MEDIAWEEK

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Agency researchers say lack of counterprogramming works to cable's gain PAGES 4-5

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At Deadline

AAAA SEEKS FTC INPUT ON NIELSEN ISSUE

Friction between the American Association of Advertising Agencies (AAAA) and Nielsen Media Research came to a head last week when the AAAAs filed a "confidential inquiry" with the Federal Trade Commission, asking the regulatory body to investigate "whether Nielsen was engaged in any uncompetitive business practice," said Adonis Hoffman, AAAAs' senior vp and legal counsel. The FTC withheld comment on the content of the inquiry, but Donna Campbell, vp of AAAAs' media services division, said the organization's intent was to put the FTC in contact with agencies that have been complaining for "close to 10 years" about "what could be viewed by the FTC as extreme monopolistic practices," including "300 to 500 percent rate increases over the last couple of years." "This level of frustration with the AAAA is new," said Jack Loftus, Nielsen senior vp of communications. "It sounds like they had a bunch of agencies in a room talking about pricing." Nielsen, which is a unit of VNU, publisher of *Mediaweek*, has also been accused of using proprietary information of third-party data processors, which provide services such as "fusion" analyses for agencies that license data that Nielsen owns. Loftus said "all of the major third-party processors" have now signed contracts or have agreements with Nielsen and that fees are a "non-issue." Said Stanley Federman, CEO of Telmar, one of the larger media software providers: "We're still talking, but we haven't signed anything. There are still some issues out there."

NBA TV SIGNS CABLE DEALS

NBA TV has signed multiyear carriage agreements with three cable operators, making the digital network available to 20 million more homes. In total, NBA TV will pass a total of 45 million homes via cable or satellite. Beginning in October, NBA TV will be available to subscribers of Time Warner Cable, Cox Communications and Cablevision. Programming will include four nights a week of live NBA games, including high-definition telecasts, some NBA playoff games, WNBA games and other hoops-related shows.

COURT BARS BREAKUP OF SEATTLE JOA

A County Superior Court judge in Seattle late last week barred *The Seattle Times* from dissolving a 20-year-old joint operating agreement with its rival, Hearst Corp.'s *Seattle Post-Intelligencer*. The ruling means the *Times*, owned by the Blethen family, cannot trigger a clause that would end the agreement and possibly lead to the demise of the *P-I*. Under the JOA, the *Times* handles the circulation, distribution and other non-news functions for both papers in exchange for a greater share of their joint profits. The *Times* had argued that the agreement is no longer financially viable and invoked a provision that allows the parties to end the JOA if the partnership sustains three consecutive years of financial losses.

NBC'S *COUPLING* FINDS ALTERNATE STATIONS

NBC at the last minute found two stations to air Thursday 9:30 p.m. sitcom *Coupling*, replacing Bonneville International's KSL-TV in Salt Lake City and Notre Dame's WNDU-TV in South Bend, Ind. The two NBC affiliates deemed the remake of the British sitcom too raunchy. Cable channel WSBT, the UPN affiliate in South Bend, and KUWB-TV, Acme Communications' WB affiliate in Salt Lake City, picked up the sitcom, which will air at 10 p.m. local time.

ADDENDA: UPN has signed a new multiyear affiliation agreement with nine Fox Television Stations, covering all nine Fox-owned UPN affiliates... **Peter Chrisanthopoulos**, most recently president/COO of sales and marketing for Pappas-owned Azteca America Television Station Group, has been promoted to president/COO of Pappas Telecasting Companies, overseeing all facets of the company...Comedy Central last week signed British comedian **Graham Norton** to a two-year deal that next summer brings an American version of his hit talk/variety show *So Graham Norton* to the network...Hill, Holliday has opened a broadcast buying office in San Francisco and named **Andrea Bouchante** the associate media director in charge...MTV canceled ***The New Tom Green Show*** citing declining ratings...**iBiquity**, the sole developer and licenser of digital broadcast technology for radio, will announce this week that more than 280 radio stations in 100 markets broadcast digitally or plan to in the next few months. However, the rollout of digital radios is about a year behind schedule.

CORRECTION: A page 4 news story in last week's issue on AOL's plans to advertise in Super Bowl XXXVIII gave the wrong air date for the sports event. The Super Bowl will air on Feb. 1, 2004.

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Eddy Hartenstein pledges to expand DirecTV's local market reach Page 8

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Market Indicators

NATIONAL TV: CALM
Advertisers are sitting tight to see how shows fare during the first week of the new season. There is still plenty of fourth-quarter availability for scatter at what are largely negotiable prices.

NET CABLE: STALLED
Upfront holds have mostly gone to order, but nets are not writing scatter business as quickly as expected. Scatter CPMs are flat to slightly above upfront pricing depending on the network.

SPOT TV: ACTIVE
Stations still have plenty of inventory heading into fourth quarter, despite healthy activity from auto, home improvement and financial. Entertainment is starting to come back.

RADIO: MIXED
Except for a handful of markets such as Los Angeles, Phoenix, San Diego and Houston, local advertising is still soft due to spotty retail. National is healthy. TV tune-ins for November and retail holiday could tighten up the marketplace.

MAGAZINES: BUSY
As fourth-quarter issues close, women's service/lifestyle books are pulling advertising from food, housewares and packaged goods. Men's lifestyle books are hot with electronics and auto. First-quarter is filling with auto and drugs and toiletries.

Media Wire

Viacom Trims Forecast Due To Local Ad Sales Slump

Blaming weakness in local advertising, Viacom last week lowered its previous earnings and revenue forecast for the year. The media giant, which depends on local ad sales for roughly one-fifth of its revenue through its outdoor, radio and TV station divisions, said it expected to deliver mid- to high-single-digit revenue growth for the year, rather than its earlier projections of high-single-digit growth.

"While the economic recovery has translated into robust national advertising sales growth, the pace of recovery in local advertising markets going into the fourth quarter is not as rapid as had been anticipated," said a company statement. Through the first half of the year, Viacom's radio group, Infinity Broadcasting, was down 2 percent, while outdoor was up 9 percent and TV up 7 percent.

The persistent slow pace of local ad growth took Viacom and other media companies by surprise. Most radio and TV owners have expected a strong finish to the year. Jason Helfstein, an analyst with CIBC, said he doesn't expect radio, which reported flat local ad growth in July, to pick up until March. Boosted by Olympics and political advertising, TV stations are expected to rise 10 percent to 11 percent in 2004, predicts the TV Bureau of Advertising. *—Katy Bachman*

DVRs to Steal $5.5 Billion In TV Ads: Yankee Report

As the latest report on digital video recorder (DVR) penetration made the rounds of ad agencies last week, it became clear to most that the commercial-skipping devices are here to stay.

Authored by Boston-based Yankee Group, the report forecasts that 19.1 million homes will have DVRs by 2007. Currently, 70 percent of those homes fast-forward through 80 percent of commercials. If that continues, about $5.5 billion in advertising will be not be seen in '07 if the primary method of marketing is still the 30-second spot, according to Yankee Group analyst Adi Kishore.

While the data seemed overly dramatic to some, Yankee Group's reports and others' have *(continued on page 6)*

Viewers Leaving Broadcast Nets

Agency execs blame lack of counterprogramming, cable alternatives

NETWORK TV **By John Consoli**

The broadcast networks' habit of programming similar shows against each other to claim ratings victory on a given night is contributing to growing viewer flight to cable, according to media agency research executives who have analyzed the first few nights of the new fall prime-time season. While each of the six networks had some positive ratings stories to crow about during the official start of season last week, the research execs believe the networks' continuing move away from counterprogramming will cause their share of audience to shrink further.

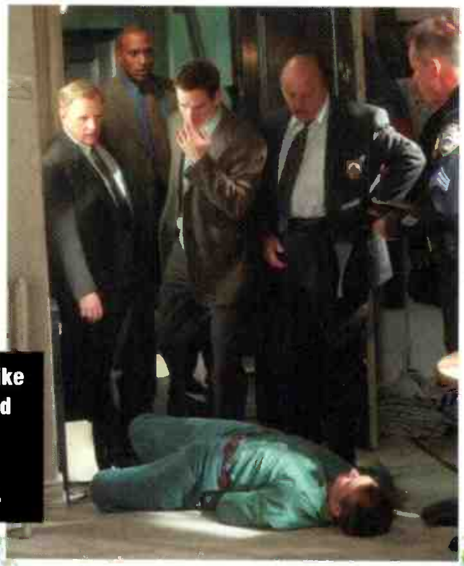
"The networks' strategy of putting on similar shows to their competitors' in the same time periods to steal audience might work in the short-term, but it is shortsighted," said Steve Sternberg, senior vp/director of audience analysis, Magna Global USA. "Most networks have come to believe that their standing in the ratings race is more important than long-term viewership. Some networks would rather lose 5 percent of their audience and move up to No. 1 than grow their audience and stay in second."

A prime example of this potential audience flight to cable can be seen Tuesday at 10 p.m. NBC this season moved its Friday cop drama *Law & Order: SVU* to that time slot, where it competes directly against ABC's cop drama *NYPD Blue*. In addition, both shows skew older and draw a similar audience to the CBS 10 p.m. drama *Judging Amy*. *SVU* took a chunk of the audience away from both *Blue* and *Amy* last week, but the time period as a whole lost 3 share points from premiere week last year. *Blue*'s share fell from 15 percent to 12 percent; *Amy*, which aired its first episode the week after premiere week last year, fell from 18 to 14. Only *SVU* posted a 15 share, up from the 12 share *Dateline* recorded in the time period last season.

Two 10 p.m. cable shows picked up viewers who didn't want to choose from the three similar broadcast shows: FX's plastic surgery drama *Nip/Tuck* and Bravo's reality hit *Queer Eye for the Straight Guy* (*see related story on page 5*).

The broadcast nets are running several other similar shows against each other: *The District* (CBS) vs. *LA Dragnet* (ABC) Saturday at 10 p.m.; *Cold Case* (CBS) against *10-8* (ABC) Sunday at 8, as well as *The Lyon's Den* (NBC) vs. *The Practice* (ABC) at 10; and *The Handler* (CBS) facing *Boomtown* (NBC) Friday at 10.

"The broadcast networks should do more counterprogramming," Sternberg said. "They can counterprogram and still increase their audience." He pointed to Thursday night as a rare instance of counterprogramming that benefits the competitors. "CBS put reality show



When similar shows like *NYPD Blue* (above) and *L&O: SVU* run against each other, some viewers turn to cable.

TOP: DANNY FELD/ABC; BOTTOM: WILL HART/UNIVERSAL

Survivor at 8 p.m. against the NBC sitcoms, and both have done well. And it moved *CSI* to 9 p.m., also against comedies, and both do well. And at 10, *Without a Trace* [on CBS] is a different type of drama than [NBC's] *ER*."

Brad Adgate, senior vp of corporate research at Horizon Media, agreed with Sternberg, pointing to the 1984 season, when NBC premiered *The Cosby Show*, a sitcom, at 8 p.m. on Thursday, which drew a solid audience against CBS' hit drama *Magnum, P.I.* But Adgate added that today, "there is so much ad money involved, and with each network getting ratings each day, the networks feel safer putting on a genre that is already working in a time period rather than trying something different. The top networks don't want to take risks, so they err on the side of caution."

Sternberg said longer-term problems loom for broadcasters, three days into the season. The six nets in prime time cumulatively lost 2 share points in households and 3 in adults 18-49, while ad-supported cable climbed 5 household share points and 5 in 18-49s. "It's still very early in the season, [but] it bears monitoring," Sternberg said. "If it continues, it certainly is a reason for the networks to be alarmed."

While all of last season's hit shows got strong viewer sampling in their season premieres last week, most were down in the ratings from last year. For example, CBS hit sitcom *Everybody Loves Raymond* pulled a respectable 6.5 in adults 18-49, but that was down 18 percent over last year's season premiere. CBS' *CSI: Miami*, *Survivor* and *CSI*, as well as NBC's *Friends* and *E.R.*, also were down from last year's premieres. In fact, CBS was down across the board for the first four nights, and NBC, which was up for the first three nights, was down 17 percent in 18-49s on its powerhouse Thursday.

ABC was up 10 percent in households and 12 percent in 18-49s for the first four days. A big chunk of that gain was due to heavy tune-in to see the late John Ritter in *8 Simple Rules* (Tuesday at 8) and better performances by *The Bachelor* (Wednesday at 9) and *Extreme Makeover* (Thursday at 9).

Among new shows, CBS sitcom *Two and a Half Men* recorded a solid 5.9/14 in adults 18-49 leading out of *Raymond*. On the downside, NBC's two new sitcoms *Whoopi* and *Happy Family* (Tuesday 8-9 p.m.) showed steady ratings declines for the second straight week; ABC's *Threat Matrix* on Thursday at 8 p.m. is hanging by a thread after two weeks of soft ratings (a paltry 1.9 in 18-49s); and CBS drama *The Brotherhood of Poland, N.H.*—against NBC powerhouse *Law & Order* Wednesday at 10—recorded a modest 2.4 in 18-49s and is probably destined for early cancellation. ■

Share and Share Unlike

Onslaught of broadcast season premieres fails to stem cable advances

CABLE TV **By Megan Larson**

Ad-supported cable, to the delight of its programming executives, held its ground as the major broadcast networks premiered their lineups for the new season. While there were 19 new dramas and comedies that premiered on the six broadcast networks during the 10-day period (Sept.15-24) as well as returning favorites, continuing audience fragmentation and the general desire for something different helped cable's ratings grow while broadcast dipped from last year.

Nip/Tuck (with Dylan Walsh) grew against premiere week.

PRASHANT GUPTA/FX

"I think it was predictable based on the growth spurt cable had this summer," said Aaron Cohen, executive vp/director of broadcast at Horizon Media. "There is no reason to believe that those people who grew to enjoy *Nip/Tuck* or *Queer Eye for the Straight Guy* would stop watching when broadcast was putting up new shows not as interestingly positioned."

According to Horizon Media's analysis of Nielsen Media Research data, cable gained 4 household share points—the largest gain in recent years—to capture 50 percent of the TV audience.

Bravo, FX, Hallmark Channel, CMT, VH1 and the Weather Channel posted significant household gains over the same period last year. The individual share of audience held by each broadcast network was flat with the exception of NBC, which was down a share point.

"There is increasing recognition by viewers and advertisers of cable's first-run fare," said John Rash, senior vp/chief broadcast negotiator, Campbell Mithun. "This shouldn't be a zero-sum game."

On Sept. 22 and 23, Cartoon Network's *Yu-Gi-Oh!*, A&E's *Biography* and Discovery's *American Chopper* grew ratings in their respective time period over last year. Popular summer series MTV's *Newlyweds: Nick and Jessica* and Bravo's *Queer Eye* dipped slightly from previous weeks but still held strong ratings. *Newlyweds* delivered 2.4 million persons 2-plus, and *Queer Eye* attracted 1.7 million adults 18-49 and 25-54.

On Sept. 23, despite strong competition from broadcast, which premiered new seasons of *Law & Order: SVU* (NBC), *Judging Amy* (CBS) and *NYPD Blue* (ABC), FX's hit *Nip/Tuck* enjoyed its highest ratings of the season. The 10 p.m. airing of *Nip/Tuck* drew 3.7 million viewers 2-plus and 2.7 million adults 18-49 and 25-54.

"We were floored," said FX president Peter Liguori, about the show's performance during broadcast premiere week. "We definitely benefited from the overall rise in viewership; [but] as the TV environment gets more competitive, those networks presenting original material will survive."

There is some thought among research executives that competitive network dramas are canceling each other out, particularly when they are in the same genre and time slot (*see related story on previous page*).

"I have always said that spending corresponds with viewer interest," said Rash. "And if the viewer is taken with *Taken* or *Nip/Tuck*, then commensurate ad dollars will follow." ■

Lessons of the Fall

A week into the season, buyers see some missteps from the networks

TV PROGRAMMING **By A.J. Frutkin**

As fall premieres continue to roll out, the broadcast networks already are learning some hard-knock lessons.

Whoopi's three-week decline on NBC Tuesday at 8 p.m. bodes poorly for the comedy. Even if the show survives unusually high interest in ABC's *8 Simple Rules*, NBC may need more than half a season to win viewers' hearts, buyers said. And with Fox's *American Idol* on the horizon, it may not have enough

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forced many media buyers to think of alternative ways to convey clients' messages. "If accurate, this could lead to a seismic shift in the economic infrastructure of the marketing industry," said John Rash, senior vp/director of broadcast negotiations for Campbell-Mithun.

Even so, studies from Starcom MediaVest Group have shown that DVR users actually watch more TV because the programming fits their schedule.

DVR adoption to date has been slow (about 2 percent of U.S. TV households), but with the aggressive rollout of the DirecTV/TiVo set-top box, EchoStar's DVR (it just hit the 1 million mark last week) and launch of DVRs from Time Warner Cable and Cox this year, penetration will pick up. "Our attitude is that DVRs are here to stay, so get over it," said Tim Hanlon, vp/director of emerging contacts for Starcom MediaVest Group. "You have to change the way you approach the medium." *—Megan Larson*

Univision, Hispanic Broadcasting Merger a Done Deal

In a move that could open the way for more cross-media advertising deals in the Spanish-language media, Hispanic TV giant Univision Communications closed its purchase of radio company Hispanic Broadcasting Corp., after getting federal approval last week.

The deal joins 65 HBC radio stations to the 53 TV station Univision empire, which includes Telefutura Network stations. "This is a huge step forward...it clearly reflects the increased importance and relevance of the Hispanic market," said Jose Lopez Valera, vp/managing director of Hill, Holliday's Hispanic Marketing practice in Miami. Valera said Hispanic shops will now be able to negotiate multiplatform cross-selling deals, long part of Anglo media offerings.

Not everyone is happy. Democrats on the Federal Communications Commission warned the merger lets Univision come dangerously close to being a monopoly. The FCC's Republican majority countered that Spanish speakers can choose from 26 TV networks on cable, broadcast and satellite, and from hundreds of radio stations not owned by Univision. *—Todd Shields*

time. "As a comic, Whoopi Goldberg is a uniquely polarizing figure, which makes her humor an acquired taste," said John Rash, senior vp/director of broadcast negotiations at Campbell Mithun.

Elsewhere, the WB's premiere of *One Tree Hill* performed below expectations Tuesday at 9 p.m. But following the exit last season of *Dawson's Creek*, buyers said moving former *Gilmore Girls* lead-out *Smallville* to Wednesdays was a must. "It's easier to come up with something that works behind *Gilmore Girls* than it is to start off Wednesdays," said Steve Sternberg, senior vp/director of audience analysis at Magna Global USA.

Despite what was perceived to be strong audience flow between *Star Trek: Enterprise* and *Jake 2.0*, the latter's lackluster telecast on Sept. 24 on UPN reaffirmed Sternberg's belief that the post-*Enterprise* slot is nearly impossible to program. "Trekkies don't care what's on before or after, they're tuning in to watch *Star Trek*," said Sternberg.

***Wanda*, with Sykes and Phil Morris, sputtered in its debut.**

Against NBC's *Law & Order*, David E. Kelley's CBS drama *The Brotherhood of Poland, N.H.* launched to low numbers at 10 p.m. (*see related story on page 4*). But some buyers continue to support the network's scheduling strategy. "Everyone has to try to see what sticks there, and if the goal is to put a good show on at 10, I think CBS succeeded," said Kris Magel, senior vp/group director of national broadcast for Optimedia International (US).

With CBS and NBC drawing the majority of viewers on Thursdays, buyers also see ABC's counterprogramming strategy on the night as competitive, if somewhat half-baked. While *Extreme Makeover* has performed admirably at 9 p.m., its lead-in, *Threat Matrix*, appears to be a poor fit.

"It just seems like they've set the show adrift there," said Shari Anne Brill, vp/director of programming at Carat USA. "And if you go back to programming 101, you don't start a night with a new show."

Perhaps the week's most surprising disappointment was Fox's premiere of *Wanda at Large* at 8 p.m. on Sept. 19. After a successful pairing with *The Bernie Mac Show* on Wednesdays last spring, the network hoped the series might draw an untapped ethnic audience on Fridays. "There was good synergy for the audience with *Wanda* and *Bernie Mac*," said Brill. "But a lot of those viewers could very well be out on Friday nights." ■

Not the Only Game in Town

Buyers tell leagues: Ease in-game ad restrictions or risk losing sponsorships

TV SPORTS By John Consoli

Sports media buyers are cautioning the major sports leagues to loosen restrictions on where official sponsors can promote their products—particularly onscreen, in-game mentions—or risk losing some of those dollars to other media that attract young male viewers.

Speaking at Street & Smith's Sports Sponsorship Symposium in New York last week, Tom McGovern, OMD's director of sports marketing, took the National Football League to task for its policy of not allowing in-game enhancements (on-air promotions during telecasts). McGovern, who represents clients including Visa, Pepsi and Federal Express, said as a result, some advertisers, including official NFL sponsors, are forced into pregame shows already jammed with ads. "These sponsors are paying so much money, and they are unable to distinguish themselves," he said.

Larry Novenstern, senior vp/director of national broadcast at Deutsch, who represents clients like Coors Light and Mitsubishi, agreed. "The leagues need to loosen up [restrictions] a bit. Advertisers are paying the leagues for entitlements, and the leagues should allow them to do more," said Novenstern.

One advertiser that dropped its official sponsorships with both the NFL and the National Basketball Association is Miller Brewing Co., which still advertises in the games but chose not to pay for the rights to be called the "official beer" of the leagues. Richard Reider,

Spengler sees ways past league limits.

manager of sports and entertainment marketing for Miller, said although the brewer paid both leagues hefty fees to be an official sponsor, it still had to negotiate separate local market rights with each of the individual teams. "We can't use the [NFL logo], but we can still advertise in the game," said Reider.

NFL representative Greg Aiello said the topic of in-game enhancements "comes up in discussions with the networks from time to time," but added the league "has no plans to change the policy at this time."

With prime-time reality shows offering more product-placement opportunities—and attracting young men—the sports leagues risk losing revenue. Novenstern cited Mitsubishi's involvement with NBC's *The Restaurant*. Other examples include Coke's and Ford's involvement in Fox's *American Idol*, and Adidas' and Pontiac's presence in *Survivor* on CBS.

"The networks are doing a better job of realizing that the business model has changed," said Tim Spengler, executive vp/head of national broadcast at Initiative, which represents major sports client Home Depot, among others. "They are opening up their assets more and allowing advertisers to use those assets. This has allowed advertisers into TV events without buying a sponsorship [with a league]." Spengler cited a deal Initiative did for Home Depot with ESPN. As part of the deal, Home Depot built the traveling *College Game Day* set—and the show tacked on *Built by Home Depot* to its name.

How can the leagues be convinced to loosen up? Reider suggested that "in the past, [advertisers] were not willing to walk away. You have to be willing to walk away." ■

DirecTV Touts Local Rollout

To curry favor for News Corp. bid, service to be in all 210 markets by '08

SATELLITE TV **By Todd Shields**

DirecTV chairman/CEO Eddy Hartenstein said last week his company will spend $1 billion to expand its provision of local TV channels to all 210 TV markets by 2008 at the latest. The pledge sharpens satellite's competitive challenge to cable, even as it sweetens the pot for federal regulators considering whether News Corp., under chairman/CEO Rupert Murdoch, should be allowed to buy DirecTV.

Few expect Washington's vetting agencies to outright block the deal linking the No. 1 direct-broadcast satellite provider with Murdoch's Fox brands, which include a TV network, 35 TV stations, a movie studio and cable news and entertainment networks.

But many expect the Department of Justice or the Federal Communications Commission to attach conditions to the deal. In an indication of the unease stirred by the prospect of Murdoch wielding both programming and distribution clout, two U.S. senators in a letter last week warned the deal risks "injury to competition and consumers."

