MEDIAWEEK

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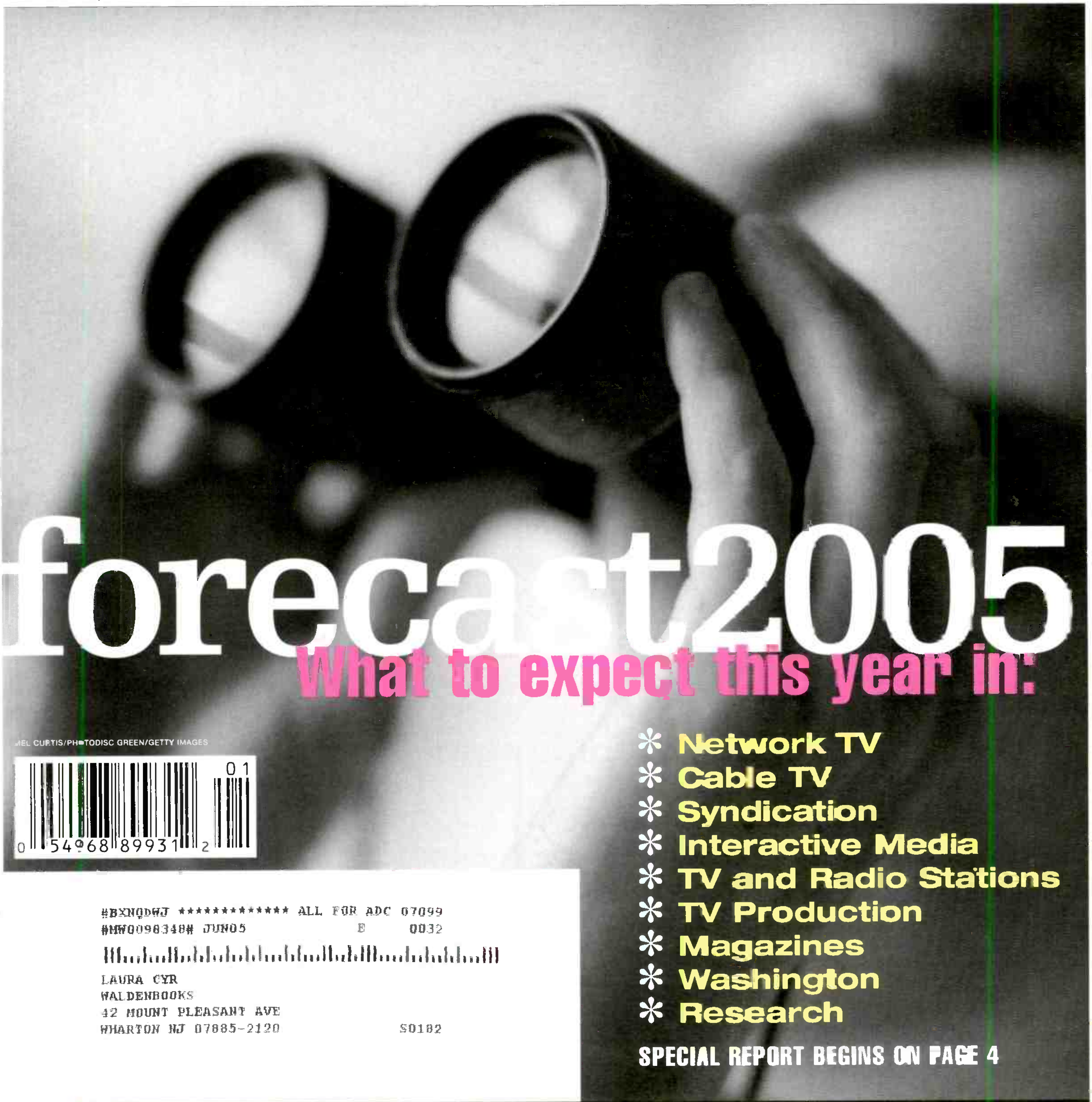


forecast2005

What to expect this year in:

…IEL CURTIS/PHOTODISC GREEN/GETTY IMAGES

- Network TV
- Cable TV
- Syndication
- Interactive Media
- TV and Radio Stations
- TV Production
- Magazines
- Washington
- Research

SPECIAL REPORT BEGINS ON PAGE 4

At Deadline

INFINITY'S SYKES EXPECTED TO STEP DOWN

After much speculation, John Sykes may soon be on his way out as CEO of Viacom's Infinity Broadcasting, a position he has held since March 2002. Joel Hollander, who was named president/COO of Infinity in May 2003, is believed to be the leading candidate to succeed Sykes. An announcement is expected by or before Jan. 20, when Infinity holds its managers' meeting, according to sources familiar with the situation. Sykes, who prior to Infinity served as president of VH1, is likely to take a new management position within Viacom.

NBC: *L&O's JURY* WILL PROCEED AS PLANNED

NBC will go forward with upcoming drama *Law & Order: Trial by Jury* despite the passing on Dec. 28 of star Jerry Orbach, who died of prostate cancer at the age of 69. Orbach was slated to continue in his 12-year role as Det. Lennie Briscoe on the spinoff series. "While Jerry is irreplaceable, *Law & Order: Trial by Jury* is an ensemble and will continue in production," an NBC statement said. "A new member will join the company." Six episodes of *Law & Order: Trial by Jury* have already been filmed.

A&E PREPS HISTORY SPINOFF

A&E Networks' The History Channel has announced the spring 2005 launch of the Military History Channel. The move follows last November's news that Discovery Networks is rolling out a similarly themed channel by renaming Discovery Wings the Military Channel on Jan. 10. While military-themed programming will remain on THC's schedule, executives said A&E's new network provides a destination for the hardcore military history fan. The channel will borrow from The History Channel's extensive library of military history programming, which now accounts for about 25 percent of the schedule, but will also showcase original fare.

SPIKE TV, INFINITY LAUNCH RADIO NETWORK

Viacom's Spike TV and Infinity Broadcasting announced the launch of Spike Radio, a network devoted to male listeners much like the TV channel targets male viewers. On Jan. 3, the Las Vegas station KSFN-AM will launch as Spike 1140 AM–Radio for Men. The programming lineup for Spike 1140 includes local personalities Tom Leykis, Don and Mike and *The Big Johnson Show*. Sports news and game coverage, including Major League Baseball's Los Angeles Dodgers, USC Trojan football and *NFL Doubleheader Sunday*, will also be a part of the schedule, in addition to segments on health, fitness and lifestyle.

OLYMPICS COMPLAINTS POSTED ON FCC SITE

Three of the eight people who complained about Summer Olympics broadcasts on NBC said they heard the F-word during coverage of women's beach volleyball. Others complained about male genitalia on a classically styled statue during the opening ceremonies Aug. 13. And still others complained about ads for erectile dysfunction drugs and for NBC's show *Father of the Pride*, according to copies of the complaints posted Dec. 21 on the Federal Communication Commission's Web site. Sources last month told *Mediaweek* the agency was investigating NBC's broadcast.

INSIDE MEDIAWEEK

Market Profile 17

Mr. TV 22

Hot ticket: The return of Tribune's beloved Yule Log was a hit in New York.

YULE LOG WARMS N.Y. TV

The beloved Yule Log, the video of a blazing fireplace accompanied by holiday music on WPIX, Tribune Broadcasting's WB outlet, was once again the New York ratings winner in its time period from 8 a.m. to noon on Dec. 25. The Yule Log also was No. 1 among every key demographic group, including adults 18-34, 18-49 and 25-54. This holiday, 13 other Tribune stations aired the popular video, including Superstation WGN.

ADDENDA: Heading into this week, there are about six 30-second in-game spots left for **Super Bowl XXXIX**, which airs on Fox on Sunday, Feb. 6, with the network holding firm at $2.4 million per 30-second spot...**Ruth Gaviria**, most recently director of Meredith Publishing Group's Hispanic Ventures, has been promoted to publisher and executive director...GSN last week named **Christopher Raleigh** senior vp of advertising sales. Raleigh, who was previously vp of sales at Tech TV, replaces Michael Sakin, who resigned in October...**Nielsen Media Research's** local people meter service became the sole TV ratings service in San Francisco as of Dec. 30. Since Sept. 30, the ratings firm, which is owned by *Mediaweek* parent VNU, had been operating both LPMs and meter/diary service. Nielsen plans to launch LPM service in Philadelphia and Washington, D.C., on April 7.

CORRECTION: A Dec. 9 online story about Air America incorrectly stated that Evan Cohen, the former Air America Radio board chairman, was an investor in the company.

Market Indicators

NATIONAL TV: QUIET
First quarter is the most pre-sold quarter during the season, so most advertisers right now are waiting to see how the networks' new January shows will deliver versus their ratings guarantees.

NET CABLE: SLOWING
There was a flurry of first-quarter spending from the auto and wireless categories just prior to the holidays, but the marketplace is soft overall going into 2005. Scatter activity has slowed to a crawl.

SPOT TV: MIXED
Strong auto in December going into the new year as domestic and foreign dealers push year-end sales to clear the lots for new models. But other categories remain slow, including retail and telecom.

