

Miami LPM Conversion Overview

May, 2009

Key Points for Miami LPMs

- **Nielsen is committed to improving the accuracy of the TV ratings in Miami. The advertising market and the economy as a whole will work more efficiently if advertisers have greater confidence that they are paying for ads that people really watch.**
- **With the introduction of Local People Meters, Miami's local television ratings are more accurate and more representative of the local population than ever before.**
 - The sample is bigger and it does a better job of representing the diverse communities in Miami than the set meter/diary samples ever could.
 - Because we do our recruiting in person, we get better response rates, which improves our sample quality.
- **LPMs are based on the same technology that has been measuring national TV ratings since 1987.**
 - Because the meters are electronic, they measure what people really watch and do not rely on diarists' memories of what they watched. This is increasingly important in a TV world where people change the channel frequently, have access to several hundred TV sources, and use DVRs.
 - Our electronic meters provide continuous audience measurement of people watching television. As a result, we provide TV viewing measurement 365 days a year. LPM ratings are available soon after the viewing occurs, which enables programmers and advertisers to make immediate decisions.
 - In contrast, paper diaries only provide ratings four times a year during sweeps months, and the ratings are not available until more than a month after the viewing occurs.
- **The LPM sample is more representative of the local population than the Set Meter sample it is replacing.**
 - The LPM sample is bigger and more closely represents the percentage of all major household demographic characteristics of all communities within the market.
- **The larger LPM sample, combined with the increased accuracy of the people meter itself, enables Nielsen to provide ratings for more viewing sources.**
 - Diary measurement tends to favor larger, better known programming because diary keepers tend to remember better known sources when they are filling out the diary.
 - As a result, smaller broadcasters and cable networks benefit from the LPM's ability to capture the full range of programming that people actually watch.
- **Miami's DVR penetration increased from 14.8% to 22.5% between Feb. 2008 and Feb. 2009.**

Sample Performance

- **Sample Size:** Nielsen's LPM sample sizes are larger than the set meter and diary samples. In Miami, the LPM sample provides the market with a **13%** increase in households and an **81%** increase in persons age 2 and older (P2+).

Sample Size Increases in LPM Markets for Final Comparison Period						
DMA	Installed Households			Persons 2+ Intab		
	Set Meter (Sept 08)	LPM (week/e 5-10-09)	% Increase	Weekly Diary (July 08)	LPM (week/e 5-10-09)	% Increase
Total	549	622	13%	826	1498	81%
Hispanic	243	268	10%	369	694	88%
Black	90	123	37%	178	325	83%

- In September 2008, its final month, the Nielsen set-meter sample size was 549 homes. The current LPM sample is now at 622 homes (+13%)
- The final month of diary measurement in Miami was July 2008 and during the average week the number of **persons 2 or older** who filled out the diary was **826**. The Nielsen LPM sample has **1,498** participants every week – an increase of **+81%**
 - Participation of **Hispanic** persons in the Nielsen sample went from **369** in the diary to **694** in LPM - **+88%**
 - Participation of **Black** persons went from **178** in the diary to **325** in LPM - **+83%**

Sample Size Increases in LPM Markets for Final Comparison Period						
DMA	Persons 18-34 Intab			Persons 25-54 Intab		
	Avg Week Diary (July 08)	LPM (w/e 5-10-09)	% Increase	Avg Week Diary (July 08)	LPM (w/e 5-10-09)	% Increase
Total	160	337	111%	342	660	93%
Hispanic	75	179	139%	161	319	98%
Black	38	81	113%	77	146	90%

