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MEDIAWEEK

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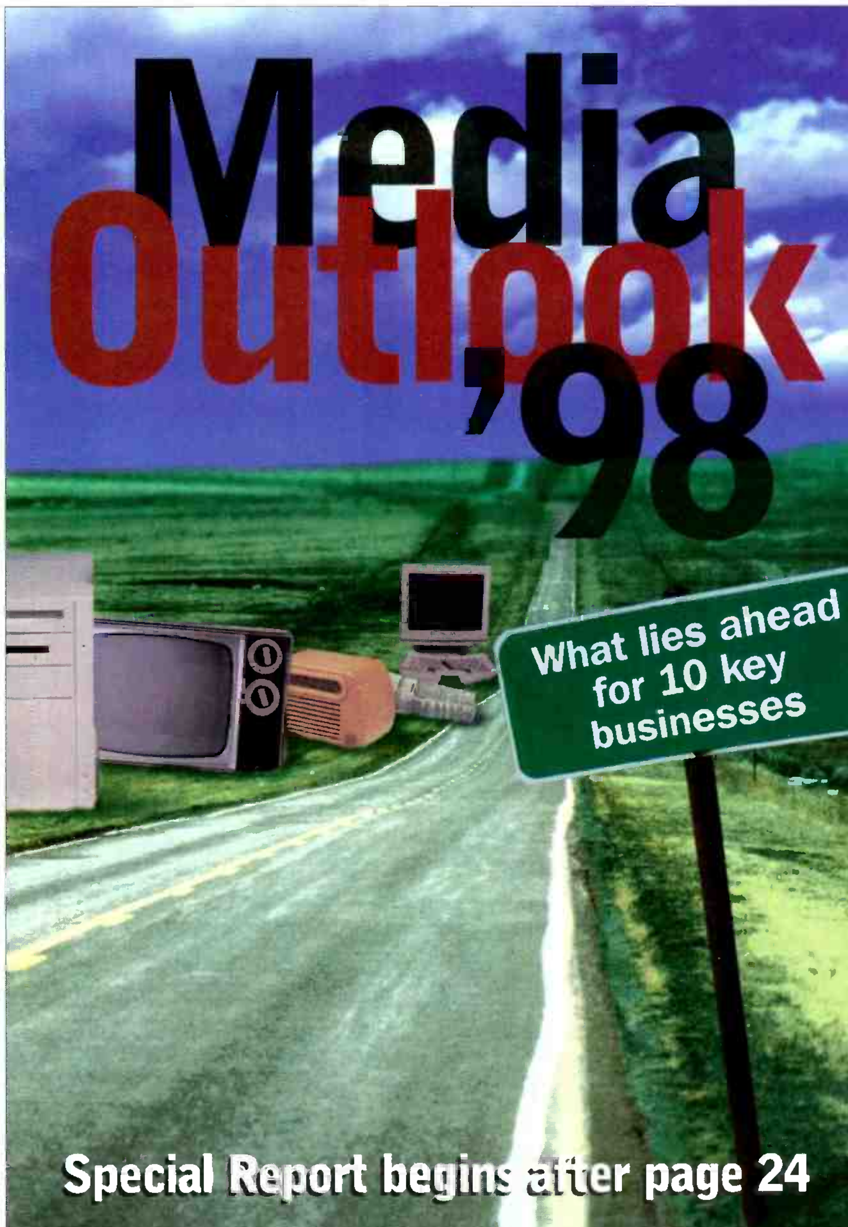

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Cable's New No. 1

Time Warner swaps its way to top MSO spot PAGE 4

MARKET INDICATORS

National TV: Active
Prime time and news are starting to move, with CPMs at 25 percent above upfront prices. Money is starting to flow in from prescription drugs to take advantage of looser ad-content restrictions.

Net Cable: Slow
Sales execs are still trying to close third quarter. Last week's ratings winners: the U.S. Open on USA was up 17 percent in prime; MTV's awards show was up 39 percent, to a 7.5.

Spot TV: Mixed
Pacing for 4th quarter has been healthy, up 3-4 percent above last year. Early September slowed, but business is being written for mid-month through October.

Radio: Booming
Chicago, New York are tightening. Philadelphia is entirely sold out. MCI and other telecoms slug it out in top 30 markets as they seek to break into new regional and local-service categories.

Magazines: Active
Sports and fitness are the rage. Launches into the field and a flurry of redesigns of existing books are seeking untapped ad dollars.

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Laura K. Jones SEP 11 1997

AT DEADLINE

TVB: Cable to Post Double-Digit Ad Gain in '97

Cable television continues to make strong gains in this year's advertising bull market. Cable is estimated to reap $7.1 billion in revenue for 1997, according to closing projections by the Television Bureau of Advertising. Based on projected 10 to 12 percent increases for this year (compared to 1996), cable is expected to post 11 percent to 13 percent gains for 1998 as well. As for broadcast media, TVB predicts 5 to 7 percent increases in spot TV for 1998; 6 to 8 percent hikes in local TV; 5 to 7 percent increases for network TV; and 4 to 6 percentgains for national syndication. As part of its Forecasting Conference last week in New York, the TVB also issued a preliminary closing estimate of $44.6 billion for total television advertising in 1997, up 4.9 percent over 1996. By category, TVB's end-of-year 1997 estimates: local TV, $11.4 billion (up 3-5 percent); spot TV, $10.1 billion (up 2-4 percent); network, $13.6 billion (up 3-5 percent); syndication, $2.3 billion (up 4-6 percent).

Hollings Recants on FCC Nominee

Sen. Ernest Hollings, (D-S.C.), ranking minority member on the Senate Commerce Committee, announced last week that he will support William Kennard as President Clinton's choice to become Federal Communications Commission chairman. Hollings had previously lobbied for his own candidate and former aide, communications attorney Ralph Everett. Incumbent FCC chairman Reed Hundt has announced that he will step down as soon as a replacement is confirmed. Commerce Committee chairman Sen. John McCain (R-Ariz.) expects to hold an Oct. 1 hearing on Kennard's nomination.

LIN TV Shareholders File Suits

Dallas-based buyout firm Hicks, Muse, Tate, & Furst's $1.4 billion acquisition of Providence-R.I.–based LIN Television is under fire from four separate shareholder lawsuits made public last week. Each suit alleges a breach in fiduciary duty. Three suits were filed in Delaware's chancery court and one in the New York State Supreme Court; all assert that the merger is not in the best interests of shareholders and seek either a suspension of the merger or compensatory damages. LIN is a defendant in all four lawsuits; AT&T, which owns 45 percent of LIN, is named in three; and Hicks, Muse is named in one. LIN owns 11 TV stations in several major markets.

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ESPN's Bornstein wins a Classic 09

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Nissan Pulls Out of Magazines for Rest of '97

Japanese automaker Nissan has pulled a substantial amount of its scheduled magazine advertising for the balance of this year, sources said last week. "They pulled millions, almost across the board, for budgetary reasons," a source at a major magazine publisher said. Time Inc. is said to have been hit hard by the pullback, having lost pages in several of its books. A spokesman for TBWA Chiat Day, Nissan's agency, declined to comment. Last year, Nissan spent $49.9 million on magazine and Sunday-magazine ads, according to industry records. Through June this year, Nissan spent $28.7 million in magazines; the automaker's total spending on advertising was $213.9 million.

Fourth Estate Loses Some Top Guns

The newspaper industry last week played a fierce game of management musical chairs. Pete Hamill ended his eight-month tenure as editor-in-chief of the New York *Daily News* on Thursday. Reports of tension between Hamill and *News* owner Mort Zuckerman had been circulating for weeks before the announcement. *Hartford Courant* editor-in-chief David Barrett resigned after 27 years with the Times Mirror daily, Connecticut's largest paper. Barrett chose to leave the paper, which has been hit with steep circulation losses, rather than take a demotion. *The Boston Globe*'s executive vp and cfo, William Huff, was named president of the paper. Huff succeeds Benjamin Taylor, who becomes the paper's publisher. And in Phoenix, the *Arizona Republic* merged two managing editor positions into one "to bring people together under one leader," said executive editor Pam Johnson. Steve Knickmeyer became managing editor for all news operations. Don Henniger, former managing editor for *Republic* presentation, remains with the paper in an unspecified editorial position.

ABP Picks Shih for Marketing Post

The American Business Press has made two key appointments, part of the association's effort to build its prominence in the publishing community. Peter Shih, who handled marketing projects for AT&T, joins the ABP as vp of marketing. John Holden, formerly of *Business Week* and KPMG Peat Marwick, will serve as vp of publishing services. The ABP's five-year reorganization plan will result in a change of focus for the association, from U.S. trade publishing to "global information," said Gordon T. Hughes II, ABP president .

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MEDIA WIRE

Diana's Death: Ratings Up On 24-Hour News Channels

Princess Diana's death—the first major worldwide news event since the launch of MSNBC and the Fox News Channel—gave a boost last week to the two fledgling 24-hour cable news networks. The Diana coverage also lifted CNN out of its recent ratings doldrums.

CNN scored seven of the week's (Aug. 25-31) highest-rated cable programs with its Diana coverage, reaching a 6.5 cable universe rating from midnight until 12:30 a.m. early Sunday morning, Aug. 31, according to Nielsen Media Research. From 11 p.m.-3 a.m. overnight, CNN averaged a 4.1 (2.9 million households) universe rating, Fox News Channel earned a 1.0 (213,000 households) and MSNBC had a 0.7 (243,000 households).

MSNBC's big broadcast sister, NBC, and ABC also rushed on the air late on Aug. 30 to offer live, breaking coverage. CBS, however, faltered—and subsequently apologized to its affiliates—for failing to put on Diana coverage until 1:20 a.m. Sunday morning.

Few network prime-time shows were pre-empted due to Diana's fatal car crash Saturday night. The broadcast networks did use their newsmagazine shows to follow developments in the story. For example, the day after the crash, CBS' *60 Minutes* won its time slot with Diana coverage, pulling in 15.6 million viewers. An ABC News special attracted 10.5 million people; *Dateline NBC* drew 10.3 million viewers, and Fox's *Diana: The People's Princess* reached an audience of 4.8 million. *—Richard Katz*

Petersen Reorganizes Its Automotive Group

Petersen Publishing last week extensively reorganized its automotive performance group. The unit, comprised of 17 titles, has been subdivided into six market-oriented clusters. Each cluster is now headed by newly promoted group publishers reporting to John Dianna, the *Hot Rod* executive publisher who recently was appointed president of the auto group. "By implementing this new organizational struc- *(continued on page 6)*

Time Warner

Swaps and partnerships crown a new MSO kin

CABLE TV / By Michael Bürgi

For the first time since the cable industry began to flourish in the 1980s, Time Warner—and not Tele-Communications Inc.—is the largest cable operator in the country. Time Warner Cable, the Stamford, Conn.–based, 13 million-subscriber arm of the media giant, rose to the top last week when it cut deals with TCI for several system swaps and partnerships.

Time Warner Cable has significant clusters of subscribers across the country, concentrated in major markets including New York City, Houston, Orlando, Fla., and Charlotte, N.C.

Yet even though last week's deals make Time Warner No. 1 among multiple system operators and reinforce chairman/CEO Gerald Levin's vision of the marriage of content and distribution, Levin still plays second fiddle to TCI chairman John Malone in the cable business. Via a steady stream of new partnerships this year, TCI and Malone still wield enormous power in cable. "Because of the partnerships, TCI has actually increased its footprint to 23-24 million subscribers," noted Jessica Reif, media analyst with Merrill Lynch.

And there is more to come: TCI is expected to soon announce partnerships or system swaps with Comcast and with MediaOne, the cable arm of Baby Bell U S West.

Cable network executives said that an affiliate deal with TCI is still considered more valuable than a deal with Time Warner. In the networks' eyes, TCI's stature stems from its corporate structure. Although company president Leo Hindery has moved more decision-making power to the local level, TCI's central management in Englewood, Colo., still dictates most programming decisions. By contrast, cable executives note, Time Warner's corporate staff does not force its local systems to launch channels.

MSOs: Who Controls the Top 10 Markets

Source: Nielsen Media Research

AMY GOLDBERG

"It's more valuable to have a TCI deal than a Time Warner deal," said a cable network affiliate sales executive who spoke on condition of anonymity. "With a push of a button, TCI can give you 10 million subs. TCI could go down to 8 million subs and it would still be a more valuable deal."

The cable network executive pointed out that Time Warner still has not fulfilled all of its contractual obligations to roll out Comedy Central and Court TV on its systems, even though Time Warner owns those cable services.

The balance of power between operators and programmers in negotiating carriage agreements is noticeably shifting back into the hands of the MSOs, especially those smaller

s No. 1

ut TCI still rules for now

companies that have partnered with big boys like TCI. "The joint-venture partners of TCI can do their purchasing [of programming] through TCI's purchasing arm," said Ray Katz, an analyst at Bear Stears.

Here's how last week's deals break down. The two companies announced their intent to partner and swap systems serving more than 2 million subscribers, while shifting almost $1.5 billion of debt ($800 million of it TCI's, $650 million belonging to Time Warner) off their wholly-owned balance sheets. In Houston and southern Texas, TCI and Time Warner will be 50-50 partners of more than 1 million subscribers, with T-W managing. TCI will add systems serving 95,000 subs to an existing partnership with T-W in Kansas City, Kan.

In addition, TCI will swap systems representing 600,000 subscribers in Florida, Maine, Wisconsin , New York state, Hawaii, Texas and Ohio for T-W systems representing 540,000 subs in Illinois, New Jersey, Pennsylvania, Missouri, Wyoming, Oregon and Texas.

Analysts said both companies' debt situations improved considerably from the deals, although Time Warner still carries $18 billion in debt. "So what if it's still big?" said analyst Katz. "If the cash flow is also big enough to service the debt, which it is, they could be ready to take on even more leverage. It's like describing an elephant by feeling only its leg."

TCI's wholly-owned subscriber count, meanwhile, is now down to a second-ranked 11.7 million, in large part because of the numerous partnerships the company has cut with other MSOs in recent months. TCI has also lost a steady trickle of subscribers since it raised its rates last year.

TCI's partnerships—which in addition to Time Warner include deals with Cablevision Systems Corp., Adelphia Communications, Falcon Cable TV and Intermedia Partners—have been the result of a concerted effort on the part of Hindery. Through the deals, TCI has shed a total of 2.5 million subs; Hindery plans to offload another 1.5 million. TCI has also been able to reduce its debt-to-cash-flow ratio to 5.7-to-1, down from more than 6-to-1, by shedding $3.2 billion of a planned $4.5 billion debt-reduction plan. Wall Street has reacted well to the news, as TCI's stock has risen considerably in recent weeks. *—with Richard Katz* ■

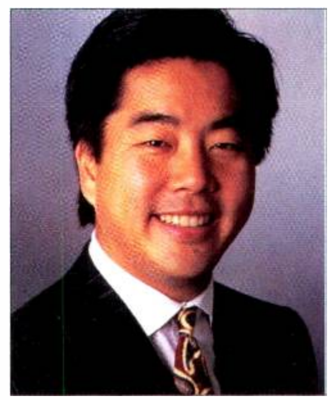
Sassa's 1st Task: Access

New NBC stations chief expected to take hard look at syndie deals

NETWORK TV / By Richard Katz and Michael Freeman

Scott Sassa, the former cable programming whiz kid hired last week to run NBC's stations, believes that his lack of broadcast experience will not be a liability to the network. "I would have been scared if I had to come in and redo the whole company," said Sassa, most recently CEO of Marvel Entertainment Group. "This is a really well-run division."

NBC hired Sassa to replace John Rohrbeck, 57, as president of the network's owned-and-operated station group. Sassa, 38, made his reputation as Ted Turner's top programming executive at Turner Broadcasting System, but he has no experience running TV stations. Rohrbeck, who has worked for NBC since 1967, will leave his post to enter a rehabilitation program for substance abuse, network representatives said.



Sassa: Lack of stations background not a concern.

Sassa will take charge of an 11-station group that brings in an estimated $500 million in annual revenue. NBC is in the the process of purchasing its 12th station, WVIT-TV in Hartford, Conn. from Viacom.

Rohrbeck oversaw NBC's recent move to bring all national spot sales responsibilities for its stations in-house, a reorganization that cost an estimated $20 million, said to be far higher than the network expected. Under Rohrbeck, NBC's Chicago outlet, WMAQ, experienced marked ratings declines this year after a controversial move to hire syndicated talk-show host Jerry Springer to provide commentary on the station's newscasts. Popular anchors Carol Marin and Ron Magers promptly quit in protest over the Springer hiring, which was initially defended by Rohrbeck. Although the Springer experiment ended quickly, WMAQ's news ratings have yet to recover.

NBC's stations have not performed well in the lucrative prime-access time period with the syndicated magazine shows *Extra* and *Access Hollywood*, which NBC produces in a partnership with Twentieth Television. "It doesn't matter if Sassa tries to cancel *Access Hollywood*—[the NBC stations] have nothing else to fill the time periods," one station rep said. "They have already put out the word they are looking for anything else in access."

Sassa defended his predecessor. "John Rohrbeck ran a great station group," he said. The new stations chief noted that "the whole game is access and afternoon shows" in the network-owned station business.

"Sassa's mandate will be to fix access and clean up WMAQ in Chicago," said another rep-firm exec who requested anonymity. "Rohrbeck has been at the company for years, and it is probably good to have someone from the outside."

Another rep noted that Sassa's early actions on *Access Hollywood* will foretell the show's future. "If Scott goes and has his picture taken with [coanchors] Giselle Fernandez and Pat O'Brien, that is a good signal," the rep said. "If he just walks past the set, it's history."

Sassa earned a reputation as a boy wonder at Turner, where he launched seven cable networks—including the highly successful TNT—in a seven-year period. He was also instrumental in helping Turner acquire the Castle Rock and New Line movie studios. Sassa rose to the position of president of Turner Entertainment Group before departing the company to join Marvel in October 1996. Sassa lost out to Terrence McGuirk in a hotly contested battle between the two executives to become chief executive of TBS after the company was purchased by Time Warner.

Before joining Turner in the late '80s, Sassa was vp of new business development at Ohlmeyer Communications, the production company which was then headed by Don Ohlmeyer. Ohlmeyer is now NBC's president, West Coast. Sassa said he has remained friendly with Ohlmeyer over the years and also knows NBC president Robert Wright quite well. In his new post, Sassa will report to Wright.

Prior to his stint at the Ohlmeyer company, Sassa was among the first executives hired by the Fox network prior to its 1986 launch. Sassa developed the fourth network's initial business plan and ran its advertising, promotions, operations and administration. Sassa began his career with Rogers & Cowan, the public relations agency. ■

MEDIA WIRE

ture, we will provide greater flexibility to meet the opportunities in the marketplace and concentrate on the group's future," Dianna said.

Petersen president Neil Vitale added that the new structure will facilitate the titles' marketing and branding efforts, top priorities for the company since Vitale and CEO Claeys Bahrenburg led an investor group in acquiring the company last year.

Hot Rod publisher Jim Savas has been named publisher of the performance group, which includes *Hot Rod* and three other titles. *Hot Rod* editor Drew Hardin has been promoted to group editorial director. Jim Ryan, publisher of *4-Wheel & Off-Road*, will serve as group publisher of the three-title truck group; *Sport Truck* editor Peter MacGillivray is editorial director. John Cobb and Chuck Schifsky will be group publisher and editorial director, respectively, of the four-title automotive youth group. Other clusters include the motorsports, personal sports and specialty products groups. *—Jeff Gremillion*

'Texas Monthly', Dow Jones Partnership Headed South

Dow Jones & Co. wants out of its investment in Mediatex, *Texas Monthly*'s parent company. *TM* officially announced plans last week to find a new financial partner; the Jordan Edmiston Group investment firm will handle the search.

Dow Jones has held an unspecified minority interest in the magazine since 1987, about the time Texas publisher Michael Levy's short-lived spin-off, *California Magazine*, folded, financially wounding Mediatex, said a company source. Since then, it's said that the company's finances have stabilized; revenue topped $22 million for the 1996–97 fiscal year, according to Mediatex. The magazine also has spun off a custom publishing unit and a successful Web site.

Texas Monthly's circulation was flat at 308,000 for this year's first half. Ad pages for the title were up 8.9 percent, to 781, through July, the Publishers Information Bureau reported.

A Dow Jones (*continued on page 8*)

Times Mags Deal Is Close

Purchase price for six titles expected to fall short of $100 million

MAGAZINES / By Jeff Gremillion

The New York Times Magazine Co. in the next two weeks will announce a buyer for the six special-interest titles the company has had for sale for several months, sources close to the negotiations said late last week.

Meredith Corp. was considered a strong favorite to emerge as the buyer, although the competition was said to have included several other finalists. The price is expected to be well under the $100 million bandied about a few months ago. A Meredith representative said the company had no comment.

Times Co. insiders said the company was being particularly tight-lipped about the sale last week. Even some high-ranking brass at the magazines were not sure how the deal has played out. "No one has named the company. [But] the buyer is definitely known," a source at the Times Magazine Co. said last Friday.

Gordon Medenica, Times Co. senior vp and group publisher of the offered titles, could not be reached for comment by press time.

The Times Co. put *Tennis*, *Tennis Buyer's Guide*, *Cruising World*, *Sailing World*, *Snow Country* and *Snow Country Business* on the block six months ago. Condé Nast and Petersen dropped out as the bidding war escalated, said sources close to the companies. Rodale Press and Reader's Digest Association were also mentioned as interested parties. Times Mirror, which initially expressed interest, is said to have dropped out of the process as it neared a conclusion. K-III was said to be in the running, but an executive there said last Friday that the company was no longer bidding.

Six months of waiting is almost over at Times' titles.

The titles on the block generated a combined $44 million in total revenue last year, the company said. The Times did not offer its more lucrative *Golf Digest* or *Golf World* titles for sale.

Meredith's first acquisition of a special-interest sports title, *Golf for Women*, in 1989, has turned into a great success for the company. The book's circulation and ad pages have been steadily rising.

Despite the uncertainty among Times Co. staffers over the buyer's identity, spirits were running high last week, said Laura McEwen, publisher of *Snow Country*. "The staff has been very motivated and has worked hard through the sale," McEwen said. "Business has been very strong, considering we've been up for sale for six months."

Advertising pages for *Tennis*, the largest book in the group, increased 27 percent through July, according to PIB. *Snow Country*, the second-largest title, slipped 3.9 percent in pages through July. ■

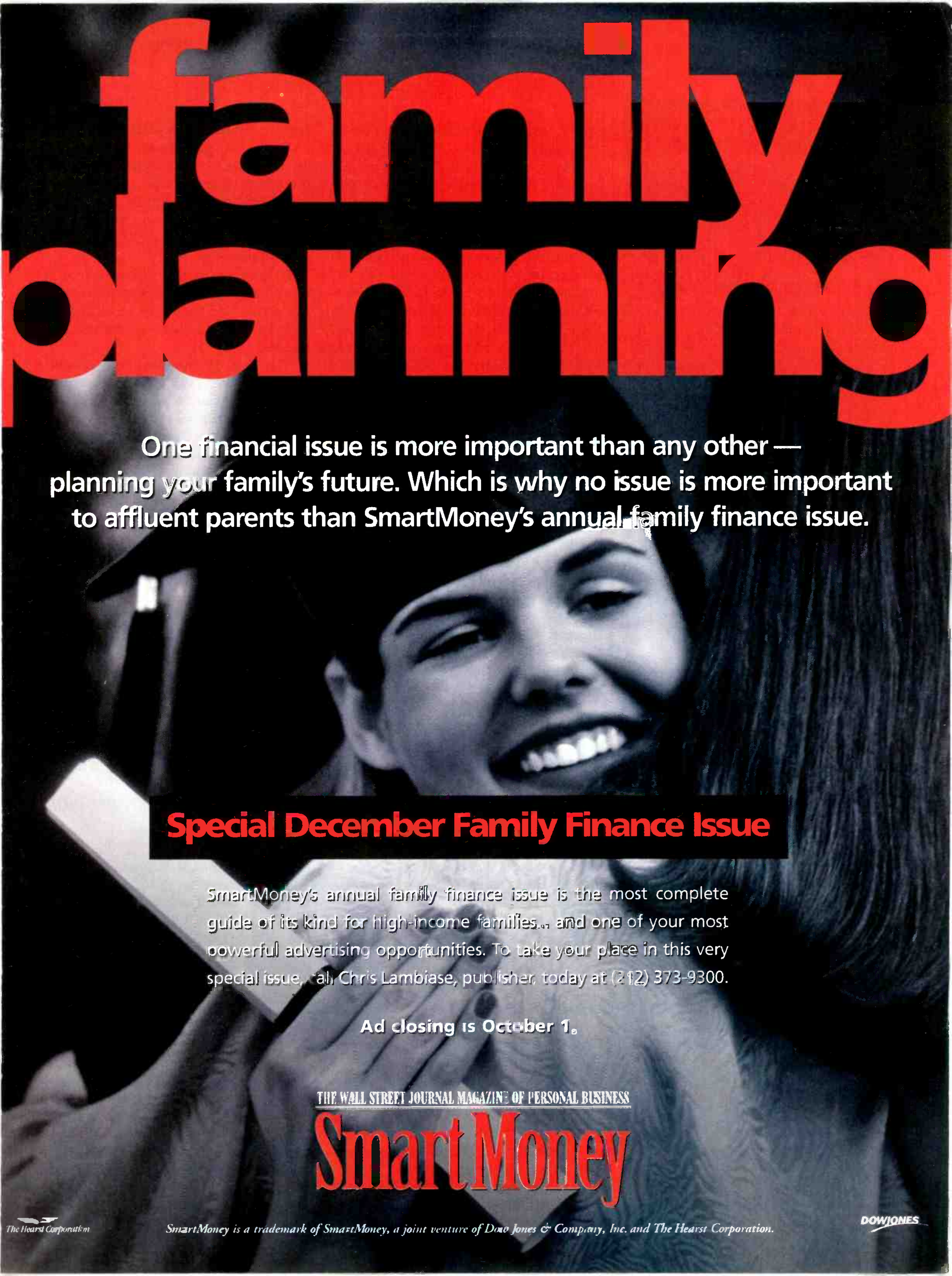
Belo Bellows in Texas Deal

Swap with Scripps sends both companies in new directions

TELEVISION / By Claude Brodesser and Michael Bürgi

A.H. Belo Corp. will reach more Texans and Scripps Howard will gain a stronger programming foothold with the nation's cable operators following an estimated $260 million deal reached last week. Dallas-based Belo will trade its 57 percent interest in The Food Network (valued at $185 million by analysts), along with $75 million in cash, to acquire Scripps Howard's San Antonio broadcast properties, CBS affiliate KENS-TV and KENS-AM (both of which Scripps will soon acquire from Harte-Hanks Communications).

The addition of KENS will make Belo the second-largest station group tied to CBS,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representative said that the company wants to focus on its core, financial-oriented businesses. *—Jeff Gremillion*

Video Grab: News at 4, 8 p.m. Seen as Coping Mechanisms

Two major East Coast TV stations are shifting their evening newscasts to meet the needs of time-conscious viewers.

In New York, Time Warner's 24-hour local news channel, New York 1 News, this week will launch *The 8 O'Clock Edition*—an hour of local news in prime time. "The day of people getting home for the 5 or 6 o'clock news is over," said Steve Paulus, NY1 vp for news.

In Philadelphia, an effort to "provide a choice" for largely female, daytime-talk-show-watching viewers is ongoing at WCAU-TV, an NBC O&O. The station will launch a daily 4 p.m. newscast on Sept. 22. "As lifestyles change, we're trying to provide places for them to watch," said Steve Doerr, news director at WCAU. *— Claude Brodesser*

Murdoch Expands Sports Empire With Dodgers Buy

Rupert Murdoch's News Corp. last week agreed to buy the Los Angeles Dodgers for an estimated $350 million. The deal, closed by second-generation Dodgers family owner Peter O'Malley, concluded months of negotiations with News Corp.

Now on deck: Major League Baseball's ownership committee, which is expected to approve the agreement and place it in front of team owners for a vote by January. Only majority approval is required in the American League, but three-fourths approval is needed in the National League, meaning four votes could overturn the agreement.

News Corp.'s Fox Broadcasting Co. and F/X and regional Fox Sports cable networks are expected to offer strong revenue streams to help recoup Murdoch's investment in the Dodgers. What remains in question is whether News Corp. will seek to recapture local broadcast rights to Dodger telecasts from the current rightsholder, Tribune Broadcasting-owned KTLA-TV in Los Angeles. *—Michael Freeman*

ranking only behind the CBS owned-and-operated stations.

The deal will make Belo even more of a Lone Star TV powerhouse in clearing programming deals with syndicators and in negotiating sweeter deals with advertising rep firms, said Ward Huey, Belo vice chairman.

Belo, already ranked 11th nationally in coverage of U.S. households, will add San Antonio to its properties in Dallas (WFAA-TV, an ABC affiliate) and Houston (KHOU-TV, CBS). "We'll cover three-fifths of the state. The Dallas and Houston markets make up 50 percent of the Texas TV market. And San Antonio makes up another 10 percent," Huey explained.

Huey and other Belo executives would not comment on whether Katz Media will continue to represent KENS-TV in selling advertising time. Sources said that Katz is unlikely to continue in that role because nearly all Belo stations are represented by New York–based TeleRep or Harrington, Righter, & Parsons.

As for Cincinnati-based Scripps, analysts said the deal puts the company in better position to gain access to distribution for its new cable properties, The Food Network and Home & Garden Television. "Scripps has traded a mature business with a high valuation for a higher-growth business at a very reasonable price," said William Bird, a senior analyst at Smith Barney in New York.

Scripps can gain greater distribution for its cable networks by bundling together the two niche networks. "We both appeal to adults 25-54 and women 25-54, and we would describe our viewers as affluent baby boomers," said Erica Gruen, The Food Network president.

If there is any potential difference between the two services, it is in programming philosophy. "Our focus is on entertainment," while HGTV's is more on information, Gruen noted.

The Food Network has been operating since November 1993 and counts some 25 million subscribers. While the channel is not yet profitable, Scripps Howard financial estimates forecast that the network will be cash-flow positive in another three years. Further, Scripps expects The Food Network will throw off $10 million in negative cash flow in 1998.

Ad sales and affiliate sales efforts are likely to be combined between The Food Network and Home & Garden, which launched in December 1994 and counts more than 30 million subscribers.

In other news at The Food Network, Eileen Opatut, a former executive vp at BBC Americas, has been hired as the service's senior vp of programming, production and operations. ■

A Big Edge in Media Buying

For Y&R and Wunderman clients, $3 billion brings more clout

AGENCIES

Young & Rubicam last week announced the creation of a media powerhouse that holds some $3 billion in buying power in its hands, drawing from its Y&R, Wunderman Cato Johnson and The Media Edge units.


CHRIS CASABURI

Gordon raises her profile.

Perched atop that group is Beth Gordon, president of The Media Edge, who retains that title and also becomes U.S. media director of the Y&R/WCJ partnership. The whole unit is being renamed The Media Edge, although Y&R's and WCJ's media-planning functions will remain separate from the buying operation, which will rank among the top five media-buying houses.

Bob Igiel, who was executive vp/director of broadcast buying and programming for Y&R, now becomes executive vp/U.S. director of The Media Edge. Mitch Burg, formerly Media Edge's planning director, becomes executive vp/U.S. director of planning and consultancy for the renamed operation. For the most part, other positions will remain relatively stable in the short term, though it is possible that the new structure could create some attrition among media buyers and planners below the level of Igiel and Burg.