RADIO: OPEN
In keeping with previous years, it's a slow start to the new year. Automotive is still off; retail weak; telecom and financial services sluggish. Lots of inventory available at attractive rates.

MAGAZINES: BUILDING
Publishers this year are anticipating renewed vigor in the domestic auto category thanks to the launch of a new Ford Mustang and the Chevy Cobalt. Telecom may see a boost as a result of wireless mergers, and publishers are hopeful about financial ads.

forecast 2005

Mediaweek explains what to expect this year

While executives and observers of all the major ad-supported media are hoping for a solid year of growth in 2005, only one can safely predict a banner year in ad growth: interactive media, which not only benefits from being the new kid on the block but also keeps creating new revenue streams. The traditional media all have some reason to worry, whether they're entering 2005 with little momentum in the ad marketplace or fearing new technologies that let consumers dictate their own media intake.

The ad marketplace for TV in general is pretty soft, leading many cable networks (and a few broadcasters) to worry they won't be able to build a sufficient head of steam in advance of the upfront. Magazine publishers, on the other hand, winded from years of economic strife, will be looking to any glimmer of hope as a beacon of opportunity. Television and radio stations, which comprise so much of the local marketplace, are girding for a tough year as they come down from the Olympics-and-elections high of 2004.

Judging from 2004, this year should be a fine year for content, though. As the broadcast networks look to build on new hits, and cable and syndication nibble away bigger shares of the audience pie with more original programming, publishers plan to match last year's explosion in new titles.

Regulators have their own set of pressing issues to solve this year, from the transition to digital television to media-concentration concerns. The makeup of Capitol Hill leans toward one party, but there's no guarantee that will translate to unified progress on those issues.

Perhaps busiest will be the research companies, which are feverishly devising new ways to more effectively measure all the media—more than ever, that means measuring them side by side. Herein lies the key to making both traditional and new media more accountable and saleable. But unfortunately for *Mediaweek*'s readers, it may take longer than the next 12 months to see that new media world rendered more clearly by modern research methodology. —*Michael Bürgi*

MEL CURTIS/PHOTODISC GREEN/GETTY IMAGES

network tv

BY JOHN CONSOLI

ISABELLA VOSMIKOVA/FOX

STATION AGENT Fox is betting that its veteran drama *24*, which returns this month, will help reverse its 2004 slide.

THE BROADCAST NETWORKS are cautiously optimistic that 2005 will be another solid advertising year, despite several dark clouds looming on the horizon—among them digital video recorders, threats of government regulation and continued experimentation with alternative media to replace the traditional 30-second TV spot.

Dave Poltrack, executive vp, research and planning for CBS, points out that spending by 19 of the top 20 advertising categories for the broadcast networks was up in third quarter last year—with the entire top 20 spending 15 percent more than in 2003.

"Even if you exclude NBC, to take out the Olympics revenue, the average increase in spending is 7 percent," Poltrack said. "This broad base of increasing network television spending provides the broadcast networks with a very strong foundation going into 2005."

Jon Nesvig, president of sales for Fox, agreed. "Cancellation options have been incredibly light, and while there are some dicey industry issues, there is also a feeling of optimism about the economy," he said. "There are questions about the role of traditional media and its future, but we are still a key part of advertisers' marketing mix."

As the networks enter 2005, they must position themselves for the upfront. NBC has been the first stop for upfront and scatter advertisers to reach adults 18-49 and high-income viewers. This season, most of NBC's dramas and comedies are bleeding 18-49 viewers, and the network is relying too much on reality. If its new midseason dramas don't bring back 18-49 viewers, NBC could be facing an upfront in which it loses significant dollars to CBS and ABC. But Kevin Reilly, NBC entertainment president, calls "January the new September," and believes the network's plan to roll out more than 10 new scripted and unscripted shows before the end of the season gives it as good a shot as any network to reclaim the 18-49 crown.

Conversely, CBS' prime time is pretty much working on every night this season, with the veteran shows on the schedule boosting its adults 18-49 ratings, particularly on Thursdays, which NBC had dominated for years. New Wednesday drama *CSI: NY* has solidly filled another 10 p.m. hole in the schedule, benefiting both the network and its affiliates leading into the local 11 p.m. news.

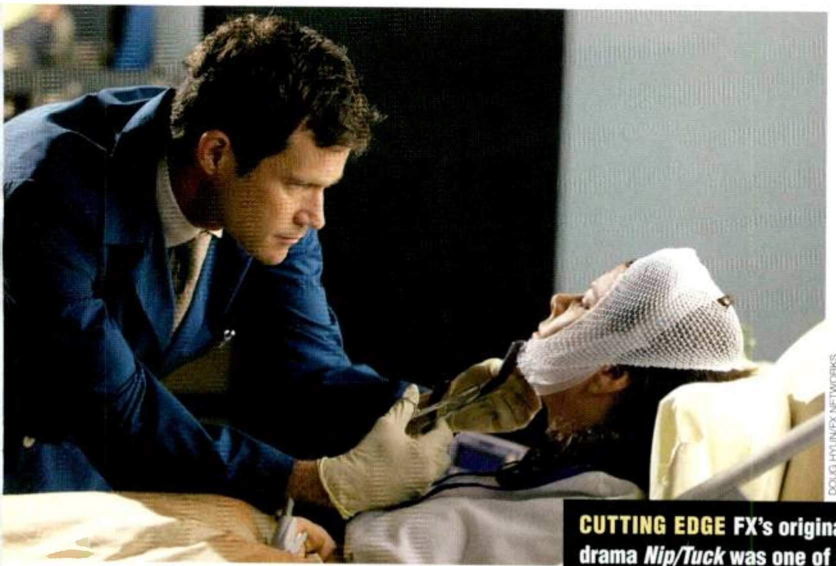
ABC needed to stop several years of losing viewers and pulled it off with *Desperate Housewives* and *Lost*, as well as a moderately successful new reality show, *Wife Swap*. While those shows have gotten ABC a lot of buzz and brought in millions of new viewers, their success is masking some continuing problems. While ABC's midweek sitcoms are producing decent 18-49 ratings, its Friday comedies are in viewer free fall. It also faces the annual task of filling two more hours of prime time in January, with the end of *Monday Night Football*. ABC's fate during the first and second quarters, and how it's seen in the upfront, will depend on its new, and returning, midseason shows.

Although it is down 7 percent in adults 18-49 and 13 percent in adults 18-34, Fox can turn that around beginning in the first quarter. Its hit reality show, *American Idol*, returns in January, as does *24*. Fox also has several new dramas to premiere in first quarter and the Super Bowl on Feb. 6. However, if Fox does not come up with some more drama successes, and if *American Idol* does not meet its huge ratings guarantees, it could find itself with a serious image problem among advertisers heading into the upfront.

The WB has seen a couple of its veteran dramas, notably *The Gilmore Girls* and *One Tree Hill*, grow their 18-34 and 18-49 audiences dramatically this season, providing the network a good base on which to sell its packages. But other than *Reba*, the network is still having trouble getting audiences to watch its sitcoms, and its two freshman dramas, *Jack & Bobby* and *The Mountain*, are struggling. *Summerland*, a hit drama for the network last summer, returns in January, which could boost ratings. The WB remains one of the few places where advertisers can go to reach young female viewers, but new entertainment president David Janollari—now in the midst of his first development season—needs to get buyers excited, or the WB, for the second year in a row, will be forced to take lower cost-per-thousand increases.

UPN is flat across the board in adults 18-34 and 18-49, and in viewers, and that is good, considering the network currently has Nielsen Media Research investigating a mysterious disappearance of black female viewers from its Monday and Tuesday ethnic sitcoms. Those ratings declines have been offset by solid numbers produced by new drama *Kevin Hill* and returning reality hit *America's Next Top Model*. The loss of black viewers—whether an actual loss or some type of Nielsen sampling problem—could become a real stumbling block in the upfront, since many advertisers buy the network for its concentration of black viewers. ■

Senior editor John Consoli covers the broadcast network industry and TV sports.



CUTTING EDGE FX's original drama *Nip/Tuck* was one of several solid performers for cable in 2004.

BY MEGAN LARSON

COMING OFF A SLOW scatter ad market in fourth-quarter 2004 that was also witness to tens of thousands of dollars in first-quarter 2005 inventory cancellations, many cable sales execs are less optimistic about this year's media economy than they were five months ago.

The good news is that cable networks from TNT to ABC Family continue to attract healthy-sized audiences while broadcast networks lose viewers in an increasingly fragmented television landscape. "I am more bullish about TV ad spending in 2005 because I believe people stick to what works, and what works for advertisers is television...And cable has the added bonus of being targeted and more cost-efficient," said Andy Donchin, director of national broadcast buying for Carat USA. "We do look at alternatives and are experimenting with streaming video to cell phones, gaming and outdoor advertising, but we don't want to abandon our bread and butter."

The 2004 upfront was a turning point for basic cable because top-tier networks including USA and Discovery for the first time sold the bulk of their commercial inventory before NBC or CBS even started negotiating with media buyers. "The big story of the year is that more and more people are not seeing cable and broadcast as different silos," said Betsy Frank, executive vp of research and planning for Viacom's cable, film and publishing divisions.

