

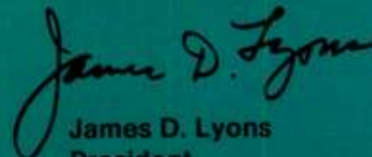
NIelsen REPORT ON TELEVISION 1980

This year Nielsen is embarking on its fourth decade of providing audience research to those involved with the dynamic medium of television. The initial service, Nielsen Television Index (NTI), began operation in 1950, measuring network audiences. This was followed, in 1954, by Nielsen Station Index (NSI) measurements of a number of major markets.

Today NTI provides daily reports on the networks and NSI measures all television markets including metered overnight ratings in four of the top markets.

Our on-going service improvement and expansion program is supported by the numerous clients we serve; commercial and public broadcasters, cablecasters, agencies, sponsors, producers and syndicators. They have contributed many of the features which we have incorporated.

This publication, our 25th annual TV report, heralds the 1980's which promise to be the most revolutionary and exciting years in television's history.

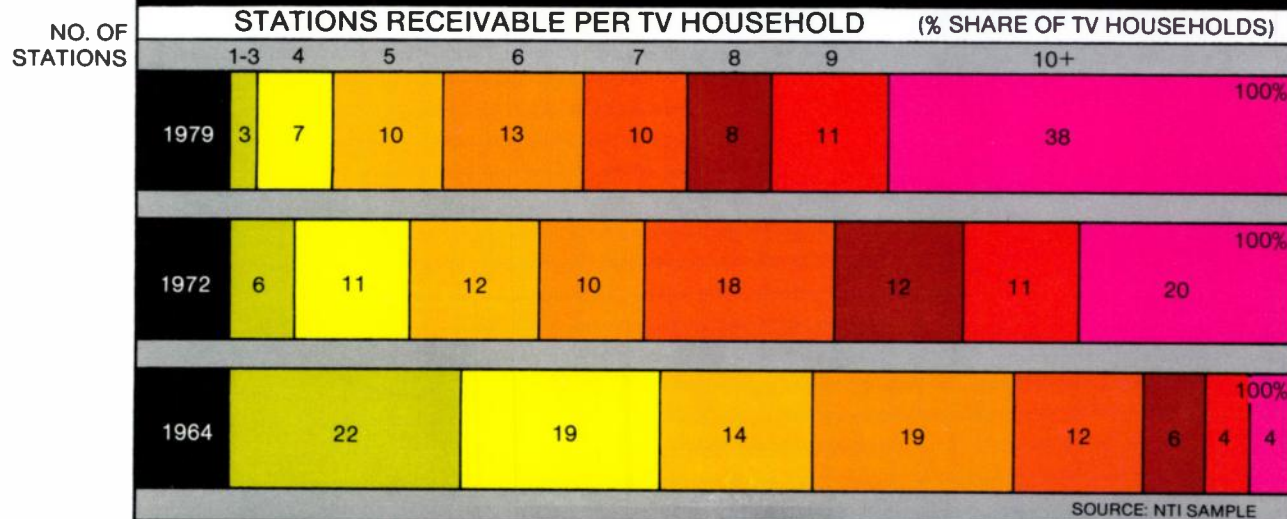


James D. Lyons
President
Media Research Group

MANY STATIONS AVAILABLE TO VIEWERS

As of January 1, 1980 there were 746 commercial and 267 public television stations...a total of 1,013 stations on-the-air in the U.S. according to the Federal Communications Commission.

