

Television/Radio Age

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TV EROSION CONTINUES

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August 21, 1989 • \$3.50

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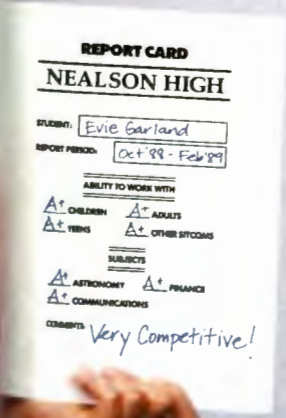
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Television/Radio Age

August 21, 1989

Volume XXXVII, No. 2

Agency execs ask: 'Is the issue clutter, or is it network bread-and-butter?'

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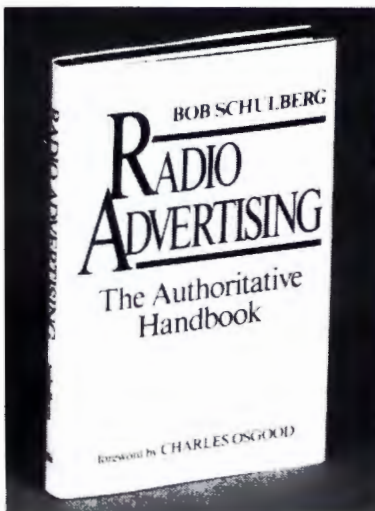
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\$24.95 (Hardcover Only)

In the radio industry, little is remembered and even less is chronicled about history and tradition. In such an environment, Bob Schulberg fills an important gap with *Radio Advertising: The Authoritative Handbook*. The book provides a vital overview of the radio industry from earliest traditions to grid cards.

With a broad brush, Schulberg, Western Marketing Director for CBS Radio Representatives, touches on radio selling techniques from barter and co-op to vendor money and pricing. He presents radio's strengths and weaknesses and even vividly describes a typical encounter between salesperson and agency time buyer negotiating cost-per-point instead of reach-and-frequency.

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Publisher's Letter

The ad world is moving firmly toward electronic measurement

The advertising world is moving firmly in the direction of electronic measurement. The recent Arbitron announcement that it will begin operation of an electronic TV commercial monitoring system called MediaWatch next spring is only the latest development. Nielsen already has something like it called Monitor-Plus in 23 markets and is using electronic monitoring of commercials as part of its NTI service.

Both Nielsen and Arbitron have begun using handsets to record the bar codes of products purchased by sample households. The Nielsen household meter is an old story, of course, but the people meter, which supplements it, is now firmly ensconced in the audience measurement scene. Nielsen is now funding work by the David Sarnoff Research Center on a "passive" people meter which recognizes faces via a camera-like device.

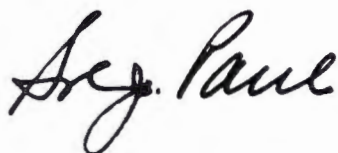
Print, too. TV is not the only ad medium looking to high tech to measure audiences. At a recent Advertising Research Foundation workshop on media research—its first—a device was described which would record driver interest in billboards. This would be done via special light intensifiers and filters hidden in the billboards. It was claimed that these devices would actually be able to read the number of eyes focused on the billboards.

Also described by Lee Weinblatt, CEO of The Pretesting Co., were chip transmitters that could be bound into magazines, one type being as small as a pin and another as thin as a sheet of paper. They would be powered by a wrist watch worn by the respondent and would identify the magazine being read.

More than gadgets. These devices are more than gadgets that toy-loving admen like to play with. Their rationale is to increase the accuracy of data-gathering, and, in some cases, remove the burden of active responding from members of a sample. Some may seem intrusive, but if they are generally perceived that way, the public will just refuse to participate. Some of the devices are the result of the faster speed and cheaper computing power of electronic data processing.

It is the power of the computer that permits Arbitron and Nielsen to offer MediaWatch and Monitor-Plus as a practical service. To put it simply, a commercial's TV signal voltages are converted into numbers, which are then matched against sets of numbers in memory for identification. New commercials require human intervention, but the bulk of commercials are identified automatically, thus cutting costs. The systems are not perfect, and time will tell whether they are economically viable.

New 'Focus.' Readers will notice a new section in the front of the magazine called *Focus*. It replaces *Final Edition* and, we feel, better reflects the nature and style of TV/RADIO AGE. As a biweekly, TV/RADIO AGE focuses on significant trends in the broadcast business, goes behind the news and puts the news in context. *Final Edition* has, by and large, been doing this all along, but we felt that the "look" of our material should more accurately mirror its nature. *Focus*, we feel, does this.



WE'RE GOING THROUGH THE TOP

80% of U.S. Households Will Be Looking At Divorce This Year.

Once again, Divorce Court is among the leading syndicated television shows. 10 of the top 10 markets. 22 of the top 25. More than 100 stations bringing Divorce Court to over 80% of U.S. TV Households.

It's really no surprise. Dramatic new stories and strong scripts spotlighting issues from today's headlines—all combine to make Divorce Court one of syndication's all time hits. With lots of surprises to come in the sixth season.

So if you've got your Divorce, you're all set. But if you still want one, call Mike Weiser at (212) 603-5954 or Howard Levy at (212) 603-5950. Let them help you put your ratings through the top, too.



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Arbitron, Council at odds over radio sample sizes

Arbitron Radio has a burr on its saddle anent the issue of sample size. The research service and the Arbitron Radio Advisory Council (ARAC) are at odds about the need for a third more sample across all measured markets. ARAC says stations want the additional sample without additional fees and without reducing the number of reports.

Dennis Israel, president/CEO of Empire Radio Partners and ARAC chairman, points out that before '88 Arbitron had been sampling at the higher level, but it reduced sample sizes on the grounds that sampling was unnecessarily high—and without reducing prices.

At this point Arbitron's position is that, while it understands the concerns of stations seeking larger samples for small demo cells, it is not convinced that a 33% increase is the best way to go about it. But it will study alternatives.

Nielsen: another CPR use

Nielsen will play a wait-and-see game in the wake of Arbitron's announcement that it has committed itself to a scheduled rollout of its MediaWatch service for electronic monitoring of commercials. Arbitron will be employing computerized pattern recognition (CPR) for identifying commercials, in place of the manual methods now being used by its BAR, starting in the spring of '90.

Nielsen has been using CPR in its Monitor-Plus service, primarily for marketing data, in 23 markets and as part of its NTI service, but it is not apparently prepared to compete with a computerized BAR.

WWOR-TV revamping its weekday schedule

WWOR-TV New York will be radically revamping its weekday schedule starting next month with more first run programs than ever. A major focus is the 5-8 p.m. block with four new shows—*McHale's Navy*, *Silver Spoons*, *Who's the Boss?* and *The New Leave it to Beaver*—leading into the *Cosby* show and *Kate & Allie*.

The new primetime schedule will consist of hours and half hours of the same series back to back, a technique the station began on weekends a few years ago. As for daytime, the station is taking a big step with a three-hour news/information/talk show starting at 10.

WTTG, Washington indie, shows audience prowess

Fox's WTTG(TV) Washington has been showing its audience prowess in diverse ways recently. It ranked first in its market, sign-on to sign-off, with an 18 share in the July Arbitron, beating two of the affiliates—WJLA-TV and WUSA(TV)—by two share points and the other affiliate—WRC-TV—by one.

This is the second time in recent years that WTTG has been first in its market in sign-on to sign-off household shares. The Fox outlet was one point below the leader (WUSA) in the May Arbitron, though it ranked fourth in the May Nielsen, one point below WRC-TV and WJLA-TV (see feature, page 36).

