NOT
YOUR
AVERAGE
DAY

abc

daytime

Syndication Doesn't Come Close

	WORKING WOMEN 18-49 (000)
All My Children	**1,290**
General Hospital	**1,020**
One Life To Live	**1,000**
Jenny Jones	860
Live-Regis & Kathie Lee	680
Montel Williams	730
Oprah Winfrey	1,510
Ricki Lake	1,030
Sally Jessy Raphael	660
Syndicated Talk Avg.	580

NTI, 9/26/94-1/1/95

abc daytime

Top Cable Networks Can't Compete

	WOMEN 18-49			
	(000)	% ABC ADV.	VPVH	% ABC ADV.
abc Daytime	2,220	–	.516	–
Cable Networks				
TBS	350	+ 534%	.359	+ 44%
USA	120	+1,750%	.266	+ 94%
A&E	120	+1,750%	.226	+128%
TNT	180	+1,133%	.462	+ 12%
Lifetime	80	+2,675%	.514	NC

NTI, 9/26/94-1/1/95

abc daytime

WHY PAY MORE FOR OPRAH?

[illegible]

NTI 7/4 9/25/94

ALL MY CHILDREN IS A FAR BETTER VALUE.

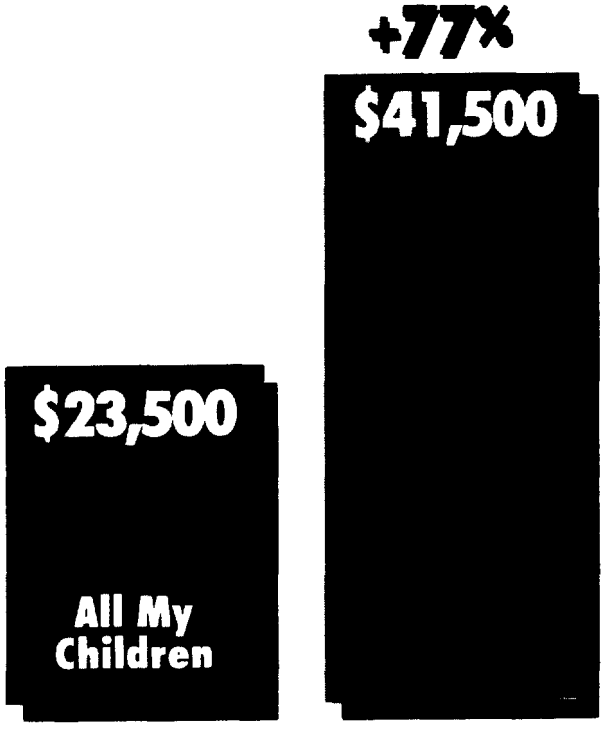
It's true.

A :30 unit on the Oprah Winfrey Show costs nearly **double** that of ABC Daytime's All My Children, despite the fact that **both shows deliver identical levels of young women audiences.**

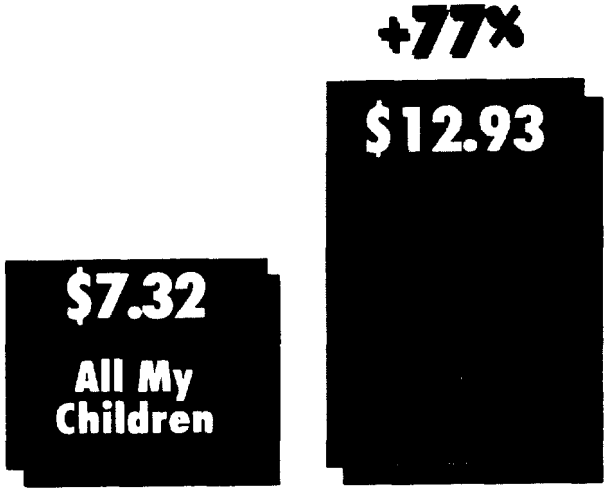
This combination of higher unit costs and comparable audience translates to a significantly higher CPM for Oprah vs. All My Children -- **77% higher** to be exact.