The buying unit will be divvied up into several departments: national and local broadcast; media systems and technology; direct response; out-of-home and media research. Among clients affected in the deal are such big spenders as Glaxo, AT&T and Citibank. ■

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Classic Sports: First and 10

Fox passes, but ESPN tackles vintage highlights channel

CABLE PROGRAMMING

By Michael Bürgi

ESPN last week agreed to acquire Classic Sports Network, adding a fourth cable network to its stable of sports services. The price tag, which ESPN and Classic Sports executives declined to confirm, was estimated at between $150 million and $175 million.

ESPN's parent company, the Walt Disney Co., bid against News Corp., which co-owns Fox Sports Net, the largest group of regional sports networks across the country with close to 60 million subscribers. But one Fox Sports executive said that Fox passed on buying the network because "it's worth about half of what it was asking for. They don't have the programming commitments and the distribution to justify that cost."

Fox Sports will eventually develop some sort of channel or backbone service in the "vintage sports genre," as Fox Sports representative Vince Wladika put it. But he added that putting such a service together is a back-burner issue for now as Fox Sports labors to integrate the seven SportsChannel regional sports networks into the Fox Sports fold by the start of this fall's hockey and basketball seasons.

"We think there's a good concept there in what Cablevision [Systems Corp., SportsChannel's owner and now a 40 percent partner in Fox Sports] had," explained Jim Martin, COO of Fox Sports Net, referring to American Sports Classics, the scuttled classic sports network on Cablevision's drawing board earlier this year that is now controlled by Fox Sports. "It's a better mousetrap. We'll probably do it initially as a block on the regionals with the idea of expanding it at the proper time to a full network."

ESPN chairman Steve Bornstein, meanwhile, categorically denied rumors that Classic Sports Network in some way could be merged with ESPNews, the year-old all-sports news service that counts about 5 million homes (CSN counts 11 million). "We have no interest at all in merging the two services," said Bornstein. "They're two distinct services." ■


Photo: Annie Leibovitz © 1997 by the Condé Nast Publications Inc.


VOGUE
Fall

CONDÉ NAST

TV Production

"The Keenen Ivory Wayans Show," in the throes of a ratings drop, has removed Charlie Parsons as executive producer. Although Parsons is no longer involved in day-to-day production of the month-old talk show, a representative for distributor Buena Vista Television emphasized that the British native and his British-based Planet 24 Productions company will continue to work on a "consulting basis" to the late-night strip. For the time being, however, Wayans and his personal manager, Eric Gold, continue to serve as executive producers while BVT expects to hire a day-to-day show-runner to fill Parsons' slot within the next several weeks. Staffing changes at this early stage of rollout are highly unusual and surfaced after the show took out Hollywood trade ads looking for producers, associate producers and talent bookers. After delaying release of the first three weeks of *Keenen* ratings, the Nielsen Syndication Service report had the show posting identical 2.0 rating averages (aggregate, Aug. 11-24), but was still reprocessing its debut week (Aug. 4-10). The national numbers marked a disappointing 33 percent ratings dropoff from the show's 3.0 rating/8 share average (NSI, Aug. 4-27) in the larger urban, metered markets.

Call it "As the Oprah Turns." Speculation has again surfaced that Oprah Winfrey will not renew her option to return to her top-rated talk show beyond the 1997-98 season. Fueling the latest fire to the almost annual rumor was a report last week by KTLA-TV (Los Angeles) entertainment reporter Sam Rubin, citing a close source to Winfrey as saying the 11-year talk vet is leaning towards calling it quits. Meanwhile, Winfrey's Chicago-based Harpo Productions company issued a statement only restating that Oprah will make her decision Sept. 15, the date in which she must exercise a contract option with syndicator King World Productions. A decision to bolt is considered a long shot, given that King World has gained station renewals for Oprah in 200-plus markets through 2000. By staying, Winfrey would earn herself another $270 million to $300 million. *—Michael Freeman*

Top Markets Choke Access

Little room for development and sales of first-run programming

TV SYNDICATION / By Michael Freeman

When it comes to selling 1998 talk show projects bragging the likes of Roseanne, Howie Mandel or Donny and Marie Osmond, TV station executives have no problem opening up daytime opportunities. But they can forget launching most any newsmagazine or game show project for the coveted prime access (7-8 p.m.) time periods.

And that's what separates daytime from prime access; it's either feast or famine. Thus, the words behind prime access will remain a misnomer as long as the ABC Television Stations group keeps renewing King World Productions' top-rated *Wheel of Fortune* and *Jeopardy!* game show strips beyond 2000, some station execs say. The same holds true for the CBS Television Stations as it strengthens ties to Paramount's *Entertainment Tonight* and *Hard Copy* magazines. Ditto at NBC, as it maintains active ownership positions in *Access Hollywood* and *Extra*.

Consequently, industry insiders say, there's little room for development and sales of first-run programming for access as the Big Three networks, as well as the Fox, Tribune and Chris-Craft/United Television station groups, continue to concentrate on acquiring brand-recognizable off-network sitcoms. Critics call it a near-lockout that particularly hurts TV station owners below the top 20 markets. "The biggest thing crippling program development is top-10 markets, particularly New York," complains one head of programming and acquisitions for a middle-market station group, requesting annonymity. "It's just really interesting that no one with the major station groups thinks there is any need to prop sagging ratings in access with something original. Sadly, nobody is going to step up because it comes down to the art of deal and how much of a piece they can own of a show. Giving viewers something they would like better has nothing to do with it."

Regardless of a show's content, syndication execs increasingly blame the Big Three network station groups with calling the shots on licensing terms, and thereby extracting other ownership rights. Critics also complain that even if ratings are declining for nearly every first-run strip in prime access (see chart), it is often more expedient to air a low-rated strip than pay the megabucks that the ABC Television Stations group forks out for King World's top-rated strips. As for the NBC O&O stations, they are sticking with the in-house produced *Access Hollywood* magazine, even though the show's 2.8 U.S. rating puts it at the bottom of the prime-access heap. While *Access Hollywood* eeks out respectable ratings for NBC O&Os in the top three markets, its mediocre national returns barely keep pace with prime-access stablemate, Warner Bros.' *Extra* magazine. NBC was able to extract a minority ownership position to keep access. However, according to a pair of New York rep sources, the NBC O&O group has quietly sent out word to the major studio-based syndicators to develop alternative series product should *AH* fall further in ratings.

One series touted as having a chance to break into prime access without having to give up ownership stakes is Worldvision Enterprises' *Pictionary* game show, debuting this month. Although about 60 percent of Pictionary's 158 market clearances (representing 98 percent U.S. coverage) come in daytime, Bob Raleigh, senior vice president of sales for Worldvision, estimated that the remaining 40 percent will be evenly spread out between prime access and early fringe (3-6 p.m.). "It's a hit-or-miss proposition, but we're confident that in success [with the ratings] we'll be able to get more time period upgrades into prime access after the [1997-98] season," said Raleigh. ■

OLD GUARD FALLS IN PRIME ACCESS
Household Season/Date Rating Averages

Program (Distributor)	'96-97	'95-96	'94-95	% chg from 1st season
Wheel of Fortune (King World)	11.3	12.4	13.4	-15%
Jeopardy! (King World)	9.3	10.2	11.1	-16%
Entertainment Tonight (Paramount)	6.0	6.8	7.7	-22%
Inside Edition (King World)	4.7	5.9	6.4	-26%
Hard Copy (Paramount)	4.0	5.0	5.8	-31%
Extra (Warner Bros.)	3.5	3.6	3.1	+13%
American Journal (King World)	3.1	3.7	4.2	-26%
A Current Affair (Twentieth)*	NA	3.5	5.1	-31%

Source: Nielsen Syndication Service reports from gross aggregate averages for household ratings; Sept. 2, 1996-Aug. 8, 1997 for this season; all others are full-season averages. Footnotes: *=canceled series; NA=not applicable.

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A Learning Curveball

"Sports Illustrated" team revises playbook for new kids TV show

TV PROGRAMMING / By Mike Reynolds

The Sports Illustrated for Kids Show is proving to be quite an educational experience— for the adults creating the show. Premiering Sept. 13 on CBS at 11 a.m. ET/PT in most markets, the 30-minute show, co-hosted by Rebecca Budig (Michelle Bauer on Black Rock soap *Guiding Light*) and Eugene Byrd (roles in the films *Sleepers* and *Dead Man*), showcases a quick-edited format that brings the magazine to life via facts, tips and athletes. Each episode also features a guest-athlete host, the first being Grant Hill of the Detroit Pistons.

To date, three episodes are in the can. Through August, SITV has shot segments with 140 athletes, including appearances by wakeboarding champs Parks and Shane Bonifay and U.S. Olympic soccer star Julie Foudy.

The show is making its play under the auspices of the federal Children's Television Act, adopted in July 1996, which requires stations to air three hours of educational programming per week. In transmogrifying the award-winning kids magazine to broadcast, the executives at Sports Illustrated Television, the programming arm of SI, and Eyemark Entertainment, the programming, distribution and marketing unit of CBS, have been keeping watchful eyes on the program so that it not only conforms to FCC educational guidelines, but doesn't tread on commercial elements inherent to sports today. "Kids see the success and the special skills these athletes have, but they don't realize what's involved to get there," said *SITV* president Ted Shaker. "We're trying to use sports as a metaphor for life, to instill the values of sportsmanship, teamwork, dedication, hard work and practice—all within the FCC's educational prerequisites."

Said CBS senior vp daytime/children's programs and special projects Lucy Johnson: "We're all on different learning curves. As adults, we might get something, but an 8- or 9-year-old might not. Our advisory boards are working to help ensure that the material is age-appropriate."

Dr. Gordon Berry, a professor of educational psychology at UCLA, heads that nine-member advisory panel, whose overriding goal, Johnson said, is to "make certain that whether it's the beginning, middle, or end of a segment or if it's a voice-over, footage or whatever creative element, that the educational message is coming across loud and clear."

"In both the magazine and the show," said *SI For Kids* publisher Cleary Simpson, "we're talking about stealth education, bringing out positive and pro-social aspects by humanizing the athletes. In print, this can be done more subtlety because the kids can make their own inferences. With the fast-paced nature of TV, you have to be more upfront with them...That's the challenge, that's the fun of it."

STEVE WEWERKA/THE SPORTS ILLUSTRATED FOR KIDS SHOW

Olympic gold medalist Dominique Moceanu (l.) and SITV co-host Rebecca Budig.

Maintaining that balance has also proven challenging for *SITV*. "We did a B-site shoot with Rebecca Budig about how Madison Square Garden is converted from a hockey to a basketball facility," said Shaker. "We thought we had a very interesting piece before realizing we didn't emphasize the teamwork aspect enough. So we re-shot it to place more emphasis on the educational lesson of working as a team."

In addition to Nike, Simpson lists Frito-Lay, Quaker and Hershey, all longtime sponsors in the magazine, as some of the companies that have bought time. Simpson said CBS sold most of the inventory during the upfront, but "we're talking about doing a couple of things together in scatter." Although the primary readers of the magazines range from ages 8-14, the show's viewers may skew younger. "We think there will be plenty of 6- and 7-year-olds; you don't have the reading (ability) issues," said Simpson. Some buyers, however, believe that many *SI for Kids* readers may be otherwise preoccupied. "A lot of them will be out there playing soccer, basketball or Little League," said one buyer. "The active ones won't be in the house to watch. ■

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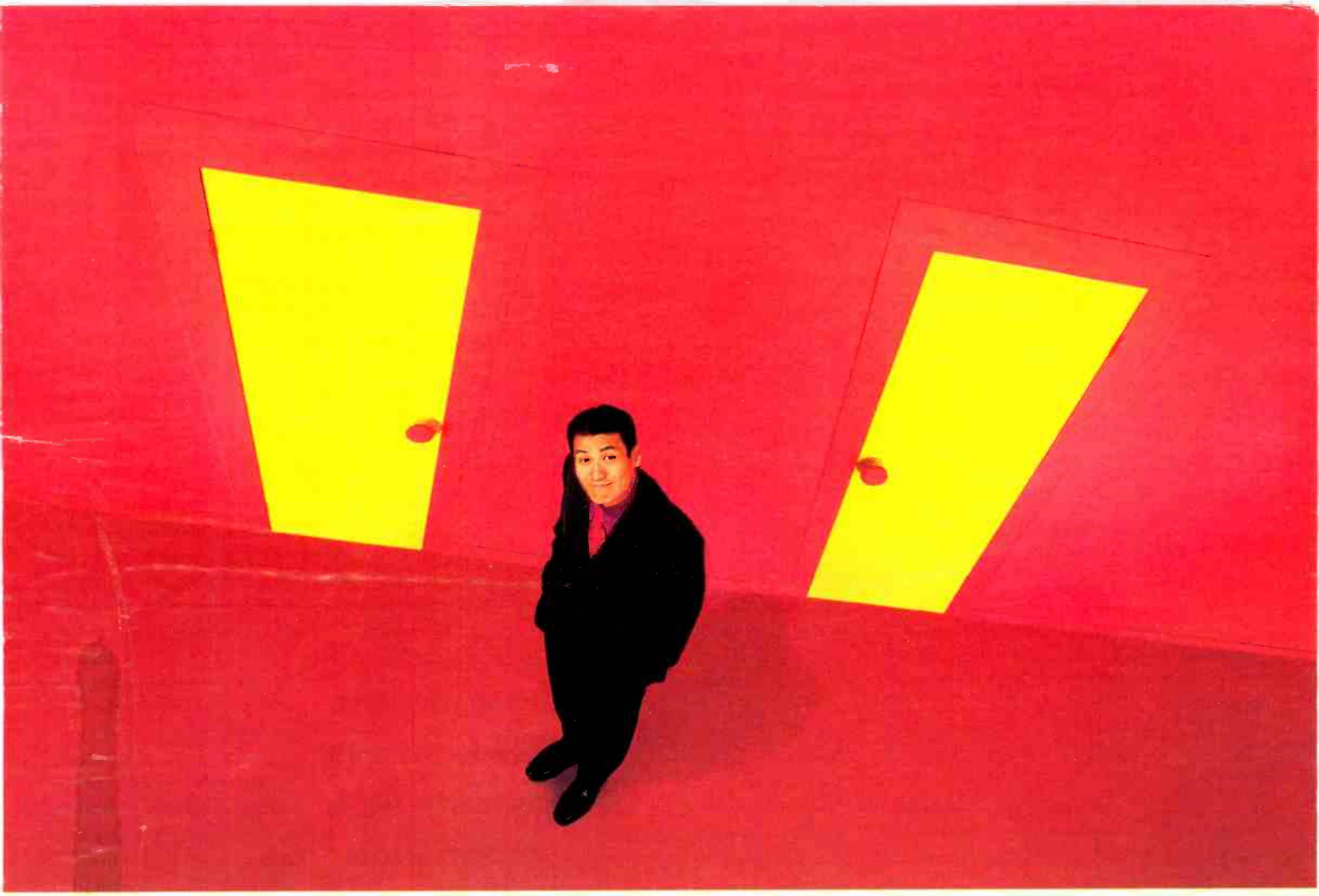

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TV SPORTS

By Langdon Brockinton

Gee, 'Em's a Lot of Title

At least three of the Super Bowl postgame's spots have been sold

General Motors will be the title sponsor of NBC's Super Bowl XXXII postgame show, industry sources said. Televising its second Super Bowl contest in three years, NBC is seeking about $600,000 per 30-second spot on the postgame program, sources added, noting that GM will air three postgame 30s. Depending on the length of the 1998 Super Bowl matchup, held Jan. 25 at San Diego's Qualcomm Stadium, the network's broadcast will likely run for 20-40 minutes.

Meanwhile, only a couple of in-game spots—both in the fourth quarter—remain unsold, media buyers said. On average, 30-second units have gone for about $1.3 million apiece, a $100,000 increase from the $1.2 million-per-spot price tag that Fox secured for the 1997 Super Bowl. While GM's Pontiac division snagged entitlement of Fox' Super Bowl XXXI postgame show, Ford Motor Co. was the title sponsor of NBC's Super Bowl XXX postgame edition.

Lasting 26 minutes, the Peacock network's SB XXX postgame broadcast scored a 35 ratings average. For its postgame show last January—which aired for 32 minutes—Fox delivered a 29.8 ratings average, while selling a number of those prime-time spots for about $600,000 apiece. NBC's '98 Super Bowl postgame inventory consists of a dozen 30-second units. Among advertisers buying time were Pepsi, which also has purchased several ingame spots, and Publishers Clearing House.

Few in-game spots remain for this year's mega event—both in the fourth quarter.

Boosting horse racing's meager presence on broadcast television is a vital goal of the recently formed National Thoroughbred Racing Association. Toward that end, the NTRA has hired Sports Marketing & Television International, whose charge is to try to develop much-needed TV exposure for the sport. "We want to regenerate the sport on broadcast television," said Mike Trager, chairman of SMTI, an arm of New York City—based Marquee Group. Trager, also a director of Marquee, is a principal force behind the NBC-televised Breeders' Cup, the richest single day in thoroughbred racing. Trager plans to meet this fall with the major broadcast networks, with UPN and the WB, and with cable networks that might have an interest in horse racing. (ESPN, of course, already televises a healthy menu of horse racing.) Will the networks be receptive? "If we can demonstrate real [rac-

ing] industry support [for the NTRA], with real dollars, we will have a convincing argument." he said. "I suspect we will meet with some success, but we're not naive enough to think it will happen overnight."

Created by a number of key horse owners, racetracks and influential racing organizations such as the Jockey Club and the Breeders' Cup Ltd., the NTRA is trying to restructure the sagging sport through a national body that would market and organize thoroughbred racing. Whether the NTRA can become a viable entity remains to be seen. Attempts are now under way to identify sufficient revenue sources—ranging from $20 million to $50 million annually— during the next four years to support the group's advertising, marketing and television plans.

To get horse racing on the broadcast airwaves—at least out of the gate—SMTI may have to purchase the programming time. (Indeed SMTI/Marquee itself is equipped to produce the shows and sell their commercial time.) The idea would be to buy half-hour or hour-long blocks of programming time on Saturday or Sunday afternoons. A couple of programming possibilities, Trager said, could include: Developing a summertime handicap racing series or, as another example, airing a number of events leading up to the Kentucky Derby in May. Another potential move is to nationally syndicate a feature-oriented "magazine" series.

"Aside from the Triple Crown [on ABC] and the Breeders' Cup, the sport is underexposed on broadcast television," noted Tim Smith, a managing partner of Atlanta-based International Sports and Entertainment Strategies, which is heavily involved in the NTRA's marketing efforts. (A quick clarification: In a recent TV Sports column, we reported that the annual fee for the title sponsorship to the Breeders' Cup was being priced in the "low six figures."Actually, that should have read "low seven figures.")

Commercial time for USA's telecast of the opening day (Friday Sept. 26) of the 1997 Ryder Cup is sold out. Alliance Capital and British Airways snagged the final sponsorship packages, said Bob Riordan, vp, New York sales, at USA, noting that they join Pepsi, Visa, Mass Mutual, SmithKline Pharmaceuticals, Caterpillar, GM's Oldsmobile division, Titleist Golf, Foot-Joy, Spalding golf balls, Top-Flite clubs, Acura, Union Camp, Texaco and Bloomberg Network on the advertising roster.

Although the following item does not involve television, we think it's important nonetheless because we believe that Reading Is Fundamental; thus we have renewed our subscription to TV Guide: *Sports Illustrated* plans to introduce a new editorial department called "Inside Motorsports" in its Oct. 6 issue. A four-page section devoted to auto racing, "Inside Motorsports" will appear at least 13 times in its inaugural year. Making its advertising return to SI , Valvoline is the first sponsor to commit to "Inside Motorsports." Initially, Valvoline is expected to tout its DuraBlend synthetic blend motor oil. And next spring, the company will use its SI commitment to help launch a new product line.

Local Media

KANSAS CITY • MONTEREY, CALIF.

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On KSHB, the Early News Gets Later

• SOMETIMES THE BEST WAY TO FINISH FIRST is to be the only one in the race. Scripps Howard's KSHB-TV in Kansas City will apply that maxim literally beginning Sept. 29, giving its struggling 5 and 6 p.m. newscasts the ax and reshuffling its early news schedule. The NBC affiliate will move *NBC Nightly News* up to 6 p.m. and offer local news at 6:30 p.m., in an effort to attract viewers who arrive home from work too late to watch the market's other local news reports.

"We could have held on for another two or three years," Jim Swinehart, KSHB vp and general manager, said of the current news schedule. "But we saw this as the opportunity to try local news at a unique time period. There are lots of women who tend to be news viewers but who are unavailable [between 5 and 6:30 p.m.] because of work schedules or family commitments."

KSHB's 5 and 6 p.m. newscasts have languished for the past two years with ratings in the low 1s and 2s, never commanding more than a 6 share in key demographics, according to Nielsen Media Research. The early news leader in Kansas City is Hearst's KMBC (ABC), followed by Meredith's KCTV (CBS), Fox O&O WDAF and KSHB.

Some of KSHB's news ratings problems can be traced to Fox Broadcasting's purchase of the New World Communications station group three years ago. New World's WDAF-TV in Kansas City, an NBC affiliate, switched over to Fox following that deal. KSHB, at the time a Fox affiliate, flipped over to NBC; the station, which did not program local news, had to build a news department in a hurry.

"[Viewers] develop relationships with their anchors. But [KSHB's] anchors were not familiar to the market" when the station launched local news in '94, noted Jodi Light, a media director at Light & Associates, a media-buying service in Kansas City.

"It's never easy being the fourth station [in a market] to do news," noted Bob Niles, senior vp for network development at NBC.

At 6:30, KSHB's new half-hour local newscast will take on the syndicated *Inside Edition* on KMBC, *Wheel of Fortune* on KCTV and *Entertainment Tonight* on WDAF.

While KSHB's rescheduling of its early news should attract viewers among professional types who work 9-to-5, Kansas City has many blue-collar and trade workers for whom the 6:30 newscast may not be convenient, buyers noted. General Motors, Ford Motor Co. and TWA all have major operations in Kansas City, with large numbers of off-hours shift workers.

Carolyn Dolginoff, a broadcast supervisor at Valentine Radford, a Kansas City media buying service, notes that while the shift is "probably a smart one" for bottom-ranked KSHB, the station is cutting itself off from early news viewers who are home at 5 p.m. "It may not help them that much," Dolginoff said.

Media buyers also noted that KSHB's new 5 p.m. lead-in to *NBC Nightly News* at 6 is the syndicated *Rosie O'Donnell Show*, which in its current 4–5 p.m. slot has not drawn viewers to the station's local newscasts. KSHB's Swinehart believes that since the new 6:30 local news will try to attract many viewers who are not even home at 5 p.m., "flow may not be so

MEDIA PROFILE: KANSAS CITY

How Kansas City adult consumers compare to those in the country's top 59 markets

	Top 59 Markets %	Kansas City Market %	Kansas City Market Index (100=average)
MEDIA USAGE			
Any Daily Newspaper	58.8	55.1	94
Any Sunday Newspaper	68.4	64.9	95
Radio Morning Drive	25.4	17.8	70
Radio Evening Drive	18.1	24.3	134
Watched A&E past 30 days	40.6	39.0	96
Watched Nickelodeon past 30 days	26.9	25.4	94
Watched ESPN past 30 days	38.8	43.8	113
Watched MTV past 30 days	23.4	20.0	85
Watched TNN past 30 days	25.6	31.0	121
Watched USA past 30 days	45.8	51.6	113
DEMOGRAPHICS			
Age 18-34	33.9	33.4	99
Age 35-54	38.8	39.2	101
Age 55+	27.2	27.4	101
HOME TECHNOLOGY			
Connected to Cable	75.7	75.0	99
Connected to Satellite/Microwave	3.9	5.2	133
Subscribes to Basic Cable Only	37.8	35.3	93
Subscribes to Basic Cable Plus Pay Channel	38.0	39.7	104

Source: 1996 Scarborough Research—Top 59 Market Report

#1 FOX KIDS IS #1 AGAIN

FOX KIDS network™

Season-to-date Saturday Morning Ratings

		K 2-11	K 6-11	P 6-17
#1	FOX KIDS NETWORK	4.5	5.0	3.8
#2	NICKELODEON	4.3	4.5	2.6
#3	ABC	2.7	2.5	1.9
#4	CBS	1.4	1.4	1.0
#5	KIDS' WB	1.6	1.5	1.2
#6	CARTOON NETWORK	0.9	0.7	0.4

Fox Kids Rocks Kids™

Source: Nielsen 9/7/96–8/23/97, Sat. 8a–12n. FCN Logo: ™ & © FOX.

Media Outlook '98

ADWEEK MAGAZINES
September 8, 1997

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prosperity

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markets

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erosion

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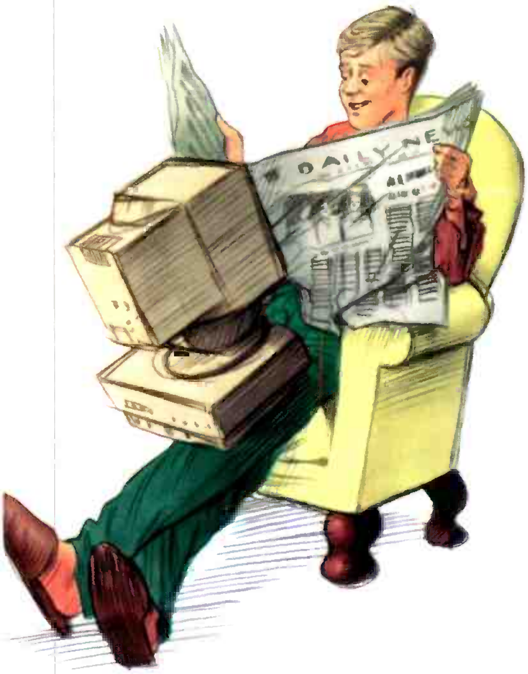

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COVER ILLUSTRATION BY AARON THOMAS ROTH

Wall Street and Madison Avenue are in Goldilock-step

THE Good Times are Now

By Alan Gottesman


ILLUSTRATION BY AARON THOMAS ROTH

There are three widely cited advertising-industry prognosticators: Veronis, Suhler & Associates; Zenith Media; and McCann-Erickson's Bob Coen. They do not always agree on everything, but they do agree on one thing: All expect this year's better-than-GDP growth to persist into 1998.

There are a large number of executives whose companies' fate, presumably, hinges on advertising's performance in the months ahead. And, not surprisingly, many of them enjoy sharing their views about the industry's outlook. However, at least at the larger agencies—those with revenues of $500 million or more—the focus is far broader than just the U.S. ad industry, and the talk quickly shifts to the global marketing services business.

The major agencies and holding companies—those who service larger, blue-chip clients—are all global in scope. In fact, some shops generate more revenue and profits outside America's boundaries than from within. Then, of course, there is a lot more to the agency game these days than just advertising. That is true both on Madison Avenue and around the world. The health of the U.S. advertising business will always matter, but it is clearly not as important as it was 10 years ago.

Perhaps the U.S. economy, which has been expanding since 1991, is due for what economists and Wall Street analysts refer to as a "correction." However, the early-warning signs of economic excess, such as a buildup in inventories, lengthening of industrial-delivery responses, excessive consumer and industrial debt, or a plunge in consumer confidence—not to mention inflation—are nowhere in sight.

Thus, if the economy is about to tank, the potential cause is not apparent. And, unless we see signs soon, we will be far enough into 1998 to ensure that it, too, will be a year of continued economic expansion.

There is no doubt a link between the health of the overall economy and the well-being of the ad industry, but the U.S. agency business has been remarkably resilient nonetheless. Its dip in 1991 was only the second in the post-World War II era. That is a much better record than the economy as a whole, which has suffered a number of recessions during that same period. Still, even though the ad industry's globalization might help immunize it from disaster if the U.S. economy stalls, ad agencies remain vulnerable to some degree to the economies elsewhere on the planet.

Global diversification—or exposure to alien economies—is, right now, one of the more attractive aspects of the business. Whether the U.S. ad industry expands by 8.4 percent (per Veronis, Suhler) or 4.8 percent (Zenith) in 1998, it won't knock anyone's socks off; the industry is relatively mature. Agencies today must be international players to sustain growth in excess of 10 percent.

Fortunately, industry executives are finding quite a bit of action in developing markets. Asia is the largest region after North America and Europe, and is likely to be the fastest-growing emerging market. Expansion rates in Latin American countries are forecast to be at least twice those of the U.S. market. And the potential for expansion in Eastern Europe, notably Russia, Hungary and Poland, is extremely promising, too. The ability to compete for assignments from local advertisers, in addition to handling work for multinational companies, makes these emerging markets doubly attractive.

Just because the U.S. ad business is considered a mature industry does not mean it is a stagnant one. In fact, there are two developments that will stimulate domestic ad growth—if not set it on fire—at least through 1998.

First, there has been a significant shift in the pecking order among advertiser categories. While the U.S. market as a whole may be growing slower than in the past, several client industries are behaving more like emerging markets. Telecommunications, for example, is one domestic industry with bright growth potential. Some phone companies are making the transition from regulated utility status with monopoly standing to competitors trying to protect their core businesses and expand at the expense of new rivals. Senior telecommunications managers have little experience as marketers, and the tendency so far has been to overspend on advertising. Home entertainment companies, computer makers and movie studios have also behaved like tipsy sailors when it comes to setting ad budgets.

> While the U.S. market as a whole may be growing slower than in the past, several client industries are behaving more like emerging markets.

As these cases illustrate, the arrival of an entirely new class of clients can rouse the ad business. Indeed, we're starting to see yet another potentially lucrative category emerge—prescription-drug advertising aimed not just at doctors but at a broad base of consumers. The stakes are high because a large number of pharmaceutical drugs will lose their patent protection over the next few years. Their manufacturers will need to expand the marketing pressure against generic versions that are sure to hit the market.

The other big development is a consequence of the proliferation of media. The list of available media has been growing at an amazing pace, and the arrival of digital cable and broadcasting will trigger even greater proliferation. If it isn't axiomatic already, it ought to be a law of logic: No matter how long the list of choices, there can only be one best choice.

The increasing number of options are placing advertisers at ever-greater risk of misjudging their market with a suboptimal media plan. Agencies, especially the larger ones, see an opportunity here. Their media-related functions have become points of competitive difference. (It helps explain the relatively high level of capital expenditures by some of the larger shops on computers and other technologies.)

In any event, the explosive growth of media has been a net plus for the ad business because it gives a prepared agency a chance to provide superior service. If the media independents take root in the United States to the degree they have in Europe, there may be problems for the conventional agencies if large clients start buying traditional agency services à la carte. That, however, is a worry for another year.

In fact, clients seem to be rushing toward their agencies

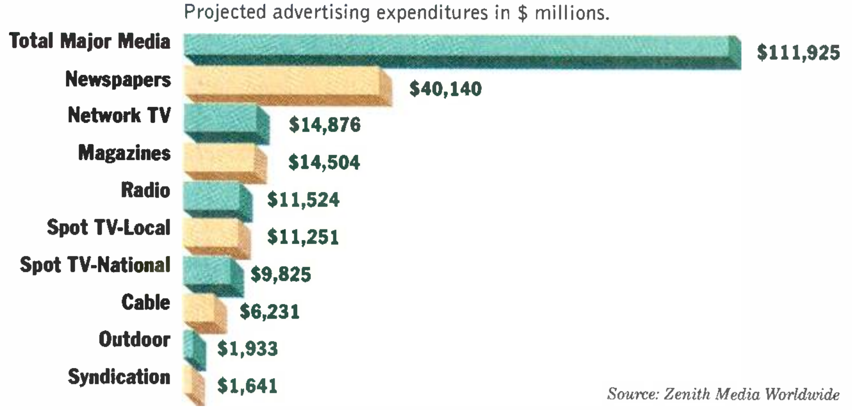
Economic Overview

these days rather than away from them, all in the name of efficiency. Even the non-trade press made a big fuss about Citicorp's recent account consolidation with Young & Rubicam, noting that a number of large advertisers have trimmed their agency rosters down to a handful of names. The trend toward roster consolidation has far from run its course.

