

Nielsen Media Research

2 0 0 0 R E P O R T O N T E L E V I S I O N



The First
50 Years



A LETTER FROM THE PRESIDENT

Fifty Years. As the world celebrates the new millennium, fifty years nearly sounds insignificant. Not to us. That is because we at Nielsen Media Research are celebrating fifty years as an important part of the extraordinary success of television; the most accessible, most pervasive medium of the Twentieth Century.

We are especially proud of our role as an innovator in providing quality measures of audience—derived from world-class samples, technology, software and people—that the television and advertising industries rely on to understand how

audiences use television and respond to programming and commercial messages.

Today, the most powerful medium of the Twentieth Century is bonding with the most powerful new medium of the Twenty-First Century—the Internet. Together and separately these media will depend on independent, third-party measures of audience, embracing the highest standards of accuracy and integrity, to function effectively in a commercial marketplace that seems to be reinventing itself every few years. Digital communications, satellite distribution, interactive media, as well as consumer

access to media from anywhere at anytime are all combining to create huge marketing opportunities for business—and challenges for new measurement solutions from Nielsen Media Research.

In today's www.com environment, we scarcely have time for a backward glance. Has it really been fifty years? It seems as though we went from Milton Berle and "The Golden Age of Television" to MTV mighty fast. Think of the technology separating



John A. Goring, President and CEO

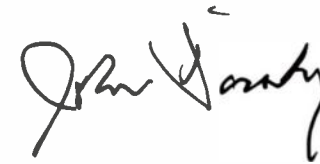
Sputnik from the Hughes Galaxy generation of direct-TV satellites; or the technology separating the TV remote from Personal Video Recorders, such as TiVo and Replay with their browsing, menuing and storage capabilities. People used to wonder if there could possibly ever be enough programming—or advertising—to fill all those new cable TV channels; then along came CNN, ESPN, HGTV, USA, Home Shopping and dozens of others to successfully compete for audience shares.

The success of television—including the proliferation of broadcast and cable networks, television stations, program suppliers, and the billions of dollars in advertising expenditures necessary to fuel this growth—is connected to the measurement service which, independently, samples the audience and reports the information to the marketplace. This information—the ratings—is the currency of television. Guaranteeing the value of this currency is the Number One priority of Nielsen Media Research, as it has been for fifty years.

As we begin the Twenty-First Century, we know that television will never be the same. Technology has changed everything. New generations of audience will use media differently. They will, for instance, be much more comfortable in a converged environment where television and the Internet are indivisible.

As we attempt to look just over the horizon to develop the best methods of measuring the media environment, we see a hybrid world where existing technologies and viewing behavior live side by side, even in the same household, with the digital and the interactive. No single measurement system will do everything. The future can't be measured by a one-size-fits-all device. That is why we are developing and testing a portfolio of technologies and software systems that will enable us to provide a complete measurement of audience in a changing media environment.

In this sense, our responsibility at Nielsen Media Research is clear. It is the same as it has been for fifty years: to provide accurate, objective information about the actual actions of consumers in our research samples. Today those actions involve tuning into television programs, visiting a website, or doing both at the same time. We are proud to have contributed to the extraordinary success of television. I am confident, looking forward, that Nielsen Media Research is poised to be a part of the limitless future of media.



John A. Dimling
President and Chief Executive Officer

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INTRODUCTION & GENERAL INFORMATION

The name Nielsen Media Research is synonymous with television ratings and media research. The ratings provide an objective estimate of television audience size and composition. They are a barometer of people's viewing habits. In addition to providing television audience estimates, Nielsen Media Research provides competitive advertising (including television, radio, and print) intelligence services, as well as information on interactive television and Internet usage.



Nielsen Media Research is headquartered in New York City with offices throughout the United States and Canada. Nielsen Media Research is owned by VNU, a publicly traded international publishing and information company headquartered in Haarlem, the Netherlands. VNU's operations include marketing information services, consumer and business magazines, newspapers, directory information services, educational textbooks, trade shows and entertainment. Despite having a similar name, Nielsen Media Research is no longer a part of ACNielsen Company.

Our role is to provide high-quality estimates of audiences through a fair and open system that objectively reports viewership. Our customers use Nielsen Media Research's television audience estimates to buy and sell television time. That information is the currency in all the transactions between buyers and sellers, which adds up to approximately \$45 billion in national and local ad spending each year. Without an independent, completely neutral, third-party measurement system embracing the highest standards of accuracy and integrity, the television marketplace could not function effectively. Assuring the quality of the ratings and the value of this currency is the Number One priority of Nielsen Media Research.

Nielsen Media Research is one of the most widely known names in the media industry. Because of our unique role, we have achieved visibility disproportionate to our size. People have heard about the "Nielsen families"

and TV households that participate in our research, and they understand that our audience measurement—reported as "ratings"—helps determine the success or failure of television programs.

Few, however, recognize the complexity of our daily task. In television's earlier years, the typical household could receive three network telecasts plus an independent signal and maybe public television. The task of audience measurement was comparatively easy. Now, however, there are seven English-language broadcast networks in the U.S., two Spanish-language networks, more than 100 national syndicators, more than 1,000 television stations, more than 100 cable networks and thousands of cable systems. They rely on the timely and accurate delivery of our data to plan and operate their businesses. Also, in Canada, there are four national broadcast conventional networks—two English-language and two French-language—and 39 national specialty, or cable, channels.

How the data are collected

The heart of the Nielsen Media Research national ratings service is the People Meter, an electronic metering system placed in randomly selected households—5,000 households in the U.S. The People Meter is placed on each TV set in a sample household. The meter measures two things—what channel or station is being tuned, and who is watching. The People Meter

is used to produce household and persons audience estimates for broadcast and cable networks and nationally distributed barter-syndicated programs. The channel-tuning status of each TV set in the sample home is continually monitored by one part of the meter which has been calibrated to recognize which station or network is carried on each channel in the home. Channel changes are constantly monitored and updated for both over-the-air, satellite and cable delivered signals. The ratings data are reported on an average-minute basis.

Who is watching television is measured by another portion of the meter, the "People" part. This consists of a fixed "box"—about the size of a book—and an accompanying remote control unit. Each family member of the sample household is assigned a personal viewing button (identified by name) on the People Meter. The Nielsen Media Research representative matches the assigned button to the age and sex of each person in the household. Whenever the television set is turned on, a light flashes on the meter, reminding viewers to press their assigned button to indicate when they are watching television. Additional buttons on the meter enable guests who are watching television to participate in the sample by entering their age, sex, and viewing status into the system.

In nearly 50 of the nation's largest markets (see page 48 for metered market schedule), a similar electronic metering system is used by Nielsen Media Research to provide set-tuning information on a daily basis. In these cases, TV-set-tuning information is collected

from a separate sample of homes, and overnight household tuning ratings are reported on a daily basis. This household tuning information is augmented at least four months of the year with demographic viewing data, which is collected from another sample of households, which maintain a paper-viewing diary for one week. Each household member in the diary sample is asked to write down what programs and channels they watch over the course of that one-week. In the 50 Metered Markets, the diary and meter information from the separate samples are merged to produce the standard sweep reports.

Diary measurement is used to collect viewing information from sample homes in every television market in the United States. Each year we process approximately 2 million paper diaries from households across the country for the “sweeps” ratings periods. The standard report months—the “sweep” months—include November, February, May and July of each year. This local viewing information provides a basis for program scheduling and advertising decisions for local television stations, cable systems and advertisers. In some of the larger markets, there are as many as three additional months (October, January and March) during which diaries are used to provide viewer information.

To help provide a total measure of television viewing activity, Nielsen Media Research has established separate national and local samples to capture viewing habits of Hispanic viewers to Spanish-language TV

networks and stations in the U.S. Special methods are used to elicit cooperation and ensure that the sample accurately reflects all types of Spanish-language usage in the community. NSI also plans to introduce local people meter measurement in Boston and nine additional markets to be announced depending on customer support.

How the data are processed

Household tuning and persons viewing data from both the national and local samples for each day are stored in the in-home metering system until they are downloaded to Nielsen Media Research’s computers each night. Data include: when the set is turned on; which channel is tuned; when the channel is changed; when the set is turned off; and, for the People Meter households, when each viewer starts and stops viewing. In addition, program lineups and station/cable carriage information are used to credit this viewing to the correct program.

Our Operations Center in Dunedin, Florida, processes this information each night for release to the television industry the very next day. To comprehend the dimension of the task, consider that Nielsen Media Research collects information from more than 25,000 metered households starting about 3AM, and processes approximately 10 million viewing minutes for delivery to customers that day.

Sampling

Any system of television measurement depends upon an audience sample that is representative of viewers as a whole. A properly selected random group of households should mirror the behavior and characteristics of the population. By using random probability samples, Nielsen Media Research can project the viewing in its samples to the entire population. Nielsen Media Research’s national sample consists of 5,000 households, including approximately 11,000 persons. We use the U.S. Census Bureau’s decennial (updated annually) census counts of all housing units in the nation. Using these data, Nielsen Media Research randomly selects more than 6,000 small geographic areas (blocks in urban areas and their equivalent in rural areas) and dispatches surveyors to each area to enumerate and list housing units. Housing units are randomly selected within each sample area. Each occupied housing unit is a household. The sample is designed to give each household in the population a known chance to be selected for the Nielsen People Meter Sample. Volunteers, though plentiful, cannot be included in the sample.

In Canada, our national sample consists of 2,100 households, including about 5,500 persons. The local market samples for Toronto and Vancouver contain 500 households each, and these are included as part of the national sample. Our sampling methodology begins with Canadian census counts, but is otherwise similar to the methodology used in the United States.



Methodology

The People Meter measurement technique is the product of many years of experience with meter and diary-based audience measurement. Since the reliability of the People Meter depends on the active participation of each household member and visitor as they watch TV in our sample homes, Nielsen Media Research's Methodological Research Department conducts extensive research about people's viewing behavior, including how the People Meter is actually used. Two major advances have resulted in significant improvements in cooperation among "basic" sample households—that is, the households initially contacted by Nielsen Media Research who agree to participate in the People Meter sample, as well as the continuing commitment of the people in those households to use the People Meter correctly.

The first research initiative was the introduction of specially trained People Meter Representatives. These are recruiters who have experience in working with children and teens in order to train these younger viewers, and their families, to accurately use the People Meter.

The other research initiative was really an outgrowth of that project, and goes to the first step in the recruitment process—gaining the cooperation of the "basic" (or first choice) household randomly selected by Nielsen Media's statisticians. Using a concept called

"Membership," our recruiters encourage sample household members to participate in the famous NielsenTV ratings in order to contribute to the reliability of television viewing information. "Membership" is built around the concept of an active commitment by the respondent to provide accurate data. The successful implementation of this new recruitment strategy has resulted in the highest levels of cooperation by the viewing public since the introduction of the People Meter into nationwide audience measurement in 1987.

Ethnic Measurement

All ethnic groups are represented in Nielsen Media Research's samples in proportion to their percent of the population being measured. Target marketers require detailed and frequent information about characteristics of ethnic audiences in order to make intelligent advertising and programming decisions.

African-American Measurement

African-Americans are the largest minority segment of the U.S. television household population, comprising approximately 12 percent of the 100 million TV households. African-Americans generally watch more television than other segments of the population (approximately 75 hours a week compared to 52 hours a week in non-Black households), and their viewing behavior, in

terms of the most watched television programs, differs from the rest of the population (see, "Viewing Among African-Americans," page 40).

Hispanic Measurement

In the fall of 1992, Nielsen Media Research launched the first national Hispanic television service (Nielsen Hispanic Television Index) in the U.S. designed to report viewing to Spanish-language television, and to measure the diverse viewing habits among Hispanics living in the United States. The viewing habits of this population, in total and separately, in homes where Spanish is the only or dominant language spoken, are now reported on a national level (see "Viewing Among Hispanics," page 43). Separate samples of Hispanic households are used to collect information about local-market viewing to Spanish-language television. To date, Nielsen Media Research provides such services in sixteen local markets.

The Services of Nielsen Media Research

To be responsive to customer needs, Nielsen Media Research is organized vertically by customer segments and aligned by the different sources of data.

Nielsen Agency, Broadcaster and Syndication Service–NABSS

This service combines the marketing staffs of Nielsen Television Index (NTI), which was established in 1950, and Nielsen Syndication Service (NSS), which was established in 1985. This service provides continuous audience estimates for all national broadcast network television programs and national syndicated programs. The service also provides these data to national advertising agencies. In 1987, this service began collecting data on nationwide television viewing on a daily basis using the People Meter.

Nielsen Homevideo Index®–NHI

NHI was established in 1980 and provides a measurement of cable, pay cable, VCRs, DVD, Satellite Dish, and other new technologies. The data are collected through the use of People Meters, set-tuning meters and paper diaries. As the dynamic media environment evolves, NHI is expanding to serve the needs of new providers of information and entertainment delivered to the home television set. Included in the NHI service is measurement of interactive television systems.

Nielsen Station Index®–NSI

Established in 1954, NSI provides local market television audience measurement. This service provides continuous metered-market overnight measurement in nearly 50 major markets (see page 48), and diary measurement in all 210 Designated Market Areas (DMAs) in the U.S. NSI also plans to introduce local people meter measurement in Boston and nine additional markets to be announced depending on customer support.

New Millennium

This service is an agency buying system that provides advertising agencies with the ability to perform pre-buy analyses, track negotiations and scheduling of ad time, evaluate overall performance in terms of delivery and cost, and perform reconciliation and subsequent accounting functions. By automating tasks now done manually at agencies, the system may substantially reduce agency costs.

New Media Services®–NMS

This unit was born out of the Special Research and New Business Development groups, which were a part of Nielsen Media Research since 1980. New Media Services provides custom research and start-up services for new syndicated products, both national and local. This includes measurement performance of non-traditional research such as place-based media and out-of-home studies. Sigma is a verification service that electronically monitors and reports air plays of public

service announcements, video news releases and program promotions.

Nielsen Advertiser Services–NAS

Nielsen Advertiser Services provides advanced information solutions to help national advertisers deliver more effective campaigns and respond more quickly to competition. The service leverages proprietary data from Nielsen Media Research's national and local television ratings services and the company's existing advertising tracking and verification services. Advanced information delivery systems also are used to create special reports on customers' advertising programs and competitive activity.

Nielsen Interactive Services®

This service was created in 1995, and provides a range of research services that track the growth of the Internet as well as provides information to advertisers, content providers and on-line service companies. In 1999, "Nielsen//NetRatings" was launched from a strategic alliance with NetRatings, Inc, a leader in Internet usage and advertising measurement. This new service provides high-quality information about the Internet from a sample including more than 38,000 persons in U.S. households. Working with CommerceNet, an association of companies promoting Internet commerce, Nielsen Media Research has conducted five benchmark studies reporting on user demographics and the expanding commercial use of the Internet.



Nielsen Hispanic Television Services – NHTI and NHSI

Started in November 1992, the Hispanic Services provide comprehensive measurement services for Hispanic television viewing and Spanish-language television in the U.S. Nielsen Hispanic Television Index (NHTI) is the first electronic metered service to report Hispanic audience measurement on a national basis. NHTI uses the People Meter—the same measurement tool used to report total U.S. audience behavior—with a separate sample of 800 Hispanic households. Nielsen Hispanic Station Index (NHSI) is the local service, and uses a Spanish language stratified sample to reflect the unique characteristics of each local market. The NHSI service provides viewing information in 16 television markets with significant Hispanic population. Like its national counterpart, the NHSI service began in 1992.

Nielsen Monitor-Plus®

In addition to providing television audience estimates, Nielsen Media Research has developed a service to measure the effectiveness of media buying. Monitor-Plus links television ratings to commercial occurrence data and tracks “share of spending” and “share of voice” (the proportion of all television advertising within a product category attributable to a brand or advertiser, as expressed in rating points). Monitor-Plus enables

marketers and their agencies to track advertising activity across 15 categories of media, including television, radio, and print. Additionally, in the case of television, Monitor-Plus provides access to audience exposure. Customers can determine where media investments are being made by advertiser and brand.

Nielsen Sports Marketing Service®–NSMS

Formed in 1995, this marketing unit focuses on the special information needs of sports teams, leagues and marketers as well as stations, networks, unwired networks, and production companies. In 1998, NSMS launched SportsQuest, a new survey product aimed at providing qualitative information on sports marketing, both nationally and locally.

Nielsen Media Research Canada

The Canadian service of Nielsen Media Research provides television viewing information through one national and two local People Meter samples (Toronto/Hamilton and Vancouver/Victoria). In addition, information from the regions of Ontario and Quebec also can be reported. TV advertising spending in Canada exceeds \$1.5 billion (U.S. \$). Nielsen Media Research Canada has more than 150 customers, including broadcast networks, advertisers and their agencies, and television production houses.



GENERAL TRENDS

The number of television households in the United States continues to grow, as does the number of total persons in those households. The number of persons per TV household, however, remains steady at approximately 2.6, following a decline from 1965 through 1990.



Source: Nielsen Media Research estimates, September 1965-1970; January 1, 1980-present. TV Audience 1993: *Aged 2 and over.

One of the most significant changes in society today is the aging of the Baby Boomers. As this huge group of adults matures, their impact on television is unmistakable. The number of homes with TV has increased 87 percent from 1965 to 2000, the number of adults 18-49 has grown by 72 percent and the number of adults 50+ has also grown by 76 percent. By contrast, while other large demographic categories shown here experienced significant growth between 1965 and 1990, Children and Teens only just began to reverse a decline, and have grown only modestly over the past ten years.

TREND OF POPULATION GROWTH (IN MILLIONS)

	1965	1970	1980	1990	1995	1998	2000
TV HOUSEHOLDS	53.8	60.1	76.3	92.1	95.4	98.0	100.8
CHILDREN 2-11	39.2	38.9	31.8	35.5	38.2	39.2	39.8
TEENS 12-17	20.3	23.3	22.8	19.6	21.3	22.1	22.5
MEN 18+	54.2	58.6	72.1	85.6	89.2	92.3	94.7
WOMEN 18+	59.7	66.5	80.2	94.6	97.8	100.6	103.0
ADULTS 18-49	72.3	79.2	97.4	118.7	122.2	123.5	124.5
ADULTS 50+	41.6	45.8	54.9	61.5	64.9	69.4	73.2

Source: Nielsen Media Research estimates, September 1, 1965, 1970, January 1, 1980-2000. TV Audience 1999.

TV Ownership

The media environment has evolved over the years changing the ways Americans view television. Along with the growth of cable, there is a steady increase in the number of homes with more than one television set, a VCR and remote control. Each of these options increases flexibility and viewer control over the time spent with television.

% OF TOTAL HOUSEHOLDS IN U.S.

	1950	1960	1970	1980	1990	1995	1996	1997	1998	2000
TV HOUSEHOLDS	10	87	96	98	98	98	98	98	98	98
MULTI-SET		12	35	50	65	71	73	74	74	76
1 TV SET			65	49	35	29	27	26	26	24
2 TV SETS			29	36	41	36	36	36	34	35
3+ SETS			6	15	24	35	37	38	40	41
TOTAL CABLE			7	20	56	63	65	66	74	76
PAY CABLE					29	28	32	33	35	32*
VCR					66	79	81	82	84	85
REMOTE CONTROL					77	91	94	93	93	95

TV Households-Population estimates based on January 1, each year. Multi-Set-1955-93 January: 1994 to present based on prior July Color-January each year. VCR-Prior May each year. Remote Control-National People Meter Sample, projected to January each year. Wired Pay Cable-Nielsen Media Research Estimates—prior to May each year. Total Cable-1970-75 February-March, 1980 to present based on prior July each year. 1998 to Present Total Cable includes ADS (Alternative Delivery Systems)-May each year. *Note: Effective June 1999, definition of Pay Cable was changed to exclude Disney and Four Foreign language networks.

Hours of TV Household Usage

One of the most basic measures of television viewing is the number of hours per day the television set is in use. Overall television usage has remained fairly constant over the past five years. Seasonal differences are evident with increased viewing in the winter months and lower figures during the summer.

AVERAGE DAILY USAGE
HOURS: MINUTES

	Annual	February	July
1981-82	6:48	7:22	6:09
1982-83	6:55	7:33	6:23
1983-84	7:08	7:38	6:26
1984-85	7:07	7:49	6:34
1985-86	7:10	7:48	6:37
1986-87	7:05	7:35	6:32
1987-88	6:59	7:38	6:31
1988-89	7:02	7:32	6:27
1989-90	6:55	7:16	6:24
1990-91	6:56	7:36	6:26
1991-92	7:04	7:32	6:39
1992-93	7:12	7:41	6:47
1993-94	7:16	7:51	6:53
1994-95	7:15	7:42	6:45
1995-96	7:17	7:38	6:59
1996-97	7:12	7:28	6:49
1997-98	7:15	7:41	6:50
1998-99	7:24	7:39	7:08

Source: Nielsen Media Research annual estimates 1981-1992, are based on total U.S. households, September-August (48 week average excluding unusual days) From 1992-93 and on, dates are mid-September to mid-September February and July data are based on the National Audience Demographic reports for each year 1981-1987 data based on NTI Audimeter/Diary 1987-present based on Nielsen People Meter.