Women 18-49

Unit Cost



CPM



Competitive Media Reporting, 3rd Qtr. 1994

To reach the most young women
at the most efficient pricing,
turn to ABC Daytime's All My Children.
Then no one will ask,
Why **did** you pay more
for Oprah?

abc daytime

BALANCE OF

A B C N E W S

Balanced Composition

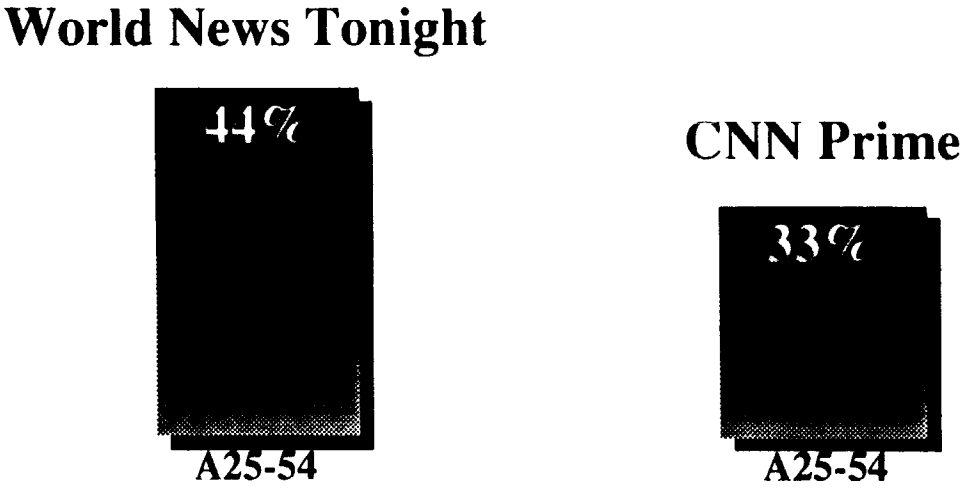
	Adults 25-54	
	% Women	% Men
U.S. Population	51	49
ABC World News Tonight	**54**	**46**
Avg. Prime Access Syndication	59	41