Technology allows a degree of multioffice coordination not possible until recently. The major multinational ad agencies also are adopting electronic communications technology with vigor—another push to the capital spending surge. Supporting companies, such as teleconference producers, are enjoying the boom, too. Consolidation has always promised a greater degree of control and coordination, but until about five years ago this was expensive, impractical and not especially reliable. Indeed, the greatest value of the Internet to advertising has been in the technological resource sense, not as a bright new medium.

What's ahead for 1998?

Projected advertising expenditures in $ millions.



Source: Zenith Media Worldwide

Technology has been driving the consolidation trend but is not the basic cause. That honor goes to the general rationalization of industry to do more with less. Call it downsizing, reengineering, or cook up a whole new buzzword. Companies have gotten slimmer, much to the benefit of their margins.

Cost savings can bolster profits, but only up to a point. Eventually, a business needs to sell more cars, more computers or more hamburgers in order to grow. As a result, we've seen a greater reliance on brand-oriented marketing to foster top-line growth. Even the sales promoters are shifting away from a price-break orientation—coupon issuance appears to be abating—and moving into brand-augmenting activities such as cobranding and event sponsorship.

The swing between advertising and the "below-the-line" techniques is interesting to watch but, increasingly for a business analyst, only in an academic sense. Most of the major "advertising" companies are also major public relations, promotion, identity and "other" companies as well. Profit margins in some of the specialty disciplines, such as recruitment, healthcare and yellow-pages advertising, can be double those of conventional ad work. And these areas are growing faster than "real" advertising to boot.

The twin blades of roster consolidation and globalization may stir growth on this side of the business, as techniques that have been perfected in the mature U.S. market are adapted for use around the world and become more integrated into advertisers' global marketing plans.

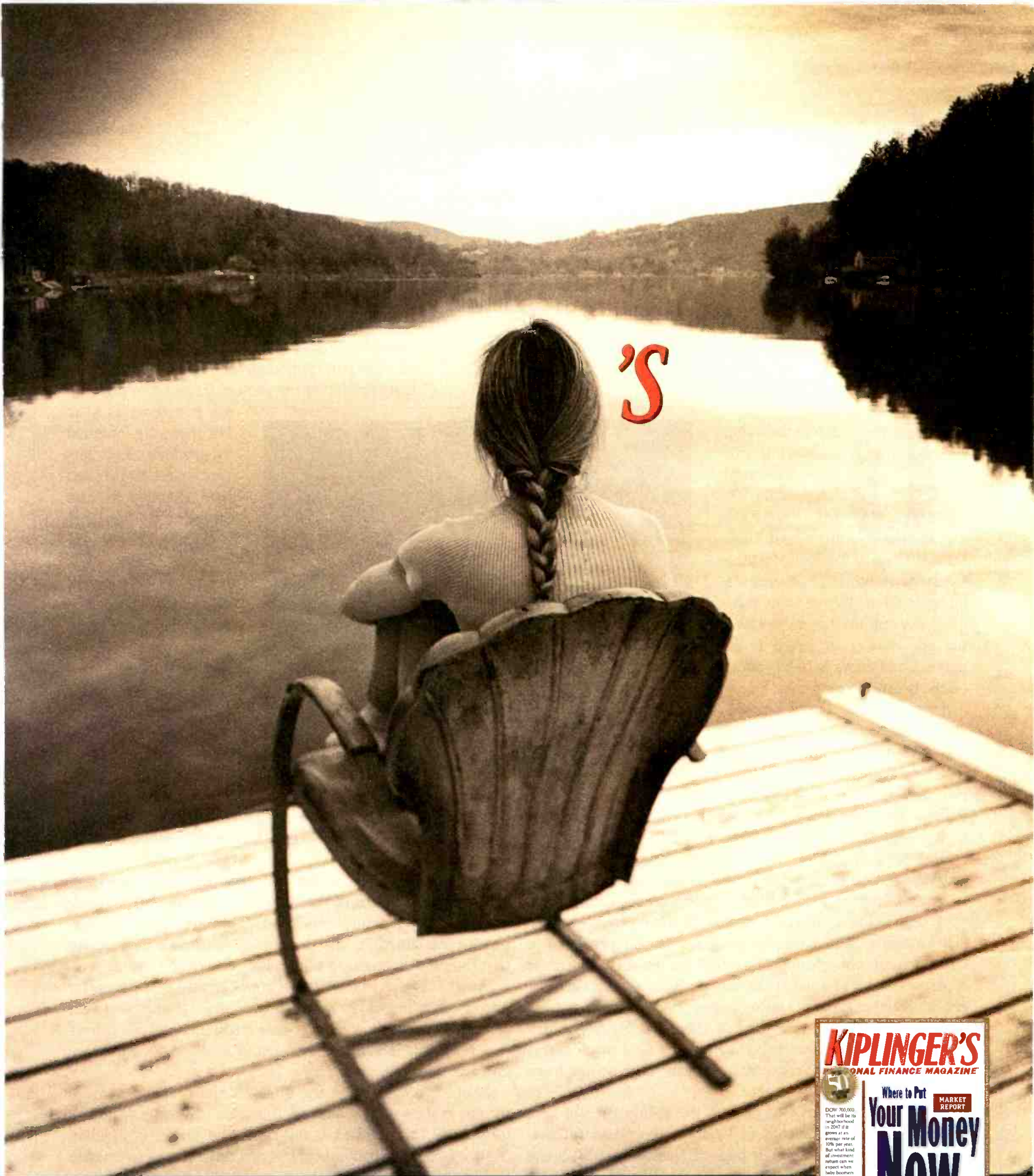
There has also been a significant degree of consolidation within the agency business. (Just ask the pizza-delivery guys who work near the industry's leading law firms.) The largest of the ad shops, taken as a group, have been increasing their share of the industry's volume through mergers and acquisitions. Major firms are buying allied outfits, such as Omnicom's acquisition of public-relations giant Fleishman-Hillard; some nonconventional operations, like CKS Group, are trying to integrate into the mainstream, as evidenced by its purchase of ad agency McKinney & Silver.

We might be witnessing the industry's evolution into a two-tier structure, with a dozen or so global mega-players and an infinite number of specialty shops, wannabes and also-rans. Big clients are global and technologically sophisticated, and agencies need to keep up. (The agencies that can't either lose the business or get acquired.) The ones that stay in the major leagues operate in an arena of opportunity and relatively limited competition. They have a facility advantage in that they are able to service accounts on a worldwide basis. We are far more likely to see new global clients arise—who need that level of attention—than new agencies that can provide it.

There are basically three ways for an agency to go global. One is to acquire units with the right geographic spread, although a survey of most regions shows there may not be a lot to buy. Another is to ride the coattails of a client's worldwide expansion, which begs the question of how an agency could win and retain such an account without having a global network already in place. And then there is the start-up route, which requires lots of money, lots of time and no small degree of luck.

The barriers to competitive entry and the trade practice that limits an agency's ability to work for clients (who themselves compete with each other) guarantees that there will be a number—albeit a small number—of big shops to handle the work.

A salubrious economic background, more ad-friendly behavior on the part of clients, consolidation of accounts among roster agencies, globalization, the growing importance of technology and media analysis are major factors underlying the industry's likely performance in 1998. And the outlook, clearly, remains bright. ■


'S
KIPLINGER'S
Where to Put
MARKET REPORT
Your Money Now
▶ Best bets for the year ahead in stocks, bonds and real estate
▶ What's in store for the economy
▶ Home-price forecasts for 100 cities

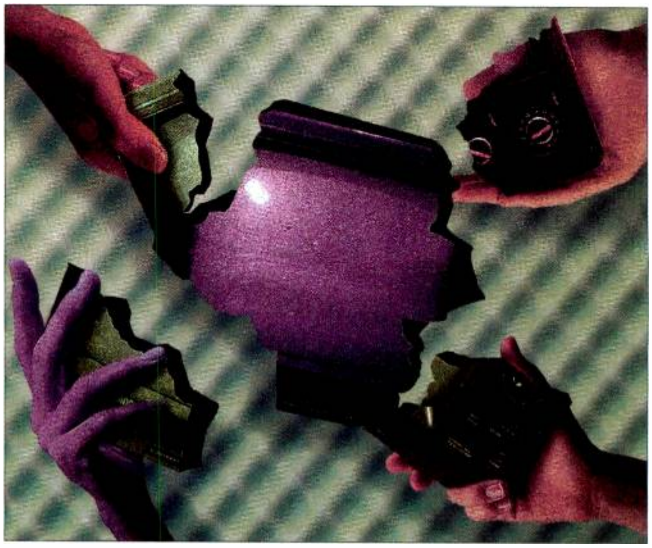
Network TV

Eroding, but not going away

BY RICHARD KATZ

'98 SPENDING FORECAST:
VERONIS +7.4%
ZENITH +5.0%
'97 SPENDING a/o 5/31: $6.3 bil*
'96 SPENDING: $14.7 bil*

*Source: Competitive Media Reporting



Despite declining audience shares and increased competition from cable, the broadcast network business will remain healthy for the near future. The reason: In an age when TV viewers have dozens of options, the easiest way for advertisers to reach large national audiences is to buy spots on the broadcast networks.

Critics of the broadcast networks refer to ABC, NBC, CBS and even Fox as dinosaurs that will become extinct due to the rise of cable and other viewing options. This summer, total basic cable ratings were slightly higher than ABC, CBS and NBC combined.

However, even though broadcast network viewership erosion can't be denied, the networks are still the only way to reach 10 million to 20 million people with one commercial. "I've seen articles about the decline of the networks for the last 12 years," says Gene Jankowski, a former president of CBS and currently a managing director at Veronis, Suhler & Associates. "The networks are the only trump card for reaching 100 percent of the audience."

Adds Neil Braun, president of the NBC Network, "It's the economic law of scarcity. The harder it is to reach everybody, the medium that can reach everyone is finite and more valuable."

Advertisers certainly agree with this sentiment and have proved it with their spending. In June, the broadcast networks (including the Big Four plus UPN and The WB) broke the record for upfront sales, topping $6 billion for the first time. And Veronis, Suhler projects a 4.9 percent compound annual rate of growth in ad spending for the networks over the 1996–2001 period. Veronis estimates that ad revenue will grow from $13.7 billion in 1996 to $17.3 billion in 2001.

Media buyers predict that, like this year's scatter market, next year's scatter will remain strong. If the economy remains robust, buyers say CPMs will increase anywhere from 10 to 25 percent. The increases will be on the higher end of the range if network shares continue to erode because inventory will tighten due to more makegoods.

Despite cable stealing viewers from broadcast television, Zenith Media also believes network ad sales will continue to be robust. Zenith originally predicted the sector's revenue to grow by 4.5 percent this year but recently bumped its estimate to a 7 percent increase. It based its revision on the strength of the current scatter marketplace which "has proved to be remarkably robust despite well-documented audience erosion."

Fourth-quarter scatter is selling at CPMs 25 percent above upfront prices, which were already at all-time highs, notes Joe Abruzzese, president of sales for CBS. As of the last week of August, CBS had already booked more than $25 million in prime-time scatter.

A potential problem for the network sales business, according to Zenith, is the networks' practice of jamming more and more commercials into their programming. Advertisers complain that this practice creates so much clutter that their clients' messages have less impact on viewers.

Another obstacle for the networks could be the recently introduced ratings system which warns viewers about violent or sexually explicit content. Some ad-agency buyers believe that programs labeled for extreme violence or sex will scare away certain sponsors.

"Nobody knows what the effect of the program content ratings system will be because they won't come out with full force until this fall," says one media buyer. "The reaction from consumer groups could cause advertisers to change their in-house guidelines."

Despite potential roadblocks, bullish sentiment remains intact. "Until the economy stalls, there is an excess demand for television," says Gene DeWitt, president of media-buying firm DeWitt Media. "That will continue to drive solid pricing. Until cable can consistently get high numbers, the broadcasters don't have too much to worry about."

ILLUSTRATION BY AMY GOLDBERG

Our (10,000 Cat Giveaway) Concept!

Dear Media Person – Act now!!

Our espn2 client wanted an ad to say they're now in *50 million
So we came up with the "10,000-Cat-Giveaway." That's right, we want to
people like you. That way, every time your cat is hungry, or needs its
espn client couldn't handle the bigness of "The Giveaway" and wanted
and tell him which idea you like better?

(their ad)

r

households. And what do households have?! Cats!! That's what they have!
give away 10,000 Siamese, Calico and Burmese shorthairs to media
litter box changed, you'll be reminded of how cool espn2 is. But our
to do their ad instead. So can you call Evan Sternschein at 212-916-9848

*ESPN research derived Nielsen Universe estimate
50,210,000 - week ending 8/10/97 (lawyers)

(Please tell them this highlighting thing is totally overkill.)

Network TV continued

Because of today's seller's market, DeWitt says that advertisers without sizable budgets at their disposals will suffer. "The huge budgets will have access to the big sponsorships like the Super Bowl and Thursday night on NBC," says DeWitt. "The guys who don't [have big budgets] will have to do without spots in the higher-rated stuff. People will find that $50 million to $60 million is not a lot of bucks anymore."

The strong U.S. economy has driven demand for broadcast network time through the roof. Car manufacturers are launching more new models and need to buy ads on the networks, says Jon Nesvig, president of sales for Fox. The same holds true for financial services companies and high-tech firms, he adds. While the fast-food companies' businesses are not growing significantly, the increased competition in the sector has meant increased ad spending. Also, a loosening of the restrictions for prescription-drug ads should result in hundreds of millions of dollars flowing toward the broadcast networks. "There should be plenty of money to go around," sums up CBS' Abruzzese.

The networks "remain robust despite well-documented signs of erosion."

—ZENITH MEDIA

However, if the economy does go south, the networks' advantage of universal audience reach does not guarantee continued revenue growth. "It's a safety net but not a strategy," says NBC's Braun of the networks' superior distribution system.

In recent years, the four broadcast networks have adopted unique strategies rather than simply being the broad-based entertainment vehicles of the past. Braun says NBC is "trying to brand ourselves as the true broadcasting mass medium that transcends fragmentation." The network has the advantage of using its "tentpole" programming—such as *Seinfeld*, *ER* and the Olympics—to attract large audiences and steer them into new shows. "It's going to be harder than ever to introduce the next round of programming," says Braun.

Both media buyers and NBC's network competitors believe that NBC will remain the No. 1–rated network next year. Buyers point out that NBC is gambling a bit by scheduling so many female-skewed sitcoms on Monday night. "Will NBC be successful with 'Must-She TV'?" asked one media buyer, who spoke on the condition of anonymity. Stay tuned to find out.

ABC, which is trying to brand itself as the family network, has suffered the largest audience erosion of the Big Four, and 1998 will be a telling year for the Walt Disney Co.-owned network. Will ABC stem its viewership losses or continue its downward spiral? "ABC won't do well," offers DeWitt. "Fox's [young] audience duplicates ABC's quite a bit. Fox is siphoning audience away from them."

While ABC's schedule—which features the return of *The Wonderful World of Disney* on Sunday night—is moving toward a family strategy, some industry observers believe its new promotional campaign conflicts with this branding because the campaign revolves around irreverent, sarcastic slogans. "They're sending out some confusing messages," says Fox's Nesvig.

ABC also angered Southern Baptists by turning *Ellen* into a show about a gay character. The huge religious organization has advocated a boycott of all things Disney, but it is unknown if the boycott will have any negative effect on ABC. The network's new fall show *Nothing Sacred*, a drama about a rebellious young priest, has angered several large Catholic groups. It's too early to predict how this situation will turn out.

Contrarian Jankowski says that ABC's new schedule has more strength than it's given credit for. He adds that if ABC gets a break or two—such as good performance from its *Monday Night Football*—the network's fortunes could turn around. "Exciting games," he says, "could boost ABC's schedule."

Unlike ABC, industry insiders agreed that CBS has positive momentum going into this season. Abruzzese concedes that the network needs to attract more younger viewers—CBS' average viewer is 49—but says the network is in a good position to grow its total audience. "We can be a real strong No. 2," says Abruzzese. Buyers praised CBS' fall schedule and its architect, network entertainment president Les Moonves, whose responsibilities were recently expanded to make him the de facto CBS president.

As for Fox, buyers predict that the Rupert Murdoch–owned network will maintain its grip on the young audiences advertisers crave most. "Fox could do particularly well this year," says DeWitt. "They've done a good job of branding."

Weblets UPN and The WB should gradually grow, say TV observers, but their limited distribution systems will continue to make it difficult to garner ratings competitive with the Big Four. "They have the problem of getting sampling," says NBC's Braun, who nonetheless acknowledges that "they have hurt us more than any single cable channel. … It's hard to launch a new show with a 6 share," he adds.

Even though UPN has generally beat The WB in ratings, media buyers say The WB now has a better competitive position over its rival. It recently poached five Sinclair Broadcasting affiliates in midsize to large markets from UPN, a deal that left both weblets with equal distribution power. In addition, buyers prefer The WB's programming strategy. "WB wants to be a family network and has a clear idea how to get there," says DeWitt. "UPN is a little at sea." ■

Spot TV

Drug ads are a shot in the arm

BY CLAUDE BRODESSER

'98 SPENDING FORECAST:
VERONIS +7.1%
ZENITH +6.3%
'97 SPENDING a/o 5/31: $5.4 bil*
'96 SPENDING: $14 bil*

*Source: Competitive Media Reporting

Spot television advertising may find itself getting a powerful rush from an imminent infusion of drug money, among other new and developing categories in 1998. In August, the Food and Drug Administration's surprise decision to allow prescription-drug advertisements on-air without verbose descriptions about side effects made it clear that hundreds of millions of dollars in advertising revenue were at stake. It could not have come at a better time for broadcasters.

Some TV station executives say that while local and national spot dollars should be up overall, they are expecting automotive spot advertising to be down in 1998. "We think [automotive spending] will be down, maybe by as much as 10 percent," says Paul Quinn, vice president and general manager for Pulitzer-owned NBC affiliate WGAL in Harrisburg/Lancaster, Pa. Automakers, the predominant client of spot television, are starting to worry about an international glut of cars that could adversely impact the U.S. market.

"I am looking at pharmaceutical as a replacement for the automotive [category] for exactly those fears," says Victor Miller, an equity analyst at Bear Stearns in New York, adding that "it should bring in $1 billion in incremental business."

Media buyers are predicting single-digit cost-per-thousand increases. "I think we should be seeing CPM increases in the 3 to 5 percent range," says Liz Bratman, senior vice president at New York-based Creative Media.

Laura Silton, senior vice president/director of local broadcast at McCann-Erickson Worldwide, says CPMs will increase "around 4 percent." Still another media buyer predicts CPM gains of 6 percent, but requested anonymity, fearing backlash from clients and stations.

Many TV executives take comfort in the anticipated spike in pharmaceutical ad spending. Other newly deregulated industries, such as telecommunications and utilities, are also expected to boost their advertising budgets. "Ohio, Delaware, Pennsylvania and Maryland will all see electrical-power companies enter [spot advertising] soon. Long-distance service wars are also brewing," says Quinn. "These are all wars that will be fought on TV."

Barry Baker, president of Baltimore-based Sinclair Broadcasting, agrees that "pharmaceutical could become a whole new category." He believes spot TV growth rates should hover between 5 and 7 percent for national spot and 6 and 8 percent for local spot. Some TV analysts, including Melissa Cook of Prudential Securities, are forecasting less robust gains. "We could see a 3 to 4 percent increase in national spot and a 5 to 6 percent increase in local spending," Cook says.

Additionally, 1998 should provide "an even flow" of growth from both political advertising (election year) and Winter Olympic dollars, according to Television Bureau of Advertising president Ave Butensky. He says that much of 1998's political spending will come from non-candidate, issue-based advertising. "In 1996, political spending reached $390 million; $75 million of that was from issues advertising. We should see similar numbers [in 1998]," says Butensky.

Still, some media buyers and station group executives remain skeptical of any great benefit from an Olympic year. "Often you see the reverse happening. I think it softens up the quarter around it," says Rick Glosman, a partner at New York–based SFM Media, referring to the tendency of advertisers to concentrate their ad buys solely on the Games.

The most creative idea in spot advertising this year—the anti-spot—may well catch on in other markets in 1998. Tired of being handed its head in late news every Thursday night as a result of NBC's prime-time juggernaut lead-in, executives at WRTV, McGraw-Hill's Indianapolis ABC affiliate, decided to try something different: commercial-free, single-sponsor news. "We doubled our share in two of the three nights we tried it," says Marc Dunlap, general sales manager at WRTV. "It also drove up the price of our other avails in news." Dunlap declined to say if WRTV made money on the venture.

"It's an interesting idea," says SFM's Glosman. "We'll see more of it if it improves the stations' revenues." ■

ILLUSTRATION BY MATT COLLINS


Bobbi Brown
Bobbi Brown Professional Cosmetics.
40. Married, 2 sons.
Grew up on Chicago's North Shore. Raided mother's cosmetic drawer at 5; painted self, walls and sink. Earned degree in theatrical makeup, 1977. Brought natural look to high-gloss fashion industry. Opportunity: Couldn't find lipsticks natural enough. Created her own.
"I made them for myself, but models began asking where to get them."
Put up $10,000 with partner to form Bobbi Brown Essentials: 10 lipsticks, nude to neutral. Started with accessory table at Bergdorf Goodman. Grew into leading cosmetics line in 5 years. Acquired by Estée Lauder, 1995. Wrote best-seller: *Bobbi Brown Beauty*. Unfazed by fame.
"My idea of a good time is being in my kitchen in big socks making soup."
Estimated 1996 sales: $40 million.
Picked up her first copy of Forbes at cover shoot in 1986.
Forbes
CAPITALIST TOOL
www.forbes.com

Syndication

Talk shows don't come cheaply

BY MICHAEL FREEMAN

'98 SPENDING FORECAST:	
VERONIS +4.3%	
ZENITH +4.0%	
'97 SPENDING a/o 5/31:	$990 mil*
'96 SPENDING:	$2.3 bil*

*Source: Competitive Media Reporting

Erosion, erosion, erosion . . . that is all television executives talk about these days. While network and local broadcasters are losing sleep over whether more viewers are changing channels to the myriad cable networks or switching on home computers, syndicators are somewhat more stoic about the steadily evolving TV universe.

The fact is syndicators are sporadically able to turn a desert into an oasis when it comes to niche programming opportunities. The most recent evidence comes in the form of Buena Vista Television's *The Keenen Ivory Wayans Show* and Columbia TriStar's *Vibe*, new talk shows building beachheads in late night. And in daytime, Warner Bros.' hit, *The Rosie O'Donnell Show*, has spawned a handful of new feel-good talk shows being paraded out for the upcoming season.

"As much as *Keenen* may have taken some younger demos from CBS' *The Late Show with David Letterman*, most of our new ratings are coming from the 'other' category—cable," notes Mike Shaw, executive vice president of advertiser sales for Buena Vista.

By launching in August, *Keenen* and *Vibe* were able to establish strong early sampling among younger viewers, which also provided the impetus for Buena Vista and ColTriStar to make fairly aggressive rating and CPM projections. According to New York media-buyer estimates, both shows earned $15,000 to $20,000 per 30-second commercial. That means each show has the potential of earning $50 million in gross barter ad revenue, buyers suggest.

"*Keenen* and *Vibe* have effectively recaptured ground previously held by Arsenio Hall as well as doubling the revenue of what syndication had been earning in late night," says Tim Duncan, executive director of the Advertiser Syndicated Television Association.

In daytime, the success of *The Rosie O'Donnell Show* has fueled a resurgence of the once-embattled talk-show trade. When the dust finally settled on last April's upfront, daytime syndicated series brought in $290 million for the 1997–98 season, up a robust 22 percent over the previous season.

As for prime access, the most lucrative daypart in syndication, earnings are expected to increase only slightly. With the 6–8 p.m. access block valued at just over $500 million in ad revenue, there has been little upward movement due to the high number of solidly entrenched strips. Dating back to the mid-1980s, King World's *Wheel of Fortune* and *Jeopardy!* have remained atop the syndication ratings and now lay claim to station time periods well into 2001.

Indie distributor Worldvision Enterprises, owned by Spelling Entertainment, is one of a small group of syndicators trying to break into access with some outside-owned programming. Starting this month, it has launched its board-game-based *Pictionary* strip in 158 markets, representing 92 percent U.S. broadcast coverage. Although a bulk of *Pictionary*'s station clearances come in daytime, Bob Raleigh, senior vice president of sales for Worldvision, estimates that 40 percent of its U.S. coverage is evenly split between the early-fringe and prime-access dayparts.

On the weekends, the off-network rollouts of *The X-Files* and *NYPD Blue* will likely offer a rare opportunity for station programmers and syndicator Twentieth Television. Contrary to a 10-year trend in which dramas have opted solely for cable network runs, *The X-Files* and *NYPD Blue* are also simultaneously entering syndication with a bounty of early-fringe, prime-access, prime-time and late-fringe weekend clearances from stations.

Although some buyers suggest that Twentieth is projecting a 10-plus rating for *The X-Files*' double-runs in syndication, Dave Barrington, vice president of advertiser sales for Twentieth, declined comment on the studio's exact projections.

"Certainly, if [*The X-Files*] is doing a 23 or 24 share on the network," says Barrington, "we fully expect that its double-runs will do cumulative numbers comparable or better than [Paramount's] *Star Trek: The Next Generation* did previously in syndication." ■

ILLUSTRATION BY MATT COLLINS

Cable TV

New investor opens them pearly Gates

BY MICHAEL BÜRGI

'98 SPENDING FORECAST:
VERONIS +17.0%
ZENITH +15.0%
'97 SPENDING a/o 5/31: $2.3 bil*
'96 SPENDING: $4.7 bil*

*Source: Competitive Media Reporting

Two major events occurred this year that restored faith in the cable industry. One was the collapse of a potentially huge competitor that was backed by Rupert Murdoch. The other was Bill Gates' investment of $1 billion in a top cable operator, rekindling Wall Street's interest in cable in the process. These two disparate events have made Murdoch, the ultraconservative head of News Corp., and Gates, the much-feared father of Microsoft, unlikely poster boys for the cable industry.

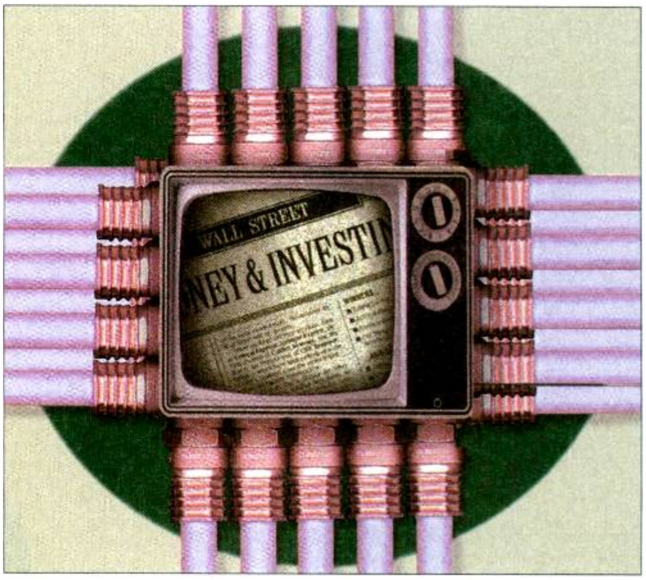


ILLUSTRATION BY AMY GOLDBERG

It was Murdoch's inability to pull together American Sky Broadcasting, the much-vaunted satellite venture nicknamed Deathstar, that caused cable executives to breathe a collective sigh of relief last April. Unlike other direct broadcast satellite players, ASkyB, a joint venture between News Corp. and EchoStar Communications, planned to offer a spate of local broadcast stations as part of its service. But the deal fell apart last spring when Murdoch got cold feet about costs and insurmountable regulatory hurdles. Since then, he has become a no-vote minority partner in Primestar, a rival satellite service owned by a consortium of top cable operators.

As if the capitulation of a would-be competitor weren't enough for the cable industry, just two months ago Bill Gates decided to drop a cool $1 billion—pocket change for him—to buy an 11 percent stake in Philadelphia-based Comcast, the country's fourth-largest cable operator. That news sent the stocks of major cable operators soaring again and convinced many mediawatchers that the cable industry remains the preeminent deliverer of new products and services, despite failing to deliver on its past promises (anyone remember 500 channels?).

"The driving factor [behind the optimism] was Murdoch's move into the cable arena [and away from ASkyB]," says Marvin Shapiro, a managing director with Veronis, Suhler & Associates. "But Gates' move was a tremendous vote of confidence in the cable industry, and he picked the right company to invest in. [Comcast] has strong management."

Surging cable stocks may benefit the industry as a whole. But the programming side of the cable business—the more than 50 viable cable networks fighting for a share of television's $20-billion advertising pie—ebbs and flows as a result of completely different forces. Though there has been more flow than ebb, sales executives at some of the major cable networks remain frustrated at their inability to push their ad rates up more than single-digit percentages.

It's a problem the broadcast networks wish they had. Though their collective cost-per-thousand increases rose in the double digits during this spring's upfront, the overall revenue increase was much smaller. Those CPM increases were making up for ratings shortfalls that continue to plague cable.

Conversely, cable networks such as TNT, Nickelodeon, Lifetime, A&E and The Discovery Channel have seen their prime-time ratings—and therefore, the gross-ratings points they have to sell—grow dramatically in the last few years. They all reaped considerable ad revenue increases in the upfront just passed—in the range of 15 to 25 percent over the 1996 upfront market—but their CPM increases rarely broke 5 to 8 percent, often ending up lower than 3 percent.

Media buyers who believe that cable fared quite well this year expect similar marketplace conditions next year. For one thing, nobody expects ratings among the cable networks in general to drop anytime soon. And that means that budgets put aside by media buyers for cable will increase to fill those ratings points, not to push up CPMs.

"The trend will continue, as we see it," says Steve Grubbs, executive vice president/director of national broadcast at BBDO. "Of the total TV pie, cable, naturally, is going to grow its share. The whole process of planning cable [into TV budgets] has become more accepted. But talking about CPM increases is kind of irrelevant. Their interest is in growing revenues, and they can increase their revenue 20 to 30 percent" based on ratings growth, he adds.

It should be noted, though, that several mature cable networks have suffered their own ratings erosion at the hands of their smaller cable brethren. TBS Superstation, CNN, MTV and USA Network, even ESPN, have seen prime-time ratings gradually shrink during the last five to seven years, while smaller networks such as The Learning Channel and Comedy Central draw larger audiences. Ironically, it's those big networks—except USA and TBS—that draw the highest CPMs in cable, based on their longevity and demographic purity.

> Gates' $1 billion investment in Comcast "was a big vote of confidence."
>
> —MARVIN SHAPIRO, VERONIS, SUHLER & ASSOC.

Gene DeWitt, president of media buying firm DeWitt Media, points out that the high end of cable CPMs is no longer the exclusive territory of CNN and ESPN, thanks to the higher-profile program stunts by other networks. "The cable guys are getting good at promotion," DeWitt explains. "When a cable network delivers a high rating—a Turner special or a Discovery special—it can get a network-level CPM. This is the first year I've seen that happen."

