
Cable's Rating Dominance

10/11 Season To Date Primetime Review

Cable's Rating Dominance

Cable captures 60% of total TV viewing – increasing its spread over Broadcast.

Among key advertiser targets, Cable increases its share.

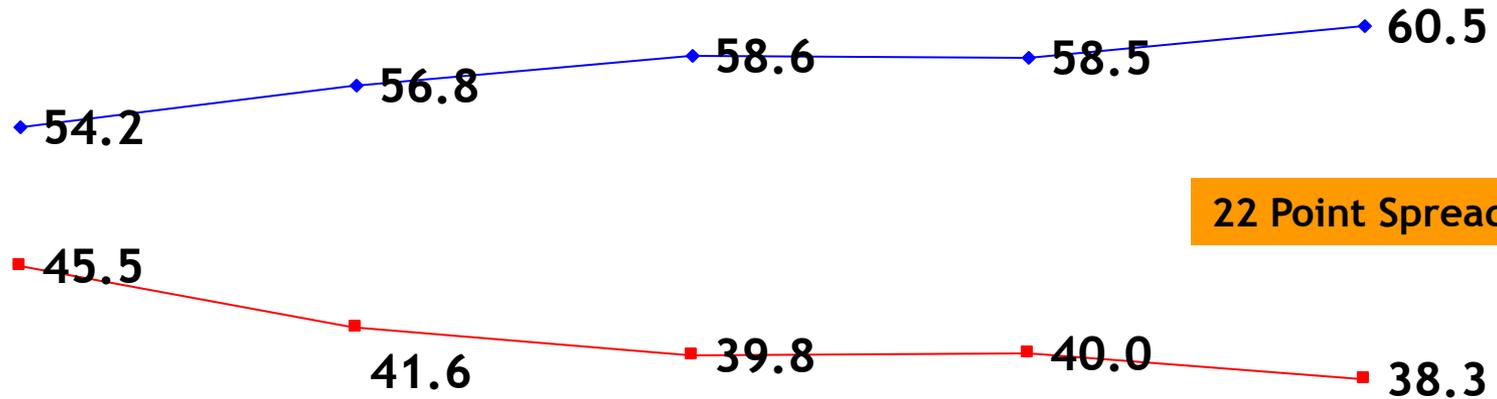
Broadcast loses ground with P18-34 – attributable to practically all networks.

With more than half of Broadcasts' schedule consisting of return programs this season – 75% are down v. year ago.

Overall, 96% of Broadcasts' programming is earning below a 5.0 among A18-49.

Cable Captures 60% Of Total TV Time

STD HH Share Trend
Primetime



22 Point Spread Exits

◆ Ad-Supp Cable ■ Broadcast 6 Affils



Source: Nielsen Galaxy timeperiod Live+7 data. 9/20/10-4/24/11 v. same periods.

Among Key Advertiser Targets, Cable Continues To Grasp A Larger Share Of TV Viewing Pie

