	43.5
22	Super Bowl XXXI	1/26/1997	FOX	43.3
22	Super Bowl XXXIV	1/30/2000	ABC	43.3
24	Super Bowl XLII	2/3/2008	FOX	43.1
25	NFC Championship Game	1/10/1982	CBS	42.9
26	Super Bowl VII	1/14/1973	NBC	42.7
27	Super Bowl XLI	2/4/2007	CBS	42.6
28	Super Bowl IX	1/12/1975	NBC	42.4
29	Super Bowl X	1/18/1976	CBS	42.3
30	Super Bowl XLIII	2/1/2009	NBC	42.0
31	Super Bowl XXV	1/27/1991	ABC	41.9
31	Super Bowl XXII	1/31/1988	ABC	41.9
33	Super Bowl VIII	1/13/1974	CBS	41.6
33	Super Bowl XL	2/5/2006	ABC	41.6
35	Super Bowl XXXVIII	2/1/2004	CBS	41.4
36	Super Bowl XXIX	1/29/1995	ABC	41.3
37	Super Bowl XXXIX	2/6/2005	FOX	41.1
38	Super Bowl XXXVII	1/6/2003	ABC	40.7
39	Super Bowl XXXVI	2/3/2002	FOX	40.4
39	Super Bowl XXXV	1/28/2001	CBS	40.4
41	Super Bowl XXVI	1/26/1992	CBS	40.3
42	Super Bowl XXXIII	1/31/1999	FOX	40.2
43	World Series Game #6	10/21/1980	NBC	40.0
44	Super Bowl V	1/17/1971	NBC	39.9
45	World Series Game #7	10/22/1975	NBC	39.6
46	World Series Game #4	10/6/1963	NBC	39.5
47	Super Bowl IV	1/11/1970	CBS	39.4
48	Super Bowl XXIV	1/28/1990	CBS	39.0
49	World Series Game #7	10/27/1986	NBC	38.9
50	World Series Game #7	10/20/1982	NBC	38.2

Source: The Nielsen Company January 1964 - December 2011

Note: Beginning 2006 estimates Live+SD. Prior to 2006 Live only.

Top 100 Sports Shows, 2011: Households

Rank	Program	Network	Date	U.S. AA%*
1	FOX Super Bowl XLV	FOX	2/6/11	46.1
2	FOX Superbowl XLV Kickoff	FOX	2/6/11	31.9
3	FOX Super Bowl Post Game	FOX	2/6/11	28.6
4	AFC Championship On CBS	CBS	1/23/11	28.4
5	FOX NFC Championship	FOX	1/23/11	28.2
6	AFC Divisional Playoff-Su	CBS	1/16/11	24.2
7	FOX NFC Wildcard Game	FOX	1/9/11	22.1
8	AFC Divisional Playoff-Sa	CBS	1/15/11	19.5
9	FOX NFC Playoff-Sun	FOX	1/16/11	19.1
10	NBC NFL Playoff Game 2	NBC	1/8/11	18.7
11	FOX Super Bowl Pre - 5:30	FOX	2/6/11	17.7
12	AFC Wildcard Playoff	CBS	1/9/11	17.1
13	FOX NFC Playoff-Sat	FOX	1/15/11	17.1
14	NBC NFL Playoff Game 1	NBC	1/8/11	16.8
15	NBC NFL Thursday Special	NBC	9/8/11	16.1
16	FOX NFL Sunday-National	FOX	1/2/11	15.8
17	BCS Championship	ESPN	1/10/11	15.4
18	FOX NFL-Thu	FOX	11/24/11	14.9
19	FOX World Series Game 7	FOX	10/28/11	14.7
20	CBS NFL Single - Thu	CBS	11/24/11	14.4
21	CBS NFL National	CBS	1/2/11	13.8
22	NBA Finals On ABC-Gm 6	ABC	6/12/11	13.4
23	FOX NFL Sat-National	FOX	12/24/11	12.9
24	FOX Super Bowl Pre - 5:00	FOX	2/6/11	12.8
25	FOX World Series Game 6	FOX	10/27/11	12.8
26	NBC Sunday Night Football	NBC	1/2/11	12.5
27	NBA Trophy Presentation	ABC	6/12/11	12.4
28	FOX NFL Sunday-Single	FOX	9/18/11	12.3
29	FOX NFC Championship-Post	FOX	1/23/11	11.7
30	CBS NCAA Bskbl Champships	CBS	4/4/11	11.7
31	Rose Bowl	ESPN	1/1/11	11.3
32	NBA Finals On ABC-Gm 5	ABC	6/9/11	10.8
33	CBS NFL Single	CBS	9/11/11	10.3
34	FOX NFC Championship-Pre	FOX	1/23/11	9.8
35	NBA Finals On ABC-Gm 4	ABC	6/7/11	9.7
36	FOX Super Bowl Pre - 4:30	FOX	2/6/11	9.6
37	CBS NCAA Bskbl Champ Sa-2	CBS	4/2/11	9.6
38	Masters Golf Tourn.-Sun	CBS	4/10/11	9.6
39	FOX NFC Wildcard Pre	FOX	1/9/11	9.4
40	NBA Finals On ABC-Gm 2	ABC	6/2/11	9.3
41	FOX World Series Game 4	FOX	10/23/11	9.2
42	NBA Finals On ABC-Gm 3	ABC	6/5/11	9.1
43	NBA Finals On ABC-Gm 1	ABC	5/31/11	9.1
44	AFC Championship Pre-Game	CBS	1/23/11	9.0
45	ESPN NFL Regular Season	ESPN Sports Network	9/12/11	9.0
46	CBS NCAA Bskbl Chmp Su-2	CBS	3/27/11	8.9
47	FOX World Series Game 2	FOX	10/20/11	8.9
48	FOX World Series Game 5	FOX	10/24/11	8.9
49	NFL Kickoff 2011- 8P	NBC	9/8/11	8.8
50	FOX Nascar Daytona 500	FOX	2/20/11	8.7

Rank	Program	Network	Start Date	U.S. AA%*
51	FOX NFL Sunday-Regional	FOX	1/2/11	8.7
52	FOX World Series Game 1	FOX	10/19/11	8.7
53	Kentucky Derby	NBC	5/7/11	8.6
54	NFL Regular Season	ESPN	9/12/11	8.4
55	CBS NFL Single-Spc	CBS	12/24/11	8.4
56	AFC Wildcard Post Game	CBS	1/9/11	8.3
57	CBS NCAA Bskbl Champ-Sa-1	CBS	4/2/11	8.3
58	Sugar Bowl	ESPN	1/4/11	8.2
59	Home Depot Prime Clg Ftbl	CBS	10/1/11	8.1
60	FOX NFL Sat-Regional	FOX	12/24/11	8.0
61	FOX Wrlld Series Gm7-Post	FOX	10/28/11	7.9
62	FOX AFC-NFC Pro Bowl	FOX	1/30/11	7.8
63	CBS NFL Regional	CBS	1/2/11	7.8
64	CBS NCAA Bskbl-Bridge	CBS	4/2/11	7.7
65	FOX Super Bowl Pre - 4:00	FOX	2/6/11	7.6
66	ESPN NFL Regular Season 2	ESPN Sports Network	9/12/11	7.6
67	SEC Champ-CBS: Dr Pepper	CBS	12/3/11	7.4
68	CBS NFL Today-Sun-Div-Plf	CBS	1/16/11	7.1
69	Outback Bowl	ABC	1/1/11	7.1
70	FOX MLB All-Star Game	FOX	7/12/11	6.9
71	FOX Super Bowl Pre - 3:30	FOX	2/6/11	6.8
72	Orange Bowl	ESPN	1/3/11	6.8
73	CBS NCAA Bskbl Chmp Sa-2	CBS	3/26/11	6.6
74	FOX World Series Game 3	FOX	10/22/11	6.6
75	CBS NCAA Bskbl Chmp Su-1	CBS	3/27/11	6.5
76	CBS NCAA Bskbl Chmp Fr 2	CBS	3/25/11	6.5
77	Masters Golf Tourn. Sat.	CBS	4/9/11	6.5
78	NBC NFL Pre-Ssn 8/21	NBC	8/21/11	6.4
79	CBS NFL Today-Sat-Div-Plf	CBS	1/15/11	6.3
80	CBS NCAA Bskbl Chmp-Su-2	CBS	3/20/11	6.3
81	College Football Spcl	CBS	11/25/11	6.3
82	Fiesta Bowl	ESPN	1/1/11	6.2
83	AT&T Cotton Bowl	FOX	1/7/11	5.8
84	NBA Playoffs On ABC-Su5	ABC	5/1/11	5.8
85	CBS NCAA Bskbl Chmp Sa-1	CBS	3/26/11	5.8
86	NBA Christmas Special-2	ABC	12/25/11	5.7
87	CBS NCAA Bskbl Chmp-Su-3	CBS	3/20/11	5.6
88	NBC NFL Pre-Ssn 8/28	NBC	8/28/11	5.6
89	FOX Super Bowl Pre - 3:00	FOX	2/6/11	5.6
90	Preakness	NBC	5/21/11	5.6
91	Football Nt America Prgam	NBC	1/8/11	5.5
92	Kentucky Derby Pre	NBC	5/7/11	5.4
93	FOX NFC Playoff-Pre-Sun	FOX	1/16/11	5.4
94	CBS NCAA Bskbl Chmp Th 2	CBS	3/24/11	5.4
95	NFL On FOX Preseason 2	FOX	8/18/11	5.3
96	NBA Playoffs On ABC-Su6	ABC	5/8/11	5.3
97	FOX MLB ALCS Game 3	FOX	10/11/11	5.3
98	FOX MLB All-Star Pre	FOX	7/12/11	5.2
99	FOX MLB ALCS Game 4	FOX	10/12/11	5.2
100	NBA Playoffs On ABC-Sa2	ABC	5/7/11	5.0

Source: 1/1-12/31 2011 Nielsen Galaxy Lightning Estimates

*Live+7 estimates.

Ranked by average audience % (ratings); in the event of a tie, impressions (000's) are used as a tiebreaker. Ad-supported Subscription Television only. Programming under 25 minutes excluded.

Top 25 Awards/Parade/Pageant Shows, 2011: Households

Rank	Event	Network	Date	U.S. AA%*
1	Academy Awards	ABC	2/27/11	21.6
2	Grammy Awards	CBS	2/13/11	15.3
3	Macy's Thanksgiving Parade	NBC	11/24/11	11.8
4	CMA Awards	ABC	11/9/11	10.6
5	Golden Globe Awards	NBC	1/16/11	10.2
6	ACM Awards	CBS	4/3/11	7.9
7	Emmy Awards	FOX	9/18/11	7.8
8	American Music Awards	ABC	11/20/11	7.2
9	People's Choice Awards	CBS	1/5/11	6.3
10	Kennedy Center Honors	CBS	12/27/11	5.7
11	Billboard Music Awards	ABC	5/22/11	4.8
12	Tony Awards	CBS	6/12/11	4.6
13	American Country Awards	FOX	12/5/11	4.6
14	Miss USA 2011	NBC	6/19/11	4.4
15	Miss America	ABC	1/15/11	4.2
16	Daytime Emmy Awards	CBS	6/19/11	3.8
17	Thanksgiving Day Parade	CBS	11/24/11	3.8
18	Tourn. Roses Parade	ABC	1/1/11	3.7
19	Tournament-Roses Parade	NBC	1/1/11	3.7
20	Miss Universe Pageant.	NBC	9/12/11	3.5
21	Latin Grammy 11	UNI	11/10/11	3.0
22	Disney Parks Xmas Parade	ABC	12/25/11	2.9
23	Premio Lo Nuestro 11	UNI	2/17/11	2.7
24	Countdown-Emmys '11	FOX	9/18/11	2.4
25	Premios Juventud 11	UNI	7/21/11	2.3

Source: 1/1-12/31 2011 Nielsen Galaxy Lightning Estimates.
 * Live+7 estimates.
 Ranked by average audience % (ratings); in the event of a tie, impressions (000's) are used as a tiebreaker. Programming under 25 minutes excluded.

Top 25 Awards/Parade/Pageant Shows, 2011: Adults 25-54

Rank	Event	Network	Date	A25-54 U.S. AA%*
1	Academy Awards	ABC	2/27/11	13.6
2	Grammy Awards	CBS	2/13/11	11.1
3	Macy's Thanksgiving Parade	NBC	11/24/11	7.4
4	Golden Globe Awards	NBC	1/16/11	6.3
5	CMA Awards	ABC	11/9/11	6.2
6	American Music Awards	ABC	11/20/11	5.0
7	Emmy Awards	FOX	9/18/11	4.9
8	ACM Awards	CBS	4/3/11	4.4
9	Billboard Music Awards	ABC	5/22/11	3.5
10	People's Choice Awards	CBS	1/5/11	3.3
11	American Country Awards	FOX	12/5/11	2.6
12	Miss USA 2011	NBC	6/19/11	2.5
13	Latin Grammy 11	UNI	11/10/11	2.4
14	Premio Lo Nuestro 11	UNI	2/17/11	2.2
15	Thanksgiving Day Parade	CBS	11/24/11	2.2
16	Miss America	ABC	1/15/11	2.0
17	Disney Parks Xmas Parade	ABC	12/25/11	2.0
18	Miss Universe Pageant.	NBC	9/12/11	1.9
19	Premios Juventud 11	UNI	7/21/11	1.9
20	Tony Awards	CBS	6/12/11	1.7
21	Kennedy Center Honors	CBS	12/27/11	1.7
22	Tourn. Roses Parade	ABC	1/1/11	1.6
23	Tournament-Roses Parade	NBC	1/1/11	1.5
24	Countdown-Emmys '11	FOX	9/18/11	1.4
25	Daytime Emmy Awards	CBS	6/19/11	1.3

Source: 1/1-12/31 2011 Nielsen Galaxy Lightning Estimates.
 * Live+7 estimates.
 Ranked by average audience % (ratings); in the event of a tie, impressions (000's) are used as a tiebreaker. Programming under 25 minutes excluded.

Top Reality Shows, 2010–2011 Season: Households

Rank	Program	Network	U.S. AA%*
1	Oscar's Red Carpet Live-3	ABC	15.6
2	American Idol-Wednesday	FOX	14.5
3	Dancing With The Stars	ABC	13.8
4	American Idol-Thursday	FOX	13.4
5	American Idol Tue Sp-3/1	FOX	12.9
6	American Idol Tue Sp-5/24	FOX	12.4
7	Dancing W/Stars Results	ABC	11.8
8	Oscar's Red Carpet Live-2	ABC	9.9
9	Bachelor:After Final Rose	ABC	9.3
10	Dancing W/Stars Sp-4/26	ABC	8.4
11	Dancing W/Stars: Story	ABC	8.3
12	America's Got Talent-Tue	NBC	8.2
13	Dancing W/Stars Result Sp	ABC	8.0
14	Survivor:Nicaragua Finale	CBS	7.9
15	America's Got Talent 7/5	NBC	7.8
16	Voice	NBC	7.8
17	Survivor: RI Finale	CBS	7.7
18	Oscar's Red Carpet Live-1	ABC	7.6
19	Survivor: Nicaragua	CBS	7.6
20	America's Got Talent-Wed	NBC	7.6
21	Dancing W/Stars-Tue 8P	ABC	7.5
22	Survivor:South Pacific-Sp	CBS	7.3
23	Survivor: Redemption Isld	CBS	7.2
24	Bachelor, The	ABC	7.0
25	Christmas-Rockefeller Cen	NBC	7.0
26	Amazing Race 17	CBS	6.8
27	Survivor: Nicaragua Rnion	CBS	6.8
28	Survivor: RI Reunion	CBS	6.7
29	Secret Millionaire	ABC	6.6
30	Bachelorette:After Rose	ABC	6.6
31	Live To Dance Special	CBS	6.6
32	Voice:Results Show	NBC	6.6
33	Mobbed Sp-3/31 9P	FOX	6.4
34	America's Got Talent 6/22	NBC	6.2
35	Bachelor Sp-1/17, The	ABC	6.2
36	Undercover Boss	CBS	6.1
37	Bachelorette, The	ABC	6.0
38	Victoria's Secret Fashion	CBS	5.9
39	Amazing Race 18 - Special	CBS	5.9
40	Amazing Race 18	CBS	5.8
41	Super Bowl Great Commrcls	CBS	5.6
42	Sing Off 12/13	NBC	5.6
43	Apprentice 11	NBC	5.5
44	Sing Off 12/6	NBC	5.5
45	Sing Off 12/20	NBC	5.5
46	Sing Off 12/15	NBC	5.4
47	Survivor: Nicaragua Sp	CBS	5.3
48	Biggest Loser 11	NBC	5.2
49	Bachelorette Sp-5/30, The	ABC	5.2
50	Big Brother 13-Wed	CBS	5.1

Source: The Nielsen Company, Galaxy Lightning Estimates 9/20/10-9/18/11.

