

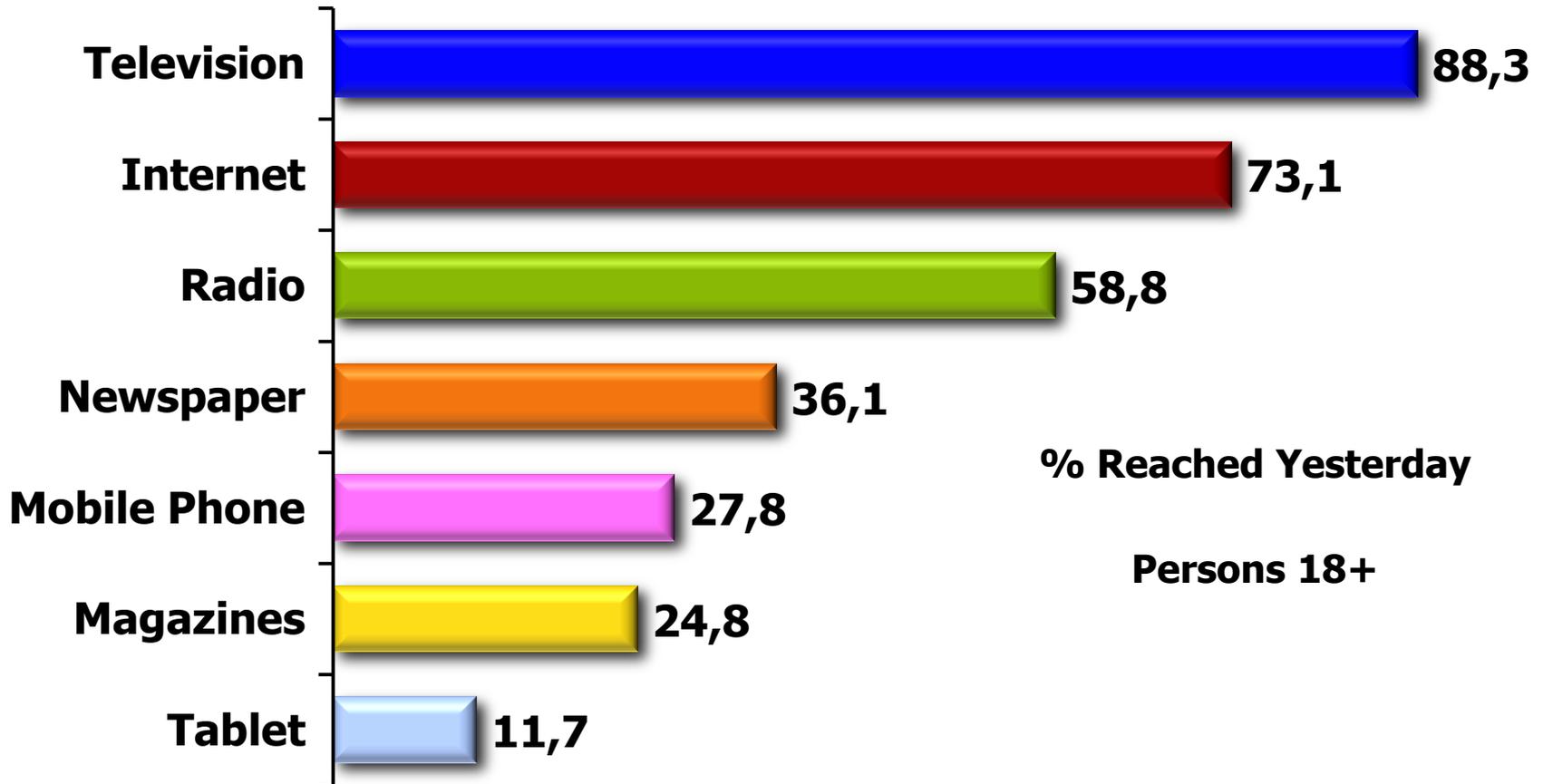


Media Comparisons 2012

Persons

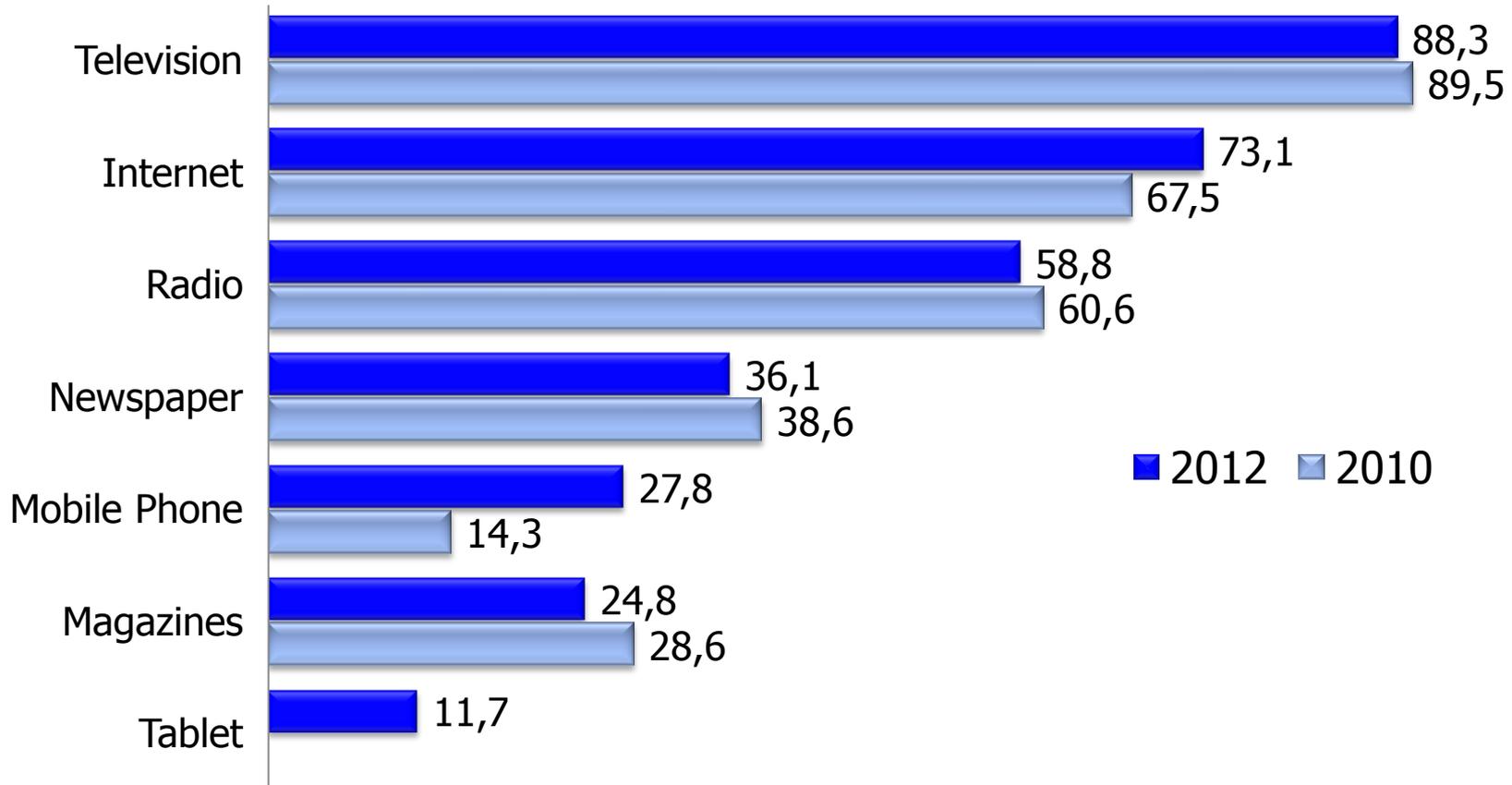


Television Reaches More People Each Day than Any Other Medium



TV Reach Remains Strong Despite Digital Growth

% Reached Yesterday: A18+



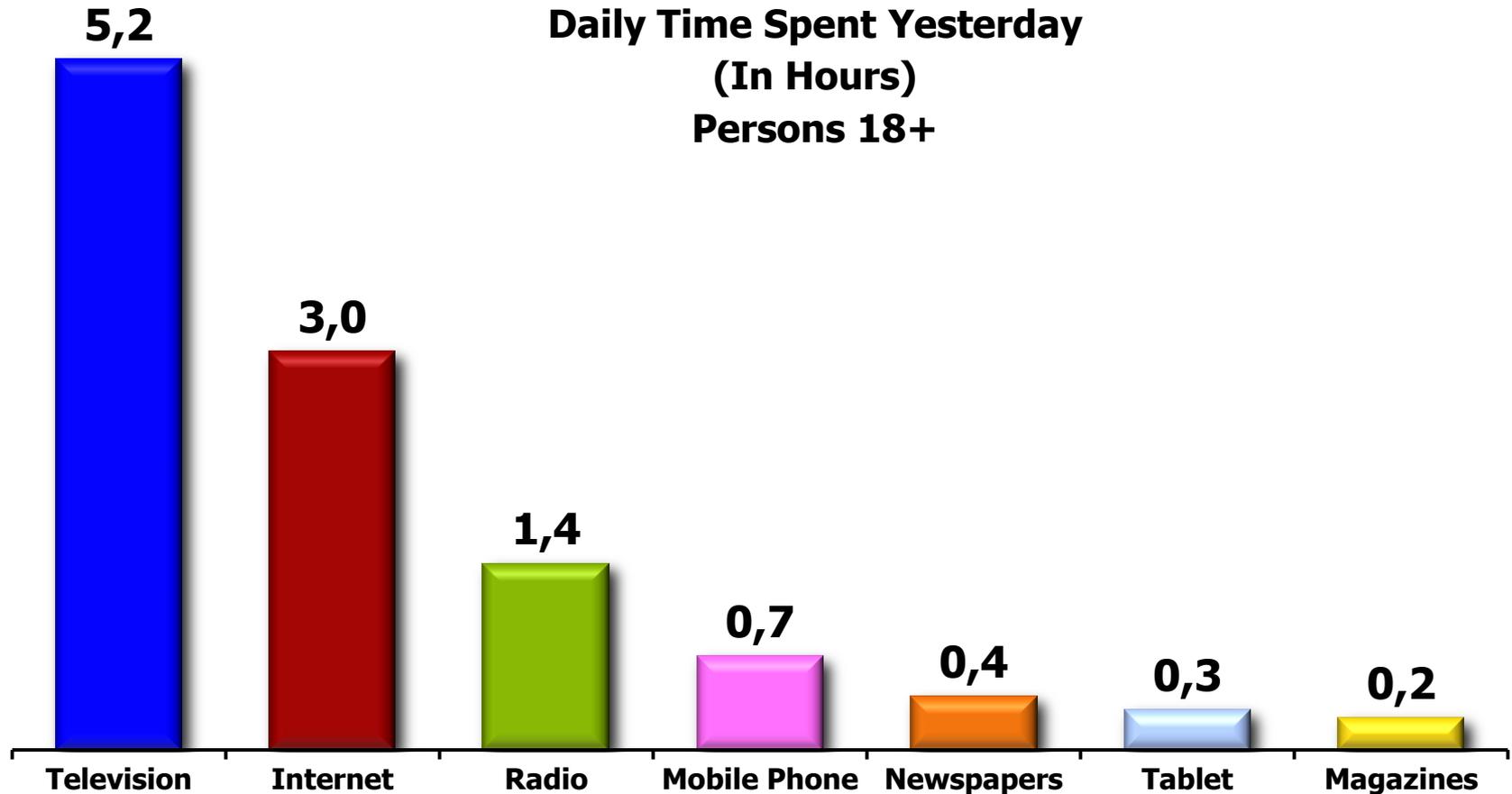
TV Reaches More People Across All Major Age Groups (%)

Age	Television	Newspapers	Radio	Magazines	Internet	Mobile Phone	Tablet
18+	88.3	36.1	58.8	24.8	73.0	27.8	11.7
18-34	84.0	21.4	59.7	16.2	74.2	46.0	16.8
18-49	85.3	23.9	62.3	19.5	75.4	39.7	14.5
25-49	86.0	24.1	64.6	20.2	74.9	38.8	14.3
25-54	86.7	26.5	65.3	20.4	75.6	36.2	14.6
35-64	89.1	36.2	63.2	25.6	75.2	24.9	11.4
65+	93.7	61.3	44.1	37.4	64.3	4.8	4.1
13-17	76.6	14.4	56.9	24.2	76.3	21.3	17.1