Right up there with *Desperate Housewives* and *Lost*, cable generated real buzz in 2004 with originals including FX's *Nip/Tuck* (which won a Golden Globe nomination for best drama series), TNT's *The Grid*, USA's *The 4400* and Comedy Central's *Chappelle's Show*. One of the most highly anticipated projects for this year is TNT's Steven Spielberg–produced series *Into the West*.

Though the future looks bright for cable in terms of creative output and audience levels, a slowdown in ad spending at the end of 2004 put a dent in many executives' post-upfront optimism. Moreover, Procter & Gamble in November cancelled 25 percent of the first-quarter inventory it ordered in the upfront, drawing attention to the fact that high oil prices affected the cost of raw materials and distribution more than anyone wanted to admit.

"There is more uncertainty," said Bruce Lefkowitz, executive vp of Fox Cable Entertainment Sales. "The upfront was good, but fourth quarter was not as good as people had hoped and networks are less sold going into first quarter." Monterey, Calif.–based Kagan Research projects a 12.6 percent revenue gain for cable, which should bring in about $15.6 billion in 2005.

"You've got a tough comparison because the Olympics and the presidential elections were [last] year," said Derek Baine, an analyst for Kagan Research. "The 2005 growth rate is 1 percent lower than 2004, which isn't great but still pretty good. Cable is still making terrific strides because broadcast networks are still having trouble."

According to Turner's analysis of Nielsen data, the seven broadcast nets on average dipped 4 percent in prime household ratings in '04. "There is a feeling that '05 is not going to be as good as people thought, but scatter has been steady," said David Levy, president, entertainment ad sales/sports for TBS. "If the programming works well and the sponsorships are right, people will come back."

Wireless is expected to remain hot this year. "There are four [cell-phone service providers] left and it is still a real-estate grab," noted Neil Baker, senior vp of ad sales for E! Networks. "They need to shore up customers, and they need to advertise in order to do that." Studios will continue to spend to promote theatrical and DVD releases. Also, competition among auto manufacturers will spur advertising activity in that sector, said Carat's Donchin.

On the distribution front, satellite providers DirecTV and Echostar have made inroads against the top cable companies' subscriber bases by adding almost 2 million new customers through third-quarter '04. That brings their combined sub base to 24 million, said Bruce Leichtman, president of New Hampshire-based Leichtman Research Group. Cable lost video customers to satellite earlier last year but held sub counts relatively steady in 2004 by rolling out digital set-tops capable of high-def TV and video-on-demand as well as high-speed Internet.

The number of digital-cable customers grew to 24 million at the end of third quarter and the number of high-speed Internet users hit about 19 million, according to the National Cable Telecommunications Association. Cable has 61 percent of the 30.9 million broadband users.

As for high-definition television, 90 million homes were ready to receive HDTV as of Sept. 1, 2004, but only 2.3 million households had set-top boxes capable of converting the signals. Cable has an advantage over satellite in this arena because it can deliver local signals in high-def now. "Cable has a year and a half to make the most of high-definition," said Leichtman. "It is their year to win and get ahead with HD." ■

Senior editor Megan Larson covers the cable industry from *Mediaweek*'s Los Angeles bureau.

syndication

BY MARC BERMAN

UNLIKE THE PAST TWO seasons of syndication, which yielded a break-out talk-show hit (*Dr. Phil*, rolled out by King World in 2002) and a steadily building, buzzworthy show (Warner Bros.' *The Ellen DeGeneres Show*, which premiered in 2003), the 2004-05 season so far hasn't produced a standout. Unlike network prime time, which broke the mold with ABC's *Desperate Housewives* and *Lost*, the nearest syndication can come to declaring a hit is Paramount's *Entertainment Tonight* spinoff *The Insider*, which the syndicator is trumpeting as an unqualified success. Its 2.6 season-to-date household rating would indeed be noteworthy if it weren't tied to *ET*, which is averaging a 5.2, according to Nielsen Media Research data.

Of the six new talk shows launched this season, only Buena Vista's *The Tony Danza Show* is likely to return for a second year, and that's because early expectations were low. NBC Universal's *Home Delivery* became the first cancellation casualty of the season, while other freshman talkers are floundering, including Warner Bros.' *The Larry Elder Show* and Sony's *Life & Style* and *Pat Croce: Moving In*.

Nothing spectacular in the new off-network sitcom arena, either. Twentieth's *Malcolm in the Middle*, the highest profile of the bunch this season, pales in comparison to A-list product *Seinfeld*, *Friends* and *Everybody Loves Raymond*.

Upcoming talkers from Tyra Banks (Warner Bros.) and Robin Quivers (Sony Pictures Television) are expected to move into many of the talk-show time periods that will be vacated. *Jane Pauley*, arguably the highest-profile new entry this season, fell short of expectations and is likely to be replaced by NBC Universal's upcoming remake of *Martha Stewart Living* (tentatively titled *Martha*), which is generating the most buzz. (NBC U is also developing a show around financial whiz Suze Orman.) Twentieth Television is attempting to revive *A Current Affair*, in addition to launching familiar-sounding court strip *Judge Alex*. From the looks of these plans, syndicators aren't straying far from the familiar.

The business-side story for syndication is a lot more positive, growing to $3 billion-plus in 2004. According to forecasts from the Syndicated Network Television Association, spending through the third quarter of this year—$2.90 billion—is up 17 percent from the $2.47 billion one year earlier and is expected to remain on the upswing next season. Forecasters are predicting an annual overall increase of an additional 3 percent to 5 percent next season.

"Syndication is a valid, important and necessary ingredient for any advertising buy," said Mitch Burg, president of the SNTA. "Although the broadcasters traditionally get more attention, there are many shows in syndication right now that outrate what's currently airing in prime time, and it's still too early to make final conclusions about the new shows this season. Overall, this remains a healthy medium."

John Rash, senior vp, director of broadcast negotiations at Campbell Mithun, added, "While there is definitely a shortage of new first-run hits, syndication is still a place for innovative marketers to target a specific demographic. Even in a season like this one, where nothing new is finding an audience, shows like *Wheel of Fortune*, *Jeopardy!* and *Oprah* are still so strong—and in some cases growing—the overall business is not negatively impacted."

Rash says that with the National Association of Television Program Executives conference just three weeks away, where syndicators will line up to unveil new shows, "curiosity is expected to initially set Martha [Stewart] apart."

ROSE PROUSER/REUTERS/LANDOV

SHE'LL BE BACK
NBC U is bringing Stewart back to syndication, only this time she will be a combination of Oprah and Rosie.

"In addition to a studio audience and celebrity guests, you will see a more personable Martha," promised producer Mark Burnett, who is heading to daytime for the first time after fueling the red-hot reality genre in prime time. "Consider Martha a combination of Oprah and Rosie O'Donnell, and think of this Martha as the Martha we have come to know and enjoy as a guest on other talk shows. This will be the ultimate comeback story worth telling."

Even if nothing new clicks, syndication's biggest asset will remain the proven longtime hits. In a medium known for fostering first-run winners that last for decades (*Wheel of Fortune*, *Jeopardy!*, *Oprah* and *ET*), the additions of *Dr. Phil* and *Ellen* proved that success in syndication doesn't always rely on riding the coattails of proven hits. It's about finding the right talent and crafting an effective format to showcase it.

"As long as the veteran shows remain healthy, there are no real concerns about the syndication landscape right now," said Rash. "Finding new hits is a bonus but not necessarily a necessity. At least not yet."

Senior editor Marc Berman covers syndication and writes the weekly Mr. Television column and the daily Programming Insider e-newsletter.

interactive media

BY SUSAN KUCHINSKAS

THERE'S NO SHORTAGE OF upside in the world of interactive media in 2005, as several new offshoots of the industry have opened up new avenues of revenue.

Analysts are bullish on interactive spending in 2005, with forecasts of 20 percent to 40 percent growth in online media. Jupiter Research says that spending on online advertising will more than double over the next five years, growing from $6.6 billion in 2003 to $16.1 billion in 2009.

After several years of allocating only experimental ad dollars, most major national advertisers are now shifting budgets from research and development, Web site development and IT infrastructure into marketing budgets targeted to such online media extensions as search engines and behavioral targeting.

Confidence in interactive media is so high that some analysts are even predicting that much-maligned banners and pop-up ads will experience 20 percent to 25 percent increases. The categories with the most room to grow—video ads and content sponsorships—will expand by as much as 40 percent, thanks to increasing broadband penetration.

Jeff Lanctot, Avenue A/Razorfish vp of media, said he expects that "2004 will be seen as the year that consumers really started to consume video online; 2005 will be the year we see advertisers begin to use it online." He pointed to the success of MSN Video, launched in 2004, as a good harbinger of video's expanding role. Jupiter predicts that entertainment advertisers will be among the top spenders this year, and no doubt they'll be among video's early adopters.

Besides media and entertainment, three other industry segments (travel, retail and financial services) will fuel the interactive spending fire in 2005, according to Jupiter Research analyst Gary Stein. "More than 50 cents of every [ad] dollar spent on online will be spent by one of those four industries," he said.

