

Putting The Finger On Yellow Pages Advertising

The Size Of The Industry

According to the Yellow Pages Publishers Association (YPPA), a Troy, MI-based group representing the publishers that produce more than 96% of all the U.S. Yellow Pages directories and generate almost 99% of the medium's revenue, Yellow Pages advertising revenues will total \$8.3 billion in 1989. Of this amount, \$7.3 billion (88%) are local advertising dollars.

Yellow Pages publishers have all but abandoned forays into one another's territory. Though there is still significant competition in about 25 markets among the traditional utility, independents and "invading" regional Bell operating companies, the ReBOCs, responsible for about 75% of annual revenues, are now turning their attention to their core business. As Ed Schenk, senior vice president, Wahlstrom & Co. (Foote, Cone & Belding's Yellow-Pages unit), states: "Competition between publishers is definitely dying down and publishers are turning their attention elsewhere. It was a free-for-all, with 'Let's go here and let's go there.' I think they've had some tough times in the market. There seems to be more of a focus now on enhancing their product within their own regions."

Yellow Pages Ad Revenues (In Billions)

Year	National	Local	Total
1989(est.)	\$1.0	\$7.3	\$8.3
1988	.9	6.8	7.7
1986	.8	5.7	6.5
1984	.6	4.3	4.9
1982	.4	3.3	3.7
1980	.3	2.5	2.8

Source: Yellow Pages Publishers Association

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Yellow Pages Revenue And Number Of Directories

The nine leading Yellow Pages companies, which include the seven Baby Bells and two independents, are responsible for \$6.2 billion+* in Yellow Pages revenue and account for 4,803 of the 6,200 published directories.

A total of 418 million copies of Yellow Pages directories were produced in 1988 by 206 publishers.

The Leading Yellow Pages Companies: Ad Revenues (In Millions) And Number Of Directories

Rank	Company	Yellow Pages Ad Revenue (In Millions)	# Of Titles
1	GTE	\$1,300	1,000
2	BellSouth	1,000	517
3	Bell Atlantic	830	300
4	Pacific Telesis/ Pacific Bell Dir.	789	103
5	Southwestern Bell	722	1,100
6	U.S. West	700	300+
7	Ameritech	495	500
8	Dun & Broadstreet/ R.H. Donnelley	442	650
9	NYNEX*	N/A	332
	Totals	\$6,278	4,803

*NYNEX does not break out revenue data, but industry analysts believe it ranks in the top five companies.

Source: Advertising Age, June 28, 1988; Graphic Arts Monthly, February 1988.

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Yellow Pages Usage

Almost half of all adults (48.8%) 18 years and over have not looked at the Yellow Pages in the past month.

Here is the percent of adults who have not used the Yellow Pages in the past 12 months at home or at business to purchase any of the following item or services.

Category	% Of Adults Reached By Yellow Pages In Past 12 Months	% Of Adults Not Reached By Yellow Pages In Past 12 Months
Appliances, Small	7.6%	92.4%
Autos, New	4.5	95.5
Auto Filters	4.0	96.0
Bedroom Furniture	2.0	98.0
Boat, Inboard/Outboard	.7	99.3
Car Batteries	2.8	97.4
Car Leasing	.9	99.1
Car Rental	3.2	96.8
Car Telephone	1.0	99.0
Carpeting	3.5	96.5
Chairs, Recliners	1.4	98.6
Gasoline, Branded	1.6	98.4
Hospitals/Nursing		
Homes	4.8	95.2
Hotels/Motels	7.0	93.0
In-home Health		
Care Services	2.1	97.9
Insurance,		
Medical	5.8	94.2
Loans/Real Estate		
Loans	2.2	97.8
Mufflers	2.8	97.2
Pet Supplies	4.1	95.9
Real Estate		
Brokers	2.3	97.7
Television Sets	2.5	97.5
Toy Stores	2.9	97.1
Truck or		
Van Rental	1.5	98.5
Typewriter or		
Word Processor	1.6	98.4
Vacuum Cleaner		
Sales/Service	2.7	97.3
Video Cassettes	3.4	96.6

Source: Simmons, 1988

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The Latest Developments

As a result of the AT&T divestiture on January 1, 1984, the seven regional Bell telephone companies (Baby Bells) started producing their own directories. The new competitive atmosphere has had directory publishers all vying for a larger share of the market. This has led to more "user-friendly" directories with product enhancements. Among these new developments are:

"Talking Yellow Pages"

By inserting a special telephone number in their ads, advertisers can have prospective customers call and hear more about their products or services. The cost can range from \$15 to \$150 a month depending on the size of the market in which the directory is published. Advertisers pay for space--30, 45 to 60 seconds of digitally stored speech on an audiotex computer's memory disk. The advertiser programs a specific message and updates it as often as deemed necessary. An audiotex system is a type of voice response. Touch tone callers can access information by punching a few buttons on their phones.

There are two categories of talking Yellow Pages services:

(1) **Front of the book:** These comprise a core group of free information and entertainment services supplied by the directory publisher to pull in additional revenue. Topics may include news and sports updates, weather, horoscopes, lottery results, trivia games and health tips. For a fee, advertisers can sponsor these services.

(2) **Back of the book:** These are "talking ads" provided by participating advertisers. Companies with talking ads display their four-digit code beneath a talking ad icon in their listings. Callers use this number to get more information on a particular advertiser.

