

MEDIAWEEK

VOL. 12 NO. 33

THE NEWS MAGAZINE OF THE MEDIA

SEPTEMBER 16, 2002 \$3.95

Network Scatter Oversold

Scant 4th-Qtr. prime-time avails force advertisers to buy football, baseball **PAGE 4**

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SYNDICATION

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fall TV report

NOW THAT THE BROADCAST NETWORKS ARE SCHEDULING MUCH OF THEIR MARQUEE PROGRAMMING IN THE 10 P.M. HOUR,



CABLE NETS ARE ROLLING OUT SOME SERIOUSLY ODDBALL REALITY PROJECTS



SPECIAL SECTION BEGINS ON PAGE 24

FROM TOP: DAVID CARUSO IN CBS' CSI: MIAMI; E!'S MICHAEL ESSANY PROJECT

MARKET INDICATORS

NATIONAL TV: ROBUST
Prime time is so tight that some nets are asking advertisers to take back money committed in the upfront. Other nets are making advertisers buy other day-parts to get fourth-quarter prime scatter.

NET CABLE: STEADY
The impact of a war with Iraq on the ad market was being mulled after Bush's U.N. address last week. Active fourth-quarter spenders remain telecom, movies and autos.

SPOT TV: BUSY
Fourth quarter tight with auto still leading the way. Retail, financial and entertainment continue to spend through October as telecom also picks up the pace.

RADIO: ACTIVE
Inventory is tight in markets such as Philadelphia, Dallas, and Sacramento, Calif. November driven by autos, entertainment, financial and telecom.

MAGAZINES: WARM
Publishers of women's lifestyle books say their upcoming winter issues are filling with buys from apparel and accessories as well as home furnishings and supplies ad categories.

CSI/MIAMI: INGRAM BARRIS/CBS; ESSANY: E! ENTERTAINMENT

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Source: Nielsen Media Research, August 02 (7/29/02-8/25/02), P2+ AA(000), Mon-Sun 6am-6am, FNC vs. CNBC, CNN, HLN and MSNBC. Subject to qualifications, which will be made available upon request.
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At Deadline

■ MORE TALK OF O'DONNELL'S ROSIE EXIT

G+J USA executives last week met to discuss the growing speculation that Rosie O'Donnell is on the verge of pulling out of *Rosie* magazine, the joint venture published by G+J and O'Donnell. Since July, there has been a heated battle for editorial control; contractually, G+J has final say. The source of the speculation is said to be editor at large Heidi Safer (the step-sister of O'Donnell's partner), who told some staffers O'Donnell was set to walk, according to sources familiar with the situation. "We've heard these rumors, and we did have a meeting to discuss these rumors," said a G+J representative, who declined further comment. Safer's office referred calls to Cindi Berger, O'Donnell's publicist. "It's not true," said Berger of O'Donnell's alleged plans. "I don't know if someone is trying to fan a fire... Both sides are still trying to solve the problems."

■ DOJ TO SCRUTINIZE HBC DEAL

The Department of Justice's antitrust division requested additional information from Univision Communications and Hispanic Broadcasting Corp. regarding Univision's \$3.5 billion agreement in June to buy HBC. Both said they would comply with the DOJ request. The deal would combine the top Spanish-language TV company with the No. 1 Hispanic radio group. HBC's main rival, Spanish Broadcasting System, had filed a legal complaint against HBC and Clear Channel Communications, which owns 26 percent of the radio group, alleging that both companies engaged in unlawful and anti-competitive practices.

■ CBS' CLAYSON ON THE OUTS?

CBS is reportedly set to replace Jane Clayson as co-host of *The Early Show*. Clayson joined the morning news program in November 1999, paired at the time with Bryant Gumbel. Gumbel left the show when his contract expired in May. CBS may also be eyeing former *CBS This Morning* host Harry Smith to co-anchor *The Early Show*, which trails in ratings behind both NBC's *Today* and ABC's *Good Morning America*.

■ SENATE BILL TO ASSIGN SPECTRUM

A bill introduced by U.S. Sen. Mary Landrieu (D-La.) would compel the government to assign rather than auction spectrum that could support a new television service. Northpoint Technology Ltd. and rivals want to beam programming and other services from terrestrial antennae, using the same spectrum as direct-broadcast satellites. Landrieu said the auction planned by the Federal Communications Commission would delay the new ser-

vices. Critics say Landrieu's measure introduced last week would unfairly reward Northpoint. The company says it invented the new technology, and its application for spectrum deserves action. Rivals support a competitive auction.

■ RADIO ONE TO GO DIGITAL BY YEAR END

Radio One, the largest radio group to target African Americans, last week became the first radio group to commit to going digital. By year end, the broadcaster, which owns 65 radio stations, will adopt HD Radio technology developed by iBiquity Digital Corp. for KKBT-FM in Los Angeles, KBFB-FM in Dallas, WBOT-FM in Boston, WDMK-FM in Detroit and WHTA-FM in Atlanta. In related news, the National Radio Systems Committee, a joint committee of the National Association of Broadcasters and the Consumer Electronics Association, began the process of setting technical standards for AM and FM digital broadcasts.

■ **ADDENDA:** Julie McNamara, most recently executive director of drama series at ABC Entertainment, was promoted last week to vp/drama programming... *Parade* president Jack Griffin was promoted to publisher; the title had previously belonged to Walter Anderson, the magazine's chairman/CEO... Gary Fries, Radio Advertising Bureau president, told attendees at the National Association of Broadcasters show in Seattle late last week that 2002 radio ad spending would rise 5 percent to 6 percent over 2001... ESPN will telecast its first-ever scripted, dramatic series in 2003. The show will be a weekly, one-hour, sports-themed program produced by ESPN Original Entertainment and will run for 10 weeks on Tuesday nights... The Sept. 12 premiere of WB comedy *Family Affair* drew a 2.9 rating/5 share in households, performing best in Chicago (15 share), Orlando (14 share) and New York (11 share).

■ **CORRECTIONS:** The New York Market Profile in the Sept. 9 issue incorrectly reported the New York *Daily News*' ownership. Mortimer Zuckerman and Fred Drasner have owned the paper since 1993. Also, in the Aug. 12 Market Profile on Louisville, Ky., information supplied by Nielsen

Media Research omitted WB affiliate WBKI-TV from a ratings chart. In the May sweeps, WBKI finished fourth in the market at 5 p.m. with an average 2.8 rating/6 share in households; the station ranked fourth at 5:30 p.m. with a 2.8/6 and fourth at 6 p.m. with a 3.5/7. At 10 and 10:30 p.m., WBKI finished sixth with a 1.4/2 and a 1.5/2, respectively. At 11 p.m., WBKI finished fifth with a 1.0/2.

INSIDE MEDIWEEK



ABC/ESPN Sports' Erhardt says there's been no "bait and switch" at MNF Page 4

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MEDIWEEK (ISSN 0155-176X, USPS 885-580) is published 46 times a year. Regular issues are published weekly except 7/8, 7/22, 8/5, 8/26, 12/23 and 12/30 by VNU Business Publications USA., 770 Broadway, New York, NY 10003. Subscriptions are \$149 one year, \$249 two years. Canadian subscriptions are \$342 per year. All other foreign subscriptions are \$319 (using air mail). Registered as a newspaper at the British Post Office. Canadian Post Publication Agreement Number 1430238. Periodicals postage paid at New York, NY, and additional mailing offices. Subscriber Service (1-800) 722-6658. MEDIWEEK, 770 Broadway, New York, NY, 10003. Editorial: New York, (646) 654-5250; Los Angeles, (323) 525-2270; Chicago, (312) 583-5500. Sales: (646) 654-5125. Classified: (1-800) 7-ADWEEK. POSTMASTER: Send address changes to MEDIWEEK, P.O. Box 1976, Danbury, CT, 06813-1976. If you do not wish to receive promotional material from mailers other than ADWEEK Magazines, please call (800) 722-6658. Copyright 2002, VNU Business Media, Inc. No part of this publication may be reproduced, stored in any retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of the publisher. Reprints (651) 582-3800.

Agency Owners Pull Plug on MediaPort EDI Venture

MediaPort, the New York-based company formed in April 2001 to create an Internet-based media management system for buyers and sellers, shut down last week. Michael Lotito, CEO of MediaPort, and a small staff were laid off.

The company was equally funded by the three largest advertising-agency holding companies that are responsible for placing about 65 percent of all media ad dollars—WPP Group, Omnicom and the Interpublic Group of Companies. The \$45 million investment failed to produce a revenue-producing system.

Sources say before MediaPort folded, its owners had been in discussions to buy Donovan Data Systems, an established provider of media-management software to many of the top ad agencies. That deal could still materialize.

Before leaving, Lotito, the former president/COO of IPG's Initiative Media, was instrumental in convincing media trade groups to develop open technical standards for electronic data interchange (EDI), the first step in developing a comprehensive online advertising exchange. "They got a lot of people to sit up and pay attention," said Abby Auerbach, executive vp of the Television Bureau of Advertising. The TVB unveiled its standards in July. Last week, the Radio Advertising Bureau announced its standards, which will allow for the electronic exchange of avails requests, submissions, orders, offers, invoicing, discrepancy reports and broadcast instructions.

With MediaPort gone, the Association of American Advertising Agencies has taken over the mission of convincing the technology and software providers to incorporate into their services the standards adopted by the media groups. —*Katy Bachman*

Fox Affiliates Join Fight Over Network Restrictions

Unhappy TV affiliates got a small boost last week in their bid to change network business practices. Fox affiliates, which have been on the (continued on page 6)

Prime-Time Scatter Squeezed to Limit

Having oversold upfront, nets face inventory shortage if makegoods needed

THE MARKETPLACE By John Consoli

The broadcast prime-time marketplace is so close to complete sellout for the entire 2002-2003 season that network sales executives in some cases are encouraging advertisers to take back some upfront dollar commitments, a rare move when the overall economy is at such a standstill. The tightness has driven fourth-quarter scatter pricing up to 20 percent over upfront rates.

While the broadcast networks have publicly said they sold between 82 percent and 85 percent of ad inventory for the 2002-'03 season in the upfront, a few of them have actually broken the 90-percent level, said several media buyers last week. That leaves little inventory for makegoods in case of ratings shortfalls, and only a small chunk of ad time to sell at even higher scatter prices if some of their shows really take off.

The tight avail situation is forcing advertisers who didn't participate in the upfront and want to buy scatter time, or who want to get more ad dollars placed beyond their upfront commitments, to spend those dollars in other dayparts, including early morning, evening news, late night and sports.

Media buyers said prime time has so few avails for fourth quarter—the least sold-out quarter of the season between late September and May—that CBS and Fox in some cases are selling scatter spots only if advertisers buy a comparable number of ads in National Football League or Major League Baseball games. Some advertisers are taking up the offers.

All pro sports sales are pacing at a much higher sell-out rate than at this time last year. Fox's NFL inventory is nearly sold out, with a only a few spots left in late December and the postseason. Fox has also sold about 75 percent of its postseason baseball telecasts (including

prime-time airings), with the biggest number of avails left in the "if necessary" playoff and World Series games.

One network sales executive, who declined to speak for attribution, said the last time he recalls the networks being in such a tight inventory position going into a new season was late summer 1995. "It's hard to understand how the economy is flat, at best, and advertisers in our little world of network TV are plac-



World Series champions the Diamondbacks needed their "if necessary" games to win, which is all the inventory left this year.

ing ad dollars down like gangbusters," the sales exec said. "There is no daypart that is really soft, with the exception of maybe daytime, and cancellation options are being exercised at record low levels."

The movie category provides a good example of advertisers' need for flexibility in buying network time, agreed network sales execs. Traditionally huge prime-time advertisers, movies are placing the additional dollars they can't express in prime in the early morning daypart.

Media buyers noted that even NBC—which cannot shift advertisers into NFL, NBA or baseball inventory—is asking advertisers to commit dollars to sibling TV outlets MSNBC, CNBC and Telemundo, or even its arena football inventory if they want scatter time on any of its top-rated prime-time shows.

Will this unusually taut situation come back to haunt the networks if they get into heavy makegood situations? Very possibly. Buyers believe the network sales departments underestimated advertiser demand going into the upfront in May and oversold. The nets also assumed that advertisers would exercise cancellation options at greater levels than they have.

On the advertiser side, media buyers said their clients are worried that if ratings this season tank at more than one network—as happened last season—and makegoods tighten inventory, ad prices could skyrocket for those not locked into upfront deals. Also, many advertisers had so much money they wanted to get down in prime time during the upfront but could not place, they opted for Sunday football as an alternative (Fox and CBS Sunday NFL games draw higher ratings than a good number of prime-time shows). Lastly, fears of a baseball strike, which turned out to be unfounded, had also driven more business into NFL telecasts.

“We had a client who decided in late August that it wanted to run in prime time this season, and both CBS and Fox told us for every dollar we wanted to spend in prime time, we had to spend the same amount in football,” one media buyer said.

According to buyers, NFL 30-second spots on CBS are selling for \$190,000 while Fox is getting \$210,000. ABC’s *Monday Night Football* is also sold out into December at about \$325,000 per :30, but Ed Erhardt, president of ABC/ESPN sports customer marketing and sales, said ABC has not done a “bait and switch” to get more advertisers in *MNF*. “It’s been a pure sell,” he said. “For the most part, we don’t package it with other ABC prime time.”

Spots on Super Bowl XXXVII, which airs on ABC Jan. 26, 2003, is close to 90 percent sold, far ahead of last year’s level at this point, and the most recent deals have been done at prices as high as \$2.4 million per :30.

Jon Nesvig, president of sales at Fox, would not comment on buyer claims that the network was driving wannabe prime-time advertisers into sports programming, but said twice the amount of inventory for Fox NFL telecasts was sold in this year’s upfront than last year. And Nesvig said a tight prime time naturally drives advertisers to other dayparts. “All dayparts are interdependent on one another,” he said.

Mike Shaw, ABC sales president, said that unlike other networks, his network still had 15 percent of its prime-time avails left going into the season. “The other networks may have had higher sell-out levels, but we kept it at about 85 percent to 86 percent going into the season,” said Shaw. “We do not want to run into the problems we had last season when we were out of the scatter business.” ■

Nielsen ‘Updates’ Season

Some networks are upset new 2001-'02 audience estimates aren't official

RESEARCH By John Consoli

Nielsen Media Research last week released its “updated” audience universe estimates for the 2001-2002 season based on additional information provided by the Census Bureau from the 2000 Census. But the ratings company stressed that the new estimates do not replace the data originally used to determine audience levels for the season.

Nielsen’s decision not to revise its original estimates means there is no official recourse for media buyers to claim that broadcast or cable networks over- or underdelivered this season, which officially ends Sept. 22. Any adjustments made on the updated numbers must be based on informal agreements between the networks and buyers.

The updated estimates show that the kids 2-11, adults 25-49 and adults 50-plus audience estimates for the 2001-2002 season were lower than Nielsen’s original estimates, meaning the networks underdelivered those demographic segments to advertisers. If Nielsen had revised the original numbers, advertisers could have gone back to networks with kids programming for makegoods when applicable. Conversely, the updated estimates show that the teens 12-17 and adults 18-24 demo groups had more people than in the original estimates, meaning the networks overdelivered audience to advertisers.

Nielsen’s decision not to revise the numbers was cheered by some and panned by others in the TV business.

Steve Sternberg, senior vp/audience analysis at Magna Global USA, said Nielsen did the right thing in not revising the official numbers. “Where would it end?” asked Sternberg. “If they did it, then should they go back and also revise 2000-2001? They produced the original numbers with the best information they had at the time. We should just move on.”

But Lyle Schwartz, vp of research for Mediaedge:cia, said once he analyzes the updated numbers, his agency will probably consult with clients that were affected to see whether they want to retroactively negotiate with any networks.

Jed Petrick, president of the WB, criticized Nielsen for declining to make the new estimates official. Using the updated estimates,

the WB has both under- and overdelivered its audience in the '01-'02 season.

“As an industry, we pay Nielsen to provide the most accurate data possible, and have based our multibillion-dollar businesses on this accuracy,” Petrick said. “I find it incredibly ironic that now, after years of constant criticism for its supposed inability to accurately reflect the

A NEW UNIVERSE FOR 2001-'02

DEMO GROUP	UPDATED ESTIMATES*	ORIGINAL ESTIMATES*	PERCENT DIFFERENCE
2-11	39,950	40,730	-1.9%
12-17	24,630	23,520	4.7%
18-24	26,650	25,000	6.6%
25-49	101,720	102,240	-0.5%
50-plus	77,110	78,390	-1.6%

* In thousands. Source: Nielsen Media Research

number of viewers who are exposed to our programs and the commercials that pay for them, Nielsen has the chance to stand behind more accurate, updated information for our entire industry, and it flat out won’t do it. Calling these numbers updated instead of making them official is worthless.”

Another network executive, who declined to speak for attribution, sided with Petrick. “To just release these figures and let the networks and advertisers fight over how to rectify the situation is irresponsible,” said the executive, “when we write business based on audience guarantees and are obliged to give makegoods for underdelivery that may not longer have had to be given.”

