



2007 Upfront Opinion Study

March 2007

Objective & Methodology

Objective:

Our Upfront Survey, now in its third year, is a joint venture between *Advertising Age* and *TV Guide Network*. The study is designed to uncover category and media spending trends affecting the upfront season and help the market leverage emerging technologies.

Methodology:

Two studies are planned for 2007: this one at the beginning of the upfront, and a concluding survey in July.

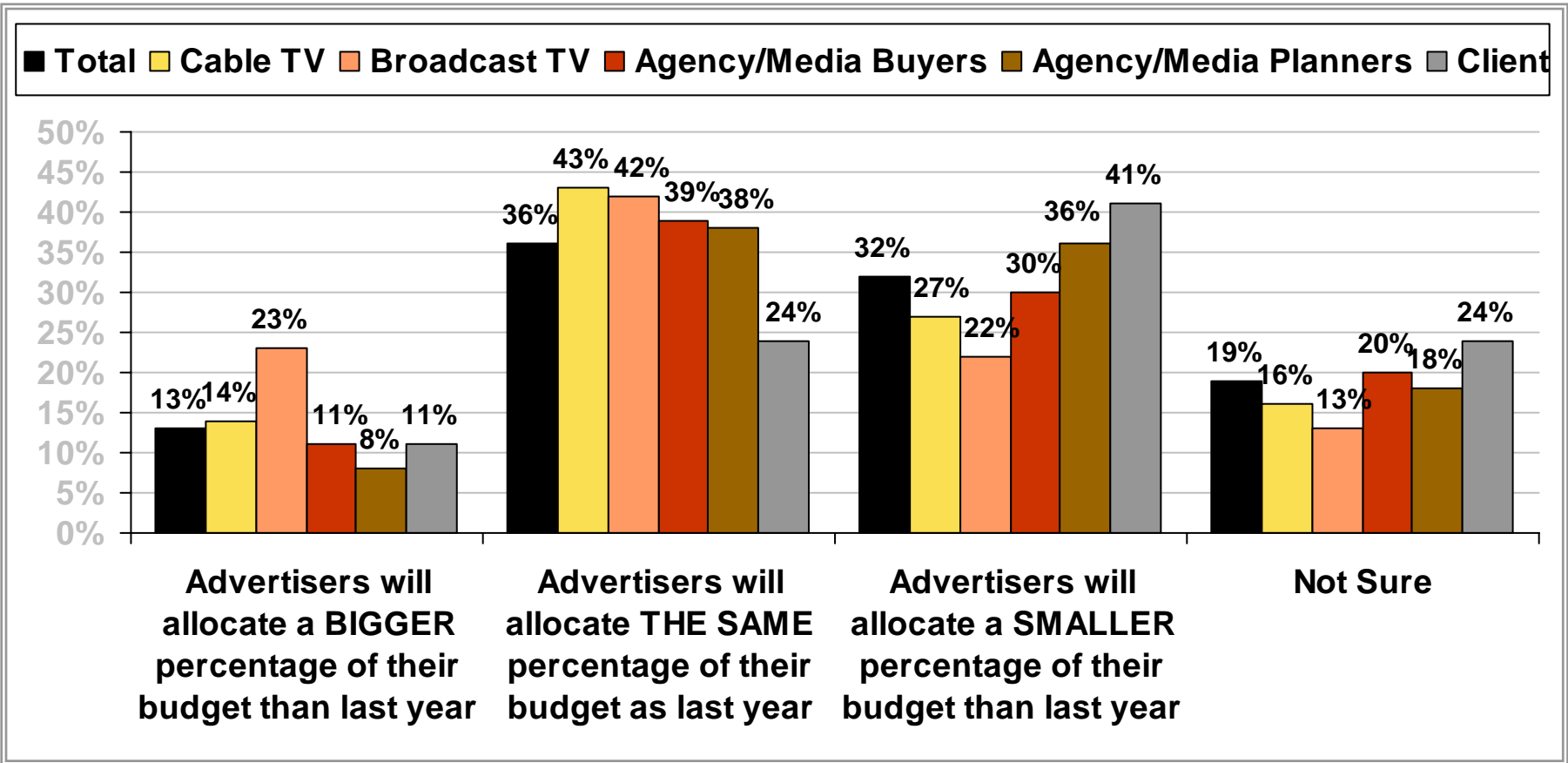
Study results are based on 540 respondents to an online research study conducted by *Advertising Age* and Research Solutions, Inc.