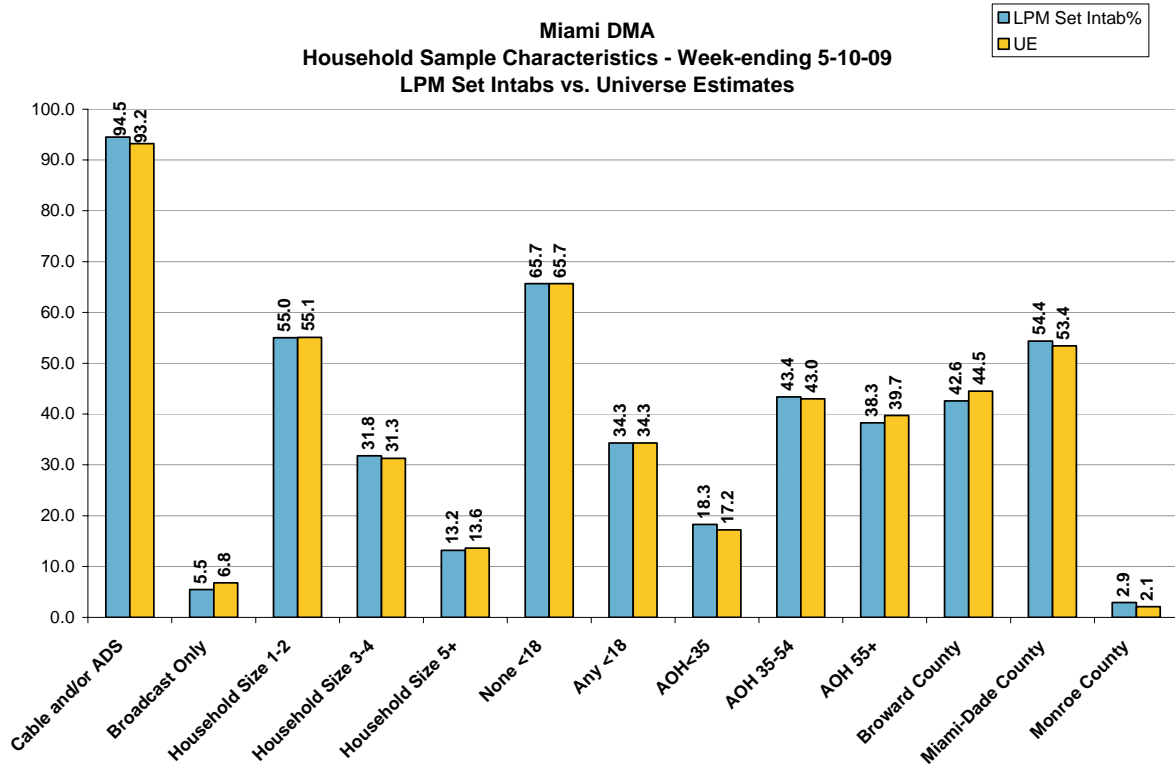
- Younger people are participating more in LPM vs the hand-written diary:
 - +111% for Persons 18-34
 - + 93% for Persons between 25-54
- **Ongoing Cooperation** of our Nielsen sample homes typically increases with the transition to LPM. The Miami market saw increases in Ongoing Cooperation of 85% with LPM.

DMA	Ongoing Cooperation			
	Sept 08			(w/e 5-10-09)
	Meter	LPM	Diff.	LPM
Miami	24.5	45.4	+85%	43.2

- Cooperation went up from 24.5% to 45.4%

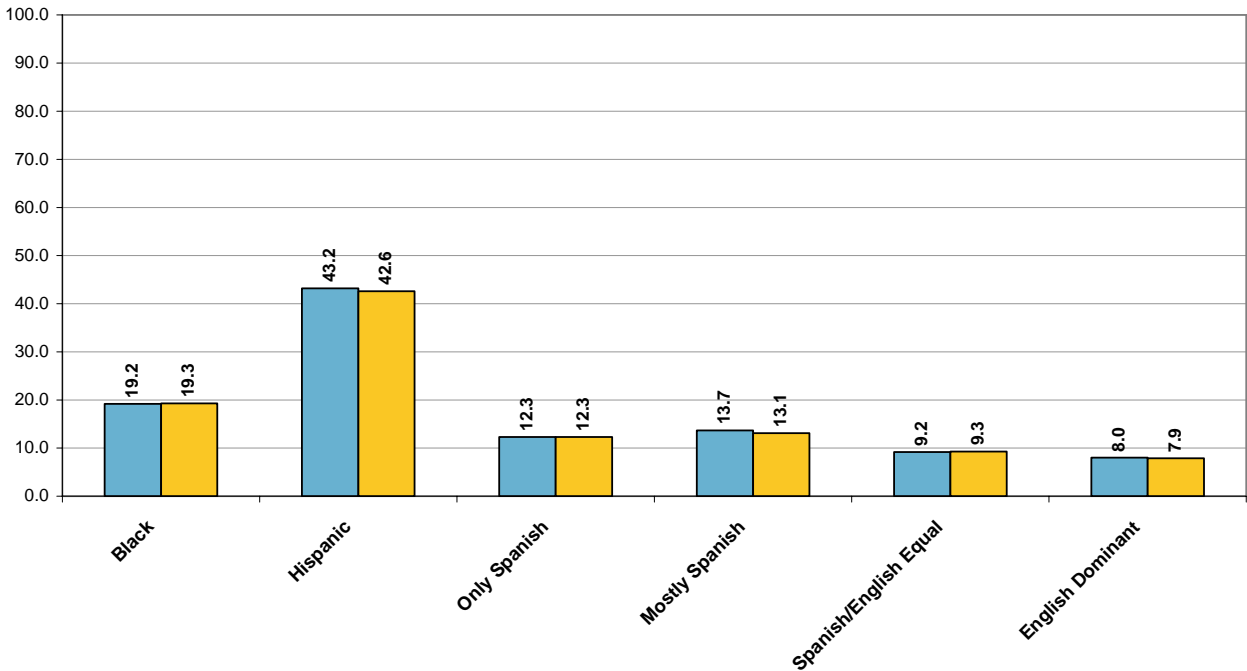
LPM Sample Characteristics are More Representative

