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Raycom and DataSphere to Launch Hundreds of Neighborhood Websites in 35 Cities Across the U.S.

MONTGOMERY, Ala., March 3 /PRNewswire/ -- Raycom Media, one of the nation's largest broadcasters, and DataSphere Technologies, the leading provider of hyperlocal Web technology and sales solutions for media companies, today announced an agreement to launch neighborhood focused websites across the U.S. The Websites will be launched in cities served by Raycom's television stations and will provide local communities with the best source of information about news, events, entertainment and personalities relevant to their day-to-day lives. Local businesses will also benefit from the opportunity to reach their potential customer base within a compelling new context.

This agreement is the latest implementation of DataSphere Technologies' LocalNet service, a comprehensive solution that already provides turnkey technology, advertising and sales capabilities for 5 media companies and more than 160 neighborhood sites.

"Raycom's focus has always been on contributing to the local community, seeking out divergent points of view and creating an atmosphere of community dialog," said Paul McTear, President and CEO of Raycom Media. "DataSphere's LocalNet service will allow us to further fulfill this vision rapidly, and with greater efficiency than would otherwise be possible."

The first of Raycom's LocalNet implementations will be operational before the end of April and will take advantage of both LocalNet's advanced technology platform and DataSphere's seasoned, professional sales team to deliver a great visitor experience and significant revenue within weeks of launch.

"We're excited about the opportunity to work with one of the broadcasting industry's major players to bring a new option for local information to another 13% of the US population," stated Satbir Khanuja, CEO of DataSphere. "In addition to the news and other information of particular interest to the residents of these communities, small local businesses will now have an extremely compelling alternative platform to reach and communicate with their specific customer base."

About Raycom Media

Raycom, an employee-owned company, is one of the nation's largest broadcasters and owns and operates 46 television stations in 18 states. Raycom stations cover more than 13 percent of U.S. television households and employ 3,500 individuals in full and part-time positions. In addition to television stations, Raycom owns Raycom Sports (a marketing, production and events management and distribution company in Charlotte); Raycom Post (a post production facility in Burbank, California), and Broadview Media (a post production/telecommunications company based in Montgomery).

About DataSphere

DataSphere Technologies, Inc. (<http://www.DataSphere.com>) is the leading Web technology and hyperlocal ad sales company focused on generating online profits for media companies. DataSphere offers a range of turnkey solutions to rapidly improve Website monetization and visitor experience with minimal investment of time and

money.

DataSphere is headquartered in Bellevue, Washington, USA and led by a team of Internet veterans with backgrounds from Amazon.com, IMDb, Microsoft, RealNetworks and AltaVista.

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Syndicaster Adds AOL, Brightcove, And YouTube Distribution For Local TV News Clips

Erick Schonfeld

Apr 14, 2009

Continuing its quest to bridge the world's of broadcast television and the Web, [Syndicaster](#) is adding several online distribution options for local TV stations, including the ability to publish video clips to YouTube, AOL (via Brightcove), Yahoo and other sites. Syndicaster is an [online editing and video-clip management service](#) that allows TV stations to any broadcast news clip and repurpose it for the Web by publishing it to their own Websites or through its sister service [ClipSyndicate](#) (both Syndicaster and ClipSyndicate are divisions of [Critical Media](#)).

Now Syndicaster is adding one-click distribution options to the major video sites so that local TV affiliates or station groups can post their videos to AOL Money & Finance or their YouTube channel, and manage it all from one place. One feature that TV customers will appreciate is the ability to set embargo windows for each service, allowing a TV station to publish hot news immediately to its own site, then 24 or 36 hours later to video partner sites where it makes the most money, and then maybe finally to YouTube.

Syndicaster has also recently added an on-location feature which allows TV reporters and crews to upload clips directly from wherever they are capturing the footage, and making that footage available as Web video clips even if it never gets airtime. Affiliated stations can also go to Syndicaster to find footage and use it either on the Web or on-air, depending on their arrangements with each other. When that airplane crashed in Buffalo, NY recently, a local station put all of its footage on Syndicaster, and other affiliated stations around the country used it to grab video footage for their own on-air reports.

Syndicaster charges a flat subscription fee of about \$850 a month per TV station or news organization. With 60 paying customers, that comes to about \$50,000 a month a few months after launch, with a lot of runway for growth. Syndicaster is exploring ways to bring its online editing and video distribution platform to consumers, but so far it is stumped in that area. CEO Sean Morgan admits:

Look, I don't know how to make money on the consumer. I'd like to make money on this. We are getting great traction from broadcasters. Bringing it to newspapers is obviously the next path forward.

In May, the company plans to expand its reach to newspaper sites with Syndicaster for Newspapers. As news organizations of all stripes make video a bigger component of their online offerings, Syndicaster is hoping to become the industry standard for ingesting, editing, and distributing these videos. Maybe the [A.P. should look into it](#).



KaRi from ThePrimeSpot.com 1 year ago

How is this better than Mogulus?

Like

Reply



Travis 1 year ago

Anyone remember Zatso.com's personalized video newscasts back in internet 1.0? They were trying to help stations get local news online...apparently way ahead of their time.

Like

Reply



Douglas Holt 1 year ago

Seems like Eric is just announcing that Syndicaster is adding new broadcast outlets to it existing service, not that this is a new service. Not sure how this new information would be considered "schilling" for this startup.

Like

Reply



Ryan McGee 1 year ago

This author, Eric Schonfeld, is obviously a shill for Critical/Sean Morgan. He says this is a new service -- a few months old -- yet here is his article from over a year ago announcing this same service!! LOL

<http://www.techcrunch.com/2008.../>

Like

Reply



GuiasLocal 1 year ago

This is very interesting and I believe it can catch on. Although a bigger company like a Viacom that has a larger reach and more money will complain and find a way to make money from it like the Music industry.

Like

Reply



Ameeda 1 year ago

The embargo feature is really useful and could set these guys apart, especially when a lot of traditional news orgs are wary of losing control over their content so quickly that it becomes less valuable.

www.snazi.com

Like Reply



BroadcastLocator.com 1 year ago

pretty soon all local internet news will be user generated. the most compelling contributors will float to the top. syndicates will charge 8.50 a year and have 5 million subscribers.

VideosLocator.com - just watch

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Real-time updating is enabled. (Pause)

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Posts about: Critical media

Syndicaster Adds AOL, Brightcove, And YouTube Distribution For Local TV News Clips



Continuing its quest to bridge the world's of broadcast television and the Web, **Syndicaster** is adding several online distribution options for local TV stations, including the ability to publish video clips to YouTube, AOL (via Brightcove), Yahoo and other sites. Syndicaster is an **online editing and video-clip management service** that allows TV stations to any broadcast news clip and repurpose it for the Web by publishing it to their own Websites or through its sister service **ClipSyndicate** (both Syndicaster and ClipSyndicate are divisions of **Critical Media**).

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[Read More](#)

Syndicaster.TV Launches. Gives Broadcasters An Instant Way To Publish TV on the Web

by Erick Schonfeld on January 22, 2008

Critical Media, a New York City startup that operates Web-based video clipping and video syndication services for local TV and national news content, jut launched **Syndicaster.TV**. Geared at local TV stations and television groups, Syndicaster.TV lets broadcasters log onto the Web and capture video clips from any TV station minutes after they air.

They simply select the portion of the video they want by highlighting the desired section of an accompanying speech-to-text transcript. Then they can download the clip as a WMV or Flash file for republishing to their Websites, automatically distribute them across the Web through **ClipSyndicate** (Critical Media's **TV-to Web syndication platform**), or transcode the video clips and send them to iTunes.

Syndicaster.TV is free to any broadcaster who is a partner in ClipSyndicate. "Bloomberg has been using it for four months, making 60 to 90 clips a day," says Critical Media CEO Sean Morgan. The service is basically a combination of ClipSyndicate and his Critical Mention video-clipping service, which already captures TV signals from more than 600 TV Stations in North America and elsewhere and makes them viewable

immediately on the Web. Now he is taking that video and making it instantly publishable to strengthen the position of ClipSyndicate.

Since all the video gets translated into text, the broadcasts from each station can be delivered as an RSS feed to station executives. Morgan is also looking into creating a Syndicaster offering for radio stations, which would capture just the audio and allow them to publish radio-show segments, along with full transcripts embedded as searchable meta data.

ClipSyndicate Videos Now On Truveo, Bebo, Magnify, and Lingospot

by Erick Schonfeld on January 9, 2008

Video clips from local TV news affiliates are making their way onto the Web through a service called [ClipSyndicate](#) that's been in beta for [more than a year](#). The service, which is owned by New York City startup [Critical Media](#), has more than 200,000 archived news clips and adds about 1,000 a day from about 200 local affiliates of ABC, NBC, CBS, and Fox, along with video from Bloomberg TV, the AP, UPI, and the *New York Times*. About 350 niche Websites are participating in the beta—including [Military.com](#), [Construction.com](#), and [PetHealthFocus.com](#)—and they collectively serve up two million ClipSyndicate videos a month.

Now ClipSyndicate is spreading its API to video search sites like AOL's [Truveo](#) and other services like [Magnify](#) (which we [reported earlier](#)) and [Lingospot](#). For instance, ClipSyndicate videos come up in regular video searches in Truveo and play in an [embedded ClipSyndicate player](#). On this [Magnify page for Barack Obama](#), the "Obama News" videos come from ClipSyndicate. And Lingospot, which creates an in-text search bubble when you mouse over a linked term (see left), can show ClipSyndicate videos in its bubbles. You can even find ClipSyndicate videos [on Bebo](#), although you have to look hard and there is no official deal yet with the social networking site.

To get a sense of the entertainment value of some of this stuff, here is a news clip from a local Oregon station about a man with blue skin who is moving to California in search of more tolerant neighbors:

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⌵

This Release of the ClipSyndicate player is no longer supported.

[Click Here to view this video.](#)

Find more videos like this on www.truveo.com.

ClipSyndicate serves ads with the videos and splits the proceeds as follows: 30 percent to the content producer (i.e., the local TV station), 20 percent to the API partner or Website where the video is seen, and 50 percent for itself. (Although the beta and APIs are available by invite only, the company plans to open up participation to all comers by the end of the first quarter). Critical Media CEO Sean Morgan tells me that he is getting \$50 CPMs on the video ads sold through his salesforce compared to \$8 to \$12 CPMs from backfill video ad networks because the videos tend to appear on extremely targeted sites. Think Yummy Chummy ads on PetsHealthFocus. His sweet spots are mortgage, pets and animals, and health sites. He also claims that he is seeing close to three percent click-throughs on his graphical banner ads compared to quarter-point click-throughs on run-of-network ads.

What he is excited about, though, is marrying the brand advertising of video with the specificity of search. Truveo, for instance, passes the search terms through the API, so that can inform what types of ads are shown, in addition to the actual content of the video. As ClipSyndicate's business model develops, we'll see if it is actually possible to make money from the long tail of video (although note that this is still professional-quality video, and much higher up the curve than most of the audience-generated video on the Web).



Special Report: State Of The Industry

TV & Papers Ramp Up Similar Strategies

By Diana Marszalek

NetNewsCheck.com, September 13, 2010 9:18 AM EDT

Much like the Texas city it covers, [NowAustin.com](#) has a distinct and lively vibe. The website highlights Austin culture, notably live music and nightlife. It's got green tips and news deemed "strange," all furthering what one of its architects calls a "pure, local kind of feel to journalism."

NowAustin.com also offers local news, weather and sports. That makes sense on several levels, not the least of which is that NowAustin.com is a product of LIN Media, which also operates NBC affiliate KXAN and its companion website KXAN.com in town.

In creating NowAustin.com, LIN is one of a growing number of TV broadcasters and newspaper publishers now pursuing digital dollars by targeting niches within their markets -- some geographical, some special interest.

The early efforts of newspapers and TV stations on the Web focused on market-wide portals for news and information, natural extensions of what they have done on air or in print. Most still harbor that ambition.

But at the same time, they are offering an array of targeted services that amass audiences and revenue in smaller bits. They are also eyeing opportunities in the burgeoning mobile arena.

As locally-based media businesses, TV and newspapers face common disruption from national Internet innovators, and their digital strategies are looking increasingly similar. Both businesses are also realizing that their strength may be serving news and advertising across multiple platforms.

"The Web is not a silver bullet," said Bob Papper, a media studies professor at Hofstra University in New York. "What you have now is a more realistic model of where the Web fits in," Papper says. "The new business model isn't trading in one business for another. The new business model is you're in a lot of businesses."

Mark Fratrik, a VP at BIA/Kelsey, agrees. "There isn't a mega-hit; there is no one answer."

Staking out market share: Driven by the loss of classified ad dollars to the Web, newspapers claimed their online turf at a more ferocious pace than TV stations did. And looking at the numbers, the newspapers' headstart is still paying off. In 2009, newspapers grabbed 23.6% of the \$13.4 billion in local online ad revenue, while TV stations only picked up 8.7%, according to Borrell Associates.

But newspapers' share of online revenue has fallen as more players jump in the game, and TV stations are making gains as they focus new energy on digital business.

In Raleigh, for example, WRAL's website draws 57% of the market's online audience.

Special Report



State Of The Industry: Local Digital Media 2010

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And, according to ComScore's May report, LIN Media's TV station websites are beating newspaper portals in 11 of its 17 markets.

Allbritton Communications, owner of WJLA, the ABC affiliate in Washington, has gone right after washingtonpost.com with TBD.com, a local site that shares content with WJLA as well as with Allbritton's regional cable news service, News Channel 8.

"We don't want it to be just an adjunct for the TV station," says Allbritton's Jerry Fritz. "This will be competitive to all media. This is a new way of looking at coverage and information."

The prize is getting bigger.

According to a Borrell report, local online ad spending will grow an average 4.1 percent annually over the next three years before leveling off in 2014 at \$16.4 billion.

And there is more to be had. Spending on mobile media is expected to surge, more than doubling each year over the next four to reach \$14.6 billion.

Hyperlocal niches: Legacy media have reached the realization that simply leveraging their old brands online and in mobile is not enough to win larger digital audiences and larger shares of the digital advertising.

So, they have begun focusing their efforts on niche services, either verticals like NowAustin.com or hyperlocal sites aimed at neighborhoods rather than entire media markets. In doing so, hometown media companies are trying to protect the turf over which they have reigned for years, says Gordon Borrell, CEO of Borrell Associates.

"I really do think it's the last little moat around the local media castle they can protect." Plus, the niche services can be moneymaking opportunities, he says.

Research shows that adults make 80% of their purchases within a five-mile radius of their homes. So it makes sense that media companies would try to woo those merchants with a product designed for their customer base, he says.

Fisher Communications, a Seattle-based TV and radio company, has been rolling out hyperlocal news-and-information sites within some of its TV markets and enjoying some success. Since last August, the company has rolled out 124 neighborhood sites. Seattle-area residents can access more than 50 [neighborhood-specific sites](#) through Fisher's main TV station website, komonews.com.

In Eugene, Ore., KVAL.com users can access about 12. Ads on the sites may not command top dollar, particularly since part of their goal is to court local businesses that may not have the resources to buy spot TV or newspaper ads. Some go for as little as \$35 a month. One hundred fifty sites that generate, say, \$2,000 a month each could mean \$3 million a year for the company that runs them, says Fisher CEO Colleen Brown. "It's OK to roll up the nickels."

Datasphere, the tech company that created the platform and sells the ads on Fisher sites, has launched more than 500 similar hyperlocal sites in partnership with other broadcasters, says Gary Cowan, the company's VP of products. That number is growing by more than 100 a month, with new companies, like Gannett, Raycom, Local TV and Hubbard jumping on board, he says.

"Previously, it was once size fits all," Cowan says. "Now you can supplement that with neighborhood specific news."

Of course, newspapers are pursuing the hyperlocal business as well.

Calkins Media is going the hyperlocal route in the Philadelphia area, where it owns several papers. Phillyburbs.com

offers users neighborhood-focused news and information. It also has an online marketplace, where users can look for jobs, homes and cars, and social networking features, like photo uploads.

Northern Kentucky residents can get their daily dose of “life in the (859)” at kypost.com, a hyperlocal site started by Scripps Media after the company’s newspaper, The Kentucky Post, closed at the end of 2007. Often overshadowed by neighboring Cincinnati, the suburbs of Northern Kentucky are the kinds of communities made for a targeted site. It now garners 1.5 million to 2 million page views a month, says Adam Symson, Scripps’ VP of interactive for television. “It’s really a community of its own ... and the audience there was clearly underserved.”

Not all such hyperlocal efforts have reaped the rewards their backers were hoping for. In June, the New York Times pulled the plug on its 15-month-old experiment, New Jersey Local, leaving web coverage of several communities to the older, independent baristanet.com.

The idea of niche sites aimed at people’s interests, rather than neighborhoods, also is taking hold. On the heels of NowAustin.com’s success, LIN plans to launch similar sites in its other LIN markets, a company spokeswoman said. As in Austin, LIN intends to form strategic alliances with partners who can provide local content, she says.

This week, LIN is expected to roll out OnPolitix.com, through which users in each of its TV markets will be able to keep up-to-date on local, regional and national political news. LIN had similar state-wide political sites up and running in 2008, but those sites came down with the end of the campaign season.

Several TV station groups have been experimenting with sites that cover high school sports. In San Antonio, Belo’s KNES has partnered with a service that provides up-to-date news and scores so that it can operate the sports site without its taking a heavy toll on its staff, according to Jan Boyd, director of digital media at the station.

It’s been a learning process, says Ron Stitt, director of digital media for the Fox stations. “A couple of years ago, we and others came to the realization that the template approach didn’t work that well and [the sites have] now evolved appropriate to their markets,” he says. By tailoring to markets and adding new features such as live streaming of games, the sites have made significant gains, some more than others, he says. In Minneapolis, KMSP’s site is going “gangbusters.”

Obits are working for Meredith Local Media, an owner of TV stations in 12 markets. Starting at its CBS affiliate in Flint-Saginaw, Meredith is selling obits through local funeral directors and posting them on dedicated websites like ObitMichigan.com. It’s also learned that it can promote and enhance the service by scrolling them on air during breaks in newscasts. Meredith is now syndicating the service to other broadcasters and now has more than two dozen stations lined up.

NBC TV stations in 10 markets have traded in traditional news sites for lifestyle-oriented ones. While the sites, including NBCNewYork.com and NBCChicago.com, still have news, they also offer the latest on fashion, dining and pop culture, and host interactive social features.

Newspapers are launching special interest sites, too. In Bloomington, Ind., the Herald Times is trying to lure wine lovers to hoosierwinecellar.com, “your premier resource for wines from Indiana to Italy.”

The Santa Fe New Mexican has spawned Santafescoop.ning.com for animal lovers; etastesantafe.ning.com for foodies; and santafegreenline.ning.com for environmentalists.

The Orlando Sentinel covers its city’s main attraction with the thedailydisney.com. TV stations and newspapers are both selling small business services designed to bring in both dollars and audiences.

TV stations in 30 markets are offering Seek It Local, Inergize Digital’s hyperlocal business directory designed to

generate revenue on air, on line and on mobile. Seek It Local appears on 31 websites, representing 63 TV stations, according to Inergize SVP and GM Jason Gould. The participating stations are averaging \$550,000 in annual revenue on the service, Gould says.

Inergize also is developing mobile marketing services like an iPhone app that will allow users to find geographically targeted business information, like the location of a local coffee shop, as well as coupons, Gould says. Although mobile has yet to reach maturity as an advertising vehicle, TV stations and newspapers are focusing on the potential, from text message alerts to sponsored content, and whether it will disrupt the current state of media affairs, just as the Internet has.

More than 150 TV stations are reaching mobile audiences through News Over Wireless, a customized mobile delivery service created by Capitol Broadcasting, a small TV station group based in Raleigh, N.C. News Over Wireless offers stations a variety of means for distributing content and advertising over mobile, including text and e-mail alerts and smart phone apps, says Jimmy Goodman. All the offering are an outgrowth of services tried and proved by Capitol's flagship station, WRAL Raleigh, says Goodman. "We eat our own dog food."

Newspapers also are also getting increasingly active in the mobile space. Led by The Wall Street Journal, New York Times and USA Today, they are creating apps for smart phones and the other proliferating mobile devices.

And they are creating services aimed specifically for the mobile market, the OrlandoSentinel.com's mobile offerings, for example, provide users with alerts on everything from breaking news to what's happening around town.

Legacy media companies are far from alone in trying to capitalize on niche and mobile service. They face a plethora of competitors that may not have the history and the head start that they have, but that are nimble and aggressive.

As Fox's Stitt puts it: "We are competing with anyone out there drawing audiences."

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**Before the
FEDERAL COMMUNICATIONS COMMISSION
Washington, D.C. 20554**

In the Matter of)	
)	
Examination of the Future of Media and)	GN Docket No. 10-25
Information Needs of Communities In a Digital)	
Age.)	

**COMMENTS OF
THE RADIO TELEVISION DIGITAL NEWS ASSOCIATION**

The Radio Television Digital News Association (“RTDNA”), by its attorneys, hereby submits its comments in response to the Public Notice issued by the Federal Communications Commission (“FCC” or “Commission”) in the captioned proceeding.¹ RTDNA is the world’s largest professional organization devoted exclusively to electronic journalism. RTDNA’s membership includes news executives in broadcasting, cable and other electronic media in more than thirty countries.

The Commission has instituted this proceeding, in part, “to assess whether all Americans have access to vibrant, diverse sources of news and information that will enable them to enrich their lives, their communities and our democracy.”² Because a drive for some sort of regulatory (or de-regulatory) action is implicit in this broad initiative, RTDNA urges the Commission to hold true to its commitment not to run afoul of the First Amendment or otherwise to do harm. Any regulation that touches upon the content of broadcast news or intrudes into broadcast newsrooms is perilous for our democracy, rife with the potential for unintended consequences,

¹ *FCC Launches Examination of the Future of Media and Information Needs of Communities in a Digital Age*, Public Notice, DA 10-100 (rel. Jan. 21, 2010) (“Public Notice”).

² *Id.* at 1.

and wholly unnecessary. Local radio and television stations are alive and well and functioning at a very high level. As they have for decades, local broadcasters play a sustaining role in their communities, including as lifelines during times of emergency or crisis. Traditional over-the-air broadcasters are using synergistic approaches among multiple stations to create more news offerings, they have deployed innovative new digital and Internet technologies to disseminate local news and information to their listeners and viewers, they are facilitating conversations in their communities on air and on line, and they continue to be the preferred source of news for most citizens.

The midst of the digital media revolution is no time for rash government intervention. Local broadcasters are uniquely positioned to assess the wants and needs of the citizenry, and they are constantly evaluating how best to serve their communities—not because of a government edict, but because doing so is the key to their survival. As a practical matter, additional regulation will not further the goals the Commission seeks to achieve but will turn its efforts upside down by draining broadcasters' resources and by forcing broadcasters to base editorial decisions on the FCC's private notions of what the public ought to hear rather than the desires of the audiences broadcasters are licensed to serve. Moreover, radio and television stations compete with a plethora of traditional and new media platforms unencumbered by regulation. Government policy should be designed to foster competition, not to unfairly handicap certain marketplace participants.

RTDNA has demonstrated its willingness to participate in a conversation among various constituencies about how broadcast journalists are faring in an increasingly competitive and diverse market for news and information. If, however, this proceeding has been launched to lay the factual groundwork for regulatory action that would touch upon journalists' editorial

discretion or otherwise encumber their ability to do their jobs, then the FCC should be aware that the same drive that compels journalists to keep their communities informed and hold the government accountable will also be applied to the defense of our country's centuries-old tradition of a free and *independent* press.

I. THE STATE OF BROADCAST JOURNALISM

Since the Commission deregulated radio broadcasting in the early 1980s, local news and public affairs programming has—in the Commission's own words—"proliferated,"³ and RTDNA's own research supports this conclusion. Over the past 16 years, RTDNA has commissioned Bob Papper, the Lawrence Stessin Distinguished Professor of Journalism and chair of the Department of Journalism, Media Studies, and Public Relations at Hofstra University, to conduct annual surveys of broadcast television and radio news operations.⁴ The collective weight of Papper's research establishes several trends within the broadcast industry. Despite two economic recessions over the last decade and an unprecedented explosion in the number of competing outlets for news and information, broadcast journalism is very much alive and continues to provide a vital service to the public, for free. In the face of competition from national and international media, broadcasters are providing more local news and information programming as a way of distinguishing themselves. Moreover, broadcasters are leveraging their online and social media presence to augment and support broadcast products, not to replace them. Finally, advances in digital technologies are enabling broadcast journalists to provide better coverage of important issues at a lower cost and in formats that respond to market demands.

³ 2002 *Biennial Regulatory Review*, Report and Order and Notice of Proposed Rule Making, 18 FCC Rcd 13620, ¶ 122 (2003).

⁴ The most recent RTDNA/Hofstra survey is attached hereto as Exhibit A (the "2010 Survey"). Past surveys are publicly available at RTDNA's website, <http://www.rtdna.org/pages/research/staffing-and-profitability.php>.

A. Local Broadcasters Compete with National Media Using Local News and Information Programming.

Without a doubt, the current economic recession has hit broadcast journalists hard. In 2009, television newsrooms cut 400 jobs (or 1.5 percent of the workforce), which was an improvement from the prior year's elimination of 1,200 jobs (or 4.3 percent of the workforce). Yet, during this same two year period, the average amount of local news broadcast by television stations on an average weekday increased by from 4.1 hours to 5.0 hours—a jump of 18 percent. Although gains among radio stations have been more modest over the past year,⁵ between 2004 and 2008, radio stations, on average, doubled the number of minutes each weekday devoted to local news.⁶ The reason for this trend is simple: in an increasingly competitive media landscape, “localism is the market advantage that broadcast stations have over other programming competitors.”⁷ Indeed, the Commission recognized this truth in 1984, when it deregulated television content: “*future* market forces, resulting from increased competition, will *continue* to require licensees to be aware of the needs of their communities.”⁸

What was true in 1984 remains true today. The mass media, however, have changed: the major television networks stream their programs online—sometimes within twenty-four hours of broadcast—and national and international news programming is dominated by a handful of national newspapers, cable news networks and their respective online outlets. As a result, while

⁵ 2010 Survey.

⁶ 2004 RTNDA/Ball State University Survey, available at <http://www.rtdna.org/media/pdfs/communicator/2004/sep/092004-Research.pdf> (“2004 Survey”); 2008 RTNDA/Hofstra University Survey, available at <http://www.rtdna.org/media/pdfs/research/Bob%20Paper%20-%20Profitability%20Survey%202.pdf> (“2008 Survey”).

⁷ Robert M. McDowell, Commissioner, FCC, Keynote Address at the 2008 Quello Communications Law and Policy Symposium (April 23, 2008), available at http://hraunfoss.fcc.gov/edocs_public/attachmatch/DOC-281772A1.pdf.

⁸ *The Revision of Programming and Commercialization Policies, Ascertainment Requirements, and Program Log Requirements for Commercial Television Stations*, 94 FCC 2d 1076, ¶ 49 (1984) (emphasis added); see also, e.g., *Deregulation of Radio*, 84 FCC 2d 968, ¶ 26 (1981) (noting that “stations will continue to present [local] programming as a response to market forces” and that “marketplace forces will assure the continued provision of news programs in amounts to be determined by the discretion of the individual broadcaster guided by the tastes, needs, and interests of its [audience]”).

television audiences may have several options for viewing the latest episode of ABC's *Lost*, these same viewers are increasingly reliant on local broadcast stations for information about their communities, especially in communities with failed or failing daily newspapers. A study released earlier this year by the Pew Research Center confirms the persistent, strong demand for broadcasters' news and information programming: on a typical day, 78% of Americans turn to a local television station and more than half tune to a local radio station to receive news and information programming.⁹

Broadcasters, in turn, continue to structure their businesses to respond to the strong demands—particularly among television audiences—for local news and information. For example, over the past five years, television broadcast stations have increased their reliance on local news programming as a source of revenue. In 2005, a television station's newsroom generated 42.8% of the station's revenue.¹⁰ Today, the average television newsroom generates 44.7% of station revenue.¹¹ Radio stations are making similar changes to respond to their audiences. In 2009, more than a quarter of the radio stations surveyed in the RTDNA/Hofstra study devoted additional time to broadcasting local news and information, and 17% indicate that they plan to do the same in 2010.¹²

B. Broadcasters Leverage Online and Social Media to Promote and Enhance Broadcast Newscasts.

During the Commission's March 4, 2010 workshop on the future of media, Paul Starr of the Woodrow Wilson School, Princeton University, addressed the history of regulating the news

⁹ Pew Research Center, *et al.*, *Understanding the Participatory News Consumer* 3, available at http://www.pewinternet.org/~media/Files/Reports/2010/PIP_Understanding_the_Participatory_News_Consumer.pdf (last visited May 4, 2010).

¹⁰ Bob Papper, *News, Staffing, and Profitability Survey*, Communicator, Oct. 2005, at 34, available at <http://www.rtdna.org/media/pdfs/communicator/2005/oct/102005-34-38.pdf> ("2005 Survey").

¹¹ *2010 Survey*.

¹² Bob Papper, *TV and Radio News Staffing and Profitability Survey 2009*, available at <http://www.rtdna.org/media/pdfs/research/TV%20and%20Radio%20Staffing%20and%20Profitability.pdf> ("2009

media and noted that audiences have traditionally obtained informed about local news and events because of “incidental” encounters with the news.¹³ For example, newspaper readers might scan the front page headlines on their way to read the comics or the sport sections. Similarly, television viewers are exposed to promotional spots for a station’s newscast that promise “more, at eleven.” According to Starr, in today’s “more fragmented media environment,” people are less likely to “bump into the news.”¹⁴ Starr goes on to cite a 2008 survey by the Pew Research Center that indicates that more than a third of 18 to 24 year-olds “get no news on an average day.”¹⁵

RTDNA’s members are keenly aware that digital media evolve rapidly and that what was true in 2008 may no longer be the case today.¹⁶ As such, RTDNA quibbles with Starr’s reliance on the 2008 Pew survey. As demonstrated in the 2010 Survey, over the past year, broadcasters’ use of social media—primarily Twitter and Facebook—skyrocketed. In the 2009 Survey, 36 percent of television stations indicated that “they were doing nothing with social media.”¹⁷ In 2010, that number dropped to eight percent.¹⁸

But what is impressive about television broadcasters’ use of social media is that they are not simply reformatting newscasts for online viewing. Instead, television stations are using social media to involve their audiences in news processes in order to lithely respond to the particular demands of their audiences, especially those who would ordinarily “get no news on an

(Continued . . .)

Survey”); *2010 Survey*.

¹³ Paul Starr, *Statement to the FCC Workshop on the Future of Media and Information Needs of Communities 4* (March 4, 2010).

¹⁴ *Id.*

¹⁵ *Id.* (citing <http://people-press.org/report/444/news-media>).

¹⁶ This recognition is the reason why, after more than 60 years as the “Radio-Television News Directors Association,” the organization changed its name to the “Radio Television Digital News Association” in 2009.

¹⁷ *2010 Survey*.

¹⁸ *Id.*

average day.”¹⁹ For example, in 2010, television broadcasters used social media to solicit audience feedback and comments, to develop story ideas, and to request other user generated content (such as photos and videos) that could be used in reporting local stories.²⁰ Notably, a television station’s use of social media is largely independent of market size, network affiliation or geography.²¹

Given television broadcasters’ eager and rapid adoption of social media, Professor Starr’s observation that Americans—especially young Americans—are less likely to “bump into the news” in today’s diverse media landscape falls flat. While Twitter was initially a service adopted by the 35+ demographic, over the past year, use of Twitter by the 17 and under and 18-24 year-old sets have increased dramatically.²² As broadcasters continue to develop their use of social media, those who do not watch traditional newscasts or encounter promotional spots between prime-time programs, may be prompted by an intriguing tweet or posting on Facebook to watch news footage online or to “tune in for more, at eleven.”²³ In this manner, broadcasters have expanded the extent of their service by reaching out to audiences that have abandoned traditional media formats while continuing to provide free, over-the-air broadcast service.

C. Technological Advances Enable Broadcast Journalists to Do More, at a Higher Quality, with Fewer Resources.

As noted above, despite cuts to newsroom budgets and staff, broadcasters have increased the amount of news and information programming they air. Skeptics may claim that this result is only achieved through a reduction in quality, but such criticisms are based on a flawed

¹⁹ See *supra*, note 15.

²⁰ 2010 Survey.

²¹ *Id.*

²² See, e.g., Business Insider, Chart of the Day, <http://www.businessinsider.com/chart-of-the-day-the-youngsters-flocked-to-twitter-in-2009-2010-2> (last visited May 4, 2010).

²³ For example, as of May 4, 2010, one D.C. television station, WUSA(TV), has 10,564 Twitter “followers” and 6,089 Facebook “fans,” many of whom will incidentally encounter local news and information through the station’s regular tweets and posts.

assumption that broadcast journalists have not evolved and maintain a *status quo* in the methods of gathering, producing, and airing news. This is not the case, and RTDNA submits that advances in digital technologies have created efficiencies that allow electronic journalists to do more with less—without sacrificing quality.

While the number of people employed by broadcast news operations generally increased over the past 35 years to accommodate additional news programming or to create new program offerings, recent market disruptions have compelled broadcasters to use resources as efficiently as possible. Faced with an increased demand for news programming and a static or declining newsroom budget, broadcasters turn to technology to increase editorial capacity. Cameras and editing suites are smaller, lighter, and easier to use. As a result, some broadcasters are finding that a single electronic journalist can take the place of a three-person team. This new breed of multimedia journalist has been given various titles—from a “one-man-band” to an “all platform journalist”—but regardless of the label, broadcasters have found that a single journalist can provide more nimble coverage of certain types of news events. According to one news executive, the “one-man-band” approach, coupled with new digital tools, has had a democratizing effect in the newsroom. Now, everyone in the newsroom can have a beat and stations are putting more “boots on the ground” to provide broader coverage, generally, or to target key areas with greater intensity.

Broadcasters are also using digital and online technology to create journalistic content that is intended to augment, not to supplant, stations’ regular newscasts, but which does not easily translate to a broadcast format. For example:

- Many stations are creating hyper-local sites for neighborhoods. KOMO-TV in Seattle has built 50 hyper-local web sites so far.²⁴

²⁴ See KOMO News, <http://komonews.com/communities> (last visited May 5, 2010).

- Stations are extending their investigative reporting by creating searchable databases on their websites. WCMH-TV in Columbus, Ohio, created databases on Columbus burglaries, Ohio stimulus requests, state liens, and 18 other topics.²⁵ WPTV-TV in Palm Beach has a searchable “Restaurant Report,”²⁶ that compiles government inspection reports.
- Stations—even small-market stations like WJBF(TV) in Augusta, GA—are using Google Maps to show where news is happening.²⁷
- Stations are also aggregating live source feeds. WFLD(TV) in Chicago, IL, has created a website, LiveNewsCameras.com, that aggregates and streams multiple video feeds of live coverage to provide multiple angles during breaking news events and dozens of angles and viewing options during schedule news events.
- Stations are investing technology that enables audience members to participate in the collection and dissemination of news. Local stations in Washington, DC, collected viewer video and other information during the snowstorms and featured this material on their web site and on air.²⁸
- Radio stations are extending their online reach by incorporating video and text as well as audio into their web sites. WAKR(AM) in Akron, Ohio, provides news, traffic and weather in a 24/7 audio stream—the online equivalent of an all-news radio station—and also provides a daily video podcast to Akron’s 250,000 residents.²⁹ Similarly, WTOP-FM, in Washington, D.C., created an internet-only radio station focusing on news for federal government workers.³⁰ The station proved so popular it is now broadcast on WTOP(AM).

