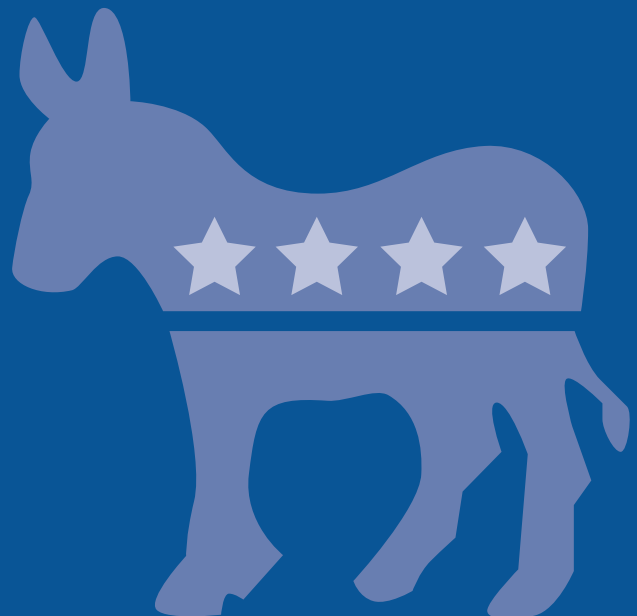
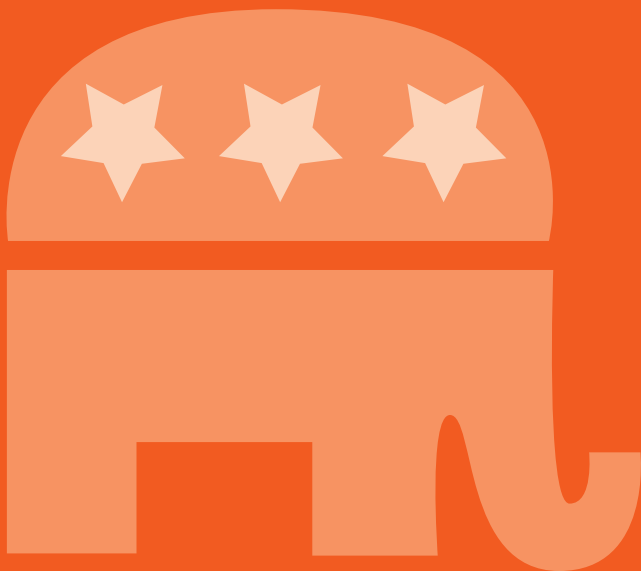


Nielsen
Examines the
TV Viewership to
the Presidential
and VP Debates

Sept/Oct 2008



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Nielsen Examines TV Viewership to the Presidential and VP Debates, September/October 2008

As the race to the White House continues, two of the four scheduled debates have been telecast delivering significant viewership. The first debate between presidential hopefuls Sen. Barack Obama of Illinois and Sen. John McCain of Arizona was telecast live on Friday, September 26, 2008 from approximately 9:00 to 10:45 PM EST. The sole Vice Presidential debate between Sen. Joseph Biden of Delaware and Governor Sarah Palin of Alaska aired live on Thursday, October 2, 2008 from approximately 9:00 to 10:30PM EST. The same eleven ad-supported Broadcast and Cable networks covered each event.

The following analysis from The Nielsen Company examines the combined delivery for both debates across all channels and provides a breakdown of their viewer characteristics. Also, a snapshot of the debates' local rating performance provides insight as to the top and bottom ranked metered markets.