Banks and credit card companies, under pressure to cut costs by moving customers away from their branches and ATMs, will heavily advertise online banking and bill paying to existing customers, while acquiring new ones at significantly less cost.

The boom in travel advertising reflects the growing importance of online bookings. According to Jupiter, the U.S. online travel market accounted for 23 percent of all travel purchased, with a dollar value of $54 billion in 2004. Jupiter expects sales in this sector to be $91 billion in 2009.

The retail sector will continue to lead pay-per-click spending, according to Stein. One reason for its popularity among retailers, he said, is that it's so measurable. "If you have a thing to sell, it's a really solid metric," Stein said.

However, a significant amount of this upside is not flowing through interactive media agencies. It's expected that the white-hot search-engine marketing sector will probably chill slightly to red hot, expanding 25 percent to 30 percent. But those dollars, whether from optimization of Web sites, pay-per-click ads on search results or contextual ads, have tended to be handled by agencies that specialize in search and often provide their own technology.

"When we launched Avenue A/Razorfish's in-house search-engine marketing division, we predicted that agencies would cease outsourcing and that we'd see consolidation," said Lanctot. Carat Interactive followed suit with its acquisition of iProspect, and now, Lanctot added, "We think there will be some smaller moves, but the two biggest players are established."

Interactive media agencies should keep an eye on this sector and either build or acquire expertise in pay-per-click and contextual advertising. "Branding, rich media and broadband connections are good," Stein said, "but that will be a smaller portion of online advertising compared to direct marketing and advertising."

Lanctot said performance marketing—focused on direct response or customer acquisition—will be a battleground in 2005, with direct-response inventory increasingly being outsourced to third-party networks. Performance advertisers may pay a number of ways, including pay-per-click and cost-per-acquisition, but they'll judge the success of the campaign by what it costs to acquire a customer.

"2004 will be seen as the year that consumers really started to consume video online; 2005 will be the year we see advertisers begin to use it online." JEFF LANCTOT

Lanctot said that the importance of search and performance marketing has changed the ways media agencies must do business. The market is more fragmented than ever; Avenue A/Razorfish purchased media in more than 1,000 properties in third-quarter 2004 alone. Technology for tracking and targeting is crucial, and there is greater need for advanced analytics to make sense of all the data that online advertising captures.

"For so long, a lot of traditional agencies hoped that online media and advertising would be managed in the same way as traditional media and advertising," said Lanctot. "We've learned that it is a very different approach that agencies need to take."

And, if those spending projections are in the ballpark, that new approach will pay off in 2005. ■

Susan Kuchinskas is a senior editor for internetnews.com, which, like Jupiter Research, is owned by Jupiter Media.

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THE ADWEEK DIRECTORIES 2005

tv & radio stations

BY KATY BACHMAN

EVEN WITHOUT THE OLYMPICS and political advertising to boost revenue, local TV broadcasters like what they see for 2005. The automotive ad category was strong as December came to a close, and with more model launches on tap for 2005, the prospects for TV's top revenue-contributing category are positive. Telecom and financial services are also stepping up their advertising.

"The economy is finally starting to show some resiliency and strength," said Fred Reynolds, president and CEO of Viacom Television Stations Group. "It's the best outlook I've seen since 2000."

Still, TV stations face increasingly intense competition for the consumers' time. "The biggest ones to watch will be digital video recorders, video-on-demand and handheld devices which are delivering more content," said Chris Rohrs, president of the Television Bureau of Advertising.

One way stations are looking to gain a competitive edge is through exploiting the transition to high-definition. While most network prime-time schedules and national sports events are broadcast in HD, local HD broadcasts have lagged, representing a growth area in 2005. "It will drive more viewership that we can translate into revenue," said Reynolds.

GREGORY HEISLER/CBS

"The world doesn't only work during the week. We've learned through the cable experience that if we leave any void, cable will sell it." FRED REYNOLDS

A handful of TV stations such as KUSA-TV, Gannett Broadcasting's NBC affiliate in Denver, have launched local newscasts in HD. Several Viacom TV stations in 2005 will also be broadcasting local sports in HD, such as the NBA's Lakers on CBS owned-and-operated KCAL in Los Angeles and baseball's Red Sox on CBS O&O WBZ in Boston. "HD is a game changer, offering broadcasters a huge competitive advantage," said Rohrs.

Another approach to monetizing digital is the over-the-air, low-cost alternative to cable offered by U.S. Digital Television, which launched last year in Salt Lake City; Albuquerque, N.M.; and Las Vegas. By the end of 2004, USDTV's service boasted 10,000 subscribers. Emmis Communications announced a similar offering last April.

Other broadcasters are pursuing multicasting options. By mid-February, 15 of NBC's 230 affiliates will be using part of their digital spectrum to broadcast NBC Weather Plus, a 24-hour local weather channel.

In 2004, dozens of TV stations added daily morning news and newscasts on weekends—a trend likely to continue. "The world doesn't only work during the week. We've learned through the cable experience that if we leave any void, cable will sell it," said Reynolds. "It's part of being No. 1 in the news seven days a week."

IN 2005 RADIO NEEDS TO TURN its fortunes around. Even though it will likely break the $20 billion mark in '04, it's small comfort to an industry that has been struggling to raise its profile with advertisers, listeners and Wall Street. November revenue was positive, putting the industry up 3 percent year-to-date. But following months of lackluster growth, it still wasn't enough to impress.

"Over the last two years, radio advertising growth has lagged retail sales," noted Mark Fratrick, vp for BIA Financial Network, who pointed to the growth of advertising in cable, outdoor and the Internet. Automotive has also been weak in radio, preferring the more familiar advertising territory of TV and the local newspaper.

And while satellite radio may not be siphoning off any real ad dollars yet, they're sucking dry the confidence of commercial radio by dominating the headlines and signing Howard Stern and other high-profile programming. By the end of 2004, Sirius and XM Satellite Radio collectively boasted more than 4 million subscribers.

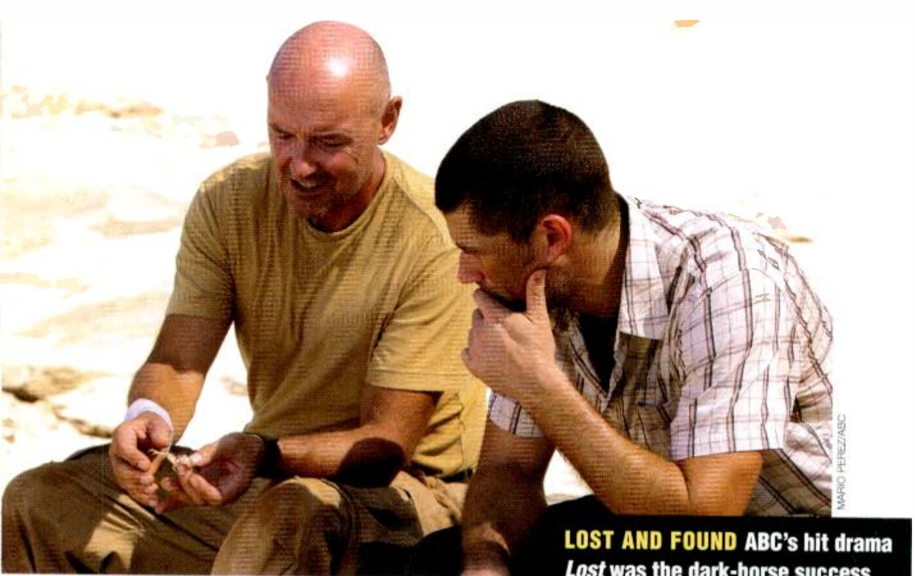
"Digital radio needs to come soon because of satellite radio. Otherwise radio will be seen as a stodgy old medium," said Natalie Swed Stone, director of national radio for OMD. In 2004, about 100 stations made the conversion, and by the end of the year nearly every major group said it would make the transition in 2005 or 2006.

It's not all bad news for radio. The industry finally reeled in Wal-Mart, an advertiser it has targeted for years. And niche formats, particularly Hispanic, posted solid growth, a business proposition not lost on the nation's three largest groups, Clear Channel, Infinity and ABC Radio, which made significant plans to pursue the Latino listener in 2005.

"Radio still has a chance to prove its problems are cyclical, and it has about a year to do it," said Jim Boyle, media analyst for Wachovia Securities.

This will be the year CC's "less-is-more" plan to reduce ad clutter unfolds. In mid-December, its 1,200 radio stations cut spot loads by an average of 20 percent. Radio groups are also depending on studies from the Radio Advertising Effectiveness Lab to help demonstrate the medium's value, often forgotten in the marketing mix. Finally, radio groups will continue to weigh electronic measurement, though not unanimously. Cox Radio and Radio One refused to participate in Arbitron's Houston portable people meter trial. ■

Senior editor Katy Bachman covers TV and radio stations, as well as research. She is based in Alexandria, Va.



LOST AND FOUND ABC's hit drama *Lost* was the dark-horse success for the 2004-2005 season.

tv production

BY A.J. FRUTKIN

THE PAST YEAR HAD ITS FAIR share of surprises. While most advertisers predicted success for ABC's *Desperate Housewives*, no one bet on this much success. And no one saw *Lost* coming.