Study Topics

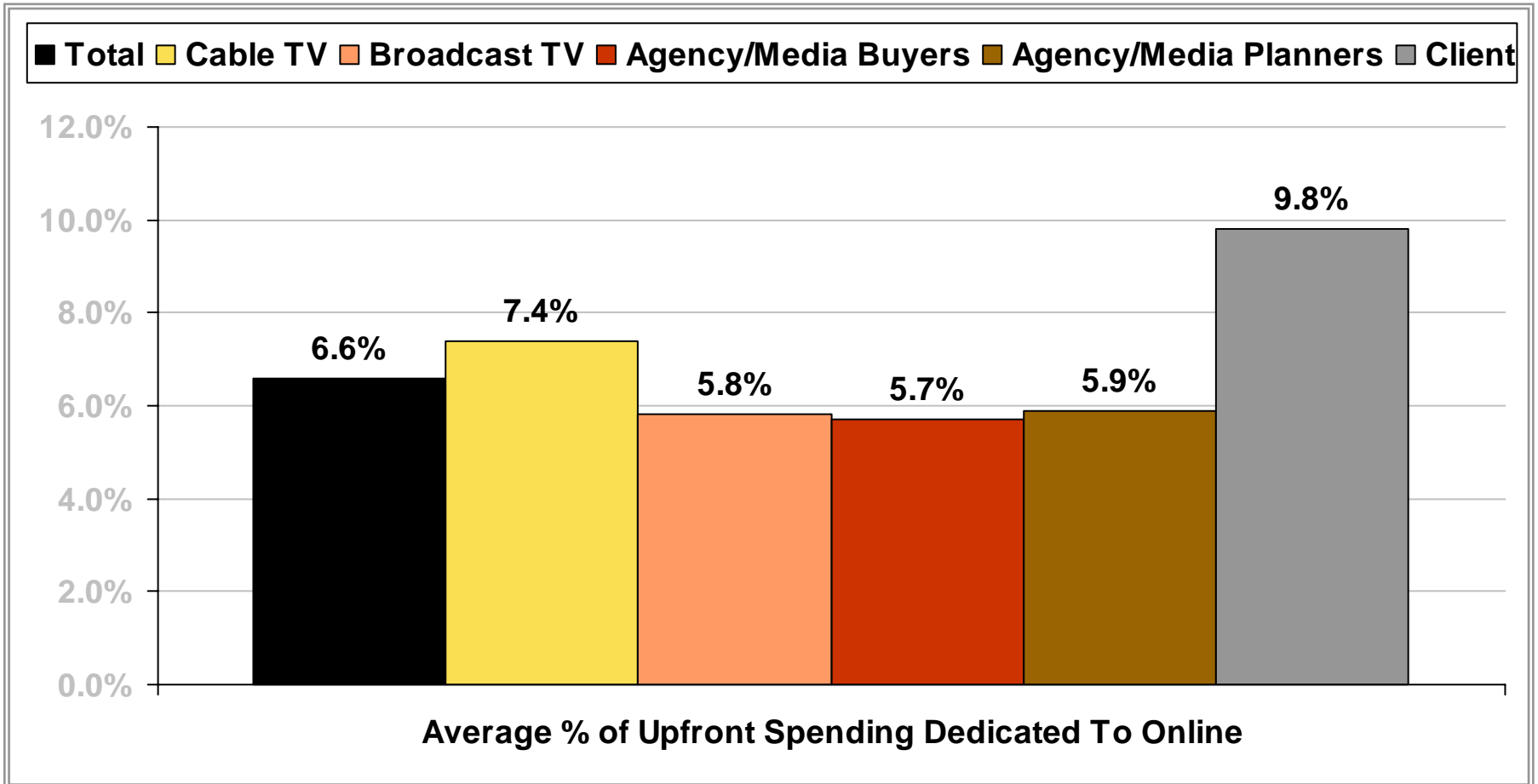
- **Upfront Spending**
 - Spending Allocation Shifts
 - Online Spending
 - Change In Network & Cable TV CPMs For 2007-08
 - Hottest Daypart & Program Genre
 - Negotiation Ratings
- **2007 Trends**
 - Best Multi-Platform Advertising Campaigns
 - Best ROI Prospects
 - Emerging Technology Interests
 - Shifts In Branded Entertainment or Product Placement
 - Video Percentage of Online Advertising