Anne Elliot, vp/communications for Nielsen, said the ratings company—which is owned by *Mediaweek* parent VNU USA—has no plans to go back and change the 2001-2002 estimates. “No matter what we do, we will not be able to make every one of our clients happy,” she said.

But Elliot defended Nielsen from criticism that the data-measurement service was trying to cover up or delay releasing the updated estimates. “The complete census data got to us later than usual. On April 4, we sent all clients a notice that new census data would be coming into us, and in May we sent out another notice that we would be sending out updated estimates,” explained Elliot. “But we were pressed to get out the initial audience estimates for the 2002-2003 season so we wouldn’t impede the upfront.” ■

sidelines in the debate over networks' ownership limits of TV stations, told the Federal Communications Commission in a Sept. 10 letter that they share concerns raised by the Network Affiliated Stations Alliance. The group represents more than 600 ABC, CBS and NBC affiliates. It complained to the FCC last year that affiliation agreements unfairly restrict its members from pre-empting network programming.

FCC Chairman Michael Powell said last week the agency's four commissioners have been unable to reach consensus on NASA's petition. There is a 2-to-2 deadlock—one that may not change until the vacant seat for the FCC's fifth commissioner is filled. So far, that nomination has been stalled in the Senate, weighed down by unrelated disputes. —*Todd Shields*

Us Weekly to Hike Circ and Publishing Frequency in '03

Us Weekly in January will raise its circulation guaranteed to advertisers by 100,000 to 1.05 million in January, and will also increase its publishing frequency by six issues to 46.

Two years ago, the celebrity magazine, published jointly by Wenner Media and the Walt Disney Co., slashed its rate base to 800,000 from 1 million. Last year, Wenner also scaled back *Us*' frequency from 43 issues to 40. The magazine has since picked up momentum following the hire last March of *Glamour* vet Bonnie Fuller as editor in chief. Paid circ through June grew 16 percent to 1,065,589 over the year prior, according to the Audit Bureau of Circulations.

Separately, *Us Weekly* this week will publish three special editions for New York's Fashion Week on the 18th, 19th, and 21st. Some 10,000 copies of *Us Weekly Fashion Week Daily* will be distributed at various venues. Each issue will run eight pages, including two ads. Brandusa Niro of Fashion Wire Daily will spearhead the specials. "*Us* is making a name in covering celebrity events, and Fashion Week is a huge celebrity event," says Fuller. "It's also a way to strengthen interest in the weekly." The specials will cover Fashion Week's events, parties and scoops. —*Lisa Granatstein*

Ownership Exam Begins

Advertisers join host of media players monitoring FCC's proceedings

WASHINGTON By Todd Shields

As the Federal Communications Commission last week formally started to re-examine its rules that limit ownership of TV and radio stations, members of the advertising community said they will continue to monitor the proceedings on behalf of their clients.

And while no one expects the health of the advertising market to guide federal regulators, ad execs had begun to exchange information on the issue with regulators during an FCC-called meeting back in June, said Dick O'Brien, director of the Washington office for the American Association of Advertising Agencies.

"If the consolidation of media continues, it probably would not be good for our clients [who might have to pay more for ads and have less programming to choose from]," said O'Brien, who is not alone in his concerns.

Those jockeying for FCC attention on the ownership issues include congressional Democrats skeptical of further media concentration and activists fearful a handful of owners will emerge as gatekeepers to public debate. Others apprehensive of further consolidation include network affiliates, who want the FCC to defend limits on the size of TV networks.

The ownership examination, which will run at least through next spring, could loosen or sweep away regulations that keep TV networks from growing indefinitely, that bar major networks from buying one another and that keep newspapers from buying broadcast stations in one market. The FCC says it is reviewing the rules in part because federal courts say it must, but also because many of the rules predate major growth in cable and satellite distribution.

One rule facing possible change is the cap

that limits networks to owning stations that reach 35 percent of the national TV audience. "I don't think the national ownership cap will be completely eliminated," but it likely will be relaxed, said Bear Stearns analyst Victor Miller. Miller also said the rule barring joint ownership of a daily newspaper and a nearby broadcast station likely will be weakened.

Indeed, FCC commissioner Kevin Martin suggested that newspapers be allowed to buy stations in large cities with many media voices.

"While there may be disagreement on what steps the commission should take in smaller markets, I believe there is less disagreement regarding whether some change might be appropriate in the largest markets," said Martin, whose suggestion illustrated the freewheeling nature of the emerging debate. FCC chairman Michael Powell said the agency had "failed to tailor and adapt rules to the realities of the marketplace." Many in executive suites agree. CBS and UPN owner Viacom, for instance, issued a statement welcoming the FCC action.

The mammoth undertaking could generate some surprises. For instance, although federal courts earlier this year eliminated a rule barring broadcasters from buying local cable systems, restrictions on the practice could find their way into the new rules. ■



Martin mulls changes for large markets.

AOL Recasts Management

Former *EW* publisher Michael Kelly tapped as global marketing president

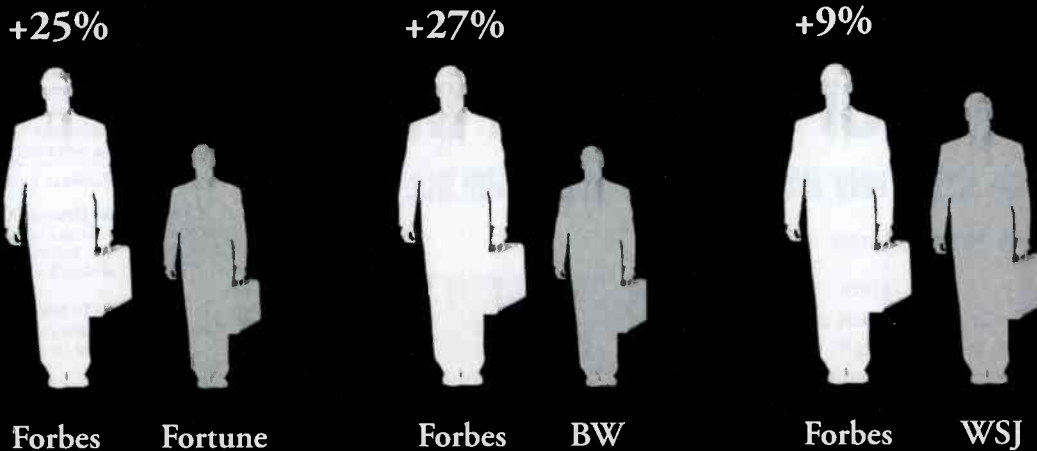
THE INTERNET By Cathy Taylor

America Online may have shuttered its troubled business affairs unit last week as part of a restructuring, but the closure of the deal-making group does not mark the end of AOL Time Warner's pursuit of cross-platform deals.

In a week filled with AOL press releases,

the flurry ended with news that Michael Kelly, former publisher of *Entertainment Weekly*, had been hired as president/global marketing solutions, AOL's key cross-platform post. Kelly replaces Myer Berlow, who quietly stepped down earlier this year. "There is such a huge opportunity in integrated marketing pack-

Numbers don't lie.
Well, *these* numbers don't lie.



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ages," Kelly said. "The advertisers want it."

Kelly is not to be confused with J. Michael Kelly, who as part of the restructuring was removed from the now-extinct post of COO to become chairman/CEO of AOL International. Recently named AOL chairman/CEO Jonathan Miller also abolished the president's job last week, which had been held by James de Castro, who now becomes part of a new Senior Strategy Group. That group also includes Joseph Ripp, now vice chair of the AOL unit; key corporate executive Don Logan; and long-time AOL executive Ted Leonsis, who long before the merger had spearheaded AOL's first forays into creating original content.

The restructuring is a return to that proprietary content ideal, in part because AOL wants to heighten the desirability of its AOL Broadband service. "That is where AOL needs to move," said Carl Fremont, senior

vp/channel and partnership solutions at Digi-tas. "Consumers don't have a reason anymore to subscribe."

The restructuring also puts renewed emphasis on interactive marketing. With the president and COO posts gone, Robert Sherman, president/interactive marketing, now reports directly to Miller. Sherman said the new structure will help "collapse the time" it will take AOL to get on track as an ad property. (AOL last week lowered full-year projections for ad/commerce revenue for the online unit to \$1.7 billion from an earlier projection.)

Sherman added that a number of key company execs had pushed for the hiring of Kelly, who has relationships with many of them. "He is a bright, solid citizen who understands the advertising business cold," he said, adding Kelly could get rid of "the historic, internecine squabbling" that has long hampered AOL. ■

Fall Premieres Faltering

Of six new first-run strips, only *Wayne Brady* is on par with Oct. '01

SYNDICATION By Marc Berman

Although judging a new show by metered-market ratings is just part of a proper evaluation, early overnight results look only partially promising for Buena Vista's *Wayne Brady Show*, and downright dismal for five other syndicated strips.

Using the lead-in and year-ago time period averages as benchmarks (October 2001 replaces the pre-emption driven September 2001), only *Wayne Brady* is maintaining year-ago time-period ratings levels. All six of the new strips to date are down from their lead-in average. According to Nielsen Media Research, *Wayne Brady*, after nine days in 21 markets, is leading the pack of new shows with a 2.4 rating/8 share in households, 4 percent above the year-ago time period (2.3/7), but down 29 percent from its lead-in average (3.4/11).

Although clearances in 52 metered markets will give Warner Bros.' *The Caroline Rhea Show* an advantage nationally, a 1.3/4 versus a 1.7/5 for both the lead-in and year-ago time period averages is nothing to boast about. Neither is a 1.1/4 after nine days for Warner Bros.' reality magazine *Celebrity Justice*, which in 53 markets is off 21 percent from its lead-in (1.4/4). The better news for *Celebrity Justice* is a less steep 8 percent falloff compared to the year-ago average (1.2/4).

Of the trio of strips that premiered on Sept. 9, NBC Enterprises' *John Walsh Show*, which is in 51 markets, is showing the most



WARNER BROS.
Caroline Rhea, with guest Matthew Perry, is a syndie premiere without an early ratings pop.

signs of life, with a 1.5/5 out of a 1.9/6 lead-in (off 21 percent) and a 1.8/6 in the year-ago time period (off 17 percent). More disappointing is Paramount reality/news-magazine *Life Moments* (1.2/4 out of a 1.5/5 in both benchmarks) and a minuscule 0.4/1 for the limited launch of Telco Productions' *We the Jury* in 13 markets. The new court strip is off 43 percent from the lead-in (0.7/2) and 50 percent from the October 2001 average (0.8/2).

"What's alarming is that with all the advance promotion, particularly for shows like *John Walsh* and *Caroline Rhea*, there was no ratings pop in the first day or two," said Bob Jacobs, president of TV distributor ECM. "You would think the initial curiosity factor would have at least sparked the numbers in the first few days." ■

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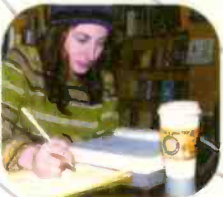
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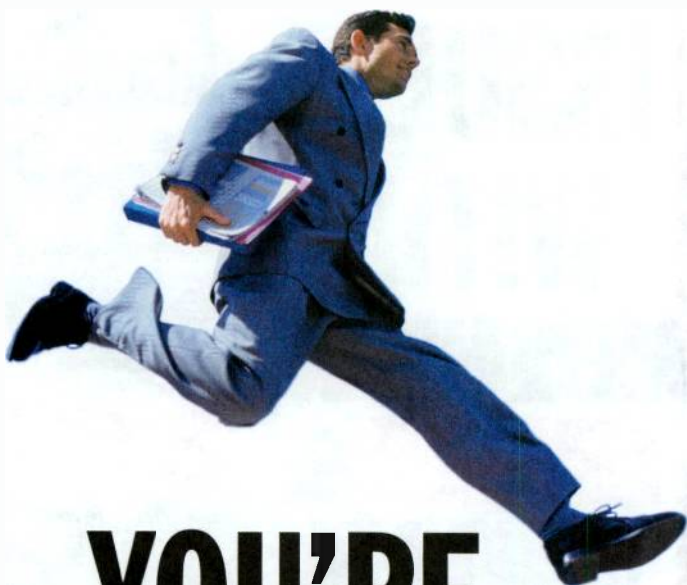
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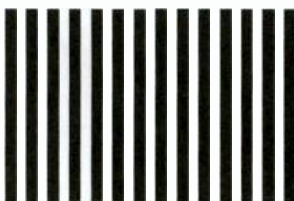
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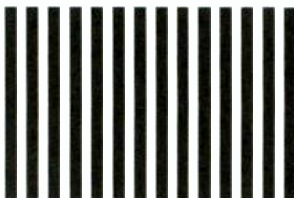
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JACKSONVILLE, FLA. TV STATIONS

Viewers Finding CBS' New Home on WTEV

BY SANDY BROWN

CBS Television Group's Jacksonville, Fla., affiliate switch appears to have not resulted in any serious ratings damage for the network. In fact, the move off longtime affiliate Post-Newsweek's WJXT has, in some cases, seen the network's numbers improve.

When WJXT walked away from its affiliation with CBS on July 10 after refusing to accept a new compensation package for pre-emptions and network programming, it marked the end of a 53-year-old relationship. The defection has since allowed CBS' new

Generally, on a weekly basis we are outperforming CBS' national numbers." The station has seen its revenue jump about 190 percent in the third quarter over the same period last year, according to McGraw.

CBS' strong sports programming is clearly behind those rapidly improving ratings. The market's highly popular Jacksonville Jaguars NFL franchise, playing in its first home game this season against the Indianapolis Colts on Sunday, Sept. 8, drew a 28.6 rating and 50 share, with a persons-using-television (PUT) level of 57.5. The Jaguars' season opener on WJXT last year against the Pittsburgh Steelers produced a 33.8/55, but with a PUT of 61.4. While the rating for last year's Pittsburgh game was higher, sources in the market point out that Indianapolis just doesn't have the same national draw enjoyed by the Steelers.

The Jaguars franchise, for its part, has shared a long-term relationship with WJXT, which is why the station will continue to enjoy status as the team's official TV outlet.

A representative at the station admitted that it is in a difficult position when it comes to having everything but the rights

to regular-season Jaguars games. It still has the rights to preseason games and also airs its own original Jaguar-related programming, like *The End Zone*, a Monday-night talk show dedicated to the team.

In other CBS sports events, WTEV had the third-highest CBS ratings for the men's final of the US Open tennis championship on Sept. 8. It was also the highest-rated CBS station in the nation for the University of Florida-Miami Hurricanes NCAA football game on Sept. 7, with a 25.3/40 share, even beating

the ratings in the much larger Miami market.

"As far as CBS is concerned, it has been one of the most successful transitions it has experienced. CBS is coming out of this with virtually the same ratings situation that it came in with," said WTEV Director of Sales Jerry Hoffman.

As for news, CBS' network coverage of the Sept. 11 anniversary ceremonies last week helped WTEV pull a 9.4/14 over WJXT's 2.8/4 for the night. WJXT produced its 9/11 coverage in-house, sending a crew to New York for the ceremonies.

As for how the two station's entertainment offerings stack up against each other, on Monday, Sept. 9, when CBS aired its marquee prime-time programming *Everyone Loves Raymond* and *King of Queens*, WTEV pulled a 9.4/14. On the same night, WJXT drew a 2.8/4 with *Access Hollywood* at 8 p.m. and back-to-back episodes of *Frasier*.

BALTIMORE THE INTERNET

Local Politicians Take Their Hustings Online

America Online users in the Baltimore area got a heavy dose of early-morning politicking in the weeks leading up to last week's primary elections. And it was hard to miss: The red, white and blue banner touting a little-known candidate for Maryland's House of Delegates, Tony Campbell, was embedded on AOL's mail screen.

Though Campbell did not win the primary, his campaign's use of the Internet puts him in the company of heavyweights. Online political advertising has been seen mostly in higher-profile races. In 2000, presidential contenders George W. Bush, Al Gore, Bill Bradley and John McCain all used it.

This year it will move more into the mainstream, said Andrew Weinstein, a representative for AOL and former media strategist for Robert Dole's 1996 run for the presidency. Though he declined to name specific clients, or to give a scope of political-ad revenue, Weinstein said AOL's political-ad teams are lining up campaign dollars already. "It is moving beyond the experimental phase and into a more credible form of [political] advertising," said Weinstein.

Jonah Seiger, co-founder and chief strategist at Mindshare Internet Campaigns, an online public-affairs strategies firm, took a



REGGIE JARRETT/UPA

WTEV enjoyed solid ratings for the Jaguars' season-opening 28-25 loss to the Indianapolis Colts on Sunday, Sept. 8.

affiliate, Clear Channel's WTEV, to clearly reap the ratings benefit of its new affiliation with CBS.

At the time of the switch there was some speculation that CBS might be doing itself a disservice with local viewers who might not be able to find WTEV at its nosebleed Channel 47 dial position. So far, that doesn't seem to be the case.