After previewing the scripted *Survivor*-like show at last spring's upfront presentations, media buyers believed it looked more like a cheesy TV movie than a hit series. Then there's *The Apprentice 2* finale. Who would have thought viewership would decline by 39 percent versus season one's finale? Certainly not Donald Trump—or NBC Universal Television group president Jeff Zucker for that matter.

Of course, NBC's overall decline this season came as no shock to advertisers. With a subpar development slate, most of its freshman series already are gone. Last spring, NBC bounced back from a low-rated fall with *The Apprentice*. Whether it can do it again this year is uncertain. If it can't, the GE-owned network heads into the 2005 upfront marketplace more vulnerable than ever.

But NBC's loss was CBS' gain, leading to its November sweeps win among viewers 18-49. This achievement was made all the more stunning because CBS continues to sell itself as 25-54.

Which is not to say the Viacom-owned net sailed through the year unscathed. From Janet Jackson's wardrobe malfunction to Dan Rather's fact-checking malfunction (not to mention the network's programming malfunction in canceling *The Reagans*), if there's one department Viacom co-chair Leslie Moonves might want to exert more control over in the coming year, it's standards and practices. Fox also has suffered from content challenges. The News Corp.-owned net reached all-time lows, from its extreme surgery show, *The Swan*, to its upcoming adoption show, *Who's Your Daddy*.

Then there's the dubious issue of copyright infringement. In an industry nearly predicated on concept theft, who decided it's OK to steal ideas once they've hit the air, but not OK before they hit the air? NBC can rip off *American Idol*'s contest format for *Last Comic Standing* and *Next Action Star*. But Fox can't beat NBC's *The Contender* to the punch with *The Next Great Champ*? Besides, who really was hurt by the move? Fox's *Trading Spouses* has had little impact on ABC's strong *Wife Swap*. And what about *Champ*? If NBC can't improve on that dog, then it had no business announcing its pact with Mark Burnett and Sly Stallone as early as it did. But the copycat scandal just won't go away for Fox, which was slapped earlier this month with a lawsuit from *Wife Swap* producers RDF Media.

Still, strong ratings for *American Idol 4* this month could wipe away most of Fox's problems. And 30 million—even 20 million—viewers can do that for a network, as ABC found out this season. After Stephen McPherson replaced ex-programmers Lloyd Braun and Susan Lyne last spring, many advertisers doubted whether the Disney-owned network could reverse its fortunes as quickly as it has.

But with McPherson's deft hand in ABC's development last year as Touchstone TV president, a couple of smart scheduling moves following his promotion and a little bit of luck, he came out on top. Now comes his next test. With *Alias* relaunching behind *Lost*, can McPherson build an audience for the quirky spy drama beyond its cult following? And can he build on the network's breakout success next season?

Even if he can't, the impact of *Housewives* and *Lost* on network development already is discernible. Most major competitors have scrambled to find their own versions either of *Housewives*' so-called heightened drama or *Lost*'s high-concept drama.

What neither *Housewives* nor *Lost* can impact is network comedy, which continues to struggle through one of the genre's most extensive down cycles. No sitcom this season has emerged as even slightly competitive. *Arrested Development*'s Emmy win hasn't helped its ratings. Nor has the pedigree of *Friends*-spinoff *Joey*. NBC has been quietly touting its remake of Brit hit *The Office*, set to launch later this season. But mainstream success for the quirky copycat is hardly a slam dunk.

Meanwhile, the TV industry continues to consolidate. With NBC swallowing up Universal TV's once potent studio and CBS' Nancy Tellem overseeing sister studio Paramount, the likelihood of an out-of-the-box comedy hit emerging from this entrenched corporate system looks even slimmer in the new year.

If there remains a wild card that can change the fortunes of any network, then it may still lie in reality. Despite the genre's apparent slump this season, more than half a dozen new nonscripted shows begin launching this week, including ABC's parenting makeover show, *Super Nanny* (Jan. 17); CBS' domestic diva search, *Wickedly Perfect* (Jan. 6); and NBC's *Sports Illustrated Swimsuit Model Search* (Jan. 5). Who knows? Any one of them could change the game again. ■

Senior editor A.J. Frutkin covers TV production from *Mediaweek*'s Los Angeles bureau.

magazines

'05

BY LISA GRANATSTEIN

IF THE MAGAZINE INDUSTRY has learned anything in 2004, it's that adversity breeds innovation and innovation leads to imitation.

Winded but not beaten after a decimating economic downturn, publishers last year came back determined to compete for their share of the media pie, launching magazines, employing new circulation strategies, diversifying their advertising, and even tapping new leaders to lay the groundwork for the year ahead.

Unlike years past, 2004 saw only a handful of major magazines fold (Hearst Magazines' *Lifetime* and G+J USA Publishing's *YM*) and scads of new offerings (Hearst's *Shop Etc.*, Fairchild Publications' *Vitals*, Condé Nast's *Cargo*, and a conga line of launches from Time Inc., including *Suede*, *Life* and *Cottage Living*).

Inspired by the success of *In Touch*—Bauer Publishing's 1 million-circ celebrity weekly that sells on newsstands for $1.99—publishers launched a slew of cheap magazines. Among them: *All You*, Time Inc.'s Wal-Mart title; Hachette Filipacchi Media's *For Me*; and Bauer's *Life & Style*. This month, American Media Inc. will partner with Wal-Mart for *Good Living Now*.

Women's titles will continue to be the main event in '05. Fairchild will spin off a women's version of *Vitals* in February and is testing *Cookie*, a parenting magazine. Hearst is developing a low-cost service title. And *TV Guide* is toiling away on the tentatively titled *Inside TV*, which will be geared to young women. Meanwhile, Rodale will publish five issues of *Women's Health* after a successful test last year of the *Men's Health* spinoff. Condé Nast will introduce a home shopping title called *Domino*. Readers looking for an edgy pop culture fix can look forward to the April relaunch of Maer Roshan's *Radar*.

For the first time in a few years, many publishers actually experienced optimism, and the numbers backed it up. Through November, major advertising categories saw significant gains. Automotive spending grew 8.7 percent to $2.1 billion, according to the Publishers Information Bureau; toiletries & cosmetics increased 6.5 percent to $1.7 billion; and retail rose 17.8 percent to $1.1 billion.

Next year, many ad categories are expected to remain strong performers. Notably, publishers will be eyeing the booming luxury marketplace. A wealth of advertising is likely to flow thanks to what's now characterized as "masstige." No longer mixing like oil and water, mass and prestige brands are blending faster than you can say "Tommy Hilfiger couture."

"There is a new paradigm of fashion," explained Pattie Garrahy, CEO of PGR Media, whose client Tommy Hilfiger last year acquired luxe brand Karl Lagerfeld. "There is a change in the consumer psyche, where you can wear a Gap T-shirt with a Moschino skirt. It's not black and white anymore." Publishers such as Condé Nast's *Glamour* are happily carrying pages from both Hugo Boss and H&M, said vp, publisher Bill Wackermann.

Despite the encouraging signs, there are still concerns about technology and financial advertising, and now pharmaceuticals as well. Arthritis medication Vioxx has been removed from shelves after studies revealed heightened risks of heart attacks. There are similar concerns over Celebrex and over-the-counter Aleve. The loss of those pages will no doubt hurt some publishers. Through November, ads for the three drugs accounted for a total of $61.3 million in magazines, up 22.2 percent from the year prior, according to TNS Media Intelligence/CMR. While the drug ads tend to be found in older-skewing titles, which anticipate that most, if not all, ads will be pulled, younger magazines that count pharmaceuticals as a component of their advertising are also concerned. "We're hoping it's a microcosm and not reflective of the whole category," said Vicci Lasdon Rose, *Us Weekly* vp, publisher. "The challenge is not about the individual drugs but about the approval process, and any tightening of the process will affect drugs in every category."

There were also a few notable shake-ups at some publishing companies. Condé Nast veteran Chuck Townsend succeeded Steve Florio, and Reiman Publications' Russell Denson replaced the embattled Dan Brewster as CEO of G+J after an embarrassing legal battle with Rosie O'Donnell.

A PROVEN FORMULA The success of Bauer's low-cost newsstand prices has led to several imitators.

While Townsend made major changes, installing new publishers at *Glamour*, *Bon Appétit*, *House & Garden* and *Self*, the moves were seamless. Less so at G+J, which saw the exit of Brewster's inner circle, along with more than 100 staffers. Many industry observers speculate Denson is cleaning house for a sale this year, but the CEO denies it.

Finally, the media world is anticipating the return of Martha Stewart, who ends her prison term in March. ABC veteran Susan Lyne has taken the helm of Martha Stewart Living Omnimedia. Expect Stewart's flagging print flagship, *Martha Stewart Living*, to receive a boost, and by late 2005 or early '06 look for *Living* to regain its competitive edge against the likes of Time Inc.'s *Real Simple* and Hearst and Oprah Winfrey's *O, The Oprah Magazine*. ■

General editor Lisa Granatstein covers the magazine industry for *Mediaweek*.

forecast2005
washington

BY TODD SHIELDS

PAST LOOKS TO BE PROLOGUE for telecommunications issues in Washington in 2005, with broadcast indecency, media ownership and the transition to digital TV likely to remain important issues in Congress and among federal regulators.