Key findings from The Nielsen Company:

- The Vice Presidential debate (41.7 HH rtg) over-delivered the first Presidential debate (31.6 HH rtg) by 32% among homes and 33% among total persons. Note that TV usage was 14% stronger among homes on the Thursday night of the VP debate versus the Friday night of the first Presidential election (69.3 HUT vs. 60.7 HUT).
- Sixty-one percent of all U.S. households tuned in to at least one of the 2008 debates thus far. Nearly half of all homes (49.8%) viewed at least 6 minutes of the VP debate last Thursday, up from the first Presidential debate that reached 41.5% of HHs.
- 11.2% of all households tuned to just the Presidential debate, and 19.5% tuned to just the VP debate. Another 30.3% of all households tuned to both debates.
- Breaking down the minute-by-minute ratings, household viewership was very steady throughout both the Presidential debate and the VP debate.
- P55+ made up the largest portion of the debate audience (42-46%), although each of the younger demos did compile a slightly larger piece of the audience for the VP debate vs. the Presidential debate.
- For the most part, the debates had similar audiences in that their viewers were more likely to be white, have higher incomes (100K+), and have a higher education (4+ yrs college).
- Head of homes that are African Americans made up a larger portion of the Presidential debate audience (14.0%) than the VP debate audience (12.3%) as well as the TV norm (12.2%).
- Hispanics were less likely to watch the debates, as Hispanic households made up only 6.3%-6.5% of the overall debates' audience, strongly under the TV norm of 11.1% homes headed by Hispanics.
- The debates have drawn more viewers to their TV sets, as TV usage was stronger than the norm for each respective night of the debates.
- Across the 55 metered markets, Baltimore had the most tuning for each of the debates. St. Louis, host city for the Vice Presidential debate, saw strong viewership posting a 77.9 share.

See below for more details.



National Delivery – Ratings

Nationally, the first Presidential debate produced a combined rating of 31.6 among households, translating to 36.2 million homes on average. Among total viewers (P2+), the debate garnered an 18.1 gross rating or 52.4 million average viewers.

The Vice Presidential debate delivered a combined rating of 41.7 among homes, translating to 47.8 million households on average. Among total viewers, the VP debate posted a 24.0 gross rating or 70.0 million average viewers.

The VP debate over-delivered the first Presidential debate by 32% among Households and 33% among total persons. Note that TV usage was 14% stronger among homes on the Thursday night of the VP debate versus the Friday night of the first Presidential debate (69.3 HUT vs. 60.7 HUT). When looking at total available audience (share), the VP debate with a 60.2 HH share out-performed the Presidential debate (52.0 HH share) by 16%.

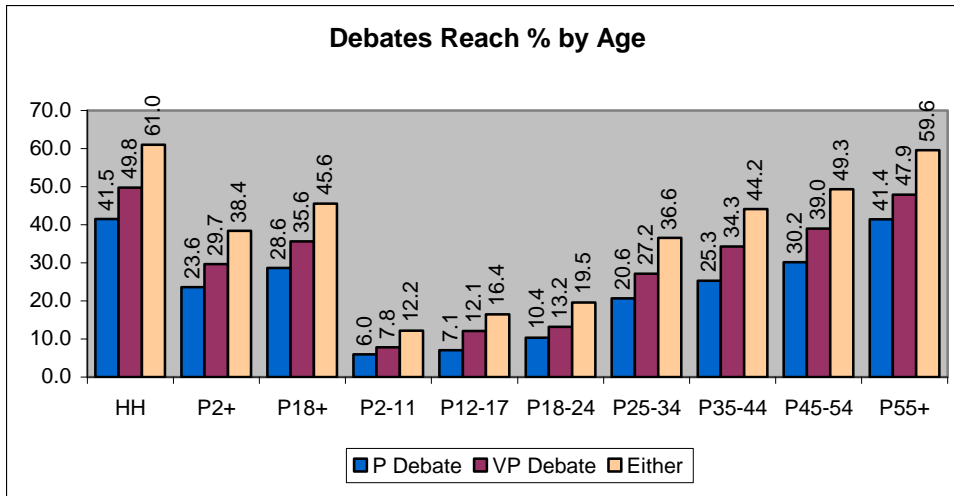
It is interesting to note that homes headed by African Americans over-delivered the total persons rating for the Presidential debate, but not so for the VP debate.