"We were a good UPN affiliate," said Josh McGraw, president of Clear Channel in Jacksonville, "but there's no comparison at all.

more tempered view. "We've only put our toes in the water. We saw it a little bit [of online political advertising] in the 2000 presidential and congressional elections," he said. "I haven't seen a lot this cycle, but I think it's still early."

Campbell, a private-school administrator, was one of 10 candidates in his suburban Baltimore district who threw their hats in the ring for the Republican primary. Campbell used the AOL ads as part of a media mix that included theater advertising and a small local newspaper—*The Baltimore Sun* was too pricey for him. He considered transit advertising on a commuter train that ran through his district but decided to go with AOL instead. "Most people who are on the Internet are more informed voters," he explained. "On top of that, AOL has a number of families in my district."

"The Internet's advantage for advertising is that it's cheap, especially on a local basis," said Rudy Grahn, senior advertising analyst for Jupiter Research. Even a small campaign like Campbell's could afford the \$2,000 it cost him to run the banner ad, which clicked through to his Web site, in the whole Baltimore metropolitan area. It cycled early in the morning when people were checking their e-mail. In 2000, John McCain only spent \$1,000 more than Campbell on an Internet campaign with banner ads on more than 100 sites in Virginia. The ads produced a 2 percent click-through rate on 10,000 impressions.

Analysts believe that the Web, when used in a targeted manner, can inspire people to take action such as volunteering, attending rallies and writing letters. It is also a good tool for issue-oriented campaigns, which are more informational in nature. However, said Seiger, "the web advertisement is not very effective for branding." Jupiter Research's Grahn agreed branding is not a strength but said that could change. "In the long run, the Internet may prove to work with the warm fuzzy messages that politicians want."

"People in campaigns want to win. If putting a bumper sticker on Aunt Suzy's behind will help them win, they'll do that. But the Web has to prove itself," said Noble. —*Lauren Miles*

SEATTLE RADIO

KOMO-AM Flips to News

As part of Fisher Broadcasting's strategy to become the leading news brand in Seattle, KOMO-AM last week dropped its News/Talk format for an All-News approach that utilizes the talent and resources of its sister TV station, KOMO-TV.

The format switch coincides with the station's move into recently completed Fisher Plaza, where the TV station has been headquartered for about two years, making it easier for the two sister outlets to share resources and talent, and cross-promote Fisher's KOMO news brand.

KOMO-AM couldn't have chosen a more expensive or difficult local battle to fight as it is going up against Entercom Communications' KIRO-AM, the established News format in the market that is consistently tops in ratings and revenue.

Sources in the market say KOMO-AM, which in April outbid KIRO-AM for the broadcast rights to the Seattle Mariners beginning in 2003, paid more than \$10 million a year for the privilege. If true, it exceeds the cost of the rights for the New York Yankees and the \$6 million previously paid by KIRO. It's also at least \$3 million a year more than KOMO's 2001 revenue of \$7 million, according to BIA Financial Network.

Despite the cost, KOMO executives believe having the Mariners is key to growing the station's 2.8 overall audience share. "It is a critical piece of our strategy going forward because [the Mariners] will drive audience to the station," said Rob Dunlop, vp and general manager of Fisher's three radio stations in the market. Not to mention the revenue that should follow when the contract kicks in next year, which will be handled by KIRO's former Mariner sales staff, which left with the contract to go to KOMO. "About \$9 million of KIRO's [\$29.3 million] revenue is Mariner revenue," Dunlop said.

And because KOMO-AM isn't standing alone in its battle, agencies believe it may have a running start. "It may take KOMO a while, but it's a good move. The addition of TV personalities gives it a built-in audience.

That may help the station move up faster than it normally takes new News stations," said Kathy Begley, vp and broadcast director for Initiative Media. For example, the radio station's morning drive is hosted by former long-time KOMO-TV news anchor Eric Slocum, accompanied by Portland, Ore., radio news veteran Manda Factor.

Fisher is already using cross-promotion to get the word out on the AM station. A TV campaign was recently launched using KOMO-TV's key anchors, and a transit campaign will follow later this fall. KIRO, which has held the top News position in the market for several years, is ready for the new competition. "We'll get better and we'll dig in," said Ken Berry, station manager for KIRO, which, he said, has added another hour block of news at noon, although it made that decision before KOMO shifted formats.

Meanwhile, the Talk stations in town are also jockeying for position. KVI, KOMO's sister station and the leading Talk station in town, just picked up ABC Radio Networks' Larry Elder, while Entercom's KNWX-AM, which has been slowly dropping News for more Talk with the addition of Westwood One's Bill O'Reilly and Laura Ingraham, just picked up Salem Radio Network's Michael Medved after he was dropped on KVI to make room for Elder. —*Katy Bachman*

TV STATIONS / CABLE

Acme Show Adds Cable

Set to launch today (Sept. 16) on Acme Television's 10 WB affiliated stations, *The Daily Buzz*, the station group's new morning news program, last week picked up some additional cable distribution via the WB's 100+, according to ACME COO Doug Gealy.

WB 100+, which consists of 109 cable systems in 43 states reaching 8.5 million households, will feed *The Daily Buzz* through its Los Angeles-based command center via satellite to local cable headends starting Sept. 30.

For Gealy, the idea to launch a show out of Dayton, Ohio, that serviced other small markets was borne out of Acme's desire to create cost-effective news product for its own WB affiliated stations. Acme is partly owned by Turner Broadcasting Systems' chairman and CEO Jamie Kellner, who oversees the WB.

Russ Myerson, executive vp and gm of the WB 100+ group, says that the satellite feed to cable affiliates "look like, smell like and are like WB stations, except that they don't have [transmitter] towers." —*SB*





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Market Profile

BY EILEEN DAVIS HUDSON



SAN FRANCISCO CONVENTEN & VISITORS BUREAU

San Francisco-Oakland

MAJOR LEAGUE BASEBALL'S OAKLAND ATHLETICS, WHO SET A NEW AMERICAN LEAGUE record by winning 20 consecutive games in August and early September, have helped give the San Francisco Bay Area something to cheer about this year. While the region, which includes Silicon Valley, continues to

be mired in recession following the dot.com bust of 2001, having two successful hometown baseball clubs has provided some emotional relief. Across the bay in San Francisco last week, the Giants were battling for a wild-card spot in the National League playoffs.

Local media, including the broadcast TV outlets, are hopeful the market will rebound quickly. The San Francisco-Oakland-San Jose TV market ranks No. 5 in the nation with 2.4 million TV households. The headlining media story for the market this year has been the affiliation swap on Jan. 1 that saw Young Broadcasting's KRON-TV, a perennial market leader, lose its NBC affiliation and become independent. Following contentious negotiations with KRON over affiliate compensation, NBC opted to create an owned-and-operated station using Granite Broadcasting's KNTV, located in San

Jose. KNTV had served as the ABC affiliate in the Monterey-Salinas, Calif., market. On July 1, 2001, Granite sold back KNTV's ABC affiliation and then appealed to Nielsen Media Research to switch KNTV's market designation to San Francisco. Nielsen added the station to San Francisco last September.

KRON's ratings have declined since the switch. With the loss of NBC's prime-time programming, the ratings slide is most noticeable in its news at 11 p.m., which averaged a 2.7 household rating and a 6 share in this past July's

sweeps compared to a 6.4/16 in July 2001. "Any time you try to compare what KRON was to where it is today, I think it's unfair," says Paul Dinovitz, president and general manager of KRON, who says the station is competitive from 6 a.m. to 9 a.m., in early-evening news (its 5 p.m. newscast was second to ABC O&O KGO-TV), and in 4 p.m. news (KRON's was second to *Oprah* on KGO).

KRON, which now produces eight hours of local news, launched the market's only 9 p.m. late news in January. The hour-long newscast is averaging a 3-plus rating in households, says Dinovitz. Among new syndicated programming for this fall, KRON has acquired *The Dr. Phil Show*, which will air weeknights at 8 p.m. and rerun the next morning at 9 a.m. *Inside Edition* will move to early fringe to make room for *Pyramid*. KRON also has the broadcast rights to 10 basketball games for both Stanford and the University of California at Berkeley and three Pac 10 conference football games.

Jeff Block, vp/gm of Cox Broadcasting's Fox affiliate KTVU, says his station has benefited from the KRON affiliation swap. For instance, KTVU was in last place at 6 p.m. in adults 25-54 in the July '01 sweeps. This July, KTVU finished second in the demo with a 2.0 rating, just behind KGO, which pulled a 2.1.

"With this change, we're No. 1 in every newscast except 6 p.m.," says Block, who concedes the noon race is a toss-up between his station and KGO. KTVU, which plans to add a half-hour 6 p.m. news on Saturdays, has the only 10 p.m. late news in the market. When compared against the 11 p.m. news competitors, KTVU's 10 p.m. newscast continues to be No. 1 with a 7.7/14 in households. As for news at 11 p.m., KGO now claims the top spot formerly held by KRON. KTVU's second run of *Seinfeld* beat all competitors at 11 p.m. in July. Last week the station launched *The Montel Williams Show* at 4 p.m., pushing *Crossing Over With John Edwards* to 3 p.m.

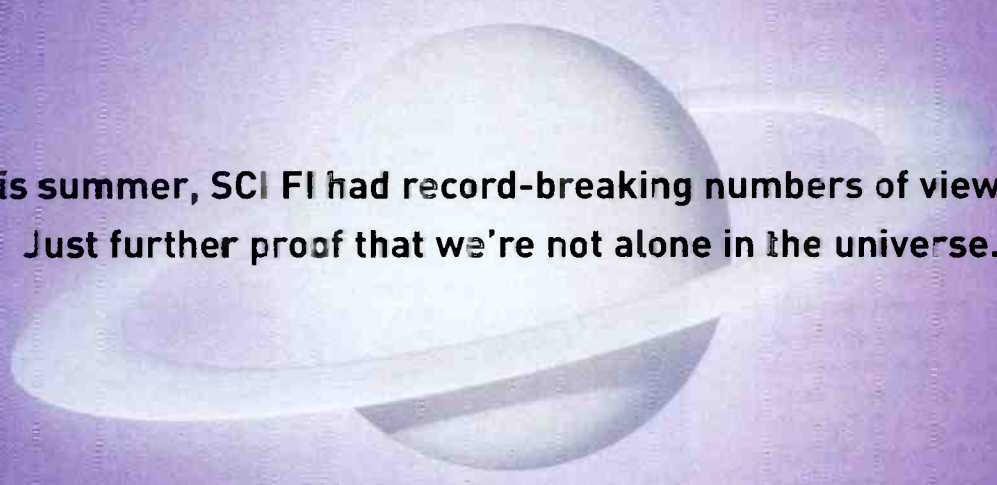
In terms of billings, KTVU has lead the market for the past decade. According to BIA, KTVU generated \$128.6 million in estimated revenue last year, compared to KRON's \$128.5 million and KGO's \$111.0 million.

Also shaking up the TV market in the last year have been the management shuffles at a half-dozen outlets. In August, the Viacom/CBS O&O KPIX-TV welcomed new gm Ron Loginotti. He had been gm of

NIelsen MONITOR-PLUS AD SPENDING BY MEDIA / SAN FRANCISCO

	Jan.-Dec. 2000	Jan.-Dec. 2001
Spot TV	\$681,563,710	\$581,607,460
Local Newspaper	\$468,181,548	\$397,293,910
Outdoor	\$60,206,536	\$52,750,978
Local Magazine	\$16,123,756	\$14,423,099
Total	\$1,226,075,550	\$1,046,075,447

Source: Nielsen Monitor-Plus



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Source: Nielsen Media Research. M-F 8-11PM HH delivery, 7/30-8/26/01 1613,000 HH delivery, 7/29-8/25/02 741,000 HH delivery. STARGATE: SG-1, FriDay 8/23/02, 9-10PM average 3 area household rating, time period, delivery average, record for all 1-hour non-premiere series episodes. Subject to qualifications which will be supplied upon request.

Market Profile

NIelsen RATINGS / SAN FRANCISCO

EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

KGW-TV in Portland, Ore. Under Viacom's duopoly ownership, KBHK, the market's UPN affiliate, relocated to KPIX's broadcast facility in downtown San Francisco this past April.

"There's a lot of flux in this marketplace, and our plan is to try to take advantage of that," says Longinotti, adding that he intends to strengthen KPIX's local news and make it "more relevant to the core communities."

Jerry Braet, KBHK vp/gm, is by far the most senior gm in the market, having led the station for the past nine and a half years. KBHK's fall lineup includes a new double run of *Will & Grace* at 7 p.m. and 7:30 p.m. and a 10 p.m. second run of *The Simpsons* (the first run airs at 7:30 p.m.). In the fall of 2003, KBHK will pick up an off-net run of *King of Queens* and in fall 2004, *Malcolm in the Middle*. Braet says of the market change, "You have essentially added an entire station [KNTV] into the mix. KNTV wasn't sold heavily to advertisers last year; now they are." He also says KRON's new status as an independent "dilutes the amount of programming available," making it tougher to acquire new shows.

Granite Broadcasting's WB affiliate KBWB doesn't produce local news. However, the station is planning some changes to its lineup this fall. The station will launch *Dharma & Greg* in syndication on Sept. 23 at 6 p.m., with a second run at 7:30 p.m. Sandwiched between *D&G* will be a double run of *King of the Hill* at 6:30 p.m. and 7 p.m. On Sept. 16 (today), KBWB adds *The Rob Nelson Show* at midnight, with a repeat at 3 a.m. *Suddenly Susan* and *Shipmates* were added to the schedule in late August.

Cox purchased independent station KICU-TV in March 2000. The station is housed in KTVU's facility, where the two have a master control center. As the local TV home of the A's since 1999, when it signed a five-year deal to air about 55 games a season, KICU has been buoyed by the team's recent success. KICU also carries Golden State Warriors NBA, pre-season Oakland Raiders NFL, and Pac 10 college football games, among others.

Another station player in the market is Paxson Communications' Pax TV outlet KKPX.

The market's Hispanic population is served by four Spanish-language stations. Univision Communications' KDTV and NBC's Telemundo affiliate KSTS are the dominant outlets. KDTV hit a milestone in the July sweeps, with its 6 p.m. local news finishing No. 1 in adults 18-49 with a 2.2 average rating, beating all the other 6 p.m. newscasts in the market. In mid-January this year, Univision launched a second Spanish-language network, Telefuturo, which runs on KFSF in San Francisco. Just before

Evening News

Time	Network	Station	Rating	Share
4-4:30 p.m.	Independent	KRON	3.5	11
4:30-5 p.m.	CBS	KPIX	1.4	4
5-5:30 p.m.	ABC	KGO	5.0	13
	Independent	KRON	3.8	10
	Fox	KTVU*	2.5	6
	CBS	KPIX	2.4	6
	NBC	KNTV	1.8	5
	Univision	KDTV**	1.5	4
	Independent	KICU*	1.4	4
	UPN	KBHK*	1.0	3
	WB	KBWB*	0.7	2
	Telemundo	KSTS*	0.6	1
	Pax	KKPX*	0.3	1
5:30-6 p.m.	Independent	KRON	3.0	7
	CBS	KPIX	2.4	6
6-6:30 p.m.	ABC	KGO	4.9	11
	CBS	KPIX	4.2	9
	Independent	KRON	2.9	6
	UPN	KBHK*	2.9	6
	Fox	KTVU	2.8	6
	NBC	KNTV	2.1	5
	Univision	KDTV	1.6	4
	Independent	KICU*	1.5	3
	WB	KBWB*	1.0	2
	Pax	KKPX*	0.5	1
	Telemundo	KSTS	0.4	1
6:30-7 p.m.	ABC	KGO	4.9	11
	CBS	KPIX	3.0	6
	Independent	KRON	2.9	6
	NBC	KNTV	2.1	5

Late News

9-10p.m.	Independent	KRON	3.5	6
10-11 p.m.	Fox	KTVU	7.7	14
11-11:30 p.m.	Fox	KTVU*	4.5	11
	ABC	KGO	4.2	10
	NBC	KNTV	3.7	9
	CBS	KPIX	3.4	8
	UPN	KBHK*	2.8	6
	Independent	KRON	2.7	6
	Univision	KDTV	1.4	3
	Independent	KICU*	0.9	2
	Pax	KKPX*	0.3	1
	WB	KBWB*	0.8	2
	Telemundo	KSTS	0.2	1

*Non-news programming Source: Nielsen Media Research, July 2002

RADIO LISTENERSHIP / SAN FRANCISCO

STATION	FORMAT	Avg. Qtr.-Hour Share	
		Morning Drive, 12+	Evening Drive, 12+
KCBS-AM	News	6.9	3.8
KGO-AM	News/Talk	6.8	4.6
KSFO-AM	Talk	5.5	5.5
KITS-FM	Alternative	3.7	2.0
KYLD-FM	Rhythmic Contemporary Hit Radio	3.2	4.2
KOIT-FM	Soft Adult Contemporary	3.0	4.3
KMEL-FM	Urban Contemporary Hit Radio	3.0	4.1
KFOG-FM	Adult Album Alternative	2.9	3.3
KBLX-FM	Adult Contemporary	2.8	2.8
KDFC-FM	Classical	2.7	3.3

Source: Arbitron Spring 2002 Radio Market Report

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Market Profile

Telefutura launched, TV Azteca, which broadcasts out of Mexico, launched Bay Area satellite station KTNC-TV.