Detailed Findings: Upfront Spending

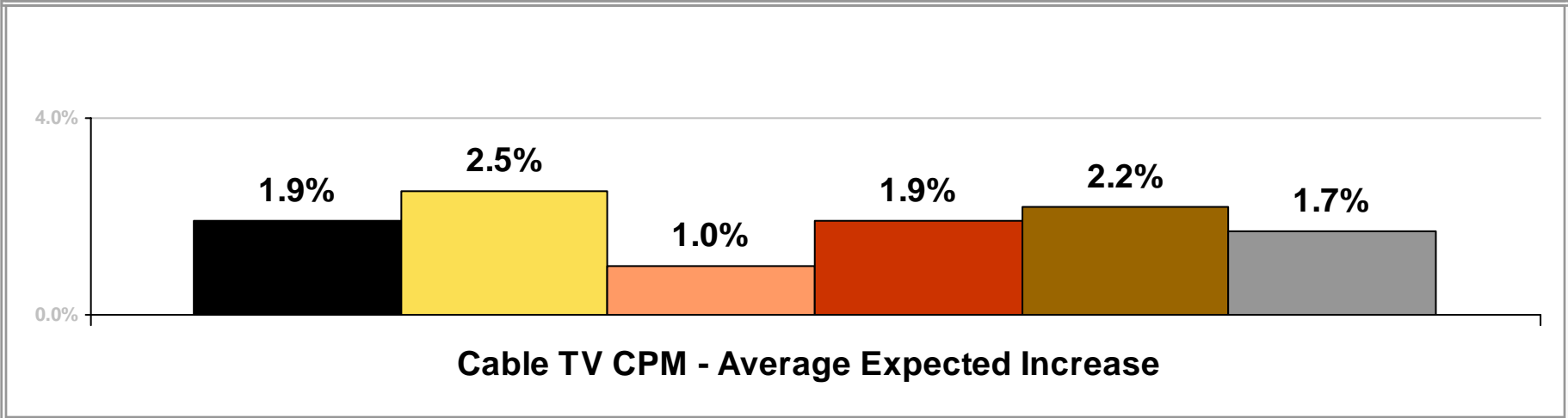
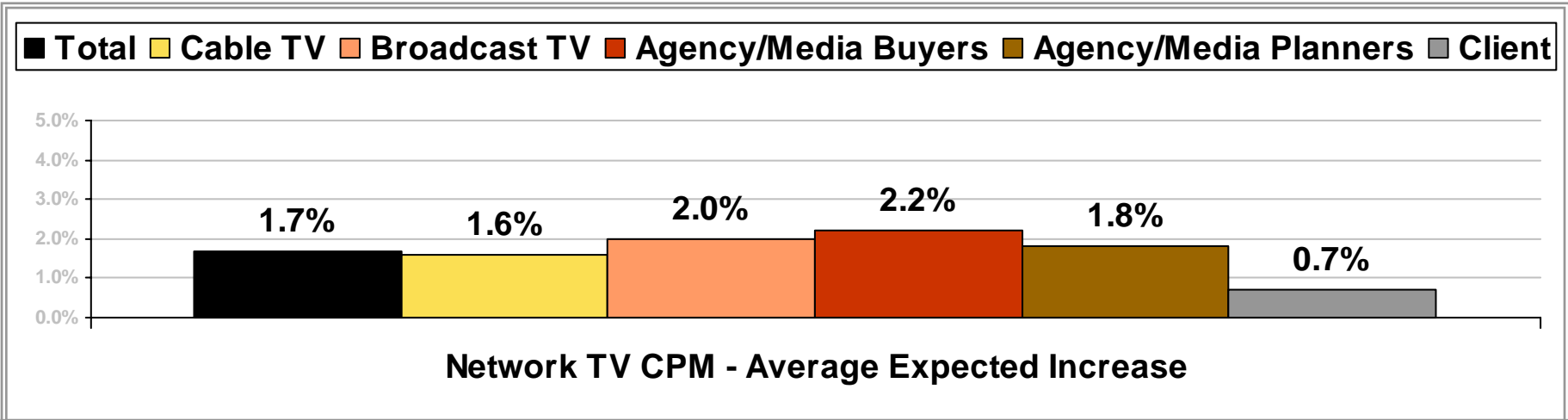
Question: Given the relative strength of the 1st quarter scatter market, how do you expect advertisers to allocate their 2007-08 TV advertising budget?