Each issue lingered through 2004 without resolution. This year legislative and court calendars could set the stage for decisive action. Lawmakers say they will quickly introduce legislation in the new 109th Congress to increase penalties for broadcast indecency—a goal narrowly missed in the 108th Congress as both the House and Senate passed language but could not agree on a final version. And the U.S. Supreme Court is about to decide whether to review the Federal Communications Commission's 2003 decision to relax broadcast ownership restrictions.

If the high court declines to hear the case or lets stand a June 2004 lower-court decision critical of the FCC, the agency could be forced to commence a laborious rewrite of its new rules. Results could include a retreat from the looser rules envisaged by FCC Chairman Michael Powell, a Republican.

Odds for action may be greatest when the new Congress takes up the long-running transition from old-fashioned analog TV service to digital TV, a change that Congress decided should happen by 2007, or when 85 percent of homes can receive digital TV. Once the switch is complete, TV stations are supposed to relinquish the wavelengths they've used for decades.

Legislators face pressure from emergency-service workers who covet spectrum used by TV stations with channel assignments in the 60s. But they also face what may prove to be greater pressure in a Washington where yawning budget deficits promise to force difficult decisions.

For several years, initial federal budgets have counted as revenue the billions of dollars that are presumed ready to be harvested by auctioning the frequencies that TV stations vacate. Such budget projections amounted to a statement that the spectrum sale would, in fact, take place. But each time the revenue line disappeared amid pressure from broadcasters and with the stark acknowledgement that the date for the digital transition seemed only to recede as most consumers ignored the chance to switch to digital TV.

That calculus could soon change. "I do think in the next Congress we can do a hard date" for the transition to digital TV, Rep. Joe Barton (R-Texas), chair of the powerful House Commerce Committee that oversees broadcast law, said at an industry conference in Washington this fall. "The primary reason we're going to do it is real simple. It's dollars." Barton said each committee chair was under pressure from GOP House leaders to find ways to close budget gaps.

The departing Congress left an indication that Barton's sentiments are widespread when it passed a nonbinding statement that the transition to digital TV should be completed as early as 2007.

Powell's FCC has offered a guidepost toward reaching that seemingly far-fetched goal, with its suggestion that regulators could count as digitally converted each household that takes cable TV service. The idea is that, for those clinging to old-fashioned sets, broadcasters' digital signals could be converted by either the cable provider or through a cable box atop each TV. Still, even using the FCC's clever scheme, there would be 73 million analog TV sets on kitchen counters, in garages and elsewhere not hooked up to cable, according to the National Association of Broadcasters. Those sets would become little more than paperweights the morning after the transition.

Barton and others have spoken of offering subsidies for set-top converter boxes. But the idea of millions of expensive paperweights—and a constituency not happy about having them—could prove daunting. "Are members of Congress really going to disenfranchise millions and millions of citizens from their local TV service?" said Dennis Wharton, spokesman for the broadcasters' group.

"I do think in the next Congress we can do a hard-date [digital transition]. The primary reason we're going to do it is real simple. It's dollars."

REP. JOE BARTON

MICHAEL KLEINFELD/UPI

The digital battle will play out as cable and broadcast interests alike hope to avoid turbulence from another source. Prompted mainly by turmoil in the fast-changing telephone market, Senate Commerce committee leaders have said they may change provisions of the 1996 Telecommunications Act that brought deregulation to telephone and broadcast services. Once the act is reopened, many interests could pile on. For instance, a majority of senators has voted several times to tighten media ownership rules and could form a block demanding such language in any broad telecommunications legislation.

Others may press for reregulation of cable subscription rates that annually outstrip inflation. Cable companies hope the Senate Commerce committee will leave them alone. "We believe it's important to maintain the regulatory stability that's existed," said Robert Sachs, president and CEO of the National Cable & Telecommunications Association, at a year-end briefing. ■

Washington editor Todd Shields covers media industry regulation from *Mediaweek*'s Washington, D.C. bureau.

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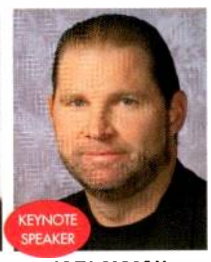

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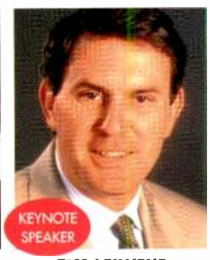

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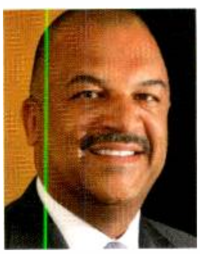
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research

BY KATY BACHMAN

LAST OCTOBER, AT THE annual meeting of the Association of National Advertisers, Jim Stengel, global marketing officer for Procter & Gamble, stepped inside one of those glass-enclosed money booths seen on convention floors in order to make a point about the current state of media and marketing research. As hundreds of dollar bills blew around him, Stengel tried to grab as many as he could in 10 seconds, a task P&G believes is not unlike predicting a marketer's return on investment from its advertising dollars. "Without the right measurement, we really don't know how well our efforts work," Stengel said. "We don't really know if we're in touch with our consumers. We cannot continue to apply traditional thinking to the new world of technology and marketing channels available to us today."

P&G's daunting challenge will be the major driver influencing the direction of media research in 2005. Not only are advertisers taking a more active role in holding media more accountable, they are doing so at a time when technology is rapidly changing the way consumers use the media. Whether it's digital video recorders that allow consumers to view TV when they want it or skip commercials, or newer media alternatives that engage the consumer to challenge traditional media, such as the Internet, iPods or satellite radio, figuring out the consumer's media behavior will be no small feat this year.

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MONEY MAN Stengel showed the ANA crowd how hard it is to calculate advertising ROI.

"We have to figure out a day in the life of the consumer," said Brad Adgate, senior vp, director of corporate research for Horizon Media. "We're seeing all sorts of advertising in many more media—mall and cinema advertising, satellite radio, product placement in videogames and TV, the Internet. They're all consumer touch points, and if you take zero-based planning, you won't be dumping all your dollars into network TV or a four-page magazine [ad]."

In 2004, Nielsen Media Research and Arbitron, separately and together, began to lay the groundwork to deliver in 2005 the kind of new measures required in an increasingly consumer-centric media world where the user not only controls the media, but also creates content.

The most direct answer to P&G's challenge is a joint effort unveiled at the ANA by Arbitron and *Mediaweek* parent company VNU to create a single-source research service that marries Arbitron's portable people meter (which measures consumer usage of all media, radio, TV and cable using a single device) to ACNielsen's in-home consumer panel, providing measures of both media consumption and product purchase. P&G plans to be the first client of the service, which is being actively marketed by both companies. Should more advertisers agree with P&G, the service could be up and running by the closing months of the year.

Even as the two companies collaborate on the P&G initiative, VNU subsidiary Nielsen Media Research has been slower to embrace the PPM as a TV ratings currency. While Arbitron concentrates on its demonstration of the PPM as a TV and radio ratings service in Houston in 2005, Nielsen is focused on a number of other research efforts. The main one is the continued rollout of its local people meters to four more top 10 TV markets, bringing the total number of LPM markets in 2005 to nine. Along with providing overnight demographic ratings in local markets, the LPM initiative also gives Nielsen the means to more than double its national TV panel. Although the rollout has been embroiled in controversy over its ability to accurately measure ethnic audiences, LPMs have already had a huge impact on how local TV is bought and sold, giving advertisers more data, more often.

Nielsen Media Research will also begin to introduce the industry's first measures of time-shifted TV viewing using new meters and new diaries. The ratings firm estimated that DVRs are currently in 4 percent to 5 percent of TV homes and could hit 10 percent this year. "That could have the biggest impact on ratings since people meters," said Adgate. "At first it won't make a difference because DVR penetration is low, but as it grows, it will have a huge impact."

Yet while there are many efforts underway to provide measures for all the individual media (including some that have never been measured before, such as out-of-home), there's scant research about how the media interact to impact the consumer.