In cable, AT&T Broadband is the dominant provider in the market with 90 percent of the DMA's cable subscribers. According to Scarborough Research, 75 percent of the market has cable, higher than the top 50-market average of 69 percent; 12 percent of the market subscribes to satellite service compared to the top 50-market average of 15 percent.

As for San Francisco's fractious newspaper market, rivals *The Examiner* and *San Francisco Chronicle*, now nearly two years removed from the breakup of their joint operating agreement and controversial sales, are still struggling to get back on course. The *Chronicle's* daily circ for the six months ended March 31 was 525,897; its Sunday circ was 537,145, both essentially flat compared to the same period in 2001. The *Examiner* has been under voluntary suspension from the Audit Bureau of Circulations since 2001 but has said it would have ABC begin auditing again sometime this summer. The paper's circulation director was unavailable for comment.

In November 2000, the Hearst Corp. sold the afternoon *Examiner*, which it had owned for 120 years, to the prominent Bay Area Fang family. Hearst ended up having to subsidize the sale, agreeing to pay the Fangs \$66 million over three years as part of the deal. Hearst then purchased the *Chronicle*. The convoluted transaction has permanently altered the newspaper landscape in San Francisco. Hearst had guaranteed *Examiner* staffers positions at the *Chronicle*, although management has been completely overhauled. The *Examiner*, on the other hand, had to recruit an entirely new staff, a process that's still in flux.

Before the sale, the *Examiner* was generally highly regarded. Since the Fangs took control, well-publicized family infighting, continuous management shuffling and prominent misspellings have contributed to the paper's image and credibility woes, media observers say. In October 2001, Florence Fang fired her son, Ted, as *Examiner* publisher, and took over the position herself.

Immediately after completing the purchase, the Fangs converted the *Examiner* to a morning publication to compete head-to-head with the *Chronicle*. The family also launched a Sunday edition, but discontinued its Saturday issue. On May 16, the *Examiner* underwent another monumental change, switching from broadsheet to tabloid. The Fangs also own *The Independent*, a thrice-weekly with a free distribution of about 379,000, and *AsianWeek*, a free,

SCARBOROUGH PROFILE

Comparison of San Francisco

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	San Francisco Composition %	San Francisco Index
DEMOGRAPHICS			
Age 18-34	31	31	101
Age 35-54	41	43	106
Age 55+	28	26	91
HHI \$75,000+	28	46	161
College Graduate	12	15	121
Any Postgraduate Work	11	15	139
Professional/Managerial	23	29	126
African American	13	9	67
Hispanic	13	17	140
MEDIA USAGE - AVERAGE-AUDIENCES*			
Read Any Daily Newspaper	56	59	107
Read Any Sunday Newspaper	64	60	94
Total Radio Morning Drive M-F	22	22	102
Total Radio Evening Drive M-F	18	17	95
Total TV Early Evening M-F	29	24	80
Total TV Prime Time M-Sun	38	35	92
Total Cable Prime Time M-Sun	13	10	75
MEDIA USAGE - CUME AUDIENCES**			
Read Any Daily Newspaper	74	79	106
Read Any Sunday Newspaper	77	75	97
Total Radio Morning Drive M-F	75	78	104
Total Radio Evening Drive M-F	73	73	99
Total TV Early Evening M-F	71	63	88
Total TV Prime Time M-Sun	91	89	98
Total Cable Prime Time M-Sun	59	52	88
MEDIA USAGE - OTHER			
Access Internet/WWW	62	70	113
HOME TECHNOLOGY			
Own a Personal Computer	68	75	111
Purchase Using Internet	37	48	128
Connected to Cable	69	75	109
Connected to Satellite/Microwave Dish	15	12	77

*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: 2001 Scarborough Research Top 50 Market Report (August 2000-September 2001)

46,000-circ, English-language weekly aimed at the city's large Asian American community.

The *Chronicle* is not without its share of travails. Sept. 27 will mark the final issue of the paper's daily afternoon edition, which it launched to fill the void left when the *Examiner* switched to morning publication. According to sources at the paper, it was selling only about 8,000 copies of the p.m. edition.

Despite public acknowledgements by management that the paper is under financial strain, the *Chronicle* won't stop its efforts to grow circulation. On Sept. 14, for instance, the *Chronicle* launched its revamped and repackaged Sunday bulldog edition (part of the Sunday paper that appears a day early). Previously unnamed, the new bulldog edition

is now called the *Sunday Early Edition*.

The *San Jose Mercury News* continues to be the reigning newspaper in the Silicon Valley area, though the local economic downturn forced cutbacks including the shuttering of its Sunday magazine. San Jose, Calif.-based Knight Ridder owns the paper, which had a daily circ of 275,312 for the six months ended in March, a 3.1 percent decline. Its Sunday circ fell 5.4 percent to 301,346. KR also owns another local paper, the Walnut Creek, Calif.-based *Contra Costa Times*.

Joe Natoli, *Mercury News* publisher, is looking to Sept. 19, when the paper will introduce three new weekly, zoned community sections. The tabloid sections will publish on Thursdays under the name The Guide and will be about

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Market Profile

32 pages at the outset, including ads, he says. The new sections will separately target Palo Alto, Sunnyvale, Cupertino, Saratoga, Los Gatos and Campbell. Natoli says each zoned section will have a circulation of about 30,000 and will be distributed as part of the regular paper in those specific areas. A small overrun of the sections will be distributed on retail racks. Natoli says the paper plans to increase staff for the effort.

The *Mercury News* also has recently hired Don Poepping from the Minneapolis *Star-Tribune* for the newly created position of director of target marketing. He will handle the paper's development of a direct marketing operation, a venture aimed at providing advertisers with address-specific direct marketing opportunities to target customers, Natoli says.

MediaNews Group owns several papers in the market, the largest of which is *The Oakland Tribune*. Its weekday and Sunday circs for the six months ended in March were 52,213 and 64,993 respectively. Both are flat from the previous year. Papers in its East Bay suburban cluster include the *San Mateo County Times* in San Mateo, Calif., and *The Argus* in Fremont, Calif.

At least three free weekly newspapers serve Hispanic readers in the Bay Area: *Nuevo Mundo*, a sister paper to the *San Jose Mercury News*; *El Observador*, a bilingual publication also based in San Jose; and *El Mensajero*, which is located in San Francisco. According to Scarborough Research, Hispanics make up 17 percent of the market's total population.

Clear Channel Communications controls about 24.3 percent of the radio ad revenue, an estimated \$99.7 million (see chart). Infinity Broadcasting is a close second at 21.7 percent with an estimated \$86.7 million.

Among the smaller broadcasters, Susquehanna Radio has had success with its Adult Album Alternative station KFOG as has Inner City Broadcasting with its Adult Contemporary outlet KBLX-FM. Both stations are in the top 10 in the market.

One thing Bay Area residents can't seem to get enough of are News and Talk radio stations. This market is unusual because three of the top 10 stations overall are AM stations in these formats. ABC Radio's News/Talk station KGO-AM is the No. 1 station overall (and the top biller at \$35.4 million, according to BIA). ABC's Talk station KSFO-AM is No. 2 overall in the market, followed by Infinity's News outlet KCBS-AM. Radio Unica's Spanish/News/Talk KIQI-AM and Univision Communications' Spanish Adult Contemporary KEMR-FM are the leading stations serving Hispanic listeners in San Francisco.

RADIO OWNERSHIP

OWNER	STATIONS	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Clear Channel Communications	1 AM, 6 FM	19.5	\$99.7	24.3%
Infinity Broadcasting	2 AM, 4 FM	13.1	\$86.7	21.7%
Bonneville International	1 AM, 3 FM	9.0	\$46.8	11.4%
ABC Radio	2 AM	10.8	\$46.7	11.4%
Susquehanna Radio	1 AM, 3 FM	5.6	\$38.4	9.4%
Inner City Broadcasting	1 AM, 1 FM	3.6	\$17.3	4.2%
Univision Communications	2 FM	1.9	\$17.8	1.9%

Includes only stations with significant registration in Arbitron diary returns and licensed in San Francisco or immediate area. Ratings from Arbitron Spring 2002 book; revenue and owner information provided by BIA Financial Network.

NEWSPAPERS: THE ABCS

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Santa Clara County: 591,446 Households				
<i>San Jose Mercury News</i>	217,031	245,964	36.7%	41.6%
<i>San Francisco Chronicle</i>	28,454	25,792	4.8%	4.4%
Alameda County: 550,529 Households				
<i>San Francisco Chronicle</i>	91,332	92,995	16.6%	16.9%
<i>The Oakland Tribune</i>	58,303	55,611	10.6%	10.1%
<i>The (Hayward) Daily Review</i>	38,497	38,737	7.0%	7.0%
(Fremont) <i>The Argus</i>	32,276	32,251	5.9%	5.9%
<i>Contra Costa Times</i>	28,096	29,248	5.1%	5.3%
(Pleasanton) <i>Tri-Valley Herald</i>	20,883	20,875	3.8%	3.8%
<i>San Jose Mercury News</i>	16,985	19,857	3.1%	3.6%
Contra Costa County: 379,845 Households				
<i>Contra Costa Times</i>	149,586	159,230	39.4%	41.9%
<i>San Francisco Chronicle</i>	51,749	56,228	13.6%	14.8%
(Pleasanton) <i>Tri-Valley Herald</i>	10,019	9,804	2.6%	2.6%
<i>The Oakland Tribune</i>	7,543	6,811	2.0%	1.8%
San Francisco County: 330,124 Households				
<i>San Francisco Chronicle</i>	129,318	118,732	39.2%	36.0%
<i>San Jose Mercury News</i>	4,212	2,877	1.3%	0.9%
San Mateo County: 265,379 Households				
<i>San Francisco Chronicle</i>	82,604	9,698	21.1%	33.8%
<i>San Jose Mercury News</i>	18,599	18,796	7.0%	7.1%
Sonoma County: 188,475 Households				
<i>Santa Rosa Press Democrat</i>	78,780	87,897	41.6%	46.6%
<i>San Francisco Chronicle</i>	18,627	21,280	9.9%	11.3%
Marin County: 106,478 Households				
<i>Marin Independent Journal</i>	37,887	38,279	34.9%	35.3%
<i>San Francisco Chronicle</i>	37,499	41,980	34.6%	38.7%
Napa County: 49,908 Households				
<i>Napa Valley Register</i>	18,620	19,109	37.3%	38.3%
<i>San Francisco Chronicle</i>	8,625	9,960	17.3%	20.0%
<i>Santa Rosa Press Democrat</i>	1,942	1,885	3.9%	3.8%
<i>Vallejo Times Herald</i>	1,482	1,551	3.0%	3.1%

Source: Audit Bureau of Circulations

In out-of-home, Clear Channel offers about 350 bulletins, 1,480 30-sheets, 350 8-sheets, 50 wallscapes and 250 bus shelters. The company will begin build-out on more than 200 more bus-shelter faces in Oakland this winter. Viacom offers bulletins, 30-sheets, 8-sheets, walls, buses and mall advertising.

Locally based Foster Media (its sister company is Foster Interstate Media) also serves the market, though president John Foster describes

his company as a "high-end boutique advertising company" featuring select high-impact sites such as the Oakland-Alameda County Coliseum complex, home of the A's, Raiders and Warriors. "We don't compete with Clear Channel and Viacom on volume," he said, adding that Foster will be adding kiosks, entry gates, and three towers along the nearby freeway measuring eight to 10 stories and featuring 48-foot-high by 25-foot-wide backlit displays. ■

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INTERACTIVE ADVERTISING BUREAU ROUNDTABLE DISCUSSION

At a recent roundtable discussion about the future of interactive broadcasting, several professionals—both on the buying and selling side—discussed the promises and pitfalls of a young industry that has had to grow up quite fast in a short period of time. Moderator Joseph Jaffe, a former director of interactive media at TBWA/Chiat Day U.S.A., kept a lively debate going among the panel's participants. They included: Dan Schwartz, VP of Sales for Real Networks; Matt Feinberg, Senior VP of Radio Broadcast Buying at

Zenith Media; Lynn Bolger, Managing Director at Initiative Media; Karl Spangenberg, President & CEO of Lightningcast, Inc.; Adam Gelles, Director of Industry Initiatives for the Interactive Advertising Bureau; Chris Neuner, President/CEO of Greater Than One; Larry Harris, Senior VP and Digital Creative Honcho at FCBi; Victor Siegel, President & CEO of Hello Network; and Jon Klein, Founder & CEO of The FeedRoom.

An edited transcript of the discussion follows.

ADAM GELLES: I just want to thank all of you for participating in today's roundtable discussion to articulate the value of interactive broadcasting to the advertising community. Karl is going to talk a little bit about why we're changing the name of the Streaming Media Committee to Interactive Broadcasting.

KARL SPANGENBERG: We were working for a few months as the IAB Streaming Media committee and we talked about the wisdom of trying to simplify the message because Streaming Media is, after all, a technology and we're trying to talk to agencies and clients about an advertising medium. The thinking behind it is that we want to come up with terms and language that people could relate to and understand. The word "broadcasting" seemed to help and by putting the word "interactive" in front of it, it seemed to align with the mission of IAB and also put out there a promise that there is an interactive component.

GELLES: Statistically, [our] research indicated about 79 percent of the respondents of which about 70 percent were from advertising agencies—said it was a good or very good idea to change the name from Streaming Media to Interactive Broadcasting.

JOSEPH JAFFE: I think this is probably a very good time to be having this discussion because there are perception issues. What do you understand by it? And more importantly, what do you think respective clients out there will say, especially the reticent ones?

JON KLEIN: Well I think anything that makes a media buyer realize that this is more like television than like banner ads is a good thing because it speaks to the need to educate the buyers, which we found to be the biggest challenge. We have great products that a lot of people watch and interact with and somehow

we're lumped in with banner ads and we prefer to associate with our cousins in television.

MATT FEINBERG: I think the term interactive media is a better term, much as a parent company to the sub-sets of streaming audio and streaming video. I think it's confusing when you start to treat those little sub-sets as major titles. I'm pretty conversant in it and I get confused sometimes.

LYNN BOLGER: I think the name Interactive Broadcasting is way more inviting than rich media, or anything else that has come along down that pipe. People simply understand what it is.

VICTOR SIEGEL: Also, when you get into broadcasting it's actually one step up. We're always talking to media planners or associate media planners. Broadcasting to them makes a lot more sense because that's something they understand innately better.

BOLGER: Right, and then you can introduce all of the really valuable interesting stuff that interactive media can do. And once you get them hooked in you can demonstrate the incremental value of what it is we're all selling.

KLEIN: Better-casting, we should call it that.

FEINBERG: I'm a big fan of calling it what it is because I'm used to seeing lots of smoke and mirrors and it's very frustrating...As much as I like fancy and flashy and lights and colors, just tell me what it is, give me the bottom line and let's get to it.