Weekly Viewing by Daypart

Primetime continues to attract the most viewing activity. It is the daypart in which all segments of the audience (demographics) spend the most time viewing. Other dayparts reveal some clear differences by age group. For example, Women 55+ spend the most time watching daytime television, and Men 55+ spend slightly more time watching daytime television than do Women 25-54. Sunday afternoon, traditionally seen as a prime sports daypart, attracts just as much viewing by Women 55+ as by Men 25-54. While Children watch more Saturday morning television, they also account for the fewest hours of primetime viewing.

OCTOBER 1999-HOURS: MINUTES VIEWED PER WEEK

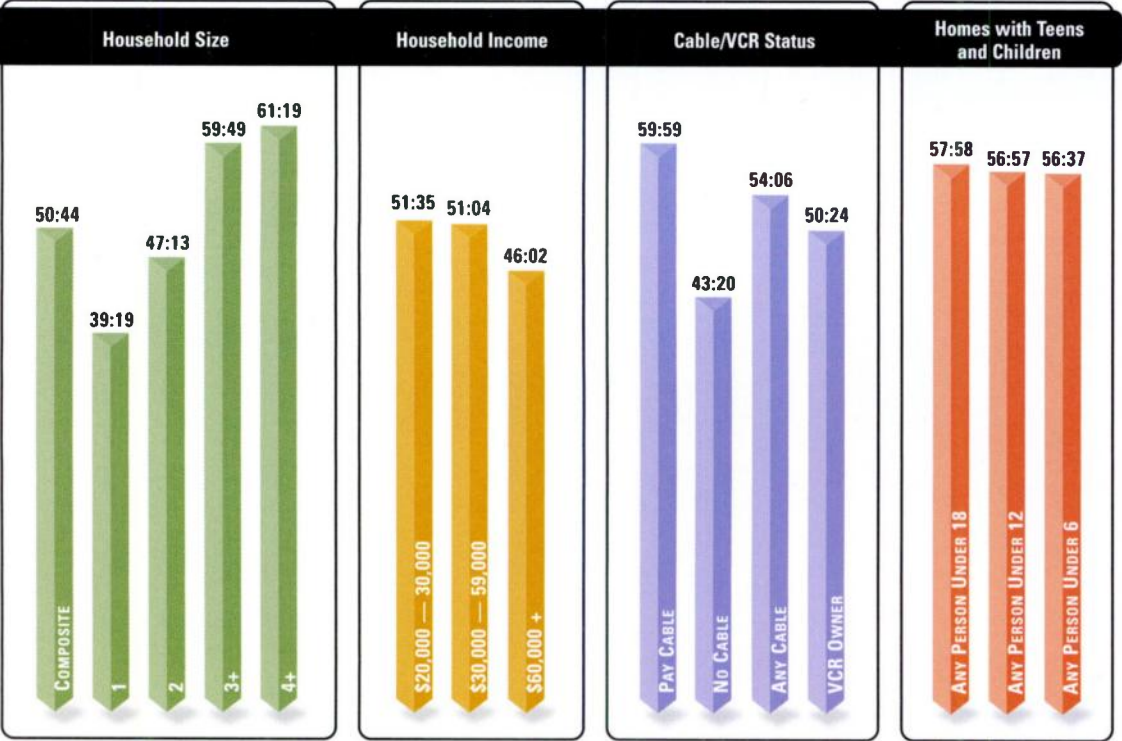
	Total Day	Early Morning M-F 7-10am	Daytime M-F 10am-4pm	Primetime M-Sat 8-11pm & Sunday 7-11pm	Late Night M-F 11:30pm-1am	Saturday 7am-1pm	Sunday 1-7pm
TOTAL PERSONS	28:13	1:40	3:38	8:11	1:17	:48	1:34
WOMEN 18+	32:46	2:07	4:53	9:22	1:31	:47	1:33
WOMEN 18-24	21:30	1:02	3:31	5:25	1:13	:34	1:04
WOMEN 25-54	30:35	2:01	4:03	8:56	1:32	:46	1:29
WOMEN 55+	41:20	2:43	6:59	11:42	1:35	:52	1:52
WORKING WOMEN	27:43	1:32	2:44	8:40	1:26	:45	1:29
MEN 18+	28:54	1:23	3:07	8:52	1:30	:42	1:52
MEN 18-24	20:10	:50	2:29	5:06	1:18	:27	1:09
MEN 25-54	27:33	1:13	2:33	8:37	1:32	:43	1:52
MEN 55+	36:28	2:04	4:44	11:17	1:31	:47	2:14
TEENS 12-17	19:40	:40	1:32	5:59	:50	:46	1:13
CHILDREN 2-11	19:40	1:46	2:49	4:45	:24	1:10	1:01

Source: National Audience Demographic Report October 1999. Note: October 1999 has been used as an illustrative month to provide a basis of typical viewing. Total Day = Mon-Sun 24 Hours. All times are Eastern Time.

Weekly Viewing by Household Characteristics

Household viewing differs according to various Household characteristics. For example, people who subscribe to premium services—including those receiving them via satellite—spend more time watching television than any other category of viewers, more than 15 hours a week more compared to homes with no cable or ADS (Alternate Delivery Systems). Similarly, larger families tend to watch more television, and persons in higher-income homes watch less television.

WEEKLY TUNING BY HOUSEHOLD CHARACTERISTICS—HOURS:MINUTES
MONDAY–SUNDAY 24 HOUR TOTAL, SEPTEMBER 1999



Source: Galaxy Explorer, September 1999. Note: September 1999 has been used as an illustrative month to provide a basis of typical viewing. Cable data includes Alternate Delivery Systems (ADS).

Primetime Viewing by Day of Week

Sunday is the most viewed night of the week, but not among all demographic categories. More Children watch television on Friday nights than on Sunday night. Conversely, fewer Men and Women watch television on Friday and Saturday nights. Generally speaking, there are more Women in the audience than Men.

OCTOBER 1999 (IN MILLIONS)

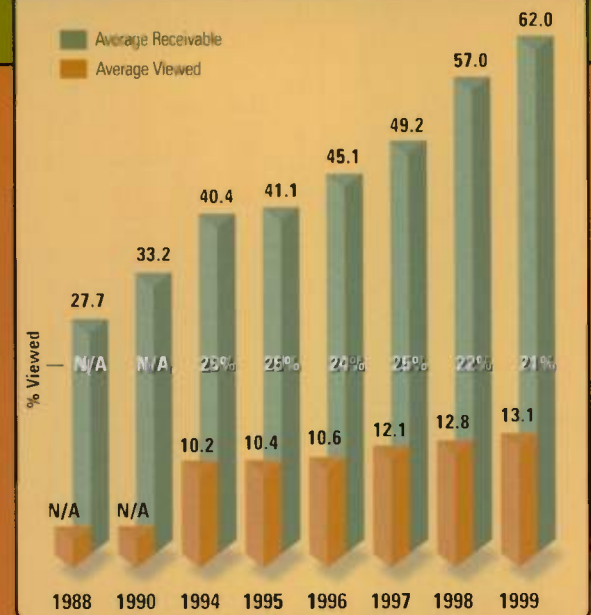
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
TOTAL PERSONS	102.69	98.70	95.91	97.97	86.33	88.68	104.20
WOMEN 18+	46.60	45.70	44.18	45.28	39.11	39.10	46.15
MEN 18+	40.57	38.90	37.76	37.70	32.79	35.39	42.65
TEENS 12-17	7.09	6.29	6.32	6.41	4.77	5.30	6.42
CHILDREN 2-11	8.43	7.81	7.66	8.58	9.66	8.89	8.98

Source: National Audience Demographic Report October 1999. Note: October 1999 has been used as an illustrative month to provide a basis of typical viewing. Total Day = Mon-Sun 24 Hours. All times are Eastern Time. Primetime = Mon-Sat 8-11pm, Sun 7-11pm.

VIEWING ALTERNATIVES

While the number of channels available in the TV home continues to grow, the number of channels actually viewed seems to have plateaued between 10 and 13. The term “viewed” is defined as 10 or more continuous minutes per channel.

CHANNELS RECEIVABLE VS. VIEWED
ALL CHANNELS



Source: National People Meter Sample. Estimates based on last week in August each year.

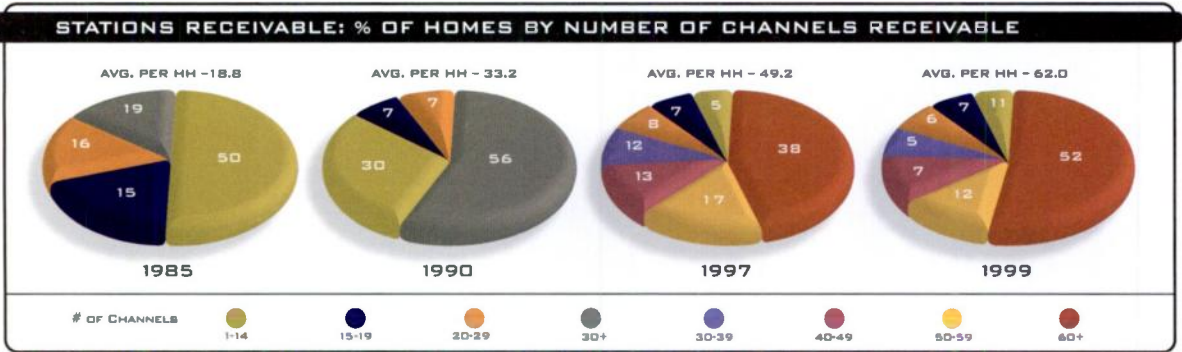
Sources of Viewing

Television viewing is affected by many factors, including the number of viewing sources available. In 1970, Nielsen Media Research reported that just over four million households, or 7 percent of all TV homes, had cable television. That figure has increased to 74 percent (including via satellite). This expanded viewing menu has produced changes in audience choices over the years, as reflected in the chart at right. Cable television's primetime share of the audience, for instance, has grown from 6 percent in 1985 to 41 percent in 1999.

There are some differences within this share-of-viewing category by daypart, as this chart illustrates. Shares can be greater than 100 percent, since homes can contribute to more than one category.

Stations Receivable

The growth of cable and the expansion of channels continue to increase the viewing options in the average TV household. In 1998, the average TV home was able to receive 57 channels, while 45 percent of TV homes received 60 or more channels.



Source: NTL Audimeter sample 1985, September each year. National People Meter sample: September 1990 to present. Note: WB, UPN and PAX included as of 1999.

PRIMETIME SHARE OF AUDIENCE BY VIEWING SOURCES
(PRIMETIME MON-SUN 8-11PM SEPTEMBER-AUGUST)

	Net Affiliates		Independent		Public		Pay Cable		Basic Cable	
	Rating	Share	Rating	Share	Rating	Share	Rating	Share	Rating	Share
1984-85	44.8	74	9.7	16	2.6	4	4.0	7	3.6	6
1985-86	45.1	75	10.1	17	2.5	4	3.4	6	3.9	6
1986-87	43.3	73	10.5	18	2.7	4	3.3	6	4.7	8
1987-88	40.1	69	11.5	20	2.5	4	3.8	7	6.0	10
1988-89	38.7	66	11.7	20	2.4	4	3.9	7	7.5	13
1989-90	36.5	63	11.9	21	2.2	4	3.6	6	9.0	16
1990-91*	38.4	67	7.8	14	2.3	4	3.4	6	11.6	20
1991-92	41.8	71	5.5	9	2.1	4	3.1	5	12.8	22
1992-93	40.8	70	5.7	10	2.3	4	3.0	5	13.6	23
1993-94	41.1	69	6.2	10	2.3	4	3.0	5	14.2	24
1994-95	38.5	66	6.5	11	2.2	4	3.2	5	15.9	27
1995-96	36.3	62	6.7	11	2.1	4	3.3	6	18.0	31
1996-97	33.7	58	6.8	12	2.2	4	3.8	6	19.8	34
1997-98	32.0	55	6.8	12	2.0	4	3.9	7	22.4	38
1998-99**	31.7	54	6.5	11	1.9	3	4.2	7	24.3	41

Network Affiliates: ABC, CBS, NBC and FOX affiliates. Independent: Commercial independent stations including WB and UPN and PAX affiliates and superstations except for TBS. Public: PBS affiliates. Pay Cable: Cable Subscribers receiving at least one premium channel. This does not include Pay-Per-View. Basic Cable: Tuning to basic cable including TBS and Pay-Per-View. *Effective 1991, FOX and TBS changed from Independents to Network Affiliate and Basic Cable respectively. ** The 98-99 season data is from Sept-June. Effective July 99, the sources of viewing categories were completely revised.



Broadcast Network Programs

7 Network Primetime Averages from 1952-99

When Nielsen Media Research began measuring television audiences and usage, there were few viewing alternatives in the average home. Broadcast networks dominated the primetime landscape, while their affiliated stations provided the local news, entertainment and information which filled out the broadcast day. This partnership of local and national programming helped build the medium. Three networks, ABC, CBS, and NBC, captured virtually all viewing during the first decades of television ratings. ABC, the third of the networks to launch, built its affiliate line-up and benefited from strong special programs, including Olympics and mini-series, to finally reach parity in the 1970s. During the 1980s increasing cable penetration began to change prime time viewing. During the 1990s four new broadcast networks joined the scene further altering the primetime television landscape.

PRIMETIME NETWORK RATINGS (SEPTEMBER-MAY)

	ABC	CBS	NBC	FOX	UPN	WB	PAX
1952-1953	16.6	28.1	30.1	-	-	-	-
1952-1953	11.8	25.5	28.1	-	-	-	-
1954-1955	13.2	24.3	24.8	-	-	-	-
1955-1956	14.5	25.5	22.5	-	-	-	-
1956-1956	14.0	25.6	20.1	-	-	-	-
1957-1958	16.8	23.5	21.6	-	-	-	-
1958-1959	17.7	23.0	20.3	-	-	-	-
1959-1960	17.6	21.0	18.1	-	-	-	-
1960-1961	18.4	20.7	18.1	-	-	-	-
1961-1962	16.7	19.5	19.4	-	-	-	-
1962-1963	15.6	21.4	18.2	-	-	-	-
1963-1964	16.9	21.2	18.0	-	-	-	-
1964-1965	19.2	19.6	19.5	-	-	-	-
1965-1966	17.7	20.0	19.2	-	-	-	-
1966-1967	17.1	19.6	19.3	-	-	-	-
1967-1968	16.7	20.6	19.0	-	-	-	-

	ABC	CBS	NBC	FOX	UPN	WB	PAX
1968-1969	15.6	20.3	20.0	-	-	-	-
1969-1970	16.4	20.0	19.9	-	-	-	-
1970-1971	17.4	19.4	19.5	-	-	-	-
1971-1972	18.2	20.2	19.3	-	-	-	-
1972-1973	17.4	19.9	19.1	-	-	-	-
1973-1974	17.7	21.1	18.7	-	-	-	-
1974-1975	16.6	20.9	19.8	-	-	-	-
1975-1976	19.0	19.6	17.7	-	-	-	-
1976-1977	21.6	18.7	18.2	-	-	-	-
1977-1978	20.7	18.8	18.1	-	-	-	-
1978-1979	21.0	18.6	17.1	-	-	-	-
1979-1980	19.5	19.6	17.4	-	-	-	-
1980-1981	18.2	19.8	16.6	-	-	-	-
1981-1982	18.1	19.0	15.2	-	-	-	-
1982-1983	17.7	18.2	15.1	-	-	-	-
1983-1984	17.2	18.0	14.9	-	-	-	-

	ABC	CBS	NBC	FOX	UPN	WB	PAX
1984-1985	15.4	16.9	16.2	-	-	-	-
1985-1986	14.9	16.7	17.5	-	-	-	-
1986-1987	14.1	15.8	17.8	-	-	-	-
1987-1988	13.7	13.4	16.0	-	-	-	-
1988-1989	12.9	12.5	15.9	-	-	-	-
1989-1990	12.9	12.2	14.6	-	-	-	-
1990-1991	12.5	12.3	12.7	6.4	-	-	-
1991-1992	12.2	13.8	12.3	8.0	-	-	-
1992-1993	12.4	13.3	11.0	7.7	-	-	-
1993-1994	12.4	14.0	11.0	7.2	-	-	-
1994-1995*	12.0	11.1	11.5	7.7	3.4	1.9	-
1995-1996**	10.6	9.6	11.7	7.3	3.1	2.4	-
1996-1997	9.2	9.6	10.5	7.7	3.2	2.6	-
1997-1998	8.4	9.6	10.2	7.1	2.8	3.1	-
1998-1999	8.1	9.0	8.9	7.0	2.0	3.2	0.7

*UPN and WB are rated as of Jan 9, 1995 **Each season prior to 1995-96 was from September to April

Historical Rankings

Nielsen Media Research has been tracking television usage in the United States since 1950. Through those years, broadcast network primetime programs have generated the lion's share of the audience. For historical purposes, we rank these programs in terms of household ratings, reflecting the competitive strength of a particular program during its era when measured against the TV population at that time. The chart on this page shows that *All in the Family* holds the crown for most seasons (5) as the highest rated series. *I Love Lucy*, *Gunsmoke* and *The Cosby Show* have each topped the chart for 4 seasons. ABC did not have a number one series until 1970-71 with *Marcus Welby, MD*. This chart illustrates the cyclical nature of viewing choices. The earliest top rated programs were Variety Shows. Following *I Love Lucy's* reign, a Quiz Show and then Westerns ruled. Medical Dramas, News and Soap Operas also took their turns in the 1970s and 80s.



TOP RANKED REGULAR PROGRAM SERIES BASED ON HOUSEHOLD RATINGS

Year	Program	Network	Household Rating	Share
1950-51	TEXACO STAR THEATRE	NBC	61.6	81
1951-52	ARTHUR GODFREY'S TALENT SCOUTS	CBS	53.8	78
1952-53	I LOVE LUCY	CBS	67.3	68
1953-54	I LOVE LUCY	CBS	58.8	67
1954-55	I LOVE LUCY	CBS	49.3	66
1955-56	\$64,000 QUESTION	CBS	47.5	65
1956-57	I LOVE LUCY	CBS	43.7	58
1957-58	GUNSMOKE	CBS	43.1	51
1958-59	GUNSMOKE	CBS	39.6	60
1959-60	GUNSMOKE	CBS	40.3	65
1960-61	GUNSMOKE	CBS	37.3	62
1961-62	WAGON TRAIN	NBC	32.1	53
1962-63	BEVERLY HILLBILLIES	CBS	36.0	54
1963-64	BEVERLY HILLBILLIES	CBS	39.1	58
1964-65	BONANZA	NBC	36.3	54
1965-66	BONANZA	NBC	31.8	48

Year	Program	Network	Household Rating	Share
1966-67	BONANZA	NBC	29.1	45
1967-68	ANDY GRIFFITH	CBS	27.6	42
1968-69	LAUGH-IN	NBC	31.8	45
1969-70	LAUGH-IN	NBC	26.3	39
1970-71	MARCUS WELBY, MD	ABC	29.6	52
1971-72	ALL IN THE FAMILY	CBS	34.0	54
1972-73	ALL IN THE FAMILY	CBS	33.3	53
1973-74	ALL IN THE FAMILY	CBS	31.2	51
1974-75	ALL IN THE FAMILY	CBS	30.2	51
1975-76	ALL IN THE FAMILY	CBS	30.1	44
1976-77	HAPPY DAYS	ABC	31.5	47
1977-78	LAVERNE & SHIRLEY	ABC	31.6	49
1978-79	LAVERNE & SHIRLEY	ABC	30.5	48
1979-80	60 MINUTES	CBS	28.2	32
1980-81	DALLAS	CBS	31.2	52
1981-82	DALLAS	CBS	28.4	45
1982-83	60 MINUTES	CBS	25.5	40

Year	Program	Network	Household Rating	Share
1983-84	DALLAS	CBS	25.7	40
1984-85	DYNASTY	ABC	25.0	37
1985-86	THE COSBY SHOW	NBC	33.8	51
1986-87	THE COSBY SHOW	NBC	34.9	53
1987-88	THE COSBY SHOW	NBC	27.8	44
1988-89	THE COSBY SHOW	NBC	25.5	41
1989-90	ROSEANNE	ABC	23.4	35
1990-91	CHEERS	NBC	21.6	34
1991-92	60 MINUTES	CBS	21.7	36
1992-93	60 MINUTES	CBS	21.6	35
1993-94	HOME IMPROVEMENT	ABC	21.9	33
1994-95	SEINFELD	NBC	20.4	31
1995-96	E.R.	NBC	22.0	36
1996-97	E.R.	NBC	21.2	35
1997-98	SEINFELD	NBC	22.0	33
1998-99	E.R.	NBC	17.8	29

* Starting with 1995-1996, broadcast season runs until mid-May. Source: Nielsen Media Research Note. 1950-1960 data based on Program Station Area basis, 1960-1987 based on NTI Audimeter; 1987 to Present based on Nielsen People Meter, Ranking Plus and Galaxy Explorer

Broadcast Networks Highest Rated Individual Broadcasts

In the earliest days of television there were not enough local stations to provide each network equal coverage of the entire country. During the 1950s national television ratings were expressed as coverage area ratings, measuring each network's programs only against the universe of homes in which the network was available, much as cable networks do today. By 1960 this changed and from that time forward all broadcast network ratings have been expressed as a percent of all U.S. homes with television. This makes ratings comparisons prior to 1960 difficult, in essence an apples to oranges situation. Thus, the chart on this page, which ranks the highest rated individual telecasts on network television, begins in 1960 when all network ratings were based on the same universe. The finale of *M*A*S*H* tops this chart with a 60.2 rating and 77 share of the time period's audience. *Dallas'* Who Shot JR? episode ranks #2, and the final episode of the *Roots* mini-series holds the #3 spot.