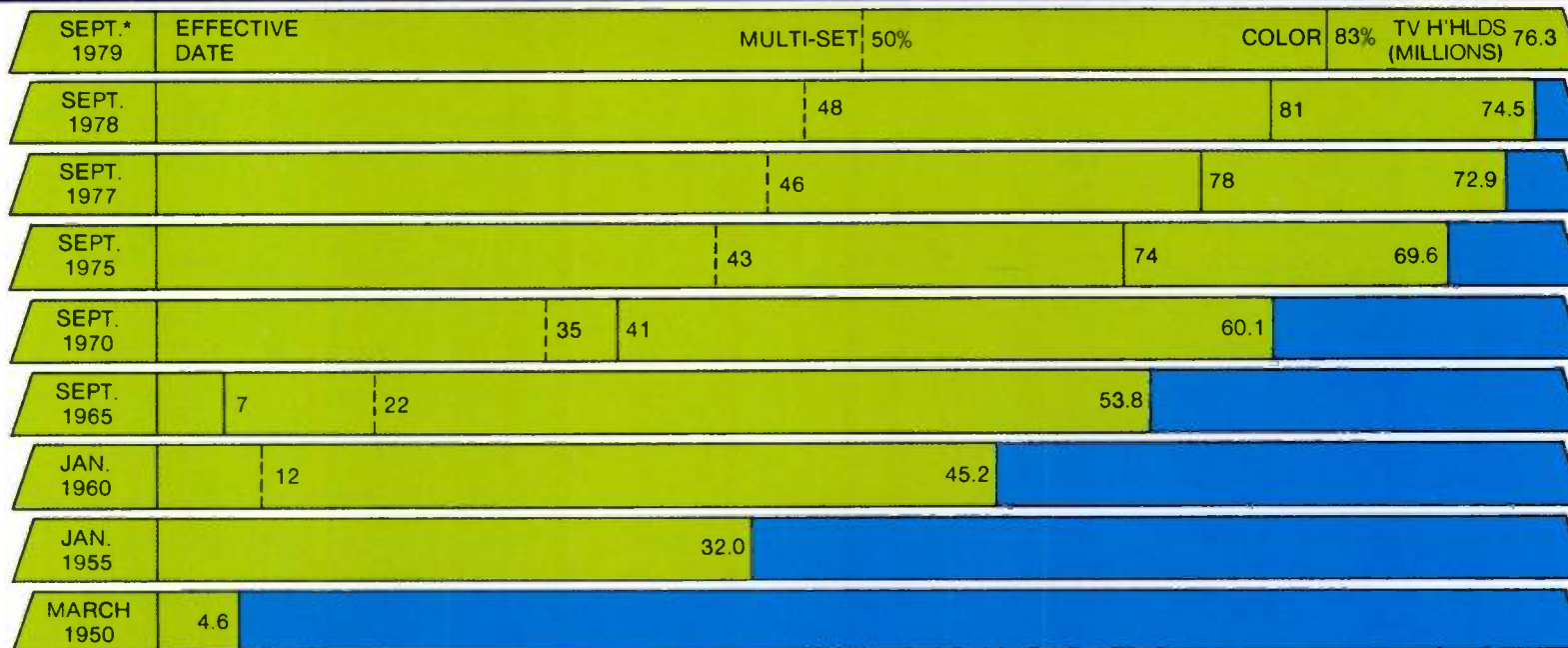
Ninety-seven percent of the country's TV households can receive signals from four or more stations, 67% can receive 7 or more stations and 38% can receive ten or more stations.



NEARLY ALL U.S. HOUSEHOLDS OWN TV; 83% OWN COLOR

Nielsen's annual September update of Television Ownership shows that 76.3 million or 98% of all households in the U.S. own at least one television set.

An estimated 83% own color television sets and half own two or more sets.



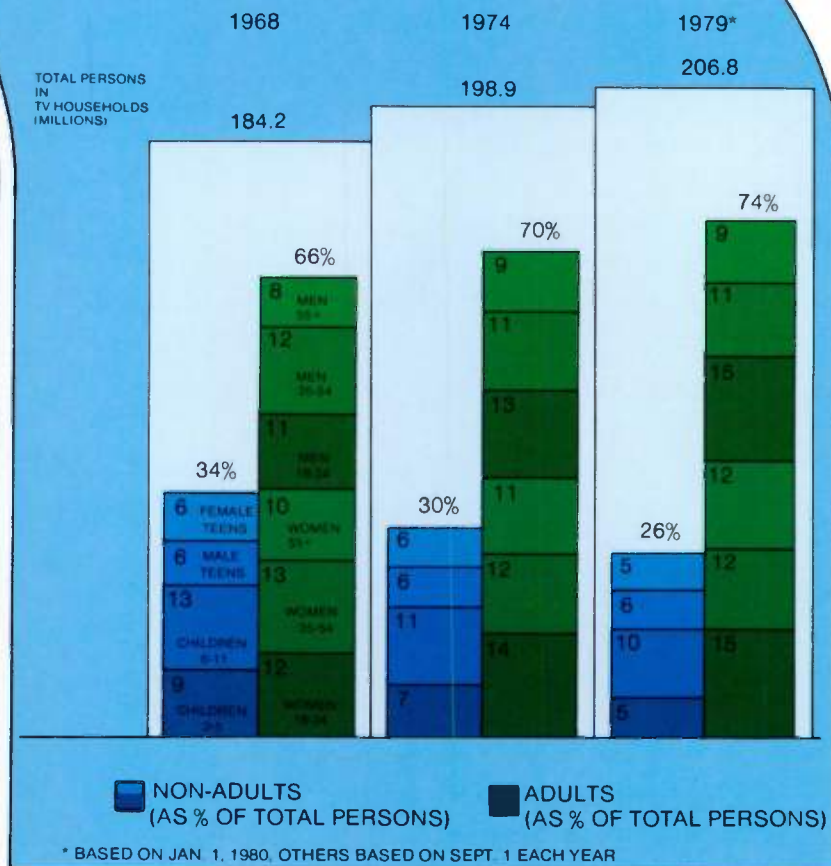
TV OWNERSHIP: U.S. CENSUS 1950-70, NIELSEN ESTIMATES 1975-79
COLOR: ARF CENSUS 1965, NIELSEN ESTIMATES 1970-79