STD Shares In Primetime 10/11 v. 09/10

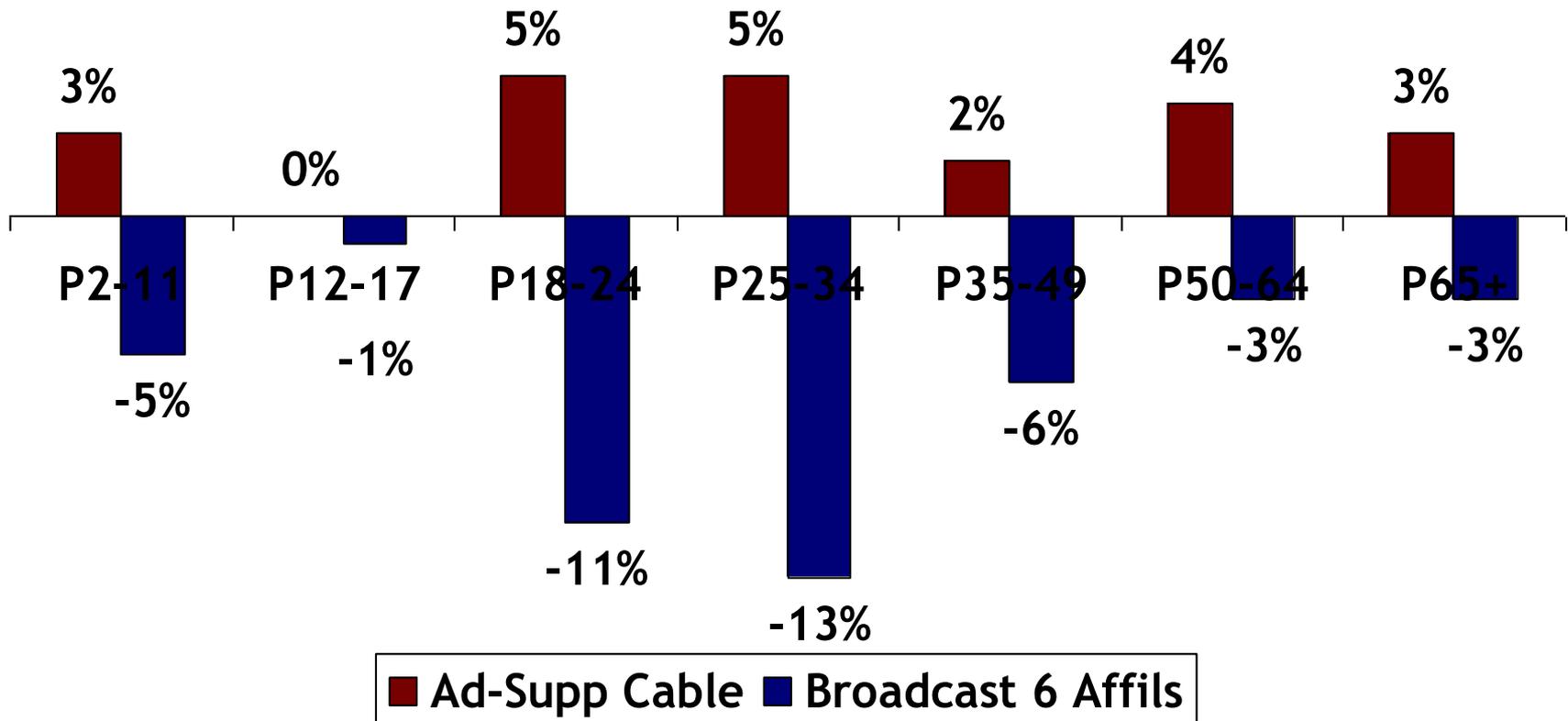
	Ad-Supp Cable's % Diff v. YAG	Broadcasts' 6 Affils % Diff v. YAG
P18-49	+5%	-7%
P18-34	+6%	-11%
P25-54	+4%	-5%



Source: Nielsen Galaxy timeperiod Live+7 data. 9/20/10-4/24/11 v. 9/21/09-4/25/10.

Cable Experiences Rating Gains Across The Board, While Broadcast Loses Ground With P18-34

Primetime Ratings % Change
STD 10/11 v. 09/10



Broadcasts' P18-34 Loss Isn't Attributed To Just One Network

Broadcasts' Primetime A18-34 Rating Percent Change By Network 10/11 v. 09/10



With Cable's Growth, Ad-Supported Cable's Advantage Increases - Especially With Young Men