Because of these innovations and efficiencies, broadcasters remain a vibrant source of important investigative journalism. For example in 2010, station KHOU-TV, in Houston, Texas received a regional Edward R. Murrow Award for its two-year investigation of the Texas National Guard. The station’s investigation, which began with an inquiry into allegations of harassment of and discrimination against female officers, quickly expanded and uncovered instances of corrupt practices and misappropriation of funds by the Texas National Guard’s commanding officers. KHOU-TV’s reporting spurred formal investigations by state and federal

²⁵ See NBC 4i, <http://www.nbc4i.com> (last visited May 5, 2010).

²⁶ Florida Restaurant Inspections, <http://www.wptv.com/content/restaurants/inspections/default.aspx> (last visited May 5, 2010).

²⁷ WJBF, <http://www2.wjbf.com> (last visited May 5, 2010).

²⁸ Live Snow Video, <http://www.myfoxdc.com/subindex/video/viewercams> (last visited May 5, 2010).

²⁹ AkronNewsNow.com, <http://www.akronnewsnow.com/news/wakrnewsnow.asp> (last visited May 5, 2010).

lawmakers and ultimately resulted in Governor Rick Perry relieving the Texas National Guard's top officers of their command and installing a new leadership team, which included, for the first time in Texas history, a female commander of the Texas Army Guard.³¹

D. Broadcasters Continue to Play a Critical Role During Times of Emergency.

Yet another way of assessing the state of the news industry is through our collective experience with electronic journalism. Local broadcasters cover breaking news events ranging from severe storms to government abuses. They serve their communities with weather and sports, coverage of local elections and politics, and public affairs programming. But, given their affinity for local communities and their one-to-many distribution model, broadcasters' most compelling and unique role is the dissemination of critical information quickly and efficiently during times of emergency.

There are countless examples across the country, whether on 9-11 or during Hurricane Katrina, or during emergencies that never made national headlines but affected local citizens acutely, where broadcasters were the primary source of critical information about health and safety—either because the government could not get the information out itself, or because cell phones or other communications services were impaired. During the back-to-back snowstorms that buried the DC region this winter, electronic journalists provided a vital link between local governments, first responders, and the public. For example, upon realizing that dialysis patients might be marooned, area hospitals turned to broadcast journalists to spread the word that they needed competent drivers of four-wheel drive vehicles to transport patients for this critical treatment. As a result, countless lives were saved. At the request of local fire departments, local broadcasters urged snowbound residents to remove snow from around fire hydrants so that fire

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³⁰ Federal News Radio 1500 AM, <http://www.federalnewsradio.com> (last visited May 5, 2010).

fighters would not have to delay responding to a fire while they uncovered hydrants. Journalists also risked personal injury and ventured out into the severe weather provide viewers with images and reports of the storm. With the storms cutting broadband cables, area residents could still rely on over-the-air broadcasters to convey critical information about the snow emergency.

During the blizzards, radio and television stations often had to preempt local or national advertisements so that they could quickly disseminate critical information. While most area residents were homebound, broadcasters' employees worked around the clock to provide continuous coverage of the unusual event. Broadcasters had to house, feed, and pay employees' overtime for a one-week period. And they did this, not because the government requires them to do so, but because they are committed to serving their local communities.

RTDNA recognizes that some commenters will doubtlessly point to specific instances where a single broadcaster may not have served the public interest to their liking. RTDNA urges the Commission, however, to be leery of justifying additional regulations based on discrete examples of perceived failures. Most broadcasters are good stewards of their licenses and go to great lengths to be reliable, dynamic sources of local news and information.

II. FUNDAMENTAL FIRST AMENDMENT PRINCIPLES CONSTRAIN THE COMMISSION'S ABILITY TO IMPOSE CONTENT-BASED REGULATIONS.

A free and independent press—described as “one of the greatest bulwarks of liberty”³²—is a pillar of our functioning democracy, and its foundation is the First Amendment’s guaranty of the right to communicate and to receive information free from governmental interference. In those limited instances when government regulation of speech can be justified, the government bears the burden of proving that any speech restraints are both necessary and well tailored to its

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³¹ See RTDNA Contests, http://contests.rtdna.org/entries/public_view/1593 (last visited May 7, 2010).

³² *McConnell v. FCC*, 540 U.S. 93, 286 (2003) (Thomas, J., concurring) (quoting the declaration of Rhode Island

purpose. All government agencies have a responsibility to insure that their actions comply with the First Amendment; thus, RTDNA urges the Commission to tread lightly if it establishes policies or proposes new regulations based on this proceeding.

Because of the danger of chilling free speech, governmental regulation of content has always walked a fine constitutional line. As the United States Supreme Court aptly observed, “balancing the various First Amendment interests involved in the broadcast media and determining what best serves the public’s right to be informed is a task of great delicacy and difficulty.”³³ If the First Amendment is to retain its strength as a bulwark against government control of the press, its underpinning—ensuring free and open debate about important local, regional, and national issues—cannot be used to justify government regulation of broadcast content.

Established precedent permits several categorical statements about the Commission’s role in regulating broadcast content. The Commission does not attempt to direct licensees in the selection or presentation of specific material.³⁴ The choice of whether and to what extent to provide local news programming is committed to the broadcaster’s good faith discretion.³⁵ A broadcaster is under no obligation to cover each and every newsworthy event which occurs within a station’s service area,³⁶ and the FCC will not question a broadcaster’s judgment merely because some party expresses the opinion that a particular event should have been covered or reported differently. To do so would contravene the First Amendment.³⁷

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upon the ratification of the Constitution. 1 J. Elliot, *Debates of the Federal Constitution* 335 (1876).

³³ *Columbia Broadcasting Systems, Inc. v. Democratic National Committee*, 412 U.S. 94, 102 (1973).

³⁴ *Stockholders of CBS, Inc.* 11 FCC Red 3733, 3746 (1995).

³⁵ *American Broadcasting Companies, Inc.* 83 FCC 2d 302, 305 (1980).

³⁶ *KSD-TV, Inc.*, 61 FCC 2d 504, 510 (1976).

³⁷ *National Citizen’s Committee for Broadcasting*, 32 FCC 2d 824 (1971); *see also The Selling of the Pentagon*, 30 FCC 2d 150 (1971); *Columbia Broadcasting System (Hunger in America)*, 20 FCC 2d 143 (1969); *Network Coverage of the Democratic National Convention*, 16 FCC 2d 650 (1969).

Inherent in each of these precepts is a notion that determining the manner and scope of news coverage is the broadcaster's prime journalistic function and is therefore a matter far removed from valid FCC supervision. Otherwise, the Commission "would assume a journalistic role totally inappropriate under the First Amendment, for which it lacks any expertise or authority."³⁸ Once a journalist has to stop and consider what a government agency will think of something he or she wants to broadcast, the press's freedom has been lost.

Because of the *Public Notice*'s focus on measuring the availability of local news and information programming as well as quantifying operational trends in broadcasters' newsrooms, RTDNA's members are particularly concerned by the implicit suggestion that it might be appropriate for the Commission to take steps to promote certain types of favored speech—most notably, news and information programming. The First Amendment has always been hostile to such efforts, and RTDNA firmly believes that *any* rule that would dictate to broadcast licensees whether and how to provide local news and information programming—through quotas, mandatory air time, or raised eyebrow regulation—represents an affront to journalistic freedom.

RTDNA recognizes that the broadcast media are protected by a different First Amendment standard than the rest of the population, including the print and online media. As the Supreme Court has repeatedly observed, such scrutiny allows restrictions on broadcaster speech to be upheld "only when . . . narrowly tailored to further a substantial government interest."³⁹ RTDNA submits, however, that any action by the Commission that would impinge on editorial discretion—for example, by requiring broadcasters to air a minimum type, amount, or quality of "news" or other public affairs programming—would not withstand even this lower level of constitutional scrutiny. Indeed, in its most recent and salient pronouncement on

³⁸ *Complaint of American Legal Foundation against CBS, Inc.*, 55 RR 2d 1169 (MMB 1985), *rev. denied* FCC 85-556 (rel. Oct. 18, 1985).

broadcast regulation, the Court stated “the FCC’s oversight responsibilities do not grant it the power to ordain any particular type of programming that must be offered by broadcast stations.”⁴⁰

In the present media environment, the Commission would face a particularly high burden to justify a modification of its deregulation of broadcast content over twenty-five years ago. As the Commission noted in 1983, policies cautioning broadcasters to engage or not to engage in certain programming practices or establishing rigid guidelines in relation to such programming “raise fundamental questions concerning the constitutional rights and editorial freedom of broadcast licenses,” and therefore cannot be retained in the absence of a “clear and compelling showing” that the public interest demands their retention.⁴¹ As the 2010 Survey demonstrates, and as broadcasters in this proceeding will doubtlessly prove, the television and radio broadcast industry has not starved the public of local news and information programming. To the contrary, over the past several years, broadcasters have consistently devoted additional airtime to local news and information programming. Accordingly, in this context, it is impossible for the Commission to make a “clear and compelling showing” of a substantial governmental interest that would be furthered by imposing additional content regulation on broadcasters. Doing so would instead require the Commission to enter “‘an impenetrable thicket’ of reviewing editing processes and adjudging editorial judgment . . . a function inconsistent with the First Amendment and with the national commitment to the principle that debate on public issues should be ‘uninhibited, robust, [and] wide open.’”⁴²

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³⁹ *FCC v. League of Women Voters of California*, 468 U.S. 364, 380 (1984).

⁴⁰ *Turner Broadcasting Sys. v. FCC*, 512 U.S. 622, 650 (1994).

⁴¹ *Elimination of Unnecessary Regulations*, 54 RR 2d 1043, ¶¶ 9-10 (1983).

⁴² *In re Application of WGPR, Inc. and CBS, Inc.* 10 FCC Rcd 8140, 8147 (1995) (quoting *New York Times Co. v. Sullivan*, 376 U.S. 254, 270 (1964)).

An attempt to inject the federal government and its regulatory system into broadcasters' newsrooms would not be a well-justified, narrowly tailored exercise of power but a mischievous and misguided undertaking. There should not be governmental policies to govern how any form of local news is communicated through the electronic media. Such an approach would be particularly offensive to the First Amendment's guarantee of a free press; the First Amendment does not countenance a governmental assessment of whether broadcasters are airing sufficient quantities of "news." Even when there exists a government interest and the government has chosen the most narrowly tailored means to further that interest, government is forbidden from censoring content or otherwise dictating categories of programming broadcasters must or must not show. A free and independent press is too important for the Commission to make it a burnt offering to the vocal few who disagree with what broadcasters chooses to air in their nightly newscasts.

While this proceeding itself raises no particular proposals, certainly the discussion that has surrounded the Commission's inquiries (as well as those of the Federal Trade Commission) about the "future of media" and what is or is not working in the area of news and information has included suggestions as to how the government can resolve what has been characterized as a "crisis" or "contraction" in journalism. Again, integrating the government and the press is intolerable under the First Amendment. The notion of government subsidies, even when cast as content neutral, raises the specter that reporting on government misdeeds would be dampened, stories unduly influenced or killed, and suggests that the government has an appropriate role in deciding which "journalists" would be entitled to such funding. Further, such action would undoubtedly further erode public trust. New taxes on broadcast spectrum, onerous recordkeeping and reporting requirements, and meaningless obligations imposed in the name of

“localism” would serve only to divert resources from local beat reporters, investigative journalism, enterprise reporting, national and foreign bureaus, new and better technology—all of which the Commission ostensibly seeks to foster and protect. The government can best advance quality journalism through openness and transparency, and by forbearing from regulation that will diminish available resources or otherwise stifle independent editorial decision making and the free flow of information.

III. CONCLUSION

RTDNA urges the Commission to refrain from imposing new regulations on broadcasters under the auspices of promoting the dissemination of news and information. The government should stand aside as journalism organizations experiment and innovate with new technologies, business models, and multimedia platforms. As demonstrated herein, the sky is not falling; broadcast journalists are adapting and offering an abundance of local news and information how and when consumers want it. The Commission should not accede to calls from those who would have the government tell the public what is best for them or who would integrate the government and the press. That would deal a far greater blow to our democracy than any perceived contraction in journalism.

Respectfully submitted,

RADIO TELEVISION DIGITAL NEWS
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EXHIBIT A
2010 RTDNA/Hofstra Survey

How the business of TV news is changing:

The survey numbers show how much the business is changing

by Bob Papper

The latest RTDNA/Hofstra University Survey shows how much the TV business model is changing. There's much less evidence of fundamental change in radio, but the evolution of strategies, priorities and news outlets in TV make clear that the TV business of today is a far cry from the television industry of just a few years ago.

TV news departments are providing content over more outlets than ever before.

Percentage of TV News Departments Providing Content to Other Media – 2010

	Another local TV station	TV in another market	Cable TV channel	Local radio	Website not your own	Mobile device	Other
All TV	32.7%	13.8%	10.7%	52.0%	13.8%	44.9%	13.8%
Big four affiliates	33.5	12.5	9.7	52.8	12.5	46.0	14.8
Other commercial	23.5	23.5	23.5	35.3	29.4	41.2	5.9
Market size:							
1-25	38.9	13.9	16.7	44.4	22.2	55.6	19.4
26-50	22.7	18.2	0	63.6	9.1	50.0	9.1
51-100	26.2	13.1	11.5	49.2	14.8	50.8	21.3
101-150	45.2	11.9	4.8	59.5	7.1	31.0	4.8
151+	28.6	14.3	17.1	48.6	14.3	37.1	8.6

This table is where you see that TV stations are not simply in the TV business – at least not just at their own stations. Nearly a third (32.7%) of TV news directors say that they run local news on another local or nearby station. That's about the same as last year, and the percentage of stations running news on a cable channel is down slightly. But all other categories are up.

“Mobile devices” is a new entry in this year's survey. Last year, it showed up under "other," but even if all of last year's "other" was mobile -- and it wasn't -- this year's figure would still represent a doubling in the last year. This year, "other" choices were spread over a wide range of activities, but the two most common were running material on one of the station's other digital channels and some sort of joint effort with a newspaper.

Stations are heavily involved in cooperative ventures with others. The table above deals with stations supplying news to other media. The next table deals with cooperative ventures among media outlets.

Aside from the local or nearby TV station for which you produce news, do you have a cooperative news gathering or coverage agreement with the following?

	Another TV station	Local newspaper	Local radio station	Other	No
All TV Market	23.6%	23.6%	27.7%	4.0%	38.6%
1 - 25	41.3	22.2	22.2	9.5	30.2
26 - 50	22.7	27.3	22.7	2.3	38.6
51 - 100	18.5	33.7	33.7	6.5	30.4
101 - 150	13.1	19.0	29.8	0	50.0
151+	28.6	14.3	25.4	1.6	42.9

Overall, more than 60 percent of stations say they're involved in some sort of cooperative news gathering or coverage agreement with another medium. Interestingly, stations in smaller markets are a little less likely to be involved in cooperative agreements than stations in larger markets. Stations with larger staffs, 31 and bigger, are also more likely to be involved in cooperative agreements than smaller operations.

ABC affiliates are a little less likely to be involved in these agreements than other affiliates. Otherwise, there were no meaningful differences by subset.

For those stations that are involved with cooperative agreements, we asked what they were sharing.

	Information	Helicopter	Pool video	Other
All TV	32.3%	4.0%	15.0%	8.4%

Market				
1 - 25	30.2	19.0	33.3	7.9
26 - 50	31.8	2.3	15.9	9.1
51 - 100	44.6	1.1	13.0	10.9
101 - 150	22.6	0	2.4	7.1
151+	30.2	0	15.9	6.3

Generally, the larger the staff, the more likely that the station is sharing information, a helicopter, pool video and other. NBC and Fox affiliates are a little more likely than others to be sharing information; Fox and CBS stations were more involved with pool video; CBS stations were more involved in the other category. Stations in the Northeast were a little less likely to be involved in sharing information but more likely to be involved in sharing a helicopter and pool video.

The "other" category was all over the place. Various forms of shared content showed up most often with shared staff members coming in second.

For stations not involved in cooperative arrangements, we asked whether they were planning or discussing one. More than a quarter (28.6%) said yes. Most were in the three middle (26 – 101) market groups. This group was much less likely to include ABC affiliates and a little more likely to be in the Northeast or West.

More and more stations are running more and more stations – digital ones. And news departments are more and more likely to be involved in what airs on those other outlets.

Stations running material on another digital channel that news director oversees

	All news channel	Weather channel	Other	No
All TV	4.1%	22.2%	22.2%	46.6%
Market:				
1 – 25	6.1	14.3	14.3	57.1
26 - 50	3.2	32.3	19.4	32.3
51 - 100	5.3	25.0	22.4	43.4
101 - 150	4.9	24.6	13.1	55.7

151+	0	16.7	41.7	39.6
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So what's "other"? Seventeen news directors noted another TV station that they're running on a second (or third) digital channel. A dozen noted news programming -- just not all news. Seven noted weather radar. Four said informational programming, and four noted sports. Three said traffic; two said programming in another language; and one noted movies.

And plenty of news directors not already involved with another digital channel (or two) expect to be involved with it (or them) in the next year.

Plans for 2010 on another digital channel that news director oversees

	All news channel	Weather channel	Other	No
All TV	4.9%	14.7%	14.7%	54.5%
Market:				
1 - 25	8.2	10.2	8.2	59.2
26 - 50	9.7	12.9	12.9	38.7
51 - 100	5.3	22.4	22.4	51.3
101 - 150	1.6	9.8	8.2	60.7
151+	2.1	14.6	16.7	58.3

Beyond news and weather, what are the plans? Seven news directors noted another station. Six said more news -- but not all news. Six also said they weren't sure. Four wouldn't say; two each said information or miscellaneous programming; one said foreign language programming.

Two-thirds of TV stations say they have a 3-screen approach to news.

Stations and a 3-screen -- on air, online, mobile -- approach to news

	Yes	No
All TV	68.8%	31.2%
Market:		
1 - 25	76.2	23.8
26 - 50	80.0	20.0
51 - 100	74.6	25.4

101 - 150	61.7	38.3
151+	56.6	43.5

Generally, the larger the market, the more likely that the station has a 3-screen approach to news. NBC affiliates were more likely than other affiliates to have a 3-screen approach, and ABC affiliates were a little less likely than others to have one. Stations in the West were less likely than the rest of the country to have a 3-screen approach.

Almost all stations ranked the order of importance as: on air, followed by online, followed by mobile. However, NBC affiliates were a little more likely to place more importance online, and Fox affiliates were a little more likely to emphasize mobile, but both of those variances were small.

TV and Radio and Social Media

Of course, the number of social networking initiatives soared since last year.

What is your TV station doing with social networking? 2010

	Covering the topic in newscasts	Incorporating it into storytelling	Integrating it on the website	Nothing
All TV	66.9%	58.3%	76.3%	8.6%
Market size:				
1-25	71.4	65.3	67.3	10.2
26-50	74.2	64.5	80.6	3.2
51-100	75.0	65.8	85.5	5.3
101-150	50.8	55.7	68.9	13.1
151+	66.7	39.6	77.1	10.4
Staff size:				
51+	81.7	74.6	87.3	1.4
31 – 50	67.7	69.4	82.3	8.1
21 – 30	66.0	51.1	74.5	10.6
11 – 20	53.7	34.1	56.1	17.1
1 – 10	30.8	23.1	53.8	38.5

Other than, perhaps, mobile devices, nowhere in the survey do we see more difference from last year than in what stations are doing in social media. A year ago, almost 36 percent said they were doing nothing with social media. This year, that number is below 9 percent. Everything went up and went up substantially. Just about double in most cases.

Neither geography nor network affiliation made any meaningful difference.

Stations offered 157 examples of what they were doing with social media. Most talked about interacting with viewers and using Twitter (124 noted), Facebook (116 noted) and MySpace (8 noted) to promote newscasts or station activity. Several dozen also noted using Twitter, Facebook and the station website to help develop tips, story leads and contacts. Most of the stations said that most reporters and many of the anchors tweeted, and quite a few stations said that not only did they have a Facebook page, but so did individual newscasts. More than a dozen news directors noted efforts to get viewer feedback and comments, and several also noted requests for viewer pictures. Seven news directors talked about staff members who blog, and three noted live chats for viewer feedback.

Percentages add up to more than 100 percent because news directors could check all that apply.

Does the station or newsroom have a Facebook page?

	Station only	Newsroom only	Both	No
All TV	19.9%	39.1%	27.1%	13.9%
Market				
1 - 25	8.2	36.7	34.7	20.4
26 - 50	12.9	35.5	35.5	16.1
51 - 100	26.3	43.3	25.0	5.3
101 - 150	24.6	37.7	21.3	16.4
151+	20.8	39.6	22.9	16.7
Staff size				
51+	46.2	23.1	15.4	15.4
31 - 50	31.7	29.3	9.8	29.3
21 - 30	12.8	46.8	19.1	21.3
11 - 20	17.7	41.9	35.5	4.8
1 - 10	16.9	39.4	38.0	5.6

Note that having one or more Facebook pages is not a function of market size or staff size, although market and staff sizes do appear related to the approach the station takes to Facebook. Bigger markets and smaller staff sizes appear more likely just to have station Facebook pages. Network affiliation made no difference, other than a lower rate of Facebook involvement for non-network affiliates. Geography made relatively little difference, although stations in the Northeast were a little less likely to be involved in Facebook than others.

Is the newsroom actively involved with Twitter?

	Constantly	Daily	Periodically	No
All TV	36.1%	35.3%	16.1%	12.5%
Market				
1 - 25	32.6	34.8	17.4	15.2
26 - 50	32.1	42.9	17.9	7.1
51 - 100	50.7	38.4	11.0	0
101 - 150	30.0	30.0	20.0	20.0
151+	27.7	34.0	17.0	21.3
Staff size				
51+	46.4	39.1	14.5	0
31 - 50	41.0	37.7	16.4	4.9
21 - 30	35.6	40.0	11.1	13.3
11 - 20	25.6	25.6	23.1	25.6

1 - 10	0	15.4	7.7	76.9
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Involvement with Twitter is less a function of market size -- at least directly -- than staff size. The bigger the station, the more likely that the newsroom will be involved with Twitter ... and the more likely that it will be more involved with Twitter.

Radio and Social Networking

Clearly, radio news is lagging way behind TV in social networking.

What is your radio station doing with social networking? 2010

	Covering the topic in newscasts	Incorporating it into storytelling	Integrating it on the website	Nothing
All Radio	15.8%	9.9%	26.6%	61.1%
Market size:				
Major	25.8	19.4	32.3	61.3
Large	10.3	3.5	27.6	69.0
Medium	13.7	11.0	27.4	57.5
Small	15.9	7.3	21.7	62.3

The results on social networking depend a lot less on market size and a lot more on how many news people the station has. The big jump in social networking came with stations with three or more news people. Group-owned stations were noticeably more likely to be involved in social networking than independent stations.

Radio station news directors offered 45 examples of what they're doing. More than half noted both Facebook and Twitter. Just a few noted blogs and MySpace.

Does the station or newsroom have a Facebook page?

	Station only	Newsroom only	Both	No
All Radio	58.1%	0.9%	4.3%	36.8%
Market				
Major	68.4	0	5.3	26.3
Large	50.0	0	16.7	33.3
Medium	75.0	0	0	25.0
Small	43.2	2.3	2.3	52.3

There were no consistent differences based on staffing, number of stations or ownership.

Is the newsroom actively involved with Twitter?

	Constantly	Daily	Periodically	No
All Radio	7.0%	7.0%	13.4%	72.5%
Market				
Major	26.3	0	10.5	63.2
Large	5.3	5.3	10.5	78.9
Medium	4.3	15.2	8.7	71.7
Small	3.5	3.5	17.5	75.4

Overall, there was far less use of Twitter in radio than TV. Stations with large staffs were more likely to use Twitter, as were group-owned stations, but the vast majority in all cases used Twitter sparingly if at all.

Only one radio station in six (16.7 percent) said it was doing anything involving convergence. Non-commercial and stations with larger staffs were more likely to say yes.

Most common examples cited: efforts on the station's web site; working with a local TV station; working with a local newspaper; then a tie between mobile applications and public radio consortiums.

TV and Radio on the Web

TV and radio stations are not paying less attention to the web

Who Has Web Sites? 2010

All TV	99.7%	All Radio	96.7%
Market Size		Market Size	
1 - 25	100.0	Major	100.0
26 - 50	100.0	Large	100.0
51 - 100	100.0	Medium	97.8
101 - 150	98.8	Small	93.5
151+	100.0		

Station web sites are nearly universal, but we found a TV station -- a Fox affiliate in the Midwest -- that said no, it didn't have one.

Radio rose slightly from a year ago, with all large and major market stations (that run local news) with a web site.

Major markets are those with 1 million or more listeners. Large markets are from 250,000 to 1 million. Medium markets are 50,000 to 250,000. Small markets are fewer than 50,000.

How Many Web Sites Include Local News? 2010

All TV	98.1%	All Radio	72.2%
Market Size		Market Size	
1 - 25	97.9	Major	53.3
26 - 50	100.0	Large	71.4
51 - 100	98.6	Medium	76.7
101 - 150	95.1	Small	73.8
151+	100.0		

In TV, as in the past, only the newsrooms with the smallest staffs don't include local news. Radio numbers remained largely unchanged from a year ago.

Elements of Local News Web Sites 2010

TV	Text	Still Pics	Audio	Strmng Audio	Live Cam	Nws Vid	Live Nwscsts	Rcrded Nwscsts	Blogs	Pdcsts	Assmble Own Nwscsts	Other
All TV:	94.9%	94.5%	65.2%	33.2%	61.3%	96.9%	35.9%	37.5%	69.9%	10.2%	2.7%	9.0%
Markets 1	93.5	84.8	69.6	43.5	69.6	97.8	39.1	28.3	71.7	6.5	2.2	6.5

- 25												
Markets 26 - 50	90.0	96.7	70.0	50.0	83.3	96.7	43.3	33.3	90.0	26.7	3.3	10.0
Markets 51 - 100	95.9	98.6	76.7	43.8	60.3	97.3	47.9	37.0	74.0	16.4	5.5	8.2
Markets 101 - 150	96.6	96.6	55.2	17.2	55.2	96.6	32.8	31.0	60.3	3.4	1.7	8.6
Markets 151+	97.9	95.8	54.2	16.7	50.0	97.9	14.6	56.3	62.5	2.1	0	12.5

Radio	Text	Still Pics	Audio	Strmng Audio	Live Cam	Nws Vid	Live Nwscsts	Rcrded Nwscsts	Blogs	Pdcsts	Other
All Radio:	87.5%	51.0%	55.8%	41.3%	2.9%	11.5%	9.6%	21.2%	20.2%	23.1%	2.9%
Major Market	92.3	76.9	61.5	46.2	0	23.1	23.1	38.5	30.8	53.8	15.4
Large Market	92.9	35.7	64.3	42.9	14.3	14.3	14.3	14.3	28.6	21.4	0
Medium Market	86.5	40.5	48.6	37.8	2.7	10.8	2.7	13.5	16.2	24.3	2.7
Small Market	84.6	56.4	59.0	43.6	0	7.7	10.3	25.6	17.9	12.8	0

We appear to see a maturing of the web sites, especially in TV. Text, still pictures and news video are now essentially universal on TV web sites. The use of audio, live cameras, recorded newscasts and blogs all went up noticeably. But a number of areas either leveled off or fell: streaming audio, podcasts and assemble your own newscasts. Recorded newscasts edged up slightly, but the numbers suggest that, more and more, stations are deciding that certain web elements aren't working that well for them -- or aren't worth the effort -- and they're either scaling them back or not bothering with them at all. Allowing the audience to assemble their own newscasts actually peaked at around 10 percent a few years ago ... and has edged down ever since. Consistent with past results, the largest stations tend to have the most complex web sites. There are no meaningful distinctions based on network affiliation or geography, although PBS affiliates have far less complex web sites than their commercial counterparts.

Most of the radio numbers are pretty close to last year's. The exceptions include audio, streaming audio and blogs -- all of which went up. Still pictures and news video both dropped slightly. Although we list the radio subset of market size, that actually has little to do with the complexity of radio websites today. The key determinant of complexity is how many people work in news. The consistent jump in website complexity comes when a station or group has at least three people in news.

What Do Users Want From the Station Web Site?

Rank	All TV - 2010	All TV - 2009	All Radio - 2010	All Radio - 2009
1	Local weather	Local news	Local news	Local weather
2	Local news	Local weather	Local weather	Local news
3	Other information	Local sports	Local sports	International news
4	Headlines	Headlines	Other information	National news
5	Local sports	National news	Weather elsewhere	Headlines
6	National news	Bios of on air talent	National news	Sports elsewhere
7	Health	Other information	Entertainment news	Consumer news
8	Weather elsewhere	Entertainment news	Live cameras	Education
9	Consumer news	Health	Bios of on-air talent	Health
10	Entertainment news	Weather elsewhere	Headlines	Bios of on-air talent
11	Bios of on-air talent	Consumer news	International news	Entertainment news
12	Education	Traffic	Consumer news	Weather elsewhere
13	Traffic	Live cameras	Sports elsewhere	Live cameras
14	Money	Money	Education	Local sports
15	Live cameras	Education	Food	Food
16	Food	Food	Traffic	Money
17	International news	Sports elsewhere	Money	Traffic
18	Sports elsewhere	International news	Health	Other

For TV, local weather and local news led the list -- as they always do. "Other information" had never been as high as third place before. Only two other categories moved up or down more than two places: Education rose by three; bios of on-air talent fell by five.

The "other" category really does involve a wide array of choices. Among the top picks: photo galleries, school closings, video, user-generated content, contests and promotions and breaking news.

In radio, local news and local weather took the top two spots. They reversed position, as they

have before. Local sports shot up to number three from last year's surprisingly low number 14. "Other" shot up as well. The most popular "other" included events/community calendar and program schedule, followed closely by contests and promotions and some form of commerce. Others moving up substantially: weather elsewhere, entertainment news and live cameras. Moving down substantially: headlines, international news, consumer news, sports elsewhere, education and health.

How Many People Work on the Web? 2010

	Full-time	Part-time	Total
All TV	2.8	4.5	7.3
Markets 1-25	3.4	2.7	8.3
Markets 26-50	2.7	5.6	8.3
Markets 51-100	2.6	2.4	4.9
Markets 101-150	2.9	4.0	6.9
Markets 151+	2.7	6.6	9.3
All Radio	1.2	1.8	3.0
Major Market	1.3	2.4	3.7
Large Market	1.5	1.9	3.4
Medium Market	1.3	2.0	3.3
Small Market	1.0	1.4	2.4

We compare web staffing – from one year to the next -- in two ways. First, the survey asks news directors to tell us how many full and part timers they have now -- and how many they had the year before. Then we also compare the "now" to what last year's respondents said for "now." Usually, the results are fairly close, but that's not the case this year. This year's respondents reported, overall, that they stayed about the same in web staff in the last year. But if we compare this year's answers to the answers we received last year, then web staffing went up one full time person and one part timer. Different news directors and different stations could account for some of the difference, but all categories and groupings are up over a year ago. Since one comparison is based on memory and the other on count, I suspect that web staffing really did go up noticeably in the last year. Overall, ABC and CBS stations tended to have bigger web staffs than Fox or NBC stations.

In radio, full time web staffing actually dropped slightly, but part time staffing rose some. On balance, radio web staffing rose by about half of a part time person, but that's almost nothing.

There were few differences based on sub-groupings, but group-owned stations tended to have slightly more web staffing than independent stations.

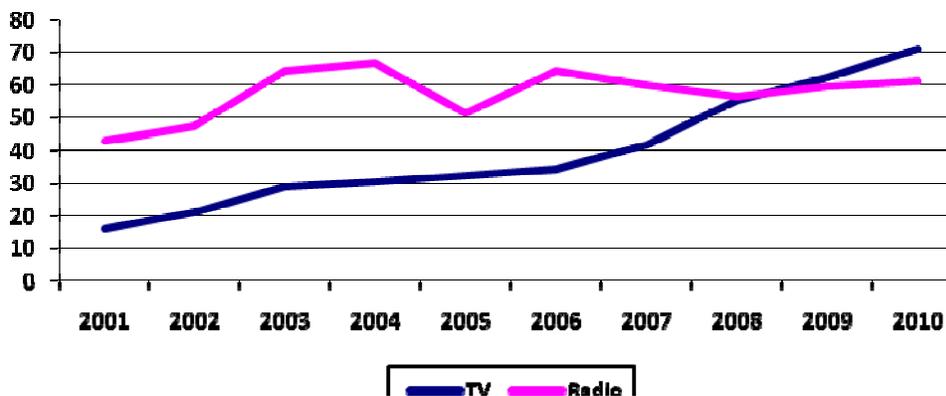
Do Other Staffers Help on the Web? 2010

All TV	70.9%
Markets 1-25	59.7
Markets 26-50	63.9
Markets 51-100	70.5
Markets 101-150	75.7
Markets 151+	79.2
All Radio	61.1%
Major Market	57.3
Large Market	52.8
Medium Market	53.2
Small Market	73.5

Every year, the percentage of staffers working on the web goes up, and this year's number is up more than 10 percent. In fact, every market size except the biggest rose by at least that much; markets 1-25 went up only slightly less. Staffers in the Northeast are a little less likely than elsewhere to help with the web -- as are staffers at Fox affiliates.

The radio numbers are little different from a year ago.

Percentage of stations where staff has web responsibilities 2001-2010



The last decade has seen a nearly straight line up in percentage of TV news staffers who have at

least some web responsibilities. Radio, in contrast, has varied over the years.

News Director Role with the Web Site 2010

	In Charge Overall	In Charge of News Content Only	No Management Role/Other
All TV	22.5%	70.0%	7.5%
Markets 1-25	27.7	59.6	12.8
Markets 26-50	16.7	76.7	6.7
Markets 51-100	20.8	73.6	5.6
Markets 101-150	19.3	73.7	7.0
Markets 151+	28.3	65.2	6.5
All Radio	26.8%	53.6%	19.6%
Major Market	44.4	33.3	22.2
Large Market	27.3	54.5	18.2
Medium Market	12.8	66.7	20.5
Small Market	35.1	45.9	18.9

On the surface, there doesn't appear to be much change in the website management role of news directors from a year ago, but there are actually two striking differences. There was a near doubling of the percentage of Fox news directors who are now in charge of the station's web site overall. At the same time, the percentage of independent news directors who oversee the station's web site plummeted. The two balanced each other out, so the overall numbers appear largely unchanged.

Overall, the radio numbers are little changed from a year ago. Radio news directors are more likely to be in charge overall at independent stations, as they were last year as well.

TV Station Website Traffic During the Past 30 Days

	Page Views (in millions)	Unique Visitors (in thousands)
All TV	4.5	284.8
Market Size		
1-25	7.2	480.8
26-50	16.5	481.2
51-100	3.1	351.0
101-150	1.9	137.2

151+	0.8	75.3
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Total TV page views are way up over a year ago, but unique visitors are up only slightly. The lower numbers for the largest markets appear to be the result of low page views and visitors to some of the smaller independents in the biggest markets.

Too few radio news directors report web traffic, so I still don't consider the numbers to be reliable enough to report.