MULTI-SET: U.S. CENSUS 1960-65, NIELSEN ESTIMATES 1970-79
* BASED ON ESTIMATES AS OF JAN. 1, 1980

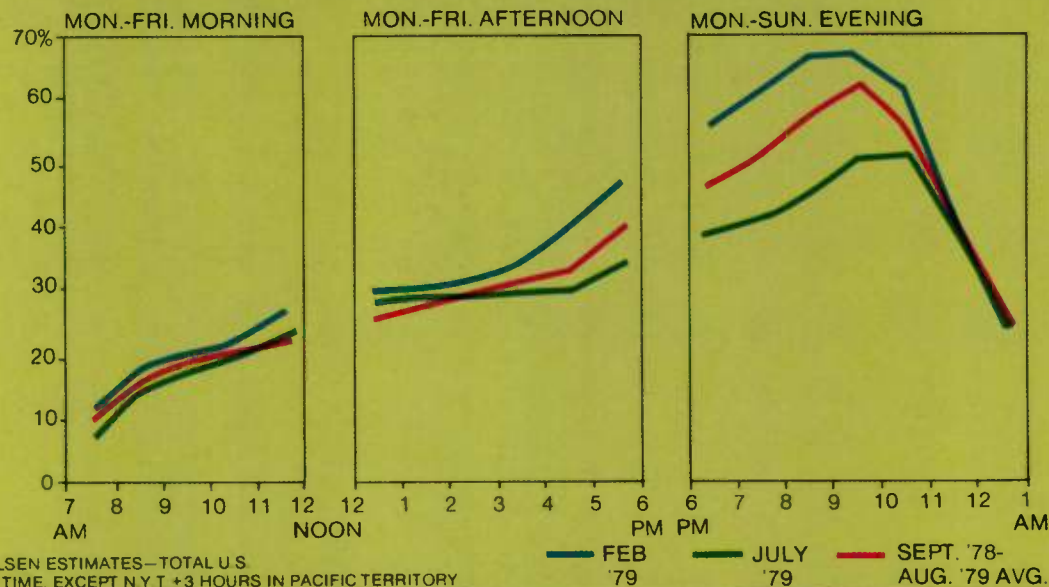
MORE ADULTS, FEWER NON-ADULTS IN TV HOUSEHOLDS

While the total number of persons in TV households has increased 12% since 1968 (206.8 million vs. 184.2 million) the share of the population comprised of adults 18 and over has risen from 66% to 74%.

Children 2-5 and 6-11 have declined both as a percentage of the total population and in actual numbers. Teens have tended to hold their own.