TV Reaches More Upscale Households (%)

Household Income	Television	Newspapers	Radio	Magazines	Internet	Mobile Phone	Tablet
Under \$25K	83.7	29.9	47.8	18.9	62.4	16.2	3.5
\$25K-\$50K	85.2	34.8	55.5	23.5	68.3	23.4	5.9
\$50K-\$75K	87.7	37.7	64.3	25.6	72.3	33.1	15.5
\$75K+	90.4	34.7	63.3	28.0	82.0	32.4	18.6
\$100K+	90.5	35.1	66.1	29.7	83.4	35.8	23.8

People Spend More Time with Television Than with Any Other Major Medium



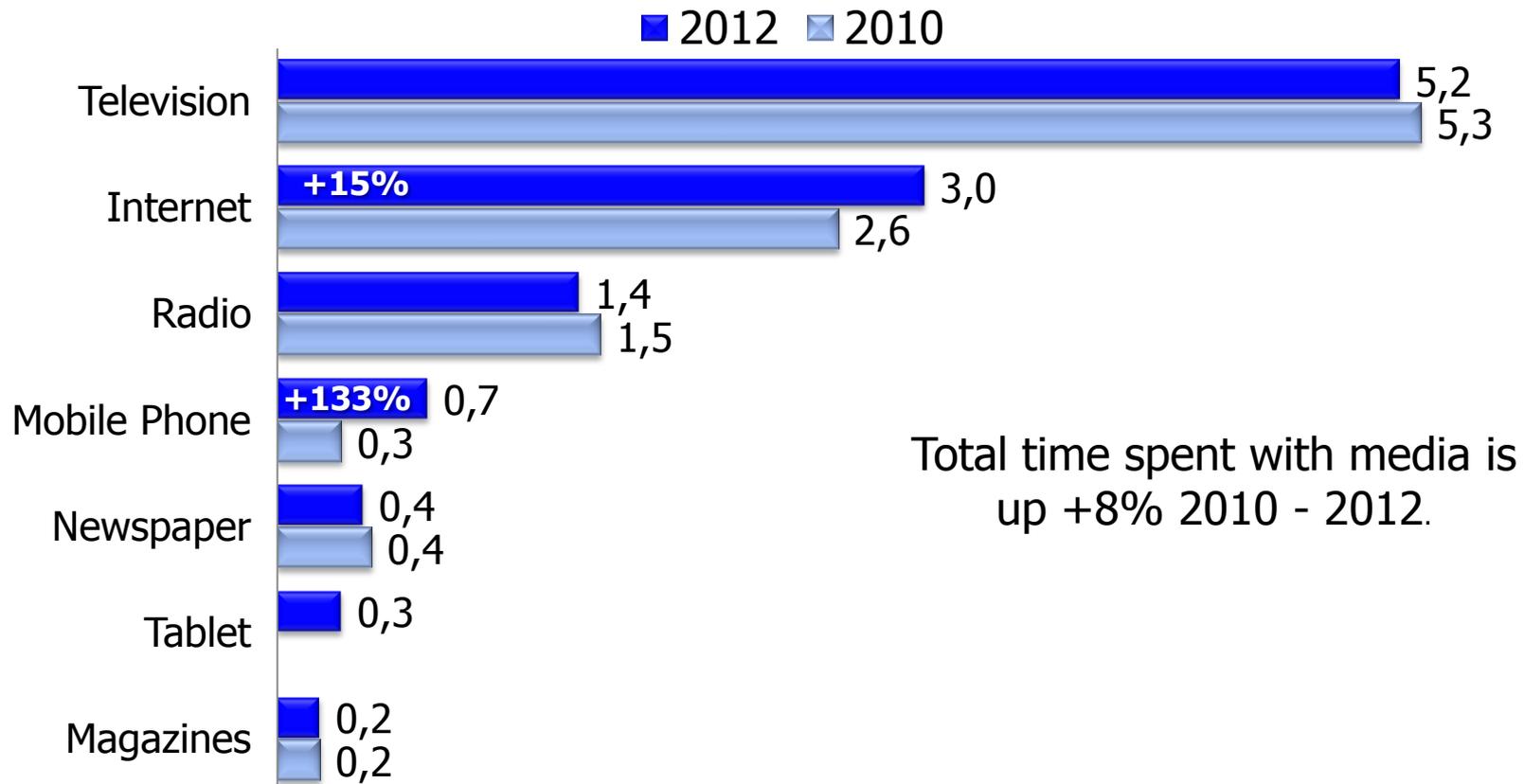
Women Spend More Total Time With Media; Television Dominates Time Spent for Both Genders

Average Daily Time Spent (In Hours)

Adults	Television	Newspaper	Radio	Magazines	Internet	Mobile Phone	Tablet	Total
W18+	5.42	0.38	1.45	0.30	3.26	0.84	0.36	12.01
M18+	4.97	0.42	1.39	0.18	2.75	0.51	0.25	10.47