WTTG also came out first in the May Niensens among all indies with primetime news with a 16 share (see *News about News*, July 24). And it tied with KPLR-TV St. Louis in overall DMA shares for leadership among indies in Nielsen July metered reports; both stations had 16 shares.

Researchers mull angles of Hispanic measurement

Asked about possible differences in methodology that may be required as Nielsen starts selecting sample households in the Los Angeles DMA for its 200-household pilot study of Hispanic audience measurement, Doug Darfield, vice president, research director for Univision, says, "That's exactly what we want to find out."

Telemundo Group and Univision Holdings have signed a multi-million contract with Nielsen for development of a national Hispanic TV rating service using people meters.

Darfield explains: "We'll be monitoring their test closely to determine just what, if any, modifications may be needed in Nielsen's standard operating procedures in general market measurement." And he points to several factors that could make Hispanic measurement different.

One, he notes, is family size: "It's not easy to make sure kids in any household, Spanish- or English-speaking, push the right button when they're supposed to. But with more children in the average Hispanic family, tracking kids' viewing becomes even more critical."

Incentives. Other areas to be watched carefully, adds Darfield, are Nielsen's ability to identify Hispanic households "and the levels of incentive and any additional instructions required for viewers in the Hispanic sample. And these last two could turn out to differ between our more assimilated Hispanics and those who have been in the U.S. for less than two or three years."

As for some of the other potential problems, Nielsen is expected to do the same thing in Hispanic households without telephones as in non-phone English-speaking households: Since meter data normally flow back to a central

Nielsen collecting point via regular telephone lines, the researcher must install a specially dedicated data transmission line in non-telephone sample households. It's details like this that contribute to the high cost and therefore high prices that broadcasters are socked with for acceptably valid audience measurement, whatever the language spoken in a sample household.

As for instructions, all Nielsen's field representatives working with Hispanics will be bilingual. Nielsen relies heavily on parents, even in its general market sample, to supervise their young children's button-pushing activity closely, and that will be true in Hispanic households, too.

All people meters used in Hispanic households will be bilingual. And for large families, including those in the general market sample, people meters are already available with 16 buttons. These can accommodate families with up to 15 members and still leave a button free for a visitor.

Household recruiting for the pilot study is expected to start in mid-September. Then, once the Los Angeles pilot is concluded, Nielsen will conduct a nationwide survey, polling about 30,000 homes in respect to country of origin, demographics and language used. The results of this survey will be used to select Nielsen's national sample of 800 Hispanic households.

Indies gain in New York

Independent stations are making all the revenue gains in New York, according to the monthly *Arthur Young Report*, which shows collective station revenues in the market. Total station sales for the first six months of the year are flat for affiliates, the report states, while the market's three major indies are up 25% over the equivalent period a year earlier.

TvB seeks to encourage marketing research

Harvey Spiegel, retiring senior vice president, research, at TvB, will be riding herd on a major bureau project when he begins his consultancy in October. The project is designed to encourage stations in medium and smaller markets to band together and support the type of research done in larger markets on media consumption and shopping habits.

The bureau has already received answers from most of the research companies who were asked to submit proposals for the media/marketing research. Those who received RFPs include most of the big names in this area of research: Arbitron, Nielsen, Birch Scarborough, Simmons, MRI, Impact Resources (MA-RT), Frank Magid & Associates, McHugh-Hoffman, Leigh Stowell, Marshall Marketing, Norman Hecht Research and GMA.

Explaining why more media/marketing research hasn't been done in the medium and smaller markets, Spiegel says: "Research companies have tried to get stations to

work together, but they've been seldom successful. It takes the experience of a TvB to get stations to cooperate." The retiring TvB executive points out that some of the media/marketing research done in the top markets is supported by one station but that such research is too expensive in smaller markets. The RFP from TvB calls for the type of research that would usually be done once a year, Spiegel notes.

The TvB board's research committee, headed by Lawrence Pollock, president of the eastern division of Capital Cities/ABC owned stations, will make a decision on who will be assigned the research before the bureau's annual meeting in Los Angeles on November 13-15. But the announcement will be made at the meeting, to be held at the Century Plaza.

Spiegel has been at the TvB for over 33 years. His company will be called Harvey Spiegel & Associates Inc.

Most top 10 network TV clients upped May \$\$

Most of the top 10 network TV clients in May increased their ad investments over the previous May, according to BAR data, as analyzed by TV/RADIO AGE. The only exceptions were two of the major package goods companies—Procter & Gamble and Unilever.

Sizeable jumps in spending were racked up by General Motors and Sears Roebuck. The automotive client climbed from \$27.8 million last year to \$54.3 million this May, while Sears rocketed up from \$9.6 million in '88 to \$24.7 million this year. Philip Morris was also a lively network TV investor, rising from \$32.3 million last year to \$43.2 million in May '89.

Eight of the top 10 spenders in May were also among the top 10 for the year to date. Not on that list were Sears and Eastman Kodak. Ranked ninth in network TV spending in the January-May period is Chrysler, with \$76.3 million, down from \$102.2 million in '88. Ranked 10th is Kohlberg Kravis Roberts, which, with RJR Nabisco added to its stable, spent \$76.3 million this year, down from \$95.9 million last year, including RJR Nabisco.

Top 10 web TV clients—May

| Parent company | May expenditures | Year-to-date expenditures |
|--------------------|------------------|---------------------------|
| General motors | \$54,339,300 | \$211,019,100 |
| Philip Morris Cos. | 43,183,000 | 157,884,400 |
| Kellogg | 32,036,600 | 131,755,800 |
| Ford | 28,651,900 | 98,237,900 |
| McDonalds | 28,469,500 | 104,662,800 |
| Procter & Gamble | 25,480,500 | 146,041,200 |
| Sears Roebuck | 24,693,200 | 74,177,200 |
| Eastman Kodak | 19,368,600 | 59,355,300 |
| Unilever | 17,283,100 | 83,168,400 |
| Johnson & Johnson | 16,736,000 | 79,615,600 |

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Computerized News Management from Columbine goes to market

William Cole is finally bringing his computerized News Management system to market. The founder and CEO of Columbine Systems will be showing his multifaceted News Management software at the Radio-Television News Directors Assn.'s convention in Kansas City next month and at the National Assn. of Broadcasters' Radio '89 convention in New Orleans, also next month.

Columbine, which has been marketing broadcast station systems for 25 years, has been working on perfecting News Management since the early '80s but was given a boost by new IBM hardware. This is the Application System/400, in-

Prices for the entire system start at about \$75,000.

roduced last year in the largest worldwide product announcement in IBM's history. The AS/400 has been described as *the* minicomputer system sold by IBM through the turn of the century. Columbine marketing executive Stuart Hellman, an ex-IBM man, explains that the AS/400 is important because it offered Columbine the opportunity to make its computerized newsroom offering competitive.

Columbine people say that News Management was designed from the top down for managing a news department in addition to offering news retrieval, word processing, storage and the other capabilities that go into a computerized newsroom.

Unified system. Cole, who thinks big, points out that News Management is part of a unified system, though it is offered separately. This unified system consists of four software components. In addition

to news, they are administration, business and sales. On top of this Columbine offers what it calls a "service partnership." Also a four-partner, this "client optimization" offering covers account management, consulting, technical support and training. Together, they make up the sinews of Columbine's strategic marketing program through the next decade. This is called Concept/2000.

The integration philosophy that is at the heart of Concept/2000 and dear to Cole's heart is also carried out in the News Management software. This consists of seven components:

■ **News scripting**—Scripts can be written on location as well as in the newsroom and are available immediately to producers and lineup editors.