Presidential Debate 1 and Vice Presidential Debate - 2008				
Sum of Networks (L+SD)				
	Pres Debate 1 - 9/26/08		VP Debate 10/2/08	
	Rating	Projection	Rating	Projection
All Households	31.6	36,224,000	41.7	47,795,000
Persons 2+	18.1	52,418,000	24.0	69,989,000
Males 18+	20.5	22,250,000	28.1	30,409,000
Females 18+	23.3	27,093,000	30.7	35,706,000
African-American P2+	19.5	7,174,000	21.8	8,067,000
Hispanic P2+	8.2	3,456,000	10.2	4,394,000
White P2+	19.4	41,079,000	26.7	56,779,000

Combined Reach of Debates

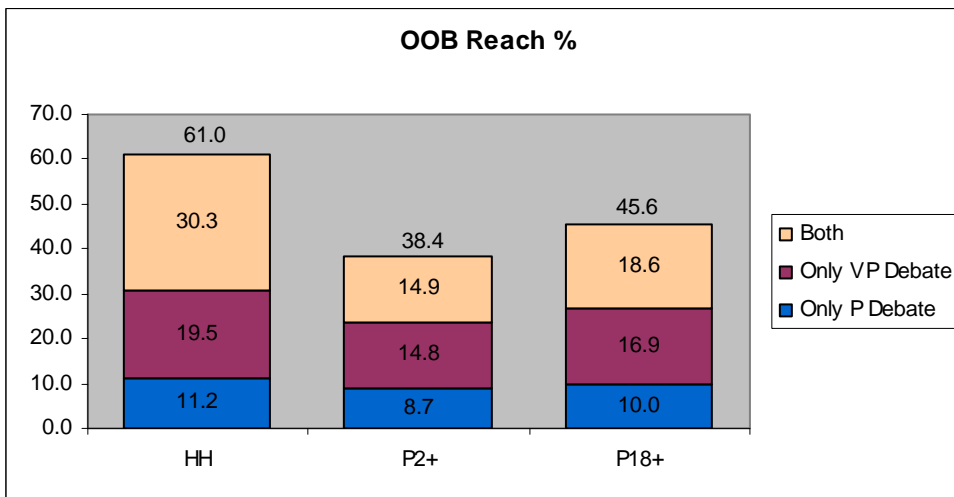
Sixty-one percent of all U.S. households tuned in to at least one of the 2008 debates thus far. Nearly half of all homes (49.8%) viewed at least 6 minutes of the VP debate last Thursday, up from the first Presidential debate that reached 41.5% of HHs. The VP debate saw larger audiences than the Presidential debate across all ages, as well. This isn't too surprising given the buzz surrounding the VP debate and its larger available audience on Thursday night.

The cumulative audience for each debate increased with age; the debates reached just 19.5% of the youngest voting segment of 18-24, however it reached nearly 3 times (59.6%) that of the oldest segment of 55+ voters.



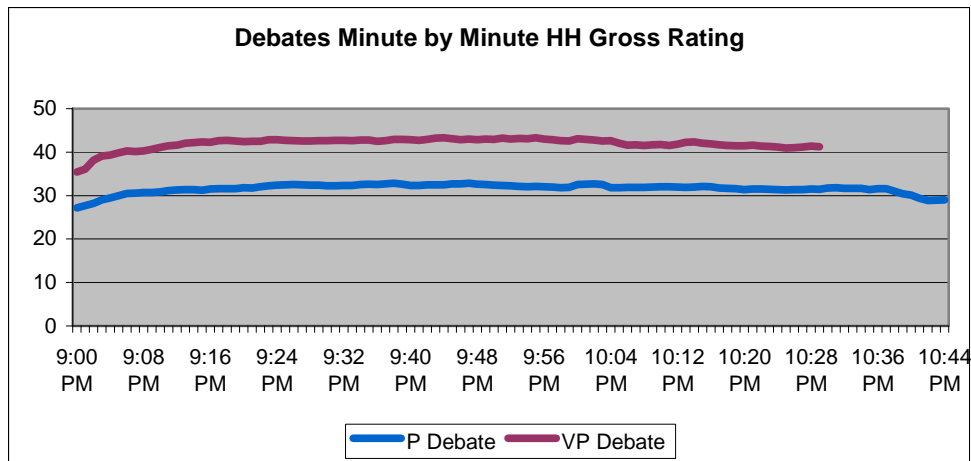
Only-Only-Both of the Debates

Overall unduplicated household reach to either debate was 61.0%, meaning 39.0% of all homes did not tune in to either debate. 30.3% of households watched both the Presidential and the Vice Presidential debate, while 11.2% viewed only the Presidential debate and 19.5% saw only the VP debate.