Most recent season's top 10 list:

E.R. has topped the ratings charts for 3 of the past 5 seasons. *Seinfeld* earned top honors in 1997-98, boosted by the strength of the series' finale which ranks #64 on the list of highest rated telecasts.

TOP 10 SERIES 1998-99 BROADCAST SEASON

Rank	Program	Network	Household Rating	Share	Average Number of Households
1	E.R.	NBC	17.8	29	17,660,000
2	FRIENDS	NBC	15.7	26	15,650,000
3	FRASIER	NBC	15.6	24	15,520,000
4	NFL MONDAY NIGHT FOOTBALL	ABC	13.9	22	13,850,000
5	JESSE	NBC	13.7	22	13,610,000
5	VERONICA'S CLOSET	NBC	13.7	21	13,630,000
7	60 MINUTES	CBS	13.2	22	13,100,000
8	TOUCHED BY AN ANGEL	CBS	13.1	20	12,990,000
9	CBS SUNDAY MOVIE	CBS	12.1	19	12,010,000
10	20/20-WED.	ABC	11.2	19	11,090,000

Source: NTL, based on a strict prime daypart (Mon-Sat 8pm-11pm, Sun 7pm-11pm ET). 9/21/98-5/26/99

TOP 25 TELECASTS 1960 TO DATE

Rank	Program	Network	Date	Household Rating	Share	Average Number of Households
1	M*A*S*H SPECIAL	CBS	2/28/83	60.2	77	50,150,000
2	DALLAS	CBS	11/21/80	53.3	76	41,470,000
3	ROOTS, PT. VIII	ABC	1/30/77	51.1	71	36,380,000
4	SUPER BOWL XVI GAME	CBS	1/24/82	49.1	73	40,020,000
5	SUPER BOWL XVII GAME	NBC	1/30/83	48.6	69	40,480,000
6	XVII WINTER OLYMPICS	CBS	2/23/94	48.5	64	45,690,000
7	SUPER BOWL XX GAME	NBC	1/26/86	48.3	70	41,490,000
8	GONE WITH THE WIND, PT. 1	NBC	11/7/76	47.7	65	33,960,000
9	GONE WITH THE WIND, PT. 2	NBC	11/8/76	47.4	64	33,750,000
10	SUPER BOWL XII GAME	CBS	1/15/78	47.2	67	34,410,000
11	SUPER BOWL XIII GAME	NBC	1/21/79	47.1	74	35,090,000
12	BOB HOPE CHRISTMAS SHOW	NBC	1/15/70	46.6	64	27,260,000
13	SUPER BOWL XVIII GAME	CBS	1/22/84	46.4	71	38,880,000
13	SUPER BOWL XIX GAME	ABC	1/20/85	46.4	63	39,390,000
15	SUPER BOWL XIV GAME	CBS	1/20/80	46.3	67	35,330,000
16	SUPER BOWL XXX GAME	NBC	1/28/96	46.0	68	44,150,000
16	ABC SUNDAY NIGHT MOVIE- THE DAY AFTER	ABC	11/20/83	46.0	62	38,550,000
18	ROOTS PT. VI	ABC	1/28/77	45.9	66	32,680,000
18	THE FUGITIVE	ABC	8/29/67	45.9	72	25,700,000
20	SUPER BOWL XXI GAME	CBS	1/25/87	45.8	66	40,030,000
21	ROOTS PT. V	ABC	1/27/77	45.7	71	32,540,000
22	SUPER BOWL XXVIII GAME	NBC	1/30/94	45.5	66	42,860,000
22	CHEERS	NBC	5/20/93	45.5	64	42,360,000
24	ED SULLIVAN	CBS	2/9/64	45.3	60	23,240,000
25	SUPER BOWL XXVII GAME	NBC	1/31/93	45.1	66	41,990,000

Source: AA% rankings based on NTL Pocketpiece Reports. Above data represent sponsored programs, telecast on individual networks. Programs under 30 minutes excluded.

Early Evening News on the Broadcast Networks

Ever since NBC teamed Chet Huntley with David Brinkley, the people reporting the news have been an integral part of each network's early evening newscast. During the past two decades each network has held the top spot in audience delivery. Beginning in 1980, CBS held the first place until the 1988-89 season. ABC took over the number one position holding fairly steady ratings for over 10 years. For the 1997-98 season, NBC took over as leader for the first time in the past 20 years. In recent years less than one rating point separates the three broadcast networks' newscasts.

Cable News Networks

The round-the-clock, all-news cable networks have helped define current news culture since they first appeared on U.S. TV screens. The Persian Gulf War in 1991 brought new attention and viewers to cable news. All-news networks have given television viewers more in-depth coverage of major news events and breaking stories than ever before. This table shows the averages for the cable news networks throughout their telecast day over the last few years. Coverage Area Ratings express audience as a percent of those homes in which the cable network is available.

MONDAY-FRIDAY 6:30PM-7:00PM

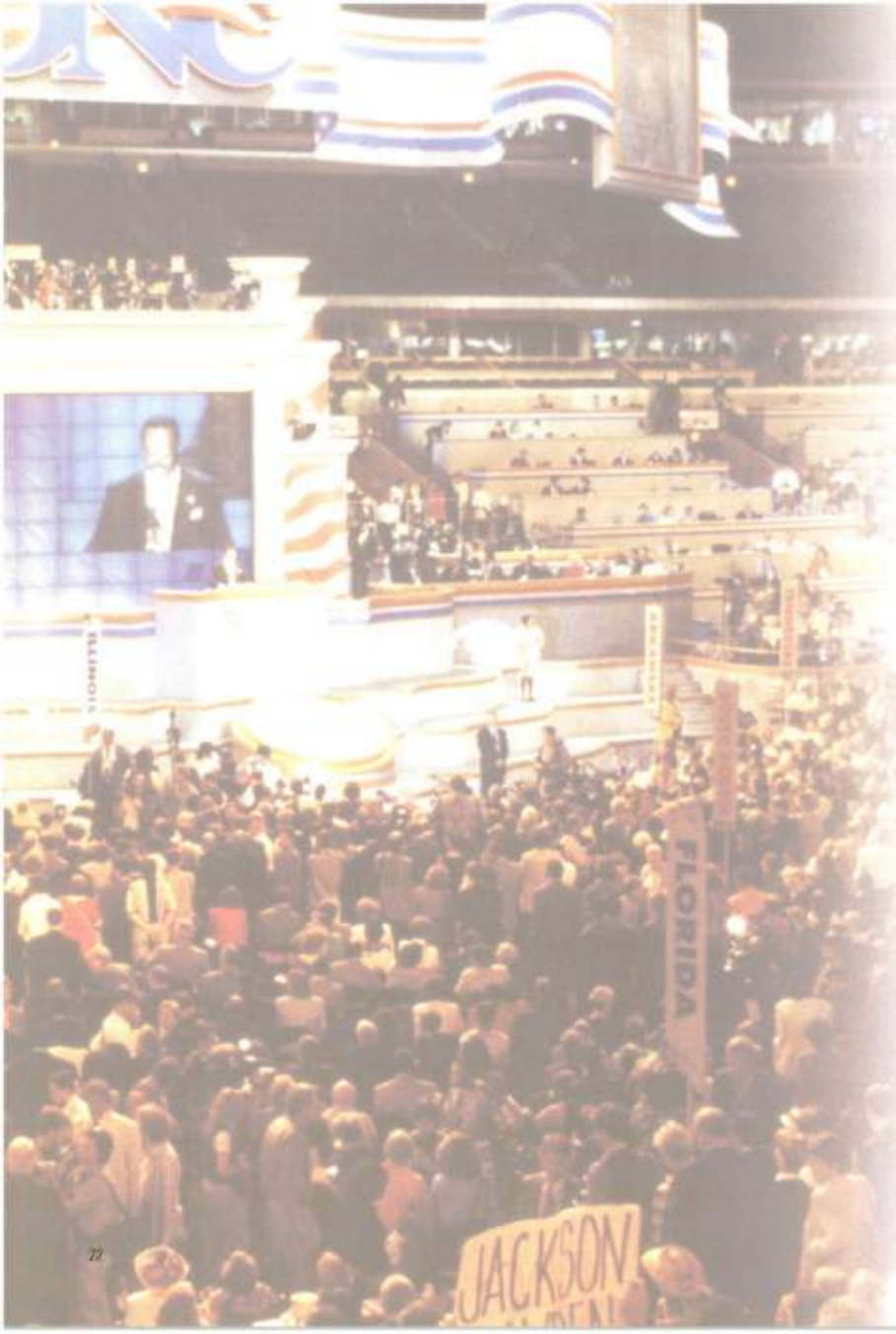
Season	ABC Household		CBS Household		NBC Household	
	Rating	Share	Rating	Share	Rating	Share
1980 - 1981	11.8	23	13.6	26	11.9	23
1981 - 1982	11.7	23	12.9	24	11.5	22
1982 - 1983	10.8	21	13.2	25	10.7	20
1983 - 1984	10.3	20	12.5	24	10.2	19
1984 - 1985	10.4	20	12.5	24	10.5	20
1985 - 1986	10.8	21	12.1	23	11.3	22
1986 - 1987	10.1	19	10.7	21	10.6	21
1987 - 1988	10.1	20	10.5	21	9.6	19
1988 - 1989	10.1	20	10.2	20	9.5	19
1989 - 1990	10.3	21	9.4	19	9.0	19
1990 - 1991	10.4	21	8.9	18	8.9	18
1991 - 1992	10.0	20	9.0	18	8.5	17
1992 - 1993	10.5	21	9.1	18	8.8	18
1993 - 1994	10.2	21	9.0	18	9.1	18
1994 - 1995	9.6	19	7.9	16	8.0	16
1995 - 1996	8.9	18	7.2	15	8.1	17
1996 - 1997	8.2	17	7.0	15	8.2	17
1997 - 1998	7.7	16	7.5	16	8.1	17
1998 - 1999	7.6	16	6.9	15	7.8	16

Source: September-August average for each season (48 weeks). 1980-81 to 1986-87: Household Tracking Report (4th Qtr-3rd Qtr for each season). 1987-88 to 1998-99: Ranking Plus. 1998-99: Galaxy Explorer.

MONDAY-SUNDAY 24 HOUR AVERAGE FOR THE CABLE NEWS NETWORKS

Season	CNN		CNBC		Headline News		MSNBC		Fox News Channel	
	Total U.S. Rating	Coverage Area Rating	Total U.S. Rating	Coverage Area Rating	Total U.S. Rating	Coverage Area Rating	Total U.S. Rating	Coverage Area Rating	Total U.S. Rating	Coverage Area Rating
1996 - 1997	0.3	0.5	0.2	0.2	0.2	0.3	N/A	N/A	N/A	N/A
1997 - 1998	0.4	0.5	0.2	0.4	0.2	0.2	0.1	0.3	<<	0.1
1998 - 1999	0.4	0.6	0.3	0.4	0.2	0.2	0.2	0.3	0.1	0.2

Note: September-August average for each season; N/A means not available. MSNBC and FOX News Channel measurement began during 1997, so their first complete season is 1997-1998, << means average was less than 0.1. Source: Galaxy Explorer.



Political TV Coverage

Televised coverage of political campaigns has probably influenced politics just as much as political campaigns have impacted the medium itself. Television has brought the process to the people in ways the Founding Fathers almost certainly never imagined. Network news organizations have an opportunity to showcase their capabilities while viewers—voters—have the chance to hear candidates' views. Political advertising has also become an increasingly important factor in media revenue.

By 1980, with increasing competition, the three commercial broadcast networks had cut back the amount of political coverage, while PBS joined in covering these events. By the late 1980s, CNN and C-Span were also providing extensive coverage of the presidential campaigns, primaries, conventions, debates and elections. In the mid-1990s, both MSNBC and Fox News Channel joined in political coverage.

Democratic and Republican Conventions

Presidential nominating conventions are held in July and August with the party holding the Presidency scheduling its convention last. Changes in the parties' primary system have impacted the conventions in recent campaigns. Approximately 16 million households tuned in to the 1996 Democratic and Republican conventions on one of the networks (ABC, CBS, NBC, CNN, and PBS).

Year				Democratic Convention Total Rating	Democratic Convention Total Homes	Republican Convention Total Rating	Republican Convention Total Homes
1960	3-NETWORK TOTAL	ABC, CBS, NBC		29.2	13,216,000	28.0	12,596,000
1964	3-NETWORK TOTAL	ABC, CBS, NBC		28.8	14,695,000	21.8	11,130,000
1968	3-NETWORK TOTAL	ABC, CBS, NBC		28.5	16,200,000	26.4	15,000,000
1972	3-NETWORK TOTAL	ABC, CBS, NBC		18.3	11,400,000	23.4	14,400,000
1976	3-NETWORK TOTAL	ABC, CBS, NBC		25.2	17,400,000	31.5	21,900,000
1980	3-NETWORK TOTAL	ABC, CBS, NBC		27.0	20,700,000	21.6	16,500,000
1984	3-NETWORK TOTAL	ABC, CBS, NBC		23.4	19,500,000	19.2	16,200,000
1988	3-NETWORK TOTAL	ABC, CBS, NBC		19.8	17,400,000	18.3	16,200,000
1992	5-NETWORK TOTAL	ABC, CBS, NBC, CNN, PBS		22.0	20,500,000	20.5	20,000,000
1996	5-NETWORK TOTAL	ABC, CBS, NBC, CNN, PBS		17.2	16,418,000	16.5*	15,796,000*

Source: Nielsen Tunes into Politics 1992. Note: 1976 and 1980 data based on primetime coverage only (7:30pm-11pm). 1996 data based on closest comparable time period on all 5 networks. *The Family Channel aired the Republican Convention and is also included in the Total Rating and Total Homes.

Presidential Debates

Televised debates have affected the course of U.S. politics, probably more than once, as the cold eye of the TV camera focuses on the candidate's persona. The candidate's appearance and mannerisms rival the content of the message.

As the table below illustrates, the Kennedy-Nixon showdown on October 13, 1960 remains the highest rated debate to date, although there were fewer television households in the nation at that time.

Election Night

Television viewing on Election Night has changed dramatically over the years, especially considering the number of different channels available in the average home. In the 60's most homes in the U.S. only had a few channels available to them, so the Election Night returns captured virtually all the audience. Now with more than 40 channels available to the average home, viewing levels for political coverage has gone down. Technology has also changed the dynamic of election coverage. Broadcasters shift between national and local coverage and exit polls enable news organizations to project winners, in many cases as soon as the polls close.

PRESIDENTIAL DEBATES

Year	Networks	Candidates	Date	Total Rating	Total Homes (in millions)	Total Persons (in millions)
1960	ABC, CBS, NBC	KENNEDY-NIXON	Sept. 26	59.5	28.1	N/A
			Oct. 7	59.1	27.9	N/A
			Oct. 13	61.0	28.8	N/A
			Oct. 21	57.8	27.3	N/A
1964			NO DEBATES			
1968			NO DEBATES			
1972			NO DEBATES			
1976	ABC, CBS, NBC	CARTER-FORD	Sept. 23	53.5	38.0	69.7
			Oct. 6	52.4	37.3	63.9
			Oct. 22	47.8	34.0	62.7
1980	ABC, CBS, NBC	REAGAN-CARTER-ANDERSON	Oct. 28	58.9	45.8	80.6
1984	ABC, CBS, NBC	REAGAN-MONDALE	Oct. 7	45.3	38.5	65.1
			Oct. 21	46.0	39.1	67.3
1988	ABC, CBS, NBC	BUSH-DUKAKIS	Sept. 25	36.8	33.3	65.1
			Oct. 13	35.9	32.5	67.3
1992	ABC, CBS, NBC, CNN	CLINTON-BUSH-PEROT	Oct. 11*	38.3	35.7	62.4
			Oct. 15	46.3	43.1	69.9
			Oct. 19	45.2	42.1	66.9
1996	ABC, CBS, NBC, CNN, FOX	CLINTON-DOLE	Oct. 6	31.6	30.6	46.1
			Oct. 16**	26.1	25.3	36.3

Source: Nielsen Tunes into Politics 1992. *Does not include CBS. **October 16, 1996 does not include FOX.

ELECTION NIGHT

Year	Networks	Total Rating	Total Share	Total Households	Viewing Alternatives in the Average Home
1960	ABC, CBS, NBC	65.7	90	29,796,000	N/A
1964	ABC, CBS, NBC	55.7	87	29,311,250	N/A
1968	ABC, CBS, NBC	58.5	86	34,076,000	N/A
1972	ABC, CBS, NBC	45.4	70	29,419,000	N/A
1976	ABC, CBS, NBC	51.6	74	36,739,000	N/A
1980	ABC, CBS, NBC	46.4	67	37,074,000	N/A
1984	ABC, CBS, NBC	35.9	54	30,479,000	17.2
1988	ABC, CBS, NBC	25.9	46	23,414,000	25.1
1992	ABC, CBS, NBC	39.8	57	36,900,000	37.9
1996	ABC, CBS, NBC, CNN	25.8	42	24,940,000	45.1

Source: Nielsen Tunes into Politics 1992, NTI Television Audience, 1960 and 1964 NTI Pocketpieces

SYNDICATION

In 1985, Nielsen Syndication Service (NSS) began reporting national audience estimates for selected syndicated programs. These are programs which are distributed to local television stations with national commercials already inserted. Stations also sell local commercial inventory within these national syndication programs.

This type of program distribution is called barter syndication. Stations either pay for the licensing fee by splitting the available commercial time (pure barter), or by splitting commercial time and paying a cash fee (cash plus barter). Basically, there are two types of programs that are syndicated:

- Off network shows
- First run, made for syndication programs

NSS plays a major role in the barter syndication process by supplying the audience measurement and research tools needed to perform two important syndicator functions: National Ad Sales and Local Station Sales.

National Ad Sales:

Nielsen Media Research's program audience estimates are used by syndicators and advertising agencies during the ad sales process which includes commercial negotiation and performance of "post analyses" (audience delivery documentation). In order to prepare for the negotiation, NSS data are used by buyers and sellers to estimate future program performance. Part of the ad sales strategy could include promoting, publicizing and competitive analysis. Obviously, NSS data play a key role in these three areas as well.

Research Tools Available for National Audience Analysis

Galaxy Explorer	National Custom Analysis
Galaxy Lightening	NSS Persons Tracking Report
Personal NAD Facility	NSS Pocket Piece Report
Client Cume System	NSS Share Report
NPOWER	Quad Analysis

Local Station Sales:

Nielsen Media Research's local market program estimates are used by syndicators and stations during the program sales process. Similar to the national program data, local market data are used for negotiations. The syndicators (or distributors) try to license their programs to as many local stations as possible with the goal of covering the entire U.S. Both sides analyze and estimate their broadcast schedule options using local data. Nielsen Media Research's local data also play a key role in program promotion and publicity activities as well as in competitive performance analysis.

Research Tools Available for Local Audience Analysis

<i>Metered Market Sample</i> (Household data)	<i>Diary Sample</i> (HH & demographic data)
Galaxy Navigator software	Galaxy ProFile software
Local Custom Analysis	Cassandra Report
	Viewers In Profile Report (ViP)
	Local Custom Analysis
	ROSP Report

Syndicators also produce programming for network, cable and Pay Per View events.

Top 10 Syndicated Programs

The National People Meter Service measures syndicated program performance on a total U.S. basis.

