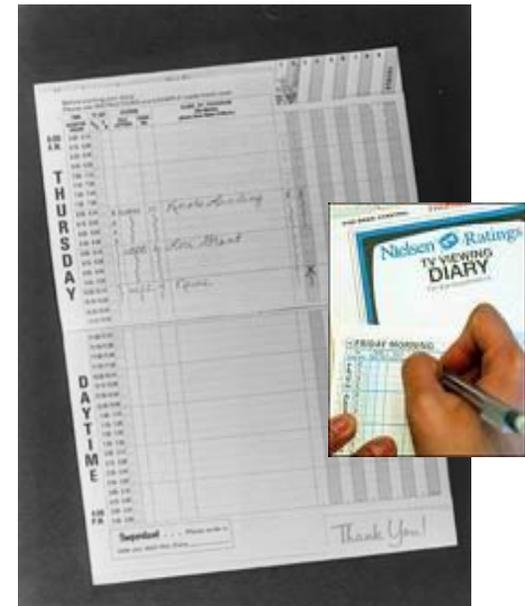

Local Cable in a Diary-Only Market



TV Audience Measurement in *Markets Without Meters*

- What's The Problem with Diaries?
- Barometer of Real Performance
- Another View for the Future
- Industry Approved Local Cable Posting Guidelines



Caution When Using Local Ratings In Diary-Only Markets

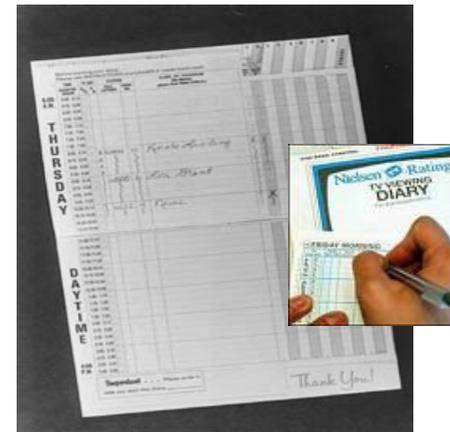


Diaries Try to Collect Who is Watching Television in Your Market

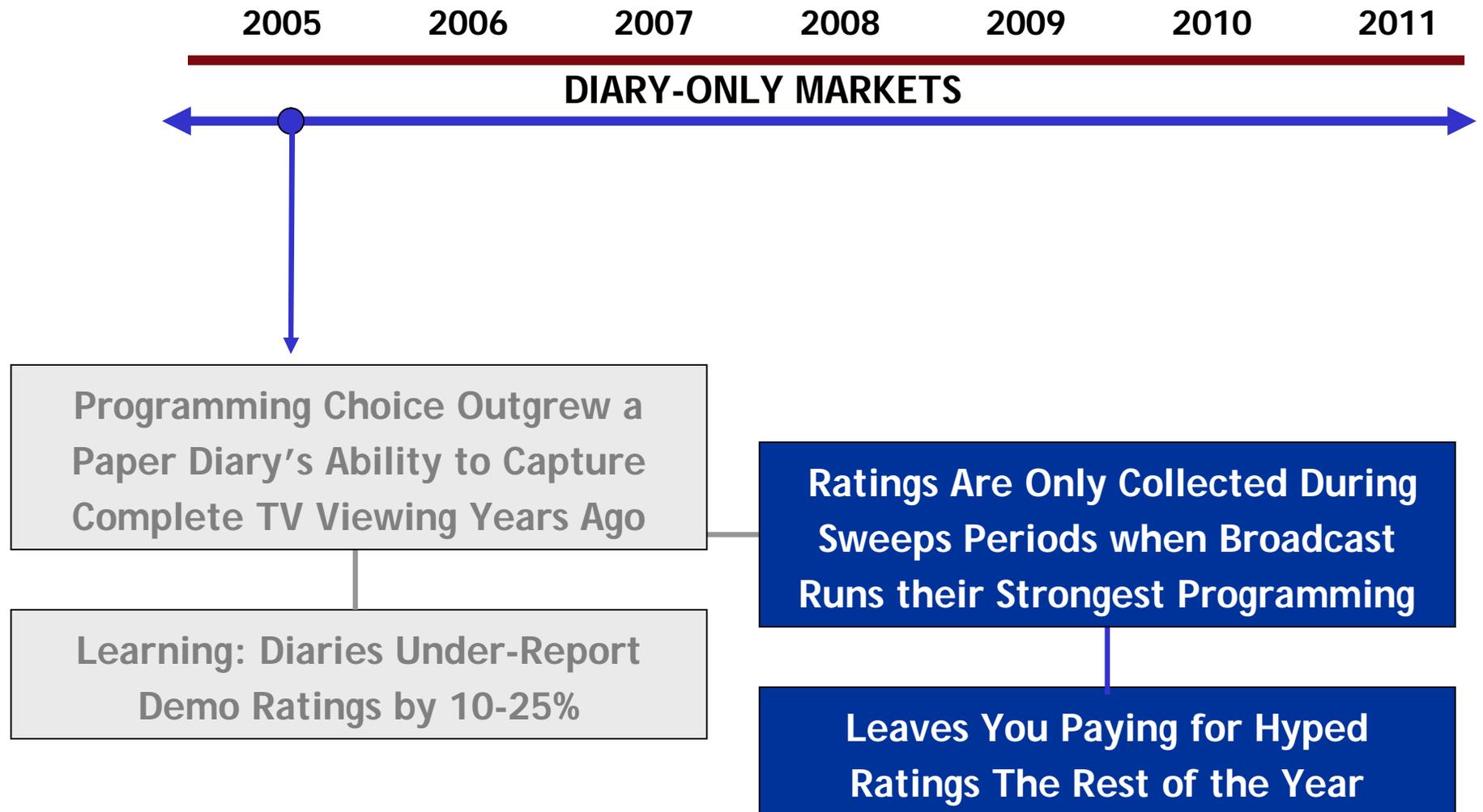


Programming Choice Outgrew a Paper Diary's Ability to Capture Complete TV Viewing Years Ago