Sen. Mike DeWine (R-Ohio), who chairs the antitrust subcommittee, and the panel's ranking member, Sen. Herb Kohl (D-Wis.), told the DOJ and the FCC that "this transaction should be approved only upon the adoption of certain conditions." The senators called for Fox Sports programming to be available to DirecTV's competitors, presumably No. 2 DTV rival EchoStar. Murdoch, in Capitol Hill appearances earlier this year, assured lawmakers Fox will pursue the widest distribution possible. The senators want that graven in stone.

Hartenstein anticipated another of the senators' concerns with his 210-market pledge, made before satellite retailers gathered in Washington by the Satellite Broadcasting and Communications Association. The companies made the same promise in a filing to the FCC, where officials will count additional local service favorably. Hartenstein said the move from the current 64 markets to all 210 could happen as early as 2006. He gave credit to News Corp. "On the most basic level, News Corp. 'gets it.' And they get us," Hartenstein said.

Not all is sunshine. SBCA president Andy Wright said Congress next year could weaken or kill the Satellite Home Viewers Improvement Act, the 1998 legislation that allows satellite companies to offer local channels. If that happens, Wright told the retailers, "You will lose millions of customers." Wright also urged a strong lobbying effort against Northpoint Technology Ltd., which is asking Congress to grant it spectrum for a video service sharing satellite's spectrum. ■

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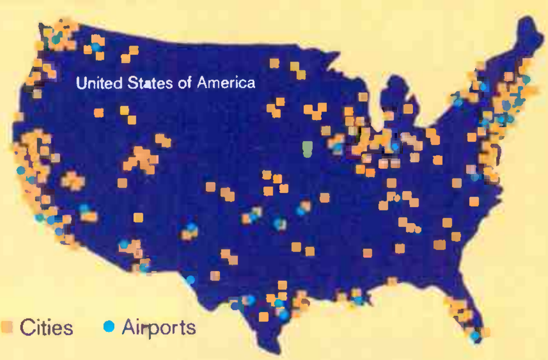

RADIO

Radio Execs Struggle to Stay Tuned to Planner, Client Needs

BY KATY BACHMAN

In April, when Viacom COO Mel Karmazin blasted the weak performance of Infinity Broadcasting, the company's radio division, he also took the radio industry to task for poor marketing of the medium that made them all rich on Wall Street. His comments set off a wave of dialogue in the industry that will continue this week when the annual NAB radio show opens in Philadelphia.

Radio execs have cause for concern. In the last 10 years, although the percent of the population tuning in to radio has remained fairly constant, listeners on average spend at least three hours less time listening to radio per week (a 14 percent decrease) than in 1993, according to Arbitron. And while the economy has not been favorable to any medium, radio, normally resilient, has been struggling, especially locally, where it derives 80 percent of its revenue.

"It's radio's fault it's sluggish. It's not sluggish because there is no money for it. The fact that fourth quarter is not on fire blows my mind," said Rich Russo, director of broadcast services for agency JL Media. "Nobody is selling the value of the medium."

"We need to be pitching our tent outside the buyer's office, but we also need to make our case with planners, creative departments and top executives." SYKES

Broadcasters that once racked up yearly growth by buying up radio properties are turning their attention back to the basics of improving content and increasing ad revenue.

"Radio controls 40 percent of the time spent with media and gets only 8 percent of revenue share," John Sykes, CEO of Infinity told investors at a recent Kagan World Media seminar. "Sure we need to be pitching our tent outside the buyer's office, but we also need to make our case with the planners, the creative departments and top executives."

Planners agree that radio won"t grow by focusing its attention on buyers. "Radio needs to stop preaching to the converted; buyers are only placing what was planned," said Lee Doyle, managing partner and director of client services for Mediaedge:cia.

As a result, radio takes a back seat to other media. "Most planners don't really know how to utilize radio," said Jon Dobbin, senior vp/group director at Mediacom, who handles the Diageo liquor account. "We have to be more convinced of the power of radio as a branding device rather than a support vehicle for magazines or TV."

Along with making the case to planners, radio also needs to concentrate less on Wall Street, reduce clutter and get back to programming, say planners. "Radio has a great connection between the audience and personalities, but the radio industry is selling that out," said Doyle. "They're homogenizing the airwaves."

"The industry is in danger of killing the golden goose," agreed John Hogan, CEO of Clear Channel radio, the company that's been the poster child for consolidation gone bad. Hogan has initiatives slated for 2004 aimed at reducing spot loads and making sure spots run as ordered. "Reducing spot load will improve the sound of stations and make the inventory we have more valuable," explained Hogan. "We've also been guilty of not doing a very good job delivering spots purchased, and we're going to put an end to that."

Radio executives are also attempting to raise the medium's profile. In May during the TV network upfront presentations, Clear Channel hosted an "outfront," positioning radio and outdoor as an alternative buy to the billions spent annually in network TV. And last month, Interep, the national rep firm for Infinity, began calling on a list of 450 planners and account managers representing more than 300 brands.

"We're going to find out what we need to do as an industry to increase radio's share," said Jeff Dashev, president of sales for Interep. "Do we have a creative problem? A cost problem? Is it a technology problem because we're far behind with electronic data interchange?"

The answer is yes all around. ■

MEDIA RESEARCH

BIA Financial Ads 1,400 Newspapers to Database

If Congress and the critics of consolidation fail to stop the Federal Communications Commission's new cross-ownership rules, several newspaper companies, such as Gannett, Tribune and Media General, have set their sights on snapping up local broadcast outlets. In order to help the industry track multimedia ownership and advertising revenue in local markets, BIA Financial Network this week will introduce its new database of 1,400 newspapers, alongside its current databases of radio and TV stations. BIA's newspaper database also includes circulation data, information on pending and completed transactions, as well as contact information for more than 8,700 key newspaper personnel and owners. With the addition of the newspaper data, BIA now offers the industry's only cross-media view of ownership, revenue and performance across all markets. —*KB*

Ad Revenue by Medium in Top 5 Markets

MARKET (RANK)	NEWSPAPER	TV	RADIO
NEW YORK (1)*	$3,075	$1,544	$912.2
LOS ANGELES (2)*	$1,540	$1,442	$1,030
CHICAGO (3)	$1,169	$831.7	$559.0
SAN FRANCISCO (4)*	$993.9	$737.3	$478.5
PHILADELPHIA (5)*	$887.1	$617.2	$371.6

SOURCE: BIA FINANCIAL NETWORK, 2002 AD REVENUE IN MILLIONS BY NIELSEN DMA MARKET. *NEW YORK, LOS ANGELES, SAN FRANCISCO AND PHILADELPHIA INCLUDE MORE THAN ONE RADIO MARKET.

This MINI campaign came out in March.
People got excited. Stickers, how fun.
They put a cow in the sky,
a lighthouse in the mountains,
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And suddenly they wanted it
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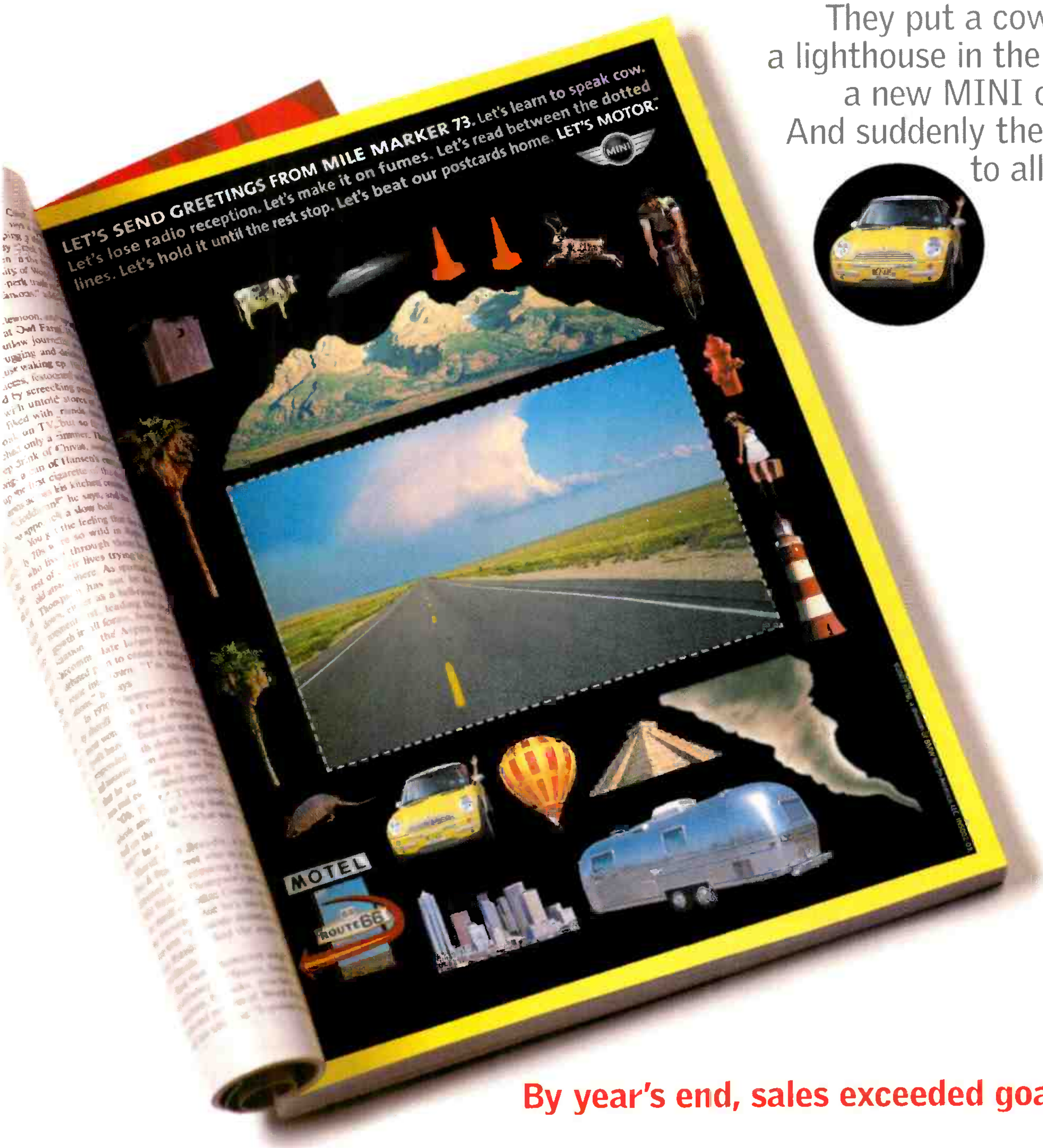

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market profile

BY EILEEN DAVIS HUDSON

Atlanta's growing traffic woes have spurred WXIA, Gannett's NBC outlet, to move its 5 p.m. news to 7.

KEN BIGGS/STONE/GETTY IMAGES

Atlanta

KNOWN AS THE MEDIA CAPITAL OF THE SOUTH, ATLANTA IS HOME TO TURNER BROADcasting System, including its CNN, TNT, TBS Superstation and Cartoon Network units, among others. Turner parent company Time Warner also owns Major League Baseball's Atlanta Braves, the National Basketball Association's Atlanta Hawks, the National Hockey League's Atlanta Thrashers, and the operating rights to the sports and entertainment center Philips Arena, where the Hawks and Thrashers play.

Time Warner reached an agreement two weeks ago to sell the Thrashers, the Hawks and the arena to a group of investors from Atlanta, Boston and Washington that includes the son-in-law of TBS founder Ted Turner.

Atlanta has the ninth-largest television market in the country with 2.03 million TV households, according to Nielsen Media Research. The city is also the headquarters of Cox Enterprises, which owns three of Atlanta's dominant media outlets in broadcast television, print and radio. Interestingly, the wave of consolidation in the TV marketplace has yet reached Atlanta, one of the few remaining top-10 markets without a duopoly.

Atlanta's perennial news leader is Cox-owned ABC affiliate WSB-TV, which continues to maintain a sizeable lead over its news competitors in various time periods. The station's seasoned on-air veterans are part of the reason it has maintained its position. WSB's main anchor team of John Pruitt, a 36-year Atlanta TV veteran, and 28-year WSB veteran Monica Kaufman are a market staple at 5,6 and 11 p.m.

Last April, WXIA-TV, Gannett Broadcasting's NBC affiliate, opted to shift its resources by ending its 5 p.m. newscast and launching a new half-hour news at 7 p.m. It has no news rivals in the new time period, whereas WSB, Meredith Broadcasting's CBS outlet WGCL-TV, and Fox-owned WAGA all compete for new audiences at 5 p.m. Bob Walker, WXIA president/general manager, says Atlanta's overall growth and subsequent traffic snarls have resulted in more people getting home later, which is why the station moved its news to 7 p.m. "We have twice as many news viewers at 7 o'clock than what we had at 5," says Walker. The 7 p.m. news launched into the No. 2 position in the time period, where it remained in the July sweeps with a 4.4 rating/8 share.

WXIA is also in its second year of running the syndicated *Dr. Phil*, which was moved from 3 p.m. to 5 p.m. with the news change. The station now has a game-show block from 4-5 p.m. with *Who Wants to Be a Millionaire* and *Jeopardy!*

Fox owned-and-operated WAGA is one of the strongest Fox outlets in the country. The station typically finishes second in local news in households at 5 and 6 p.m., competing directly with WSB's hour-long newscasts. WAGA has the market's lone 10 p.m. late news, which also runs an hour. Although it has no direct competition, the 10 p.m. newscast generally finishes second among all the late news. WAGA has also expanded its morning news by a half hour, pushing the start time to 5 a.m. Its morning newscast is followed by its morning news/entertainment show *Good Day Atlanta* from 7-9. WAGA also produces a Sunday-morning news from 10-11 a.m.

CBS affiliate WGCL generally ranks last in local news. Earlier this year, the station promoted Jeff Parsons to news director from assistant news director. While it looks to build up its news audience, WGCL has done well with some syndicated shows. The station picked up *Everybody Loves Raymond* in syndication last year, which it double runs from 7-8 p.m. weekdays.

Tribune Broadcasting's WB affiliate WATL made several changes to its lineup this fall. Namely, it launched *The Sharon Osbourne Show* at 10 a.m. with a sec-

NIELSEN MONITOR-PLUS
AD SPENDING BY MEDIA / ATLANTA

	Jan.–Dec. 2001	Jan.–Dec. 2002
Spot TV	$548,148,256	$530,469,420
Local Newspaper	$396,171,630	$372,566,070
Spot Radio	$225,465,670	$216,283,130
Outdoor	$40,299,610	$42,493,426
Local Magazine	$10,434,780	$12,435,250
Total	$1,220,519,946	$1,174,247,296

Source: Nielsen Monitor-Plus

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- GMC
- Harris*direct*
- Hewlett Packard
- Infiniti
- Instinet
- Jaguar
- Land Rover
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- Sprint
- UBS
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- Verizon

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The 2002 Mendelsohn Affluent Survey, HHI $75,000+, shows Investor's Business Daily has a **higher % composition** and **higher index** than The Wall Street Journal and The New York Times against the following segments:

	IBD % Composition	*IBD Index*
Any Chief Title	34.5%	138
Owner/Partner	12.3%	143
Any Luxury Car Bought New/Used	26.0%	159
50+ Security Transactions	13.2%	612

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SCARBOROUGH PROFILE

Comparison of Atlanta

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Atlanta Composition %	Atlanta Index
DEMOGRAPHICS			
Age 18-34	31	33	108
Age 35-54	41	44	108
Age 55+	29	23	80
HHI $75,000+	29	33	112
College Graduate	12	13	106
Any Postgraduate Work	11	11	101
Professional/Managerial	23	25	110
African American	13	26	196
Hispanic	13	7	56
MEDIA USAGE–AVERAGE AUDIENCES*			
Read Any Daily Newspaper	55	42	76
Read Any Sunday Newspaper	63	53	85
Total Radio Morning Drive M-F	22	21	94
Total Radio Afternoon Drive M-F	18	18	102
Total TV Early News M-F	29	28	94
Total TV Prime Time M-Sun	39	36	92
Total Cable Prime Time M-Sun	14	15	109
MEDIA USAGE–CUME AUDIENCES**			
Read Any Daily Newspaper	74	61	82
Read Any Sunday Newspaper	77	69	90
Total Radio Morning Drive M-F	76	75	99
Total Radio Afternoon Drive M-F	73	73	100
Total TV Early News M-F	71	72	101
Total TV Prime Time M-Sun	92	91	99
Total Cable Prime Time M-Sun	60	64	106
MEDIA USAGE–OTHER			
Accessed Internet Past 30 Days	58	64	110
HOME TECHNOLOGY			
Owns a Personal Computer	68	74	108
Purchase Using Internet Past 12 Months	39	40	102
HH Connected to Cable	68	69	102
HH Connected to Satellite	18	24	134
HH Uses Broadband Internet Connection	14	14	100

*Media Audiences-Average: average issue readers for newspapers; average quarter-hour listeners within a specific daypart for radio; average half-hour viewers within a specific daypart for TV and cable **Media Audiences-Cume: 5-issue cume readers for daily newspapers; 4-issue cume readers for Sunday newspapers; cume of all listeners within a specific daypart for radio; cume of all viewers within a specific daypart for TV and cable.
Source: 2002 Scarborough Research Top 50 Market Report (August 2001 - September 2002)

ond run at 1 p.m., says Steve Carver, WATL vp/gm. Carver was hired to run the station last February. He previously served as regional vp for Tribune Television and vp/gm of WGN-AM Radio in Chicago.

The station now airs a double-run from 7-8 p.m. of *The Simpsons*, which had run from 7-7:30 p.m. followed by *Will & Grace*. That show was moved to 10 p.m. WATL does not produce local news.

CBS-owned UPN affiliate WUPA also does not produce local news. However, the station is working to emphasize its local position. The station changed its on-air brand from UPN69 to UPN Atlanta and has started producing local programming. Last May, WUPA for the first time helped sponsor the annual Music Midtown, Atlanta's largest music festival which draws top recording artists and more than 300,000 fans. Besides serving as one of the event's sponsors, WUPA also produced a half-hour special called *An Insider's Guide to Music Midtown* as well as an hour-long special in August on the Georgia-based 3rd Infantry Division. This division has seen the longest tour of combat duty in Iraq and has suffered the most casualties.

"We want to be vital and vibrant, and in order to do that, you have to be relevant to people who live in the community," says Meg LaVigne, vp/gm of WUPA. (She also oversees sister station WGNT in Norfolk, Va.)

In terms of programming changes, WUPA picked up *The Parkers* in syndication at 7:30 p.m. and *The Wayne Brady Show* at 3 p.m. For 2004, WUPA has acquired the off-net syndie rights to *Girlfriends*, *The Steve Harvey Show* and *Martin*. In 2005, the station will air *The Bernie Mac Show* in syndication. WUPA is in the final year of its four-year deal to air Hawks and Thrashers games. It will carry about 45 total games between the two teams this year, says LaVigne.

WTBS-TV, part of the Time Warner family, is considered a local, commercial broadcast TV station in the Atlanta market, although its programming is nearly identical to its cable sibling TBS Superstation. WTBS does air a local public affairs show on Saturdays.

In October 2002, Univision Communications launched WUVG, Atlanta's first Spanish-language television station. According to U.S. Census Bureau data released Sept. 18, the state of Georgia had the nation's fastest-growing Hispanic population between 2000 and 2002.

Though still in its infancy, WUVG plans to ramp up its local programming. The station currently produces a public affairs show on Saturdays at 10 a.m. called *Nuestra Georgia*. It also produces news briefs on the half hours from 6:30 p.m. to 11:30 p.m. A station representative says WUVG also plans to launch its first full newscast within the next year. The station does not subscribe to Nielsen's ratings service. Paxson Communications' Pax TV outlet in the market is WPXA.

The market's local cable advertising interconnect is Comcast's owned-and-operated Cable Advertising of Metro Atlanta. Established in 1990, CAMA represents Charter Communications, InterMedia Partners, Alltel, Covington Cable, Plantation Cable, Communicomm and Monroe Utilities Network. CAMA inserts local ads on 51 cable networks.

Comcast serves 1.1 million cable households in the market, representing about 70 percent of cable homes in the market. According to Scarborough Research, 69 percent of the market is connected to cable, on par with the top 50–market average of 68 percent. However, 24 percent of the market is hooked up to satellite service, well above the national average of 18 percent. *(continued on page 19)*

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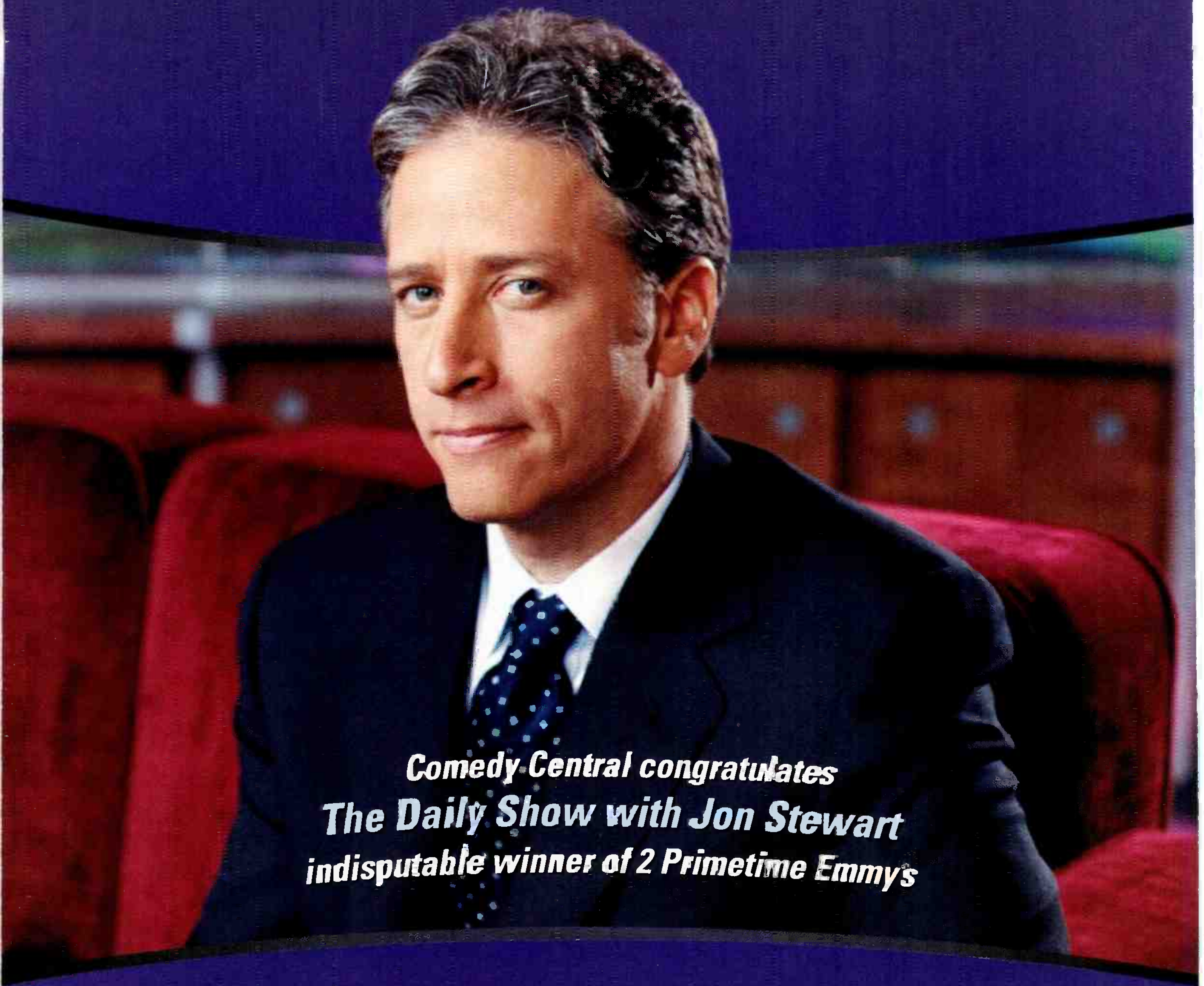

Outstanding Variety, Music or Comedy Series

- **Madeleine Smithberg** Executive Producer
- **Jon Stewart** Executive Producer
- **Ben Karlin** Co-Executive Producer
- **Stewart Bailey** Co-Executive Producer
- **Kahane Corn** Supervising Producer

Outstanding Writing For a Variety, Music or Comedy Program

- **David Javerbaum** Head Writer
- **Rich Blomquist** Writer
- **Steve Bodow** Writer
- **Eric Drysdale** Writer
- **J.R. Havlan** Writer
- **Scott Jacobson** Writer
- **Tom Johnson** Writer
- **Ben Karlin** Writer
- **Rob Kutner** Writer
- **Chris Regan** Writer
- **Jason Reich** Writer
- **Jason Ross** Writer
- **Jon Stewart** Writer

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Special Report

September 29, 2003

Media OUTLOOK 2003

Does size matter?

