

Reaching Hispanic Consumers in Monterey Bay

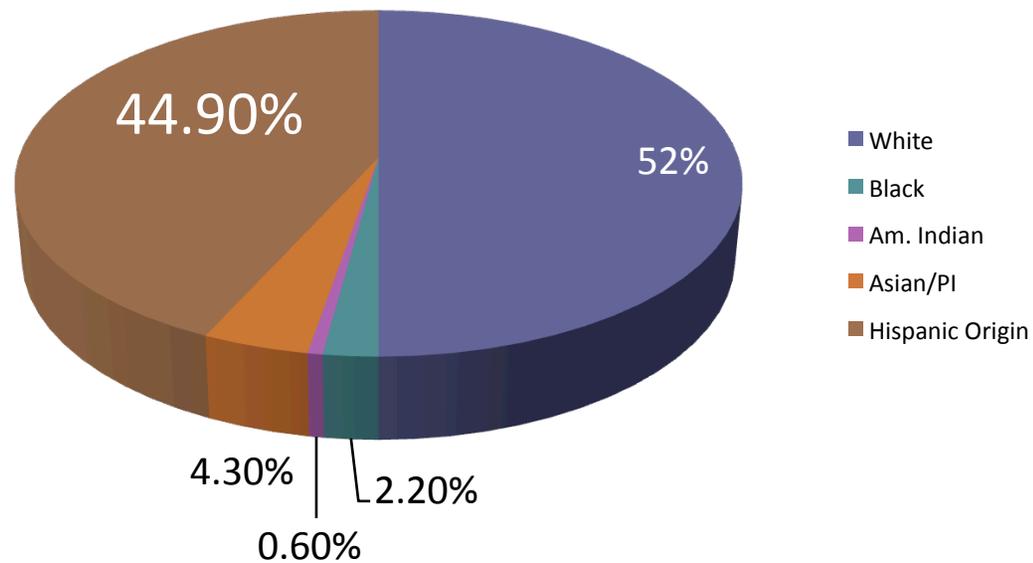
Monterey
Bay Area

comcast
SPOTLIGHT.