Couponing

Recently, several Yellow Pages publishers have started inserting coupons for local businesses at the back of local directories. But a brand new service called "Special Delivery" was started this year. This service delivers coupons, product samples and other marketing messages, wrapped in polybags, along with the directories. This is the first time free-standing coupons for national distributors have been offered.

(over)

The first two "Baby Bells" involved in this new coupon distribution program are NYNEX and BellSouth. In the future, the move could make phone companies formidable competitors to local and regional newspapers and national co-op mailers such as Donnelley Marketing's Carol Wright.

EDI Yellow Pages

EDI is computer-to-computer communication using highly standardized electronic versions of common business documents. The technology can be used to pay bills, send invoices, monitor inventory and deal with other formerly work-intensive tasks. EDI Yellow Pages enables users to determine who else is equipped with the technology.

EDI Yellow Pages is divided into two sections. The first attempts to provide a complete list of companies that use the technology. The second acts as a regular Yellow Pages, providing a list of EDI-related goods and services, complete with advertisements. To exploit the technology a corporation must deal with another firm that is also equipped to use it. Companies using EDI to do business together are called trading partners, which makes the EDI Yellow Pages something of a giant, high-tech dating service.

Increased Use Of Color

Directories have gone from white pages with black ink to two-color and now four-color. In 1989, almost every major directory producer revamped the front of the book with four-color and coated stock pages. Spot color throughout directories is expected to grow by 10% in the coming year.

For the television salesperson interested in selling against the Yellow Pages, the Consumer Review Systems has published "The Yellow Pages Report: A Comprehensive Guide For Advertisers." This report details why smaller Yellow Pages ads may well draw better than larger ads as well as the fact that the addition of a second color to a large ad often decreases the chance the ad will draw more response.

A copy of this report is available from Consumer Review Systems for \$44, which is a specially reduced price for TVB members only. Write or phone Doug Berdie, Consumer Review Systems, 6025 Eubank Road, Menard, MDN 54364 (313) 473-5236.



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When The Yellow Pages Needs To Reach Out For New Advertisers And New Users-- They Reach Out On Television

The Yellow Pages knows no medium has the saturation coverage of television. When it comes to attempting to expand advertising directory listings or consumer usage, Yellow Pages publishers do it on television.

In 1988, the Yellow Pages invested \$59.7 million in television advertising--a gain of 12% over the previous year.

Top 10 Yellow Pages Advertisers On Television--1988

Company	TV Investments	Company	TV Investments
1) Bell Atlantic	\$17,798,700	5) BellSouth	\$5,234,900
Bell Atlantic	\$1,280,100	South Central Bell	\$1,826,500
Bell of Pennsylvania	\$4,519,000	Southern Bell	\$3,407,800
Chesapeake & Potomac Tele.	\$5,455,900		
New Jersey Bell	\$5,182,000	6) GTE Corp.	\$4,192,000
		GTE	\$4,192,000
2) NYNEX	\$9,537,800		
New England Tele.	\$11,800	7) U.S. West	\$4,158,900
New York Tele.	\$41,100	Pacific NW Bell	\$22,300
NYNEX	\$9,475,100	US West	\$4,135,600
3) Ameritech	\$7,198,900	8) Pacific Telec	\$3,588,900
Ameritech Bell	\$7,132,900	Pacific Bell	\$3,588,900
Illinois Bell	\$600		
Indiana Bell	\$19,900	9) United Telecommunications	\$681,000
Michigan Bell	\$19,900	Carolina Tele.	\$234,800
Ohio Bell	\$20,200	United Telephone	\$346,200
Wisconsin Bell	\$5,100		
		10) Southern New England	
4) Southwestern Bell Corp.	\$6,641,400	Telecommunications	\$464,100
New York	\$719,100	Southern New England	\$464,100
Southwestern Bell	\$5,922,300		

Source: BARR

TMB

How 4 Television Stations Are Converting Yellow Page Dollars On To Television

Television stations throughout the country are finding new sources for local advertising revenues by concentrating their sales efforts on advertisers in their local Yellow Pages directories. Many stations report that it's important to learn as much as you can about the Yellow Pages industry and how it sells before you attempt to convert these advertisers to television.

Here is a report from four stations on their strategies and successes in converting Yellow Pages dollars to their stations.

WLOX-TV, Biloxi, MS reports...

Bobby Edwards, general sales manager, WLOX-TV, Biloxi, MS, reports that as a direct result of his station's efforts to go after local Yellow Pages dollars, station revenue increased \$112,000—of which 80% was "new money." In addition, there was a 70-page drop in listings in the local Yellow Pages directory.

"Station management must be committed to making this effort work," reports Mr. Edwards. "And one management person must be assigned to Yellow Pages conversion full-time to ensure it works. The effort requires tremendous follow-through on the part of the sales staff who must be out there continually making sales calls."

WLOX used the expertise of American Consulting Services, Vancouver, WA (1-800-255-9784), to train its sales staff on Yellow Pages conversion.

The sales staff learned how to suggest to Yellow Pages advertisers that they redirect the way they buy Yellow Pages advertising. The sales staff points out that it doesn't matter what size ad you have in the Yellow Pages because people are looking for a phone number. So, a Yellow Pages advertiser should buy an alphabetical listing, perhaps in bold type, instead of spending a large amount of money each month on a larger ad.