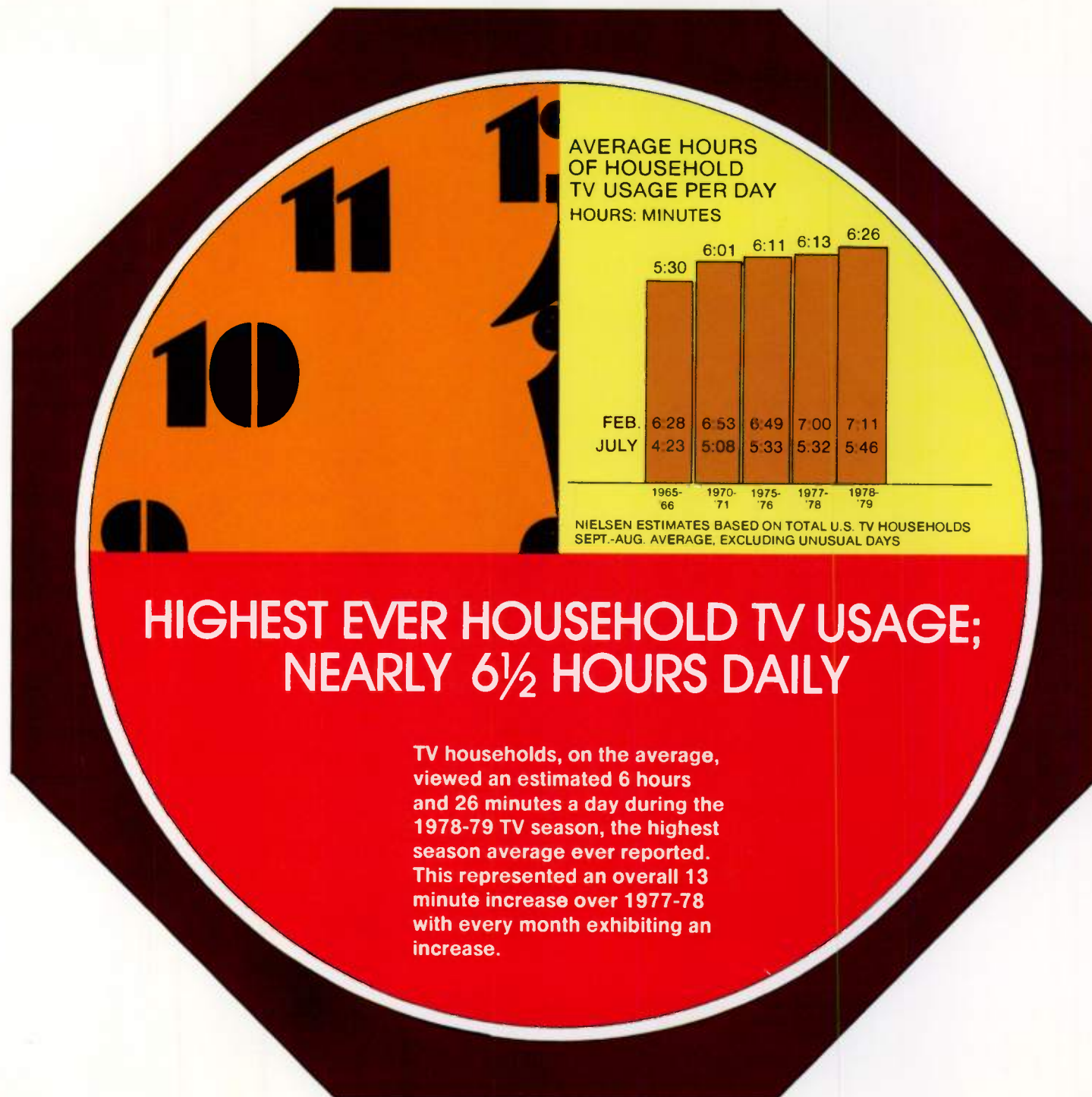
PERCENT OF TV HOUSEHOLDS USING TELEVISION



TV VIEWING PEAKS IN MID-EVENING

Television viewing levels increase throughout the day, reaching a peak generally between 8PM and 10PM. Thereafter, a sharp decline sets in as people go to bed.

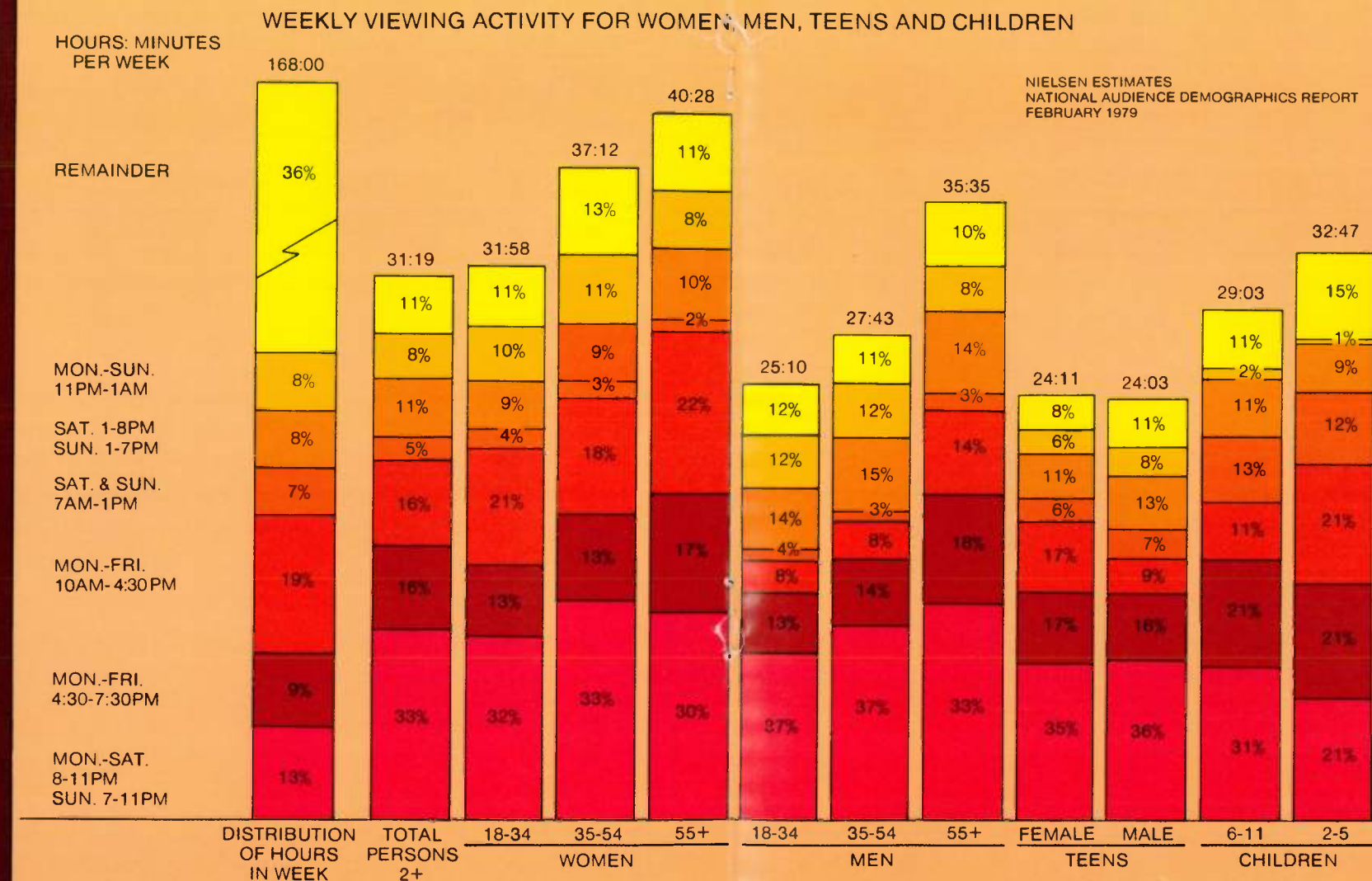
Variation in TV usage levels from winter to summer are quite dramatic in late afternoon and evening hours but less so in early morning and late night hours.