Total Time Spent with Media is Up; Time Spent with TV Continues to Dominate

Average daily time spent in hours: A18+



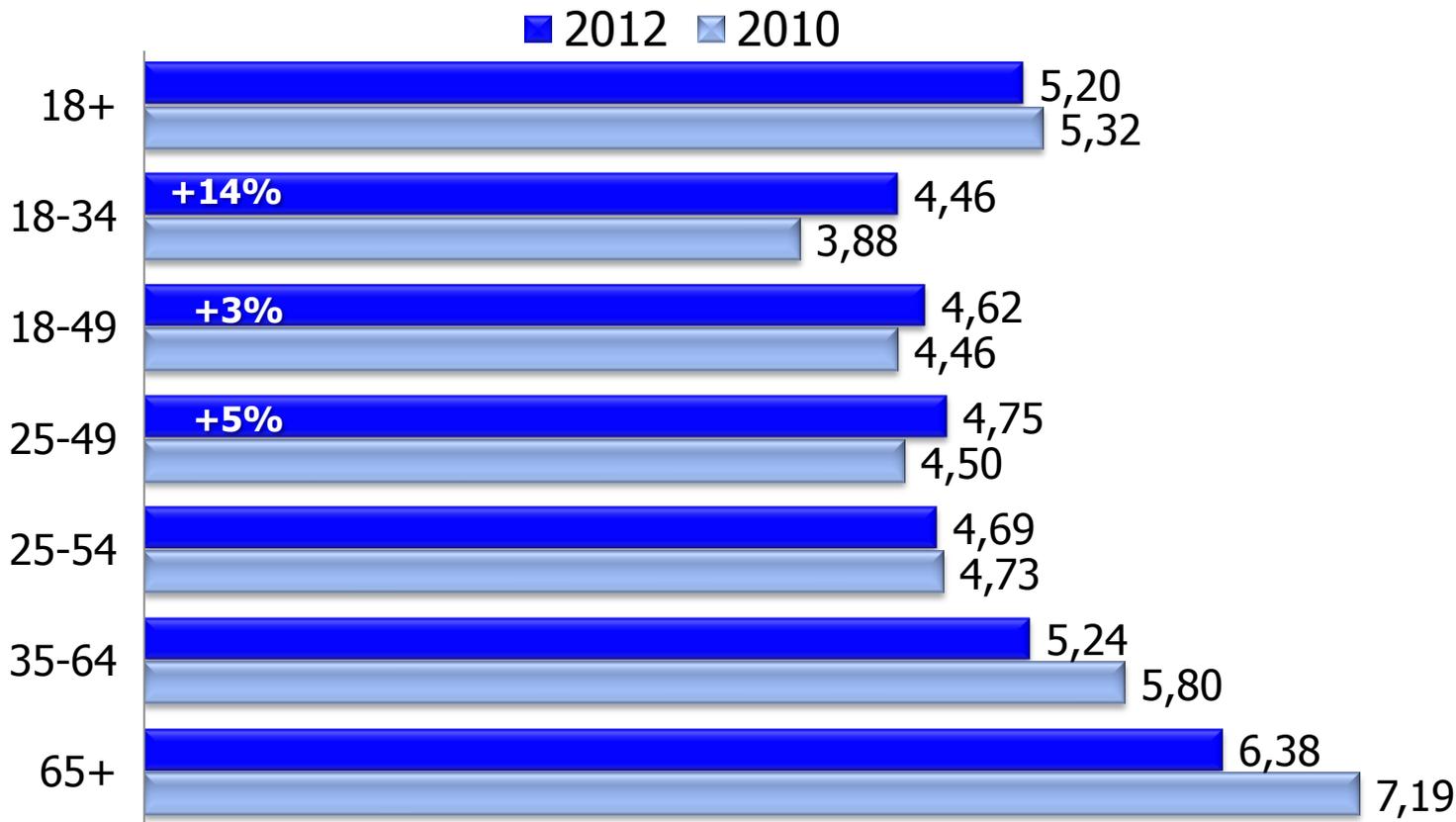
Time Spent with TV Tops Other Media Across Demographic Groups

Average Daily Time Spent (In Hours)

Age Persons	Television	Newspapers	Radio	Magazines	Internet	Mobile Phone	Tablet
18+	5.20	0.40	1.42	0.24	3.01	0.68	0.31
18-34	4.46	0.23	1.34	0.20	3.50	1.37	0.50
18-49	4.62	0.24	1.53	0.19	3.34	1.05	0.42
25-49	4.75	0.26	1.63	0.20	3.10	0.89	0.37
25-54	4.69	0.30	1.68	0.20	3.12	0.80	0.38
35-64	5.24	0.38	1.58	0.21	3.01	0.48	0.27
65+	6.38	0.74	1.07	0.41	2.16	0.09	0.08
13-17	3.14	0.11	1.01	0.16	2.30	1.12	0.39

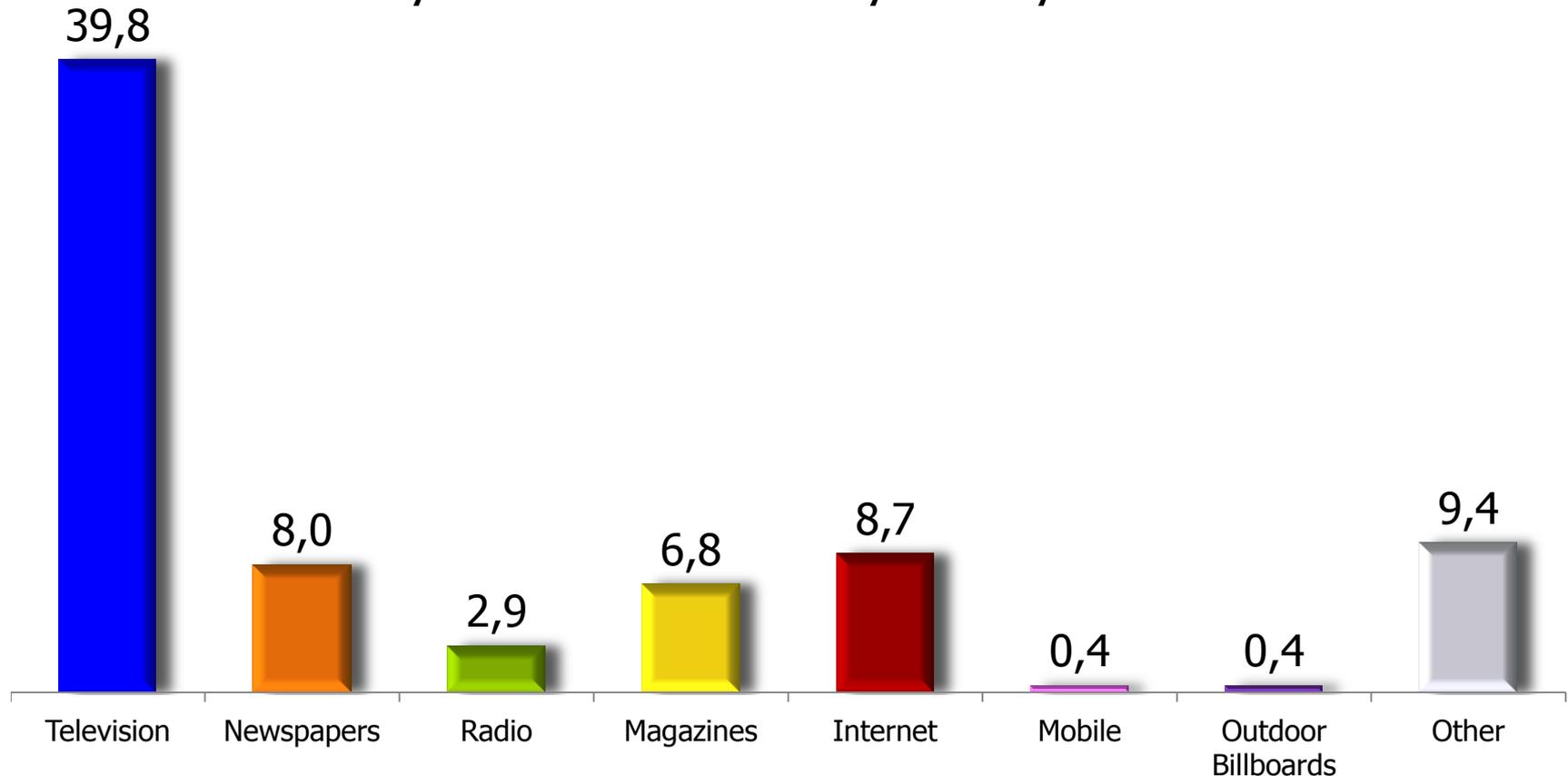
Younger Demographic Groups are Increasing Their Time Spent with Television

Television Average daily time spent: (In Hours)



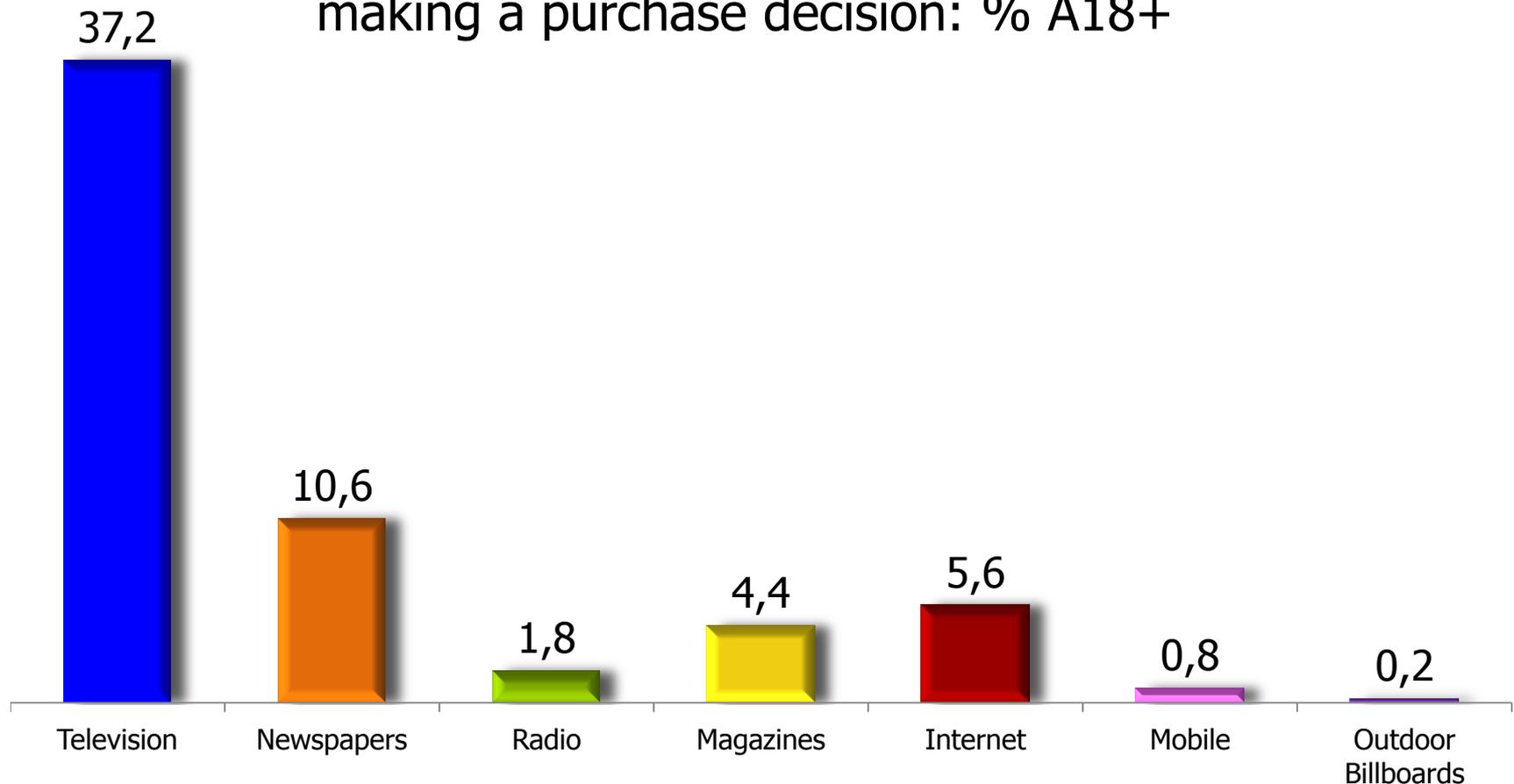
More People Learn About Products They Would Like to Try or Buy From TV Commercials