Hispanics Represent 44.9% of the Total Monterey Bay DMA Population



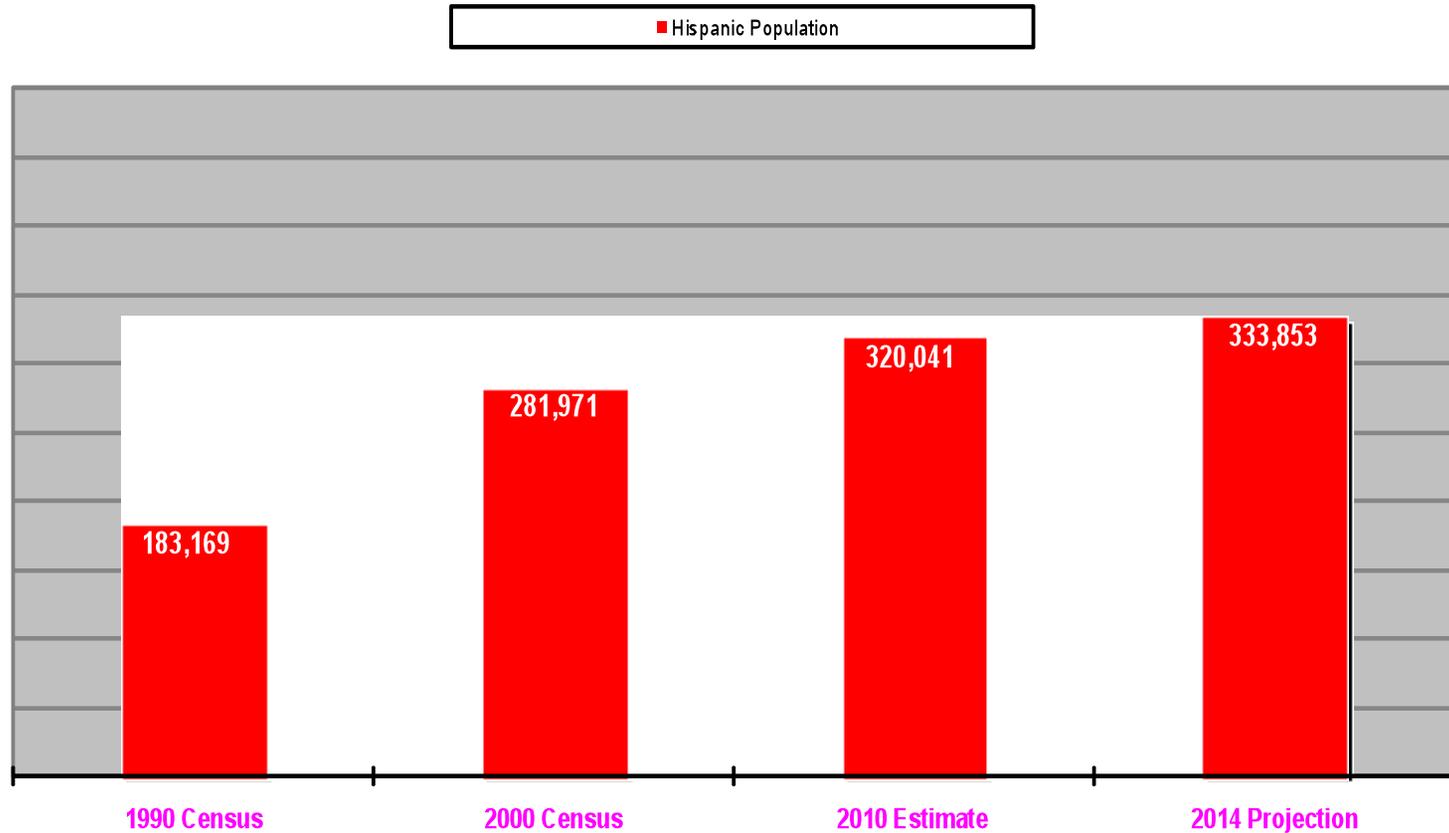
MB DMA Race/Ethnic Composition



Monterey Bay Area

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Since 1990, The MB DMA Hispanic Population Has Grown Tremendously



**Monterey
Bay Area**

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***Monterey Bay Area Hispanics Represent
Significant Buying Power in Today's Economy***

**Monterey
Bay Area**

Bay Area Hispanics Represent a Powerful Buying Block for Home Items and Home Improvements

Target: MB DMA Hispanic Households

| Item in the Home bought in the past year | Target Persons | Target % |
|---|-----------------------|-----------------|
| Hardware, paint, lawn, garden items | 147,560 | 92.0 |
| Large Appliance | 74,050 | 109.0 |
| Carpeting/Floor Covering | 21,798 | 77.0 |

| Home Improvement done in the past year | Target Persons | Target % |
|---|-----------------------|-----------------|
| Spent money on home improvement | 127,452 | 93.0 |



Monterey Bay Area Hispanics are More Likely to Plan to Buy a New or Used Vehicle in the Next Year

New Vehicles

| | <u>Hispanic Target Index*</u> |
|--|-----------------------------------|
| HH Plans to Buy/Lease a New Vehicle in the next 12 months | 130 |
| HH Plans to Pay Under \$25,000 for a New Vehicle in the next 12 months | 152 |

Used Vehicles

| | <u>Hispanic Target Index</u> |
|---|----------------------------------|
| HH Plans to Buy a Used Vehicle in the next 12 months | 105 |
| HH Plans to Pay Under \$25,000 for a Used Vehicle in the next 12 months | 120 |

* How to read Target Index: Hispanics are 10% more likely to plan to buy a New Vehicle in the next 12 months than the average Monterey Bay Area household.

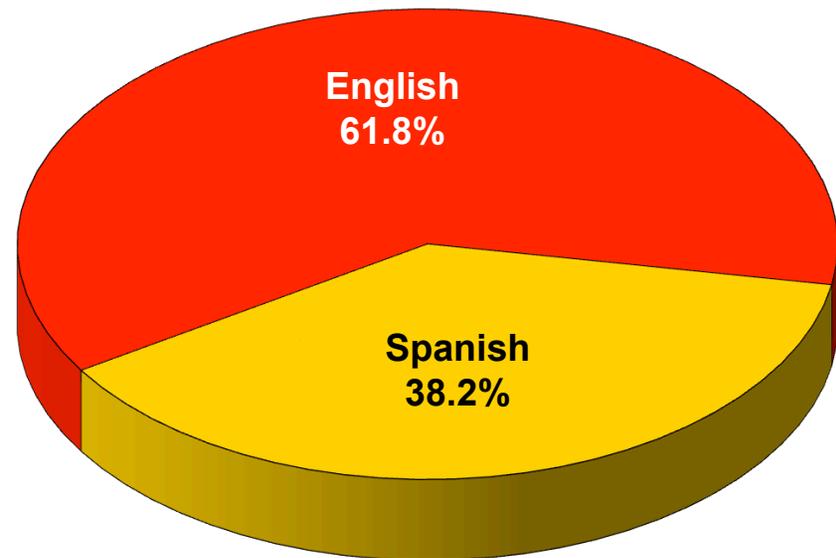
Monterey Bay Area Hispanics are English Speakers!

