

PROPOSED

RIDERSHIP RETENTION AND ACQUISITION

ADVERTISING PROGRAM

SUBMITTED BY:

A. Fortuno  
Director of Marketing  
and Communications  
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1.0 RECOMMENDATION

It is recommended that the District approve the proposed budget outlined below for the purpose of planning and executing a Ridership Retention and Acquisition Advertising Program utilizing the television medium.

1.1 PROPOSED BUDGET

<u>FY 1985</u>	<u>Estimated Cost</u>	<u>Percent of Total</u>
Media	\$ 193,300	18.0
Production	<u>214,125</u>	<u>20.0</u>
FY '85 Total	\$ 407,425	38.0
<u>FY 1986</u>		
Media	\$ <u>665,143</u>	<u>62.0</u>
FY '85 & FY '86 Total	<u>\$1,072,568</u>	<u>100.0</u>
<u>Summary by Type</u>		
Media	\$ 858,443	80.0
Production	<u>214,125</u>	<u>20.0</u>
Total	<u>\$1,072,568</u>	<u>100.0</u>

1.2 MEDIA AND PRODUCTION BUDGET SUMMARY FY '85 and '86

<u>MEDIA</u>	<u>ESTIMATED COST</u>	<u>PERCENT OF TOTAL</u>
English Spot Television	\$ 706,303	65.8
Hispanic Spot Television	<u>152,140</u>	<u>14.2</u>
	\$ 858,443	80.0
<u>PRODUCTION</u>	\$ <u>214,125</u>	<u>20.0</u>
<u>TOTAL</u>	<u>\$1,072,568</u>	<u>100.0</u>

1.3 It is also recommended that the following proposed schedule be followed:

Week of March 14, 1985: Board Approval  
Week of March 15, 1985: Commence Production  
Week of May 6, 1985: Complete Production  
Week of May 13, 1985: Start Commercials

1.4 Television is recommended as the optimum medium to achieve the desired objectives of retaining a significant portion of discretionary riders, almost 80 percent of present boardings, and of acquiring new riders as a result of prospective fare increases and service reductions.

As addressed in Sections 3 through 5 of this proposal, detailed consideration has been given to all primary media serving the Los Angeles market in determining the most efficient and effective medium for the proposed program.

The following sections will show that:

- o Television covers the L.A. County market more completely than any other medium.
- o Commercials can be developed to dramatize the benefits of using the RTD and the disadvantages of automobile commuting.
- o The mass characteristics of the audience for television provides optimum coverage of the program's primary target audience.
- o Adults also spend more time with television than any other medium, as do RTD users.
- o Television is more efficient on a cost per thousand basis in reaching the target market.

## 2.0 SUMMARY OF POINTS FOR SELECTION OF TELEVISION

### 2.1 EFFECTIVENESS:

Television is the most effective medium available to the District for mounting a Ridership Retention and Acquisition Program among various demographic targets. The combination of sight, sound and motion provides an opportunity to dramatize public transportation in ways not possible in newspapers and on radio.

2.2 EFFICIENCY: Television is affordable and efficient. It offers the greatest possible penetration of communities within Los Angeles County. It is more efficient on the basis of cost-per-thousand in the demographic categories defined. In all categories, TV is more economical than newspapers against specific target groups.

2.3 AFFORDABILITY: Television need not be purchased on a 52-week a year basis, or even 26 or 13 weeks. It can be bought in flights of from one to four weeks similar to a radio pattern, or any other length of time. Specifically designated flights over 10 months from May, 1985, through April, 1986, has been determined to constitute an effective program. The proposed plan is included in Section 7.0 of this proposal.

### 3.0 BACKGROUND AND OBJECTIVES

The purpose of this proposal is to recommend a Ridership Retention and Acquisition Advertising Program and to support the use of television as the exclusive medium for this activity. The following analysis will consider the strengths and weaknesses of each medium as they relate to the needs of the proposed program. A glossary of unusual terms is provided at the conclusion for purposes of clarification.

This proposal does not include recommendations or budget for ongoing marketing activities in the areas of Service Changes, Operator of the Month, Shop by Bus and other activities. For FY '85, those plans have already been budgeted and scheduled. Proposed programs for FY '86 will be presented in the Department's Budget Proposal.

#### 3.1 THE OBJECTIVES

The primary objective of the proposed program is to minimize the ridership erosion that in the past has proven inevitable with fare increases and service reductions and to acquire new riders to help maintain reasonable levels of patronage and fare box revenues. Retention of all current riders must be considered beyond the scope of any advertising program. On the other hand, advertising can be instrumental in communicating a message to cause passengers who are considering defection to

reconsider and maintain their riding patterns despite an increase in cost, provided the ad program is executed at least six weeks prior to July 1, 1985.

The combination of fare increases and service cuts will have a serious effect in reducing ridership as projections by Planning show. It is therefore considered imperative that aggressive marketing action be taken to reduce as much of the loss as possible. The fare increases will be a major adjustment for most riders. Discretionary riders, those with transportation available, will be motivated to use their cars when faced with sharply higher fare levels. A major television ad program that begins before the fare increase goes into effect, and which is sustained through most of the next fiscal year, will blunt the initial loss of passengers while helping to rebuild ridership over a period of time. A discussion of strategy and commercial content is included in Section 6.0.

### 3.2 THE TARGET

The target market designated for the program are present patrons who ride five or more times a week and pay regular or express fares, and prospective riders for RTD service. A major part of the program will focus on the more than 400,000 discretionary riders who use the bus each weekday and the additional hundreds of thousands who ride the bus occasionally. Their profiles range from low socio-economic characteristics to upscale riders, and include the wide-ranging demography of the working woman, who now represent more than half of all adult females in Los Angeles. The RTD target audience truly represents a mass marketing situation. It is a highly broad market that defines itself more precisely by its transportation habits rather than demographic averages. For example, the current RTD Rider Profile indicates that 23% of the riders have household incomes under \$9,999, while 18% have household incomes of \$40,000 and over. A fairly even distribution of annual household income falls within these extremes. Age is also wide-ranging, with the preponderance of riders in the 18+ category. While rider demographics can be more precisely defined, narrowing the profile in this situation does not provide a base for making efficient media strategy decisions.