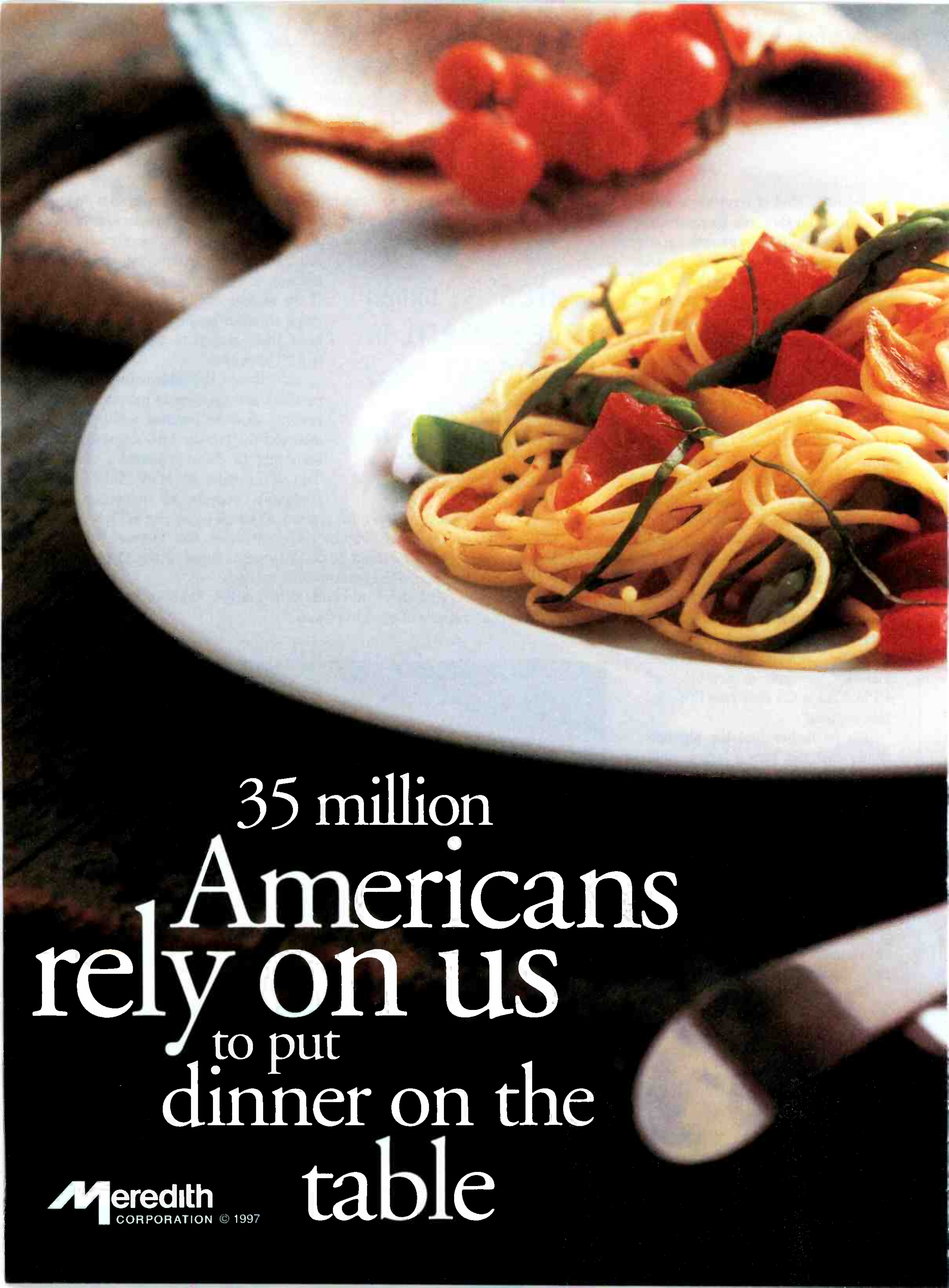
It's no longer just the big networks that can lure a larger audience, either. Only a few weeks ago, FX exemplified the ratings growth that the medium-size networks are enjoying. Though it counts only 30 million homes, FX delivered a huge 3.3 household rating in its universe with its off-network premiere of *The X Files*. And the premiere of *NYPD Blue*, another off-net acquisition, drew a 2.2 universe rating its first night out.

For now, the fourth-quarter scatter market appears devoid of activity. Sales executives have complained that few dollars are working the market, but that could have been due to the pre–Labor Day lull. If the lull continues, it could bode ill for cable going into 1998, an Olympic year that draws many big-name advertisers with hefty budgets out of the marketplace.

"If they had any hopes of getting premiums in scatter," cable is in for a big surprise, says Julie Friedlander, senior vice president/director of national broadcast at Ogilvy & Mather. "They had to be really aggressive to sell the huge volume of inventory in the upfront, to try and tighten up scatter. If the ratings continue to grow, that's going to work against them and hold back their ability to get the higher [CPM] increases."

As it stands, the cable networks will probably end up from 14 percent to 17 percent ahead in revenue, while CPM increases will remain in low single digits, according to John Popkowski, president of ad sales at MTV Networks. Popkowski expects his networks to slightly outpace the market, although he admits MTV, as one of the more mature cable networks, will increase its ad revenue by about 12 to 13 percent, ahead of the 11 percent average of the mature cable services.

His advice on reading the market: "Follow the earnings reports of the advertisers." ■


35 million
Americans
rely on us
to put
dinner on the
table
Meredith
CORPORATION © 1997

Radio

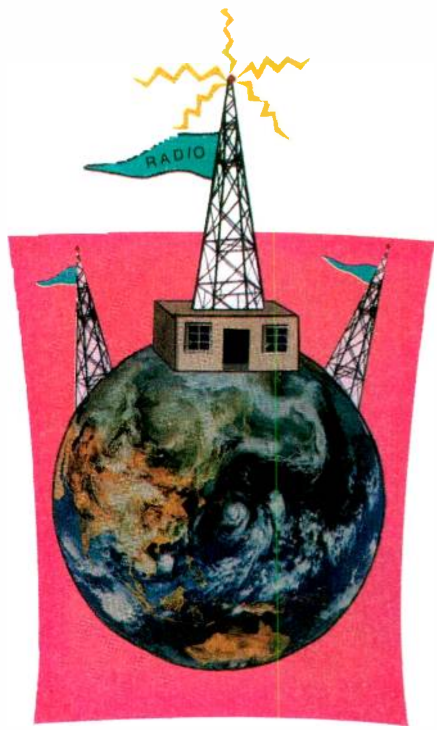
Consolidation puts a mega-hurt on indies

BY PAUL D. COLFORD

'98 SPENDING FORECAST:	
VERONIS +7.9%	
ZENITH +4.9%	
'97 SPENDING: $11.2 bil*	
'96 SPENDING: $10.9 bil*	

Source: Zenith Media

Behold Chris Brennan, a rare species. At the end of August, the president of One-on-One Sports Inc., based in suburban Northbrook, Ill., completed his $18 million purchase of New York's WXLX-AM. He plans to replace its Spanish-language music format with jock talk in early September. This will pit the new kid Brennan against the mighty WFAN-AM, whose $42.3 million in commercial revenue last year was tops in the entire country. In other words, Brennan's arrival in the Big Apple casts him as a vanishing breed, the independent operator in an industry of ever larger and more powerful groups of stations amid consolidation mania. "Yeah, I guess it's like a David and Goliath situation," he says.



In New York, 13 owners, controlling 27 of the 50 or so stations, dominated the listening habits of the local audience in 1996 and collected 96 percent of the $501 million spent on radio advertising in the market, according to BIA Research Inc.'s State of the Industry '97. Less than half the number of owners have cornered more than 90 percent of radio revenue in Philadelphia, Detroit and Boston. Indeed, the bigger players have so expanded their holdings, reducing the number of owners last year by 357 (or 6.8 percent), that BIA's analysis of the country's top 100 markets shows that an average of 5.1 entities per city accounted for 92.1 percent of market revenue.

These were the startling numbers at the end of last year, only 10 months after President Bill Clinton raised the limits on how many stations a company could own by signing the landmark Telecommunications Act of 1996.

This year, of course, the game of can-you-top-this has intensified. Chancellor Media Corp. is about to become one of the nation's top three radio groups, following the approval-pending merger of Chancellor Communications Corp. and Evergreen Media Corp., and the new entity's $1-billion purchase of 10 Viacom stations from Sumner Redstone. In addition, Clear Channel Communications, which already owns 123 stations, recently announced it is acquiring the 46 outlets of Paxson Communications as part of a $693-million package that will swell the buyer's business to 53 stations in Florida alone. And as summer faded into the Labor Day weekend, two other megadeals were coming into view. SFX Broadcasting Inc., the eighth-largest group, was being picked up by Hicks, Muse, Tate & Furst for $2.1 billion and assumed debt, thereby expanding the Dallas buyout firm's Capstar Broadcasting Corp. to a total of 314 stations in Dallas, Pittsburgh and 77 other markets. And American Radio Systems Corp., the fourth-largest, was being shopped by Credit Suisse First Boston for billions more.

"Arithmetically, the consolidation has to end sometime, and my best guess would be two or three years on the outside," says Peter Bowman, vice president of BIA Consulting Inc., a strategic and financial adviser to broadcast companies. "I think it's conceivable that we'll have groups consisting of as many as 500 radio stations."

Although media buyers have expressed fears that consolidation will drive up ad rates, putting them in a take-it-or-leave-it bind, Radio Advertising Bureau president Gary Fries says that impressive demand (national ad revenue is up 16 percent in the first six months of 1997) already has driven up rates. Stations, he says, will also benefit from better management. "Consolidation is going to bring more solid radio avails and more-focused inventory to advertisers," says Fries.

Another development to watch is consolidation's effect on programming. A common view is that it may result in more homogenization of formats on the dial. However, Veronis, Suhler & Associates' latest Communications Industry Forecast sees the need for diversity in programming. Defining consolidation in terms more familiar to makers of laundry detergent and breakfast cereal, the investment bank foresees "a battle for shelf space," as debt-loaded operators seek to reach larger segments of the listening audience and exercise greater clout with advertisers and vendors.

"People who were once broadcasters have become nothing more than real-estate speculators," says Robert Feder, radio columnist for the *Chicago Sun-Times*. "From the consumer's point of view, I've seen no good that's come of consolidation." ■

ILLUSTRATION BY AARON THOMAS ROTH

THE BOX'S

12-34 year olds

ALWAYS get what THEY Want

THE BANDS

BOX viewers have come to expect a music video mix that's created specifically for them. And they get it. THE BOX programs a precise play list of Pop-Rock, Urban, Country, Latin or Mainstream music videos that meets the local tastes and demands of viewers in each market. That's why THE BOX has the highest concentration of 12-34 year olds of any network— broadcast or cable.

The music videos they want to see. The products they've got to have. On THE BOX — all day, every day.

THE BRANDS

THE BOX's demanding audience will demand your brand, too. THE BOX environment offers high viewing time and low commercial clutter. So your message is sure to be seen by BOX viewers, who over index the national average of 12-34 year olds on purchases of athletic shoes, soft drinks, and apparel. Chances are what they see on THE BOX is what they'll get. Including your product. Advertisers know that when you need to reach determined 12-34 year olds with purchasing power, THE BOX is the place your brand needs to be.

A higher concentration of 12-34 year olds than any network.

THE BOX

National Advertising Sales
East Coast:
Jeff Elgart 212.253.1720 ext. 22
West Coast:
Nina Boski 310.441.8425 ext. 223

Sources: MRI 1996 TwelvePlus Base 12+, MRI 1996 TwelvePlus Base 12-34)

Outdoor

After smoke, there's still some fire

BY VALERIE BURGHER

'98 SPENDING FORECAST:
VERONIS +2.4%
ZENITH +5.0%
'97 SPENDING a/o 5/31: $218 mil*
'96 SPENDING: $1.1 bill*

*Source: Competitive Media Reporting

Outdoor's irrepressible urge to merge in 1997 leaves only a handful of large publicly owned companies to slug it out for advertising dollars in 1998. The benefits of those consolidations, along with improved outdoor technology, should translate to a 6 percent increase in advertising revenue, boosting outdoor's 1998 total ad spending to $2.2 billion.

Outdoor Systems, Eller, Lamar, TDI and Universal Outdoor, all of which made major acquisitions this year, will continue to dominate. "The consolidation certainly gives these large companies much greater coverage and presence in a number of markets," says John Hunt, research director for the New York-based Outdoor Advertising Association of America. "Having such a large proportion of total outdoor inventory will gear them even more towards national advertising."

A study by investment bank Alex Brown & Sons predicts some growth for out-of-home's national share, but the industry will continue to rely heavily on local buys. The dominance of larger companies, however, is expected to help alleviate a longtime industry problem: the prevalence of smaller operators that could not provide full-market coverage.

"Consolidation raises the overall level of professionalism in the industry," says Tom Yauger, vice president of California's Brush & Daven LLC, an investment banking firm that specializes in outdoor advertising. "The level of service and the quality of outdoor displays are going to go up."

The increasing use of computerized paintings, video billboards and trivision—which allows marketers to display three revolving images on one board—should make the outdoor medium more attractive, particularly to retailers.

Currently, three-quarters of all billboard displays use vinyl rather than paint, and that percentage is expected to increase next year. Vinyl's advantages, including speedier application and better reproduction quality, have helped draw couture retailers into the outdoor mix in the past three years. "The Calvin Kleins, the DKNYs, for them to use your medium is a powerful plus," says Hunt. "Other retailers can see the quality and creativity that goes into the medium. So now these people are holding outdoor in higher esteem. That kind of impetus gets things going."

Advertisers caution that the recent consolidation craze should *not* encourage undue rate increases, particularly since low-cost pricing is a large part of outdoor's appeal. "It's hard to keep track of who is still in business," says Jack Cohen, director of print and outdoor buying for DDB Needham Optimum Media. "I would hope they would think twice before hiking up rates."

With Outdoor Systems leading the pack with seven acquisitions this year alone—most recently, it picked up 3M National Advertising for $1 billion—the Phoenix-based behemoth has also led the way in decreasing its reliance on tobacco.

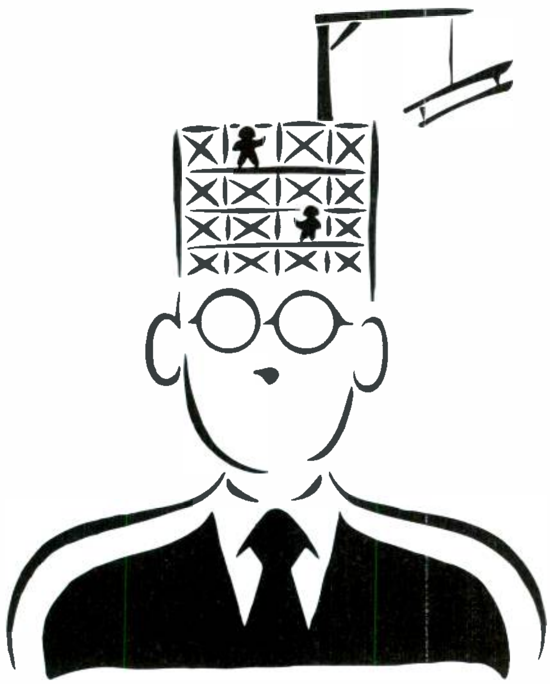
By now, out-of-home companies have had nearly two years to mull over the potential loss of $160 million in outdoor tobacco money. Generally, outdoor's dependence on Joe Camel and the Marlboro Man has decreased. According to the investment firm CIBC Wood Gundy, tobacco ads accounted for 8.2 percent of Outdoor Systems' total revenue in 1996, down sharply from 34.1 percent in 1991. Next year, tobacco will account for only 4 percent of the company's revenue.

The hope is that when Congress finally determines tobacco's fate, sufficient alternatives to this lucrative ad category will be available. The other big question mark is whether new advertisers will be willing to pay top dollar for those prime locations. "As longtime incumbents, tobacco companies have had rates that are below the market," observes Hunt. "The tobacco sites would command a premium that [outdoor companies] may not be getting now, so they need to draw in a different advertiser for those prime spots."

There are no guarantees that there will immediately be takers for such prime real estate. But since many markets, such as San Francisco, have gradually imposed voluntary bans on cigarette advertising, the larger companies are already courting an alternative clientele. ■

ILLUSTRATION BY AMY GOLDBERG

Before Japanese Influentials Go To Work, We Go To Work On Them.



Most *Asahi Shimbun* subscribers read our newspaper at home. In the calm of the morning. Free from the distractions of business pressures, telephones, appointments, and meetings. A good thing, since we have more subscribers who are business and opinion leaders than any other newspaper. So at work, they tend to be very busy.

But not at home, apparently. Because they spend a great amount of time reading *Asahi Shimbun*. More time, as a matter of fact, than the average for other general newspapers.

Even more revealing is which publications these business and opinion leaders don't happen to read.

More than 92% of *Asahi Shimbun* subscribers don't read the most-well-known business newspaper in Japan.

And more than 95% of *Asahi Shimbun* subscribers don't read the other most-widely circulated general newspaper in the nation, either.

It's no wonder, then, that *Asahi Shimbun* earns more advertising revenue than any other newspaper. Because for our advertisers, things just don't seem to work out any other way.

Asahi Shimbun

We're out to open minds for you.

Asahi Shimbun International Advertising Department, 5-3-2 Tsukiji, Chuo-ku, Tokyo 104-11, Japan
Tel: +81-3-5540-7755 Fax: +81-3-5540-7741 Internet: http://www.asahi.com

Representatives in New York, Mexico City, Buenos Aires, Rio de Janeiro, Hong Kong, Singapore, Malaysia, Bangkok, Kathmandu, Bombay, Sydney, Auckland, Athens, Milan, Paris, Geneve, Wien, Frankfurt, Stockholm, London, Lisbon.

Consumer Magazines

Ad dollars boom, but circ is shaky

'98 SPENDING FORECAST:	
VERONIS	+8.2%
ZENITH	+5.5%
'97 SPENDING a/o 5/31:	$4.8 bil*
'96 SPENDING:	$11.2 bil*

*Source: Competitive Media Reporting

BY JEFF GREMILLION

The country's continuing economic prosperity will propel strong growth in advertising spending in consumer magazines, the experts say. But be warned, they add, that the circulation part of the equation—and the increasingly complex nature of profit-margin and brand management—will create new challenges for the industry.

Total ad revenue for magazines will grow at a compounded rate of 7.9 percent during the next five years (1997–2001), to $21.6 billion, predicts Veronis, Suhler & Associates. Spending grew at a rate of 6.7 percent in the prior five years. For the most part, a boom in ad spending by the major ad categories will account for the accelerated growth.

For 1998, total ad spending is expected to increase 8.2 percent, to $10.5 billion, over the projected 1997 total, which would be 7.7 percent more than the 1996 figure.

"The advertising market will respond to the economy, which we believe will continue to expand," according to Veronis' most recent forecast. "In addition to a healthy economic underpinning, the consumer magazine industry reflects the transformation of the economy." Most major magazine companies are expected to raise their ad rates a moderate 5 percent or so.

Longtime top spenders in automotive, an ad category especially sensitive to the economy's ups and downs, will moderately increase their spending, while breakout categories such as drugs & remedies and computers & office equipment, which have grown significantly in recent years, will continue to show dramatic, double-digit growth.

Other likely high-growth categories include publishing & media, business & consumer services, and travel, hotels & resorts. Other consistently strong categories for which the experts predict moderate growth are food and toiletries & cosmetics. Another top-10 category, direct mail, which dipped 5.4 percent in spending last year, is expected to chart moderate growth again this year and next year.

Some publishers are concerned that new FDA regulations softening the restrictions on TV drug ads have cleared a path for a large exodus of pharmaceutical ads from print to broadcast. The cash-cow drug & remedy category increased its ad spending in magazines a breathtaking 36.7 percent last year, continuing a long-term, double-digit growth pattern; declining ad sales in that category would be trouble.

"Despite the flurry of interest in TV [by the drug companies]," says Magazine Publishers of America vice president of marketing Chris Miller, "my sense is they're very clear that this is a category in which people need [more information than can be relayed in a TV spot]."

Miller adds that D&R is not the only battle on the horizon next year between magazines and TV. Citing declining network viewership, severe audience fragmentation in television and increased penetration of VCRs, which alters the way TV is "used," she says the time is right for magazines to ambush the medium that has long been its chief rival. "The differences between magazines and television are more pronounced than ever," Miller says, "and magazines' advantages are more clear." Magazines are more efficient in reaching advertisers' target audiences, she adds.

On the circulation side, the picture isn't quite as bright. Circulation income is expected to grow only slightly over the next five years. In 1998, circ income will increase 2.9 percent, to $7.6 billion, against the estimated 1997 figure. The increased revenue is a function of aggressive increases in newsstand prices and moderate increases in subscription prices, not increased sales. A long-term downward trend in newsstand buying will dip dramatically (-3.2 percent) this year, and will continue its decline indefinitely, according to Veronis estimates. Subscription income will remain essentially flat.

"One of the obvious reasons for the continued pressure on

ILLUSTRATION BY AARON THOMAS ROTH

single-copy sales is clutter," says Paul Hale, a managing director at Veronis. "Every year there are more magazines than ever before." Hale also surmises that magazines may have reached a "point of resistance" with their price hikes.

Roberta Garfinkle, senior vice president at McCann-Erickson agrees: "Ever-shrinking magazine circulation is certainly an important issue. I think you'll see ad-page declines in many magazines as a result. The pie isn't growing—the reader pie or the ad pie. The actual magazine delivery number is a lot closer to rate base than it used to be for most books. You're not seeing any huge bonuses."

"You never know when advertisers will start retracting"

—CATHIE BLACK, HEARST MAGAZINES

The consolidation of magazine wholesalers is an uncertain factor in the circulation puzzle. In the past two years, the number of wholesalers has shrunk from about 275 to 60. The chaos of the process itself was blamed for some of the fall-off in single-copy sales across the board. In the aftermath, observers say special-interest magazines—whose general health continues to be a few points better than general-interest books, but which tend *not* to leap from the newsstand—may be bumped from distribution lists. General-interest books would theoretically benefit from less clutter.

The new, consolidated newsstand will likely favor big companies over independent titles, and will frown especially on independent launches. Special-interest books would have to "redouble their efforts to get into specialty outlets," says Hale. He adds that a new sub-industry, "secondary wholesaling," may develop to handle distribution of special-interest titles on a local basis.

The overall slip in actual units sold isn't necessarily a bad thing; production costs, though moderate compared to the sky-high levels they reached in 1995 and 1996, remain burdensome and are expected to edge up later this year and next. Hale predicts more companies will follow Hearst Magazines' controversial lead, encouraging circ to drop while raising prices for consumers and advertisers. "But they'll probably do it quietly," says Hearst Magazines president Cathie Black.

"The quality of the circulation is the most important thing," says Black. "It doesn't pay to chase readers." The dominance of advertising in the current profit picture and the challenges in building quality circ, she adds, call for no-nonsense margin management. "You never know when advertisers will start retracting," cautions Black. "You have to make sure your revenue doesn't get eaten up with expenses—with promotion or salaries or anything else that keeps it from hitting the bottom line."

As long as the economy flourishes, mergers-and-acquisitions activity will stay at full throttle. The market is favorable to sellers, and investment capital is easy to come by, analysts say. Another industrywide phenomenon—the push for profitable brand extension—is also in high gear. "The biggest development is the focus on ancillary products," says Hale. "We're rapidly turning publishers into multimedia managers."

But Hale adds a cautionary note: "Everyone is wondering how much longer this Goldilocks economy will continue." ■

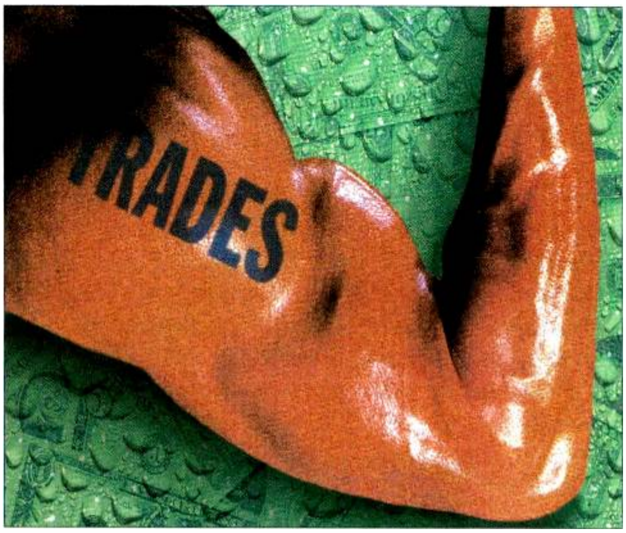
Trade Magazines

Despite downsizing, new highs

'98 SPENDING FORECAST:
VERONIS +8.6%
ZENITH NA
'97 SPENDING: $7.0 bil*
'96 SPENDING: $6.5 bil*

*Source: Veronis, Suhler

BY JEFF GREMILLION



Advertising spending in business-to-business magazines is as healthy as it has ever been, and the trend will probably continue, experts say. The end of the long-term corporate restructuring favoring efficiency over size—which began in the 1980s and continued through the early '90s—has coincided with an era of general economic prosperity. The result: high profits and rampant expansion favorable to the trade ad market.

Ad-spending growth in trade books reached an eight-year high in 1996, jumping 10.3 percent, with a total take of $6.5 billion, according to Veronis, Suhler & Associates. The American Business Press, integrating data from its new Business Information Network tracking service with other industry figures, says the figure topped $7 billion. Most experts agree that ad spending on trade books will continue growing at a compound annual rate of at least 8 percent for several years. "What we're seeing is quite extraordinary in terms of continued growth," says Veronis analyst Hal Greenburg.

Heading into 1998, hot ad categories include the multibillion-dollar computer segment, which has grown at a compound rate of 11.4 percent for five years; automotive, which has grown at a compound rate of 10.2 percent over the same period; and healthcare, whose fortunes turned around in a major way last year, posting 12.9 percent growth after major slips early in the decade, according to Veronis. ABP adds to that list food & agriculture, which it says showed an increase of 31 percent for the first half of '97.

"What pleases us most about this is the broad base of growth," says ABP president Gordon Hughes II, reflecting on how computers and technology titles far outpaced most other segments a few years back.

The circulation story is less dramatic.

Total circulation has been on a long-term decline for years. And recently, publishers eager to capitalize on the boom in ad spending beefed up their rate bases with controlled circulation—a move that led to even worse sags in paid circ.

But the falloff is not a big problem. Circ spending, which 10 years ago accounted for more than a third of all trade-magazine revenue, will this year account for less than a fourth of revenue, according to Veronis projections.

"Circulation is not a major factor," says Greenburg. "It's the efficiency of the circulation that counts—advertisers reaching their target audience."

Still, higher circ means higher ad rates. Publishers have to worry a bit about predictions that growth in controlled circ will slow over the next few years because of corporate downsizing, and because most of the finite number of qualified trade readers have already been reached. So-called "pass-along" readership and demographics are beginning to become larger issues; some publishers have already turned to syndicated research firms such as MRI, according to ABP's Hughes.

The current hot streak of mergers and acquisitions is likely to continue next year. Industry watchers say the dollars exchanged in several recent deals have far surpassed expectations.

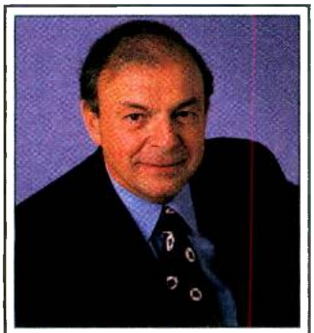
The temptation to sell will be high, and "consolidation" will be a buzzword for companies mesmerized by their own high profits and economies of scale. Also, more publishers will launch or acquire trade shows: Veronis says trade shows will become a $10 billion industry by the end of the decade, growing at a compound annual rate of 10.4 percent over the next five years.

Amid all the good tidings, Hughes is pessimistic on one point. He had hoped to see increased interest from non-endemic advertisers in the trade press. So far, with the notable exception of American Airlines buying ad space in medical and marketing books, it hasn't happened.

"We haven't gone after those ads," he says. "For that, shame on us." ■

ILLUSTRATION BY AMY GOLDBERG

"I'm glad we spent *more* in magazines."



Peter J. Spengler
Vice President
Marketing Services
Bristol-Myers Squibb Company

When you've got a product breakthrough, you get the word out fast. In February 1997, we received FDA clearance to market our new OTC product, Vagistat®-1. It had just become the first and only one dose medicine for vaginal yeast infections available without a prescription.

One real victory for women: our magazine ads tell the story in an intimate, personal way, even more convincingly than television.

Our introductory ad plan used both magazines and television—with a creative twist. One of our agencies, Wells-BDDP, created the TV spot.

A second shop, Gotham, created the "Big #1" concept that was adapted by Wells-BDDP in their magazine ad campaign. The print creative was truly collaborative. It was unorthodox—taking the best of both—and it worked.

"Since two years ago, we've almost doubled our magazine spending."

Since two years ago, we've almost doubled our magazine spending. Print budgets are growing even faster than broadcast budgets.

I'm a passionate believer in having media planning and buying in-house. Our media planner for Vagistat-1 sits just three offices away from the product manager. The ideas go back and forth constantly.

Personally, I'm a magazine *looker-througher.* I pick up a magazine—look through it—and can always find the one story that grabs me.

MPA
Magazines make things happen

Newspapers

Wanted: local news, national ads

BY VALERIE BURGHER

'98 SPENDING FORECAST:
VERONIS +7.0%
ZENITH +3.5%
'97 SPENDING a/o 6/30: $19.2 bil*
'96 SPENDING: $38.2 bil*

*Source: Newspaper Association of America

Despite sagging circulation, companies are pumping more of their advertising dollars into daily newspapers than they have at any time since the go-go '80s, and the quantum percentage increases seen then will resurface in 1998. Lower newsprint prices over the past two years have allowed publishers to maintain rates that appeal to marketers. A generally healthy economy has also helped bring in the money, if not the readership.

The Newspaper Association of America (NAA) reported that 1997 first-quarter advertising revenue jumped 8.9 percent to $8.9 billion, the best single-quarter showing for newspapers in 10 years. Through the first six months of this year, total ad revenue was $19.2 billion, a 9.5 percent gain and $1.7 billion more than the first half of 1996. Total ad spending is expected to increase by $1.3 billion in 1998.

Retail, traditionally the best-performing advertising segment for daily newspapers, had the smallest percentage increase of all the categories for the first half of 1997. Total retail was $9 billion, up only 7 percent from last year. The rash of department store mergers and closings of smaller shops have forced newspapers to rethink their retail strategies.

A rebound, however, is expected as entertainment companies, supermarkets and computer electronics superstores begin to fill the void. "In most markets, you'll find that papers have suffered through some cycles of ma-and-pa shops giving in to megastores," says Dennis Grant, vice president, advertising sales and marketing for *The Chicago Tribune*. "They'll have a better time in the future because they've learned to live with the megastores by now."

The recent uptick in national advertising is partly due to an earlier need for retail alternatives. National ad revenue totaled $2.6 billion in the first half of 1997, up 13.6 percent over the same period in 1996. Strong healthcare clients and new product introductions sped the category along. "We've urged the industry to pay more attention to growth opportunities in national," says Nicholas Cannistraro Jr., president of the Newspaper National Network. "National is more likely to need what newspapers offer," he adds, referring to the fact that daily papers reach 60 percent of the U.S. adult population. "They just weren't approached because of the reliance on retail."

A recent proposal by the Food and Drug Administration to soften regulations on pharmaceutical TV advertising, though, could threaten the potential growth of national ads next year. The proposed legislation would make TV a viable outlet for marketing pharmaceuticals, a category that print has dominated because of the necessity to include fine-print warnings.