Reach Your Hispanic Consumer in the language they speak at home

**Only Comcast Has
Networks That Attract
All Hispanics!**

- *Use Comcast Spotlight's Spanish-language networks to reach Spanish-dominant Hispanic consumers.*
- *Use Comcast Spotlight's English-language networks to reach English-dominant Hispanic consumers.*

Dominant Language Spoken in
Monterey Bay Area Hispanic Households

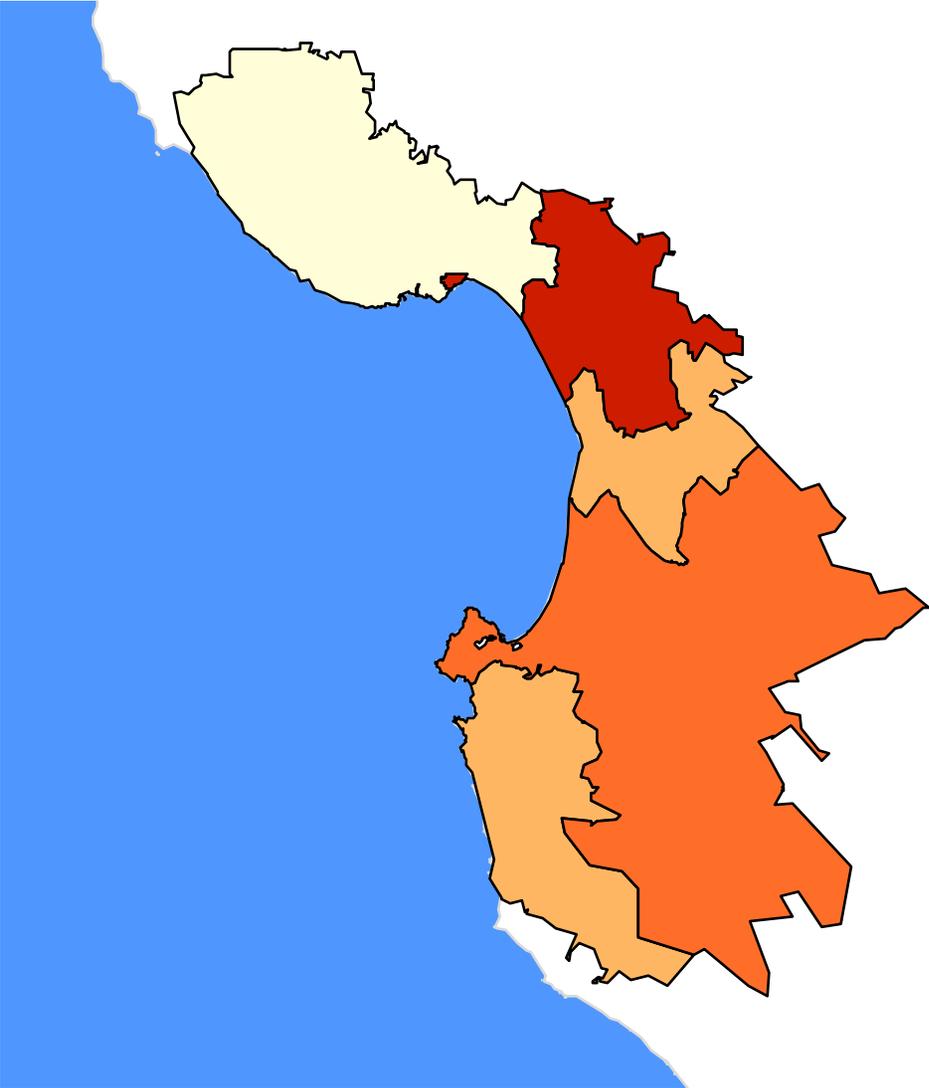




Why Comcast Spotlight?

Monterey
Bay Area

Population by Zone Shows Hispanic Density in Monterey-Salinas, Santa Cruz, Watsonville and Mt. Toro Zones



| Zone | % | Population | |
|-------------------------------|--------------|----------------|----------------|
| | | Hispanic | Total |
| Watsonville-Capitola Zone | 61.7% | 59,534 | 96,452 |
| Monterey-Salinas Zone | 50.6% | 138,857 | 274,474 |
| Mt. Toro Zone | 37.7% | 19,616 | 52,084 |
| Santa Cruz-Scotts Valley Zone | 13.8% | 23,060 | 167,441 |
| Total | 40.8% | 241,067 | 590,451 |