■ **Story outlook**—The system permits users to track past, current and future news along with information regarding date, times, reporter covering the event and sources of expertise, and provides for "attaching" relevant wire stories, scripts and story notes.

■ **Producer's desk**—This is described as the culmination of News Management. It lets the producer experiment with various versions of the news program lineup and adjusts the time factors automatically.

■ **Archives**—The large storage capacity of the AS/400 allows it to perform as a "library of unlimited historical information" that can be retrieved by topic, keyword, date, location, author or producer.

■ **Automation interface**—The system automatically initiates the playing of tapes with news footage, supers and freeze frames. It controls teleprompters, switchers, cart machines, character generators and closed captioning devices. Software is now being written.

■ **Personnel and equipment**—This allows information regarding personnel and equipment to be accessed by management.

The AS/400 line consists of seven models with upgrading provided for and a wide range of capabilities: a 24-fold growth range in main memory, a 48-fold growth range in storage and a 10-fold performance range in the number of completed transactions per hour.

Prices for the entire system, including peripherals (Columbine is an IBM "business partner" and sells the hardware, too), start at



Steve Hinkle, news director of KDBC-TV El Paso, is shown with IBM's AS/400 computer, used by Columbine for its News Management system.

about \$75,000 and go into the multimillions for a network with multi systems.

News Management is by no means untried. It has been installed at one network and four station operations, all test sites. The network is CTV, Canada's single, private, national network, which helped pay for developing the software on IBM's System 38 starting early in the '80s. TV stations with the News Management system include CHCH-TV Hamilton, Ontario; KDBC-TV, a CBS affiliate in El Paso, and WJTV(TV) Jackson, Miss., also a CBS affiliate. The lone radio installation is at Cox's KFI/KOST(FM) Los Angeles. Recently, Columbine sold a system to the Televisa station group in Mexico. The sale was said to be in the "hundreds of thousands."

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GERALDO

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OPRAH

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DONAHUE

-8%

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Geraldo
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Company

Station Sales



Source: NT 89 vs. 88

Ex-cop's TV shop books \$62 million in crime-time, other TV, cable fare

Sonny Grosso has gone from tracking down perpetrators as a veteran New York City detective to pursuing series commitments from network execs.

As might be expected from a program production company whose partners include a cop involved in solving the "French Connection" drug case, many of Grosso-Jacobson Entertainment Corp.'s projects have a law and order setting—but not all.

The 11-year-old New York-based shop, despite having only about 20 fulltime staffers, has \$62 million in program production for 1989-90, even without further pickups that could occur among projects still under consideration, according to Grosso and Larry Jacobson. That sum encompasses four network series, including two due in NBC primetime; two cable network series, both on USA Network; one syndicated series; plus several TV movies and pilots, for CBS, NBC and HBO.

Crime-time series. CBS' *Night Heat* and USA's *Diamonds and Strike Force* have crimefighter themes, and *Cop Talk: Behind the Badge*, a syndicated talk show that Grosso himself hosts, focuses on real-life police topics. *Truck One* on NBC will be about an unusual New York City police emergency services unit—one that is usually "in a lifesaving situation rather than a cops-and-robbers setting," as Jacobson observes.

On the other hand, two major series that have nothing to do with cops are NBC's *Family Man*, a domestic sitcom starring Robert Mitchum, and CBS' *Pee-wee's Playhouse*, the top-rated live-action Saturday morning children's series.

Truck One is a 13-hour commitment for NBC, whose own NBC Productions is the partner with Grosso-Jacobson. A rescue action series similar to NBC's *Emergency* of a few years ago, this project is

geared for "early evening" and will have 12 regulars, "almost like *Hill Street Blues*," says Jacobson.

BBDO's pilot report says the show's high-tech truck is "loaded with the latest in sophisticated rescue gear and SWAT team firepower" to handle everything from subway disasters to terrorist attacks. Jacobson notes that the series is being shot at New York's Pier 62, where MTM's *Tattinger's* was based and where CBS' *Kojak* also will be shooting this season.

Unusual sitcom order. Paul Schulman, president, Paul Schulman Co., feels *Truck One* could bolster NBC's Friday night if it were the leadoff show instead of *Baywatch*, which he says will hamper *Hardball* at 9 p.m. (ET). NBC is targeting *Truck One* for a November start, Jacobson notes.

For *Family Man*, another coventure with NBC Productions, NBC has ordered a two-hour pilot, "unusual" for a half-hour sitcom, says Jacobson, who adds that the number of episodes is "not yet known"

since it's designed for midseason use. *Family Man*, initially titled *One Man's Family*, is "an extended-family sitcom" in which four youngsters devise a plan to stay out of an orphanage: They adopt a crusty homeless man and tell the authorities he is their grandfather, says BBDO's pilot report. Friction develops when he takes his role seriously.

The average cost for a two-hour dramatic movie or pilot now is more than \$3 million, Jacobson estimates.

Of that, "the networks are paying us about \$2.5 million." The costs can be higher if a pilot is loaded with on-location shoots, special effects, stunts and star power. The *Night Heat* series, on the other hand, costs \$650,000-plus per hour episode, he adds.

Foreign aid. Foreign TV sales enable producers like Grosso-Jacobson to recoup some of their production deficits, as do eventual syndication and cable deals. *Night Heat*, for instance, is distributed to 62 nations via King World and Disney, he says. In a reverse of the usual process, series being made for cable such as *Diamonds* and *Strike Force*, eventually may recoup by going into commercial TV syndication. "I certainly hope so," says Jacobson. "Nobody knows yet. No



"Truck One," due in November, features a state-of-the-art vehicle with more accoutrements than are actually on the New York police unit's vehicles. The "embellished" version grew out of suggestions made by NBC's Brandon Tartikoff.

one has yet had a cable series run for five years."

Grosso-Jacobson produced *Night Heat*, *Diamonds* and *Strike Force* primarily in Canada. *Diamonds*, which like *Night Heat* began as a CBS late nighter, is shoot-



Sonny Grosso not only produces programs but hosts the syndicated "Cop Talk."

ing new episodes in Toronto and Paris in association with Alliance Entertainment; Global TV carries the series in Canada, TF1 in France. Similarly, *Strike Force*, with 22 episodes due on USA as of January, will air on Canada's CTV Network and France's TF1. Besides shooting in Canada, this series (again in association with Alliance) will do episodes in France and elsewhere in Europe, perhaps even behind the Iron Curtain, Jacobson says.

Such linkups with Canada and France are its first coventures with foreign producers, but they won't be the last, he notes. "That's going to become more and more important" for the industry as a whole as 1992 approaches, he adds. Such partnerships also represent a way to "cut risks and huge deficits—and they give an interesting look to the series." Shooting series in Canada is "substantially" cheaper than in the U.S., Jacobson says, adding that the savings can translate to \$100,000 per one-hour episode.

Primetime Pee-wee? Perhaps the company's most offbeat production is *Pee-wee's Playhouse*. In its first season on the series, which has had several previous producer partners, Grosso-Jacobson will produce 20 episodes, well above the

13-episode norm for kidvid. That will include two shot in Hawaii, which Jacobson hints may be broadcast in CBS primetime.

Besides its various series, the company has four pilots in development for CBS plus a TV movie apiece for CBS, NBC and HBO, the latter's entitled *Benny and the Breeze*, about gangs in Little Italy in the 1950s. The pilots include some "blind deals," in which the choice of projects is up to the producers. Talks are also underway with ABC and Fox Network.

Turning to the Big 3 networks' pilot system, Jacobson calls it "such an expensive way to go." Moreover, he adds, "Series never really are like the pilots since it takes months to develop a pilot, then you pump episodes out one a week as a series." He would welcome a less frantic system, as NBC and CBS programming bosses have lately hinted, but he wonders if that will materialize.