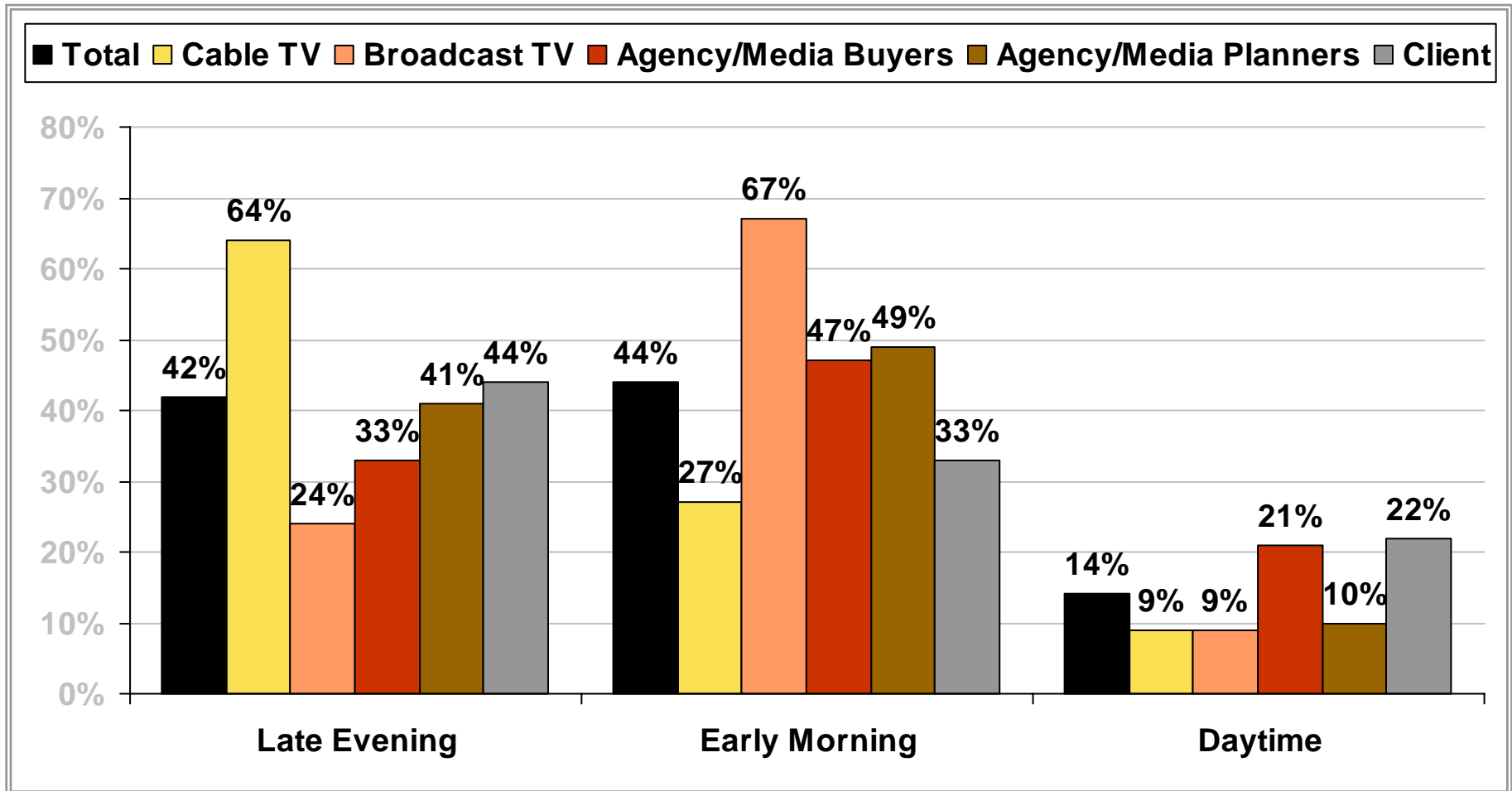
Question: What percentage of the advertising you buy or sell during Upfront 2007-08 will be online ?



Question: How much do you expect network and cable TV CPMs to change in Upfront 2007-08?



Question: Which daypart, other than primetime, will be most in demand in Upfront 2007-08?