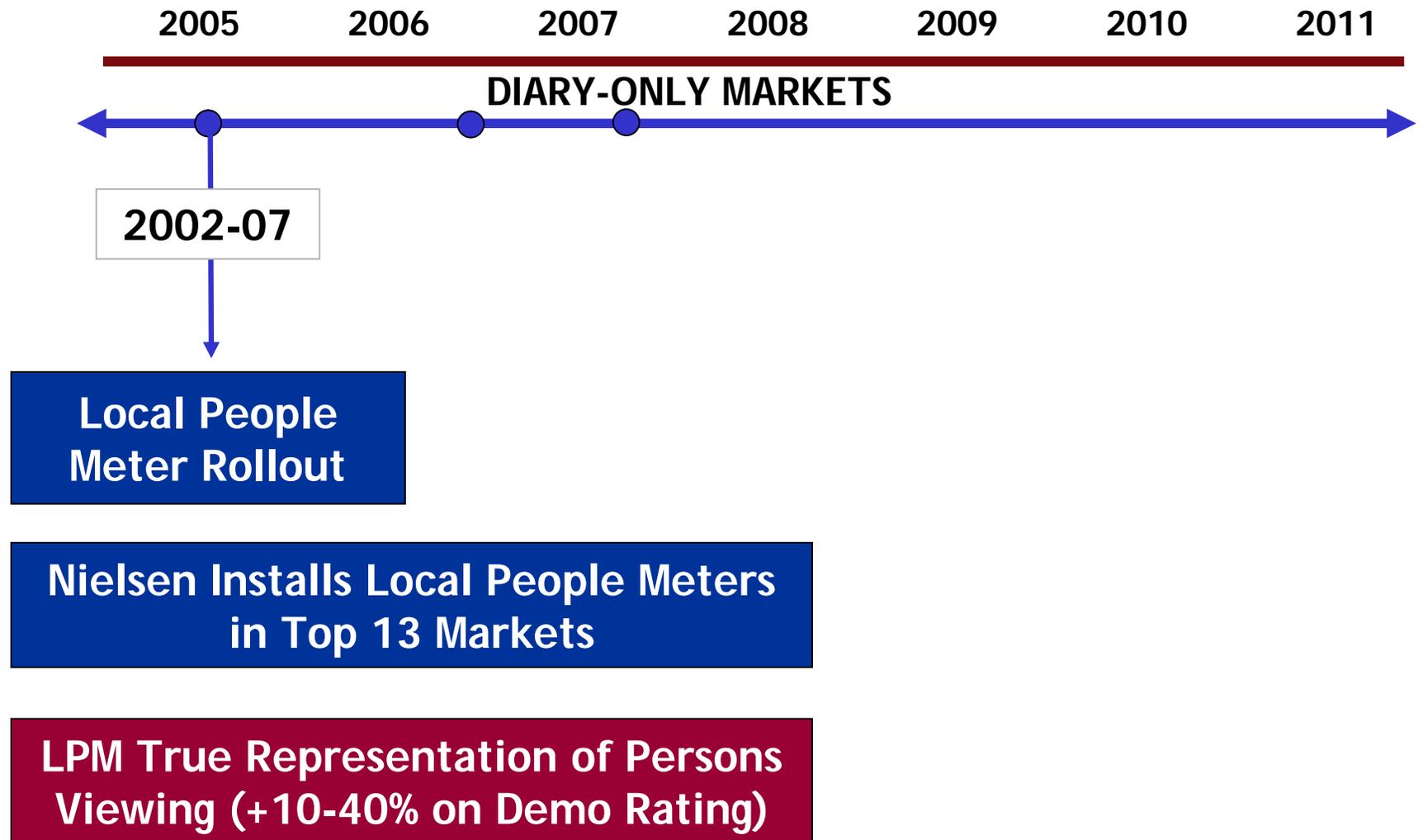
Learning: Diaries Under-Report Demo Ratings by 10-25%



