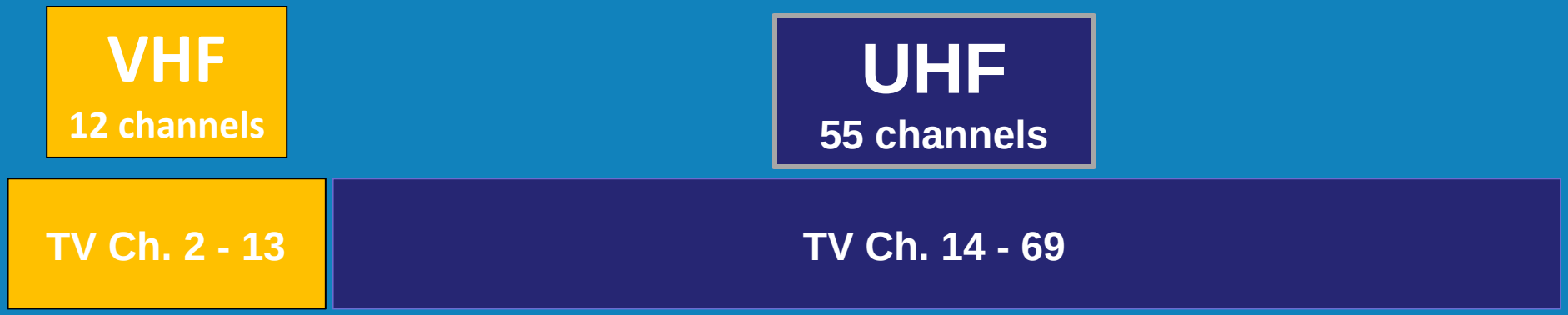
The Potential Impact of the FCC's National Broadband Plan on Broadcasters and Viewers

July 2011

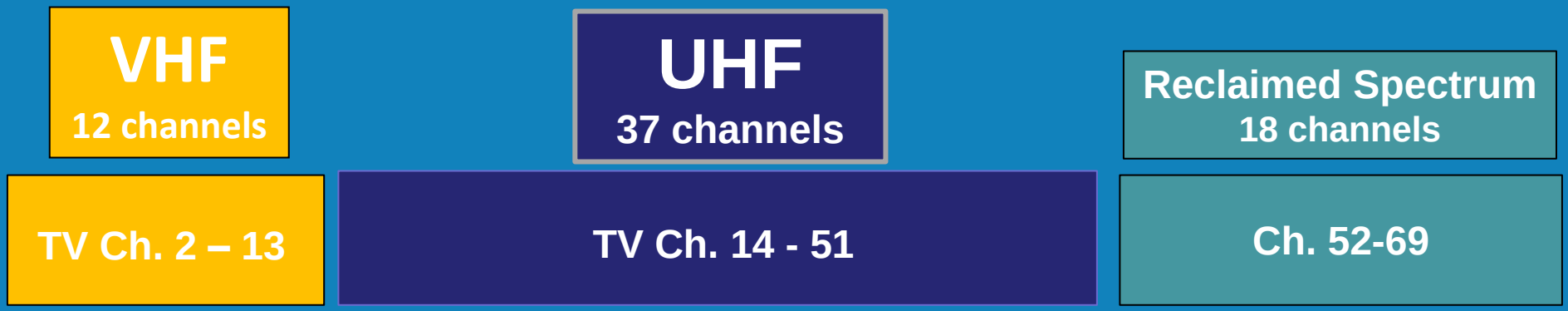
The Incredible Shrinking Free and Local TV Band