Source most likely to learn about products or brands you would like to try or buy: % A18+



Television is Most Influential in Making a Purchase Decision

Advertising medium most influential in making a purchase decision: % A18+



Television Influences More Purchase Decisions Across All Major Age Groups (%)

Age	Television	Newspapers	Radio	Magazines	Outdoor Billboards	Internet	Mobile Phone
18+	37.2	10.6	1.8	4.4	0.2	5.6	0.8
18-34	40.8	3.2	2.2	3.4	0.1	7.4	1.4
18-49	40.2	5.6	1.9	3.2	0.3	6.4	1.3
25-49	40.1	6.0	2.2	3.0	0.4	5.9	1.6
25-54	39.9	7.3	2.2	3.7	0.3	6.0	1.4
35-64	36.5	12.3	1.7	4.6	0.3	5.4	0.6
65+	32.7	18.5	1.6	5.3	0.0	2.9	0.0
13-17	36.4	0.9	0.8	5.2	3.1	12.0	0.0

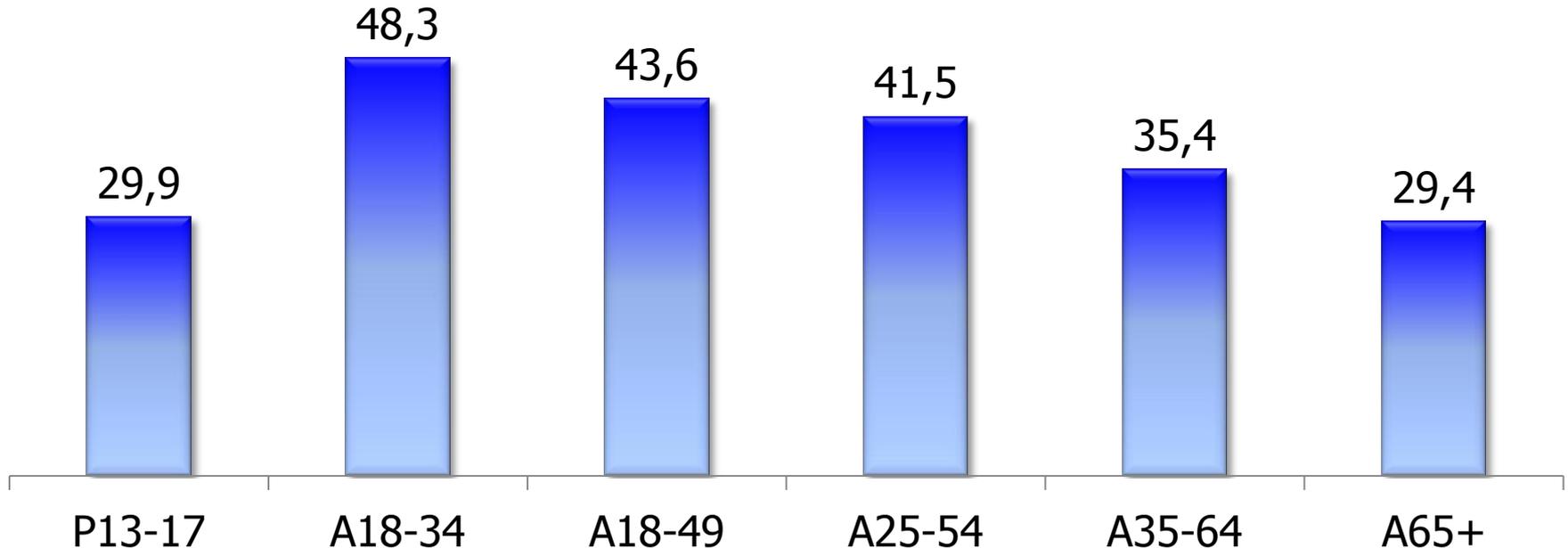
Consumers Are Enhancing Their TV Experience

Adoption of new technology and synergistic media capability is growing.

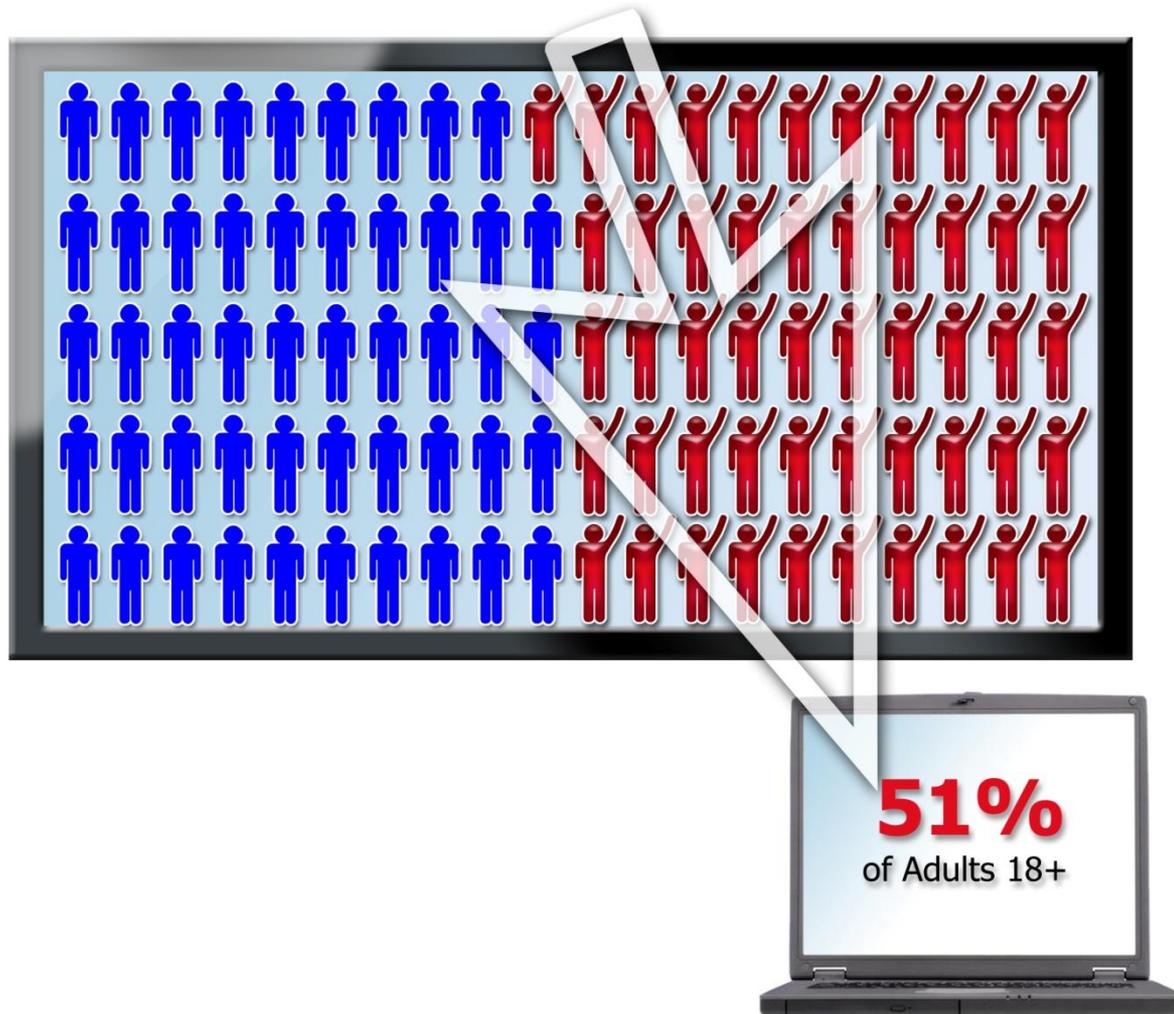
- 69.4% of adults 18+ have HD TV sets.
 - 37% are Internet-capable
 - 8.5% have 3-D capability
 - A25-54 3-D capability is at 11.2%

