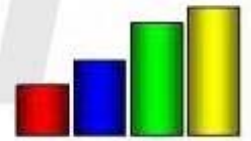


The Media Audit



Insights for Today's Changing Media and Consumer Marketplace

The Media Audit Releases New Report: Late News and Web Packs a Punch



While the share of available viewers for local early and late evening news has been in slow decline over the past decade, a new report issued by The Media Audit suggests some local TV affiliates are picking up the slack by drawing in audiences via the Web. For those stations who are successful in attracting additional visitors to their web site, the resulting net increase in

total audience translates to increased revenue opportunities in the booming local online advertising industry, where spending is estimated at \$5.9 billion for 2006, a 20% increase over last year.

The report, which summarizes local TV web site ratings for 84 markets, demonstrates TV's strength in audience size when its web audience is added to its local news programs. When analyzing total unduplicated net reach of a station's late news plus its web audience, several stations across the country were able to achieve similar reach to that of a typical daily newspaper's weekday reach. On average, 50.4% of all adults nationally read a weekday newspaper, according to The Media Audit.

WLBT-TV, an NBC affiliate in Jackson, Mississippi, ranked as the number one TV station with a total unduplicated net reach of 49.5% with adults 18+. This reach is achieved by combining the station's past week late news audience with its past 30-day web site visitors. By adding the station's web site reach to its local news, the station was able to cumulatively grow its total audience by nearly 40,000 additional viewers. According to the report, the station's late news ranks seventh overall in the country with a 37.8% weekly reach with adults 18+, while its web site ranks ninth overall in the country with a 23.8% past 30-day reach.

Dan Modisett, Vice President and General Manager of WLBT-TV, recently purchased by Raycom, explains that "Our online audience is a moving target. As a result, our web site is

constantly evolving and morphing." Modisett, a 22 year veteran in the television industry, adds that the station's web site attracts younger viewers who are less likely to view local news on television. According to the most recent Jackson, Mississippi survey conducted by The Media Audit, only 22.8% of WLBT's late news viewers are 18-34 years old, however, nearly 40% of WLBT.com's audience is in the same age group. In the future, he hopes they will become TV news viewers, but for now Modisett appreciates that this younger audience is drawn to WLBT's online content.

Further adding to the success of the station's web site is its at-work audience. "Eight to five is now the primetime for our online audience", Modisett states. This is substantiated in data from The Media Audit. In Jackson, 43.2% of adults who logged on to the internet from work in the past month have visited WLBT.COM, compared to 33.6% who have logged on from home. In larger markets such as Denver, KUSA.COM visitors are also more likely to be using the internet between 8am and 6pm. Of KUSA.com visitors, approximately three quarters are online between 8am and 6pm on the typical day, a number that is significantly higher than the average for the market.

Other top stations in the report include KOTV-TV in Tulsa (49.5% unduplicated reach with its late news and web site

Top 10 TV Stations for Viewed Late News Past 7 Days + Visited Web Site Past 30 Days			
Market	Station	Unduplicated Reach 18+	% of Audience Between 18-34 Years
Jackson, MS	WLBT-TV	49.5	News (22.8%) Online (38.6%)
Tulsa, OK	KOTV	49.5	News (21%) Online (35.7%)
Omaha, NE	WOWT-TV	49.4	News (20.4%) Online (39%)
Denver, CO	KUSA-TV	49.1	News (21.7%) Online (33%)
Raleigh-Durham, NC	WRAL-TV	48.6	News (22%) Online (36%)
Omaha, NE	KETV-TV	48.4	News (31%) Online (46.3%)
Columbia, SC	WIS-TV	48.2	News (32.3%) Online (31.3%)
New Orleans, LA	WWL-TV	47.3	News (20.8%) Online (22.5%)
Nashville, TN	WTVF-TV	47.2	News (24.7%) Online (31.1%)
Greensboro, NC	WGHP-TV	47.1	News (24.2%) Online (20.2%)*

* WGHP News is aired during Prime Time and is a Fox Station

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In Brief

Consumer Electronics Purchasers:

Home Depot & Lowe's Shoppers on the Rise



According to the 2005 National Report from The Media Audit, the percentage of adults who are shopping at Lowe's and Home Depot for electronics purchases is on the rise.

According to the Study, 9.7% of adults shop Home Depot most often when making electronics or appliance purchases, compared to 8.5% a year earlier. Similarly, 8.1% of adults surveyed said they shop Lowe's most often for electronics or appliance purchases, compared to 7% a year earlier. This represents a 14.1% increase for Home Depot and a 15.7% increase for Lowe's. The study was conducted in 85 markets between January 2005 and March 2006 and compared shopping habits for the same period a year earlier.