### 3.3 THE MARKET

The Los Angeles geographical market can be defined in a myriad of ways, but for the RTD the area of primary importance is Los Angeles County. However, from a media standpoint, it is near impossible to limit the market within the county boundaries.

The optimum base area for comparative purposes is the broadcast coverage area, which is commonly called the "Designated Market Area", or DMA (See Exhibit I).

This area consists of all or part of seven counties. The physical size of the area, however, can be misleading if one is only looking at a map. Exhibits II and III show the actual household distribution within the television area showing the fact that Los Angeles County accounts for 78.4 percent of the L.A./Orange County Metro area, and 63 percent of the households in the entire seven county DMA.

Exhibits III and IV present the figures for the estimated household distribution within the eight sub-regions of Los Angeles County, including a map of the entire Los Angeles marketing area.

Additionally, a breakdown of the adult population by age and sex is presented in Exhibit V. These figures are for the DMA, but data for Los Angeles County are estimated to be approximately 73 percent of those shown.

## 4.0 MASS MEDIA IN LOS ANGELES

The following section will discuss the availability of mass media in Los Angeles, their coverage potential, the selectivity inherent in each medium and their efficiencies against specific target audiences.

### 4.1 AVAILABILITY

The Los Angeles market is probably the most complex in the U.S. in terms of total media availability. Options range from the primary media (radio, television and daily newspapers) to numerous large and small regional magazines, regional editions of national magazines, approximately 300+ weekly newspapers, transit advertising,



bus benches and other outdoor companies. Media considerations for a Ridership Retention and Acquisition Program have been limited to the three primary media: radio, television and daily newspapers.

As shown in Exhibit VI, availability of primary media is excessive. There are 90 radio stations, 12 commercial television stations, and 22 major English daily newspapers in Los Angeles County alone. In addition, there are almost 50 ethnic daily and weekly newspapers, which include Hispanic, Black and Oriental publications.

The advertising industry estimates that the average person in the U.S. is exposed to more than 2,000 commercial messages each day, and that in major urban areas such as Los Angeles the figure is substantially higher.

#### 4.2 COVERAGE

All primary media allow the opportunity to provide adequate coverage of Los Angeles County, but vary in degree of coverage and cost to achieve coverage. The maximum reach potential of radio is in the 85 - 90 percent range, but the cost to achieve that is prohibitive. It requires the use of 12 - 14 major stations to achieve coverage of between 75 - 80 percent.

The maximum reach potential of television is the highest among primary media at 96 percent. This is due to the mass nature of the medium and the relatively few stations of any significance. The fewer the options the less opportunity for fractionalizing the audience, therefore providing higher concentrations of audience.

In the area of daily newspapers, while there are not an overwhelming number of papers, no single paper, including the Los Angeles Times, provides more than 30 percent coverage of Los Angeles County. The aggregate total of all 10 major daily newspapers in Los Angeles County is 57 percent coverage of the households (See Exhibit XII).

Another dimension, indicating the degree of market coverage by the various media is shown in Section II of Exhibit VI. Of the sum total of time that adults spend with media, 53% is spent with television, 33% is spent on radio and 9% is spent on newspapers.

#### 4.3 SELECTIVITY

All of the primary media offer some form of selectivity in reaching a market or specific target audience. The limits and flexibilities of each medium individually are addressed below. However, as indicated, certain aspects of selectivity are of a nature that they apply to two or more media jointly.

4.31 RADIO: This medium offers a wide variety of options for selectivity. It can be bought seasonally for products or services lending themselves to seasonal promotion, or a schedule can be constructed to concentrate and run exclusively in selected day-parts, such as in reaching housewives, if that were the target audience.

The length of the message varies, but the most used is 60 seconds. The major reasons for this is that stations charge premiums for shorter spots. A 30 second spot usually costs 80% of the rate charged for 60 seconds, thus discouraging their use.

Some stations with lower-power output provide the ability to cover a limited geographic area, or allow for enhancing coverage in key areas where major stations are already being used.

One of the most useful methods of employing radio to selectively reach a target audience is to evaluate the demographic distribution of a station's audience through its format. Radio research shows how adults are distributed through the spectrum of formats, by age. Many other demographic profiles can be constructed in a similar manner by format or individual station, such as sex and income. These profiles can be combined to conform to a target audience definition.

In addition, ethnic stations allow for appeals to the special needs of their community. This is often a geographic area as well as an ethnic audience.

- 4.32 TELEVISION: Like radio, television can be bought seasonally for products such as suntan lotion in summer and toys in fall, and by specific dayparts such as daytime or late fringe, if desired (See Exhibit VII).

There is also flexibility in commercial length for television. The most common lengths are :30 and :10 seconds, with :30's being the most predominant by a substantial margin because there is no premium in the rate. On the other hand, :10 seconds are usually bought at 60% of the cost of a :30, but they are in limited supply.

Television is not geographically flexible in the Los Angeles DMA. However, Spanish language television does allow an advertiser to reach that ethnic audience exclusively, if he chooses to do so.

Demographics play a key role in buying television, but in a different manner than with radio. As previously mentioned, radio tends to demographically segment itself by format. This is due to station loyalty. Television, on the other hand, elicits program loyalty. Therefore, programs are analyzed by their demographic profiles. Still, some generalities can be drawn from the demographic makeup of key dayparts as shown in Exhibits VIII and IX.

- 4.33 NEWSPAPER: This medium has many of the same flexibilities as the other media and some exclusive features as well. Seasonality is universal to all of the primary media, but aside from selecting morning or evening editions, where available, there is no daypart selectivity.

On the other hand, the message size and length are extremely variable, from only a few column inches to double-truck spreads, if desired.

The medium is also a static vehicle which is an advantage in communicating lengthy and more detailed messages.