Mr. Edwards also points out that the sales staff mention to a Yellow Pages advertiser that most prospective customers thumb through a particular category from back to front. Yet most of the larger ads in a particular category appear in the front of that category listing. The first listings this customer sees are the small listings in the back of the category. This is an excellent reason for a Yellow Pages advertiser to reduce the size of the ad.

"It's important to know the closing dates for the local Yellow Pages," states Mr. Edwards. "If your sales staff is out there selling three months before the book closes, you have the opportunity to convert a lot of money to television because a Yellow Pages advertiser must commit to a 12-month Yellow Pages schedule."

WVUE, New Orleans, LA reports...

WVUE lets its fingers do the walking. And when they land on an advertiser in the Yellow Pages, the station puts its sales team to work.

Ron Jones, WVUE's general sales manager, feels he's got a more realistic chance of eating into the \$38 million Yellow Pages market in New Orleans than making a dent in the \$230 million in ad revenues that newspapers take in every year.

Mr. Jones hired Greenwood Performance Systems, Tulsa, to help him get some of those Yellow Pages dollars. Greenwood Performance Systems spent a day training WVUE sales people on the fine art of selling television to Yellow Pages advertisers.

"We've generated well over \$100,000 in conversion monies," states Mr. Jones, "but that's not the reason we took on the Yellow Pages. Rather, we wanted to take another step in establishing our sales people as professional consultants. One of the major hospitals in New Orleans was in the process of renewing its Yellow Pages contract. We met with them and as a result they down-sized their Yellow Pages advertising and gave us a good schedule.

"You've got to realize that converting Yellow Pages dollars to television takes time. If you're pitching now, the revenue stream will come in four to six months. We've been pitching against Yellow Pages since mid-July; the book closes in January and is published in March. So don't be discouraged if you don't see immediate results.

"Take a look at what a Yellow Pages advertiser is doing and try to make some sense out of it. If you can show an advertiser the reasons for buying a smaller space in the Yellow Pages, that means there's more of that advertiser's budget available for television. Yellow Pages salespeople get a very small percentage on a simple renewal. But if they can increase the size of an advertiser's ad—or increase the monthly investment by the addition of color—they get a larger commission. We find these advertisers appreciate the fact that we can help them save money. Saving money each month helps them—and that money they put into television helps our station."

**KCPQ, Seattle-Tacoma, WA
reports...**

Dennis McCormick, local sales manager, KCPQ, Seattle-Tacoma, reports his station recently converted over \$100,000 of Yellow Pages advertising on to the station. The station used American Consulting Services, Vancouver, WA, which provided two days of live sales training as well as a comprehensive videotape--all designed to capture advertising dollars from the Yellow Pages.

"It's important to let Yellow Page advertisers know that they simply can't increase awareness for their companies or services--no matter how large the size of their Yellow Page ad--because any Yellow Pages ad is not as pervasive or intrusive as is television advertising. If you communicate the value of television--how its enormous reach and impact can establish name awareness --then you can propose a revised Yellow Pages schedule (based on smaller Yellow Pages' ads) and supplement it with television," states Mr. McCormick.

"Before you pursue a particular advertiser category, go through the Yellow Page directory and make notes of those advertisers by size of ad, number of locations in the directory, by use of color, and anything else the advertiser is paying extra dollars for. With rate information published by the Yellow Pages Publishers Association in the Publisher's Directory Rate Book, we can estimate the amount of money an advertiser has committed annually to the Yellow Pages.

"With the extra money these advertisers save from downsizing their ad, we prepare a television schedule that will give the advertiser that critically important name recognition--as well as reach--before a customer starts looking through page after page of category listings in a directory.

"We hire a commercial artist to design reduced 'dollar bill' sized ads for large-unit Yellow Page advertisers. Yellow Page salesmen simply don't have the expertise to design an effective ad."

**WMBB-TV, Panama City, FL
reports...**

"The Yellow Pages is not an advertising vehicle," reports Ray Hundley, account executive, WMBB-TV, Panama City. "No matter how much space an advertiser uses, it still comes down to an alphabetical listing in a directory. We tell Yellow Pages advertisers that it's fine to have a listing, but you've got to build name awareness for a product or service so that when a consumer is looking through page after page in a particular category that consumer will remember your name. And, of course, we tell them the only way they can build that name awareness is with a media mix with television the dominant medium because of its sight, sound, motion and emotion.

"Very often we find a Yellow Pages advertiser doesn't realize the annual cost of that advertising because the space costs come on the phone bill and these charges are submitted every month for the duration of the book and every subsequent book that is printed. Yellow Pages contracts are automatically renewed at the end of the year unless the advertisers ask to cancel or change them. So it's important to remind Yellow Pages advertisers how much of their money is going into the directory each year. This often comes as quite an unpleasant surprise.

"We used American Consulting Services to detail for us how the Yellow Pages sell and what is the best way to get advertisers to convert those monies to television.

"We ask a potential client: 'If you looked in the Yellow Pages and saw a large ad from a firm you didn't know and a smaller ad from a firm you did recognize, which one would you use?'

"Then we tell the client that the key is to use the dollars saved by reducing the ad in the Yellow Pages...and putting that money into an effective name awareness campaign...on television."