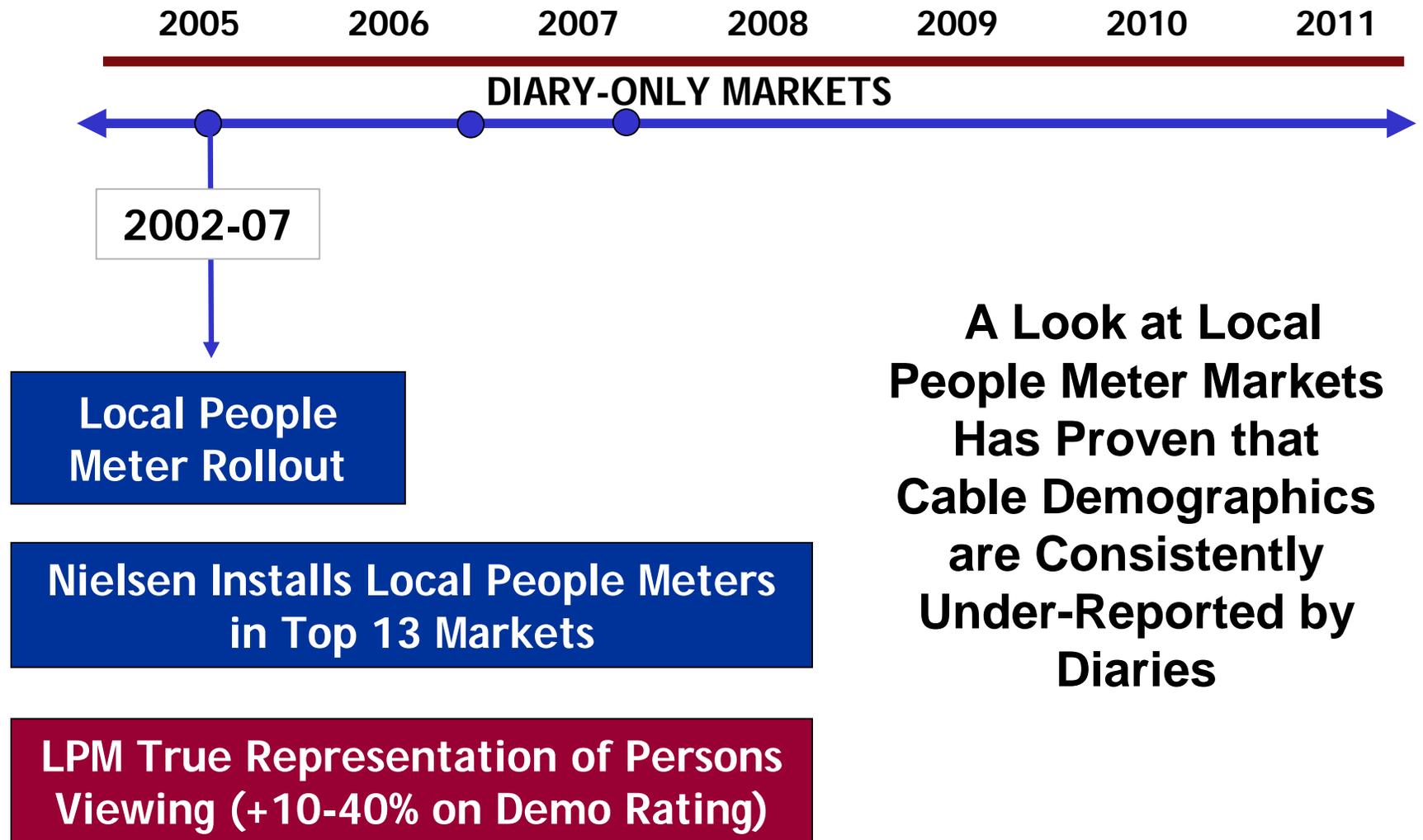
Sweeps Are Poor Indicators of Non-Sweep Months



Today's Gold Standard in Television Measurement



Today's Gold Standard in Television Measurement



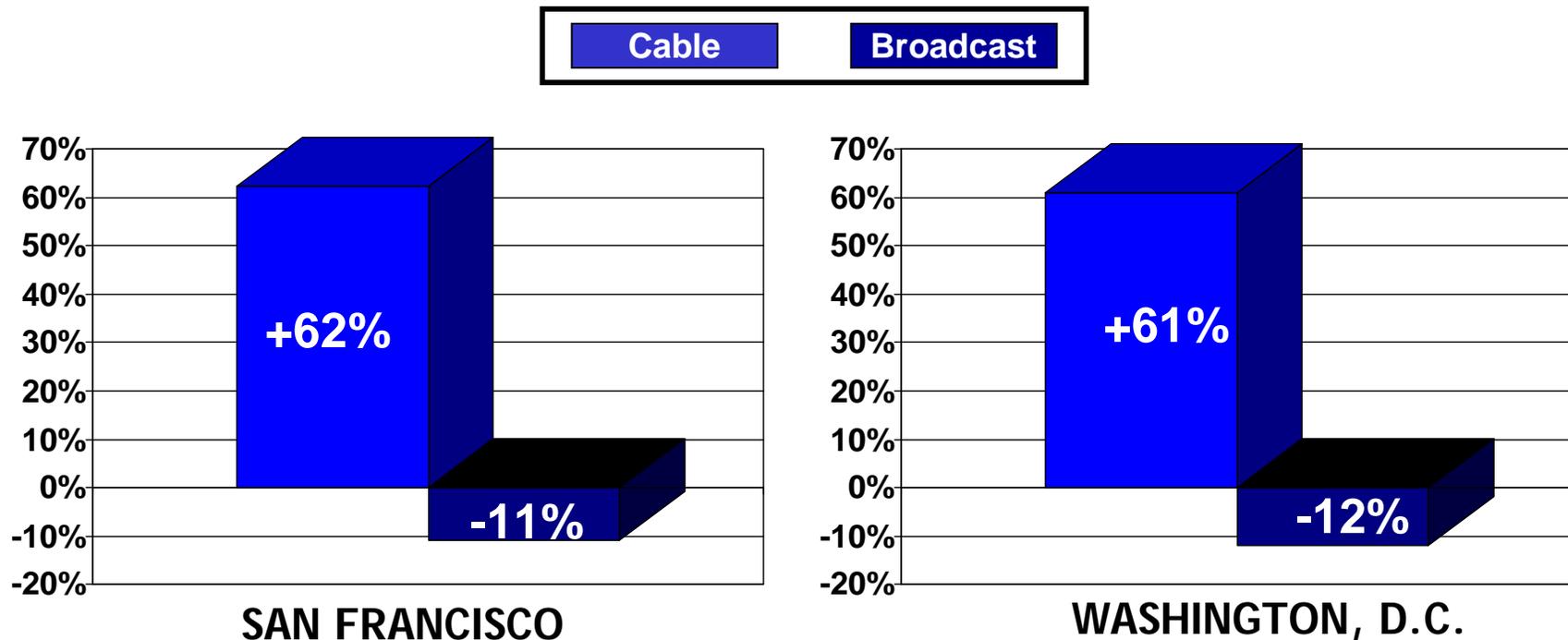
What Happens When a Market Gets Local People Meters?