Free and Local Broadcast TV Channels Before DTV Transition



VHF: Very High Frequency UHF: Ultra High Frequency

Free and Local Broadcast TV Channels After DTV Transition



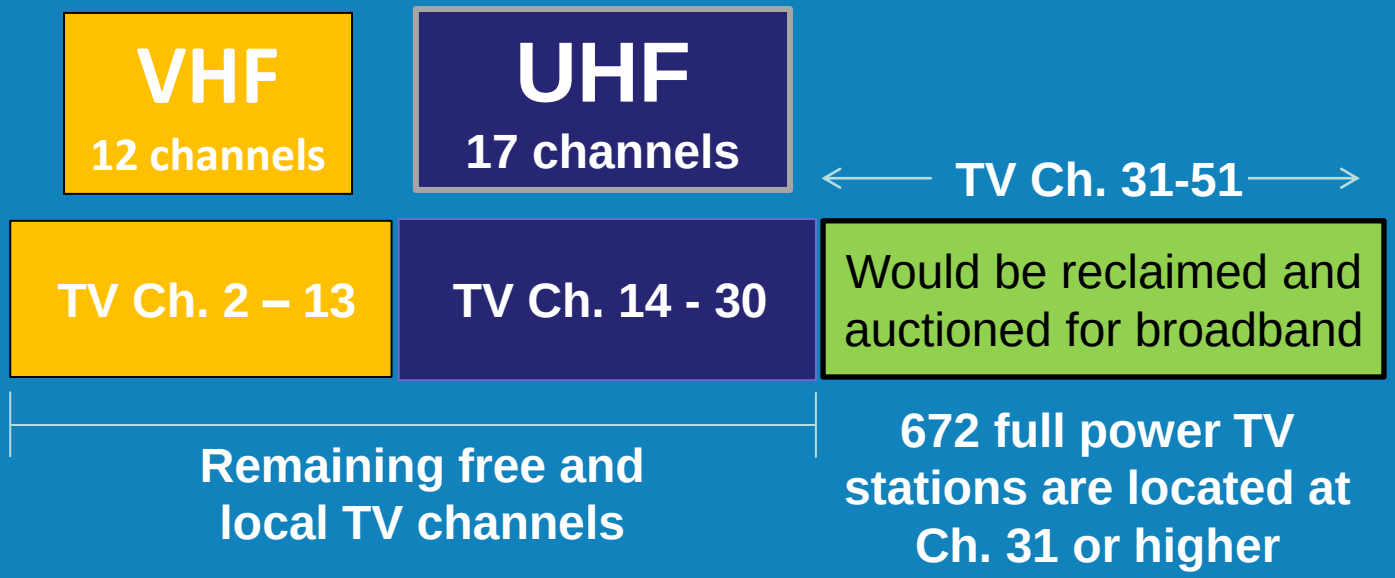
Currently 482 TV stations located in VHF

Currently 1273 TV stations located in UHF

174 full power DTV stations were located at Ch. 52 or higher

VHF: Very High Frequency UHF: Ultra High Frequency

Potential Impact of FCC's National Broadband Plan to Reclaim 20 Broadcast TV Channels



Less Than Half of UHF Band Remains TV Channels

Clearing Free and Local TV Channels From Channels 31-51

Number of Full Power, Class A and LPTV Stations That Are Directly Affected By Reclaiming 20 Broadcast Channels

Station Type	Total Number of Stations	Number of Stations above Channel 30
Full Power	1,735	672
Class A	502	209
LPTV	6,434	3,214
Total	8,671	4,095

Full Power Stations above Ch. 30 by Affiliation

Affiliation	# of Stations above Ch.30	Percent of Total
ABC (incl. O&O)	53	24%
CBS (incl. O&O)	60	27%
NBC (incl. O&O)	75	33%
FOX (incl. O&O)	68	35%
UNIVISION	23	48%
TELEMUNDO	16	73%
ION	43	70%
PBS	106	36%

Affiliation	# of Stations above Ch.30	Percent of Total
MyNetwork	42	66%
CW	50	53%
ETV	11	44%
TELEFUTURA	11	58%
Trinity	18	53%
Independent stations	77	52%

Repacking TV Stations That Stay in Business

Repacking: Forced relocation of TV stations to different channels

Impact of Repacking

Two Classes of Stations:

1. *Stations located in channels 31-51 that elect to stay in business must be relocated to lower channels*