NTI, 9/27/93-12/26/93

ABCNEWS POWER

A25-54 Power Shortage: CNN

% Adults 25+



Only One Third Of CNN's Adult Audience Is 25-54

NTI, 4th Qtr. 1993, NHI 4th Qtr. 1993

ABCNEWS POWER

The

POWER

of

NETWORK TELEVISION

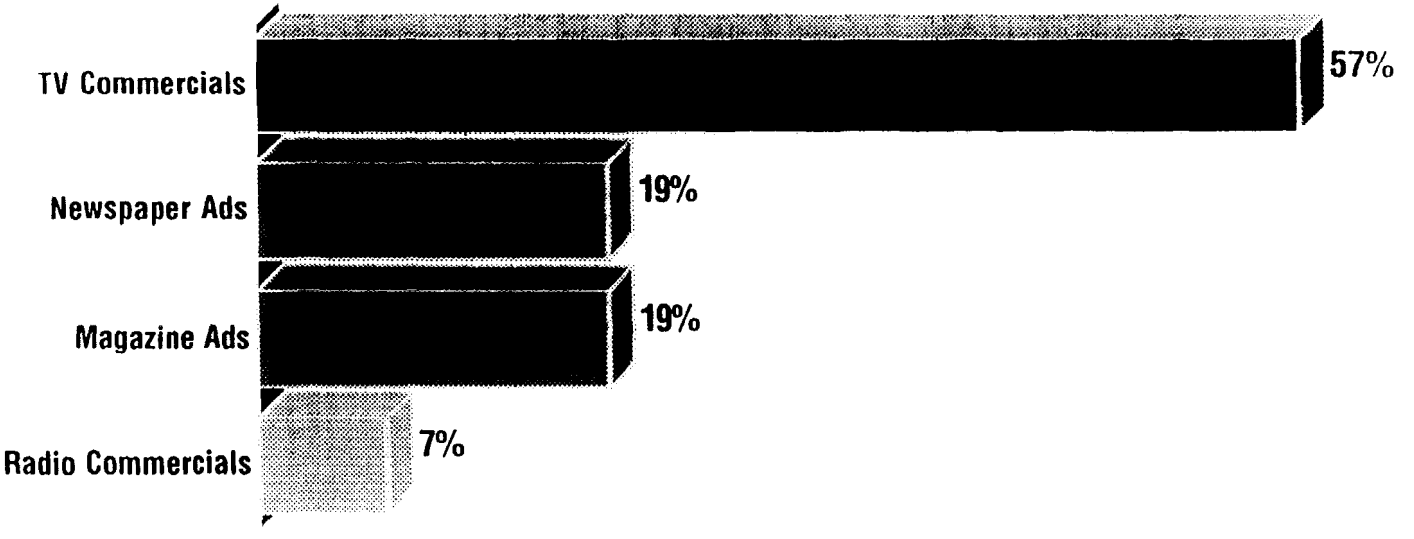
TODAY'S PROLIFERATION OF MEDIA CHOICES

DBS
Magazines
On-Site Media
Trade Promotion
Spot TV
Cable Networks
Spot Radio
Outdoor

FSI
Newspapers
Interactive Media
Consumer Promotion
Local Cable
Network Radio
Direct Mail
Syndication

Network TV

WHERE CONSUMERS LEARN ABOUT PRODUCTS



Source: *The Roper Organization*, July 1993

NETWORK TELEVISION: THE CHOICE FOR ADVERTISERS

- *National Penetration*
- *Mass Reach*
- *Demographic Targetability*
- *Quality Environment*
- *Accountability*