In addition to his behind-the-

"Series never really are like the pilots since it takes months to develop a pilot, then you pump episodes out one a week..."

scenes career, Grosso hosts *Cop Talk*, a Teletrib-syndicated talk show whose clearances give it 80% coverage of U.S. TV households. That makes Grosso the only producer who also hosts his own national TV series, a company spokeswoman notes.

Grosso and Jacobson's 11-year partnership began when the two men met through a law firm that represented both American International Pictures, where Jacobson worked at the time, and Phil D'Antoni, who produced *The French Connection* and NBC's *Movin' On*, and with whom Grosso was then associated. Jacobson brought Grosso into AIP to work on a TV movie. Eventually AIP's TV operation was spun off, associated briefly with Time-Life Television and Columbia Pictures Industries before

going independent.

Since then, the duo has added Alan Wagner, the onetime CBS and Disney Channel exec, as a principal. Wagner oversees Grosso-Jacobson's development staff.

Soviet television after 'glasnost' in next issue

The effect of "glasnost" on Soviet television and its implications for U.S. newscasters and the TV industry in general will be the subject of a major feature in the Sept. 4 issue of TV/RADIO AGE. The article will be written by Joyce Barnathan, who was Moscow bureau chief for *Newsweek* from May 1985 to September 1988.

Barnathan is now beginning on a Gannett Center for Media Studies fellowship under which she will write a book on "glasnost." She has covered four summit meetings and won the Overseas Press Club award for best magazine reporting from abroad for her 1989 summit coverage. She also won the National Headliner award for spot news coverage of the Chernobyl nuclear disaster in 1987.

Barnathan is the daughter of Julius Barnathan, senior vice president, technology and strategic planning, Capital Cities/ABC.



Near the Kremlin in Moscow, Joyce Barnathan takes a stroll with her husband, Steven Strasser, who was also a "Newsweek" correspondent, and their son Jason.

TV Business Barometer

Local increase in June: 3.9%

Local TV time sales did a little better than spot in percentage growth in June, but it was really nothing worth talking about. Still, local billings showed a better growth rate than spot did during both the second quarter and the first half.

The local increase in June came to 3.9%, compared to 2.9% for national/regional spot. June's rise was a little below par for this year as far as local was concerned, but it was bigger than some months, smaller than others. Unfortunately for TV stations, no month so far this year repeated the 13.3% increase in local billings that occurred in January.

Local time sales reached \$452.9 million during June, quite a drop from the \$611.9 million for May. But the drop was mainly seasonal, of course, since both months were four weeks under the Standard

Broadcast Calendar. The June volume level for local business was a little lower than that of spot, which was \$484.7 million.

June was the sixth straight month that the smaller stations—those in the under-\$7 million annual revenue bracket—showed the highest percentage of increase in local business. In January this group was tied for first place in percentage increase with the larger (over \$15 million) stations.

For the second quarter, local billings came to \$1,648.1 million, up from \$1,562.2 million. That's equivalent to an increase of 5.5%. Spot billings for the second quarter amounted to \$1,729.7 million, up 3.0% from the '88 figure of \$1,678.7 million, still a little ahead of local billings.

For the six months, local business is 6.0% ahead of last year. Billings amounted to \$2,971.0 million vs. \$2,803.5 million in '88. Spot is still a little ahead with billings of \$3,014.9 million.

Local billings passed spot in the first quarter due to the high seasonal level of local billings in March. (Local billings have been running ahead of spot in March for a few years.) Since local passed spot in billings (for the first time) last year, it is likely to do the same this year.

Network comp

As for network compensation, the June increase was greater percentage-wise than that of either spot or local time sales. The network comp increase came to 5.5%, and the station take was \$38.4 million vs. \$36.4 million in '88.

For the second quarter, network comp was up 3.4% to \$120.9 million. Last year's April-June figure for network comp was \$116.9 million. For the first half of this year, network comp was up 4.4% to \$237.3 million.

The June total of spot and local time sales plus network comp was up 3.5% to \$976.0 million. The grand total for the six months came to \$6,223.2 million, up 4.1%.

June

Local business **+3.9%**

(millions)

1988: \$435.9 1989: \$452.9

Changes by annual station revenue

| | | |
|-------------------|-------|--------|
| Under \$7 million | | +10.5% |
| \$7-15 million | | +8.8% |
| \$15 million up | | +1.7% |

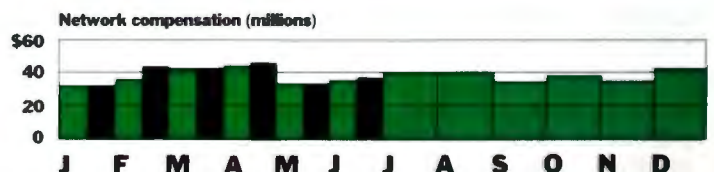
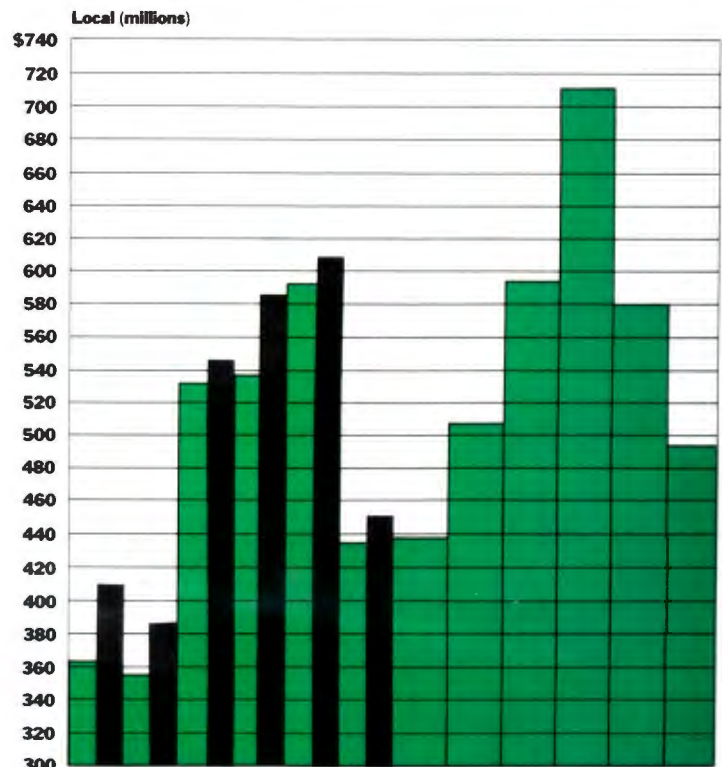
Network compensation **+5.5%**

(millions)

1988: \$36.4 1989: \$38.4

Changes by annual station revenue

| | | |
|-------------------|-------|-------|
| Under \$7 million | | +0.2% |
| \$7-15 million | | -0.2% |
| \$15 million up | | +7.8% |



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F INFLUENCE

Danish television growth crippled by funding, advertising limits

Dragged screaming and kicking into the age of commercial television after a 20 year debate, many Danish officials remain adamant in their determination to see that it doesn't expand too rapidly.

As in most European countries, where deregulation doesn't exactly mean no regulations, Denmark is currently embroiled in a continuing controversy over how many commercials are too many. While American tourists generally are enamored by European sensitivity to commercial placement and limitation, they obviously are not concerned about how broadcasters survive. The heart of the debate lies with government's insistence that state-owned TV2, which went on the air last October, must live within its government imposed means.