The Game Changes...

Local People Meters Uncover Real Viewing Missing in Diaries

Every Time Nielsen Flips the Switch and Replaces the Diary System with LPM-
Broadcast Declines and Cable Increases.

% Difference in A25-54 Ratings Between Diary & LPM

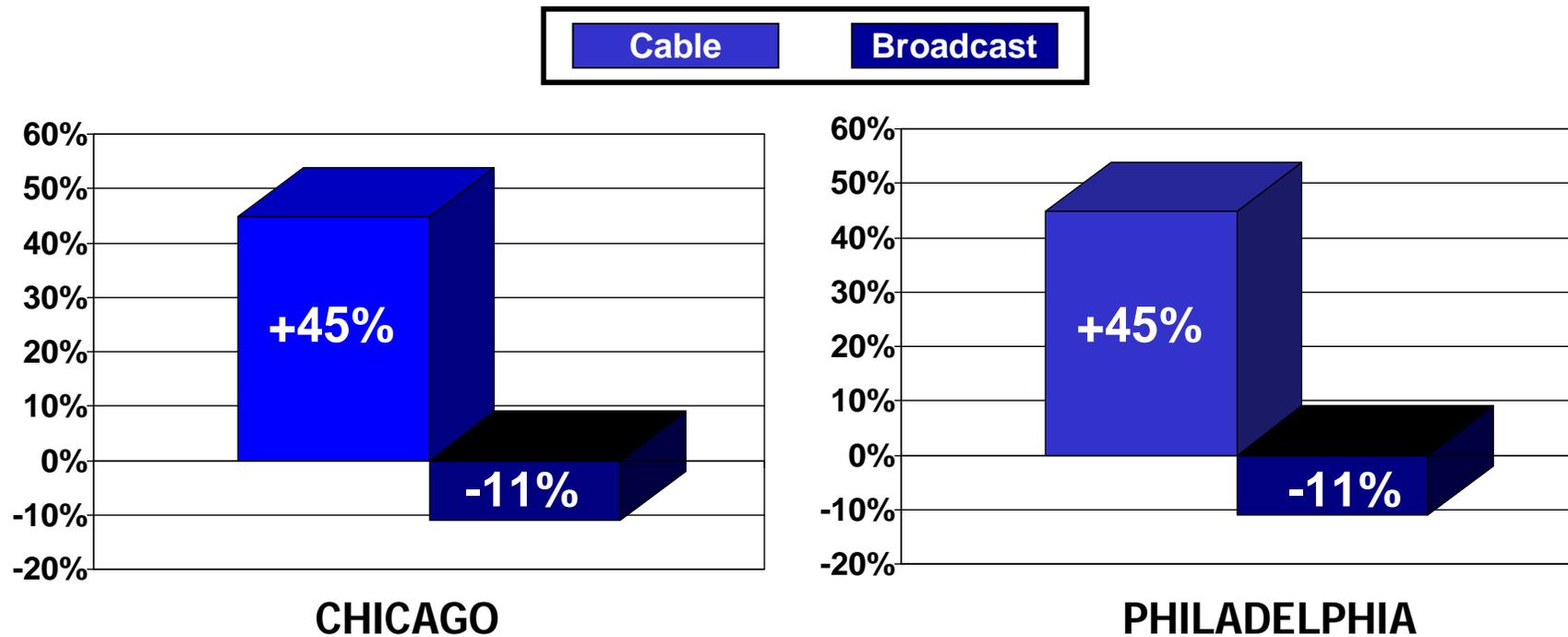


Source: Nielsen Media Research – San Francisco and Washington, D.C. DMA's. San Francisco: difference between Nov '03 TVS (Meter-Diary) data and Nov '04 LPM data. Washington, D.C.: difference between Jul '04 TVS (Meter-Diary) data and Jul '05 LPM data. Based on aggregate A25-54 ratings, M-Su 6a-6a.

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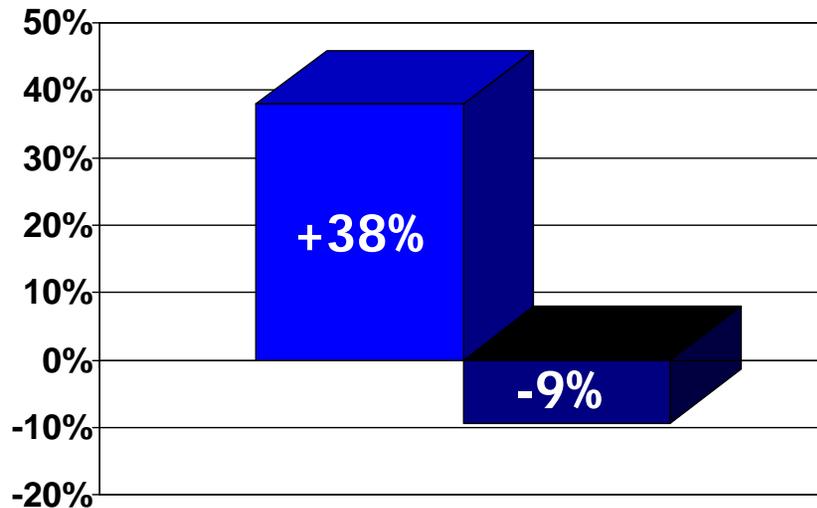
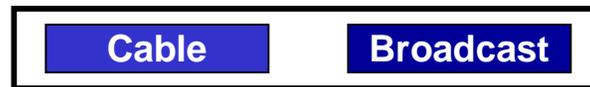


Source: Nielsen Media Research - Chicago and Philadelphia DMA's. Chicago: difference between Nov '03 TVS (Meter-Diary) data and Nov '04 LPM data. Philadelphia: difference between Jul '04 TVS (Meter-Diary) data and Jul '05 LPM data. Based on aggregate A25-54 ratings, M-Su 6a-6a.