Media conglomerates say bigger is better; smaller companies tout agility

Ad spending forecasts for:

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Measuring Up

In an economic downturn, is it size, or is it agility, that determines success?

BY RICH BRUNELLI

When news broke in early September that NBC parent General Electric was proposing to merge the entertainment assets of Vivendi Universal into its NBC TV network arm, there was a sense of completion in the media industry. As part of the deal, still pending final approval, NBC would gain control of well-known cable TV brands such as USA Network and Sci Fi Channel. Perhaps more important, however, the Peacock network will take over Universal's film and television production business, the latter of which creates shows such as *Law & Order* and *The District* for network TV and *Crossing Over With John Edwards* and *Maury* for syndication.

When NBC subsumes all of Vivendi's goodies, the company will take the final seat at the table of the true media behemoths—conglomerates such as Time Warner, Viacom, News Corp. and Disney—that control soup-to-nuts operations to create, distribute and cross-promote entertainment content. NBC's inclusion in this select group comes at an intriguing time because the U.S. economy—both the general and the media economies—has been, diplomatically put, challenged. Downsizing, streamlining and plain, old-fashioned cost-cutting have hit nearly every media company in the last two or three years. The picture hasn't been pretty; the pain has been well shared.

A reading of the tea leaves—that is, the collected wisdom of a half-dozen media merchant banks and industry analysts, who predict the economic future with all the accuracy that predictions of the future typically entails—indicates that the economy is beginning to turn around. A shimmering sliver of light is apparently visible at the end of the long, dark tunnel that has been the media business. But the industry is not out of the dark yet, and the growing spheres of influence of the multi-tentacled media companies continue to beg the age-old question: Does size really matter? In other words, do the conglomerates, particularly in the rough sea of a tumultuous economy, have an advantage over their midsized or smaller brethren? Or does the perfect storm of downward-spiraling NASDAQ, Dow Jones and S&P 500 indexes make the larger companies more vulnerable?

Depending on whether you put that question to a small media company or a large conglomerate, you'll get a different answer. But, with the number of mergers that have taken place over the past few years, some observers believe that bigger is better.

"The companies that are disadvantaged and will continue to be disadvantaged are the ones that are not able to bring more than one media offering the table," says Michael J. Wolf, managing partner of the media and entertainment practice at McKinsey & Co. "The ones that can do these huge advertising deals across the full breadth of their properties will be able to get a much bigger share of advertising dollars. And that's what NBC is hoping to gain with Vivendi."

When and if NBC and Vivendi come together, the advertising slump may well becoming a thing of the past...at least that's what the forecasters believe. The record-setting $9.3

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New technologies create targeted opportunities for out-of-home.
BY KATY BACHMAN

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Interactive's been down so long, it's got nowhere to go but up.
BY ANN MACK

Cover: Robert Daly/Stone

billion broadcast upfront—and the fact that advertisers have reneged on only about 2 percent of their upfront commitments—is great news for the networks, always a bellwether for the industry.

Veronis Suhler Stevenson predicts total U.S. ad spending will grow 3.8 percent by the end of 2003, to $177.6 billion, and will have a compound annual growth rate of 6.3 percent through 2007, to $231.9 billion. Two of the hardest-hit segments of the media marketplace—online and business-to-business print advertising—seem poised for improvement. Internet advertising rose 7 percent in the first quarter of this year, to $1.69 billion. And for the first time since November 2000, business-to-business ad pages are beginning to show some hope: Pages improved 0.9 percent in June and revenue was up 4.9 percent.

In more bullish economic times, Wolf says, a rising tide tends to lift all boats. When the economy turns south, however, advertisers, often locked in one death match or another for market share, become more intent on squeezing the most out of their advertising dollars. That, Wolf says, leads to a heightened level of horse-trading for the best deals. And that sort of quid pro quo is more likely to occur at a media company with lots of components.

"Our specific advantage has to do with the variety of media assets we can pull together in a very nimble way. When times are tighter, it becomes a question of whether you can execute that." – STEPHEN LACY, MEREDITH

"Big, national advertisers like these conglomerates because they are always looking to trade up—for better media properties, for better pricing, for better avails. In boom times, to some extent, almost every media company will prosper. In a more challenging economy, size and scale can be a major advantage with these advertisers."

Rich Hamilton, CEO of Zenith Media, agrees with Wolf, up to a point. He says he clearly sees the benefit potential of a media colossus, from the standpoints of ad sales and financial resources. But those advantages, he says, are there in good *and* bad times. And there isn't anything inherently good about being massive when the economy drags.

Just ask the head of any small to midsized media company; they'll tell you they have the advantage of being able to turn on a dime when fortunes change.

"When you lump things together, you aren't going to necessarily have an advantage," says Jeff Smulyan, president and CEO of Indianapolis-based Emmis Communications.

Emmis is a diversified media company with holdings in TV, radio and magazines. It's a powerful media firm, but it does not, nor does it pretend to, play in the same arena as the media giants. And that's fine with Smulyan.

"What it really boils down to is the quality of your operation," he says. "I wouldn't want to denigrate any of those larger companies, because they have fine operations too, but the ability to move more quickly is an advantage to us in some situations. Most advertisers are looking at very specific objectives, and what they really need is a very targeted approach. We can give them that, and we can make it happen quickly for them."

The ability to pull together a top-flight advertising deal quickly also works well for Des Moines, Iowa–based Meredith Corp. The publishing/broadcasting company might not be among the largest media players in the land, but it's no pushover.

"What we hear sometimes from our clients is that other, larger companies can't get all their constituent parts to play together," says Stephen Lacy, president of Meredith's publishing group. "We haven't burdened ourselves with major silos, and we can move back and forth between platforms—whether that's consumer magazines or custom publishing or TV stations or Web sites. Our specific advantage has to do with the variety of media assets we can pull together in a very nimble way. When times are tighter, it becomes a question of whether you can execute that."

Lisa McCarthy feels just as confident that she can. McCarthy is executive vp of Viacom Plus, the Viacom unit created in 1998 that is able to cut wide-ranging deals for advertisers with blue-chip properties such as broadcast networks CBS and UPN, cable nets MTV and Nickelodeon, TV and radio stations, and outdoor. "What we have is this huge playground, and as long as the client tells us what they need, we can bring everything together for them," she says. "When you look at our entire portfolio, we feel we're better-positioned whether the economy is strong or challenged."

There's no underestimating Viacom's media muscle, but parts of the company have had more problems that others during the downturn. Although CBS is reaping the rewards of a revitalized prime-time lineup, Viacom COO Mel Karmazin publicly lashed out at the company's 185 radio stations for their lackluster performance in the first quarter.

"Our company is so diverse that at any given time we're going to have businesses that are doing really well and some that aren't," explains McCarthy. "One advantage of having a company this size is that the strong parts can help the weak."

Over at Disney-owned ABC, Mike Shaw can offer advertisers a pretty impressive playground, too. Shaw, president of sales and marketing at ABC and the executive who oversees ABC Unlimited, the cross-platform unit of ABC and Disney properties, sees a huge advantage to the resources he can tie together. Shaw's menu of offerings includes the ABC television network, TV stations, cable networks such as ESPN, radio, magazines and even cruise ships. ABC Unlimited, started in 2000, created a sweeping cross-platform Hispanic marketing campaign in early September with Denny's restaurants.

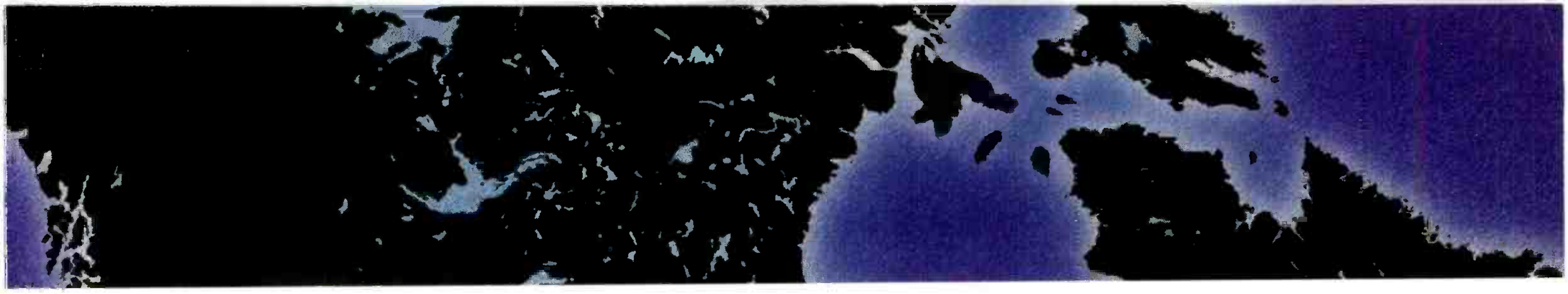
"I think there's been a fundamental shift in the way advertisers view these deals," says Shaw. "Good economy, bad economy, I think there's going to be more of them. You don't get 100 percent of someone's money, but you can get a lot more than if the advertiser is seeing 15 or so media companies."

On occasion, he adds, advertisers looking to make a large, national deal will pit ABC Unlimited against other media giants to see who can come up with the sweetest deals: "Advertisers will tee us up against AOL Time Warner or Viacom. And in those situations, anyone who can't put together a deal on that level will be disadvantaged."

And now, with NBC/Vivendi joining the ranks of the world's largest and well-connected media companies, there will be one more media goliath getting "teed up."

"I would expect that now NBC will really be looking at talking to clients about their entire portfolio," says Viacom's McCarthy. ■

Rich Brunelli is the former editor of Mediaweek Online.



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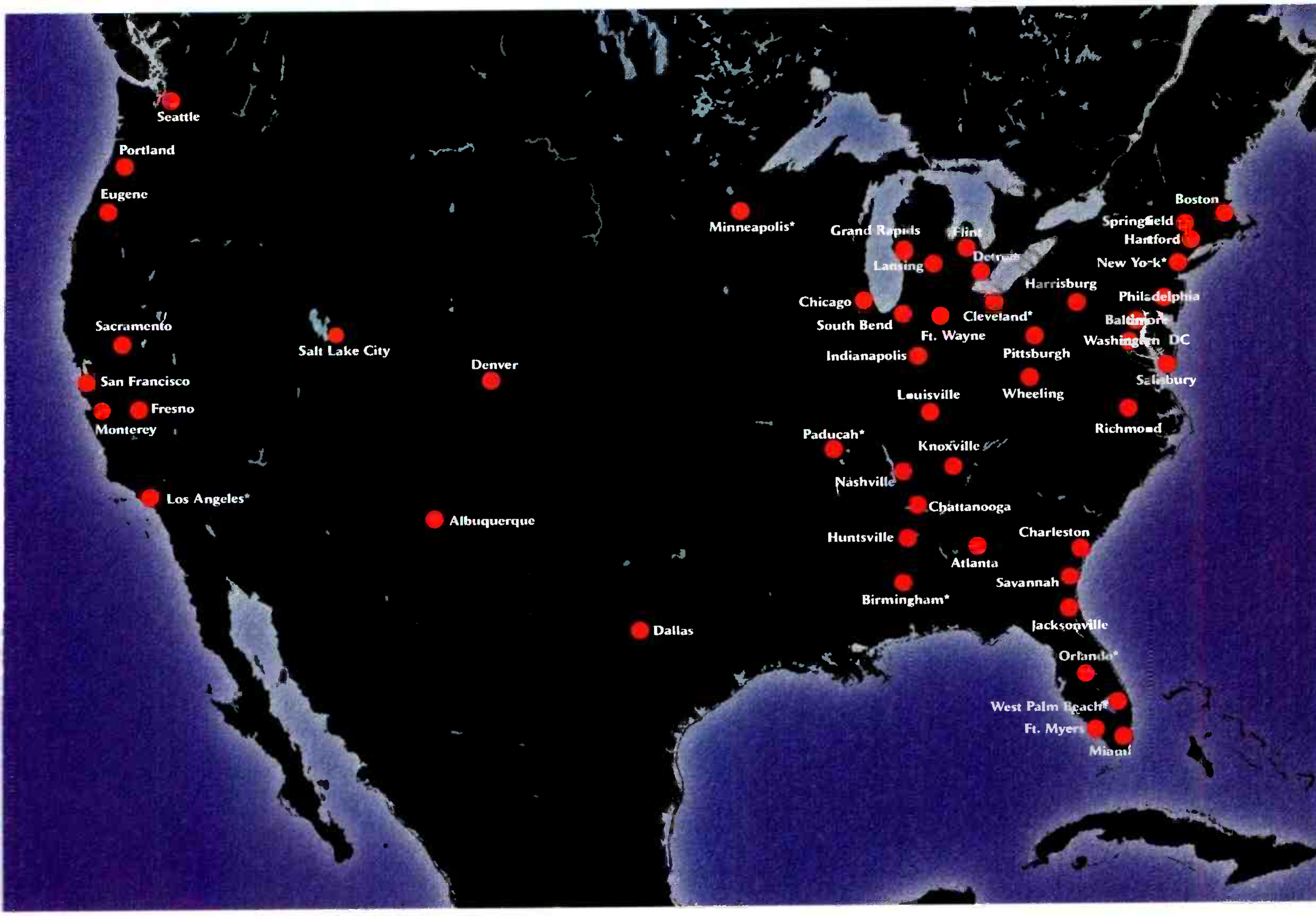

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Strong Showing

Advertisers say network TV is still the best way to meet the masses

BY JOHN CONSOLI

Not only did the six broadcast networks take in a record $9.3 billion in upfront ad dollars for the 2003-2004 season, but financial analysts are predicting that just about all of the networks will improve their profit pictures over the coming year.

Despite hefty increases in pricing for 30- second commercials, advertisers still believe that broadcast television is the most immediate way to reach a mass number of consumers, even if there is some wasted audience outside the demos they are trying to reach.

Advertisers in categories such as fast food, automotive, telecommunications, soft drinks, retail and credit cards are not willing to let their competitors get a leg up on them by allowing them to run a network TV campaign while they sit out.

So the category wars like Coke vs. Pepsi, McDonald's vs. Burger King and Wendy's, Target vs. Wal-Mart, AT&T vs. Verizon and Cingular, Visa vs. American Express and MasterCard, and all the U.S. automakers vs. the foreign manufacturers, are filling the networks' coffers with ad dollars, often at the expense of other media.

"Mass audiences are a scarce commodity," says Lee Westerfield, managing director of the media sector of Jefferies & Co. "Companies in these categories need to continually market their brands across the country, and the broadcast networks are the only place that can provide them with the levels of geographic scale and demographic scale they are looking for."

Westerfield contends that the upcoming broadcast television season will yield better cash flow for the networks not only because they have more advertising dollars coming in but also because with the influx of reality programming, they will be able in the short term to cut down on the more hefty production costs of scripted shows.

"Programming costs are not rising as fast as the revenues the networks are taking in," Westerfield says.

Westerfield adds that the growing use of product integration in programming and the increase in the number of ad spots per commercial pod will also contribute to more dollars to the networks' revenue picture.

SPENDING: NETWORK TV

PAST		
1998		$16.3
1999		$18.0
2000		$20.3
2001		$18.6
2002		$20.0
PRESENT		
Jan.-June 2003		$10.4
FUTURE		
2004	Veronis	+8.2%
	Zenith	+7.0%
	PwC	+12.4%

All dollar values in billions.
Source: TNS Media Intelligence/CMR

"This will be broadcast television's best year for revenue increases and increased cash flow in a long time," Westerfield predicts.

Despite the war in Iraq earlier this year, which had a negative impact on broadcast television advertising due to program preemptions, and without the massive amount of Olympic advertising revenue from the previous year, media investment firm Veronis Suhler Stevenson is projecting that broadcast television ad revenue will still rise by 3.6 percent to $16.9 billion this year. And with the summer Olympics back next year, plus the strong upfront, Veronis is projecting a 10 percent increase in advertising revenue for 2004 to $18.5 billion.

And Veronis, like most industry observers, points out that the broadcast television industry's advertising revenue growth is occurring, amazingly, as ratings and viewership continue to decline. "Spending on broadcast television advertising increased in 2002 despite the continuing erosion of audience base," the Veronis annual *Communications Industry Forecast & Report* says. "A lack of enough new breakout hits, diminishing interest in reality television, and increasing competition from cable channels all contributed to the decline in network TV viewership."

LET THE GAMES BEGIN: NBC's coverage of the 2004 Summer Olympics in Athens will pump up the network's ad coffers.

While the cable TV industry has tried to promote the fact that the six broadcast networks continue to lose their cumulative share of audience to cable, media buyers still point out that the lowest-rated broadcast networks—UPN and the WB—still bring in larger audiences each night than the biggest individual commercially supported cable networks. And Veronis research numbers point out that "although viewers have a growing array of programming choices available to them, more channels do not necessarily lead to increased viewing."

Veronis notes that in households that receive in excess of 120 channels, on average, only 17.9 of them are watched. In most instances, the six broadcast networks are more frequently among them.

With the broadcast networks expected to convert 98 percent of the $2.6 billion in ad dollars promised by advertisers in the upfront for fourth quarter of this year [which is the first quarter of the new fall television season] into actual orders, the stage is being set for another strong year.

"There is no indication that 2004 will not be another big year for the broadcast networks," says David Poltrack, executive vp of research for CBS.

"It looks like double-digit increases for the fourth quarter, and things will only get better with the Olympics and the quadrennial elections in 2004. The broadcast TV audiences were as stable as they have been in a long time this past season, and advertiser demand has been at an all-time high. On top of that, the stock market appears to be bouncing back slightly. We have no worries right now." ■

John Consoli writes about network television for Mediaweek.

contrary to what banks are saying,
the interest rate on homes is
higher than ever.

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HGTV's lineup of lifestyle programming has struck a chord with viewers, setting records for primetime household delivery and total day household delivery. In fact, we've experienced seven straight months of double-digit percentage increases in primetime and total day.* HGTV also attracts a highly sought after upscale audience. With that kind of momentum, it seems there's nothing quite like the thrill of everyday life.

SCRIPPS NETWORKS

YOU SHOULD SEE WHAT'S ON HGTV!

HGTV.com

*(% increases compared to same month a year ago, average HH impressions in primetime: M–Su 8p–11p and in total day: M–Su 6:30a–3a). Source: Nielsen Media Research. January–July 2002, 2003. Subject to qualifications upon request.

High Interest

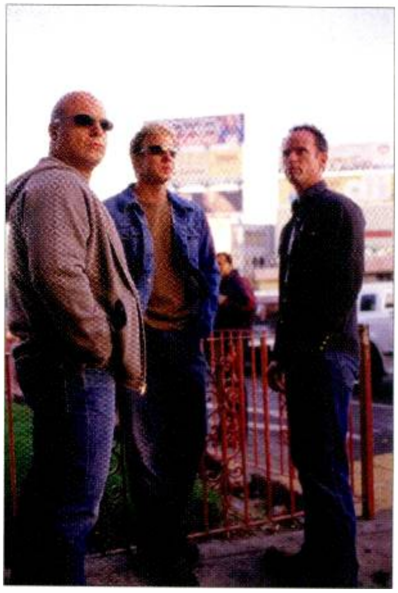
The demand for news and success with original series draws new ads

BY MEGAN LARSON

Following five years of dizzying highs and precipitous lows, the cable industry is expected to settle in for some steady, even growth next year and beyond. According to Veronis Suhler Stevenson's annual forecasting report, overall spending, including advertising and license fees on satellite and cable, is projected to grow at a compound rate of 7.5 percent for the five-year period that began in 2002—down from the 10.8 percent annual compound growth rate in 1997-2002, to reach $110.8 billion in 2007.

Spurred on by more original programming and increased interest in news, ad-supported cable networks' prime-time share of audience during the 2002-03 TV season grew 3.6 percent to reach 49.3, according to the Cabletelevision Advertising Bureau. After making inroads against broadcast this year by beating the seven networks in share of viewers in May and during the summer, cable is expected to win the season within two years. "Cable could pass broadcast during half of the season next year, if not the whole season," says Tim Brooks, Lifetime's evp of research.

"With global security issues, economic issues, education issues, a war and an upcoming election, this has been one of the most dynamic news periods in recent years," adds Greg D'Alba, evp/chief operating officer of ad sales at CNN. "News viewing has become so mainstream."



GOING AFTER THE NETWORKS: With successful original programming like FX's *The Shield*, cable has been making inroads against broadcast TV.

Prashant Gupta

SPENDING: CABLE TV

PAST		
1998		$6.7
1999		$8.9
2000		$10.2
2001		$10.3
2002		$10.9
PRESENT		
Jan.-June 2003		$5.9
FUTURE		
2004	Veronis	+7.5%
	Zenith	+8.0%
	PwC	+7.9%

All dollar values in billions.
Source: TNS Media Intelligence/CMR

Few of cable's original scripted programs, aside from HBO's *The Sopranos*, have made a significant ratings impact on their own, but the combination of all these efforts, including USA's *Monk* and *Peacemakers*; FX's *The Shield* and *Nip/Tuck*; TLC's *Trading Spaces*; and Bravo's *Queer Eye for the Straight Guy* has helped boost cable as a whole. Cable networks, including premium channels, are expected to spend $7.6 billion in programming this year compared with $7.1 billion in 2002. As the investment continues, total audience share netted by ad-supported and premium cable channels is projected to hit 66 percent by the 2006-07 season, according to Veronis.

Though it is difficult to predict exactly how the marketplace will swing, a healthy flow of network and local ad dollars is expected to follow programming improvements. According to Veronis, network advertising will grow 8 percent next year to reach $12.4 billion. By 2007, network cable will hit $16.6 billion. "The economy is always a big question, but it looks like 2004 will be a good media year," says Neil Baker, svp of ad sales at E! Entertainment Networks. "Advertisers sound confident; I just returned from Detroit where automakers said they were looking to strengthen market share."

Extra money coming in coupled with sold-out broadcast inventory could make for a tight 2004. "We are looking at a healthier economy," says Fred Dubin, managing partner at Mediaedge:cia. "If people open their pocketbooks, we could be looking at an ugly second-quarter marketplace next year."