Another staple of newspaper revenue—classifieds—has grown at a steady clip and should continue to thrive as computer capabilities improve. In the first six months of 1997, classified ads contributed $7.6 billion to the industry's revenue stream, up 11.4 percent from last year. "Online is really the only place in the classified arena to get the latest possible listings," says Grant. In 1998, classifieds should benefit the most from new online technologies. Knight-Ridder New Media, for example, has begun allowing people not only to read classifieds online, but—for a fee—to place them directly in cyberspace via a browser.

Computer-based commerce should also become a standard time-saver, making the medium even more attractive to advertisers. Newspaper planner MediaPassage recently launched a service which offers quickly accessible profiles on newspapers that advertisers can use to make their placements. MediaPassage also provides the software to send ad copy through the Net. "The ad agencies and ad reps love it because there are no errors," says Grant.

Though the industry is getting its managerial house in order, newspaper executives are taking a hard look at continuing circulation dips and trying to assess what readers want. In many cases, they are coming up with the same answer: local news. The increasing success of suburban weekly chains has driven dailies to beef up their own local coverage to stay competitive. ■

ILLUSTRATION BY MATT COLLINS

Interactive

Everything catches in the Net

BY CATHARINE P. TAYLOR

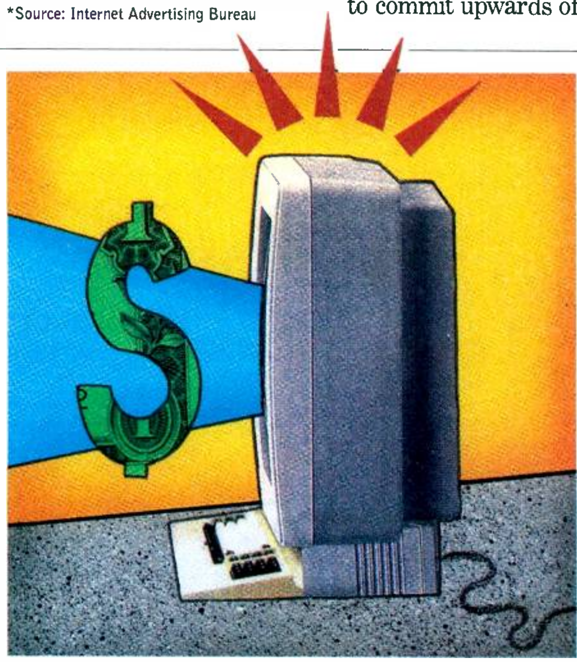
'98 SPENDING FORECAST:
VERONIS +93.8%
ZENITH NA
'97 SPENDING: $400 million*
'96 SPENDING: $200 million*

*Source: Internet Advertising Bureau

Those of you already tired of the rose-tinted predictions about the growth of Internet ad spending should read no further. The hype continues unabated. Veronis, Suhler & Associates pegs 1998 growth at a robust 94 percent increase over this year's projected expenditures of $400 million. But that forecast seems conservative compared to those of other pundits, most of whom are predicting *triple-digit* growth. Zenith Media believes that ad spending in cyberspace will double every year from now through the year 2000, and Jupiter Communications predicts that $940 million will be spent on online ads this year, compared to $301 million in 1996.

The bullish projections can be attributed not only to the sharp increase in the number of netizens browsing the World Wide Web but also to the addition of ad categories new to the medium and the advent of new forms of online advertising. "The medium is coming of age for Web marketers in the nontechnology field," says Myer Berlow, senior vice president of interactive marketing for America Online. Berlow envisions an online world where marketers will use a myriad of methods to grab eyeballs. "You get audience by creating a marketing vehicle either on AOL or the Internet," he says. "And a Web site is one of those vehicles."

Even as the Web site banner-ad approach has become commonplace, more dollars are being committed to new online ad forms, such as sponsorships and interstitials, which, like TV commercials, are full-screen come-ons inserted between hefty slices of content. In the past year, interstitials have popped up everywhere, from MSNBC to the Berkeley Systems trivia game, "You Don't Know Jack." Sponsorships have also proved lucrative: Earlier this year, when Sony launched its entertainment site, Sony Station, it garnered $1 million in advertising commitments from the likes of Kellogg and Sears. Banner ads currently account for 80 percent of online ad revenue, but Jupiter predicts that sponsorships and interstitials will account for about half of all online ad spending by 2002. The reason? Banner ads just aren't that compelling. "I haven't seen any banners that make me cry the way that old AT&T TV ad can," says Peter Storck, group director of online advertising at Jupiter.



Still, ambitious Internet ad executives harbor concerns about whether mainstream marketers really understand what the Internet can deliver. No one is crying about Intel's decision earlier this year to commit upwards of $75 million to bringing its "Intel Inside" campaign to the Internet, or stirrings from Microsoft that it, too, is upping its Web spending substantially. But for many consumer-based sites, truly great news would be for Procter & Gamble to commit massive resources to marketing, say, Pringles, over the cyberwaves. "My personal concern is that even the people who are spending are not creating a budget line for [Web advertising]," says Richy Glassberg, senior vice president of Turner Interactive Marketing & Sales.

Some studies underscore this problem. Saatchi & Saatchi Advertising's Darwin Digital unit recently conducted focus groups with media planners and discovered that most were behind the curve on such well-documented shifts as the growing percentage of women online. "It was frightening how the people who buy on the Web repeat the same clichés," says Greg Smith, director of strategic services at Darwin Digital.

The Internet cognoscenti won't take such affronts lying down. In August, Berkeley and America Online both released studies to demonstrate that the Internet *is* an effective awareness medium, a pitch seemingly crafted specifically for package-goods and fast-food marketers, whose dollars online ad-sales executives crave. If that weren't enough, marketers may soon find members of the Internet Advertising Bureau on their doorstep as part of a road show designed to preach to the unconverted. "I think that on a broad scale, people have not figured out how to use the Internet," says Scott Schiller, IAB vice chairman and vice president of advertising and partnership marketing at Sony Online Ventures. "What the road show needs to do is help develop comfort among traditional advertisers."

But the question remains: Do they want comforting? ■

ILLUSTRATION BY AARON THOMAS ROTH

5-Year Outlook

Convergence: One Size Fits All in the Livingroom

BY JON D. MARKMAN

Around 8:30 a.m. on a weekday in mid-August, Seattle commuters tuned to rock station KMTT heard the future roar. The Rolling Stones, declared disk jockey John Fisher, were about to hold a press conference 3,000 miles away, on a barge off Brooklyn, N.Y., to announce a new national concert tour. And listeners with a computer and a modem, he announced, could dial up the station's home page on the Internet to view the event—live via modem—through a new type of software called video streaming.

The two-inch-square walking, talking, strutting image of Mick Jagger and the band started rolling briskly across the computer screens of thousands of Internet users around Seattle—and the rest of the globe—at 1:10 p.m. EST. More than just a fleeting moment in time, the event appeared to many to augur a world to come in which consumers can brush aside conventional media providers with the flick of a mouse and a vertiginous array of electronic devices can emerge to feed the growing hunger for information on demand.

"People have scoffed at the idea of the convergence of the

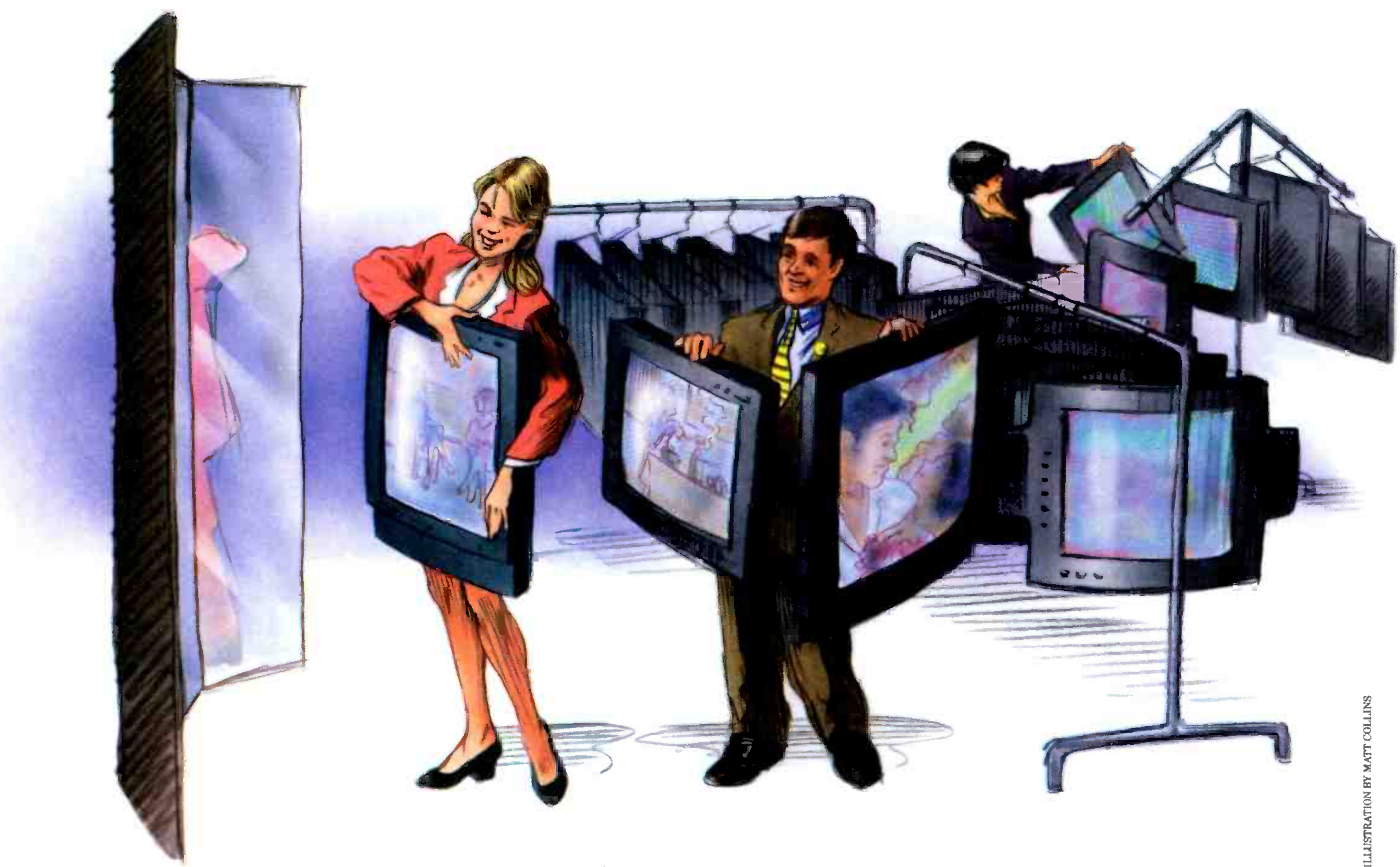


ILLUSTRATION BY MATT COLLINS

media for a long time, but it now appears that the buzzwords are justified," says Eric Dubin, a telecommunications analyst at Infrastructure, a high-tech investment research firm.

Indeed, five years farther on down the road, the various media are likely to meld together so seamlessly that accessing information and entertainment digitally from some sort of cable in the wall or beam in the sky will become almost as simple as turning on a light by flipping a wall switch. And any sentient human being who complains they can't get no satisfaction from the pervasive new sphere of data will be perceived by peers as either pitifully unplugged or slightly mad.

The impetus for the headlong rush to the future are the age-old drivers of commerce—greed and fear. Advertisers, who foot the bill for most media, lust after the money to be both saved and attained when they gain the ability to narrowly target customers through digital devices, track habits, and actually transact a sale at the instant of highest brand impact. Consumers have likewise proven themselves anxious to use the global network of computers to plunge more quickly into the media stuff that interests them and tune out the rest. Meanwhile, traditional news organizations, alternately fretful and fascinated, mostly want to figure out how to facilitate both aims—for a small fee—and get the hell out of the way.

Says Fisher, the KMTT disk jockey who also runs the station's World Wide Web site: "We know that if we don't embrace the Net, somehow it's going to eclipse us."

Any such forecast is little more than an educated guess—after all, few of today's avid Internet surfers had even heard of the Web just four years ago, so the danger of being blindsided by new technology is immeasurable—but some numbers help set stakes in the ground.

Today, about 98 percent of U.S. households have telephones, 97 percent have television sets and 66 percent get cable service. However, only 38 percent of households have PCs, and fewer than 25 percent regularly access the Internet.

Of those people who do live and breathe the Net, most pay around $20 a month to connect through cheap phone modems at speeds of 14,400 to 28,800 bits per second. A fortunate fraction in the vanguard spend upwards of $100 a month to use pricier ISDN modems that cruise at up to 120,000 bits per second.

The key bottlenecks in the wider acceptance of the Internet as a broad gateway to news and entertainment are the relatively high costs of computers and the slow telephone access speeds. Most experts concur that these factors point inevitably toward a time, five years out, in which the Internet will become the mass medium of choice—not through the phone/computer duo but through the cable/TV setup. A dark horse galloping on the near-horizon, however, is extremely fast access to the Internet via digital satellite downlinks, courtesy of such companies as Echostar Communications and Hughes Electronics Corp.'s DirecPC division.

Cable's principal advantage is that its "broadband" technology offers a much fatter pipeline through which the media can push its wares. Today, MediaOne Express, a cable unit of telecommunications giant US West Communications, is offering neighborhoods in Boston, Detroit, Jacksonville, Fla., Chicago and Miami access to the Internet at 1.5 million bits per second—a speed 10 times faster than current ISDN phone modems. In five years, says vice president Rob Stoddard, the vastly upgraded system won't break a sweat pulsing data and video downstream through its hybrid fiber-optic and coaxial cable network at 10 million bits per second.

> "If we don't embrace the Net, we know somehow it's going to eclipse us."
>
> —JOHN FISHER, KMTT, SEATTLE

The price even now isn't bad: $70 to $100 a month for high-speed Internet access plus 60 to 70 regular cable channels. In a year, Stoddard says, MediaOne will add standard voice telephone service to its list of offerings in those test cities—an event that will completely blur the line in consumers' minds between their cable and telephone utilities. In fact, the MediaOne cable is likely to be split three ways once it enters the home—with one line going to the television for cable programming, another going to the personal computer for data, and the third going to the telephone for chatting with your friends about all these neat gizmos.

Five years hence, therefore, consumers will care as little about whether their video, data and voice-service provider has roots in the cable or telephone industry as they currently care about whether their electric power is generated by water, oil or gas. A consumer will simply make a hardware choice based on various telecommunication conglomerates' prices, marketing and customer service.

Several recent surveys have indicated, however, that most people have a higher degree of satisfaction and confidence with their telephone company than their cable company. These telephone traditionalists' ace in the hole will be an upgraded service called ADSL, or asymmetric digital subscriber line, which will permit data to speed up to 8 million bits per second over the current twisted-copper-wire network running above every street in America.

The possibilities for a new-media experience at such speeds

5-Year Outlook

are the stuff of science fiction; the cool hardware will beget ever-cooler software. The result, according to experts? The broadcast media's current linear control of consumers' TV time will vanish.

How about the chance to scan video headlines, a scenario in which you can plop on the couch at the end of a long day at work, point the remote at the screen and watch TV networks' coverage of the day's events in the order *you* wish? Better yet, technology called Intercast, developed by PC-chip giant Intel Corp., will watch the vertical blanking interval of all TV signals during the day and assemble a personal news and entertainment broadcast just for you via the Internet.

Says George Bell, chief executive of the Internet directory company Excite Inc., which is competing with the likes of Yahoo! and Microsoft to be the principal home base, or content aggregator, for Web users: "In whatever delivery form, news and entertainment will become much more personalized over the next five years. For our customers, the effect is to greatly increase the efficiency of time spent in the media."

This media convergence of the future is already starting to get interesting, thanks to outfits like Worldgate Communications Inc., a two-year-old interactive TV software start-up in Philadelphia backed by Motorola, Citicorp and the leading set-top cable box makers. Under the direction of Hal Krisbergh, the company has developed the ability to turn almost any existing set-top box into an Internet access device; it's undergoing trials now on Cablevision, Comcast and Charter cable systems in New York, Philadelphia and St. Louis.

The beauty of this approach, according to analysts, is that Worldgate does not require a consumer to buy any new equipment. Internet access simply becomes a premier tier of cable service viewed on the tube at a price Krisbergh has pegged at $4.95 a month. In contrast, a rival Microsoft product aimed at television Internet use called WebTV must be purchased for several hundred dollars.

Extending the concept two to five years out, advertisers are salivating at a critical piece of the Worldgate vision called "channel hyperlinking." If this concept takes off, a television viewer instructed by an anchor to visit a Web site to learn more about sharks will push a button on the Worldgate remote control and see that page onscreen in less than three seconds. The speed comes from two factors: Over a cable modem, the Internet is always on at blinding speeds—just like broadcast television. And the set-top box will be smart enough to know that if you're watching *National Geographic*'s sharks special, it should go out and load the relevant Web page ahead of time, a process known as "caching."

Advertisers love this concept because it will work the same way for a 30-second spot on, say, the latest John Grisham novel. A push of the button, and consumers can learn more about the product, see an online video interview with their hero, enter a contest, and even order the book—the cost will show up on their cable bill.

David Harkness, a vice president at the media metrics firm A.C. Nielsen Corp., says he believes advertisers and TV programmers will take readily to channel hyperlinking—thereby pushing the two media together faster—because it strongly enhances the value proposition of a broadcast-media buy. Currently, networks charge a flat $12 to $16 per thousand viewers for an ad in prime time, but Harkness believes they will be able to charge far more if the advertisers know they can make a sale on the spot. In addition, a record of all that linking will help both networks and advertisers understand consumers in minute detail.

"Right now, we can't tell Dell Computer which TV programs are going to have the highest propensity to deliver people who are going to buy computers online," Harkness says. "But by 2002, we'll know the answer with great precision."

> "In whatever delivery form, news and entertainment are going to be much more personalized over the next five years."
>
> —GEORGE BELL, CEO, EXCITE INC.

Of course, there is a catch: Internet content, which is largely dependent on text, looks like mud soup on a standard interlaced television screen. It will improve quite a bit on new high-definition TV sets running off a digital feed, but will still compare unfavorably to the average 15-inch computer monitor. And the television is such a dumb beast, even with a set-top box on its shoulders supplying meager brains.

The difficulty of reading text on TV—or a computer monitor, for that matter—creates a nice opening for the survival of newspapers and magazines. Even in 2002, says Jack Driscoll, editor-in-residence at the Massachusetts Institute of Technology's

PLUG IN!

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5-Year Outlook

Media Lab, folks are still likely to be reading headlines on paper in the morning with their coffee and toast.

The problem, says Driscoll, the former editor of the *Boston Globe*, is that newspapers might not make it to 2010 in their current state because "the process of whittling away will be well under way." Despite the fact that people will continue to want the tactile quality of leafing through a newspaper, he believes that advertisers will increasingly undercut the medium by fleeing to more direct means of communicating with customers. One solution: Highly personalized, downloadable newspaper "books" created with digital ink and acetate-like paper now under development in the Media Lab's engineering workshop.

Projected Ad Expenditures for 2001 (\$ millions)

	1996 Gross Expenditures	2001 Gross Expenditures	1996-2001 Compound Annual Growth
TV Networks	\$13,650	\$17,300	4.9%
TV Stations	20,747	26,700	5.2
Radio	12,269	18,950	9.1
Cable	6,775	14,900	17.1
Syndication	1,780	2,120	3.6
Newspapers	38,179	53,800	7.1
Consumer Magazines	9,010	13,200	7.9
Trade Magazines	6,528	9,700	8.2
Interactive	200	2,500	65.7
Outdoor	1,963	2,550	5.4

Source: Veronis, Suhler & Associates

Paul Janensch, professor of mass communications at Quinnipiac College in Hamden, Conn., and former top editor at three newspapers, forecasts that during the next five years the most successful news organizations will be ones that are diversified across all media, have a global rather than a merely local orientation and create original content rather than hunker down as a distributor of warmed-over wire copy.

"When it comes to forecasting the future for news, nobody knows anything," Janensch says. "It's like roulette: If you want to win, you've got to bet a lot of numbers."

Among the diversified media giants spinning the wheel effectively so far is Cox Enterprises Inc. in Atlanta. The company owns five large newspapers, 12 television stations, 45 radio stations and the fifth-largest cable TV operator in the country. The firm's newest baby, Cox Interactive Media Inc., has been given the sole responsibility for creating Web sites in the company's key markets that protect, unify, promote and extend the mother firm's other properties in the new medium.

Peter Winter, president of Cox Interactive, has set an ambitious goal of becoming the No. 1 local Web site in terms of audience and advertising share in 25 U.S. markets by 2002. The first four efforts in Atlanta, Austin, Texas, San Francisco and Charlotte, N.C., do show promise: The highly localized sites (including www.austin360.com and www.gocarolinas.com) are attractive and appear to have grown organically from roots in radio, television and print into a useful hybrid.

"Cox spun radio out of newspapers, TV out of radio and cable TV out of broadcast TV," observes Winter. "We have a history of mobilizing quickly when a new media comes along and building a significant presence. We aren't constrained by any artificial expectations of quick profitability."

Few other mainstream media companies have jumped so far so fast. One is NBC, a unit of General Electric Co., which formed a joint venture with Microsoft Corp. to create a powerful cross-media brand out of the MSNBC cable network, MSNBC Web site and MSNBC desktop business video service. The joint venture has leaned on the software strengths of its Redmond, Wash., partner to develop numerous user-engaging innovations, such as a voting device that lets readers recommend articles to each other, a charting engine that conjures up complex graphics of newsmaking stocks and occasional audio and video news clips.

Cal Vornberger, chief executive of Tumble Interactive, a new-media design agency in New York, believes that the trick for the networks in the next five years will be to do more of what NBC is doing: They must become fully interactive with their viewers through the Web. In research for ABC Television, he counted 50 wildcat Internet sites devoted to the network's shows, including six for *Home Improvement* alone. This community-building function should be taken over by the network for fun and profit, he proposes, as greater viewer loyalty will pay off in valuable rating share increases.

In the end, suggests corporate-image consultant Katharine Paine, the coolest business of all in the year 2002 might be one that would allow consumers to turn all these electronic media and messages off—a filter that will blunt all advertisers' attempts to grab your eyes and ears via television or radio in the car, office or home.

But there is an inherent danger to that see-no-evil approach, she says with a wink. Consider the story that she tells about her late father, Ralph Delahaye Paine, the longtime publisher of *Fortune* magazine, and his boss at Time Inc., the legendary print-media empire builder Henry Luce. In 1968, she says, Luce turned to her dad and complained: "Del, why didn't you ever tell me about television?" ■

Markman is managing editor of Microsoft Investor, an investment news and analysis publication on the Web at http://investor.com. He can be contacted at jonmark@microsoft.com.

Movers

AGENCIES

Carol Grisham has rejoined D'Arcy Masius Benton & Bowles in St. Louis as an assistant media director in the Coca-Cola media unit. She had been at DMB&B/St. Louis for 15 years before signing on with Maritz Performance Improvement Co., also in St. Louis.

MAGAZINES

Nancy Landsman Berger, formerly ad director at *Vanity Fair*, has been named associate publisher.

CABLE

CNBC named Peter Danielsen to be its new vp of marketing, overseeing all on-air promotions, graphic design and consumer marketing. He comes over from MTV Networks, where he was vp of marketing communications...The Food Network has hired Patricia Melton as its vp of marketing and promotions. She comes from a similar position at Channel One Network...Discovery Communications has named Dara Altman to the new position of senior vp of business affairs, in charge of maximizing the company's cable programming assets in its multimedia and online units. She comes from Reiss Media Enterprises where she was senior vp and general counsel...MTV has named Brian Graden to the new position of executive vp of TV programming, which will have him supervise all series development and production, both current and new. He comes over from Foxlab, where he was senior vp.

The Media Elite

Edited by Anne Torpey-Kemph

No Blues Sung Here

Bring together a child psychology research expert, an animator and a veteran kids TV producer and what do you get? *Blue's Clues*, a computer-generated show with a live host that's turned into the most successful preschool kids show on cable. It was cocreated by Todd Kessler (who's executive producer), Angela Santomero, a researcher who has found the chance to stretch her creative wings (as cocreator and head writer) and Traci Paige Johnson, whose animation experience has helped *Blue's Clues* push the envelope in cutting edge computer graphics that incorporate all sorts of traditional kids media (pipe cleaners, clay and construction paper). *Blue's Clues* has become the signature show of the Nick Jr. programming block.

"Brown Johnson [head of Nick Jr.] wanted to do a game show," explains Kessler, who was helping develop the Nick Jr. block, which runs from 9 a.m. to 2 p.m. "I proposed a more research-based and educational-based show and Brown got excited about it," adds Santomero. "I showed my ideas to Todd and then we brought Traci in."

"Then we sat in a room for a month to figure it out," throws in Johnson, the principal animator. "We all came to it from different angles but with the same vision."

That vision, per Santomero: "The show embodies learning through play. Everything's a problem, but it's a game too."

The show nets a 10 rating among kids 2 to 5 and ranks among the top 10 Nickelodeon shows in households. It also has attracted a college cult audience, according to the three producers.

Go figure. *—Michael Bürgi*

Traci Paige Johnson (left), and Angela Santomero (below), come up with ideas.

Todd Kessler (above), executive producer, makes their ideas into a TV show.

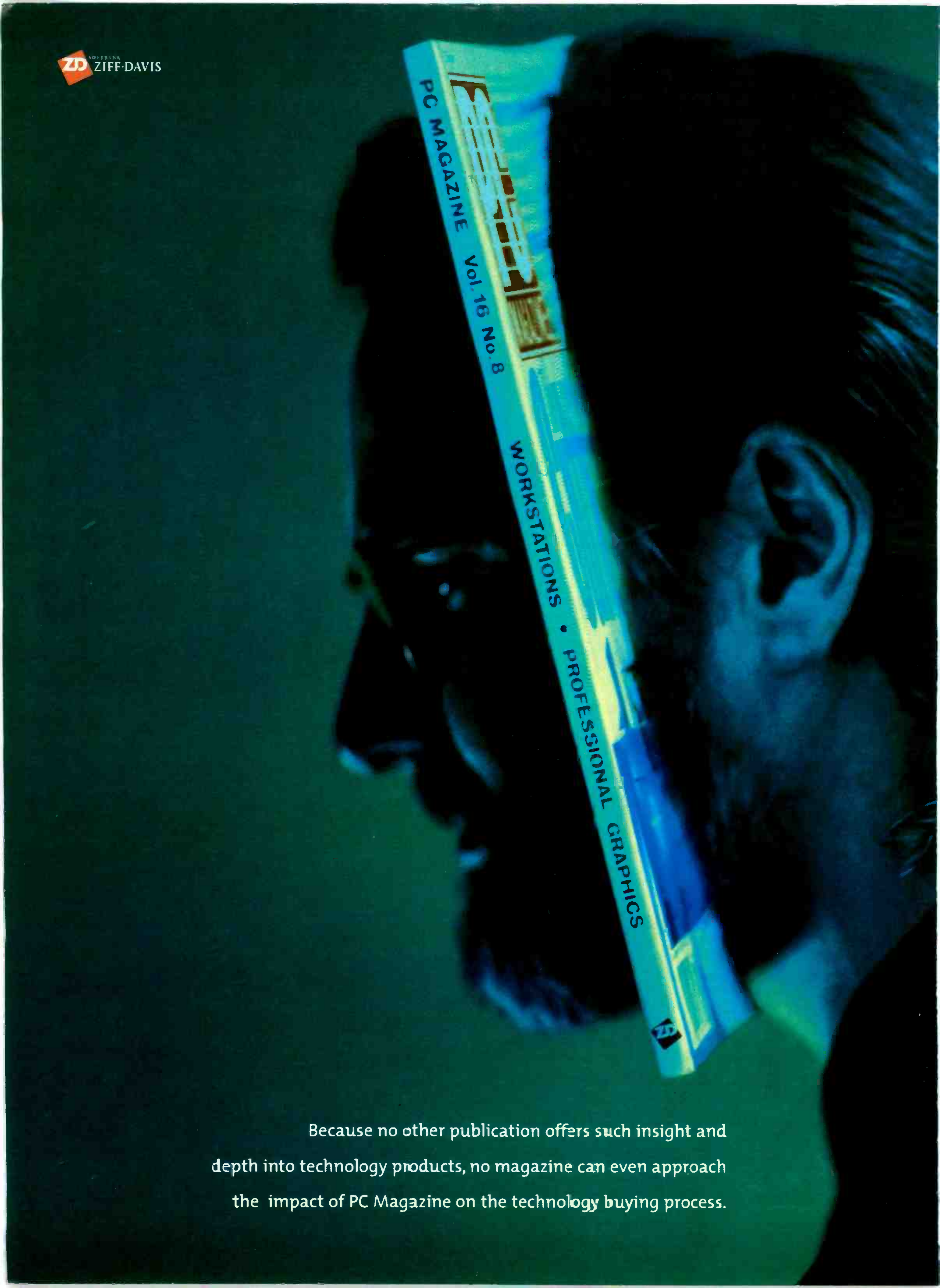
Martha, She Wrote, May Be Looking at Estate on Maine Coast

The *Bangor* (Me.) *Daily News'* Letitia Baldwin reports that Martha Stewart, whose ubiquity in print and on TV (and in this magazine) was augmented last week by an appearance as a guest presenter at the MTV Video Music Awards, is looking for a place to hide. Seems Ms. Stewart has been said by townspeople in Seal Harbor on Mt. Desert Island to be looking at the old Edsel B. Ford Estate, a place called Skylands that is crafted of pink granite with a dozen bedrooms, a wine cellar and an English pub. The paper reports that no change in deed has been registered, but the local postmaster is already accepting mail.

Susan Magrino, the publicist for Stewart, would not comment on the report.

Downeasters are generally used to celebs summering in their midst; John Travolta has a place on nearby Isleboro Island; David Rockefeller, Jr. and Brooke Astor have places on Mt. Desert; and FDR used to summer off the Maine Coast. Locals pretty much ignore anyone with whom they have no business. Several people interviewed by the *Bangor News* said they would welcome Stewart. But the locals also are somewhat concerned that the glitz and *schmutz* of the Hamptons, where Stewart currently has a place, could follow her north.

Thus, should Martha move, the glitterati should take note: It can get very cold in Maine.*–W.G.*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MEDIA DISH

The One that Got Away Isn't in this Picture

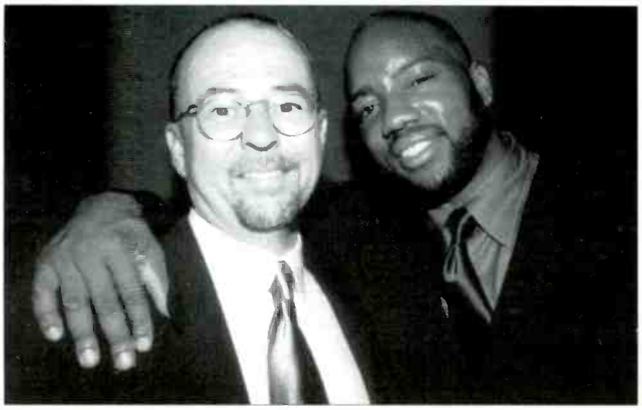
Inc. Magazine recently took a crew of clients fishing in Long Island Sound, with apparent success. L to R: Ralph Garcia, IBM; Chris Finn, Citigate Albert Frank; Chris Abelt, Met Life; Jim Tricarico, *Inc.*; and Jon Chalon, *Inc.*

Hungry? Talk to the Guy with the Chef's Hat

Food & Wine last month hosted clients at a pre opening party at the Union Pacific Restaurant in Manhattan. L to R: Julie McGowan, *F&W* vp/publisher; Rocco DiSpirito, Union Pacific Executive Chef/partner; Dana Cowin, *F&W* editor in chief.