Shows identified by date or as a special were one-time programs, programs that aired outside the regular time slot, or episodes that extended beyond the regularly scheduled time periods. Ranked by average audience % (ratings); in the event of a tie, impressions (000's) are used as a tiebreaker.

* Live+7 estimates

Top Reality Shows, 2010–2011 Season: Adults 25–54

Rank	Program	Network	A25-54 U.S. AA%*
1	American Idol-Wednesday	FOX	10.6
2	American Idol Tue Sp-3/1	FOX	10.2
3	American Idol-Thursday	FOX	9.3
4	Oscar's Red Carpet Live-3	ABC	8.7
5	American Idol Tue Sp-5/24	FOX	8.4
6	Dancing With The Stars	ABC	6.5
7	Survivor:Nicaragua Finale	CBS	6.1
8	Voice	NBC	6.1
9	Bachelor:After Final Rose	ABC	5.9
10	Survivor: RI Finale	CBS	5.7
11	Survivor: Nicaragua	CBS	5.6
12	Dancing W/Stars Results	ABC	5.5
13	Survivor:South Pacific-Sp	CBS	5.3
14	Survivor: Nicaragua Rnion	CBS	5.2
15	Survivor: Redemption Isld	CBS	5.1
16	Survivor: RI Reunion	CBS	5.1
17	Oscar's Red Carpet Live-2	ABC	5.0
18	America's Got Talent-Tue	NBC	5.0
19	America's Got Talent 7/5	NBC	4.9
20	Mobbed Sp-3/31 9P	FOX	4.8
21	Amazing Race 17	CBS	4.8
22	America's Got Talent-Wed	NBC	4.6
23	Voice:Results Show	NBC	4.5
24	Bachelor, The	ABC	4.2
25	Apprentice 11	NBC	4.1
26	Hell's Kitchen-Mon 9P	FOX	4.1
27	Amazing Race 18 - Special	CBS	4.0
28	Amazing Race 18	CBS	4.0
29	Bachelorette:After Rose	ABC	3.9
30	Sing Off 12/13	NBC	3.9
31	Secret Millionaire	ABC	3.9
32	Hell's Kitchen-Tue	FOX	3.9
33	Dancing W/Stars: Story	ABC	3.8
34	Biggest Loser 11	NBC	3.8
35	Big Brother 13-Thu	CBS	3.8
36	Big Brother 13-Wed	CBS	3.8
37	Undercover Boss	CBS	3.7
38	Dancing W/Stars Result Sp	ABC	3.7
39	Biggest Loser 10	NBC	3.7
40	Big Brother 13-Sun	CBS	3.7
41	Hell's Kitchen	FOX	3.6
42	America's Got Talent 6/22	NBC	3.6
43	Sing Off 12/15	NBC	3.6
44	Dancing W/Stars Sp-4/26	ABC	3.6
45	Bachelor Sp-1/17, The	ABC	3.6
46	Oscar's Red Carpet Live-1	ABC	3.6
47	Masterchef Sp-8/16 8P	FOX	3.5
48	Sing Off 12/6	NBC	3.5
49	Victoria's Secret Fashion	CBS	3.5
50	Biggest Loser 10 11/2	NBC	3.5

Source: The Nielsen Company, Galaxy Lightning Estimates 9/20/10-9/18/11.

Shows identified by date or as a special were one-time programs, programs that aired outside the regular time slot, or episodes that extended beyond the regularly scheduled time periods. Ranked by average audience % (ratings); in the event of a tie, impressions (000's) are used as a tiebreaker.

* Live+7 estimates

Top Syndicated Programs, 2009-2010 Season: Households

2009-2010 Season (8/31/09 - 8/29/10)			HHLD U.S. AA%	HHLD U.S.** GAA%
Rank	Program	Syndicator		
1	Wheel of Fortune	CTD	6.5	NA
2	Jeopardy	CTD	5.5	NA
3	Two-Half Men	WB	4.7	6.2
4	Judge Judy	CTD	4.4	6.9
5	Oprah Winfrey Show	CTD	4.3	4.4
6	Entertainment Tonight	CTD	4.2	4.2
7	Family Guy	20TH TV	3.3	3.9
7	Made in Hollywood (S) 12/27/09	CEC	3.3	4.6
9	CSI: New York	CTD	3.2	3.7
10	Made in Hollywood (S) 3/28/10	CEC	3.1	4.2
11	Inside Edition	CTD	3.0	3.0
11	Wheel of Fortune-Wknd	CTD	3.0	NA
13	Law & Order: CI	NBU	2.9	3.9
13	Office	NBU	2.9	3.4
15	Everybody Loves Raymond	CTD	2.8	3.5
15	Made in Hollywood (S) 6/27/10	CEC	2.8	3.8
17	Seinfeld	SONY	2.7	3.1
18	Dr. Phil Show	CTD	2.6	2.6
18	George Lopez	WB	2.6	3.7
20	Law & Order: SVU	NBU	2.5	2.9
20	Live with Regis and Kelly	DAD	2.5	NA
20	Seinfeld-Wknd	SONY	2.5	2.8
23	Dr. Oz Show	SONY	2.4	2.5
23	Millionaire	DAD	2.4	2.7
25	Century 19*	20TH TV	2.3	2.4
25	King of the Hill	20TH TV	2.3	2.7
25	Two-Half Men-Wknd	WB	2.3	2.4
28	Bones	20TH TV	2.2	2.5
28	CSI: Miami	CTD	2.2	2.5
30	Century Premiere*	20TH TV	2.1	2.2
30	Ellen Degeneres Show	WB	2.1	2.1
30	Friends	WB	2.1	2.6
30	Imagination VII*	DAD	2.1	2.2
30	Judge Joe Brown	CTD	2.1	3.1
30	Made in Hollywood (S) 9/20/09	CEC	2.1	3.2
30	Revolution 1A*	20TH TV	2.1	2.1
37	Access Hollywood	NBU	2.0	2.0
37	Buena Vista IX*	DAD	2.0	2.1
37	Buena Vista VI*	DAD	2.0	2.0
37	Entertainment Tonight-Wknd	CTD	2.0	2.1
37	Maury	NBU	2.0	2.3
37	People's Court	WB	2.0	2.1
37	Revolution 1*	20TH TV	2.0	2.0
44	Buena Vista XI*	DAD	1.9	2.0
44	Everybody Loves Raymond-Wknd	CTD	1.9	1.9
44	House	NBU	1.9	2.2
44	TMZ	WB	1.9	2.0
44	WWE Friday Night Smackdown	20TH TV	1.9	NA
44	Doctors	CTD	1.8	NA
44	Everybody Hates Chris	CTD	1.8	2.0
44	Without a Trace	WB	1.8	1.9

Source: 8/31/09-8/29/10 The Nielsen Company, Galaxy Explorer Live+SD estimates. Ranked by AA%
 *Movie Package; **Gross Average Audience; (S) indicates a special

Top Syndicated Programs, 2009-2010 Season: Adults 25-54

2009-2010 Season (8/31/09 - 8/29/10)			A25-54 U.S. AA%	A25-54 U.S.** GAA%
Rank	Program	Syndicator		
1	Two-Half Men	WB	2.9	3.8
2	Wheel of Fortune	CTD	2.2	NA
3	Family Guy	20TH TV	2.1	2.4
4	Office	NBU	2.0	2.4
5	Judge Judy	CTD	1.9	2.8
5	Made in Hollywood (S) 12/27/09 (S)	CEC	1.9	2.4
7	Entertainment Tonight	CTD	1.8	1.9
7	Jeopardy	CTD	1.8	NA
7	Made in Hollywood (S) 3/28/10	CEC	1.8	2.4
7	Oprah Winfrey Show	CTD	1.8	1.8
7	Seinfeld	SONY	1.8	2.1
12	CSI: New York	CTD	1.6	1.8
12	Everybody Loves Raymond	CTD	1.6	2.0
12	Made in Hollywood (S) 6/27/10	CEC	1.6	2.0
12	Seinfeld-Wknd	SONY	1.6	1.9
16	Two-Half Men-Wknd	WB	1.4	1.4
16	Friends	WB	1.4	1.7
16	Law & Order: CI	NBU	1.4	1.8
19	Century 19*	20TH TV	1.3	1.4
19	Century Premiere*	20TH TV	1.3	1.3
19	Inside Edition	CTD	1.3	1.3
19	Law & Order: SVU	NBU	1.3	1.5
19	TMZ	WB	1.3	1.4
24	CSI: Miami	CTD	1.2	1.3
24	Imagination VII*	DAD	1.2	1.2
24	King of the Hill	20TH TV	1.2	1.4
24	Revolution 1A*	20TH TV	1.2	1.3
28	Bones	20TH TV	1.1	1.3
28	Buena Vista IX*	DAD	1.1	1.2
28	Buena Vista VI*	DAD	1.1	1.2
28	Everybody Loves Raymond-Wknd	CTD	1.1	1.1
28	Family Guy-Wknd	20TH TV	1.1	1.4
28	House	NBU	1.1	1.2
28	Made in Hollywood (S) 9/20/09	CEC	1.1	1.4
28	Maury	NBU	1.1	1.3
28	My Name Is Earl	20TH TV	1.1	1.3
28	Revolution 1*	20TH TV	1.1	1.1
28	WWE Friday Night Smackdown	20TH TV	1.1	NA
39	Access Hollywood	NBU	1.0	1.1
39	Buena Vista XI*	DAD	1.0	1.0
39	Dr. Oz Show	SONY	1.0	1.0
39	Dr. Phil Show	CTD	1.0	1.0
39	Ellen Degeneres Show	WB	1.0	1.0
39	Entertainment Tonight-Wknd	CTD	1.0	1.0
39	George Lopez	WB	1.0	1.3
39	House of Payne	20TH TV	1.0	1.2
39	King of Queens	SONY	1.0	1.2
39	Live with Regis and Kelly	DAD	1.0	NA
39	Sex and the City	WB	1.0	1.2
50	Buena Vista VII*	DAD	0.9	1.0
50	Cold Case	WB	0.9	1.0
50	Cops	20TH TV	0.9	1.0
50	Extra	WB	0.9	0.9
50	Frasier	CTD	0.9	1.1

Source: 8/31/09-8/29/10 The Nielsen Company, Galaxy Explorer Live+SD estimates. Ranked by AA%
 *Movie Package; **Gross Average Audience; (S) indicates a special

Network TV Activity By Length of Commercial

Originally the 60-second commercial was the standard for the broadcast TV networks, a carry-over from radio days. By the mid-1960s the :30 was in use, first as a :30/:30 piggy-back, later as a stand-alone, and soon replaced the :60 as the standard. While :15s grew rapidly in the late 1980s, their growth has slowed. They now comprise 39% of commercials, with :10s making up 1%, and the newest 2009 addition :05s at just 0.1%.

NETWORKS	% OF TOTAL						
	:10s	:15s	:20s	:30s	:45s	:60s	:90s+
1965	—	—	—	—	—	100.0*	—
1970	—	—	—	25.1	—	74.9*	—
1975	—	—	—	79.0	—	21.0*	—
1980	0.7	—	—	94.6	2.7	1.9	0.1
1985	1.3	10.1	0.8	83.5	1.7	2.2	0.4
1990	0.1	35.4	1.4	60.1	1.0	1.7	0.3
1995	0.2	31.5	0.9	64.8	0.6	1.2	0.8
1996	0.3	33.0	0.5	63.9	0.3	1.2	0.8
1997	0.2	33.1	0.2	64.2	0.3	1.3	0.7
1998	0.1	31.4	0.1	63.0	0.7	3.4	1.3
1999	0.3	31.0	0.2	60.3	0.7	5.6	1.9
2000	1.1	31.9	0.1	58.7	0.7	5.8	1.7
2001	0.9	34.5	0.1	55.8	0.5	6.5	1.8
2002	0.8	33.7	0.3	58.0	0.1	5.7	1.3
2003	0.4	37.7	0.1	55.8	0.3	4.9	0.9
2004	0.6	38.6	0.1	53.5	0.5	5.7	1.0
2005	0.7	37.4	0.2	54.0	0.3	5.9	1.5
2006	0.7	37.7	0.3	54.1	0.4	5.9	0.9
2007	0.7	38.1	0.3	54.5	0.3	5.3	0.7
2008	0.7	39.8	0.4	51.3	0.2	7.0	0.6
2009	1.1	39.1	0.4	50.9	0.1	7.0	1.3

Source: Kantar Media Annual Averages *Includes :30/:30 piggy-backs

Station TV Activity by Length of Commercial

While :60s dominated early on, :10s and :20s were part of the mix. By the mid-1970s, :30s accounted for about 80% of total commercials; while still dominant, :30s have been on the decline and now account for 65.9% of the total. The use of :10s and :20s have declined over the years while :15s have been rising slowly and now account for 20.4% of the total. The use of :60s currently stands at 7.7%, while :10s comprise 3.6% and the latest 2009 addition, :05s, is at 1.4%.

STATIONS	% OF TOTAL						
	:10s	:15s	:20s	:30s	:45s	:60s	:90s+
1965	16.1	—	13.3	0.8	—	69.8*	—
1970	11.8	—	4.5	48.1	—	35.6*	—
1975	9.1	—	0.5	79.2	—	11.2*	—
1980	7.8	—	0.2	85.1	0.2	3.9	2.8
1985	5.5	1.3	0.1	88.0	0.6	2.7	1.8
1990	4.0	5.9	0.1	84.4	0.2	3.7	1.7
1995	3.3	7.3	0.2	84.9	0.1	3.3	0.9
1996	3.2	8.3	0.2	83.5	0.1	4.0	0.7
1997	2.7	9.0	0.1	83.1	0.1	4.4	0.6
1998	3.2	9.3	0.1	82.0	0.1	4.7	0.6
1999	3.2	9.5	0.2	81.4	0.1	5.0	0.7
2000	3.3	9.0	0.2	81.4	0.1	5.1	0.9
2001	4.1	11.2	0.7	77.7	0.1	5.4	0.9
2002	3.6	11.6	0.6	78.6	0.1	4.8	0.8
2003	3.5	12.2	0.3	78.3	0.1	4.9	0.7
2004	3.3	12.5	0.3	77.7	0.1	5.7	0.5
2005	3.4	13.3	0.4	76.8	0.1	6.0	0.1
2006	3.3	14.0	0.3	76.2	0.1	6.1	0.1
2007	3.4	15.4	0.2	74.1	0.0	6.6	0.2
2008	3.4	17.0	0.4	71.2	0.1	7.6	0.3
2009	3.6	20.4	0.6	65.9	0.1	7.7	0.2

Source: Kantar Media Annual Averages * :60s and :90s+

Commercial Television Stations

The total number of commercial TV stations on the air at the beginning of 1950 was 96, all VHF stations (ch. 2-13). By 1990 there were about 1,100 stations, evenly split between VHF and UHF (ch. 14+).