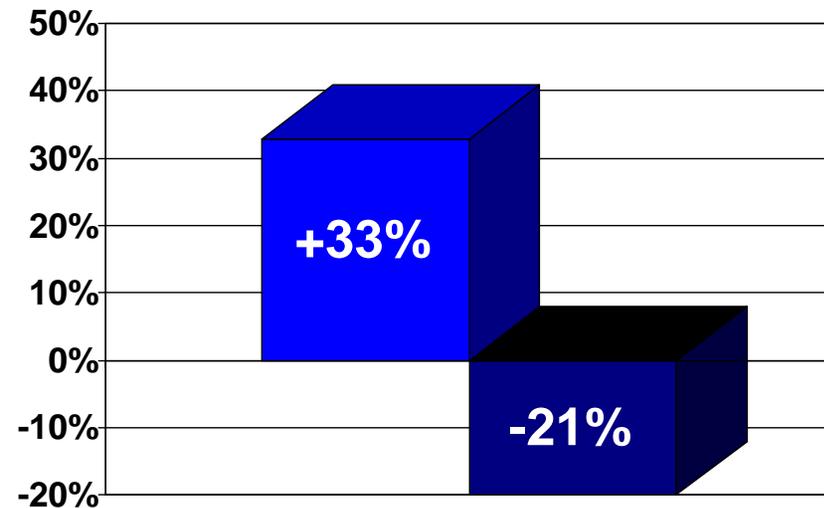
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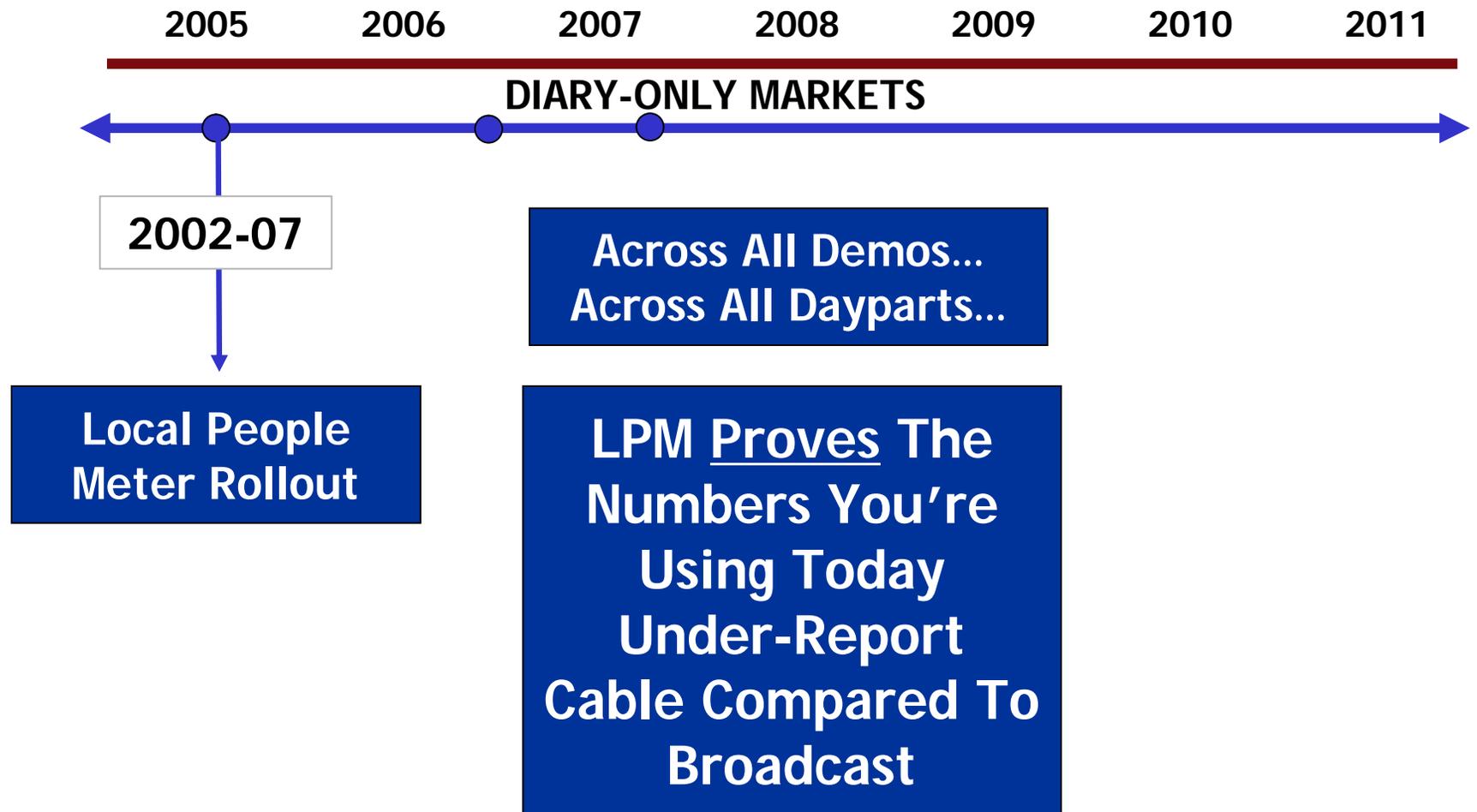