BRUSKIN/GOLDRING RESEARCH



1990 MEDIA COMPARISONS

Television Bureau of Advertising, Inc.
850 Third Avenue, New York, NY 10022-6222
Telephone: (212) 486-1111

**TVB/BRUSKIN/GOLDRING RESEARCH
1990 MEDIA COMPARISONS STUDY**

The Television Bureau of Advertising (TVB) and Bruskin/Goldring Research, a highly respected market research firm, have worked together on various projects since the late 1950s. One particular project, first commissioned by TVB in 1970, measured the media preferences of American adults with four major media.

This benchmark study inquired of adults if they had spent time with television, newspapers, radio and magazines over the course of a given day, and if so, how much time.

Updated on a periodic basis for the last 20 years, the TVB/Bruskin/Goldring Research Media Comparisons Study, along with the NAB-NTA/Roper Survey, continues to show the tremendous advantage television enjoys both in the number of adults reached each day and the amount of time adults spend with the medium each day.

This survey also confirms, once again, that the public's perception of television advertising as the most "authoritative," "exciting," and "influential" advertising medium.

It is clear from this study that no other medium can match the impact of television.

BRUSKIN/GOLDRING RESEARCH

Bruskin/Goldring Research is a leader in the field of market research. It has conducted research studies for hundreds of America's largest corporations for over 25 years. Included in its client roster are AT&T, American Express, J. Walter Thompson and all three television networks. Of the Fortune 500 companies, 70 of the top 100 used Bruskin in the past year.

Bruskin/Goldring's staff is comprised of professional researchers specializing in both quantitative and qualitative techniques. In addition, the company has a staff of about 300 interviewers working through an internal central telephone operation.

Bruskin/Goldring develops custom-designed studies for clients in national, regional and local areas. These studies are conducted mainly through telephone and personal face-to-face interviews. Bruskin/Goldring Research is located at Metroplex Corporate Center I, 100 Metroplex Drive, Edison, NJ 08817 (908) 572-7300

THE METHODOLOGY

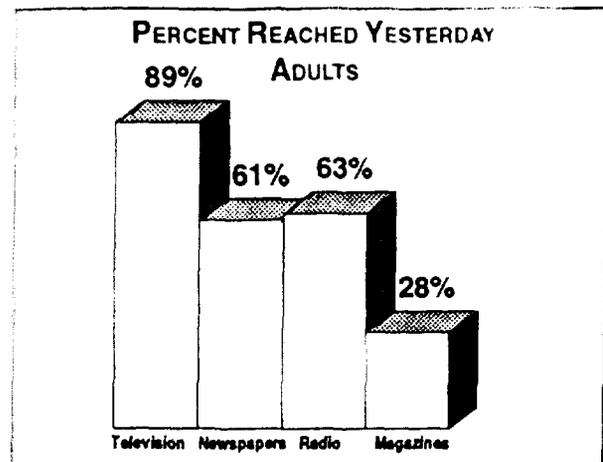
The study was done in two parts

The percentage reached and the time spent data were based on personal, in-the-home interviews with 957 men and 1,050 women (18 years of age and older). Viewers were questioned on the time spent yesterday with various media. Questions were asked about the four media (television, radio, newspapers, magazines) and the four dayparts (6am-12 noon, noon-6pm, 6pm-midnight, after midnight). The media questions were rotated to prevent bias. All interviewing was conducted between February 15, and March 5, 1990.

The image of advertising in the major media section and the section on readership of newspaper inserts, catalogs and general mailers comes from a national telephone interview conducted January 19-21, 1990. A total of 1,003 interviews were completed: 503 women and 500 men.



The Question: *Thinking about yesterday between (6am-noon, noon-6pm, 6pm-midnight, and after midnight) did you (watch or look at any TV, listen to any radio, read any newspaper, or read any magazine) at home or away from home?*



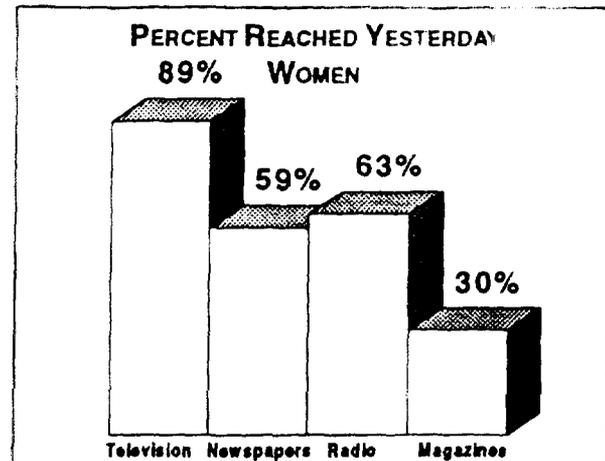
ADULTS: PERCENT REACHED YESTERDAY BY MAJOR MEDIA

	TELEVISION	NEWSPAPERS	RADIO	MAGAZINES
Adults	89	61	63	28
Age				
18-34	89	49	71	25
35-64	89	68	63	29
55+	94	73	52	28
18-49	88	55	69	26
25-54	88	59	67	28
Household Income				
Under \$20,000	92	52	60	22
\$20,000-\$39,999	90	60	66	26
\$40,000+	86	71	69	38
\$50,000+	86	71	72	38
Education				
Less than High School	95	44	50	11
High School Grad	91	58	61	26
Some College	86	66	71	32
College Grad	85	75	69	38
Occupation				
Prof/Tech	85	68	66	37
Mgr/Off/Prop	82	66	74	33
Clerical/Sales	87	61	68	29
Non-white Collar	87	64	67	31

Source: Bruskin/Goldring Research, 1990



The Question: Thinking about yesterday between (6am-noon, noon-6pm, 6pm-midnight, and after midnight) did you (watch or look at any TV, listen to any radio, read any newspaper, or read any magazine) at home or away from home?