Due in part to election spending next year, most of which goes to TV stations, local cable is expected to post strong gains. The Veronis report projects an 8.5 percent increase in local ad dollars that will take the total windfall to about $3.9 billion next year. Lee Westerfield, managing director at Jeffries & Co., is more bullish and puts local cable's take at about $4.4 billion next year. For the five-year period beginning in 2002, local cable is expected to grow at an annual compound rate of 12.2 percent to reach $5.9 billion in 2007, according to Veronis.

Additionally, due to the expansive rollout of interconnected cable systems (there will be 75 by year's end) through the rep firm National Cable Communications, national spot cable also is expected to grow. According to Westerfield, national spot will post about $550 million in gross billings this year, which could reach almost $700 million next year.

On the operator side, cable subscriber growth has flattened and is expected to hover at around 71 million next year. Satellite is expected to make modest gains at about 11 percent to reach 23.9 million subscribers in 2004, according to Veronis. With the firm grip cable has on U.S. households, satellite will only be able to make minor advancements against it. "There is saturation on both sides," says Bruce Leichtman, president of the Leichtman Research Group. "Eighty percent of television households have one or the other. The rest don't subscribe to either for a reason."

Cable will continue to deflect satellite's encroachment by packaging high-speed Internet with video subscriptions, digital cable boxes and video-on-demand. Citing the Federal Communications Commission, Veronis reported that cable operators are investing approximately $17.8 billion in system upgrades this year. "Cable is doing very well with cable modems, reaching 15 percent of all households where it is available," says Leichtman. "VOD is close to passing 50 percent of homes, but there is still a lot of work to be done to grow awareness of the product."

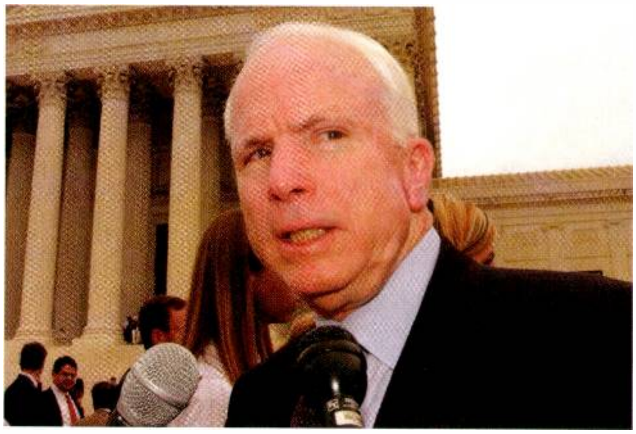
News Corp. is expected to give DirecTV a little shine after it finalizes its purchase of the satellite operator from General Motors, but because of bandwidth constraints, satellite won't likely match cable's delivery of VOD and other bells and whistles. ■

Megan Larson writes about cable TV for Mediaweek.

Gaining Steam

Political campaigns and the Olympics should spur growth in spot TV

BY SANDY BROWN



WATCHING WALLETS: The bill limiting campaign contributions, sponsored by Sens. McCain (above) and Feingold could put a damper on political ad spending in 2004.

Stefan Zaklin/REUTERS

Between political races and the summer Olympics, 2004 is shaping up to be a banner year for spot TV. The small growth experienced this year—the Television Bureau of Advertising expects to hit the lower end of its spot forecast for 2003 at 1 percent growth—will be replaced by double-digit gains in 2004, according to the group, which represents broadcasting firms, advertising-sales-rep firms and some 500 individual TV stations nationwide.

The prognostications at the TVB for 2004, based on the consensus of Wall Street and financial analysts, rep firms and independent research, is that total spot growth for 2004 will fall in the neighborhood of 10 percent to 11 percent. The TVB predicts that national spot growth will be strongest at between 14 percent and 15 percent next year; local spot growth will rise a healthy, yet more modest, 7 percent to 8 percent.

David Wyss, chief economist at Standard & Poor's, says that while economists still have general concerns about terrorism, war in the Middle East and high oil prices, the recession is over. Wyss says the recession during the past two years in the U.S. was mild, and as such we can look forward to a recovery. However, he says, "It's not going to be exciting."

Indeed, while the overall projections look good, there are a few factors that might well undermine the hope that 2004 will be a blockbuster year for spot growth.

The strength of the automotive sector remains crucial to the spot market. After two years of unrelenting 0 percent financing offers, questions about whether dealers will be able to sustain that model are emerging. American manufacturers, faced with increased competition from foreign automakers, have little choice but to participate in the spot market or face attrition from foreign car companies such as Toyota and Honda.

As Bear Stearns senior managing director Victor Miller puts it: "Just as McDonald's has come back, just as Procter & Gamble came back, so has automotive. Marketing pays off."

Yet auto dealers are becoming more creative in the ways they spend those marketing dollars, and it could hurt both local and national spot. Alan Starling, chairman of the National Automobile Dealers Association, acknowledged that more dealers are turning to the Internet to lure customers to dealerships.

NADA analysis points to the percentage of its members' advertising devoted to TV dropping from 16.6 percent in 1998 to 14.5 percent in 2002. Moreover, miscellaneous ad spending on direct mail, displays, demos and, of course, the Internet is up 13 percent from 2001 to 2002.

Starling says the challenge for TV is to show dealers the added value the medium provides, since "the competition is working hard to cut into TV's piece of the pie. TV offers the most personal contact to consumers, but there has been a 15 percent decline." Starling also points out that cable is offering a more attractive cost alternative for dealers.

Sue Johenning, evp, director of local broadcast at Initiative Media, says the TVB forecast is "in the ballpark" and the entertainment, fast-food and retail categories will perform well next year. Still, while Johenning expresses optimism regarding those sectors and the healthy trickle-down effect of a solid upfront this year, she says automotive spending will be down or flat in 2004. "While the automotive sector will be down, that doesn't diminish its importance to local and national spot buying," she says. "To whatever degree a dropoff in spot sales occurs in the automotive category, it will be easily offset by political dollars."

Those political dollars, however, will not necessarily be the slam dunk they were in 2002, when expectations were beaten and political spending went through the roof at $1.1 billion. Political dollars threatened by limitations to campaign contributions and the soft-money bill that has been set forth by Sens. John McCain and Russ Feingold could pull a hefty chunk of TV-spot spending out of the equation in 2004.

The bill limiting soft-money contributions could eliminate up to $500 million in political spending out of the spot market if the Supreme Court rules in favor of its constitutionality, according to Jan Baran, senior partner at Wiley Rein & Fielding. For the moment, the McCain-Feingold campaign-finance reform act is law, but, says TVB president Chris Rohrs, "political is the wildcard variable in spot." He says that "by hook or by crook," politicians will spend the dollars at 2002 levels. He also says the TVB has factored the uncertainty regarding political dollars into its forecast for 2004.

Overall, there is much reason to be optimistic about spot growth next year. According to Rohrs, TV represents a safe harbor for advertisers. That, he says, combined with continued strength in the auto, political, retail and movie/DVD sectors, a strong upfront and spillover to spot, increases in multicultural marketing, and strong media performance overall, make 2004 look brighter all the time. ■

Sandy Brown is a former reporter for Mediaweek *and deputy online news editor for* Adweek.

SPENDING: SPOT TV

PAST		
1998		$15.5
1999		$15.4
2000		$17.4
2001		$14.1
2002		$16.2
PRESENT		
Jan.-June 2003		$7.1
FUTURE		
2004	Veronis	+7.1%
	Zenith	+6.0%
	PwC	+10.5%

All dollar values in billions.
Source: TNS Media Intelligence/CMR

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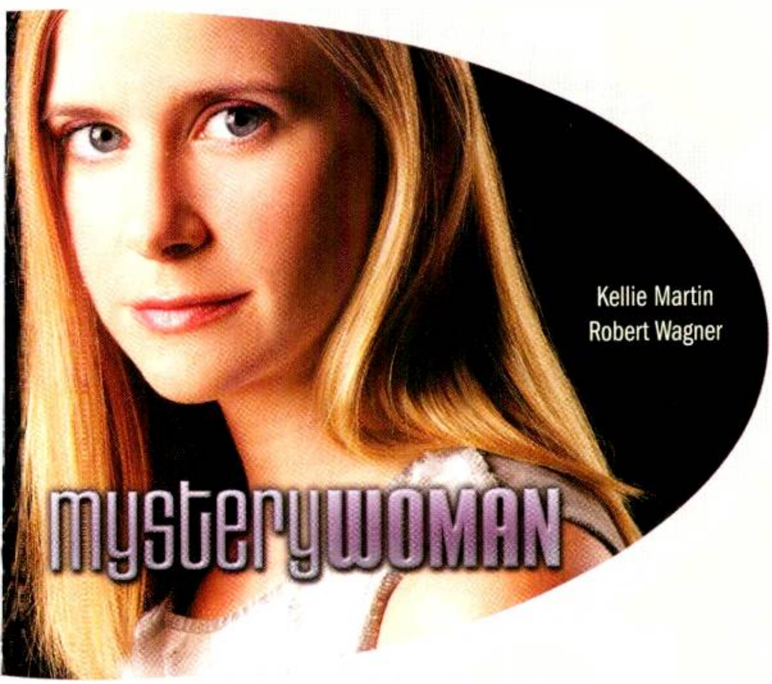


Dana Delany
Doris Roberts
Megan Gallagher

Hallmark CHANNEL

Where great ***stories*** come to life

*Source: Nielsen Media Research, 12/30/02-8/31/03; Coverage area ratings; Ad-supported Cable Original Movies premieres (excludes mini-series). Subject to qualifications made available upon request.

hallmarkchannel.com

Durable Goods

First-run hits, off-net sitcoms create uptick in ad spending BY MARC BERMAN

TALKING THE TALK: *The Ellen DeGeneres Show* is off to a promising start, drawing more viewers than its lead-in show.

On the heels of another rapidly paced and unexpectedly strong broadcast network upfront, syndication sales executives were obviously ready, willing and able to do business. Fueled by what analysts refer to as tempered optimism in the economy, advertiser spending in syndication remained on the upside for the second consecutive year. Estimated ad dollars in syndication this year fall in the mid-$2 billion range, and consensus points to more growth for at least the next few years.

"Last year, we saw an uptick in the advertising marketplace once the recession ended," says Leo Kivijarv, director of research and publications at Veronis Suhler Stevenson, who estimates growth through 2007-08 of another 3 percent annually. "One year later and broadcasting spending—syndication included—remains on the rise because of the basic underlying growth in the economy."

"Syndication is not just riding on the coattails of the broadcasters," says Kevin K. Carton, global leader, entertainment and media practices at PricewaterhouseCoopers. "The value of long-running first-run shows like *Wheel of Fortune*, ... *Oprah* and *Entertainment Tonight*, and A-list off-network sitcoms like *Friends*, *Seinfeld* and *Everybody Loves Raymond* are immeasurable." PwC estimates compounded growth of 4.9 percent in broadcasting overall per year through 2007.

"My only concern about syndication is that too much reality in prime time means there could be less eventual, successful off-network product," warns Carton. "Other than *Cops*, reality does not repeat well."

With durability in syndication a key selling point, 11 current first-run strips past the 10-year mark is a positive worth noting. Veteran *Wheel of Fortune*, in fact, just taped its 4,000th episode.

"Syndication really is a breeding ground for long-term hits," says Rick Feldman, the recently appointed president and CEO of the National Association of Television Programming Executives. "Viewers seem to be more committed to staying with shows in daytime than they do in prime time."

"You really know exactly who your audience composition is in syndication," adds Dick Askin, president and CEO of Tribune Entertainment. "And the ability to find a new hit in the magnitude of King World's *Dr. Phil* this year is an obvious incentive."

Although there will be no new hits of that magnitude this year, new Warner Bros. talker *The Ellen DeGeneres Show* is off to a promising start. According to Nielsen Media Research and based on the overnight markets for the week of Sept. 8, *Ellen* in week one is up 5 percent in the ratings from its lead-in and 17 percent from the year-ago time period average. Early buzz, meanwhile, points to *Entertainment Tonight* spin-off *The Insider* as a show to keep an eye on in 2004.

"Unlike the networks, which often cancel new shows in a matter of weeks, syndicators overall are generally more patient," says John Rash, svp, director of broadcast negotiations at Campbell Mithun. "That in itself sends an important message to the advertising community."

The Syndicated Network Television Association, which held a gathering last February in New York targeted specifically to buyers and advertisers (and separate from NATPE), points to more original programming than that of the networks as an important added incentive for the advertiser.

"What people don't often realize is the number of hours of original programming you get in syndication," says Hadassa Gerber, director of research at the SNTA. "Although the number of original episodes of a network series is generally about 22 or 24 each season, 39 weeks of original episodes in syndication equals 195 episodes. It would take an average scripted series in prime time years to reach that many episodes."

According to the SNTA, no advertising buy is really complete without syndication, whose audience reach is often competitive with that of the networks. "There have been many times, particularly this summer, that *Friends* in syndication outdelivered *Friends* on NBC," says Gerber. "And sitcoms like *Everybody Loves Raymond* and *Will & Grace* have come particularly close."

Of course, with network spending on the rise, one could say that syndication also is poised for continued momentum.

"With the broadcast networks losing audience every year, advertisers have to spend more to reach the same audience," notes Brad Adgate, svp of Horizon Media. "And the more they spend on the networks, the more they seem to have for syndication and cable. Everyone is benefiting."

Regardless of what the reasons are, all facets of broadcasting—network, cable and syndication—are on the upswing for the second consecutive year, and all three mediums are expected to keep growing indefinitely. "Growth in broadcasting is what you would call a combination of hope and guarded optimism," concludes Carton. "As the economy trickles back, advertiser spending is increasing. It's that simple." ■

Marc Berman writes the Programming Insider *for mediaweek.com.*

SPENDING: SYNDICATION

PAST		
1998		$2.2
1999		$2.3
2000		$2.5
2001		$2.5
2002		$3.0
PRESENT		
Jan.-June 2003		$1.6
FUTURE		
2004	Veronis	+3.0%
	Zenith	+5.0%
	PwC	n/a

All dollar values in billions.
Source: TNS Media Intelligence/CMR

Ron P. Jaffe / Warner Bros.

Toughing it Out

Titles have been challenged to come up with more efficient strategies

BY LISA GRANATSTEIN

The dark clouds hovering over consumer magazines should begin to dissipate as the forecast calls for a brighter 2004, according to Veronis Suhler Stevenson's annual industry projections. For the past two years, slow economic recovery compounded by a downbeat consumer confidence index has made for challenging times. But Veronis says the publishers who have stayed in the fight will be better for it in the long run.

"Magazine publishers are out there trying to strike up new circulation sources and trying to create new programs that are exciting to advertisers," says Andy Buchholtz, VSS managing director. "Everyone is trying to stick to their knitting and make it all happen. When good times are too good, you get distracted and now everyone is getting on the right track."

Overall spending in magazines from 2002 to 2007 will grow at a compounded annual rate of 4.2 percent, to $25.8 billion, according to VSS' Communications Industry Report for 2002-2007. That is an improvement over the 1997-2002 period, which saw magazine spending grow by a meager 1.9 percent. In 2004, total magazine spending will rise 5.8 percent, to $22.7 billion.

By far, the greater challenge for publishers is getting circulation back on track. Consumer magazines continue to rely more on advertising than circulation. Ads in 2004 will comprise 53.7 percent of spending versus 46.3 percent for circ. By 2007, ads will make up 57.4 percent of revenue and circ will account for only 42.6 percent. To combat the overdependency on advertising, some publishers are putting more effort into circ-building. Whereas publishers could once easily pump up circulation from third-party agents such as sweepstakes and telemarketing, those sources can no longer be relied upon. *Reader's Digest* this year announced plans to lower the rate base of its flagship monthly by 9 percent, from 11 million to 10 million in large part because of its decision to eliminate the use of sweepstakes promotions. The move caps a process begun at RDA in 1999 to phase out the unprofitable and controversial stamp sheets, which had triggered lawsuits by several states.

Other titles slashing rate bases include Hachette's *Premiere*, which in February fell 100,000 to 500,0000 (*Premiere* also reduced its frequency to 10 issues per year, and raised the newsstand cover price to $3.99 from $3.50), and teen titles *Seventeen* (Hearst), Time Inc.'s *Teen People* and G+J USA Publishing's *YM*.

Meanwhile, other publishers could be affected in the coming year by the Federal Trade Commission's kibosh on telemarketing if the National Do-Not-Call Registry does go into effect. And on the newsstand, publishers continue to struggle with lackluster sales as a result of the still problematic distribution system.

On the plus side, magazines are relying more heavily on cost-efficient direct-to-publisher efforts, which includes taking a second look at the Internet for pulling in subscriptions. "Online subscriptions are growing steadily and are a productive part of our mix," says Jack Kliger, president/CEO of Hachette Filipacchi Media. Though the Web is still a small portion of HFM's consumer marketing effort, Kliger says he thinks it "holds tremendous potential."

SCALING BACK: Teen titles *Seventeen*, *YM* and *Teen People* have cut rate bases as magazines face new realities in circulation.

Circulation will inch up at a compounded rate of 1.8 percent to $11 billion for the forecasted period, notes Veronis. Total circ spending in 2004 will rise 4.3 percent to $10.5 billion, up slightly from the $10.1 billion projected for this year.

Per-issue unit circulation will be flat in 2004, however, with single-copy sales continuing their downward spiral, off 2.6 percent. And through 2002-2007, newsstand sales compounded annually will be down 2.3 percent and subs will remain largely flat. Broken down, subscription sales in 2004 will continue to account for an even greater amount of total circ. Single-copy sales will account for 13.9 percent, down 0.5 percent from the year before. By 2007, single-copy sales will make up only 13.1 percent of magazines' total circ.

On the ad front, this year's television upfront might bode ill for magazines. "Advertisers felt they had to lock in at upfront prices to protect themselves," notes Lee Doyle, Mediaedge:cia managing partner, director of client services. "If their budgets don't hold up as they get their budget planning, it will come at the expense of other media."

Veronis' Buchholtz, however, is more optimistic. As the economy picks up steam, consumer magazines will see better times. Advertising for consumer magazines will grow at a compounded rate of 6.2 percent to $14.8 billion. For 2003, ad revenue for the industry will grow to $11.3 billion, which is the highest it's been since 2000. Ads in 2004 will continue to rise, up 7.2 percent to $12.2 billion.

"We have a product that consumers want and love, and maybe we have undervalued that," notes Kliger. "There are more parts of the business we can impact in the future, and we're addressing that now as an industry." ■

Lisa Granatstein writes about magazines for Mediaweek.

SPENDING: MAGAZINES

PAST		
1998		$14.8
1999		$16.6
2000		$18.9
2001		$16.4
2002		$16.8
PRESENT		
Jan.-June 2003		$8.6
FUTURE		
2004	Veronis	+7.2%
	Zenith	+4.0%
	PwC	+3.2%

All dollar values in billions.
Source: TNS Media Intelligence/CMR

Pressing ahead

National growing, retail picking up, while classified remains a question BY TODD SHIELDS

A tepid performance for newspaper advertising in 2003 leaves analysts cautiously optimistic that 2004 will be better. But, they warn, it all depends on whether the economy picks up steam as expected. Total ad spending in newspapers for the first six months of 2003 rose 1.7 percent compared with the same period a year ago, according to the Newspaper Association of America, a trade group. Industry experts say that uptick could signal a strengthening trend that will continue through 2004, following a dismal ad slump that began in 2001.

"We're seeing some signs of renewed vigor," says Robert Broadwater, managing director for merchant bankers Veronis Suhler Stevenson. "But nobody's popping champagne corks yet."

The Newspaper Association of America is predicting 5.3 percent growth in ad spending in newspapers in 2004, following expected growth of 2.9 percent for this year (and following consecutive years of decline in 2001 and 2002).

Others forecast less vigorous growth. PricewaterhouseCoopers predicts revenue growth from ads at 2.5 percent for newspapers in 2004. Veronis Suhler expects combined ad and circulation revenue growth of around 4.4 percent for daily newspapers.

Experts say the course of the economy so far this year dictates caution. Newspapers enjoyed a fairly robust fourth quarter in 2002, then watched in dismay as ad volume went flat through the first half of this year—a development attributed to economic uncertainty surrounding the war in Iraq. Some advertisers are loath to push products with a war under way, and many businesses postpone spending decisions as conflict looms. In addition, sales were weak at department stores, which are key newspaper advertisers, says Jim Conaghan, NAA's vp of business analysis and research.

Now, with the economy picking up, Conaghan is hopeful of a rebound for newspaper advertising. National advertising should pick up more quickly than retail, and within retail preprinted inserts should continue to grow more quickly than run-of-paper ads, Conaghan predicts. Over the past few years, notes Conaghan in the NAA publication *Presstime*, traditional retail categories like general merchandise and food have grown much less rapidly than categories such as home supplies and furniture stores, local financial advertisers, and computers and electronics stores. "That trend is likely to continue next year."

National advertising in newspapers should grow at 6 percent in 2004, says Stefanie Kane, a partner in the media and entertainment division of PricewaterhouseCoopers. Retail is predicted to grow 3.4 percent, better than the 2003 pace of 2.5 percent but still trailing national, Kane says.

Despite such trends, retail remains the leader of the three major newspaper ad categories, comprising 47 percent of projected 2004 ad spending, according to NAA figures. Classified, though wounded by the slow economy and Internet competition, still accounts for 36 percent of newspaper ad spending. The remaining 17 percent is made up of national advertising.

HEARD IT IN THE WANT ADS: Some say competition from the Internet will continue to hurt newspaper classified advertising going into 2004.

The NAA predicts 6.6 percent growth for classified in 2004. Even with such a brisk performance, it still would trail its level of four years earlier. The decline is attributed partly to a weak economy, which saps help-wanted ads, and partly to competition from the Internet. In 2000, help-wanted made up 18 percent of all newspaper advertising; two years later it made up but 10 percent.

Analysts have differing views on whether that decline will continue. Kane says newspaper classified revenue should drop slightly in 2004, as the category continues to suffer cannibalism from online sites. "That's really the huge push," Kane says. "People are not turning to the paper now for real estate and jobs."

Broadwater, of Veronis Suhler, is less pessimistic. "Coming out of this recession, will help-wanted advertising return to newspapers? That's a real open question. I don't know of a reason it shouldn't," Broadwater says.

Conaghan says that most economists expect growth to accelerate and believe that growth will eventually boost employment—a development that will bring increased classified advertising. "Until you do that, you don't have jobs to advertise," says Conaghan.

Even as they wait for a classified rebound, newspapers are well positioned as advertising vehicles in an increasingly fractured media landscape, says Broadwater. With hundreds of channels on TV and dozens of commercial radio stations vying for consumers' attention, newspapers often are the sole broadly viewed media in a local market.

"Where's a place you can go and get mass?" asks Broadwater. "Newspapers are one of the few places you can go and get that." Still, he says, newspaper advertising is tied to larger trends. "If the economy does well, the newspaper industry should do well," Broadwater says.

Todd Shields is the Washington, D.C., bureau chief for Mediaweek.

SPENDING: NEWSPAPERS

PAST		
1998		$43.9
1999		$46.3
2000		$48.7
2001		$44.2
2002		$44.1
PRESENT		
Jan.-June 2003		$11.2
FUTURE		
2004	Veronis	+4.8%
	Zenith	+3.0%
	PwC	+2.5%

All dollar values in billions.
Source: NAA

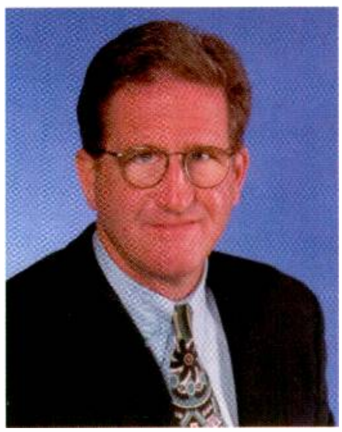
Waiting game

In uncertain times, advertisers are placing buys close to air time

BY KATY BACHMAN

Blame the shaky economy, the war in Iraq, even the bad PR surrounding media consolidation. Whatever the culprit, for the second year in a row, the radio business is hoping for better times next year. Although the year started off well enough in January, a traditionally soft month for radio, things began to unwind pretty fast, and what was expected to be a rebounding radio ad market turned into a painfully slow recovering one. That took a lot of folks by surprise for a medium that generally leads media out of a recovery, not follows it. By mid-year, many pundits, as well as the Radio Advertising Bureau, revised downward their projections for the year.