YEAR	TOTAL	VHF	UHF
1950	96	96	—
1955	411	297	114
1960	515	440	75
1965	569	481	88
1970	677	501	176
1975	706	514	192
1980	734	516	218
1985	883	520	363
1990	1,092	547	545
1995	1,161	562	599
2000	1,248	564	684
2001	1,302	571	731
2002	1,303	571	732
2003	1,341	586	755
2004	1,361	591	770
2005	1,375	594	781
2006	1,372	585	787
2007	1,364	584	780
2008	1,353	578	775
2009	1,379	364	1,015
2010	1,383	364	1,019
2011	1,381	356	1,025

Source: Television & Cable Factbook, Jan. each year

Advertising Expenditures by Medium: 3-Year Track

In 2011 and 2009, advertising on broadcast television – including Spot TV, Network TV, Spanish-Language Network TV and Syndication – represented 36.2% of total measured media expenditures. In 2010, a political year, it climbed to 37.5%.

MEDIA	2009		2010		2011	
	\$ in Millions	% of Total	\$ in Millions	% of Total	\$ in Millions	% of Total
GRAND TOTAL	117,483,516.1	100%	124,453,122.4	100%	127,977,458.5	100%
Network TV	21,855,499.7	18.6%	22,936,915.4	18.4%	22,452,008.7	17.5%
Spot TV	12,921,885.3	11.0%	15,891,516.8	12.8%	15,160,466.9	11.8%
SLN TV	3,485,816.0	3.0%	3,698,042.7	3.0%	4,060,540.5	3.2%
Net Cable TV	19,478,814.1	16.6%	21,412,414.7	17.2%	23,223,102.2	18.1%
Syndication	4,229,144.5	3.6%	4,111,205.7	3.3%	4,746,172.2	3.7%
Magazines	19,476,720.3	16.6%	20,078,096.2	16.1%	20,070,456.6	15.7%
Sunday Magazines	1,694,817.0	1.4%	1,772,325.8	1.4%	1,645,349.2	1.3%
Local Magazines	331,884.6	0.3%	335,244.6	0.3%	327,831.9	0.3%
Natl Newspapers	2,435,063.8	2.1%	2,501,041.4	2.0%	2,410,573.8	1.9%
Newspapers	16,037,001.9	13.7%	15,291,258.2	12.3%	14,930,327.8	11.7%
Network Radio	889,666.6	0.8%	908,970.9	0.7%	933,078.7	0.7%
Natl Spot Radio	1,579,814.5	1.3%	1,875,227.0	1.5%	1,767,623.9	1.4%
US Int-Display	9,882,846.8	8.4%	10,131,708.4	8.1%	12,494,578.9	9.8%
Outdoor	3,184,541.0	2.7%	3,509,154.6	2.8%	3,755,347.3	2.9%

Source: TVB analysis of Kantar Media data.

Top 25 Spot TV Advertisers*

The Ford Dealer Association, with \$354 million, was the top Spot TV advertiser in 2011. Rounding out the top five spots were XFINITY (\$261 million), AT&T (\$255 million), The Toyota Dealer Association (\$237 million) and Verizon (\$171 million).

Rank	Advertiser	2011 \$
1	Ford Dealer Assn	354,037.5
2	XFINITY	260,684.5
3	AT&T	255,040.5
4	Toyota Dealer Assn	237,250.8
5	Verizon	170,922.2
6	Dodge	170,630.6
7	Honda	155,567.3
8	Hyundai Dealer Assn	154,089.9
9	Time Warner Cable	150,548.7
10	McDonalds Restaurant	150,398.5
11	Nissan	121,751.6
12	Chevrolet Dealer Assn	105,912.9
13	Jeep	99,995.9
14	General Mills	99,036.0
15	Empire Today	98,744.4
16	Citi	90,025.4
17	Subway Restaurant	87,655.7
18	Chrysler	84,589.7
19	Rooms To Go Furniture Store	83,597.4
20	Chase	83,183.6
21	Toyota	82,895.6
22	Chevrolet	81,810.5
23	Volkswagen	70,913.5
24	Kia	70,187.5
25	Lincoln	66,580.7
*Includes both local and national spot activity Source: TVB analysis of estimates supplied by Kantar Media. Top 125 markets.		

Top 25 Spot TV Categories*

The Automotive category tops the list at \$2.7 billion, while Communications/Telecommunications comes in at No. 2 with \$1.4 billion. Restaurants is No. 3, followed by Car & Truck Dealers and Financial.

Rank	Category	2011 \$
1	Automotive	2,678,455.1
2	Communications/Telecommunications	1,435,104.5
3	Restaurants	1,227,024.8
4	Car & Truck Dealers	852,612.2
5	Financial	701,174.9
6	Furniture Stores	665,758.9
7	Legal Services	574,008.1
8	Insurance	560,601.8
9	Schools, Colleges & Camps	520,289.0
10	Travel, Hotels & Resorts	449,994.8
11	Government and Organizations	420,274.8
12	Food and Food Products	420,201.9
13	Leisure Time Activities & Events	401,475.2
14	Food Stores & Supermarkets	316,468.7
15	Motion Pictures	160,342.9
16	Media & Advertising	156,387.6
17	Home Centers & Hardware Stores	145,448.6
18	Department Stores	125,546.6
19	Clothing Stores	121,731.0
20	Toiletries & Cosmetics	111,242.0
21	Prescription Medication & Pharmaceutical Houses	109,212.2
22	Political	109,090.8
23	Medicines and Remedies (excluding Rx)	97,641.9
24	Beverages	93,463.4
25	Discount Department Stores	91,183.0
*Includes both local and national spot activity Source: TVB analysis of estimates supplied by Kantar Media. Top 125 markets.		

Top 25 Syndicated TV Categories

Toiletries & Cosmetics, with over \$546 million, tops the list of syndicated advertising categories. Medicines & Remedies (excluding Rx), with over \$426 million, and Prescription Medications & Pharmaceutical Houses, with over \$355 million, round out the top 3.

Rank	Category	2011 \$
1	Toiletries & Cosmetics	546,670.0
2	Medicines and Remedies (excluding Rx)	426,103.8
3	Prescription Medication & Pharmaceutical Houses	355,711.8
4	Food and Food Products	283,873.7
5	Household Soaps, Cleaners, Polishes & Supplies	272,533.9
6	Insurance	255,095.7
7	Restaurants	250,576.0
8	Communications/Telecommunications	197,618.1
9	Automotive	188,515.8
10	Confectionery & Snacks	170,026.1
11	Motion Pictures	163,480.7
12	Financial	160,134.9
13	Discount Department Stores	122,423.6
14	Department Stores	120,061.2
15	Beverages	103,890.4
16	Consumer Electronics & Video Stores	72,744.5
17	Travel, Hotels & Resorts	57,494.6
18	Legal Services	51,424.2
19	Clothing Stores	45,571.8
20	Pets, Pet Foods & Supplies	44,736.9
21	Media & Advertising	43,816.6
22	Games, Toys and Hobbycraft	39,944.5
23	Household Appliances & Equipment	36,571.5
24	Eyeglasses, Medical Equipment & Supplies	33,123.2
25	Audio and Video Equipment & Supplies	29,831.3
Source: TVB from estimates supplied by Kantar Media.		

Top 25 Broadcast Network TV Categories

Seven advertising categories spent more than \$1 billion each on network television in 2011. Topping the list was Automotive with over \$3.0 billion, followed by Communications/Telecommunications with over \$2.2 billion.

Rank	Category	2011 \$
1	Automotive	3,038,706.8
2	Communications/Telecommunications	2,253,774.3
3	Restaurants	1,529,283.9
4	Motion Pictures	1,417,426.8
5	Financial	1,216,004.1
6	Toiletries & Cosmetics	1,171,046.1
7	Prescription Medication & Pharmaceutical Houses	1,165,543.0
8	Food and Food Products	870,926.0
9	Insurance	868,238.8
10	Computers and Software	716,485.4
11	Medicines and Remedies (excluding Rx)	639,383.9
12	Beverages	585,808.0
13	Beer & Wine	419,318.2
14	Discount Department Stores	402,465.0
15	Department Stores	399,571.8
16	Household Soaps, Cleaners, Polishes & Supplies	383,981.6
17	Audio and Video Equipment & Supplies	333,057.6
18	Confectionery & Snacks	319,847.6
19	Travel, Hotels & Resorts	298,088.0
20	Home Centers & Hardware Stores	274,418.9
21	Clothing Stores	254,314.8
22	Games, Toys and Hobbycraft	186,265.4
23	Media & Advertising	174,283.7
24	Consumer Electronics & Video Stores	164,496.3
25	Pets, Pet Foods & Supplies	141,322.7
Source: TVB from estimates supplied by Kantar Media.		

Top 25 Subscription TV Categories (Network)

Seven advertising categories spent more than \$1 billion each on network subscription television in 2011. Automotive, with over \$1.7 billion, topped the list, followed by Restaurants (1.4 billion) and Insurance (\$1.3 billion).

Rank	Category	2011 \$
1	Automotive	1,771,701.8
2	Restaurants	1,399,148.5
3	Insurance	1,325,312.5
4	Toiletries & Cosmetics	1,156,580.1
5	Communications/Telecommunications	1,155,233.4
6	Food and Food Products	1,077,672.0
7	Motion Pictures	1,044,174.0
8	Financial	948,812.7
9	Games, Toys and Hobbycraft	793,243.7
10	Medicines and Remedies (excluding Rx)	646,500.3
11	Prescription Medication & Pharmaceutical Houses	621,741.7
12	Household Soaps, Cleaners, Polishes & Supplies	611,646.8
13	Confectionery & Snacks	591,012.8
14	Beverages	446,120.7
15	Media & Advertising	436,581.4
16	Travel, Hotels & Resorts	427,573.4
17	Computers and Software	397,479.8
18	Beer & Wine	361,544.3
19	Audio and Video Equipment & Supplies	340,840.6
20	Department Stores	256,778.3
21	Discount Department Stores	253,159.2
22	Home Centers & Hardware Stores	247,720.0
23	Apparel, Footwear and Accessories	223,459.0
24	Household Appliances & Equipment	187,357.7
25	Schools, Colleges & Camps	181,899.5

Source: TVB from estimates supplied by Kantar Media.
Note: Subscription TV = programming delivered by wired cable, satellite or telecom provider.

Top 25 Spanish Language Network (SLN) Categories

Communications/Telecommunications, with over \$507 million, tops the list of Spanish-Language Network categories. Financial, with over \$356 million, and Automotive, with over \$277 million, round out the top 3.

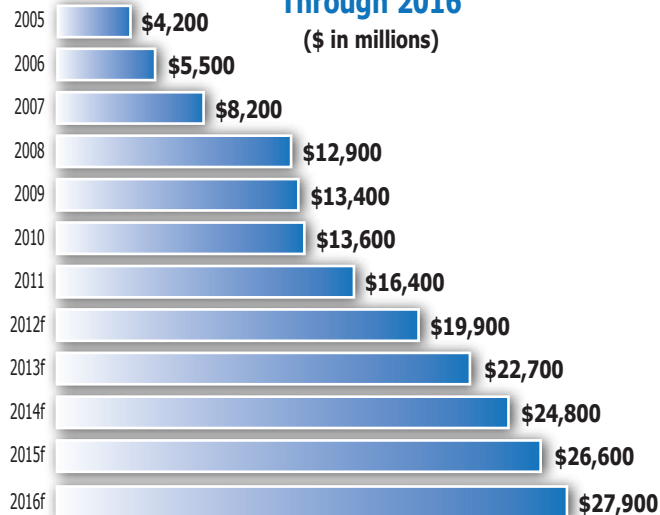
Rank	Category	2011 \$
1	Communications/Telecommunications	507,616.9
2	Financial	356,748.1
3	Automotive	277,623.7
4	Restaurants	253,842.3
5	Toiletries & Cosmetics	220,918.9
6	Food and Food Products	212,590.2
7	Insurance	163,660.0
8	Beer & Wine	149,340.0
9	Household Soaps, Cleaners, Polishes & Supplies	121,577.2
10	Discount Department Stores	115,010.0
11	Motion Pictures	109,400.5
12	Department Stores	107,700.4
13	Confectionery & Snacks	90,303.7
14	Medicines and Remedies (excluding Rx)	83,564.8
15	Audio and Video Equipment & Supplies	82,414.7
16	Home Centers & Hardware Stores	75,006.3
17	Beverages	73,184.1
18	Government and Organizations	56,320.6
19	Computers and Software	31,662.8
20	Schools, Colleges & Camps	18,820.0
21	Clothing Stores	16,602.4
22	Media & Advertising	15,880.8
23	Travel, Hotels & Resorts	14,489.8
24	Games, Toys and Hobbycraft	14,167.7
25	Shoe Stores	13,862.1

Source: TVB from estimates supplied by Kantar Media.

Total Local Online Advertising

Local online media sales accounted for 18% of all local advertising in 2011, or \$16.4 billion out of \$91.2 billion. That made it the second-largest category behind newspapers. And it's closing the gap fast.

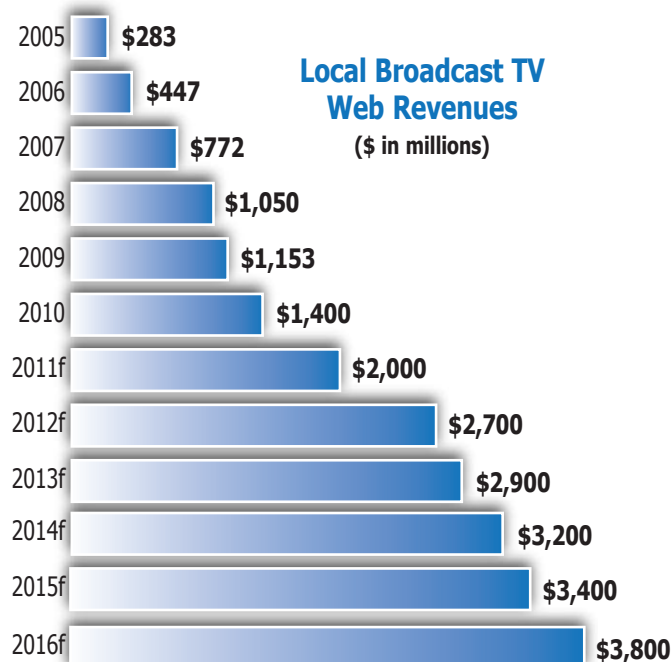
Local Online Ad Revenue Trends Through 2016



Source: © 2012, Borrell Associates, Inc. 2012-2016: forecast. All rights reserved.

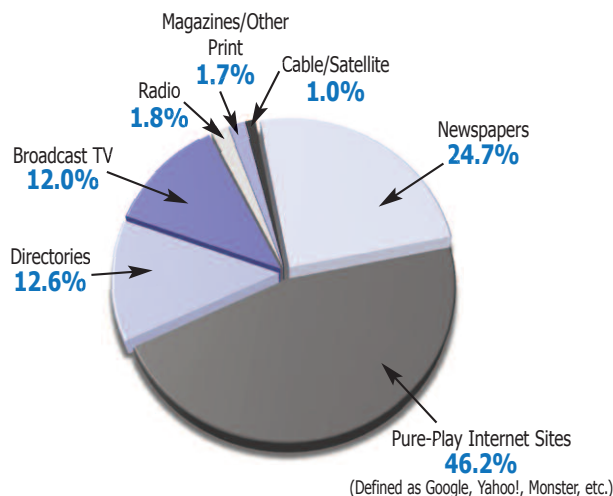
Local Station Website Strength

Local TV stations have been outpacing the overall growth in digital advertising. Estimates for last year's revenue for local broadcasters were \$1.97 billion, an increase of 41% over 2010. Forecasts for 2012 are continued robust growth of 35%, to \$2.7 billion.



Source: © 2012, Borrell Associates, Inc. 2012-2016: forecast. All rights reserved.

2011 Local Online Ad Revenues by Media Choice



Source: © 2012, Borrell Associates, Inc. All rights reserved.

TV Stations Increasing Targeted Advertising

Stations remain dependent on display advertising, although their dependence on "static" banner ads declined from 60% of all online ad sales in 2010 to 58% last year. Targeted banner sales increased 66% from 2010 levels for TV stations. Streaming video advertising sold by stations also increased, up 31% from 2010 to \$338 million (with newspapers at \$328.2 million).