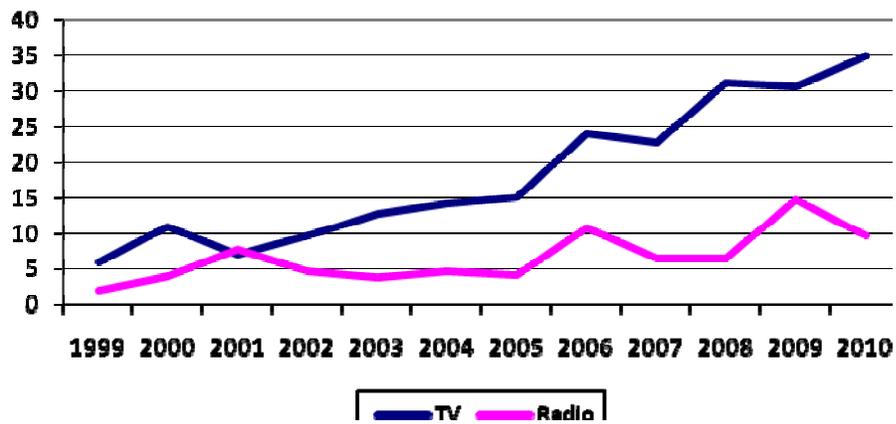
Making Money? 2010

	Profit	Breaking Even	Loss	Don't Know
All TV	35.0%	7.4%	14.4%	43.2%
Markets 1-25	34.1	2.4	14.6	48.8
Markets 26-50	46.4	7.1	17.9	28.6
Markets 51-100	47.1	2.9	14.3	35.7
Markets 101-150	26.8	10.7	8.9	53.6
Markets 151+	21.3	14.9	19.1	44.7
All Radio	9.7%	11.7%	15.5%	63.1%
Major Market	8.3	0	8.3	83.3
Large Market	0	25.0	25.0	50.0
Medium Market	15.4	10.3	15.4	59.0
Small Market	7.7	10.3	15.4	66.7

These may be tough economic times, but TV station web sites have continued to climb in profitability -- up 4.3 percent in the last year. A sizeable percentage of news directors still don't know the answer. The bigger the staff, the more likely that the web site makes a profit. The profitability numbers run from a low of 8.3 percent at the smallest staff sizes straight up to 50% at the biggest stations. For whatever reason, news directors at ABC affiliates are less likely to know about web profitability than other news directors.

Radio web sites didn't fare as well as TV. The percentage making a profit and breaking even both fell, although modestly. The percentage losing rose. Nearly two-thirds of radio news directors didn't know whether the web site made a profit. Web sites at group-owned stations tended to do better than independents.

Profitability of station websites over time



Note that over the past decade, TV has gone almost steadily up in profitability even as radio has generally moved up and down.

TV and radio technology

Percentage of stations broadcasting local news in high definition

	Percent Yes
All TV	33.1%
Market:	
1 - 25	67.4
26 - 50	65.5
51 - 100	23.3
101 - 150	20.0
151+	10.4

The critical distinction is market size, with two-thirds of the top 50 markets already running local news in HD and all other market sizes below one-quarter. There's no meaningful difference by geography, but ABC affiliates in the survey were a little less likely to broadcast local news in HD than other affiliates.

A quarter of those who said they were not already broadcasting local news in HD said they planned to do so this year. Again, the bigger the market, the more likely they were to say yes to this year. Forty percent of the news directors in top 25 markets said yes to this year if they weren't already doing it. That dropped to 15 percent for markets 151+.

In radio, we asked -- as we have in the past -- about the use of digital technologies in news gathering. Digital technology use in radio news has continued to edge up.

Which of the following technologies are you using for news?

	Digital audio recording	Digital editing & mixing	Digital or cell phones	Field laptops for editing	MP3
All radio	62.6%	54.2%	39.4%	12.3%	50.7%
Market					
Major	58.1	48.4	32.3	19.4	41.9
Large	55.2	37.9	31.0	17.2	41.4
Medium	63.0	57.5	39.7	9.6	43.8
Small	66.7	59.4	44.9	10.1	65.2

Overall, the numbers didn't change much between commercial and non-commercial, number of staff or stations, group ownership or region.

Percentage of news material...

	Gathered digitally	Mixed & edited digitally	Played back or aired digitally

All radio	76.6%	80.9%	82.5%
Market			
Major	89.4	88.1	93.1
Large	93.1	87.7	85.9
Medium	74.4	78.3	81.8
Small	70.2	78.1	77.6

Non-commercial stations were more likely to be more digital. So were bigger stations and stations in the Northeast. Number of stations or group ownership made no difference.

Bob Papper is the Lawrence Stessin Distinguished Professor of Journalism and chair of the Department of Journalism, Media Studies, and Public Relations at Hofstra University and has worked extensively in radio and TV news. This research was supported by the School of Communication at Hofstra University and the Radio Television Digital News Association.

About the Survey

The RTDNA/Hofstra University Survey was conducted in the fourth quarter of 2009 among all 1,770 operating, non-satellite television stations and a random sample of 4,000 radio stations. Valid responses came from 1,355 television stations (76.6 percent) and 203 radio news directors and general managers representing 301 radio stations.

Some data sets (e.g. the number of TV stations originating local news, getting it from others and women TV news directors) is based on a complete census and is not projected from a smaller sample.

One-Man-Bands 2010 Update

The talk about using one-man-bands has soared over the last few years – but it’s more talk than action. Actual use has risen only modestly.

Because of all the talk about the increasing use of one man bands, we added the question to the RTNDA/Hofstra University Survey in 2007 ... and followed up both last year and again this year.

Percentage of TV Newsrooms Reporting Using One-Man-Bands

	Yes, Mostly Use OMB	Yes, Use Some OMB	Yes, But Not Much Use	No, Do Not Use
All TV	31.7%	29.0	21.0	18.3
Market size:				
1-25	14.9	23.4	23.4	38.3
26-50	6.5	22.6	32.3	38.7
51-100	18.9	41.9	25.7	13.5
101-150	45.9	23.0	18.0	13.1
151+	66.7	27.1	6.3	0
Staff size:				
51+	8.5	28.2	32.4	31.0
31-50	24.6	34.4	21.3	19.7
21-30	53.2	25.5	14.9	6.4
11-20	65.0	22.5	10.0	2.5
1-10	69.2	23.1	0	7.7

In the last three years, the use of one man bands has increased but certainly not skyrocketed. Three years ago, 22.3 percent of stations said they mostly used one man bands. Today, that percentage is up to 31.7 percent. The stations reporting some use of one man bands edged up from 26.9 percent to 29.0 percent. The “not much” category slid from 22.3 percent to 21.0 percent, and the “do not use” group dropped 10 points from 28.6 percent to 18.3 percent. Most of the growth in the use of one man bands from 2007 to 2010 came in the smallest markets and at the smallest newsrooms. Only 8.5 percent of the largest newsrooms – 51 or more employees – say they mostly use one-man-bands.

Use of One-Man-Bands in the News Department Last Year Compared to the Year Before

	Used More	Used Less	About the Same
All TV	11.9%	28.7%	59.4%
Market size:			
1-25	10.3	28.2	61.5
26-50	7.4	29.6	63.0
51-100	9.7	33.3	56.9
101-150	12.3	33.3	54.4
151+	18.8	14.6	66.7
Staff size:			
51+	10.4	25.4	64.2
31-50	20.7	31.0	48.3
21-30	10.6	31.9	57.4
11-20	11.1	30.6	58.3
1-10	0	15.4	84.6

The comparative table is interesting. Used more last year is up slightly from three years ago, but it's actually down a little from a year ago. Used less is almost double the figure from a year ago, and more than two and a half times the number from three years ago. The same won, overall, by a large margin, but 59.4 percent is down from last year's 70 percent. But all of the difference and more went into using one-man-bands less than the year before.

Expected Use of One-Man-Bands in the News Department Next Year

	More	Less	About the Same
All TV	43.1%	0.4%	56.5%
Market size:			
1-25	39.0	0	61.0
26-50	46.4	0	53.6
51-100	51.4	0	48.6
101-150	43.1	1.7	55.2
151+	31.3	0	68.8
Staff size:			
51+	49.3	0	50.7
31-50	54.4	0	45.6
21-30	38.3	0	61.7
11-20	33.3	2.6	64.1
1-10	15.4	0	84.6

This is where we see the biggest change, with expect to use more up from 27.7 percent three

years ago to 43.1 percent this year. All of that growth came from “about the same” with “less” use remaining close to the same. But a word of caution in interpretation. These are close to the same numbers we had the year before, and the actual growth of one-man-bands was far more modest than the expectation.

TV Staffing and News ... 2010
by Bob Papper

The RTDNA/Hofstra University Annual Survey found that 2009 meant another year of TV news doing more with less. All told, 400 people in local TV news lost their jobs – 1.5 percent of the local TV workforce. A bad year, but not nearly as bad as the year before, when 1,200 people lost jobs in TV news (4.3 percent of the workforce).

Even as staffing fell, the amount of news on the average station rose -- again -- to a record high 5 hours per weekday.

We started 2009 with 770 TV stations originating local news ... and running that news on those stations and another 205 ... for a total of 975 stations. All told, we started 2010 with 762 stations originating local news ... and running it on those stations and another 224 ... for a total of 986 stations. Only one network affiliate simply dropped local news completely in 2009.

The best news in this year's survey may be hidden in the answer to the question about planned staff changes this year. In a dramatic turnaround from a year ago, over 60 percent of TV news directors say they expect staffing levels to stay the same. That's up nearly 20 points from a year ago. The number expecting a decrease in staffing dropped 77 percent from a year ago, and the percentage expecting an increase in staff went up by 145 percent.

Hours of Local TV News per Day – 2010

	Average weekday	Weekday maximum	Average Saturday	Saturday maximum	Average Sunday	Sunday maximum
All TV news	5.0	48.0	1.7	7.0	1.6	6.0
Big four affiliates	5.2	48.0	1.7	7.0	1.7	6.0

Other commercial	3.8	11	1.2	4.0	1.2	4.0
Market size:						
1-25	4.9	10.0	2.5	7.0	2.4	6.0
26-50	8.0	48.0	2.5	5.0	2.5	5.0
51-100	5.3	30.0	1.7	5.0	1.7	5.0
101-150	4.1	11.0	1.2	3.0	1.1	3.0
151+	3.7	15.0	0.9	3.0	0.9	3.0
Staff size:						
Staff 51+	7.2	48.0	2.5	7.0	2.6	6.0
Staff 31-50	4.5	11.0	1.5	4.0	1.4	4.0
Staff 21-30	4.4	15.0	1.0	3.0	0.9	2.0
Staff 11-20	3.5	23.0	0.8	2.0	0.7	2.0
Staff 1-10	1.2	2.0	0.3	1.0	0.3	1.0
Affiliation:						
ABC	4.8	30.0	1.5	6.0	1.6	6.0
CBS	5.3	48.0	1.7	5.0	1.5	5.0
Fox	6.1	30.0	1.5	5.0	1.5	5.0
NBC	5.5	35.0	2.0	7.0	2.0	6.0
PBS	1.6	6.0 -	0	0	0.3	1.0

For those who might have thought last year's jump in the amount of news on TV was an anomaly, this year's numbers prove that last year's were no fluke. Most stations were unchanged from last year, but where there were changes, the numbers almost always rose again, and the overall average amount of weekday news per station went up another 24 minutes from last year to an even 5 hours. That is, for the second year in a row, the highest average amount ever. Saturday remained the same at 1.7 hours while Sunday slipped 6 minutes to 1.6 hours.

For weekday news, every market size category stayed the same or rose; every staff size category rose except the very smallest newsrooms, which dropped slightly. Every network affiliate group went up -- even PBS stations. The weekend was virtually the same across the board.

The maximum amount of news produced more than doubled to 48 hours a day for one

station. That can happen because of all the stations producing news for other stations.

Changes in newscasts in the past year

	Added a newscast	Cut a newscast	No changes
All TV news	28.6%	13.7%	57.7%
Big four affiliates	28.2	12.5	59.3
Other commercial	42.9	18.2	38.9
Market			
1 – 25	39.6	20.8	39.6
26 – 50	22.6	16.1	61.3
51 – 100	41.9	13.5	44.6
101 – 150	19.7	10.0	70.3
151+	12.5	8.3	79.2
Staff size			
51+	43.7	15.5	40.8
31 – 50	29.5	6.6	63.9
21 – 30	19.1	4.3	76.6
11 – 20	12.5	25.6	61.9
1 – 10	0	23.1	76.9

More than twice as many stations reported adding a newscast as cutting one. Every market size reported more added than cut, but the biggest markets and the largest staff sizes were most likely to see increases. The percentage cut rose by almost 5 percent from a year ago, but all of that came out of the "no changes" category. The percentage adding news was virtually identical to a year ago.

Fox affiliates were more likely to add news than others, but there were no other differences on the plus side by affiliation or geography. Fox stations were a little less likely to cut news than other affiliates, and CBS stations were a little more likely to cut than the others.

Stations that added newscasts added them all across the day. Sunday came in first, split evenly between morning and evening. Right behind that was early evening, 5 pm - 7 pm. Then additions in the 7 am - 10 am area, mainly driven by Fox affiliates. Right behind that, in a three-

way tie, were 10 pm - 11 pm newscasts, 10 am - 12 noon newscasts and early morning additions, prior to 6 am. Just behind that was Saturday, again split between morning and evening. Noon to 2 pm newscasts came next, followed closely by 4 pm and 7 pm. Then it's just random newscasts at various other times.

Stations that cut newscasts overwhelmingly made cuts on the weekends -- both morning and evening. Way behind that were a few stations that cut in the 7 am - 9 am, noon to 2 pm and 5 pm - 7 pm area. Beyond that, it was just a scattered few cuts.

Amount of News Changes ... the past year

	Increase	Decrease	Same
All TV News	30.2%	11.8%	58.0%
Big four affiliates	29.8	10.8	59.3
Other commercial	50.0	8.3	41.7
Market size:			
1-25	33.3	19.0	47.6
26-50	22.0	12.2	65.9
51-100	37.9	8.0	54.0
101-150	33.7	10.8	55.4
151+	17.5	11.1	71.4

As with last year, most stations reported staying the same in amount of news. In fact, the percentage is the same as last year. Nearly three times as many stations reported increasing the amount of news as opposed to decreasing news, but the percentage of those decreasing went up 5 percent from a year ago.

Again, Fox affiliates were more likely to report gains, and CBS affiliates a little more likely to report cuts.

Amount of News Planned ... the next year

	Increase	Decrease	Same	Not sure
All TV news	32.6%	1.8%	57.4%	8.2%

Big four affiliates	31.6	1.7	57.9	8.8
Other commercial	50.0	0	41.7	8.3
Market size:				
1-25	34.9	1.6	54.0	9.5
26-50	26.2	4.8	59.5	9.5
51-100	32.6	1.1	56.2	10.1
101-150	34.9	1.2	56.6	7.2
151+	30.6	1.6	62.9	4.8

The percentage of news directors expecting to increase the amount of news this year is up 9 percent from the year before. The percentage expecting a decrease -- which was already small -- dropped in half. Even the percentage saying they were unsure fell by about a quarter.

The numbers are surprisingly consistent across a variety of breakouts although, once again, Fox affiliates are more likely than others to expect to increase the amount of news.

Almost one-third (31.5 percent) of all TV stations now produce news that's run on another local or nearby TV station. Interestingly, other than markets 26 - 50, which is smaller, close to the same percentage of stations in each market group are about as likely to run news on another station. The same is true for staff size. Other than the smallest staff size, 1 - 10, the other percentages are pretty close. CBS affiliates are a little more likely to run news on another station, and Fox affiliates are a little less likely, and stations in the Northeast are a little more likely to run news on another station as compared to other areas.

TV news Staffing and Profitability

TV Staff Size – 2010

	Avg full-time	Median full-time	Maximum full-time	Avg part-time	Median part-time	Maximum part-time	Avg total staff	Median total	Maximum total staff
All TV	34.5	29.0	130	5.3	2.0	156	38.3	32.0	172
Big four affiliates	37.0	31.0	130	5.5	2.0	156	40.9	34.0	172
Other commercial	21.2	18.0	64	4.3	3.0	16	24.1	18.5	68
Market size:									
1-25	54.8	63.5	130	9.2	3.5	72	61.3	67.0	161
26-50	50.6	57.0	92	4.7	3.0	16	52.6	57.0	103
51-100	36.8	36.0	80	3.9	2.0	18	39.1	40.0	80
101-150	26.5	26.0	46	6.3	1.0	156	31.4	28.0	172
151+	18.1	19.0	47	3.7	2.0	45	20.8	20.0	66

This past year represents another down year for staffing -- although not as bad as 2008.

In 2008, 1,200 TV news jobs were lost. In 2009, another 400 jobs disappeared. That's a drop of 1.5 percent.

Overall, the smaller markets, 100+ held steady, while the biggest markets, 1 - 25, got hit the hardest. Of course, stations there had larger staffs to begin with.

People should not confuse the decrease in total staffing with the idea that no one is being hired in local TV news. The typical TV station hired three people last year -- all of which replaced people who had left. In other words, there are still a fair number of people moving from job to job or moving into the field. The average station hired 3.7 replacements and 0.6 new positions. Stations in the Northeast were less likely to be hiring than stations throughout the rest of the country.

Staff Size Changes ... the past year

	Increase	Decrease	Same	Don't know
All TV news	11.5%	64.1%	24.1%	0.3%

Big four affiliates	11.4	64.0	24.2	0.3
Other commercial	15.2	60.6	24.2	0

Nearly two-thirds of TV news directors reported staff cuts last year. That's an even higher percentage than the year before -- although fewer positions were cut than a year ago. The percentage of news directors reporting staff increases went down 4 percent from the year before. The numbers were fairly constant across all subsets, although CBS and NBC affiliates were less likely to increase staff size than others, and stations in the Northeast were, generally, more likely to be hit with layoffs.

Planned Staff Changes ... the next year

	Increase	Decrease	Same	Not sure
All TV news	22.7%	7.1%	60.8%	9.4%
Big four affiliates	23.0	7.8	60.8	8.4
Other commercial	27.3	3.0	54.5	15.2

These may be the most hopeful numbers in this year's survey because the figures represent a dramatic turnaround from the year before. Over 60 percent of news directors say they expect staff size to remain the same this year, but that's up nearly 20 points from last year. A year ago, almost a third of all news directors were expecting staff cuts; this year, the number is less than a quarter as large. Two and half times as many news directors expect to increase staff this year as compared to the year earlier.

That hiring is expected almost all across the board -- except for the very smallest stations (1 - 10 staffers) and PBS affiliates.

TV News Budget ... the past year

	Increase	Decrease	Same	Don't know
All TV news	9.6%	65.1%	21.8%	3.4%
Big four affiliates	8.6	67.7	21.1	2.6
Other commercial	23.3	42.9	28.6	4.8

Market size:				
1-25	10.6	61.7	19.1	8.5
26-50	10.3	65.5	24.1	0
51-100	8.0	74.7	16.0	1.3
101-150	13.1	60.7	23.0	3.3
151+	6.3	58.3	31.3	4.2

Last year, I noted that the budget numbers were the worse I had seen in 15 years of doing this survey. But these numbers make last year look like the good old days. A year ago, a quarter of the news directors said their budgets had increased. This year, it's under 10 percent. Last year, just over 40 percent said their budgets had decreased; this year, it's almost two-thirds.

There were no meaningful differences no matter how I broke down the numbers.

TV News Profitability ... 2000 - 2010

	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Showing profit	47.8%	52.7%	55.4%	56.2%	57.4%	44.5%	58.4%	55.3%	54.9%	56%	58%
Breaking even	14.6	11.6	11.5	11.5	8.1	24.2	10.4	13.6	11.6	13	11
Showing loss	8.3	14.5	10.5	6.4	10.0	12.1	9.2	9.2	11.2	10	11
Don't know	29.2	21.3	22.6	26.0	24.4	19.2	22.0	21.9	22.3	21	20

Outside of the anomaly of 2005, this is the lowest profit percentage that I've seen in my 16 years on the survey. At nearly 5 percent, it's also the biggest one-year drop in profits (outside of 2005). Break even rose to its highest level, but loss dropped to one of its lowest levels ever. Note also that "don't know" rose to the highest level ever, too.

TV News Profitability ... by Size and Affiliation – 2010

	Showing profit	Breaking even	Showing loss	Don't know
Market size:				
1-25	42.9%	14.3%	11.9%	31.0%
26-50	51.7	24.1	0	24.1
51-100	48.6	9.5	13.5	28.4
101-150	50.8	16.9	3.4	28.8
151+	45.8 -	12.5	8.3	33.3
Staff size:				
51+	48.5	14.7	5.9	30.9
31-50	55.7	11.5	4.9	27.9

21-30	42.6	21.3	4.3	31.9
11-20	46.2	15.4	12.8	25.6
1-10	15.4	23.1	23.1	38.5
Affiliation:				
ABC	47.1	8.6	10.0	34.3
CBS	54.5	15.6	6.5	23.4
Fox	52.9	8.8	8.8	29.4
NBC	46.5	18.3	4.2	31.0
Big four affiliates	51.1	12.1	6.7	30.0
Other commercial	31.8	31.8	18.2	18.2

Geographically, stations in the Northeast were less likely than others to make a profit on news and more likely to lose money. Interestingly, it used to be that the smaller the market and the smaller the station, the less likely that the news director knew whether the station made a profit on news. This past year, an increasing number of news directors -- across the board -- don't know the answer.

Percentage of TV Station Revenue Produced by News – 2010

	Average	Median	Minimum	Maximum	Not sure
All TV news	44.7%	45.0%	5.0%	80.0%	71.4%
Market size:					
1-25	46.9	42.2	20.0	80.0	67.3
26-50	39.7	40.0	30.0 -	50.0	64.5
51-100	45.3	50.0	7.0	73.0	73.7
101-150	43.1	46.0	6.0	55.0	75.4
151+	42.6	40.0	5.0	65.0	70.8
Staff size:					
51+	44.5	43.0	20.0	73.0	70.4
31-50	42.3	50.0	6.0	60.0	72.6
21-30	47.8	50.0	7.0	80.0	76.6
11-20	42.8	42.5	30.0	55.0	75.6
1-10	22.5	22.5	5.0	40.0	76.9
Affiliation:					
ABC	42.1	45.0	22.0	67.0	75.0
CBS	43.0	42.6	6.0	73.0	69.6
Fox	37.9	35.0	7.0	66.0	70.3
NBC	49.5	50.0	6.0	80.0	71.1
Big four affiliates	45.4	45.0	6.0	80.0	70.2
Other commercial	38.4	40.0	5.0	60.0	73.9

The average revenue actually rose slightly from last year's 43.5 percent, and the median rose to

45 percent from 40 percent last year. A note of caution, though. The percentage of TV news directors who said that they didn't know how much revenue came from news soared from a year ago. In fact, it's the first time more than half the news directors reported that they didn't know how much station revenue news brought in. The overall numbers should still be good, but I'd urge caution in judging the various subsets which necessarily involve fewer respondents.

Radio

Radio news changed little in 2009. The amount of news on the air is just about the same as a year ago, and the typical radio news staff remained at one. If anything, radio news is even more centralized now than it has been, with the typical news director overseeing the news on three stations, and more than 80 percent of radio news directors saying they have additional station responsibilities beyond news.

Average Minutes of Locally-Produced Radio News – 2010

	All radio	Major market	Large market	Medium market	Small market
Weekdays:					
AM drive	27.9	41.6	21.6	27.9	27.2
Midday	12.1	10.6	8.0	13.3	12.4
PM drive	14.3	13.3	9.1	16.8	13.7
Night	3.0	2.3	0.8	5.3	1.9
Total weekday	57.3	67.8	39.5	63.3	55.2
Saturday:					
AM drive	15.4	21.4	9.8	18.4	12.8
Midday	6.9	10.0	3.5	6.0	7.4
PM drive	4.1	0	1.0	5.9	4.4
Night	2.6	0	0	6.0	1.5
Total Saturday	29.0	31.4	14.3	36.3	26.1
Sunday:					
AM drive	7.2	4.2	3.5	8.1	8.2
Midday	5.7	9.2	1.0	5.2	5.8
PM drive	4.0	4.5	1.0	5.9	3.0
Night	2.5	0	0	6.0	1.5
Total Sunday	19.4	17.9	5.5	25.2	18.5

Overall, the numbers are little changed from a year ago. Total weekday news rose by less than 5 minutes per day. Weekend went up slightly more. Major market stations dropped in news; large markets stayed about the same; medium and small markets rose modestly.

The larger the staff, the more news the station produced. Number of stations in a market

made no difference. Commercial stations ran more local news than non-commercial ones; group-owned stations ran a little more news than independents; and stations in the Northeast tended to run more news than stations elsewhere.

Radio Staff Size – 2010

	Avg. full-time	Median full-time	Max full-time	Avg part-time	Med part-time	Max part-time	Avg total staff	Med total staff	Max total staff
All radio news	2.1	1.0	16	1.9	1.0	16	3.3	2.0	22
Market size:									
Major	3.7	1.5	16	1.5	1.0	7	4.9	2.5	22
Large	2.7	1.0	9	1.5	1.0	4	3.4	2.5	13
Medium	2.0	2.0	9	2.3	2.0	10	3.4	3.0	15
Small	1.2	1.0	3	1.9	1.0	16	2.6	2.0	17

Without a few extraordinary radio news operations that we had last year, the average radio news staff fell back down to 2.1. The median, or typical, radio news operation remained at one. With part time holding at one, the total median staff size -- full plus part time -- fell to just two. Interestingly, the number of stations in the group did not change the number of newspeople -- which almost always remained at one. No difference between group or independent, but stations in the Northeast were more likely to be a little larger.

Changes in Radio News, Staff and Budget in the last 12 months and planned for the future – 2010

	Increase	Decrease	Same	Not sure
Amount of news the past year	27.6%	12.2%	60.2%	0
Plan to change amount of news next year	17.6	0.8	73.6	8.0
Total news staff the past year	12.8	20.0	67.2	0
Plan to change amount of staff next year	5.6	3.2	75.0	16.1
Change in news budget from the year before	9.1	18.2	45.5	27.3

Major market, group-owned and non-commercial stations were most likely to have

increased the amount of news in the last year. Non-commercial and independent stations are a little more likely to expect to increase the amount of news this year. Non-commercial, group-owned and the larger local groups were the most likely to have increased staff in the last year -- although all those numbers were small. Very few stations plan to either increase or decrease staff this year, although stations in major markets are a little more likely to plan to increase. A little over twice as many stations said the budget went up as compared to a year earlier. But two and a half times as many said the budget went down compared to a year earlier. Non-commercial and major market stations were more likely to say the budget went up. Group-owned stations were more likely to say the budget fell.

Radio News Profitability ... 2000 to 2010

	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Showing profit	13.9%	11.8%	21.0%	29.1%	18.1%	19.6%	22.5%	25.2%	15.2%	17%	25%
Breaking even	13.9	16.7	13.7	13.1	17.6	14.4	17.1	13.8	13.9	17	15
Showing loss	9.8	9.8	10.5	8.6	6.4	3.1	7.2	2.4	7.3	0	7
Don't know	62.3	61.8	54.8	49.1	58.0	62.9	53.2	58.6	63.6	66	53

This year's numbers look a lot like last year's. Group-owned stations were more likely to report a profit on news.

Radio News Profitability by Market Size – 2010

	Showing profit	Breaking even	Showing loss	Don't know
Major market	0%	7.1%	7.1%	85.7%
Large market	17.6	29.4	11.8	41.2
Medium market	13.3	13.3	8.9	64.4
Small market	15.6	11.1	11.1	62.2

Major markets are those with 1 million or more potential listeners. Large markets are from 250,000 to 1 million. Medium markets are 50,000 to 250,000. Small markets are fewer

than 50,000.

Number of Stations Where the Radio News Director Oversees the News – 2010

No. of Stations	Percentage
One	19.5%
Two	26.8
Three	8.7
Four	8.1
Five	14.8
Six	12.1
Seven	2.7
Eight	2.7
Nine+	4.7
Overall	Number
Average	3.3 locally + 1.1 elsewhere
Median	3.0
Maximum	22 locally + 50 elsewhere

Although the change hasn't been steady, radio news directors, over the years, have been overseeing more and more stations. Last year, 30.7 percent of news directors oversaw the news on more than three stations. This year, nearly half, 48.5 percent, do that. The average number is up from 3.0 to 3.3 locally and from 0.7 to 1.1 somewhere else.

Where more than one related station ran news in a market, almost two-thirds of them (66.2 percent) had a centralized newsroom.

What Else Radio News Directors Do – 2010

This year, 81.4 percent of radio news directors said they had other responsibilities at the station beyond news. That's up from last year's 77.9 percent and just behind the all time record of 83.1 percent two years ago. It's highest for news directors who are a staff of one, with a single station in one market and in major markets.

What else radio news directors do

Other job	Percentage
Talk show host	18.0 %
Program Director	15.7
Announcing (including sports and weather)	11.2

Production	11.2
Operations	11.2
General Manager	10.1
Public Affairs	7.9
Sales	4.5
Other	10.1

Most of these numbers are up just slightly from the last few years, although sales and other are both down from last year.

Bob Papper is the Lawrence Stessin Distinguished Professor of Journalism and chair of the Department of Journalism, Media Studies, and Public Relations at Hofstra University and has worked extensively in radio and TV news. This research was supported by the School of Communication at Hofstra University and the Radio Television Digital News Association.

About the Survey

The RTDNA/Hofstra University Survey was conducted in the fourth quarter of 2009 among all 1,770 operating, non-satellite television stations and a random sample of 4,000 radio stations. Valid responses came from 1,355 television stations (76.6 percent) and 203 radio news directors and general managers representing 301 radio stations.

Some data sets (e.g. the number of TV stations originating local news, getting it from others and women TV news directors) is based on a complete census and is not projected from a smaller sample.

Broadcast Interactive Media Madison WI

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Belo Corp Launches YouNews™ Social Media Platform on 16 Websites

Originally printed at <http://www.broadcast-interactive.com/news/82170542.html>

By (BI) Angela Wheaten
January 20, 2010

Product Distribution Growth at 23% for 4th Quarter, 2009

MADISON, WI – January 20, 2010 - Broadcast Interactive Media (BIM) today announced significant growth (23%) during 4QTR 2009 in the total number of [YouNews™](#) Social Media platform affiliates, which currently stands at 89 websites in 73 markets.

The increase came from new local media partner, Belo Corp, which recently launched 16 websites with BIM. 11 of the sites feature the YouNews label, with 5 markets electing to retain previously established branding such as "Your Pics" ([KGW/Portland](#)), "First Person" ([KTVB/Boise](#)) or "Your News" ([KING-NWCN/Seattle](#), [KREM/Spokane](#)).

Unveiled by BIM in April 2007, YouNews allows community members to upload videos, photos and stories to local media websites for use on-air or for cross-targeting elsewhere online. The platform includes revenue opportunities, local and national contesting, national content exchange, plus content moderation. In addition, YouNews is built into the BIM CMS, allowing partners on the BIM platform to quickly integrate user-generated content throughout their websites.

Joe Weir, Belo GM/Interactive reports, "Staff in all markets is poised to maximize the new content, traffic and revenue that come with our re-launched websites and the addition of the YouNews platform. News Directors and staff report an influx of submissions, and our sales teams are already lining up revenue from local sponsors."

BIM VP, Publisher Development Richard Sullivan noted, "The YouNews social media toolset delivers a well-packaged revenue, traffic and contesting opportunity, combined with the ability to harvest hyper-local, exclusive videos and photos for use on-air. BIM is pleased to be partnering with Belo to expand their news product to include content from citizen journalists."

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About Broadcast Interactive Media

Based in Madison, WI, Broadcast Interactive Media (www.broadcast-interactive.com) is the leading provider of locally-focused advertising and content solutions for more than 180 television, radio, and newspaper websites. BIM provides a comprehensive suite of revenue-generating programs and national sales support, advertising and content network operations, video streaming, and technology development. Exclusive products include the YouNews™ Social Media platform, a rapidly expanding catalog of local sales verticals such as Healthy Living and Green, as well as a proprietary video services product, BIMVid™. Customers include Belo Television Group, NBC LIM, McGraw-Hill Broadcasting, Fisher Communications, American Cancer Society, West Virginia Media and Granite Broadcasting. Connect with BIM at <http://twitter.com/bimlocal> or <http://twitter.com/younews>.

About Belo Corp.

Belo Corp. (BLC) is one of the nation's largest pure-play, publicly-traded television companies, with 2008 annual revenue of \$733 million. The Company owns and operates 20 television stations (nine in the top 25 markets) and their associated Web sites. Belo stations, which include affiliations with ABC, CBS, NBC, FOX, CW and MyNetwork TV, reach more than 14 percent of U.S. television households in 15 highly-attractive markets. A Belo station ranks first or second in nearly all of their local markets. Additional information is available at www.belo.com

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Apple to offer 99-cent TV show rentals on revamped box

The new service will initially offer only shows produced by ABC Television Group and Fox Filmed Entertainment, but some providers are reluctant to join in.

September 02, 2010 | By David Sarno and Dawn Chmielewski, Los Angeles Times

Reporting from San Francisco and Los Angeles — Apple is taking a bite out of online TV rental prices, in part to try to revitalize the service caught on with consumers.

The computer maker, which revolutionized the music industry nine years ago with its iPod and online iTunes store, said it will offer TV show rentals for 99 cents online, down from as much as \$2.99.

Initially, only shows produced by Walt Disney Co.'s ABC Television Group, such as "Desperate Housewives," and News Channel 4, such as "Glee," will be available at the bargain price. Also, BBC America will have its shows on the plan.

The majority of Hollywood studios and two broadcast networks — CBS and NBC — declined to allow their shows to be included in the new service.

Apple Chief Executive Steve Jobs, who announced the new service and upgrades of several company products at an event in San Francisco, acknowledged that many providers were not aboard.

"Not all of them wanted to take this step with us," Jobs said. "We think the other studios will see the light."

That light could be at the end of a very long tunnel, some analysts said.

"We believe it would be shortsighted for the studios to devalue their product and enhance Apple's power over the electronics industry," said John D. Gould, an analyst with Evercore Partners, wrote in a note to investors.

Television producers, who spoke on condition of anonymity for fear of antagonizing a powerful distributor like Apple, say the economics that underwrite the cost of creating expensive television shows. Some are concerned that giving consumers access to individual episodes of a show such as CBS' "CSI: Miami" would undermine DVD sales, because it would cost less than \$24 to watch a single episode, contrast, sells for more than \$50.

Other producers worry that 99-cent TV show rentals would split up lucrative season-long bundles of TV show. It's far more common to rent 100 episodes of a show into syndication, as Warner Bros. did in a \$25-million deal that gave streaming rights for all 100 episodes for \$25 million.

The 99-cent a la carte offerings might have trouble catching on with consumers. Most TV shows available online now are part of all-you-can-eat subscription plans from Netflix.

Media analyst Paul Verna of researcher EMarketer said Apple is missing the mark when it comes to TV shows. Unlike movie rentals, renting TV shows.

"I think a lot of people would rather watch for free on Hulu, or even pay the subscription on Hulu, but have this illusion of a la carte," Verna said.

It might be even tougher to get the public behind the Apple TV device, introduced four years ago to deliver online programs.

"It's never been a huge hit," Jobs said. The new version of the device shows programs in high-definition and has built-in 1080p HD. The new Apple TV will be available in about a month, Jobs said. The original cost \$229.

The device has an HDMI connector to hook it into a high-definition television. It has no storage; all offerings coming from the Internet.

But Apple's move comes as more consumers are watching movies and television over broadband Internet lines rather than through satellite. This has pitted Silicon Valley companies such as Apple, Amazon.com and Netflix against cable providers in a struggle to control the market for content delivered.