NATIONAL HOUSEHOLD PENETRATION

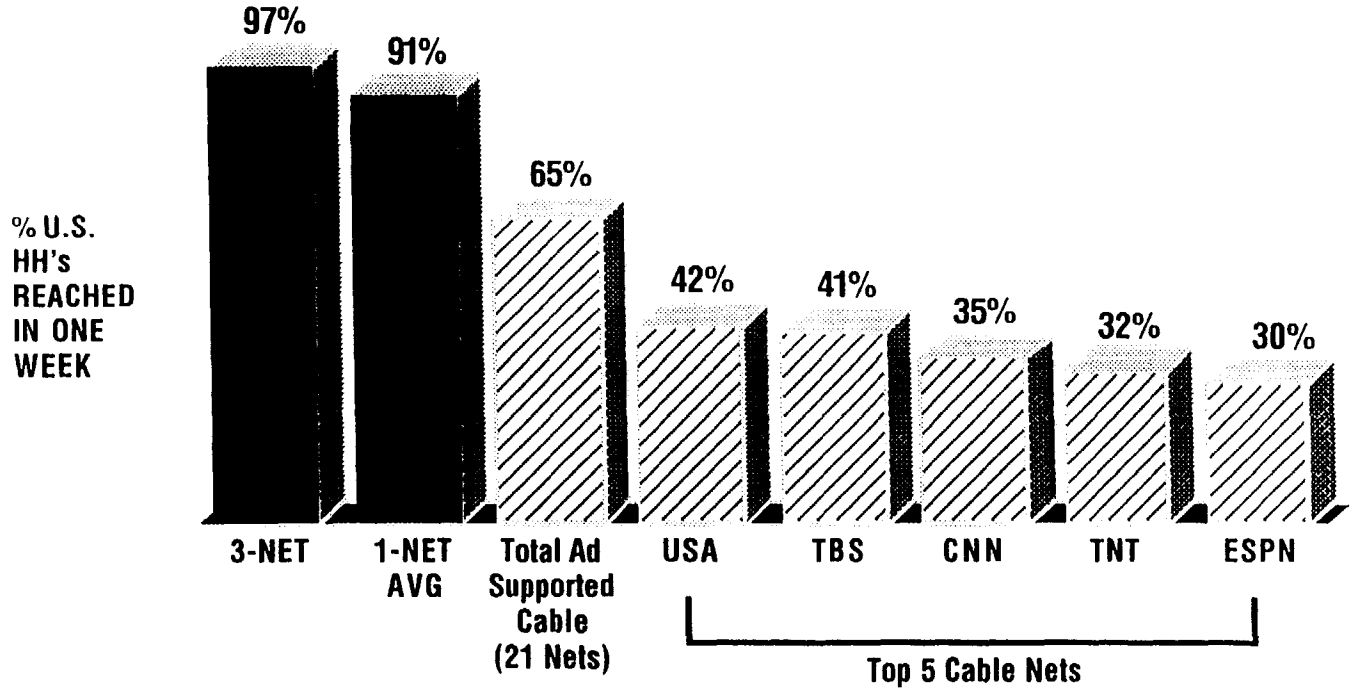
ACCESS TO AMERICA

- *Network TV Penetrates 98% Of U.S. Households*
- *Cable TV Penetrates Only 65% Of U.S. Households, Even Though 96% Of U.S. Homes Are Currently Passed By Cable*
- *Only 30% Of Syndicated Programs Clear More Than 90% Of The U.S.*

Source: *Marketer's Guide to Media*, Fall/Winter 1993-94; Veronis, Suhler & Assoc., *Communications Industry Report*, 1993

MASS REACH

UNRIVALED NATIONAL DELIVERY



Source: NHI Cable Activity Report, First Qtr. 1993, 24-Hour Reach

MASS REACH

TOP FIVE NBC ENTERTAINMENT PROGRAMS

	HH DELIVERY
Seinfeld	17,710,000
Frasier	16,014,000
Monday Night Movie	13,565,000
Fresh Prince	13,471,000
Wings	13,282,000

TOP FIVE AD-SUPPORTED CABLE ENTERTAINMENT PROGRAMS

Geronimo (TNT)	*4,025,000*
Return Of The Jedi (USA)	*2,841,000*
Back To The Future (USA)	*2,824,000*
The Substitute (USA)	*2,682,000*
The Empire Strikes Back (USA)	*2,635,000*