Major daily newspapers in L.A. County cover wide geographic areas providing paid circulation to broad clusters of communities. Community newspapers (daily and/or weekly) are both paid and free to households in individual communities. This allows for targeted geographic selectivity within concentrated localities, and can be used to support a promotion running in the more widely distributed major daily papers.

An additional flexibility of newspapers is their ability to place advertising within special interest sections of the paper, i.e., sports, food, etc., and while broadcast schedules can be concentrated within several days or weeks, newspapers provide the option of selecting a specific day of the week, should this be of importance to an advertiser.

Newspapers have demographic profiles which show them as generally an older, somewhat upscale group of people, but they do not have the demographic flexibility of broadcast except as it relates to the special interest sections, i.e., sports/men, food/women. Exhibit X presents an age distribution for newspapers generally.

#### 4.4 EFFICIENCY

This is a measure of comparability within, and between, media. It is the cost to reach that portion, or segment, of an audience defined as an advertiser's target.

Section III of Exhibit VI presents average cost-per-gross-rating-point figures for the primary media along with average ratings for each medium. These are averages and represent only general comparisons.

Exhibit XI refines the efficiency data somewhat by introducing demographics and compares the primary media by cost-per-thousand target audience reached. The first point one notices when reviewing these figures is the variances that develop as the demographic profile becomes more selective. In every major circumstance the relative efficiency of television increases as target audience definitions are narrowed.

A specific analysis of newspaper coverage of the Los Angeles County area, combined with unit costs and both efficiency measurements is contained in Exhibit XII.

## 5.0 TELEVISION

The television medium can add a dimension to RTD advertising that has been seldom employed; the aspect of motion.

Radio has provided sound to RTD advertising campaigns, and newspapers have utilized the dimension of sight. Television, however, is the only medium to offer the total spectrum of sight, sound and motion within a single environment.

Television is described as an intrusive medium. Print, on the other hand, is a selective or passive medium. The reason is that a person's exposure to print is often dual in nature. They may be specifically looking into a publication, seeking its advertising, as with supermarket ads, or they may be simply reading for personal satisfaction, in which case they may or may not be exposed to a specific ad. Broadcast is intrusive because the audience is relatively attentive to its chosen programs, which are interrupted by advertising messages.

There are those who believe this creates an alienation among the audience. However, studies by the American Association of Advertising Agencies have shown that the vast majority of people do not resent informative, rational advertising. Advertisers who respect the intelligence of viewers are generally thought of positively, particularly when the commercials are creative and interesting.

Television has the ability to dramatize or glamorize a product or service. It is an excellent medium for enhancing the image of an advertiser. Note the creative approaches some advertisers use with multi-media campaigns. Air travel is an excellent example. The airlines use television to glamorize the experience of flying and the romance of their destinations. But they use newspapers to present their flight schedules and fares. The automotive industry employs television to glamorize the car's style, performance and luxury, while their newspaper ads stress prices, dealer services and warranties.

There are those who say that there is a great deal of "waste" in television if you are trying to cover a limited area. This may be true in some markets, but it is a myth here, when the desire is to cover Los Angeles County. As shown in Exhibit II, TV reaches 97% of L.A. County households. The L.A. Times, as previously discussed and as shown in Exhibit XII, covers only 30% of L.A. County households. The 10 major Los Angeles dailies combined reach only 57% of these households, which gives TV a 40% advantage in coverage when compared to aggregate newspaper use.

Due to the mass characteristics of the television audience, heavy viewers tend to be very close to the median in age, income and education demographics. Interestingly, 64% of RTD users watch television more than two hours a day, compared to 34% for FM radio, 22% for AM radio, and 9% for newspapers and magazines.\*

Below is a demographic analysis of RTD users.\* The range and distribution of income, age and sex closely parallels that of the total TV audience. Age categories are not perfectly aligned, but a general comparison can be easily made. The compatibility of TV with RTD ridership is evident.

RTD TRANSIT USERS vs. TELEVISION AUDIENCE

SEX	AGE		AGE		HOUSEHOLD INCOME				
	RTD USERS	TV AUD.	RTD USERS	TV AUDIENCE		RTD USERS	TV AUD.		
Male	50%	48%	Under 29 yrs.	38%	18-34 yrs.	41%	Under \$15,000	37%	40%
Female	50%	52%	30-49 yrs.	25%	35-49 yrs.	21%	\$15,000-\$24,999	27%	24%
	100%	100%	50+ Yrs.	37%	50+ yrs.	38%	\$25,000-\$39,999	19%	24%
				100%		100%	\$40,000+	17%	12%
								100%	100%

\*1981 RTD Service Awareness Study.

A meaningful comparison of television's delivery versus other primary media is shown in Exhibit XIII. An overview of that exhibit indicates that an expenditure of \$259,592 in newspapers will provide four insertions of a full page ad in ten major dailies. This develops a reach of 65 percent, with a frequency of 4.2 times. That is contrasted with an expenditure of \$216,670 for four weeks of television at 150 GRP/Week, developing a reach of 80 percent and a frequency of 7.5 times. The net difference in this comparison is that at 80 percent of the cost for newspapers, television delivers a 23 percent higher reach and a 79 percent higher frequency.

Other data from this exhibit demonstrate that television is primarily a "reach" medium and radio is primarily a "frequency" medium. An expenditure of \$141,630 in television generates a reach/frequency of 75%/5.3 times; an expenditure of \$182,320 in radio develops a reach of 59 percent but a frequency of 10.2 times. Thus television provides a 27 percent greater reach while radio delivers a 92 percent higher frequency.

Another method for assessing and selecting media is to compare the delivery of each medium within similar budget allocations. Exhibit XIV presents these comparisons for three hypothetical budgets. At each of the levels, television develops the greatest reach and good intermediate frequency.

For the foregoing reasons television has been selected and recommended for the Ridership Retention and Acquisition Advertising Program. Clearly, it is the most effective medium for the presentation of RTD messages to the maximum potential target audience in an efficient manner.