At the halfway point in 2003, radio was up only 2 percent. Various forecasts predict the business will pick up in the second half of the year to eke out between a 3 percent and 5 percent increase. Through July, revenue from radio advertising had inched up one percentage point to 3 percent, according to the RAB. For the year, Veronis Suhler Stevenson is forecasting 5.4 percent growth to $20.4 billion.



GAINING CONFIDENCE: ClearChannel CEO John Hogan says he is expecting radio to finish strong in 2003, "and that should carry over into 2004."

"It's been a steady, but slow recovery period, more pronounced on the East Coast than the West Coast," says Gary Fries, president of the RAB. For 2004, RAB's Fries is forecasting a 4 percent to 5 percent increase. Veronis Suhler Stevenson predicts 8.6 percent growth to $22.2 billion, while Price WaterhouseCoopers predicts 7.2 percent growth to $21.6 billion.

All year, the operative phrase to describe the radio business has been "lack of visibility." Because advertisers can get on the air practically at a moment's notice, they played a wait-and-see game, holding onto budgets until they were sure, and placing buys close to air dates.

Despite uncertainty dominating advertising demand, radio continues to attract advertisers representing a broad base of categories. Automotive, about 15 percent to 20 percent of all radio advertising, has been a constant all year. In markets like Los Angeles, automotive has been up nearly 20 percent. "It was a slightly bigger share of revenue this year. The automakers don't feel they can lose share, so that will continue," says Rick Cummings, president of radio for Emmis Communications.

Advertising from entertainment companies, particularly TV and cable, has also stepped up its investment in radio. "The tune-in category has grown to be the third or fourth largest category for network radio, and next year it'll probably be No. 1," says Peter Kosann, president of sales for Westwood One.

Though Olympics and political races don't traditionally spend in radio, the increased demand on TV in 2004 will spill over. "Radio tends to have a good year [during Olympic and political years] because the dance cards of the other broadcast entities are full," says Stu Olds, president of Katz Media.

Broadcasters are already seeing some signs of relief. "There is a little more certainty, confidence and action," says John Hogan, CEO of Clear Channel radio. "Our pacings for fourth quarter are healthier than third quarter. The expectation is we'll finish the year on a stronger note and that should carry over into 2004." But others aren't so sure that radio will post growth in the 7 percent to 8 percent range. "That seems high right now," says Anne Elkins, senior vp and director of local broadcast for Mediacom. "Where are the dollars going to come from? I don't see business coming back unless the health of the job market improves. Companies will make their first investment in employment, not advertising."

Local advertising, about 80 percent of the business, tended to be resilient during past downturns, but in 2002 and 2003 and leading into 2004, it has been national advertising that has posted healthy increases.

Consolidation, along with a new Arbitron national database that allows groups to compile ratings across customized geographies, has played a big part in pushing national deals to the forefront of the business. It has also given the top groups, such as Clear Channel and Viacom's Infinity Broadcasting, the mass to compete on a national level with other media. Up 8 percent through July, Olds forecasts national to be up by 10 percent or more in 2003. "Customizing markets and creating mini-networks to fit a retailer's footprint is a benefit from consolidation; it creates higher value," says Sue Johenning, executive vp and director of local broadcast for Initiative Media.

Anticipating the recovery as 2004 nears, agencies are urging their clients to begin placing ad campaigns further out in advance of the air date. "We've been telling our advertisers that if they gave us the money a month earlier, they'd get better rates. But so far, they haven't needed to," says Matthew Warnecke, vp/manager of local and network radio for Mediacom.

"Because of the way radio has positioned itself, it's the last thing planned," says Rich Russo, director of broadcast services for JL Media. "And if the cost is similar to TV, clients go to TV. TV knows it's splintered, so it lowers its cost, and radio has done nothing to combat it. Nobody is selling the value of the medium. Radio is poorly marketed."

"The industry has to put on a better face if radio is to get more than 8 percent of advertising budgets," says Joel Hollander, COO of Infinity Broadcasting. "The RAB has to do a lot better job to work with the industry." ■

Katy Bachman writes about radio for Mediaweek.

SPENDING: RADIO

PAST		
1998		$15.4
1999		$17.7
2000		$19.8
2001		$18.4
2002		$19.6
PRESENT		
Jan.-June 2003		n/a
FUTURE		
2004	Veronis	+8.6%
	Zenith	+4.2%
	PwC	+7.2%

All dollar values in billions.
Source: Radio Advertising Bureau.

Branching out

Trade magazines offer clients a variety of venues in which to advertise BY AIMEE DEEKEN

When last June's figures for ad revenue and pages were announced, the prevailing wisdom in the business-to-business industry was that the worst was over. Ad pages in the month of June increased 0.9 percent over the corresponding month for the first time since November 2000. Revenue was up 5 percent, according to the Business Information Network, part of American Business Media. Retail, automotive, home and building, and drugs and toiletries experienced significant growth. However, telecom and technology (the computer and software categories) were down 30 and 20 percent, respectively.

Still, these figures were well ahead of year-end tallies for 2002, when the only category out of 12 with a positive ad revenue increase over 2001 was drugs and toiletries. Heavy decreases were seen in finance, telecom and tech sectors, the biggest B-to-B categories. Though total 2002 B-to-B spending declined for the second year, by 8.7 percent to $19.2 billion, 2001 spending was only half that, at $10.8 billion, reports Veronis Suhler.

Circulation also declined for the second consecutive year, falling 2.6 percent to $2.1 billion in 2002, reports Veronis Suhler. This led to more reliance on controlled circ, which accounted for nearly two-thirds of overall B-to-B circ last year, its share of total circulation having increased the last two years. Heading into 2004, the industry is expected to finish the year up 3 percent in ad spending.

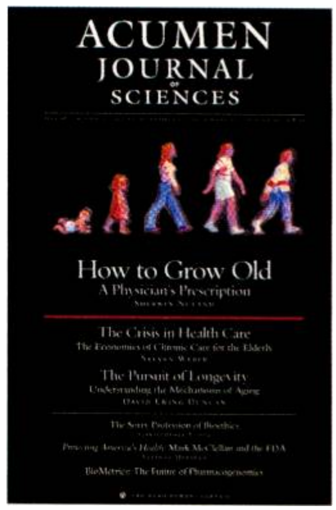
PriceWaterhouseCoopers forecasts next year's spending at $7.7 billion with a growth of 3.5 percent. Veronis Suhler projects a slow, steady compound annual growth of 4.8 percent in the industry through 2007, and expenditures of $24.2 billion by 2007.

The source of such growth can be summed up in the catch-phrases "value-added" and "integrated marketing" packages. "There has been a leveling out of ad pages," says Dan Belmont, president of Carat Media's business and technology group. "Money went from ad pages to other lead-generation programs." Belmont, cites the Internet, direct mail and data analytics as examples.

Gordon Hughes, president/CEO of American Business Media, agrees. "The topline has to come through new products," he says. He offers as examples custom publishing, sponsorships, print and digital ad packages, manipulating databases for narrowed demos and rich data, or exclusive market intelligence information.

Technology advertising, the largest category, is expected to pick up in second quarter 2004. "Most companies made computer investments in 1999 for Y2K, and now it's time to invest in new machines," explains Hughes. "Many companies will go to Ziff and IDG books [for that information]."

In the healthcare sector, "Pharmaceutical spending in [mass-circ] medical journals has had a weak year," says Steve Stoneburn, president/CEO of healthcare publisher Quadrant Media Corp. But with the introduction of new drugs next year, he says, pharmaceutical companies will have to create innovative marketing campaigns in B-to-B journals to compete for doctors. Smaller, specialty medical journals have fared better, and biotechnology and biodefense are growing categories. The *Acumen Journal of Sciences* launched in May as a bimonthly covering these burgeoning fields.



SPECIALIZED: Biotechnology and biodefense are growing categories in the B-to-B sector; *The Acumen Journal of Sciences* launched last May.

Other revenue streams are tech-driven, such as sponsored events broadcast by satellite to the Web (and requiring paid access) and combination online/print packages. Healthcare publishers are also going into the medical education industry, offering newsletters, symposia and Web-based information traditionally offered by other companies.

The trade show category is an important revenue generator for B-to-B titles. Last year, trade shows was flat once the computer and finance sectors were extrapolated. Healthcare, home and building, and auto either grew or felt much smaller declines. Trade show and exhibition spending is projected to grow alongside the rest of the B-to-B industry next year.

A new model appears to be emerging for trade shows in light of the nation's decreased travel—multiple shows in several major markets instead of one big show. However, many of these on-the-road shows are developed by single companies, thereby taking money from industry-wide events. "It's been a very crowded marketplace the last couple years," says Belmont. "More companies are doing their own events and competing with the industry event in the marketplace," explains Belmont, who buys in multiple technology and business trade books.

Industry executives anticipate mergers and acquisitions activity to grow next year. As exemplified Aug. 25 when Advanstar Communications acquired health-industry magazines from Thomson Healthcare for $135 million in cash, big companies will continue to acquire mid-size companies. Then, as they trim off single properties, smaller companies will buy those entities and become mid-size.

The recent advertising data and revenue-building trends in full swing finally signal an industry-wide recovery in 2004. "B-to-B felt [the recession] starting in September 2000, before other economic sectors. It's been a rough three years for us," notes Hughes. "But with all the cuts that have been made, this industry will be more profitable than ever once we bounce back." ■

Aimee Deeken is an assistant editor at Mediaweek.

SPENDING: TRADE MEDIA

PAST		
1998		$9.0
1999		$9.0
2000		$10.0
2001		$8.4
2002		$7.2
PRESENT		
Jan.-June 2003		4.3
FUTURE		
2004	Veronis	+3.8%
	Zenith	n/a
	PwC	+3.5%

All dollar values in billions. Source: Busines Information Network (BIN) data as reported by TNSMI/CMR to the American Business Media.

Outside Help

New technologies are creating targeted opportunities for out-of-home BY KATY BACHMAN

The outdoor business used to mean primarily static billboards and posters. While those still make up 60 percent of the business, outdoor is rapidly incorporating new, electronic technologies that give the outdoor business a greater degree of flexibility and targetability. "*Minority Report* isn't that far off," says Stephen Freitas, chief marketing officer of the Outdoor Advertising Association of America. "Outdoor has been thought of as a mass medium, but because of these new technologies, it's becoming a targeting medium. That's where we're headed: targeting the individual consumer."

New technologies, along with the imminent arrival of an outdoor ratings service, is causing advertisers to spend more money in the oldest medium. John Miller, managing partner of out-of-home at Mediaedge:cia, says his clients will collectively spend 18 percent more in outdoor this year. "A couple of markets are completely sold out," he says. "If you told me that would be the case a few years ago, I'd laugh."

"Our client base has been expanding by two or three clients every year," adds John Connolly, svp of out-of-home media at MediaCom, which buys for Warner Bros., the liquor company Diageo and pharmaceutical giant GlaxoSmithKline. "Pharmaceuticals is a category that is coming out of nowhere."

After a slow start in the first quarter of this year, the three largest outdoor companies, Viacom, Clear Channel and Lamar Advertising, reported strong revenue growth in the second quarter, with Viacom and Clear Channel posting double-digit growth due to healthier demand from national advertisers. At the half-year point, outdoor was up a healthy 5.3 percent, setting the stage for a solid comeback in the second half of the year that is expected to carry over in 2004.

The OAAA, which originally forecast 4.3 percent growth in 2003, is now forecasting a stronger end to the year. For 2004, the OAAA predicts 5.7 percent growth. Similarly, PricewaterhouseCoopers has forecast even more robust growth of 5.9 percent to $5.95 billion. Veronis Suhler Stevenson is forecasting outdoor will grow 3.9 percent to $5.5 billion, coming off a 2.6 percent increase in 2003.

Although local advertising represents the lion's share of total outdoor revenue—about 60 percent to 75 percent—national advertising has led the recovery. "National can get really big really fast," says Jim Matalone, president of NextMedia Outdoor. "It can make the difference between 3 percentage growth points and 10."

Part of the reason for the comeback in national is consolidation, which has made outdoor much easier to buy. "I can make three phone calls and cover 70 percent of the country," says Miller.

Outdoor advertising has been buoyed by strong demand from the telecommunications business, especially wireless, as it is a natural fit for wireless and cell-phone providers such as Verizon, AT&T, and Nextel. There is also renewed interest from fast food. McDonald's, which continues to be the largest user of outdoor nationally, stepped up its spending in 2003 by buying a poster in every U.S. market to promote salads, dollar menus and griddles. As a result of the spring campaign, the company saw a 12 percent bump in sales.

BABY ON BOARD: New types of out-of-home advertising include baby boards; parents can change a diaper and learn about life insurance at the same time.

Another fast-food advertiser, Red Lobster, increased its outdoor investment. "They're looking to get more bang for the buck," says Howard Greiner, president of Buntin Media. "There are a lot of advertisers like that. When the economy is sluggish, you're looking to squeeze efficiencies."

There was also robust growth from automotive, entertainment, computers and office equipment. New categories, such as financial services and pharmaceuticals, also are poised to spend more dollars in the medium. "Part of the reason so many advertisers are discovering or rediscovering outdoor is the realization that people are so mobile," says Freitas. "The average American commutes 54 minutes to and from work."

Also fueling outdoor's growth are cash-strapped municipalities in the nation's largest markets, which have been granting more franchises for street furniture and transit placings. Last year, the city of Los Angeles awarded Viacom and JCDecaux a 20-year street-furniture deal that includes bus shelters and public toilets; JCDecaux also won a similar contract for Chicago. New York is now accepting bids to build out its street-furniture franchise. Airports, which were a $25 million business a decade ago, will bring in more than $200 million, Miller predicts.

The explosion in new types of outdoor advertising has made outdoor a much more targeted medium. Bathrooms, gas stations, baby boards and even bridal shops are potential places for ad placement. Allstate Insurance purchased baby boards and bridal shops with a "these hands" campaign to reach young parents and brides. Mediaedge:cia's Miller developed an outdoor program in skateboard parks to reach young men.

With Arbitron and Nielsen competing to set up an outdoor ratings service, the medium, which currently gets only 2.5 percent of advertising dollars, will soon have a powerful tool for generating revenue and quantifying its reach compared with other media. "The missing link is to be able to compare outdoor with other media," says Matalone. "If we can break it down to specific demographics, that's going to be a big impact for us." ■

SPENDING: OUTDOOR

PAST		
1998		$4.4
1999		$4.8
2000		$5.2
2001		$5.2
2002		$5.2
PRESENT		
Jan.-June 2003		$2.8
FUTURE		
2004	Veronis	+3.9%
	Zenith	+6.0%
	PwC	+5.9%

All dollar values in billions.
Source: OAAA

A Building Year

Interactive has been down so long, it's got nowhere to go but up BY ANN M. MACK

IMAGE IS EVERYTHING: As users migrate to high-speed connections, rich-media ads like this British Airways ad from Agency.com become more effective.

The light at the end of the tunnel is growing brighter for online advertising. The proliferation of broadband users, rich-media ads and better metrics, among other factors, are expected to drive a slow but steady recovery for the sector. This year's increase in online ad spending—the first since plunging a combined 23 percent in 2001 and 2002—is expected to be followed by another in 2004 and subsequent years, according to analyst reports.

Still, the growth "especially when you're down in the dumps is sometimes misleading," warns Kevin Carton, global leader of the media and entertainment practice at Pricewaterhouse-Coopers. "It's the boom, the bust and the build back up." Says Leo Kivijarv, director of research and publications at Veronis Suhler Stevenson, "The only place it had to go was up." By most estimates, spending levels will not surpass 2000's peek of $8.2 billion until at least 2006.

Advertisers will allocate about $7 billion to Web advertising next year, a PwC report predicts, up 6 percent from an estimated $6.6 billion in 2003. Post-2004 projections from Veronis Suhler Stevenson are less bullish than PwC's. While PwC anticipates a 10 percent compound annual growth rate from 2005 to 2007, Veronis offers a more modest 7 percent figure.

Explains Veronis' Kivijarv: right now, advertisers see the Internet as a low-cost alternative to mainstream media. However, he anticipates, "If the economy gets out of its funk, they will go back to TV for 2004 and 2005."

No matter what, the habitual consumption of news, entertainment and goods on the Web can't be overlooked. Overall. Internet penetration will hit a "saturation" level of nearly 70 million households next year, thus making the medium appealing for advertisers, reports PwC's Carton.

The sector's resurrection can be attributed in part to new forms of online advertising.

Rich media advertising, for one, has gained traction over the past couple of years, with marketers putting $212 million behind it last year. The ads, which deliver sound and full-motion video, benefit in their resemblance to offline formats. "When someone sees something that strikes them in their gut as advertising, all of a sudden they say, 'We should be doing that,'" explains Michael Zimbalist, executive director of the Online Publishers Association.

"Rich media is more akin to TV. It's easier to understand and explain. By all indications, it's more effective than flat ads," says Chan Suh, chairman and CEO of Agency.com, a New York-based Omnicom Group i-shop that has crafted rich-media campaigns for clients like British Airways and Discovery Channel.

And one of rich media's drawbacks—the format's incompatibility with dial-up connections—is diminishing as Internet users migrate to high-speed services. Households subscribing to broadband services are projected to grow 27 percent from 19.8 million this year to 25.2 million next year, according to PwC, while those using narrowband will shrink 3 percent from 44.2 million to 42.8 million.

Also contributing to online advertising's recovery is Web publishers' growing acceptance of various ad units. Over the last few years, online properties have added rich media, as well as half-page ads and skyscrapers, to their inventory in an attempt to attract marketers with bigger creative palettes. It appears to be paying off: an OPA poll of 24 online publishers, including New York Times Digital and ESPN.com, showed that first-quarter ad revenue grew an average of 41 percent over the year-ago period.

Keyword search advertising is another format that promises to bring in dollars from companies seeking to position their products on highly trafficked search engines. The increasing importance of this type of advertising, where companies pay for a favorable spot or more frequency in search-result listings, is further evidenced by Yahoo!'s $1.63 billion proposed acquisition of Overture, a provider of pay-for-performance search. The deal aims to take advantage of the burgeoning segment, which is projected to grow from about $2 billion by year-end 2003 to about $5 billion by 2006, according to Piper Jaffray.

As online advertisers and publishers embrace new ad formats, media planners and buyers are adopting reach-and-frequency tools, which let them apply the same metrics used to evaluate offline campaigns to the Internet. These recently introduced tools will help marketers compare the Web's effectiveness with other media, thus putting the Internet on an equal footing, according to PwC's Carton.

Roni Jenkins, partner, director of communications strategy at digital@jwt, the interactive arm of WPP Group's J. Walter Thompson in New York, says that these tools will likely resonate with brand marketers. "It allows us an apples to apples comparison across various media vehicles," she explains. "Clients speak in reach/frequency, GRPs and audience. ... It is a language they understand and know and tend to respond to." Adds Carton, "Before it was a wing and a prayer." ■

Ann M. Mack, a reporter for Adweek, *edits the* IQ newsletter.

SPENDING: INTERACTIVE

PAST		
1998		$1.9
1999		$4.6
2000		$8.2
2001		$7.2
2002		$6.3
PRESENT		
Jan.-June 2003		$3.2
FUTURE		
2004	Veronis	+6.0%
	Zenith	+8.0%
	PWC	+6.1%

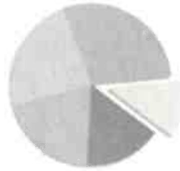
All dollar values in billions. Source: PwC, except 2003: TNS Media Intelligence/CMR

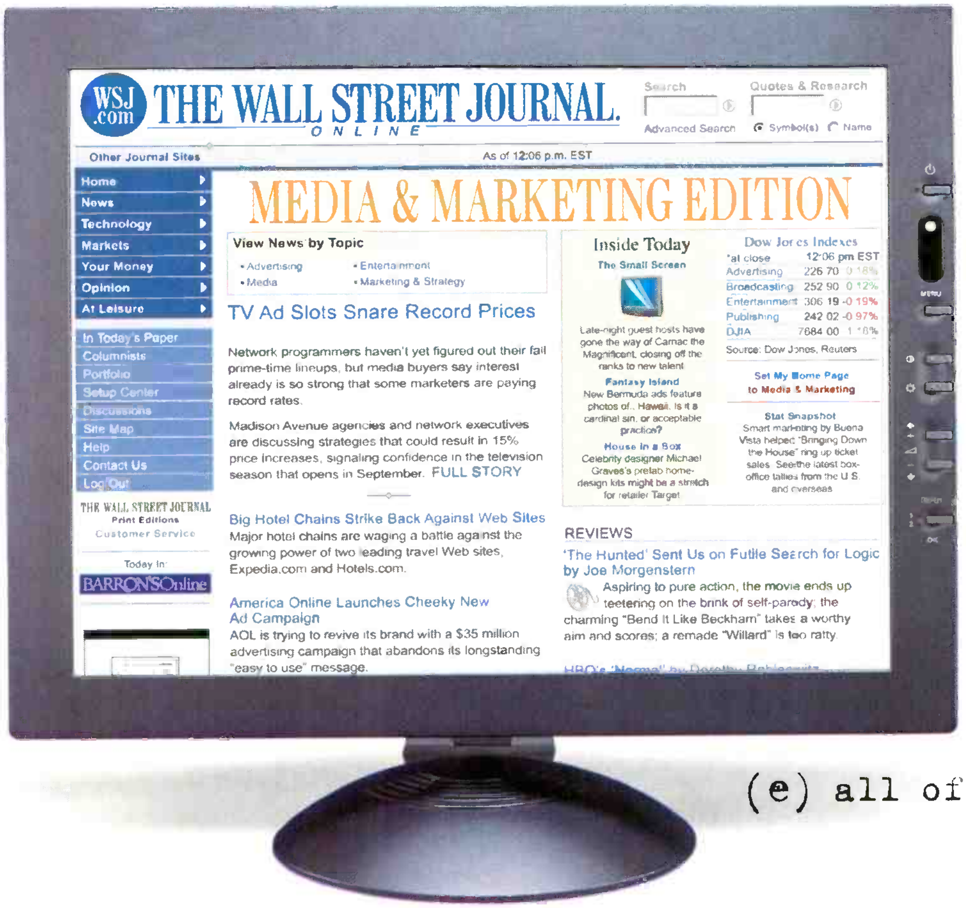
MUST-HAVE INDUSTRY TOOLS:

(a) advertising- 

(b) media- 

(c) entertainment- 

(d) marketing- 



(e) all of the above

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DOWJONES

NEWSPAPERS: THE ABCs

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Fulton County: 332,344 Households				
The Atlanta Journal-Constitution	99,196	133,241	29.8%	40.1%
Cobb County: 244,130 Households				
The Atlanta Journal-Constitution	54,157	92,985	22.2%	38.1%
Marietta Daily Journal	17,738	17,905	7.3%	7.3%
Gwinnett County: 230,357 Households				
The Atlanta Journal-Constitution	49,453	89,964	21.5%	39.1%
DeKalb County: 268,139 Households				
The Atlanta Journal-Constitution	54,508	90,163	20.3%	33.6%
Clayton County: 89,858 Households				
The Atlanta Journal-Constitution	13,964	24,769	15.5%	27.6%
Cherokee County: 51,942 Households				
The Atlanta Journal-Constitution	9,549	17,980	18.4%	34.6%
Cherokee Tribune	5,849	6,515	11.3%	12.5%
Marietta Daily Journal	473	522	0.9%	1.0%
Douglas County: 33,927 Households				
Douglas County Sentinel	5,388	4,500	15.7%	13.1%
The Atlanta Journal-Constitution	5,363	10,956	15.8%	32.3%
Fayette County: 32,236 Households				
The Atlanta Journal-Constitution	10,196	18,341	31.6%	56.9%
Carroll County: 31,948 Households				
Times-Georgian	8,416	8,625	25.6%	26.2%
The Atlanta Journal-Constitution	3,480	6,098	10.9%	19.1%

Data is based on audited numbers published in the Audit Bureau of Circulations' Spring 2003 County Penetration Report

ARBITRON
RADIO LISTENERSHIP / ATLANTA

STATION	FORMAT	Avg. Qtr.-Hour Share: Morning Drive, 12+	Avg. Qtr.-Hour Share: Evening Drive, 12+
WSB-AM	News/Talk	13.0	9.3
WVEE-FM	Urban	10.2	8.7
WKLS-FM	Rock	6.0	2.8
WPZE-FM	Gospel	4.7	5.0
WSTR-FM	Top 40	4.4	4.2
WALR-FM	Urban Adult Contemporary	4.4	2.8
WKHX-FM	Country	3.7	4.7
WSB-FM	Soft Adult Contemporary	3.7	3.6
WHTA-FM	Urban Adult Contemporary	3.3	3.6
WNNX-FM	Modern Rock	3.2	3.3

Source: Arbitron Spring 2003 Radio Market Report

(*continued from page 16*) Cox-owned *The Atlanta Journal-Constitution* is the sole metropolitan daily in the market and the largest daily newspaper in the Southeast. The paper's Monday-Thursday circulation was 410,761 last March, while its Friday circulation was 454,796, according to the Audit Bureau of Circulations. A year-over-year percentage change is not available because of a reporting change to ABC. The *AJC*'s Sunday circ rose 2.9 percent to 658,581 from March 2002 to March 2003.