Viewers Are Savvy About HD Quality

Do you notice when a commercial on an HD channel isn't being shown in HD format? (%)



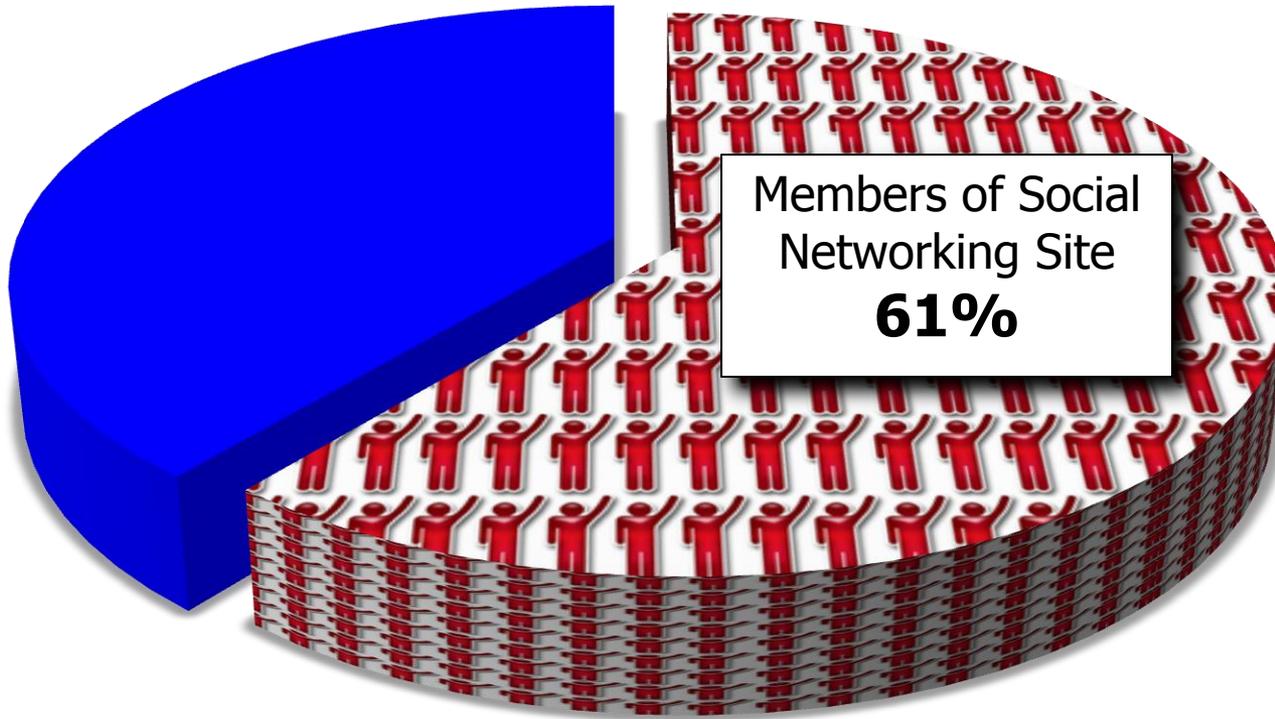
51% of Adults Say a TV Ad Prompted Them to Go Online to Find Out More



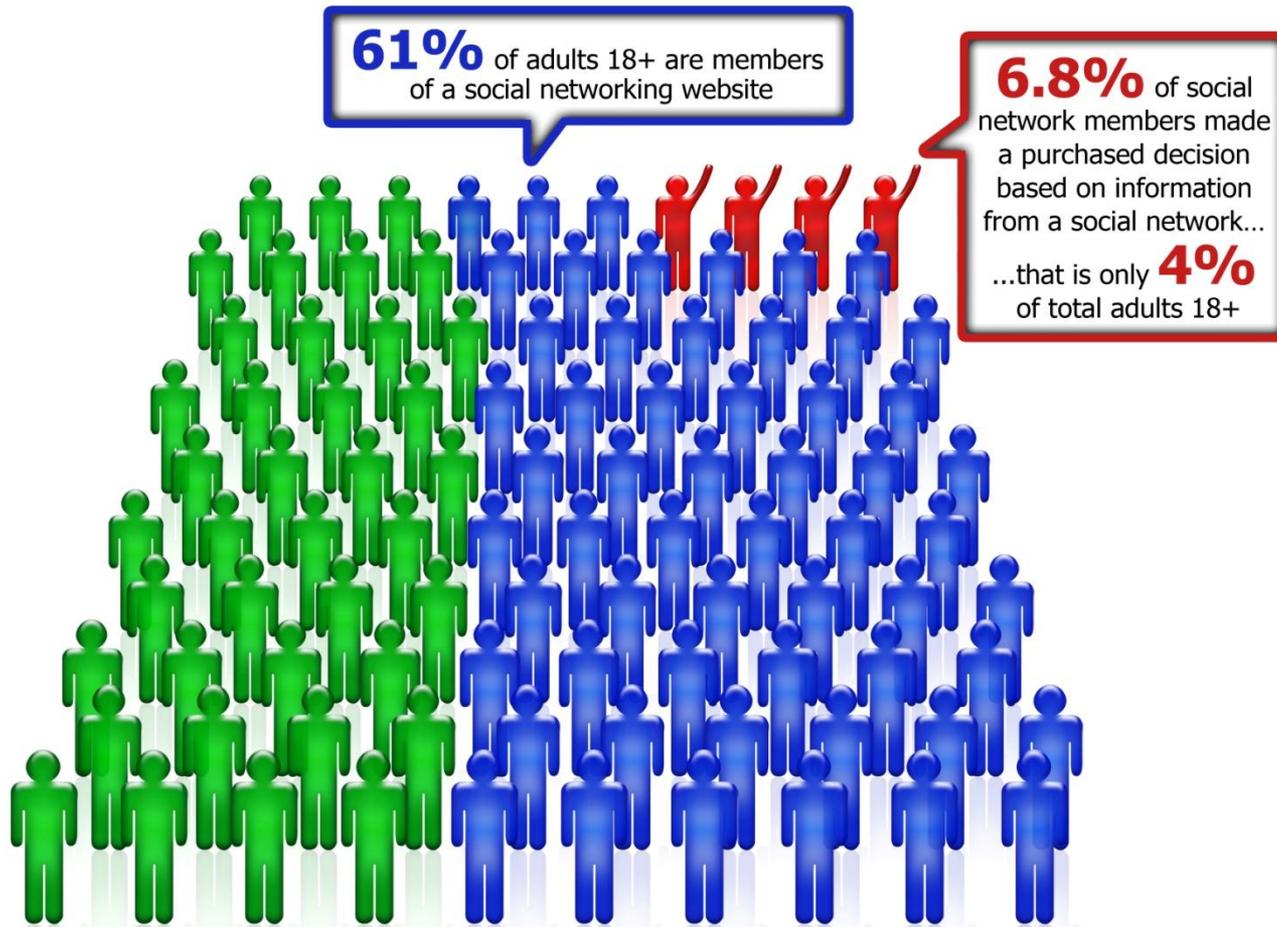


Social Networks Have Reached Critical Mass

A18+



Social Networks are Not Primary Drivers of Consumer Purchases



Q. "Have you made a decision to purchase a product or service based on information from a social network site in the past six months?"

Mobile Phone Content Impact

Nearly half of mobile phone owners 18+ have smart phones and access Internet content. Teens are reaching adult penetration levels.

- 86% of adults 18+ own a mobile phone
 - 46% have smart phones
 - Smart phone ownership up +93% from 2010
 - 41.5% of smart phone owners access Internet content via phone
 - Highest demographic group is A18-49 at 54.5%