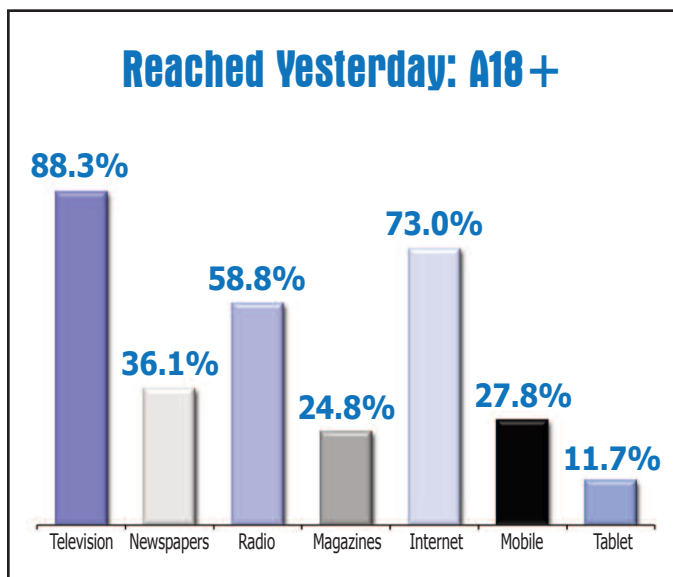
Broadcast TV Stations Online Revenues (\$ in millions)

Untargeted Banners	\$1,157.9
Targeted Banners	\$228.8
Paid Search	\$57.8
E-mail	\$190.9
Streaming Video	\$338.0
Total	\$1,973.5

Source: © 2012, Borrell Associates, Inc. All rights reserved.

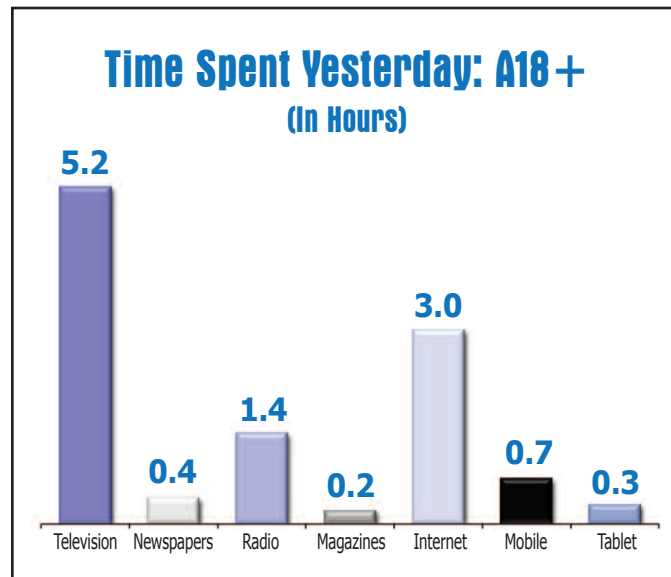
Television Reaches More Adults Each Day Than Other Medium

Television reaches almost 90% of adults 18+ in the average day, while radio reaches approximately 60% and newspapers, 36%. The same holds true across all demographic groups.



Adults Spend More Time With Television Each Day

In the average day, adults 18+ spend more time with television than with newspapers, radio, magazines, the Internet, and mobile combined. Similar dominance is seen across all demographic groups.



TV Reaches More People Across All Major Age Groups (%)

Age	Television	Newspapers	Radio	Magazines	Internet	Mobile Phone	Tablet
18+	88.3	36.1	58.8	24.8	73.0	27.8	11.7
18-34	84.0	21.4	59.7	16.2	74.2	46.0	16.8
18-49	85.3	23.9	62.3	19.5	75.4	39.7	14.5
25-49	86.0	24.1	64.6	20.2	74.9	38.8	14.3
25-54	86.7	26.5	65.3	20.4	75.6	36.2	14.6
35-64	89.1	36.2	63.2	25.6	75.2	24.9	11.4
65+	93.7	61.3	44.1	37.4	64.3	4.8	4.1
13-17	76.6	14.4	56.9	24.2	76.3	21.3	17.1

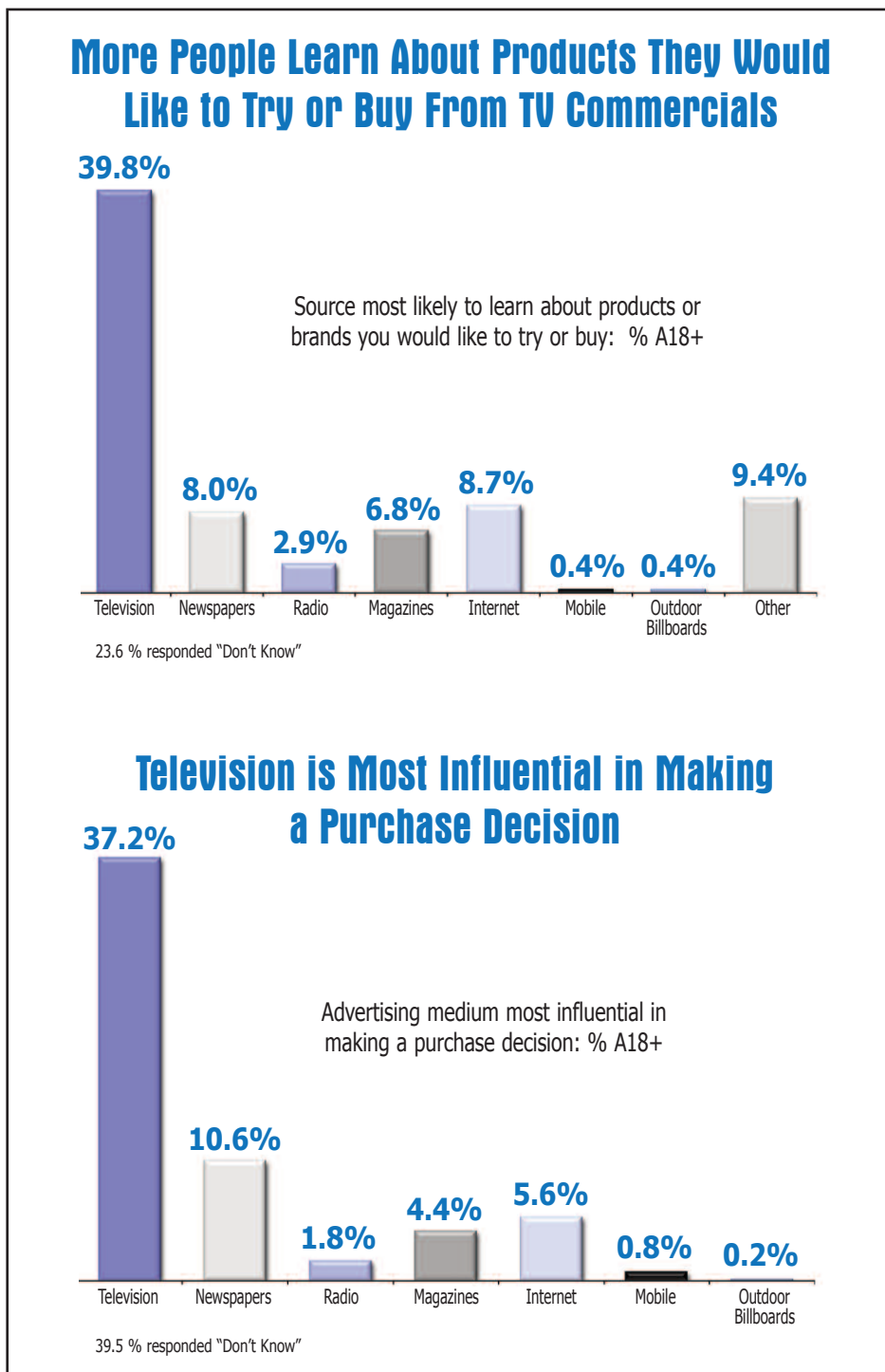
Time Spent with TV Tops Other Media Across Demographic Groups

Average Daily Time Spent (In Hours)

Age	Television	Newspapers	Radio	Magazines	Internet	Mobile Phone	Tablet
18+	5.20	0.40	1.42	0.24	3.01	0.68	0.31
18-34	4.46	0.23	1.34	0.20	3.50	1.37	0.50
18-49	4.62	0.24	1.53	0.19	3.34	1.05	0.42
25-49	4.75	0.26	1.63	0.20	3.10	0.89	0.37
25-54	4.69	0.30	1.68	0.20	3.12	0.80	0.38
35-64	5.24	0.38	1.58	0.21	3.01	0.48	0.27
65+	6.38	0.74	1.07	0.41	2.16	0.09	0.08
13-17	3.14	0.11	1.01	0.16	2.30	1.12	0.39

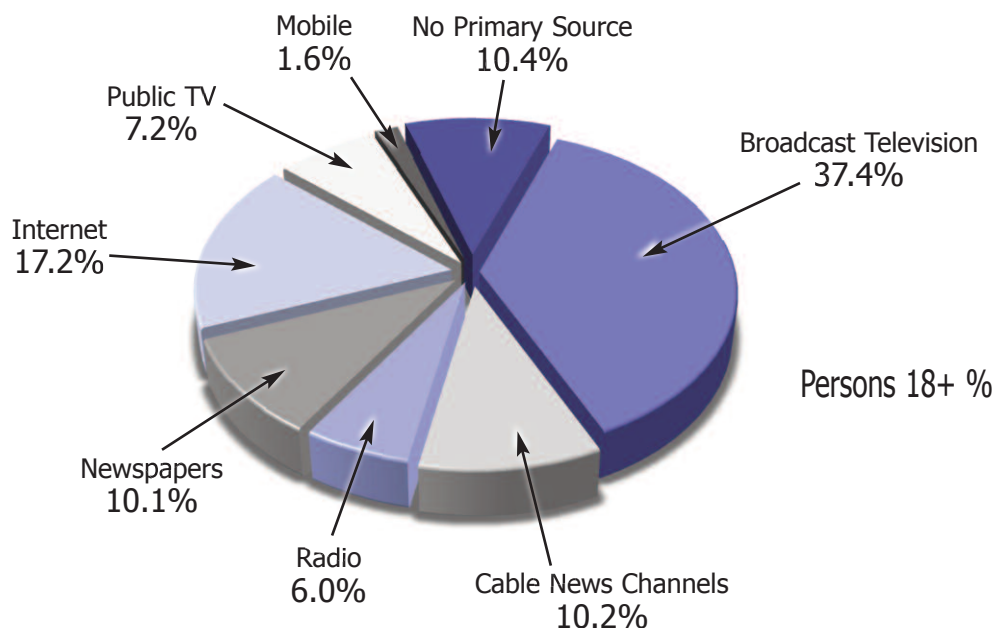
Source: TVB Media Comparisons Study 2012. Knowledge Networks Inc. Custom Survey.

Television Advertising is the Most Effective Among Adults 18+

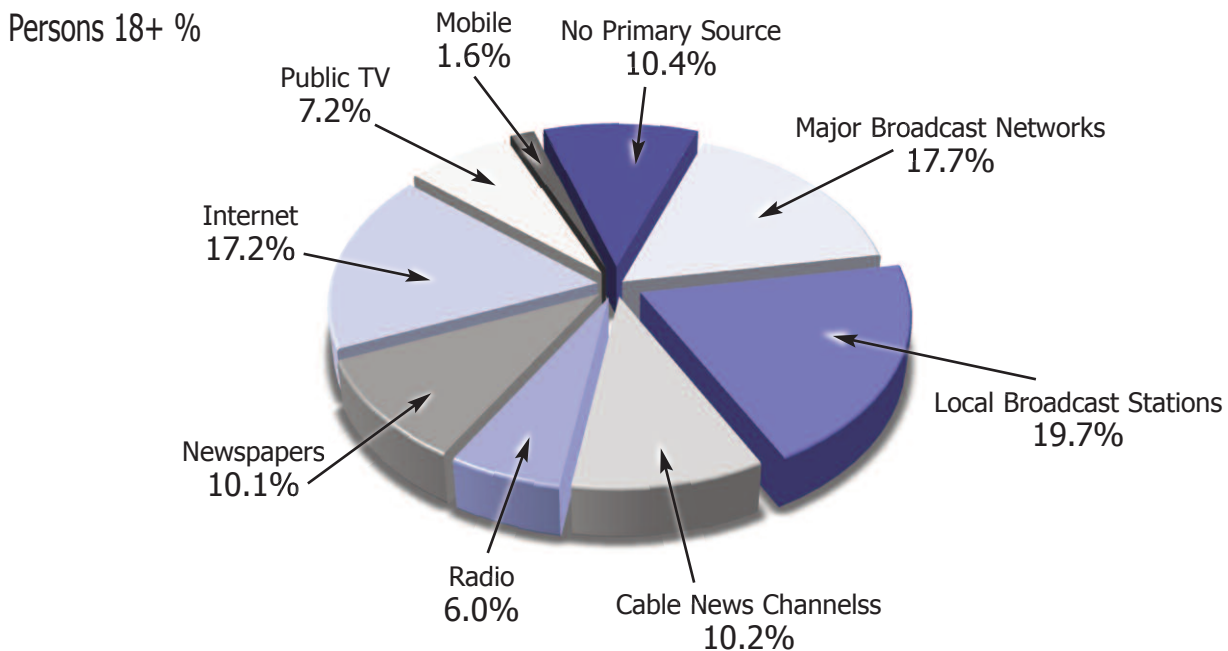


Source: TVB Media Comparisons Study 2012. Knowledge Networks Inc. Custom Survey.

Broadcast Television is the Primary Source of News for Adults

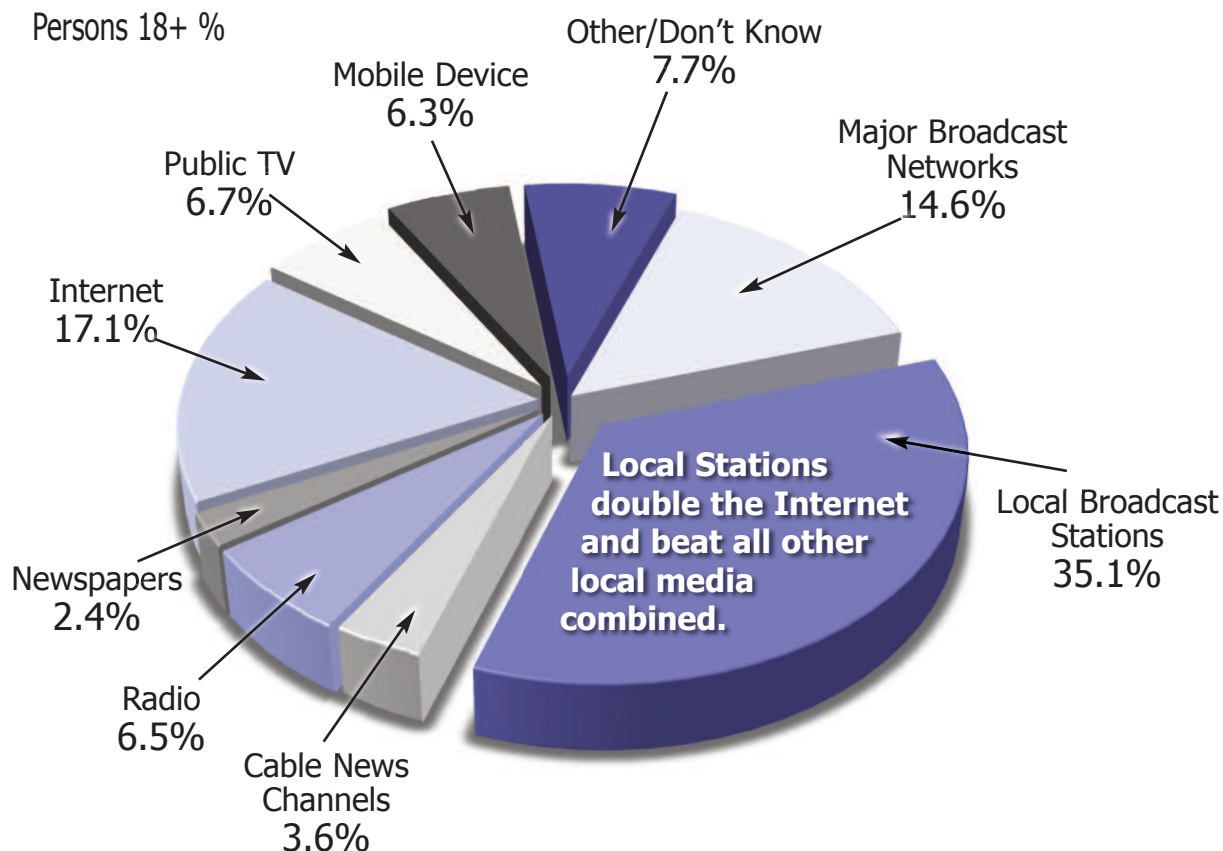


Local Broadcast Stations Out-Deliver Cable as a Primary Choice for News



Source: TVB Media Comparisons Study 2012. Knowledge Networks Inc. Custom Survey.