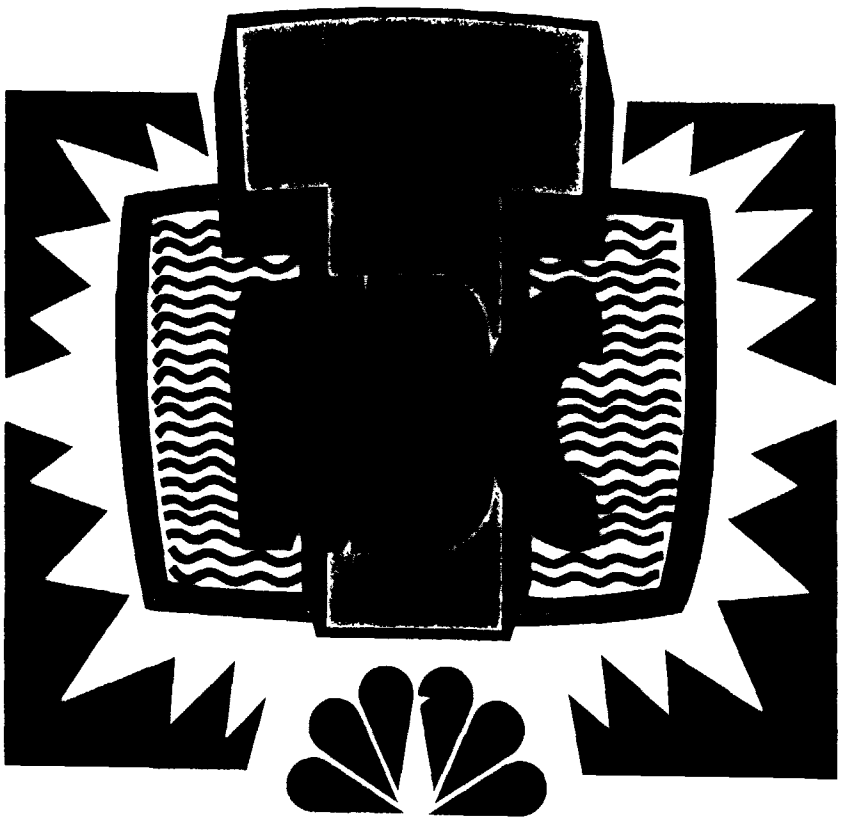
Source: NTI, NHI 9/20/93 - 12/27/93

The POWER *of* NETWORK TELEVISION

TARGETED DELIVERY

	RATING	DELIVERY
NEWS	Adults 25-54	
Nightly News (Mo-Fr)	4.3	4,710,000
Today Show (Mo-Fr)	2.2	2,360,000
CNN (Mo-Fr, 7:30-8pm)	.3	350,000
DAYTIME	Women 18-49	
Days of Our Lives (Mo-Fr)	4.1	2,510,000
Lifetime (Sa-Su, 4:30-7pm)	.6	390,000
PRIME	Adults 18-49	
NBC Sunday Night Movie	8.8	10,650,000
TBS (Mo-Fr, 8-11pm)	.9	1,080,000
LATE NIGHT	Adults 18-34	
Saturday Night Live	6.4	4,160,000
MTV (Mo-Fr, 11-11:30pm)	1.0	630,000
SPORTS	Men 18-49	
NFL Single Game (Su, 1-4)	9.8	5,880,000
ESPN (Mo-Su, 8-11pm)	1.2	700,000

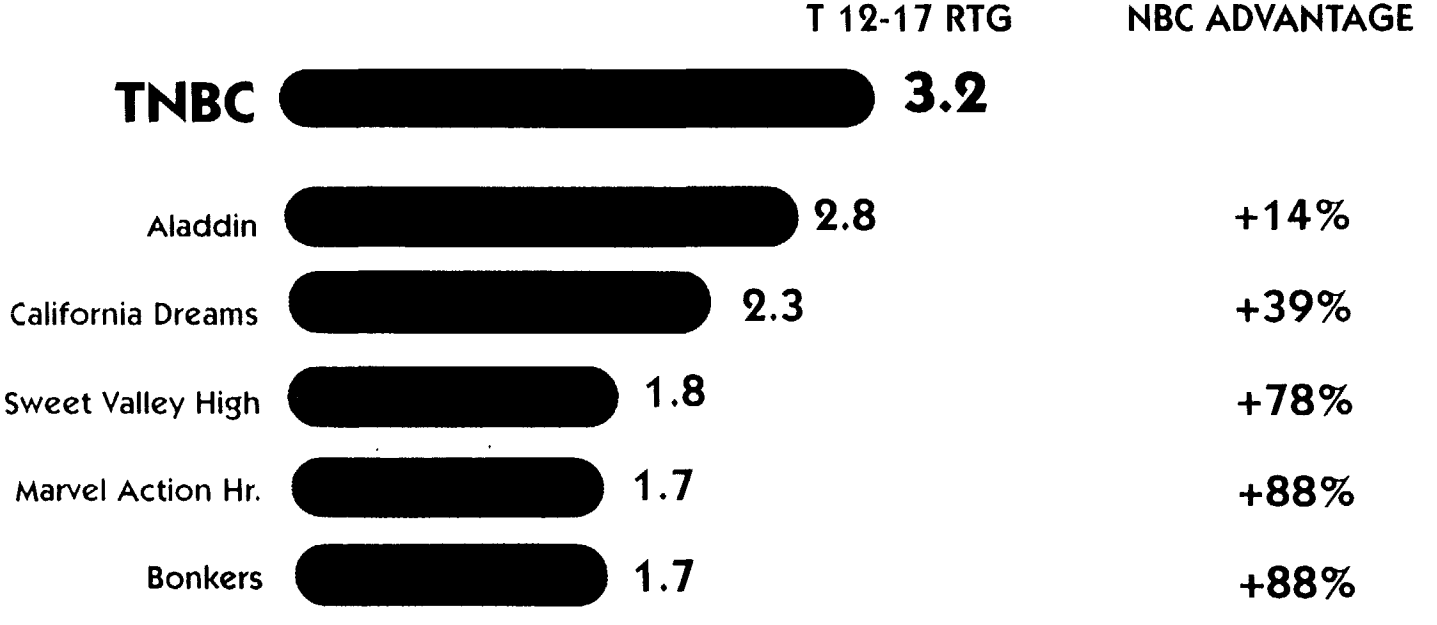
Source: Nielsen Cable Activity Report, NTI, 9/27/93 - 12/19/93 (All Times NYT)