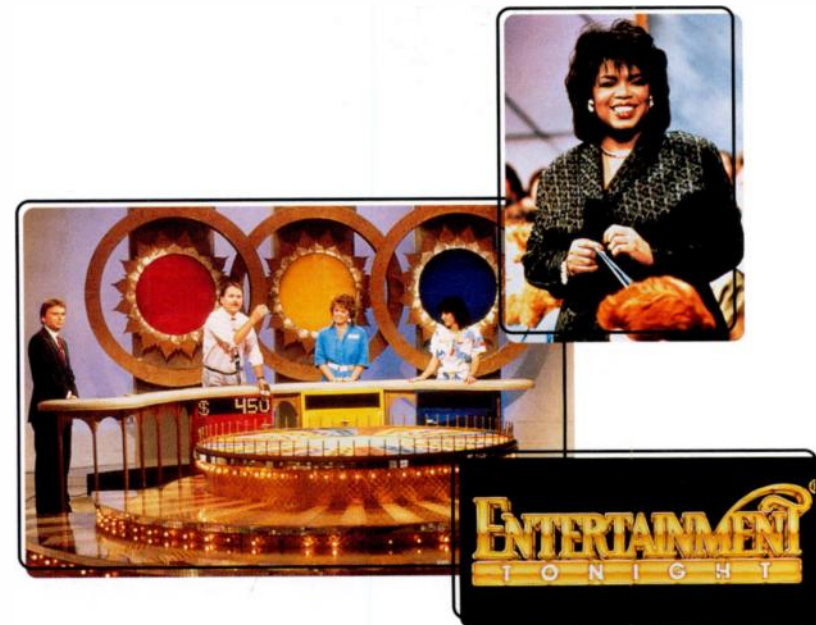
The National People Meter data are used to evaluate a program's national strength for national advertisers who advertise in these shows.

NSS also provides other services which are used to evaluate a program's performance across 210 local TV markets in the U.S. These services include:

The Cassandra Report — provides a measure of a program's delivery across all markets.

The ROSP Report — provides a measure of a program's performance on a total and individual market basis.

The local reports are used by syndicators to assist in the distribution process as well as to perform cross market competitive analysis.



TOP 10 SYNDICATED PROGRAMS
NATIONAL SERVICES—MAY 1999*

Rank	National Program NSS Ratings	National Household Rating	Number of Stations/ Percentage of U.S. Coverage
1	WHEEL OF FORTUNE—SYN	10.6	232/99
2	JEOPARDY	8.9	225/99
3	JUDGE JUDY	6.8	220/98
4	OPRAH WINFREY SHOW	6.5	239/99
5	FRIENDS—SYN	6.3	222/91
5	JERRY SPRINGER	6.3	208/96
7	SEINFELD	5.8	236/98
8	ENTERTAINMENT TONIGHT	5.5	184/95
9	FRASIER—SYN	5.0	210/97
9	X-FILES—SYN	5.0	238/99

Source: Galaxy Explorer, May 1999 *These data are reported weekly in the "NSS Pocketpiece"

TOP 10 SYNDICATED PROGRAMS
EQUIVALENT NATIONAL RATINGS COMPILED FROM
LOCAL AUDIENCE ESTIMATES—MAY 1999

Rank	Cassandra Program Ratings	National Household Rating	Number of Stations/ Percentage of U.S. Coverage
1	WHEEL OF FORTUNE (M-F)	13.0	197/99.2
2	JEOPARDY (M-F)	10.8	193/98.7
3	OPRAH WINFREY SHOW	7.8	201/99.5
4	WHEEL OF FORTUNE WKND	6.2	165/84.5
5	SEINFELD	6.1	201/99.5
6	JERRY SPRINGER SHOW	6.0	175/96.7
7	ENTERTAINMENT TONIGHT	5.6	156/92.4
8	X-FILES	5.5	204/99.5
9	JUDGE JUDY	5.4	192/98.4
10	FRIENDS	4.9	130/89.0

Source: Cassandra May 1999 Equivalent National Ratings Volume B

THE FIRST FIFTY YEARS

In 1923 a young engineer named Arthur C. Nielsen launched a research company, A.C. Nielsen, to conduct market research. By 1936 Nielsen acquired a mechanical metering device called an "Audimeter" to track radio listening. Throughout the 1930s and 1940s the company refined and improved sampling and metering expertise. In 1949 the Mailable Audimeter made it possible to store a week of tuning data. By 1954 the television industry began a period of rapid growth. With new stations on the air and television set manufacturing booming, the need for audience research was clear, and Nielsen was ready to meet the challenge. The rest, is history.

Throughout the next 50 years, the television ratings company, which has come to be known as Nielsen Media Research, has continued to refine and innovate. In a world where knowledge is power, our job is to help our customers unlock the power of media. We are proud of the role we have played in television history and are poised for the future of media.



1921 - Philo Farnsworth has the idea for how to create images using electrons. He transmits the first electronic image in 1927.

1923 - Vladimir Zworykin files for a patent of his television transmission tube called the iconoscope.



1923 - Arthur C. Nielsen, age 26, founds the A.C. Nielsen Company to conduct market research.

1934 - The Communications Act, through the creation of the Federal Communications Commission (FCC), establishes a regulatory and economic framework for commercial broadcasting in the U.S.



1936 - Arthur Nielsen acquires the "Audimeter," developed by MIT professors Robert Elder and Louis Woodruff.

1942 - A.C. Nielsen introduces the Audimeter to measure national radio audiences. The Nielsen Radio Index begins commercial network radio measurement service using the Audimeter in sample homes.

1946 - The DuMont television network is formed. It went out of business in 1955.

1947 - *Howdy Doody*, one of the first children's series on network television, debuts on NBC.



1948 - *Texaco Star Theater* with Milton Berle premieres on NBC.



1948 - *Arthur Godfrey's Talent Scouts* premieres on CBS in December.

IN THE BEGINNING

1926 - RCA forms the National Broadcasting Company (NBC) and transmits radio broadcasts to affiliate stations across the country. NBC begins its first TV transmission in 1931 and its first "network" broadcasting in 1940.

1927 - Columbia Broadcasting System (CBS) is formed.

1936 - Canadian Broadcasting Corporation's (CBC) English and French television services grow out of CBC Radio.

1943 - American Broadcasting Company (ABC) is formed.

1945 - A.C. Nielsen introduces Radio measurement service in Cincinnati.

1947 - The first network TV news series, and now the longest running news series, *Meet the Press*, debuts November 6 on NBC.



1949 - The "Mailable Tape Aud-meter" is introduced into sample homes which records radio usage

information on a 35mm film cartridge which is then mailed back to the A.C. Nielsen Company.

1949 - *Captain Video and His Video Rangers*, one of the more popular television series for children, is telecast on DuMont.

The Nielsen Television Index (NTI), the nationwide television audience measurement service, is established using the "Mailable Tape Audimeter".

A.C. Nielsen acquires the rival measurement service, the Radio and Television Hooper Ratings.

1950



I Love Lucy, one of the most popular shows in the history of television, debuts on CBS. It is the first sitcom to be filmed in front of a live audience.

Television penetration in the U.S. reaches 10 million homes.

Sen. Estes Kefauver's hearings on organized crime offer viewers their first-ever live coverage of Senate proceedings.

1951



See It Now debuts on CBS. A collaboration of Edward R. Murrow and Fred W. Friendly, *See It Now* is the first of the great TV documentary series.

The FCC lifts its "freeze" on the construction of new television stations (a 5-year moratorium on new station licenses), resulting in one of the greatest proliferations of TV stations in the nation's history.

1952

Hallmark Hall of Fame begins on NBC as a weekly series, and becomes one of television's best known dramatic anthology series.

The Guiding Light, the longest running daytime drama and former radio serial, debuts on CBS.



1953

TV Guide begins publishing. Its first cover features Desi Arnaz Jr., the new baby of Lucille Ball and Desi Arnaz.

The first nationally televised Academy Awards, hosted by Bob Hope, airs on NBC.



"Recordimeters" are introduced by A.C. Nielsen to verify accuracy of paper diaries in radio and television sample homes.

A.C. Nielsen takes delivery of the granddaddy of the modern computer, the IBM 650, and uses it to compute audience measurement.

1954

Live coverage of the Army-McCarthy Hearings airs on ABC and the DuMont Networks.



Nielsen Station Index (NSI) forms to provide local market TV audience measurement in New York, Los Angeles, Philadelphia, San Francisco, Boston, Chicago, and Seattle.

The Mickey Mouse Club premieres on ABC, and legions of children around the country become Mouseketeers.



The pillar of pre-schooler programming, *Captain Kangaroo*, debuts on CBS.

The NSI service expands to the Top 30 markets, and the term Designated Market Area (DMA) is introduced to define a television market, exclusive of any other.

President Dwight D. Eisenhower gives the first televised presidential news conference, on ABC.

1955



Gunsmoke premieres on CBS and becomes TV's longest-running Western.

Jackie Gleason and *The Honeymooners* debuts on CBS and becomes one of TV's all-time classic comedies.



NBC's Chet Huntley and David Brinkley become the first news anchor team, *The Huntley-Brinkley Report*.



1956

Elvis swivels on *The Ed Sullivan Show* on CBS.



1957

Dick Clark's *American Bandstand*, the first network series devoted to rock-and-roll, kicks off on ABC.



The offbeat western, *Maverick*, is a hit on ABC, starring James Garner, Jack Kelly and Roger Moore.

1958

NSI's local audience measurement service, using paper diaries, extends to 50 markets.

The *Twilight Zone*, with its tales of the supernatural, debuts on CBS and turns Rod Serling, host and creator, into a TV star.



Bonanza begins its 14-year run on NBC.

1959



Overnight local market ratings are introduced for the first time through

the invention of the "Instantaneous Audimeter." It is installed first in New York. While the earlier meters required sample homes to mail in the recording cartridge every week, the new NSI meter requires no interaction from the household. It collects set-tuning data on a minute-by-minute basis.

A.C. Nielsen starts television and radio measurement service in Canada.



The Flintstones first airs on ABC and becomes the first primetime cartoon series made especially for television.

John F. Kennedy and Richard Nixon participate in the first televised presidential debates. This changes the future of political campaigning. More than 28 million homes, on average, watch the debates on ABC, CBS and NBC.

1960

Muhammad Ali wins the gold medal at the Olympic Games in Rome, Italy airing on CBS.

Candid Camera with Allen Funt begins its 8-year run on CBS.



NSI expands local measurement service to all 219 markets in the Continental U.S.

FCC Chairman Newton Minow describes the TV programming landscape as a "vast wasteland" and calls for heightened federal regulation of the medium.

1961

CTV, Canada's national commercial network, begins broadcasting to eight affiliates.

The Beverly Hillbillies begins its 9-year run on CBS.



NASA blasts John H. Glenn into space on February 20, and more than 29 million U.S. homes tune in between 2 and 3 PM EST.

The Virginian, one of the most popular TV Westerns, in a 90-minute format, begins an eight-season run on NBC.

1962

A.C. Nielsen discontinues radio audience measurement service to focus on television.

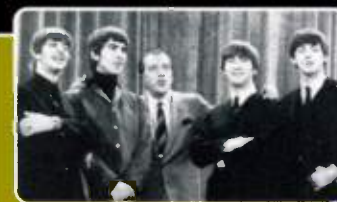
1963

Live television coverage of President Kennedy's funeral unites TV audiences around the world.

Millions of TV viewers watch Dr. Martin Luther King, Jr. deliver his "I Have A Dream" speech from the steps of the Lincoln Memorial in Washington.



The Beatles sing "She Loves You...Yea, Yea, Yea" on *The Ed Sullivan Show* on CBS and become a huge U.S. hit.



1964

The Man from UNCLE, featuring Robert Vaughn and David McCallum as secret agents, premieres on NBC.

The NSI service introduces the local ratings report called the "Viewers in Profile" ViP.

1965

Star Trek acquires a loyal cult of "Trekkies" after it premieres on NBC, and hits warp speed in syndication.



1966



The Fugitive ends its run on ABC with one of the highest rated drama series finales.

Green Bay defeats Kansas City in the first *Superbowl*, watched by more than 20 million homes on both CBS and NBC.

1967



Phil Donahue begins a local talk show on WLWD-TV in Dayton, OH, takes the show into national syndication in 1970, and changes daytime talk forever.

60 Minutes debuts on CBS and goes on to become the longest running primetime news series in TV history.



1968

Julia premieres on NBC, starring Diahann Carroll, and is the first sitcom starring an African-American woman.

Cigarette advertisements are snuffed out on TV and Radio.

Public Broadcasting Service (PBS) begins, and in November launches *Sesame Street*, one of the most influential achievements in children's TV.



1969

Millions watch TV pictures transmitted live from the Moon, as Neil Armstrong becomes the first man to walk on the moon.



Los Angeles becomes the second NSI Metered Market.



Flip Wilson is the first black entertainer to host a top-rated network program, on NBC.

1970

Two key FCC rules are enacted and lead to growth of first-run syndication. The Financial Interest and Syndication (Fin-Syn) bars networks (ABC, CBS, NBC) from having a financial interest in programs. The Primetime Access Rule (PTAR) prohibits network affiliates in the top 50 markets from airing network (except news) or off-network programs in Prime Access Time (7-8pm ET).

More than 11 million homes watch the first telecast of ABC's *NFL Monday Night Football*. The New York Jets played the Cleveland Browns.



The controversial program *All in the Family* starts its five-year run on CBS as TV's top-rated show.

Coca-Cola's "I'd Like to Teach the World to Sing" commercial airs and becomes an instant hit.

1971

Nielsen Media Research introduces the Storage Instantaneous Audimeter,



which is capable of storing TV set usage data and forwarding data overnight, via phone line.

Masterpiece Theatre begins its classic run on PBS. Imported from England and underwritten by Mobil Oil Corp., the series will spawn some of the finest programming on American television, including *Upstairs, Downstairs*, *The Jewel in the Crown*, *Vanity Fair* and others.



Bob Newhart plays a psychologist to a cast of offbeat characters in his second series, *The Bob Newhart Show*, on CBS.

1972

Maude, the successful and somewhat controversial spin-off of *All in the Family*, debuts on CBS, starring Bea Arthur.

National daily ratings become available from Nielsen Media Research.

1973



The "Battle of the Sexes" tennis match on September 20 from the Houston

Astrodome, in which the reigning queen of tennis, Billie Jean King, defeats the reigning king of male chauvinism, Bobby Riggs, captivates the television audience on ABC.



President Nixon announces his resignation on August 8; Farewell and departure on August 9; President Ford takes oath of office. An estimated 46.9 million households watch one or more of these events.

QB VII, the TV adaptation of the Leon Uris novel, airs on ABC and begins the mini-series phenomenon.

1974

The Fonz takes over American pop culture, as the ABC sitcom *Happy Days*, rockets to fame. The Fonz is played by Henry Winkler, and the series is quickly built around him.



Little House on the Prairie, starring Michael Landon in this hour-long drama, becomes a Monday night fixture on NBC.

1975

Saturday Night Live premieres on NBC and continues to air for the next 25 years.



Welcome
Back, Kotter
springs John
Travolta to
stardom on
this successful
ABC sitcom.



HBO begins national
satellite distribution,
and becomes the driving force in
the growth of cable.

1976

ABC debuts the popular *Battle of the Network Stars* which matches TV stars against each other in a variety of different races and competitions. This biannual special airs until 1988.

Barbara Walters becomes the first female anchor on a network evening newscast, on *The ABC Evening News* with Harry Reasoner.



Chicago becomes the third NSI Metered Market.

The Newshour with Jim Lehrer and Robert MacNeil premieres on PBS, and remains on air for more than three decades.

Laverne and Shirley begins its six-year run on ABC as a smash hit. The show, with Penny Marshall and Cindy Williams, is a spin-off of *Happy Days*.



1977

Nielsen Media Research introduces Automated Measurement of Lineups (AMOL) technology, which electronically tracks network feeds to local affiliates. This permits Nielsen Media Research to know what stations carry each network program.

Roots airs on ABC for eight consecutive nights and becomes the highest rated mini-series to date.



1978

Nielsen Media Research improves its basic meter of the Micro Processor Home Unit (MPHU). This instrument has increased memory, has the ability to monitor 16 attachments, scans every 2.7 seconds.



San Francisco-Oakland-San Jose becomes the 4th NSI Metered Market.

Mork and Mindy premieres on ABC and rockets Robin Williams to stardom.



1979

ESPN becomes the first cable network to specialize in sports programming



Philadelphia; Boston; Washington, D.C.; and Dallas become NSI Metered Markets over the next 5 years.

Millions watch the "Miracle on Ice" coverage on ABC—U.S. hockey team wins Olympic gold at Lake Placid.



Ted Turner founds the round-the-clock, all-news network, Cable News Network (CNN).

Shogun, the five-part series based on James Clavell's novel, airs on NBC; three years in production, it is one of the most expensive mini-series ever produced for television.

1980

Nielsen Homevideo Index (NHI) service is established to provide measurement service for cable and homevideo, opening new opportunities for new media. Cable expands to 17.2 million homes.

"Who Shot JR?" is the question answered, as this November sweeps episode of *Dallas* is the highest rated drama telecast. Kristen did it.



Superstation WTBS becomes the first nationally measured cable network by NHI.

After two outstanding decades, Walter Cronkite steps down from anchoring the *CBS Evening News* and is replaced by Dan Rather.

The Local Oscillator Unit is introduced by Nielsen Media Research, and makes the process of installing meters onto TV sets in sample homes much easier.

1981



Entertainment Tonight brings celebrity gossip to television viewers and becomes one of the most successful syndicated shows of the 1980s.

Prince Charles and Lady Diana Spencer wed, while millions watch on television around the world.



The Piggyback Home Unit is put into use allowing Nielsen Media Research to use the Household phone line for data transmission.

Daily cable ratings become available from NHI. HBO, ESPN and Family Channel become nationally measured by NHI.

1982



"I Want My MTV". MTV becomes the first cable network solely dedicated to music. The first music video is "Video Killed the Radio Star" by the Buggles.

St. Elsewhere, the realistic hospital drama, debuts on NBC.

Final episode of *M*A*S*H* airs on CBS and establishes the record for the highest rated telecast, earning a 60.2 rating.



USA, MTV and CNN are nationally measured by NHI.

The first original movie on cable, *The Terry Fox Story*, is presented by HBO.

1983



Wheel of Fortune starring Pat Sajak begins its whirl in first-run syndication.

Thorn Birds and *Winds of War*, both on ABC, air in March and February, becoming the 2nd and 3rd highest rated mini-series to date.



ABC broadcasts *The Day After*, a two-hour made-for-TV film about thermonuclear war between the U.S. and Soviet Union. Because of its controversial nature, the movie appears with few advertisers but delivers a 46.0 rating.

Nielsen Media Research rolls out the Field Automations System (FAS) which expedites sample recruitment and meter installations of sample households by Nielsen Media Research's field staff.

Miami Vice on NBC captures the style of the 1980's and introduces MTV-style detectives to television.



1984

The A.C. Nielsen Company, parent of Nielsen Media Research, is acquired by The Dun & Bradstreet Corporation.

Lifetime, Headline News, TNN and TWC are nationally measured by NHI.

The Cosby Show premieres on NBC and defines the 1980's family sitcoms.



Nielsen Syndication Service (NSS) formed to provide audience measurement services for the burgeoning barter syndication business.

1985

Houston; Miami; Denver; Atlanta; Seattle; Hartford; Sacramento; Minneapolis; Phoenix; St. Louis; Milwaukee; Indianapolis; Tampa; and Cincinnati become NSI Metered Markets over the next 5 years.

Cable Audience Profile (CAP) is the first syndicated report to produce audience estimates for local cable systems.

Millions watch in shock and disbelief as the Challenger spacecraft blows up on live TV.



A&E, BET and Showtime are nationally measured by NHI.

1986

Oprah Winfrey's syndicated talk show goes national.



Nielsen Media Research converts

to the People Meter to produce national TV ratings with daily demographic data.

FOX, the 4th broadcast network, is launched.

1987



Star Trek: The Next Generation boldly goes where few have gone before, launching as a first-run syndication drama.

Nickelodeon, Nick-at-Nite, VH1 and Discovery Network are nationally measured by NHI.

Cable television reaches more than 48 million TV households, or 54% of the U.S.



Roseanne, centering on comedienne Roseanne Barr and John Goodman, is a smash hit on ABC.

1988

The 700 Club, a religious-oriented talk show, is re-launched by Pat Robertson.

TMC and TNT are nationally measured by NHI.

Cinemax becomes nationally measured by NHI.

The Energizer Bunny advertising campaign starts and keeps going and going and going.



ABC's coverage of Game 3 of the World Series is rocked by a San Francisco earthquake.