In November 2001, Cox ceased publication of the city's afternoon daily, *The Atlanta Journal*, after a decade of declining circulation. *The Journal* had published since 1883. The paper was folded into its sister morning paper, *The Atlanta Constitution*, founded in 1868. The two papers had already shared an edition on weekends and holidays. Although the change officially happened in late 2001, the new distribution system was not implemented until '02.

Among changes in the past year, the *AJC* relaunched its weekend entertainment and lifestyle section after moving it from Fridays to Thursdays. The new section, called accessAtlanta, went from a broadsheet to a tabloid format. The revamped section has "created a lot of buzz," says Hank Klibanoff, who was named the *AJC*'s managing editor for news last October. Klibanoff had previously served as deputy managing editor at *The Philadelphia Inquirer*.

The accessAtlanta section is available in the paper, and an additional 10,000 to 20,000 free copies are distributed at various retail outlets around the city. In addition, the paper launched an accessAtlanta Web site (*accessAtlanta.com*) as a complement to the print version of the section.

At the same time accessAtlanta launched, the *AJC* introduced a new Friday section called Movies & More, which features movie reviews of new releases, offbeat columns about B-movies, as well as a sprinkle of information on other topics from food to local happenings.

While it hasn't embarked on a redesign, the *AJC* has implemented considerably more graphics in its pages. Klibanoff describes the "major emphasis on graphic presentation" as part of the paper's attempt to be "much more explanatory" for readers. For instance, when Space Shuttle Columbia exploded in February, the *AJC* published an expansive graph on page A1 illustrating, as best could be determined at the time, what may have gone wrong.

The paper has also gotten "much more engaged on the major issues affecting the state," says Klibanoff, who doubled the daily's number of statehouse reporters from four to eight in the past year.

State issues, given the budget crunch Georgia is facing, are of particular interest. But the actions of the state legislature pale in comparison to the rabid following of local sports fans. Acknowledging that passion, the *AJC* has also made a significant commitment to high school sports this year, both in space and personnel, says Klibanoff.

Gwinnett County is one of the fastest-growing counties in America, due in part to affordable property and job opportunities. Eight new schools opened up in the county this year alone, with six of the eight needing to use trailers for additional classroom space. Ten more new schools are set to open next year.

To try to capture some of this potential audience, the *AJC* publishes an extra section called Gwinnett. Subscribers in the county

NIELSEN RATINGS / ATLANTA
EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

Evening News

Time	Network	Station	Rating	Share
5-5:30 p.m.	ABC	WSB	10.5	21
	Fox	WAGA	5.6	11
	NBC	WXIA*	4.6	9
	CBS	WGCL	2.5	5
	WB	WATL*	1.9	4
	UPN	WUPA*	1.4	3
	Pax	WPXA*	0.3	1
5:30-6 p.m.	ABC	WSB	10.5	21
	Fox	WAGA	5.6	11
	NBC	WXIA*	4.6	9
	CBS	WGCL	2.0	4
	UPN	WUPA*	2.1	4
	WB	WATL*	1.9	4
	Pax	WPXA*	0.3	1
6-6:30 p.m.	ABC	WSB	11.2	21
	Fox	WAGA	4.5	8
	NBC	WXIA	4.4	8
	UPN	WUPA*	2.8	5
	WB	WATL*	2.2	4
	CBS	WGCL	1.9	4
	Pax	WPXA*	0.2	#
7-7:30 p.m.	NBC	WXIA	4.4	8

Late News

Time	Network	Station	Rating	Share
10-11 p.m.	Fox	WAGA	6.9	11
11-11:30 p.m.	ABC	WSB	9.9	18
	NBC	WXIA	5.9	11
	Fox	WAGA*	3.6	7
	WB	WATL*	2.9	5
	UPN	WUPA*	2.8	5
	CBS	WGCL*	2.4	4
	Pax	WPXA*	0.4	1

#Share below reporting level. *Non-news programming. Source: Nielsen Media Research, July 2003.

ARBITRON
RADIO OWNERSHIP

Owner	Stations	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Cox Radio	1 AM, 4 FM	22.5	$110.9	30.1%
Clear Channel Communications	1 AM, 5 FM	14.7	$64.6	17.5%
Infinity Broadcasting	1 AM, 2 FM	12.8	$59.7	16.9%
Jefferson-Pilot	1 AM, 1 FM	4.5	$32.8	8.9%
Susquehanna Radio	2 FM	5.7	$25.4	6.9%
Radio One	3 FM	11.6	$25.3	6.9%
ABC Radio	1 FM	2.7	$8.6	2.3%
Dickey Brothers Broadcasting	1 AM	0.7	$3.9	1.1%

Includes only stations with significant registration in Arbitron diary returns and licensed in Atlanta or immediate area. Share data from Arbitron Spring 2003 book; revenue and owner information provided by BIA Financial Network.

receive the regular metro section, plus the local section with zoned stories seven days a week. Klibanoff says the paper is working to improve its ability to zone the front page for subscribers in Gwinnett County as well.

Besides the *AJC*, Cox also owns a 25 percent stake in Tampa, Fla.-based alternative newspaper chain Creative Loafing Inc., whose flagship is *Creative Loafing Atlanta*. Its audited free circulation as of last March was 142,648.

The market is also home to many competitive community dailies and weeklies. Among other print publications in the market are a number of local general and special-interest magazines in the market. Emmis Communications' 42-year-old city pub *Atlanta* magazine is the predominant lifestyle magazine not only in Atlanta but also for the whole state.

Atlanta Business Chronicle is a weekly business publication that serves the region and is owned by American City Business Journals. Family-owned *Atlanta Daily World*, now a weekly, is the city's oldest continually published newspaper serving metro Atlanta's African-American community; it was founded in 1928. While there is only one Spanish-language broadcast TV station, there are more than a dozen Spanish-language newspapers, most of which are free weeklies. The market's only paid Spanish-language paper is *La Vision de Georgia*.

Cox Radio dominates its home market. The company owns five radio stations, including the market's No. 1 station, WSB-AM. The News/Talk powerhouse is also the market's top biller, grossing an estimated $42 million in revenue in 2002, according to BIA Financial Network. Cox controls 30 percent of the No. 11–ranked Atlanta radio market's ad pie. Clear Channel Communications and Infinity Broadcasting are the next closest competitors in terms of market share, followed by Jefferson-Pilot, Radio One and Susquehanna Radio.

Although it owns just one station that shows up in the Arbitron survey, ABC Radio has a virtual lock on the Country genre with its WYAY-FM. That station alone pulls in about a 2.3 percent share of the ad market.

Last March, Cox tossed the Oldies format it had on WFOX for the past 14 years in favor of an Urban format targeting African Americans 25-34. WFOX became the market's fifth station playing R&B and hip-hop. Cox already owns older-skewing Urban Adult Contemporary WALR-FM.

With the move at WFOX, Cox goes head-to-head with the market leader in the format, Infinity Broadcasting's WVEE-FM. WVEE, No. 2 in the market overall, didn't seem to be affected by the change. In the Spring book, the station saw its share climb to a 9.6 from an 8.6 among listeners 12-plus in the Winter book. WFOX, which had launched by playing 10,000 songs in a row commercial-free to attract listeners, did a 1.7 share in the Spring book.

Just after Cox made its move, Clear Channel flipped its Classic Rock WLCL-FM to Oldies to fill the void, at the same time giving up its losing battle with the market's dominant Classic Rock outlet, Infinity's WZGC-FM. Susquehanna has the leading Modern Rock station in WNNX-FM, which is well ahead of its direct competitor, Clear Channel's WBZY-FM. WFOX has lost listeners with its move, while the change seems to have paid off for WLCL. The latter station did a 2.3 share in the Spring report.

Clear Channel Outdoor, Viacom Outdoor, Lamar Advertising and Douglas Outdoor Advertising are the main outdoor-advertising players in the market. The outdoor marketplace generated $42.5 million in 2002, compared to $40.3 million in 2001, according to Nielsen Monitor-Plus. ■


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media elite

EDITED BY ANNE TORPEY-KEMPH

Quicktakes

Ain't we got fun: Grimes (c.) with Emmy pals Myers and Lowe

RYAN MILLER/CAPTURE IMAGING

SOME MEDIA EXECS CAME BACK from Los Angeles with good stories from the Emmys. *Entertainment Weekly* m.e. **Rick Tetzeli**, for one, tells of getting accessorized with a blue cocktail napkin by *Queer Eye* guy Carson Kressley and watching *West Wing* star Alison Janney dance on the banquettes at *EW*'s pre-awards party at White Lotus. Meanwhile, *Glamour* publisher Suzanne Grimes got up-close and personal with some major A-listers. Her table at lunch on the Peninsula Hotel's roof deck had a view of James Gandolfini taking a swim in the pool. Shortly after spotting *The Sopranos* boss, Grimes made fast friends with *West Wing* alum Rob Lowe during an elevator ride. And later that evening at *Glamour*'s post-Emmy party at the Mondrian Hotel, she had the best seat in the house, between the boyishly handsome Lowe and the boyishly funny Mike Myers...Hurricane Isabel threatened, but there was no shortage of power at New York's Grand Hyatt Hotel recently when the Library of American Broadcasting paid tribute to the "First Fifty Giants of Broadcasting." The all-star guest list included **Joan Ganz Cooney**, executive director, Children's Television Workshop; **Walter Cronkite**; **Ragan Henry**, a pioneer in the ownership of TV and radio stations by African Americans; and **Stanley S. Hubbard**, a pioneer in direct broadcast satellite. As **Tony Malara**, former president of affiliate relations for CBS, effused an introduction of Cronkite, the honoree strode up to the podium and put his arm around the host, saying he much prefers long intros to the "and now, a man who needs no introduction" type—"In fact, I only attend these events for the effusive intros," Cronkite quipped. But he wanted to keep things moving because there was a film crew waiting for him...Since his makeover, **Dan Restione** is looking at life through rose-colored glasses instead of Coke-bottle lenses. "I'm more confident, more optimistic," says the longtime morning-drive producer for Seattle's KIRO-AM and subject of the season-premiere of ABC's *Extreme Makeover*. A love interest of Restione's had wanted to apply as an *EM* candidate, so he said he'd do it with her. The show's producers happened to come to Seattle for a casting call a few days later, and Restione interviewed them for KIRO's morning show. Next thing you knew, "I was standing there in my paper gown waiting to get anesthesia" for a liposuction procedure, he recalls. If Restione had any misgivings then, they're long gone amid the swirl of publicity—he's been on *Good Morning, America* and will soon be featured in *People* and *TV Guide*. Seeing his future through Lasik-ed eyes, Restione is now thinking big: "Maybe talk shows, TV or acting." ■

Move it along: Cronkite (l.) to Malara at "Fifty Giants" event

Dan the *Makeover* man, before (l.) and after

CAROL KAELSON/ABC

Movers

NETWORK TV

Carlos Bardasano has joined Univision as vp, program development, reporting to Mario Rodriguez, president of entertainment for Univision Networks. Bardasano was most recently vp of programming at Univision rival Telemundo, and before that he held posts at Universal Studios, Paramount Pictures and Columbia Tristar...**John Cora** was named director of research, CBS Television. Cora was most recently senior manager, programming research at ABC Cable Networks.

CABLE TV

Tricia Garrett Melton was named senior vp of marketing for TBS Superstation. Previously, she was vp of marketing for Lifetime, overseeing consumer, affiliate and ad sales, including the launch of two original series and several programming specials. Melton has also worked for Oxygen and Food Network.

MAGAZINES

Wendy Nanus has rejoined Condé Nast Publications' *Self* as advertising director, replacing Daniel Fuchs. Most recently, she was an ad director in the Condé Nast Bridal Group, but she had been with *Self* in the late '90s as ad director and left in 1999 to become associate publisher at Hearst Magazines' *CosmoGirl!*.

RADIO

Scott Karnedy was named senior vp of sales and marketing solutions for XM Satellite Radio. Karnedy had been senior vp and director of national sales at Infinity Broadcasting...**Jeff Zuchowkski** was named program director of WKTU-FM, Clear Channel's Rhythmic Contemporary Hit Radio station in New York. He had been acting program director since May...**Lance Richards** was named general sales manager of WKQX-FM, Emmis Communications' Modern Rock station in Chicago. He had been executive vp of sales and strategic marketing at IP2M, an online publisher of health content. Richards replaces Matt White, who is retiring later this year for health reasons...**Ron Atkins** was upped to acting head of entertainment programming, from senior director of entertainment programming, for American Urban Radio Networks.

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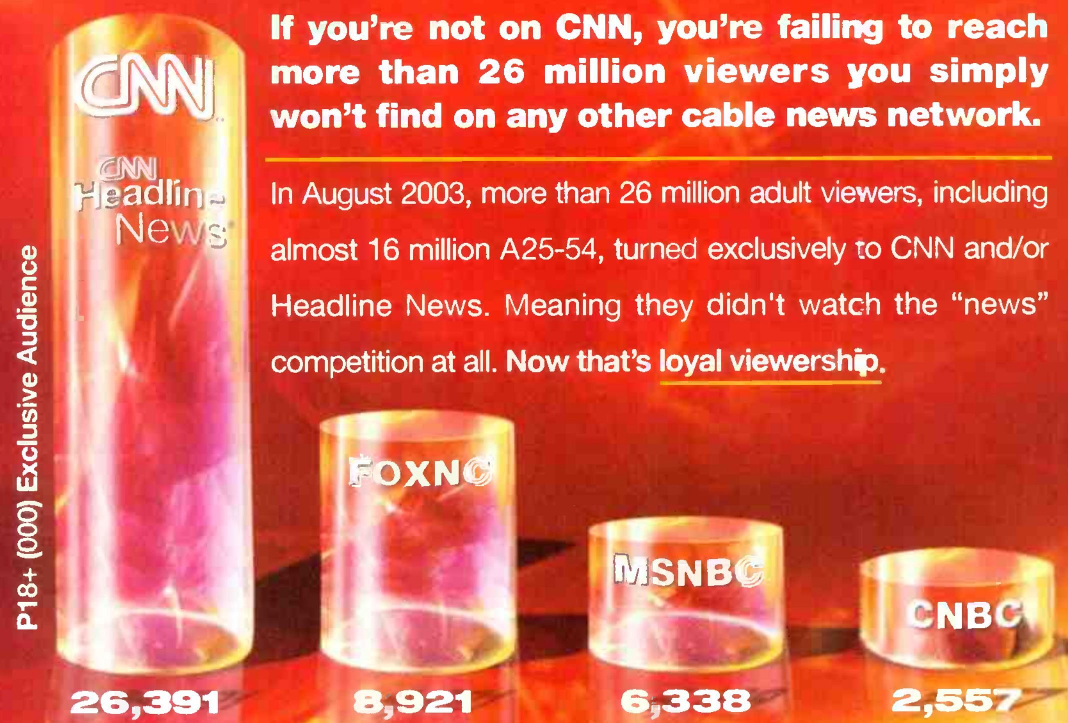

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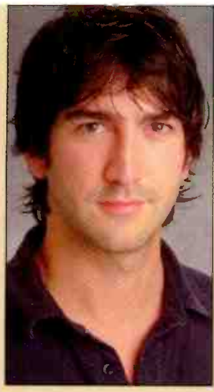


Josh Schwartz Creator, *The O.C.*

As a kid in summer camp, Josh Schwartz spent his free time writing James Bond stories. These days, the 27-year-old is lucky to have any free time at all. As creator of Fox's hot new drama *The O.C.*, Schwartz wrote the first two episodes himself, then took on a writing staff of six, which he now oversees. He says he's too busy to even visit the set, spending most of his time supervising the writers (all younger than he); helping to select music for the show, which he feels is very important to its success; and working on postproduction.

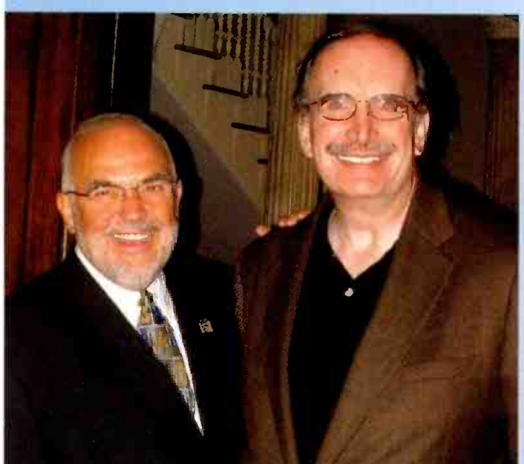
Since its Aug. 5 premiere, *The O.C.*'s ratings have increased by 14 percent among households and 41 percent in adults 18-49, and has shown similar double-digit gains in teen demos. "We expected the show to draw younger audiences and women, but what's so amazing is that parents, grandparents and such a large number of men are watching," Schwartz says.

Schwartz says the storyline, about a troubled teen from a low-income family who is invited by a public defender to live with his family in wealthy Newport Beach, Calif., is not autobiographical. But real life does shape some of the characters. "There is a lot of my dad in Sandy [the public defender played by Peter Gallagher] and a lot of me in Seth [a co-lead character played by Adam Brody]," says Schwartz.

The O.C. wasn't Schwartz's first idea for a TV series nor his first script. While attending USC's School of Cinema-Television in 1995, he sold a somewhat autobiographical screenplay to Columbia Pictures. After that, he sold a script to ABC that was made into a pilot, and after leaving film school a year before graduating, he had another pilot done by the WB. Last year he met with Fox to pitch another idea, and eventually his agent hooked him up up with the producer named McG, who was working on Fox drama *Fastlane*. Together they came up with the concept for *The O.C.*, drawing on some of McG's experiences growing up in Newport Beach. "But [McG, now *The O.C.* exec producer] has been very supportive and told me this is my show," Schwartz says.

The O.C. is currently on hiatus during Fox's airing of postseason Major League Baseball, but it will return in a new, super-competitive, Thursday 9 p.m. timeslot on Oct. 30. Schwartz isn't worried: "I think we have surprised a lot of people so far, and I think wherever Fox puts us, the audience will follow." *—John Consoli*

Dish



At Syracuse University's Lubin House in New York, CABLEready presented its annual award to a media management graduate of SU's S.I. Newhouse School of Communications. On hand were Gary Lico, president/CEO, CABLEready (l.), and Bill Carroll, vp, Katz Television.

(L. to r.) Hempstead, N.Y., Mayor James Garner, U.S. Surgeon General Richard H. Carmona, and ABC Radio Networks chief marketing officer Kevin Miller in Baltimore recently for "Take a Loved One to the Doctor Day," part of an ongoing partnership of the U.S. Department of Health and Human Services and ABC Radio Networks to provide critically important health information to minority populations

inside media

NEWS OF THE MARKET

Ads Pour In for *NYT Mag*'s "Luxury Homes"

The New York Times Magazine's 25th anniversary issue of its "Luxury Homes & Estates" special advertising section, which publishes on Oct. 19, has grown to 53 ad pages, the most ever for the section and a 10.4 percent increase over the 2002 issue. The section, which attracts real estate advertisers—Coldwell Banker, Halstead Properties, Prudential, Douglas Elliman, Sotheby's Realty and Trump Real Estate among this year's lineup—includes a feature advertorial offering a retrospective of the changes made in luxury home design over the last quarter century. Separately, *The New York Times* newspaper last week announced it now is available for home delivery in 250 markets in the U.S., up from 62 seven years ago.

OLN Tracks Elusive Beasts

Outdoor Life Network on Sept. 27 launched *Mysterious Encounters*, a new series that combines outdoor adventure and forensics to investigate the bizarre creatures rumored to roam the woods, swamps and plains. The series follows crypto-zoologist (someone who studies creatures whose existence has not been substantiated) Autumn Williams and her team as they search various locales in the U.S. for the elusive beasts, including the Louisiana Swamp Creature and the Florida Skunk Ape. The half-hour series airs at 10:30 p.m.

Fairchild to Relaunch *Elegant Bride*

Fairchild Publications will relaunch *Elegant Bride*, which it purchased in July from Pace Communications, with the summer 2004 issue to hit newsstands March 16. Margaret Kennedy, formerly editor in chief of Hearst's recently shuttered *Victoria* magazine, has been named editor in chief.

Pages, Rate Base Up at *People en Español*

Time Inc.'s *People en Español* will increase its rate base to 425,000 from 400,000 with the January issue. Through October, the monthly's ad pages were up 24.8 percent to 608 pages over last year, according to *Mediaweek* Magazine Monitor. August 2003 was the debut issue for editor Richard Perez Feria, who joined from San Francisco's *7X7* magazine in April, and the best-selling *PeE* issue since May 1999.

AURN Adds Hip-Hop News

American Urban Radio Networks has launched the radio industry's first news and entertainment report covering the urban hip-hop culture. The twice-daily, three-and-a-half minute report, called *The Hip-Hop Wire*, is hosted by Anji Corley and features news, opinion and interviews with prominent hip-hop artists.

Tulsa to Get Nielsen Meters in April

Nielsen Media Research will begin meter measurement in Tulsa, Okla. (the 60th-largest TV market), next April, making it the company's 56th metered TV market. Initially the service, which measures TV viewing using a combination of set-tuning meters and diaries, will launch with 300 sample homes,

Pam Expands the Brand to Radio

Pamela Anderson is taking her talents to satellite radio. The former *Baywatch* babe will premiere live on Sirius Oct. 3 as host of *Club Pam*, talking about her public and private life, playing music and taking calls. The hour-long show, Anderson's first radio venture, will air Fridays at 5 p.m. and repeat at 6. Anderson also will be featured in Sirius' marketing and promotional activities, including TV commercials, and a training video for retail personnel. Anderson is also one of the celebrities contributing to "Bras for a Cause," a charity auction to be presented by Boston's WROR-AM of celeb-designed bras to benefit several breast cancer research funds. Separately, Sirius will air complete play-by-play coverage of Major League Baseball's Divisional Series, League Championship Series and World Series on its ESPN Radio channel, beginning Sept. 30.