## 6.0 TELEVISION STRATEGY

The recommended use of television is in two phases: pre-fare increase and post-fare increase. The first phase precedes the July 1 increase by approximately six to seven weeks. During this period the intention is to remind and reinforce among bus patrons the benefits of bus transportation and the negative aspects of the alternative--the car.

Rather than an abrupt series of messages occurring after the fare increase takes place, this phase of the program will be designed to influence riders during the time they are considering alternative forms of

transportation in anticipation of higher fare. Advertising after fares are increased is too late. Many riders will already have made their decision and the opportunity to influence their decision-making would have been lost.

Phase Two sustains Phase One of program with the objective of reinforcing people's decision to continue taking the bus. They must be reminded constantly of the benefits of public transportation, despite the higher fare. They must be reminded that they are much better off than commuters who drive in traffic congestion each weekday. Phase Two is also directed at those who have defected, who are now in their own cars, a friend's, or perhaps taking the bus only occasionally. Some members of this group can be motivated back to the bus by ongoing advertising. Maintaining contact with former riders is essential to regaining ridership. Their previous experience with RTD and knowledge of the system make them excellent prospective new riders.

Phase Two is also directed at commuters who have never ridden the bus, but have considered it, or will consider it, and who will sample the bus system as a result of the benefits and the motivation provided by the program.

#### 6.1 PROPOSED TV COMMERCIAL CONTENT

This description of the proposed commercials addresses the objectives of the communications and not the creative execution. The latter would be developed after the proposed budget has been approved. Three commercial subjects are planned. While commercials can be produced individually, it is sizably more cost efficient to produce all three commercials during the same production period. Additionally, savings are substantial when more than one commercial with similar visual content can be developed and produced as a group.

In keeping with the expected diminished demand for RTD service the following themes and use patterns have been established for three commercials comprising the proposed program.

#### 6.2 COMMERCIAL I - RIDERSHIP RETENTION:

This commercial would run in FY '85 in anticipation of the fare increase. Its active life is not limited to the May/June '85 period, since it can be



interspersed with the other two commercials during FY '86. Its primary objective is to minimize ridership loss when new fares take effect. It would emphasize and remind riders of the discomfort, inconveniences and expense of auto commuting, while pointing up the benefits they now enjoy riding RTD.

6.3 COMMERCIAL II - NEW RIDER ACQUISITION:

This commercial is intended for airing after July 1, 1985, and is aimed at non-users of the RTD bus system. It would focus primarily on the benefits of using the bus and its attributes while dratmatizing the negatives of commuting by car. The objective is to regain old riders and attract new riders to the system.

6.4 COMMERCIAL III - BENEFITS OF THE BUS PASS:

This commercial would also run during the pre-fare increase period of FY '85, but subordinate to Commercial I. It would also run alternately during FY '86. Objective of this commercial is to attract new riders to the system and assist with the retention of current riders by promoting the economic benefits of the Pass versus the car. It would provide a completely rational, dollars and cents reason for riding the bus.

This represents the recommended message content of the Program. It deals with the impending situation head on, and represents an assertive strategy for retention and acquisition of riders, given the expected negative impact of the fare increase and service reduction.

7.0 PROPOSED TV FLIGHT SCHEDULES

7.1 ENGLISH SPOTS

<u>FY</u>	<u>MONTH</u>	<u>NUMBER OF WEEKS</u>	<u>NUMBER OF SPOTS</u>	<u>GRP's</u>	<u>COST</u>
85	May	2	36-48	240	\$ 82,360
85	June	2	36-48	240	82,360
86	July	2	36-48	240	82,360
86	Aug	2	36-48	240	82,360
86	Sept	2	30-42	200	68,633
86	Oct	2	30-42	200	68,633
86	Nov	1	15-21	100	33,698
86	Dec	0			
86	Jan	0			
86	Feb	2	30-42	200	68,633
86	March	2	30-42	200	68,633
86	April	<u>2</u>	<u>30-42</u>	<u>200</u>	<u>68,633</u>
TOTALS		19 Weeks over 47 Weeks	309-423	2,060	\$706,303

7.2 SPANISH SPOTS

<u>FY</u>	<u>MONTH</u>	<u>NUMBER OF WEEKS</u>	<u>NUMBER OF SPOTS</u>	<u>GRP's</u>	<u>COST</u>
85	May	2	28	88	\$ 16,015
85	June	2	28	88	16,015
86	July	2	28	88	16,015
86	Aug	2	28	88	16,015
86	Sept	2	28	88	16,015
86	Oct	2	28	88	16,015
86	Nov	1	14	44	8,005
86	Dec	0			
86	Jan	0			
86	Feb	2	28	88	16,015
86	March	2	28	88	16,015
86	April	<u>2</u>	<u>28</u>	<u>88</u>	<u>16,015</u>
TOTALS		19 Weeks over 47 Weeks	266	83	\$152,140

8.0 EXHIBITS ON FOLLOWING PAGES

- 8.1 Exhibit I: Los Angeles DMA
- 8.2 Exhibit II: Distribution by AUA
- 8.3 Exhibit III: TV Households by County & Regions
- 8.4 Exhibit IV: Map of Los Angeles Marketing Area
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- 8.15 Exhibit XV: Television Spot Costs Per Point
- 8.16 Exhibit XVI: RTD Riders vs. Populati~~o~~