OLDER WOMEN VIEW MOST ... MALE TEENS LEAST

As a general rule, women view more television than men, and older men and women view more than those younger. Also young children view more than those older and teenagers.

Viewing activity is distributed disproportionately throughout the day reflecting the relative availability of each age group. For example, prime time (Monday-Saturday, 8:00-11:00PM & Sunday, 7:00-11:00PM) makes up only 13% of the week's total hours, yet with the exception of children 2-5, accounts for 30% or more of people's viewing.



% SHARE									TEENS 12-17			TOTAL 2+ PERSONS (MILLIONS)
WOMEN			MEN			CHILDREN						
18-34	35-54	55+	18-34	35-54	55+	6-11	2-5					
15	11	14	11	11	11	10	11	6	96.0			



NOVEMBER 1979, EXCLUDES UNUSUAL DAYS

Day	Percentage
MON	92.1
TUE	86.7
WED	87.6
THU	83.9
FRI	84.7
SAT	86.8
SUN	104.7

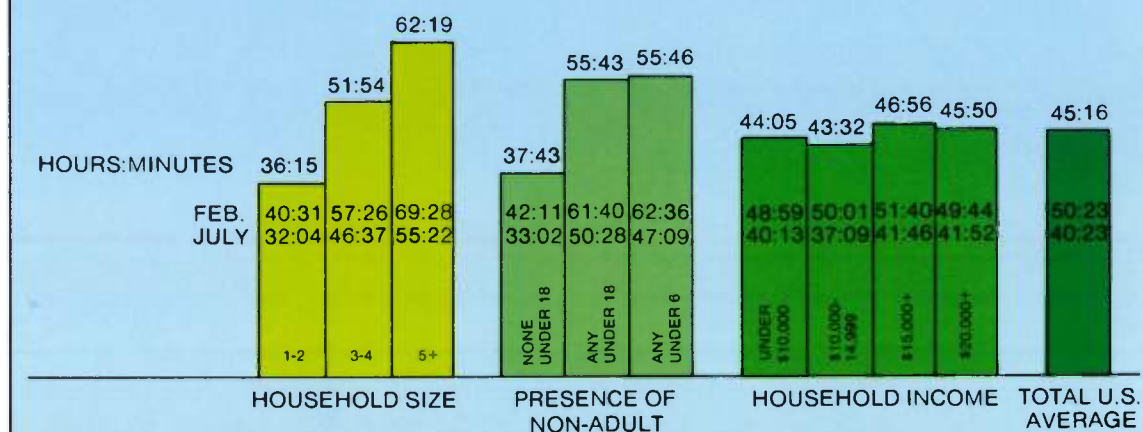
8-11PM EASTERN TIME, EXCEPT 7-11PM SUNDAY

Year after year Sunday evening continues to attract the greatest number of viewers...almost 13 million more than the next most popular night, Monday. The 8:30 to 9:00PM time slot is the most viewed evening (Mon.-Sun.) half-hour period, and women account for the greatest share of viewing throughout the evening.

Even though all types of households view television regularly, certain types view more than do others. Households with five or more persons watch television substantially more than the average U.S. TV household. Those viewing the least are one and two person households and households with no children.

Households with incomes of \$15,000 and over view 2-3 hours more than do lower income households.