TV's Field of Teens

TNBC DELIVERS

Outperforms Top 5 Syndicated Kids' Programs



Source: NTI 9/5/94-12/25/94, NSS 9/5/94-12/11/94 (excludes programs with less than five telecasts)

TNBC DELIVERS

Ranks Among Top 10 Syndicated Programs

		T 12-17 RTG
1	Fresh Prince (Syn)	6.6
2	Simpsons (Syn/M-F)	5.8
3	Family Matters (Syn)	5.6
4	Baywatch	5.0
	Roseanne (Syn/M-F)	5.0
5	Married w/ Children (Syn)	4.5
6	Star Trek Deep Space Nine	4.3
7	Simpsons (Weekend)	4.2
8	World Wrestling Federation	3.8
9	Ricki Lake	3.4
10	**TNBC**	**3.2**

Source: NTI 9/5/94-12/25/94, NSS 9/5/94-12/11/94 (excludes programs with less than five telecasts)

TNBC DELIVERS

More Teens in 2 Hours Than MTV in 22

4 Spots On TNBC > **44** Spots On MTV

Source: NTI Cume Facility; one spot/half hour, 1/16/95 – 1/22/95; NBC: Saturday 10a-12n; MTV: Saturday and Sunday 8a-7p

ANDREWS OFFICE PRODUCTS CAPITOL HEIGHTS, MD (K)

APPENDIX J

Cabletelevision Advertising Bureau, *1994 Cable TV Facts,* excerpt

1994 CABLE TV FACTS

CAB

MARKETING VALUE

Cable's ability to target desirable audiences with minimum waste is creating new marketing opportunities for national regional and local advertisers. Cable's selectivity, however should not be confused with small audience levels. Advertisers who have made major commitments to cable know this: a broad mix of cable networks can achieve outstanding levels of reach against the target audience.

- UPSCALE REACH
  Cable subscribers are considerably more upscale than non-cable homes, with the gap between the two growing wider. In addition to being younger and better-educated than non-cable homes, the cable universe now accounts for the vast majority of the nation's total household income. Just as important, cable's share of total day upscale viewing is substantial in all key demographics.

  By developing a schedule that includes multiple cable networks, advertisers can reach most of the nation's upscale homes.

- CONSUMPTION OF PRODUCTS AND SERVICES
  Cable households are more likely than non-cable households to purchase products and services in such key advertising categories as travel, leisure activities, food and beverage, automotive, shopping and retail, consumer electronics, financial/investment, home appliances and home furnishings.

Viewers To Basic Cable Programming Are Upscale

Cable offers advertisers the opportunity to reach young, educated and affluent households which also exhibit high levels of employment.

Household Income	Total U.S.	Cable* Network	Prime-time TV	Radio	News-paper	Maga-zine
$75,000+	100	123	94	109	113	109
$40,000-$75,000	100	114	98	107	108	106
$20,000-$40,000	100	97	102	100	99	102
Under $20,000	100	76	103	87	85	87
Education						
College Graduate	100	107	97	106	113	108
Attended College	100	107	97	108	106	110
HS Graduate	100	103	102	101	101	101
Not HS Graduate	100	81	102	86	79	80
Occupation						
Executive/Managerial/ Administrative	100	116	98	109	111	108
Professional	100	106	94	111	113	112
Employed Full-Time	100	106	98	109	103	105
Not Employed	100	92	105	86	94	92
Household Size						
3+ persons	100	104	99	105	100	103
2	100	102	101	95	103	100
1	100	75	99	90	93	89
Age						
18-49	100	102	98	109	99	105
25-54	100	104	99	108	102	103
55+	100	93	105	80	101	88

*Any viewing past week

(Source: MRI, Fall 1993)