- Nielsen's Local People Meters help bring the household characteristics of our sample more in line with the Universe Estimates (UE) of the market – in other words creating a more representative sample.



Miami DMA
Household Sample Characteristics - Week-ending 5-10-09
LPM Set Intabs vs. Universe Estimates (%)

■ LPM Set Intab%
■ UE



Viewing Differences Between Diary and Local People Meter– July 2008

- In launching LPM markets, Nielsen has observed changes in PUTs (percent of people in particular demographics watching television) by daypart and demographic. Miami has substantial increases in usage levels during dayparts such as 5-7AM, daytime and 4-5PM, while primetime and early evening showed somewhat lower usage levels.

PUT Percent Change: July 2008 Meter/Diary vs. LPM			
	Miami - Total Households		
	P18-34	P18-49	P25-54
M-F 5a-7a	39.6%	37.3%	26.8%
M-F 7a-9a	6.5%	-0.9%	-2.6%
M-F 9a-12p	6.5%	21.3%	19.7%
M-F 12p-4p	4.3%	18.8%	29.3%
M-F 4p-5p	8.7%	18.8%	30.9%
M-F 5p-6p	5.5%	-5.7%	-3.3%
M-F 6p-7p	-4.7%	-6.5%	-5.3%
M-F 7p-8p	-5.1%	-8.3%	-6.2%
M-F 8p-11p	-21.9%	-14.6%	-10.5%
M-F 10p-11p	-21.9%	-11.7%	-8.7%
M-F 11-11:30p	-17.7%	-12.4%	-8.1%
M-F 11:30p-1a	-17.2%	-5.7%	6.8%
Total Day	-8.6%	-1.3%	3.1%

- Local People Meters report viewing to more sources compared to diary measurement as a result of the larger sample size and increased accuracy involved with electronic measurement. The table below shows that most demographics had more sources with ratings credit in LPM over the diary.

MON-SUN 7AM-1AM	Miami – Total Market			
DEMO	Meter/Diary	LPM	DIFF	% DIFF
P2+	71	79	8	11%
P18+	71	82	11	15%
P18-34	62	73	11	18%
P18-49	66	83	17	26%
P25-54	65	85	20	31%
P55+	68	72	4	6%
W18-34	67	71	4	6%
W18-49	65	83	18	28%
W25-54	67	85	18	27%
W55+	71	69	-2	-3%
M18-34	63	78	15	24%
M18-49	64	82	18	28%
M25-54	62	85	23	37%
M55+	67	77	10	15%
T12-17	54	60	6	11%

- LPM tends to shift the share of rating points from higher-rated to lower-rated sources, as electronic measurement is more apt than a diary to capture real “audience fragmentation”. In Miami, this has resulted in a lower share of viewing to both English and Spanish Broadcast stations along with a higher share to cable.

M-Su 7AM-1AM Average Share of Gross Ratings Points
by Media Group – July 2008

	Miami			
	P18-34		P25-54	
	Meter/ Diary	LPM	Meter/ Diary	LPM
English Broadcast	20.4%	18.8%	28.8%	23.6%
Ad-Supp Cable	60.7%	61.9%	50.2%	54.4%
Pay Cable	4.1%	7.0%	3.0%	5.9%
Spanish Broadcast	14.1%	11.7%	17.1%	14.1%
PBS	0.7%	0.7%	0.9%	1.0%

M-F 6PM-8PM Average Share of Gross Ratings Points
by Media Group – July 2008

	Miami			
	P18-34		P25-54	
	Meter/ Diary	LPM	Meter/ Diary	LPM
English Broadcast	26.8%	21.4%	32.3%	29.1%
Ad-Supp Cable	53.7%	58.3%	42.6%	47.6%
Pay Cable	2.1%	4.9%	1.9%	3.6%
Spanish Broadcast	17.1%	15.0%	22.3%	19.1%
PBS	0.3%	0.4%	0.9%	0.6%