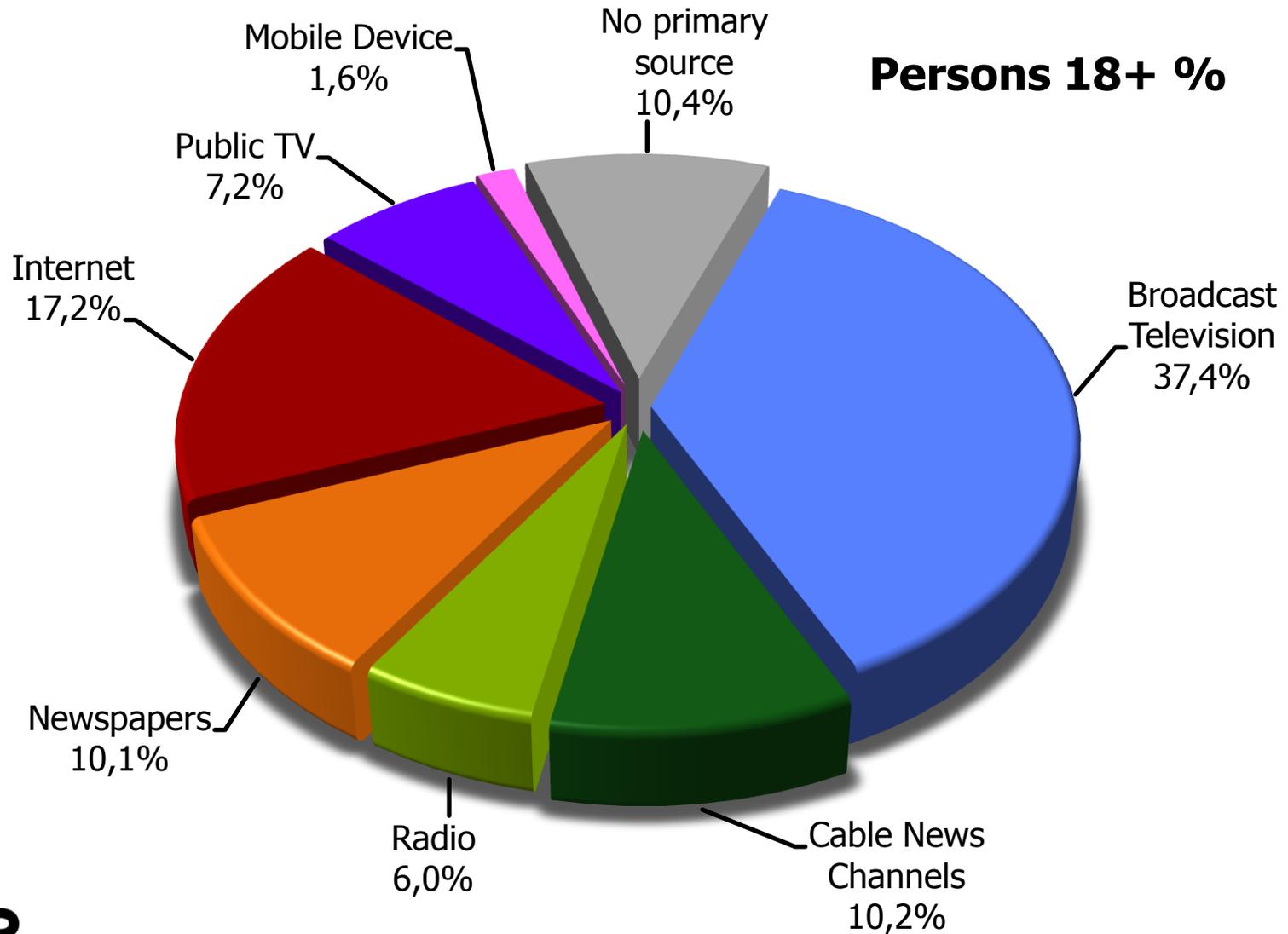
- 74% of Teens 13-17 own a mobile phone
 - 37.5% have smart phones
 - Smart phone ownership up +58% from 2010
 - 39% access content on the Internet via phone

Content Accessed on Cell Phone or Mobile Device

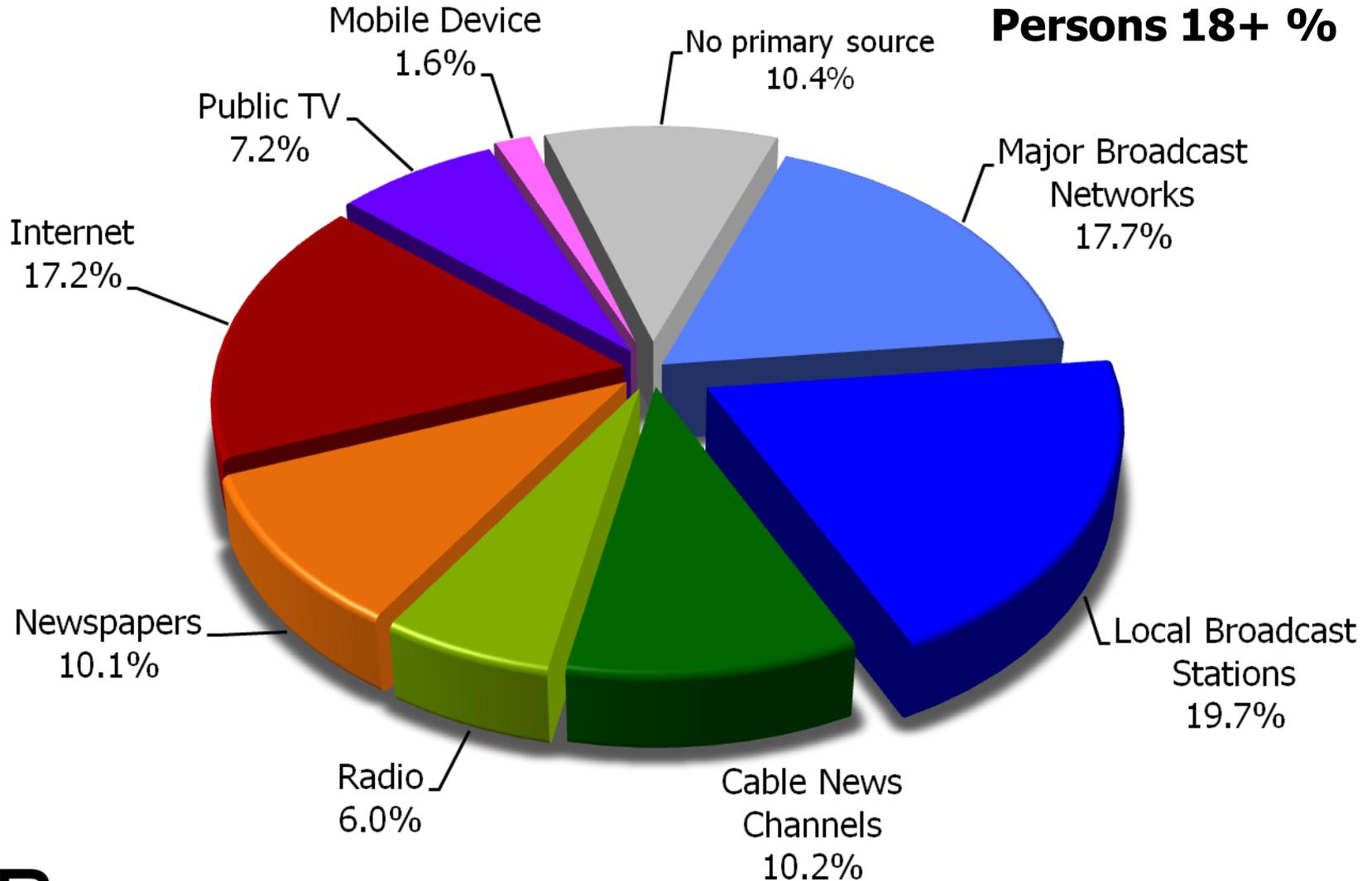
A18-34 leads content viewing, but the behavior is strong across core demos.

Age	% Smart Phone Users Viewing Internet Content on Mobile	% Total Persons
13-17	39.0	29.0
18+	41.5	35.0
18-34	62.2	56.0
18-49	54.6	48.0
25-49	51.3	45.0
25-54	49.1	43.0
35-64	38.0	32.0
65+	9.8	7.0

Broadcast Television is the Primary Source of News for Adults



Local Broadcast Stations Out-Deliver Cable as a Primary Choice for News



Local Broadcast Is the Top News Choice Across Demographic Groups

Primary Source of News (%)