"People are just becoming more attuned to broadband media as opposed to broadcast," said Jordan Selburn, an analyst at Strategy Analytics Corp. in El Segundo.

But Apple TV has ample competition. IDC said the market for Internet-connected living room devices — a category that includes the Apple TV but also video game consoles and Web-ready TVs that can handle online video content — is growing faster than the overall Internet device market, including computers.

By 2014, the company said, manufacturers will ship 450 million connected living room devices, more than four times the number of traditional TV sets.

But getting online-connected devices doesn't mean consumers will cancel their usual TV sources, at least right away.

"The bigger issue is whether people are willing to fundamentally cut the cord with their video content provider," Selburn said. "The boxes like this being able to completely supplant DirecTV, Comcast, etc."

On the music side, Jobs introduced a social network feature, Ping, that will be added to iTunes to allow users to establish connections with friends to see what music they're listening to. "It's a social network all about music," Jobs said.

And he announced upgrades to several of the company's iPod music players. Some have added features but nothing much new. The added features are already available on other Apple products. The upgraded models, which will be available next week:

- **iPod Touch:** This touch-screen music player — which also has Internet access to browse the Web and get apps for gaming — has a front-facing video camera to allow for live video chats. This service, which Apple calls Facetime, was introduced in June. Video chats on the iPod Touch will be enabled only in Wi-Fi areas.

Also new on the Touch: a higher-resolution screen (the same one that's on the latest iPhone) plus a rear-facing camera for photos.

Prices will start at \$229 for the 8GB storage model, topping out at \$399 for the 64GB model.

- **iPod Nano:** This unit got the most radical makeover. Apple has done away with the traditional click wheel in favor of a touch-sensitive interface. It's nearly all-screen in appearance and square in shape. It will include a radio, but unlike the current Nano, it will not have a screen.

Prices start at \$148 for the 8GB storage version.

- **iPod Shuffle:** The smallest iPod, with no screen, will again get buttons (the current model is buttonless) to make it easier to use.

Price: \$49.

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Updated: Thu., Dec. 2, 2010, 4:12 AM

Primetime Netflix

By CLAIRE ATKINSON

Last Updated: 4:12 AM, December 2, 2010

Posted: 12:11 AM, December 2, 2010

Netflix is making an aggressive play for in-season episodes of hit TV shows to expand its Web streaming service.

The company is in talks with studios about gaining access to current episodes of primetime shows and is willing to pay between \$70,000 and \$100,000 per episode, according to a person familiar with the matter. Netflix had no comment.

Netflix CEO Reed Hastings has made no secret of his desire to move beyond movie rentals and beef up TV offerings. While the company has added a number of shows, such as "Nip/Tuck," "Veronica Mars" and "The Family Guy, they are mostly episodes from previous seasons.

Just last month, Netflix won a groundbreaking deal with NBC Universal to stream comedy show "Saturday Night Live" the day after it airs on the broadcast network.

With Netflix ready to put its money where its mouth is -- and a host of rivals such as Apple and Google's YouTube also in the hunt -- a war is breaking out over who controls streaming rights to current episodes.

The studios that supply the networks with shows argue they own the streaming rights to in-season shows. But the broadcast networks that make a profit from repeats -- and stand to lose audiences, ad dollars and syndication revenue if viewers can see those same episodes on Netflix -- argue they control the rights.

"It's a big source of friction," said one TV executive familiar with discussions. "There are no agreements [on control of rights], but I think it will trend toward the networks being in charge of selling in-season in first run, and beyond that, the studio."

Netflix recently changed its pricing to offer a streaming-only service for \$7.99. But to make it attractive the company needs more up-to-date content -- the kind currently available on Hulu and on broadcast networks' own Web sites.

Meanwhile, the more deals Netflix seals, the more uneasy Hollywood gets about the creation of a streaming giant.

"People are wondering if they did the right thing by selling to them," said one Hollywood source. "Are we mortgaging our future?"

Yesterday, Netflix signed up another content partner, indie firm FilmDistrict, for first-run movies in the traditional pay-TV window, jumping ahead of premium pay-TV services like HBO that would normally get first crack.

Netflix is on track to deliver some 300 million streams, double the number last year, according to research firm Screen Digest, but has spent just \$350 million on digital rights to date.

If Netflix gains access to current TV shows, it would be in direct competition with Hulu, the Web TV hub backed by News Corp., NBC Universal, Disney and Providence Equity Partners. News Corp. also owns The Post. Hulu offers a Hulu Plus subscription service with access to current seasons of shows as well as older episodes for \$7.99. *catkinson@nypost.com*

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Press Release

comScore Releases October 2010 U.S. Online Video Rankings

Hulu Delivers 1 Billion Video Ads as Fall TV Season Increases Viewership

RESTON, VA, November 15, 2010 – comScore, Inc. (NASDAQ: SCOR), a leader in measuring the digital world, today released data from the [comScore Video Metrix](#) service showing that 175 million U.S. Internet users watched online video content in October for an average of 15.1 hours per viewer. The total U.S. Internet audience engaged in more than 5.4 billion viewing sessions during the course of the month.

Top 10 Video Content Properties by Unique Viewers

Google Sites, driven primarily by video viewing at YouTube.com, ranked as the top online video content property with 146.3 million unique viewers. Yahoo! Sites captured the #2 spot with 53.8 million viewers, followed by Viacom Digital, jumping 4 positions in October with 52.9 million viewers. VEVO secured fourth place with 47.6 million viewers, closely followed by Facebook.com with 47.4 million. Google Sites had the highest number of viewing sessions, crossing the 2.0 billion mark in October, and average time spent per viewer at 272 minutes, or 4.5 hours.

Top U.S. Online Video Properties by Video Content Views Ranked by Unique Video Viewers October 2010 Total U.S. – Home/Work/University Locations Source: comScore Video Metrix			
Property	Total Unique Viewers (000)	Viewing Sessions (000)	Minutes per Viewer
<i>Total Internet : Total Audience</i>	175,186	5,473,282	908.0
Google Sites	146,346	2,019,298	271.6
Yahoo! Sites	53,839	233,098	30.3
Viacom Digital	52,885	176,457	53.7
VEVO	47,569	236,461	77.9

Facebook.com	47,423	162,402	17.1
Microsoft Sites	47,095	265,506	38.9
AOL, Inc.	43,381	195,946	22.9
Fox Interactive Media	38,478	187,204	16.5
Break Media Network	31,115	122,070	41.2
Hulu	29,650	182,404	207.8

Top 10 Video Ad Properties by Video Ads Viewed

Americans viewed more than 4.6 billion video ads in October, with Hulu generating the highest number of video ad impressions at a record 1.1 billion. Tremor Media Video Network ranked second overall (and highest among video ad networks) with 533 million ad views, followed by ADAP.TV (435 million) and BrightRoll Video Network (374 million). Video ads reached 45 percent of the total U.S. population an average of 34 times during the month. CWTV.com delivered the highest frequency of video ads to its viewers with an average of 50.8 over the course of the month.

Top U.S. Online Video Properties by Video Ads* Viewed Ranked by Video Ads Viewed October 2010 Total U.S. – Home/Work/University Locations Source: comScore Video Metrix			
Property	Video Ads (000)	Frequency (Ads per Viewer)	% Reach Total U.S. Population
<i>Total Internet : Total Audience</i>	4,678,336	34.1	45.5%
Hulu	1,109,899	38.1	9.7%
Tremor Media Video Network**	533,201	7.0	25.1%
ADAP.TV**	434,839	7.2	20.1%
BrightRoll Video Network**	374,394	5.9	21.1%
CBS Interactive	270,346	9.3	9.7%
Microsoft Sites	227,398	10.1	7.4%
CWTV.com	202,842	50.8	1.3%
SpotXchange Video Ad Network**	193,765	5.7	11.2%
AOL, Inc.	172,327	6.3	9.1%

Google Sites	170,509	4.1	13.9%
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**Video ads include streaming-video advertising only and do not include other types of video monetization, such as overlays, branded players, matching banner ads, homepage ads, etc.*

***Indicates video ad network/server*

Other notable findings from October 2010 include:

- The top video ad networks in terms of their potential reach of the total U.S. population were: ScanScout at 44.3 percent, Break Media at 42.0 percent and BrightRoll Video Network at 41.9 percent.
- 84.1 percent of the U.S. Internet audience viewed online video.
- The duration of the average online content video was 5.0 minutes, while the average online video ad was 0.4 minutes.
- Video ads accounted for 12.8 percent of all videos viewed and 1.2 percent of all minutes spent viewing video online.

About comScore

comScore, Inc. (NASDAQ: SCOR) is a global leader in measuring the digital world and preferred source of digital marketing intelligence. For more information, please visit www.comscore.com/companyinfo.

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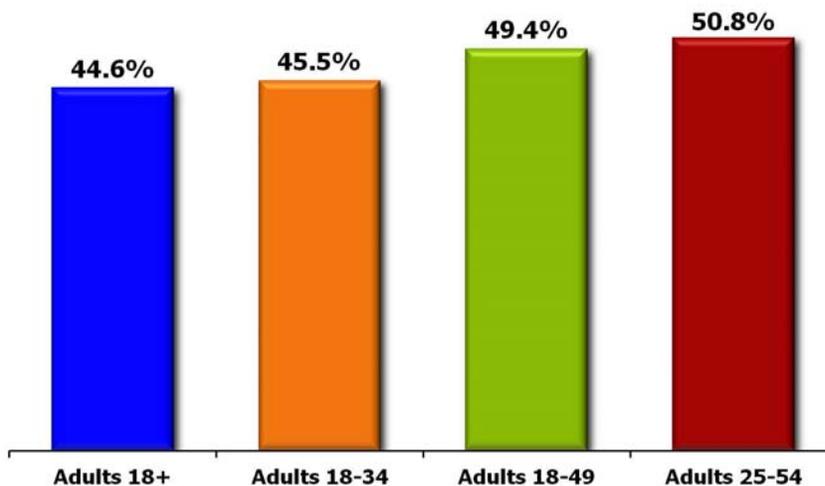


Buying Station Websites

Why Buy Local Television Station Websites?

Local broadcast TV station websites reach local consumers, where they live and make purchases. And more adults turn to local TV station websites for local news and event information than any other local sites.

Adults Who Have Visited Websites Affiliated with Local Broadcast Television Stations



More Adults Visit Local Television Station Websites for Local News and Event Information

	18+	18-34	18-49	25-54
Local television station website(s)	52.3	52.4	54.7	53.2
Local newspaper website(s)	43.2	41.5	39.8	42.0
Local radio station website(s)	9.3	14.4	11.6	10.9
Other Local Site(s)	6.6	5.0	7.2	8.2
None/Don't know	2.5	2.1	2.3	2.0

TVB Media Comparisons Study 2010. Knowledge Networks, Inc. Custom Study

Hyper-Local Websites

Local TV station microsites offer highly-targeted neighborhood and lifestyle content to reach specific consumer groups and advertiser retail zones. They feature community news and user-generated content about area happenings and events. Local businesses benefit from the opportunity to connect with potential customers and drive traffic and to their door. And integrating an on-air campaign with an online component, maximizes effectiveness across platforms.

Hyper-local website opportunities include:

- Search
- Coupons

- [Business Directories](#)
- [Ad Targeting](#)

Local broadcasters offering hyper-local website opportunities include:

[Fisher Communications](#)

[Gannett Broadcasting](#)

[NBC Local Media](#)

[Raycom](#)

Additional Resources:

[Why Local TV Station Websites PPT](#)

[IAB Online Ad Standards and Guidelines](#)

[Borrell 2010 TV Web Site Revenues PDF](#)

[IAB Long Form Video Overview PDF](#)

[Internet Measurement Methodologies PDF](#)

For links to local broadcast station and hyper-local websites by market, visit the [Market Profiles](#) section.

RELATED ITEMS

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APRIL 2010

Benchmarking: TV Web Sales Defy Gravity, Gain 10%

***TV Web Revenues & Online Ad
Spending Projections for 211 Markets***

Special Report for TVB Members

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We would like to thank the Television Bureau of Advertising for its eagerness to help the broadcast industry, The Media Audit for providing detailed audience data for 95 markets, and the hundreds of broadcast executives who participate in our ongoing surveys. Their willingness to share information and their insights have helped us – and the industry – better understand a rapidly changing media environment.

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Introduction

This is our eighth year conducting surveys on local Web revenues and our fifth year producing a customized report for the Television Bureau of Advertising. This report analyzes Web revenues for 573 TV stations¹ from our database of 4,438 local Web properties in the U.S. and Canada.

This year's survey requested information from 2009 regarding:

- Online revenue
- Online expenses
- Revenue from employment, auto and real estate advertising
- Ad revenue from:
 - National sales
 - Streaming audio
 - Streaming video
 - E-mail
 - Paid search
 - Mobile applications
- Percentage of revenue derived from banners and pop-ups
- Percentage of revenue driven by "up-sold" broadcast advertising²
- Number of online-only salespeople
- 2010 budget projections for all of the above

We solicit participation in our surveys by telephone and e-mail directly to companies. Participation is voluntary and without incentives. It is also confidential. We therefore do not furnish the names of participating companies, nor do we reveal property-specific data. Survey information is supplemented by online surveys and telephone interviews.

By combining this information with our Local Ad Spending Report (LA\$R™) estimates for each market, we are able to get a market-by-market glimpse at how well these local sites are competing with the pure-play Internet companies and other competitors for local ad dollars. A full list of local online ad spending by DMA™³ is in Appendix A, and a list of total mobile ad spending by DMA™ can be found in Appendix B.

A description of our methodology for compiling ad-spending estimates can be found in Appendix C.

¹ Not all points of analysis cover 573 stations. Chart and tables display the "n = .xx" designation, whereby ".xx" refers to the number of stations included in that particular analysis.

² All references to "online advertising" in this report do not include broadcast advertising sold as a part of convergence packages or online/on-air combos, nor does it include retrans fees often reported as "digital" revenues by broadcasters.

³ Designated Market Area, or DMA, is a trademarked term of Nielsen Media Research.

Executive Summary

TV Web sales defied gravity in 2009 as online revenues grew 10 percent for stations. Total online ad revenues for stations hit \$1.1 billion last year, for an 8.7 percent share of all local online advertising, as broadcasters gained ground against their principal in-market competitors, newspapers. A TV station's Web site beat out the major daily newspaper site in nearly one-fourth of the top 95 markets.

Many stations continued to branch out beyond the usual TV-online format and launched separately branded URLs and hyperlocal news and sports sites and even stand-alone local shopping sites.

It may be more difficult to squeeze such positive numbers from TV Web efforts in the future, however. Local online advertising expenditures, which saw a 45 percent Compound Annual Growth Rate (CAGR) in the past five years, are likely to see less than 4 percent growth over the next five as local online media buys peak at 17 percent of all local ad spending.

Still, the amount broadcasters derive from Web sales is relatively small – typically less than 5 percent of a stations' total gross revenues. About 84 percent of the 573 stations in our survey made less than \$1 million in Web sales last year. We are forecasting 21 percent growth this year, though broadcasters' 2010 budgets are calling for more.

Now that the local online advertising landscape is maturing (it is, after all, 15 years old), a new disruptor has emerged: Mobile. Local mobile advertising surpassed \$200 million last year – TV broadcasters captured about 12 percent of that – and is expected to skyrocket into the billions within two years as the transition from desktops and laptops to hand-held devices takes off.

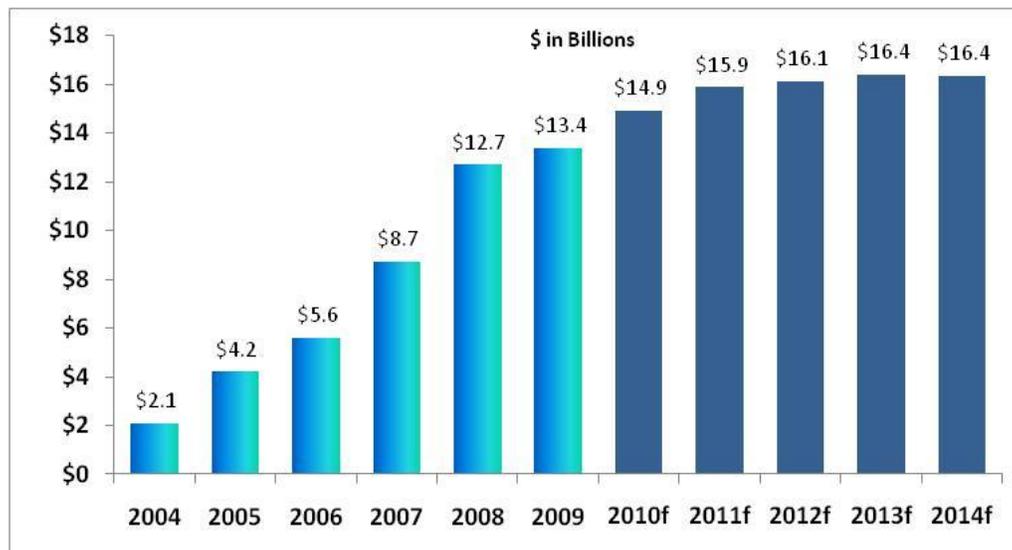
CHAPTER 1

The Local Online Advertising Landscape

Nothing grows forever, and at a current share of 14.2 percent of the \$93.5 billion spent on local advertising in 2009, online ad media buys are exhibiting signs of maturity. The growth rate for local online advertising last year slowed to single digits for the first time since it became trackable a decade ago, hitting \$13.3 billion, or 5 percent above a year earlier.⁴

That was a virtual crawl compared with the previous five-year jag in which local online ad sales achieved a 44.9 percent Compound Annual Growth Rate (CAGR) since 2004. Over the next five years, we expect the CAGR to be 4.1 percent as local online advertising peaks at a 17 percent share of all locally spent advertising – second-highest only to newspapers’ estimated 24 percent share. Online media could conceivably achieve more – a subject worthy of debate – but historically no other local medium (except newspapers) has captured more than 18 percent of all locally spent ad dollars.

Figure 1.1 Local Online Advertising Plateaus by 2011



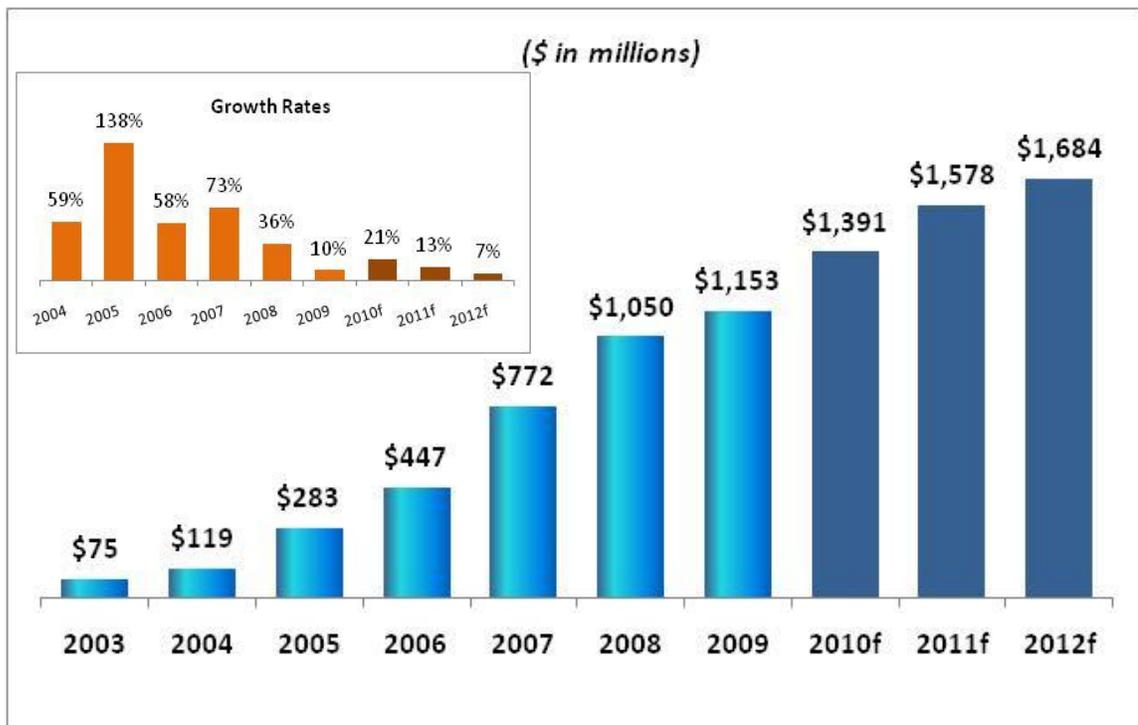
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⁴ Part of the reason for this slowdown in local online ad growth is the shift toward online promotions and public relations – marketing channels that allow companies to develop direct, one-on-one relationships with individual consumers without having to go through an ad medium to reach them. Better database marketing tools that enable highly targeted re-marketing and the desire for measurable ROI on marketing expenditures are driving this trend. National advertisers are a few years ahead of local advertisers in this migration.

Even as the growth rate slowed, competition grew among legacy media companies and the “pure-play” Internet companies trying to interest local businesses in online ad products. Newspapers, TV stations, radio stations and yellow pages companies all pushed digital products hard, and even local cable sales forces started peddling online products such as banners and video advertising.

TV Web sales brought in \$1.15 billion in 2009, 10 percent more than in the previous year. Individual results ranged broadly, with the median growth rate at 8.9 percent and about one in eight stations reporting growth of 40 percent or more. Growth rates for TV sites have been declining for the past three years; we expect that to reverse this year before trending down again in 2012.⁵

Figure 1.2 Local TV Web Revenues, 2003 through 2012



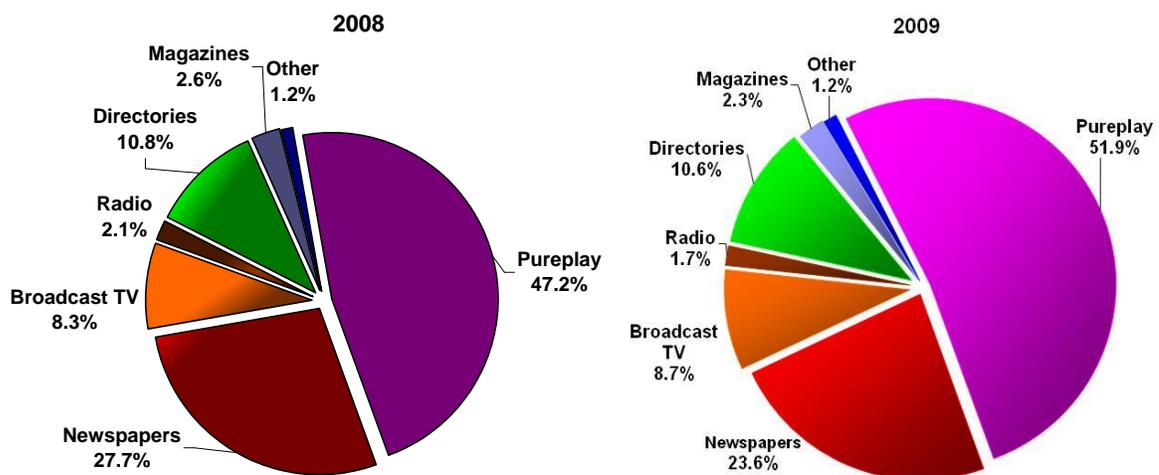
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⁵ Starting in 2010, Borrell Associates is counting mobile advertising separate from “online advertising.” Thus, our growth forecasts for “TV Web revenues” do not include revenues that stations may get from local mobile ad sales.

We are forecasting a 21 percent uptick in TV Web revenues this year. Stations' budgets are calling for an average increase of 32 percent, but in the eight years we have been tracking online budgets, we have found that stations collectively miss them by 25 to 33 percent. In 2011 we expect a 13 percent increase, and by 2012 a 7 percent increase – following the pattern we saw in newspaper online sales stalling out after saturating their current advertiser base. What would make this prediction wrong is if stations added significant sales resources to pursue non-traditional broadcast advertisers. To date, we have not seen that occur. In fact, we saw a number of stations eliminate online-only sales positions last year and push greater online responsibility onto existing broadcast reps. That has been a failed strategy for the newspaper industry, which has seen its share of local online advertising slip from a high of 44 percent in 2004 to an all-time low of 23.6 percent last year, due in part to having saturated its print advertising customer base with online sales and failing to devote resources to pursuing non-print advertisers, and in part to not being able to offer high-demand products such as search advertising. Companies such as Tribune, Belo, Cox and The New York Times either eliminated or severely gutted their digital divisions in that time frame, putting responsibility for online product development and sales under print managers.

TV stations, meanwhile, continue to see their share of local online dollars grow. They saw a 0.4-point increase in share in 2009, growing from 8.3 percent to 8.7 percent of all locally spent online advertising.

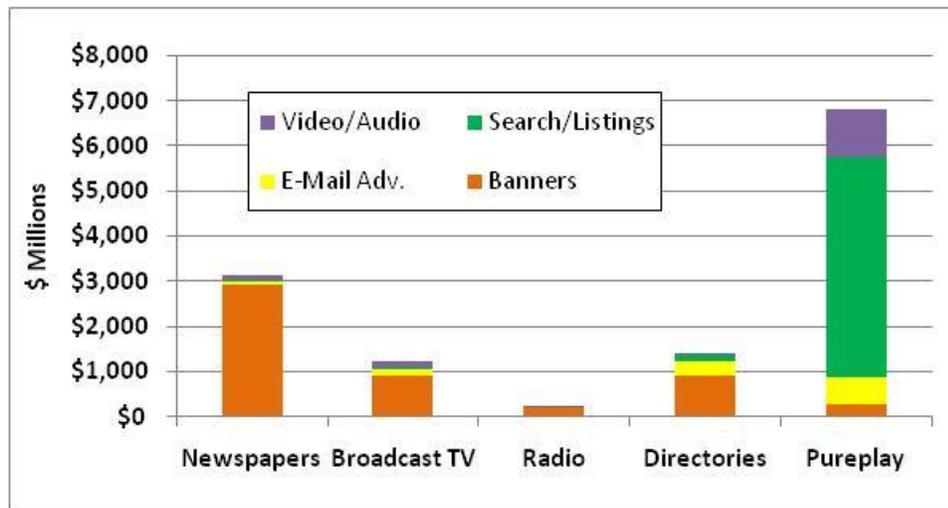
Figure 1.3 Local Online Advertising Shareholders, 2008 vs. 2009



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A persistent issue for legacy local media companies is their dependence on static display or banner-type advertising. As the chart below illustrates, pure-play Internet companies – which we define as companies such as Local.com, ReachLocal, Yahoo, Marchex, Yodle, Craigslist and others that sell online advertising but are not affiliated with traditional media – have driven far higher revenues without depending on banner sales. While pure-play companies can claim more than six times the local online revenue of TV stations, TV stations can claim more than three times the revenue in banner sales.

Figure 1.4 Legacy Media Depend Heavily on Banner Ads, While Pure-Play Internet Companies Do Not

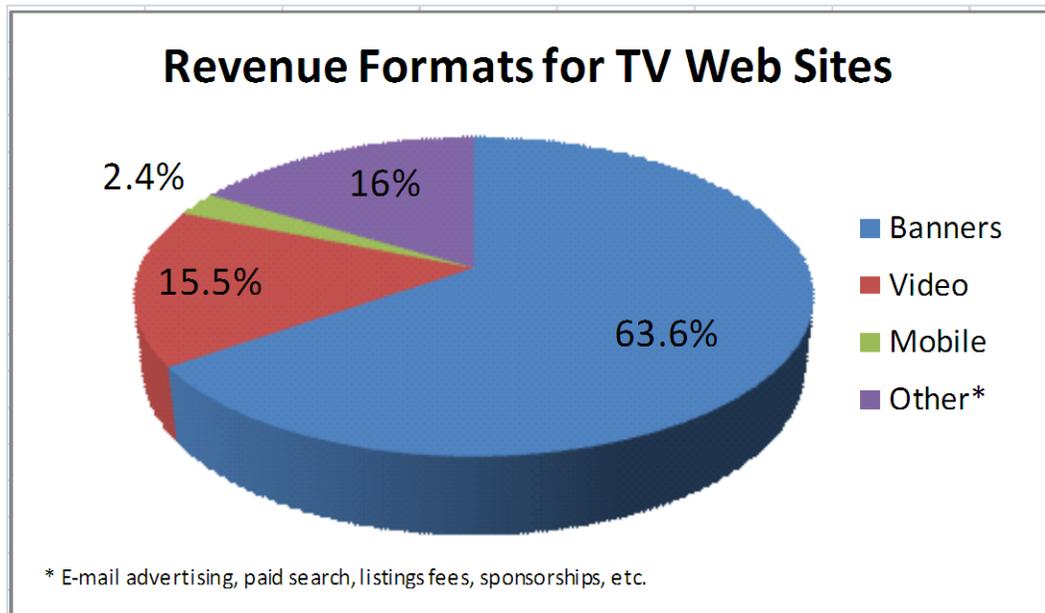


The troubling issue, of course, is that static-text banner sales are in decline while formats such as paid-search and directory listings, online video advertising and e-mail advertising all show greater promise. One glimmer of hope for banner sales may be highly targeted, rich-media banners rather than static display banners. Highly targeted ads and those that relate directly to the content that a Web user is reading tends to be “seen” more than run-of-site banners. Yahoo’s geo-targeted banner advertising program, launched in earnest last year via local newspaper partnerships, may drive as much as \$250 million this year in banner sales. Yahoo has begun offering the program to broadcasters, recently signing up Media General and Freedom Communications stations.

The good news is that TV Web sites reduced their dependence on display advertising last year as mobile and video advertising assumed a greater role. In 2008 TV stations

derived 77 percent of their revenues from banners and pop-ups. Last year it dropped to 64 percent

**Figure 1.5 Sources of Online Revenue
for Broadcast TV Stations, by Format**



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CHAPTER 2

Benchmarking TV Web Sites

On average, TV stations saw Web revenues increase 10 percent last year. But as we described in the first chapter, this growth rate wasn't enjoyed by all stations. In fact, growth was very erratic. As we set out to compile last year's report, many stations told us they were intent on doubling their Web revenues in the face of an "odd" broadcast year – no Olympics or major elections. They had intended to capitalize on the relative lull in broadcast sales by focusing more resources on Web operations.

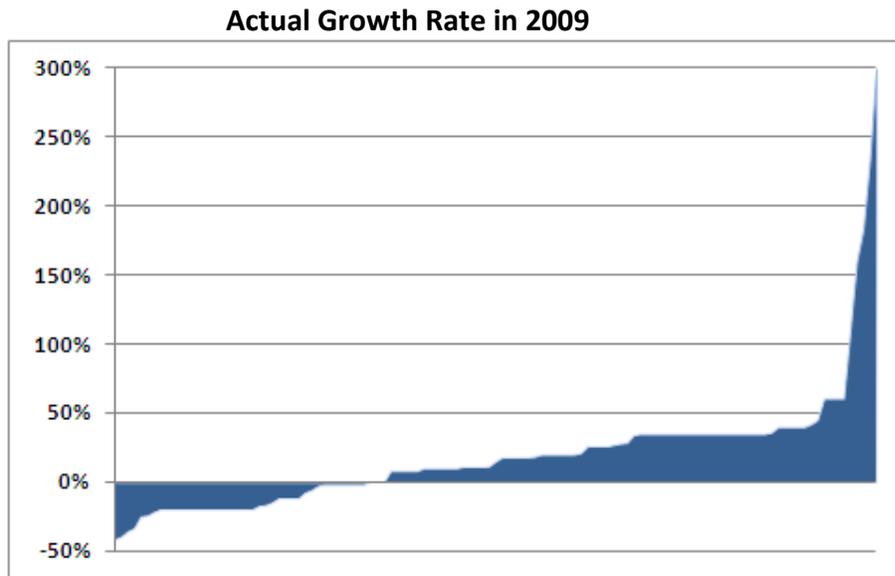
That was certainly the case for companies such as Fisher Communications, which redoubled its Web efforts by launching a series of hyperlocal sites in its home base of Seattle, then in its other TV markets. By year-end 2009, after only four months, Fisher had launched more than 40 hyperlocal sites and had nearly 1,000 local advertisers on board. The late-in-the-year launch wasn't enough to move the needle for Fisher in 2009: its total interactive revenues declined 12 percent for the year, to \$1.7 million, and were flat in the last quarter of 2009.

(To see a video interview with Troy McGuire, vice president and general manager of Fisher Interactive, discussing the company's hyperlocal initiative, go to www.borrellassociates.com/TVB.)

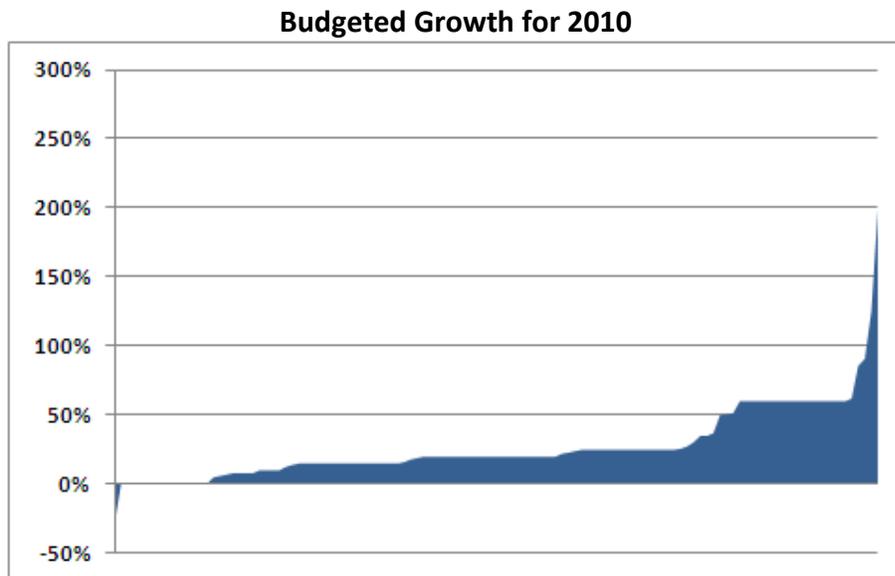
The initiative to reach out to non-broadcast advertisers with Web offerings seems to be intensifying. In the first quarter of 2010, Raycom, Hubbard and Morgan Murphy stations had followed Fisher's lead with their own hyperlocal sites using the same platform, DataSphere Technologies, a software and hyperlocal sales company. These companies, along with others such as Nexstar Broadcasting, have been building Web revenues through telemarketing sales, not exclusively through broadcast reps. Others, like LIN TV, are adding digital staffing, not consolidating. LIN had 20 staffers in its interactive unit in 2006; by the end of 2009, it had 123.

Not all TV stations were able to execute on their ambitious 2009 goals, however. Figure 2.1 illustrates growth rates for a sampling of 118 TV stations last year, and the budgets they told us they were pursuing this year.