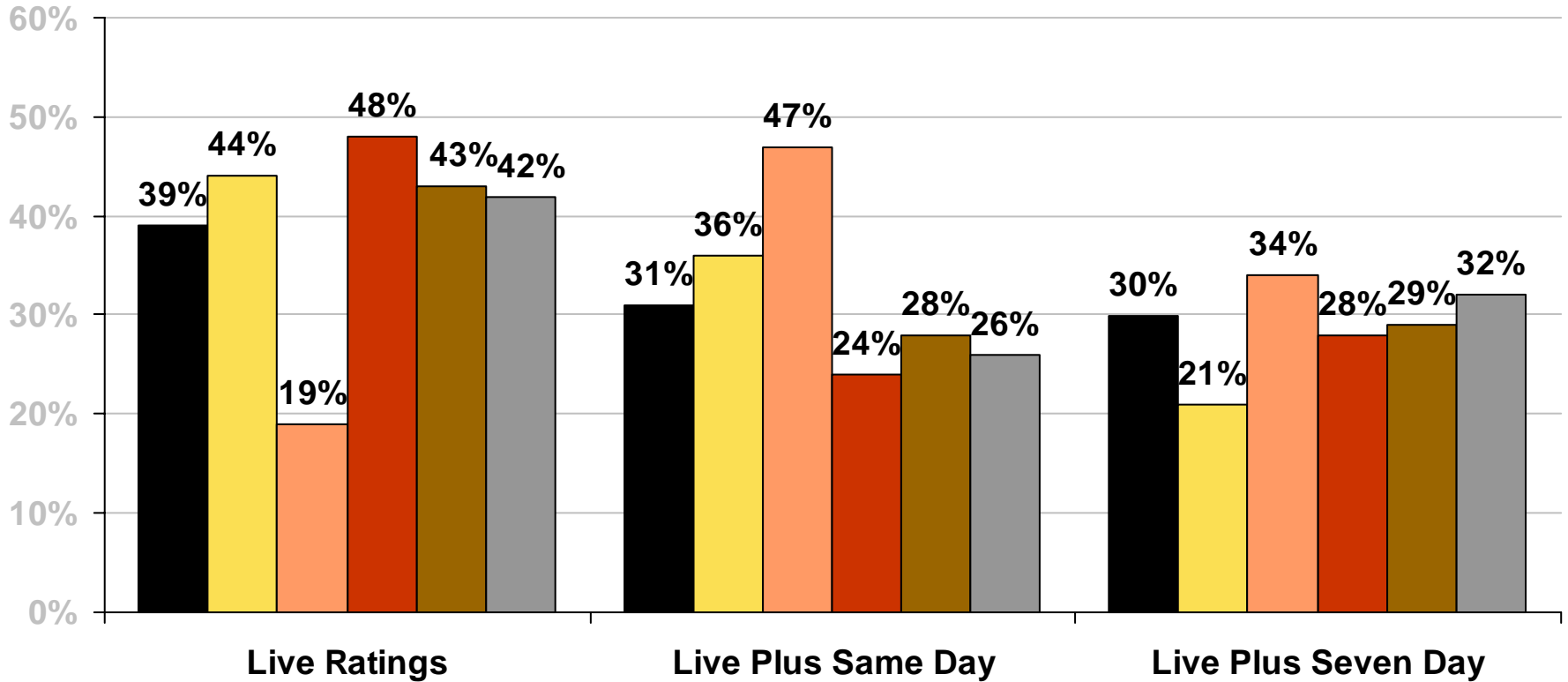


Question: Which program genre will be hottest in Upfront 2007-08 season?

	<i>Total</i>	<i>Cable TV</i>	<i>Broadcast TV</i>	<i>Agency/ Media Buyers</i>	<i>Agency/ Media Planners</i>	<i>Client</i>
Serialized Drama	22%	26%	22%	26%	23%	16%
Procedural Drama	6%	6%	11%	7%	4%	9%
Sitcom	7%	6%	9%	5%	6%	9%
Dramedy	20%	8%	13%	25%	28%	13%
Reality Competition	25%	21%	25%	23%	27%	33%
Sports	16%	29%	13%	12%	10%	13%