1989

The Wizard of Oz celebrates its 50th anniversary and its network television family success that, over the years, probably has attracted more viewers than any other film.



Twin Peaks debuts on ABC and becomes an instant cult sensation.



The Civil War five-night series airs on PBS and becomes the highest-rated series in PBS history.

The newest generation of meters, the S2000 Home Unit, is introduced by Nielsen Media Research. The



new measurement device combines home unit, modem and battery into one unit, increased storage capacity and has 24 attachments.

1990

CNBC and Nostalgia Good TV are nationally measured by NHI.

Portland, OR; San Antonio; Charlotte; Baltimore; San Diego; Kansas City; Orlando; West Palm Beach; Cleveland; and Detroit become NSI Metered Markets over the next 5 years.

Nielsen New Media Services formed to provide research services for non-traditional media such as cruise ships, airports, etc.

E!, Prevue, CMT, Comedy Central and TLC are nationally measured by NHI.

1991

Persian Gulf war ignites on television.



Nielsen Media Research, Univision and Telemundo launch the first national Hispanic measurement service, the Nielsen Hispanic Television Index (NHTI).

Superstation WGN is nationally measured by NHI.

Nielsen Hispanic Station Index (NHSI) is launched to provide local market Hispanic service; LA is the first market.

1992

Johnny Carson's 1992 retirement leads to the late night talk show war between *Late Night* with David Letterman and *The Tonight Show* with Jay Leno.



The *Cheers* finale on NBC closes down everyone's favorite Boston pub.

1993

SAVIE software system is acquired by Nielsen Media Research for use by advertisers in buying commercial time on local cable systems.

Cartoon Network, Sci-Fi, Odyssey and Court TV become nationally measured by NHI.

Monitor-Plus Service introduces "AdViews" software system capable of providing competitive advertising intelligence information across print, radio and television media.

One thousand households are added to the National People Meter sample; bringing the total to 5000 homes by August 1996.

1994

AMC, ESPN2, Travel Channel and fX become nationally measured by NHI.

The Winter Olympics on CBS gets a ratings boost by the controversy surrounding the women's figure skating competition between Tonya Harding and Nancy Kerrigan.



Baseball strike cancels the World Series.

Nielsen Sports Marketing Service is established.



Televised coverage of the O.J. Simpson trial brings large audiences to cable television.

Nielsen Media Research and CommerceNet conduct the first nationally projectable study of Internet usage.

Nielsen Media Research launches local people meter service in Toronto/Hamilton, Canada.

Nielsen Home Technology Report is the first report to track the usage of interactive video technology in the home.

ACNielsen and Nielsen Media Research become separate companies as a result of the breakup of The Dun & Bradstreet Corporation.



U.S. television audiences of more than 33 million watch live coverage of Princess Diana's funeral from London.

Internet usage tops 58 million in the U.S. and Canada, according to the latest estimates from Nielsen Media Research and CommerceNet.

The last episode of *Seinfeld* on NBC is watched by 76 million viewers on average.



Knowledge TV and America's Health Network are nationally measured by NHI.

Nielsen Media Research becomes an independent publicly traded company.



Mark McGwire slams record breaking 62nd home run as 25 million TV viewers cheer on.

The new advertising buying and campaign management system, New Millennium, is introduced by Nielsen Media Research.

Nielsen//NetRatings launches weekly Internet usage and advertising service.

Nielsen Media Research introduces its revolutionary new *NPOWER* system.

Game Show Network, Golf Channel and The BOX are nationally measured by NHI.

Who Wants to Be a Millionaire? airs on ABC and awards a seven-figure prize.



1995



Pittsburgh; Columbus, OH; Salt Lake City; New Orleans;

Memphis; Nashville; Greensboro; Jacksonville; Birmingham; Las Vegas; Raleigh; Providence; Norfolk; Oklahoma City; and Louisville become NSI Metered Markets over the next 5 years.

TV Food Network becomes nationally measured by NHI.

UPN and WB broadcast networks are launched.



1996

Nielsen CommerceNet study shows steady Internet growth; over 34 million Internet users are in the U.S. and Canada.

NSI announces largest increase in diary samples in the history of TV audience measurement.

Bravo, Disney Channel, HGTV and History Channel are nationally measured by NHI.

1997

Animal Planet, Fox News Channel, TV Land and MSNBC are nationally measured by NHI.



Tiger Woods wins the Masters on CBS, which cards record viewership for the tournament.

Nielsen Media Research launches local people meter service in Vancouver/Victoria, Canada.

1998

Nielsen Media Research, working with Microsoft Corporation, develops the first metering system to track TV viewing on the PC.

President Clinton is impeached, and more than 23 million viewers watch historic coverage from the House of Representatives.

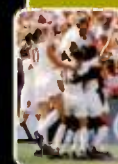
Nielsen Media Research begins field test of the Active/Passive Meter System in the Northeast of the U.S.

Nielsen Media Research launches local people meter service in Ontario, Canada.

The PAX TV network launches.



1999-2000



18 million TV viewers watch the U.S. Women's Soccer Team defeat China 5-4 in the World Cup Final on ABC.

VNU acquires Nielsen Media Research for \$2.7 billion.



NSI metered service to reach 50 markets in 2001.



Nielsen Media Research begins its 6th decade of helping its customers unlock the power of media.

CABLE NETWORKS

Cable networks continue to increase distribution, in part due to the growth of Alternative Delivery Systems (ADS) such as home satellite systems. In addition, "emerging" cable networks see significant growth as cable operators expand the number of networks carried. Based on the National People Meter Sample, overall cable penetration in the U.S. continues to grow. Here are estimates of the number of households in which each measured cable service is available.

CABLE NETWORK COVERAGE AREAS IN MILLIONS (SEPT-AUG)

Cable Networks	1997-1998 Season (000)	1998-1999 Season (000)	Percent Change	Cable Networks	1997-1998 Season (000)	1998-1999 Season (000)	Percent Change	Cable Networks	1997-1998 Season (000)	1998-1999 Season (000)	Percent Change
A&E NETWORK	70,891	73,718	3.99%	FX	34,501	38,680	12.11%	THE HISTORY CHANNEL	45,910	55,241	20.32%
AMERICA'S HEALTH NETWORK*	8,090	8,764	8.33%	GOODLIFE TELEVISION	5,114	5,238	2.42%	THE LEARNING CHANNEL	63,306	68,526	8.25%
AMERICAN MOVIE CLASSICS	66,784	69,637	4.27%	HEADLINE NEWS	67,735	70,656	4.31%	THE MOVIE CHANNEL	8,847	10,811	22.20%
ANIMAL PLANET	34,529	42,101	36.41%	HOME AND GARDEN TV	38,049	50,355	32.34%	THE TRAVEL CHANNEL	19,310	26,138	35.36%
BRAVO	30,366	37,086	22.13%	HOME BOX OFFICE	28,185	29,008	2.92%	THE WEATHER CHANNEL	69,471	72,000	3.64%
BLACK ENTERTAINMENT TV	52,884	56,142	6.16%	KNOWLEDGE TV*	13,902	13,239	-4.77%	TNN	71,102	73,614	3.53%
CABLE NEWS NETWORK	73,122	76,674	3.49%	LIFETIME TELEVISION	70,415	73,244	4.02%	TURNER NETWORK TELEVISION	72,818	75,278	3.38%
CINEMAX	16,242	17,532	7.94%	MTV: MUSIC TELEVISION	68,760	71,140	3.46%	TV GUIDE CHANNEL (PREVIEW)	50,014	53,505	6.98%
CMT	41,785	40,312	-3.52%	NICKELODEON/NICK-AT-NITE	71,856	74,387	3.52%	TV LAND	24,205	35,965	44.87%
CNBC	64,450	68,223	5.85%	ODYSSEY	27,815	28,239	1.53%	USA NETWORK	72,936	75,298	3.22%
COMEDY CENTRAL	47,782	56,857	18.99%	SCI-FI CHANNEL	47,885	53,957	12.68%	VH1	61,187	65,407	6.90%
COURT TV	33,198	34,390	3.59%	SHOWTIME	15,509	16,455	6.10%	WGN CABLE	42,499	46,266	8.86%
E! ENTERTAINMENT TV	47,606	54,609	14.71%	TBS-SUPERSTATION*	74,167	76,489	3.10%				
ESPN-TOTAL SPORTS NETWORK	73,366	75,695	3.17%	THE CARTOON NETWORK	48,483	55,618	14.72%	CABLE PLUS W/PAY*	54,901	55,678	1.41%
ESPN2	55,267	63,038	14.06%	THE DISCOVERY CHANNEL	73,228	75,858	3.59%	TOTAL CABLE PLUS*	75,332	77,492	2.87%
FOOD NETWORK	30,429	37,899	24.55%	THE DISNEY CHANNEL	34,907	45,128	29.27%	TOTAL WIRED CABLE	68,358	69,541	1.73%
FOX FAMILY CHANNEL	71,398	74,009	3.66%	THE GAME SHOW NETWORK*	N/A	16,941	N/A	PREMIUM PAY**	45,884	48,497	5.69%
FOX NEWS	28,063	38,028	35.51%								

*Networks not measured for the entire year. **Disney changed from Pay to Basic as of July 1999.

Cable Network Viewing Primetime (Monday-Sunday, 8pm-11pm)

Cable network rating estimates are reported both within each network's coverage area and as a percent of the total U.S. audience. When expressed within each cable network's coverage area, the ratings represent the percentage of households able to receive a given network that are tuned to that network. Since every cable network has a different "coverage area", these ratings should not be compared from one network to another.

THIRD QUARTER 1999-MON-SUN 8-11PM

Network	Coverage Area Household Rating	Total U.S. Household Rating	Number of Households
Ad-Supported Networks			
A&E NETWORK	1.3	1.0	1,007,000
AMERICAN MOVIE CLASSICS	0.8	0.6	599,000
ANIMAL PLANET	0.5	0.3	251,000
BLACK ENTERTAINMENT TV	0.6	0.3	327,000
BRAVO	0.3	0.1	105,000
CABLE NEWS NETWORK	0.8	0.6	594,000
CMT-COUNTRY MUSIC TV	0.3	0.1	127,000
CNBC	0.4	0.3	300,000
COMEDY CENTRAL	0.7	0.4	391,000
COURT TV	0.4	0.1	137,000
DISNEY CHANNEL	1.9	1.0	1,012,000
E! ENTERTAINMENT TV	0.5	0.3	300,000
ESPN	1.7	1.3	1,319,000
ESPN2	0.5	0.3	340,000
FOOD NETWORK	0.4	0.2	153,000
FOX FAMILY CHANNEL	0.9	0.7	668,000
FOX NEWS CHANNEL	0.5	0.2	189,000
FX	0.7	0.3	292,000
GAME SHOW NETWORK	0.4	0.1	80,000
GOODLIFE TELEVISION NETWORK	0.2	<<	13,000
HEADLINE NEWS	0.2	0.2	167,000
HOME AND GARDEN TV	0.6	0.3	342,000
KNOWLEDGE TV	0.1	<<	N/A
LIFETIME TELEVISION	1.7	1.3	1,268,000
MSNBC	0.4	0.2	213,000

Network	Coverage Area Household Rating	Total U.S. Household Rating	Number of Households
Ad-Supported Networks			
MTV: MUSIC TELEVISION	1.2	0.8	835,000
NICKELODEON/NICK-AT-NITE	1.7	1.3	1,297,000
ODYSSEY	0.2	0.1	59,000
SCI-FI CHANNEL	0.8	0.5	458,000
TBS-SUPERSTATION	1.9	1.5	1,472,000
THE CARTOON NETWORK	1.7	1.0	1,015,000
THE DISCOVERY CHANNEL	1.1	0.8	835,000
THE HISTORY CHANNEL	0.8	0.4	446,000
THE LEARNING CHANNEL	0.8	0.6	578,000
THE TRAVEL CHANNEL	0.2	0.1	71,000
THE WEATHER CHANNEL	0.5	0.3	331,000
TNN	0.7	0.5	532,000
TURNER NETWORK TELEVISION	1.8	1.4	1,358,000
TV GUIDE CHANNEL	0.5	0.3	254,000
TV LAND	0.8	0.3	315,000
USA NETWORK	2.3	1.7	1,718,000
VH1	0.5	0.4	361,000
WGN CABLE	0.8	0.4	395,000
Premium Pay Networks			
CINEMAX	3.2	0.6	586,000
HOME BOX OFFICE	5.6	1.7	1,683,000
SHOWTIME	2.8	0.5	492,000
THE MOVIE CHANNEL	1.3	0.2	157,000

Source: Nielsen Cable Activity Report-Primetime 3rd Quarter, 1999 (6/28/99-9/26/99). Note: Data represent primary feed for each cable network within its respective universe. Cable Network Coverage Area Rating % = Average audience in percent of homes able to receive an individual cable network/superstation. Total U.S. Rating % = Average audience in percent of total U.S. TV households. <<: Below minimum reporting standards. N/A: Not available.

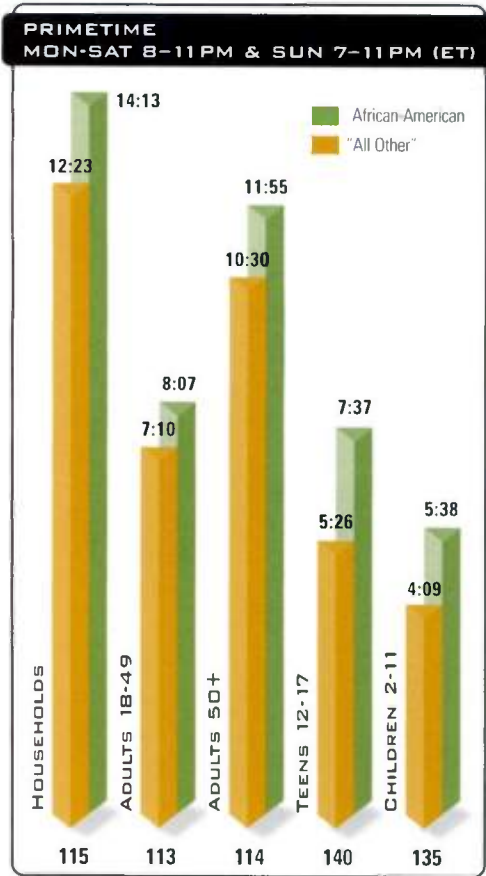
VIEWING AMONG AFRICAN-AMERICANS

In the fall of 1991, Nielsen Media Research introduced African-American television audience viewing data as a standard reported category in certain national reports. The addition of this category enables the media industry to evaluate African-American television viewing patterns and preferences and to make informed advertising and programming decisions. How does this ethnic audience view television? Are there notable differences in the viewing behavior among African-Americans compared to "All Other" viewers?



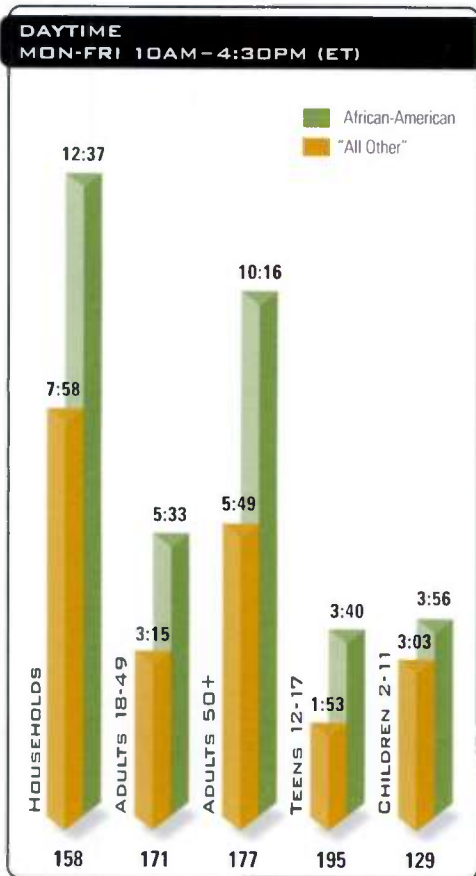
As these charts indicate, there are distinct differences in both viewing patterns and program preferences. First, African-Americans, in general, watch more television than the "All Other" category (all viewers except African-Americans). In primetime, for instance, African-American households watch an average of 2 more hours per week. In daytime, African-American households watch close to 5 hours more per week.

WEEKLY TV USAGE (HOURS:MINUTES) BY DAYPART AFRICAN-AMERICAN VS. "ALL OTHER"

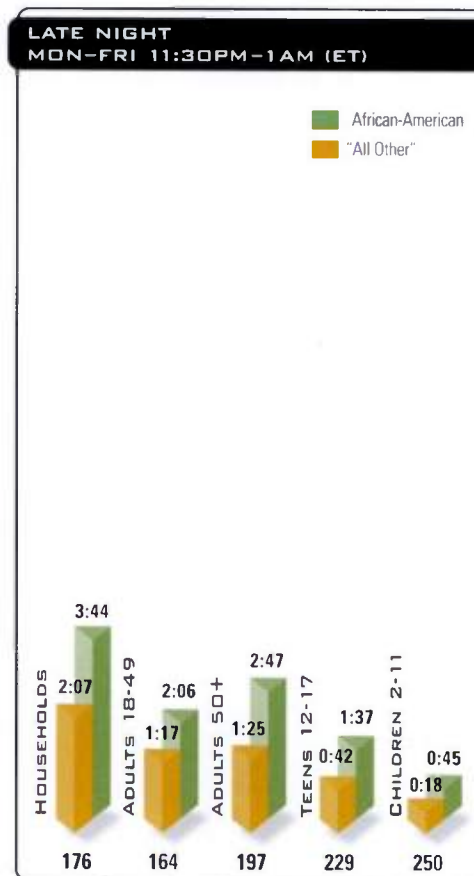


INDEX: AFRICAN-AMERICAN/"ALL OTHER"

Source: Personal NAD Facility, September 1999



INDEX: AFRICAN-AMERICAN/"ALL OTHER"



INDEX: AFRICAN-AMERICAN/"ALL OTHER"



African-American Viewing

Individual program rankings reveal distinctly different choices among African-American audiences compared to “All Other” audiences. Looking at broadcast network primetime programs, among the top 15 shows in African-American households, only one appears in the top 15 programs among “All Other” households. African-American viewers show a clear preference for programs with predominantly African-American casts.

HOUSEHOLD RATINGS—TOP 15 PRIMETIME PROGRAMS

Total U.S.		African-American		“All Other”	
Program	Household Rating	Program	Household Rating	Program	Household Rating
NFL MONDAY NIGHT FOOTBALL	15.7	NFL MONDAY NIGHT FOOTBALL	18.7	NFL MONDAY NIGHT FOOTBALL	15.2
NFL MONDAY SHOWCASE	12.9	THE PARKERS	17.7	STARK RAVING MAD	13.3
STARK RAVING MAD	12.3	MALCOLM & EDDIE (MON)	17.1	ONCE AND AGAIN	12.8
ONCE AND AGAIN	12.3	GROWN UPS	16.4	FRASIER	12.8
WEST WING	12.1	MALCOLM & EDDIE	15.4	WEST WING	12.6
FRASIER	11.9	THE STEVE HARVEY SHOW	15.3	NFL MONDAY SHOWCASE	12.6
FAMILY LAW	11.5	NFL MONDAY SHOWCASE	14.9	FRIENDS	12.1
FRIENDS	11.4	STEVE HARVEY, SUN	14.5	FAMILY LAW	11.9
BECKER	10.4	MOESHA	14.2	BECKER	11.2
LAW AND ORDER: SVU	10.0	FOR YOUR LOVE	13.2	EVERYBODY LOVES RAYMOND	10.8
EVERYBODY LOVES RAYMOND	10.0	WALKER TEXAS RANGER	12.5	THIRD WATCH	10.2
THIRD WATCH	9.8	THE JAMIE FOXX SHOW	12.4	LAW AND ORDER: SVU	10.2
TOUCHED BY AN ANGEL	9.8	SMART GUY	11.0	JESSE	10.1
JUDGING AMY	9.7	FOX WEDNESDAY NIGHT MOVIE	10.8	JUDGING AMY	9.9
60 MINUTES	9.7	TOUCHED BY AN ANGEL	10.7	TOUCHED BY AN ANGEL	9.7
				60 MINUTES	9.7

Source: Personal NAD Facility, September 1999.

VIEWING AMONG HISPANICS

Nielsen Hispanic Television Index (NHTI) is the first and only national service fully dedicated to monitoring the viewing habits of the diverse Hispanic Community in the U.S. As background, in 1988 the Spanish Television Research Council requested proposals from several companies, including Nielsen Media Research, for the development of a new service to measure Hispanic TV viewing habits in the U.S. After reviewing the responses from various companies, the council selected Nielsen Media Research. The Nielsen Hispanic Television Index (NHTI) for national audience measurement and Nielsen Hispanic Station Index (NHSI) for local audience measurement were established in 1992 to provide information specific for advertisers and programmers targeting this universe.