LOS ANGELES, CA



**MARKET TYPE**  
DMA TV Ratings Estimates  
**MAP LEGEND**

● City Location  
— State Line

□ CONSOLIDATED METRO AREA

LOS ANGELES

▨ LOCAL DMA

LOS ANGELES, PALM SPRINGS

THE LOS ANGELES TELEVISION MARKETI. HOUSEHOLD DISTRIBUTION

<u>TELEVISION AREA (DMA)</u>	<u>TOTAL HOUSEHOLDS</u>	<u>TV HOUSEHOLDS</u>	<u>TV HOUSEHOLDS AS A % OF TOTAL HH</u>
	4,539,500	4,383,340	96.6
<u>L.A. METRO AREA</u>	<u>3,663,377</u>	<u>3,537,120</u>	<u>96.6</u>
Los Angeles Co.	2,859,885	2,759,920	96.5
Orange Co.	803,492	777,200	96.7
<u>BALANCE OF TV AREA</u>	<u>876,123</u>	<u>846,220</u>	<u>96.6</u>
San Bernardino Co.	363,160	349,030	96.1
Riverside Co.	285,989	274,140	95.9
Ventura Co.	199,738	196,800	98.5
Kern Co. (E)	18,158	18,830	N/A
Inyo Co.	9,078	7,420	81.7

II. PENETRATION DATA

	<u>PERCENT OF TOTAL HOUSEHOLDS</u>
All Television	97%
Color Television	90%
UHF Capability	97%
Multi-Set (More than one TV)	56%
Cable Television	29%

Source: Nielsen DMA Test Market Profiles, 1984

THE LOS ANGELES TELEVISION MARKETI. TV HOUSEHOLDS - BY COUNTY:

<u>TELEVISION AREA (DMA)</u>	<u>TV HOUSEHOLDS</u>	<u>PERCENT DISTRIBUTION</u>	
		<u>(DMA)</u>	<u>METRO AREA</u>
<u>TELEVISION AREA (DMA)</u>	<u>4,383,340</u>	<u>100%</u>	<u>N/A</u>
<u>L.A. METRO AREA</u>	<u>3,537,120</u>	<u>80.7%</u>	<u>100%</u>
Los Angeles Co.	2,759,920	63.0%	78.4%
Orange Co.	777,200	17.7%	21.6%
<u>BALANCE OF AREA</u>	<u>846,220</u>	<u>19.3%</u>	<u>N/A</u>
San Bernardino Co.	349,030	8.0%	N/A
Riverside Co.	274,140	6.3%	N/A
Ventura Co.	196,800	4.4%	N/A
Kern Co. (E)	18,830	.4%	N/A
Inyo Co.	7,420	.2%	N/A

II. TV HOUSEHOLDS - BY L.A. COUNTY REGION:

<u>REGION</u>	<u>ESTIMATED HOUSEHOLDS</u>	<u>ESTIMATED % DISTRIBUTION</u>
Westside	355,310	11.6%
Los Angeles Central	350,816	11.4%
Southeast	309,879	10.2%
San Fernando Valley	574,000	18.7%
San Gabriel Valley	476,181	15.5%
South Bay	394,571	12.8%
Long Beach	437,729	14.3%
Glendale	173,251	5.6%
	<u>3,071,737</u>	<u>100.0%</u>

I. Source: Nielsen DMA Test Market Profiles, 1984

II. Source: Los Angeles Times Market Research, 1983

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**LOS ANGELES  
MARKETING AREA**

LOS ANGELES TIMES  
MARKETING RESEARCH

**LEGEND**

———— Major Economic Areas  
———— Minor Economic Areas

- ① San Fernando Valley Area
  - San Fernando
  - Sunland
  - Burbank
  - North Hollywood
  - Encino
  - Van Nuys
  - Hollywood
  - West Hollywood
- ② Glendale Area
- ③ Pasadena Area
- ④ Pomona Foothill Area
  - Claremont
  - Pomona
  - Redlands
  - San Dimas
- ⑤ San Gabriel Area
- ⑥ Northeast Area
- ⑦ East Area
- ⑧ Central Area
- ⑨ Western Area
- ⑩ Hollywood Area
- ⑪ Beverly Hills Westwood Area
- ⑫ Santa Monica South Bay Area
  - Santa Monica
  - Culver City
  - Inglewood
  - Watts
- ⑬ Adams Inglewood Area
  - Adams
  - Inglewood
- ⑭ Southeast Area
  - Compton
  - Long Beach
  - Lakewood
  - Torrance
- ⑮ Whittier Norwalk Area
  - Whittier
  - Norwalk
- ⑯ South Coast Area
  - Newport Beach
  - Laguna Hills
  - Laguna Beach
  - San Juan Capistrano
  - Orange
  - Fullerton
  - Anaheim
  - Brea
  - Tustin
  - Santa Ana
  - Irvine
  - Newport
  - Laguna Hills
  - Laguna Beach
  - San Juan Capistrano
  - Orange
  - Fullerton
  - Anaheim
  - Brea
  - Tustin
  - Santa Ana
  - Irvine
- ⑰ Balance of Los Angeles County
- ⑱ Orange County
  - Newport
  - Laguna Hills
  - Laguna Beach
  - San Juan Capistrano
  - Orange
  - Fullerton
  - Anaheim
  - Brea
  - Tustin
  - Santa Ana
  - Irvine



MARKET DEMOGRAPHICSPOPULATIONLOS ANGELES DMADEMOGRAPHIC

	<u>POPULATION</u>	<u>PERCENTAGE OF TOTAL ADULTS</u>	
TOTAL ADULTS (18+ years)	8,790,000	100%	
			<u>% OF TOTAL MEN</u>
<u>MEN</u>			
Total - 18 Plus	4,224,000	48	100
18-34 Years	1,868,000	22	44
18-49 Years	2,976,000	34	71
25-49 Years	2,206,000	25	52
25-64 Years	2,987,000	34	71
			<u>% OF TOTAL WOMEN</u>
<u>WOMEN</u>			
Total - 18 Plus	4,566,000	52	100
18-34 Years	1,861,000	21	42
18-49 Years	2,990,000	34	65
25-49 Years	2,237,000	25	49
25-64 Years	3,099,000	35	68
Working (18 Plus)	1,845,000	21	40