Primetime STD AA%

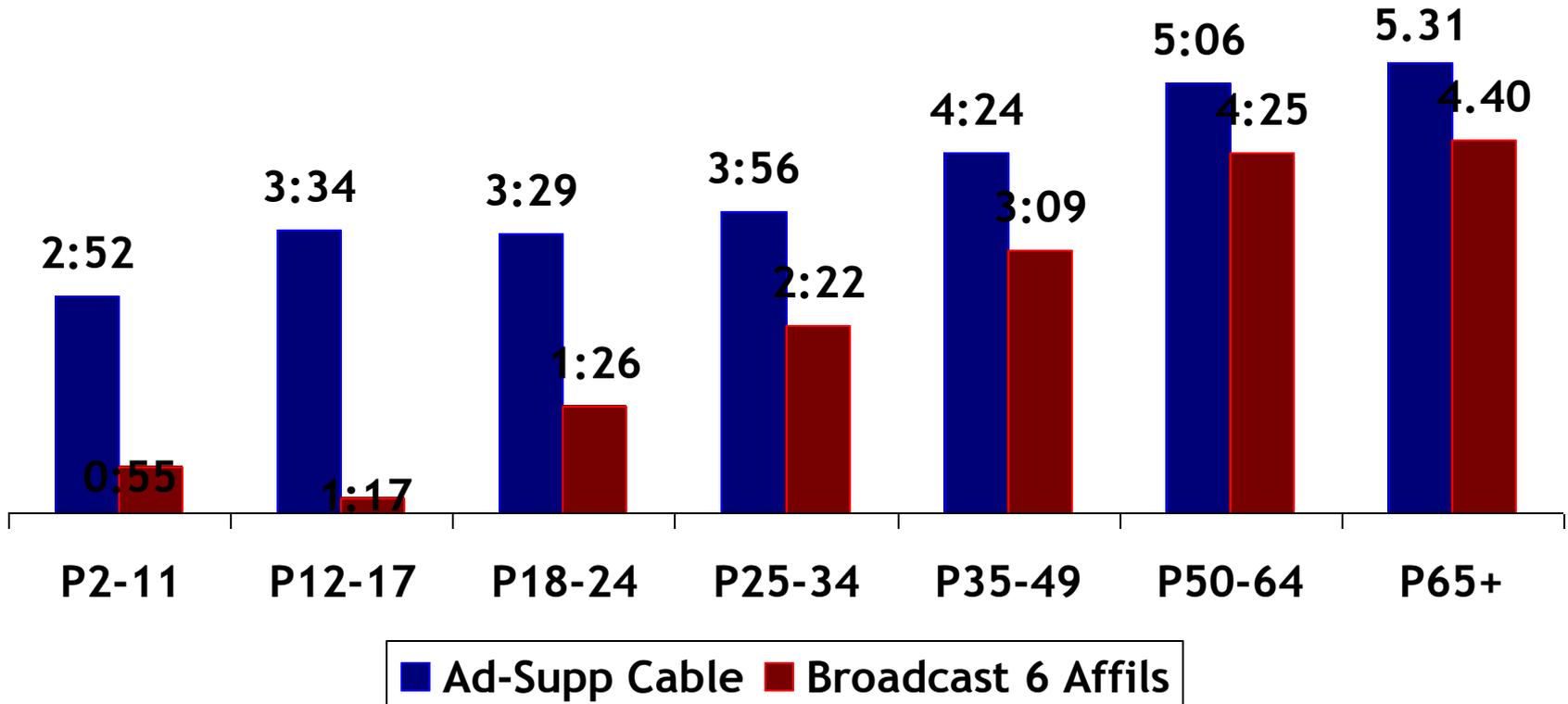
WOMEN	F2-11	F12-17	F18-24	F25-34	F35-49	F50-64
	AA%	AA%	AA%	AA%	AA%	AA%
BDCST 6 AFFILS	4.2	6.1	7.4	12.3	15.8	22.7
AD SUPP CABLE	11.9	15.3	15.9	18.0	19.1	22.7
CABLE'S ADVANTAGE	7.6	9.2	8.5	5.8	3.3	0.0
MEN	M2-11	M12-17	M18-24	M25-34	M35-49	M50-64
	AA%	AA%	AA%	AA%	AA%	AA%
BDCST 6 AFFILS	4.2	5.5	5.6	9.3	12.8	17.2
AD SUPP CABLE	14.1	17.1	15.8	17.8	21.0	23.7
CABLE'S ADVANTAGE	9.9	11.6	10.1	8.5	8.2	6.5



Source: Nielsen Galaxy timeperiod Live+7 data. 9/20/10-4/24/11 v. 9/21/09-4/25/10.