Figure 2.1 TV Web Site Revenue Growth



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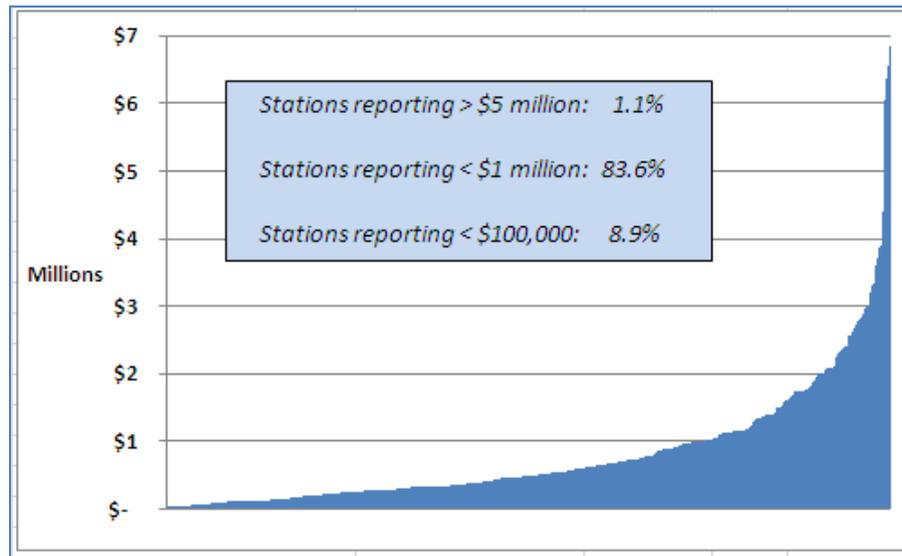


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The vast majority of TV sites still make less than \$1 million in online sales – about 84 percent according to our survey. For most of them, this represents less than 4 percent of total station revenues. About 9 percent of all stations still make less than \$100,000 in online sales. These are typically stations in very small markets, Hispanic stations that

haven't concentrated on online sales or found them difficult to execute, or stations with weak or no local news broadcasts. No station in our survey reported more than \$7 million in online sales, although a half-dozen sites came close.

Figure 2.2 Total Web Revenues for 571 TV Stations, 2009



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The average TV site had \$711,000 in online sales last year. Small-market stations generally made about \$400,000, while large-market stations averaged \$1.4 million. Growth was uneven across markets, as per-site revenues for stations in Top 20 markets were virtually flat, increasing an average of only 0.6 percent. Stations in smaller markets enjoyed better growth. Those in markets 50-100 averaged 15.4 percent growth, while those in markets 101-210 saw growth of 13.5 percent.

**Figure 2.2 Average Per-Station TV Web Revenues
By Market Size, 2007-2009**

Market Size	2007	2008	2009
1-20	\$825,279	\$1,365,505	\$1,374,629
21-50	\$726,507	\$702,655	\$794,309
51-100	\$317,175	\$425,360	\$491,074
101-210	\$203,162	\$266,663	\$302,664

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The next several pages offer other benchmarks to help TV site operators gauge their performance against the upper limits of success.

As stated in Chapter 1, TV sites in 2009 captured a 8.7 percent share of all local online advertising spent within their Designated Market Area (DMA™). But that is for *all* TV stations in *all* markets. An individual station, on average, captures a 0.5 percent to 1.5 percent share of all local online advertising. Large-market stations tend to capture smaller shares. (To calculate your share, divide your total site revenues for 2009 into the total local online ad spend for your market, found in Appendix A.)

**Figure 2.4 TV Sites' Share of
Local Online Advertising by Market Size, 2009**

Market Size	Avg. Share of Local Online Advertising	Top Share of Local Online Adv.
1-20	0.5%	3.1%
21-50	0.8%	4.9%
51-100	1.2%	12.5%
101-210	1.5%	18.0%

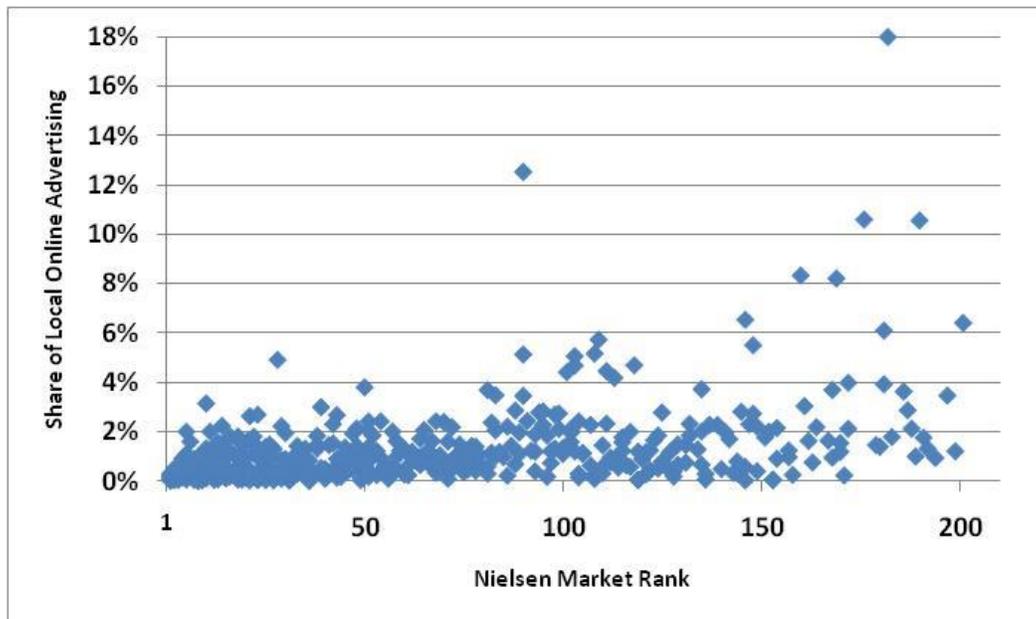
Source: Borrell Associates Inc. n=492

The more interesting numbers, however, are the “top share” for TV sites in each market category. These best-practice Web sites generate up to 12 times more revenue than average. For sites in some markets, the difference can mean several hundred thousand dollars, or even a few million. For instance, a station in a 150+-size market last year reported slightly more than \$1 million in online sales, accounting for 18 percent of all local online advertising spent there. The difference between what that station made and the average market share for its peer-group stations was more than \$900,000.

In another example, a station in a top 20 market garnered a 3.1 percent share last year while its peer group averaged 0.5 percent. The difference for that station was about \$5.8 million in additional revenue.

As the scatter gram below shows, while most TV sites continue to labor below a 1 percent share of all local online advertising, a handful of stations have broken out and are getting above 4 percent – to as high as 18 percent.

Figure 2.5 Scatter Gram: TV Sites' Share of Local Online Advertising by Market Size, 2009

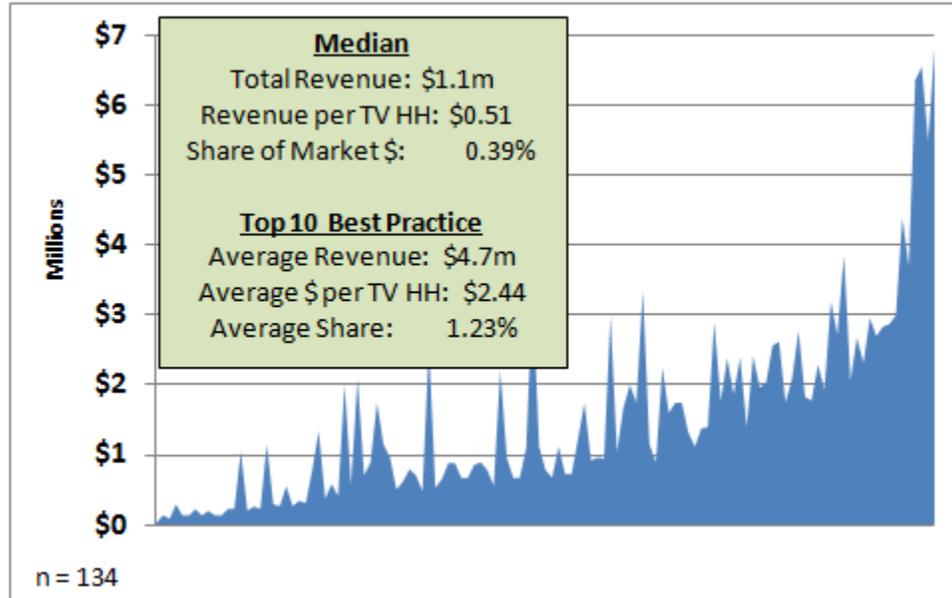


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The charts on the following pages show revenues for each of the station sites in each of four market-size groupings, with data describing medians and “best practice” TV sites. The best-practice results were obtained by averaging the total online revenue and the total online market share for the 10 highest-performing stations.

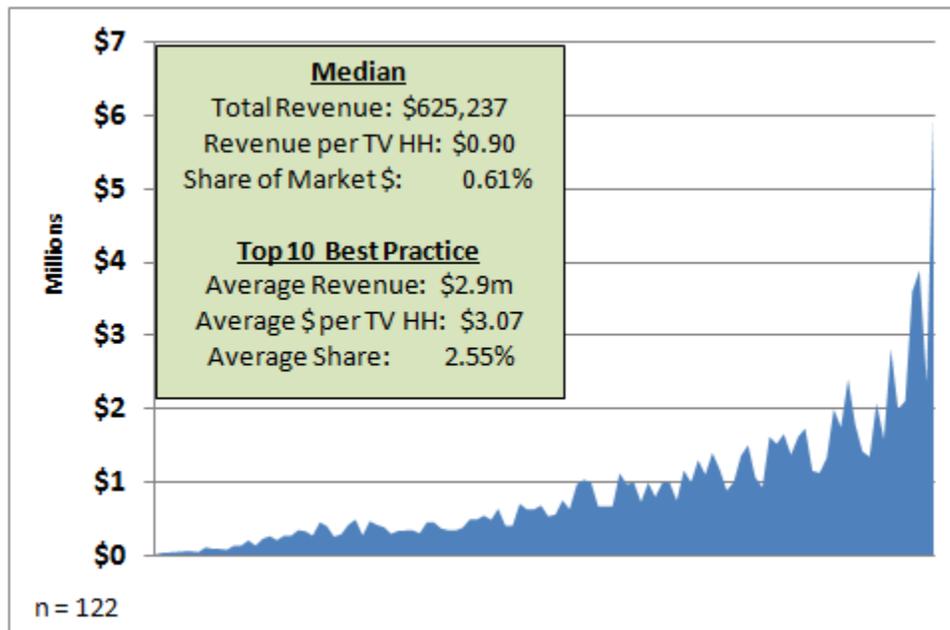
Best-practice figures provide a tempered glimpse of “what could be” for TV stations. A more interesting comparison is how all local Web sites compare – not just those operated by TV stations. The top-10 best-practice stations, for instance, have graduated to a new arena where they compete with local newspaper and pure-play Web sites, whose revenues and market shares tend to be 10 times that of an average TV station’s.

**Figure 2.6 Median & Best-Practice Benchmarking:
Markets 1-20**



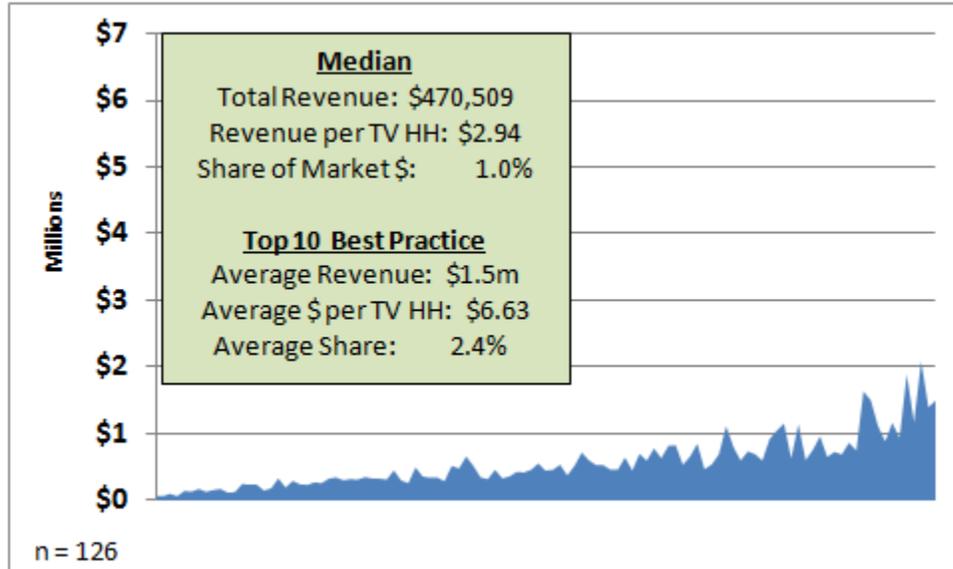
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**Figure 2.7 Median & Best-Practice Benchmarking:
Markets 21-50**



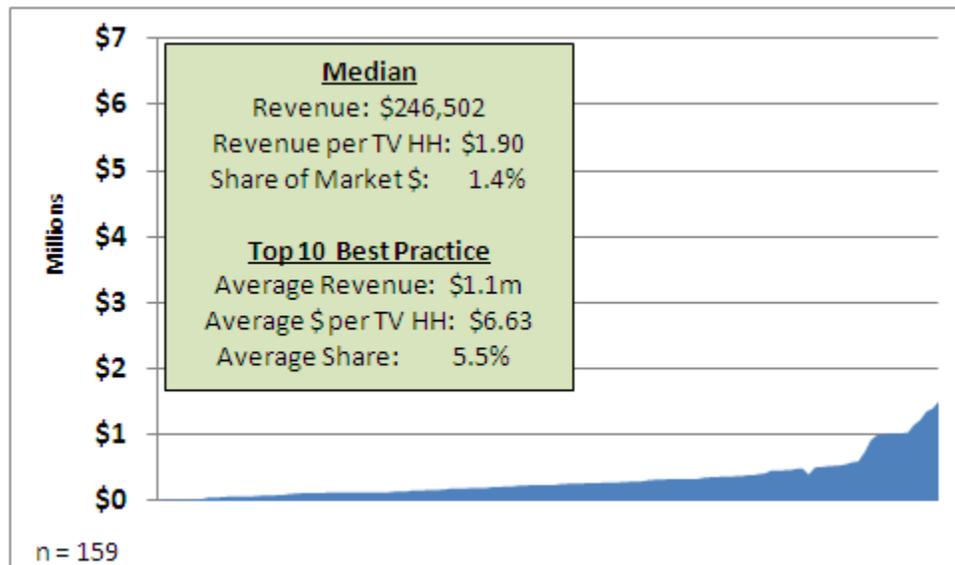
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**Figure 2.8 Median & Best-Practice Benchmarking:
Markets 51-100**



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**Figure 2.8 Median & Best-Practice Benchmarking:
Markets 101-211**



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With regard to audience, TV sites overall remained strong performers in local markets, but didn't show the gains over local newspaper sites that we have seen in the past three years. In the 95 markets measured by The Media Audit in both 2008 and 2009, a TV site led in 22 or 23 percent of those markets, while the major daily newspaper led in 73. This was a gain of 2 for TV sites in 2008, though it was due to some flip-flopping of the lead in several markets.

In the 55 markets where the most popular newspaper site (i.e., the one with the largest number of persons logging in the past month) continues to attract more traffic than the most popular TV site, the audience growth rate for the TV sites was 2 percent, while the growth rate for newspaper sites in this group was 4 percent.

In the 32 markets where the most popular newspaper site once again has a smaller audience than the most popular TV site, the TV sites grew their audience at an average of 9 percent, and the newspaper sites grew at an average of 10 percent.

There were four markets in which the most popular TV site overtook the most popular newspaper site last year (Columbia - Jefferson City, MO; Detroit, MI; Jacksonville, FL; and Norfolk, VA). Here, the newspaper audiences declined an average of 23 percent, whereas the TV site audiences grew an average of 4 percent – a 27 point differential.

In four markets – Columbus, Dayton, Memphis and Nashville – the newspaper site turned the table on the TV site, and overtook it in terms of audience size. In these markets, the newspaper sites grew their audiences an average of 30 percent, while the TV sites grew at 13 percent. In one of these markets, the #1 TV site changed during the year.

Figure 2.9 Top TV Sites vs. Top Local Newspaper Sites
(Persons Logged On In Past Month)

Markets where TV remains #1 (in 2008 and 2009)			
Albuquerque, NM	KOAT-TV	KOAT.COM	154,803
Albuquerque, NM	Albuquerque Journal	ABQJournal.com	91,192
Columbia, SC	WIS-TV	WISTV.COM	213,046
Columbia, SC	The State	THESTATE.COM	185,287
Dallas-FT. Worth, TX	WFAA-TV	WFAA.COM	1,040,150
Dallas-FT. Worth, TX	Dallas Morning News	GUIDELIVE.C/D_NEWS.COM	872,760
Denver, CO	KUSA-TV	9NEWS.COM	851,336
Denver, CO	Denver Post	DENVERPOST.COM	662,464
Grand Rapids, MI	WOOD-TV	WOODTV.COM	260,517
Grand Rapids, MI	Grand Rapids Press	MLIVE.COM	252,441
Greensboro, NC	WGHP-TV	MYFOX8.COM	266,141
Greensboro, NC	News & Record	NEWS-RECORD.COM	140,498
Greenville-Spartanburg, SC	WYFF-TV	WYFF4.COM	267,086
Greenville-Spartanburg, SC	Greenville News	GREENVILLEONLINE.COM	258,487
Hartford-New Haven, CT	WTNH-TV	WTNH/NEWSCHANNEL8.Com	381,500
Hartford-New Haven, CT	Hartford Courant	COURANT.COM	313,500
Little Rock, AR	KTHV-TV	TODAYSTHV.COM	165,000
Little Rock, AR	Arkansas Democrat-Gaz.	ARKANSASONLINE.COM	116,900
Madison, WI	WISC-TV	Channel3000.Com /WISCTV.Com	191,833
Madison, WI	Capital Times	MADISON.COM	186,697
Omaha, NE	KETV-TV	KETV.COM	166,835
Omaha, NE	Omaha World - Herald	OMAHA.COM	152,651
Raleigh-Durham, NC	WRAL-TV	WRAL.COM	607,208
Raleigh-Durham, NC	News & Observer (Raleigh)	NEWSOBSERVER.COM	445,640
Riverside-San Bern, CA	KABC-TV	ABC7.COM	418,955
Riverside-San Bern, CA	Los Angeles Times	LATIMES.COM	260,790
Salt Lake City, UT	KSL-TV	KSL.COM	910,094
Salt Lake City, UT	Deseret News	DESERETNEWS.COM	401,742
Southern New Hampshire	WMUR-TV	WMUR.COM	411,802
Southern New Hampshire	Union Leader/NH Sunday	UNIONLEADER.COM	267,509
Spokane, WA	KHQ-TV	KHQ.COM	113,300
Spokane, WA	Spokesman-Review	SPOKESMANREVIEW.COM	95,700

Source: The Media Audit, Fall 2009 Survey

Markets where TV became #1 in 2009			
Columbia-J. City, MO	KOMU-TV	KOMU.COM	52,611
Columbia-J. City, MO	Columbia Daily Tribune	COLUMBIA TRIBUNE.COM	52,128
Detroit, MI	WDIV-TV	CLICKONDETROIT.COM	897,179
Detroit, MI	Detroit News	DETROITNEWS.COM	896,450
Jacksonville, FL	WJXT-TV	NEWS4JAX.COM	344,230
Jacksonville, FL	Florida Times-Union	JACKSONVILLE.COM	328,900
Norfolk-V.B.-NprtNws, VA	WAVY-TV	WAVY.COM	254,962
Norfolk-V.B.-NprtNws, VA	Daily Press (Nprt News)	DAILYPRESS.COM	194,727

Source: The Media Audit, Fall 2009 Survey

Markets where Newspaper has regained #1 spot			
Columbus, OH	Columbus Dispatch	DISPATCH.COM	418,289
Columbus, OH	WCMH-TV	NBC41.COM	379,848
Dayton, OH	Dayton Daily News	DAYTONDAILYNEWS.COM	259,566
Dayton, OH	WHIO-TV	WHIOTV.COM	233,215
Memphis, TN	Commercial Appeal	COMMERCIALAPPEAL.COM	293,502
Memphis, TN	WREG-TV	WREG.COM	235,886
Nashville, TN	Tennessean	TENNESSEAN.COM	389,169
Nashville, TN	WTVF-TV	NEWSCHANNEL5.COM	381,815

Source: The Media Audit, Fall 2009 Survey

CHAPTER 3

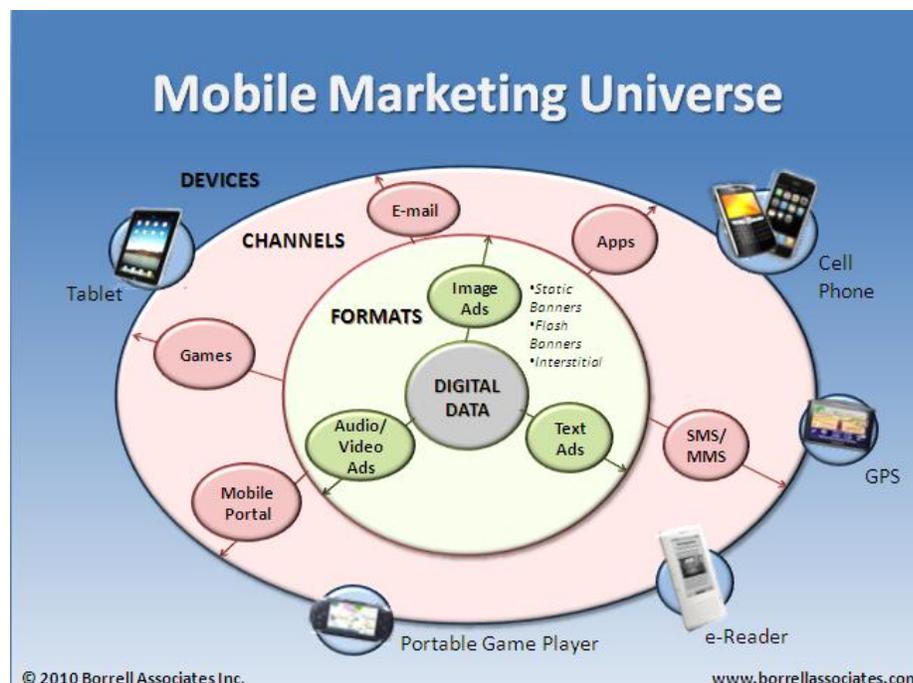
The New Disruptor: Mobile

The time span between the emergence of a disruptive advertising medium has shortened since the advent of the first electronic “new” medium – radio – in 1920. Television became the “new” medium nearly three decades later, and cable emerged as a serious disruptor three decades after that. The Internet came along nearly two decades later, and now, a scant 15 years later, yet another disruptor has emerged: mobile.

The numbers we discuss in this chapter concentrate on advertising delivered via hand-held devices such as cell phones and PDAs, iPads and eReaders, GPSs, and portable game players. They do not take into account the opportunities that lie ahead with the experimental development of Mobile DTV. Absent any significant penetration of devices able to receive the signal, we are not able to include estimates or projections of video advertising attributable to Mobile DTV.

Mobile opportunities can be complex, but arranging them in a way that shows data being formatted, pushed through one of five channels, and then delivered to a device helps explain the process. (See Fig. 3.1.) Most local media companies are focusing on delivery of content and advertising exclusively to cell phones and PDAs.

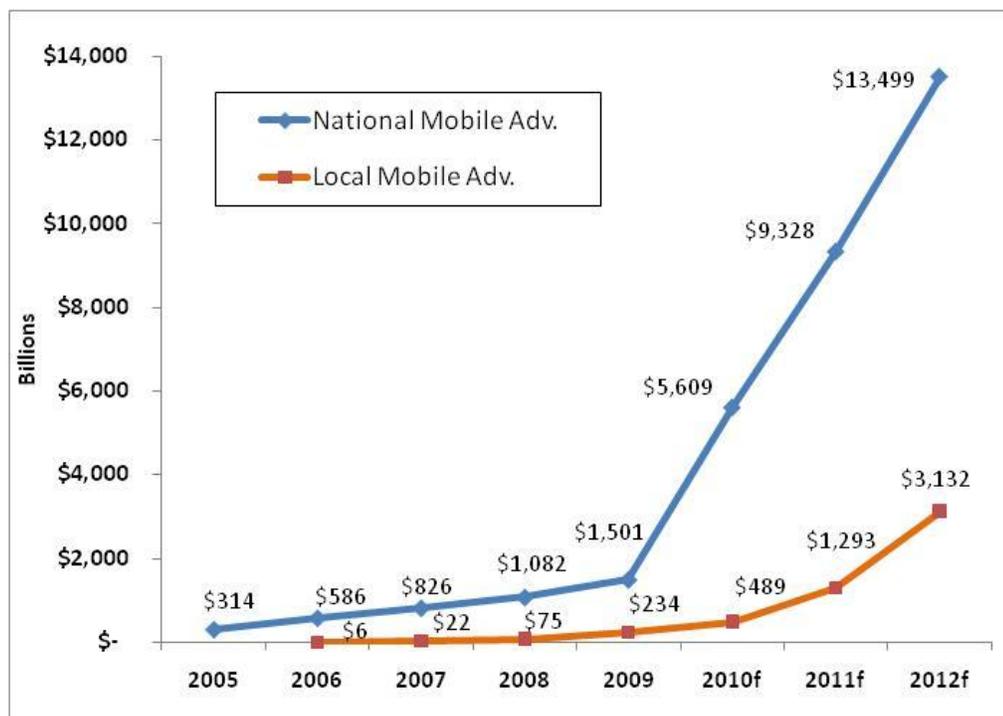
Figure 3.1 Mobile Marketing Path: Data to Devices



Mobile is not likely to “kill” any other medium, but if history is any lesson, it will siphon growth from all other media and cap or even force a decline in at least one competing medium. We think that the medium in the most trouble is the Web. Consumers are already flocking to mobile “apps” that merely draw content from the Internet rather than drive traffic to an advertising-supported Web site. Apps tend to be direct, faster and better-designed – and thus more convenient for consumers. Text-based messaging goes further with its “just the facts” approach.

It wasn't until 2008 that ad spending directed to mobile devices passed the critical milestone – \$1 billion nationwide – which allows us to accurately measure and track it with acceptable accuracy. Mobile advertising hit the \$1.7 billion mark in 2009, and the “local” portion of that was \$234 million, or about 14 percent. We expect that share to climb to about 19 percent by 2010, when local mobile advertising should reach about \$3.1 billion. If that occurs, total mobile ad spending will exceed \$16.6 billion, surpassing that of radio.

Figure 3.2 Mobile Advertising Estimates, 2005-2012



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The average TV station in our survey achieved about 2.4 percent of its total “online” revenues from mobile advertising. That would put TV mobile revenues at about \$29 million, or about 12 percent of all local mobile advertising last year. The majority came in the form of banner sponsorships on mobile video players, brief commercials within mobile video, and sponsored

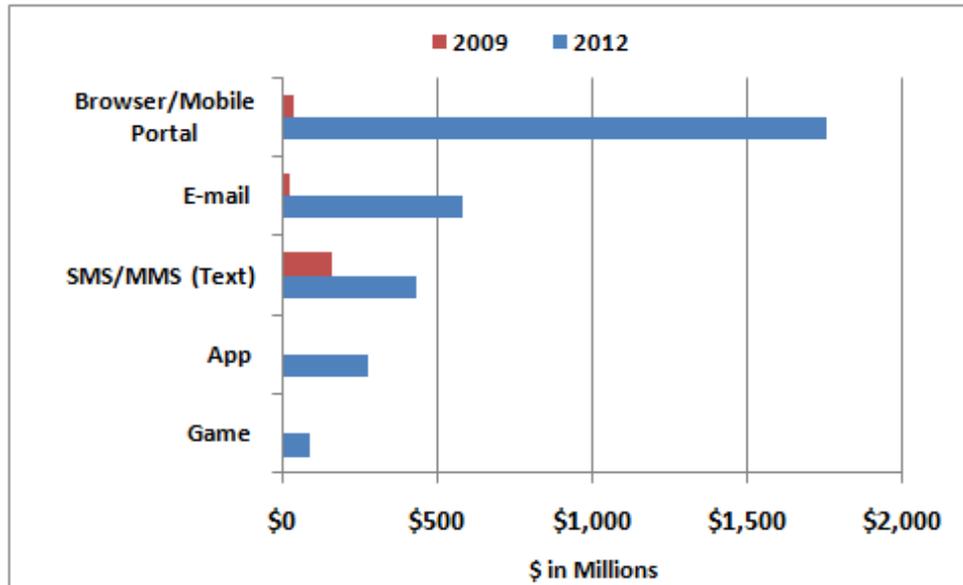
text-messaging applications. The majority of TV stations received less than \$20,000 from mobile advertising last year – hardly enough to cover associated expenses of managing, formatting and selling those applications.

When examining the opportunities in either the Web or mobile, it is important for local TV operators to focus on the segment they can control the most: local. In looking at ad spending directed to mobile devices, Figure 3.2 shows why this is so important. Right now, more than 1 in 7 mobile ad dollar spent is "national" in nature – directed and controlled by larger national advertisers. We believe this will change in the years to come, but perhaps only slightly as the ad buys might be driven by large national advertisers working directly with national apps delivered ubiquitously through wireless carriers or hardware providers (as opposed to a hodgepodge of locally developed apps.)

As mobile devices draw attention from desktops and laptops, it is important for those in the advertising industry to understand the channels that will likely carry the most commercial messages. Today, 70 percent of all local mobile advertising is text-based, typically in the form of sponsored alerts and coupons. By 2012, we expect everything to shift dramatically to browser-based advertising and "mobile portals," or Web pages that are designed to be viewed specifically on mobile devices. Some of this will be video, but the majority will likely be banner-type advertising.

We divide mobile device ad spending into six definable ad formats, although we expect that list will expand in the future. Figure 3.3 offers our current look at mobile ad spending across these formats.

Figure 3.3 Local Mobile Ad Spending by Channel, 2009 vs. 2012



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Mobile bears watching intently over the next two to three years. If history offers any lesson, however, far more will be spent debating the opportunities and rushing to build applications than will be earned. As in the early days of the World Wide Web in the late 1990s, mobile is likely to be more of a marketing opportunity and staging ground for TV stations in the next two to three years than it is a source of significant revenues.

CHAPTER 4

Top Local Online Ad Spending Categories

The top local ad-spending categories continue to be major retailers, car dealers and real estate agents – reflecting the efforts of merchandisers to meet up with consumers who are researching major purchases online. Local and state governments were also big spenders as they bought Internet advertising to educate residents and taxpayers and placed job postings to recruit employees. Health care is another large category, comprised of hospitals, outpatient clinics, physicians, and “other” health professionals such as LASIK surgeons, dentists, chiropractors and cosmetic surgeons.

**Figure 4.1 Top 25 Local Online Advertising Categories
Annual Ad Spending**

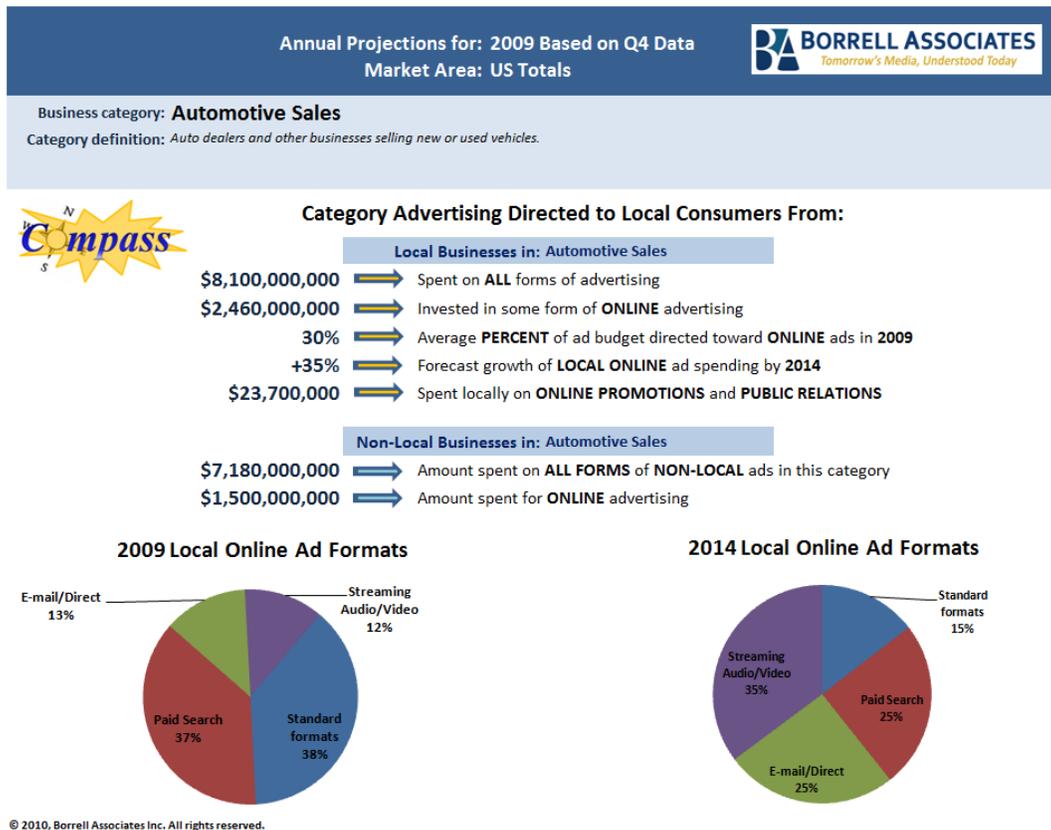
Based on Q4, 2009 data All Estimates in \$ Millions		
Description	Online - Local Ad Spending Estimate	Average Per Business Location Spending
General Merchandise Stores	\$3,270.347	\$57,103
Auto Marketing	\$2,459.228	\$22,400
Real Estate Services	\$1,519.842	\$2,913
Government	\$402.645	\$2,102
Food Stores	\$390.355	\$1,440
Retail Home Improvement	\$355.148	\$2,793
Furniture stores	\$333.056	\$4,196
Computer-related Services	\$292.637	\$1,444
Pharmacies	\$266.283	\$5,355
Credit & Mortgage Services	\$262.661	\$2,488
Telecommunications	\$235.703	\$3,567
Hospitals	\$196.062	\$10,912
DotCom Businesses	\$182.867	\$9,543
Banks	\$176.257	\$1,663
Eating and Drinking Places	\$165.437	\$319
Financial Services	\$164.901	\$1,601
Other Medical Professionals	\$126.540	\$363
Apparel and Accessory Stores	\$110.493	\$668
Miscellaneous Retail	\$108.904	\$620
Recruitment	\$91.664	\$1,373
Medical Doctors, HMOs	\$86.784	\$239
Hotels/Motels	\$75.177	\$682
Automotive Repair Services	\$65.843	\$264
Office Equipment/Supplies	\$64.243	\$2,047
Contractors-Building	\$61.469	\$127

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A surge in the use of coupons last year – and an even stronger surge in online couponing – drove other categories such as food stores, pharmacies and restaurants (“eating and drinking places” on our list) higher.⁶ Sites such as Coupons.com, Groupon, Coolsavings.com, Zip2Save.com, ShopLocal.com and others took hold with consumers. TV stations’ efforts in this area extended mainly to selling half-price gift certificates, typically for restaurants, as well as some experiments in mobile couponing.

The graphics on the following pages show the levels of local online ad spending for the U.S. market for four categories: automotive, general merchandise stores, restaurants and real estate. They show the typical advertising formats being bought by each advertiser group, as well as our forecast for changes in online spending by 2014. We are forecasting that all but one of them – automotive – will be spending less on online media four years from now.

Figure 4.2 Local Online Spending Assessment: Automotive



⁶ See our report, *What's on Sale? Coupons and Sales Circulars Move Online* (December 2009).

Figure 4.3 Local Online Spending Assessment: General Mdse.