The growth within the U.S. Hispanic population continues to outpace Non-Hispanics. For 1999-2000, Nielsen Media Research estimates there are 8.67 million Hispanic television households in the U.S. Between January 1993 and January 1999 the number of Hispanic persons age 2 and over in TV households increased by 27% from 22.2 million to 28.3 million.

Information from the NHTI service indicates that Hispanic households tend to be larger and their television usage greater than the general market. While adults and teens in Hispanic households view less television than the general market, children view more. Due to the larger household size, viewing levels among Hispanic households tend to be more comparable to total U.S. households with three or more members. The column titled "index" demonstrates how the total U.S. compares to the Hispanic sample.

COMPARISON OF AVERAGE HOURS OF
TUNING PER WEEK (OCTOBER 1999)

TOTAL DAY MON-SUN 24 HRS

	Hispanic HH Hrs:Min Viewed/ Week	Total U.S. HH Hrs:Min Viewed/ Week	Index to Hisp.	U.S. HH's w/3+ Hrs:Min Viewed/ Week	Index to Hisp.
HOUSEHOLDS	56:07	52:15	93	61:29	110
WOMEN 18+	28:24	32:46	115	29:24	104
MEN 18+	23:41	28:54	122	25:22	107
TEENS 12-17	18:59	19:39	104	19:19	102
CHILDREN 2-11	20:30	19:39	96	18:39	91

PRIMETIME MON-SAT 8-11PM & SUNDAY 7-11PM

	Hispanic HH Hrs:Min Viewed/ Week	Total U.S. HH Hrs:Min Viewed/ Week	Index to Hisp.	U.S. HH's w/3+ Hrs:Min Viewed/ Week	Index to Hisp.
HOUSEHOLDS	13:44	13:20	97	14:42	107
WOMEN 18+	8:12	9:22	114	8:06	99
MEN 18+	7:18	8:53	122	7:51	108
TEENS 12-17	5:47	5:59	104	5:51	101
CHILDREN 2-11	4:55	4:45	97	4:33	93

Source: NHTI, NTH October 1999.

Local Markets

Listed below are the 16 Hispanic markets that Nielsen Hispanic Station Index (NHSI) measures.

LOCAL HISPANIC UNIVERSE ESTIMATES -
IN THE NHSI MEASURED MARKETS

Market	Hispanic TV Households	All TV Households	Percent of Hispanic Households
LOS ANGELES, CA	1,502,780	5,234,690	28.7
NEW YORK, NY	1,031,330	6,874,990	15.0
MIAMI-Ft. LAUDERDALE, FL	486,850	1,441,570	33.8
SAN FRANCISCO-OAKLAND- SAN JOSE, CA	348,410	2,423,120	14.4
CHICAGO, IL	331,250	3,204,710	10.3
HOUSTON, TX	326,280	1,712,060	19.1
SAN ANTONIO, TX	318,230	684,730	46.5
DALLAS-Ft. WORTH, TX	225,140	2,018,120	11.2
HARLINGEN-WESLACO- BROWNSVILLE-MCALLEEN, TX	206,720	254,460	81.2
PHOENIX, AZ	201,150	1,390,750	14.5
SAN DIEGO, CA	189,110	980,620	19.3
ALBUQUERQUE-SANTA FE, NM	189,050	568,650	33.2
EL PASO, TX	177,980	276,980	64.3
FRESNO-VISALIA, CA	175,410	511,050	34.3
SACRAMENTO-STOCKTON- MODESTO, CA	172,650	1,159,820	14.9
CORPUS CHRISTI, TX	98,970	184,900	53.5

Source: Nielsen Media Research's Black and Hispanic Market and Demographic Rank, September 1999.

Total Hispanic and Spanish Dominant TV Households

Language usage has an important impact on TV viewing choices. As noted in these charts, a substantial share of tuning in Hispanic TV households and viewing by the people therein is to Spanish language television. The share of audience to Spanish language TV increases dramatically among those households considered to be Spanish Dominant. Even though Children and Teens view less Spanish language TV than adults, they still view more Spanish language TV when residing in Spanish Dominant homes.

Spanish Dominant households are those where the adults in the household told Nielsen Media Research that they speak either only Spanish or mostly Spanish or a combination thereof while at home.

DISTRIBUTION OF VIEWING BY LANGUAGE
MON-SUN 24 HRS

Total Hispanic Households	Households	Adults 18+	Women 18-49	Men 18-49	Teens 12-17	Children 2-11
SPANISH LANGUAGE TV	33%	42%	41%	37%	23%	28%
ENGLISH LANGUAGE TV	67%	58%	59%	63%	77%	72%

Spanish Dominant Households	Households	Adults 18+	Women 18-49	Men 18-49	Teens 12-17	Children 2-11
SPANISH LANGUAGE TV	56%	70%	72%	64%	37%	42%
ENGLISH LANGUAGE TV	44%	30%	28%	36%	63%	58%

Note: Households are classified by the language of adults within the household. People are classified by the language of the home in which they reside. Example: Children in households classified as "only Spanish" may speak English as well. Source: Based on NHPM Sample Viewing during the month of November 1998.



LOCAL TELEVISION

There are 210 individual local markets in the United States, identified by Nielsen Media Research as Designated Market Areas (DMAs). Television viewing behavior, for example, varies by market—both in terms of Early Morning and Late Night viewing patterns as well as program preferences.

The Late Night daypart is defined as 11:30pm-1am Eastern Time. That translates to 10:30pm-Midnight in the Central Time Zone. Early morning, defined as 7:00-10:00am, is the same across all time zones. In research lingo, the term used to identify TV usage is called HUT—Households Using Television.

EARLY MORNING (7AM-10AM)-MAY 1999

Highest HUT Levels		Lowest HUT Levels	
Market	HUT	Market	HUT
NORFOLK-PORTSMOUTH-NEWPORT NEWS, VA	34.7	FARGO-VALLEY CITY, ND	19.5
NEW ORLEANS, LA	34.7	AUSTIN, TX	19.4
BIRMINGHAM, (ANNISTON-TUSCALOOSA), AL	34.3	CEDAR RAPIDS-WATERLOO & DUBUQUE, IA	19.4
MEMPHIS, TN	34.0	BILLINGS, MT	19.3
LAS VEGAS, NV	33.8	LAFAYETTE, IN	19.3
ATLANTA, GA	33.1	HELENA, MT	19.2
LAREDO, TX	32.6	FAIRBANKS, AK	18.7
OKLAHOMA CITY, OK	32.2	GAINESVILLE, FL	18.6
HOUSTON, TX	31.7	MANKATO, MN	18.1
NEW YORK, NY	31.4	MADISON, WI	16.6

Source: Nielsen Galaxy Profile, May 1999. HUT: Percent of Households Using Television.

LATE NIGHT (11:30PM-1AM)-MAY 1999

Highest HUT Levels		Lowest HUT Levels	
Market	HUT	Market	HUT
NORFOLK-PORTSMOUTH-NEWPORT NEWS, VA	42.5	ROCHESTER, MN-MASON CITY, IA-AUSTIN, MN	6.4
NEW YORK, NY	41.0	LA CROSS-EAU CLAIRE, WI	6.3
NEW ORLEANS, LA	40.7	HELENA, MT	6.3
JACKSONVILLE, FL	37.9	WAUSAU-RHINELANDER, WI	6.2
RALEIGH-DURHAM (FAYETTEVILLE), NC	37.5	BILLINGS, MT	5.7
ATLANTA, GA	37.3	CHEYENNE, WY-SCOTTSDUFF, NE	5.7
PHILADELPHIA, PA	36.7	CASPER-RIVERTON, WY	5.7
DETROIT, MI	36.3	BEND, OR	5.5
MIAMI-Ft. LAUDERDALE, FL	36.1	GLENDIVE, MT	5.0
CLEVELAND, OH	35.4	GRAND JUNCTION-MONTROSE, CO	4.0

Source: Nielsen Galaxy Profile, May 1999. HUT: Percent of Households Using Television.



Local Television Metered Market Measurement

Nielsen Station Index (NSI) provides television audience measurement in 210 markets across the U.S. based on local samples. These markets are referred to as Designated Market Areas (DMAs).

As of April 2001, 50 DMAs in the U.S. will have continuous overnight measurement. In these 50 markets, NSI uses an electronic metering system to provide set-tuning information on a daily basis. In these cases, TV set-tuning information is collected from a separate sample of homes. This household tuning information is augmented at least four months of the year with demographic viewing data, which is collected from another sample of households, which maintain a paper diary for one week.

50 NSI METERED MARKETS

BY DMA RANK 1999-2000 Rank Designated Market Area	Number of TV Households	Percent of U.S.	Date Metered
1 NEW YORK, NY	6,874,990	6.820	Nov-59
2 LOS ANGELES, CA	5,234,690	5.193	Nov-70
3 CHICAGO, IL	3,204,710	3.179	Nov-76
4 PHILADELPHIA, PA	2,670,710	2.650	Oct-81
5 SAN FRANCISCO-OAKLAND-SAN JOSE, CA	2,423,120	2.404	Oct-78
6 BOSTON (MANCHESTER), MA	2,210,580	2.193	Apr-84
7 DALLAS-Ft. WORTH, TX	2,018,120	2.002	Oct-84
8 WASHINGTON, DC (HAGERSTOWN)	1,999,870	1.984	May-84
9 DETROIT, MI	1,855,500	1.841	Jul-94
10 ATLANTA, GA	1,774,720	1.761	Oct-86
11 HOUSTON, TX	1,712,060	1.698	May-85
12 SEATTLE-TACOMA, WA	1,591,100	1.578	May-87
13 TAMPA-ST. PETERSBURG (SARASOTA), FL	1,485,980	1.474	Nov-89
14 MINNEAPOLIS-ST. PAUL, MN	1,481,050	1.469	Oct-88
15 CLEVELAND, OH	1,479,020	1.467	May-94
16 MIAMI-Ft. LAUDERDALE, FL	1,441,570	1.430	Nov-85
17 PHOENIX, AZ	1,390,750	1.380	May-89
18 DENVER, CO	1,268,230	1.258	Nov-85

BY DMA RANK 1999-2000 Rank Designated Market Area	Number of TV Households	Percent of U.S.	Date Metered
19 SACRAMENTO-STOCKTON-MODESTO, CA	1,159,820	1.151	May-88
20 PITTSBURGH, PA	1,135,290	1.126	May-95
21 ST. LOUIS, IL	1,114,370	1.106	May-89
22 ORLANDO-DAYTONA BEACH-MELBOURNE, FL	1,101,920	1.093	Feb-93
23 PORTLAND, OR	1,004,140	0.996	May-90
24 BALTIMORE, MD	999,200	0.991	Nov-92
25 SAN DIEGO, CA	980,620	0.973	Nov-92
26 INDIANAPOLIS, IN	963,320	0.956	Oct-89
27 HARTFORD & NEW HAVEN, CT	915,940	0.909	Jul-87
28 CHARLOTTE, NC	880,570	0.874	Jul-91
29 RALEIGH-DURHAM (FAYETTEVILLE), NC	858,490	0.852	Nov-98
30 NASHVILLE, TN	826,090	0.820	Jul-97
31 KANSAS CITY, MO	820,580	0.814	Nov-92
32 CINCINNATI, OH	820,000	0.814	Nov-89
33 MILWAUKEE, WI	815,640	0.809	May-89
34 COLUMBUS, OH	757,860	0.752	Oct-96
36 SALT LAKE CITY, UT	720,860	0.715	Nov-96
37 SAN ANTONIO, TX	684,730	0.679	Nov-90

BY DMA RANK 1999-2000 Rank Designated Market Area	Number of TV Households	Percent of U.S.	Date Metered
39 BIRMINGHAM (ANNISTON AND TUSCALOOSA), AL	667,650	0.662	Oct-98
40 MEMPHIS, TN	632,110	0.627	May-97
41 NEW ORLEANS, LA	629,820	0.625	Feb-97
42 NORFOLK-PORTSMOUTH-NEWPORT NEWS, VA	629,100	0.624	Apr-99
43 WEST PALM BEACH-Ft. PIERCE, FL	623,760	0.619	Feb-94
44 BUFFALO, NY	621,460	0.617	Apr-00*
45 OKLAHOMA CITY, OK	600,240	0.596	Apr-99
47 GREENSBORO-HIGH POINT-WINSTON SALEM, NC	592,770	0.588	Apr-98
48 LOUISVILLE, KY	576,850	0.572	Oct-99
49 ALBUQUERQUE-SANTA FE, NM	568,650	0.564	Oct-00*
50 PROVIDENCE-NEW BEDFORD, RI	565,230	0.561	Nov-98
52 JACKSONVILLE, FL	540,450	0.536	Jun-98
53 LAS VEGAS, NV	521,200	0.517	Oct-98
61 AUSTIN, TX	472,780	0.469	Apr-01*
TOTAL NUMBER OF TV HOUSEHOLDS IN 50 METERED MARKETS	66,918,280	66% of the U.S.	

Note: Rank and TV households are based on the 1999-2000 season. *New in 2000 and 2001.



Program	Network	Market	Local Rating	National U.S. Rating
PROVIDENCE	NBC	Providence	22.2	10.5
FRIENDS	NBC	New York	16.5	14.9
WEST WING	NBC	Washington D.C.	13.2	9.4
JUDGING AMY	CBS	Hartford	11.5	11.5
PRACTICE	ABC	Boston	13.8	11.0
WALKER TEXAS RANGER	CBS	Dallas	9.5	8.3
KING OF QUEENS	CBS	New York	10.8	8.9
FRASIER	NBC	Seattle	22.7	14.9
TIME OF YOUR LIFE	FOX	New York	5.9	5.7
PARTY OF FIVE	FOX	San Francisco	6.7	5.4
STEVE HARVEY	WB	Chicago	2.7	2.3
SPIN CITY	ABC	New York	7.2	8.1
ALLY McBEAL	FOX	Boston	11.4	8.6
ANGEL	WB	LA	8.0	4.0
E.R.	NBC	Chicago	25.0	20.4
WORLD SERIES GAME 4	NBC	New York	39.6	17.8
WORLD SERIES GAME 4	NBC	Atlanta	34.5	

Source Galaxy Explorer and Navigator, 9/30-10/27/99.

Home Town Loyalties

Are viewers influenced by the locale of a television program? The chart at left compares the national rating of a primetime series to the local rating the same program received in the market in which the fictional series takes place.

Local Television Viewing

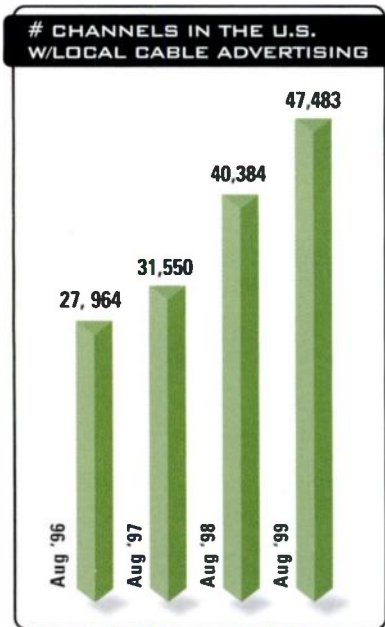
The most popular programs in a nationally drawn sample are not necessarily the top rated shows in each local market. Many factors impact a program’s performance in local markets, including regional characteristics as well as the strength and popularity of individual stations. The chart at bottom shows the top 10 primetime programs from the May 1999 survey period. The first row shows the national ranking and the next rows show rankings from randomly selected DMAs of all market sizes and regions.

Market	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10
TOTAL U.S.	E.R.	Frasier	Friends	CBS Sunday Movie	Touched by an Angel	Will & Grace	Veronica’s Closet	NBC Sunday Night Movie	60 Minutes	Law & Order
SEATTLE-TACOMA, WA	Frasier	Friends	E.R.	Home Improvement	Will & Grace	Veronica’s Closet	Just Shoot Me	Mad About You	Law & Order	Ally McBeal
SALT LAKE CITY, UT	E.R.	Friends	Will & Grace	Home Improvement	NBC Sunday Night Movie	Frasier	Law & Order	CBS Sunday Movie	Dateline	Veronica’s Closet
ORLANDO-DAYTONA BEACH-MELBOURNE, FL	E.R.	Home Improvement	Frasier	Friends	CBS Sunday Movie	Ally McBeal	Touched by an Angel	Jag	Veronica’s Closet	NBC Sunday Night Movie
HONOLULU, HI	E.R.	Ally McBeal	Frasier	X-Files	Martial Law	Touched by an Angel	CBS Sunday Movie	20/20-Fri.	Channel 2 News	Law & Order
FARGO-VALLEY CITY, ND	E.R.	Home Improvement	60 Minutes	Touched by an Angel	NBC Sunday Night Movie	CBS Sunday Movie	Friends	20/20-Wed.	Walker Texas Ranger	Frasier
ERIE, PA	E.R.	Home Improvement	Frasier	Everybody Loves Raymond	Becker	Friends	Drew Carey	Touched by an Angel	NYPD Blue	Law & Order
DES MOINES-AMES, IA	E.R.	Touched by an Angel	News Channel 8 at 6	Home Improvement	60 Minutes	CBS Sunday Movie	Frasier	Friends	NBC Sunday Night Movie	Everybody Loves Raymond
CHATTANOOGA, TN	E.R.	Home Improvement	Touched by an Angel	Frasier	Friends	CBS Sunday Movie	60 Minutes	NBC Sunday Night Movie	Veronica’s Closet	Will & Grace
BOSTON, MA	E.R.	Frasier	Friends	Will & Grace	Veronica’s Closet	The Practice	Law & Order	Home Improvement	60 Minutes	NYPD Blue

Source Total U.S. Nielsen Television Index Ranking Plus May 99 and DMAs Nielsen Galaxy ProFile, May 99 Excludes specials and programs designated as specials airing out of normal time period and programs which aired less than 2 of 4 weeks.

Local Cable Television

The local cable television industry continues to grow rapidly, not only in the number of different programming channels made available to subscribers, but also in the number of cable channels where local television advertising is inserted. Cable systems and interconnects have greatly expanded the amount of commercial time available for local advertisers on an increasing number of nationally recognized cable networks. In 1996 approximately 3,700 cable system headends offered advertising on an average of 7.5 different networks. This has grown to an average of just over 12 networks on 4,000 headends in October 1999. Some cable systems currently offer local advertising on as many as 40 different channels. With the potential for future digital video stream insertion, this exciting expansion is not over. The local group of Nielsen Homevideo Index (NHI) provides cable operators, interconnects and rep firms with cable television audience measurement services to help these customers respond to the needs of their advertisers and agencies.



Source: Nielsen Media Research FOCUS

Consolidation and acquisition have been buzzwords in the local cable industry, as Multiple System Operators (MSOs) continue to swap and aggregate cable system franchises. The clustering of cable system headends in market areas provides a simpler advertising sales environment for advertisers. NHI consistently tracks this activity, noting that the number of MSOs with 400,000+ cable subscribers has dropped from 30 in 1992 to 21 today. As recently as 1998, 80 percent of the cable subscribers were owned by the top 20 MSOs. Today 80 percent of subscribers are controlled by the 13 largest MSOs. Below are the largest cable systems and interconnects operating in the top television markets.

**TOP 10 TELEVISION MARKETS
LARGEST CABLE SYSTEM OPERATORS
OR LARGEST INTERCONNECTS**

Market Rank	Market	Cable System Operator or Interconnect	Subscribers
1	NEW YORK, NY	New York Interconnect*	3,435,006
2	LOS ANGELES, CA	Adlink*	2,706,955
3	CHICAGO, IL	AT&T Media Services	1,626,023
4	PHILADELPHIA, PA	The Philadelphia Interconnect*	1,853,287
5	SAN FRANCISCO-OAKLAND-SAN JOSE, CA	AT&T Media Services/Bay Cable*	1,489,500
6	BOSTON, MA	Greater Boston Cable Advertising*	1,581,915
7	DALLAS-Ft. WORTH, TX	AT&T Media Services*	597,645
8	WASHINGTON, DC	Greater Washington Interconnect*	1,014,404
9	DETROIT, MI	AdNex Detroit*	858,212
10	ATLANTA, GA	Cable Advertising of Metro Atlanta (CAMA)*	910,658

* denotes interconnect. Source: Nielsen Media Research FOCUS, December 1999.



Local Cable Television (cont.)

Nielsen Media Research aids cable operators and interconnect ad sales businesses by delivering household and demographic local cable ratings estimates for all measured markets. Cable television viewing estimates are geographically segmented by market and cable households, as well as within interconnect and cable system franchise areas. Local meter-based household ratings are available in 50 metered markets in the form of next day overnight ratings. Below are overnight local cable ratings for selected popular cable networks in the largest television markets. Ratings are expressed as percent of all homes in the market, and also as a percent of cable homes.