CHRIS NEUNER: I think we really need to figure out what the definition is and exactly what we're doing and make our clients understand exactly what we're doing in order for them to have a higher level of comfort. Because we all know that streaming media in

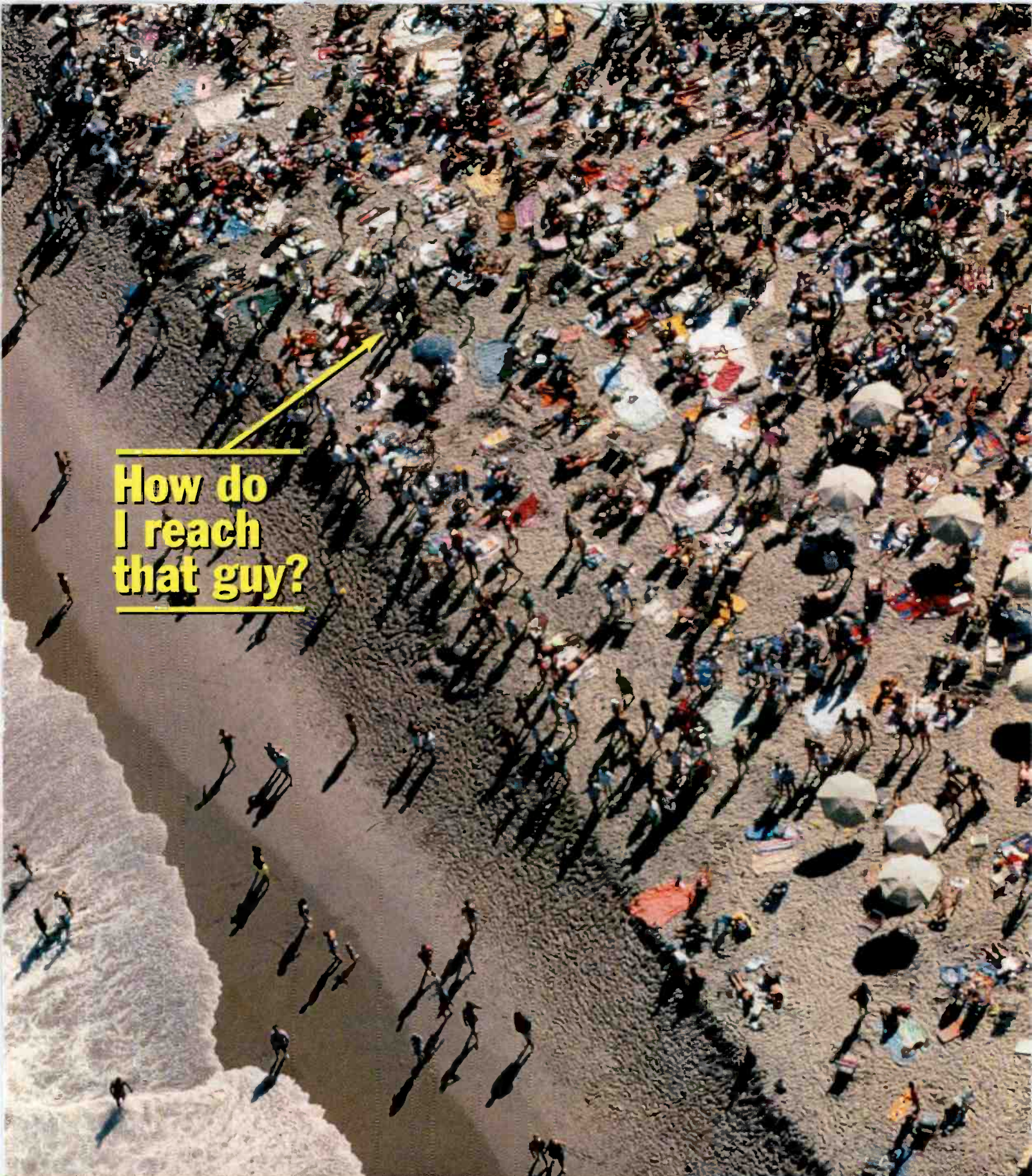
certain instances really, really does work well. Some instances it doesn't.

KLEIN: We would like to talk to the broadcasting people, not the interactive people [at the ad agencies] ultimately because it's a bigger pot and because of what are we selling. We're selling video ads. Yes, they're interactive but also they're a better kind of video ad...Yet it defies logic because if you go to mine and several other sites you will feel as if you're watching television, only better because you can actually interact with it, but you're still watching television. What's the phobia about it and how do we bridge that in addition to doing the research that shows how you compare apples to apples?

We did a live broadcast of WNBC's coverage of the World Trade Center Memorial a couple of months ago. They got 30,000 people to the site in one 15-minute period. That's equal to three tenths of a ratings point in the New York market. That's when the light bulb went off for us and we said, "Wait a second, let's sell this according to Nielsen ratings. We did a 0.3. We should be generating more revenue than anybody that did a point two, including some cable channels."

SCHWARTZ: Reach is the significant issue. If you can deliver a 0.3 and sustain that through time, you have a medium that these people would be happy to talk to you about. It's the fact that you can only have a peak or valley—and I'm not saying we can or we can't... I think the defining moment for this business is when we reach whatever that magic threshold of reach is on an industry-wide basis. And whether it's home adoption of broadband that drives it or whatever it is that finally gets us over that cliff.

LARRY HARRIS: Well, it doesn't matter if it's broadcasting because the interactive part is aspirational with regard to broadcast video



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INTERACTIVE ADVERTISING BUREAU ROUNDTABLE DISCUSSION

streaming. It's got absolutely nothing to do with how I sell clients. It's interactive media—this is a channel. Your customers are here.

JAFFE: There are two trends that we're observing and they're very important. One, technology is infusing itself into every form of media, traditional or interactive. Second, consumers don't care how they get content and communication. They just care about their content and the quality of it. Ultimately consumers that are empowered—and they do initiate these forms of communication—will ultimately decide to get a form of content anyway as opposed to one specific device. We've seen that the Web, to this point in time, hasn't worked on TV and a lot of people are skeptical about the TV on the Web. It seems that a form of interactivity is necessary in order to make TV work on the Web.

FEINBERG: I don't think TV is going to plug

itself on the computer or the Web. It's the other way around. That's what's going to be big in my opinion. When my parents turn the TV on and flip a few buttons and cruise the Web on the television, that's when I think the whole landscape changes. I don't think it's that far away.

KLEIN: Sept. 11th everybody did a huge amount of streaming—it played into the hands of streaming video delivered on the PC because it took place during the work day when most Americans were away from the television set and it was highly visual. You had to see it; you couldn't just read about it. We posted the NBC live coverage of the event and we streamed a million live streams of video on the 11th and 12th. What was fascinating was to hear other people come back and complain to us. What they complained about was they clicked on the full screen version and then went about their business. But every time the story would change it would shift back to the small screen.

They just wanted to sit back and watch this like television. That blew me away.

JAFFE: Right now Jon is pitching you [agency] guys. What are the obstacles, what are the challenges, what are the reasons why they're not using streaming or interactive broadcasting? Let's talk about what's stopping you from taking 50 percent of your digital budget and giving it to interactive broadcasting or, even better, being able to migrate TV dollars over.

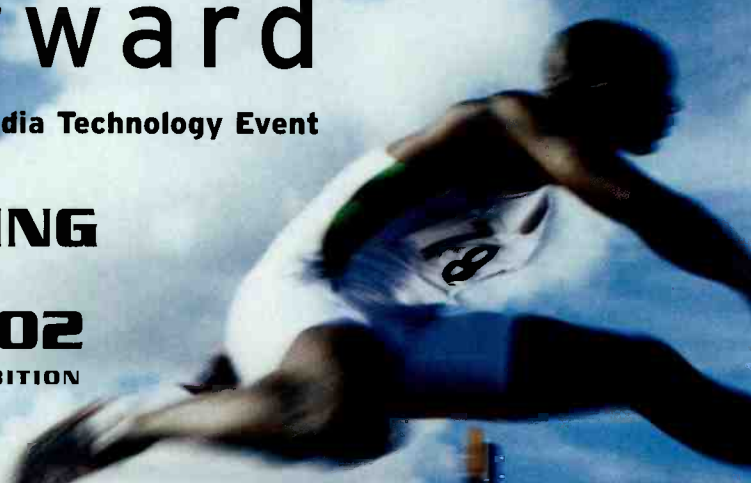
NEUNER: Bandwidth. I think that is the number one limiting factor when it comes to interactive broadcasting. Because basically if I'm going to watch CNBC or CNBC online I'm probably going to watch it off line just because I know it's immediate and there's no degradation on the actual content. I think the consumer is going to go wow, the day we can use The FeedRoom and all of a sudden there's a content spot about allergies and I can start

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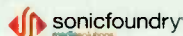
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learning about that medicine right then.

The number one prohibitive factor: the perception of media. When I come to a client and I say let's take a commercial, we can digitize it in many areas and put it online, the initial knee-jerk reaction is why. We can talk about the branding studies and how streaming and the Internet can really be used as a branding vehicle, but the number one misconception of online is that it's only a direct marketing vehicle. So why would I attribute the \$5,000 or \$10,000 cost associated when I can just literally plug a 50 cent text link ad onto Overture and Google?

BOLGER: You have to have a critical mass against a specific audience, it can't just be gross impressions, it's got to be an audience that is perceived to be unique and have value. And if it's a business and that's what all you guys want to go after then fine.

SIEGEL: It also goes back to a certain amount of targeting by category. You start looking at what are the categories where interactive broadcasting, advertising-driven messages would be the most instructive. We just helped Austin Powers get launched and XXX and things like that and those are movie trailers. That is already existing content that's shown somewhere else that can be digitized at great broadcast quality to an audience that is already sensitive to that kind of message.

SCHWARTZ: We are paying for the sins of the past. Clients are so reticent to try new things online because every one of them has some experience in the past that tells them not to make that mistake again. I think it's going to take proving what we can do over and over again before some of these people dip their toes into that.

JAFFE: What are the primary metrics right now? Jon, you spoke about a 0.3 [rating] earlier. Matt, is a 0.3 a 0.3? Is that the true apples to apples and should that be the beginning and end of the conversation? Should that be how success is measured?

FEINBERG: Getting back to what Jon said earlier, he wants to see broadcast departments. Well if you are going to see broadcast departments you better have that 0.3 backed up or you're out of there.

I wanted to touch on one more thing: talent fees. We got killed last year. We were all set to go out of the gate when all of a sudden the production team calls us and the talent fees killed us. I think as I understand it that most existing contracts do not have the Internet component, therefore, the talent fee was exorbitant and no one in their right mind was going to put anything out over the Web.

To see the full Interactive Broadcast of this discussion, go to www.adweek.com.

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» As the number of viewers who grew up with their TV sets attached to cable boxes steadily rises, the distinction between the broadcast and cable networks is becoming fuzzier. But that hasn't slowed the fierce competition for eyeballs between broadcast and cable. As they start rolling out their fall schedules this week, the broadcasters are keeping a nervous eye on the return of HBO's *The Sopranos*, as John Consoli reports. Meanwhile, Megan Larson looks at several unusual new takes on the reality genre that cable will be serving up this season. And Marc Berman gets the TV stars of yesteryear to critique some of this fall's new shows.

NETWORK TV

Top-Slot Dogfight

NBC AND CBS HAVE POSITIONED THEIR HEAVY ARTILLERY TO WIN THE NEW SEASON IN VIEWERS AND DEMOS, WHILE THE WB, FOX AND ABC TRY TO REGAIN MOMENTUM BY SHUFFLING PROGRAMS AND SEEKING YOUNGER AUDIENCES BY JOHN CONSOLI

The battle for prime-time supremacy between NBC and CBS is expected to intensify this season. While most agency media execs expect NBC to again prevail in the ratings race to win the coveted adults 18-49 demo, they believe that CBS' schedule has the stuff to narrow the gap significantly. Without the Olympics this year to attract a mass audience for two weeks, NBC is vulnerable to be overtaken by CBS in the competition for household ratings and total viewers.

"CBS will give NBC a run for its money this year in the 18-49 demo," predicts Laura Caraccioli, vp and director of Starcom Entertainment. She's quick to add, however, that "NBC still has *Friends*," which drew network TV's largest audience of adults 18-49 last season and is expected to do the same this year, which could be the show's last. But Caraccioli says CBS' returning Monday comedy block, including the hit *Everybody Loves Raymond*, has been drawing more 18-49 viewers, as has *Survivor* and *CSI: Crime Scene Investigation*. She believes *CSI: Miami*, the new CBS drama on Monday nights, will also draw a younger audience to CBS, as will its new Monday comedy *Still Standing*.

Steve Sternberg, senior vp/audience analysis for Magna Global USA, says CBS will get better ratings than it did last season because all of its new shows are better than the shows they are replacing. "That's not always the case," says Sternberg. "*CSI: Miami* will do better than *Family Law*, *Presidio Med* will certainly do better than *Wolf Lake*, and *Without a Trace* will do better than *The Agency* did in its time period."

Overall, the networks will make several programming moves this sea-

son aimed at stemming the steady leak of prime-time viewers that has happened over the past decade. CBS is making a concerted effort to shore up its 10 p.m. programming, not only to compete with NBC but also to give its local stations a potentially larger audience leading into their local newscasts. CBS will add four new dramas at 10 p.m.: *CSI: Miami* on Mondays, *Presidio Med* on Wednesdays, *Without a Trace* on Thursdays, and *Robbery Homicide Division* on Fridays. Other than *Presidio Med*, which is expected to skew more heavily to a female audience, the other three new CBS dramas are expected to target harder-to-reach, male viewers.

While NBC is expected to once again to win the Thursday-night ratings battle, especially in adults 18-49, most of the other networks are aggressively programming the night, hoping to draw more viewers to broadcast TV overall. CBS showed that was possible last season by moving *CSI: Crime Scene Investigation* from Fridays to Thursdays, coupling it with *Survivor*. CBS is hoping that *Without a Trace*, which has a sensibility similar to *CSI*'s, will have a much better audience flow leading out of that show than *The Agency* did last season. *The Agency*, which skewed older, has been moved to Saturdays at 10 p.m. leading out of another older-skewing but successful CBS show, *The District*.

Meanwhile, ABC is trying to draw younger crowds. On Thursdays, ABC will air *Dinotopia*, the animated show based on its miniseries of last season, at 8 p.m. against NBC's *Friends* and CBS' *Survivor*, and will run new drama *Push, Nevada* at 9 p.m. against *CSI* and NBC comedies. *Push, Nevada* can be watched as a standalone drama, but it also has an Internet

FEEL GOOD VIEWING: The WB's *Everwood*, with Treat Williams (right) and Gregory Smith, is a product of the Family Friendly Programming Forum.



game element, which the network is hoping will attract younger viewers. Media execs believe that *Dimotopia* will draw better ratings than *Whose Line Is It Anyway?*, which occupied the time slot last season.

The WB, which for the past two years has aired only sitcoms on Sunday to sparse audiences, is shifting direction and moving two of its veteran dramas, *Charmed* and *Angel*, to Sunday nights from 8 p.m. to 10 p.m. The WB will open Sunday-night prime time at 7 p.m. by re-airing the first year of its third-year drama *Gilmore Girls*, titling it *Gilmore Girls: Beginnings*. The network did this with *7th Heaven* a few years back, drawing new viewers to the show and turning it into a hit. The WB, in an arrangement with its affiliates, has also taken the 5 p.m. to 7 p.m. Sunday access hours back and will air repeat episodes of that week's first-run dramas *Smallville* and *Everwood*. And new Thursday sitcoms *Family Affair* and *Do Over* from 8 p.m. to 9 p.m. could do as much as two share points higher than *Popstars* did last year.

Fox appears to be picking up some of the WB's comedy slack on Sundays, replacing departed drama *The X-Files* with two sitcoms—*Oliver Beene* and *The Grubbs*—making Fox's entire Sunday lineup a sitcom night. While Fox's two new Sunday comedies are expected to skew a bit older, two of its new dramas, Wednesday's *Fastlane* and Friday's *Firefly*, hope to draw significantly younger audiences. Both shows are being heavily promoted on teen-skewing cable networks, including MTV. Another younger-skewing Fox drama, *Septuplets*, is scheduled to make it onto the schedule on Thursday night in midseason.

One criticism the networks have gotten for their new programming has been that there are too many crime dramas and too many medical shows—CBS alone has five. In several instances, these shows are going up against one another. On Wednesdays at 10 p.m., CBS' *Presidio Med* goes up against ABC's *MDs*. On Fridays at 10 p.m., CBS' *Robbery Homicide Division* airs up against NBC's *Law & Order SVU*.

Magna Global's Sternberg says that despite how it looks on the surface, it's important to remember that all these shows are very different. "Programs within the same genre are never really the same," he says. "CSI is not the same as *NYPD Blue*, and neither one of those is the same as *Law & Order*. Even the three *Law & Orders* are different. *Crossing Jordan* will skew more female, while *CSI: Miami* will draw a dual audience but bring in more males. *Presidio Med* will skew older than *MDs*. The only case that might be a problem is *Robbery Homicide Division* and *Law & Order: SVU*, up against one another with very close sensibilities and target audience."

Sternberg and several media buyers described as "unfortunate" Fox's move to shift its hit sitcom *Bernie Mac* to the 8 p.m. Wednesday time slot to go head-to-head with ABC's *My Wife and Kids*.

"Neither one will do as well as they would have done if not airing opposite one another," says Sternberg of the sitcoms, which each star prominent black comedians. ABC contends its show is returning to the same time slot it aired in last year and has questioned Fox's motives.

Fox Television Entertainment Group chairman Sandy Grushow takes

umbrage at ABC's stance, contending there is only a 25 percent duplication among black viewers who usually watch both shows. "We really don't feel like we're under any obligation to ensure the success of any of our competitors' shows," notes Grushow. "Last year, ABC made a decision to replace *Bob Patterson* on Tuesday night at 9 with *NYPD Blue*. No coincidence that it premiered its two-hour show on the same night that [Fox's new drama] *24* premiered. I don't remember [Walt Disney Co. president] Bob Iger calling me and asking me for my permission."

The Sunday-night battleground bears watching in the fourth quarter, with HBO's hit drama at 9 p.m., *The Sopranos*, expected to impact ABC drama *Alias* and NBC drama *Law & Order: Criminal Intent* in the time period. *The Sopranos* averaged 9 million viewers per episode when it last aired in the spring of 2001, but that number was up 3 million from the previous year. A similar increase would give the mob drama an audience of 12 million vs. its ABC and NBC competition.

Mitch Metcalf, vp of scheduling for NBC, acknowledges the drawing power of *The Sopranos* but believes "a couple of good shows can coexist in a time period." And Sternberg says people who usually watch cable on Sunday will probably tune in to *The Sopranos*. "You have to deduct that number from the total *Sopranos* audience to determine how many viewers are watching it instead of broadcast network TV," he says. "That will be the impact."