Dear Mom: Send Lawyers, Guns and Money

After the world premiere of the movie *Cop Land*, *Esquire* editor-in-chief David Granger strikes a sinister pose with Malik Yoba, star of the Fox network's *New York Undercover* at The Supper Club in Manhattan.



Get the Gaffer Up Here, Stat!

Currently nominated for 22 Emmy Awards, NBC's *ER* will not rest when it launches its fourth season with a live broadcast on Sept. 25. Live productions were common during the so-called golden age of television, but networks have been loathe to attempt a live drama in recent years. *ER*'s producers hope the complicated logistics and the excitement of actors performing on network TV with no net will result in an unforgettable episode.

"It's our goal to take the viewer on the kind of thrilling ride that only happens when a show is live," said executive producer Carol Flint. "We want to convey a sense of immediacy like a live baseball game where the bases are loaded and you don't know if the batter is going to strike out or hit a home run."

The telecast will require the use of 11 cameras: five hand-held, a remote and several locked-off stationary units. Other equipment needed for the show will include extra cable for auxiliary power, three different transmission pads to get the signal form Los Angeles to New York for broadcast and two different fiber-optic lines uplinked to the satellite.

What may make the production even more interesting is the twist that, between scenes, some actors will only have a minute to change wardrobe.

Entitled "Ambush," the live episode will center around a documentary film crew who spends a day in the ER, filming the daily activities of the doctors, nurses and patients.

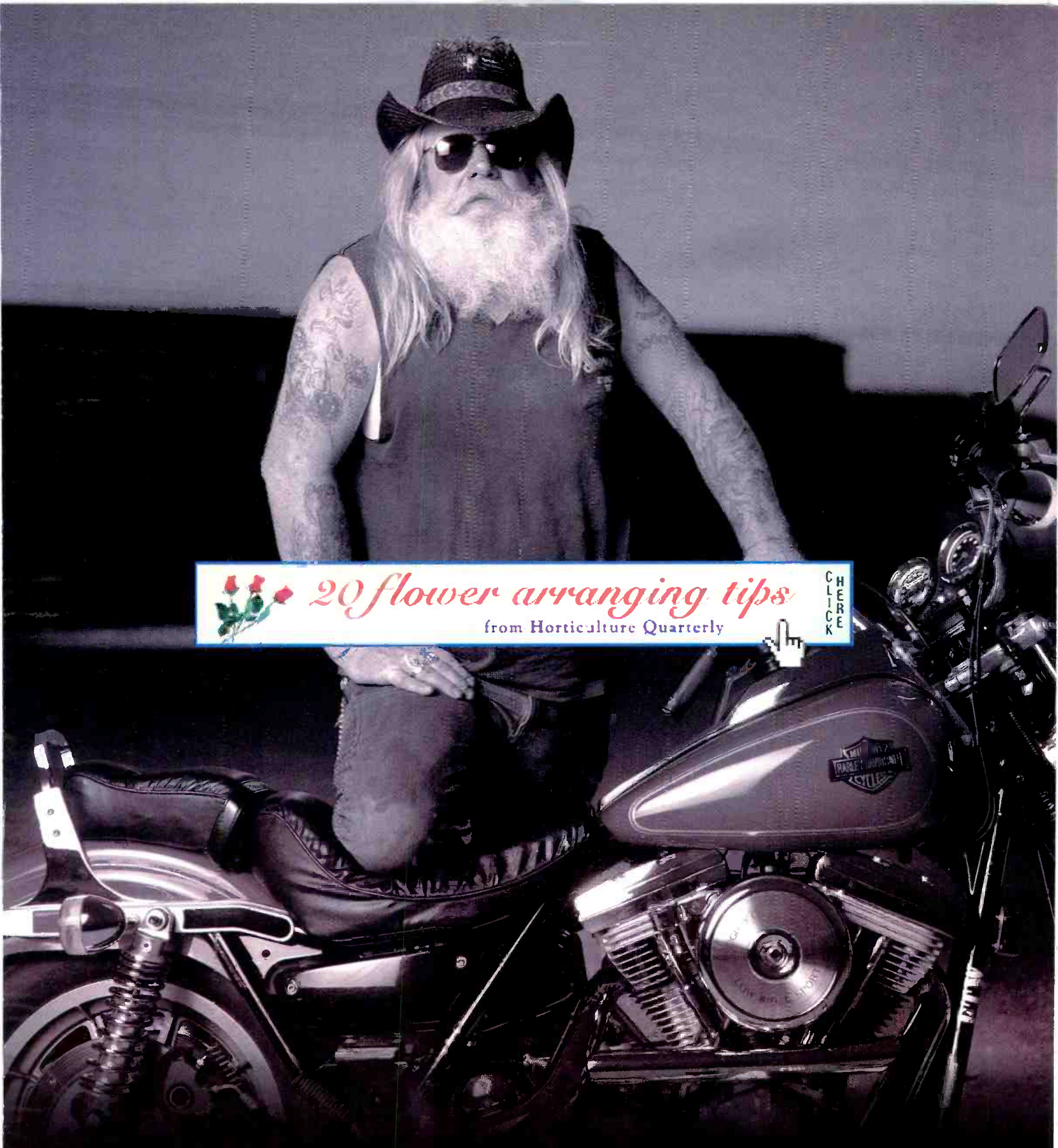
Said Flint, who wrote the episode, "We're working toward giving the audience an immediate thrill and a sense of the danger and the life- and-death situations that really happen in an ER," said Flint. The cast does hope to avoid rain. *–Richard Katz*

PAUL DRINKWATER/NBC

Weather or not: *ER*'s George Clooney carries Erik Von Detten in the rain.

Late Night Cinema from Buffalo?

Can three beatniks find happiness in late-night TV with a vault full of B movies from the 50s? Witness *Off Beat Cinema*, a popular fixture in Buffalo and Toronto for the past four years that is now in syndication, where it is finding a strong following in 50 other markets. Jim Gillan, who is president/creative director of Buffalo-based Paragon Advertising, had the help of John DiSciullo, promotion director of Granite Broadcasting's WKBW in Buffalo, in launching *Off Beat Cinema* four years ago as a replacement for the infomercials holding TV viewers hostage in late night. The two-hour film showcase is hosted by a trio of 1950's-era beatniks set in a trendy coffee house. "Looking around today, there are very few TV stations running classic movies, let alone *film noir* classics from France, Germany and the U.S.," said DiScuillo. "To find these off-the-beaten-path titles, many of which can't be found in video stores, is what really makes this show appealing." *–M. Freeman*



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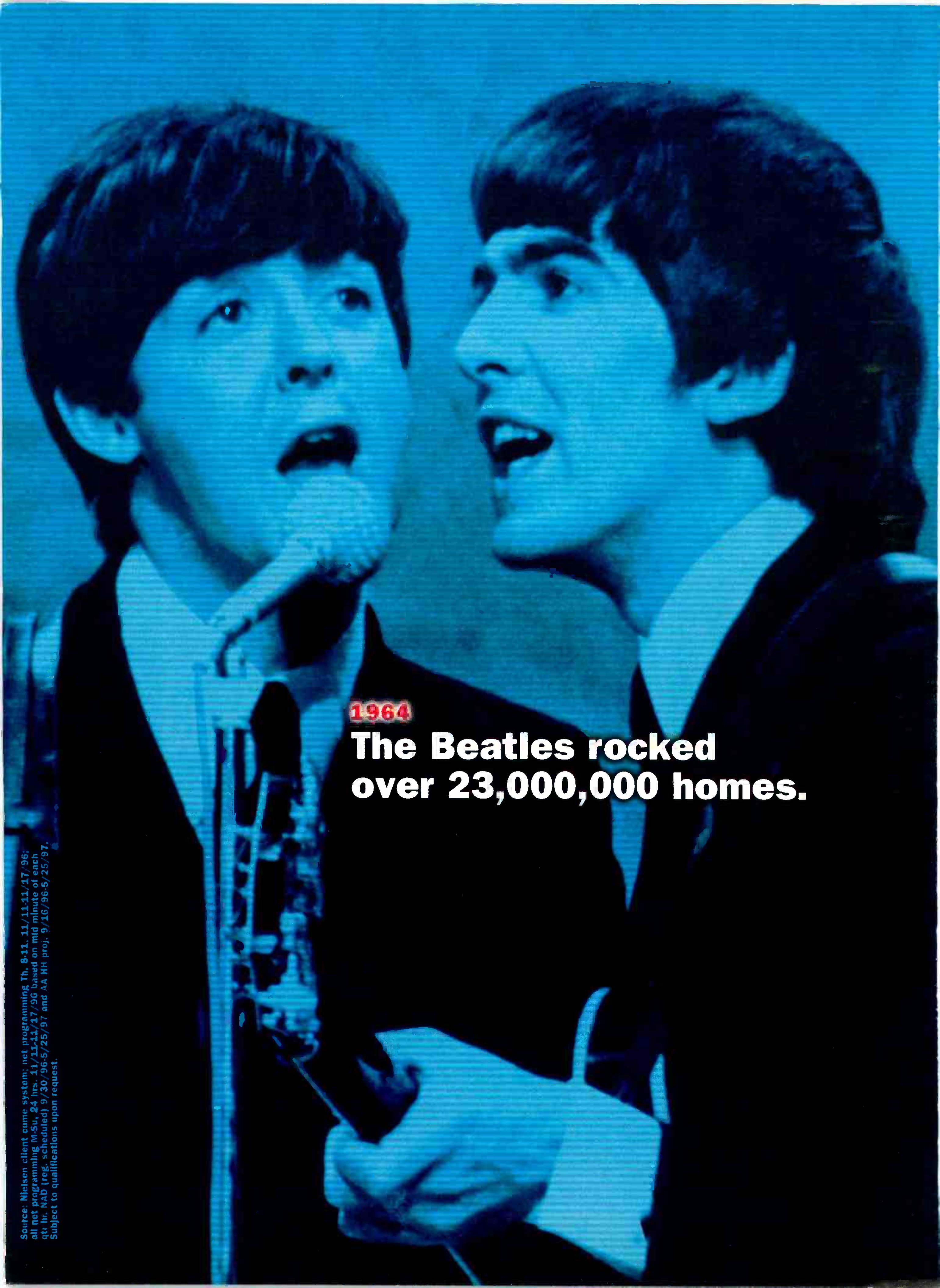
1964
The Beatles rocked
over 23,000,000 homes.
Source: Nielsen client cume system; net programming Th. 8-11. 11/11-11/17/96;
all net programming M-Su, 24 hrs. 11/11-11/17/96 based on mid minute of each
qtr hr. NAD (reg. scheduled) 9/30/96-5/25/97 and AA HH proj. 9/16/96-5/25/97.
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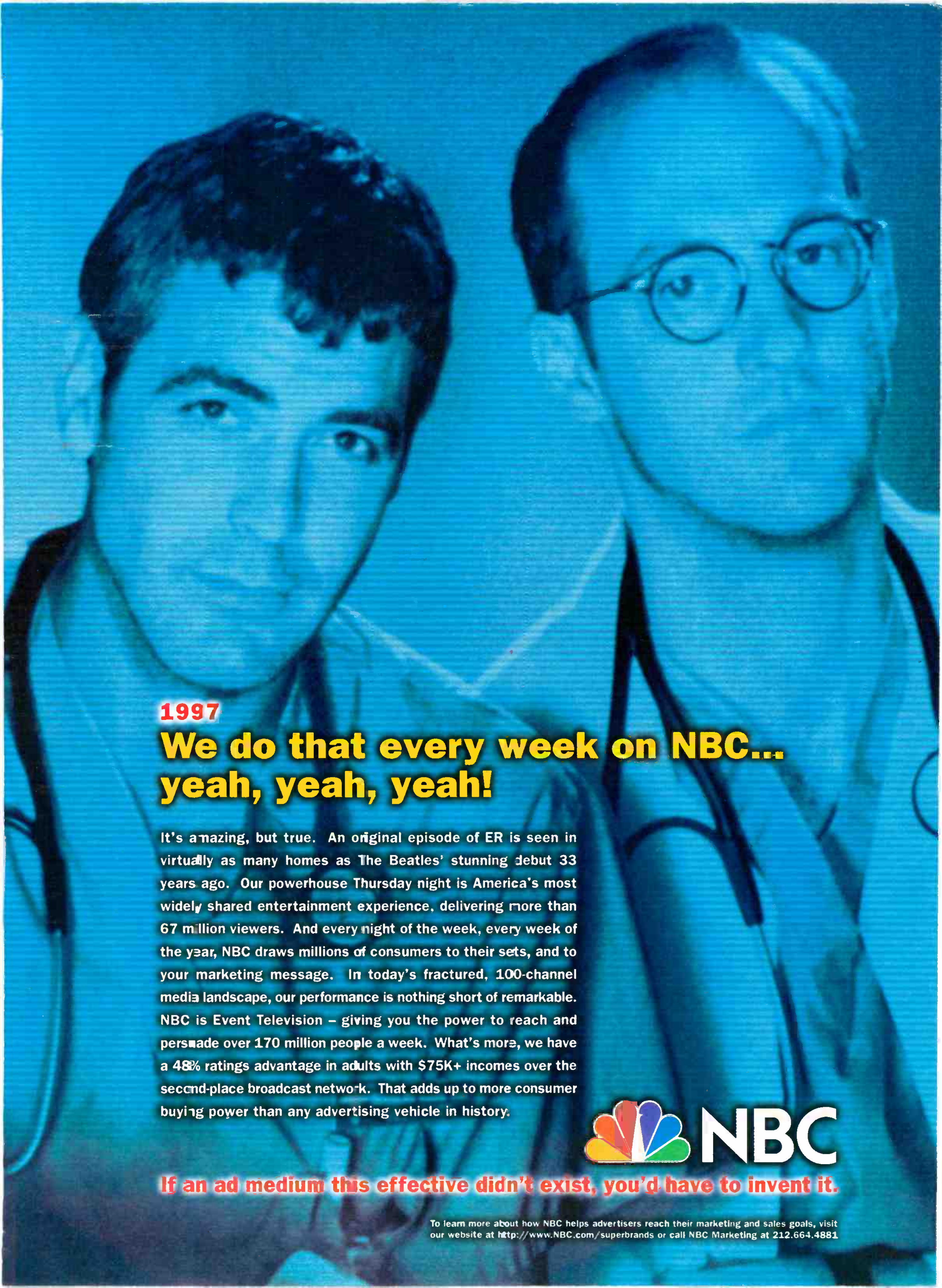

1997
We do that every week on NBC...
yeah, yeah, yeah!
It's amazing, but true. An original episode of ER is seen in virtually as many homes as The Beatles' stunning debut 33 years ago. Our powerhouse Thursday night is America's most widely shared entertainment experience, delivering more than 67 million viewers. And every night of the week, every week of the year, NBC draws millions of consumers to their sets, and to your marketing message. In today's fractured, 100-channel media landscape, our performance is nothing short of remarkable. NBC is Event Television – giving you the power to reach and persuade over 170 million people a week. What's more, we have a 48% ratings advantage in adults with $75K+ incomes over the second-place broadcast network. That adds up to more consumer buying power than any advertising vehicle in history.
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To learn more about how NBC helps advertisers reach their marketing and sales goals, visit our website at http://www.NBC.com/superbrands or call NBC Marketing at 212.664.4881

iQ NEWS

On the chopping Block this week is long-suffering CompuServe. An LBO firm was reported close to acquiring the service from its parent, tax prep giant H&R Block. Although CompuServe was the first full-scale online network (founded in the Paleolithic early 1980s) its lead time didn't help it. Nor did its product offerings, which many claimed were better than that upstart AOL. What it lacked was smart marketing and customer response—a lesson familiar in the tech and Web industries.—*Eric Garland*

@deadline

Organic Wins Nike Biz

Organic Online, San Francisco, has been named interactive agency of record by **Nike**, Beaverton, Ore., without a formal review. The Communicade agency will develop a "structure that allows for outside partners," said Organic. No partners, in technological or creative fields, have yet been named.

CNN's Traffic Boost

Media around the world saw huge boosts in audiences as they covered the news of Princess Diana's death over Labor Day weekend. It was no different online. CNN Interactive reported a three-day total of 23.3 million page views starting Aug. 31, compared to its usual traffic of 39 million page views per week.

Gap's Virtual Fashion

The Gap unveiled a virtual product launch last week for its new finger polish line, Gap Colors. Dubbed e-nails, users sampled shades within gap.com. The Gap intends to introduce a new fragrance, Gap Blue, later this month with a similar virtual launch

DoubleClick Exec Out

David Henderson, vp, North American ad sales for **DoubleClick**, was terminated on Wednesday for undisclosed reasons, according to Kevin Ryan, president of DoubleClick. Henderson had been with DoubleClick since its launch in early 1996 and helped take the company to a leading position in online advertising sales.

That's Entertainment: AOL Goes After the E! Audience

By Anya Sacharow

The entertainment and pop culture field on the Web is about to get even more crowded. Next month, America Online's Greenhouse Networks will go after E! Online's market when it launches Entertainment Asylum both on the Web (www.asylum.com) and on its AOL service. The site will focus on real-time, behind-the-scenes coverage of stars and shows—the format E! Television was built on—as well as offer a personalized movie database similar to E! Online's Moviefinder.com.

Monica Dodi, ceo of AOL's new site, says Hollywood is ripe for online deals.

The site is the brainchild of the late Brandon Tartikoff, who was chairman of Entertainment Asylum, and Scott Zakarin, president of programming, who created the online soap The Spot. Monica Dodi, a co-founder of MTV Europe who also helped restructure Walt Disney Co.'s consumer products business in Europe, has been named chief executive of the venture. "Brandon worked with us creatively to create a blueprint, and the vision is done," Zakarin said. "Now we're executing it. He had wonderful ideas, and we'll miss him."

Part of Tartikoff's vision for the online medium, Zakarin noted, was to involve the audience in story-telling and use the immediacy of online users' reactions to influence programming. "We said, what if we could leverage the interactivity online with the biggest stars and studios?"

The competition between E! Online and Entertainment Asylum for advertising will largely be fought over movie tie-ins. E! Online has struck several deals with major studios, such as an interactive promotion in August with PolyGram Films for the thriller *The Game* that included a contest, banners and tickets on Moviefinder.com. "Hollywood sees a potential for developing on the Web, but they don't have the traffic or the real estate to develop their properties online," Dodi said.

E! Online is expected to announce a one-year, 10-picture advertising deal with Sony Pictures this week. Jeremy Verba, president of E! Online, stressed the competitive advantage of cross-promoting the E! Web site on its cable network. "There's a clear call to action for viewers from the TV network to online and vice versa," he said. "There's a symbiotic relationship." Instead of a television audience, AOL can deploy its 9-million subscriber base to lure studios and networks as sponsors. ■

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bits

▶San Mateo, Calif.-based **Electronic Arts** saw a mammoth surge in traffic at its **EA Sports** site, coinciding with the Aug. 26 launch of *Madden NFL 98*. During the last week in August, the site had 96,797 visitors, up 32% from the previous week, the company reported.

▶**Amazon.com** and **Prodigy Services Corp.** have signed a deal that makes the online merchant the exclusive bookseller on Prodigy's Shopping Network (www.shopnet.prodigy.com). The deal follows similar agreements with **Yahoo!** and **Excite**.

▶**AT&T**, Basking Ridge, N.J., last week launched an animated campaign using technology from **Narrative Communications**, Waltham, Mass., that allowed AT&T agency **Modem Media**, Westport, Conn., to adapt the telco's TV campaign for the Web.

▶As expected, Martha Stewart's first Web site, www.marthastewart.com, launches today as her TV show, *Martha Stewart Living*, goes daily and her radio show, Ask Martha, begins its syndication run. The site was created by **US Interactive**, New York.

▶**The Walt Disney Co.** reorganized its Internet businesses last week under a new unit called **Buena Vista Internet Services**. Jake Winebaum, president of **Disney Online**, was named president of the new group, which now includes Starwave properties **ESPN SportsZone** and **ABCNews.com**.

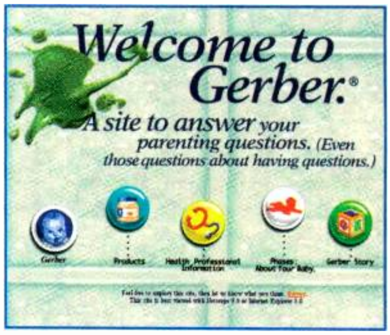
▶**Netscape Communications**, Mountain View, Calif., last week unveiled a free online service called Netscape Netcenter, aimed at business users. Netcenter will require registration before downloading the software, which will offer business-related content and interactive areas.

▶**Foster's Beer** launched a redesign of its five-month old Web site last week. The new site was developed by **Strategic Marketing Resources**, Norwalk, Conn., and **Magnum Resources**, Cheshire, Conn. The site has been supported by banner links on **America Online**. More online buys are planned, likely on Australian culture sites.

▶As part of its sponsorship of the **National Collegiate Athletic Association**'s college football, **GTE**, with FANSonly, has introduced a Web site (www.fansonly.com/roadtrip) that has audio feeds and pre- and post-game chats hosted by **ESPN** on-air personality Chris Fowler. The site is an interactive component of the company's 12-city promotional tour, GTE Road Trip.

Gerber Toddles Onto Web With Parenting Site

BY BERNHARD WARNER—The push for parents' eyeballs is intensifying among marketers keen on feeding and clothing their kids. Last week, Gerber Products Co. relaunched its site to give it a more consumer-friendly look and feel. The Fremont, Mich. baby food maker is the latest in a parade of companies that have built and promoted their Web sites as authoritative parenting guides. Others include Gerber's primary competitor in the baby food aisle, Beech-Nut Nutrition Corp., plus Procter & Gamble's ParentTime and the Pampers Parenting Institute.



The revamped Gerber site goes the editorial route, aimed at young parents.

As general Web usage at home climbs—and as more women in particular go online—young parents have become the focus of many online marketing strategies and sites. But the tactic of companies designing brand sites that resemble online publications has its doubters. "The idea that Gerber is going to become a destination for children's health care information" won't work, said Forrester Research analyst Bill Bass.

Gerber made its Web debut in fall 1995 with a site aimed mainly at pediatricians "because the professional health care community is accustomed to getting information via the Web," said Barbara Ivens, the company's director of professional information. The original gerber.com was considered a pilot venture that received little promotional support.

The revamped site, designed by The Martin Agency, Richmond, Va., includes sections on infant feeding and growth, recent issues of the *Journal of Pediatric Nutrition & Development* and a baby registration form that allows Gerber to e-mail tips to parents. Visitors are also greeted by a characteristically unappetizing splat of green baby food on a tile floor background. Ivens claims the site has an edge over rivals because of its emphasis on toddler diets.

To spur traffic, Gerber has bought keywords based on "infants" and "nutrition" on leading search engines. The company is mulling the placement of its URL on its packaging and ads as well as online buys of banners and sponsorships. "We're still investigating that," Ivens said. "Like babies, we have to crawl before we can walk." ■

Bell Atlantic and Nynex Put Online Merger on Hold

BY LAURA RICH—With the completion of the Bell Atlantic and Nynex merger, among the many details to sort is the direction and management of the telcos' online activities. Bell Atlantic chief executive Ray Smith has laid out a consolidation plan for the main services and products of the companies, so their interactive sides should be ripe for sorting out. Or not.

"Never say never, but we like to have different skill sets and different opinions," said a Bell Atlantic official of potential interactive combinations.

For now, the online advertising for Nynex and Bell Atlantic services will remain with the agency that handles its media advertising. In special cases, new media shops will be called in to carry out a campaign. Internally, the company's advertising department, headed by Jan Keeler, will lead online sponsorship efforts, except where the operating units themselves prefer to handle the advertising.

Bell Atlantic's Internet division, which falls under its Information Services Group, will focus on electronic commerce and BigYellow, the online directory launched by Nynex in 1996. The site is now called Bell Atlantic BigYellow. Since its start, an average of $2 million per year in online ads have supported BigYellow. Easton Media Group, based in Easton, Conn., does BigYellow's online media placement and strategic alliances.

Last month, Saatchi & Saatchi resigned the main Bell Atlantic consumer account. But its new media unit, Darwin Digital, retains two Bell Atlantic online clients, for its network solutions and small business divisions. Bell Atlantic has said it will parcel out general media and account service assignments to a variety of shops. ■

Dynamically targeted advertising

USER PROFILE

mac user - student in california - uses altavista

You hear so much

about the innovative ways the Web can help strengthen your marketing efforts. Creating personal connections that are unheard of in any other medium. Is it hype? Can you actually reach your market more effectively? Here are two leading companies that are using the unique marketing tools of the Web.

3M Visual Systems

To generate qualified leads for a Multimedia Projector, 3M initiated a targeted Web ad campaign. Prospects who work in software, Internet, media, advertising, marketing, publishing and training companies were targeted. Ad banner creative was directed at the different audiences and unique sites. The results were impressive. Before the campaign, the forms on 3M's Web site generated 10 to 15 responses per week. With the targeted campaign, 1,850 leads were generated in a month, of which 78% were qualified Web-generated leads.

IBM Recruitment

The objective was to have students schedule interviews with IBM recruiters. The online campaign served an ad to all students exactly two weeks prior to IBM's scheduled campus visit. Ads were targeted at over 300 specific colleges and universities. Over 750,000 ads were served in the first month. The first ad impression generated response rates of up to 30%.

The impetus behind these two success stories is DoubleClick's DART™ (Dynamic Advertising Reporting and Targeting) technology. An innovation in target marketing that allows for dynamic delivery of Web advertising.

Imagine reading a magazine in which the ads are based on your interests, where you live and what you do. DART gives you that capability. When a person visits a DART-enabled site (either a site within the DoubleClick Network or a site that has licensed DART), DoubleClick assembles a profile on that individual. Where the person is located, the domain (.edu, .com, etc.), the industry the person works in. Over 10 variables are recognized. Based on the profile, an appropriate ad is displayed in milliseconds.

DoubleClick has delivered a billion and a half ads to more than 26 million unique users. Because we recognize unique users, you can control frequency. We can tell how many times your potential customer has seen your ad and when it becomes ineffective. This usually occurs after the fourth impression, at which time the ad can be replaced with new creative. In no other medium can you control how many times an individual sees your message.

Connect with your audience. Deliver relevant ads.

Doubleclick's DART is becoming the standard for targeting, tracking and reporting online ad campaigns. To find out more call **www.doubleclick.net or call 1 888.727.5300, code dc58.**

Building one-to-one relationships millions at a time℠

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NY Times Drops Back from NCN

While one of its founders is scaling back, New Century Network is forging ahead with a search for a new editor for its NewsWorks site and the launch of Home Page, an area dedicated to local sports coverage. The 2-year-old NCN, designed to help get local newspapers a national online audience and ads, has financing from major newspaper publishers, including Gannett, Knight-Ridder, The Tribune Co., Times Mirror and The New York Times Co.

The *Times* now intends to put more effort into its own online ventures, mainly its *Times* Web site and its area on AOL. "We have funding from nine different companies, and the *Times* said they wanted to have a little bit lower percentage of ownership," said Tom Bates, senior vice president of advertising at New Century Network.

The *Times*, said a source close to NCN, "never really wanted to be part of [NCN] because they wanted to be national." NCN sells online advertising for its 130 affiliates, including the newspapers owned by the nine publishers and other papers represented on NewsWorks. "With all this stuff about local [online content], your local newspaper stands for something," observed Greg Smith, director of strategic services at Darwin Digital, New York.

NCN has attracted ads from Intel, Barnes & Noble and CDNow. Its biggest sponsor, IBM, signed on exclusively for Home Page. The college sports news area will be syndicated in the form of banners to participating local newspaper sites. To build awareness, a consumer ad campaign is planned for the fall, from US Interactive.

Meanwhile, a search is on for a successor to NewsWorks editor John Papanek, who departed to run Disney's new *ESPN Magazine*. "I'm leaving with a lot of mixed feelings about it," said Papanek. —*LR*

IQ movers

T.R. "Rocky" Shepard III, former publisher of *Redbook*, was named vp, network ad sales, at Hearst's HomeArts Network. . . . **David Lalich** has joined online classifieds network AdOne as president and CEO. Lalich was president of Reuters' AdValue. . . . BoxTop Interactive, Los Angeles, has named **Chuck Copin** senior vp, sales and marketing. Copin was executive vp, North America, of Asatsu/BBDO. . . . **John Oberg**, who was sponsorship and ad sales director at CBS Sportsline, has joined online gamer Simutronics, Rockville, Md., as ad director. . . . **George Douaire** has been promoted to vp of Peapod Interactive, Skokie, Ill, from director of sponsorship and media sales.

A.P. BATT

INSIDER

FLESHING OUT THE WEB

By Anya Sacharow

Seth Warshavsky's cell phone rings every two or three minutes. The 24-year-old Internet mogul exhibits stress beyond his years, intensely driven by the art of the deal and his goal of reaching $20 million in revenues this year. His company, Internet Entertainment Group, is surely one of the most lucrative Web publishers to date. The not-so-secret to his success: sex sells. IEG's offerings include *Penthouse*'s Web site, Club-Love.com, Sexxxvision.com, FreeLiveSex.com and Psychic-zone.com. Forthcoming sites are Formlawyer.com (tips for sex phone addicts on how to file for bankruptcy), an art auction site and a gambling site.

From his many sex sites, Warshavsky rakes in monthly $9.95 fees from users and pay-to-view fees of $29.95 per 15 minutes for live, streaming, steamy video. "It's a fact that sex is a product that sells," Warshavsky says calmly. "If you have a product that sells, you may as well take advantage of it. If I could sell toaster ovens, I'd sell toaster ovens."

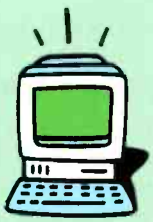
Warshavsky hardly looks the part of someone banking on the skin trade. He's a short, freckle-faced, clean-cut Gen-Xer who recently bought a boat and likes waterskiing but says he is bored when not working. He doesn't have a girlfriend. He started his entrepreneurial career at 13 when he ran a BBS called Dungeon Quest, an online game that charged $2 a month. At 16 he founded a clothing company called Urban Apparel. At 18 he opened a service bureau for phone sex called J&S Communications that claimed sales of $60 million by 1994. At 22 he and a partner invested $3.5 million to launch Candyland.com on the Web. The site is now called Club-Love.com after Hasbro sued him for using the name of its board game.

$20 million and counting for Warshavsky's sites.

Internet Entertainment Group resides in a loft building in downtown Seattle's Silicon Harbor, the district that's also home to Amazon.com. Warshavsky is constantly traveling to Los Angeles, Las Vegas and New York. He figures now is a good time for an IPO. "Technology stocks are still doing well. The Internet is an exciting place. We're one of the few Internet companies that's generating a profit."

As much as Warshavsky is bullish on the Web, he can't wait for interactive television. He's working on distribution deals with all the national cable providers. "When they move into interactive media distribution with high-speed cable Internet delivery," he says, "we want to be a major force." ■

The story of Maggie and InfoBeat.



Maggie turns on computer and opens e-mail.

Reads e-mail from InfoBeat reminding her of boss' birthday.

Sees ad for florist offering special on carnations.

Remembers boss is allergic to carnations.

Sends two dozen. Signs card from coworker.

InfoBeat delivers customized news and information, including weather, stocks, sports and entertainment, free to subscribers via e-mail. Allowing advertisers to directly target consumers. With InfoBeat, advertisers are actually invited into the subscriber's home or office. And on a daily basis. To find out more, visit www.infobeat.com/adinfo, call Eric Belcher at 310-792-7025, or e-mail ebelcher@infobeat.com.