NEW YORK

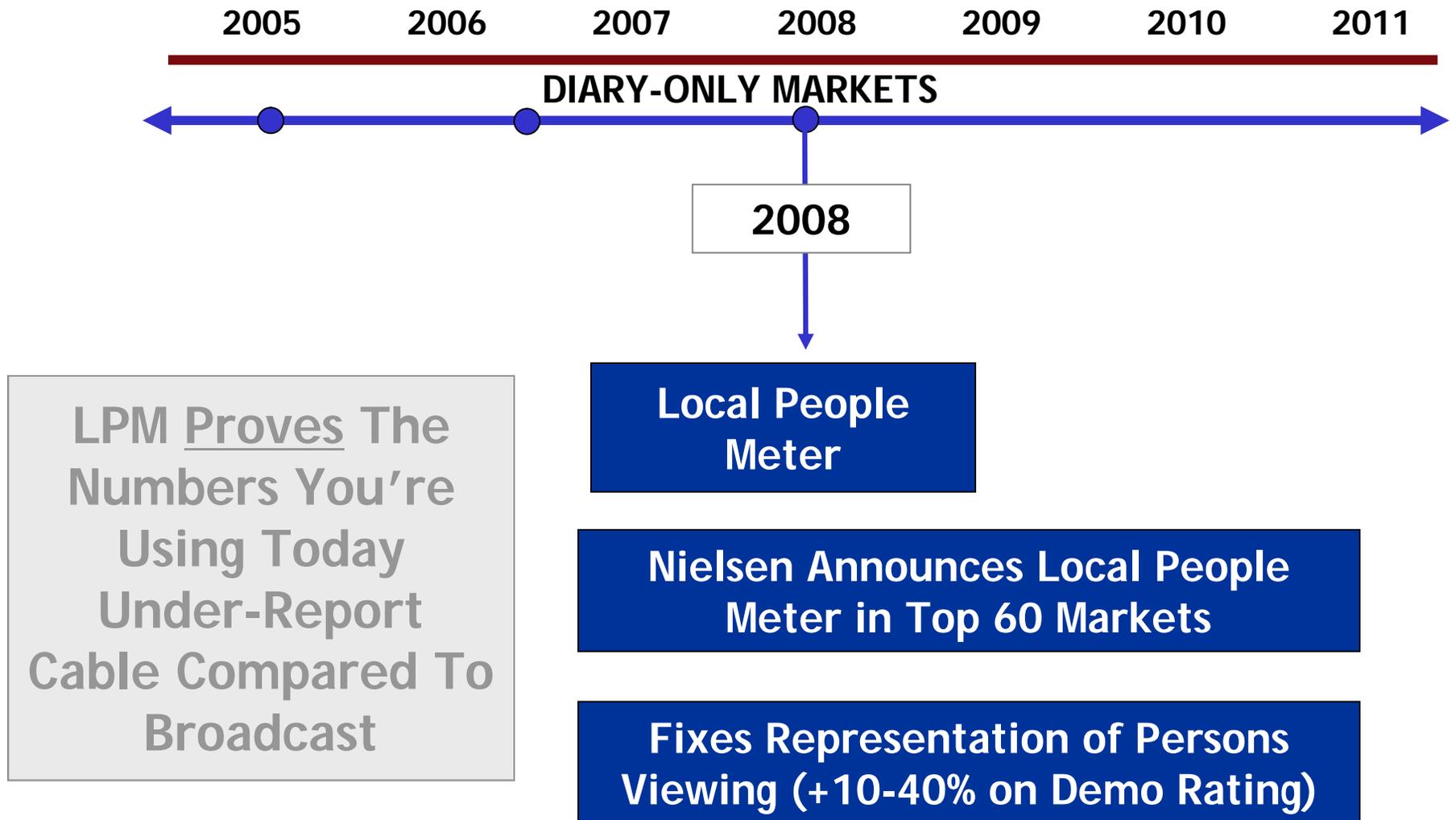


LOS ANGELES

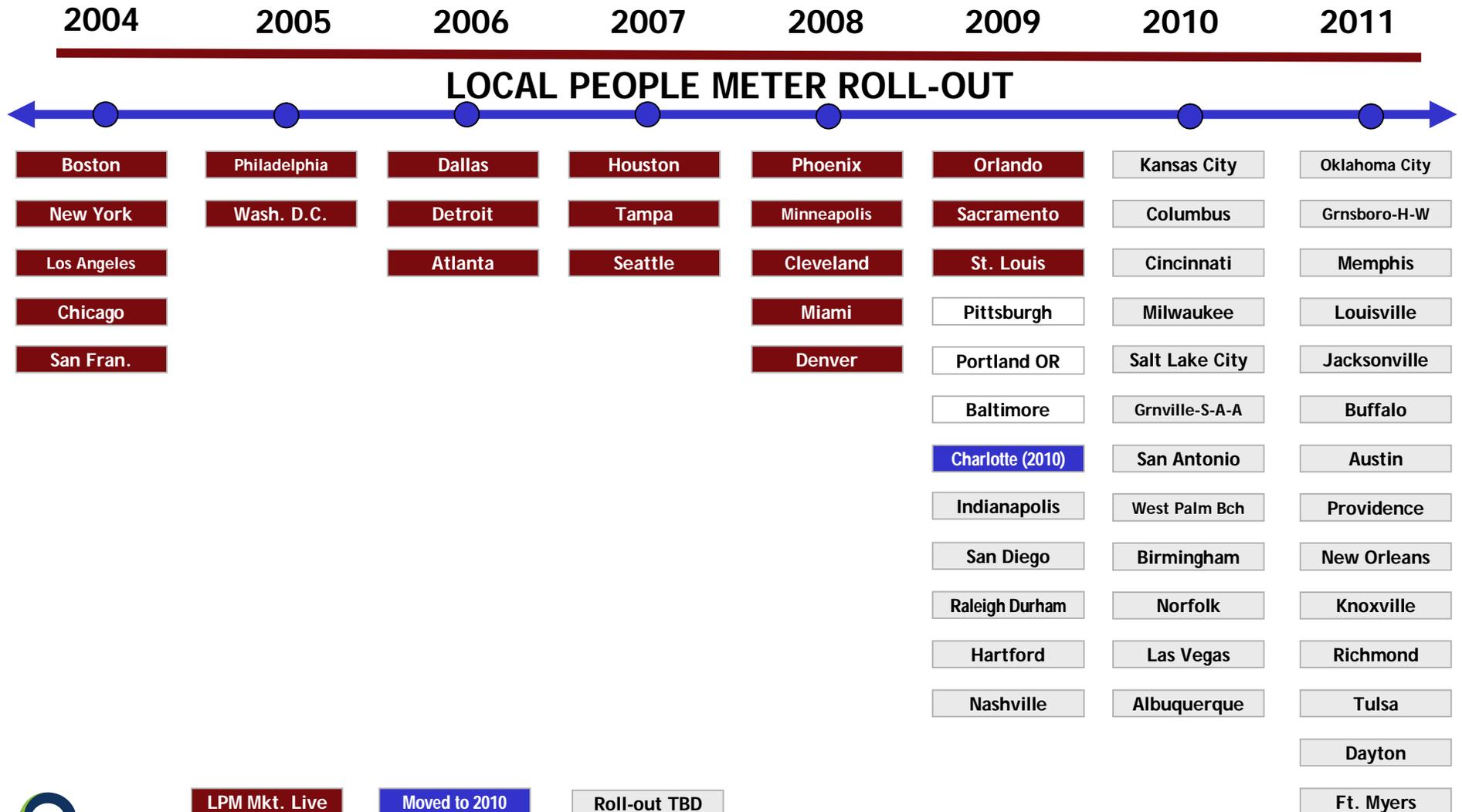
Today's Gold Standard in Television Measurement



LPM: Today's Gold Standard in Television Measurement



Local People Meters in Top 60 Markets by 2012?