"Anything that attempts to measure media in a more meaningful way is good. But the challenge is to understand that people don't use media in isolation. We need to move away from looking at media individually and see how they link together," said Richard Fielding, vp/director of insights and analytics at Starcom. He added that may mean looking for new answers outside the two big research firms. "We have to be careful that [Arbitron and Nielsen] don't dictate the agenda. They don't own the data in set-top boxes; they don't own different ways to measure the consumer. It's going to be a new model." ■

EAST

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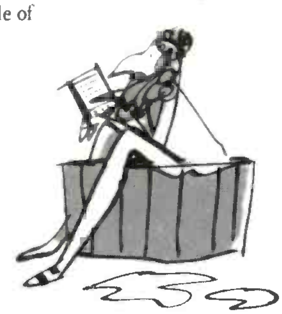

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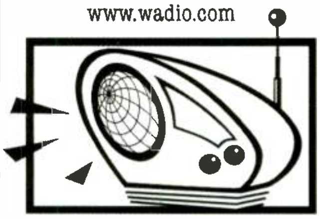

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BY EILEEN DAVIS HUDSON

Kansas City

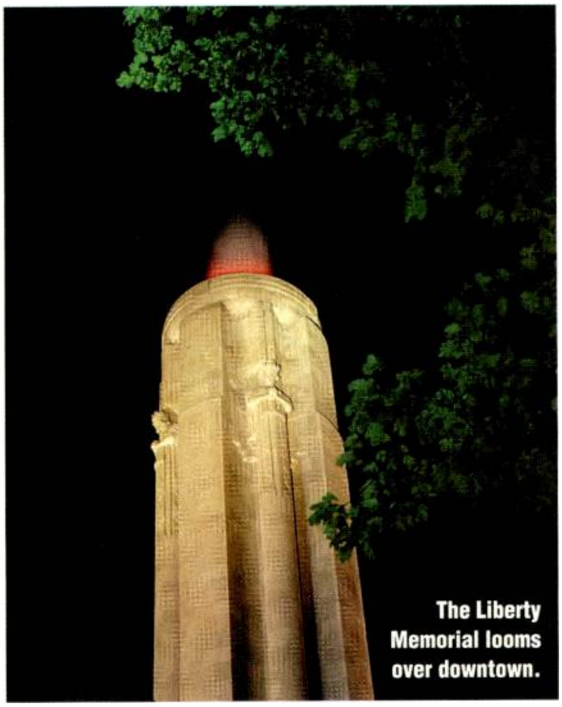
ALREADY THE HOME OF SEVERAL PROFESSIONAL SPORTS FRANCHISES, INCLUDING the National Football League's Chiefs, Major League Baseball's Royals and Major League Soccer's Wizards, Kansas City hopes to lure yet another pro sports team to a brand-new downtown arena. Construction of the $250 million Sprint Center is slated to begin next month and be completed by 2007. As yet, the center does not have a deal with any franchise to move to this Midwest sports mecca.

Last year politics rivaled sports in its impact on local media. The Kansas City television market, which ranks No. 31 in the nation with 894,580 TV households, received a huge overall boost from political ad spending. "Revenue for the whole market is going to be up 20 percent," says Craig Allison, station manager for Scripps Howard Broadcasting's K.C. duopoly of NBC affiliate KSHB-TV and Independent KMCI.

The market may get another duopoly in the coming months if the Federal Communications Commission approves Meredith Corp.'s plan to purchase the local WB affiliate, KSMO-TV, now owned by Sinclair Broadcast Group (Meredith already owns CBS affiliate KCTV). In another broadcast television station partnership here, Hearst-Argyle Television, which owns ABC affiliate KMBC, operates privately owned UPN affiliate KCWE under a local marketing agreement.

Kirk Black, vp and general manager of KCTV and KSMO, says Meredith purchased "everything but the license" of KSMO in November and will seek a waiver to purchase the license by claiming that KSMO is a "failing station." Meredith will have to prove that KSMO's status meets the FCC definition of "failing." KCTV is already selling advertising for KSMO and providing some input into programming decisions, says Black.

KCTV had been an also-ran in the market before undergoing a complete overhaul several years ago. "We were in bad shape," Black says of KCTV when he took over in 2001. "We've changed literally everything about our news and branding." That included all the main anchors. The newest anchor hire is Michael Scott, who co-anchors at 5, 6 and 10 p.m. Scott, who started last October, arrived from WBTV in Charlotte, N.C. The overhaul also included extensive programming changes, the addition of a 4 p.m. newscast, expansion of weekday- and Saturday-morning news, and the addition of a Saturday-evening newscast.


KEVIN SINK/MIDWESTOCK

The Liberty Memorial looms over downtown.

The results are in the numbers. KCTV won in households at 10 p.m. in November for the first time in 13 years, reports Black. It was also "the only station to show year-to-year and book-to-book ratings growth in every one of its newscasts" in November, he adds.

About a year ago, KCTV began outsourcing its sports programming to Metrosports, Kansas City's 24-hour all-sports network. Metrosports, a division of Time Warner Cable, now produces the sports segments for KCTV's local news and the preseason Chiefs games that air on the station.

As an NBC affiliate, KSHB enjoyed revenue and ratings gains from the network's Summer Olympics coverage, says KSHB and KMCI's Allison. KSHB's complete relaunch of its local news about two years ago, under the Action News brand and emphasizing breaking news, has also started to pay off, he adds.

"This station was a Fox affiliate with not much news, so we've had to build our news," says Allison. KSHB and Fox owned-and-operated WDAF swapped affiliations almost a decade ago.

Channel 38's KMCI, branded "38 the Spot," aims younger (18-34) with syndicated fare including *The Simpsons, That '70s Show* and *Malcolm in the Middle*. For two years, KMCI has had an exclusive agreement to air 14 select over-the-air broadcasts of Royals Sunday games. In 2003, the team launched its own Royals Sports Television Network, which is available on cable and satellite.

At KMBC, president/gm Wayne Godsey, who's also gm of KCWE, says his biggest challenge is battling the strong CBS prime-time lineup, particularly the 9 o'clock hour. He says it has significantly hurt KMBC, despite the success of ABC's early-prime programming. But while KMBC's late news is hurt by its lackluster lead-ins, its early-evening news enjoys an advantage of about 45 percent over the competition, thanks to the blockbuster lead-ins of *The Dr. Phil Show* at 3 p.m. and *The Oprah Winfrey Show* at 4 p.m.

KCWE, which double-runs that day's broadcast of *Dr. Phil* and *Oprah* from 9-11

NIELSEN MONITOR-PLUS

AD SPENDING BY MEDIA / KANSAS CITY

	Jan.-Dec. 2002	Jan.-Dec. 2003
Local Newspaper	$163,699,710	$184,140,950
Spot TV	$163,427,240	$172,860,950
Outdoor	$7,212,436	$7,509,580
Local Sunday Supplement	$3,433,990	$3,445,600
Local Magazine	$1,271,820	$1,587,420
Total	$339,045,196	$369,544,500

Source: Nielsen Monitor-Plus

SCARBOROUGH PROFILE

Comparison of Kansas City

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Kansas City Composition %	Kansas City Index
DEMOGRAPHICS			
Age 18-34	31	31	100
Age 35-54	40	40	100
Age 55+	29	29	100
HHI $75,000+	31	26	84
College Graduate	14	15	111
Any Postgraduate Work	11	11	100
Professional/Managerial	26	28	107
African American	13	10	79
Hispanic	14	6	44
MEDIA USAGE-AVERAGE AUDIENCES*			
Read Any Daily Newspaper	53	47	89
Read Any Sunday Newspaper	61	57	93
Total Radio Morning Drive M-F	21	21	96
Total Radio Afternoon Drive M-F	18	17	94
Total TV Early News M-F	29	29	100
Total TV Prime Time M-Sun	38	39	103
Total Cable Prime Time M-Sun	15	15	100
MEDIA USAGE-OTHER			
Accessed Internet Past 30 Days	61	62	102
HOME TECHNOLOGY			
Owns a Personal Computer	68	70	103
Purchase Using Internet Past 12 Months	43	45	105
HH Connected to Cable	66	64	97
HH Connected to Satellite/Microwave Dish	20	20	100
HH Uses Broadband Internet Connection	23	25	111

*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.
Source: 2003 Scarborough Research Top 50 Market Report (February 2003 - March 2004)

NEWSPAPERS: THE ABCs

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Jackson County (Mo.): 366 589 Households				
The Kansas City Star	86,668	122,285	32.5%	45.9%
Johnson County (Kan.): 180,407 Households				
The Kansas City Star	84,517	112,032	46.8%	62.1%
The Olathe News	5,892		3.3%	
Clay County (Mo.): 74,428 Households				
The Kansas City Star	26,679	39,190	35.8%	52.7%
Wyandotte County (Kan.): 58,809 Households				
The Kansas City Star	15,603	20,627	26.5%	35.1%

Data is based on audited numbers published in the Audit Bureau of Circulations' Spring 2004 County Penetration Report.

p.m., has improved its share of audience, says Godsey. Among programming changes at KCWE last fall, the station passed *Entertainment Tonight* to KMBC at 6:30 p.m., and picked up *Fear Factor* at 5 p.m.

WDAF distinguishes itself in the market by producing eight hours of local news a day, more than any other station in Kansas City, says Bryan McGruder, vp of news. In November, WDAF won in households in the morning-news race from 5-9 a.m. WDAF's sign-on-to-sign-off ratings in November made it the second-best-performing Fox outlet in the country, he says. The station is now looking for a replacement for Carmen Ainsworth, its primary female anchor at 6 and 10 p.m., who left the market last September.

In local radio, Entercom leads the pack, controlling about 40 percent of the ad revenue. The company owns two of the market's top three stations in both ratings and revenue: News/Talk/Sports KMBZ-AM, No. 2 overall among listeners 12-plus, with a 6.4 share in the summer Arbitron survey; and Album Oriented Rock KQRC-FM, which earned a 6.3 share. Meanwhile, KQRC generated $10.9 million in estimated ad revenue, compared to KMBZ's $10.4 million, according to BIA Financial Network's 2003 estimates, the latest data available.