Targeted online advertising through e-mail.

InfoBeat

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If the Shoe Fits . . .

Pro athletes start to play one-on-one with Web sites. By Bernhard Warner

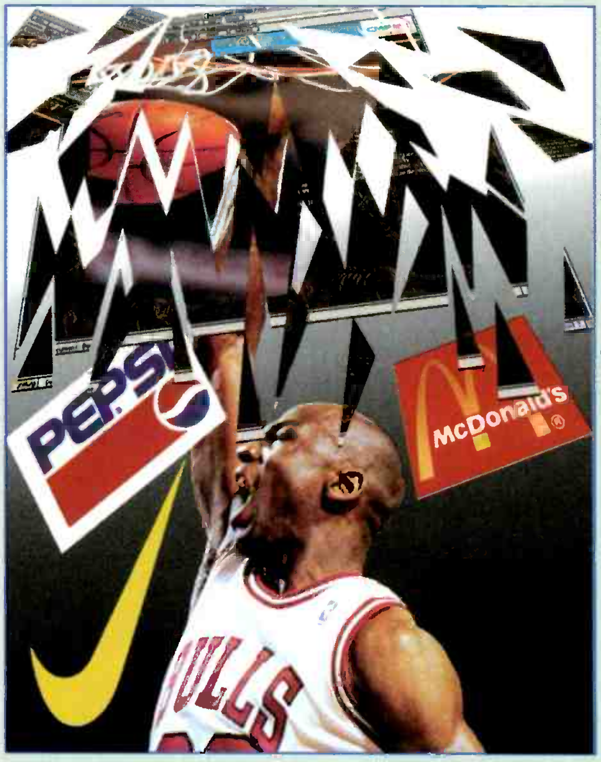
Going for the gold: Michael Jordan will soon launch his own site, joining dozens of other stars on the Web. But client conflicts could shatter some deals.

Cal and Shaq have one. Michael Jordan is getting one. Even John Daly and Bill Walton have them. While it doesn't yet hold the same status (or bank account heft) as an endorsement deal for an athletic shoe or soft drink, a personal Web site has become a new yardstick in the hyper-competitive world of star athletes. "What this really is is the fan club of the '90s," says Tom George, an agent who represents such marquee jocks as David Robinson and Steffi Graf.

But as more and more athletes try their hand at online publishing, many potential conflicts and questions arise.

For instance, will advertisers and sponsors pay for an untested concept? Can athletes find the time in their schedules to update their Web sites regularly and keep demanding fans interested? Will product category endorsement exclusivities—not to mention team and league image rights—be honored online? And can high-priced stars, their tenacious agents and cash-hungry Web publishers like SportsLine USA equitably divide up what little profit may be available in the early days?

Some skeptics view athlete sites as nothing more than electronic fan letters or a distribution channel for peddling schlocky merchandise. Others see the cachet of a star as a clever means of getting deep-pocketed advertisers onto the Net.



WILLIAM R. SALLAZ/DUOMO DIGITALLY MANIPULATED BY AMY GOLDBERG

One area publishers and agents agree upon is the need to retain category exclusivities online. The risk of alienating sponsors by monkeying with ongoing category exclusivities is not trivial. "You have to limit sponsorships to those brands you have an existing relationship with," says George, senior vice president of athlete marketing for Advantage International, McLean, Va. "You don't want to kill yourself in the real world, where the real dollars are."

George collaborated with Detroit Pistons star Grant Hill on a site that debuted last year. The site was profitable, George says, because it was "self-liquidating." GMC Trucks, a Hill endorsee, sponsored a sweepstakes on the site, which George says insured repeat traffic and upfront revenue.

Hill has since formed an internal marketing team to oversee his site and other sponsorship deals. His site is currently sponsored by athletic shoe maker Fila, which has made him a focal point of its online and offline promotions.

Just because athletes are offering personal sites doesn't mean advertisers will follow them to the Net, however. In order to cash in on a star's appeal, the athletes themselves, with their agents' support, have to perform like publishers.

Thought of the day.

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That means that sometime this fall, someone will become the ***1,000,000th GeoCities Homesteader.***

The closest guess to the exact ***date and time*** will win a penny for each and every Homesteader.**

That's **$10,000**! (Or win an equivalent value trip to the real GeoCities neighborhood of your choice.)

Go to **www.geocities.com/features/contest/million.** Get today's exact number of Homesteaders, use that figure to make your calculations, and then enter your guess.

Or, fax your name, title, phone # and e-mail address along with your guess to (310) 664-6520. Guess correctly and we won't be the only ones celebrating.

GEOCITIES

www.geocities.com/features/contest/million

* *PC Meter, June '97*

** *The closest guess to the actual time and date will win. Contest will have only one winner. In the event of a tie, the winner will be chosen by random drawing. You may also send your entry on a 3x5 card with your name and address to GeoCities at 1918 Main Street, Santa Monica, CA 90405. No purchase necessary. Void where prohibited. See official rules at www.geocities.com/features/contest/million. Entries must be received by midnight, 9/26/97.*

iQ NEWS

"The biggest thing about these sites is the frequency of updates," says Tom Hagopian, president and chief operating officer of InterZine Productions, which produces such sports sites as iGolf and iRace. "It's not just a site that looks good; it's the care and feeding of it."

When he worked at ESPN SportsZone, Hagopian was approached by agents who were interested in getting the prowess of SportsZone and its interactive partner, Starwave, behind their clients' online ventures. Hagopian was skeptical then and remains so today.

"You can go to a lot of these vanity sites and find out a lot about a subject," Hagopian says. "But they [need to be] living, breathing publications. People want interaction. And the more popular these guys are, the less time they'll have" for fans who log onto the site.

"Content is king, and that's what it will come down to," agrees John Vail, director of new media technologies at PepsiCo, in describing the athlete sites the soft drink giant intends to support.

Today, most athlete sites resemble mail-order catalogs where the rabid fan can buy a $70 Shaquille O'Neal mesh long-sleeve shirt or a $459 lithograph of John Daly hitting out of a sand trap at St. Andrew's Golf Club in Scotland. While merchandise revenue trickles in, the bulk of potential earnings comes from selling advertising and sponsorships on the sites.

SportsLine USA put up its first crop of 15 athlete sites without an immediate profit in mind, says Kenneth Dotson, vice president of marketing. SportsLine builds, markets and maintains athlete sites and has a pipeline into big-name stars through an affiliation with leading rep firm International Management Group. Only recently has SportsLine become more aggressive about securing sponsors for the sites. "Those who want to be on the site will pay because that's what our revenue model is," Dotson says.

One encouraging sign is the notoriously reluctant Pepsi agreeing to pay SportsLine to sponsor the Shaq World site. The sponsorship remains Pepsi's sole online buy to date. Pepsi has promoted a number of O'Neal's off-the-court endeavors, including his latest film, *Steel*, on pepsi.com.

"People want interaction. The more popular these guys are, the less time they'll have" for fans, says Hagopian.

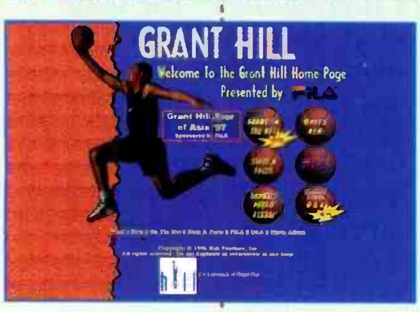
Nike's strategy with athlete sites is also being closely monitored. Nike has kept a low profile on the Web to date, but with its huge stable of pro endorsers and iconic brand, it may be hard to resist the lure of online extensions. Nike representatives declined to comment on any Internet plans.

Perhaps Nike's biggest hero, Michael Jordan, will go up on the Web by late October. His debut will come via a site developed by SportsLine, which says a number of his endorsement partners have expressed interest in signing on. The buzz around the site and its famous namesake pegs initial construction costs at more than $1 million. Dotson won't comment on the cost, but he says Jordan could perhaps have "the most elaborate of all sites on the Web."

If Jordan's site proves a slam dunk with his regular sponsors, that could be the signal needed to spur sponsorships from Web-only brands as well. Since brands like Amazon.com or CDNow have yet to venture into offline sponsorship deals, starting online would be a no-brainer.

Yet agents and Web publishers remain cautious about lending their properties too readily to tech startups. "You don't want to sell it on the cheap." says Advantage's George. "You don't want to make this on a cost-per-thousand sell because the reach is not there yet." He also notes that cutting low-cost sponsorship deals on the Web could alienate such heavy media spenders as auto makers and soft drink marketers. The sponsor, not the star, still controls the checkbook. ■

Virtual autographs? Cal Ripken (and the rest of major league ballplayers) posted their own Web sites during the All-Star Game. Hoops star Grant Hill's site has drawn such sponsors as GMC Trucks and Fila.



Joanne Davis
President, Advertising Club of New York
Managing Partner, Bozell Worldwide

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CULTURE TRENDS

Billboard's Top 15 Singles

Compiled from a national sample of retail, store and rack sales reports, for the week ending Sept 6, 1997 provided by *Sound Scan.*

This Week	*Last Week*	*Peak Pos.*	*Wks on Chart*	*Title*	*Artist*
1	1	1	6	**Mo Money Mo Problems**	Notorious B.I.G.
2	3	2	11	**Quit Playing Games**	Backstreet Boys
3	2	1	13	**I'll Be Missing You**	
4	5	4	4	**2 Become 1**	Spice Girls
5	6	5	12	**How Do I Live**	Leann Rimes
6	4	4	10	**Semi-Charmed Life**	Third Eye Blind
7	New	7	1	**Barbie Girl**	Aqua
8	8	7	5	**Never Make A Promise**	Dru Hill
9	14	9	3	**You Make Me Wanna**	Usher
10	7	6	9	**Not Tonight**	Lil Kim
11	11	11	9	**All For You**	Sister Hazel
12	13	12	9	**Invisible Man**	98 Degrees
13	9	7	15	**Do You Know**	Robyn
14	10	7	9	**Sunny Came Home**	Shawn Colvin
15	15	15	8	**Up Jumps Da Boogie**	Magoo and Timbaland

EASTERN

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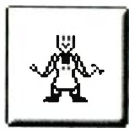

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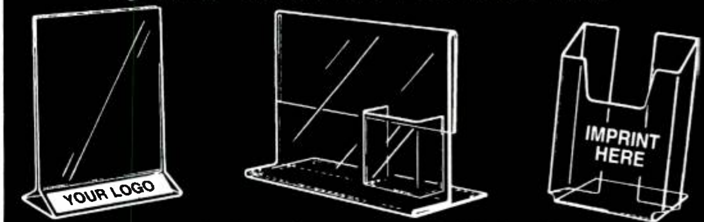

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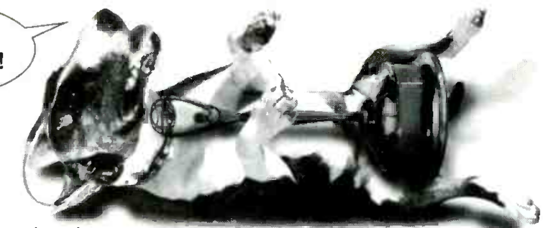

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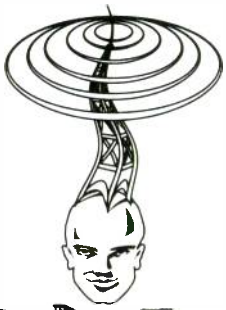

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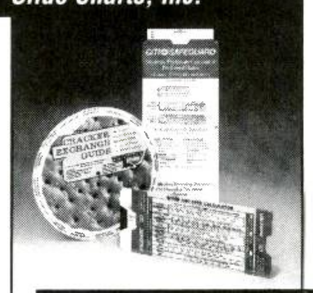

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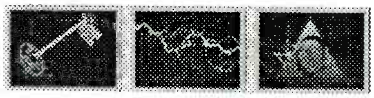

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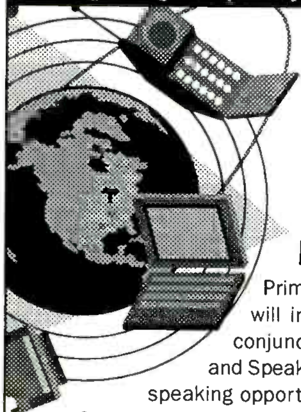

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Primarily, you will act as the national PR liaison to all Digital City markets. This will involve editing local press releases, developing local outreach programs in conjunction with programming initiatives, and coordinating the national and local PR and Speaking Calendar. Additionally, you will manage the PR Agency, write and coordinate speaking opportunities, field media calls, and manage Digital City's relationship to America Online.

Qualified candidates must possess a BS/BA, a minimum of 4 years PR experience (agency experience beneficial), as well as excellent written and oral communication skills. Established media contacts a definite plus as you'll be dealing with CEO level executives.

DCI offers a full comprehensive benefits package including vacation, 401k, stock plan, tuition reimbursement, health, vision, and dental insurance. **For immediate consideration, please send your resume indicating dept. code: 01ABM002 via ONE of the following: E-mail: careers@aol.net (ascii text only); FAX: 703-265-5699 or 703-265-5769 (fine mode); Mail: Staffing Operations, America Online, Inc., 22000 AOL Way, Dulles, VA 20166.** EOE

DIGITAL CITY INC.

CALL 1-800-7-ADWEEK

USE ADWEEK MAGAZINES TO GET NATIONAL EXPOSURE

HELP WANTED

FCB

FCB/SF Announces a Media Event of Major Importance

At least to media professionals it is.

It's not every day you'll see an ad in Adweek for the most desirable position for a Media Strategist this side of the Mississippi. Work for the most successful agency in the west and the most wonderful client in the world (Levi's). The winning candidate will have major brand experience in all media with 3-5 years experience in National Broadcast Print and at least 2 years as a Supervisor. Send a very persuasive letter with your resume to:

Foote, Cone & Belding
733 Front Street
San Francisco, CA 94111-1909
or e-mail sevieric@fcb.com.

That is, if it's important to you.

NATIONAL SALES MANAGER

Top stock photo agency seeks candidate w/5+ years exp managing and motivating customer service staff of 50+. Must have knowledge of budgeting, negotiating, legal processes. Industry related exp a +. Send resume w/sal requirements & cover letter stating proven sales success to:

Mr. Loman
FPG
32 Union Sq East, NYC 10003
or fax 212 473-5182

PROMOTION MANAGER

World-class travel magazine seeks first class manager/strategist/writer to work with research department and ad agency. Create marketing programs aimed at blue-chip clients. Tap resources of respected global media powerhouse. Washington, D.C. location. Degree in marketing, advertising or communications a plus. 5 years experience. Competitive benefits package. Please send cover letter and resume to:

ADWEEK Classified
Box 4018
1515 Broadway, 12th fl.
New York, NY 10036

We are an equal opportunity employer

CALL 1-800-7-ADWEEK

CREATIVE DIRECTOR/ MARKETING

We are currently seeking a talented individual to handle all aspects of creative marketing for a growing retail company in NYC. This individual will have 10 yrs+ exp in retail promotions, marketing planning & administration, budget planning & reporting. Must have excellent communication skills & the ability to manage multiple projects. Knowledge of Mac & PC environments (QuarkXPress, Adobe Photoshop, PageMaker, Illustrator, FileMaker Pro & MS Word) req'd. Fax resume & salary requirements to:

BARNES & NOBLE
COLLEGE BOOKSTORES, INC.
FAX (212) 780-1892
EOE M/F

Advertising

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specializes in placement in the Advertising industry. Our present opportunities include:

*MEDIA BUYERS..................$35-45k
*ACCOUNT EXECS..............TO $60k
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*DIRECT MARKETING/ DIRECT MAIL A.E.'s.............$26-45k

Many Entry Level And Experienced Positions Available--

Please Contact Our NY Office At:
Ph: 212 972-9300
Fax: 212 697-8637

SPOT NEGOTIATOR

Fast growing NYC based Media Service has several positions available for Spot Broadcast Negotiators w/3+ years experience in both Radio and Television. No Trade or Barter involved. Candidates must possess strong negotiating skills, be computer literate, and have experience evaluating & executing promotional programs. Salary commensurate w/experience, benefits.

Fax resume to:
212-753-5297
Attn: Alexandra Sinclair

ADVERTISING SALES

NYC based alternative, out of home media company is looking for a sales rep. with a minimum of 2 years experience. Contacts within the advertising community is a must. Opportunity for growth and advancement. Fax resume to:
(212) 262-7279

AD/CREATIVE DIRECTOR
Northern NJ

We need a smart, talented AD who is truly Mac literate to handle all aspects of creative for an established and growing marketing communications firm in Northern NJ. From national B2B print campaigns, direct and dimensional mail to sales promotion and technical pieces. You: versatile, experienced, professional, detail-oriented, ready to interact w/clients, a great designer who can handle type, and a strong manager of staff and a wide range of freelance talent. High level of integrity, strongest references only. (We value honesty and loyalty. Very old-fashioned that way.) Be an indispensable part of the team! Fax salary requirements and a letter stating why you'd be the asset we're looking for to complement our growth plans! No calls, no amateurs, no nuts.

FAX TO:
Cuffari & Company
(201) 746-8180

ADVERTISING SALES

Excellent opportunity to join leading trade publication edited for professional photographers and creatives at design firms and ad agencies.. If you have sales experience calling on high technology, stock photography, and paper mill accounts, have internet sales experience (a plus!), have 3 solid years sales experience, and look forward to developing an existing account list plus pitching new, unsold ones, **send your resume, along with a cover letter stating salary history and requirements to:**

Associate Publisher, PDN
1515 Broadway, NYC 10036
FAX (212) 536-5224

Magazine Ad Sales

A very unique advertising sales career opportunity is available with WEIDER Publications' *Muscle & Fitness* and *FLEX* magazine. This person must possess a knowledge of the fitness and nutritional markets. If you have a passion for the lifestyle and the ability to convince us that you're the person we are looking for to represent these magazines then fax your resume immediately to the attention of Greg Matuskiewicz at:

(212) 241-0640

Sales Reps

Seeking expd pro Sales Reps for expanding, successful computer trade mag. Several territories available. 5 yrs. exp. reqd. Send res & sal requirements to:
***Attn:* V.P. Sales,**
West World Productions
Fax: 310-777-4589

CALL 1-800-7-ADWEEK

RETAIL MARKETING SERVICES AGENCY

is seeking energetic, highly organized self-starters to join its team of Regional Mgrs. The right candidate will have: sales experience calling on grocery/mass merch. or chain drug retailers, developing and executing retail promotions and excellent computer skills. (excel, word). Light travel. Advancement.

Fax or mail resume to:

TRADEZONE
53 Riverside Ave.
Westport, CT 06880
203-291-3970
Attn: Personnel Dept.

GM's/GSM's

Growing radio network offering unique management opportunities. Proven leaders needed to attract and develop strong sales teams. Ability to maximize revenue for spot and block programming. Each position requires deep experience in retail/concept selling, the ability to teach, computer proficency and a willingness to lead by example. **Positions available in top ten markets.**

ACCOUNT EXECUTIVES

Conceptual, creative, client focused marketing strategists needed for multi-ethnic radio stations. Must be computer proficient. **Immediate openings in Boston, Seattle, Houston, San Francisco, New York, Chicago.**

Fax resumes to:
Steven Schoppa, Sr. VP/COO
Douglas Broadcasting, Inc.
Fax: 713-349-9365
Equal Opportunity Employer

NEW MEDIA REPORTER

Adweek's IQ News, a section devoted to news and analysis of marketing and media in the online industry, seeks a junior reporter in its New York office. Two to three years reporting experience with a news background required. Experience covering the Internet field preferred. EOE

Send resume/salary history to:
ADWEEK Classified, Box 4021
1515 Broadway, 12th fl.
New York, NY 10036

Production Manager

Growing Stamford Connecticut based consumer magazine company seeks Production Mgr. 2 to 5 years magazine production exp. a must. Send resume and salary history to Box# 00588, ADWEEK, 5055 Wilshire Bl., LA, CA 90036.

HELP WANTED

achieve more

Manager of Advertising

Our Small Business Services Business Unit is seeking a Manager of Advertising and Media Strategy. The focus will be brand development and new product launches employing awareness TV, direct response TV, print and radio. The incumbent will need to be comfortable managing our Agency contacts and working closely with internal advertising, media and research groups. A minimum of 5 years of comprehensive Advertising account management experience is required. Experience with direct response and large national/international brands is preferred. The ability to communicate your strategic ideas and influence decisions effectively in a cross-organizational environment is essential.

American Express offers an outstanding compensation and benefits package. Interested candidates should submit a resume and salary history to: American Express, Staffing Dept., Job Code: 77294AWFC, American Express Tower, World Financial Center, New York, NY 10285-0203. We are proud to be an equal opportunity employer.

do more

AMERICAN EXPRESS® Cards

ARE YOU HIGHLY CREATIVE? STRATEGIC? ENERGETIC? A TEAM PLAYER?

Then come work at one of America's top-ranked promotion marketing agencies. Multiple openings for the following:

Senior Art Directors/Senior Copywriters

7+ years promotion marketing experience. Highly skilled in concepting, design/copy and brain storming. Proven small group and multi-project management skills. Strong presentation skills and business maturity. Nimble mind, fast execution. ADs require: PhotoShop, Illustrator, Quark.

You'll work on blue-chip national accounts and head up your own creative team of friendly, talented professionals. Fast paced, fast growing environment.

QLM MARKETING

No calls. Please send resume to:
Personnel, QLM Marketing, 470 Wall Street, Princeton, NJ 08540
Fax to: 609-921-8847 or e-mail to: personnel@qlm.com. EOE.

GREAT OPPORTUNITY FOR ASSERTIVE SALESPERSON

with minimum 2-3 years experience. National out-of-home advertising company seeking ambitious and knowledgable salesperson to join New York staff. Quality company, quality product, quality client list means bright future for a sales-minded self starter.

Fax resume to: (212) 777-6174

Classified Advertising Call M. Morris at 1-800-7-ADWEEK

IHF℠

INTERNATIONAL HOME FOODS, INC.

INTERNATIONAL HOME FOODS, INC. is a $1.5 billion company with an aggressive growth strategy. Our name may not be well known, but our brands are . . . Chef Boyardee, Pam, Bumble Bee Tuna, Crunch 'n Munch and Gulden's. IHF's entrepreneurial environment supports creative and strategic thinking people with a sense of urgency.

We have current opportunities available at our northern NJ Corporate Headquarters for results oriented marketing professionals.

Successful Director level candidates will be degreed with a minimum of 7 years experience (MBA preferred, but not required); Product Managers with 3 to 4 years experience in marketing, market research, sales or promotions and Associate PMs having 2 plus years experience all with demonstrated success at executing marketing strategies for a wide line of food and snack products.

In addition to a comprehensive, highly competitive benefit and compensation package, these excellent opportunities include an equity stake in the company.

Thank you for your interest and we will contact candidates who meet our requirements.

For confidential consideration, send your resume and cover to:

International Home Foods, Inc.
Marketing Opportunities
1633 Littleton Road, Parsippany, NJ 07054
or fax to: 201/254-5473

EOE - no third party or telephone inquiries.

Chef BOYARDEE® PAM® FRANKLIN Crunch 'n Munch® GULDEN'S® RANCH STYLE® BRAND

HELP WANTED

DIRECTOR OF LOCAL MEDIA OUTREACH & DEVELOPMENT

THE ADVERTISING COUNCIL, INC.

The Advertising Council, the leading provider of public service announcements in the US (Smokey Bear, "A Mind is a Terrible Thing to Waste," "Friends Don't Let Friends Drive Drunk") is looking for a Director of Local Media Outreach & Development. Candidates should have a solid media background with 3-5 years of experience in an ad agency media department, advertising company or in media sales.

This position is responsible for developing unique community-based programs between non-profits and the media as well as marketing the Ad Council's public service advertising to local media, tracking results and strengthening existing relationships with media partners.

The ideal candidate is a strategic thinker, detail oriented and highly motivated with the ability to work in a team environment. Must also possess excellent written, verbal and interpersonal skills. Concern for and interest in social issues is a must.

Apply in writing to:

Ms. Frances Thompson, Director, Human Resources
The Advertising Council, Inc.
261 Madison Avenue - 11th Floor
New York, NY 10016-2303
Fax (212) 922-1676
E-mail FThompson@adcouncil.org
No Calls Please

Ad Council

NATIONAL ADVERTISING REPRESENTATIVE

Opportunity for highly motivated sales professional with proven ability to generate incremental revenue from existing accounts as well as develop new business. You will be responsible for the management and development of a diverse number of national ad categories. This position requires strong written and oral communication skills and fully developed planning and organizational skills. In addition to selling and servicing local accounts, this position entails over-night, out of state travel. Prefer candidate with 3+ years national advertising experience but will consider other applicants with similar industry experience.

Submit resume and confidential salary history to:

The Hartford Courant
Employee Services and Community Affairs
285 Broad Street
Hartford, CT 06115
The Hartford Courant is an Equal Opportunity Employer Committed To Workforce Diversity

PROMOTION COPYWRITER /SPECIAL PROJECTS MANAGER

Major consumer magazine publisher seeks experienced promotional writers. Responsibilities may include: developing creative concepts for special advertising sections, creating sales support materials, writing all collateral materials and writing/editing special sections. Applicants must have a strong writing background with the ability to shift tone from creative copywriting to fact-based selling materials.

Please forward resume with cover letter and salary history and requirements to:

(FAX) 212-880-6909
Attn: DM

TELEMARKETING

Leading media barter company seeking people for telemarketing dept. You will be contacting senior management in Fortune 500 companies under the direction of a senior account executive. We are looking for aggressive self-starters interested in high income potential. Fax resume and salary history to:

SVP, Business Development
Fax #: 212-755-6312

MEDIA PROFESSIONALS

MEDIA PLANNING SUPERVISOR for National Broadcast Acct...$70K
SR. MEDIA PLANNER for professional sports organization:..$60K
SR. SPOT T.V. BUYER:............$60K
JR. SPOT T.V. BUYER:............$35K

Call 1-800-580-3037
or Email MediaNY@aol

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ADWEEK CLASSIFIED

The Resource for Freelance Direct Marketing

Heather Frayne
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45 Christopher St., New York, NY 10014
visit our website at www.dmoc-inc.com

DMOC
DIRECT MARKETERS ON CALL, INC.

ADVERTISING SALES

Account Executive

Opportunity to join the industry leader in the field of airline menu publishing. As part of O'Sullivan Menu Publishing's sales team, you will sell advertising space for a new menu/destination guide.

Candidates should have at least 3 years print media experience selling consumer oriented advertising space for a magazine or related publication. Sound selling, communication and presentation skills (oral and written) are required. In addition, candidates should have a proven track record in creative sales. Applicants must be willing to travel domestically and internationally as required.

Qualified candidates should send their resume with salary requirements to:

O'Sullivan Menu Publishing
Attn: **Human Resources, Dept. AE-AW**
110 Triangle Boulevard, Carlstadt, NJ 07072

"Move faster, work harder, think smarter (have more fun and earn more money)."

If this describes your selling style, please send resumé to us, the **#1 Out-of-Home Media Company**.
We have opportunities for aggressive self-starters willing to give a lot to get a lot.
Immediate opportunities in Atlanta and Chicago.

TDI

Send resumé to: Human Resources
TDI, 275 Madison Avenue, New York, NY 10016
NO FAXES! NO TELEPHONE CALLS!

Spot Broadcast Buyer

3-5 years' exp. negotiating mid- to large-size markets (TV & radio). Strong negotiating skills, post-analysis experience and ability to meet deadlines. MAC and Donovan skills a plus. Mail or Fax resume (no phone calls please) to:

RP alpha
302 Harper Pl., Suite 203
Moorestown, NJ 08057
(10 Minutes East of Philadelphia)
FAX: 609-439-4115

MEDIA SUPERVISOR MEDIA PLANNER

New account growth at top media management Co. creates terrific growth opportunity. Seeking two talented, experienced media pros to lead charge on large multi-media account. We need good communicators who are computer literate; MS Word, Excel, and IMS & DDS a plus. FAX resume with cover letter and salary requirements to:

Mr. Edwards at (212) 632-0250.
Excellent salary & benefits.

RED LIGHT, GREEN LIGHT, GO!!

Numerous Opportunities Available for candidates with 2 years + experience. Excellent Benefits. Salary Up to $42K. Please call the New York Office of THE GROMWELL GROUP. Ph: 212-972-9300, Fax: 212-697-8637

CAREER SURFING?

www.rga-joblink.com

Roz Goldfarb Associates
(212) 475-0099

HELP WANTED

ART DIRECTOR

Redken 5th Avenue is seeking a high performance Art Director with strong design skills and broad-based experience in communication design.

Creative projects include: directing photo shoots, advertising, packaging, sales promotion, in-store merchandising units. point-of-sale promotional items, informational and educational literature, audio visual and video presentation, trade show displays and exhibits, Art Director will be responsible for maintaining the Macintosh computer system (both hardware and software).

The successful candidate will have experience as a staff designer and 6+ years experience as an Art Director. Must have experience working in the cosmetics, retail or beauty industry and a strong fashion sense. Mac skills required: Quark, Illustrator, Photoshop, Freehand, and Persuasion. Candidates must have a BFA degree. We are an equal opportunity employer M/F/D/V.

Qualified Candidates should fax or send resume and salary requirements to:

(212) 984-5209

or Redken Human Resources Dept. TB AD

575 Fifth Avenue, New York, NY 10017

REDKEN

Media Planners and Buyers

Can you start tomorrow?

Paladin Interim Staffing has immediate openings for **media planners and buyers** with 3-5 years print and/or broadcast experience. **We have an exciting range of assignments available at tri-state area agencies and companies.** If you're freelancing and available to work now, send your resume today. We'll take it from there.

Paladin Resource Department
270 Madison Ave., Suite 201
New York, NY 10016
Fax: 212/689-0881
E-mail: newyork@paladinstaff.com

EOE/M/F/D/V

PALADIN.
INTERIM STAFFING
New York • Chicago
Los Angeles

WASHINGTON, DC AD AGENCY SEEKS SENIOR MEDIA PLANNER AND BUYER

If you've got strong media planning skills on a variety of businesses, including high-tech, business-to-business, retail, fast food, let us know. We're looking for a strategic thinker, a creative planner, someone who knows how to pay off marketing strategies in the media arena, who has extensive media research experience, who's not shy in their opinions, and who would rather write and present plans than just about anything. Must have 7 years agency experience.

We also seek a seasoned broadcast media buyer capable of handling multiple markets. Must have strong negotiating skills and possess a talent for securing value-added merchandising and promotions for our clients. Packaged goods and fast food experience a plus. Must have 5 years media buying experience.

We offer great benefits, your birthday off and annual staff fishing trip.
Send resume to:

Wendy Weaver

Goldberg.Marchesano.Partners.Inc.

1700 Wisconsin, NW, Washington, DC 20007

FAX (202) 298-3477

EOE

SALES MANAGER

Science, the world's largest general scientific/biomedical magazine, is seeking an experienced **advertising sales manager** to work out of its DC headquarters. Person will be responsible for managing both print life sciences product advertising and on-line life sciences advertising sales both in the US and overseas. Person will manage three national and three international sales people as well as internal traffic/production staff. Position requires bachelors degree; three to five years experience in either magazine advertising sales, preferably for a technical publication, or life sciences technical sales required. Competitive package and excellent benefits. Interested applicants may send resume and cover letter with salary requirements to:

Science, Associate Publisher
American Association for the Advancement of Science (AAAS)
1200 New York Avenue, N.W., Suite 902
Washington, DC 20005

or fax resumes to 202-682-0816
Deadline for resumes to be submitted is 9/15/97.