Handcuffs. "The politicians," recognizes TV2 programming head Jorgen Stein Nielsen, would never let us increase our commercial time beyond the 10 minutes we are allowed each day." He argues that if the commercial time were doubled, TV2 would not only be able to survive profitably but also could expand.

To be fair, government leaders are aware of TV2's potential but differ in their views toward its immediate future. While some members of the ruling coalition are in favor of expansion, members of a smaller, but swing party are not. As a consequence TV2 officials are laboring to revise ambitious programming plans so they can stay within next year's \$91 million budget.

The network currently is on the air about six hours a day, almost two-and-a-half times the minimum time stipulated in its license. Although Nielsen points out that within five months of its launch, TV2 frequently had higher ratings than its well established rival. DR, also state owned, Communications Minister Torben Rechendorf wants costs cut.

How TV2 does that is a matter of conjecture at the moment. It is committed to establishing eight regional stations, but it costs more money to run each than the advertising revenue it generates. Each station can only air five minutes of commercials each day. Rechendorf has indicated the government might be prepared to allow TV2 to save money by delaying the launch of some of the regional stations.

Less time, fewer ads. Even taking that possibility into account, however, TV2 officials acknowledge they cannot meet the government's target without reducing airtime. In general most executives are against the idea. Nielsen argues that a reduction of airtime would adversely affect the station's ability to attract advertisers. He attributes TV2's success so far to an equal mixture of imports including, U.S. hits, *Family Ties* and *St. Elsewhere*, and locally produced programs.

He complains that in spite of its popularity, the government is putting the network in the position of "breaking down when it should be building up," adding a cutback in expense would preclude the production of more domestic programs, which everyone favors. Nielsen also laments that the government onslaught has demoralized TV2's 200 employees.

DR has a staff of 3,000 members and operates on twice the TV2 budget, programming approximately nine hours each day. While observers agree Nielsen and his colleagues have reason to be justifiably proud of TV2's accomplishments and even excused for their expansionist fervor, they explain that dependency on state funding takes away a great deal of the freedom a commercial broadcast enjoys.

Although, they say, TV2 may compete for viewers with DR, it is not encumbered with the same public service and production obligations which require considerably more financing. Supporters of the

system point out that running a state owned television network is not just a question of achieving the highest ratings.

This brief could explain why DR programming head Henrik Antonson is unperturbed about TV2's ratings success. "Everything is pretty much the same," he says, adding that in general, DR hasn't changed its schedule. He does acknowledge, however, that TV2's entry into the marketplace has increased the competition for imported shows.

Funding. Although the government funds 30% of TV2's budget from viewer license fees, which at \$22 a year, is among the lowest in Europe, commercial revenue accounts for the other 70%. TV2 executives, thus, are faced with a classic chicken and egg situation.

U.S. web movies complete shooting in British locales

Two major U.S. network TV movies likely to be aired before the end of the year have completed European shooting. One, CBS', *The Return of Sam McCloud*, is a member of the class of popular 1970s weekly one hours which now has been updated for a late '80s revival. It joins *Kojak*, *Columbo* and *Perry Mason* in that category.

In the case of *McCloud*, regulars Dennis Weaver, Terry Carter, Diana Muldaur and J.D. Cannon, are back from the original series, hardly looking much older than they did 12 years ago when the series ended. The story line, however, has not only shifted to London but has become measurably stronger, vigorously tackling environmental and financial issues.

Weaver, who has been extremely active in charitable groups, says that the opportunity to explore more basic issues in depth is one of the reasons he has been enthusiastic about participating in another *McCloud*. Carter, a former news anchorman, shares his view, adding that he shifted from anchorman to actor because he believed that television drama offered a greater opportunity to bring issues paramount to world survival to viewer

attention.

As to whether *McCloud* will ride again beyond the current film, none of the returning regulars would rule out the possibility of a rating success on the movie, prompting talk of a revival of a weekly series. On the other hand, to a greater or lesser extent, most of the performers dismissed the idea as premature, Weaver acknowledging, however, that the notion was not beyond the realm of possibility. It seemed clear he would not veto the idea out of hand if it actually were to materialize.

Although his colleagues seemed genuinely delighted about the current project, they appeared less enthusiastic about continuing to participate in any future *McCloud* weekly series. While the thought of *McCloud* returning might be seen as a spur of the moment ratings brainstorm, the fact is that network officials have been considering it for a number of years.

Fast action. Another project which dates back some time, in this case to the early "eights," according to executive producer, Merrill H. Karpf, is *A Connecticut Yankee in King Arthur's Court*, loosely based on Mark Twain's classic. "Yet," says Karpf, "when NBC finally gave the project a go. We only had three weeks to get it all together and begin shooting."

Although, quite obviously, the audience and critics ultimately will judge whether the final program is successful. By any objective standard, Karpf and his associates used the three weeks wisely, managing to gather around them a cast of international stature.

The movie stars Keshia Knight Pulliam (*The Cosby Show*), Michael Gross (*Family Ties*), Emma Samms (*Dynasty*), Whip Hubley (*North and South, Book II*), Rene Auberjonois (*Benson*) and Jean Marsh (*Upstairs, Downstairs*).

The Return of *McCloud* is a Michael Sloan Production in association with Universal Television. *Connecticut Yankee* is from Schaefer/Karpf Productions in association with Consolidated Entertainment, which has worldwide distribution rights outside the U.S. Neither program has a definite scheduled air date.

Some satellite channels tout ratings, but Euro cable access no panacea

While many of the satellite channels are crowing over the results of the third PETAR (Pan European Television Audience Research) ratings, the fact remains that there is a reasonably large percentage of viewers who have cable access to the channels who don't tune to them.

Some of the channel operators prefer to pretend a lack of concern, citing slight increases in viewing year after year as proof of growing success. There are a few people, however, who admit they are actively trying to discover why.

"This," says Super Channel head of market analysis Julian Pound, "is where we have the competitive edge." This fall Super Channel will release the results of a three-year study analyzing viewer expectations and use of TV. Pound anticipates that the study will influence future Super Channel program choices and scheduling.

Flemish aid. PETAR discloses that the European cable universe has increased by close to five million homes between April 1988 and April 1989. Two million, however, result from inclusion of Belgium's Flemish region in the study for the first time. During the year a European court overturned Flanders' official's refusal to allow foreign language channels on Flemish cable systems.

While there has been a sharp increase in the number of homes being cabled in a few countries, such as Germany and The Netherlands, cable installation has remained virtually stagnant in the U.K., Switzerland and Norway.

Overall cable/satellite viewing has risen about six minutes a day on average since the last survey, while viewing of terrestrial stations has increased only about one-and-a-half minutes each day. Sky Television is producing its own study which will more clearly reflect the results of Sky's essential switch from a pan-European channel to one concentrating on the U.K.

The PETAR study as conducted through the use of diaries during a four week period in April. Forty-

two hundred viewers were included in the sample. In addition there has been a separate study sponsored by the European Business Channel of one million businessmen in six key countries. The results of that undertaking were to be published shortly.

The percentage of people who watch cable/satellite channels from month to month varies from country to country from a low of 52% in The Netherlands to a high of 95% in West Germany, with the average across Europe placed at 75%. That means, of course, that a quarter of the available audience doesn't watch.

Blames the content. Specific reasons why people don't watch undoubtedly vary considerably in individual countries, but Marcel Desutter, president of Belgium's national organization of cable operators, blames the satellite owners. "Most of the content of the satellite programs are so poor," he says, "that people tend to watch the national channels." While he takes some liberty in describing what actually is broadcast, he declares, "Sky and Super show old fashioned films," adding, "and MTV only shows video clips which are dated after 10 minutes."