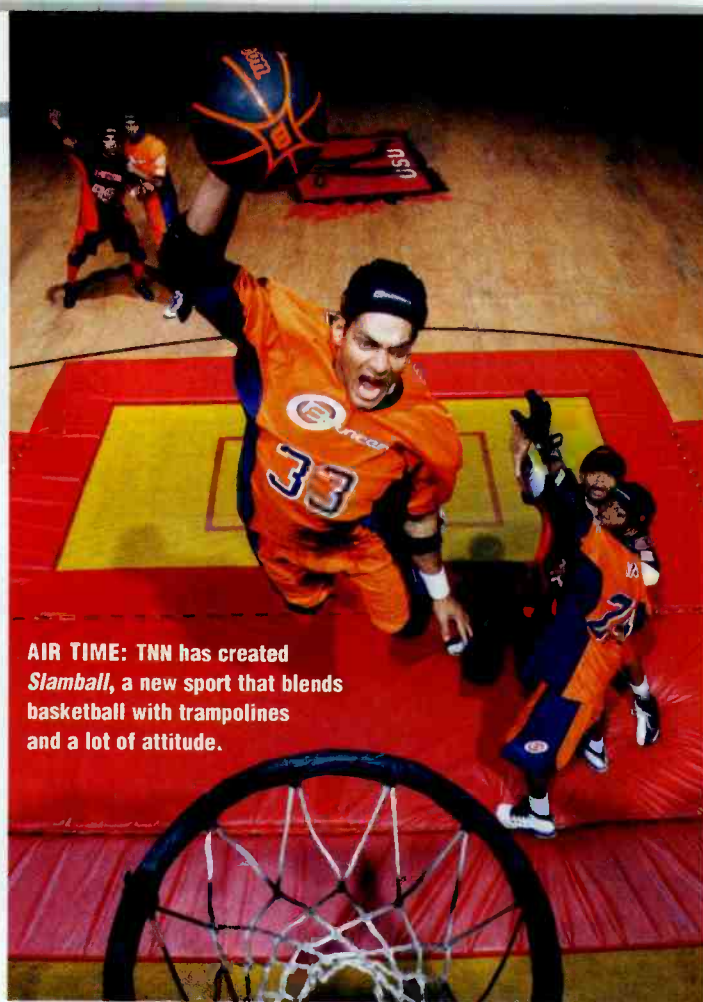
Overall, most media execs see few breakout hits, but that has been true in most years. Among the new shows given the best chance of success by media buyers and agency programming execs this season are the WB's drama *Everwood* and sitcom *What I Like About You*; ABC's sitcom *8 Simple Rules for Dating My Teenage Daughter*; CBS drama *CSI: Miami*; and NBC's drama *American Dreams*. A couple of Fox shows, because of audience flow, could also work. *Girls Club*, the new David E. Kelley drama leading out of Fox hit *Boston Public*, and *Cedric, the Entertainer*, leading out of *Bernie Mac*, both have a chance of drawing audience from their successful lead-ins.

Media buyers also like Fox's drama *John Doe*, but they believe it is in too tough of a time period, 9 p.m. Friday against two other new dramas on ABC (*That Was Then*) and CBS (*Hack*), with too few viewers to go around. Many believe the show, if it is to succeed, needs to be moved. A similar problem exists for ABC's 10 p.m. Wednesday drama *MDs*, liked by several media execs but facing tough competition from CBS' new *Presidio Med* and NBC's powerhouse *Law & Order*.

"What will matter most is what matters most every season: the quality of each show," says John Rash, chief broadcast negotiator for Campbell Mithun. "If the quality is high, people will find it and watch it; and if it is not, no level of stunting is going to save it." ■



BACK TO THE FUTURE: Buyers have high expectations for NBC's retro series *American Dreams*.



AIR TIME: TNN has created *Slamball*, a new sport that blends basketball with trampolines and a lot of attitude.

CABLE

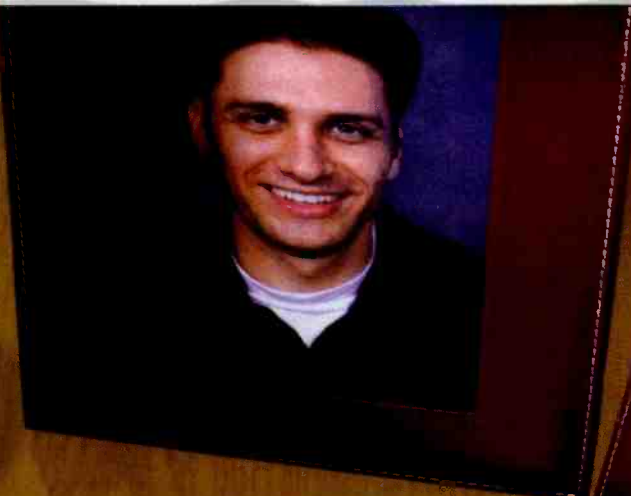
Strange Brew

IN THEIR BID TO RETAIN VIEWERS THIS FALL, SEVERAL NETWORKS ARE ONE-UPPING EACH OTHER WITH ODDBALL REALITY SHOWS BY MEGAN LARSON

The cable programming community can safely lay claim to creating the world of reality television as we know it—*Survivor* would have never come about on CBS had the path not been blazed in some sense by MTV's real-life soap opera *The Real World* a decade earlier.

It appears cable networks are as eager as ever to find their own peculiar spin on the genre, no matter how deeply it is being mined across the TV landscape. From a behind-the-scenes look at a local cable-access talk show (think *Larry Sanders* meets *Wayne's World*) to a female version of *The Man Show*, this year's crop is all the more outlandish than even MTV's runaway hit *The Osbournes*. Why? As audiences continue to thin out across that landscape, every net is doing its best to hang on to its viewers, by any means necessary. "Everyone has acknowledged that

AMERICAN DREAMS: CHRIS HASTON/ABC PHOTO; SLAMBALL: PATRICK ECCLES/NETHE NEW TNN



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cable is attracting half the viewing audience in prime time by offering original stuff in the summer. But when broadcast comes back in the fall with new schedules, what are you going to do? You are going to be a little outlandish," says Stacey Lynn Koerner, senior vp and director of broadcast research at Initiative Media.

The Anna Nicole Show, which launched August 4 on E!, was one of the first signs that things were going to get kookier on cable this year. Critics declared that American TV had finally dunked itself into a cesspool (as opposed to just floating around in it). For E!, it wasn't about grossing out the public, it was strategy. "In this fragmented marketplace, we are trying to get people to stop at the channel, but we are not really focusing on the outlandish," says Mark Sonnenberg, executive vp of entertainment. "We want compelling programming that fits our niche." Sonnenberg adds that Anna Nicole Smith proved to be a draw when an episode of *True Hollywood Stories* about her delivered mammoth ratings.

Sometime in the fourth quarter, E! is taking the reality concept in a different direction with the *Michael Essany Project*. The show goes behind the scenes of a real late-night cable access talk show hosted by Essany, a teenager from Valpariso, Ind., who does the show from his living room with the help of his mom (audio and video), his dad (craft services) and his best friend (co-host).

ABC Family also tries its hand at the reality concept in first-quarter 2003 with *My Life Is A Sitcom*, which follows the search for a perfect "real-life" family on which to base a classic half-hour sitcom. *My Life* borrows from the contest aspects of *American Idol*—the show begins with a dozen or so families of various sizes and backgrounds, but only one fam-

ily wins. "I don't know if we are trying to top *The Osbournes* or be outrageous, but I am looking for something that really vests the viewer, like *American Idol*, and really gets them involved with story and the people," explains Joel Andryc, executive vp of program development.

ABC Family is in need of a "lightning rod," Andryc believes, that can get people talking about the network and start sampling the schedule. *My Life* is ABC Family's first major original series since Walt Disney Co. took over; and if it is a success, Andryc said he will look at other 'family' group dynamics—people who work closely together in an office or neighbors in an apartment building—and develop a series around it. "We feel that this show has a lot of water-cooler potential," says Andryc.

Brian Graden, who was recently named president of entertainment for VH1, MTV and MTV2, believes over-the-top reality programming is an assured attention-getter. "It is very difficult to get viewers to invest in recurring characters each week when you are a 0.6 rated cable channel like MTV. USA and Lifetime have large enough audiences where they can get sampling for their series."

Under Graden's auspices, VH1 is turning the camera on Liza Minnelli and her husband, David Gest, in *Liza and David*, slated for an October rollout. "Where MTV is about the next evolution, the cutting-edge, VH1 is about pop culture and what is being talked about now," says Graden. "We have exhausted music history, but we wanted to tap into VH1's equity in music nostalgia and how music resonates with real people's lives." At first glance, *Liza and David* comes off as a rather blatant riff on *The Osbournes*, which Graden helped develop at MTV. But there are different elements to the show in each episode—a dinner party with friends and a musical extravaganza of some sort—that make it stand apart from the other reality shows of famous people, Graden says.

Like ABC Family and VH1, Oxygen has also had a trying time finding the right programs to lure its target audience, women 18-plus. Believing that the target demographic craves more comedy by and for women, Oxygen is launching two new shows, *Girls Behaving Badly* and *O2 Be*, on Sept. 22. Like Comedy Central's testosterone-laden *The Man Show*, only replaced with estrogen, *Girls Behaving Badly* is a hidden camera show that showcases women whistling at men, asking them to drop their pants and do other degrading things that men usually ask of women. *O2 Be* is a parody of daytime TV targeted toward women. "Because we like to think of our net's audience as one that cares about the environment, current events and family, our challenge is to make comedy relevant to the viewers," explains Jen Cotter, vp of development for Oxygen. "We thought this was a first step toward that humor our demo is looking for."

Lastly, imagine taking basketball and then adding a little wrestling razzle-dazzle and trampolines. The end result? TNN's *Slamball*, the new hoops game that premiered on TNN in early August as part of its "Slammin' Saturday" lineup, where players perform a triple axle off a trampoline before slam-dunking, putting the series into its own league.

This, of course, is from the network that brings us WWE wrestling. But it's by design. "*Slamball* is an aberration in the sense that we are not interested in reality programming, but want to launch a sport and cultivate it through TV," says Mike Tollin, partner in Tollin/Robbins Productions. "I'm a little astonished at the growth of reality programming. I understand the attraction of low-cost programming to beat the summer reruns, but we are just not interested." ■

CHICKS IN FLICKS: Oxygen's newest original, *Girls Behaving Badly*, uses hidden cameras to catch women, well, behaving badly.





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RETRO-SPECTIVE

Everyone's a Critic

TV STARS OF YESTERYEAR TELL US HOW SOME NEW FALL SHOWS MEASURE UP BY MARC BERMAN

We all grew up watching sitcoms and dramas, and in those days formed bonds with some of the characters that livened up those shows. There's no doubt that TV shows are a lot different today. But what do the stars of the shows we grew up watching think of today's programs? We asked some of them to share their thoughts.

Johnnie Whitaker, who played little Jody, one of the three orphaned siblings living with their carefree uncle and his stuffy English butler on 1966-71 sitcom *Family Affair*, is bullish about the WB's upcoming remake. "In today's TV environment it's rare to see a show that the entire family can watch together," says Whitaker, who is hoping to guest-star on the series. "People by now must be tired of a TV landscape filled with filth, murder, gangs and blood. And I have to believe viewers on the WB who watch *7th Heaven* will welcome this wholesome family series."

Susan Olsen, a.k.a. Cindy of *The Brady Bunch*, offers a different take on remaking a classic. "I honestly can't imagine how redoing *Family Affair* will work," she believes. "What was sweet and enduring 30 years ago might seem stale by today's TV standards."

One new sitcom Olsen does have high hopes for is ABC's *8 Simple Rules*. "Anything with John Ritter has to be worth watching," she notes. "Only, I hope the producers don't make the mistake most current family comedies do and treat the kids like clichés. No matter what you say about *The Brady Bunch*, the one thing we always had was mutual respect. The kids were never the butt of the jokes."

Bill Mumy (formerly Billy), who is best remembered as young Will Robinson on 1965-68 classic *Lost in Space*, is impressed how far science fiction has come since then. "Visually, the genre has improved dramatically," he explains. "And the stories told on shows like *The X-Files* and *Buffy the Vampire Slayer* prove it's more than just costumes and special effects. One new sci-fi show I'm curious to check out is *Firefly* on Fox."

Although aliens were the furthest things from 1972-81 feel-good drama *The Waltons*, TV's most affable big brother, Richard Thomas—who is returning to the small screen on the Pax TV series *Just Cause*, which premiered last night—considers family dramas today less of a slice of



About 8 Simple Rules: "Anything with John Ritter has to be worth watching." SUSAN OLSEN

Olsen as Cindy Brady (above, in pink) and today

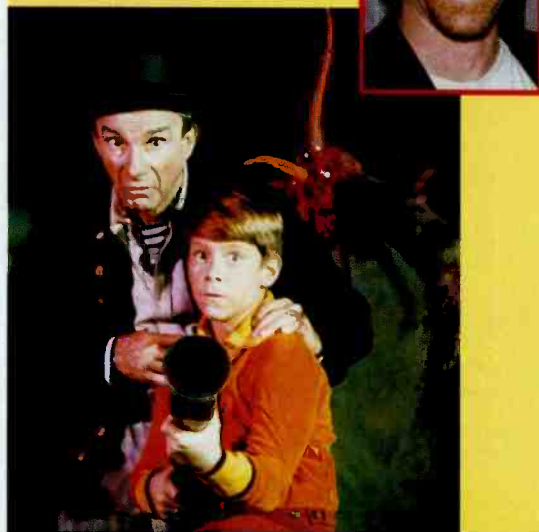
reality. "*The Waltons* was about remembering childhood; a memory piece that owes its roots to shows like *Gunslinger* and *Bonanza*," says Thomas. "Although I've often heard *7th Heaven* described as this generation's version of *The Waltons*, family dramas today are more about presenting an image than telling a story."

Looking to capitalize on the success of *7th Heaven*, the WB will introduce a new family drama, *Everwood*, starring Treat Williams as a recent widower and neurosurgeon who moves his children from Manhattan to a small town in Colorado. "Because *The Waltons* really was TV's first ensemble drama, our core family of 11 people plus about 10 other ongoing characters gave us the luxury of endless stories to tell," argues Thomas. "*Everwood* may not have that advantage."

Another genre that's maintained a strong presence in prime time over the year is the hospital drama. This fall, two new medical dramas, ABC's *MDs* and CBS' *Presidio Med*, will air head-to-head Wednesdays at 10 p.m. Lorna Luft, who appeared in the final 1985-86 season of CBS' *Trapper John, M.D.* and reached a career zenith as producer of last season's Emmy-winning miniseries *Life With Judy Garland: Me and My Shadows*, has a particular interest in *MDs*.

"I like the idea of two renegade doctors who fight the system—it reminds me of Hawkeye and Trapper John from *M*A*S*H*," says Luft. "And unlike *M*A*S*H* or *Trapper John*, there is more creative freedom today in the types of stories you can tell. When we featured a patient suffering from AIDS, the censors went ballistic. Since *Trapper John*—even in the last five years—TV has come a long way, and I am really looking forward to some new scripted series. Enough with that Anna Nicole already!"

"Visually, the sci-fi genre has improved dramatically. One new show I'm curious to check out is *Firefly* on Fox." BILL MUMY



Child star Mumy with Jonathan Harris on *Lost in Space*

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August Magazine Revenue Up, Pages Down

Magazine ad revenue was up in August compared to last year, but ad pages among the top 12 categories remained down, according to Publishers Information Bureau. Revenue increased 2.7 percent, while pages for the month decreased 5.8 percent over last year. For the year, revenue remained flat and ad pages closed down 8.3 percent. The financial, insurance & real estate and drugs & remedies categories saw gains. Losses were most notable in retail, apparel & accessories and media & advertising.

Koten Takes Helm at Inc.

John Koten, who left *Worth* in May after 10 years as editor in chief, last week took the top edit post at Boston-based 680,000-circ *Inc.*, published by G+J USA. Prior to joining *Worth*, he spent 15 years at *The Wall Street Journal*. Koten also helped launch *Smart Money*, a joint venture of Dow Jones & Co. and Hearst Magazines. He succeeds longtime editor George Gendron (who left to start his own consulting business) and will report to president/CEO Dan Brewster.

Cumulus Pulls Out of Mich. Deal With Wilks

Cumulus Media, owner of some 250 radio stations in midsize markets, will not proceed with its deal to purchase five stations in Saginaw, Mich., from Wilks Broadcasting for \$55.6 million in cash. The acquisition, announced in May, would have expanded its coverage in Michigan, where it already owns outlets in Flint and Kalamazoo. CEO Lew Dickey would not say why the deal was cancelled. Cumulus has several pending acquisitions, including one announced in June for the top radio cluster in Macon, Ga., from U.S. Broadcasting for \$35.5 million.