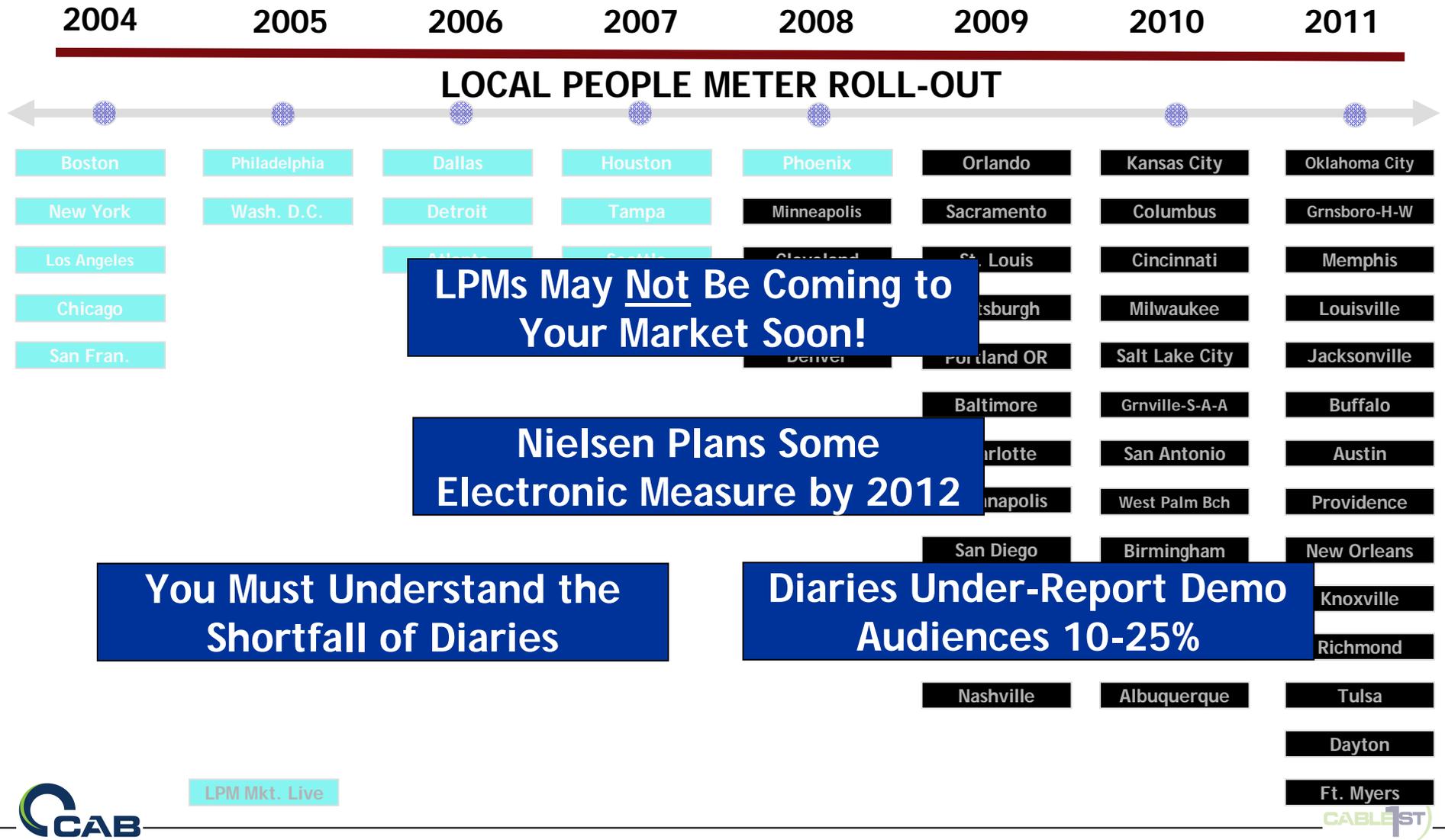
LPM Mkt. Live

Moved to 2010

Roll-out TBD



Local People Meters in Top 60 Markets by 2012?



What LPMs Mean for Future Measurement

1. More Reliable Sample

- The LPM sample is always larger than the previous set meter sample
- LPM sample is also more representative of the local population

2. No More Diaries

- LPMs collect both household *and* demographic data electronically, replacing a system that used paper diaries for demographic estimates
- Nielsen has estimated that diaries can underreport cable viewing by as much as 60%, depending on the network and daypart

3. Every Month's a Sweep Month

- Single-source collection means demographic audience estimates are no longer limited to the traditional sweep periods when broadcasters run their best programming
- Demo overnights also available

4. More People Watching More Channels

- On average LPM ratings for all persons watching TV in the DMA are higher than the meter/diary estimate
- Generally, non-prime dayparts and lower-rated networks enjoy the largest gains

The Future

- **Electronic Measurement in all Markets**
 - Nielsen's A2M2 measurement plan calls for electronic measurement in all markets by 2012

- **Set Top Box Data**
 - Set top box data is the only viable method to measure the fragmented audiences we have today.
 - Various issues need to be addressed before STB data can be used as a currency measure but is offering keen insight into viewing patterns today.

Local Cable Posting Framework

The Cabletelevision Advertising Bureau (CAB) and National Cable Communications (NCC) created the first industry-wide standard framework for posting local cable television. The new posting standards will provide advertising agencies and advertisers, across all markets and all MSOs guidelines for posting local cable. This new document was developed in partnership with the American Association of Advertising Agencies (AAAA) Local Television Committee and has received their approval for use.

The new guidelines offer both a recommended standard practice and an acceptable alternative for posting in each of the three local market types (Nielsen Local People Meter (LPM) Markets, Meter/Diary Markets and Diary Only Markets). The new framework also provides a recommended standard practice for posting by period (daypart rotation, fixed position/recurring and fixed position/specials & one-time-only (OTO) events). Additionally, a guideline for posting dependent upon schedule rating points is also available.