Local Broadcast Stations are the Top Source for Local Weather, Traffic or Sports



Local Broadcast Station Websites are the Top Source for Local News and Event Information

Local Website (s) %	P13-17	A18+	A18-34	A18-49	A25-54	A35-64	A65+
Broadcast Station	54.5	57.4	53.7	57.1	58.2	59.4	57.5
Newspaper	23.5	41.3	41.1	40.5	39.7	40.6	44.6
Radio	15.2	9.8	12.2	10.7	11.4	9.6	5.1
Other Local Site(s)	15.7	6.6	5.1	5.6	6.4	7.5	6.4
None/Don't know	-	1.8	0.7	1.8	1.8	2.6	1.0

Source: TVB Media Comparisons Study 2012. Knowledge Networks Inc. Custom Survey.

Political Ads on Broadcast Television

All politics is local, and the bulk of political dollars are spent on local broadcast stations.

2005-2011

Includes Candidate, Ballot, and Off-Ballot Issue Advertising

Year	Broadcast Network	Spot/Local	Total
2005	\$100,832,127	\$479,365,367	\$580,197,494
2006	\$155,047,883	\$1,980,056,595	\$2,135,104,478
2007	\$60,434,889	\$318,062,606	\$378,497,495
2008	\$160,703,686	\$1,548,571,694	\$1,709,275,380
2009	\$265,551,281	\$493,218,337	\$758,769,618
2010	\$163,923,661	\$2,085,721,307	\$2,249,644,968
2011	\$134,048,700	\$402,941,410	\$536,990,110

Source: TVB analysis of Kantar Media/CMAG data.

2010 Top Political Markets

In 2010, over \$1.8 billion (\$1,839,805,954) was spent on candidates running for office, with 19 states seeing \$30 million or more.

Rank	State	2010 Dollars
1	CA	\$302,654,734
2	FL	\$199,011,287
3	TX	\$112,509,726
4	PA	\$112,079,719
5	NY	\$100,136,688
6	IL	\$91,825,559
7	OH	\$76,594,540
8	WI	\$54,652,955
9	MI	\$51,199,420
10	MA	\$50,478,434
11	NV	\$44,515,317
12	GA	\$42,277,374
13	CO	\$40,774,437
14	CT	\$39,114,149
15	TN	\$36,240,367
16	AL	\$34,852,552
17	MO	\$31,812,780
18	AZ	\$31,548,692
19	KY	\$30,054,593
19-market total:		\$1,482,333,323

Source: TVB analysis of Kantar Media/CMAG data.

Political Outlook by Program Type

Local broadcast news is one of the strongest television vehicles for reaching potential voters; for this reason, local news is always a key component of political ad buys. In addition, there are other program genres that warrant consideration; the following table is based on national data and highlights the key program types that attract people of various political persuasions.

	Very Conservative	Somewhat Conservative	Middle of the Road	Somewhat Liberal	Very Liberal
Awards-Specials	85	123	126	136	115
Comedy/Variety	109	106	106	89	78
Daytime Talk/Variety	64	108	127	122	106
Documentary/Information: Prime	94	118	120	113	100
Early Evening/Network News: M-F	94	121	118	117	94
Early Morning News	89	96	105	92	80
Early Morning Talk/Information/News	89	113	123	110	92
Entertainment Specials	121	130	127	116	87
Feature Films: Prime	110	88	87	60	91
Game Shows: Prime	88	112	103	116	81
General Drama: Prime	98	112	118	107	100
Late Night Network News/Info: M-F	99	100	98	102	97
Late Night Talk/Variety	80	102	116	146	142
News-Specials	97	124	132	138	115
Pageants	122	139	106	100	77
Reality-based	94	111	113	94	80
Situation Comedies: Prime	77	107	119	130	123
Sunday News/Interview	137	121	107	111	90

Example: Viewers who consider themselves "Somewhat Conservative" are 30% more likely than all Adults 18+ to view Entertainment Specials.

Political Outlook – Usually Think Of Yourself As: Very Conservative...Very Liberal
Source: 2011 Doublebase GfK MRI

Political Advertising & Government Regulation

Congress, the Federal Communications Commission and the Federal Election Commission regulate broadcast political advertising of candidates and issues. Regulation focuses on two principal areas:

Access: Only federal candidates have access rights. Stations must honor a federal candidate demand to purchase time.

Rates: Federal, state and local candidates receive a station's best rate for its most favored advertiser during pre-election periods (the "lowest unit charge"). Issue advertisers are not entitled to the lowest unit charge.

From these flow additional basic elements of broadcast political advertising:

Equality: Any candidate may demand the same terms of a time buy that an opponent has purchased within the preceding seven days (the famed "equal opportunities" clause). Issue advertisers are not entitled to equal opportunities.

Placement: Television news is a sacrosanct safe harbor from access demands. News adjacencies must be made available, however.

Appearance: The right to the lowest unit charge is personal to a candidate, and therefore the candidate must personally appear in an ad to receive the lowest unit charge. Otherwise, comparable commercial rates apply.

Pre-Election: The lowest unit charge must be made available within 45 days of a primary and 60 days of a general election. At other times, comparable commercial rates apply.

Sponsor ID: A political ad must contain a "disclaimer" that meets separate FCC and FEC requirements.

Full service: Stations may charge usual and customary fees for services not related to the sale of time (e.g., production, talent, and distribution charges).

Cash: Stations may require cash up-front for political advertising, including issue advertising, if station policy requires cash up-front for new commercial advertisers.

Paperwork: Stations must document and make publicly available all requests and contracts for political advertising by anyone who wants to buy time for or against any candidate or on an issue of national importance. Separate FCC and FEC requirements apply.

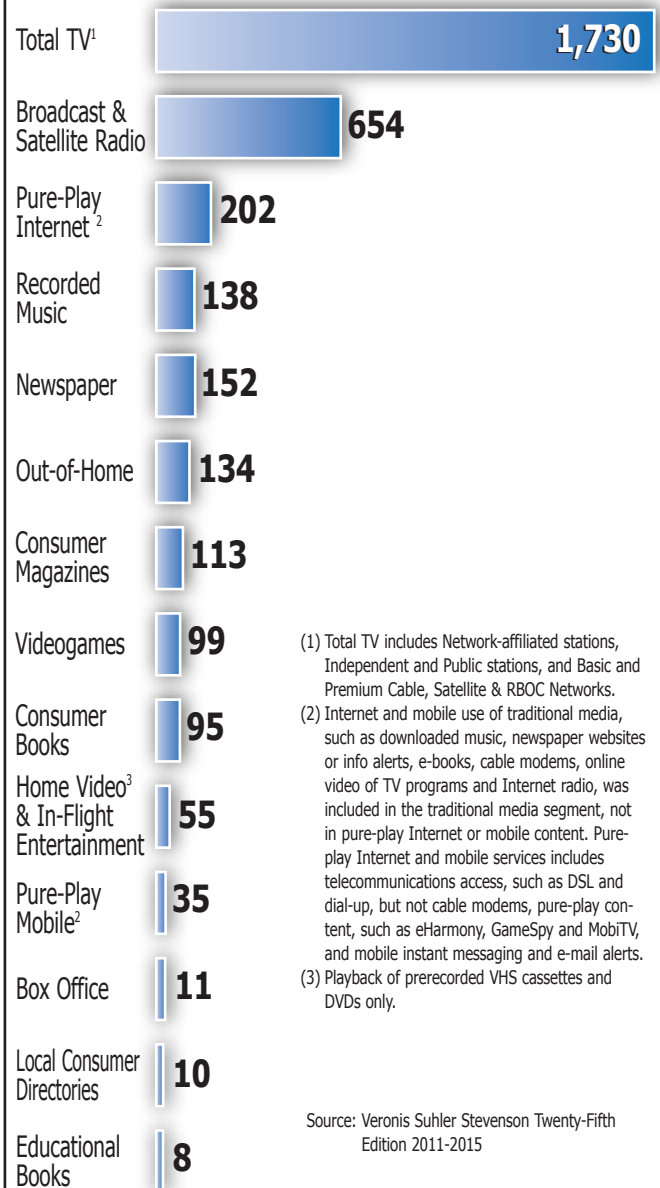
Few areas of federal regulation are more arcane and complex than broadcast political advertising. TVB's desk reference, "Political Advertising Handbook For The Television Sales Executive," treats the subject in greater depth, and is available online, for TVB members only at www.tvb.org. Counsel should be consulted in a specific case.

Source: Erwin G. Krasnow, John Wells King, of Garvey Schubert Barer

Consumer Media Usage

Today, more and more media are competing for people's time. Television remains the clear winner, more than doubling the No. 2 medium, Broadcast & Satellite Radio.

Hours Per Person Per Year Using Consumer Media – 2010



Geographic Targeting Delivers Customers

There's never enough money to advertise everywhere you want for as long as you want. Which is why the media planner's basic task is allocation. That is, spending a limited resource for greatest total effect in getting people to buy the product.

It is the events in a person's life – the empty cereal box, the high telephone bill, the broken dishwasher, the expiring car lease – that trigger consumers to consider making a purchase. Most brand advertising does its job by being there with a message for the consumer who is ready to buy the product.

Thus, for most established brands, advertising has its greatest effect when a consumer is "in the market." For that reason, **when**

a person gets a message is often more important than how many messages a person gets. And because products are bought every day, brands need to remind people of their name and value every day.

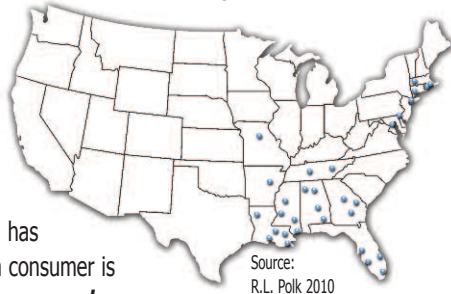
This is an argument for more weeks of advertising...continuous presence, in other words, not just frequency. These new ideas can be summed up in the phrase: recency planning.

Since purchases are made continuously, but we usually don't know who is ready to purchase, the idea is to talk to as many target consumers as possible. **For most established brands today, the goal is "reach and continuity," not "reach and frequency."** In other words, it's much more important to reach a potential customer when s/he is interested in making a purchase than to reach every viewer three times or more. And to do that it is necessary to advertise consistently over time. That's called recency.

Advertising does many things. Over time, it builds brand awareness in the target market which in turn makes it easier to influence the next purchase. Recency's real contribution to advertising is to focus on that next purchase – whether the brand is new or established, cornflakes or cars.

Nissan Maxima

For this sedan, the 31 high-indexing DMAs contained 25.7% of the U.S. population, but delivered over 51.4% of all new Nissan Maxima registrations in 1Q'10.



Both weeks and weekly reach are key recency goals.

Unfortunately, most advertisers can't afford both. The traditional trade-offs for buying more weeks – scheduling fewer rating points, using 15s instead of 30s, and maximizing lower-priced programs – have been pushed to the limit. The remaining option is to focus on geography, not demography.

Concentrating solely on demography produces targeting errors.

There are two kinds: "false positives" where the demo is not the target and "false negatives" where the target is not the demo.

False positive errors waste money. A high percentage of demo exposures are delivered to non-prospects. False negative errors distort GRPs and reach – a significant percentage of prospects are not in the GRP or reach calculations.

And there is no way to reduce the error when using demo targets. A larger demo, for example, merely increases false positives – it includes more people who are not the target. A narrower demo increases false negatives – it excludes more people who are the target.

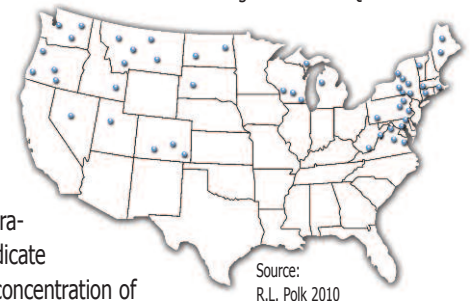
Using geography, however, reduces targeting error by focusing on high response areas. That's why geo-targeting is so important.

Every brand has geographic areas of opportunity. These are spot markets where advertising is most likely to produce sales.

For most brands, markets comprising a third of the U.S. will have a BDI of 125 or higher. For example, on these pages, the high-indexing DMAs shown delivered approximately half of each model's new registrations. (The blue dots indicate DMAs with the highest concentration of purchasers relative to the national average.)

Subaru Outback

For this sedan, the 52 high-indexing DMAs contained 23.5% of the U.S. population, but delivered 50.6% of all new Subaru Outback registrations in 1Q'10.



Geography combined with demography is the optimum formula for reaching high-potential consumers. This is the great strength of Spot TV.

Top 25 African-American Markets

In total, the top 25 African-American DMAs contain 61% of all African-American TV households in the U.S. New York tops the list, with 1.28 million African-American households, followed by Atlanta, Chicago, Washington, DC and Philadelphia.

DMA Rank*	Rank	Market (DMA)	DMA % of Total U.S.		
			A-A TV HH	A-A TV HH	Cumulative % Total U.S. A-A TV HH
1	1	New York	1,276,790	8.9	8.9
2	9	Atlanta	683,870	4.8	13.7
3	3	Chicago	589,960	4.1	17.9
4	8	Washington, DC (Hagrstwn)	570,530	4.0	21.9
5	4	Philadelphia	554,480	3.9	25.7
6	2	Los Angeles	460,330	3.2	29.0
7	5	Dallas-Ft. Worth	396,940	2.8	31.7
8	10	Houston	395,760	2.8	34.5
9	11	Detroit	379,080	2.7	37.2
10	16	Miami-Ft. Lauderdale	325,140	2.3	39.5
11	24	Raleigh-Durham (Fayetteville)	309,720	2.2	41.6
12	27	Baltimore	299,160	2.1	43.7
13	49	Memphis	266,320	1.9	45.6
14	43	Norfolk-Portsmouth-Newport News	218,700	1.5	47.1
15	25	Charlotte	217,790	1.5	48.6
16	18	Cleveland-Akron (Canton)	217,460	1.5	50.2
17	21	St. Louis	197,660	1.4	51.5
18	19	Orlando-Daytona Beach-Melbourne	188,330	1.3	52.9
19	39	Birmingham (Anniston and Tuscaloosa)	178,860	1.3	54.1
20	52	New Orleans	178,660	1.3	55.4
21	14	Tampa-St. Petersburg (Sarasota)	176,490	1.2	56.6
22	6	San Francisco-Oakland-San Jose	175,670	1.2	57.8
23	57	Richmond-Petersburg	160,610	1.1	59.0
24	93	Jackson, MS	149,060	1.0	60.0
25	7	Boston (Manchester)	147,540	1.0	61.0

Source: The Nielsen Company, NSI, Jan., 2012

*Ranked by A-A TV Households

Top 25 Hispanic Markets

In total, the top 25 Hispanic DMAs contain 74% of all Hispanic TV households in the U.S. Los Angeles tops the list, with 1,876,110 Hispanic TV households, followed by New York's 1,345,140. Miami, Houston & Chicago round out the top five Hispanic DMAs; together these five markets contain over 36% of all Hispanic TV households.