U.S. Open Finals Are Mixed Double for CBS

CBS Sports' coverage of the U.S. Open tennis tournament recorded an average overnight household rating/share of 3.5/8, up 6 percent from last year's 3.3/8 and CBS' best overall two-week ratings for the Open since 1999, when the network's coverage averaged a 4.1/10. The men's final on Sunday, Sept. 8, between Pete Sampras and fellow American Andre Agassi, extended into prime time and earned an overnight rating of 7.9/15, up 44 percent from last year's final between Sampras and Australian Lleyton Hewitt. The men's-final rating was the highest since the

8.0/17 of 1990, when Sampras defeated Agassi for his first Grand Slam title. However, the Open's women's final, played for the second consecutive year in prime time and again featuring Serena Williams vs. sister Venus, fell off sharply. The Sept. 7 prime-time telecast recorded a 4.8/9, with 7.3 million viewers watching, down 29 percent from the 6.8/13 last year, when 10.3 million watched.

Wing Upped at VNU Unit

Andrew Wing was promoted last week from managing director of entertainment for AC Nielsen to president and CEO of sister VNU unit Nielsen Entertainment, which includes Nielsen Broadcast Data Systems, Nielsen Retail Entertainment Information (Nielsen SoundScan and VideoScan) and Nielsen EDI. Wing will be responsible for growing the division's entertainment businesses in the U.S. and internationally, as well as developing new products and services by partnering with other VNU assets. VNU is the parent company of *MediaWeek*.

Cartoon Buys Rights to Fox's Futurama

Cartoon Network has purchased the exclusive rights to *Futurama*, beginning in 2003. Distributed by 20th Century Television, *Futurama* will join the "Adult Swim" block targeting adults 18-34. The deal gives Cartoon the right to air all 72 episodes of the Fox series, which tells the story of Philip J. Fry, a pizza-delivery boy who is frozen in 1999 and thaws 1,000 years later.

Focus on Fashion for Style's New Series

E! Entertainment spinoff network Style is launching two new series this month. *Style Star*, which puts the spotlight on celebrities who are setting fashion trends, will premiere Sept. 22 at 10 p.m. The show will continue to air on Sundays at 9 p.m. *Fashiontrance*, an hour-long show that gives a front-row view of the runway at various fashion shows, premieres Friday, Sept. 20, at 10 p.m. Style counts 24 million subscribers, with commitments to reach more than 40 million by 2004.

Chicago Tribune Aims Younger With Q

The *Chicago Tribune* on Sept. 15 launched a new younger-skewing section in its Sunday edition called Q. Replacing the Sunday Health & Family section, Q mixes it up with short items on people, fashion, entertainment, health and fitness, ethics and more. ■

American Business Media will present a **Publishers Roundtable** Sept. 19 at the Hotel Monaco in Chicago. Topics will include sales motivation and compensation, and revenue-generating editorial extensions. Contact: 212-661-6360.

Adweek Conferences in association with Shoot magazine will present **Adweek's 28th Annual Creative Seminar** Sept. 19-20 at the Hyatt Regency Lake Las Vegas Resort. Keynoter will be Mike Hughes, president/creative director of The Martin Agency. Contact: 888-536-8536.

The National Association of Broadcasters will present the **Hundred Plus Exchange**, a conference addressing the needs of small-market broadcasters, Sept. 20-22 at the Pointe South Mountain Resort in Phoenix. Contact Carolyn Wilkins at 202-429-5366 or cwilkins@nab.org.

The **National Association of Minorities in Communications** will present its annual conference, this year themed *The Digital Connection: Creating a World Without Boundaries*, Sept. 23-24 at the Millennium Broadway Hotel in New York. Conference co-chairs are Chuck Dolan, chairman, Cablevision Systems Corp.; and Anne Sweeney, president of Disney Channel Worldwide and ABC Cable Networks Group. Contact: 212-838-2660.

Interep and Spanish Broadcasting System will host the **"Power of Hispanic Radio" symposium** Oct. 4 at the Grand Hyatt Hotel in New York. Contact: Jane Sperrazza, 212-916-0524.

The **Advertising Research Foundation** will hold a series of **workshops** focusing marketing and media effectiveness Oct. 7-10 at the New York Marriott Marquis. Contact: 212-751-5656.

The **Folio:Show**, covering the state of the magazine industry and addressing key concerns of editors and publishers, will be held Oct. 28-30 at the Hilton New York. Ed Needham, managing editor of Wenner Media's *Rolling Stone*, will deliver opening-day luncheon keynote. Contact: 917-981-2937.

G4 TV 4 Gamers

EB Games

Top 10 Best-Sellers

1. Madden 2003 (PS 2)
2. Dead to Rights (XBox)
3. The Thing (PS 2)
4. Buffy the Vampire Slayer (XBox)
5. NFL 2K3 (PS 2)
6. NFL 2K3 (XBox)
7. Street Hoops (PS 2)
8. Medieval: Total War (PC Games)
9. Madden NFL 2003 (XBox)
10. Street Hoops (XBox)

G4 Viewers

Top 10 Female Fighters

1. Tina (DOA 3)
2. Kasumi (DOA 3)
3. Helena (DOA 3)
4. Ivy (Soul Caliber)
5. Sophitia (Soul Caliber)
6. Nina (Tekken IV)
7. Mai (Capcom vs SNK)
8. Chun Li (Street Fighter)
9. Morrigan (Darkstalkers)
10. Christy (Tekken IV)

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The Hollywood Reporter's Box Office

For weekend ending September 8, 2002

THIS WEEK	LAST WEEK	PICTURE	3-DAY WEEKEND GROSS	DAYS IN RELEASE	TOTAL GROSS SALES
1	1	Signs	17,043,114	32	195,582,456
2	4	My Big Fat Greek Wedding	14,809,546	17	82,556,992
3	2	XXX	13,109,119	25	123,876,260
4	3	Spy Kids 2	8,275,600	27	70,051,675
5	New	FearDotCom	7,087,457	4	7,087,457
6	7	Austin Powers: Goldmember	7,069,386	40	203,471,220
7	5	Blue Crush	5,569,455	18	34,712,525
8	6	Serving Sara	4,385,699	11	11,949,391
9	13	The Good Girl	3,804,818	27	7,544,746
10	11	Road to Perdition	3,529,984	53	99,332,314

Source: The Hollywood Reporter

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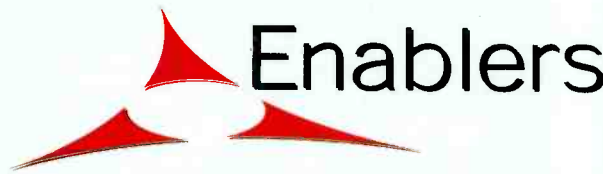
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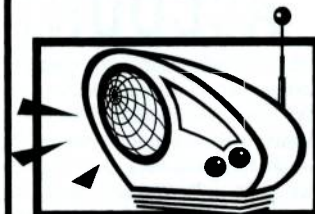
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Movers

TV STATIONS

Veteran ABC executive **Bernie Prazenica** has been promoted to president and general manager of ABC Stations Group's WTVD-TV in Raleigh-Durham, N.C. Prazenica has spent more than two decades with ABC, most recently as director of sales for ABC's WPVI-TV in Philadelphia. At WTVD, he succeeds **Valari Dobson Staab**, recently named president/gm of ABC-owned KGO-TV in San Francisco...**Michael Brooks** was named general manager of Opelika, Ala., station WWSW-TV, owned by Pappas Telecasting. He had been gm at Fox affiliate WBAK in Terre Haute, Ind.

AGENCIES

Seattle-based Sedgwick Rd. has hired **Joe Huber**, formerly vp/associate director of broadcast at Evans, Hardy + Young in Santa Barbara, Calif., as vp/local broadcast manager.

MAGAZINES

InStyle has named **Remy Kothe** and **Kym Blanchard** co-associate publishers, replacing Stephen Jacoby, who left to pursue personal interests. Kothe had been marketing director at the Time Inc. monthly and Blanchard was associate publisher at *Essence*...**Jack Griffin** was promoted from president to publisher of Sunday-magazine *Parade*. Griffin will continue to oversee ad sales, newspaper relations, marketing, research and interactive media...*Science* and pop-culture quarterly *Seed*, published by Warner Publisher Services, has appointed **Alan Stiles** associate publisher. Stiles was most recently associate publisher at *Red Herring* and, prior to that, publisher of *Esquire*...At American Express Publishing's *Travel + Leisure*, **Anthony Cennamo** was promoted from fashion advertising director to New York advertising director, a new position.

RADIO

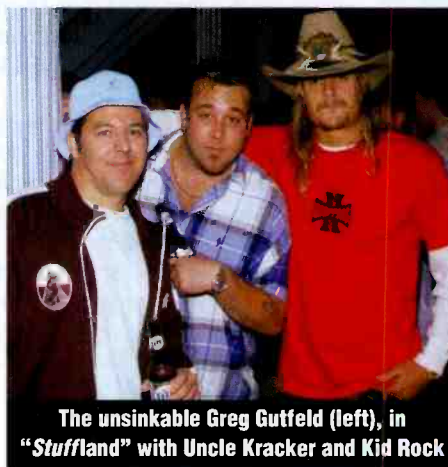
Glenn Leeder was named executive vp for AMF Radio Networks, a new division of Birach Broadcasting Corp. He had been vp of affiliate relations for ABC's Radio Disney...**Robin Smith** was named vp and CFO for Backyard Broadcasting. Smith had been vp of finance for television at Sinclair Broadcast Group.

Media Elite

EDITED BY ANNE TORPEY-KEMPH

Quicktakes

STUFF ASSOCIATE EDITOR ARIC WEBB made a splash at the mag's recent "Stuffland" party in New York's Hamptons beach enclave. Webb was a sitting duck in the early round of the charity Dunk Tank, where partygoers paid \$25 for three chances to knock *Stuff* execs into a tank of frigid water. But when the time came for editor in chief **Greg Gutfeld** to get tanked, he was MIA. "I don't like water," he said. "It gets me all wet." He'd actually gone home to dry out from the persistent rain and libations. Gutfeld's replacement, J.C. Chasez of N'Sync, got sunk several times, and the money raised went to the Mark Wahlberg Youth Foundation...**Doug "The Greaseman" Tracht**, the colorful, 30-year veteran radio personality who was fired from Infinity Broadcasting's WARW-FM in Washington, D.C., three years ago for a racist on-air remark, is about to try syndication again. Tracht went back on morning air recently on Birach Broadcasting's WGOP-



The unsinkable Greg Gutfeld (left), in "Stuffland" with Uncle Kracker and Kid Rock



Off the wall, back in business: Tracht

AM in suburban D.C., and last week Birach announced it has formed a new network division, AMF Radio Networks, for the specific purpose of launching the Greaseman into syndication. Eight new affiliates, including Michigan stations WCXI-AM/FM serving suburban Detroit and WMFN-AM in Grand Rapids (both owned by Birach) have already been signed... Relations just got delightfully chilly between Palace Sports and Entertainment and the **St. Petersburg (Fla.) Times**. Capping a three-year partnership with the Tampa-area

daily, Palace is renaming its Tampa Ice Palace the St. Pete Times Forum, making the *Times* the first newspaper in the nation to have its name splashed across a major sports and entertainment arena. Besides being the home of the NHL's Tampa Bay Lightning, the Forum will host the early rounds of the NCAA men's basketball tournament next March. *St. Pete Times* editor **Paul Tash** is rooting for Indiana (his alma mater) to be a contender...Corporate IQs will be on the line later this month at the **4th Annual Brain Game**, sponsored by The Advertising Club and *Reader's Digest* to determine the "Smartest Company in New York." Among those signed up to play this year: Bozell, MVBMS/Euro RSCG, American Express Publishing and *Guideposts*, last year's winner. Categories for the *Jeopardy!*-style trivia questions will include advertising, *Reader's Digest* (money talks), New York, movies and geography. *New York Times* advertising columnist Stuart Elliott will preside. Call 212-533-8080, ext. 212, for info...With the bottom line in mind, **Peter Tortorici** cast himself in a cameo role in tonight's premiere of his Pax TV show, *Body & Soul*. "My [fee] apparently fit the bill," said Tortorici, executive producer of the new medical drama and formerly president of both CBS Entertainment and Telemundo. The budget-minded producer is equally tough as an editor: He left his one speaking line on the cutting-room floor. ■

Media Elite

Spotlight On...



Hank Steinberg, Creator and Co-Executive Producer, CBS' *Without a Trace*

During Hank Steinberg's first two years at the University of Pennsylvania, he wanted to be a sports-writer, but a trip to Europe during his junior year got him thinking he should broaden his horizons beyond sports. So after graduation in 1991, he headed west to Los Angeles, only to find a job handling PR for a sports-themed movie, *The Mighty Ducks*. Steinberg tried some script writing but says it took him about five-and-a-half years to hook up with an agent "that meant something." After writing a miniseries script that was developed but never aired, in November of 1997 he pitched HBO about doing a story on the relationship between Mickey Mantle and Roger Maris during the 1961 season, when Maris broke Babe Ruth's single-season home run record. HBO went for the pitch, bringing in Billy Crystal as executive producer of the project, which aired last year with the title '61. "He brought great passion to it," Steinberg

says of Crystal. "It was a great collaboration."

With the itch to continue doing TV projects, Steinberg approached CBS execs, who put him in touch with moviemaker/TV producer Jerry Bruckheimer, whose company had the hit CBS series *CSI: Crime Scene Investigation*. The Bruckheimer people had the idea of a unit that finds missing persons, and Steinberg came on board to write the pilot episode of *Without a Trace*, the new series on CBS, which premieres Sept. 25. Steinberg has also written the second episode, and beyond that will work with a writing team of seven, polishing each episode.

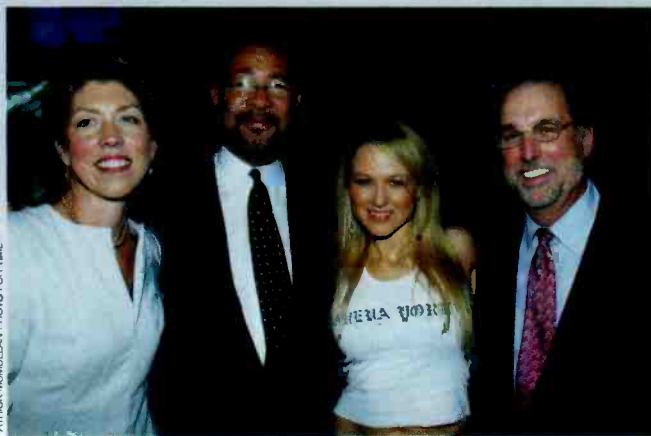
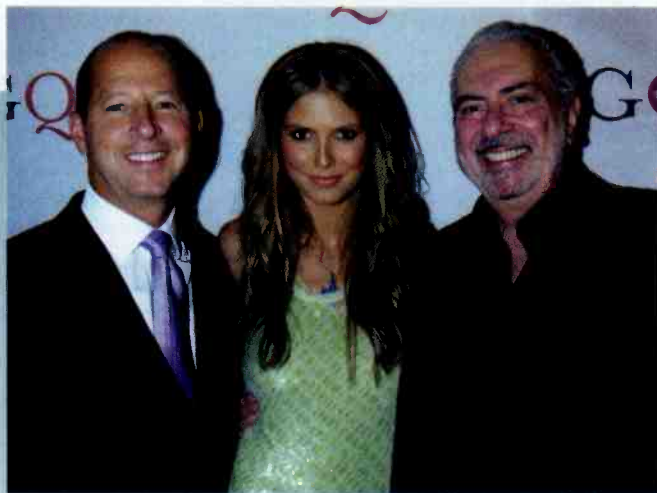
Is Steinberg concerned about launching into a crowded field of new and returning crime dramas on the air this season? "We're just going to focus on doing the best job we can and try and make it interesting and unique," he says. "Hopefully the audience will find us." —John Consoli

Media Dish



Architectural Digest recently treated clients to an evening of theater at the new Broadway musical *Hairspray*. Backstage, AD vp/publisher Amy Churgin chatted with the show's choreographer, Jerry Mitchell.

At the recent 45th-anniversary bash for Conde Nast's *GQ*, a star-studded affair held at the *GQ* Lounge at New York's Pressure club, (l. to r.) *GQ* vp/publisher Ron Galotti, model Heidi Klum and *GQ* editor Art Cooper



Time magazine marked the one-year anniversary of 9/11 with an encore presentation of its Faces of Ground Zero exhibit, titled "A Tribute to America's Heroes," at Rockefeller Center in New York. (L. to r.) *Time* president Eileen Naughton; AOL Time Warner CEO Richard Parsons; singer Jewel; and Bob Scott, president of event sponsor Morgan Stanley.

PATRICK MULLAN PHOTO FOR TIME



MEDIA OUTLOOK

2003 - A NEW ERA BEGINS

A SPECIAL REPORT

From the Editors of *MEDIAWEEK*
Appearing in *MEDIAWEEK* • *ADWEEK* • *BRANDWEEK*

Issue Date: September 30, 2002

Never has the media world faced an uncertain future with so many unanswered questions. Never has change been more rapid.