Gettin' Sirius: Anderson will host her first radio show starting Oct. 3.

Calendar

The National Association of Broadcasters will present the **NAB Radio Show** Oct. 1-3 at the Pennsylvania Convention Center in Philadelphia. The event will include a keynote address by Rush Limbaugh, educational sessions and technical workshops. Visit www.nab.org.

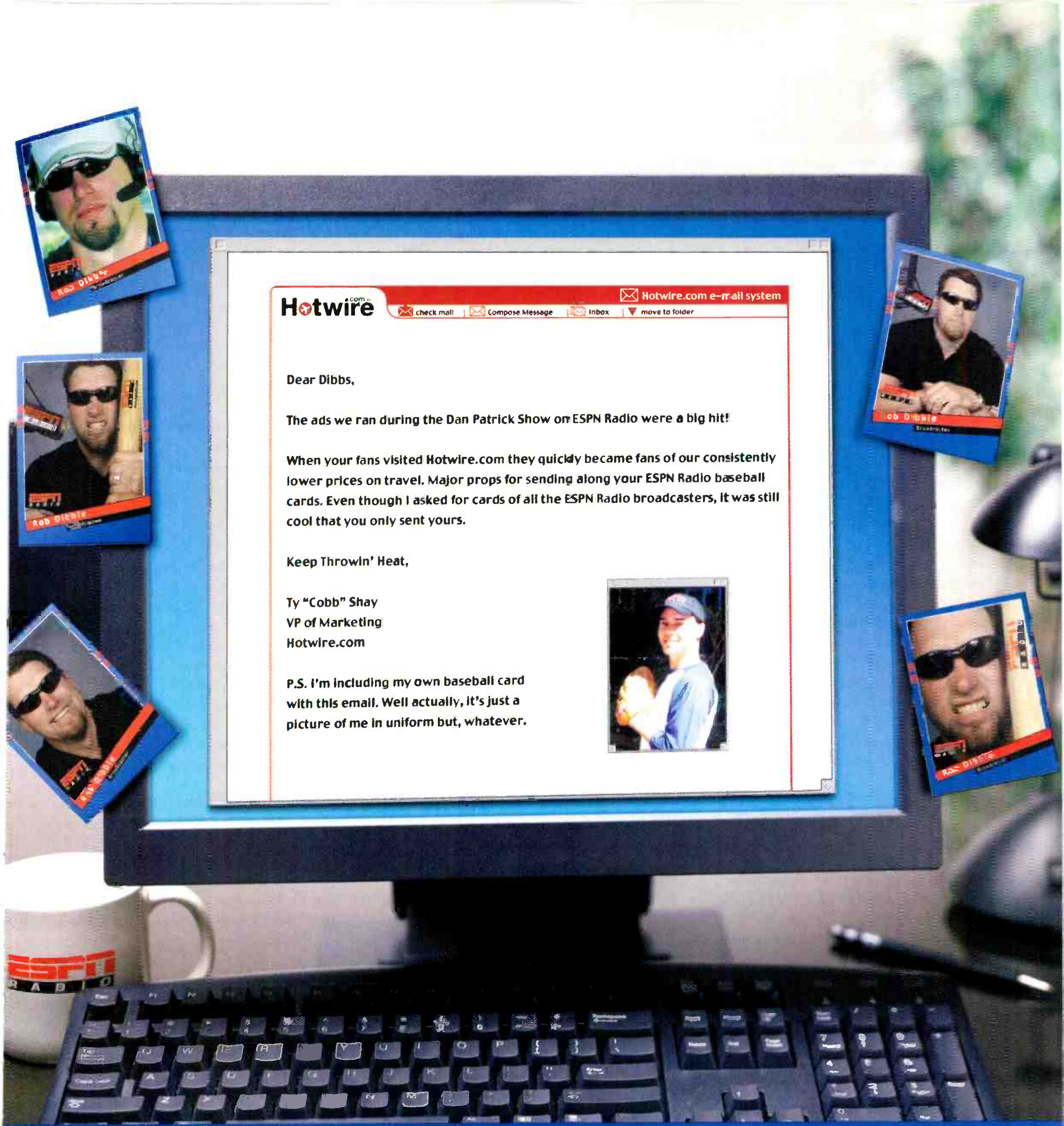
American Business Media will present the **Fast Track Media Management Program** Oct. 8 at the Westin Los Angeles Airport Hotel. The one-day seminar will provide a deep understanding of the critical media disciplines and the synergistic relationships between print products, web sites and events. Contact: Jane O'Connor, 212.661.6360, ext. 3332, or j.oconnor@abmmail.com.

Magazine Publishers of America and the American Society of Magazine Editors will present the **American Magazine Conference** Oct. 19-22 at the Westin Mission Hills Resort in Rancho Mirage, Calif. Sessions will cover marketing to Gen Y, revitalizing brands, and dealing with issues related to the 2004 elections. Speakers include Arianna Huffington, political commentator and California gubernatorial hopeful; and Barry Diller, CEO of InterActiveCorp. Contact: 212-872-3700.

The WB will present a two-day conference, **"What Teens Want: Marketing to Teens age 12 to 17 Using Music, Movies and the Media,"** Oct. 27-28 at the Fairmont Miramar Hotel in Santa Monica, Calif. The event will be hosted by VNU's Adweek Magazines, *The Hollywood Reporter* and *Billboard*. Contact: 888-536-8536.

Magazine Publishers of America will present Ed Lewis, chairman and CEO of Essence Communications Partners, as featured speaker in its next **Breakfast With a Leader** event, Nov. 12 at the University Club in New York. Contact: 212-872-3755 or visit www.magazine.org.

Street & Smith's SportsBusiness Journal will present the **Sports Media & Technology conference** Nov. 13-14 at the Marriott East Side in New York. Contact: 646-742-9763 or visit www.sportsbusinessconferences.com.



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GSN to Strip *Millionaire*

MARIA MELIN/ABC

Philbin (r.) will be cable-ready Oct. 12.

Game Show Network has acquired the domestic distribution rights to the original prime-time game show *Who Wants to Be a Millionaire?* with original host Regis Philbin. Financial terms of the deal were not disclosed. GSN will begin airing *Millionaire* on Oct. 12 with a special four-hour marathon. Beginning Oct. 13, the show will be stripped nightly airing at 8 p.m. Eastern time/5 p.m. Pacific. Additionally, Game Show Network will produce an interactive TV component so viewers can play along with each installment of *Millionaire*. The British import premiered on ABC in 1999 and quickly became a hit; however, after two years of heavy repetition in prime time, *Millionaire*'s ratings began to decline.

expanding to 400 homes in April 2005. While meters are substantially more expensive than the current diary service, they provide overnight household ratings. Media outlets that have agreed to support meters in Tulsa include: KOTV, Griffin Communications' CBS affiliate; KWBT-TV, Cascade Broadcasting Group's WB affiliate; KOKI-TV and KTFO-TV, Clear Channel's Fox and UPN duopoly; and KJRH-TV, Scripps Howard Broadcasting's NBC affiliate.

NFL Network Hires *Playbook* Anchors

The NFL Network, which will launch on Nov. 4, has hired three former NFL players, all with experience at other networks as on-air TV football analysts, to anchor its prime-time *Playbook* show. Sterling Sharpe (seven years at ESPN), Glenn Parker (NBC arena league), and Solomon Wilcox (three years at CBS) will co-anchor the show, which will air at 10 p.m. Tuesday-Friday. NFL Network, which will carry programming on a 24-hour-a-day, year-round basis, has already cut a carriage deal with satellite operator DirecTV and is negotiating with cable operators.

SBS Sells San Antonio Stations

To help strengthen its balance sheet and pay off debt associated with its purchase of KXOL-FM in Los Angeles, Spanish Broadcasting System has agreed to sell KLEY-FM and KSAH-AM in San Antonio to Border Media Partners for $24 million. Both stations currently program a Regional Mexican format. The acquisition marks Border Media's first foray into the nation's seventh-largest radio market and the fifth-largest Hispanic market. Border was founded by Thomas Castro and RGG Capital Partners and currently operates six radio stations in McAllen-Brownsville and Laredo, Texas.

WE Aims Younger With Sitcom Buys

In an effort to attract younger females, WE: Women's Entertainment has acquired 46 episodes of sitcom *Ned and Stacey*, starring Debra Messing, and 55 episodes of sitcom *The Naked Truth With Tea Leoni*. The shows will begin airing Oct. 20 in prime access. They join *Felicity* and *Two Guys and a Girl* on the net's schedule. Financial terms of the deal were not disclosed.

Nassau Plans to Expand Digital Displays

Nassau Media Partners, the digital media arm of Nassau Broadcasting, has formed a strategic alliance with Tony Dillon, a former vp with Clarity Visual Systems, which provides Nassau's 10-by-2 1/2 digital display at the entrance to the New York/New Jersey Waterway ferry. The alliance will help NMP expand its digital display offerings in the area, said Joan Gerberding, president of NMP, a division spun off from the broadcasting company three years ago. NMP's current display, which reaches about 70,000 riders on the ferry each day, features a six-minute loop of advertising and content. Current advertisers include Provident Bank, Applebee's and Sun Microsystems.

Don & Mike Re-Up With Westwood One

Don Geronimo and Mike O'Meara, co-hosts of national radio show *The Don & Mike Show*, have reached a new long-term agreement with Westwood One, which will continue to syndicate the duo in afternoon drive. Launched into national syndication in 1991, *Don & Mike* airs on 40 stations, including flagship WJFK-FM, Infinity Broadcasting's Talk station in Washington, and sister station WXYZ-FM in Baltimore, which began running the show in March. In the nation's capital, *Don & Mike* cleans up in the ratings, ranking first among adults 18-34 and 25-54 and first among men 18-34, 18-49 and 25-54.

Arbitron Breaks Out Location Data

Beginning with the next RADAR network radio report, due out today, Arbitron will add ratings break-outs by three listening locations: at home, at work and in the car. The addition of the new estimates was facilitated when Arbitron changed RADAR's telephone-based methodology to the diaries the company uses to produce ratings for its local market ratings service. In the diary, Arbitron asks survey participants to indicate where they listened to the radio: at home, at work, in the car or some other place. According to Arbitron, 80 percent of persons 12-plus listen to radio in the car; 67 percent listen to radio at home; 25 percent listen at work; and 11 percent listen to the radio in some other place.

Hanrahan to Co-Anchor WFOR

Award-winning TV anchor Robb Hanrahan, most recently on-air at WABC, ABC's owned-and-operated station in New York, is moving back to his South Florida roots. On Oct. 13, Hanrahan will co-anchor the 5, 6 and 11 p.m. news with Maggie Rodriguez on WFOR, Viacom's CBS station in Miami. WFOR, which has been running second and third with its local news, has high hopes that its new local anchor team will vault it to the top of the ratings heap. While at WABC, Hanrahan helped the station develop its "Crime Stoppers" weekly report. Earlier in his career, Hanrahan was on-air at WSVN, Sunbeam Television's Fox affiliate in Miami.

Fewer Spot Radio Dollars Aimed at 25-54

The share of national spot radio advertising dollars allocated to adults 25-54 dropped to 43 percent in 2002, down almost two full percentage points from the previous year, according to a study by Interep. That's down from a high of 55.5 percent in 1995. Share of dollars placed against younger demographics has increased, with adults 18-49 up to 21.2 percent vs. 19.3 percent in 2001. ■

EAST

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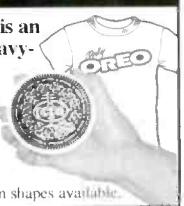

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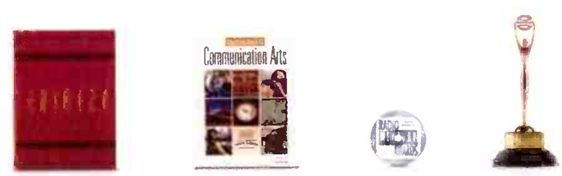

[ONE SHOW] [CA] [MERCURY] [CLIO]

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- Client database management, production report maintenance and project management.

Experience Requirements:
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MINIMUM: 1 Column x 1 inch for 1 week: $204.00, 1/2 inch increments: $102.00 week. Rates apply to **EAST** edition. **Special offers:** Run 2 consecutive weeks, take 15% off second insertion. Frequency, regional-combination, and national discounts available. Charge for ADWEEK box number: $35.00 per insertion. Replies mailed daily to advertisers. Readers responding to any ads with box numbers are advised not to send samples unless they are duplicates or need not be returned. We are not responsible for recovery of samples. **The identity of box number advertisers cannot be revealed.Confidential Service: To answer box numbers ads and protect identity: (1) Seal your reply in an envelope addressed to the box number; (2) In a seperate note, list companies and subsidiaries you do not want your reply to reach; (3) Enclose both in a second envelope addressed to CONFIDENTIAL SERVICE, Adweek, Classified Advertising, 770 Broadway, New York, NY, 10003.** If ADWEEK must typeset ad, charge is $25.00. **Deadline for all ads in ADWEEK EAST is Wednesday, 4:30 p.m.** If classified is filled prior to closing, ads will be held for the next issue, **Classified is commissionable when ad agencies place ads for clients. No proofs can be shown.** Charge your ad to American Express, Mastercard or Visa, **ADWEEK CLASSIFIED, 770 Broadway, 7th fl. New York, NY 10003.** 1-800-723-9335 Fax: 646-654-5313.

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We are currently seeking a business savvy individual with a talent for multi-tasking, to oversee and work with the sales management and sales planning management divisions in our ESPN Outdoors Department. Based in **New York City**, the successful candidate will develop, execute and manage the sales planning and pricing functions, collaborate with management on sales packaging and pricing strategies, construction and rationale, and create sales proposals. In addition, you will manage stewardship, provide inventory analysis, maintain all aspects of our commercial inventory, trouble-shoot system and commercial inventory issues and coordinate program schedule changes and additions.

To qualify you must have a Bachelor's Degree, along with 3+ years of sales planning experience with a cable network. Knowledge of the advertising sales process and related procedures is a must. Excellent communication, organizational, computer and presentational skills will prove essential to the position. Interest and love of sports is a major plus.

We offer a competitive salary and comprehensive benefits package. **Please e-mail your resume as an MS Word attachment to: recruiterkp@espn.com. No phone calls please. Only qualified applicants will be contacted at this time.** ESPN is an EOE/AAE

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The Ad Council, the country's leading provider of public service advertising (Smokey Bear, "Friends don't let friends drive drunk" and "I am an American") is looking for a Director of Operations - Media in its New York office. It is a great opportunity to put your advertising agency Media planning skills towards supporting important social causes.

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The qualified candidate will have minimum 2 years advertising agency, media planning experience. Must have knowledge of planning for all media (TV - broadcast & cable, radio, print, outdoor), outstanding writing and presentation skills, strong computer skills in MS-Office (Excel, Word) and excellent management skills.

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SENDING THE FILE • Crop The Ad To Size • Save As A Photoshop EPS Or TIFF • Compress The File Using Stuffit Or A Zip Program • Send To : classified@bpicomm.com

Culture Trends

TEEN PEOPLE TRENDSPOTTER™

HOT PICKS FOR SEPTEMBER

Teen People's Trendspotters are a community of self-appointed influencers between the ages of 13-24 who keep the magazine's editors abreast of emerging trends in teen culture...

PUMPS

The pump is back and Trendspotters are sporting this 80s style show w/minis, jeans and capris...

PLEATED SKIRTS

Our female Trendspotters tell us that these skirts are being sported in all different prints/fabrics - plaids and denim seem to be the most popular...

LIP SMACKERS

Soft drink collection by Bonne Bell. Dr. Pepper and Grape Crush are favorites...

BANGS

Beyonce and Gwenyth are leading the way...

BENJAMIN MCKENZIE

Known for his role as Ryan on the Fox hit The O.C., a troubled outsider who is taken in by a rich family...

DASHBOARD CONFESSIONAL

With one of the most adoring fanbases in the music industry following the release of their latest record, *A Mark, A Mission, A Brand, A Scar...*

TWEED

The hot fabric for Fall - different yet sophisticated...

ANDY RODDICK

After capturing his first Grand Slam title, he's now more than just a pretty face dating another pretty face - Mandy Moore that is...

SOURCE: *Teen People*

THE HOLLYWOOD REPORTER'S BOX OFFICE

THIS WEEK	LAST WEEK	PICTURE	WEEKEND GROSS	DAYS IN RELEASE	TOTAL GROSS
1	NEW	***UNDERWORLD***	21,753,759	3	21,753,759
2	NEW	***SECONDHAND LIONS***	12,139,832	3	12,139,832
3	NEW	***THE FIGHTING TEMPTATIONS***	11,758,372	3	11,758,372
4	1	***ONCE UPON A TIME IN MEXICO***	11,007,367	10	40,951,922
5	NEW	***COLD CREEK MANOR***	8,190,574	3	8,190,574
6	2	***MATCHSTICK MEN***	7,552,427	10	24,233,745
7	3	***CABIN FEVER***	3,909,896	10	14,722,225
8	4	***DICKIE ROBERTS***	3,783,655	17	17,302,664
9	5	***PIRATES OF THE CARIBBEAN***	3,480,968	75	292,495,912
10	15	***LOST IN TRANSLATION***	2,622,737	10	3,957,342

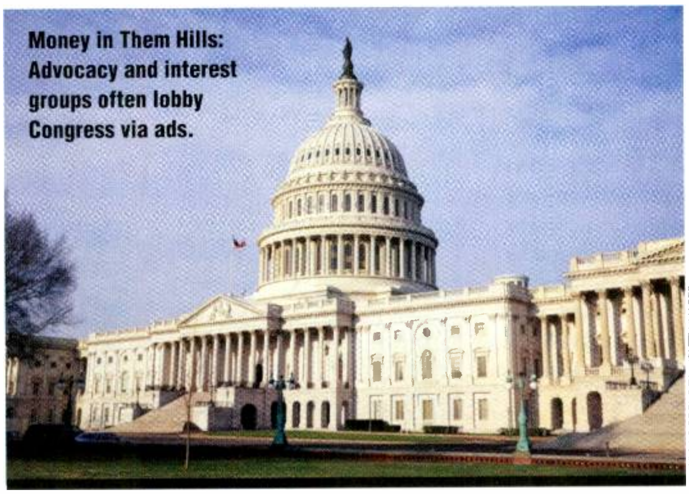
For week ending September 21, 2003

Source: *Hollywood Reporter*

Capitol Gains

Heading into an election year, newsweeklies and political magazines prep for an advertising windfall

WITH THE FIRST OF THE DEMOCRATIC PRESIDENTIAL PRIMARIES JUST FOUR MONTHS away, political magazines and newsweeklies are gearing up for their election coverage and eagerly awaiting the bounty of advertisers that typically sign on. Like broadcasters, for which an election year is an advertising bonanza, magazines can expect to see as much as a 25 percent bump in revenue. Political titles, from the liberal-leaning *New Republic* to the conservative *National Review*, draw a bevy of beltway-insider ads, ranging from advocacy and lobby groups to corporate, organization and foreign-government image ads. Newsweeklies, which reach millions of readers, often attract advertisers that sponsor special editorial sections, and generally see an uptick in spending from automakers and financial services. According to the Publishers Information Bureau, spending in the Government, Politics & Organizations category has been on the rise. Spending in magazines more than doubled from 1996 to 2000 to $73.1 million; in 2002, revenue from political ads hit $133.8 million.



Money in Them Hills: Advocacy and interest groups often lobby Congress via ads.

GEORGE GIBBONS/TAXI/GETTY IMAGES

"Corporate and interest groups have learned that if they want to play in this town, they need to advertise," says John Fox Sullivan, group publisher/president of congressional bible *National Journal* and *The Atlantic Monthly*. "They have to have a presence here. And the need to do so during an election year is all the more critical."

The 2004 election will be particularly welcomed by the weeklies given the challenging ad climate most have suffered through this year. *The New Republic* through Sept. 29 saw its ad pages drop 14.1 percent to 243 versus the prior year, reports the *Mediaweek* Monitor. News Corp.'s *Weekly Standard* is also down, by 6.3 percent to 287, and biweekly *National Review* through Oct. 13 fell 4.3 percent to 267. On the upside, *Newsweek* through Sept. 29 grew 4 percent to 1,393 pages, and *National Journal* through August grew 20.8 percent to 547 pages, reports PIB.

"Election years have been good years for us historically," says Greg Osberg, *Newsweek* executive vp/worldwide publisher. "At *Newsweek*, election years are like Olympics years for *Sports Illustrated*."

For the 2000 presidential election, Chrysler was the sole sponsor of *Newsweek*'s three-issue Road to the White House series. Next year, along with its special postelection edition, *Newsweek* will expand its Road series to four issues; Chrysler is now evaluating whether to renew its commitment for 2004.

Publishers have also begun to prep for next summer's Democratic convention in Boston and New York's Republican convention. While *The New Republic* is expected to do special pre- and postconvention editions, the *National Journal* will go all out. Since 1984, the 10,000-circulation weekly has published a free daily 45-page tabloid newspaper at both conventions (six editions per convention). In 1996, the 20,000-circ tabloid grossed $2 million, thanks to a mix of ads that included UPS and Kraft; General Motors bought the back page of all its editions and will do so again next year.

But in a new twist, *National Journal* will also do a standard magazine-size afternoon edition that will run about 12-16 pages and have a smaller, 8,000-10,000 circ for convention-goers.

Meanwhile, Stephanie Sandberg, *The New Republic* president and publisher, expects to see some improvement in fourth quarter thanks to the weekly's marketing initiatives. In 2000, Sandberg began to bring in new ad pages via a program that includes sponsorship of panel discussions. This year, Sandberg has lined up a slew of sponsors, including the American Gas Association and the Nuclear Institute, as well as the Kingdom of Saudi Arabia. In addition to running 12 ad pages, Saudi Arabia will sponsor four panels starting in mid-October on subjects such as terrorism and U.S.-Saudi relations.

Though lucrative—the Saudi image campaign is said to be a mid-six figure deal—the offer was turned down by some publishers. "It just made me uncomfortable," said *NJ*'s Sullivan. "The notion of doing a panel discussion on the Middle East with Saudi Arabia would be hard to be perceived as balanced."

"I'm a Zionist, born and bred," says *TNR* co-owner and editor in chief Martin Peretz. "[But] Saudi Arabia thought and I thought that this is an audience they want to reach." As for the panels, he promises "there will be a robust debate."

Rick Jones, managing partner of marketing services firm Douglas Jones Group, says the *TNR* sponsorships, and even that of Saudi Arabia, are a good idea. "These days you need to be very creative to come up with advertising ideas," he says. "It's very innovative." —*LG*

Family Affair

FC, Food Net launch TV show

G+J USA Publishing's *Family Circle* and the Food Network have cooked up a new half-hour television show that features quick, easy recipes.

Set to debut Oct. 12 at 11 a.m, *Good Food Fast with Family Circle* will be based on *FC*'s Good Food Fast column of recipes that will first appear in the Oct. 15 issue. Hosting the show will be Ceci Carmichael, formerly host of Food Network's *Calling All Cooks*.

Good Food Fast is the culmination of months of brainstorming between Food Network producers and *Family Circle* editors. "The future is for magazines and all media to expand and have synergy," says Susan Ungaro, *FC* editor in chief. "We've done cook books, a diet book, and I've really wanted to do a television show for a long time. This just made sense."