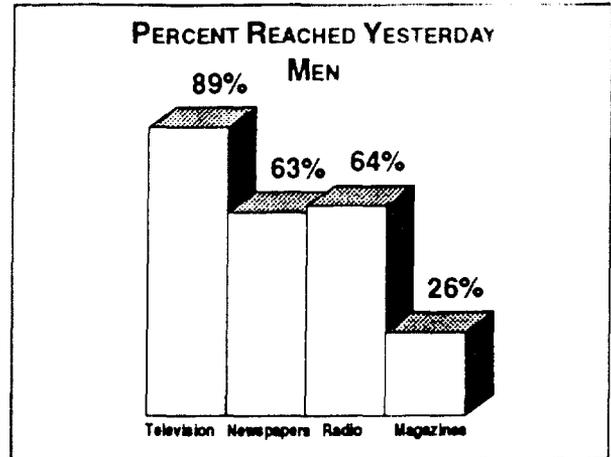
WOMEN: PERCENT REACHED YESTERDAY BY MAJOR MEDIA
Television Newspapers Radio Magazines

Women	89	59	63	30
Age				
18-34	87	47	70	28
35-64	89	67	61	30
55+	95	70	55	29
18-49	87	53	66	29
25-54	87	58	64	31
Household Income				
Under \$20,000	94	53	61	24
\$20,000-\$39,999	88	58	65	29
\$40,000+	84	66	69	35
\$50,000+	81	63	70	38
Education				
Less than High School	94	42	47	7
High School Grad	92	58	58	28
Some College	86	60	74	35
College Grad	84	69	67	35
Occupation				
Working Women	86	58	67	30
Prof/Tech	80	62	63	32
Mgr/Off/Prop	78	63	73	33
Clerical/Sales	88	57	67	32
Non-white Collar	87	61	67	32
Housewives	93	57	60	29

Source: Bruskin/Goldring Research, 1990



The Question: *Thinking about yesterday between (6am-noon, noon-6pm, 6pm-midnight, and after midnight) did you (watch or look at any TV, listen to any radio, read any newspaper, or read any magazine) at home or away from home?*



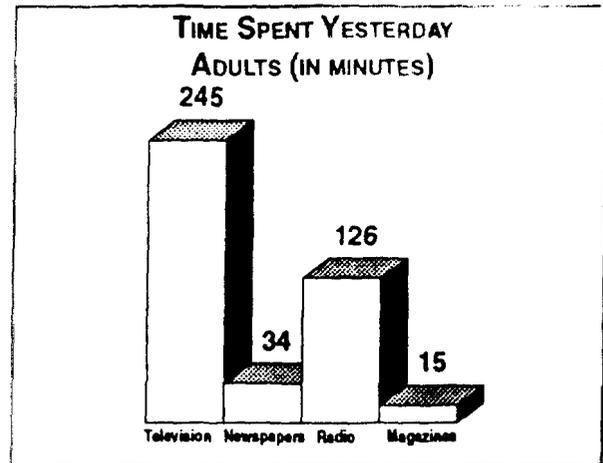
MEN: PERCENT REACHED YESTERDAY BY MAJOR MEDIA

	Television	Newspapers	Radio	Magazines
Men	89	63	64	26
Age				
18-34	90	50	71	21
35-64	88	69	66	27
55+	92	77	48	28
18-49	88	57	72	24
25-54	88	60	70	25
Household Income				
Under \$20,000	90	51	60	19
\$20,000-\$39,999	91	63	67	23
\$40,000+	89	77	69	40
\$50,000+	90	79	74	38
Education				
Less than High School	96	45	52	14
High School Grad	90	57	63	22
Some College	86	74	68	27
College Grad	86	81	70	42
Occupation				
Prof/Tech	91	76	68	42
Mgr/Off/Prop	86	69	75	33
Clerical/Sales	85	72	70	23
Non-white Collar	87	68	66	30

Source: Bruskin/Goldring Research, 1990



The Question: *What were the actual times between (6am-noon, noon-6pm, 6pm-midnight, and after midnight) that you (watched TV, listened to the radio, read a newspaper, or read a magazine)?*



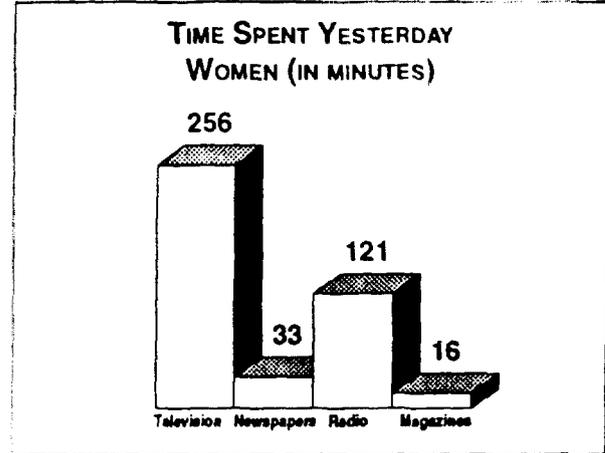
ADULTS: TIME SPENT YESTERDAY IN MINUTES WITH MAJOR MEDIA
Television Newspapers Radio Magazines