Annual Projections for: 2009 Based on Q4 Data
Market Area: US Totals



Business category: **General Merchandise Stores**
Category definition: *Department stores, variety stores, general merchandise stores and general stores. For example: Macy's, Stein Mart, TJ Max, etc.*



Category Advertising Directed to Local Consumers From:

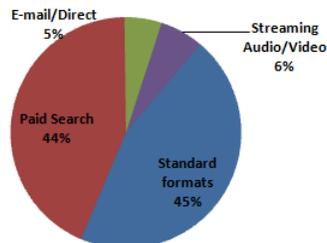
Local Businesses in: General Merchandise Stores

- \$21,000,000,000 → Spent on **ALL** forms of advertising
- \$3,270,000,000 → Invested in some form of **ONLINE** advertising
- 16% → Average **PERCENT** of ad budget directed toward **ONLINE** ads in 2009
- 1% → Forecast growth of **LOCAL ONLINE** ad spending by 2014
- \$313,000,000 → Spent locally on **ONLINE PROMOTIONS** and **PUBLIC RELATIONS**

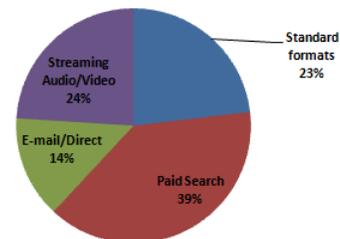
Non-Local Businesses in: General Merchandise Stores

- \$11,100,000,000 → Amount spent on **ALL FORMS** of **NON-LOCAL** ads in this category
- \$2,270,000,000 → Amount spent for **ONLINE** advertising

2009 Local Online Ad Formats



2014 Local Online Ad Formats



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Figure 4.4 Local Online Spending Assessment: Restaurants

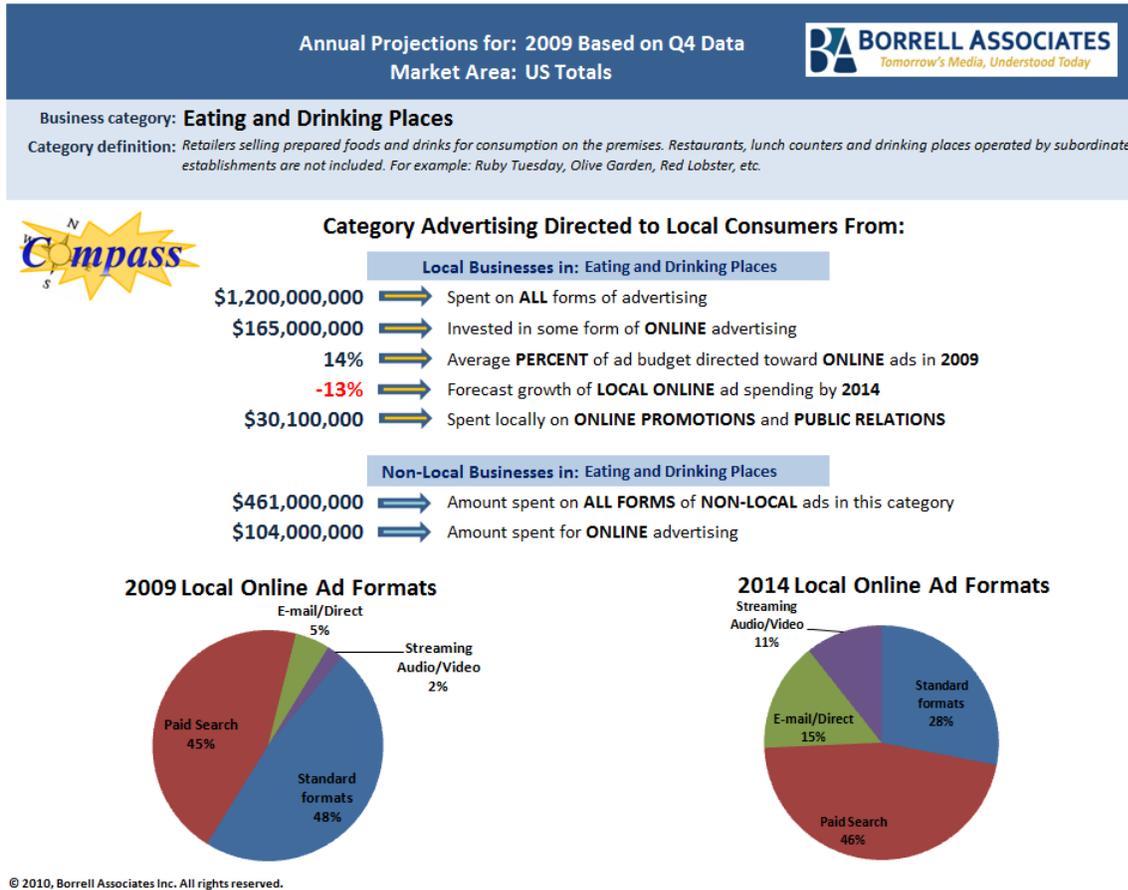


Figure 4.5 Local Online Spending Assessment: Real Estate

Annual Projections for: 2009 Based on Q4 Data
Market Area: US Totals



BORRELL ASSOCIATES
Tomorrow's Media, Understood Today

Business category: **Real Estate Services**
Category definition: *Real estate operators, and owners of real property. It also includes cemetery sub-dividers & developers.*



Category Advertising Directed to Local Consumers From:

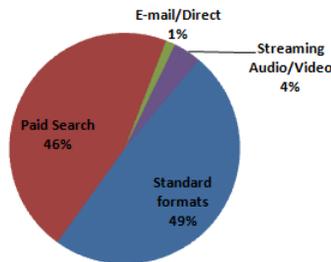
Local Businesses in: Real Estate Services

- \$3,400,000,000 → Spent on **ALL** forms of advertising
- \$1,520,000,000 → Invested in some form of **ONLINE** advertising
- 45% → Average **PERCENT** of ad budget directed toward **ONLINE** ads in 2009
- 7% → Forecast growth of **LOCAL ONLINE** ad spending by 2014
- \$51,100,000 → Spent locally on **ONLINE PROMOTIONS** and **PUBLIC RELATIONS**

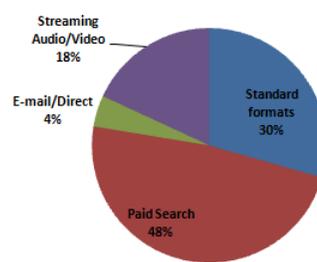
Non-Local Businesses in: Real Estate Services

- \$8,320,000,000 → Amount spent on **ALL FORMS** of **NON-LOCAL** ads in this category
- \$4,130,000,000 → Amount spent for **ONLINE** advertising

2009 Local Online Ad Formats



2014 Local Online Ad Formats



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CHAPTER 5

Conclusions & Recommendations

Benchmarking the TV industry's Web revenues certainly helps broadcasters see how well (or poorly) their interactive operations are faring compared with peers. A few hundred thousand dollars or a million or two may seem like a lot, but in the scheme of things Web-based advertising has remained a very small portion of total TV revenues. In essence, broadcasters seem to be spending a large amount of time dissecting something that typically represents less than 5 percent of total revenue.

What this report does not evaluate is the marketing value the Web brings to a station. Serving viewers with after-hours or supplemental information on news, weather or sports stories holds intrinsic value to the brand and broadcast product that is not easily measured here.

The future is not as clear anymore, either. The business of local broadcasters is no longer just a fight to grab share from local newspapers and radio, or to protect share from nibbling cable operators. The promise of the Internet is a level playing field for all: newspapers and yellow pages combined sell almost as much in online video commercials as TV stations, and many broadcasters have entered the yellow pages business by selling online directory listings or "going deep" on local news in a way that, not long ago, only printed newspapers could offer.

The local advertising marketplace continues to morph and become more complex. Just when broadcasters seem to have figured out the World Wide Web and have grown market share, a new disruptor has emerged in the form of mobile media.

As history repeats itself, the first adaptation for mobile will come in the form of "repurposed" content from another medium – just as radio started from reading newspaper stories and TV started from putting radio stars in front of cameras. The most successful adaptations will be more tailored to what the new medium *can do*, rather than what the old medium can offer it.

Where is it all headed? If history is a guide, a few local media companies will survive the mediamorphosis while others remain caterpillars. Many newspaper publishers saw the "new media" opportunity of radio in the 1920s and started local radio stations. And many publishers and radio operators grasped the new opportunity three decades later and secured VHF licenses. They morphed from "newspaper" or "radio" companies to media companies.

The troubling disconnect in the latest wave of digital media opportunities is tightly integrated content and sales staffs – something that has never happened in the past with any measure of success when tackling a newly emerging medium. The results of several years of benchmarking results for local media companies show that a canyon is opening in the local marketplace. On one side of the gorge are media companies who have – consciously or unconsciously – embraced a strategy that keeps them firmly committed to a single dominant medium. For them, interactive digital media exist to serve the core product of television (or newspapers or radio for that matter).

On the other side are companies who have begun the mediamorphosis. They are investing deeply in the future by hiring staff or outsourcing for content and sales. The top performers generate 4 to 5 times the median revenue (see Figures 2.6-2.8 in Chapter 2), something that would make headlines if it were happening with traditional broadcast revenues.

We see two simple choices ahead for broadcasters. The first is almost mandatory, and the second optional:

1. Use interactive media to support the TV station's goals.
2. Use interactive media to morph from a TV station into a media company.

The recommendation, of course, is to do both. But the process is difficult and not without investment and often against the constant gravitational pull from the core product. Serving the business that fuels 95 percent of the revenues is vital, but it makes even greater sense to invest wisely where there is far greater opportunity for upside.

APPENDIX C

Our Methodology

The statistical model underlying the advertising numbers in this report is currently used by more than 1,000 media companies in North America. It has been under continuous development since 1990 as a basic model for gauging advertising spending in any geographically defined market. The methodology is based on the concept that advertising **expenditures** are essentially equal to advertising **receipts** at the national level. The heart of the methodology is the manner in which these totals are allocated among individual counties.

We pay particular attention to online advertising and spend most of our time collecting and analyzing data from this media segment. Our model is founded on two databases:

- Database 1: An estimate of online ad **spending** by all 12 million U.S. and Canadian companies, by Standard Industrial Code (SIC), across all media channels
- Database 2: An estimate of online ad **receipts** by more than 4,400 U.S. and Canadian online media companies

The model recognizes the fact that ad revenue that is spent by advertisers located in one market may go anywhere. Similarly, a portion of Web ad spending from any other market may end up in the market being measured. Therefore, the model separates ad spending that is coming into a market from ad spending that is going out of the market. This enables us to measure online ad spending that is

- Generated and spent in a given market
- Directed to a market from elsewhere
- Generated in a market but spent elsewhere

We compile Database 1, Online Ad Spending, from sources that include Dun & Bradstreet, Interactive Advertising Bureau, AdRelevance and JupiterMedia. There are also more than 30 secondary sources, including industry research and reports as well as articles from a variety of trade publications. We then adjust the preliminary version of the Spending database in two ways:

1. To fit a market's specific media demand pattern according to Nielsen, SRC and other sources.
2. To be based on per-employee revenues, rather than on total company revenues.

The per-employee basis is an important aspect of the model. As businesses get larger, the absolute level of their online spending increases, but the per-employee amount of their online spending actually drops. The per-employee metric adjusts for company size and is therefore more reliable.

Database 2, Online Ad Receipts, is based primarily on Dun & Bradstreet, the annual financial reports of media companies, and our own database of 3,765 online media sites that participate in our annual survey. Numerous secondary sources include reports from industry and trade associations such as the Newspaper Association of America, Yellow Pages Association, Direct Marketing Association and Interactive Advertising Bureau, as well as surveys and articles from various magazines and online sources, such as Media Week and Advertising Age.

After we compile and adjust the databases, we compare them with estimates generated by companies such as McCann Erickson, Deutsche Bank, Morgan Stanley, Veronis Suhler and Jupiter. Discrepancies are analyzed to ensure that differences are due to differences in theory or methodology rather than data error.

When the databases agree, the spending estimates are distributed by SIC among all U.S. counties. This process involves three steps:

- Step 1: Allocation. Estimates are allocated to each county using the weighted values of several variables, including retail sales, households, internet usage, median income, population and median age.
- Step 2: Replacement. Whenever possible, allocated estimates are replaced by actual known information. Typically, 10 percent of the estimates are replaced.
- Step 3: Recalculation. After replacement, the sum of the estimates will no longer fit to the original national totals. So, all un-replaced estimates are re-indexed and recalculated.

The process outlined so far produces estimates of online spending directed to each county. At this point, we still don't know how much of that originates locally.

To estimate this final piece of the puzzle, we take the online spending generated in a county (from Database 1) and add to it the amount spent nationally to reach that county, and then subtract the amount spent by local companies on national sites. This leaves us with the online spending directed to the county.

This methodology has produced the local ad spending reports that our clients have relied on for years. Management consulting firm Booz Allen said, "It's the only methodology that *could* work."

Borrell Associates has compiled thousands of advertising reports for individual markets in the past five years. Media companies use them to understand the flow of online advertising through their local markets and to target specific advertising categories for sales campaigns.

Borrell Associates Inc.

Borrell Associates is a research and consulting firm that tracks local ad spending across all 11 forms of media (online, newspapers, direct mail, cable, radio, etc.) and helps media companies develop executive strategies. We produce industry-related reports, offer revenue benchmarking, give presentations to companies and trade associations, conduct online sales training and Webinars, and provide executive-level consulting services.

In addition to the expertise offered by our top-level associates, our primary strength is local fact-based analysis. Our Local Ad Spending Report (LA\$R™) and Local Online Advertising Detail (LOAD) report deliver detailed advertising data for any local market and/or spending category. An interactive report, called Compass, provides a 360-degree look at ad spending in any geographic region by medium or by advertiser category.

Borrell Associates has offices in Virginia and Washington State. Our main office is at 1643 Merrimac Trail, Suite B, Williamsburg, Virginia 23185. The telephone number is 757-221-6641.

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FOR IMMEDIATE RELEASE

BIA/Kelsey Raises Its Outlook for Television Station Revenues in 2010, as Industry Benefits From Primary Elections and Advertisers Returning to Local TV

Increase in TV station revenue for a non-presidential election year is highest in a decade

CHANTILLY, VA. June 30, 2010 – Based on encouraging indications that advertisers are returning to local television and a stronger than expected primary election year, [BIA/Kelsey](#), adviser to companies in the local media space, has raised its outlook for the television industry in 2010. In its second edition of the quarterly “[Investing In Television® Market Report](#),” BIA/Kelsey projects the industry will have overall revenues of \$18.1 billion, a 10.9 percent increase from 2009. Revenues from online sources are expected to hit \$648 million this year, representing a 25 percent growth over last year. BIA/Kelsey anticipates less dramatic positive changes in the latter half of 2010 compared with the third and fourth quarters of 2009, since the second half of last year was stronger than the first.

“There’s growing affirmation that local stations are seeing advertisers return. We see this as recognition that television is still the best method to reach large local audiences, whether the message is for a product, cause or campaign,” said Mark Fratrik, Ph.D., vice president, BIA/Kelsey. “This positive sign should help the industry invest in its infrastructure and position it for growth this decade.”

Fratrik also noted that 2010 demonstrates the television industry can sustain itself in non-presidential election years. Since 1998, non-election even-numbered years have maintained sustainable growth rates, starting with 6.3 percent that year. Four years later and coming off a recession, 2002 posted a 10.2 percent increase, while 2006 television revenues increased by 8.5 percent.

“This year holds promising revenue increases due to the unexpected competitive primary

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The Television Market Report published quarterly.

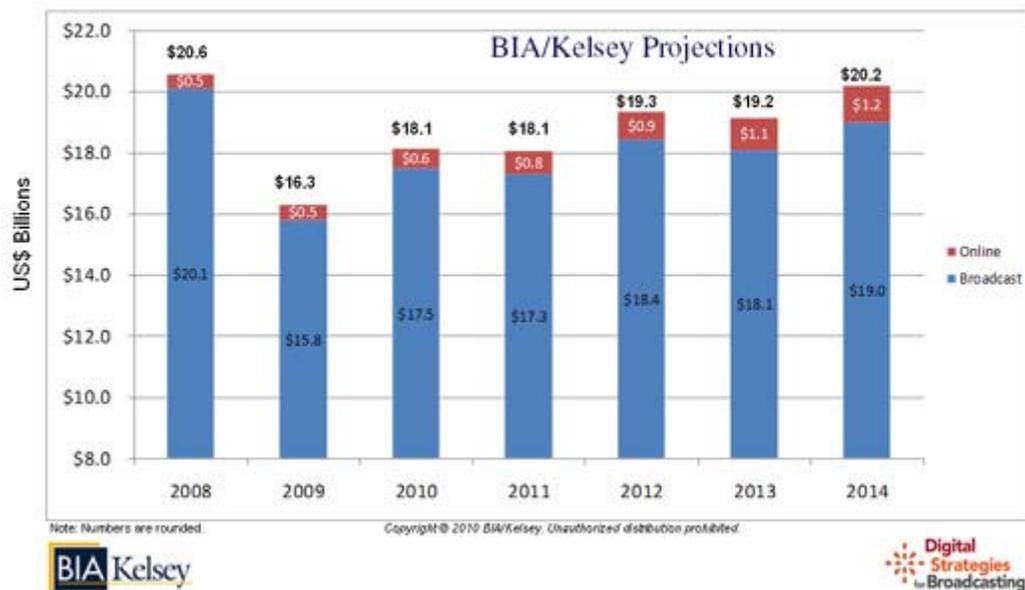
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election environment, with more than expected Senate and congressional races,” said Fratrik. “This makes up for the economy not being as strong as we all would hope.”

The chart below shows actual television station revenues from 2008 and 2009 and BIA/Kelsey’s projections through 2014.

Television Industry Revenue Growth: Broadcast and Online



[Click here for a larger image of this chart](#)

Investing In Television

The “[Investing In Television® Market Report](#)” provides comprehensive listings of all digital television stations and apportions revenues to them. This includes the 1,600-plus full-power stations and their position allocations, and the 381 stations that have secondary multicast program signals. Comprehensive profiles of all 210 television markets (plus Puerto Rico) and television market projections through 2014 are available in the second-quarter edition of the “[Investing In Television® Market Report](#)” published by BIA/Kelsey and the “[2010 Investing In Television® Ownership Report](#).” Both publications are part of the “*Investing In*” financial guide series that includes market trend analysis, demographic and economic overviews, competitive overviews, technical data, ownership data, pending and completed transactions, and Arbitron ratings. Information on these publications is available at http://www.bia.com/publications_reference_tv.asp.

BIA/Kelsey also provides the “[Investing In Television® Pocket Guide](#),” a convenient, abbreviated portable reference guide to all the television markets. The compact design of the guides allows readers to rapidly identify key markets and important station details. BIA/Kelsey also publishes investment reference guides and provides data services for the television and newspaper industries.

In-depth ad spending analysis on local markets, across traditional and interactive media, is

part of BIA/Kelsey's [Media Ad View](#), a family of reports providing research, trending and analysis across 12 media categories.

For more information, call (800) 331-5086 or e-mail info@bia.com.

About BIA/Kelsey

BIA/Kelsey advises companies in the local media space through consulting and valuation services, research, Continuous Advisory Services, and conferences. Since 1983 BIA/Kelsey has been a resource to the media, mobile advertising, telecommunications, Yellow Pages and electronic directory markets, as well as to government agencies, law firms and investment companies looking to understand trends and revenue drivers. BIA/Kelsey's annual conferences draw executives from across industries seeking expert guidance on how companies are finding innovative ways to grow. Additional information is available at www.bia.com and www.kelseygroup.com. The company's blogs are located at <http://blog.bia.com/bia/> and <http://blog.kelseygroup.com/>, and it can be found on Twitter through <http://twitter.com/BIAKelsey>.

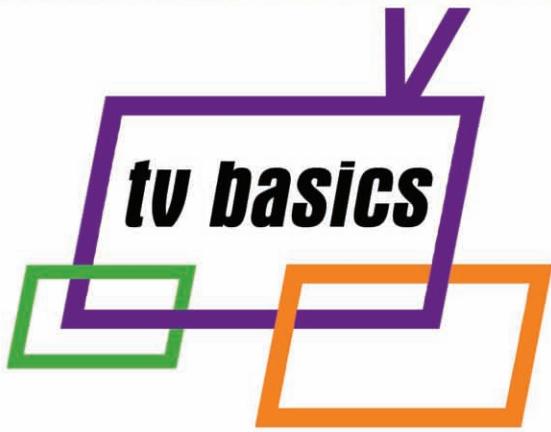
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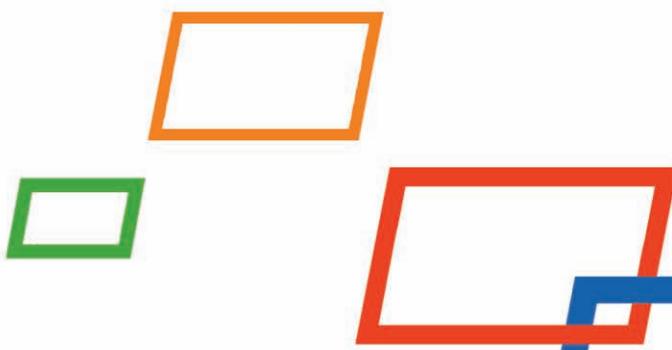
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Introduction

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 cumes. *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 98.9% 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

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 83.7%. 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		VCR	
	(000)	% TVHH	(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

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.

Among Homes With:	Home Access To:							
	% Cell Phone	% DVD Player	% Internet	% Personal Computer	% Satellite Dish	% Video Game System	% VCR	% MP3 Player
Total U.S.	89.4	87.9	79.0	82.3	29.3	37.4	70.2	46.1
Cell Phone	—	90.5	84.0	87.0	29.8	39.9	72.3	50.2
DVD Player	92.1	—	83.9	86.6	31.0	41.0	74.2	51.0
Internet	95.1	93.3	—	97.8	30.0	44.1	73.5	56.3
Personal Computer	94.6	92.5	93.9	—	29.3	42.6	73.8	53.8
Satellite Dish	91.1	93.0	81.0	82.5	—	41.4	71.6	46.1
Video Game System	95.5	96.3	93.2	93.8	32.4	—	76.9	78.7

Source: The Nielsen Company 2Q 2010 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

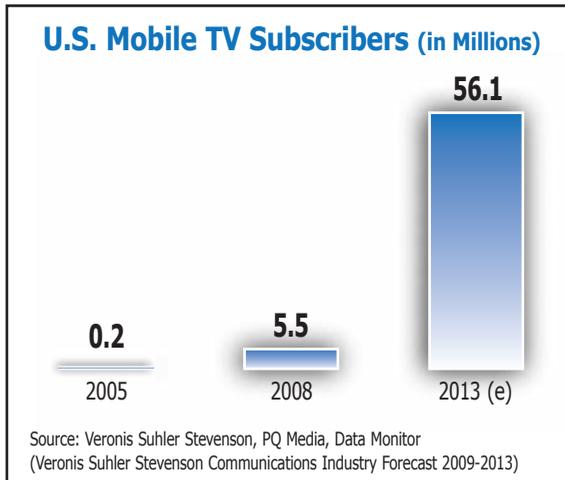
47.3 million VOD HHs with true VOD (not including simulated VOD from DirecTV and EchoStar) at the end of 4Q09.

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



Mobile Subscribers Watching Video on a Mobile Phone:

Overall Usage Number of Users 2+ (in 000's) – Monthly Reach					
Q1 2010			Q1 2009		
20,284			13,419		
Monthly Time Spent in Hours:Minutes Per Users 2+					
Q1 2010			Q1 2009		
3:37			3:37		
Monthly Time Spent in Hours:Minutes Q1 2010					
T13-17	A18-24	A25-34	A35-44	A45-54	A55-64
7:13	5:47	3:15	2:53	2:10	1:44
Video Audience Composition – Age Q1 2010					
T13-17	A18-24	A25-34	A35-44	A45-54	A55-64
19%	15%	29%	26%	10%	2%
Video Audience Composition – Gender Q1 2010					
Female 2+			Male 2+		
45%			55%		

Source: The Nielsen Company A2/M2 Three Screen report Q1'10

Mobile Ad Revs to Hit \$11.3 Billion by 2014

Mobile Advertising	
2009	2014 (forecast)
\$285 million	\$11.3 billion

Source: May'10 Borrell Associates

High Definition TV (HDTV) HD Status

While 59.3% of television households have HD capable sets, 53.9% 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

- (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 36.7%.

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

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	33	13
Study, library, office computer room	6	2
Master bedroom	64	23
Child's bedroom	23	10
Other bedroom	24	11
Kitchen	14	5
Dining room	2	1
Basement	7	3
Garage, porch, workshop, attic	4	2
Other	5	4

Source: Knowledge Networks, Inc.
The Home Technology Monitor™ 2009 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

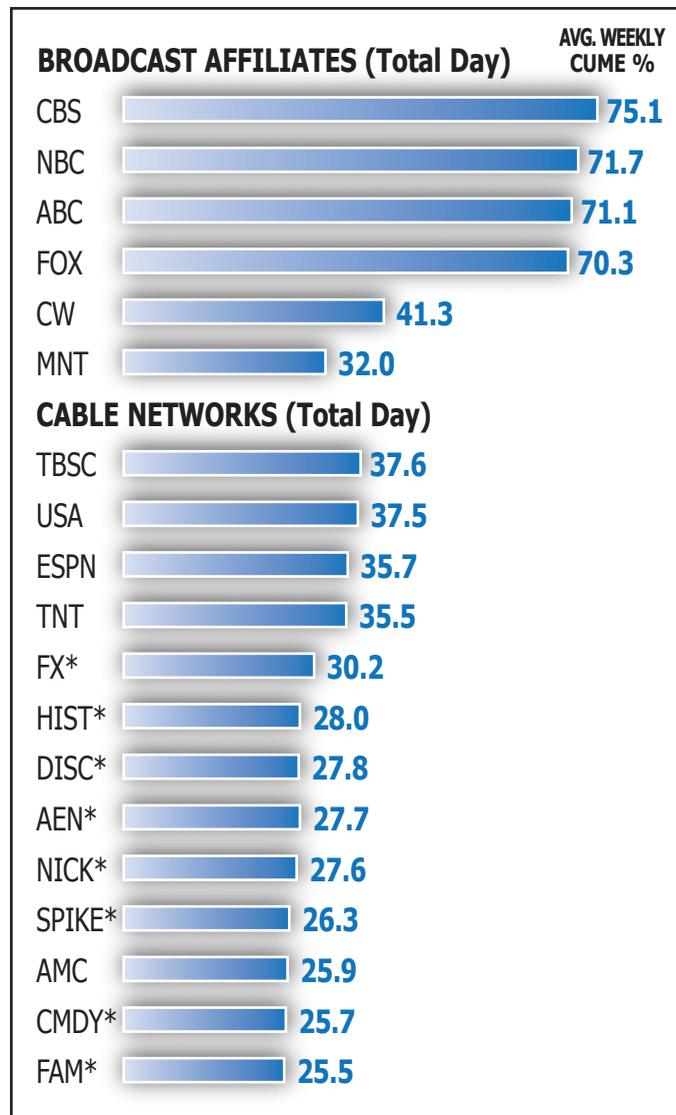
Traditionally, women in TV households have spent the most time viewing television, averaging over 5 hours a day in recent years. Men are next, with over 4.5 hours of daily viewing since 2005. Teens and children have been viewing at about the same levels, nearing the 3.5 hour mark. In 2009, Men increased 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%. By contrast, 4 of the 6 major broadcast networks reach over 70%.



Source: The Nielsen Company
Television Activity Report
NHI 4th Qtr'09
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 47.3%.

National Digital Cable Universe Estimates (%)		
	Digital Cable	Digital Cable with Pay
Jul-04	22.9	20.5
Sep-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
Sep-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
Sep-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
Sep-07	31.5	26.3
Nov-07	33.4	27.3
Feb-08	35.0	27.9
May-08	36.4	28.6
Jul-08	37.5	29.3
Sep-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
Sep-09	43.7	33.4
Nov-09	44.3	33.6
Feb-10	45.8	34.4
May-10	46.8	34.4
Jul-10	47.3	34.9

Source: The Nielsen Company, Media-Related Universe Estimates

Alternate Delivery Systems: Local

While national ADS penetration was at 30.3% in July '10, 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	ADS as % Subscription TV HH*
165	Abilene-Sweetwater	54.1	59.9
145	Albany, GA	40.4	43.2
57	Albany-Schenectady-Troy	18.4	19.8
44	Albuquerque-Santa Fe	44.0	53.0
179	Alexandria, LA	37.3	39.7
208	Alpena	29.9	32.6
131	Amarillo	48.3	54.1
150	Anchorage	20.4	23.6
8	Atlanta	38.2	40.8
114	Augusta-Aiken	31.7	34.8
48	Austin	25.8	28.8
125	Bakersfield	34.8	40.2
27	Baltimore	20.3	21.4
154	Bangor	44.2	52.4
95	Baton Rouge	26.6	28.4
141	Beaumont-Port Arthur	41.3	44.7
189	Bend, OR	25.8	30.7
169	Billings	34.6	40.3
163	Biloxi-Gulfport	24.8	26.3
157	Binghamton	22.7	24.3
40	Birmingham (Ann and Tusc)	44.9	48.1
156	Bluefield-Beckley-Oak Hill	30.3	31.7
112	Boise	46.7	64.6
7	Boston (Manchester)	13.2	13.4
182	Bowling Green	23.4	25.9
52	Buffalo	33.5	36.0
94	Burlington-Plattsburgh	39.3	43.1
190	Butte-Bozeman	40.5	48.8
196	Casper-Riverton	35.0	38.4
88	Cedar Rapids-Wtrlo-IWC&Dub	32.0	36.7
84	Champaign&Sprngfld-Decatur	35.7	39.0
97	Charleston, SC	28.9	31.6
63	Charleston-Huntington	41.9	44.7
24	Charlotte	33.7	36.7
183	Charlottesville	37.4	42.2
86	Chattanooga	33.5	36.7
197	Cheyenne-Scottsbluff	34.0	36.8
3	Chicago	27.7	31.2
130	Chico-Redding	53.4	61.7
33	Cincinnati	26.5	30.7
168	Clarksburg-Weston	45.1	47.2
18	Cleveland-Akron (Canton)	23.1	24.8
92	Colorado Springs-Pueblo	44.1	51.8
79	Columbia, SC	39.9	44.8
137	Columbia-Jefferson City	52.8	60.6
128	Columbus, GA (Opelika, AL)	26.6	28.8
34	Columbus, OH	21.2	23.7
133	Columbus-Tupelo-W Pnt-Hstn	55.9	62.9
129	Corpus Christi	31.0	34.0
5	Dallas-Ft. Worth	37.4	44.2

Source: The Nielsen Company, NSI, July 2010

*Cable and/or ADS

continued...

Alternate Delivery Systems: Local

continued...

DMA Rank	DMA Name	ADS as % of TV HH	ADS as % Subscription TV HH*
99	Davenport-R.Island-Moline	35.3	40.7
65	Dayton	22.9	27.1
16	Denver	39.2	43.3
72	Des Moines-Ames	40.6	48.2
11	Detroit	20.0	22.2
172	Dothan	35.7	38.2
139	Duluth-Superior	44.9	55.2
98	El Paso (Las Cruces)	31.2	43.0
176	Elmira (Corning)	27.4	28.9
146	Erie	32.4	37.5
119	Eugene	34.5	40.2
195	Eureka	25.6	30.6
102	Evansville	41.3	45.9
202	Fairbanks	26.9	38.1
121	Fargo-Valley City	34.3	38.8
68	Flint-Saginaw-Bay City	30.0	33.7
55	Fresno-Visalia	46.3	57.1
64	Ft. Myers-Naples	33.0	34.8
100	Ft. Smith-Fay-Sprngdl-Rgrs	39.1	43.0
107	Ft. Wayne	36.5	44.7
160	Gainesville	33.2	36.9
210	Glendive	24.6	26.8
184	Grand Junction-Montrose	33.5	38.3
41	Grand Rapids-Kalmzoo-B.Crk	32.6	37.6
192	Great Falls	46.0	51.2
70	Green Bay-Appleton	32.7	39.7
46	Greensboro-H.Point-W.Salem	30.6	33.6
103	Greenville-N.Bern-Washngtn	37.8	41.7
36	Greenvll-Spart-Ashevl-And	45.3	48.7
187	Greenwood-Greenville	35.6	38.3
87	Harlingen-Wslco-Brnsvl-McA	30.1	43.0
39	Harrisburg-Lncstr-Leb-York	26.0	27.8
178	Harrisonburg	36.3	39.5
30	Hartford & New Haven	13.6	14.0
167	Hattiesburg-Laurel	45.3	50.1
206	Helena	30.2	36.5
71	Honolulu	5.9	6.2
10	Houston	27.7	33.3
81	Huntsville-Decatur (Flor)	40.0	43.0
162	Idaho Falls-Pocatillo(Jcksn)	45.6	56.9
25	Indianapolis	27.7	31.9
90	Jackson, MS	50.9	55.4
173	Jackson, TN	36.6	40.1
47	Jacksonville	34.3	37.2
101	Johnstown-Altoona-St Colge	38.5	40.0
181	Jonesboro	31.9	34.9
147	Joplin-Pittsburg	46.9	56.1
207	Juneau	20.5	23.1
32	Kansas City	23.5	27.0
59	Knoxville	34.8	37.6
127	La Crosse-Eau Claire	34.9	39.8
191	Lafayette, IN	26.9	29.5
123	Lafayette, LA	34.9	38.1
175	Lake Charles	28.6	31.1
115	Lansing	34.6	39.1

Source: The Nielsen Company, NSI, July 2010

*Cable and/or ADS

continued...

Alternate Delivery Systems: Local

continued...

DMA Rank	DMA Name	ADS as % of TV HH	ADS as % Subscription TV HH*
188	Laredo	26.2	32.5
42	Las Vegas	26.4	29.0
62	Lexington	44.2	48.3
186	Lima	22.5	24.2
105	Lincoln & Hastings-Krny	37.2	41.8
56	Little Rock-Pine Bluff	50.6	55.4
2	Los Angeles	34.5	39.5
49	Louisville	27.8	30.8
143	Lubbock	41.2	49.5
122	Macon	46.0	49.4
85	Madison	34.0	41.2
199	Mankato	21.7	24.1
180	Marquette	26.5	28.1
140	Medford-Klamath Falls	47.0	52.1
50	Memphis	41.8	46.4
185	Meridian	56.8	63.4
17	Miami-Ft. Lauderdale	28.7	30.4
35	Milwaukee	16.5	21.4
15	Minneapolis-St. Paul	26.4	32.0
158	Minot-Bismarck-Dickinson	31.6	34.9
166	Missoula	47.5	57.4
60	Mobile-Pensacola (Ft Walt)	39.9	43.4
138	Monroe-El Dorado	46.0	50.3
124	Monterey-Salinas	38.1	41.9
118	Montgomery-Selma	33.0	35.5
104	Myrtle Beach-Florence	27.8	30.3
29	Nashville	37.6	40.8
51	New Orleans	31.6	34.1
1	New York	13.1	13.5
43	Norfolk-Portsmouth-Newport News	23.3	24.8
209	North Platte	31.5	34.9
155	Odessa-Midland	30.8	32.5
45	Oklahoma City	30.5	36.4
76	Omaha	21.6	23.9
19	Orlando-Daytona Beach-Melbourne	25.5	27.0
200	Ottumwa-Kirkville	38.6	44.7
78	Paducah-Cape Girardeau-Harrisburg	55.1	60.5
142	Palm Springs	23.3	24.3
151	Panama City	28.1	31.3
194	Parkersburg	22.7	24.1
116	Peoria-Bloomington	30.7	34.2
4	Philadelphia	16.9	17.7
12	Phoenix (Prescott)	36.4	42.1
23	Pittsburgh	22.6	23.9
22	Portland, OR	29.1	33.6
77	Portland-Auburn	24.9	27.5
205	Presque Isle	36.9	40.0
53	Providence-New Bedford	10.1	10.8
171	Quincy-Hannibal-Keokuk	46.7	53.3
26	Raleigh-Durham (Fayetteville)	32.9	36.7
174	Rapid City	31.4	34.6
108	Reno	44.0	48.4
58	Richmond-Petersburg	35.2	38.0
67	Roanoke-Lynchburg	52.4	57.6
80	Rochester, NY	17.9	20.4

Source: The Nielsen Company, NSI, July 2010

*Cable and/or ADS

continued...