LOCAL RATINGS FOR THE TOP 10 TELEVISION MARKETS
TOTAL TV AND CABLE HOUSEHOLD UNIVERSE

Prime Time Monday-Sunday	ESPN		TBS		USA		NICK		TNT		Cartoon		Lifetime		A&E		MTV		Discovery	
	Total TV	Cable	Total TV	Cable	Total TV	Cable	Total TV	Cable	Total TV	Cable	Total TV	Cable	Total TV	Cable	Total TV	Cable	Total TV	Cable	Total TV	Cable
NEW YORK, NY	1.3	1.6	1.7	2.2	1.5	1.9	2.3	3.0	1.7	2.2	1.4	1.7	1.3	1.8	1.0	1.3	0.6	0.8	0.9	1.1
LOS ANGELES, CA	1.0	1.5	1.1	1.6	1.3	1.7	1.4	2.0	0.8	1.2	0.9	1.4	0.7	1.1	1.2	1.7	0.8	1.2	0.8	1.1
CHICAGO, IL	1.3	2.0	1.6	2.5	1.6	2.4	1.6	2.4	1.2	1.8	1.1	1.8	1.1	1.7	1.1	1.7	0.6	0.9	0.8	1.2
PHILADELPHIA, PA	2.2	2.7	2.1	2.6	1.7	2.1	1.9	2.3	1.5	1.9	0.7	0.9	1.1	1.4	1.2	1.4	0.8	1.0	1.0	1.2
SAN FRANCISCO-OAKLAND-SAN JOSE, CA	1.8	2.3	1.1	1.5	1.0	1.4	1.3	1.9	1.3	1.7	0.9	1.2	0.8	1.2	1.0	1.3	0.6	0.9	1.1	1.5
BOSTON, MA	1.5	1.7	1.5	1.9	1.5	1.9	1.7	2.0	1.2	1.5	0.3	0.3	1.1	1.4	1.1	1.3	0.8	1.0	0.6	0.8
DALLAS-Ft. WORTH, TX	1.6	2.5	1.2	1.9	1.4	2.3	0.8	1.4	0.9	1.6	1.8	3.3	0.5	0.8	0.6	0.9	0.4	0.7	0.7	1.2
WASHINGTON, DC	2.2	2.9	1.9	2.6	1.6	2.2	1.6	2.1	1.4	1.8	1.2	1.3	0.9	1.3	0.9	1.3	0.6	0.8	1.1	1.5
DETROIT, MI	1.6	2.2	1.7	2.3	1.8	2.5	1.4	1.9	1.3	1.8	1.2	1.7	0.9	1.1	1.1	1.4	0.7	1.0	0.8	1.0
ATLANTA, GA	2.3	3.0	n/a	n/a	1.6	2.2	1.4	1.9	1.6	2.0	1.9	2.5	1.5	2.0	1.1	1.6	0.6	0.8	0.8	1.1

Note: WTBS in Atlanta is an independent broadcast station. Source: Nielsen Media Research, Galaxy Navigator, November '99. N/A: not available

NIELSEN SPORTS MARKETING SERVICE

Formed in 1995, Nielsen Sports Marketing Service addresses the needs of the rapidly growing sports marketplace. Reporting includes information from Nielsen Media's local, national broadcast, cable and syndication services. Data are available on each individual event, for each broadcast season as well as sports season. Custom Research studies help marketers understand how sports fans spend their leisure time. For example, what they watch, their attitudes, likes and dislikes are becoming a large part of this growing industry. Championships, World Series, Super Bowls, All-Star Games and other marquee events continue to generate high ratings. The performance of individual sports events is influenced by the team match-ups along with local and regional appeal.



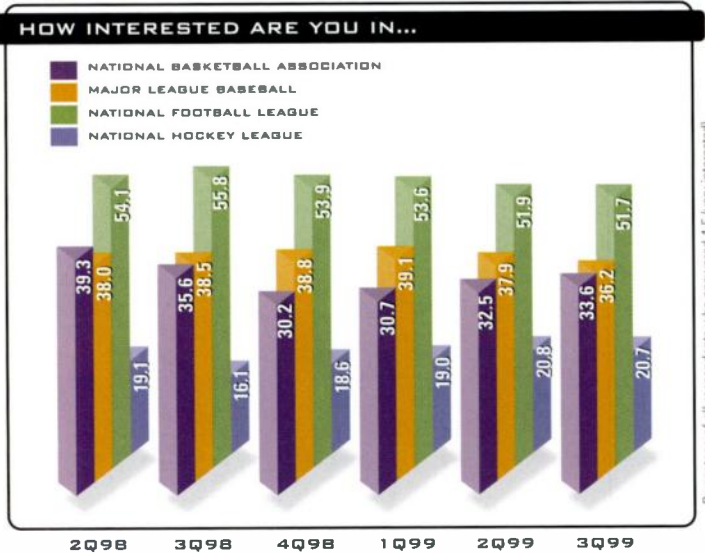
1998-99 BROADCAST SEASON TOP 25 SPORTING EVENTS

TELECASTS	Orig	Air Date	Day	Start Time	End Time	Total # of Minutes	Household Rating	Household Share	Avg. # of Households	Avg. # of Viewers
1 SUPER BOWL XXXIII	FOX	1/31/1999	.....S	6:26PM	9:50PM	204	40.2	61	39,992,000	83,722,000
2 AFC CHAMPIONSHIP ON CBS	CBS	1/17/1999	.....S	4:17PM	7:37PM	200	26.6	48	26,487,000	41,996,000
3 FOX NFC CHAMPIONSHIP	FOX	1/17/1999	.....S	12:35PM	4:25PM	230	25.7	54	25,501,000	38,218,000
4 FOX NFC WILDCARD GAME	FOX	1/03/1999	.....S	4:15PM	7:28PM	193	23.6	40	23,467,000	35,594,000
5 FOX NFC PLAYOFF-SUN	FOX	1/10/1999	.....S	4:15PM	7:23PM	188	21.4	39	21,234,000	31,839,000
6 AFC/NFC PLAYOFF GM2	ABC	1/02/1999	.....S	4:00PM	7:18PM	198	21.2	40	21,109,000	30,744,000
7 AFC DIVISIONAL PLAYOFF-SUN	CBS	1/10/1999	.....S	12:40PM	3:50PM	190	20.1	45	20,006,000	28,456,000
8 AFC DIVISIONAL PLAYOFF-SAT	CBS	1/09/1999	.....S	4:16PM	7:07PM	171	18.4	37	18,248,000	26,107,000
9 AFC WILDCARD PLAYOFF	CBS	1/03/1999	.....S	12:41PM	3:55PM	194	18.3	38	18,231,000	26,102,000
10 FOX NFC PLAYOFF-SAT	FOX	1/09/1999	.....S	12:35PM	3:39PM	184	18.2	42	18,100,000	25,587,000
11 AFC/NFC PLAYOFF GM1	ABC	1/02/1999	.....S	12:32PM	3:54PM	202	18.1	40	18,007,000	25,282,000
12 CBS NCAA BSKBL CHAMPSHIPS	CBS	3/29/1999	M.....	9:14PM	11:30PM	136	17.2	27	17,139,000	26,304,000
12 FIESTA BOWL	ABC	1/04/1999	M.....	8:14PM	11:50PM	216	17.2	26	17,081,000	26,112,000
14 NFL MONDAY NIGHT FOOTBALL	ABC	10/05/1998	M.....	8:22PM	11:03PM	161	16.8	27	16,712,000	23,945,000
15 FOX NFL SUNDAY-NATIONAL	FOX	11/01/1998	.....S	4:20PM	7:38PM	184	16.7	32	16,592,000	24,848,000
16 FOX WORLD SERIES GAME 4	FOX	10/21/1998	..W....	8:19PM	11:27PM	188	16.6	27	16,480,000	23,385,000
17 FOX NFL-THU	FOX	11/26/1998	...T....	4:15PM	7:54PM	219	16.5	43	16,442,000	32,681,000
17 CBS NFL NATIONAL	CBS	12/06/1998	.....S	4:25PM	7:48PM	184	16.5	33	16,367,000	22,793,000
19 NFL MONDAY NIGHT FOOTBALL	ABC	12/21/1998	M.....	8:22PM	11:33PM	191	16.3	27	16,244,000	23,759,000
20 CBS NFL NATIONAL	CBS	11/22/1998	.....S	4:16PM	7:51PM	186	16.2	32	16,099,000	23,101,000
21 NFL MONDAY NIGHT FOOTBALL	ABC	11/09/1998	M.....	8:22PM	11:21PM	179	15.6	25	15,551,000	22,543,000
21 CBS NFL SINGLE-THU	CBS	11/26/1998	...T....	12:35PM	4:04PM	209	15.6	42	15,499,000	26,660,000
23 NFL MONDAY NIGHT FOOTBALL	ABC	12/07/1998	M.....	8:21PM	11:35PM	194	15.4	25	15,332,000	21,736,000
23 FOX WORLD SERIES GAME 3	FOX	10/20/1998	...T....	8:16PM	11:41PM	205	15.4	25	15,326,000	21,973,000
25 NFL MONDAY NIGHT FOOTBALL	ABC	11/23/1998	M.....	8:22PM	11:45PM	203	15.1	24	14,964,000	20,680,000

Source: Galaxy Explorer, Nielsen Sports Marketing Service 9/1/98-8/31/99.

SportsQuest

SportsQuest is a syndicated service that provides comprehensive information on viewership, audience demographics, brand preferences, media interests and attitudes of sports fans across the U.S. and Canada. SportsQuest is a Nielsen Sports Marketing Service offering. Information from the SportsQuest national service is based on more than 3000 in-depth telephone interviews conducted each week with people all across the U.S. A local service also provides in-depth information on a growing number of U.S. and Canadian markets. Using SportsQuest information would help an advertiser determine the effects of a campaign, or better understand the demographics of audiences for football, baseball, basketball, hockey, auto racing, golf and other sports.



KEY SPORTING EVENTS 1998-99 SEASON

Event	Net	# of Telecasts	Day	Date	Time	# of Minutes	Household Rating	Household Share	Avg. # of Households
KENTUCKY DERBY	ABC	1	SAT	5/2/99	4:30PM	92	6.3	19	6,254,000
PREAKNESS	ABC	1	SAT	5/16/99	4:30PM	90	3.4	10	3,423,000
BELMONT STAKES	ABC	1	SAT	6/6/99	4:30PM	92	6.0	17	5,958,000
WOMEN'S WORLD CUP SOCCER FINAL	ABC	1	SAT	7/10/99	3:30PM	196	11.4	31	11,307,000
MASTERS FINAL ROUND	CBS	1	SUN	4/12/99	4:00PM	217	10.1	21	9,993,000
NHL ALL-STAR GAME	FOX	1	SAT	1/24/99	4:22PM	162	2.2	5	2,219,000
NFL AFC/NFC PRO BOWL	ABC	1	SUN	2/7/99	6:00PM	210	7.9	13	7,887,000
MLB ALL-STAR GAME	FOX	1	TUE	7/13/99	8:51PM	189	12.0	22	11,890,000
US OPEN GOLF-FINAL ROUND	NBC	1	SUN	6/21/99	12:30PM	395	6.8	19	6,806,000
US OPEN TENNIS-MEN'S FINAL	CBS	1	SUN	9/13/99	4:23PM	157	2.7	6	2,690,000
PGA CHAMPIONSHIP-FINAL ROUND	CBS	1	SUN	8/15/99	1:30PM	303	6.9	18	6,821,000
DAYTONA 500	CBS	1	SUN	2/14/99	12:00PM	240	9.5	25	9,509,000
INDIANAPOLIS 500	ABC	1	SUN	5/30/99	12:00PM	216	5.5	18	5,482,000
1998 WORLD SERIES	FOX	4	VAR	Oct-98	VAR	834	14.1	24	14,040,000
1999 NBA FINALS	NBC	5	VAR	Jun-99	VAR	820	11.3	21	11,206,000
1999 STANLEY CUP FINALS	FOX	3	VAR	Jun-99	VAR	1870	3.4	6	3,379,000
SUPER BOWL XXXIII	FOX	1	SUN	1/31/99	6:26PM	204	40.2	61	39,992,000
1999 FIESTA BOWL	CBS	1	MON	1/4/99	8:14PM	216	17.2	26	17,081,000
1999 NCAA MEN'S FINAL FOUR	CBS	2	SAT	3/27/99	VAR	267	10.0	21	9,997,000
1999 NCAA MEN'S CHAMPIONSHIP	CBS	2	MON	3/29/99	9:14PM	136	17.2	27	17,139,000

Source: Nielsen Sports Marketing Service

Sports Advertising

The top 10 sports advertisers spent approximately \$1 billion during 1998 and approximately \$650 million during the first nine months of 1999 on national Broadcast networks, Cable networks and Syndication commercial sponsorships.

LEADING SPORTS ADVERTISERS JANUARY-SEPTEMBER 1999

	Dollars Spent Jan. 99 - Sept. 99
1 ANHEUSER-BUSCH, INC	\$125,198,260
2 CHEVROLET MOTOR DIVISION	\$81,586,260
3 NIKE, INC	\$75,157,600
4 FORD MOTOR COMPANY	\$66,221,320
5 AMERICAN TELEPHONE & TELEGRAPH CO	\$59,847,630
6 COORS BREWING COMPANY	\$51,523,890
7 MILLER BREWING COMPANY	\$50,595,150
8 AMERICAN HONDA MOTOR COMPANY, INC.	\$48,098,610
9 VISA INTERNATIONAL	\$46,723,330
10 DODGE CAR-TRUCK DIVISION	\$44,435,130
TOTAL SPENT BY TOP 10 SPORTS ADVERTISERS - JAN-SEPT 99	\$649,387,180

Source: Ad*Views Finals Data

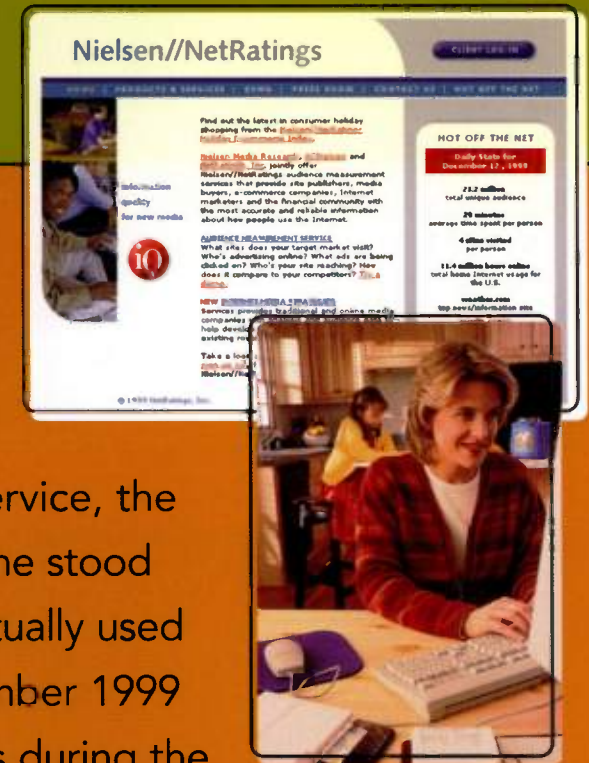
LEADING SPORTS ADVERTISERS-1998

	Dollars Spent in 1998
1 ANHEUSER-BUSCH, INC	\$187,061,690
2 FORD MOTOR COMPANY	\$128,210,350
3 CHEVROLET MOTOR DIVISION	\$112,087,410
4 NIKE, INC	\$110,421,920
5 MILLER BREWING COMPANY	\$106,514,420
6 VISA INTERNATIONAL	\$87,211,380
7 DODGE CAR-TRUCK DIVISION	\$82,322,140
8 INTL BUSINESS MACHINE CORP	\$80,475,430
9 AMERICAN TELEPHONE & TELEGRAPH CO	\$74,427,260
10 PROCTER & GAMBLE COMPANY	\$59,324,840
TOTAL SPENT BY TOP 10 SPORTS ADVERTISERS-1998	\$1,028,056,840

Source: Ad*Views Finals Data

INTERACTIVE SERVICES

The Internet has continued to expand rapidly as a communication, education and entertainment medium, and has become a significant advertising vehicle and commercial channel. In February 1999, when Nielsen Media Research and NetRatings, Inc. launched the Nielsen//NetRatings Internet audience and advertising measurement service, the Universe Estimate (UE) for persons in the U.S. with Internet access at home stood at 97.1 million (opposite page, left table). The number of people who actually used the Internet from home during the same month was 59 million. In September 1999 the UE had grown to 110 million persons, and the number of active users during the same month was 65 million. From the end of February 1999 to the end of September 1999, the number of people with access to the Internet from U.S. homes increased by more than 1.8 million per month.



During September 1999, the average user spent nearly 7 hours, 31 minutes on-line, and the average session lasted 28 minutes. In February 1999, these measurements were approximately 7 hours, 28 minutes, and 28 minutes, respectively. At the end of September, approximately 41 million U.S. households had Internet access, an increase of more than 5 million households since the beginning of the year.

With the number of Internet-enabled households and users continuing to expand, advertisers and their agencies have sought to use the "new media" to establish or extend brands, and to capture new users and business. Industry estimates indicate that Internet advertising was approximately \$900 million in 1997 and \$1.9 billion in 1998. The Internet Advertising Bureau reported Internet advertising in the first quarter of 1999 was nearly \$700 million, two times the advertising expenditure from the first quarter of 1998. As reported by Nielsen//NetRatings, the list of leading advertisers on the Internet in September 1999 (below middle) is top heavy with Internet players and service providers.

QUICK LOOKS—WEB USAGE
FEBRUARY–SEPTEMBER 1999

	February	September
NUMBER OF SESSIONS PER MONTH	16	16
NUMBER OF UNIQUE SITES VISITED	15	11
PAGE VIEWS PER MONTH	313	409
PAGE VIEWS PER SURFING SESSION	19	26
TIME SPENT PER MONTH	7: 28: 16	7: 30: 51
TIME SPENT DURING SURFING SESSION	0: 28: 01	0: 28: 18
DURATION OF A PAGE VIEWED	0: 01: 28	0: 01: 05
AVERAGE CLICK RATE FOR TOP BANNERS	0.15	0.56
ACTIVE INTERNET UNIVERSE	58,992,285	64,953,584
CURRENT INTERNET UNIVERSE ESTIMATE	97,128,544	109,993,829

Source: Nielsen//NetRatings

BANNERTRACK—ADVERTISING BY COMPANY
SEPTEMBER 1999

Advertiser	Impressions	Rank	Unique Audience	Reach %
TRUSTE	944,965,715	1	16,545,693	25.47
MICROSOFT	466,205,023	2	28,417,696	43.75
AMAZON	273,170,131	3	28,526,244	43.92
YAHOO!	215,654,581	4	19,440,483	29.93
AMERICA ONLINE	145,669,671	5	20,822,784	32.06
NEXT CARD	140,178,919	6	15,418,168	23.74
NETSCAPE	134,718,960	7	17,913,751	27.58
SEXTRACKER	104,925,293	8	5,554,137	8.55
AT&T	104,436,527	9	15,418,339	23.74
CONOW	102,621,787	10	17,324,905	26.67

Source: Nielsen//NetRatings

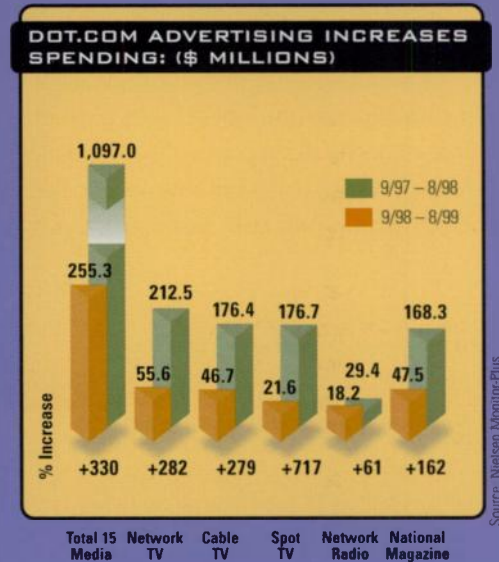
BANNERTRACK—ADVERTISING BY DOMAIN
SEPTEMBER 1999

Domain	Impressions	Rank	Unique Audience	Reach %	# of Banners
YAHOO.COM	1,750,058,867	1	25,106,889	38.65	1922
EBAY.COM	1,036,955,592	2	6,700,993	10.32	224
AOL.COM	481,213,420	3	17,787,625	27.39	977
MSN.COM	447,057,038	4	14,409,585	22.18	1201
NETSCAPE.COM	265,585,099	5	12,168,008	18.73	985
GO.COM	232,651,746	6	10,025,015	15.43	838
HOTBOT.COM	154,179,288	7	4,495,941	6.92	287
INFOSPACE.COM	128,696,629	8	3,833,147	5.9	163
SNAP.COM	99,665,409	9	4,644,607	7.15	391
LOOKSMART.COM	91,945,825	10	4,676,513	7.2	426

Source: Nielsen//NetRatings

COMPETITIVE ADVERTISING INTELLIGENCE

In addition to providing television program audience estimates, Nielsen Media Research has developed the Monitor-Plus service to provide a range of information on advertising across 15 media types*—including television, radio, magazines, and newspapers. The service enables marketers and their agencies to assess advertising trends, gauge the performance of their own campaigns and track the advertising activity of their competitors. In the case of television, Monitor-Plus provides access to audience exposures by brand. By doing so, the ambiguity associated with estimated expenditures can be replaced by a more accurate depiction of how brands are being promoted in the marketplace.