Adults	245	34	126	15
Age				
18-34	239	23	142	13
35-64	236	37	124	16
55+	289	48	90	16
18-49	227	27	138	14
25-54	225	29	134	15
Household Income				
Under \$20,000	298	30	137	11
\$20,000-\$39,999	240	33	127	14
\$40,000+	198	39	125	20
\$50,000+	191	41	135	21
Education				
Less than High School	272	22	93	4
High School Grad	273	31	132	14
Some College	208	34	123	16
College Grad	184	46	115	22
Occupation				
Prof/Tech	186	35	105	18
Mgr/Off/Prop	156	33	129	15
Clerical/Sales	221	30	125	15
Non-white Collar	211	35	124	17
Housewives				

Source: Bruskin/Goldring Research, 1990



The Question: *What were the actual times between (6am-noon, noon-6pm, 6pm-midnight, and after midnight) that you (watched TV, listened to the radio, read a newspaper, or read a magazine)?*



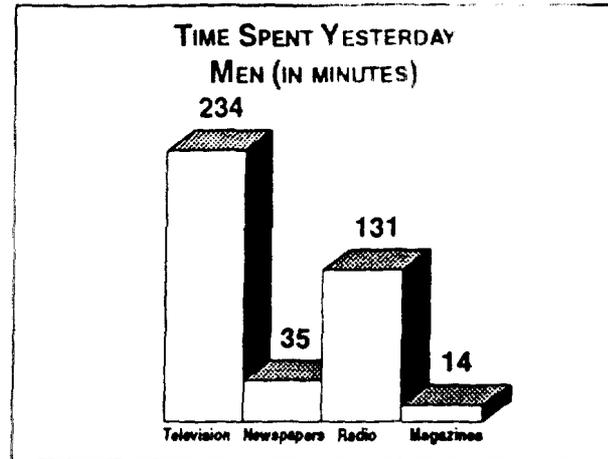
WOMEN: TIME SPENT YESTERDAY IN MINUTES WITH MAJOR MEDIA
Television Newspapers Radio Magazines

Women	256	33	121	16
Age				
18-34	242	24	133	15
35-64	247	35	118	16
55+	312	42	97	15
18-49	231	26	127	15
25-54	232	29	127	17
Household Income				
Under \$20,000	323	31	135	12
\$20,000-\$39,999	242	29	126	14
\$40,000+	191	34	122	19
\$50,000+	180	35	129	22
Education				
Less than High School	322	21	83	3
High School Grad	287	31	122	15
Some College	212	32	126	19
College Grad	188	44	118	20
Occupation				
Working Women	206	28	131	15
Prof/Tech	180	31	99	15
Mgr/Off/Prop	141	28	136	16
Clerical/Sales	225	28	129	18
Non-white Collar	215	34	127	17
Housewives	312	31	106	15

Source: Bruskin/Goldring Research, 1990



The Question: *What were the actual times between (6am-noon, noon-6pm, 6pm-midnight, and after midnight) that you (watched TV, listened to the radio, read a newspaper or read a magazine)?*



MEN: TIME SPENT YESTERDAY IN MINUTES WITH MAJOR MEDIA

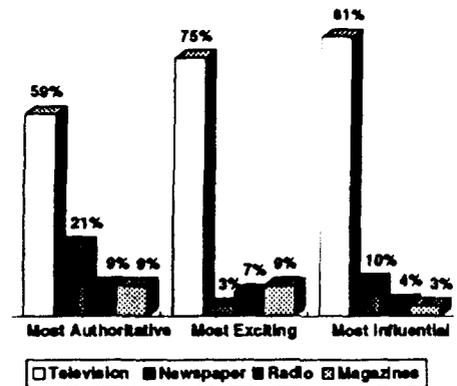
	Television	Newspapers	Radio	Magazines
Men	234	35	131	14
Age				
18-34	236	22	152	11
35-64	223	38	130	15
55+	262	55	82	17
18-49	223	27	150	12
25-54	218	29	143	12
Household Income				
Under \$20,000	266	28	139	10
\$20,000-\$39,999	239	36	127	15
\$40,000+	205	44	128	21
\$50,000+	202	45	141	19
Education				
Less than High School	238	23	101	6
High School Grad	258	32	142	13
Some College	203	38	120	13
College Grad	181	49	112	23
Occupation				
Prof/Tech	194	39	113	22
Mgr/Off/Prop	169	38	123	14
Clerical/Sales	211	35	117	9
Non-white Collar	206	37	122	16

Source: Bruskin/Goldring Research, 1990



The Question: Which of these kinds of advertising (1) is the most authoritative, (2) is the most exciting, (3) has the most influence on people?