MONDAY-SUNDAY 24-HOUR TOTAL



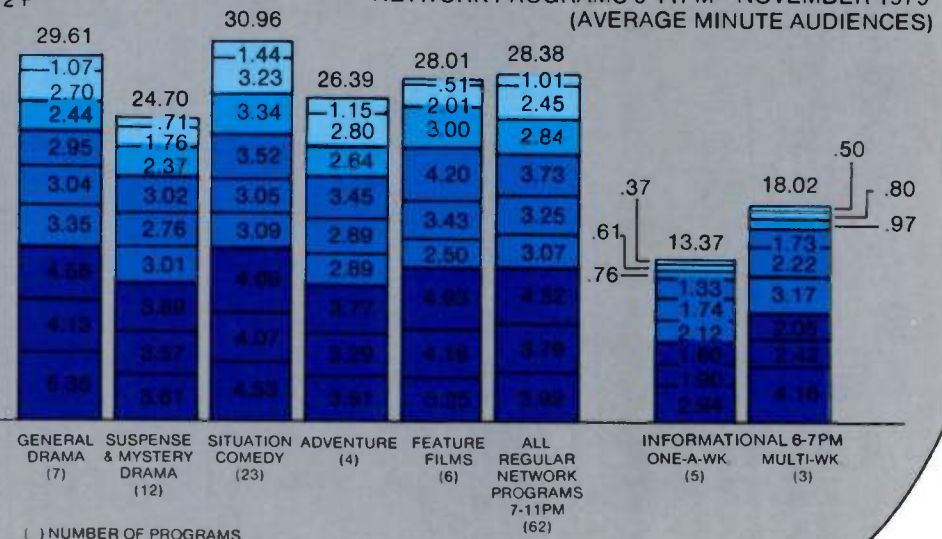
NIELSEN ESTIMATES: NATIONAL AUDIENCE DEMOGRAPHICS REPORT
AVERAGE OF OCTOBER-DECEMBER '78, FEBRUARY, APRIL, MAY, JULY '79

SITUATION COMEDIES MOST POPULAR PROGRAM TYPE

Situation Comedies continue to attract the largest overall audiences during prime time and are the most popular type of program among children and teens. Younger men and women (18-34) preferred feature films, while adults 55+ viewed general drama most.

TOTAL PERSONS 2+
(MILLIONS)

CHILDREN 2-5
CHILDREN 6-11
TEENS 12-17
MEN 18-34
MEN 35-54
MEN 55+
WOMEN 18-34
WOMEN 35-54
WOMEN 55+



PRESIDENTIAL CONVENTIONS AND ELECTION NIGHT VIEWED BY MOST HOUSEHOLDS

Since 1980 is a Presidential election year, we have reviewed the television audiences for major political events during 1976.

Over 85% of U.S. TV households viewed the 1976 political conventions and election night results. Although audiences to the average minute of telecast were not large, the average household reached watched 6-7 hours of each convention and 3 hours of election returns.

POLITICAL TELECASTING

1976

TOTAL U.S. TV HOUSEHOLDS REACHED

PRESIDENTIAL PRIMARIES	REPUBLICAN CONVENTION	DEMOCRATIC CONVENTION	ELECTION NIGHT
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87.9%

88.5%

86.9%

AVERAGE AUDIENCE %

7.6

8.6

7.5

12.5

UNDUPLICATED NETWORK HOURS AIRED

18.5

29.5

30.4

8.7

AVG HOURS MINUTES VIEWED PER HOUSEHOLD REACHED

DNA

7:09

5:53

3:02

DNA: DATA NOT AVAILABLE

OLYMPICS EXHIBIT STRONG AUDIENCE APPEAL

Television coverage of the past 4 Olympics show ratings that averaged over 20% across 42 to 75 hours of telecasting.

Telecast audiences for the most recent Winter Games in Lake Placid ranged from a high of 28.9% to a low of 10.2%.

OLYMPIC TELECASTS

	# TELECASTS	AVERAGE AUDIENCE %		TOTAL HOURS AIRED
		HIGH/LOW	AVERAGE	
SUMMER 1972 (MUNICH)	29	33.3/6.5	20.9	62.8
WINTER 1976 (INNSBRUCK)	24	25.1/9.8	19.4	41.5
SUMMER 1976 (MONTREAL)	33	28.5/9.4	21.3	75.3
WINTER 1980 (LAKE PLACID)	29	28.9/10.2	21.1	53.5



TOP 15 SYNDICATED PROGRAMS

Currently there are well over 300 different programs which independent distributing organizations offer for sale to individual local stations, including network affiliates as well as independent stations. Many of these programs were at one time on network schedules, and many have never been seen on TV as other than "syndicated" programs. As a result, individual stations can supplement network offerings, provide diverse regional programs and offer national programs attuned to the preferences of the local area. The top 15 syndicated programs among different segments of our population, are listed here. The programs are ranked on the basis of their average quarter-hour audience ratings for the total U.S., as reported by Nielsen Station Index during November 1979.