While presumably there are a number of viewers who are not fond of pop videos, according to PETAR, viewing of MTV Europe has increased substantially during the year. Nevertheless poor programming, coupled with people who gained access to cable regardless of whether they wanted it, seem to be the main factors in reducing satellite channel viewing. "In Finland you must remember," points out Eurocable planning manager Ilinea Mannikko, "we have community cable systems. The decision to cable an area is made on a majority basis," adding that some people may have cable who don't want it.

Pound concurs, acknowledging that in countries such as Finland and a few others where houses are cabled, occasionally against the wishes of the homeowner, there may be limited viewing.

Radio Report

Network a mixed bag for big spenders in May: BAR

Though May was a good month for network radio in general—up 12.6% in revenues, according to the Radio Network Assn.—it was a mixed bag for the leading clients, as revealed by BAR data and a TV/RADIO AGE analysis. Six of the top 10 were up, but one of the four which was down was the No. 1 spender, Sears. The retailer dropped in May expenditures from \$6.5 million last year to \$5.3 million in '89. But it's still up 11% for the five months.

The big increasers in the May top 10 included Motel 6, up from \$1,149,490 to \$1,769,970; J. C Penney, up from \$412,940 to \$1,596,625, and Procter & Gamble, up from \$721,125 to \$1,402,570. P&G is up about 25% for the January–May span.

Biggest percentage increase among the top 10 spenders for the year to date was earned by Motel 6, up 211% to \$8.4 million.

Top 10 web radio clients—May

| Parent company | May expenditures | Year-to-date expenditures |
|--------------------|------------------|---------------------------|
| Sears Roebuck | \$5,314,060 | \$25,524,785 |
| General Motors | 3,402,330 | 15,822,235 |
| Motel 6 | 1,769,970 | 8,413,950 |
| Cotter & Co. | 1,718,180 | 6,114,870 |
| Warner-Lambert | 1,663,010 | 5,840,280 |
| J.C. Penney | 1,596,625 | 3,121,000 |
| Ford | 1,491,275 | 4,667,075 |
| Procter & Gamble | 1,402,570 | 9,579,160 |
| Philip Morris Cos. | 1,215,800 | 2,785,015 |
| K Mart | 1,117,425 | 3,529,900 |

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More winners than losers among webs in RADAR 39

There were more winners than losers among the networks in RADAR 39. The spring '89 report by Statistical Research Inc. on program and commercial audiences showed 13 webs up and only five down from RADAR 38. This summary by the ABC Radio Networks covers persons 12-plus in the 6 a.m.–7 p.m. daypart, Monday-through-Saturday, a period common to all major networks. ABC says it is "the most appropriate way" to look at total week rankings, and a selection of press releases from ABC's competitors appear to agree.

Transtar emerged as No. 1 in 12-plus audiences for the first time, with 2,273,000 average persons, up 13.4% from RADAR 38. One of the dozen adult networks, Transtar also noted that it was No. 1 among 18-plus, 25–54s and 18–49s.

The biggest gainers percentagewise were both United Stations webs, which also sells Transtar. US 1, though a youth-oriented chain, emphasized its gains among 12-plus (up 28%), adults 18-plus (up 26%), 18–49s (up 27%) and 25–54s (up 19%). But the ABC press packet pointed out that US 1 was up 45% in 12–34s from the previous RADAR and up 19.3% from the spring '88 RADAR. US 2 was up 23% in 12-plus persons, up 23% also in adults 18-plus, up 29% in 18–49s and up 26% in adults 25–54.

Program rankings. In the program rankings, ABC's Paul Harvey led all the rest for the umpteenth time, copping all top five places. ABC's Information Network placed six times in the top 20 with its news reports, and the CBS Radio Network took the other nine places, three of them with *The Osgood File*, and the remainder, its news on the hour.

Westwood One talked up both the NBC Radio Network and The Source, the NBC youth network, with the latter up 13.7% in 18–34s. ABC-collected data showed The Source up 17.2% in 12–34s. The NBC adult web was up 14.5% in its target audience of 25–54s, ranking it sixth among 19 measured networks. The network was also up 11% in 12-plus audience and ranked fourth in that listing.

ABC's Information Network moved from third place in persons 12-plus in RADAR 38 to second place in RADAR 39, while its Entertainment chain went from first to third. ABC points out that the latest RADAR shows that its six networks, along with Satellite Music 1, which it sells, account for 45% of all 12-plus network audiences in the Monday–Saturday, 6 a.m.–7 p.m. period, excluding the Sheridan Broadcasting and National Black Networks.

Sheridan was up 15.1% in 12-plus audience in the latest RADAR, but NBN was down 19.4%.

Multi-rep pitches target regional sports sponsors

Operation Pro Fax, the sales effort underway by the radio reps to sell sportscasts to business-to-business advertisers, is named for its first target advertiser category, manufacturers and distributors of fax equipment. But if all goes according to plan, it won't be the reps' last target category.

The series of joint rep presentations got its start under the leadership of Sue Rayson, sports marketing director for Texas State Networks, and Tom Sheatham, sales manager of the Kansas City Chiefs Radio Network, at the NFL rights owners' meeting in Kansas City in March.

At this meeting, Rayson recalls, "We were talking new business ideas and noticed that there are companies with local budgets, others with national budgets, but very few companies have regional budgets to take advantage of the strong regional followings enjoyed by each of our 28 NFL football teams."

To try to remedy this, Rayson says, categories were identified whose national budgets could be broken

down regionally and whose interest in sports can be determined by watching the commercials on televised sports. One of the broad categories that qualifies is business-to-business: "Almost any kind of office equipment and services. And fax is one of the most rapidly spreading types of office equipment."

Making the case. Also present was John Luginbill, director, CBS Sports Marketing for CBS Radio Representatives. He notes that it was suggested that a fax at the elbow of every play-by-play sportscaster during the games would come in mighty handy to relay such instant items as sudden player injuries during simultaneous NFL games in other cities. Such reports could serve as natural segues into a sales message for the company whose fax equipment "made this report possible from Mile High Stadium in Denver." He adds that companies making and/or marketing fax equipment include AT&T, Murata, Panasonic, Sharp, Toshiba and Xerox.

The pitching team for the reps, in addition to Rayson, Sheatham and Luginbill, includes Jim Marshall of Eastman Radio, Abbie Argow of McGavren Guild Radio, Stu Heifetz of the Katz Radio Group and Lisa Lindeman of Durpetti & Associates.

Rayson calls fax "our test case. After that we could branch out to add some non-business-to-business categories to our prospect list. But we wouldn't target anyone a team might be likely to line up as a local sponsor. For instance, we might look at a national retail chain like Sears, athletic shoes or other sports equipment, or possibly men's toiletries. It's not easy to get 28 different people representing 28 different teams to agree on anything. But we did get them to agree to let their radio reps work on a joint presentation, then see how well we do going after some national budgets that it could make good marketing sense for them to divide regionally."

Madison Square Garden grows its radio network

Six stations already are signed to carry broadcasts of New York Knickerbockers basketball and Rangers hockey games throughout New York state via the Madison Garden Square Garden Radio Network. But by Oct. 6, when the Rangers open against the Winnipeg Jets, MSG Radio director David Halberstam figures he should have 10 or more stations carrying the play-by-play through upstate New York plus selected areas of Connecticut and Pennsylvania. He explains that New Jersey is not a prospective affiliate target zone because MSG Radio flagship WFAN New York already covers northern Jersey, "and going South would only bring us into Philadelphia '76ers territory." But the eventual number of affiliates, he adds, could wind up close to 20.