DVRs Increase in Miami – Creating the Equivalent of a New Competitor

- **Miami's DVR penetration increased from 14.8% to 22.5% between Feb. 2008 and Feb. 2009.** The chart below provides the time Miami households spent in viewing programming previously recorded on their DVR expressed in ratings for Feb. '08 and '09.
 - The amount of tuning to playback increased by nearly 30% during Primetime
 - The overall increase in DVR playback from year to year was +50%
 - The greater the amount of time spent tuning to DVR playback, the less time available to view live television

	DVR Playback - Miami-Ft. Lauderdale DMA				
	FEB 2008 Meter/Diary vs. MAR 2009 LPM				
	TV Households				P25-54
	FEB 08	MAR 09			MAR 09
Daypart	Set Meter Rating	LPM Rating	DIFF	% DIFF	LPM Rating
M-F 5:00AM - 6:00AM	0.2	0.3	0.1	50%	0.2
M-F 6:00AM - 7:00AM	0.3	0.5	0.2	67%	0.3
M-F 7:00AM - 9:00AM	0.5	0.7	0.2	40%	0.4
M-F 9:00AM - 12:00PM	0.7	1.1	0.4	57%	0.5
M-F 12:00PM - 4:00PM	0.8	1.4	0.6	75%	0.6
M-F 4:00PM - 5:00PM	1.1	1.6	0.5	45%	0.9
M-F 5:00PM - 6:00PM	1.3	1.7	0.4	31%	1.0
M-F 6:00PM - 6:30PM	1.6	2.2	0.6	38%	1.4
M-F 6:30PM - 7:00PM	1.8	2.4	0.6	33%	1.5
M-F 7:00PM-7:30PM	2.0	2.5	0.5	25%	1.7
M-F 7:30PM-8:00PM	2.4	3.0	0.6	25%	2.0
M-F 8:00PM - 10:00PM	3.3	4.4	1.1	33%	3.4
M-F 10:00PM - 11:00PM	3.4	5.1	1.7	50%	4.0
M-F 11:00PM-11:30PM	2.6	4.5	1.9	73%	3.3
M-F 11:30PM-1:00AM	1.3	3.3	2.0	154%	2.2
M-Su 5:00AM-5:00AM	1.2	1.8	0.6	50%	1.2

Source: The Nielsen Company. Note: LPM ratings include live viewing plus playback on a DVR viewed that same day (live+same day)

Top Ranked Programs -- Miami
Live – Persons Age 2+
Week of May 18-24, 2009

Rank	Stations/Cable Networks	Program	Date	Prg Air Times	Rating
1	23 WLTV UNI	CRISTN MON-UNI	05/18/2009	10:00 p	7.9
2	7 WSVN FOX	AM IDOL-WE-FOX	05/20/2009	8:00 p	7.2
3	7 WSVN FOX	CH7 NWS 10.00P	05/20/2009	10:00 p	5.8
4	7 WSVN FOX	AM IDOL-TU-FOX	05/19/2009	8:00 p	5.7
5	10 WPLG ABC	DANCNG-STR-ABC	05/18/2009	8:00 p	5.5
6	10 WPLG ABC	DANC-RESLT-ABC	05/19/2009	9:00 p	5.2
7	23 WLTV UNI	CUIDDO-ANG-UNI	05/20/2009	8:00	4.9
8	23 WLTV UNI	MANAN-SMPR-UNI	05/19/2009	9:00 p	4.7
9	23 WLTV UNI	MANAN-SMPR-UNI	05/20/2009	9:00 p	4.6
10	23 WLTV UNI	CUIDDO-ANG-UNI	05/19/2009	8:00 p	4.5
11	23 WLTV UNI	MANAN-SMPR-UNI	05/18/2009	9:00 p	4.4
11	TNT	NBA PLAYOFFS	05/20/2009	8:30 p	4.4
13	23 WLTV UNI	SAB GN SAT-UNI	05/23/2009	8:00 p	4.3
13	TNT	NBA PLAYOFFS	05/24/2009	8:30 p	4.3
15	23 WLTV UNI	CUIDDO-ANG-UNI	05/18/2009	8:00 p	4.3
16	23 WLTV UNI	CUIDDO-ANG-UNI	05/22/2009	8:00 p	4.1
17	23 WLTV UNI	AQ-AHR TUE-UNI	05/19/2009	10:00 p	4.0
18	23 WLTV UNI	MANAN-SMPR-UNI	05/21/2009	9:00 p	3.9
19	TNT	NBA PLAYOFFS	05/22/2009	8:30 p	3.9
20	23 WLTV UNI	CUIDDO-ANG-UNI	05/21/2009	8:00 p	3.8
20	ESPN	NBA PLAYOFFS-C	05/19/2009	9:00 p	3.8