The CAB and NCC, working with all MSO members, drafted the new guidelines in an effort to insure greater accountability and common practices at the local level. This new framework offers local cable advertisers a standard approach across all markets eliminating the often raised questions about the proper way to post local cable.

More... 

Local Cable Posting Framework

Principles

- ✓ Posting requirements must be agreed upon prior to the start of the flight.
- ✓ Goal of stability, reliability, and sound business practice is paramount.
- ✓ Aim to reduce statistical error through aggregating ratings, expanding demographic targets, and lengthening posting periods.

Guidelines

1. Local Cable posting procedures apply to Interconnect buys only.
2. Guarantees are to be based on the aggregated performance of the entire flight/schedule - not on individual Network performance
3. The standard threshold of 90% should continue to be the minimum acceptable delivery. Directional broader threshold should be considered depending on TRP level, demo, scale of buy, market rank, etc. (Standard error ranges for ad-supported Cable viewing sources are regularly greater than +/-10%).

Local Cable Posting Framework

Guidelines (cont.)

4. Use wired-Cable-only impressions (i.e. non-ADS) from a C-DMA, FUSION, or NDM survey to project impressions delivered within the Interconnect; they may be Equivalized to the full DMA population.
5. Audience estimates should be based on electronic measurement which deliver the highest statistical reliability and should be the standard for all Local Cable posts.
6. No guarantees should be expected using any Diary-based data.

Local Cable Posting Framework

Survey Selection by Market Type

	Nielsen LPM Markets	Nielsen Meter/Diary Markets	Nielsen Diary-Only Markets
Recommended Standard Practice	TVS C-DMA* Live+7 Posted to Demo	NCC FUSION@ Live+7 Posted to Demo	NCC NDM** Live+7 Posted to Demo
Acceptable Alternative (Negotiated up front)	TVS C-DMA* Live Only Posted to Demo	TVS C-DMA* Live+7 Posted to HH only	Posting not recommended

Survey Selection by Market Type

	Daypart Rotation	Fixed Position/ Recurring	Fixed Position/ Specials & OTO Events
Recommended Standard Practice	Post based on minimum 4-week average data* for time period sold	Post based on min. 4-week avg. data for program and day of week sold; Full-season avg. for sports packages	Post based on Day/Date telecast average for event sold*

Survey Selection by Market Type

Weight of Schedule	Posting Guideline
Monthly GRPs in Demo	
50+	Post upon request
25-49	Negotiable
< 25	Posting not recommended



* C-DMA or non-ADS impressions; ** NDM – National Data Modeling – Using all national data

* All averages should be based on Nielsen average quarter hour methodology.



Thank You!