Source: Nielsen DMA Test Market Profiles, 1984

LOS ANGELES MEDIA COMPARISONSI. MEDIA AVAILABILITY

<u>Radio</u>	<u>90</u>
Commercial AM	31
Commercial FM	59
<u>Newspaper (Major)</u>	<u>22</u>
Metropolitan	2
Daily Community	20
(Weekly/Semi Weekly Shoppers	300+)
<u>Television Stations (Commercial)</u>	<u>12</u>
Network Affiliates (VHF)	3
Independent (VHF)	4
Commercial (UHF)	5
(Non-Commercial Stations	3)
<u>Cable Television Companies</u>	<u>26</u>

II. DISTRIBUTION OF TIME SPENT WITH ALL MEDIA

<u>MEDIUM</u>	<u>PERCENTAGES</u> <u>(ALL ADULTS)</u>
Television	53
Radio	33
Newspapers	9
Magazines	<u>6</u>

100% of Media Time

III. AVERAGE RATINGS AND COSTS PER RATING POINTS

<u>MEDIUM</u>	<u>AVERAGE</u> <u>RATING</u>	<u>AVERAGE</u> <u>CPP*</u>
Television: Prime :30's (Household Rating)	11	\$ 380.00
Radio: 6 AM - 7 PM :60's (Adults 18+)	1	\$ 427.00
Newspaper: Top 3 Daily Papers '6 col. x 14" (LA County Households)	14	\$ 743.55

\*Based on G/B/F media cost estimates.

INDEX OF TELEVISION VIEWINGBY SEASON - BY DAYPART  
(Households)

	<u>Prime Time 8-11 PM</u>	<u>Early Fringe 5-7:30 PM</u>	<u>Daytime 10 AM-4:30 PM</u>
<u>ANNUAL AVERAGE</u>	<u>100</u>	<u>100</u>	<u>100</u>
1st Quarter (Jan-Mar)	110	115	110
2nd Quarter (Apr-June)	97	90	95
3rd Quarter (July-Sept)	<u>/90/</u>	85	100
4th Quarter (Oct-Dec)	107	105	97

HOW TO READ: During the summer (Jul-Sept) the average family views 10 percent less prime time TV than the yearly average.

SOURCE: Media Market Guide, 1984.

INDEX OF TELEVISION VIEWINGBY AGE - BY SEX

	Total Weekly Hours Viewed	Index	Average Weekly Hours Viewed		
			Prime Time 8-11PM	Early Fringe 4:30-7:30PM	Daytime 10 AM - 4:30 PM
<u>All Persons</u>	<u>50.4</u>	<u>100</u>	<u>100</u>	<u>100</u>	<u>100</u>
<u>Total Men</u>	<u>22.4</u>	<u>100</u>	<u>99</u>	<u>93</u>	<u>55</u>
18-24	20.8	93	88	91	51
25-34	19.2	86	91	75	40
35-44	19.0	85	94	75	38
45-54	21.4	96	100	88	47
55-64	27.5	123	115	118	74
65 +	30.8	138	115	134	102
<u>Total Women</u>	<u>28.0</u>	<u>100</u>	<u>101</u>	<u>107</u>	<u>145</u>
18-24	26.8	96	94	95	160
25-34	25.9	93	99	91	<u>136/</u>
35-44	25.8	92	98	96	119
45-54	26.2	94	102	100	121
55-64	30.7	110	106	127	147
65 +	33.1	118	109	9	174

HOW TO READ: Women 25-34 years of age view 36 percent more TV during daytime than the average person.

SOURCE: Simmons Market Research Bureau, 1983 Study of Media and Markets.

INDEX OF SETS-IN-USE  
BY HOUSEHOLD INCOME  
PER DAYPART

	<u>PRIME TIME</u> <u>8-11 PM</u>	<u>EARLY FRINGE</u> <u>4:30-7:30 PM</u>	<u>DAYTIME</u> <u>10 AM-4:30 PM</u>
<u>TOTAL SETS-IN-USE</u>	100%	100%	100%
<u>HOUSEHOLD INCOME</u>			
Under \$15,000	93	107	117
\$20,000+	104	95	84
\$30,000+	105	93	83
\$40,000+	104	90	76

SOURCE: A. C. Nielsen Audience Demographics Report

INDEX OF NEWSPAPER READERSHIP  
(WEEKDAY READERSHIP - TOTAL ADULTS)

	<u>INDEX</u>
<u>TOTAL ADULTS</u>	<u>100</u>
18-24 Years	<u>/91/</u>
25-34 Years	96
35-44 Years	103
45-54 Years	106
55-64 Years	108
65 Plus Years	101

HOW TO READ: There is a 9 percent lower concentration of adults 18-24 years in the audience of an average weekday newspaper than there is in the population at large.

SOURCE: W.R. Simmons & Associates

EFFICIENCY COMPARISONSBY MEDIA TYPE(COST-PER-THOUSAND REACHED)

	<u>TV-30 SECONDS PRIME/FRINGE</u>	<u>RADIO-60 SEC. 6AM-7 PM</u>	<u>NEWSPAPER 84 COLUMN INCHES</u>
<u>MEN</u>			
18-Plus Years	\$ 10.04	\$ 5.98	\$ 8.63
18-49	16.53	6.89	12.73
<u>WOMEN</u>			
18-Plus Years	7.90	4.86	8.63
18-49	14.84	5.94	12.73
<u>ADULTS</u>			
18-Plus Years	5.80	2.70	8.63
18-49	6.57	3.21	12.73