Affiliates get the game on a barter basis with MSG retaining 15 of the 25 commercial availabilities during the average two-and-a-half-hour game for regional sale. Each affiliate sells the other 10 commercial units locally. Halberstam says this past season's advertisers

who sponsored WFAN's Knicks and Rangers games with upstate distribution will get first crack at avails on MSG's expanded statewide network. These include the New York State Lottery, Nynex Yellow Pages and Frito Lay.

Halberstam says that before he came on board in 1987 the operation lost money "because then we carried only the home games. We'd go to an ad prospect, and he'd say, "What do I need half a schedule for? Come back when you can give me the road games, too. Now we carry all the games, home and away, 80 a season for the Rangers and 82 for the Knicks. Our sales have quadrupled, and we're now in the black."

Radio webs broaden use of interactive phone systems

Stuart D. Goldberg, just promoted to vice president, Westwood One/Audiotex, which offers informational telecommunications services to consumers nationwide, says he's working on possible applications that use Audiotex interactive 900 phone numbers to promote Westwood One radio stations but that they're still on the drawing board.

Right now it's the other way around: Westwood One stations promote listener use of Audiotex to call up for the latest sports scores and sports news from *Scores Plus*.

But E. J. "Jay" Williams Jr., president, Sheridan Broadcasting Networks, reports some of his ambitious plans for listener interactivity already operational and other applications much farther along than Goldberg's. Sheridan's new phone service, launched last month in cooperation with CommNetics, Inc. of Natick, Mass., already permits listeners to vote on issues of concern to U.S. blacks by using a touch-tone telephone. Last week listeners voted on whether they thought Jesse Jackson should run for mayor of Washington, D.C.

Says Williams: "This is the first time there's been nationwide polling of black opinion on the issues that affect blacks most. Right now those opinions serve as guidance to our news team on key issues. It's a new kind of nationwide focus group. During our startup stage, we solicit only yes or no answers. But we'll be fine-tuning it to include shades of opinion—the reasons behind the yeas and nays. Several other broadcast and print news organizations have combined to poll general market opinion for some time, but this is the first nationwide opinion poll of blacks only."

Opinionated opinion. Williams concedes, "It's not random. It's not scientific. Making people pay close to a dollar to express an opinion weeds out all but the most opinionated. But those are the people that count. They're the ones who care enough to make the time to register and vote and needle everyone else they can find to register and vote. For us it's instant ascertainment now. And as we fine-tune this, it will make Sheridan the primary source for a reading of how the Black community feels *this week* about the key national and international issues that affect us most."

Radio Business Barometer

Spot billings up 15.5% during June

The latest numbers from Radio Expenditure Reports testify to the continuing economic health of spot radio (see also *Radio Report*, August 7). The second quarter has been particularly and consistently strong.

RER's most recent report reveals June billings up 15.5%, following a 16.5% increase in May and a 23.9% increase in April. Both the April and May increases are adjusted to account for differences in the Standard Broadcast Month (SBM) this year and last. However, April-plus-May of '88 and '89 are both nine weeks and, hence, comparable.

The spot radio business total for June was \$97,328,300, up from \$84,283,300 during June '88. This was slightly off from the May figure of \$100,291,500. (Both May and June '89 were four-week SBMs.)

Three of the four market groups broken out by RER, which merges and analyzes data received from reports, showed double-digit percent-

age increases. The top 10 markets, which racked up blockbuster increases during April and May (34.9% and 26.5%, respectively, as adjusted) again topped the other market groups in June. The June rise was 21.9%, representing a rise from \$31,683,100 in '88 to \$38,607,600 this year.

Next best growth figure for June was that of the 51-plus markets, up 15.7%. June billings were \$22,795,100 vs. \$19,709,600 the year before.

Also in the double-digit realm were the 11th-to-25th markets, which climbed from \$18,888,800 during June last year to \$21,552,700 in '89, equivalent to a 14.1% increase.

The weakest sector in June was the 26th-to-50th market group, which was up only 2.7%. The '88 and '89 figures were, respectively, \$14,001,800 and \$14,373,100.

Second quarter totals showed billings of \$307,787,200, as compared to \$263,044,900 in '88, representing a rise of 17.0%. This compares to an 8.0% climb for spot radio in the first quarter.

First half totals are \$509,116,900, up 13.3% from the \$449,389,000 billed for January-June '88.

Year-to-date figures for the four market groups show the same pattern as in June—with three of the four displaying double-digit figures for percentage growth.

After six months, the top 10 markets were up 18.0%, with billings climbing from \$169,380,800 last year to \$199,862,000 this year. This was the highest percentage of the four groups.

Ranking second in growth was the 11th-to-25th group, which rose 12.7% to \$109,797,900.

Market groups

Next was the 51-plus market group, up 10.3%. Billings were \$121,340,900 this year vs. \$110,015,400 in '88.

The poorest performance was turned in by the 26th-to-50th group. The six-month increase amounted to 7.6%, with billings rising from \$72,565,300 to \$78,116,100.

An additional breakout provided by CBS Radio Representatives showed the 51st-to-100th markets up 4% in the first half and the 100-plus markets up 16%.

June

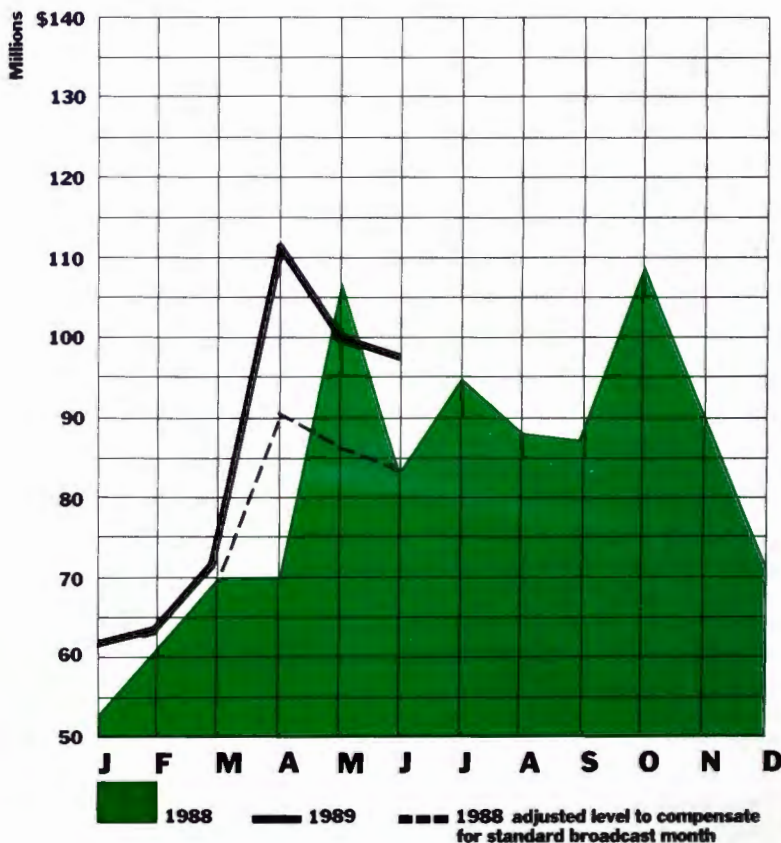
National spot +15.5%

(millions) **1988: \$84.3** **1989: \$97.3**
1988 adjusted: \$84.3

Changes by market group

| Market group | Billings (mils.) | % chg. 89-88 |
|--------------|------------------|--------------|
| 1-10 | \$38.6 | +21.9% |
| 11-25 | 21.6 | +14.1 |
| 26-50 | 14.4 | +2.7 |
| 51+ | 22.8 | +15.7 |