In demos and reach, the deal was a no-brainer, says Adam Rockmore, Food Net's marketing vp. *FC's* 4.6 million circ targets fortysomething women, which crosses over well with Food Network's 80 million subscribers. "We get marketing exposure in *Family Circle*, and we're able to talk to their reader about a show that's about a brand they love," says Rockmore.

Family Circle is not the only magazine to focus on quick recipes. *Martha Stewart Living's* spinoff *Everyday Food*, which focuses on recipes that use supermarket ingredients, launched this summer and it too now airs as a regular segment on Stewart's syndicated TV show.

Food Network will run tune-in ads in *Family Circle*, as well as three ad pages in the coming year. While Peg Farrell, *Family Circle* senior vp/publisher, is not actively selling cross-media deals, she did note she is in discussions with some food and home-product advertisers that have expressed interest in appearing in both the magazine and on the show, which runs Sundays and repeats Thursdays at 5 p.m.

Media buyers applaud the deal. "We're increasingly interested in trying to connect our products to as many touch points as possible," says George Janson, Mediaedge:cia director of print. "More and more marketers are looking for this type of partnership." —*LG* ■

***FC's* Ungaro (l.) and *Good Food* host Carmichael will serve up quick, easy recipes.**

Mediaweek Magazine Monitor

WEEKLIES September 29, 2003

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek	29-Sep	80.22	30-Sep	71.28	12.54%	2,022.11	2,248.18	-10.06%
The Economist	20-Sep	68.00	21-Sep	46.00	47.83%	1,460.00	1,647.00	-11.35%
Newsweek[E]	29-Sep	51.46	30-Sep	40.88	25.88%	1,393.09	1,340.67	3.91%
The New Republic+	29-Sep	9.82	30-Sep	7.65	28.37%	242.60	282.49	-14.12%
Time[E]	29-Sep	54.49	30-Sep	61.75	-11.76%	1,630.89	1,617.33	0.84%
U.S. News & World Report	29-Sep	31.17	30-Sep	63.96	-51.27%	1,020.65	1,026.69	-0.59%
The Weekly Standard	29-Sep	7.83	30-Sep	10.50	-25.43%	287.33	306.50	-6.25%
Category Total		**302.99**		**302.02**	**0.32%**	**8,056.67**	**8,468.86**	**-4.87%**
SPORTS/ENTERTAINMENT/LEISURE								
AutoWeek	29-Sep	24.29	30-Sep	24.01	1.17%	873.70	875.84	-0.24%
Entertainment Weekly	26-Sep	33.96	27-Sep	37.34	-9.05%	1,308.20	1,305.67	0.19%
Golf World	26-Sep	8.28	27-Sep	24.84	-66.67%	800.37	1,129.88	-29.16%
New York+	29-Sep	64.50	30-Sep	59.90	7.68%	1,679.80	1,853.50	-9.37%
People	29-Sep	51.33	30-Sep	88.98	-42.31%	2,671.16	2,595.66	2.91%
Sporting News	29-Sep	18.17	30-Sep	8.16	122.67%	560.14	550.69	1.72%
Sports Illustrated@	29-Sep	44.10	30-Sep	48.77	-9.58%	1,679.22	1,810.73	-7.26%
The New Yorker[SS]	29-Sep	47.33	30-Sep	76.81	-38.38%	1,505.94	1,490.77	1.02%
Time Out New York	24-Sep	58.31	25-Sep	66.06	-11.73%	2,595.82	2,550.91	1.76%
TV Guide	27-Sep	69.97	28-Sep	87.84	-20.34%	1,796.73	1,747.04	2.84%
Us Weekly+	29-Sep	23.83	30-Sep	23.50	1.40%	922.73	755.49	22.14%
Category Total		**444.07**		**546.21**	**-18.70%**	**16,393.81**	**16,666.18**	**-1.63%**
SUNDAY MAGAZINES								
American Profile	28-Sep	9.30	29-Sep	11.95	-22.18%	344.75	333.13	3.49%
Parade	28-Sep	10.34	29-Sep	10.82	-4.44%	483.58	475.60	1.68%
USA Weekend	28-Sep	15.54	29-Sep	8.39	85.22%	451.89	455.07	-0.70%
Category Total		**35.18**		**31.16**	**12.90%**	**1,280.22**	**1,263.80**	**1.30%**
TOTALS		**782.24**		**879.39**	**-11.05%**	**25,730.70**	**26,398.84**	**-2.53%**

E=estimated page counts; SS=2002 special: Fall Books; +=one more issue in 2003 than in 2002; @=one fewer issue in 2003

BIMONTHLIES September/October 2003

	RATE BASE (1ST HALF '03)	CIRC. (1ST HALF '03)	CURRENT PAGES	PAGES LAST YEAR	PERCENT CHANGE	YEAR TO DATE	YTD LAST YEAR	PERCENT CHANGE
AARP The Magazine[F]	21,500,000[Q]	20,018,227	47.98	102.72	-53.29%	230.11	445.94	-48.40%
American Heritage[O]	340,000	348,080	30.17	48.16	-37.35%	127.77	174.93	-26.96%
American Photo	200,000[Q]	218,555	57.94	39.16	47.96%	248.59	205.91	20.73%
Bride's	None	374,200	532.02	578.02	-7.96%	2,509.31	2,369.61	5.90%
Coastal Living[+/L]	550,000	570,237	208.06	131.54	58.17%	648.70	570.96	13.62%
Country Living Gardener	350,000	371,515	30.10	31.67	-4.96%	133.04	157.56	-15.56%
Departures[7/S]	550,000	683,137[B]	241.65	294.37	-17.91%	611.15	658.97	-7.26%
Dwell[8/L]	150,000	162,982	150.71	54.00	179.09%	482.54	204.79	135.63%
Elle Decor[7]	500,000	511,652	190.36	182.51	4.30%	813.83	767.53	6.03%
Ellegirl[U]	400,000	402,133	88.89	77.33	14.95%	345.23	174.67	97.65%
Fit Pregnancy[O]	500,000[X]	528,214[B]	152.78	125.99	21.26%	592.35	481.41	23.04%
Garden Design	300,000	305,155	25.63	31.96	-19.81%	164.87	176.12	-6.39%
Golf for Women	500,000	507,591	87.75	66.72	31.52%	402.41	328.50	22.50%
Islands[8]	200,000	204,481	68.46	85.67	-20.09%	382.72	412.19	-7.15%
Metropolitan Home	600,000	608,598	150.43	132.70	13.36%	577.79	476.14	21.35%
Midwest Living	850,000	862,074	180.50	153.12	17.88%	775.60	630.82	22.95%
Modern Bride	None	399,650	284.63	266.03	6.99%	1,850.02	2,115.49	-12.55%
Mother Jones	170,000	186,458	42.00	35.00	20.00%	164.87	163.51	0.83%
Muscle & Fitness Hers[8]	250,000	250,253	38.00	53.67	-29.20%	275.70	287.85	-4.22%
Nat'l. Geographic Traveler[8/S]	715,000	820,000[B]	141.89	90.91	56.08%	454.14	325.36	39.58%
OG	300,000	300,681	19.33	20.07	-3.69%	115.01	107.61	6.88%
Old House Journal	None	129,630	82.60	61.17	35.03%	333.80	299.01	11.64%
Organic Style	600,000[Q]	593,508	64.12	51.02	25.68%	242.03	212.88	13.69%
Saveur[8/L]	375,000	377,618	74.54	44.59	67.17%	198.03	222.05	-10.81%
Ski[8/S]	450,000	460,175	311.23	302.24	2.97%	589.67	503.51	17.11%
Skiing[7/S]	400,000	406,440	209.21	224.31	-6.73%	371.35	361.03	2.86%
Spa	None	85,000	62.50	74.16	-15.72%	341.51	373.28	-8.51%
Southern Accents	400,000	401,474	151.20	157.10	-3.76%	519.39	537.52	-3.37%
T&L Golf	625,000	641,164	89.52	90.30	-0.86%	405.92	398.80	1.79%
Teen Vogue[O]	450,000	N.A.[C]	97.84	N.A.	N.A.	405.24	N.A.	N.A.
Traditional Home[8/S]	925,000	925,021	250.22	199.50	25.42%	656.76	588.99	11.51%
Veranda	390,000	400,455	155.72	156.47	-0.48%	558.47	528.54	5.66%
Workbench Magazine	400,000	401,835	39.40	38.25	3.01%	178.47	165.58	7.78%
CATEGORY TOTAL			**4,357.38**	**4,000.42**	**8.92%**	**16,706.39**	**15,427.06**	**8.29%**

Rate base and circulation figures according to the Audit Bureau of Circulations for the first half of 2003 except: B=audited by BPA International, C=not audited and X=did not file the audit by deadline; F=My Generation and Modern Maturity magazines combined as of March/April 2003 issue, former titles' figures combined in 2002; L=September and October separate issues in 2003, combined issue in 2002; O=October/November issue; Q=raised rate base during period; S=September and October separate issues both years; U=quarterly in 2002; 7=published seven times yearly; 8=published eight times yearly; +=published one more issue in 2003 than in 2002

CHARTS COMPILED BY AIMEE DEEKEN

Comedy has arrived on The WB!

The WB Friday Comedies Deliver Across Young Target Demos...

Friday, September 19, 2003 Rank in Time Period

	Teens 12-17	Female Teens	Male Teens	Persons 12-34	Females 12-34
Reba	#1	#1	#1	#1	#1
Like Family	#1	#1	#1	#2	#2
Grounded For Life	#1	#1	#1	#2	#1
All About The Andersons	#1	#1	#1	#3	#2

Source: Nielsen Media Research, NTI data AA% - Friday, September 19, 2003. Rank in time period versus ABC, CBS, NBC, FOX, UPN & PAX
Galaxy Explorer. Includes preliminary data. Subject to qualifications upon request.

...Plus, The WB Comedy Premieres Score Impressive Growth!

Thursday		Friday	
8:00-9:00pm		8:00-9:00pm	
Steve Harvey's Big Time	JKX	Reba	Like Family
+15% [Adults 18-34]	+31% [Adults 18-34]	+13% [Women 18-34]	+27% [Women 18-34]
9:00-10:00pm		9:00-10:00pm	
What I Like About You	Run Of The House	Grounded For Life	All About The Andersons
+33% [Women 18-34]	+40% [Women 18-34]	+22% [Adults 18-34]	+27% [Adults 18-34]

Source: Nielsen Media Research, NTI data AA% - 2003-2004 Season Premiere Telecast vs. year-ago time period premieres.
Galaxy Explorer. Includes preliminary data. Subject to qualifications upon request.

Before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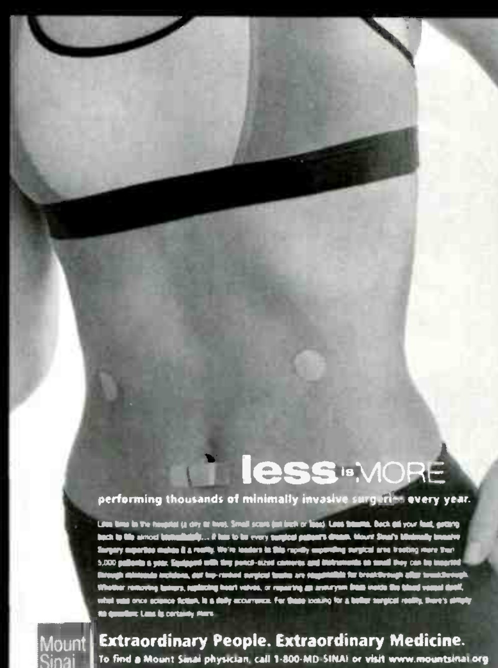
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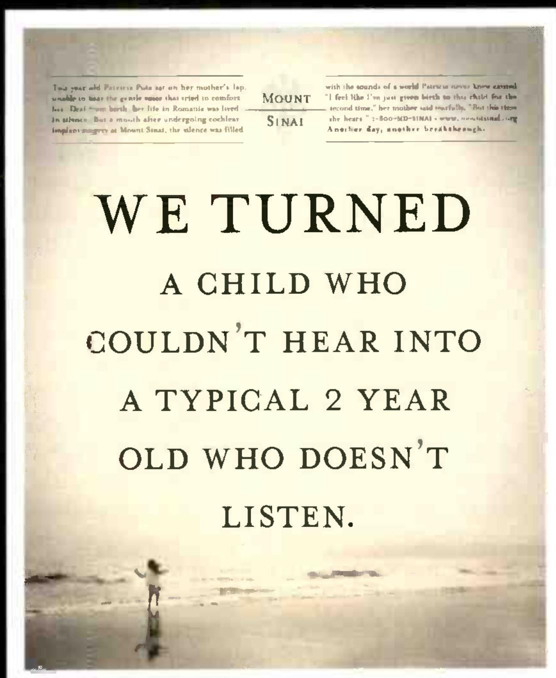

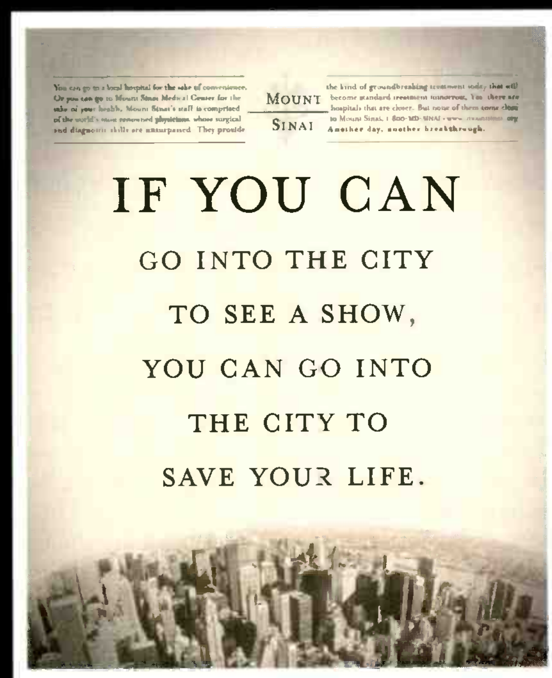

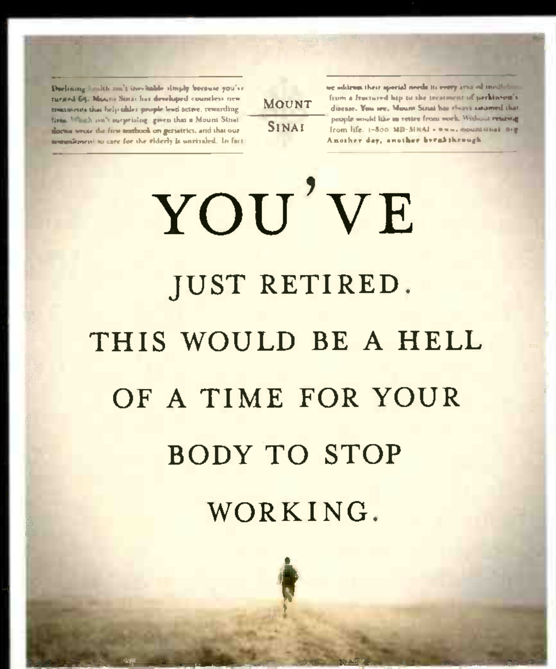

DEVITO/VERDI

media person

BY LEWIS GROSSBERGER

The Curse of the Curse

ACCORDING TO A NEW STUDY BY THE PARENTS TELEVISION COUNCIL, WHATEVER THAT IS, we are suddenly hearing far more nasty language on prime-time television—profanity, obscene epithets, lewd sexual terms and even dirty words. Media Person would like to say right up front that he's pretty pissed off about it.

Even in the so-called family hour, 8 p.m. to 9 p.m., the air is nearly twice as blue as it was just three or four years ago. Apparently, the network's beleaguered censors finally threw up their hands in despair and just said, darn it, the heck with it all.

It may seem unfair but Media Person has always felt that while it's perfectly OK for him to say bad words, he really finds it offensive when other people use them. It comes across as vulgar and tasteless, and frankly it makes you all sound like a bunch of low-class scumbags.

Many observers, particularly conservative ones, believe that the media are a bad influence. They say that hearing fetid verbiage spew from the pie holes of TV and movie actors will cause the populace, especially our impressionable youth, to speak likewise. After that, it's just a short step to navel piercing.

In fact, the very opposite is the case. It is the public, with its increasingly indiscriminate potty-mouthing, that has brought television's vocabulary down to its own gutter level. You can't even walk down the street anymore without hearing some purple-haired granny or tattooed pre-teen voicing vernacular that would have gotten them dangled from a gibbet a scant century or two back. When Tony Soprano, Andy Sipowicz or Dan Rather let loose one of their trademark colorful obscenities, they're just trying to make themselves understood by hoi polloi [note rare correct use of the term].

Media Person says the way the public has let television down is a national disgrace. While MP is not in favor of censoring the American people, surely there should be some kind of self-policing mechanism instituted. Perhaps it's as simple as taking individual responsibility. If, whenever you heard someone curse, you said in a firm manner, "Stop that this instant," and then washed out their mouth with soap, the alarming pace of linguistic degradation could be significantly decelerated.

When Media Person was a boy, hard as it may be for you younger readers to believe, the public was highly repressed, due to having been deprived of self-help materials. Before daring to utter even so mild an oath as "great Caesar's ghost" or "Fie on you, sir or madam, as the case may be!" the public would peer about to make sure no lady, child or young animal was within earshot.

> **It was a gentler time. Euphemism ruled. Comic-strip artists indicated profane dialogue by writing the phrase "#$%^&~*!"**

It was a gentler time. Euphemism ruled. Comic-strip artists indicated profane dialogue by writing the phrase "@!#$%^&~*!" (MP isn't sure of the spelling). Striking teamsters would shout, "Doggone son of a gun!" at scabs, and steelworkers would proclaim "drat!" when they caught a rotten rivet in their buckets. The British were even more repressed. To give you some idea, they managed to convince themselves that "bloody" was a shocking and blasphemous word. After being punched by an opponent in Parliament, a famous British prime minister once said, "Good heavens, sir, you've given me a reddened proboscis."

Because the average person euphemized, so did the ever-impressionable media. It wasn't until the turbulent '80s that things went downhill. Some historians blame the obscenity upsurge on Wall Street bond traders who could not control themselves and gave vent to base emotions during the fabled orgies of buying and selling that took place in the financial boom of that era. Others cite the revelations that President Richard M. Nixon had habitually filled the Oval Office with extra-constitutional expletives.

Such trash talk at formerly rarefied levels was bound to filter down to ordinary Americans and thence to the TV cop shows, where actors portraying police officers must call actors portraying crime suspects harsh names in order to make them break down and confess, much as in real life. At first, they utilized creative near-obscenities. "Talk, you mother-clutching hairbag," a detective on *Hill Street Blues*, a popular show of the time, would intone menacingly, "or I'll pulp your bleachin' coccyx."

Today's TV cops speak in nothing but Anglo-Saxon four-letter words (usually while removing their trousers) except for the ones on *Law and Order*, who mysteriously behave the same now as they did in the show's debut on September 16, 1962. As someone who has kept a bleary eye on these matters for many decades, Media Person knows that if nothing is done, the next step will be allowing Ted Koppel and Jim Lehrer to say "fuck," which both of them, by the way, have always wanted to do.

All Media Person can say is thank heaven for newspapers and magazines, which still don't stand for such offensive words being printed. ■

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Standing (l to r): Pamela Wong, SVP/Group Media Director (FCB), mother of 2; Eve Leshaw, Group Director Of Media Strategy (OMD), mother of 1; Jan Weinstein, SVP/Group Media Director (FCB), mother of 2. Seated: Susan Savoie, VP/Cosmed Marketing (Beiersdorf), mother of 2.

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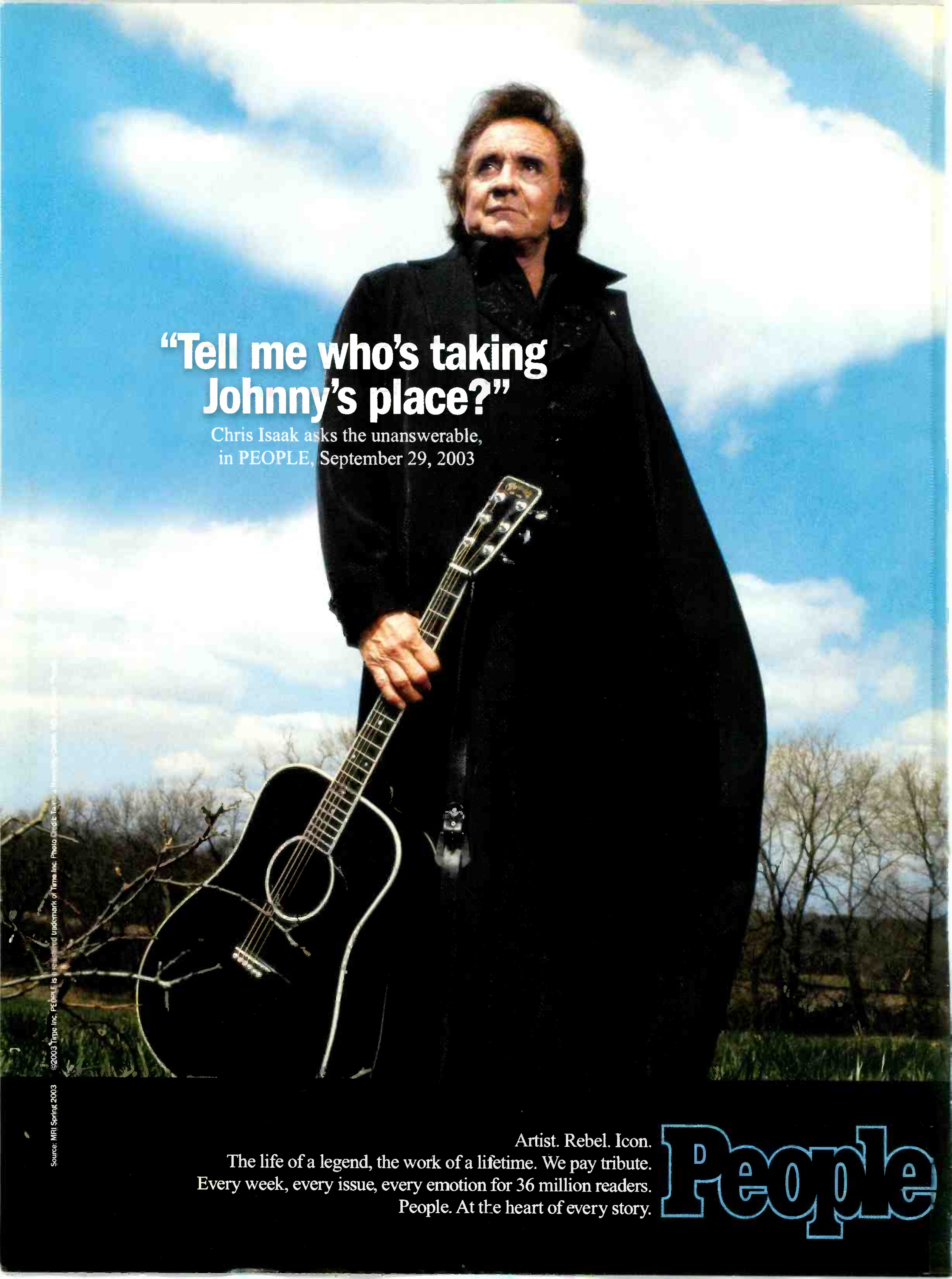
"Tell me who's taking Johnny's place?"
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