Alternate Delivery Systems: Local

...continued

DMA Rank	DMA Name	ADS as % of TV HH	ADS as % Subscription TV HH*
153	Rochester-Mason City-Austin	30.9	35.0
134	Rockford	30.8	34.5
20	Sacramento-Stokton-Modesto	39.0	43.2
144	Salisbury	20.6	22.1
31	Salt Lake City	41.1	49.1
198	San Angelo	43.2	44.8
37	San Antonio	28.4	32.2
28	San Diego	12.6	13.4
6	San Francisco-Oakland-San Jose	26.6	28.6
120	Santa Barbara-San Marcos-Santa Luis Obispo	35.6	38.5
96	Savannah	39.6	41.6
13	Seattle-Tacoma	20.5	22.0
161	Sherman-Ada	50.8	57.6
82	Shreveport	59.1	64.7
148	Sioux City	33.9	39.5
113	Sioux Falls (Mitchell)	28.2	30.9
91	South Bend-Elkhart	40.1	49.2
75	Spokane	45.6	53.0
74	Springfield, MO	53.3	64.9
111	Springfield-Holyoke	14.3	15.0
201	St. Joseph	29.3	33.1
21	St. Louis	40.0	44.8
83	Syracuse	17.1	18.7
106	Tallahassee-Thomasville	40.5	43.2
14	Tampa-St. Pete (Sarasota)	16.4	17.4
152	Terre Haute	50.0	56.1
73	Toledo	26.4	30.2
136	Topeka	31.7	35.2
117	Traverse City-Cadillac	43.1	48.8
93	Tri-Cities, TN-VA	36.8	39.3
66	Tucson (Sierra Vista)	38.4	44.7
61	Tulsa	37.0	41.7
193	Twin Falls	46.1	56.3
109	Tyler-Longview (Lufkin & Nacogdoches)	56.1	60.5
170	Utica	20.3	21.8
204	Victoria	30.0	33.3
89	Waco-Temple-Bryan	38.4	42.2
9	Washington, DC (Hagerstown)	26.0	27.8
177	Watertown	23.4	25.3
135	Wausau-Rhineland	40.6	47.3
38	West Palm Beach-Ft. Pierce	27.8	28.8
159	Wheeling-Steubenville	25.6	27.3
149	Wichita Falls & Lawton	50.0	54.4
69	Wichita-Hutchinson Plus	27.6	30.8
54	Wilkes Barre-Scranton	35.2	37.2
132	Wilmington	29.1	30.9
126	Yakima-Pasco-Richland-Kennewick	50.3	57.3
110	Youngstown	24.2	27.0
164	Yuma-El Centro	43.8	53.1
203	Zanesville	25.4	26.9

Source: The Nielsen Company, NSI, July 2010

*Cable and/or ADS

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	% TV Households						% Subscription TV Households	
	SMATV	MMDS	Satellite DISH (Lg.)	DBS	TOTAL ADS	Wired Cable	ADS	Wired Cable
1996	0.9	1.3	1.8	2.1	6.0	69.5	7.9	92.5
1997	1.1	1.2	1.6	3.8	7.6	69.4	10.0	90.9
1998	0.7	0.9	1.5	5.9	9.0	69.8	11.5	89.5
1999	0.7	0.8	0.9	6.8	9.1	70.7	11.6	89.4
2000	0.8	0.6	1.0	9.2	11.4	70.2	14.2	87.2
2001	0.6	0.4	0.7	12.3	13.9	70.5	16.7	84.7
2002	0.6	0.3	0.5	15.3	16.5	69.1	19.6	82.2
2003	0.4	0.2	0.4	15.8	18.2	67.4	21.7	80.4
2004	0.5	0.0	0.3	18.5	19.2	66.4	22.7	78.6
2005	0.5	0.1	0.2	20.2	20.8	64.8	24.5	76.3
2006	0.4	0.0	0.1	24.0	24.5	62.1	28.5	72.4
2007	0.4	0.0	0.0	27.6	28.0	61.3	31.6	69.3
2008	0.3	0.0	0.0	28.4	28.7	61.3	32.2	68.8
2009	0.3	0.0	0.0	29.0	29.3	61.7	32.5	68.4

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 '09-'10 Season

Broadcast dominated the 2009-10 season, taking 98 of the top 100 programs (based on Household Live+SD ratings) as well as taking 302 of the top 312 programs.

Rank	Program	Network	HH Live + SD	
			U.S. AA%	
1	Super Bowl XLIV (6:31P)	CBS	45.1	
2	FOX NFC Championship (6:46P)	FOX	30.7	
3	Academy Awards	ABC	23.7	
4	NBC NFL Playoff Game 2	NBC	18.1	
5	Wntr Olym Open Cerem	NBC	17.8	
6	2010 Citi Bcs Nat Chmp Gm	ABC	17.3	
7	AFC Divisional Playoff-Sa	CBS	17.0	
8	Wntr Olym Wed Prime 1	NBC	17.0	
9	Oscar's Red Carpet 2010	ABC	15.3	
10	Wntr Olym Sat Prime 2	NBC	15.0	
11	Wntr Olym Thu Prime 1	NBC	14.8	
12	Grammy Awards	CBS	14.8	
13	Wntr Olym Sun Prime 1	NBC	14.5	
14	Wntr Olym Mon Prime 1	NBC	14.4	
15	Wntr Olym Sat Prime 1	NBC	14.3	
16	CBS NCAA Bskbl Champshps	CBS	14.2	
17	Wntr Olym Fri Prime 2	NBC	14.0	
18	Wntr Olym Thu Prime 2	NBC	13.9	
19	American Idol-Tuesday	FOX	13.7	
20	Wntr Olym Fri Prime 1	NBC	13.7	
21	FOX World Series Game 4	FOX	13.5	
22	Wntr Olym Sun Prime 2	NBC	13.4	
23	FOX World Series Game 6 (7:54P)	FOX	13.4	
24	FOX NFC Championship-Post	FOX	13.4	
25	American Idol-Wednesday	FOX	13.2	
26	Wntr Olym Tue Prime 2	NBC	12.8	
27	Wntr Olym Mon Prime 2	NBC	12.8	
28	Dancing With The Stars	ABC	12.6	
29	Wntr Olym Tue Prime 1	NBC	12.4	
30	Wntr Olym Close Cerem	NBC	12.3	
31	Wntr Olym Wed Prime 2	NBC	12.1	
32	American Idol Thu Sp-3/4	FOX	12.1	
33	American Idol Thu Sp-3/11	FOX	12.0	
34	FOX World Series Game 1 (7:57P)	FOX	11.9	
35	Wntr Olym Sat Prime 3	NBC	11.9	
36	FOX World Series Game 2 (7:55P)	FOX	11.7	
37	NCIS	CBS	11.4	
38	NBC Sunday Night Football	NBC	11.3	
39	American Idol Thu Sp-2/25	FOX	11.3	
40	Dancing W/ The Stars-9/22	ABC	10.7	
41	FOX World Series Game 5 (7:53P)	FOX	10.6	
42	CMA Awards	ABC	10.5	
43	The Mentalist	CBS	10.5	
44	Dancing W/Stars Result Sp	ABC	10.4	
45	Vancouver Gold	NBC	10.3	
46	Golden Globe Awards	NBC	10.1	
47	BCS Championship Pre-Game	ABC	9.9	
48	Undercover Boss	CBS	9.8	
49	Dancing W/Stars Results	ABC	9.8	
50	CSI	CBS	9.7	
51	NCIS: Los Angeles	CBS	9.7	
52	Barbara Walters Sp-3/7	ABC	9.6	
53	NCIS 9P Special	CBS	9.6	
54	FOX MLB ALCS Game 6	FOX	9.4	
55	CBS NCAA Bskbl Champ Sa-2	CBS	9.3	

Rank	Program	Network	HH Live + SD	
			U.S. AA%	
56	Bachelor: After Final Rose	ABC	9.3	
57	FOX World Series Game 3	FOX	9.1	
58	NFL Regular Season	ESPN	9.1	
59	American Music Awards	ABC	8.9	
60	Two And A Half Men	CBS	8.9	
61	Grey's Anatomy	ABC	8.9	
62	Desperate Housewives	ABC	8.8	
63	AllState Sugar Bowl	FOX	8.5	
64	The Big Bang Theory	CBS	8.5	
65	Criminal Minds	CBS	8.4	
66	The Good Wife	CBS	8.4	
67	60 Minutes	CBS	8.4	
68	Undercover Boss - Special	CBS	8.3	
69	Tostitos Fiesta Bowl	FOX	8.3	
70	Christmas At The White House	ABC	8.1	
71	CBS NCAA Bskbl-Bridge	CBS	8.1	
72	CSI: Miami	CBS	8.1	
73	Survivor: Samoa Finale	CBS	8.0	
74	45th Annual ACM Awards	CBS	7.9	
75	Survivor: Heroes-Villains	CBS	7.9	
76	CSI: NY	CBS	7.9	
77	The Bachelor	ABC	7.8	
78	Survivor: Samoa	CBS	7.8	
79	The OT	FOX	7.7	
80	Survivor:Heroes-Vill-Fnl	CBS	7.7	
81	B. Walters: 10 Most Fascinating People '09	ABC	7.6	
82	Lost: The End	ABC	7.5	
83	Big 12 Championship	ABC	7.5	
84	House	FOX	7.4	
85	CBS Sunday Movie-Special	CBS	7.4	
86	Survivor: Heroes-Vill-Wed	CBS	7.3	
87	2010 AFC-NFC Pro Bowl	ESPN	7.1	
88	CBS NCAA Bskbl Chmp Th 2	CBS	7.1	
89	V	ABC	7.1	
90	Brothers & Sisters	ABC	7.0	
90	People's Choice Awards	CBS	7.0	
92	CBS NCAA Bskbl Chmp Fr 2	CBS	7.0	
93	Super Bowl Great Commrcls	CBS	7.0	
94	Survivor: Samoa Reunion	CBS	6.9	
95	Cold Case - Special	CBS	6.9	
96	Amazing Race 15	CBS	6.8	
97	Lost	ABC	6.8	
98	Castle	ABC	6.8	
99	FedEx Orange Bowl	FOX	6.8	
100	Hallmark Hall Of Fame	CBS	6.5	

Top 10 Ad-Supported Subscription TV Programs*

58	NFL Regular Season	ESPN	9.1
87	2010 AFC-NFC Pro Bowl	ESPN	7.1
223	NBA Playoffs-Conf Fnls	ESPN	4.4
252	Kids Choice 10	NICK	4.1
265	Big Time Rush	NAN	4.0
270	2010 NBA All Star Game	TNT	3.9
281	MLB NLCS	TBSC	3.8
309	State Of The Union 2010	FXNC	3.6
311	NBA Playoffs-Conf Semis	ESPN	3.5
312	2009 Heisman Trophy	ESPN	3.5

Source: 9/21/09-5/26/10 The Nielsen Company; Programming under 25 min. excluded; Ranked by AA% (ratings); in the event of a tie, impressions (000's) are used as a tiebreaker.

*Subscription TV = programming delivered by wired cable, satellite or telecom provider.

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
18	Roots Part VI	1/28/1977	ABC	45.9
18	The Fugitive (Final Episode)	8/29/1967	ABC	45.9
20	Super Bowl XXI	1/25/1987	CBS	45.8
21	Roots Part V	1/27/1977	ABC	45.7
22	Super Bowl XXVIII	1/29/1994	NBC	45.5
22	Cheers (Final Episode)	5/20/1993	NBC	45.5
24	Ed Sullivan (The Beatles)	2/9/1964	CBS	45.3
25	Super Bowl XXVII	1/31/1993	NBC	45.1
26	Super Bowl XLIV	2/7/2010	CBS	45.0
26	Bob Hope Christmas Show	1/14/1971	NBC	45.0
28	Roots Part III	1/25/1977	ABC	44.8
29	Super Bowl XXXII	1/25/1998	NBC	44.5
30	Super Bowl XI	1/9/1977	NBC	44.4
30	Super Bowl XV	1/25/1981	NBC	44.4
32	Super Bowl VI	1/16/1972	CBS	44.2
33	XVII Winter Olympics	2/25/1994	CBS	44.1
33	Roots Part II	1/24/1977	ABC	44.1
35	Beverly Hillbillies	1/8/1964	CBS	44.0
36	Roots Part IV	1/26/1977	ABC	43.8
36	Ed Sullivan (The Beatles)	2/16/1964	CBS	43.8
38	Super Bowl XXIII	1/22/1989	NBC	43.5
39	Academy Awards	4/7/1970	ABC	43.4
40	Super Bowl XXXIV	1/30/2000	ABC	43.3
40	Super Bowl XXXI	1/26/1997	FOX	43.3
42	Thorn Birds Part III	3/29/1983	ABC	43.2
43	Super Bowl XLII	2/3/2008	FOX	43.1
43	Thorn Birds Part IV	3/30/1983	ABC	43.1
45	CBS NFC Championship	1/10/1982	CBS	42.9
46	Beverly Hillbillies	1/15/1964	CBS	42.8
47	Super Bowl VII	1/14/1973	NBC	42.7
48	Super Bowl XLI	2/4/2007	CBS	42.6
49	Thorn Birds Part II	3/28/1983	ABC	42.5
50	Super Bowl IX	1/12/1975	NBC	42.4
50	Beverly Hillbillies	2/26/1964	CBS	42.4

Source: The Nielsen Company January 1964 - February 2010
 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
11	Super Bowl XXI	1/25/1987	CBS	45.8
12	Super Bowl XXVIII	1/29/1994	NBC	45.5
13	Super Bowl XXVII	1/31/1993	NBC	45.1
14	Super Bowl XLIV	2/7/2010	CBS	45.0
15	Super Bowl XXXII	1/25/1998	NBC	44.5
16	Super Bowl XI	1/9/1977	NBC	44.4
16	Super Bowl XV	1/25/1981	NBC	44.4
18	Super Bowl VI	1/16/1972	CBS	44.2
19	XVII Winter Olympics	2/25/1994	CBS	44.1
20	Super Bowl XXIII	1/22/1989	NBC	43.5
21	Super Bowl XXXI	1/26/1997	FOX	43.3
21	Super Bowl XXXIV	1/30/2000	ABC	43.3
23	Super Bowl XLII	2/3/2008	FOX	43.1
24	NFC Championship Game	1/10/1982	CBS	42.9
25	Super Bowl VII	1/14/1973	NBC	42.7
26	Super Bowl XLI	2/4/2007	CBS	42.6
27	Super Bowl IX	1/12/1975	NBC	42.4
28	Super Bowl X	1/18/1976	CBS	42.3
29	Super Bowl XLIII	2/1/2009	NBC	42.0
30	Super Bowl XXV	1/27/1991	ABC	41.9
30	Super Bowl XXII	1/31/1988	ABC	41.9
32	Super Bowl VIII	1/13/1974	CBS	41.6
32	Super Bowl XL	2/5/2006	ABC	41.6
34	Super Bowl XXXVIII	2/1/2004	CBS	41.4
35	Super Bowl XXIX	1/29/1995	ABC	41.3
36	Super Bowl XXXIX	2/6/2005	FOX	41.1
37	Super Bowl XXXVII	1/6/2003	ABC	40.7
38	Super Bowl XXXVI	2/3/2002	FOX	40.4
38	Super Bowl XXXV	1/28/2001	CBS	40.4
40	Super Bowl XXVI	1/26/1992	CBS	40.3
41	Super Bowl XXXIII	1/31/1999	FOX	40.2
42	World Series Game #6	10/21/1980	NBC	40.0
43	Super Bowl V	1/17/1971	NBC	39.9
44	World Series Game #7	10/22/1975	NBC	39.6
45	World Series Game #4	10/6/1963	NBC	39.5
46	Super Bowl IV	1/11/1970	CBS	39.4
47	Super Bowl XXIV	1/28/1990	CBS	39.0
48	World Series Game #7	10/27/1986	NBC	38.9
49	World Series Game #7	10/20/1982	NBC	38.2
50	WBA Heavyweight Championship	9/15/1978	ABC	37.3
50	Heavyweight Boxing Championship	9/29/1977	NBC	37.3

Source: The Nielsen Company January 1964 - February 2010
 Note: Beginning 2006 estimates Live+SD. Prior to 2006 Live only.

Top 100 Sports Shows, 2009: Households

Rank	Program	Network	Start Date	HH Live + SD U.S. AA%
1	Super Bowl XLIII	NBC	2/1/09	42.1
2	Super Bowl Kick-Off	NBC	2/1/09	29.6
3	AFC Championship	CBS	1/18/09	22.0
4	NFC Championship	FOX	1/18/09	21.9
5	AFC Divisional Playoff-Su	CBS	1/11/09	19.6
6	NFC Playoff-Sun	FOX	1/11/09	18.8
7	NFC Wildcard Game	FOX	1/4/09	17.6
8	Super Bowl Pre-Game 530P	NBC	2/1/09	16.3
9	NFL Playoff Game 2	NBC	1/3/09	16.1
10	BCS Natl Championship	FOX	1/8/09	15.9
11	NFL Sunday-National	FOX	9/13/09	15.5
12	AFC Divisional Playoff-Sa	CBS	1/10/09	15.4
13	AFC Wildcard Playoff	CBS	1/4/09	15.0
14	NFC Playoff-Sat	FOX	1/10/09	13.8
15	NFL Sunday-National	CBS	9/20/09	13.6
16	World Series Game 4	FOX	11/1/09	13.5
17	World Series Game 6	FOX	11/4/09	13.4
18	NFL Playoff Game 1	NBC	1/3/09	13.1
19	NFL Thursday Special	NBC	9/10/09	12.8
20	World Series Game 1	FOX	10/28/09	11.9
21	Sunday Night Football	NBC	9/13/09	11.8
22	Super Bowl Pre-Game 5P	NBC	2/1/09	11.8
23	World Series Game 2	FOX	10/29/09	11.7
24	Rose Bowl	ABC	1/1/09	11.7
25	NFL-Thursday	CBS	11/26/09	11.6
26	SEC Championship	CBS	12/5/09	11.1
27	NFL-Thursday	FOX	11/26/09	11.1
28	NCAA Basketball Championship	CBS	4/6/09	10.8
29	World Series Game 5	FOX	11/2/09	10.6
30	Fiesta Bowl	FOX	1/5/09	10.4
31	NFL Sunday-Single	FOX	9/20/09	10.3
32	Kentucky Derby	NBC	5/2/09	9.7
33	NFL Regular Season	ESPN Sports Network	9/14/09	9.5
34	NBA Finals-Game 4	ABC	6/11/09	9.4
35	MLB ALCS Game 6	FOX	10/25/09	9.4
36	Daytona 500	FOX	2/15/09	9.2
37	World Series Game 3	FOX	10/31/09	9.1
38	NFL Sunday-Single	CBS	9/13/09	9.1
39	NFL Regular Season	ESPN	9/14/09	9.0
40	MLB All-Star Game	FOX	7/14/09	8.9
41	NBA Finals-Game 3	ABC	6/9/09	8.6
42	NCAA Bskbl Champ Sa-2	CBS	4/4/09	8.5
43	NFL Sunday-Regional	FOX	9/13/09	8.5
44	AFC Wildcard Post Game	CBS	1/4/09	8.5
45	NFL Sunday-Regional	CBS	9/20/09	8.4
46	Masters Golf Tourn.-Sun	CBS	4/12/09	8.3
47	Super Bowl Pre-Game 430P	NBC	2/1/09	8.3
48	NBA Finals-Game 2	ABC	6/7/09	8.2
49	NFL Regular Season 2	ESPN Sports Network	9/14/09	8.0
50	NBA Finals-Game 5	ABC	6/14/09	8.0

Rank	Program	Network	Start Date	HH Live + SD U.S. AA%
51	NCAA Bskbl Champ-Sa-1	CBS	4/4/09	7.9
52	NCAA Bskbl-Bridge	CBS	4/4/09	7.8
53	Sugar Bowl	FOX	1/2/09	7.8
54	NBA Finals-Game 1	ABC	6/4/09	7.8
55	NFC Wildcard Pre-Game	FOX	1/4/09	7.6
56	MLB ALCS Game 5	FOX	10/22/09	7.6
57	Big 12 Championship	ABC	12/5/09	7.5
58	NCAA Bskbl Chmp-Su-3	CBS	3/22/09	7.3
59	Super Bowl Pre-Game 4P	NBC	2/1/09	7.2
60	World Series Game 6 - Post Game	FOX	11/4/09	7.1
61	MLB All-Star Pre-Game	FOX	7/14/09	7.1
62	NFC Championship Pre-Game	FOX	1/18/09	7.0
63	NCAA Bskbl Chmp Fr 2	CBS	3/27/09	6.9
64	NCAA Bskbl Chmp Su-2	CBS	3/29/09	6.8
65	Preakness	NBC	5/16/09	6.8
66	MLB ALCS Game 4	FOX	10/20/09	6.7
67	NCAA Bskbl Chmp Th 2	CBS	3/26/09	6.7
68	NCAA Bskbl Chmp-Sa-3	CBS	3/21/09	6.7
69	PGA Championships-Sun	CBS	8/16/09	6.6
70	2009 NFL Reg Season Sat	NFL Network	12/19/09	6.6
71	NCAA Bskbl Chmp Sa-2	CBS	3/28/09	6.6
72	NFL Pre-Season	NBC	8/30/09	6.5
73	NCAA Bskbl Chmp-Sa-4	CBS	3/21/09	6.5
74	Rose Bowl Pre-Game	ABC	1/1/09	6.5
75	Capital One Bowl	ABC	1/1/09	6.4
76	NFL Today-Sun-Div-Pif	CBS	1/11/09	6.3
77	Super Bowl Pre-Game 330P	NBC	2/1/09	6.3
78	Football Nt America Pt 3	NBC	9/13/09	6.2
79	AFC Championship Pre-Game	CBS	1/18/09	6.1
80	Home Depot Prime College Football	CBS	10/10/09	6.1
81	NCAA Bskbl Champ-Post	CBS	4/6/09	6.1
82	NFC Playoff-Pre-Sat	FOX	1/10/09	5.9
83	NFL Opening Kick-Off Show	NBC	9/10/09	5.9
84	MLB ALCS Game 2	FOX	10/17/09	5.8
85	BCS Select Show	FOX	12/6/09	5.8
86	Daytona 500 Pre-Race	FOX	2/15/09	5.8
87	NCAA Bskbl Chmp-Su-2	CBS	3/22/09	5.8
88	FedEx BCS Ntl Chmp-Pre	FOX	1/8/09	5.8
89	College Ftbl Sp-Sat 1	ABC	10/17/09	5.7
90	Kentucky Derby Pre-Race	NBC	5/2/09	5.7
91	NCAA Bskbl Chp-Eve Th 1	CBS	3/19/09	5.7
92	Super Bowl Pre-Game 3P	NBC	2/1/09	5.6
93	NCAA Bskbl Chmp Th 1	CBS	3/26/09	5.6
94	NCAA Bskbl Chp-Eve Fr 2	CBS	3/20/09	5.6
95	NCAA Bskbl Chmp Fr 1	CBS	3/27/09	5.5
96	NCAA Bskbl Chmp Sa-1	CBS	3/28/09	5.4
97	Orange Bowl	FOX	1/1/09	5.4
98	NBA Playoffs-Sat 3	ABC	5/23/09	5.4
99	AFC-NFC Pro Bowl	NBC	2/8/09	5.4
100	NBA Playoffs-Conf Finals	ESPN	5/19/09	5.3

Source: 1/1-12/31/09 Nielsen Galaxy Lightning 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, 2009: Households

Rank	Event	Network	Date	U.S. AA%*
1	Academy Awards	ABC	2/22/09	20.8
2	Macy's Thanksgiving Parade	NBC	11/26/09	11.6
3	Grammy Awards	CBS	2/8/09	11.4
4	CMA Awards	ABC	11/11/09	10.5
5	Golden Globe Awards	NBC	1/11/09	9.5
6	American Music Awards	ABC	11/22/09	8.9
7	ACM Awards	CBS	4/5/09	8.9
8	Emmy Awards	CBS	9/20/09	8.8
9	Kennedy Center Honors	CBS	12/29/09	6.4
10	People's Choice Awards	CBS	1/7/09	6.1
11	Tony Awards	CBS	6/7/09	4.9
12	Tournament-Roses Parade	NBC	1/1/09	4.5
13	Tourn. Roses Parade	ABC	1/1/09	4.3
14	Disney Parks Xmas Parade	ABC	12/25/09	4.0
15	Thanksgiving Day Parade	CBS	11/26/09	3.9
16	Miss Universe Pageant	NBC	8/23/09	3.9
17	Miss USA 2009	NBC	4/19/09	3.3
18	Premio Lo Nuestro'09	UNI	3/26/09	3.1
19	Latin Grammy 09	UNI	11/5/09	3.0
20	40th NAACP Image Awards	FOX	2/12/09	2.6
21	2009 Teen Choice Awards	FOX	8/10/09	2.5
22	Kids Choice Awards	NAN	3/28/09	2.4
23	Premios Juventud 09	UNI	7/16/09	2.2
24	36th Annual Daytime Emmy	CW	8/30/09	2.0
25	Premios TV Y Nov'09	UNI	11/29/09	1.7

Source: 1/1-12/31/09 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, 2009: Adults 25-54

Rank	Event	Network	Date	A25-54 U.S. AA%*
1	Academy Awards	ABC	2/22/09	13.6
2	Grammy Awards	CBS	2/8/09	8.0
3	Macy's Thanksgiving Parade	NBC	11/26/09	7.7
4	American Music Awards	ABC	11/22/09	6.5
5	CMA Awards	ABC	11/11/09	6.3
6	Golden Globe Awards	NBC	1/11/09	5.8
7	Emmy Awards	CBS	9/20/09	5.0
8	ACM Awards	CBS	4/5/09	5.0
9	People's Choice Awards	CBS	1/7/09	3.6
10	Premio Lo Nuestro'09	UNI	3/26/09	2.8
11	Disney Parks Xmas Parade	ABC	12/25/09	2.5
12	Latin Grammy 09	UNI	11/5/09	2.5
13	Kennedy Center Honors	CBS	12/29/09	2.3
14	Tournament-Roses Parade	NBC	1/1/09	2.1
15	Miss Universe Pageant	NBC	8/23/09	2.1
16	Thanksgiving Day Parade	CBS	11/26/09	2.0
17	Tourn. Roses Parade	ABC	1/1/09	2.0
18	Tony Awards	CBS	6/7/09	1.8
19	Premios Juventud 09	UNI	7/16/09	1.6
20	40th NAACP Image Awards	FOX	2/12/09	1.6
21	Miss USA 2009	NBC	4/19/09	1.6
22	2009 Teen Choice Awards	FOX	8/10/09	1.4
23	Premios Oye	UNI	1/25/09	1.3
24	Premios Tv Y Nov'09	UNI	11/29/09	1.2
25	Screen Actors Guild Awards	TBSC	1/25/09	0.9

Source: 1/1-12/31/09 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 Reality Shows, 2009-2010 Season: Households

Rank	Program	Network	U.S. AA%*
1	American Idol-Wednesday	FOX	15.1
2	American Idol-Tuesday	FOX	14.6
3	American Idol Thu Sp-1/29	FOX	14.6
4	Amer Idl Thu Rslt Sp-3/26	FOX	13.7
5	American Idol Thu Sp-3/5	FOX	13.0
6	Dancing With The Stars	ABC	12.9
7	American Idol Thu Sp-2/26	FOX	12.6
8	Dancing W/Stars Sp-9/23	ABC	12.2
9	Bachelor:After Final Rose	ABC	11.7
10	Dancing W/Stars Results	ABC	10.7
11	Dancing W/Stars Result Sp	ABC	10.5
12	America Got Talent 9/14	NBC	8.5
13	Survivor: Gabon Finale	CBS	8.2
14	Survivor: Gabon	CBS	8.1
15	Dancing W/Stars Recap #5	ABC	7.8
16	America's Got Talent-Tue	NBC	7.8
17	Bachelor:Aft Final Rose2	ABC	7.8
18	America's Got Talent-Wed	NBC	7.5
19	Survivor: Tocantins	CBS	7.5
20	Bachelor, The	ABC	7.5
21	America Got Talent-Wed 9P	NBC	7.4
22	Survivor:Tocantins Finale	CBS	7.4
23	Survivor: Gabon Reunion	CBS	7.4
24	Dancing W/Stars Recap #4	ABC	7.1
25	Survivor:Tocantins Rnion	CBS	6.9
26	Survivor: Samoa - Special	CBS	6.8
27	Amazing Race 13	CBS	6.7
28	Superstars Of Dance 1/4	NBC	6.5
29	I Get That A Lot	CBS	6.4
30	Amazing Race 14 - Special	CBS	6.4
31	Amazing Race 14	CBS	6.3
32	Biggest Loser 7	NBC	6.3
33	Biggest Loser 8	NBC	6.2
34	Dancing W/Stars Recap	ABC	6.2
35	Extrm Makeover:Hm Ed-4/12	ABC	5.9
36	Bachelorette:After Rose	ABC	5.7
37	Biggest Loser 7 2/25	NBC	5.7
38	So You Think Cn Dance-Thu	FOX	5.7
39	Apprentice 8	NBC	5.6
40	Bachelorette, The	ABC	5.5
41	Dancing W/Stars Recap #6	ABC	5.5
42	Survivor: Gabon-Thanks Sp	CBS	5.4
43	So You Think Cn Dance-Wed	FOX	5.4
44	Biggest Loser 6	NBC	5.3
45	America's Gt Tlnt 8P 6/30	NBC	5.3
46	Survivor: Tocantins We-Sp	CBS	5.3
47	Extreme Makeover:Hm Ed-8P	ABC	5.2
48	Secret Mlnr Sp-12/3 9P	FOX	5.1
49	Superstars Of Dance	NBC	5.1
50	Dancing W/Stars Sp-5/19	ABC	5.0

Source: The Nielsen Company, Galaxy Lightning Estimates 9/21/09-5/26/10.
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, 2009-2010 Season: Adults 25-54

Rank	Program	Network	A25-54 U.S. AA%*
1	American Idol-Wednesday	FOX	11.5
2	American Idol-Tuesday	FOX	11.5
3	American Idol Thu Sp-1/29	FOX	11.4
4	Amer Idl Thu Rslt Sp-3/26	FOX	9.9
5	American Idol Thu Sp-3/5	FOX	9.8
6	American Idol Thu Sp-2/26	FOX	9.3
7	Bachelor:After Final Rose	ABC	7.6
8	Dancing W/Stars Sp-9/23	ABC	6.4
9	Dancing With The Stars	ABC	6.3
10	Survivor: Gabon Finale	CBS	6.1
11	Survivor: Gabon	CBS	5.8
12	Survivor:Tocantins Finale	CBS	5.6
13	Survivor:Tocantins Rnion	CBS	5.3
14	Survivor: Tocantins	CBS	5.3
15	Survivor: Gabon Reunion	CBS	5.2
16	Dancing W/Stars Results	ABC	5.2
17	Bachelor:Aft Final Rose2	ABC	4.8
18	Dancing W/Stars Result Sp	ABC	4.8
19	Biggest Loser 7	NBC	4.7
20	Survivor: Samoa - Special	CBS	4.6
21	Bachelor, The	ABC	4.6
22	Amazing Race 14 - Special	CBS	4.5
23	America's Got Talent-Tue	NBC	4.4
24	Hell's Kitchen	FOX	4.4
25	Biggest Loser 8	NBC	4.4
26	Amazing Race 13	CBS	4.4
27	Apprentice 8	NBC	4.3
28	America Got Talent 9/14	NBC	4.3
29	I Get That A Lot	CBS	4.3
30	Amazing Race 14	CBS	4.3
31	Hell's Kitchen Sp-7/21 9P	FOX	4.2
32	America's Got Talent-Wed	NBC	4.2
33	America Got Talent-Wed 9P	NBC	4.0
34	Biggest Loser 7 2/25	NBC	3.9
35	Biggest Loser 6	NBC	3.8
36	So You Think Cn Dance-Thu	FOX	3.8
36	Extrm Makeover:Hm Ed-4/12	ABC	3.8
38	Superstars Of Dance 1/4	NBC	3.8
39	So You Think Cn Dance-Wed	FOX	3.7
40	Secret Mlnr Sp-12/3 9P	FOX	3.6
41	Survivor: Gabon-Thanks Sp	CBS	3.5
42	True Beauty	ABC	3.4
43	Extreme Makeover:Hm Ed-8P	ABC	3.3
44	Big Brother 11-Tue	CBS	3.3
45	Bachelorette:After Rose	ABC	3.3
46	Bachelorette, The	ABC	3.2
47	Dancing W/Stars Recap #5	ABC	3.2
48	Survivor: Tocantins We-Sp	CBS	3.2
49	Wipeout	ABC	3.2
50	Biggest Loser 6 10/8	NBC	3.1

Source: The Nielsen Company, Galaxy Lightning Estimates 9/21/09-5/26/10.
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)			HHL	HHL
Rank	Program	Syndicator	U.S. AA%	U.S.** GAA%
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	Mauri	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	A25-54
Rank	Program	Syndicator	U.S. AA%	U.S.** GAA%
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	Mauri	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

Source: Television & Cable Factbook, Jan. each year

Advertising Expenditures by Medium: 3-Year Track

In 2009 advertising on broadcast television – including Spot TV, Syndication and Network TV – represented nearly 36% of total measured media expenditures. In the latest indication of the increasingly good health of local broadcast TV, Spot Television revenues were up 24.4% in the first half of 2010, compared to the same period in 2009.

MEDIA	2007		2008		2009	
	\$ in Millions	Annual Growth/Decline	\$ in Millions	Annual Growth/Decline	\$ in Millions	Annual Growth/Decline
Spot TV	17,238	-9.6%	16,932	-1.8%	12,922	-23.7%
Share %	12.4%		12.6%		10.9%	
Syndication	4,173	-1.5%	4,445	6.5%	4,229	-4.9%
Share %	3.0%		3.3%		3.6%	
Network TV*	27,238	-1.0%	27,288	0.2%	25,341	-7.1%
Share %	19.6%		20.4%		21.4%	
Cable TV**	19,108	9.7%	19,733	3.3%	19,479	-1.3%
Share %	13.8%		14.7%		16.4%	
Magazines	25,652	6.7%	23,741	-7.5%	19,457	-18.0%
Share %	18.5%		17.7%		16.4%	
Sun Magazines	2,000	4.1%	1,904	-4.8%	1,695	-11.0%
Share %	1.4%		1.4%		1.4%	
Local Magazines	473	-3.8%	403	-14.8%	332	-17.6%
Share %	0.3%		0.3%		0.3%	
Nat'l Newspapers	3,347	-5.6%	2,962	-11.5%	2,435	-17.8%
Share %	2.4%		2.2%		2.1%	
Newspapers	22,777	-5.5%	20,105	-11.7%	16,037	-20.2%
Share %	16.4%		15.0%		13.5%	
Network Radio	1,002	-0.2%	975	-2.7%	890	-8.7%
Share %	0.7%		0.7%		0.8%	
Nat'l Spot Radio	2,489	-7.6%	2,115	-15.0%	1,580	-25.3%
Share %	1.8%		1.6%		1.3%	
US Internet	9,243	-5.2%	9,645	4.3%	10,848	12.5%
Share %	6.7%		7.2%		9.2%	
Outdoor	3,983	4.0%	3,721	-6.6%	3,185	-14.4%
Share %	2.9%		2.8%		2.7%	
GRAND TOTAL	138,722	-0.7%	133,969	-3.4%	118,428	-11.6%

* Network Television includes both English- and Spanish-language networks.