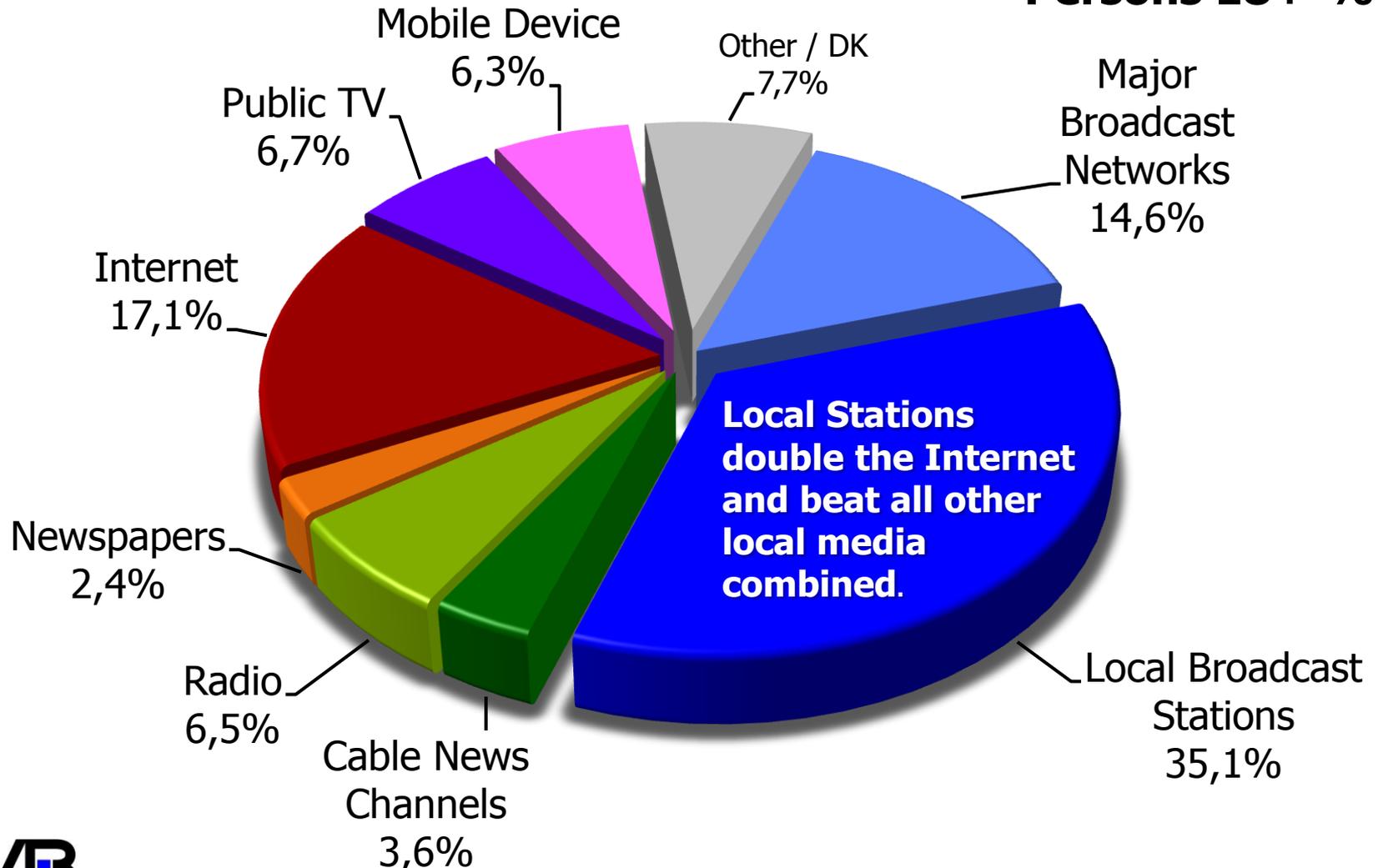
Age	Local Broadcast Stations	Major Broadcast Networks	Cable News Networks	Radio	Newspaper	Internet
18-34	13.7	12.6	8.4	7.2	5.2	26.1
18-49	18.3	13.1	7.4	6.4	6.3	23.8
25-49	21.2	13.0	6.8	6.5	6.1	23.0
25-54	20.3	13.9	7.6	6.9	6.7	22.2
35-64	21.8	18.2	8.8	6.2	10.5	16.9
65+	23.7	25.3	17.4	3.2	17.4	4.7
13-17	12.6	9.7	3.6	3.3	2.2	29.0

During Breaking News, Adults Turn First to Local Broadcast TV Stations

	A18+
Local TV Stations	21.3
Major broadcast networks	21.1
Internet	18.4
Cable news networks	16.7
Radio	3.2
Newspaper	0.5

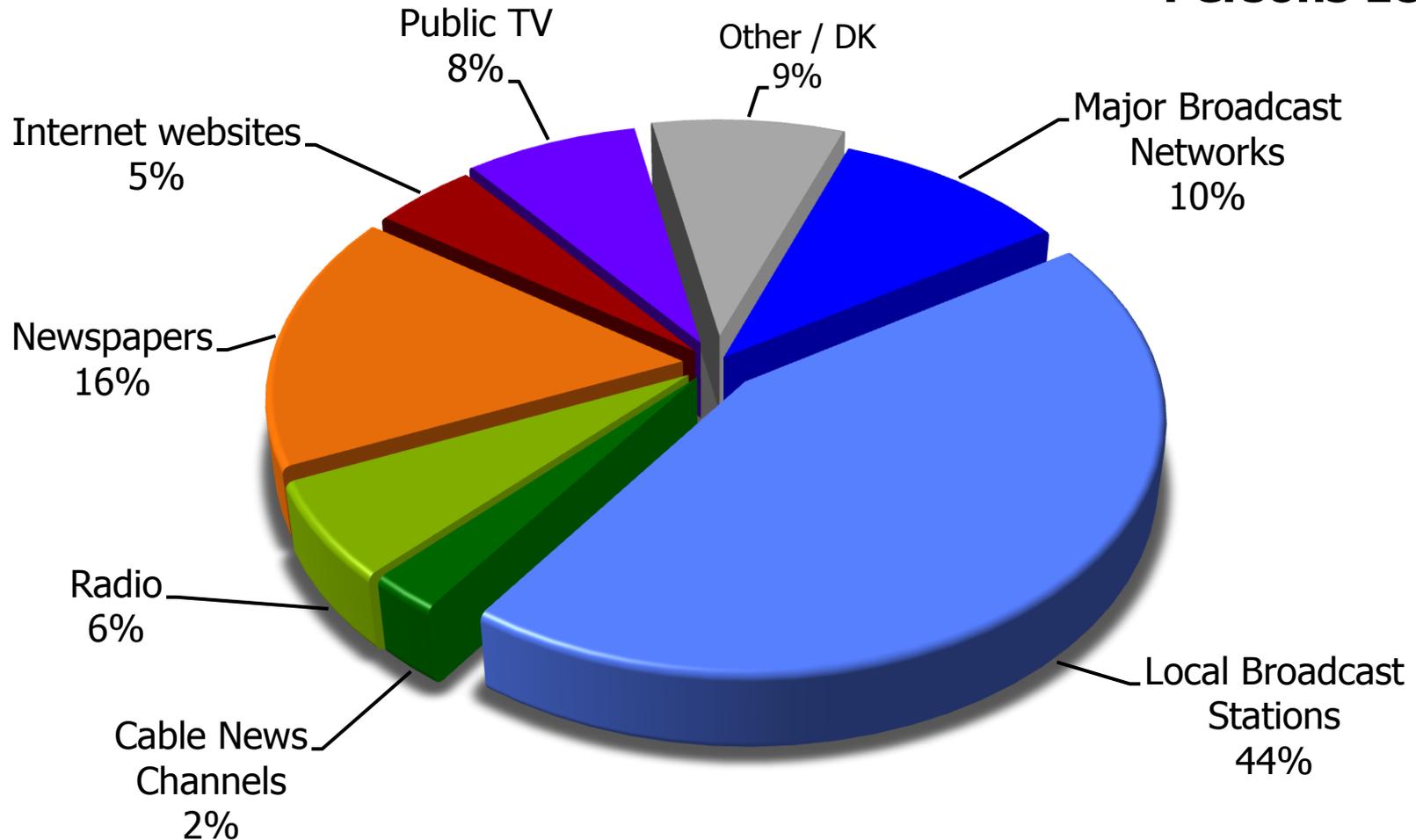
Local Broadcast Stations are the Top Source for Local Weather, Traffic or Sports

Persons 18+ %



Local Broadcast Stations are Considered Most Involved in the Community

Persons 18+

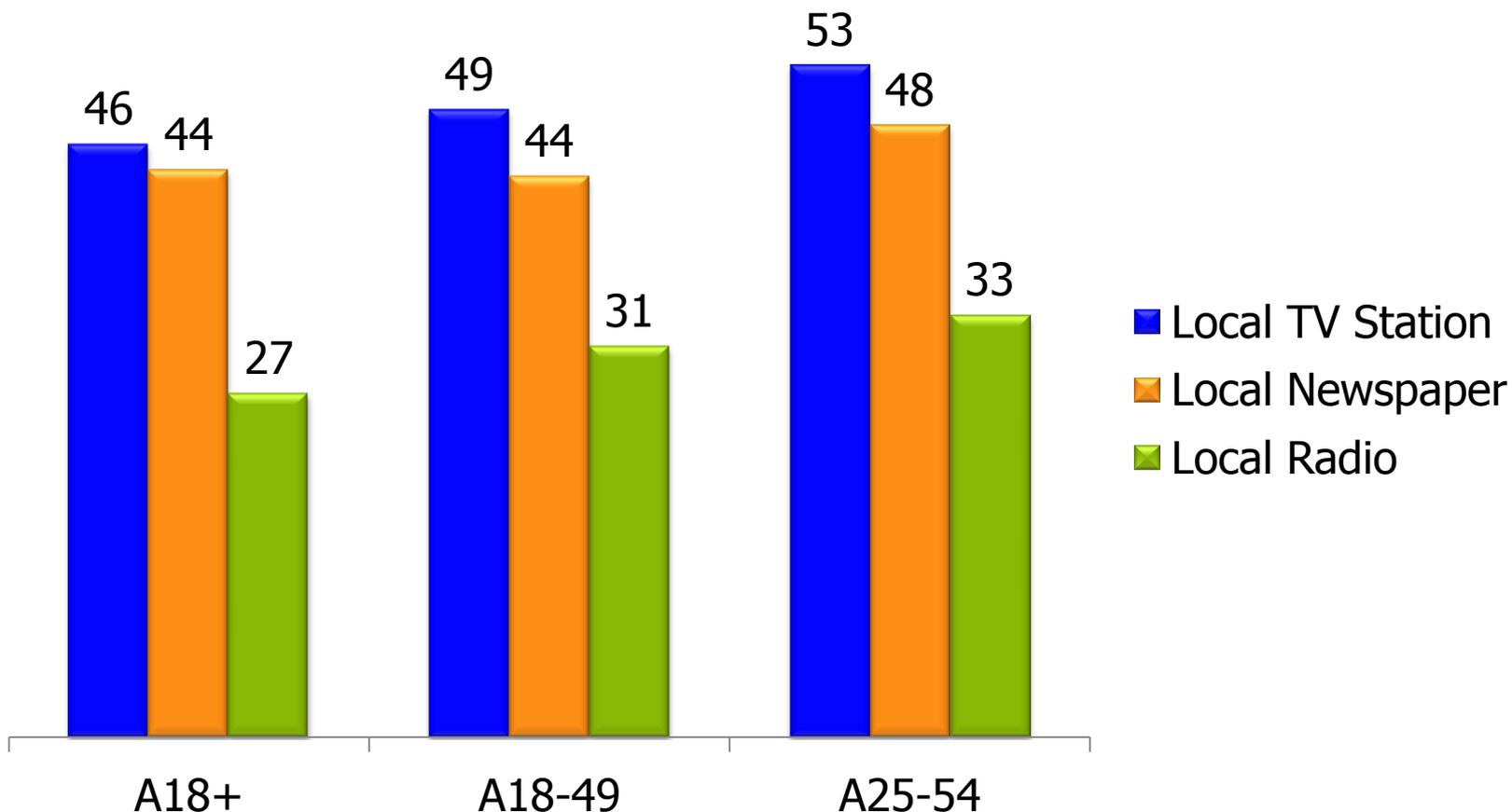


Local Broadcast Station Websites are the Top Source for Local News and Event Information