TOTAL U.S. HOUSEHOLDS

PROGRAM NAME	RATING (% U.S.)
MUPPETS	13.0
HEE HAW	11.6
LAWRENCE WELK	11.1
FAMILY FEUD-PM	10.9
M*A*S*H	10.1
HAPPY DAYS, AGAIN	9.8
TIC TAC DOUGH	8.8
NEWLYWED GAME	8.4
DANCE FEVER	7.5
DONAHUE SHOW	7.3
SHA NA NA	7.1
NAME THAT TUNE	6.4
JOKERS WILD	6.1
HOLLYWOOD SQUARES	6.0
SANFORD & SON	6.0

WOMEN 18+

PROGRAM NAME	RATING (% U.S.)
LAWRENCE WELK	9.7
FAMILY FEUD-PM	8.8
MUPPETS	8.8
HEE HAW	8.7
TIC TAC DOUGH	7.1
M*A*S*H	6.9
NEWLYWED GAME	6.5
DANCE FEVER	5.8
DONAHUE SHOW	5.8
HAPPY DAYS, AGAIN	5.5
NAME THAT TUNE	5.2
SHA NA NA	5.0
JOKERS WILD	4.8
HOLLYWOOD SQUARES	4.6
PM MAGAZINE	4.0

MEN 18+

PROGRAM NAME	RATING (% U.S.)
HEE HAW	8.6
MUPPETS	7.7
FAMILY FEUD-PM	6.8
M*A*S*H	6.7
LAWRENCE WELK	6.7
NEWLYWED GAME	5.3
TIC TAC DOUGH	5.2
HAPPY DAYS, AGAIN	4.8
DANCE FEVER	4.6
SHA NA NA	4.2
WILD KINGDOM	4.1
NAME THAT TUNE	3.8
HOLLYWOOD SQUARES	3.7
IN SEARCH OF	3.7
SANFORD & SON	3.6

TEENS 12-17

PROGRAM NAME	RATING (% U.S.)
HAPPY DAYS, AGAIN	12.0
MUPPETS	8.8
M*A*S*H	7.4
DANCE FEVER	6.9
BRADY BUNCH	6.2
SANFORD & SON	6.0
HEE HAW	5.4
SHA NA NA	5.3
GILLIGAN'S ISLAND	5.2
FAMILY FEUD-PM	5.1
NEWLYWED GAME	4.5
TOM AND JERRY	4.1
CAROL BURNETT & FRIENDS	3.9
TIC TAC DOUGH	3.8
I LOVE LUCY	3.5
BUGS BUNNY	3.5

RANKING OF SYNDICATED PROGRAMS BASED ON NIELSEN STATION INDEX NOVEMBER 1979 REPORT ON SYNDICATED PROGRAMS

CHILDREN 2-11

PROGRAM NAME	RATING (% U.S.)
MUPPETS	19.1
HAPPY DAYS, AGAIN	12.7
TOM AND JERRY	9.6
BRADY BUNCH	9.0
BUGS BUNNY	7.7
SHA NA NA	7.7
GILLIGAN'S ISLAND	7.5
HEE HAW	7.4
DANCE FEVER	7.3
FLINTSTONES	7.1
FAMILY FEUD-PM	6.4
POPEYE	5.9
WOODY WOODPECKER	5.9
SANFORD & SON	5.9
M*A*S*H	5.7

NIelsen TOP 15 PROGRAMS

Many different programs rank in television's top 15 in the course of a year. Those shown here were the regular network programs that ranked in the top 15 during Nielsen Television Index measurements from October through December, 1979.

The size of a program's audience is but one of a number of ways to assess its worth or success. For example, many programs below the top 15 or 20 are successful because they appeal to a specific target audience that advertisers wish to reach.

TOTAL U.S. HOUSEHOLDS

PROGRAM NAME	AVERAGE AUDIENCE %
60 MINUTES	28.8%
THREE'S COMPANY	27.5
ALICE	27.1
M*A*S*H	25.7
JEFFERSONS	25.5
ONE DAY AT A TIME	25.1
DALLAS	24.6
EIGHT IS ENOUGH	23.9
TAXI	23.9
ARCHIE BUNKER'S PLACE	23.8
WKRP IN CINCINNATI	23.3
LITTLE HOUSE-PRAIRIE	23.3
HAPPY DAYS	22.3
ANGIE	22.3
DUKES OF HAZZARD	22.1

WOMEN 18+

(% PERSONS IN TV HOUSEHOLDS)