Among all adults, Sears remains the number one retailer shopped most often for consumer electronics and appliances (39.9% shop there most often) followed by Best Buy (32.7%), Circuit City (13.7%) and Wal-Mart (12.6%). Among Sears, Best Buy and Wal-Mart shoppers, the percentage who shop these retail stores for electronic and appliance purchases has remained relatively flat since 2004. The largest decrease in electronics and appliances is with Circuit City shoppers. In

2004, 14.3% shopped the retailer most often, representing a 4.2% decline in one year. The survey covers consumer planned purchases for stereos, CD and DVD players, video cameras, VCR's, DVD recorders, personal computers, major household appliances such as refrigerators, washing machines, dryers, cooking ranges, dishwashers, and television sets.

The same study revealed that the number one electronics purchase category is personal computers (24.3% of adults plan to purchase a computer or computer equipment in the next 12 months), followed by video equipment, including VCR's, DVD players or video cameras (19.2% plan to purchase), stereo equipment, tape or CD players (16.6%), television sets (15.3% plan to purchase), and major household appliances (12.6% plan to purchase). Adults who plan to purchase a new TV set in the next 12 months increased from 14.7% in 2004 to 15.3% in 2005. This represents a growth of 4.1%, more than any other consumer electronic category. For more information on this study, contact The Media Audit.

Plan to Purchase Next 12 Months	2005	2004	2003	2002	2001
Stereo/Tape/CD/Player	16.6	18.0	15.3	16.0	16.8
Video Camera/VCR/DVD	19.2	20.9	18.8	19.9	20.5
Personal Computer/Equipment	24.3	24.7	22.0	22.1	23.1
Major Household Appliance	12.6	12.7	11.0	11.0	11.4
New TV Set	15.3	14.7	12.6	12.1	12.1

Out-of-Home Advertising:

Outdoor Stands up to Other Media

New information from The Media Audit National Report reveals that when comparing heavy outdoor users to heavy users of radio, TV, and newspaper, outdoor ranks highest in average household income. The average household income for heavy outdoor users is \$74,144 compared to \$63,277 for heavy newspaper readers, \$62,655 for heavy radio listeners, and \$51,255 for heavy TV viewers. Heavy outdoor users are defined as having driven 200 or more miles per week, which represents 37% of all U.S. adults.

According to the study, heavy outdoor users are also younger than heavy radio, TV or newspaper audiences and are more likely to have a four year college degree. The average age for a heavy outdoor user is 42.7 years old, compared to 48 years for television, 43.1 for radio, and 54.7 years for newspaper. Heavy users are also 16% more likely to have a college degree, with

the highest percentage of college graduates compared to the other media.

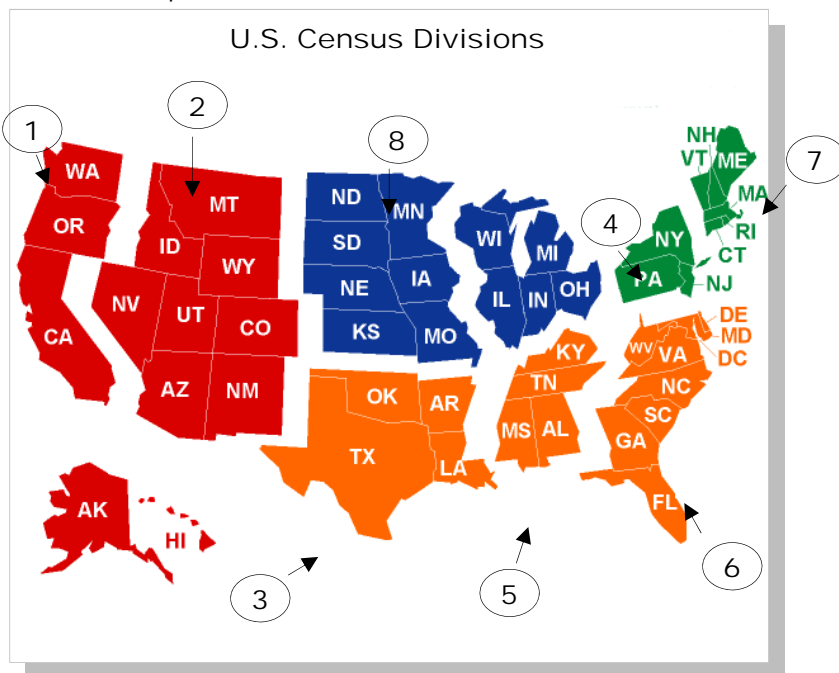
As a result, outdoor advertising has become a desirable medium for many of the country's top marketers, who spent more than \$6.3 billion in advertising in 2005. Not only are outdoor users younger with more income, they are more likely to be making purchases such as luxury automobiles, and spending more money on entertainment. According to The Media Audit, 21.4% of heavy outdoor users plan to purchase a vehicle in the next 12 months and they are 41% more likely to spend more than \$30,000 for that purchase. Heavy outdoor users are also 35% more likely to dine out frequently at a sit-down restaurant, and 30% more likely to frequently attend professional or collegiate sporting events. For more information on this report, contact The Media Audit.