DMA Rank*	Rank	Market (DMA)	DMA % of Total U.S.		
			Hispanic TV HH	Hispanic TV HH	Cumulative % Total U.S. Hispanic TV HH
1	2	Los Angeles	1,876,110	13.4	13.4
2	1	New York	1,345,140	9.6	23.1
3	16	Miami-Ft. Lauderdale	730,160	5.2	28.3
4	10	Houston	607,290	4.4	32.7
5	3	Chicago	511,680	3.7	36.3
6	5	Dallas-Ft. Worth	504,610	3.6	39.9
7	36	San Antonio	422,860	3.0	43.0
8	6	San Francisco-Oakland-San Jose	414,730	3.0	45.9
9	13	Phoenix (Prescott)	350,450	2.5	48.5
10	87	Harlingen-Weslaco-Brownsville-McAllen	308,050	2.2	50.7
11	20	Sacramento-Stokton-Modesto	281,740	2.0	52.7
12	45	Albuquerque-Santa Fe	266,650	1.9	54.6
13	28	San Diego	254,650	1.8	56.4
14	55	Fresno-Visalia	254,270	1.8	58.2
15	91	El Paso (Las Cruces)	243,720	1.7	60.0
16	17	Denver	237,280	1.7	61.7
17	4	Philadelphia	232,150	1.7	63.3
18	19	Orlando-Daytona Beach-Melbourne	225,860	1.6	65.0
19	8	Washington, DC (Hagrstwn)	216,470	1.6	66.5
20	14	Tampa-St. Pete (Sarasota)	213,590	1.5	68.0
21	9	Atlanta	165,080	1.2	69.2
22	47	Austin	163,150	1.2	70.4
23	40	Las Vegas	157,390	1.1	71.5
24	7	Boston (Manchester)	153,020	1.1	72.6
25	70	Tucson (Sierra Vista)	124,840	0.9	73.5

Source: The Nielsen Company, NSI, Jan., 2012

*Ranked by Hispanic TV Households

Top 25 Asian Markets

In total, the top 25 Asian DMAs contain 79% of all Asian TV households in the U.S. Los Angeles tops the list, with 749,610 Asian TV households, followed by New York's 668,540. San-Francisco-Oakland-San Jose, Honolulu and Chicago round out the top five Asian DMAs; together these five markets contain over 45% of all Asian TV households.

DMA Rank*	Rank	Market (DMA)	Asian TV HH	DMA % of Total U.S. Asian TV HH	Cumulative % Total U.S. Asian TV HH
1	2	Los Angeles	749,610	14.2	14.2
2	1	New York	668,540	12.7	26.9
3	6	San Francisco-Oak-San Jose	560,810	10.6	37.5
4	71	Honolulu	214,860	4.1	41.6
5	3	Chicago	196,830	3.7	45.3
6	8	Washington, DC (Hagrstwn)	189,390	3.6	48.9
7	12	Seattle-Tacoma	161,580	3.1	52.0
8	20	Sacramnto-Stkton-Modesto	145,280	2.8	54.7
9	10	Houston	141,640	2.7	57.4
10	4	Philadelphia	135,350	2.6	60.0
11	5	Dallas-Ft. Worth	131,210	2.5	62.5
12	7	Boston (Manchester)	120,260	2.3	64.8
13	28	San Diego	112,560	2.1	66.9
14	9	Atlanta	94,800	1.8	68.7
15	40	Las Vegas	70,390	1.3	70.0
16	11	Detroit	64,340	1.2	71.3
17	13	Phoenix (Prescott)	59,930	1.1	72.4
18	15	Minneapolis-St. Paul	58,940	1.1	73.5
19	22	Portland, OR	52,310	1.0	74.5
20	27	Baltimore	47,580	0.9	75.4
21	17	Denver	46,500	0.9	76.3
22	19	Orlando-Daytona Bch-Melbrn	45,000	0.9	77.1
23	14	Tampa-St. Pete (Sarasota)	41,490	0.8	77.9
24	16	Miami-Ft. Lauderdale	40,810	0.8	78.7
25	55	Fresno-Visalia	36,840	0.7	79.4

Source: The Nielsen Company, NSI, Jan., 2012 *Ranked by Asian TV Households

Ethnic Buying Power

Hispanic, African-American and Asian target markets have made substantial gains in buying power* over the last decade. Each of these consumer groups have out-paced the total U.S. buying power growth rate since 1990.

Buying Power (billions of dollars)				
	1990	2000	2009	2014
African-American	318.1	590.2	910.4	1,136.8
Hispanic	211.9	489.4	978.4	1,330.4
Asian-American	116.5	268.7	508.6	696.5
Total	4,270.5	7,187.6	10,717.8	13,097.1

Percentage Change in Buying Power				
	1990-2009	1990-2014	2000-2009	2009-2014
African-American	186.2	257.3	54.3	24.9
Hispanic	361.8	528.0	99.9	36.0
Asian-American	336.6	497.9	89.3	36.9
Total	151.0	206.7	49.1	22.2

In 2014, African-Americans will account for 8.7% of all U.S. buying power, up from 7.4% in 1990.

Compared to the total U.S., African-Americans spend more on:

- Telephone Services
- Electricity
- Groceries
- Natural Gas

In 2014, Hispanics will account for 10.2% of all U.S. buying power, up from 5.0% in 1990.

Compared to the Total U.S., Hispanics spend more on:

- Groceries
- Telephone Services
- Housing
- Clothing

In 2014, Asians will account for 5.3% of all U.S. buying power, up from 2.7% in 1990.

Compared to the average U.S. household, Asians spend more on:

- Food
- Housing
- Furniture
- Vehicle Purchases

* Total personal income available after taxes for spending on goods and services (same as disposable personal income).

Source: University of Georgia Selig Center for Economic Growth, "The Multicultural Economy 2009," Third Quarter 2009. Economic research from the Terry School of Business at the University of Georgia is published every quarter and their estimates in part are based on data from the U.S. Bureau of Economic Analysis.

Ethnic Buying Power

Top States for African-American Buying Power: The ten largest African-American states account for 61% of the African-American buying power.

Rank	State	Totals in Billions of Dollars
1	New York	86
2	Texas	72
3	California	62
4	Georgia	61
5	Florida	61
6	Maryland	52
7	Illinois	45
8	North Carolina	41
9	Virginia	38
10	New Jersey	35

Top States for Hispanic Buying Power: The ten states with the largest Hispanic markets account for 80% of the Hispanic buying power.

Rank	State	Totals in Billions of Dollars
1	California	253
2	Texas	175
3	Florida	101
4	New York	76
5	Illinois	43
6	New Jersey	37
7	Arizona	31
8	Colorado	21
9	New Mexico	18
10	Georgia	15

Top States for Asian Buying Power: The ten states with the largest Asian markets account for 75% of the Asian buying power.

Rank	State	Totals in Billions of Dollars
1	California	163
2	New York	51
3	Texas	34
4	New Jersey	32
5	Illinois	23
6	Hawaii	22
7	Washington	17
8	Florida	15
9	Virginia	15
10	Massachusetts	13

Source: University of Georgia Selig Center for Economic Growth, "The Multicultural Economy 2009," Third Quarter 2009

Local News Delivers Quality Viewers

In every local broadcast market, there are opportunities to reach targeted consumers via programs that cater to local market nuances. Here are some examples of the different types of goods and services that over-index among news viewers in five DMAs.

Category	Index of News Viewers against Total Market (Adults 18+)
Albuquerque, NM (Morning Local News)	
Plan to buy a Smartphone in the next 12 months	162
Plan to purchase a pool/hot tub/home spa in the next 12 months	150
Went to a live show at a casino in the past year	142
Planning to buy a home security system in the next 12 months	141
Made an addition to home in the past year	131
Las Vegas, NV (Late Local News)	
Business decision maker for overnight delivery services	204
Plan to buy a pool/hot tub/home spa in the next 12 months	195
Plan to purchase a computer in the next 12 months	157
Plan to purchase a digital computer in the next 12 months	136
Plan to purchase a smoking cessation product in the next 12 months	133
Rochester, NY (Morning Local News)	
Consulted with a plastic/cosmetic surgeon in the past 12 months	170
Purchased arthritis medication in the past 12 months	134
Used services of an attorney in the past 12 months	124
Purchased medication for high blood pressure in the past 12 months	117
Purchased medication for a digestive disorder in the past 12 months	117
San Francisco, CA (Late Local News)	
Plan to purchase an eReader device in the next 12 months	200
Purchased medication for migraines in the past year	150
Plan to purchase an energy saving appliance in the next 12 months	139
Plan to purchase a major appliance in the next 12 months	127
Took medication for weight loss in the past year	124

Example: In Albuquerque, viewers of morning local broadcast news are 62% more likely than all Albuquerque adults to be planning to buy a Smartphone in the next 12 months.

Note: All M-F local broadcast affiliates and independent news programs are included in the news viewer definitions.

Source: Scarborough Research, 2009 Release 1
(Apr 2009 - Mar 2010 Alb & LV; Feb 2009-Jan 2010 Rochester & SF)

Sales Distinctions by DMA

No goods or services sold in the U.S. have equal distribution throughout all 210 television markets. Some may have flatter patterns than others, but there are always market variations based on consumer lifestyles and interests.

Listed below are examples of television markets that have above average indices in three selected sales categories. Spot TV enables advertisers to target high indexing markets for greater ROI.

DMA	2009 DMA Rank	CDI
Gourmet Cooking/Fine Foods		
San Francisco, CA	6	132
New York, NY	1	124
Miami, FL	16	121
Las Vegas, NV	38	120
Washington DC	9	119
Casino Gambling		
San Francisco, CA	6	113
Miami, FL	16	112
Honolulu, HI	62	110
Baltimore, MD	27	109
Chicago, IL	3	108
Fashion Clothing		
San Francisco, CA	6	122
New York, NY	1	121
Las Vegas, NV	38	118
Washington, DC	9	117
Miami, FL	16	116

Notes: CDI, or Category Development Index, is derived by dividing a market's percentage of U.S. sales for a category by the market's percentage of U.S. population.

Source: SRDS Local Market Audience Analyst 2009; DMA Rank based on Nielsen DMA Rank, September 2009.



Research 101 – Television Markets

DMA (Designated Market Area)

A Nielsen term used to identify an exclusive geographic area of counties in which the home market television stations hold a dominance of total hours viewed. Each county in the U.S. is assigned to only one of the 210 DMAs.

Universe Estimate (U.E.)

Total persons or homes in a given population, e.g., TV households in the U.S. or in a specific DMA.

Metered Markets

DMAs in which household viewing is measured by set-tuning meters in one panel of households, while demographic viewing is collected via diaries from a separate sample. Household viewing data is reported on an overnight basis.

Local People Meter Markets (LPM)

Local markets with the same metering device used for national Nielsen data. The People Meter measures TV set-tuning and demographic data on a 52-week basis, eliminating the need for diaries.

Diary Markets

DMA viewing for both set-tuning and demographics is recorded in a paper television viewing diary. Diary markets are measured only during the "sweep" months. Demographics for metered markets are also obtained with diaries.

Cable Television Terms

Coverage Area

The number or percentage of TV households that could receive an individual cable channel or program. Coverage reflects the ability to view, not actual viewing.

Wired Cable Homes

The household is "wired" for cable via a wire to the home from a cable head-end located in the community, and can receive cable channels on any connected TV set in the home.

Alternate Delivery Source (ADS)

Technologies for the delivery of cable channels that are alternatives to a wire going into the home: satellite dish (C-Band), Direct Broadcast Satellite (DBS), Satellite Master Antenna (SMATV) and Microwave Multi Distribution System (MMDS).

Research 101 – Media Terminology & Formulas

Rating

The audience of a particular program or network at a specific period of time expressed as a percent of the total audience population or universe.

For example, in a typical large DMA, a 12 NSI household rating would equal delivery of 885,160 HH or 12% of a HH universe of 7,376,330.

If a program has a 12 national (NTI) household rating, and the U.S. TV household universe is 114.5 million, then 12% of 114,500,000, or 13,740,000 households, are tuned to the program.

FORMULA

Share (%) x HUT (%) = Rating

Audience (000's) / Universe Estimate (000's) = Rating

Share

The percent of the Households Using Television (HUT) or Persons Using TV (PUT) which are tuned to a specific program or station at a specified time.

For example, a 12 household rating divided by a television usage level (HUT) of 60 would yield a share of 20.

FORMULA

Rating (%) / HUT or PUT (%) = Share

Note: Share is a percent of the viewing audience available during a specific time period. A rating is a percent of the universe estimate.

HUT (Homes Using Television)

The percent of all TV households with one or more sets in use during a specific time period. When this term applies to people, it is called Persons Using Television (PUT).

For example, HUTs in prime time are generally in the 60-65% range while 7AM-9AM could be about 30-35%.

FORMULA

Rating (%) / Share (%) = HUT

HH with TV sets on (000's) / Total HH Universe (000's) = HUT

Research 101 – Media Terminology & Formulas

Audience Composition

The percent that a specific demographic segment is of a larger demo segment. Usually calculated using either Persons 2+ or Adults 18+ as the base, it can be calculated using either impressions or VPVHs.

FORMULA

$$A25-54 (000) / A18+ (000) =$$

The A25-54 % audience composition of Total Adults

Cost Per Thousand (CPM)

Advertisers' cost to deliver one thousand viewer exposures to a commercial. The total cost for one or a series of commercials is divided by the projected audience in thousands.

For example, if the cost of a commercial is \$50,000 and the projected audience is 4,606,000, then the CPM equals \$10.86 (\$50,000/4,606).

FORMULA

$$\text{Media cost} / \text{Impressions in thousands} = \text{CPM}$$

Cost Per Rating Point (CPP)

An advertising cost to deliver a single rating point. CPP is calculated by dividing the cost of running a commercial by the size of the audience, expressed in rating points.

For example, if the cost is \$50,000 and the rating for a program is 12, then the cost per point is \$4,166.67 (\$50,000 divided by 12).

FORMULA

$$\text{Average unit cost} / \text{Rating (\%)} = \text{CPP}$$

$$\text{Total schedule cost} / \text{GRPs} = \text{CPP}$$

Viewers Per Viewing Household (VPVH)

The number of viewing persons per tuning household. Usually reported as "per 1,000 viewing households." VPVH is not a percentage, it is a ratio of a demographic segment to households and represents an actual number of people.

For example, if there are 13.5 million households tuned to a program and the Women 18-49 VPVH is .43, then there are .43 W18-49 in each of these 13.5 million households.

FORMULA

$$\text{Persons Projection} / \text{Household Projection} = \text{VPVH}$$

Research 101 – Media Terminology & Formulas

Reach

The number of different individuals or households exposed at least once to a program or commercial across a stated period of time. It is expressed as a percentage of a given universe. A household or person is counted once, no matter how many times the telecast has been viewed. Also called cumulative or unduplicated audience.

FORMULA

$$\text{GRPs (\%)} / \text{Frequency} = \text{Reach}$$

Frequency

Average number of times a household or person viewed a given television program, station or commercial during a specific time period. For instance, a schedule of 150 GRPs divided by the percent of homes reached (70%) would deliver a frequency of 2.1.

FORMULA

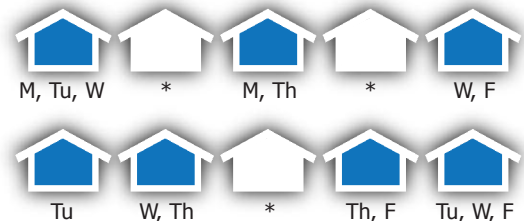
$$\text{GRPs (\%)} / \text{Reach (\%)} = \text{Frequency}$$

Reach & Frequency Example

Schedule = 150 GRPs

Total DMA Households = 10

Channel 2 HH News Viewing (M-F 6-7PM) = 7 out of a 10 HH universe



*Household had no viewing to Channel 2 News

In this example, Ch. 2 News reach is 7 HH out of the DMA universe of 10 HH, or 70%. Frequency is calculated by dividing the 150 GRPs by the 70% reach, yielding an average 2.1 frequency.