** Cable Network Television only; data for local Cable is not available.

Source: TVB analysis of Kantar Media data.

Top 25 Spot TV Advertisers*

In 2009, Verizon Communications was the top Spot TV advertiser with nearly \$270 million, followed by AT&T with almost \$240 million.

Rank	Advertiser	2009
1	Verizon Communications Inc	\$268,670,700
2	AT&T Inc	237,178,400
3	Ford Motor Co Dlr Assn	228,833,200
4	Chrysler Group LLC	223,646,400
5	Honda Motor Co Ltd	209,075,500
6	Toyota Motor Corp Dlr Assn	201,946,800
7	General Mills Inc	199,744,900
8	Comcast Corp	185,534,600
9	McDonalds Corp	141,921,400
10	Yum Brands Inc	132,757,300
11	Time Warner Cable Inc	114,158,300
12	General Motors Corp	108,760,200
13	Toyota Motor Corp	108,286,900
14	Toyota Motor Corp Loc Dlr	103,142,100
15	Wendys Arbys Group Inc	90,504,500
16	Berkshire Hathaway Inc	88,904,900
17	Doctors Assoc Inc	83,744,900
18	Empire Today LLC	79,653,900
19	Nissan Motor Co Ltd	77,451,500
20	Procter & Gamble Co	74,700,200
21	DirecTV Group Inc	74,375,300
22	Volkswagen AG Dlr Assn	71,572,200
23	Hyundai Corp Dlr Assn	69,165,500
24	ITT Educational Services Inc	69,074,500
25	Ford Motor Co	69,023,200

*Includes both local and national spot activity
Source: Television Bureau of Advertising from estimates supplied by Kantar Media.
Top 100 markets.

Top 25 Spot TV Categories*

The Automotive category tops the list at over \$1.7 billion, while Communications/Telecommunications comes in at No. 2 with \$1.3 billion. Restaurants is No. 3, followed by Car & Truck Dealers and Furniture Stores.

Rank	Category	2009
1	Automotive	\$1,711,924,500
2	Communications/Telecommunications	1,322,351,300
3	Restaurants	1,132,257,400
4	Car & Truck Dealers	539,614,800
5	Furniture Stores	515,655,600
6	Insurance	495,711,400
7	Schools, Colleges & Camps	446,688,600
8	Financial	440,539,300
9	Food and Food Products	433,390,900
10	Legal Services	411,343,700
11	Travel, Hotels & Resorts	396,144,300
12	Government and Organizations	388,512,700
13	Leisure Time Activities & Events	345,339,800
14	Food Stores & Supermarkets	256,720,200
15	Motion Pictures	213,465,800
16	Media & Advertising	142,770,700
17	Prescription Medication & Pharmaceutical Houses	138,228,900
18	Home Centers & Hardware Stores	110,783,700
19	Political	109,240,700
20	Household Soaps, Cleaners, Polishes & Supplies	104,146,600
21	Clothing Stores	103,011,200
22	Discount Department Stores	96,560,400
23	Toiletries & Cosmetics	92,939,400
24	Medicines and Remedies (excluding Rx)	84,718,400
25	Department Stores	75,839,400

*Includes both local and national spot activity
Source: Television Bureau of Advertising from estimates supplied by Kantar Media.
Top 100 markets.

Top 25 Syndicated TV Categories

Toiletries & Cosmetics, with over \$500 million, tops the list of syndicated advertising categories. Medicines & Remedies (excluding Rx), with close to \$400 million and Prescription Medication & Pharmaceutical Houses, with over \$360 million, round out the top three.

Rank	Category	2009
1	Toiletries & Cosmetics	\$500,644,600
2	Medicines and Remedies (excluding Rx)	397,367,000
3	Prescription Medication and Pharmaceutical Houses	361,809,600
4	Household Soaps, Cleaners, Polishes & Supplies	261,892,700
5	Restaurants	246,838,400
6	Communications/Telecommunications	244,386,000
7	Insurance	218,327,200
8	Food and Food Products	200,187,400
9	Discount Department Stores	184,745,900
10	Motion Pictures	131,766,800
11	Automotive	113,953,200
12	Confectionery & Snacks	97,106,200
13	Financial	89,779,600
14	Beverages	60,687,100
15	Audio and Video Equipment & Supplies	54,941,100
16	Clothing Stores	54,324,800
17	Department Stores	49,522,700
18	Consumer Electronics & Video Stores	45,953,800
19	Pets, Pet Foods & Supplies	41,159,500
20	Household Appliances & Equipment	40,797,200
21	Games, Toys and Hobbycraft	36,330,200
22	Schools, Colleges & Camps	35,112,500
23	Media & Advertising	29,262,800
24	Legal Services	29,134,600
25	Home Centers & Hardware Stores	26,874,700

Source: Television Bureau of Advertising 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 2009. Topping the list was Automotive with over \$2.4 billion; Communications/Telecommunications followed with almost \$2.2 billion, and Prescription Medication & Pharmaceutical Houses came in third with almost \$1.7 billion.

Rank	Category	2009
1	Automotive	\$2,433,283,100
2	Communications/Telecommunications	2,198,044,800
3	Prescription Medication & Pharmaceutical Houses	1,683,099,800
4	Restaurants	1,421,493,800
5	Motion Pictures	1,283,609,800
6	Financial	1,079,157,400
7	Toiletries & Cosmetics	1,078,929,400
8	Food and Food Products	868,933,700
9	Medicines and Remedies (excluding Rx)	700,744,300
10	Insurance	653,697,300
11	Discount Department Stores	554,429,200
12	Household Soaps, Cleaners, Polishes & Supplies	519,390,300
13	Beverages	504,430,700
14	Computers and Software	491,101,200
15	Beer & Wine	484,263,900
16	Department Stores	404,930,500
17	Audio and Video Equipment & Supplies	379,747,600
18	Confectionery & Snacks	317,817,500
19	Home Centers & Hardware Stores	279,217,400
20	Travel, Hotels & Resorts	273,539,200
21	Media & Advertising	235,400,900
22	Games, Toys and Hobbycraft	212,289,400
23	Clothing Stores	204,114,200
24	Apparel, Footwear and Accessories	146,063,800
25	Pets, Pet Foods & Supplies	130,373,900

Source: Television Bureau of Advertising from estimates supplied by Kantar Media.

Top 25 Subscription TV Categories (Network)

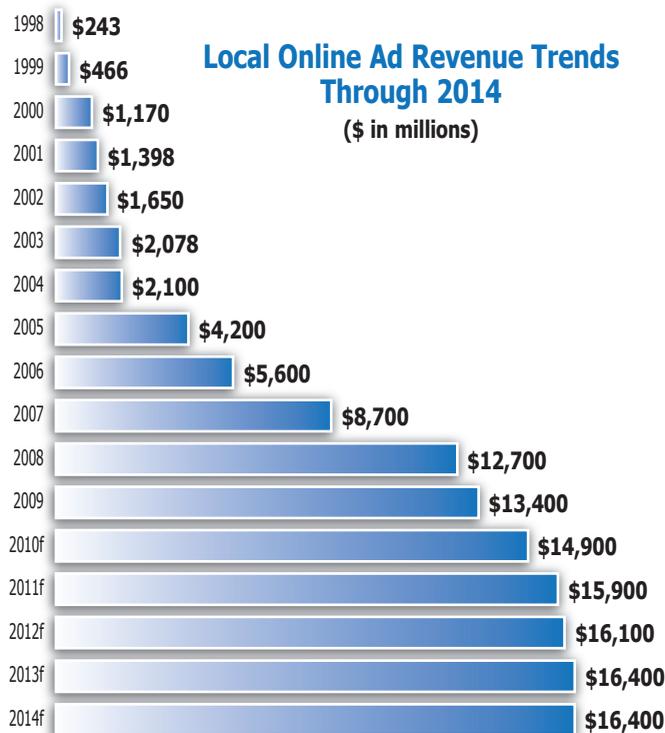
Restaurants, with over \$1.2 billion, tops the list of subscription TV network advertising categories. Automotive (over \$1.1 billion) and Communications/Telecommunications (just over \$1 billion) round out the top three.

Rank	Category	2009
1	Restaurants	\$1,228,891,700
2	Automotive	1,127,216,500
3	Communications/Telecommunications	1,097,458,400
4	Food and Food Products	1,046,728,200
5	Toiletries & Cosmetics	985,584,400
6	Motion Pictures	923,147,000
7	Insurance	850,653,500
8	Financial	698,942,800
9	Household Soaps, Cleaners, Polishes & Supplies	670,879,400
10	Games, Toys and Hobbycraft	652,089,300
11	Prescription Medication & Pharmaceutical Houses	643,358,300
12	Medicines and Remedies (excluding Rx)	596,644,400
13	Audio and Video Equipment & Supplies	386,001,400
14	Confectionery & Snacks	369,537,700
15	Discount Department Stores	364,899,400
16	Travel, Hotels & Resorts	361,284,500
17	Media & Advertising	323,295,200
18	Beverages	322,896,000
19	Beer & Wine	280,911,200
20	Computers and Software	247,224,700
21	Department Stores	217,456,900
22	Household Appliances & Equipment	168,643,800
23	Apparel, Footwear and Accessories	151,699,600
24	Home Centers & Hardware Stores	146,474,700
25	Government and Organizations	145,821,900

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

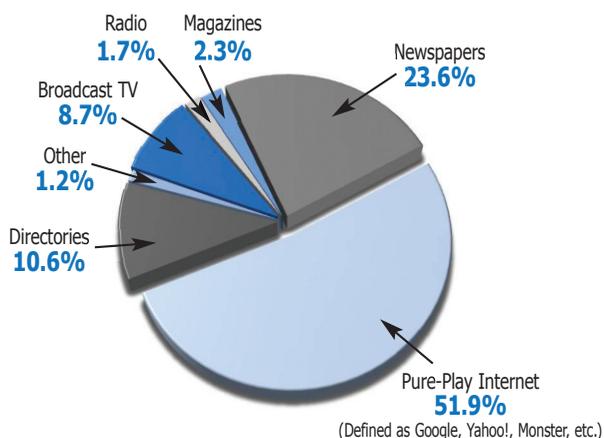
Total Local Online Advertising

Local online advertising enjoyed double-digit growth from 1998 through 2008. Ad revenue growth slowed to 5% in 2008, but is expected to grow to over 11% in 2010. Continued growth is projected through 2013.



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2009 Local Online Ad Revenues by Media Choice



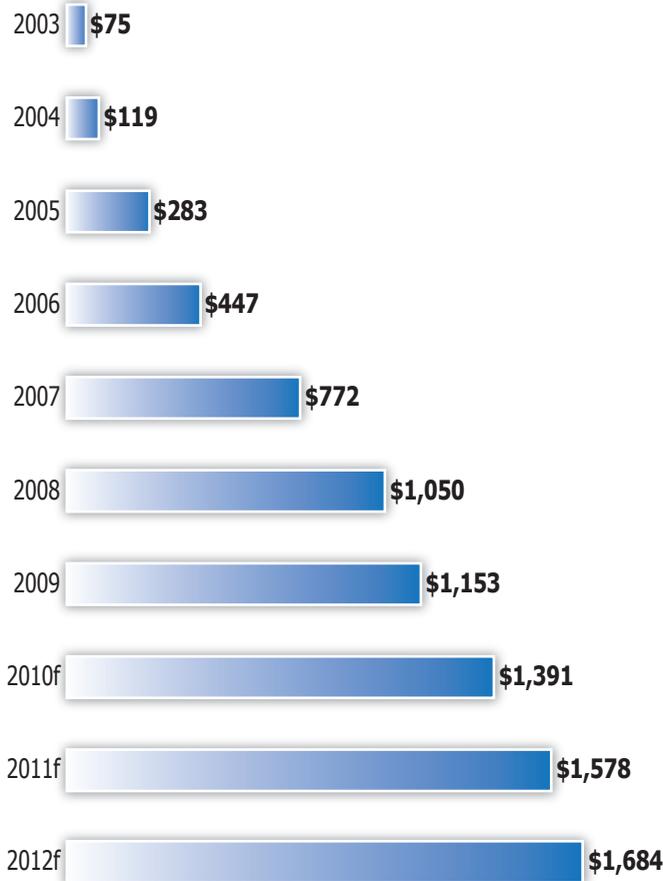
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Local Station Website Strength

Local broadcasters launched hyperlocal sites in 2009 and attracted new local advertisers. Many companies have been building web revenues through telemarketing sales and reducing their dependence on display advertising, with mobile and video advertising assuming a greater role in 2009. These new initiatives resulted in a jump to \$1.15 billion in online revenues in 2009.

Local stations saw online revenues increase an average of 10 percent, from \$1.05 billion in 2008 to \$1.15 billion in 2009. Revenues for 2010 are estimated at \$1.39 billion and are expected to increase 21% to \$1.68 billion in 2012.

Local Broadcast TV Web Revenues
(\$ in millions)

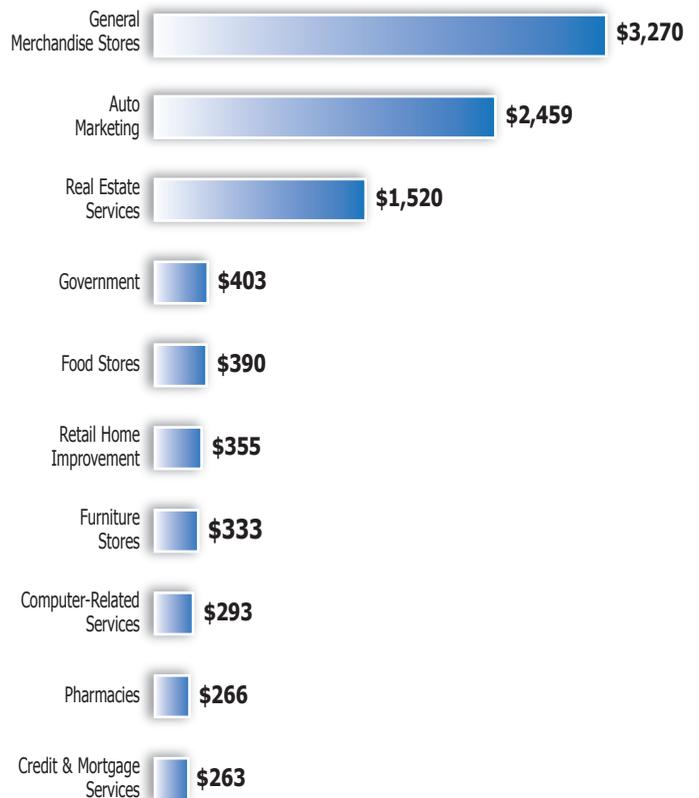


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Top Categories for Local Online Advertising

Three key local business categories spent over \$1 billion in local online advertising in 2009. They are General Merchandise Stores, which spent \$3.27 billion, Auto Marketing, which spent \$2.46 billion, and Real Estate Services, estimated to have spent \$1.52 billion.

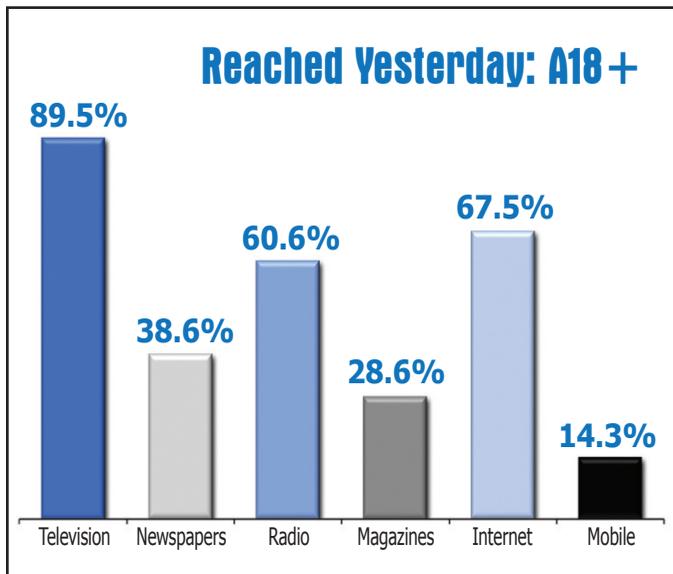
2009 Online Local Ad Spending Estimate
(\$ in millions)



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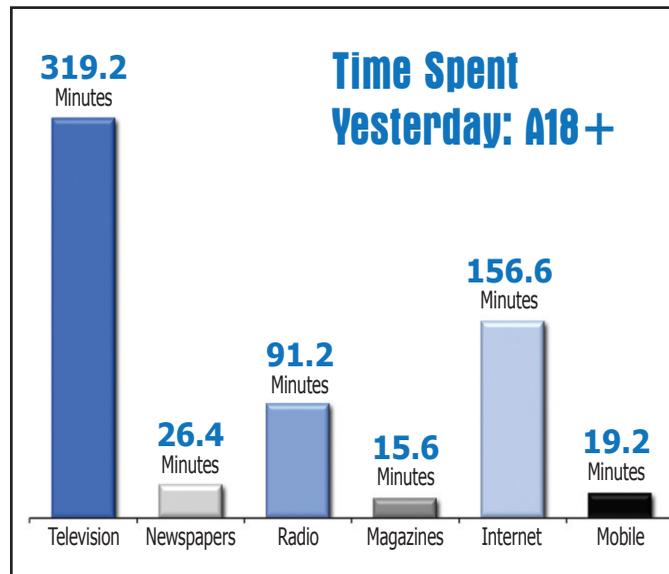
Television Reaches More Adults Each Day Than Other Medium

Television reaches almost 90% of adults 18+ in the average day, while radio reaches approximately 61% and newspapers, 39%. 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.



Adults Reached Yesterday by Major Media (%)

	Television	Newspapers	Radio	Magazines	Internet	Mobile
Adults 18+	89.5	38.6	60.6	28.6	67.5	14.3
Adults 18-49	85.9	30.2	61.7	25.3	75.3	18.9
Adults 25-54	88.0	35.1	67.0	27.9	73.1	16.8
Men 18+	90.9	41.6	62.8	23.7	66.9	14.9
Men 18-49	88.1	32.4	61.2	21.4	73.4	20.2
Men 25-54	89.1	37.4	67.7	23.3	71.4	18.6
Women 18+	88.2	35.7	58.4	33.2	68.0	13.7
Women 18-49	83.7	28.0	62.3	29.1	77.3	17.7
Women 25-54	87.1	33.0	66.3	32.1	74.7	15.2

Time Spent Yesterday in Minutes With Major Media

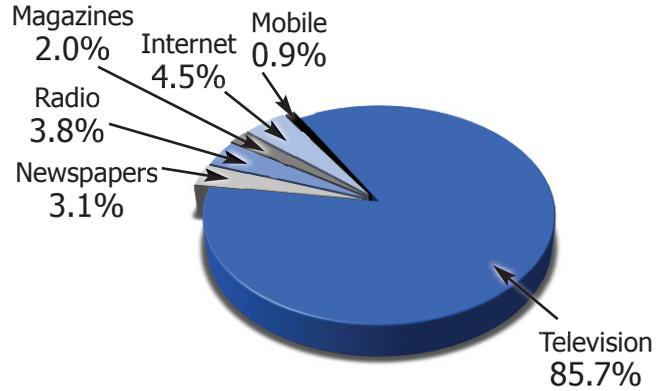
	Television	Newspapers	Radio	Magazines	Internet	Mobile
Adults 18+	319.2	26.4	91.2	15.6	156.6	19.2
Adults 18-49	267.6	19.2	90.6	13.8	181.2	25.2
Adults 25-54	283.8	21.6	106.2	15.0	160.2	19.2
Men 18+	323.4	29.4	90.0	13.2	159.0	19.2
Men 18-49	268.8	19.2	87.6	13.8	178.2	23.4
Men 25-54	284.4	20.4	100.2	13.2	157.2	19.2
Women 18+	315.0	24.0	91.8	17.4	154.2	19.2
Women 18-49	267.0	19.2	93.0	13.8	183.6	27.0
Women 25-54	283.2	22.8	111.6	17.4	163.2	19.2

Source: TVB Media Comparisons Study 2010. Knowledge Networks Inc. Custom Survey.

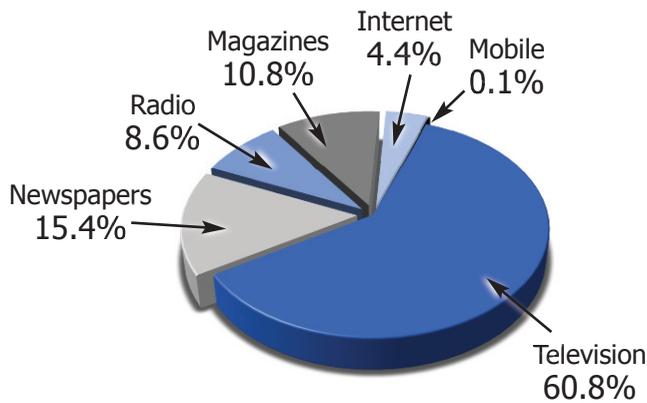
Television Advertising has the Best Perception Among Adults 18 +

The public's perception of advertising in media is critical in the process of selling products and services. Television dominates in the delivery of advertising that is authoritative, exciting, influential, persuasive and engaging.

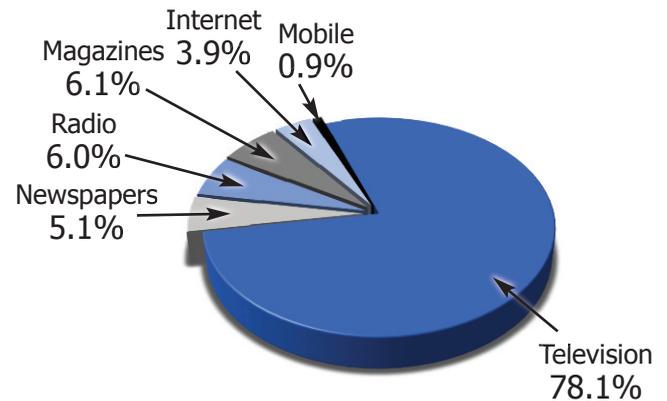
Most Influential



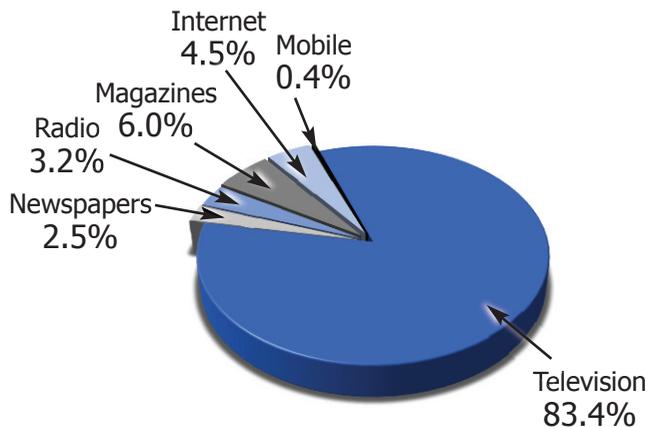
Most Authoritative



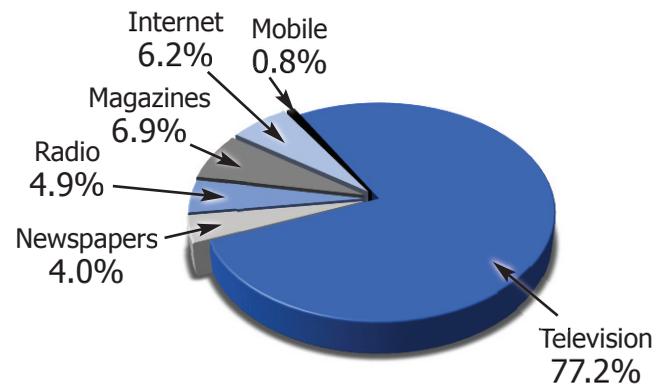
Most Persuasive



Most Exciting



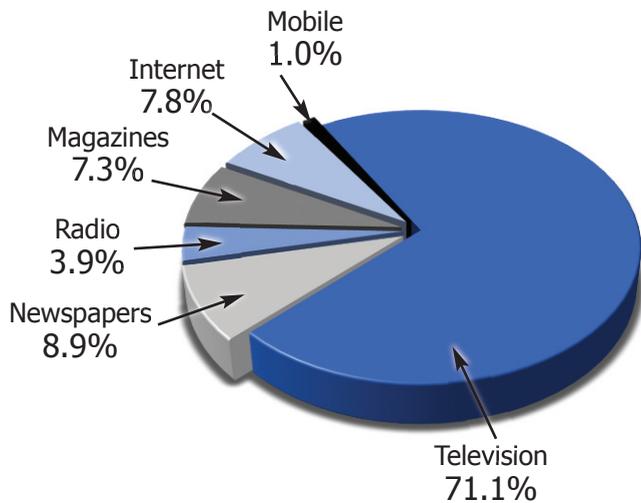
Most Engaging



Source: TVB Media Comparisons Study 2010. Knowledge Networks Inc. Custom Survey.

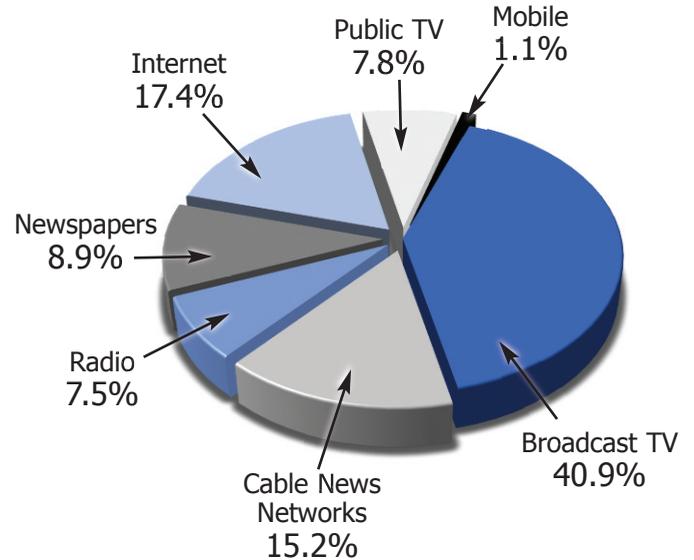
Television: The Source for Product Information

For advertisers, TV remains the primary link to the American consumer. Over 70% of consumers say they are most likely to learn about products or brands they'd like to buy from television commercials.



Broadcast Television is Cited as Primary News Source

Broadcast TV remains the primary news source for more viewers. Broadcast news was cited nearly three times as often as cable news by adults 18+.



Where Most Likely to Learn About Products or Brands

	Television	Newspapers	Radio	Magazines	Internet	Mobile
Adults 18+	71.1	8.9	3.9	7.3	7.8	1.0
Adults 18-49	70.5	6.2	3.7	7.4	10.9	1.2
Adults 25-54	71.2	7.2	4.3	7.5	8.7	1.1
Men 18+	68.2	10.2	5.0	6.2	9.5	1.0
Men 18-49	66.1	6.5	4.9	8.4	13.1	1.0
Men 25-54	68.4	8.0	5.4	7.1	10.2	0.9
Women 18+	73.7	7.7	2.9	8.5	6.3	1.0
Women 18-49	74.9	5.8	2.7	6.5	8.7	1.5
Women 25-54	73.7	6.4	3.2	7.9	7.4	1.3

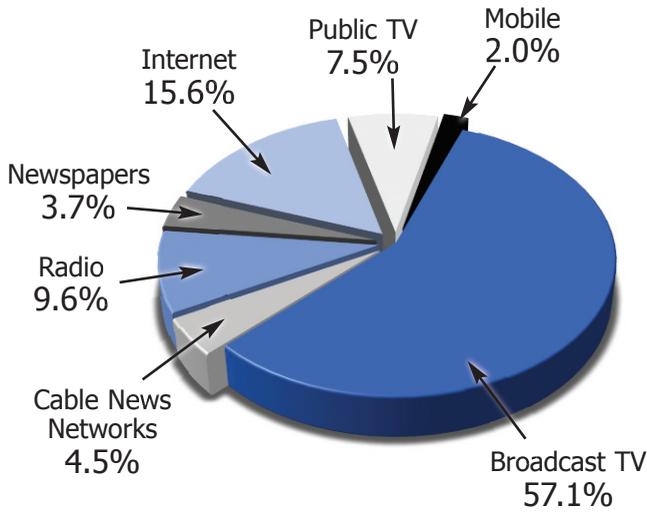
Medium Cited as Primary News Source

	Broadcast TV	Cable News Networks	Radio	Newspapers	Internet	Public TV	Mobile
Adults 18+	40.9	15.2	7.5	10.2	17.4	7.8	1.1
Adults 18-49	34.3	14.3	8.7	8.9	24.1	8.0	1.7
Adults 25-54	38.9	12.6	9.6	9.5	20.6	8.0	0.8
Men 18+	33.5	16.5	7.3	11.2	22.3	7.3	1.9
Men 18-49	29.9	13.4	7.9	9.3	29.9	6.7	2.9
Men 25-54	33.7	13.7	9.1	9.1	25.1	7.6	1.7
Women 18+	47.8	14.0	7.6	9.3	12.9	8.2	0.3
Women 18-49	38.9	15.2	9.4	8.4	18.3	9.3	0.6
Women 25-54	43.7	11.6	10.0	9.9	16.7	8.2	0.0

Source: TVB Media Comparisons Study 2010. Knowledge Networks Inc. Custom Survey. Pies illustrate A18+.

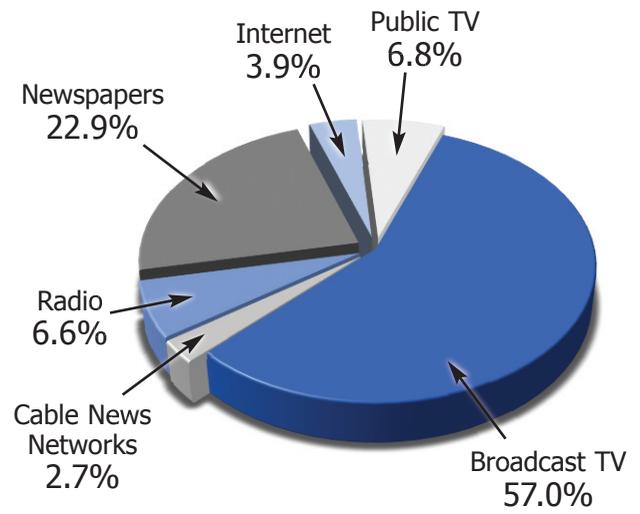
Broadcast News is the First Choice for Local Weather, Traffic and Sports

When it comes to getting the daily basics, viewers overwhelmingly turn to Broadcast TV.



Broadcast Television is the Medium Most Involved in the Community

Broadcast TV has built a solid reputation of commitment to issues of importance to local communities.



First Source for News on Local Weather, Traffic and Sports

	Broadcast TV	Cable News Networks	Radio	Newspapers	Internet	Public TV	Mobile
Adults 18+	57.1	4.5	9.6	3.7	15.6	7.5	2.0
Adults 18-49	48.3	4.8	9.2	3.5	22.5	8.6	3.2
Adults 25-54	52.9	3.9	10.5	3.4	19.5	7.9	2.1
Men 18+	54.8	3.7	11.9	3.9	16.6	6.1	3.0
Men 18-49	47.4	2.0	12.2	3.2	23.6	6.9	4.7
Men 25-54	51.0	2.4	14.3	3.3	19.7	6.3	3.0
Women 18+	59.4	5.2	7.4	3.6	14.6	8.6	1.2
Women 18-49	49.1	7.4	6.2	3.9	21.4	10.2	1.7
Women 25-54	54.6	5.3	7.1	3.3	19.2	9.3	1.2

Media Outlet Most Involved in Local Community

	Broadcast TV	Cable News Networks	Radio	Newspapers	Internet	Public TV
Adults 18+	57.0	2.7	6.6	22.9	3.9	6.8
Adults 18-49	55.7	2.8	6.9	20.5	5.9	8.2
Adults 25-54	58.1	2.3	7.1	20.4	4.4	7.8
Men 18+	54.3	3.3	7.4	25.4	3.4	6.2
Men 18-49	55.9	3.1	6.8	22.5	5.1	6.5
Men 25-54	57.7	2.5	7.9	22.1	3.4	6.5
Women 18+	59.7	2.1	5.8	20.6	4.3	7.5
Women 18-49	55.4	2.4	7.0	18.5	6.8	9.9
Women 25-54	58.4	2.1	6.2	18.8	5.4	9.0

Source: TVB Media Comparisons Study 2010. Knowledge Networks Inc. Custom Survey. Pies illustrate A18+.

Political Ads on Broadcast Television

All politics is local, and the bulk of political dollars are spent on local broadcast stations. In 2008, the last presidential year, that's where 82% of candidate dollars were spent.

2005-2009

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

Source: TVB analysis of Kantar Media/CMAG data.

Political Billing in 2008: Top 20 States

Rank	State	2008 Dollars
1	CA	\$261,086,695
2	PA	\$109,694,539
3	OH	\$104,915,908
4	FL	\$98,664,613
5	NC	\$72,936,571
6	CO	\$63,468,820
7	TX	\$56,707,715
8	MI	\$55,377,865
9	MO	\$52,704,050
10	NY	\$48,747,032
11	MN	\$44,685,151
12	DC	\$44,296,367
13	IN	\$42,855,457
14	IL	\$33,652,382
15	WI	\$33,463,077
16	GA	\$33,250,591
17	WA	\$29,295,980
18	KY	\$27,526,774
19	NV	\$27,524,302
20	OR	\$27,094,872

Source: TVB analysis of Kantar Media/CMAG data. New Hampshire and Iowa 2007 presidential spending not included.

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	86	111	119	123	96
Daytime Talk/Variety	77	97	107	114	114
Documentary/Information – Prime	97	108	108	107	106
Early Evening/Network News – M-F	98	114	110	101	99
Early Morning News	107	98	103	90	84
Early Morning Talk/News/Information	94	110	106	119	90
Entertainment Specials	110	120	119	106	86
Feature Films – Prime	65	91	100	67	84
General Drama – Prime	92	108	117	104	87
Late Night Network News/Info – M-F	105	102	98	98	89
Late Night Talk/Variety	74	103	110	128	131
Reality-based	94	107	115	91	82
Situation Comedies – Prime	77	97	114	116	120
Sunday News/Interview	123	116	100	113	92

Example: Viewers who consider themselves "Somewhat Conservative" are 20% more likely than all Adults 18+ to view Entertainment Specials.

Political Outlook – Usually Think Of Yourself As: Very Conservative...Very Liberal
Source: 2009 Doublebase Mediamark Research Inc.

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.