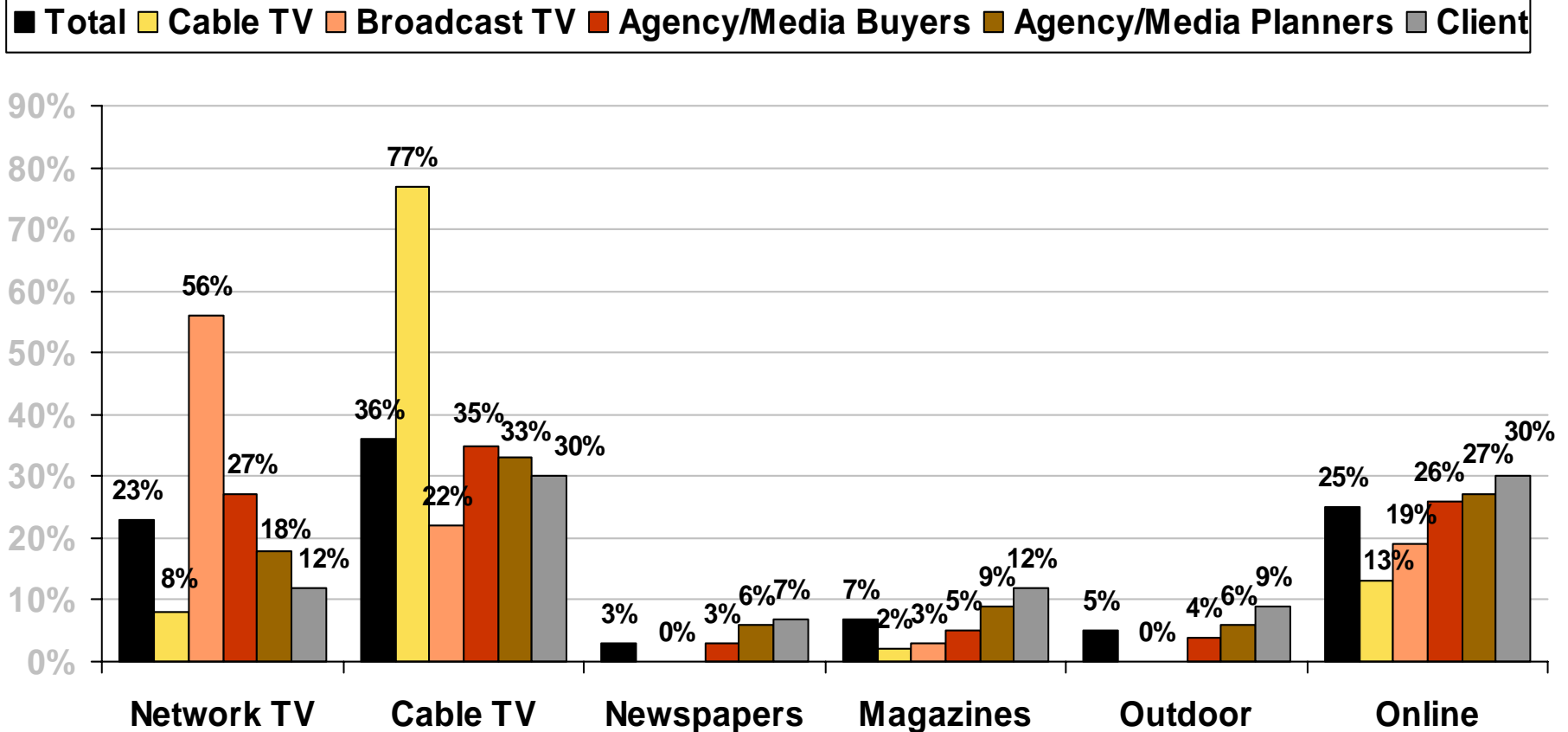
Question: Do you expect to be negotiating on live TV ratings, live-plus same day ratings, or live plus seven-day ratings?

■ Total ■ Cable TV ■ Broadcast TV ■ Agency/Media Buyers ■ Agency/Media Planners ■ Client



Detailed Findings: 2007 Trends

Question: Which medium appears to have the most interesting and attractive multi-platform advertising campaigns this year?