SuperBrand advertisers are experimenting with new media mixes and new formulas for marketing success. Media buyers and planners are facing new challenges. Consumer reading times, viewing times, listening times and time spent online are being closely watched. The efficacy of online advertising is being re-examined.

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ADWEEK MAGAZINES

What's the Deal?

Magazine acquisitions have slowed this year, as lenders are skittish about ad-driven media

FOR MANY ACQUISITIVE PUBLISHING EXECUTIVES, 2002 HAS BEEN A RELATIVELY QUIET year so far, as continued uncertainty about the economy and tight-fisted banks have slowed the pace of deals. Prospective buyers, who generally cobble deals together with a combination of private equity financing and

bank loans, have found it difficult to wrest sufficient funds from skittish bankers, who are wary about investing in advertising-driven media properties. Leveraging magazine deals in this climate has become more complicated than getting elected in Florida.

In addition, the soft economy has pressured the valuations of many assets downward, making them less attractive for a sale. Magazine multiples (the ratio of earnings before interest, taxes, depreciation and amortization used to determine the value of a company) have fallen by as much as 20 percent in the past few years, according to media investors DeSilva & Phillips, and many prospective sellers have not

seeking media properties related to health and fitness. "There have been a lot of busted deals, where sellers have not been able to get the price they were looking for," Klein says.

"You are still seeing [sellers] coming off what was essentially a bubble," adds Mark Edmiston, managing director of AdMedia Partners, an investment banking firm. "They are still remembering the great prices of a couple of years ago and are reluctant to sell."

While there have been fewer magazine deals done this year, the average value of acquisitions made is way up, says Roland DeSilva, managing partner of DeSilva & Phillips. In the first half of 2001, there were 62 deals in maga-

notes, "the properties [that have been sold] are quality properties that have been able to withstand the intensive due diligence of the buying universe."

Major magazine deals so far this year have included the sale of Primedia's Modern Bride Group to Condé Nast Publications for \$52 million and the sale of the 400,000-circulation Southern shelter bimonthly *Veranda* to Hearst Magazines for a reported \$40 million.

"We look at everything," says Hearst Magazines president Cathie Black, who declined to discuss details of the *Veranda* deal. "For the past five to eight years, we have felt that most of the available properties have been so unbelievably overpriced that there are few things we have big regrets over not getting. You have to say, 'Am I going to make my money on this investment?' And if you overpay, you're never going to do it." —LG

Bunny Energizer

Playboy taps Maxim veteran

The lads have it—if Hugh Hefner and Jann Wenner's new hires are any indication.

Last week, Playboy Enterprises tapped *Maxim* executive editor James Kaminsky as editorial director, following closely on the heels of Wenner Media's wooing of *FHM*'s Ed Needham to become managing editor of *Rolling Stone*. *Playboy*'s move marks another effort by an iconic men's magazine to draw inspiration from the new wave of young men's titles.

But in hiring Kaminsky, Michael Carr, president of Playboy Enterprises' Publishing Group, insists that the new editorial director will not *Maxim*-ize the venerable monthly. "At the end of the day, the rich content of *Playboy* magazine will not change," Carr says. "It's packaging will alter somewhat. It's like the update of *Tide* every two years—it's new and improved, but it's still soap."

Kaminsky, who starts Oct. 7, will work with Arthur Kretchmer, *Playboy*'s editorial director for the past 30 years, who will retire after the 50th anniversary issue is published in January.

A veteran of the defunct *Condé Nast Sports & Fitness* and Wenner's *Men's Journal*, Kaminsky promises that the only *Maxim* sensibility he intends to bring is the Dennis Publishing monthly's ability to connect with readers. Kaminsky says he will make *Playboy* "a user-friendly read," loaded with lots of access

MAJOR CONSUMER MAGAZINE DEALS, FIRST HALF OF 2002

PROPERTY (SALE DATE)	BUYER	SELLER	PRICE
MODERN BRIDE GROUP (January)	Condé Nast Publications	Primedia	\$52 million
REIMAN PUBLICATIONS (March)	Reader's Digest Association	Madison Dearborn Partners	\$760 million
F&W PUBLICATIONS (March)	William F. Reilly	Richard Rosenthal	\$130 million*
VERANDA (May)	Hearst Magazines	Veranda Publications	\$40 million*

Source: Company reports, *Estimates

been willing to accept lower bids.

Case in point: In May, Primedia tried to sell off its hunting and photography titles. Interested parties included former Times Mirror Magazines chief Efrem "Skip" Zimbalist III, backed by Windpoint Partners. But Primedia pulled the properties off the market when bids reportedly fell far short of the asking price.

Jason Klein, another former top Times Mirror/Time4 Media executive, is another CEO without portfolio. Klein is currently president/CEO of Healthy Living Media (backed by North Castle Partners), which is

zine publishing (excluding those valued at \$500 million or more), including consumer, business-to-business and trade shows, compared to just 37 deals in the same period this year, according to DeSilva & Phillips. But the total value of the 2002 deals was 24 percent greater, totaling \$1.12 billion in the first six months of this year compared to \$903 million in 2001.

"2001 market conditions turned so negative that they forced buyers to re-evaluate their purchase price, and in the vast majority of cases the purchase price dropped," DeSilva says of last year's valuations. This year, he

Mediaweek Magazine Monitor

WEEKLIES September 16, 2002



Kaminisky will add "hot-ticket" writers.

points, more sidebars and additional photographs. The number of *Playboy's* nude pictorials will remain unchanged, though the title will toy with different treatments in lighting and style.

One area Kaminisky will focus on heavily is recruiting new writers. "This magazine has always been known for

beautiful women, and it was known for great journalism in its formative days," he says. "I'd like to use narrative journalism in a way that allows us to compete with everyone from *The Atlantic Monthly* to *The New Yorker*. I don't see why we should take a back seat in terms of hot-ticket journalistic pieces."

The 3.2 million-circulation *Playboy* is being challenged by Dennis Publishing upstarts *Maxim* and *Stuff*, as well as Emap's *FHM*, all of which take a frat-boy approach to entertaining men. The titles have found great success in attracting big celebrity names to pose for photo layouts by leaving some things (though not many) to the imagination.

Playboy's total paid circulation grew 2.1 percent in the first half of this year compared to 2001, although newsstand sales nosedived 25.8 percent, according to the Audit Bureau of Circulations.

Media buyers say they are looking forward to seeing a re-energized *Playboy*. Through September, *Playboy's* ad pages are down 18.2 percent this year, reports the *Mediaweek* Monitor. "The magazine could probably use a little bit of an update," says Jim Poh, director of creative content distribution for Miami-based Crispin Porter & Bogusky, whose clients include BMW's Mini. The lad magazines, Poh notes, "have made *Playboy* look a little outdated." —LG

Living Large

Robb Report's specialty titles

After purchasing and revamping the luxury-lifestyle monthly *Robb Report* just over a year ago, publisher CurtCo Robb Media is preparing to launch several spinoffs that focus more

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek ^X	16-Sep	36.44	17-Sep	74.49	-51.08%	2,099.80	2,680.04	-21.62%
The Economist	7-Sep	40.00	8-Sep	64.00	-37.50%	1,564.00	1,865.00	-16.14%
Newsweek ^{E/X}	16-Sep	36.26	17-Sep	42.15	-13.97%	1,195.54	1,142.95	4.60%
The New Republic ⁴	NO ISSUE		17-Sep	13.83	N.A.	262.85	308.44	-14.78%
Time ^{E/X}	16-Sep	62.38	17-Sep	60.81	2.58%	1,472.99	1,506.62	-2.23%
US News & World Report ^C	16-Sep	31.17	17-Sep	84.49	-63.11%	893.01	984.53	-9.30%
The Weekly Standard	23-Sep	7.65	24-Sep	8.00	-4.38%	317.11	319.85	-0.86%
Category Total		213.90		347.77	-38.49%	7,805.30	8,807.43	-11.38%
SPORTS/ENTERTAINMENT/LEISURE								
AutoWeek	16-Sep	17.76	17-Sep	20.91	-15.06%	833.97	1,024.59	-18.60%
Entertainment Weekly	13-Sep	48.33	14-Sep	43.93	10.02%	1,201.25	1,198.55	0.23%
Golf World	13-Sep	18.83	14-Sep	12.00	56.92%	1,069.87	913.01	17.13%
New York ⁴	16-Sep	24.10	17-Sep	32.50	-25.85%	1,743.70	1,899.80	-8.22%
People ^X	16-Sep	47.62	17-Sep	103.54	-54.01%	2,391.62	2,528.49	-5.41%
The Sporting News	16-Sep	18.17	17-Sep	6.66	172.82%	531.20	436.45	21.71%
Sports Illustrated	16-Sep	38.15	17-Sep	51.33	-25.68%	1,710.01	1,660.10	3.01%
The New Yorker ^S	16-Sep	26.80	17-Sep	103.46	-74.10%	1,382.27	1,473.15	-6.17%
Time Out New York	11-Sep	65.19	12-Sep	65.88	-1.04%	2,369.85	2,403.45	-1.40%
TV Guide	14-Sep	81.99	15-Sep	108.39	-24.36%	1,567.56	1,938.96	-19.15%
US Weekly ⁴	16-Sep	26.83	17-Sep	34.83	-22.97%	695.32	676.19	2.83%
Category Total		413.77		583.43	-29.08%	15,496.62	16,152.74	-4.06%
SUNDAY MAGAZINES								
American Profile	15-Sep	8.75	16-Sep	9.20	-4.89%	312.58	307.20	1.75%
Parade	15-Sep	15.92	16-Sep	15.83	0.57%	445.28	411.92	8.70%
USA Weekend	15-Sep	16.47	16-Sep	10.38	58.67%	435.16	403.24	7.92%
Category Total		41.14		35.41	16.18%	1,193.02	1,122.36	6.50%
TOTALS		668.81		966.61	-30.81%	24,494.94	26,082.53	6.89%

C=9/17 is Best Colleges Guide special issue; E=estimated page counts; S=9/17 is Style special issue; X=YTD 2001 includes an out-of-cycle issue; 4=four fewer issues in 2002 than in 2001

specifically on upscale pursuits like private aviation, yachting and home theater systems.

First out the gate will be the Oct. 8 launch of *Robb Report Home Entertainment & Design*, a 100,000-circulation magazine that will cover high-end audio-visual equipment, including home theaters valued at \$200,000 or more. Available on newsstands for \$5.99, the title will publish bimonthly beginning with a February/March issue. The next spinoff, which may happen via an acquisition, is also expected in the first quarter.

"The [subjects] addressed by *Robb Report* as a whole have no publications positioned clearly at the highest end of the market," says William Curtis, CEO of CurtCo Robb Media, on why he thinks this realm of luxury niche publishing will work.

At least one buyer seems to agree about the first project. "Two things have had massive growth in this economy for people of affluence—kitchens and home theaters," says Mike McHale, Optimedia group media director.

Since *Robb Report* and sibling *Showcase* were purchased for \$35 million in June 2001 from Luxury Media, Curtis has sought to strengthen the *Robb Report* brand among the country's wealthiest sector. *Robb Report* has raised its ad-page rate by nearly 50 percent to \$17,890, slashed 40 percent of its advertisers and added high-end business from the likes of Gauthier jewelry and Aston Martin. "We're running less

ad pages but making more money," notes Ernie Renzulli, *RR* publisher. Ad pages are expected to close the year down 28 percent to 1,150, Renzulli says.

On the circulation front, *RR's* total paid circulation through June grew 5.7 percent over last year to 105,842, according to ABC. Single-copy sales rose 4.4 percent (even with the \$7.99 cover price).

Despite the solid circ gains, there are indications that *Robb Report* readers' wealth has been on the decline. The median household income of *RR* readers is down 5.75 percent in 2002 to \$147,400 from \$156,400 last year, according to the new Mendelsohn Media Research Affluent Survey.

"We're technically down, but our relative position to other magazines has been maintained," says Andrew Clayton, CurtCo Robb Media media research manager. Clayton estimates the average *RR* reader's annual income at \$1.25 million. The Mendelsohn survey "is a measuring stick to use for comparison to other magazines, but not representative of our true reader," he says. —Aimee Deeken



Robb Report's first spinoff looks at pricey toys.

Media Person

BY LEWIS GROSSBERGER



All Fall Down

WELL, A NEW SEASON IS HERE, AND YES, YOU GUESSED IT, IT'S fall, also known in more refined circles as autumn. Every fall, Media Person provides you with guidance in the form of capsule reviews of the most exciting new TV shows soon to premiere. And every fall, despite

Media Person's best efforts, these shows all turn out to be garbage, and you turn on MP and hurl terrible imprecations at him even though IT'S NOT HIS FAULT. Are we clear on that? Because here we go again.

Hack (9 p.m. Fridays, CBS): Philly cabbie Mike Olshansky isn't just any old Philly cabbie. He's a tough, angry, disgraced ex-cop, which means only one thing: Every single passenger is going to have a problem that Olshansky will solve by kicking them in the groin or telling them off in no uncertain terms, or both. One problem: When it rains, you won't be able to find this show anywhere.

CSI: Miami (10 p.m. Mondays, CBS): The cadaver cops in this spinoff will have to be better than their brethren in the original *CSI* because many Floridian corpses have been chewed by alligators or decomposed rapidly in the high humidity. Fortunately, David Caruso and Kim Delaney, veterans of *NYPD Blue*, where they learned how to be really intense, as well as how to rapidly whip their clothes off in an emergency, will be on hand.

Robbery Homicide Division (10 p.m. Fridays, CBS): When Michael Mann created *Miami Vice*, everyone said, "Sure, vice cops in Miami, that's pretty good, but why doesn't this guy do a show about robbery-homicide cops in Los Angeles? Because frankly, we just don't have enough cop shows." Your wish has come true.

In-Laws (8 p.m. Tuesdays, ABC): Dennis Farina is back, but oddly enough, he's not a tough cop, he's a tough father-in-law. Unfortunately, he has trouble adjusting to bland sitcom family life when, in the first episode, annoyed with his son-in-law (Eminem), he shoots him six times in the chest.

Without a Trace (10 p.m. Thursdays, CBS): Yet another exciting cop show. The

FBI's Missing Persons Squad strives each week to find beloved actors from old series who have mysteriously vanished. For instance, where is Daniel J. Travanti of *Hill Street Blues*? Well, in the premiere, he is tracked down in Mexico, running a laundromat with Gabe Kaplan.

Girls Club (9 p.m. Mondays, Fox): Just because this extravaganza was dreamed up by David E. Kelley, a lot of people just can't seem to write about it without making some snarky reference to *Ally McBeal* or *The Practice*. But it's completely different. Whereas the latter two were built around good-looking young people arguing cases for law firms and having affairs, *Girls Club* is about three attractive women in their twenties trying to balance their romantic lives with their legal careers.

It's a drama! It's a game show! It's a mystery! It's a moody, cultish rip-off of *Twin Peaks*! No, it's all four!

Birds of Prey (9 p.m. Wednesdays, WB): Three fine-looking young babes are laid off from David E. Kelley's law firm but are quickly able to land jobs in the burgeoning crime-fighting field. Tooling about the shadowy, menacing, underlit metropolis of New Gotham, they discover that they're second-generation batpersons, which gives them license to run around in their underwear and battle supervillains while striking sexy poses. Of all the great new shows he intends to never watch, this is Media Person's favorite.

No, wait, Media Person just found out about **Dinotopia** (8 p.m. Thursdays, ABC).

This is his favorite. Two teenage half-brothers and their millionaire father crash-land in a mysterious lost world where humans and dinosaurs coexist. Finding the huge creatures to be intelligent and friendly, they open a meat-packing plant and grow rich selling dinoburgers to McDonald's.

Haunted (9 p.m. Tuesdays, UPN): Matthew Fox, whoever he is, plays an edgy detective with soul. Oops, sorry, make that a soulful detective with an edge. Ever since having a near-death, out-of-body experience during a meeting with his agent, he has been able to see ghosts. Unfortunately, since he's assigned to the pickpocket squad, he has no opportunity to use his unique talent in his work and is soon confined to a mental institution.

Push, Nevada (9 p.m. Tuesdays, ABC): It's a drama! It's a game show! It's a mystery! It's a moody, cultish rip-off of *Twin Peaks*! No, it's all four! Viewers, if there are any, are invited to try to stay awake and figure out the clues as an IRS agent tries to penetrate the secrets of Push, where somebody has stolen a million bucks. A viewer can win the money

in this interactive drama and then receive a visit from the IRS agent himself, who will take most of it back.

Firefly (8 p.m., Fridays, Fox): Navigating the farthest reaches of the galaxy to escape the fascist Nebular Wrestling Commission, Captain Rufus T. Firefly (Michael Jackson) pilots a rickety old spaceship with a mercenary crew composed of attractive actors. Trying to make a buck by trading high-quality narcotics (perfectly legal in the 86th Century), they must elude the Critics, a fierce race of flesh-eaters, as well as cast members trying desperately to escape from other shows. ■

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MEDIAWEEK SEP 16, 2002