Minute By Minute

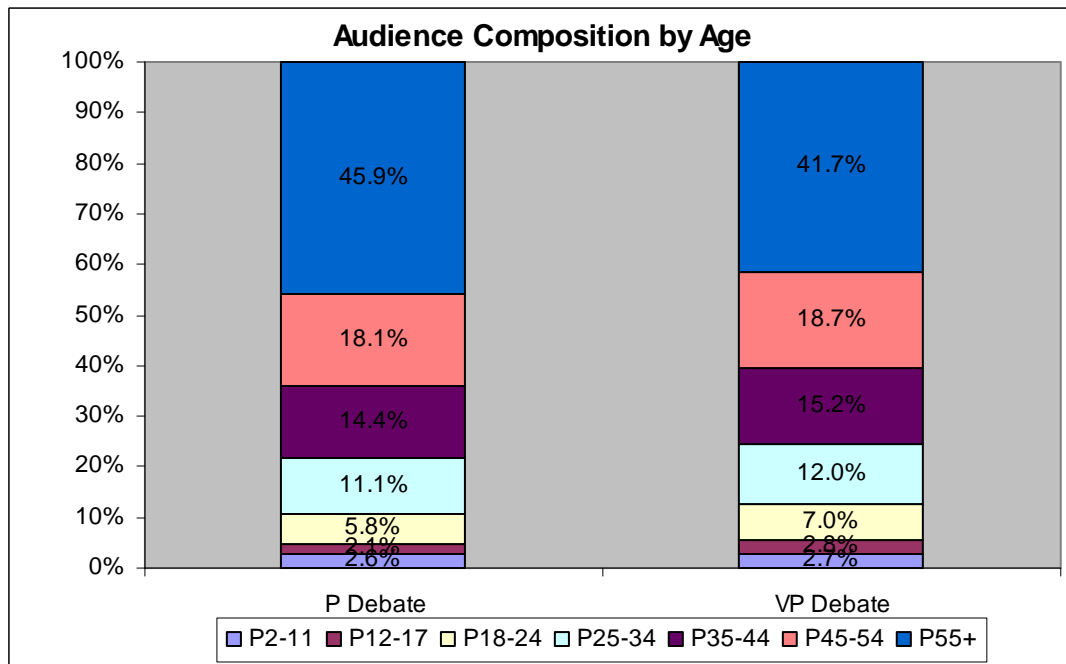
Household viewership was very steady throughout both the first Presidential debate and the Vice Presidential debate, as shown in the chart below which graphs the minute by minute HH gross rating. From 9:05pm to 10:40pm, the first Presidential debate delivered over a 30.0 rating, peaking with a 32.9 rating at 9:38pm. Ratings for the VP debate were above a 40.2 rating from 9:06 through the end of the telecast (10:30pm), peaking with a 43.3 rating at 9:44pm and 9:55pm. Ratings for the VP debate consistently out-delivered the Presidential debate, with the increase ranging from 30%-36%.



Audience Composition

Similar to the reach, the debates' audiences were largest among the older demographic group and decreased with the younger demos. Each younger demo (below P55+) did make up a slightly larger piece of the audience for the VP debate vs. the Presidential debate, which lowered the older P55+ composition from 45.9% to 41.7% of all viewers.

The median age was 2 years younger for the VP debate than the Presidential debate (52 vs. 54 among P18+). This age difference may be attributed to additional younger viewers being available to watch on a Thursday night than a Friday night (when the Presidential debate aired).