Locally owned Carter Broadcast Group, with two stations in Kansas City, is a strong competitor against Entercom and other radio giants in the market like Infinity Broadcasting, Cumulus Broadcasting and Susquehanna Radio. Carter's Urban KPRS-FM is the No. 1 station overall, garnering a 7.1 share in the summer. It is also No. 1 in afternoon drive.

Entercom has made several changes to its Kansas City radio cluster in the past 18 months, including installing new management. In January 2004, the company tapped Cindy Schloss as the new vp/market manager of its Kansas City group. She was previously market manager of Clear Channel's cluster in Albuquerque, N.M. In 2003, Entercom opted not to renew its longtime relationship with the Royals Radio Network; KMBZ had been the flagship station of the team.

Despite the end of its Royals partnership, Entercom in fall 2003 launched an All Sports station at 610 AM, KCSP-AM. Subsequently, the company relocated Country WDAF from 610 AM to 106.5 on the FM band and folded its Smooth Jazz KCIY-FM. The Royals are now heard on Union Broadcasting's WHB-AM. Union purchased Rock KZPL-FM in 2003 and also owns Talk KCTE-AM, which does not show up in the Arbitrons.

Carter sold a third Sports station in the market, KCKN-AM, to All Comedy Radio in April 2004 for $1.6 million, giving ACR its second O&O in the country. Also in April, Susquehanna acquired '80s and '90s Hits station KCJK-FM outright by buying out Jesscom Inc.'s 60 percent interest for approximately $14.8 million in cash. Last October, Butler Broadcasting Group sold Business News KCZZ-AM to Davidson Media Group for $3.9 million, and Davidson flipped the station to Spanish/Variety.

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Kansas City Star is the market's lone metropolitan daily. Its daily circulation grew 1.1 percent to 270,335 in September 2004, compared to the period ended September 2003, according to the Audit Bureau of Circulations. The *Star*'s Sunday circ was essentially flat at 377,938.

In December, *Star* publisher Art Brisbane was named the new senior vp of Knight Ridder, succeeded by Mac Tully, most recently a Knight Ridder vp in San Jose, Calif. The *Star* is building a $200 million press facility across the street from its downtown office that will open in the first quarter of 2006. The paper, which also owns four area community newspapers, plans to launch a major redesign with the new press, including converting to a narrower 50-inch width, says Mark Zieman, *Star* editor and vp.

Lamar Advertising and Viacom Outdoor Advertising control the vast majority of the available outdoor inventory in the DMA. Viacom has more posters, while Lamar offers more bulletins. ■

ARBITRON
RADIO OWNERSHIP

Owner	Stations	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Entercom Communications	4 AM, 5 FM	33.5	$41.6	39.8%
Infinity Broadcasting	4 FM	16.5	$27.3	26.1%
Susquehanna Radio	1 AM, 3 FM	12.9	$18.4	17.5%
Carter Broadcast Group	1 AM, 1 FM	8.2	$8.4	8.1%
Union Broadcasting	1 AM, 1 FM	5.5	$3.8	3.6%
Cumulus Broadcasting	2 FM	7.6	$2.2	2.1%

Includes only stations with significant registration in Arbitron diary returns and licensed in Kansas City or immediate area. Share data from Arbitron Summer 2004 book; revenue and owner information provided by BIA Financial Network.

NIELSEN RATINGS / KANSAS CITY
EVENING- AND LATE-NEWS DAYPARTS, WEEKDAYS

Evening News

Time	Network	Station	Rating	Share
4-4:30 p.m.	CBS	KCTV	4.1	10
5-5:30 p.m.	ABC	KMBC	6.6	16
	Fox	WDAF	6.0	12
	CBS	KCTV	5.8	12
	NBC	KSHB	5.2	11
	Independent	KMCI*	1.1	2
	WB	KSMO*	1.0	2
	UPN	KCWE*	0.7	2
	Pax	KPXE*	0.3	1
5:30-6 p.m.	Fox	WDAF	6.0	12
6-6:30 p.m.	ABC	KMBC	8.6	17
	CBS	KCTV	6.8	13
	NBC	KSHB	5.2	10
	Fox	WDAF	5.0	10
	WB	KSMO*	2.0	4
	Independent	KMCI*	1.7	3
	UPN	KCWE*	1.2	2
	Pax	KPXE*	0.4	1

Late News

Time	Network	Station	Rating	Share
9-10 p.m.	Fox	WDAF	6.9	11
10-10:30 p.m.	ABC	KMBC	10.7	17
	CBS	KCTV	8.8	14
	Fox	WDAF	6.5	11
	NBC	KSHB	5.7	9
	WB	KSMO*	2.0	3
	Independent	KMCI*	1.9	3
	UPN	KCWE*	1.7	3
	Pax	KPXE*	0.8	1

*Non-news programming. Source: Nielsen Media Research, July 2004.

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BY MARC BERMAN

Midseason Mediocrity

AS WE START THE NEW YEAR, IT'S TIME FOR THE BROADCAST NETWORKS TO UNVEIL A new batch of shows—only this time, it's under calmer circumstances, unlike the fall. For anyone who doubts the relevance of midseason, remember that some of TV's biggest hits—*All in the Family, Hill Street Blues, The Simpsons, Malcolm in the Middle* and *The Apprentice*—debuted in what is also referred to as the second season. Midseason is an important time for the nets. Not only does it offer them a chance to put failing shows out of their misery, but it also gives them the opportunity to introduce new shows to viewers gradually, over a period of a few months.

In the frantic two-week period during which most fall TV shows debut, viewers have less chance to sample new offerings, and this takes its toll. Of the 33 new fall TV shows that premiered, 12 are now gone, 12 more are on the fence, six await cancellation and only three (ABC's *Desperate Housewives* and *Lost*, and CBS' *CSI:NY*) can be considered hits. The rollout of 30-odd shows over the next three months will give networks the chance to promote their shows in a more sane atmosphere.

But this year, the networks seem to be squandering any opportunity to gain viewers. More of the same is on the schedule beginning in January.

If you think there is a lot of reality programming on TV now, then be prepared for overload. In addition to the return of *American Idol* and *The Simple Life*, which Fox thinks still has an audience, we will see at least another dozen new nonscripted hours. Everyone from money-hungry relatives and boxing hopefuls to nasty chefs and Martha Stewart wannabes will vie for their 15 minutes of fame. New projects include NBC's *The Contender*, with former action hero Sylvester Stallone, and ABC's *Super Nanny* (both of which Fox has already ripped off via *The Next Great Champ* and *Nanny 911*), Fox's *Hell's Kitchen*, the WB's fame-seeking *The Starlet*, and CBS' Martha Stewart-esque *Wickedly Perfect*.

Although all this new reality comes as no surprise (you know that old Mr. TV saying: Success breeds imitation), I have to assume that, had the networks known the genre was heading for a downward spiral, we would be seeing less of it.

Considering how much of its audience NBC has lost this season, it seems Patricia Arquette is already working with the dead.

First up is CBS' *Wickedly Perfect*, in which former morning-show host Joan Lunden presides over 12 perfection-obsessed contestants in search of his or her own lifestyle-oriented television show. Fortunately for *Wickedly Perfect*, the reality hour will be over before Martha gets out of the slammer, because once she does, all eyes will be on the tainted domestic diva. I expect this show to lose heat as quickly as an overworked glue gun.

Then there is *The Will*, also on CBS, which features family and friends of a deceased wealthy patriarch competing for a large portion of his estate. It sounds just like failed ABC reality dud *The Family*. Maybe that's why the network is burying it (pun intended) on Saturday.

Which leads us to comedies—rather, the lack thereof. Right now there are only eight new comedies planned for midseason: NBC's *Committed* and *The Office*; an untitled John Stamos project from ABC; Fox's *American Dad* and *Kelsey Grammar's Sketch Show*; the WB's *Shacking Up*; and *Cuts* and *Bad Girls Guide* on UPN. While there is some buzz on *The Office*, this is just a retread of the BBC hit. So much for originality.

In an effort to capitalize on the current crime-solving drama obsession, look for projects like CBS' *Numb3rs*; ABC's *Blind Justice* and *Eyes*; and Fox's *Jonny Zero*, which has the unfortunate task of airing on the network's dead-in-the-water Friday. Up in the air is what NBC will do with *Law & Order* spinoff *Trial by Jury*, since star Jerry Orbach passed away last week.

Fox is hoping that serial *Point Pleasant* will do what the recently concluded *North Shore* couldn't, and that's find an audience. However, much more interesting to me is NBC's *Medium*, which features Patricia Arquette as a woman who is able to see and hear dead people, providing justice for those who no longer have a voice. Considering how much of its audience NBC has lost this season, it seems to me she is already working with the dead.

The key observation about this midseason is that none of the new shows look out of the ordinary. Still, there is some good news. We won't start seeing the rash of expected *Desperate Housewives* and *Lost* imitators until next fall. It takes time, after all, to copy another network's success. ■

Do you agree, or disagree, with Mr. TV? Please e-mail mberman@mediaweek.com and let him know if you would like your response published in an upcoming issue.

GLEN HANSON

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