Local Website (s) %	P13-17	A18+	A18-34	A18-49	A25-54	A35-64	A65+
Broadcast Station	54.5	57.4	53.7	57.1	58.2	59.4	57.5
Newspaper	23.5	41.3	41.1	40.5	39.7	40.6	44.6
Radio	15.2	9.8	12.2	10.7	11.4	9.6	5.1
Other Local Site(s)	15.7	6.6	5.1	5.6	6.4	7.5	6.4
None/Don't know	-	1.8	0.7	1.8	1.8	2.6	1.0

Nearly Half of Adults Visit Local Broadcast Station Websites on Average

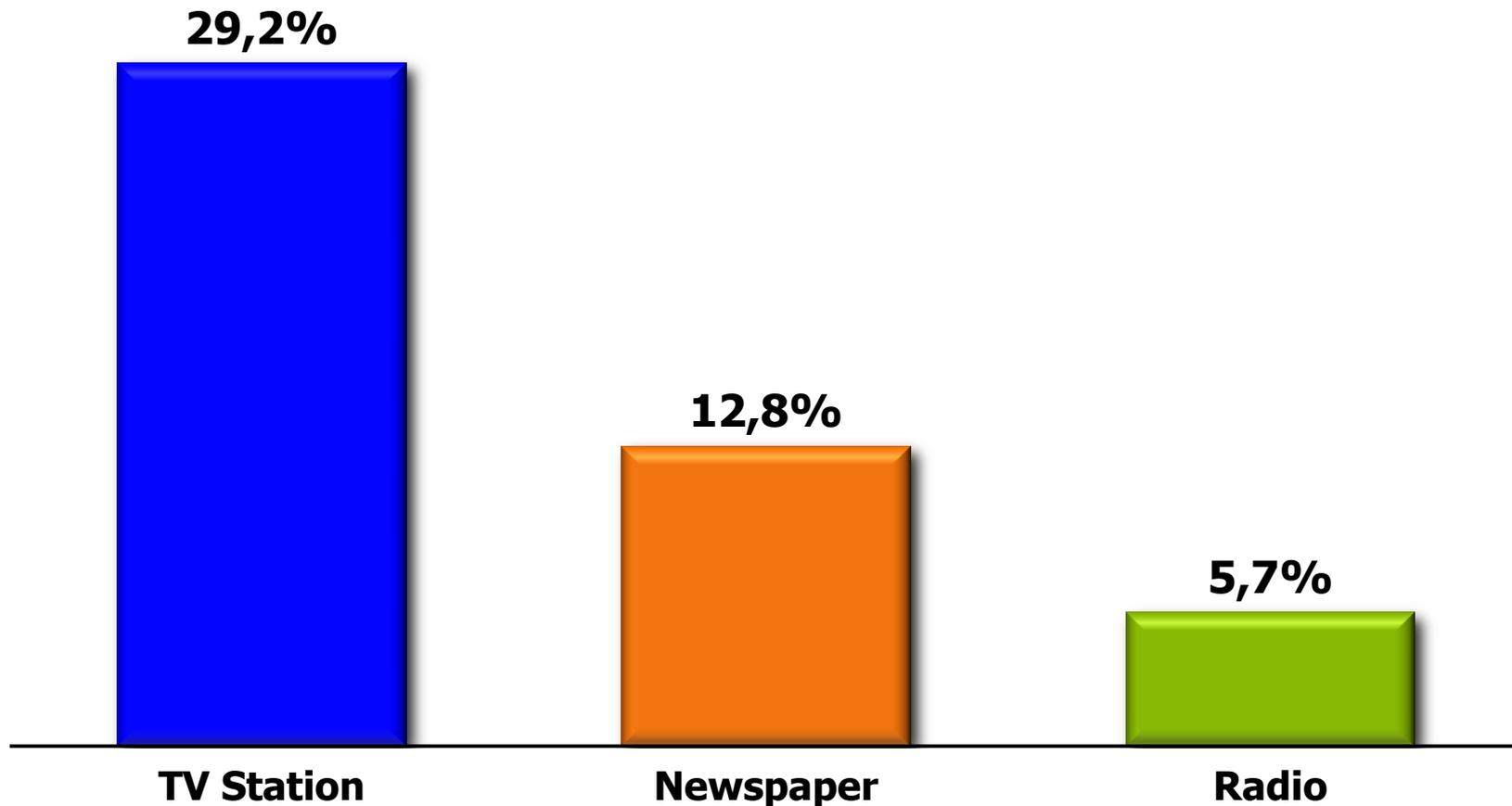
(%) Visited Website in Past 30 Days





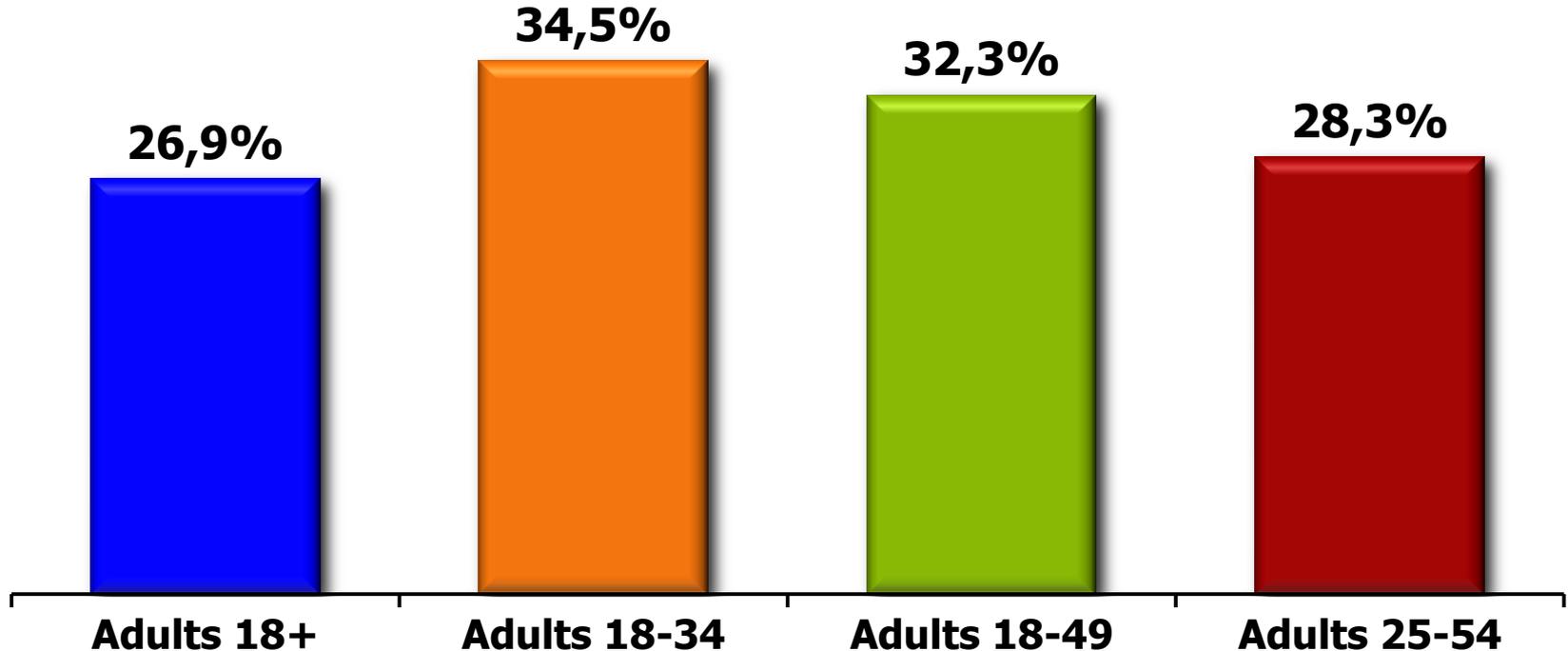
TV Stations More than Double the Reach of Online Video Viewers Than Other Local Sites

(%) A18+ who watch video on local websites



One-Third of Video Viewers on TV Station Websites are Regular Pre-Roll Ad Viewers

% watch pre-roll ads most or every time



TVB Media Comparisons Study Methodology

- In the field in Q1 2012
- Conducted by Knowledge Networks, utilizing their “Knowledge Panel”
 - Online survey
 - Includes cell-phone only homes
- 1,557 respondents in total
 - 1,433 A18+
 - An additional 124 Persons 13-17

Thank You