Each household exposure to the commercial is counted in the GRP total, but any duplication of viewing by the same household is eliminated in the reach calculation because each household is counted only once. Commercial XYZ has been seen in 7 out of 10 households an average of 2.1 times.

Television Acronyms

Various industries all have their own unique language or nomenclature and the television advertising business is no exception. Listed below are some of the common acronyms that are used and what they stand for, followed by useful terms and definitions.

AAAA	American Association of Advertising Agencies
AAF	American Advertising Federation
ADS	Alternate Delivery Systems
AFTRA	American Federation of Television and Radio Artists
AMOL	Automated Measurement of Lineups
ANA	Association of National Advertisers
ARF	Advertising Research Foundation
AWRT	American Women in Radio and Television
BDI	Brand Development Index
CATV	Cable Television
CC	Closed Captioned
CDI	Category Development Index
CNAD	Cable National Audience Demographics Report
COLTAM	Committee on Local Television Audience Measurement
COLTRAM	Committee on Local Television and Radio Audience Measurement
CPM	Cost Per Thousand
CPP	Cost-Per-Rating Point
DBS	Direct Broadcast Satellite
DMA	Designated Market Area
DTV	Digital TV
DVD	Digital Versatile Disk
DVR	Digital Video Recorder
EBS	Emergency Broadcast System
EDI	Electronic Data Interchange
FCC	Federal Communications Commission
FTC	Federal Trade Commission
GAA	Gross Average Audience
GRP	Gross Rating Point
HDTV	High Definition Television
HUT	Households Using Television
IRTS	International Radio & Television Society Inc.
LCD	Liquid Crystal Display
LMA	Local Marketing Agreement
LPM	Local People Meter
LPTV	Low Power TV Station
MMDS	Multi-channel Multi-point Distribution System
MSO	Multi-System Operator
MVPD	Multichannel Video Programming Distributor

NAB	National Association of Broadcasters
NAD	National Audience Demographics Report
NATPE	National Association of Television Program Executives
NSI	Nielsen Station Index
NTI	Nielsen Television Index
OTO	One Time Only
PBS	Public Broadcasting Service
PPM	Personal People Meter
PPV	Pay-Per-View
PSA	Public Service Announcement
PUT	Persons Using Television
ROI	Return on Investment
ROS	Run-Of-Schedule
ROSP	Report on Syndicated Programs
SDTV	Standard Definition Television
SMATV	Satellite Master Antenna Television
STB	Set-Top Box
TSA	Total Survey Area
UE	Universe Estimate
UHF	Ultra High Frequency
VHF	Very High Frequency
ViP	Viewers in Profile
VOD	Video On-Demand
VPVH	Viewers Per Viewing Household

Glossary of Television Terms

A

Ad Hoc Network

A group of stations that is formed for a special purpose, such as the showing of a one-time TV program or series. Ad hoc is Latin for "for this."

Adjacency

A commercial or program that immediately follows or precedes another on the same TV station.

Advertising Weight

A measure of advertising delivery, normally stated in terms of number of commercials, homes reached, target audience impressions, and gross rating points.

Affidavit

A notarized statement from a television station that confirms the commercial actually ran at the time shown on the station's invoice.

Affiliate

A TV station, not owned by a network, that grants a network use of specific time periods for network programs and advertising, often for compensation. Remainder of broadcast day is programmed locally.

Alternate Delivery Systems (ADS)

TV homes with unwired cable access are referred to as having Alternate Delivery Systems. The four components of ADS are:

- Direct Broadcast Satellite (DBS): Programming delivered directly via household's own small (usually 18") dish; DBS is the largest component of ADS.
- Satellite Master Antenna (SMATV): Serves housing complexes and hotels; signals received via satellite and distributed by coaxial cable.
- Microwave Multi Distribution System (MMDS), "Wireless Cable": Distributes signals by microwave. Home receiver picks up signal, then distributes via internal wiring.
- Satellite Dish (C-Band/KU Band), "Big Dish": Household receives transmissions from a satellite(s), via a 1- to 3- meter dish.

Audience Composition

The distribution of a station's audiences by demographic group.

Audience Duplication

The extent to which the audience of one station is exposed to that of another.

Audience Flow

A measure of the change in audience during and between programs. Audience flow shows the percentages of people or households who turn on or off a program, switch to or from another channel, or remain on the same channel as the previous program.

Automated Measurement of Lineups (AMOL)

The technology which allows The Nielsen Company to track an identification code within locally transmitted TV signals for network and nationally syndicated programs. Nielsen is also linked by computers to networks and syndicators in order to receive their latest schedule changes. Using this technology, Nielsen can pin down exactly what program was shown on what channel at a particular time.

Average Audience (AA)

A widely used rating term, expressed as a percentage, to reflect viewing to the average minute of a program or time period. It is an average of the audience at minute 1, 2, 3, etc. As such, it serves as an estimate of the average commercial audience (households or persons).

Average Quarter-Hour Audience

Estimated number of people who watch a program or station for a minimum of five minutes within a specific quarter hour.

B

Back Channel

A means of communication from users to content providers. As content providers are transmitting interactive television (analog or digital) to users, users can connect through a back channel to a website. It can be used to provide feedback, purchase goods and services, etc.

Barter

The exchange of quantities of commercial time for merchandise or services.

Barter Syndication

A program distribution method in which the syndicator retains and sells a portion of the show's advertising time. In "cash plus barter," the syndicator also receives some money from the station on which the program airs.

Basic Cable

Channels received by cable subscribers at no extra charge, usually supported by advertising and small per-subscriber fees paid by cable operators.

Billboard

A brief announcement, usually 3, 5 or 10 seconds in length, and usually earned by advertisers paying extra for the program being ordered. Billboards are afforded, in most instances, at the top and bottom (beginning and end) of the show. The product and/or sponsor's name is mentioned in a statement such as "...the following portion of (program) is being brought to you by (sponsor)..." Also, called OPEN when used at the top of a show, and CLOSE when used at the bottom of a show.

Brand Development Index (BDI)

A measure of the relationship of a specific brand's sales to population in a specific geographic area. The BDI is derived by dividing an area's percent of total U.S. sales by that area's percent of population.

Broadband Services

High-speed cable Internet, digital cable and digital phone services all through a single pipeline.

Broadcast Calendar

The standard Broadcast calendar, created in the 1960s, is designed to conform to the uniform billing period adopted by broadcasters, agencies and advertisers for billing and planning functions. Under this system, the standard week starts on Monday and ends on Sunday. The standard Broadcast billing month always ends on the last Sunday of the calendar month.

Broadcast Coverage Area

The geographic area that receives a signal from an originating TV station.

C

Cable Television (Cable TV or CATV)

A television distribution system whereby TV signals are transmitted via cable (insulated wire), rather than through the air, to subscribers in a community or locality. Cable television systems are generally called cable systems; the companies that own and operate them are known as cable system operators or cablecasters.

Category Development Index (CDI)

A measure of the relationship of a specific category's sales to population in a specific geographic area. The CDI is derived by dividing an area's percent of total U.S. sales by that area's percent of population. Comparing BDI and CDI can be helpful in gauging brand or category potential.

Clutter

Excessive amounts of advertising carried by media vehicles. Term refers to the total amount of advertising time and space and to its scheduling long strings of consecutive commercials for broadcasting.

Confirmation

A statement (verbal or written) given to advertising agencies by a network, station, or rep firm when accepting an order for a commercial and/or media schedule.

Continuity

Scheduling advertising consistently over a period of time without interruption in order to build or maintain advertising awareness and recall.

Co-op Advertising

TV advertising paid for jointly by a manufacturer and retailer.

Cost-Per-Rating Point (CPP)

Used by most media planners in developing and allocating market budgets and setting rating point goals. It is defined as the cost of reaching one percent of the target audience within a specified geographic area.

$$\frac{\text{Average Cost per Spot}}{\text{Average Rating Point per Spot}} \quad \text{OR} \quad \frac{\text{Cost of Schedule}}{\text{Gross Rating Points}}$$

Cost Per Thousand (CPM)

The cost of reaching 1,000 homes or individuals with a specific advertising message. CPM is a standard advertising measure to compare the relative cost efficiency of different programs, stations, or media.

Coverage

The percentage of homes or persons receiving a particular broadcast signal within a specific geographic area.

Cumulative Audience (CUME)

It is the total non-duplicated audience for one or a series of telecasts, programs, messages, or time-periods. It is expressed as a percentage of a given universe. A household or person is counted once no matter how many times the telecast has been viewed. This also is known as reach, net unduplicated audience, or net reach.

**Datacasting**

The broadcast of information and other services using a digital television channel. Broadcasters can offer additional related information while a program is being viewed.

Dayparts

The time segments that divide the TV day for ad scheduling purposes. These segments generally reflect a television station's programming patterns. Comparison of audience estimates between dayparts may indicate differences in size and composition of available audience. While dayparts may vary by market, station and affiliation, the most common dayparts* are:

...Dayparts continued

Early morning	5:00am-9:00am	Prime M-Sat	8:00pm-11:00pm
Daytime	9:00am-3:00pm	Sun	7:00pm-11:00pm
Early fringe	3:00pm-5:00pm	Late news	11:00pm-11:30pm
Early news	5:00pm-7:00pm	Late fringe	11:30pm-2:00am
Prime access	7:00pm-8:00pm	Overnight	2:00am-5:00am

*Eastern Time

Decoder

An electronic device used for converting a scrambled TV signal into a viewable picture.

Demographics

Audience composition based on various socioeconomic characteristics such as age, sex, income, education, household size, occupation, etc.

Designated Market Area (DMA)

Represents an exclusive geographic area of counties in which the home market stations are estimated to have the largest quarter-hour audience share (as defined by Nielsen).

Digital Television (DTV)

Generic term that refers to all digital television formats, including high-definition television (HDTV) and standard-definition television (SDTV).

Digital Video Recorder (DVR)

Refers to "digital video recorder," also known as "personal video recorder." A DVR or PVR records broadcasts on a hard disk drive which can then be played back at a later time (this is known as "time shifting"). A DVR often enables smart programming, in which the device records an entire series or programming defined by keywords, genre, or personnel; and offers pause control over "live" broadcasts.

Discrepancy

A difference between station billing and the original order; requires a discussion between the buyer and the station before the invoice is paid.

Direct Broadcast Satellite (DBS)

A television technology that delivers signals directly from a satellite to a home through the use of a small (usually 18") dish.

Direct Response

Advertising that seeks direct and prompt response from the viewer by means of exhibiting telephone numbers, box numbers, or other means of getting the viewer to order or inquire about objects shown.

Drop-In Ad

A local commercial inserted into a national program, or, more generally, an advertising message inserted into a larger advertisement, as for a local dealer or retailer, or a phrase, such as a public service slogan, or symbol; also called a hitch-hike ad.

Duopoly

An instance where two stations in the same designated market area are owned by the same party. Though once forbidden by the FCC, the rules surrounding duopolies have been relaxed in recent years.

E

Electronic Data Interchange (EDI) See definition under eBusiness.

Efficiency

The relationship of media cost to audience delivery.

eBusiness

The transfer of data from one computer to another. When computers connect, trading partners can conduct business transactions electronically. eBusiness promises a more efficient procedure for processing Spot TV buys electronically.

Equal Time

The FCC's Equal Opportunities Rule (part of Section 315 of the Communications Act) states that if a broadcast station or cable system gives or sells time to one candidate for public office, it must offer equivalent time to other candidates. News shows are exempt.

Exposure

A person's physical contact with an advertising medium or message. It can be in a visual and/or an audio form.

F**Flight**

A scheduling tactic that alternates periods of advertising with periods of no activity.

Fragmentation (Audience)

The increasing number of audience subdivisions which, together, constitute total TV usage. Television audiences are said to be fragmented, for example, across a broad spectrum of video sources: multiple broadcast networks, cable networks, syndicated programs, DBS services, VCR and video game usage, Internet usage, etc.

Frequency

The average number of times an accumulated audience has the opportunity to be exposed to advertisements, a particular program, or program schedule, within a measured period of time.

$$\text{Reach} \times \text{Frequency} = \text{Gross Rating Points}$$

G**Geographic Targeting, or Geo-Targeting**

The process of identifying a brand's geographic areas of opportunity, or the markets (DMAs) in which advertising is most likely to produce sales. Geographic targeting combines demographic and sales data to reach high-potential customers. See pages 64-67 for more information.

Gross Rating Points (GRP)

The sum of individual telecast ratings on a total program basis or advertiser commercial schedule, without regard to duplication. For example, 10 announcements each with a 10 rating would produce a total of 100 GRPs.

H**Hiatus**

Period in a campaign when an advertiser's schedule is suspended for a short period of time, after which the schedule resumes.

High Definition Television (HDTV)

One mode of operation of digital TV whereby the broadcaster transmits a wide-screen picture with many times more detail than is contained in current analog television pictures. HDTV has 1125 lines of resolution vs. NTSC signals which have 525 lines of resolution.

Households Using Television (HUT)

The percentage of all television households in a survey area with one or more sets in use during a specific time period.

I**Impressions**

Number of homes or individuals exposed to an advertisement or group of advertisements.

Independent Station

Stations not affiliated with any network, usually refers to commercial stations only.

Infomercial

A television commercial that is similar in appearance to a news program or talk show format, usually 30 minutes in length.

Interactive Television

A combination of television with interactive content. Programming can include richer graphics, one-click access to websites through TV Crossover Links, electronic mail and chats, and online commerce through a back channel.

Interconnect

Two or more cable systems distributing a commercial signal simultaneously, and offering a multiple system buy in which only one contract need be negotiated. Interconnects can be hard, where systems are directly linked by cable, microwave relays or by satellite, and the signal is fed to the entire Interconnect by one head-end; or soft, where there is no direct operational connection between the participating systems.

L**Lead-in**

A program that immediately precedes another program on the same station or network. (Lead-out is the program that immediately follows another program.)

Live Ratings

The Nielsen Company's term for ratings reported as strictly live with no DVR playback activity.

Live Plus Ratings

The Nielsen Company's term for live ratings plus seven-day DVR playback activity.

Live Plus Same Day Ratings (Same Day Ratings)

The Nielsen Company's term for live ratings plus DVR playback activity until 3:00 am of the same Nielsen day.

Local Marketing Agreement (LMA)

An agreement between two owners in which one markets and sells advertising for the other.

Local Spot

The advertising purchased in a market and aimed only at the audience in that market (see Spot TV).

M

Make-good

A spot offered by a station in place of a regularly scheduled announcement that did not run or was improperly aired.

Media Mix

The distribution of time and money allocated among TV, radio, print and Internet advertising that makes up the total advertising budget of an advertiser, agency or media buyer.

Metro Area

A U.S. Government definition; the counties that comprise each Standard Metropolitan Statistical Area.

Multichannel Video Programming Distributors (MVPDs)

A multichannel video program distributor is an entity such as a cable operator, a BRS/EBS provider, a direct broadcast satellite service, a television receive-only satellite program distributor, or a satellite master antenna television system operator, that makes available for purchase, by subscribers or customers, multiple channels of video programming.

Multicasting

Broadcasting several programs at once via DTV on a single channel. A viewer might be able to receive two programs at the same time, and choose the program preferred.

N

National Spot

A form of broadcast advertising in which national advertisers, through their agency or buying service, select their target markets and stations to fit their marketing needs. The station usually has a contract with a rep firm to represent it to ad agencies (see Spot TV).

Network

A connecting system which allows simultaneous telecasting of a single origination by a number of stations.

NTSC

National television system committee. The organization that developed the analog television standard currently in use in the U.S., Canada, and Japan. Now generally used to refer to that standard. The NTSC standard combines blue, red, and green signals modulated as an AM signal with an FM signal for audio.

O

O&O Station

A television station owned and operated by a national network.

Optimization

Term used for a method of media planning using computer programs that develop the optimum media mix to spend advertising dollars most effectively. These media modeling systems allocate using media audience and cost data for all measured media vehicles plus the brand's requirements in terms of budget, target audience, reach & frequency goals and other factors. Television optimizers identify the combination of programs, dayparts and stations that will optimize reach at the lowest cost.