*The 15 media types reported by Monitor-Plus are: Cable TV, Hispanic TV, Network TV, Spot TV, Syndicated TV, Spot Radio, Network Radio, Local Newspaper, Local Sunday Supplement, National Newspaper, National Sunday Supplement, Local Magazine, National Magazine, FSI Coupon (Free Standing Insert), and Outdoor.

A significant trend in 1999 is the emergence of "Dot.com" advertising as a major new category and source of advertising revenue for "off-line" media. Traditional advertisers and Internet pure plays have turned to off-line media, including television, radio, newspapers and magazines to promote their Internet sites and capabilities. Dot.com advertising is defined as advertising done by a company to promote its Internet capabilities or to encourage people to visit a Web site for news, information, entertainment, or to buy products and services.

From September 1998 through August 1999, Dot.com advertising passed the \$1 billion mark for the first time and, also for the first time, Dot.com advertising ranked in the top ten advertising categories (top right). The nearly \$1.1 billion in such advertising represented a 330 percent increase from the \$255 million spent promoting Internet services from September 1997 through August 1998. The bar chart on the opposite page shows the total increase in Dot.com advertising between 1997-'98 and 1998-'99 across the 15 media reported by Monitor-Plus. The chart also shows period-to-period increases within the leading media categories being used to promote Internet services.

A comparison of Dot.com advertising for the month of September 1998 vs. September 1999 also reveals dramatic changes. In September 1998, there were more than 18,000 advertisements representing advertising spending of \$36.7 million. In September 1999, there were more than 144,000 advertisements representing advertising spending \$215.1 million.

The top table, at right, shows the leading advertising categories for 1997-'98 and 1998-'99, and marks the emergence of Dot.com advertising as one of the top ten categories. As advertisers increased their use of off-line media to promote brand awareness and increase traffic to their Web sites, spending has been concentrated in several TV and print media categories. The Media Category table (middle right) shows the top six media categories Dot.com advertisers used during September 1999. Together these categories account for 88 percent of the \$215.1 million spent by Dot.com advertisers in off-line media during the month.

Two on-line trading companies — Ameritrade and E*Trade — led the list of Dot.com advertisers in off-line media in September 1999. The bottom table, at right, shows the top ten Dot.com advertisers for the month and their level of activity across the 15 off-line media reported by Nielsen Monitor-Plus.

LEADING ADVERTISER CATEGORIES SPENDING IN MILLIONS

Total 15 Media*		9/97-8/98	9/98-8/99
AUTOS		\$4,005.6	AUTOS \$4,771.9
RESTAURANT		\$3,284.2	RESTAURANT \$3,633.2
STORE-DEPT.		\$2,935.6	STORE-DEPT. \$3,175.8
AUTO DEALERSHIP		\$2,621.1	AUTO DEALERSHIP \$2,783.4
MOTION PICTURE		\$2,216.0	MOTION PICTURE \$2,328.6
TELEPHONE SERVICES		\$1,628.3	TRUCKS \$2,253.5
TRUCKS		\$1,549.9	TELEPHONE SERVICES \$2,162.6
AUTOS-DLR ASSN		\$1,043.6	PRESCRIPTION DRUGS \$1,330.3
PRESCRIPTION DRUGS		\$943.5	DOT-COMS \$1,097.0
STORE-FURNITURE		\$922.4	STORE-FURNITURE \$1,063.0

Spending: (\$ Millions) Source: Nielsen Monitor Plus. *The 15 media types reported by Monitor-Plus are Cable TV, Hispanic TV, Network TV, Spot TV, Syndicated TV, Spot Radio, Network Radio, Local Newspaper, Local Sunday Supplement, National Newspaper, National Sunday Supplement, Local Magazine, National Magazine, FSI Coupon (Free Standing Inserts), and Outdoor.

Media Category	Cost (\$000)
NETWORK TV	\$36,833
CABLE TV	\$35,591
NATIONAL MAGAZINES	\$33,397
SPOT RADIO	\$29,912
SPOT TV	\$29,785
NATIONAL NEWSPAPERS	\$23,162

Source: Nielsen Monitor-Plus

Advertiser	Expenditure (\$000)
AMERITRADE HOLDING CORP.	\$16,972
E*TRADE SECURITIES	\$8,690
CNET INC.	\$7,907
IVILLAGE	\$5,892
TMP WORLDWIDE	\$4,767
VALUE AMERICA INC.	\$4,647
SAP AG	\$4,363
PRICELINE.COM INC.	\$4,018
FMR CORP.	\$3,427
PETSMART INC.	\$3,048

TV VIEWING IN CANADA

Canada is larger than the United States, but has only a bit more than a tenth of the American population—mostly concentrated along its southern border. It has two national conventional television networks, CBC and CTV, as well as several “regional networks” with coverage areas about the size of a province.



There are two official languages in Canada—English and French. Nearly all of Canada’s French-speaking population, called Francophones, is concentrated in the province of Quebec, while the rest of Canada predominantly speaks English. French language and culture are strongly protected in Quebec, with regulatory laws limiting the amount of English-language television programming.

In Canada, cable networks are called “specialty networks”, referring to their specialized program content. Most Canadians can receive U.S. broadcast and cable networks through their cable connection. Locations near the border can also receive U.S. stations.

Nielsen Media Research uses the people meter methodology to measure Canada’s national television market. People meters are also used to measure the local markets of Toronto, located in the province of Ontario; and Vancouver, located in the West Coast province of British Columbia. Nielsen Media Research does not use the diary methodology in Canada.

Nielsen Media Research also measures the regional television market of Ontario, which receives spill from the large stations located in the massive Toronto local market. Quebec regional networks are reported as part of the national people meter panel.

Top Programs

With most of the population nudged against the U.S. border, English Canada receives and watches a great deal of American programming. A glance at an English top program list reveals that nearly all of them are American productions. While American networks are available in Canada on cable, the most popular American programming is purchased by and viewed on Canadian networks such as CTV and Global. The CBC is a Crown Corporation, subsidized heavily by the government. Its mandate is to provide more “Canadian grown productions” such as the popular “Hockey Night in Canada”.

TOP 10 REGULAR PROGRAMS
AVERAGE MINUTE AUDIENCE 98/99 SEASON
NATIONAL ENGLISH NETWORKS*

Rank	Days	Time	Program	Network	Adults 25-54
1	MON	9PM	ALLY MCBEAL	CTV	1,032,000
2	THU	10PM	E.R.	CTV	1,005,000
3	MON	10PM	L.A. DOCTORS	CTV	769,000
4	WED	10PM	LAW AND ORDER	CTV	713,000
5	WED	9PM	DREW CAREY	CTV	662,000
6	TU/WE	9:30PM	WHOSE LINE/ANYWAY	CTV	648,000
7	WED	9:30PM	SECRET LIVES OF MEN	CTV	603,000
8	M/S/S	7PM	HOCKEY NIGHT IN CANADA	CBC	596,000
9	MON	8PM	MELROSE PLACE	CTV	580,000
10	TUE	8PM	HOME IMPROVEMENT	CTV	550,000

*Excludes all Canadian Regional Networks.

Canadian Content

Canadian cultural content is a sensitive cultural issue in a country situated in such close proximity to the United States. In response, the CRTC, Canada’s telecommunications regulatory body, limits the amount of foreign television content and American networks available in Canada.

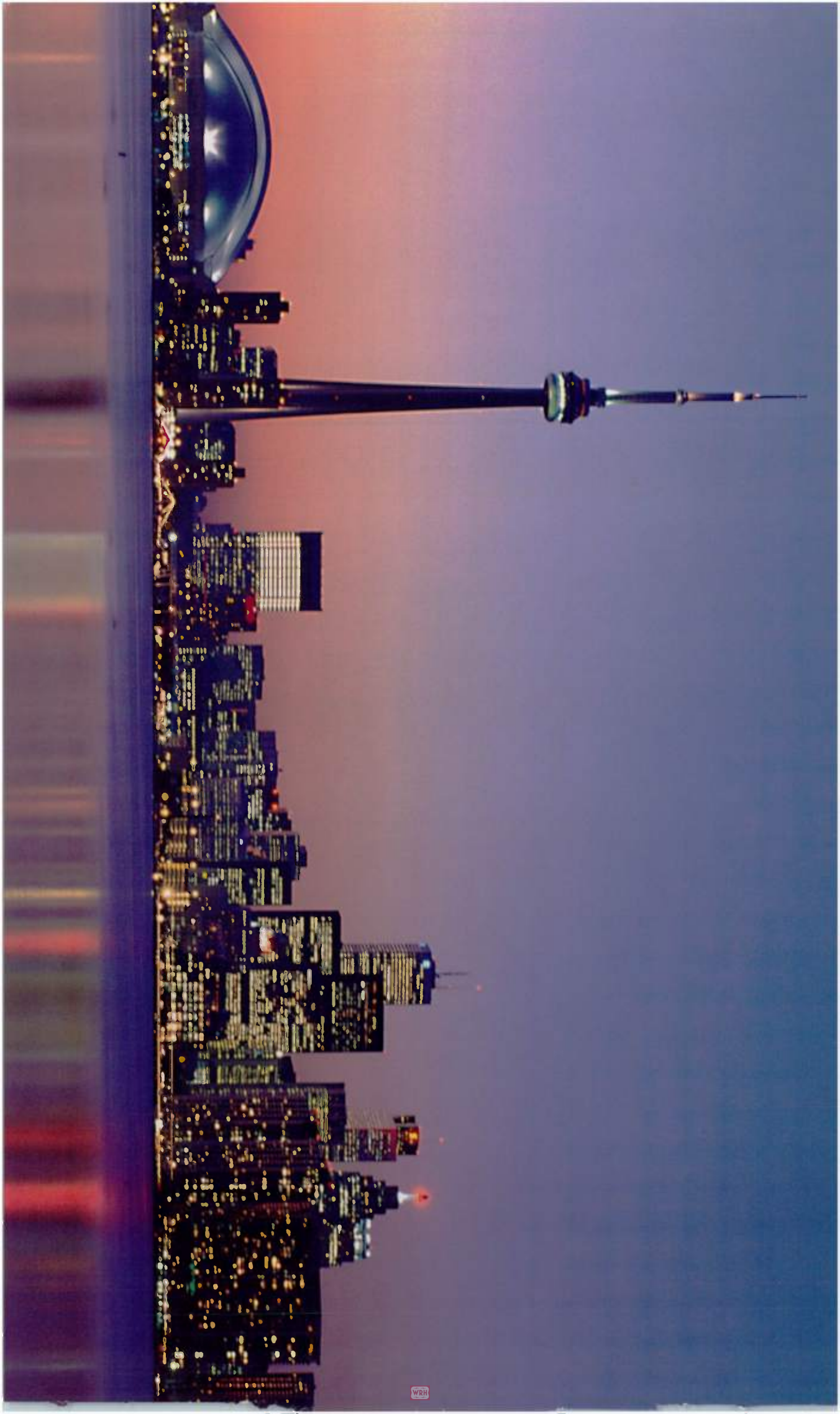
TV Viewing in the Province of Quebec

Ensuring Canadian content isn’t as much of an issue in a province where the predominant language is French. The Quebecois have developed their own media celebrities and television programming, ensuring that their language and culture are preserved.

Because there are relatively few French-language networks, the audience is much less fragmented than in the rest of Canada. This can be seen with the program “La Petite Vie”, which generates an audience almost entirely from Quebec that is nearly 50% higher than the number one show in English Canada. See charts below.

TOP 10 REGULAR PROGRAMS
AVERAGE MINUTE AUDIENCE 98/99 SEASON
NATIONAL FRENCH NETWORKS

Rank	Days	Time	Program	Network	Adults 25-54
1	MON	7:30PM	PETITE VIE (LA)-Fall '98	R-C	1,522,000
2	MON	9PM	OMERTA III	R-C	1,046,000
3	MON	7:30PM	PETITE VIE (LA)- Wtr/Spr '99	R-C	923,000
4	MON	8PM	4 ET DEMI	R-C	911,000
5	WED	8PM	LE RETOUR	TVA	786,000
6	TUE	8PM	HISTOIRES DE FILLES	TVA	766,000
7	THU	7:30PM	UN GARS UNE FILLE	R-C	714,000
8	TU/TH	8:30PM	KM/H	TVA	666,000
9	THU	9PM	JULIETTE POMERLEAU	TVA	663,000
10	TUE	9PM	LES MACHOS	TVA	618,000



Across Canada, Females tend to watch the highest amount of television, throughout both the entire day and in primetime.

Within Ontario and Toronto, the number of hours viewed for Viewers 2+ closely matches the National average. For Children 2-11, however, viewing levels are significantly higher.

The province of Quebec has the highest level of viewing within Canada across Viewers. "Home-grown" French Canadian productions help contribute to this strong level of television viewing.

AVERAGE WEEKLY HOURS PER PERSON
MARCH 1999*

Daypart/Demographic	Total Canada (Hrs:Min)	Province of Ontario (Hrs:Min)	Local Toronto Market (Hrs:Min)	Province of Quebec (Hrs:Min)
Mon-Sun 8AM-6AM				
PERSONS 2+	25:16	25:22	25:18	26:48
CHILDREN 2-11	16:57	17:23	18:29	16:57
TEENS 12-17	16:45	15:01	15:05	21:06
FEMALE 18+	28:45	29:09	29:32	29:51
MALES 18+	26:31	26:30	25:27	28:17
Mon-Sun 6PM-12 MID				
PERSONS 2+	13:09	13:02	13:09	14:18
CHILDREN 2-11	6:03	6:21	7:04	6:12
TEENS 12-17	8:33	7:30	7:17	10:33
FEMALE 18+	15:10	15:17	15:33	16:12
MALES 18+	14:38	14:16	14:01	16:00

*March 1-28/99 (4 week average)

Population in Canada

While Canada's 30 million population is less than 12 percent of the U.S., the age distribution and number of persons per household between the two countries is strikingly similar.

38 percent of Canada's population resides in Ontario with 11.4 million persons. Toronto is the largest city in Canada with 6 million people, representing more than 20 percent of Canada.

The Quebec province, with its unique Francophone population, has a population of 7.3 million, and is the second largest province in Canada.

UNIVERSE ESTIMATES
1999/2000 SEASON

Demographic	Total U.S. (Millions)	Total U.S. %	Total Canada (Millions)	Total Canada %	Province of Ontario (Millions)	Local Toronto Market (Millions)	Province of Quebec (Millions)
HOUSEHOLDS	100.8		11.9		4.4	2.3	3.1
PERSONS 2+	259.9	100	30.1	100	11.4	6.3	7.3
CHILDREN 2-11	39.8	15	4.0	13	1.6	0.8	0.9
TEENS 12-17	22.5	9	2.5	8	0.9	0.5	0.6
FEMALE 18+	103.0	40	12.0	40	4.6	2.5	3.0
MALES 18+	94.7	36	11.6	39	4.4	2.4	2.8
PERSONS PER HOME	2.58		2.53				

Source: Nielsen Media Research estimates

GLOSSARY OF MEDIA TERMS



TELEVISION DEFINITIONS

Universe Estimate (U.E.)

Total persons or homes in a given population, e.g., TV households in the U.S.

Rating % (Average Audience)

The percent of the universe of households or persons viewing a TV program during the average minute. (All ratings/average audience data shown in this report are based on viewership during the average minute, unless otherwise noted.)

$$\text{Rating \%} = \frac{\text{Audience}}{\text{Universe Estimate}}$$

Share (of Audience)

The percent of TV sets in use (or persons viewing) tuned to a program.

$$\text{Share} = \frac{\text{Rating}}{\text{HUT}}$$

Average Audience Projection/Impression

The audience expressed in numeric rather than percent form.

$$\text{Projection} = \text{Rating} \times \text{Universe}$$

TV Usage

Households Using Television (HUT)
and Persons Using Television (PUT)

$$\text{HUT \%} = \frac{\text{Number of Homes with TV Sets in Use}}{\text{Total HH Universe Estimate}}$$

$$\text{PUT \%} = \frac{\text{Number of Persons Viewing TV}}{\text{Total Persons Universe}}$$

Total U.S. Rating %

Average Audience in percent of total U.S. TV households.

Cable/Coverage Area Rating %

Average Audience in percent of homes able to receive an individual cable network or superstation.

$$\text{Coverage Area Rating \%} = \frac{\text{Average Audience}}{\text{Coverage Area U.E.}}$$

Weighted Average

Calculated by multiplying each program's rating by its duration, summing these products and dividing the total by the sum of the duration.

Coverage

The percent of TV households that could receive a program. It's the *ability* to view, not actual viewing.

Station Count

The number of stations transmitting the program.

Average Hours of Viewing

HUT/PUT converted to the average hours of viewing per home or per person.

The two measurements are simply different ways to express the same statistic.

Avg. Hours = Duration of the period x HUT%

For example, the Mon-Sun 7-11pm duration is 7 days x 4 hours or 28 hours.

If we assume a 70% HUT...

28 Hours x .70 = 19.6 hours/week.

Average Hours: Minutes would be:

19 + (.6 x 60min.) = 19 hours, 36 minutes.

Gross Average Audience (GAA Rating)

The sum of the percent of households or persons tuning or viewing during the average minute of each telecast of the program, including repeat telecasts during the report interval. Duplicated tuning and viewing to the same program (or its repeat telecast) by the same household, during the report period is counted each time.

Gross Rating Points (GRPs)

The sum of all ratings for all programs in a schedule.

Gross Impressions (IMP)

The GRPs expressed in numeric rather than percent form.

Impressions = GRPs x Universe

Viewers Per Viewing Household (VPVH)

The number of viewing persons per tuning household. Usually reported as "per 1,000 viewing households."

$$\text{VPVH} = \frac{\text{Persons Projection}}{\text{Household Projection}}$$

Reach

The number of different homes/people exposed at least once to a program or commercial across a stated period of time. Also called the cumulative (cume) or unduplicated audience.

Average Frequency

The average number of times a home/person is exposed to programs or commercials.

Frequency Distribution

An array of reach according to the level of frequency delivered to each group.

Cost Per Thousand (CPM)

The cost to deliver 1,000 people or homes.

$$\text{CPM} = \frac{\text{Media Cost}}{\text{Impressions}} \times 1,000$$

Cost Per Rating Point (CPP)

The cost to deliver a single rating point.

$$\text{CPP} = \frac{\text{Average Unit Cost}}{\text{Rating \%}} \quad \text{or} \quad \frac{\text{Total Schedule Cost}}{\text{GRPs}}$$

INTERNET DEFINITIONS

Unique Audience

The number of unique individuals that have gone to the site at least once in the reporting period.

Reach % (Active)

The number of unique Web users seeing a Web site one or more times during a reporting period. The active reach is expressed as a percentage of the total active Web population for the reporting period.

Reach % (Universe)

The number of unique Web users seeing a Web site one or more times during a reporting period. The universe reach is expressed as a percentage of the total Web population for the reporting period.

Page Views

The total number of times a Web page has been successfully served to the U.S. Web population. In order to be counted as a page view, the Web page has to successfully load on a user's browser. This includes page views that are accessed from the user's local cache. Any Web surfer can view a page many times.

Visits Per Person

The average number of visits each unique person has to a site during the reporting period. A visit is defined as a consecutive period of time when a panel member is registering page hits on a Web site.

Pages Per Person

Average number of pages each unique visitor has viewed for the listed site. This measure can help determine how many pages a person views per visit to a site, and thus indicate their level of interest in the particular site.

Time Per Person

Average time each unique visitor has spent at a given site during the reporting period.

Impressions

The total number of times an advertising banner has been served to the Web population. In order to be counted as an impression, the banner has to successfully load on the user's browser.

Click Rate

Indicates the number of times which an advertisement banner was clicked on.