Measuring the Market

Special Report: A look at Consumers by Region:

Where do your Best Prospects Live?

Advertisers are continually faced with new challenges posed by the shifting consumer and media marketplace. Knowing where consumers live is as important as presenting geographically relevant content that will provide for greater marketing impact and better ROI for a local, regional or national ad campaign. A new national consumer database offered by The Media Audit now provides greater geo-targeting capabilities that enable users to determine which areas of the country offer advertisers the greatest growth opportunities and potential for profit. The consumer database has been enhanced to include respondent level data that is compared with U.S. Census Regions and Divisions. (The national consumer database also allows for market-by-market comparisons.) The consumer database consists of more than 114,000 respondents.



One example of a growth category for 2006 is the restaurant industry. The restaurant sector rose 22.7% to \$451 million for Q1 and continues to be one of the fastest growing sectors in terms of percent increase over the same period last year. According to The Media Audit, presence of children in the household contributes to the likelihood to eat fast food specifically. According to the 2005 National Report, more than 50% of heavy fast food eaters have children living at home (13% more likely to be heavy fast food eaters), whereas groups such as empty nesters are less likely to consume fast food. According to The Media Audit, adults who eat five or more fast food meals per week are defined as heavy fast food eaters and comprise more than 10% of the U.S. population. The greatest concentration of heavy fast food eaters who have children living at home can be found living in the West South Central and East South Central part of the U.S. In contrast, consumers who live in the Middle Atlantic and New England areas who have children living at home are less likely to be heavy fast food purchasers. Therefore, the messaging and reach and frequency of media by region would likely vary for a campaign targeted at families with busy lifestyles. For more information on maximizing ROI through geo-targeting, contact The Media Audit.

1. **30.4%** Highest percentage of households earning \$150,000 or more who own a foreign luxury vehicle (BMW, Mercedes, Lexus, Infinity, Jaguar or Porsche) - **Pacific Division**
2. **82%** Greatest percentage of adults who plan to remodel and who shop at Home Depot - **Mountain Division**
3. **50%** Greatest percentage of households with children living at home who are heavy fast food eaters - **West South Central Division**
4. **16.4%** Highest percentage of women who are heavy jewelry store shoppers - **Middle Atlantic Division**
5. **28%** Greatest percentage of professional football fans who are also heavy soft drink consumers - **West South Central Division**
6. **45.2%** Highest percentage of heavy beer drinkers who are NASCAR fans - **East South Central Division**
7. **9.5%** Greatest percentage of Toyota owners who plan to purchase a new vehicle in the next 12 months - **New England Division**
8. **28.1%** Highest percentage of gamers (hunting/fishing) who own a power or motor boat - **West North Central Division**

Source: The Media Audit 2005 National Report

Facts 'n Stats

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(Continued from front page) audience combined), WOWT-TV in Omaha (49.4% reach), KUSA-TV in Denver (49.1% reach), and WRAL-TV in Raleigh-Durham (48.6%). Among all local TV web sites measured by The Media Audit, WRAL.COM ranks number one with a 36.9% reach.

The Media Audit provides the most comprehensive ratings data on local media web sites for 84 U.S. markets. Included in each local report are metrics for those who have visited a web site in the past 30-days, past week and yesterday.

Through a proprietary software analysis program, The Media Audit enables clients to calculate unduplicated reach for media combinations, such as local television news and a television station's web site. Detailed day-part information provides users the ability to observe online usage throughout a typical day.

Those dayparts include midnight to 8am, 8am to 11am, 11am to 1pm, 1pm to 6pm, 6pm to 10pm and 10pm to midnight.

For more information on the Print Media & Television Website Ratings report, contact The Media Audit.

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