***Question:** Which medium offers the best prospects for ROI, based on conversations you've had so far?*

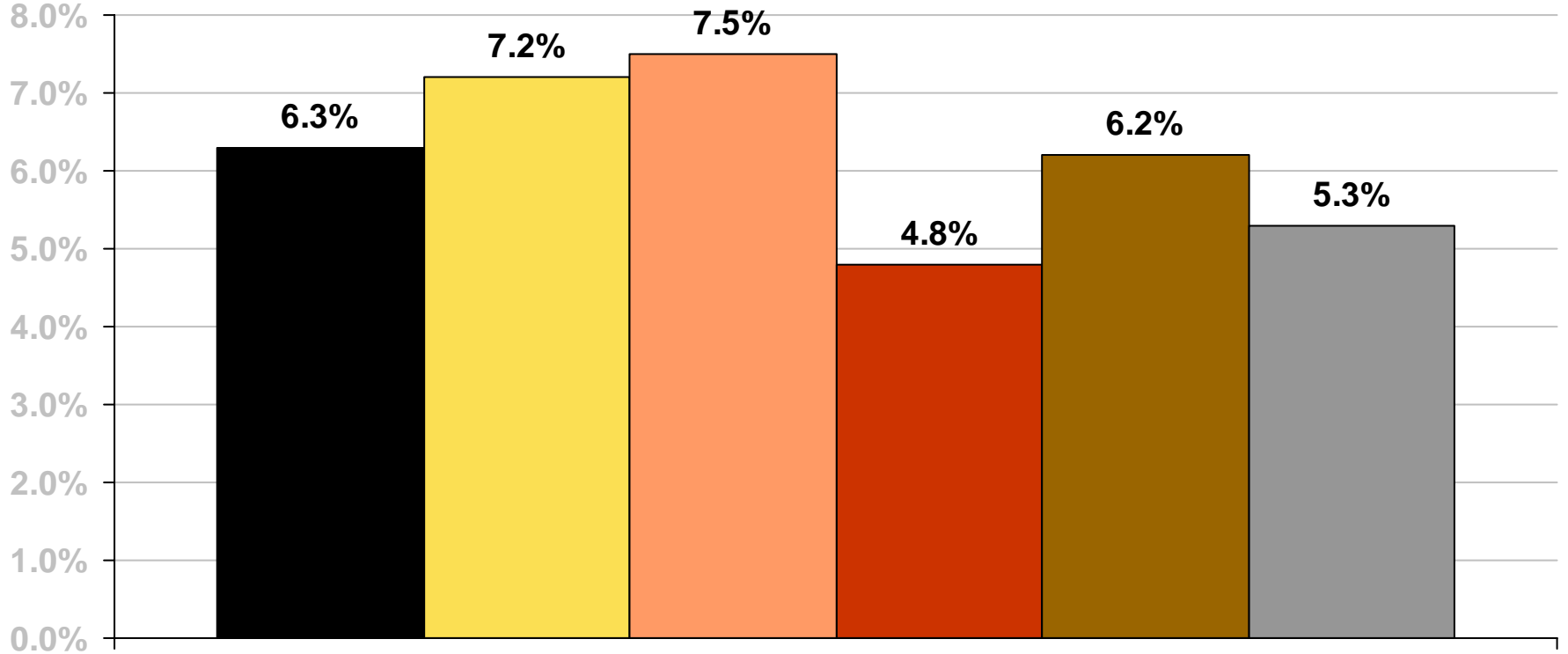
	<i>Total</i>	<i>Cable TV</i>	<i>Broadcast TV</i>	<i>Agency/ Media Buyers</i>	<i>Agency/ Media Planners</i>	<i>Client</i>
Broadcast Networks	14%	5%	48%	8%	11%	5%
Cable Networks	17%	55%	7%	14%	13%	7%
Syndicated TV	4%	0%	7%	4%	1%	2%
Print	4%	0%	0%	4%	2%	12%
Radio	7%	2%	2%	8%	7%	14%
Online	37%	28%	21%	44%	48%	36%
Mobile Programming	3%	2%	3%	1%	2%	2%
Place-Based Media	5%	3%	5%	1%	7%	7%
Word of Mouth	7%	2%	7%	10%	7%	10%

Question: Which emerging technology are you most interested in experimenting with this year?