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
JUNE/JULY, 1985  
PRELIMINARY PLANNING - NEWSPAPER COST COMPARISON

NEWSPAPER	INSERTION DATE	TOTAL CIRC.	LA COUNTY CIRCULATION	LA COUNTY AS % OF TOTAL CIRC.	LA COUNTY % COVERAGE	NET COST	6 Column x 14" Ad	
							CPM LA COUNTY	CFP LA COUNTY
Los Angeles Times	Sunday	1,321,244	853,700	64.6	30.2	\$ 19,309	\$ 22.62	\$ 636.37
Herald Examiner	Sunday	289,969	219,900	75.8	8.0	8,954	40.72	1,119.25
Daily News	Sunday	262,906	138,850	85.2	4.9	3,784	27.25	772.24
San Gabriel Valley Tribune	Sunday	81,172	71,000	87.5	2.5	1,925	27.11	1,170.00
Downtown/Civic Center News	Monday	42,000	42,000	100.0	1.5	954*	22.71	636.00
La Opinion	Sunday	43,983	43,983	100.0	1.6	887	20.17	554.38
Los Angeles Sentinel	Thursday	30,050	30,050	100.0	1.1	1,350	44.93	1,227.27
Santa Monica Outlook/Saturday	Sunday	251,853	144,350	57.3	5.1	3,095	21.44	606.86
So. Bay Breeze/San Pedro Pilot	Saturday							
Glendale News	Sunday	17,024	17,024	100.0	.6	964	56.63	1,606.67
Pasadena Star News	Sunday	<u>47,140</u>	<u>41,500</u>	88.0	<u>1.5</u>	<u>2,043</u>	<u>49.23</u>	<u>1,362.00</u>
TOTALS:		2,287,341	1,602,357		57.0	\$ 43,265	\$ 27.00 (Average)	\$ 759.04 (Average)

\*Downtown/Civic Center News rate based on reduction of standard newspaper size of 6 col x 14" (D/CCN size: 6 col x 11" - 10-1/16 x 11"). Ad cost without reduction would be \$1,571/net (8 col. x 14"/double truck).

2/1/85



ANALYSIS OF MEDIA DELIVERY  
REACH/FREQUENCY AND COST COMPARISONS

LOS ANGELES

	<u>REACH</u>	<u>FREQ.</u>	<u>COST</u>
<u>NEWSPAPER (Full Page)</u>			
10 Papers (L.A. Co.) 1 Per Week/4 Weeks	65%	4.2X	\$ 259,592
2 Papers (L.A. Co.) 1 Per Week/4 Weeks	40%	4.3X	169,580
 <u>SPOT TV (30-second spots)</u>			
1/2 Prime/1/2 Fringe (75 GRP/wk-4 Weeks = 300 GRP)	70%	4.3X	\$ 152,550
1/3 Prime/2/3 Fringe (75 GRP/wk-4 Weeks = 300 GRP)	69%	4.3X	106,335
1/3 Prime/2/3 Fringe (100 GRP/wk-4 Weeks = 400 GRP)	75%	5.3X	141,630
1/3 Prime/2/3 Fringe (150 GRP/wk-4 Weeks = 600 GRP)	80%	7.5X	216,670
 <u>RADIO (:60-second spots)</u>			
12-14 Stns. @ 20/wk (250 GRP/wk-4 weeks = 1000 GRP)	78%	12.8X	\$ 303,562
9-12 Stns. @ 20/wk (200 GRP/wk-4 weeks = 800 GRP)	70%	11.4X	241,574
6-8 Stns. @ 20/wk (150 GRP/wk-4 weeks = 600 GRP)	59%	10.2X	182,320
4-6 Stns. @ 20/wk (100 GRP/wk-4 weeks = 400 GRP)	46%	8.7X	123,066

ANALYSIS OF MEDIA DELIVERYREACH/FREQUENCY COMPARISONS BY BUDGET LEVEL

	<u>REACH</u>	<u>FREQ.</u>	<u>COST*</u>
<u>Example I (\$373,445 Budget Level)</u>			
Newspaper - 2 Dailies (F.P.) - 3 Insertions	40%	3.2X	\$ 84,790
Spot TV - 1/3 Prime/2/3 Fringe - 300 GRP	69%	4.3X	106,335
Radio - 6-8 Stations @ 20/Wk - 600 GRP	59%	10.2X	182,320
<u>Example II (\$496,256 Budget Level)</u>			
Newspaper - 2 Dailies (F.P.) - 4 Insertions	40%	4.3X	\$ 113,052
Spot TV - 1/3 Prime/2/3 Fringe - 400 GRP	75%	5.3X	141,630
Radio - 9-12 Stations @ 20/Wk - 800 GRP	70%	11.4X	241,574
<u>Example III (\$649,497 Budget Level)</u>			
Newspaper - 10 Dailies (F.P.) - 3 Insertions	65%	3.1X	\$ 129,265
Spot TV - 1/3 Prime/2/3 Fringe - 600 GRP	80%	7.5X	216,670
Radio - 12-14 Stations @ 20/Wk - 1000 GRP	78%	12.8X	303,562

\* All costs shown are net.

LOS ANGELES SPOT TELEVISIONCOST PER POINTS (Gross w/o Fee)\*

<u>DAYPART</u>	<u>1985</u> <u>2nd Q.</u>	<u>1985</u> <u>3rd Q.</u>	<u>1985</u> <u>4th Q.</u>	<u>1986</u> <u>1st Q.</u>	<u>1986</u> <u>2nd Q.</u>
Daytime 7 AM-4:30 PM	\$ 213	\$ 203	\$ 220	\$ 209	\$ 257
Early Fringe 4:30-7:30 PM	234	223	260	247	304
Late Fringe 11:30 PM-1:00 AM	287	273	300	285	351
Prime Time 8:00-11:00 PM	783	743	784	745	916

\*G/B/F Estimates

RTD SECTOR RIDERSHIP VS. POPULATION

<u>RTD SECTOR</u>	<u>TOTAL RIDERS</u>	<u>% OF RIDERS</u>	<u>POPULATION*</u>	<u>% OF POP.</u>	<u>INDEX RIDERS TO POPULATION</u>
San Fernando Valley	62,000	10%	1,144,162	15%	67
North Central/ Glendale	24,800	4%	641,003	9%	44
San Gabriel Valley/ East	62,000	10%	1,219,100	17%	59
West Los Angeles	198,400	32%	1,449,639	20%	160
South Central/Compton	99,200	16%	690,166	9%	178
East Central/East L.A.	31,000	5%	228,734	3%	167
South Bay/Torrance	62,000	10%	705,603	10%	100
Long Beach/Lakewood	55,800	9%	666,547	9%	100
Mid Cities/Norwalk	<u>24,800</u>	<u>4%</u>	<u>620,238</u>	<u>8%</u>	50
	620,000	100%	7,365,192	100%	

SOURCE: LOS ANGELES TIMES "IN PERSPECTIVE", 1982

## 9.0 GLOSSARY

Area of Dominant Influence (ADI): A television viewing area definition in which counties or portions of counties are assigned to the market from which they receive at least 50% of their viewing (originating stations). Therefore, Ventura County is assigned to the Los Angeles ADI because its population views more programs originating from Los Angeles than from any other market. All counties or sub-counties are assigned to one ADI exclusively. These areas may also be referred to as "Designated Marketing Areas (DMA)".