On Average, Younger Consumers Spend Significantly More Time With Cable Per Week

Time Spent In An Average Week (HRS:MIN)
Primetime



Programming Performance?

New v. Return Programming

96% of Broadcast Prime Programs Are Earning Below a 5.0 Rating Among A18-49

Big-4 Networks Primetime Program Ratings

A18-49 Rating	STD 10/11 Season	% of Total Programs
15+	0	0%
10-15	0	0%
5-10	5	4%
0-5	126	96%
Total	131	100%



Source: Nielsen Galaxy; All programming greater than two telecasts. 9/20/10-4/24/11.

Over Half (61%) Of Broadcasts' Big 4
Primetime Regular Programming
Schedule Consists of Return
Programming.



Source: CAB analysis of Nielsen Galaxy Live+7 timeperiod level AA%. 9/20/10-4/24/11 v 9/21/09-4/25/10.
Primetime=M-Sa/8-11p & Su/7-11p. All programming greater than 2 t/c.

Three Quarters Of Broadcasts' Return Programs Are Down Versus YAG

Number of Broadcast Return Programs Per Category: Primetime STD 10/11

A18-49 AA%	Broadcast 4 Nets	% of Total
Up v. YAG	20	25%
Flat v. YAG	1	1%
Down v. YAG	59	74%
TOTAL	80	100%



Source: CAB analysis of Nielsen Galaxy Live+7 timeperiod level AA%. 9/20/10-4/24/11 v 9/21/09-4/25/10. Primetime=M-Sa/8-11p & Su/7-11p. All programming greater than 2 t/c.

'Premium Programs' Continue To Experience A Significant Decline

Top 20 Broadcast Return Program Loses

RANK	NET	PROGRAMS	10/11 RTG
			% Change v. YAG
1	CBS	UNDERCOVER BOSS	-45%
2	ABC	V	-40%
3	NBC	LAW & ORDER:SVU-WED 9PM	-40%
4	CBS	CSI: NY	-33%
5	ABC	J. OLIVER'S FOOD REVOLUTN	-28%
6	NBC	MINUTE TO WIN IT	-27%
7	ABC	BROTHERS & SISTERS	-26%
8	NBC	BIGGEST LOSER 10	-25%
9	FOX	LIE TO ME	-24%
10	NBC	30 ROCK	-24%
11	FOX	HUMAN TARGET	-24%
12	CBS	CSI: MIAMI	-21%
13	ABC	DESPERATE HOUSEWIVES	-21%
14	NBC	COMMUNITY	-20%
15	NBC	PARENTHOOD	-20%
16	FOX	AMERICAN DAD	-20%
17	FOX	HOUSE-FRI 8P	-20%
18	NBC	CHUCK	-20%
19	FOX	HOUSE	-19%
20	CBS	MENTALIST, THE	-19%



Source: CAB analysis of Nielsen Galaxy Live+7 timeperiod level AA%. 9/20/10-4/24/11 v 9/21/09-4/25/10. Primetime=M-Sa/8-11p & Su/7-11p. All programming greater than 2 t/c. Ranked on greatest loss among return pgm.

With Viewers Deserting Return Programs, Are New Programs Holding Their Interest?

Majority (98%) Of New Programs Are Earning Below A 4.0 Among A18-49

Broadcast 4 Regular Programs Classifications

P18-49 AA% Classifications	# of <u>NEW</u> Pgms	% of Total	# of <u>RETURN</u> Pgms	% of Total
10+	0	0%	0	0%
5-9	1	2%	4	5%
0-4	50	98%	76	95%
TOTAL	51	100%	80	100%



Source: CAB analysis of Nielsen Galaxy Live+7 timeperiod level AA%. 9/20/10-4/24/11 v 9/21/09-4/25/10. Primetime=M-Sa/8-11p & Su/7-11p. All programming greater than 2 t/c.

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