P

Pay-Per-View TV (PPV)

A system in which payment is made for a single showing of a program. Subscribers of the pay-television company can phone in their "orders" prior to a showing, activate the system – that is, clear the scrambled channel – or press a button to utilize two-way equipment that activates the system.

Pay Television (Pay TV)

Home television programming for which the viewer pays by the program or by the month; also called pay television, subscription television (STV), or toll TV. Pay television includes over-the-air transmission (with scrambled signals) and cable transmission (pay cable).

Penetration

A proportion of households owning televisions or subscribing to cable.

Personal People Meter (PPM)

Arbitron's PPM is a pager-sized device that is worn by consumers throughout the day to automatically detect inaudible codes that radio and television broadcasters and cable networks embed in the audio portion of their programming.

Personal Video Recorder (PVR)

See definition under Digital Video Recorder (DVR).

Persons Using Television (PUT)

A measurement of the total number of people in the target audience who are watching television for five minutes or longer during an average quarter-hour. PUT is generally expressed as a percent.

Piggyback

The back-to-back scheduling of two or more brand commercials of one advertiser in network or spot positions.

Pod

A group of commercials, promos or announcements contained in a television program break.

Post Buy Analysis

An analysis of schedule performance after it runs; offers a means of measuring a media buy as run versus its goal or original estimate of achievement.

Pre-emption

An omission of an announcement from a previously confirmed broadcast schedule; the advertiser is either offered a make-good or takes a credit.

Psychographics

Audience analysis on the basis of psychological factors such as lifestyles, values and interests and how they affect purchase behavior.

**Quarter Hour Audience**

Individuals viewing a station at least five minutes in a specific 15-minute period.

**Rating**

A percentage of total households or population owning TVs who are tuned to a particular program or station at a specific time (e.g., a six rating for women 18-49 means 6 percent of all women 18-49 in the defined geographic area were viewing that station or program).

Rating Point

A value equal to one percent of a population or universe.

Reach

The number of unduplicated households or people exposed to a program, group of programs or an advertiser's schedule over a specific time period.

Reach x Frequency = Gross Rating Points

Rep Firm

Media sales representation company with offices in major advertising centers which represents stations in various markets for national advertising sales.

Rotation

Scheduling of advertising in the same program or time period on different days each week (horizontal rotation) or throughout a particular day (vertical rotation) in order to increase advertising exposure to different prospects.

Run-Of-Schedule (ROS)

Scheduling of commercials at any time of a station's choosing.

Road Blocking

The scheduling of a brand's commercial at approximately the same time on all networks, or all stations in a given market.

**Satellite Station**

A station that has agreed to rebroadcast the transmission of another station (generally operating in a larger nearby market) to an area that cannot otherwise be served by that station.

Saturation

The concentration of a heavy amount of advertising in a short period of time in order to attain maximum reach.

Scatter Plan

Scheduling method where the advertiser's commercials are rotated among a broadly described group of programs and/or time periods.

The advantage is that the advertiser gains a greater net audience (reach); the disadvantage may be that the station may include less attractive spots/commercial units in the schedule.

Schedule

A listing of the time of day and dates an advertiser's commercials are planned to run.

Set-top box (STB)

These receivers (named because they typically sit on top of a television set) convert and display broadcasts from one frequency or type – analog cable, digital cable, or digital television – to a standard frequency (typically channel 3 or 4) for display on a standard analog television set.

Share

The percent of households (or persons) using television who are tuned to a specific program, network, or station at a specific time.

Spill-In

The penetration of a television signal transmitted from outside the market area.

Spill-Out

The transmission of a television signal beyond its own market area.

Sponsorship

The purchase of all or part of a television program by one advertiser.

Spot TV

The advertising time purchased from individual stations. There are two major types: local and national. Local spots are purchased in one market and aimed only at the audience in that particular market. National spots are bought by national advertisers in several markets.

Standard Definition Television (SDTV)

An alternative method of operation for digital television that offers the opportunity to transmit two to eight standard quality programs in place of – but in the same channel as – that used for HDTV. By employing higher compression ratios, more programs may be transmitted.

Standard Error

A measure of the margin of error in a survey result attributable to sampling.

Strip

Refers to a television program aired five days a week, mainly Monday-Friday.

Subscription Television

See definition under Multichannel Video Programming Distributors.

Superstation

A station that provides satellite transmission of its signal to cable systems throughout the country. The extended coverage allows the superstation to claim increased viewership.

Sweeps

Ratings surveys in which local markets are simultaneously measured by a rating service (see page 46).

Syndicated Program

A program that is produced for national distribution, but which is shown on individual local stations rather than on a national network is called a syndicated program. These programs may be sponsored either locally or nationally.

T**Target Audience**

The audience most desired by advertisers in terms of potential product/service usage and revenue potential.

Television Households

An estimate of the number of households that have one or more television sets.

Total Audience

Percent of households tuning to all or to any portion of a program for at least 6 minutes.

Total Survey Area (TSA)

A geographic area term; includes metro area and any additional counties where a statistically significant amount of viewing can be attributed to stations originating in the metro area. These outlying counties may well be a part of an adjacent metro area or DMA.

U**Ultra High Frequency (UHF)**

An area of the broadcast spectrum that carries television signals for stations with channels 14 through 83.

Universe Estimate (UE)

The population chosen for a research study. The estimated number of actual households or people from which the sample will be taken and to which data will be projected.

Upfront

The first selling wave for the broadcast or cable networks, and syndication. It usually occurs in the spring after the new fall schedules have been announced and presented to major advertisers. The commercial time not sold in the upfront is sold later in the season in the scatter market.

U**Very High Frequency (VHF)**

An area of the broadcast spectrum that carries television signals for stations with channels 2 through 13.

Video On-Demand (VOD)

Allows VCR-type control of broadcast or cable programs, or video and movies offered on a PPV basis.

Viewers Per Viewing Household (VPVH)

The number of viewing persons per tuning household; usually reported as "per 1000 viewing households."

ViP (Viewers in Profile)

The local television ratings book from The Nielsen Company, issued after sweeps periods for each of the 210 television markets in the U.S. (see page 46).

W**Weighted Average**

A statistical quantity calculated by multiplying each value in a group by an assigned weight, summing these products and dividing the total by the sum of the weights.

Wraparound Commercial

A commercial with noncommercial material wrapped around it, such as a question about a past sports event at the beginning and the answer at the end; sometimes called an insert, as when it is inserted within a movie surrounded by questions about the movie.

Glossary of Multiplatform Terms

A

Ad Server

A system used to determine which ads to serve based on the priority of an ad. It is also responsible for pacing the campaign, tracking and reporting on impression delivery and click-thru rates.

Atlas

An ad server used by advertisers and agencies to create and track ads.

B

Banner

In the ad industry, this is generally associated with the 468x60 size ad.

Blog

Blog is short for weblog. A journal (or newsletter) that is frequently updated and intended for general public consumption. Generally representative of the personality of the author or the website.

Bluetooth

Bluetooth is a computing and telecommunications industry specification that describes how mobile phones, computers and PDAs can easily interconnect with each other and with home and business phones and computers using a short wireless connection.

C

Click Command

A unique URL placed in front of a "raw" URL, which enables the system that created it to track the click activity.

Compression

The process of reducing the size of a media file by eliminating data. Higher compression means that the compression utility defines greater amounts of data as redundant. This can lead to loss of image quality, but highly compressed images can be delivered more efficiently over a network.

Converter Box

An electronic device that hooks up to an analog television set and its over-the-air antenna. The box converts the digital TV signal into analog, making the signal viewable on an analog TV. Any analog TV set that currently receives free OTA programming via an antenna will need a DTV converter box to continue to receive television service after February 17, 2009.

Cost Per Action (CPA)

A cost model incurred based on a user taking some specifically defined action in response to an ad. Examples of actions include sales transaction, customer acquisition or registration.

Cost Per Click (CPC)

A cost model incurred every time a user clicks on an ad.

Cost Per Lead (CPL)

A cost model incurred every time a user provides specific data to be used by the advertiser as a sales lead.

Click-Thru Rate (CTR)

The ratio of ad clicks to ad impressions.

D

Deck

The portal screen on a wireless phone where the wireless carrier places links to content.

E

Event

Any logged or recorded action that has a specific date and time assigned to it by either the browser or server. The occurrence of an event can be counted in three ways:

Event: Each occurrence of the event is counted; Visit: Each visit where the event occurs at least once is counted; Visitor: Each unique visitor that executed the event at least once is counted.

F

Floating Ads

An ad that appears within the main browser window on top of the web page's normal content, appearing to "float" over the top of the page.

Fold

A term to describe content placement on a page. The fold is the part of the screen that divides what can be seen initially (above the fold) from the content that is only visible by scrolling down (below the fold).

H

Hyperlink

A text or graphic link which redirects the user to a new URL or web page when the individual clicks on the link.

I

IPTV (Internet Protocol Television)

Television and/or video signals are distributed to subscribers or viewers using a broadband connection over Internet Protocol.

L

Landing Page

A web page where a user is taken upon clicking an ad.

Leaderboard

A horizontal ad unit that measures 728x90 pixels.

M

Message Unit

An ad unit that measures 300x250 pixels.

Microsite

A custom website designed specifically for an advertiser.

Mobisode

Mobisode is a media industry term for a broadcast television episode specially made for viewing on a mobile telephone screen and usually of short duration.

O

Opt in

A direct, pro-active request by an individual recipient to have their email address or mobile phone number added to a specific mailing list. Advertisers are offering opt-in mobile updates such as coupons, entertainment options and restaurant reservations for mobile phone users.

P

Page-takeover

An ad that prohibits a user from viewing content on web page until the ad is complete or closed.

Page Views

A statistic used to count web pages seen by users.

Portal

A website that often serves as a starting point for a web user's session. It typically provides services such as search, directory of websites and others such as stock quotes, email or message boards.

Pull

Term used to describe how a wireless subscriber obtains content when they ask (i.e., pull) content to themselves.

Push

Term used to describe how a wireless subscriber obtains content when they don't specifically ask for it each time.

R

Rich Media

A type of ad that incorporates animation, sound, video and/or interactivity. It can be used either singularly or in combination with technologies like streaming media, sound and Flash. It is deployed via standard web and wireless applications.

S

Skyscraper

A vertical ad unit that measures 160x600 or 120x600 pixels.

Share-of-Voice (SOV)

A ratio of impressions bought to the total impressions available on a website.

Social Networking

Web sites that allow people to link to others to share opinions, insights experiences and perspectives, whether it's music fans on MySpace, business contacts on LinkedIn, or classmates on Facebook. Many media sites have adopted social networking features such as blogs, message boards, podcasts and wikis to help build online communities around their content.

U

Unique Visitor

A unique individual or browser who visits a website at least once for a specific time period. If that individual visits more than once during that time period, he/she is counted as one unique visitor. Unique visitors can be identified by user registration or cookies.

2012 Survey Dates

Survey	Survey Dates	Markets
January	January 5–February 1	28 Markets (4 wks)
February	February 2–February 29	210 Markets (4 wks)
March	March 1–March 28	LPM Markets Only (4 wks)
April	March 29–April 25	LPM Markets Only (4 wks)
May	April 26–May 23	210 Markets (4 wks)
June	May 31–June 27	LPM Markets Only (4 wks)
July	June 28–July 25	207 Markets (4 wks)
August	July 26–August 22	LPM Markets Only (4 wks)
September	August 23–September 19	LPM Markets Only (4 wks)
October	September 27–October 24	30 Markets (4 wks)
November	October 25–November 21	210 Markets (4 wks)
December	November 29–December 26	LPM Markets Only (4 wks)

Source: The Nielsen Company

Broadcast Calendar

This standard broadcast calendar, created in the 1960s, is designed to conform to the uniform billing period adopted by broadcasters, agencies and advertisers for billing and planning functions. Under this system, the standard week starts on Monday and ends on Sunday. The standard broadcast billing month always ends on the last Sunday of the calendar month.

2012

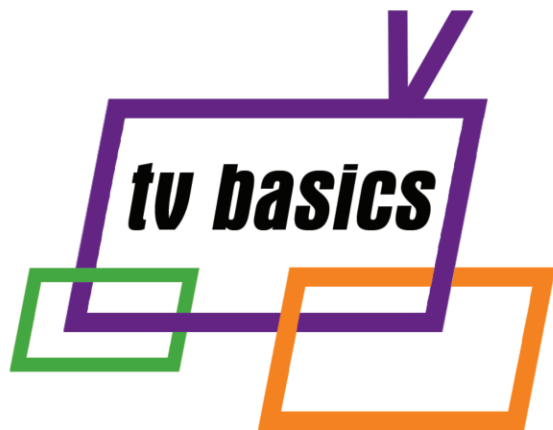
JAN	M	T	W	T	F	S	S
	26	27	28	29	30	31	1
FEB	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
MAR	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
APR	M	T	W	T	F	S	S
	30	31	1	2	3	4	5
MAY	6	7	8	9	10	11	12
	13	14	15	16	17	18	19
JUN	20	21	22	23	24	25	26
	M	T	W	T	F	S	S
JUL	27	28	29	1	2	3	4
	5	6	7	8	9	10	11
AUG	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
SEP	M	T	W	T	F	S	S
	26	27	28	29	30	31	1
OCT	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
NOV	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
DEC	M	T	W	T	F	S	S
	30	31	1	2	3	4	5
JAN	6	7	8	9	10	11	12
	13	14	15	16	17	18	19
FEB	20	21	22	23	24	25	26
	M	T	W	T	F	S	S
MAR	27	28	29	30	31	1	2
	3	4	5	6	7	8	9
APR	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
MAY	24	25	26	27	28	29	30
	M	T	W	T	F	S	S
JUN	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
JUL	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
AUG	M	T	W	T	F	S	S
	29	30	31	1	2	3	4
SEP	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
OCT	19	20	21	22	23	24	25
	M	T	W	T	F	S	S
NOV	26	27	28	29	30	31	1
	2	3	4	5	6	7	8
DEC	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
JAN	23	24	25	26	27	28	29
	M	T	W	T	F	S	S
FEB	30	31	1	2	3	4	5
	6	7	8	9	10	11	12
MAR	13	14	15	16	17	18	19
	20	21	22	23	24	25	26
APR	M	T	W	T	F	S	S
	27	28	29	30	31	1	2
MAY	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
JUN	17	18	19	20	21	22	23
	24	25	26	27	28	29	30

2013

JAN	M	T	W	T	F	S	S
	31	1	2	3	4	5	6
FEB	7	8	9	10	11	12	13
	14	15	16	17	18	19	20
MAR	21	22	23	24	25	26	27
	M	T	W	T	F	S	S
APR	28	29	30	31	1	2	3
	4	5	6	7	8	9	10
MAY	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
JUN	M	T	W	T	F	S	S
	25	26	27	28	1	2	3
JUL	4	5	6	7	8	9	10
	11	12	13	14	15	16	17
AUG	18	19	20	21	22	23	24
	M	T	W	T	F	S	S
SEP	25	26	27	28	29	30	31
	1	2	3	4	5	6	7
OCT	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
NOV	22	23	24	25	26	27	28
	M	T	W	T	F	S	S
DEC	29	30	31	1	2	3	4
	5	6	7	8	9	10	11
JAN	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
FEB	M	T	W	T	F	S	S
	26	27	28	29	30	31	1
MAR	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
APR	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
MAY	M	T	W	T	F	S	S
	30	1	2	3	4	5	6
JUN	7	8	9	10	11	12	13
	14	15	16	17	18	19	20
JUL	21	22	23	24	25	26	27
	M	T	W	T	F	S	S
AUG	28	29	30	31	1	2	3
	4	5	6	7	8	9	10
SEP	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
OCT	M	T	W	T	F	S	S
	25	26	27	28	29	30	1
NOV	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
DEC	16	17	18	19	20	21	22
	23	24	25	26	27	28	29

Note: Circled dates designate holidays.

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