Cost-Per-Rating-Point (C/GRP): A rating point is equivalent to one-percent of a given universe (i.e., television households). If a television program is providing a 10 rating (10% of TV Households) and costs \$600. for a :30-second commercial, the cost-per-rating point would be \$60. This is used as a measure of efficiency for comparative purposes.

Cost-Per-Thousand: A measure of efficiency for delivering a specific target audience. If a :30-second television commercial costs \$600. and delivers an audience of 95,000 women between the ages of 18 and 24 years, the cost to reach one thousand of those women is \$6.32. This is a useful measurement to compare the efficiency of delivering specific target audiences.

Daypart(s): The standardized definitions of the segments in a day, used to describe blocks of time for broadcast media.

<u>Television:</u>	Prime Time	-	8:00 PM - 11:00 PM
	Prime Access	-	7:30 PM - 8:00 PM
	Early Fringe	-	4:30 PM - 7:30 PM
	Late Fringe	-	11:30 PM - 1:00 AM
	Daytime	-	7:00 AM - 4:30 PM
	Late Night	-	1:00 AM to Sign-Off

<u>Radio:</u>	Morning Drive	-	6:00 AM - 10:00 AM
	Daytime	-	10:00 AM - 3:00 PM
	Afternoon Drive	-	3:00 PM - 7:00 PM
	Evening Time	-	7:00 PM - Midnight
	Late Night	-	Midnight to 6:00 AM

Designated Market Area (DMA): A television viewing area definition.

See "Area of Dominant Influence."

Demographics (Demographic Profile): The terminology used to describe population in terms of vital statistics (i.e., age, sex, education, family size, household income, etc.). This terminology, when combined, forms definitions of target audiences. For example: Men, 25-49 years of age, with household incomes in excess of \$15,000 per annum.

Efficiency: The means for comparison of media on an equal basis. See "Cost-Per-Rating-Point" and "Cost-Per-Thousand" for definitions.

Frequency: The number of times an individual (or home) is exposed to an advertising message usually expressed as an "Average Frequency" when speaking in terms of a target audience. This is normally used in conjunction with "Reach" of the target audience, such as "The campaign reached 70 percent of all men an average of 4.3 times (70/4.3)."

Gross Rating Points (GRP's): The sum total of the ratings delivered by a media schedule. One rating point is equal to one percent of the defined target audience. For example, if the medium is television and the target is all households and a schedule were to include 14 :30-second commercials, each delivering an average of a 17 rating (17% of households each), the gross rating points in that schedule would be 238 (14 spots times a 17 rating = 238 GRP). Depending on the daypart combination, this schedule would reach approximately 63% of the households an average of 3.8 times. Another definition useful in media analysis is that the percent of "Reach" (63%) times the "Average Frequency" (3.8) is equal to the gross rating points (63 times 3.8 = 238).

Gross Impressions (G.I.): The sum total of the exposures to a media schedule in terms of the numbers of a target audience as opposed to GRP's, which are percentages. For example, if a schedule delivers 238 household gross rating points in the Los Angeles ADI, the gross household impressions are equal to total TV households (3,638,680) multiplied by 238 GRP (or 238%), achieving total household impressions of 8,660,000. This also relates to reach and frequency. In the preceding example the estimated reach was 63% of the households (3,638,680 x .63 = 2,290,000) and the average frequency was 3.8 times (2,290,000 x 3.8 = 8,700,000). As shown, both methodologies yield an answer within less than one-half of one percent variation and that variation is due to the rounding-off of percentages.

Households-Using-Television (HUT): The percent of homes using television at any given time. If 3 of every 5 TV households are watching TV (any station) the HUT level is 60 percent. This measurement is sometimes referred to as "Sets-In-Use" (SIU).

Rating (Rating Points): The percent of homes (or individuals) exposed to a particular program. If one of every five TV households is watching a given program, that program's rating is 20 points.

Reach: The number of different homes (or individuals) exposed to a media schedule, expressed as either a numerical figure or a percentage. If a schedule develops a total of 238 household gross rating points (equivalent to 238% of total TV households), the net reach (depending on the daypart combination) would be approximately 63 percent of the households. The reach of a schedule is usually combined with the average frequency (average number of times exposed to a message) and frequency is determined by dividing the total gross rating points by the net reach ( $238 \div 63 = 3.8$  times avg. freq.).

Penetration: The percentage of persons (or homes) that are physically able to be exposed to a medium. For example, 97 percent of U.S. homes own a television set and 74 percent of homes in the Los Angeles ADI own a color TV set. Therefore, television penetration is 97% and color TV penetration in Los Angeles is 74%.

Sets-In-Use (SIU): The percent of homes using television at any given time. See "Households-Using-Television" (HUT).



Share: The percent of "Households-Using Television" that are tuned to a particular program. If the "HUT" is 3 of 5 homes and Program "A" is being watched by 1 of the 3 HUT Homes, Program "A" has a 20 rating (1 of 5 TV Households) but a 33 percent "Share" (1 of 3 HUT).

VHF/UHF: "VHF" means Very High Frequency and refers to television stations numbered 2 through 13. These channels generally have an effective signal pattern of a fifty mile radius. "UHF" means Ultra High Frequency and refers to television stations numbered 14 through 83 with an effective signal pattern of generally less than fifty miles.