

End of the Season TV Report

JUNE 2009



We know who won? But who watched and why?

Underdog, Kris Allen claimed the *American Idol* crown. Helen Philips is the *Biggest Loser*. Olympic medal winner Shawn Johnson conquered the *Dancing With The Stars*' floor. James Thomas is the *Survivor*. Those on *Lost* are, well, still lost. And *Grey's Anatomy*...

This past TV season was full of suspense and great surprises. But past the shocking endings and ratings, who actually watched these shows? How are they different? Or how are they similar?

The following slides will provide you with deeper insights into the viewers of the six shows listed above along with the shows' website activity. But let us first review how well these shows' websites ranked and performed.

Sources:

Experian Simmons Multi-Media Engagement Study Winter 2009 Full Year

Slide 3: Hitwise, Based on US Internet usage for the week ending May 16, 2009

Slide 8, 9: Experian Simmons National Consumer Study/National Hispanic Consumer Study Fall 2008 Full Year



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Ranking the Shows' Website

Listed below are the top six websites in [Hitwise](#)'s U.S. TV shows online industry category.

American Idol's website captured close to 23% of the U.S. Internet market share in the category and ranked as number one. And interestingly, the top four sites during the week ending on 5/16/09 were all reality TV shows.

Show's Website	Market Share	Rank (wk ending 5/16/09)	Rank (wk ending 5/9/09)	Rank (wk ending 5/2/09)	Rank (wk ending 4/25/09)
American Idol on FOX	22.8%	1	1	1	1
NBC > The Biggest Loser	11.3%	2	2	4	5
ABC > Dancing With The Stars	7.4%	3	3	2	2
CBS > Survivor	4.4%	4	4	5	5
ABC > Lost	4.1%	5	7	8	7
ABC > Grey's Anatomy	3.9%	6	10	15	14

For more information about our sister company, Hitwise, please refer to slide 10.



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Why Reality Rocks

One reason reality TV shows topped the chart on slide 3 as opposed to, say, broadcast dramas can be partially explained by viewers' engagement to these shows. As the chart below from the Simmons Multi-Media Engagement Study indicates, broadcast reality programs score higher than broadcast dramas in most of the measured engagement dimensions, but especially the dimensions of Trustworthy and Life Enhancing.* This indicates that for all the over-the-top publicity stunts which are the stock and trade of reality TV, viewers still find them to be trustworthy and capable of teaching them new things.

Engagement Dimension	Broadcast "Reality" Score	Broadcast Drama Score
Inspirational	262	238
Trustworthy	289	236
Life Enhancing	217	180
Social Interaction	281	256
Personal Timeout	323	331
Ad Attention/Receptivity	216	192
Personal Connection	249	240
Near & Dear	300	341

Engagements scores are calculated on a scale from 100 to 500, with 500 being the highest score that a program can receive for any single dimension.

* For the definition of the dimensions, please refer to slide 6.



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Why Reality Rocks Cont'd

- Broadcast reality programs also score higher in the Social Interaction engagement dimension than broadcast dramas, meaning viewers are more likely to discuss reality show with their colleagues, friends, and family over scripted dramas.
- Advertisers who buy time on broadcast reality programs have a better opportunity of getting their products noticed and ultimately purchased than if they advertised on broadcast dramas. Specifically, broadcast reality programs score 13 percent higher on the Simmons Ad Attention/Receptivity dimension than scripted broadcast dramas.

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Definition of Engagement Dimensions

Global Dimensions:

- Inspirational:** I am inspired by this program, magazine or Internet site; I have an emotional connection to this program, magazine or site.
- Trustworthy:** I trust that this program, magazine or website tells the truth and does not sensationalize things.
- Life Enhancing:** I am always learning about new things and places from this program, magazine or website—things that help me make better decisions in my life.
- Social Interaction:** This program, magazine or website constantly provides fodder for conversations that I have with friends and family.
- Personal Timeout:** This program, magazine or Internet site is an escape; I like to kick back and unwind with it.
- Ad Attention/Receptivity:** I am open to viewing/reading advertising on this program, magazine or Internet site because it is interesting and relevant to me.

TV Local Dimensions:

- Personal Connection:** I have a personal association with the characters/situations in this vehicle and I would sign up to receive a newsletter or products offered relating to this vehicle.
- Near and Dear:** This program is part of my regular schedule and I devote my full attention to it.



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A Closer Look Into the Viewers

To further understand reality and scripted show viewers, the next two slides provide demographic information on these two program viewer types.

The data is from the Simmons National Consumer Study/National Hispanic Consumer Study Fall 2008 Full Year, and was filtered by the six shows mentioned on slide one. Two targets were created:

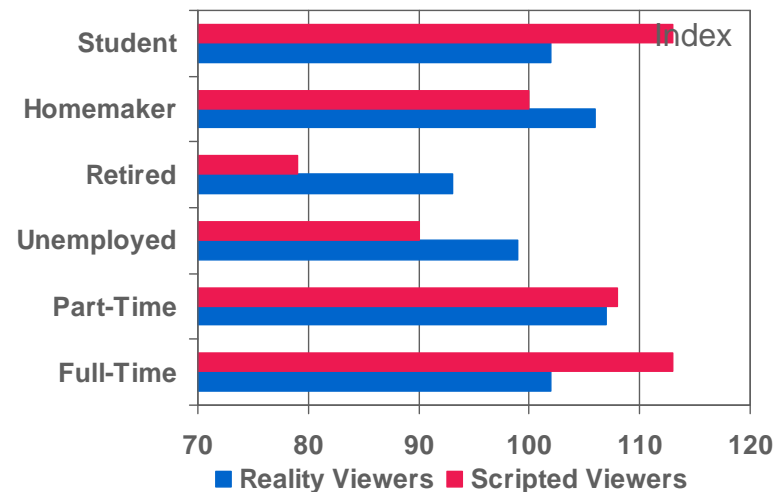
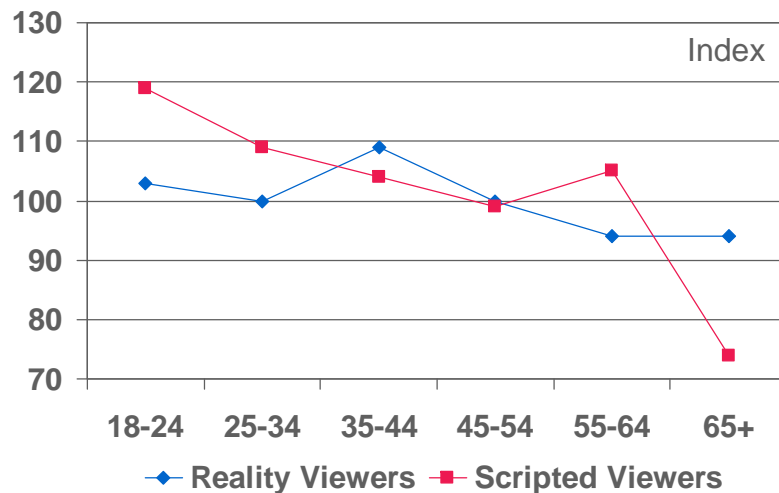
- **Reality Viewers:** Consumers who surveyed as having watched *American Idol*, *The Biggest Loser*, *Dancing With The Stars*, and/or *Survivor* during the past seven days.
- **Scripted Viewers:** Consumers who surveyed as having watched *Grey's Anatomy* and/or *Lost* during the past seven days.



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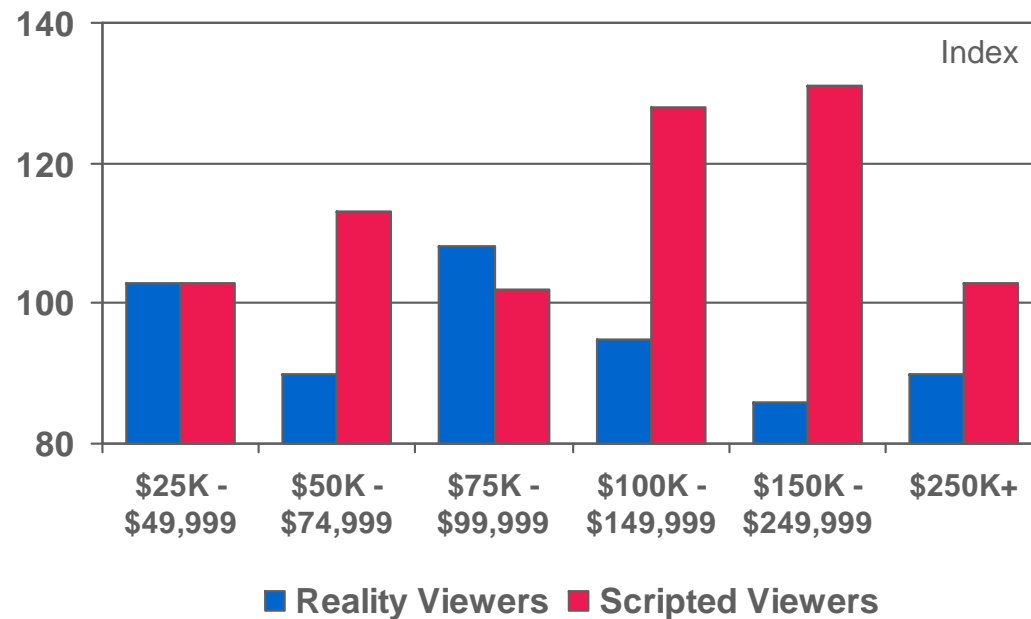
Reality Versus Scripted Viewers

The male and female percentage ratio between reality and scripted show viewers are identical—37% are men, 63% are women. Additionally, though scripted shows are more likely than reality shows to have younger viewers, the 35-44 and 45-54 age groups make up 42% of scripted and reality shows.



The Differences Between Reality & Scripted Viewers

Scripted viewers are more likely to earn six-figure incomes than reality viewers.



About Hitwise

Hitwise is the leading online competitive intelligence service. Only Hitwise provides its 1,500 global clients with daily insights on how their customers interact with a broad range of competitive websites, and how their competitors use different tactics to attract online customers.

Since 1997, Hitwise has pioneered a unique, network-based approach to Internet measurement. Through relationships with ISPs around the world, Hitwise's patented methodology captures the anonymous online usage, search, and conversion behavior of 25 million Internet users. This unprecedented volume of Internet usage data is seamlessly integrated into our easy to use, web-based service, designed to help marketers better plan, implement, and report on a range of online marketing programs.

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For up to date analysis of online trends and statistics, please visit the Hitwise Intelligence Analyst Weblogs at weblogs.hitwise.com and the Hitwise Data Center at www.hitwise.com/datacenter.



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