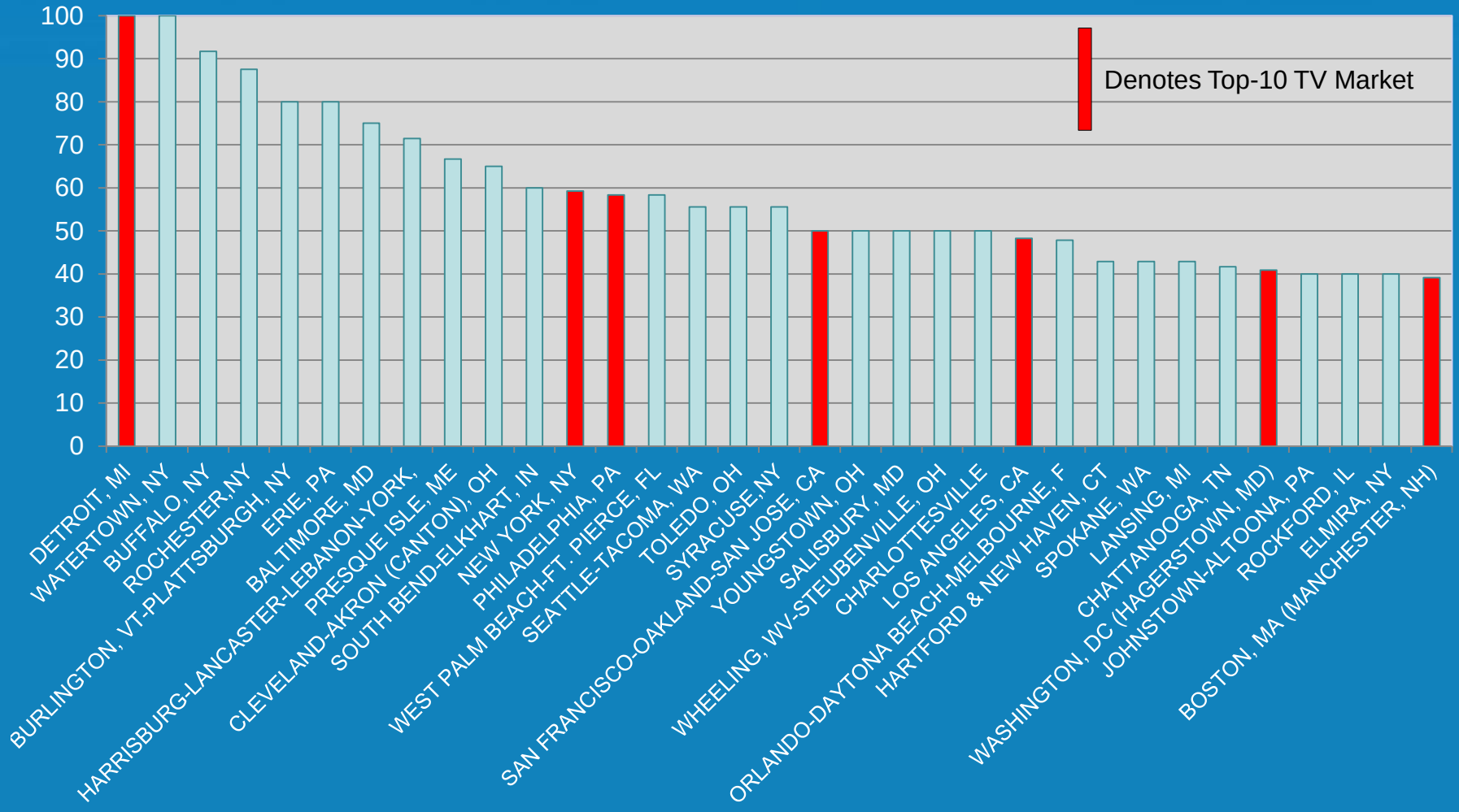
2. *Stations located in channels 2-30 that may have to move due to **repacking** to accommodate displaced stations moving from channels 31-51*

Effect of Repacking on Full Power Stations in Top-10 Markets After Reclamation of 20 Broadcast TV Channels

DMA Ranking	Market	Total Number of Full Power Stations	# of Stations Without Their Own Channel
1	New York, NY	23	11
2	Los Angeles, CA	27	13
3	Chicago, IL	16	4
4	Philadelphia, PA	19	12
5	Boston, MA (Manchester, NH)	21	5
6	San Francisco-Oakland-San Jose, CA	23	13
7	Dallas-Fort Worth, TX	18	1
8	Washington, DC (Hagerstown)	19	5
9	Atlanta, GA	14	0
10	Detroit, MI	9	9

* Accounts for border protection with Canada and Mexico

After Repacking, the Following Markets Will Require 40% or More Stations to Go Off the Air to Reclaim 20 Broadcast TV Channels



* Total full power and Class A stations, accounting for border protection with Canada and Mexico

Disruption to Viewers Caused By Clearing and Repacking of TV Stations

DTV Transition and the National Broadband Plan

2009 DTV Transition

- Recovered 108 MHz (Ch. 52 to 69)
- 174 full power stations on channels 52-69 were cleared
- Stations had analog and digital channels during transition so none had to go off-the-air completely
- About 450 stations changed channels

FCC's National Broadband Plan Incentive Auction Approach

- Proposes to Recover 120 MHz (Ch. 31 to 51)
- 672 full power stations on channels 31 or higher to be cleared
- Minimum of 210 full power stations in top 61 markets must go off-the-air permanently
- 800 to 1200 full power stations likely required to change channels

Viewer Disruption

- During DTV transition, stations had analog channel while switching to digital channel so no viewers experienced a temporary loss of signal

- Between 800 to 1200 full power stations will experience viewer disruption ranging between a few hours to a few weeks while station facilities are modified

  - i.e. construction/modification of transmission tower, installation of new equipment

- Over-the-air viewers will not be the only consumers affected by service disruption while facilities are modified. Cable and satellite subscribers would also not be able to receive broadcast programming.