	<i>Total</i>	<i>Cable TV</i>	<i>Broadcast TV</i>	<i>Agency/ Media Buyers</i>	<i>Agency/ Media Planners</i>	<i>Client</i>
Place-Based Media	9%	2%	10%	13%	12%	7%
Mobile Advertising	22%	24%	21%	22%	22%	21%
Cable On Demand	12%	19%	6%	13%	16%	2%
Web On Demand	19%	10%	34%	19%	13%	23%
User Generated Content	19%	27%	24%	12%	19%	19%
Social Networking Sites	14%	11%	3%	16%	17%	21%

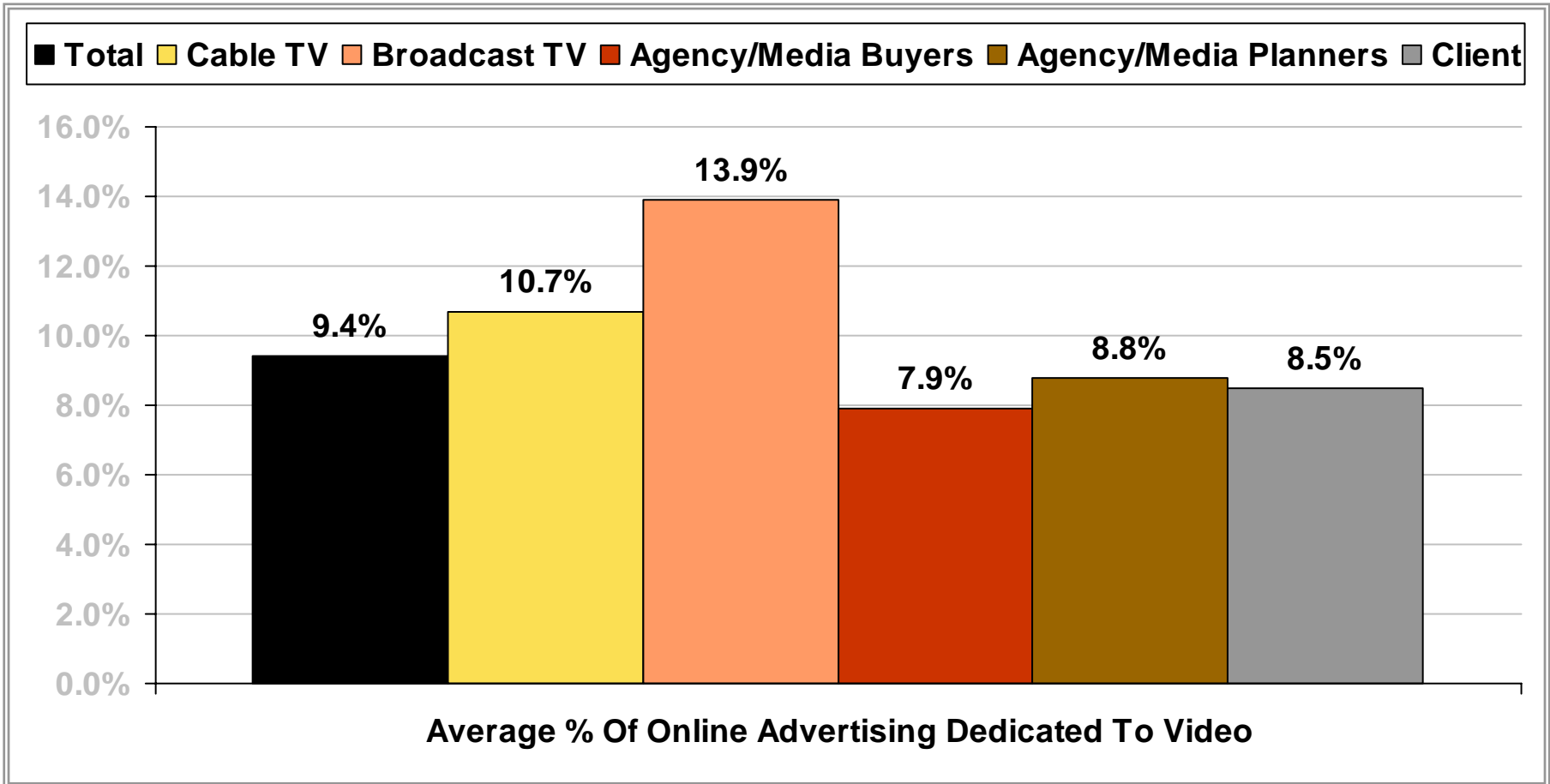
Question: How will advertisers' investment in branded entertainment or product placement change in 2007-08?

■ Total ■ Cable TV ■ Broadcast TV ■ Agency/Media Buyers ■ Agency/Media Planners ■ Client



Average % Investment Change In Branded Entertainment/Product Placement

Question: What percentage of the online advertising you buy or sell this year will be video?





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