Household Viewership Profile

The chart below profiles homes that watched each debate. For the most part, the debates had similar audiences in that their viewers were more likely to be white, have higher incomes (100K+), have a higher



education (4+ yrs college), and live in the Northeast or Southeast (although the live nature of these telecasts may be driving the viewing by region).

Head of homes that are African Americans made up a larger portion of the Presidential debate audience (14.0%) than the VP debate audience (12.3%) as well as the TV norm (12.2%). Hispanics were less likely to watch the debates, as Hispanic households made up only 6.3%-6.5% of the debates' overall audience, strongly under the TV norm of 11.1% homes headed by Hispanics.

HH Viewership Profile	UE	Pres Debate 1		VP Debate	
		Debate	Index	Debate	Index
HOH Ethnicity					
White	76.1%	78.4%	103	81.0%	106
African American	12.2%	14.0%	115	12.3%	101
Other	11.6%	7.9%	68	7.3%	63
HOH Origin					
Hispanic	11.1%	6.5%	59	6.3%	57
Non-Hispanic	88.9%	93.4%	105	93.8%	106
HH Income					
<20K	14.7%	14.5%	99	12.7%	87
20K - <40K	22.9%	19.9%	87	18.7%	82
40K - <60K	19.5%	16.3%	84	17.0%	87
60K - <100K	25.9%	24.2%	93	24.5%	95
100K+	17.1%	25.3%	148	27.4%	160
HOH Education					
<9 Yrs Grade School	3.4%	3.2%	94	2.3%	67
1-3 Yrs High School	7.1%	6.4%	91	5.6%	79
4 Yrs HS/Graduate	23.0%	27.9%	122	26.1%	114
1-3 Yrs College	34.4%	26.5%	77	27.4%	80
4+Yrs College	32.1%	34.5%	107	36.1%	112
Region/Territory					
East Central	12.8%	12.8%	100	12.6%	98
Northeast	19.9%	21.6%	108	22.1%	111
Pacific	19.3%	17.4%	90	16.2%	84
Southeast	20.9%	23.2%	111	22.7%	109
Southwest	11.7%	10.4%	89	10.7%	91
West Central	15.4%	14.7%	96	15.8%	103

TV Usage

The debates have drawn more viewers to their TV sets on their respective nights than normal. Similar to the Presidential debate (where HUT levels were 12% above Friday norms), the VP debate also posted stronger usage among homes when compared to the prior Thursday night (9/25/08, +9.4%) and the equivalent Thursday last year (10/4/07, +10.5%). All age breaks also saw increases in usage levels with the VP debate.

Presidential Debate 1 – Usage Comparison:

Friday 9:00PM - 10:45PM										
HUT/PUT - Live+SD - Live Feed	HHLd	P2+	P18+	P2-11	P12-17	P18-24	P25-34	P35-44	P45-54	P55+
9/26/2008	60.7	38.6	43.3	22.8	22.6	25.9	34.1	39.0	45.1	56.7
9/19/2008	54.2	33.3	36.1	25.1	20.9	20.2	29.7	32.1	37.9	47.4
9/28/2007	54.1	33.0	35.8	24.9	21.5	21.5	27.4	30.8	36.9	48.7
09/26/08 vs 09/19/08	12.1%	16.0%	19.7%	-9.2%	8.1%	28.6%	14.8%	21.7%	19.0%	19.6%
09/26/08 vs 09/28/07	12.3%	17.0%	20.8%	-8.4%	5.1%	20.7%	24.4%	26.6%	22.0%	16.6%

Vice Presidential Debate – Usage Comparison:

Thursday 9:00PM - 10:30PM										
HUT/PUT - Live+SD - Live Feed	HHLd	P2+	P18+	P2-11	P12-17	P18-24	P25-34	P35-44	P45-54	P55+
10/2/2008	69.3	45.3	51.0	23.6	29.4	35.0	42.5	47.7	53.5	62.5
9/25/2008	63.3	39.7	44.3	21.7	27.9	31.5	38.6	41.1	45.9	53.4
10/4/2007	62.7	38.6	43.0	22.1	26.5	30.8	37.3	38.7	43.7	53.3
10/02/08 vs 09/25/08	9.4%	14.0%	15.1%	8.7%	5.4%	10.9%	10.1%	16.1%	16.5%	17.0%
10/02/08 vs 10/04/07	10.5%	17.3%	18.6%	6.7%	11.2%	13.6%	13.9%	23.4%	22.4%	17.3%

Local Ratings

Across the 55 metered markets, the VP debate had a 45.0 live HH rating, which is substantially higher (30%) than the 34.7 HH rating to the first presidential debate.

Top 10 Markets to Pres Debate 1:

The top 10 tuning markets to the first presidential debate are listed below along with their ratings to the VP debate. Five of these ten markets were not among the top 10 tuning markets to the VP debate. Baltimore had the most tuning among all of the metered markets for each of the debates.

Market	Top 10 to Pres Debate 1							
	09/26/2008 - Pres Debate 1				10/02/2008 - VP Debate			
	Total RTGs	Total SHR	Total (000)	RTG Rank	Total RTGs	Total SHR	Total (000)	RTG Rank
Baltimore	47.7	66.0	522	1	59.1	74.3	651	1
Memphis	47.5	63.0	316	2	51.4	66.1	346	12
Washington, DC (Hagrstwn)	44.7	68.0	1034	3	51.2	72.8	1192	13
Norfolk-Portsmth-Newpt Nws	43.5	61.0	317	4	53.9	67.7	389	4
Charlotte	42.0	58.0	457	5	51.6	67.9	580	11
Richmond-Petersburg	41.9	57.0	221	6	52.1	67.8	286	8
Nashville	40.8	60.0	396	7	53.4	68.1	543	5
Miami-Ft. Lauderdale	40.6	56.0	629	8	44.8	61.8	693	31
St. Louis	40.5	63.0	508	9	58.3	77.9	730	2
Greensboro-H.Point-W.Salem	40.2	57.0	273	10	48.0	65.4	328	22

Top 10 Markets to VP Debate:

While the first presidential debate was heavily viewed in the battleground states of Virginia, North Carolina, and Florida, the VP debates also ranked highly in battleground states. The battleground states that were included in the top 10 markets to the VP debate include Missouri (St. Louis and Kansas City), Virginia (Norfolk and Richmond), and Pennsylvania (Pittsburgh). Four of the top ten markets to the VP debate are among the ten highest penetration African American metered markets.

Interesting to note that St. Louis, which hosted the Vice Presidential debate, had the strongest share delivery (77.9) of the top 10 metered markets.



Market	Top 10 to VP Debate							
	09/26/2008 - Pres Debate 1				10/02/2008 - VP Debate			
	Total RTGs	Total SHR	Total (000)	RTG Rank	Total RTGs	Total SHR	Total (000)	RTG Rank
Baltimore	47.7	66.0	522	1	59.1	74.3	651	1
St. Louis	40.5	63.0	508	9	58.3	77.9	730	2
Boston (Manchester)	39.8	58.0	954	13	54.3	72.9	1310	3
Norfolk-Portsmth-Newpt Nws	43.5	61.0	317	4	53.9	67.7	389	4
Nashville	40.8	60.0	396	7	53.4	68.1	543	5
West Palm Beach-Ft. Pierce	39.6	59.0	308	14	53.4	71.9	416	5
Kansas City	36.6	59.0	339	18	53.2	74.8	499	7
Richmond-Petersburg	41.9	57.0	221	6	52.1	67.8	286	8
Pittsburgh	35.6	56.0	412	22	51.9	65.9	602	9
Detroit	35.3	57.0	681	24	51.8	71.1	999	10

Specs: Viewing sources included ABC, CBS, FOX, NBC, Telefutera, Telemundo, BBC-America, CNBC, CNN, FOX News, and MSNBC. Based on "Live+Same Day" rating

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