ALICE	22.9%
60 MINUTES	22.3
JEFFERSONS	21.7
DALLAS	21.3
THREE'S COMPANY	21.0
ONE DAY AT A TIME	20.9
LITTLE HOUSE-PRAIRIE	20.4
M*A*S*H	19.5
ARCHIE BUNKER'S PLACE	19.4
EIGHT IS ENOUGH	18.7
TAXI	18.5
TRAPPER JOHN, M.D.	18.2
WKRP IN CINCINNATI	17.8
ANGIE	16.9
LOVE BOAT	16.5

MEN 18+

(% PERSONS IN TV HOUSEHOLDS)

60 MINUTES	24.1%
NFL MON. NT. FOOTBALL	19.3
NFL FOOTBALL GAME 2-NBC	18.1
ABC SUNDAY NIGHT MOVIE	17.9
ARCHIE BUNKER'S PLACE	17.7
ALICE	17.6
ONE DAY AT A TIME	17.1
THREE'S COMPANY	16.5
JEFFERSONS	16.4
CBS NFL FOOTBALL GAME 1	15.9
M*A*S*H	15.7
DUKES OF HAZZARD	15.2
MORK & MINDY	15.2
TAXI	15.0
DALLAS	15.0

TEENS 12-17

(% PERSONS IN TV HOUSEHOLDS)

MORK & MINDY	22.1%
THREE'S COMPANY	20.8
M*A*S*H	19.3
ABC SUNDAY NIGHT MOVIE	18.8
EIGHT IS ENOUGH	18.5
WKRP IN CINCINNATI	17.9
WHITE SHADOW	17.3
TAXI	16.9
DUKES OF HAZZARD	16.8
HAPPY DAYS	16.7
BUCK ROGERS-25th CENTURY	16.7
SOAP	15.5
CHIPS	15.1
SATURDAY NIGHT LIVE	14.8
ANGIE	14.8

TOP 15 REGULARLY SCHEDULED NETWORK PROGRAMS

(15 MINUTES OR LONGER)

OCTOBER-DECEMBER 1979
NIELSEN AVERAGE AUDIENCE ESTIMATES
4 OR MORE TELECASTS

CHILDREN 2-11

(% PERSONS IN TV HOUSEHOLDS)

MORK & MINDY	27.1%
DUKES OF HAZZARD	26.0
DISNEY'S WONDERFUL WORLD	22.8
EIGHT IS ENOUGH	20.8
HAPPY DAYS	20.6
B BUNNY/ ROAD RUNNER 3	20.1
B BUNNY/ ROAD RUNNER 2	19.6
INCREDIBLE HULK	19.3
BUCK ROGERS-25th CENTURY	19.0
THREE'S COMPANY	19.0
CHIPS	18.6
LITTLE HOUSE-PRAIRIE	18.2
ANGIE	17.1
ALL NEW POPEYE HOUR 1	17.0
SCOOBY AND SCRAPPY DOO 1	16.9

CABLE IN 20% OF U.S. TV HOMES

Over the last year, cable has grown by almost 12%, bringing current penetration estimates to approximately 20% of U.S. TV households. February 1980 estimates show that about 15,147,470 TV households subscribed to a cable service.

Cable penetration (cable households as a percentage of all TV households) continues to be higher, generally, in the less urban markets. Fifty-two percent of cable homes are located in the smaller C and D size counties.

CABLE PENETRATION

COUNTY SIZE	TV HOUSEHOLDS (JAN. 1, 1980)	CABLE HOUSEHOLDS (FEB. 1, 1980)	PENETRATION %
A	29,436,760	2,687,160	9.0
B	21,916,260	4,603,250	21.0
C	13,803,730	5,188,810	38.0
D	11,419,240	2,668,250	23.0
TOTAL U.S.	76,575,990	15,147,470	19.8

DESIGNATED MARKET AREA RANK BY CABLE PENETRATION	DMA TV * HOUSEHOLDS	% PENETRATION
Lima	35,640	71
Yuma-El Centro	53,020	70
Santa Barbara-Santa Maria	159,360	69
Parkersburg	52,290	66
Alpena	11,330	64
Casper-Riverton	48,980	63
Zanesville	28,720	62
Johnstown-Altoona	285,890	61
Biloxi-Gulfport	49,990	61
Grand Junction-Montrose	44,920	61
Bakersfield	107,040	61
Marquette	55,430	59
Roswell	50,830	58
Gainesville	54,800	58
Utica	98,280	57
Hagerstown	104,770	56
Odessa-Midland-Monahans	111,950	56
Glendive	4,890	56
Monterey-Salinas	160,120	56
San Angelo	32,090	55
Beckley-Bluefield-Oak Hill	141,010	55
Wilkes Barre-Scranton	453,860	55
Clarksburg-Weston	74,340	55
Tyler	78,270	55
Abilene-Sweetwater	105,340	55
Cheyenne-Scottsblf-Sterling	60,540	55

*NIELSEN ESTIMATES JANUARY 1, 1980