**IMAGE OF ADVERTISING
WOMEN**



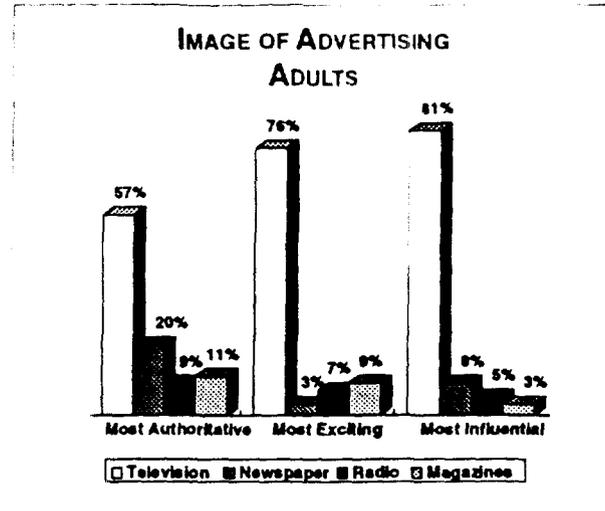
WOMEN: IMAGE OF ADVERTISING IN MAJOR MEDIA (%)

	MOST AUTHORITATIVE				MOST EXCITING				MOST INFLUENTIAL			
	TV	Nwsp	Radio	Mag	TV	Nwsp	Radio	Mag	TV	Nwsp	Radio	Mag
Women	59	21	9	9	75	3	7	9	81	10	4	3
Age												
18-34	56	20	16	7	71	2	14	12	77	12	8	3
35-64	63	23	4	8	78	4	3	10	87	7	2	3
55+	60	21	5	10	76	4	1	5	79	13	-	4
18-49	58	20	11	9	75	1	10	12	81	9	6	3
25-54	58	23	7	10	75	4	8	11	83	9	4	3
Household Income												
Under \$20,000	61	19	10	8	77	6	5	4	79	11	3	5
\$20,000-\$39,999	60	20	8	8	74	2	9	12	86	6	5	2
\$40,000+	52	22	9	14	73	1	7	14	81	10	4	4
\$50,000+	52	19	6	18	71	1	4	18	82	13	2	3
Education												
Less than High School	74	11	8	5	68	8	6	6	67	15	4	8
High School Grad	60	19	11	9	82	4	5	6	82	13	2	3
Some College	56	24	11	8	74	3	11	8	86	6	6	-
College Grad	48	25	3	16	68	-	6	18	81	9	5	4
Occupation												
Working Women	58	20	10	8	75	3	9	10	83	9	5	2
Prof/Tech	51	23	4	15	68	2	6	18	85	10	3	2
Mgr/Off/Prop	54	20	4	18	81	-	8	9	82	16	-	-
Clerical/Sales	60	21	15	2	76	2	10	11	78	7	11	-
Non-white Collar	68	15	11	6	82	5	7	4	88	7	2	-
Housewives	61	19	10	9	82	3	9	7	82	7	4	4

Source: Bruskin/Goldring Research, 1990



The Question: Which of these kinds of advertising (1) is the most authoritative, (2) is the most exciting, (3) has the most influence on people?



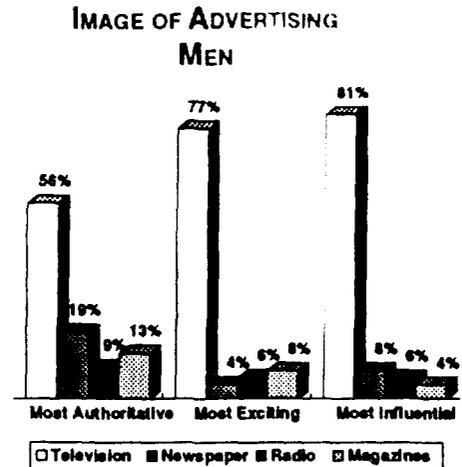
ADULTS: IMAGE OF ADVERTISING IN MAJOR MEDIA (%)

	MOST AUTHORITATIVE				MOST EXCITING				MOST INFLUENTIAL			
	TV	Nwsp	Radio	Mag	TV	Nwsp	Radio	Mag	TV	Nwsp	Radio	Mag
Adults	57	20	9	11	76	3	7	9	81	9	5	3
Age												
18-34	58	19	13	7	74	2	13	10	82	9	6	2
35-64	59	20	6	12	79	4	3	9	82	7	4	4
55+	55	19	5	14	75	4	1	6	78	11	2	5
18-49	57	20	11	10	77	2	9	10	82	9	6	3
25-54	57	22	8	10	77	4	7	10	83	8	4	3
Household Income												
Under \$20,000	63	17	10	9	76	6	6	5	80	10	3	4
\$20,000-\$39,999	61	18	8	10	78	2	8	10	82	8	6	2
\$40,000+	50	24	9	14	77	3	6	11	81	9	4	5
\$50,000+	50	21	7	18	77	3	4	11	80	10	3	6
Education												
Less than High School	67	14	8	6	70	9	4	6	72	11	5	6
High School Grad	63	16	10	10	82	3	6	7	80	13	3	3
Some College	54	25	12	8	75	4	9	7	85	6	6	2
College Grad	46	23	5	19	73	1	5	14	83	6	5	4
Occupation												
Prof/Tech	51	24	4	14	77	2	5	12	90	7	2	2
Mgr/Off/Prop	51	25	9	11	78	4	7	9	85	9	3	-
Clerical/Sales	61	19	13	5	76	1	10	10	77	9	9	4
Non-white Collar	61	14	12	11	79	5	7	6	81	8	7	2

Source: Bruskin/Goldring Research, 1990



The Question: Which of these kinds of advertising (1) is the most authoritative, (2) is the most exciting, (3) has the most influence on people?