Legend: Hispanic Population Density

- 51.3 - 61.7%
- 40.3 - 51.3%
- 31.6 - 40.3%
- 24.8 - 31.6%
- 13.8 - 24.8%

Monterey Bay Area

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Bay Area Hispanics Watch Sports on Cable Television

| Sports On TV Past Year: | Hispanic Target Pop. | Target % |
|--------------------------------|---------------------------------|-----------------|
| San Francisco Giants | 41,028 | 64 |
| San Francisco 49ers | 43,224 | 71 |
| Oakland A's | 27,260 | 83 |
| Oakland Raiders | 34,106 | 101 |
| NBA | 23,264 | 78 |
| Olympics | 25,182 | 75 |
| Pro Boxing | 49,244 | 184 |
| San Jose Sharks | 11,680 | 39 |
| PGA Tour (Men's Golf) | 15,952 | 40 |

Comcast Spotlight ... One Stop Advertising!

Target All Hispanics on Comcast

- Comcast is the only place to buy media that reaches the entire Hispanic market
- Some Hispanics are Spanish-dominant speakers
 - Comcast offers advertising on Galavisión in all areas, and Fox Sports en Español in areas with high Hispanic Densities. Target Spanish-dominant consumers with these networks
- Many Hispanics are bilingual as well as English-dominant speakers
 - English-dominant Hispanics have always been heavy users of cable television

Attract Spanish-dominant Hispanics on Comcast Spotlight Spanish-Language Nets



Galavisión - is the leading Spanish-language cable network in the United States. Galavisión's new lineup will expand its lead as the number one general interest Spanish-language cable network among Hispanics of all ages. The new schedule includes innovative talk and variety shows, popular sporting events and much more – scheduled to counter-program the three existing Spanish-language broadcast networks. Galavisión will also broadcast FIFA tournaments such as the FIFA Women's World cup in September.

Available in all zones.

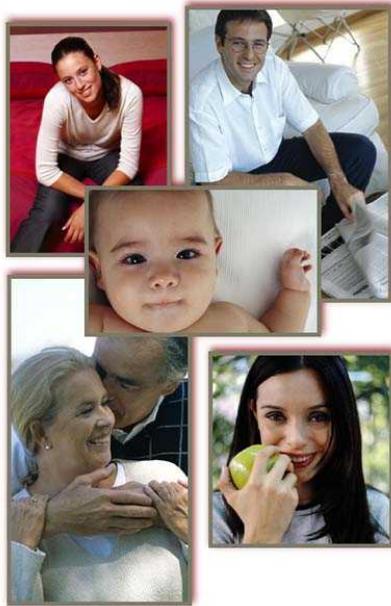


Fox Sports en Español – Fox Sports en Español is the only 24-hour Spanish-language sports network in the United States. With its outstanding, action-packed line-up, Fox Sports en Español provides the most games, highlights, and breaking news from the world's most popular sport—soccer. Plus, only Fox Sports en Español offers comprehensive coverage of other international sports of interest to the U.S. Hispanic sports viewer, including Championship Boxing and Major League Baseball.

Available in Monterey-Salinas and Watsonville-Capitola zones only.

Monterey
Bay Area

Target Hispanics on These Recommended Cable TV Networks



| Network | % | Index |
|-------------------|------|-------|
| Galavision | 7.5 | 258 |
| BET | 2.8 | 131 |
| MTV | 2.4 | 113 |
| Oxygen | 8.6 | 112 |
| TLC | 13.3 | 110 |
| Syfy | 19.9 | 106 |
| Tru | 11.8 | 105 |
| E! | 10.7 | 101 |
| SPK | 4.2 | 101 |
| HGTV | 10.7 | 100 |

Hispanics and Targeted
Cable Television...
A Perfect Match!

**Monterey
Bay Area**

***NOTE:** Unreliable – number of responses too small for reliability. Shown only for consistency purpose.

Source: Scarborough Research Survey Monterey-Salinas DMA, Total Adults 18+ Spring 2009

Summary

- Hispanics represent **44.9%** of the total Monterey Bay DMA population
- Hispanics have a significant influence on our market's economy
 - Hispanics have **made many purchases** in the home and home improvement category
 - Hispanics plan to buy a new or used vehicle in the next year
- Hispanics are English speakers
 - **Only Comcast Spotlight** has networks that **attract** Hispanics who are Spanish-dominant speakers and English-dominant Hispanics
- Hispanics live across all Comcast Spotlight advertising zones, with higher concentrations in the Watsonville and Monterey-Salinas zones
- Comcast Spotlight offers one-stop advertising
 - **Comcast Spotlight is the only place** to buy media that **reaches the entire Hispanic market**
- Comcast Spotlight sports deliver Hispanic consumers
- Attract English-dominant Hispanic consumers on your own Hispanic Virtual Networks



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