EOE. Non-smoking work environment.

As a growing, cutting edge new media services company, we're looking for-

BUYER

2+ years experience ... computer savvy a must ... proficiency in CORE would be ideal!

MEDIA PLANNER

2+ years working experience ... computer skills in Excel a must!

COMPUTER OPERATIONS

Entry level position available for bright, innovative problem solver. Must be proficient with pre-packaged suites & quick study with new software packages. Great working environment, instant responsibility (this is NOT data entry).

DON'T WAIT...DON'T HESITATE - **FAX RESUME 212-986-2282**
Attn: Human Resources

pkg media inc.
program packaging ... the next generation

MARKETING MANAGER

O'Sullivan Menu Publishing, the industry leader in airline menu publishing, seeks an experienced marketing professional to implement and execute sales and marketing strategy for its new menu and destination guide.

Candidates must have strong skills and experience in consumer focussed marketing. In addition, he or she should possess skills in the following areas: management, negotiation, communication, presentations, public relations, and promotions. Agency and client side marketing experience is helpful. Experience with a controlled circulation magazine is plus.

Please send resume and salary requirements in confidence to:

O'Sullivan Menu Publishing
***Attn.:* Human Resources, Dept. MM-AW**
110 Triangle Boulevard, Carlstadt, NJ 07072

MAGAZINE AD SALES

Columbia Journalism Review has a challenging position for someone who wants to develop in the advertising sales business. You will be responsible for selling ads in the book category and will assist senior sales staff in various administrative and support duties. You can hone your skills in many aspects of the magazine business including sales, traffic, promotion, production and administration. You should be energetic, articulate and work well under deadlines. Experience with ACT, Lotus, QuarkXpress, and database management is needed. Experience in a magazine sales department, ad agency or p.r. firm highly desirable.

FAX resume to: **Advertising Dept., CJR, 212-854-8580**

No phone calls please.

NATIONAL TV
SALES ASSISTANT 1-2 Years Experience

NYC based company seeks sales professional to assist Account Executive representing syndicated, cable and satellite TV. Computer skills required. Salary based on experience.

Please fax resume to "Sales Assistant" @ (212) 702-4625

HELP WANTED

WANTED: EXPERTS IN CREATIVE ADVERTISING

At SBC Communications Inc., our dynamic professional environment and exceptionally talented staff combine to set the tone for excellence and continuing sales achievement. As one of the nation's largest cellular services companies, our progressive organization is clearly an employer of choice. We currently seek talented advertising professionals to join us in Boston, Dallas, St. Louis, San Diego, Sacramento, Pleasanton, and Washington D.C./Baltimore as—

CORPORATE MANAGERS Wireless Advertising

We seek creative, results-oriented individuals to interface with Marketing Directors and advertising agencies to produce effective advertising. This will include directing the development of mass media, direct mail and customer communications to support wireless customer growth and retention. Responsibilities will include managing a budget, tracking advertising expenses and sales results, developing annual media plans, and initiating creative advertising/ marketing strategies.

Preferred candidates will have an ad agency background along with experience in retail, wireless or consumer electronics. Exceptional project management, problem solving, and communication abilities are essential. PC proficiency is expected. A Bachelor's degree in a related field is a requisite as well as 5-7 years of related work experience.

We offer a competitive salary and benefits package. For confidential consideration, please send your resume **indicating geographical preference** to: **SBC Communications Inc., Attn: ADCMWA, One Bell Center, Suite 224, St. Louis, MO 63101.** An equal opportunity employer.

SBC Communications Inc.

Creative twist

JWG Associates, Inc. *needs copywriters who can twist words — and art directors who can twist words into pictures. As a national advertising agency, we're growing like there's no tomorrow, producing massive volumes of high-concept creative work. If you have a good command of business and management trends, a presentation style that wins new clients, and the desire to work with a company where everyone is expected to be creative — not just the writers and art directors — send us your best samples today. We currently have opportunities available in* **Philadelphia, Boston** *and* **San Francisco**.

ART DIRECTORS

FULL-TIME & FREELANCE
Requirements: 5 years of solid experience in print design and production; thorough knowledge of QuarkXPress, Photoshop and Freehand; flexibility to design for various media; the ability to train for two weeks in Boston; and the initiative to take a little direction a long way. **Code KM**

COPYWRITERS

FULL-TIME & FREELANCE
Requirements: 5-8 years of experience in print advertising; ability to write for all industries — quickly, creatively and accurately; excellent people skills; the ability to train for two weeks in Boston; and the stamina to write 10 ads each day — just kidding (sense of humor is essential :-) **Code NW**

Please send at least five samples, indicating which location you're interested in, to our corporate office: **Code_____, JWG Associates, Inc., 888 Worcester Road, Suite 140, Wellesley, MA 02181; FAX: 617-235-3432.** *Interviews will be held locally.*

JWG ASSOCIATES

We are an equal opportunity employer that finds creativity in diversity.

Sr. Broadcast Buyer/Seattle

We can't offer you the corner office, so how about the corner state?

Your office may not exactly be the penthouse suite, but if you'd rather enjoy a place with a coveted view of Puget Sound, the Olympic Mountains and the Seattle skyline, you may want to work for Seattle's largest advertising agency, Evans-Group. Candidates should have 3-5 years experience in major markets. Retail experience is a plus.

For confidential consideration, please send or fax a cover letter and resume to:
Director of Broadcast
190 Queen Anne Avenue North
Seattle, WA 98109
FAX: (206) 283-2018

All we offer is wealth, security & respect. Interested?

Seize the opportunity to join a booming industry at exactly the right time. We're looking for highly motivated, compassionate and intelligent individuals to become independent sales reps for **General Electric Capital Assurance Company of New York** - the nation's #1 provider of Long Term Care Insurance.

Long Term Care Insurance is one of the growth industries of the 21st Century, with a virtually unlimited market. You have the chance to make a great income while selling a product that brings security and peace of mind to an aging population. We offer:

- High Income Potential (Commissions, Renewals and Vesting)
- Performance Bonuses
- Extensive Training and Field Support
- Quality Lead Generation (no cold calls)
- Management Development Program

To pursue this very special opportunity in the New York Metropolitan area, call or fax your resume to:

Richard Rosenthal, Regional Manager
1-800-762-9677 Fax: 1-914-332-8421

GE Capital Life Assurance Company of New York

Make a good life for yourself. And for others.

FREELANCERS NEEDED

If you have production talent and have a good design eye - we need you- We have many freelance and full-time positions - Must know Q, IL and PS. Fax resume to Artisan @212 448 0408. See our web site for our most current job listings: www.artisan--inc.com

Sunshine All Year Long!

Miami bsd Hisp adv Agcy has opg for a **Media Dir & biling Sr. Acct Exec.** MD must have a min of 5 yrs exp in the Hisp mkt & exc compu skills. SAE must have strong acct mgmt capabs w 3-5 yrs exp mngng adv campgns for natl advtsrs. Exp w retail a +! Exc sal/bfts. Resumes to 305-667-3371

Reach your ad community in
ADWEEK CLASSIFIED

HELP WANTED

Giants Wanted.

David Ogilvy says, "We must hire people who are bigger than we are." People with a desire for growth, who aspire to become the best in their field. Who can take on assignments that are truly exciting while tackling issues changing the face of how we communicate with our customers.

As a **Media Planner** within our **OgilvyOne Media Team**, you'll be involved with print, DRTV, the Internet, and more. To join our New York-based team, you should be someone who embraces a direct marketing approach to media with at least two years agency experience. You also need to be a proponent for the latest innovations in computers and up on the current trends in new media.

OgilvyOne worldwide

FAX to 212-237-6072, attn: JK, or e-mail to oowmedia@aol.com (no calls). OgilvyOne worldwide is an Equal Opportunity Employer.

EOE M/F/D/V

ACCOUNT EXECUTIVE NEW BUSINESS DEVELOPMENT

Grow With Us

Dynamic, fast-paced boutique advertising agency with large corporate clients seeks experienced individuals to assist in new business development, and sales support. The high-caliber people we seek possess excellent presentation, organizational and relationship-building skills, and have 3-5 years experience in an agency environment. Travel & leisure, consumer products, and/or business to business experience a plus. Excellent growth opportunity and attractive compensation and benefits package. Challenging, friendly, team-oriented environment. Please send/fax resume w/salary requirements in confidence to:

Dept.: Growth/AW
the.NAK.group
29 East 10th Street, 5th Fl., New York, NY 10003
Fax 212-505-9399

FALLON McELLIGOTT BERLIN

seeks individuals for the following positions:

PRINT PRODUCTION MANAGER

2+ yrs exp in ad agency. Chance to work on exciting, nationally run advertising. Independent, assertive, able to juggle many things at once. Knowledge of traffic a BIG plus. Salary commensurate with experience.

TRAFFIC COORDINATOR

1+ yrs exp in ad agency. Must have knowledge of print production and a good sense of full agency workings. Can deal with many different types of personalities. Salary $30K.

Fax to Kerry Ernst @ 212-206-0750
or send to 79 Fifth Avenue, NY, NY 10003

For Classified Advertising Rates

Call M. Morris at 212-536-6493 or 1-800-7-ADWEEK

We love to see other people work.

Because that means we've done our job. Every year, we fill thousands of interim and contract assignments with hundreds of agencies and companies nationwide. We place all types of experienced marketing, advertising, communications and creative professionals. And some of the jobs turn permanent. So if you're available to work now and live in the tri-state area, send us your resume. We'd like nothing better than to see you busy.

Paladin Resource Department
270 Madison Avenue, Suite 201
New York, NY 10016
Fax: 212/689-0881
http://www.paladinstaff.com
EOE/M/F/D/V

PALADIN.
INTERIM STAFFING
Chicago • New York
Los Angeles

le château

Le Château is Canada's leading junior fashion retailer. We are currently seeking the following candidate to be based in our Montreal headquarters.

MARKETING DIRECTOR

You are a fashion guru, able to concept and implement advertising & PR programs, develop visual merchandising strategies and supervise packaging and print production projects from our graphic design team.

Success demands 5-10 years fashion retail track record.

If you have an accomplished creative portfolio, send your resume to:

le château
Human Resources
5695 Ferrier Street Montreal,
Quebec.H4P 1N1
Fax: (514)-738-3670

ADVERTISING MANAGER

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CULTURE TRENDS

The Hollywood Reporter's Box Office

For 3-Day Weekend ending Sept 1, 1997.

This Week	Last Week	Weeks in Rel.	Picture	3-Day Weekend Gross	Total Gross Sal
1	1	1	G.I. Jane	10,282,285	26,252,380
2	2	1	Money Talks	9,447,066	23.652.478
3	3	5	Air Force One	8,520,110	154,240,266
4	New	--	Hoodlum	8,126,768	10,203,522
5	5	3	Conspiracy Theory	6,853,154	62,969,824
6	New	--	Excess Baggage	6,309,583	6,309,583
7	4	1	Mimic	6,180,990	16,901,427
8	6	2	Cop Land	5,784,542	36,037,384
9	New	--	Kull the Conqueror	3,450,145	3,450,145
10	10	8	Men in Black	3,355,069	235,057,188
11	7	2	Event Horizon	3,115,054	22,588,898
12	9	6	George Of The Jungle	3,030,128	94,974,307
13	New	--	She's So Lovely	3,020,015	3,036,081
14	8	1	Leave It To Beaver	2,752,105	7,564,955
15	11	7	Contact	1,954,990	94,977,242
16	18	12	Con Air	1,219,756	99,504,802
17	16	10	My Best Friend's Wedding	1,014,393	119,454,579
18	15	4	Air Bud	981,142	20,720,803
19	13	4	Spawn	957,511	51,855,162
20	14	1	A Smile Like Yours	841,446	2,414,040
21	12	4	Picture Perfect	782,163	29,002,139
22	30	2	The Full Monty	694,432	1,734,173
23	22	7	Shall We Dance?	656,521	5,280,551
24	23	6	Mrs. Brown	626,560	4,402,632
25	19	3	Def Jam's How To Be A Player	494,193	12,785,469
26	21	9	Face/Off	466,740	109,380,852
27	20	6	Nothing to Lose	450,089	42,395,128
28	27	3	Career Girls	426,568	1,471,083
29	24	14	The Lost World	419,050	227,881,749
30	26	10	Batman & Robin	412,090	106,712,335
31	28	4	In The Company Of Men	371,883	1,614,411
32	17	1	Masterminds	342,211	1,804.303
33	29	11	Hercules	336,168	91,187,796
34	25	5	Good Burger	270,974	22,022,470
35	34	3	Free Willy 3	269,904	3,278,561

MTV's Buzz Clip

Buzz Clips are usually by new, up-and-coming artists who MTV believes have special potential. Of the 40 videos that MTV designated as Buzz Clips since January 1994, more than 75% have been certified gold or platinum.

Week of 8/25/97

Artist/Group: **Busta Rymes**
Song/Video: **"Put Your Hands Where My Eyes Can See"**
Director: **Hype Williams & Busta Rymes**

From the man who brought the term "WOO-HAH" into our lives: As an alumni of the ground breaking group of Leaders Of the New School, Busta Rymes never knew any way to be but straight up--and now he stands ready with The Coming, as one of the most charismatic fixtures on the entire rap scene.

Artist/Group: **Forest For The Trees**
Song/Video:**"Dream"**
Director:**Kevin Godley.**

A lack of inhibition is what distinguishes Forest For The Trees' self-titled debut album, the brainchild of singer - songwriter producer Carl Stephenson, from other modern music. Carl's organcially grown collage of hip-hop beats and exotic instrumentation does indeed seem unfettered by stylistic allegiances and commercial considerations. Some of you may recognize his work with another music revolutionary --he collaborated with Beck on his first chart hoping hit "Loser", as well as his full length debut **Mellow Gold**.

Artist/Group: **Sarah McLachlan**
Song/Video: **"Building A Mystery"**

McLachlan has made a career out of putting herself on the line emotionally; fans are repeatedly drawn in to her candor a forthrightness. And Sarah's new album, Surfacing, is no different. The Vancouver singer/songwriter's ten-year career has indeed been a decade ascending: in popularity, in profile and, most importantly, in her sense of self.

CALENDAR

The National Association of Minorities in Communications hosts the **11th Urban Markets Conference** on Sept. 15-16 at the Grand Hyatt Hotel in New York. Contact: 212-370-5483.

MacDonald Communications, publisher of *Working Woman*, *Working Mother* and *Ms.*, will present the **1997 Work/Family Congress and CEO Summit** Sept. 15-16 at the New York Hilton & Towers. Contact: 800-477-2900.

The National Association of Broadcasters radio show will be held Sept. 17-20 at the New Orleans Convention Center. Contact: 202-429-5419.

The Radio Television News Directors Ass'n international conference will be held Sept. 17-20 at the New Orleans Convention Center. Contact: 202-467-5200.

Suburban Newspapers of America presents the **Fall Publishers'/Retail Advertising Managers' "Focus" Conference** Sept. 21-24 at the Sutton Place Hotel in Vancouver, B.C., Canada. Contact: 312-664-6610, ext. 3296.

Women in Cable & Telecommunications' Greater Texas chapter presents **"Telco 101 and Interconnection Course"** Oct 2-3 at Paragon Cable in Irving, Texas. Contact: 312-634-2353.

New York University presents a conference entitled **"The Changing Landscape in Entertainment, Media and Communication Technology,"** Oct. 30 at the Stern School of Business. Contact: 212-998-0548.

Media Notes

NEWS OF THE MARKET

DirecTV Clears Game Net

Game Show Network last week signed a distribution deal with DirecTV that will bring its total subscriber count to 8 million. The network, which is wholly owned by Sony Pictures Entertainment, plans to launch several new programs, including kids' versions of *Wheel of Fortune* and *Jeopardy!*, later this year.

Learning Curve: 60M Subs

The Learning Channel, which is owned by Discovery Communications, said last week that it has passed the 60 million-subscriber mark, having just reached 60.7 million subs, according to the Nielsen Homevideo Index. Since Discovery acquired the channel in 1991, the network has added 45.2 million subscribers and has become one of only 17 ad-supported cable networks to surpass the 60 million mark.

Mags Assist Minorities

A short course designed to encourage the advancement of minorities in the magazine industry kicks off this week in Tarrytown, N.Y. Sponsored by the Magazine Publishers of America and the American Society of Magazine Editors, 30 people of color will learn about the "cross-functional nature of magazine publishing" through case studies and developing the relaunch of a mock magazine, said MPA vp Vaughn Benjamin. Participating magazines include *Essence, People* and *Reader's Digest.*

Vance Upped at Wenner

Wenner Media—publisher of *Rolling Stone, Us* and *Men's Journal*—last week promoted Donia Vance to corporate marketing and promotion director. Vance succeeds Andrea Cautela, who left the company.

Latino Weekly Launches

New York-based Latin Communications Group last week began distributing its *El Puente Latino*, a free news and arts paper targeting New York's young Spanish-speaking population. The publication was launched as a monthly, but Latin hopes to take it weekly by early next year if advertiser interest remains steady. The paper's first issue attracted such advertisers as Nordstrom's, Home Depot and Aero Peru. Latin Communications distributed 100,000 issues of *El Puente* last week. The company also publishes *El Diario/La Prensa* and operates 15 Spanish-language radio stations and three television stations.

Brits Get Pearson Push

As part of its ongoing effort to get into network-TV series production in the U.S., Pearson Television has turned to its U.K.

Fox Elevates 3 Execs

Jacobson: New Fox network president.

Fox Broadcasting Co. last week promoted three of its top executives: David Hill, Larry Jacobson and Jon Nesvig. Hill was named chairman and CEO of Fox Broadcasting; he continues as CEO of Fox Sports Net and president of Fox Sports. Hill reports to Chase Carey, chief operating officer of Fox parent News Corp. and chairman-CEO of Fox Television. Hill joined Fox in December 1993 as president of Fox Sports and built the entire division.

Jacobson, formerly executive vp of Fox Television and executive vp and chief financial officer of Fox Broadcasting, becomes one of Hill's chief lieutenants as the new president of Fox Television Network. Jacobson will oversee network distribution, finance, research, operations and business development. Jacobson joined Fox in 1990; as exec vp, he had a hand in creating the Fox Kids Worldwide joint venture with Saban Entertainment, as well as Fox Sports and Fox Sports Net.

Nesvig, Fox Broadcasting president of sales, assumes additional corporate duties as executive vp of Fox Television. Nesvig is responsible for developing ad sales strategies across all Fox and News Corp. television businesses worldwide. Nesvig has been chief of Fox Broadcasting sales since June 1994.

Media Notes

CONTINUED

roots, signing veteran British writers Simon Nye, Paul Makin and Matthew Hall. Nye is best known as the creator and executive producer of the hit U.K. sitcom, *Men Behaving Badly*, adapted by Carsey-Werner for a U.S. run on NBC. Makin will also work on adapting his U.K.-based series, *Grown Ups*, for Pearson in the U.S. Hall, a former barrister, created *A Wing & a Prayer* for Thames Television.

'Donny & Marie' Strong for Col TriStar

Donny & Marie, featuring the singing duo of Osmond family fame, is off to a strong start in syndication sales for its scheduled fall 1998 premiere. Less than a month after Columbia TriStar Television Distribution began offering *Donny & Marie* to stations, the talk show has been sold in 50 markets representing more than half of U.S. broadcast coverage.

CMR Top 50

A weekly ranking of the top 50 brands' advertising in network prime time

Week of Aug. 18–24,1997

Rank	Brand	Class	Spots
1	MCDONALD'S	V234	82
2	WENDY'S	V234	51
3	BURGER KING	V234	38
4	COCA-COLA CLASSIC	F221	20
	MGM/UA—*HOODLUM* MOVIE	V233	20
	RED LOBSTER	V234	20
	TACO BELL	V234	20
8	GATORADE	F223	19
	MIRAMAX—*MIMIC* MOVIE	V233	19
	NEW LINE—*MONEY TALKS*	V233	19
11	NISSAN AUTOS—ALTIMA	T112	18
12	DURACELL—ALKALINE BATTERIES	H220	17
	SEARS	V321	17
14	AMERICAN EXPRESS	B150	16
	MILLER LITE	F310	16
	SPRINT LONG DISTANCE—RESIDENTIAL	B142	16
17	NISSAN AUTOS&TRUCKS	T115	15
	POOHS GRAND ADVENTURE—VIDEO	H330	15
	WRANGLER—JEANS MEN	A116	15
20	CARESS—MOISTURIZING BODY WASH	D122	14
	COORS LIGHT	F310	14
	JC PENNEY—APPAREL	V321	14
23	1-800-COLLECT	B142	13
	JELL-O—PUDDING SNACKS	F115	13
	STAR WARS TRILOGY—VIDEOS	H330	13
	VISA—CHECK CARD	B150	13
27	BOSTON MARKET	V234	12
	JC PENNEY—DRUGS/TOILETRIES	V321	12
	K MART	V324	12
	KELLOGG'S—NUTRI-GRAIN CEREAL BARS	F212	12
	LEXUS AUTOS&TRUCKS	T114	12
	MOTRIN	D211	12
	SERTA	H120	12
	US ARMY	B160	12
	ZYBAN—ANTI SMOKING PILLS	G120	12
36	BRITA—WATER FILTER PITCHER	H235	11
	COLGATE WAVE—TOOTHBRUSH	D121	11
	FOOTACTION USA	V313	11
	HUNT'S MANWICH—SLOPPY JOE SAUCE	F117	11
	KELLOGG'S—RICE KRISPIES TREATS/BOX	F212	11
	KRAFT SINGLES—CHEESE SLICES	F132	11
	MAYBELLINE GREAT WEAR—FOUNDATION	D114	11
	NIKE—SNEAKERS MEN	A131	11
	PEPCID AC	D213	11
	PEPPERIDGE FARM—DISTINCTIVE COOKIES	F163	11
	PEPSI	F221	11
	POST—WAFFLE CRISP CEREAL	F122	11
	VAN CAMPS—CANNED BEANS	F143	11

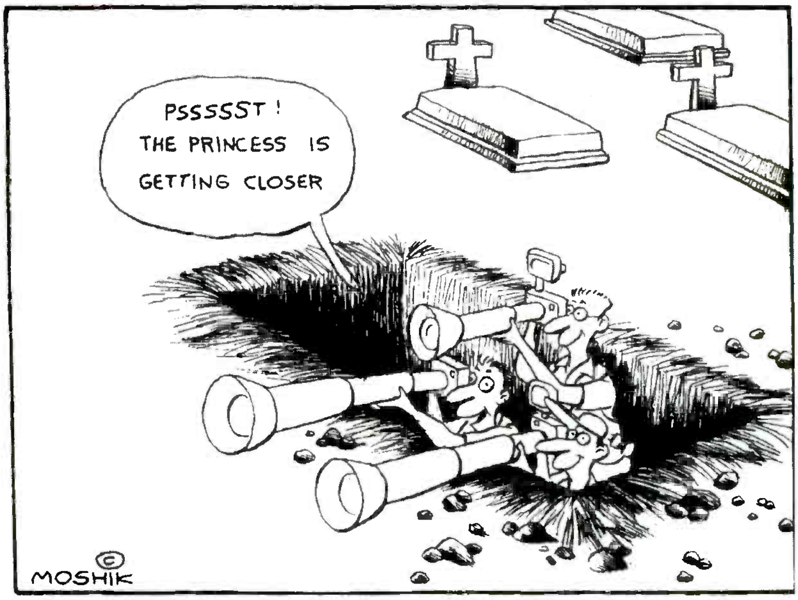
Ranked in order of total spots. Includes ABC, CBS, NBC, FOX, UPN and WB. Regional feeds are counted as whole spots. Spots indexed to average spots for all brands advertising in prime time, i.e., if McDonald's Index=1308, McDonald's ran 1208 percent more spots than the average. Source: Competitive Media Reporting

Media Watch

ROYAL OBSERVATIONS

This selection of editorial cartoons on the death of Princess Diana is from publications around the world that contribute to the Cartoonist & Writers Syndicate. CWS represents some 350 cartoonists in more than 50 countries.

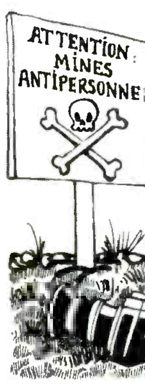
"The tragedy has evoked an unprecedented response in the world press," said Jerry Robinson, CWS editorial director. "While the style, metaphors and symbols differ, the cartoons reflect the intense interest and emotions caused by the death of Princess Diana."



CARTOONISTS & WRITERS SYNDICATE (5)

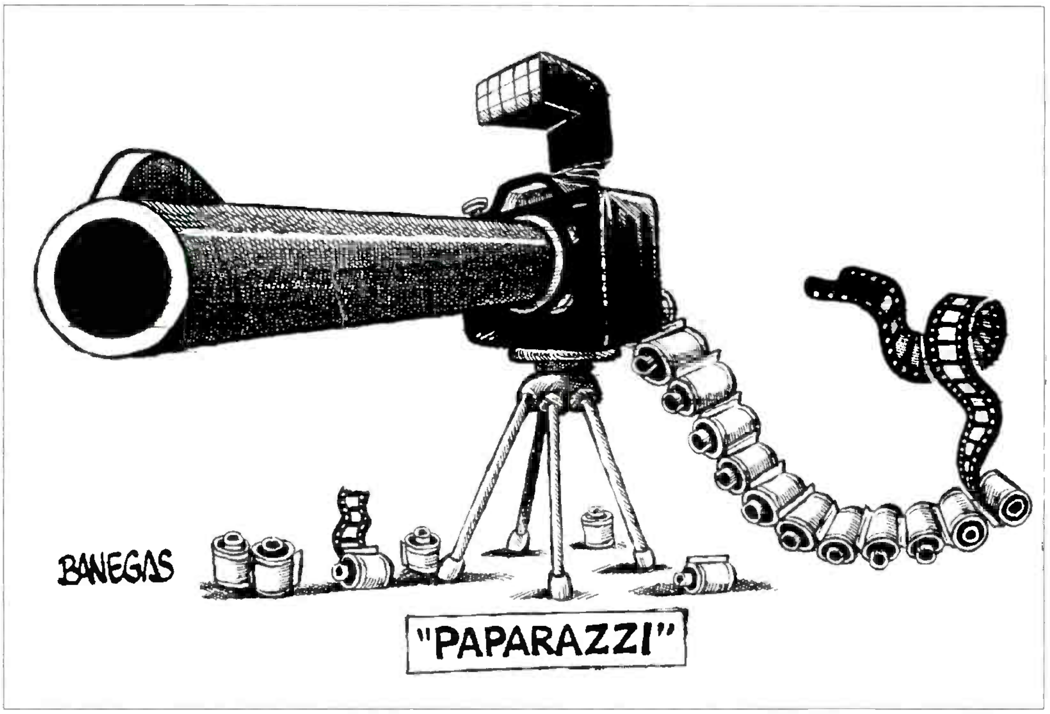
MOSHIK; *DAVAR*, TEL AVIV

VEENENBOS; *DER STANDARD*, VIENNA



GABLE; *THE TORONTO GLOBE AND MAIL*, TORONTO

PLANTU; *LE MONDE*, PARIS



BANEGAS; *LA PRENSA*, SAN PEDRO SULA, HONDURAS

Media Person

BY LEWIS GROSSBERGER


Gothamite@aol.com

Diana Still Dead!

WAS THE PRINCESS KILLED BY PHOTOGRAPHY? THAT is the media issue of the year, if not the millennium. After reading 2,716 columns and editorials on the subject as well as innumerable opinions by TV commentators and radio talk-show hosts, guests and callers, Media Person has finally reached a definitive and judicious conclusion: Shut up, all of you! So we had the commentators. And then we had the commentators who commented on the commentators' comments. (MP's favorite: Maureen Dowd of *The New York Times*, who dared to think the journalistically unthinkable: "Maybe there is no larger lesson in her death.") And now comes Media Person to comment on the commentators who commented on the commentators' comments. Would somebody please shoot me?

But there are other important issues in this royal tra...trag.... Sorry, the word is so overused, MP can't bring himself to type it. There are other important issues in this bad thing that happened that are not being addressed by anyone.

For instance: Are we sure Prince Charles is a fit father? What kind of example is being set for the future king and the future brother of the king by a man who wears skirts? But enough of the big issues.

Perhaps the paps were simply paying tribute to their most lucrative celebrity the only way they knew how, by taking the final photos.

A Really Lame Idea That Has Congealed Into a Media Institution: Those ridiculous event logos tacked onto big running stories by TV and newspapers: The Tragic Princess. The People's Princess. Death of a Princess. Tragic Death of a Tragic People's Princess. These instant clichés sound sillier and sillier as they pile up like highway billboard clutter while you flip from one network or publication to another and each has its cutesy little title, which sounds like all the other titles.

Horror of Horrors: Does Diana's demise mean the end of *People* magazine? If I'm the editor, I'm in total hysterical panic. Di was the cover of *43 issues*. It's as though *Mad* had lost Alfred E. Neuman. Face it, the princess was the franchise. As a cover girl, Camilla Parker Bowles just doesn't make it.

Sex War: It seems to Media Person that the American public's affections for the former princess (now an angel en route to saint) divide mainly along gender lines. MP sees a lot of males shrugging or even (shudder) *joking* when the subject of Diana comes up, whereas females are instantly reduced to weeping. The reason? Women sympathized with Diana because she was treated horribly by her man, something they could all (except Maureen Dowd, apparently) identify with.

Thoughts from two anonymous *Newsweek* writers (males, of course), constantly frustrated because they can never get anything amusing into the magazine:

1. "I don't see why everyone is so down on paparazzi. Ansel Adams did the same thing with animals and nobody minded."

2. "Was Dodi aware that marrying the Princess of Wales would not automatically make him the prince?"

Speaking of Dodi, when will the ever-snooty, pretentious *New York Times* stop referring to Emad Mohamed al-Fayed, a name that causes the reader to come to a full stop and go, "Who?"

Guess Who Flunked Public Relations 101 in Royal Finishing School: The Queen fails to make public statement until subjects practically storm the palace. Fails to upgrade funeral to pomp & bagpipe & marching redcoats humdinger of all time. Palace flagpole goes empty. Brits boil. But of course it's no wonder these royals haven't a shred of common sense. They're not commoners.

MP's favorite amateur commentator of the week: A caller to WABC talk radio in New York who worked himself up into a lather against those "pavarottis" who killed the princess.

Among the less musical epithets awarded the paparazzi: Ghouls (N.Y. *Daily News* page-one banner); Sharks (eyewitness at the scene); Jackals (the *Times*' A.M. Rosenthal); the Rottweiler. Oops—Sorry, that's what Di called Camilla.

Media Person is starting to sense that these paparazzi guys aren't very popular.

And then it turns out one of those arrested bears the last name of Rat. The gods of cheap irony never sleep.

Nobleman: According to a report, one pap at least managed to rise briefly above ratnicity. He took the mortally wounded Diana's pulse and only then went on shooting. And people say they have no feelings.

The paparoozies may well be cold, calculating and money-crazed, but clever they're not. After all, not one realized he could have struck it rich by ignoring the victims and taking pictures of his fellow ghoulish rat jackals taking pictures of the wreck. Every media outlet would've bought those. Hey, perhaps the paps were simply paying tribute to their most lucrative celebrity the only way they knew how, by taking the final photos. Well, it's possible.

No it isn't.

As for A.M. "The Ultimate Authority" Rosenthal, who thundered from his mountaintop that this whole business was really about money and that the editors who buy the photos and the public that buys the papers that print the photos are also to blame—Abe, you have such a forceful way of stating the obvious.

Readers under 35: Name the geriatric performer and ancient TV show that inspired this week's headline and win a Junior Show-Biz Historian Certificate! ■