MEN: IMAGE OF ADVERTISING IN MAJOR MEDIA (%)

	MOST AUTHORITATIVE				MOST EXCITING				MOST INFLUENTIAL			
	TV	Nwsp	Radio	Mag	TV	Nwsp	Radio	Mag	TV	Nwsp	Radio	Mag
Men	56	19	9	13	77	4	6	8	81	8	6	4
Age												
18-34	60	19	11	7	77	3	11	8	86	7	5	2
35-64	54	18	8	16	80	4	4	9	76	8	8	6
55+	48	17	4	19	73	5	1	8	77	9	5	6
18-49	57	21	11	10	79	3	9	7	82	8	6	3
25-54	56	21	9	11	79	3	6	8	83	8	5	3
Household Income												
Under \$20,000	66	13	8	10	72	7	8	7	83	9	4	1
\$20,000-\$39,999	61	16	8	12	81	2	7	7	78	10	8	3
\$40,000+	49	25	9	14	80	4	5	9	81	8	4	6
\$50,000+	48	23	7	17	82	4	4	6	79	8	3	8
Education												
Less than High School	59	17	9	8	73	10	3	7	78	6	7	4
High School Grad	67	11	8	12	82	2	7	8	77	13	6	3
Some College	51	26	12	8	75	5	7	5	85	6	6	4
College Grad	45	23	6	20	77	2	5	11	85	3	5	4
Occupation												
Prof/Tech	51	26	4	14	86	1	4	6	94	4	-	1
Mgr/Off/Prop	50	28	12	7	77	6	7	8	87	5	5	-
Clerical/Sales	63	15	10	10	75	-	8	7	77	13	5	5
Non-white Collar	57	14	13	12	78	5	7	7	78	8	10	3

Source: Bruskin/Goldring Research, 1990



TRENDS

In Media

-Audience

-Cost

-CPMs

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A TVB Research Report

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TRENDS IN MEDIA

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NETWORK TELEVISION COST AND CPM TRENDS

DAYTIME (M-F)

-----AVERAGE PROGRAM-----

	HOUSEHOLDS VIEWING <u>AVG. MIN.</u>	COST PER <u>30 SEC.</u>	COST PER <u>1000 HOMES</u>
1965	4,130,000	\$2,400	\$0.58
1966	4,080,000	3,000	0.74
1967	4,280,000	3,500	0.82
1968	4,750,000	3,800	0.80
1969	4,820,000	3,700	0.77
1970	4,880,000	4,000	0.82
1971	5,040,000	3,600	0.71
1972	5,220,000	3,700	0.71
1973	5,260,000	4,300	0.82
1974	5,180,000	4,500	0.87
1975	5,550,000	5,200	0.94
1976	5,180,000	5,800	1.12
1977	5,390,000	7,500	1.38
1978	5,400,000	7,900	1.45
1979	5,650,000	9,000	1.58
1980	5,530,000	10,000	1.81
1981	5,390,000	10,000	1.86
1982	5,330,000	10,500	1.97
1983	5,200,000	11,000	2.11
1984	5,600,000	12,500	2.22
1985	5,460,000	14,700	2.69
1986	5,430,000	14,000	2.57
1987	5,100,000	12,400	2.43
1988	5,230,000	11,800	2.26
1989	4,930,000	10,100	2.04
1990	4,340,000	10,700	2.46
1991	4,350,000	10,400	2.39
1992	4,210,000	10,400	2.45
1993	4,420,000	11,100	2.50
1994	4,420,000	13,800	3.12

SOURCE: A.C. NIELSEN
FEBRUARY EACH YEAR

NETWORK TELEVISION COST AND CPM TRENDS

NIGHTTIME (M-S)

-----AVERAGE PROGRAM*-----

	HOUSEHOLDS VIEWING <u>AVG. MIN.</u>	COST PER <u>30 SEC.</u>	COST PER <u>1000 HOMES</u>
1965	9,968,000	\$19,700	\$1.98
1966	9,873,000	19,400	1.96
1967	10,007,000	20,400	2.04
1968	11,260,000	22,200	1.97
1969	11,040,000	22,800	2.07
1970	11,430,000	24,000	2.10
1971	12,000,000	21,700	1.81
1972	12,790,000	25,100	1.96
1973	12,600,000	28,900	2.29
1974	13,380,000	30,400	2.27
1975	13,500,000	32,200	2.39
1976	13,720,000	33,000	2.41
1977	14,380,000	42,300	2.94
1978	14,620,000	45,700	3.12
1979	14,910,000	58,100	3.89
1980	15,240,000	57,900	3.79
1981	14,720,000	60,700	4.12
1982	14,140,000	69,900	4.94
1983	15,150,000	81,300	5.36
1984	14,530,000	107,500	7.39
1985	14,510,000	94,700	6.52
1986	14,460,000	98,500	6.81
1987	14,290,000	100,100	7.00
1988	13,250,000	109,000	8.22
1989	13,060,000	109,400	8.37
1990	12,540,000	122,200	9.74
1991	11,810,000	106,400	9.00
1992	12,020,000	93,700	7.79
1993	11,070,000	92,700	8.37
1994	12,710,000	97,200	7.64

* Regular and Specials

SOURCE: A. C. NIELSEN
FEBRUARY EACH YEAR