Source: Radio Expenditure Reports



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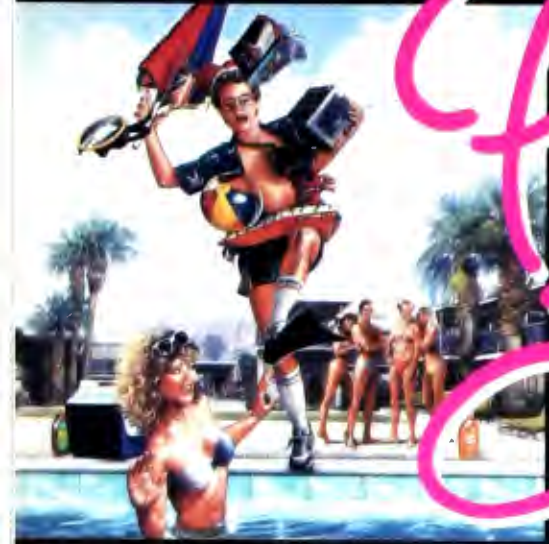


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15s are spotlighted anew as admen attack ABC's new premium charges

ABC unveils plan to cut ad clutter, sparks 15s flap

By JAMES P. FORKAN

Just as they sparked considerable controversy when they came into vogue a few years ago, 15-second commercials are the center of a new furor today, this time because of a new ABC Television Network policy that aims to reduce the number of 15s available by 20% and charge a premium for them in certain programs.

When 15s were adopted by a handful of advertisers, led by Alberto-Culver and Procter & Gamble, the TV networks grudgingly accepted the new units—grudgingly because the short form disrupted the filling of commercial pods even more so than was the case when 30s replaced 60s as the standard commercial unit in 1970. Some on both the buying and selling sides, moreover, fretted about a potential increase in commercial clutter as well as a possible loss in

creative effectiveness with the truncated commercials.

The clutter issue figures prominently in the current debate over 15s. When H. Weller "Jake" Keever, ABC Television Network's executive vice president, sales, unveiled the new 15s guidelines, he pointed to the clutter threat as the chief reason behind the change. When told many agencies see a profit motive in the new policy, Keever replies, "Believe me, networks are always suspect. But we're looking to decrease clutter. It's not good for the industry."

ABC's clutter cutters

Though announced in mid-June, the ABC policy does not take effect until Oct. 1. The rules—10 in all—affect both independent or stand-alone 15s and split 30s (two 15s run back-to-back). Under the guidelines designed to discourage wide-

Television/Radio Age

August 21, 1989

ABC is reducing the number of 15s by 20% on "attractive" primetime programs like "Monday Night Football."





"All My Children": No premiums yet.

spread use of 15s, "ABC will reduce the number of available 15 commercial positions by 20% in prime-time, news and *Good Morning America*." Billboards, hitherto available without charge to sponsors buying a certain amount of time within programs, no longer will be earned on 15s, said ABC, "nor will they count toward the fulfillment of billboard time requirements."

Moreover, the new rules state, "Single-product 30 commercials will take precedence over 15s for scheduling purposes. This could result in the 15s receiving less than equitable rotation."

Premiums will be charged for 15s placed in such programs as *Monday Night Football*, the World Series, Barbara Walters' three 1989-90 interview specials, the Academy Awards, the American Music Awards and other select specials, Keever says. There also will be "a premium charge of 5% of the gross 30 unit cost ... applied to all 'bookend' commercials." In addition, ABC added, "Theme-week segments and selective program segments in *GMA* and *Home* [in daytime] will not allow for 15s." To discourage 15s further, ABC said, "Product protection will not extend to 15s, 'road blocking' may not be possible with 15s ... [and] regionals will not be extended to independent 15s."

Keever downplays the generally negative reactions from the advertising community, saying, "It's difficult to tell" the outcome at this point. However, he notes, "We maintained our position in the up-front, and some paid the premium." Some, he concedes, opted

for 30s instead.

"I'm not sure if that's a policy or just a try" at boosting rates, says Jon Mandel, vice president and director of national broadcast at Grey Advertising. He blames the maneuver on "greed and avarice" on ABC's part. "This is the kind of thing you do when things are jumping out of control, but NBC's study indicates 15s are leveling off," he says. "ABC seems to be alone in having inventory problems, but I find it hard to believe they really are. It's simply a way to make more money," he contends.

Until now, ABC has been limiting the number of commercial units within each pod to five, regardless of length. CBS permits no more than two 15s per pod, while NBC's policy is "dictated by marketplace demand," as a Bozell report puts it.

The basic 15-second unit price on the Big 3 has been 50% of a 30. Agencies say that under the new ABC rules, the rate for 15s will rise to 55% of the 30 pricetag on the selected programs. Meanwhile, CBS' rate for 15s within NFL and NCAA football telecasts is 60% of the 30, Bozell notes.

There have been various research studies on the effectiveness of the shorter spots, with data supporting both sides of the argument. Some recall findings, for example by McCollum/Spielman, J. Walter Thompson USA and Mapes & Ross, indicate that 15s can be more than 70% as effective as 30s. However, a *Journal of Advertising Research* study seemed to support those concerned about a loss of viewer attentiveness and recall as commercial clutter grows.

John Sisk, JWT's senior vice

president, director of network negotiating, says his agency has long been "advancing 15s as very effective for our clients, even when that was not in vogue, so we are not particularly pleased" with ABC's plan to "reduce whatever advantage 15s have over 30s." Regarding the clutter issue, Sisk says, "We understand what ABC is saying" but JWT disagrees that 15s contribute significantly to clutter. "If it's a good commercial, it'll be good in the 15- or 30-second form. And if it's an annoying commercial, it'll be as annoying in a 15- or 30-second form." As a result of ABC's policy, Sisk concludes, "We'll take a hard look" at how much JWT will recommend 15s in the future. JWT's own recent study on 15s said their use seemed to be "leveling off" even before ABC's move.

Paul Schulman, president, Paul Schulman Co., agrees that ABC's strategy of putting premiums on 15s within its most attractive programs, while also "giving better deals" to clients buying 30s, makes 15s less worthwhile than they have been. Still, he emphasizes, this is "a business of negotiation, a business of supply and demand." Thus, a 15 may be offered at 50-55% of the 30 rate, but he stresses, "Fifty per cent of *what?*" is the bottom line. What were you paying for that 30? You could severely overpay for the spot, 15 or 30. It really depends on the negotiator."

Daytime is not part of ABC's new policy. That remains "part of the negotiating process," as Schulman sees it. "If you're paying \$50,000 a 30 for *General Hospital*, you're paying more than you should have," and similarly 50-55% of that for a 15 would be too high as well, he notes.

Good news/bad news

In its new "Media Directions 1989-90" report, Bozell outlines a good news/bad news scenario for 15s. The good news is that, "if properly priced, 15s offer means of stretching ad dollars," the agency says. Adding to this unit's attractiveness, Bozell notes, "On average, 15s perform about 75% as well as 30s in terms of recall." Consequently, the agency figures 15s are likely to account for 45% of all net-

work commercials by the end of 1990, up from 36% last year (See sidebar).

On the negative side, the agency reports, "Many remain skeptical and fear effects of clutter created by the 15s themselves. Very little data exists on actual current recall effects of 15s on all commercial units," Bozell continues, "but older studies using 30s show that increased commercial clutter yields a loss of attentiveness and recall."

When the networks first approved 15s, they seemed to feel that they would generate new business from accounts unable to pay the higher 30- and 60-second network rates. Most agencies now feel that has not happened to any great degree. "You can't tell if 15s brought in new business," says Grey's Mandel, "but based on our experience, it has kept brands in network TV that otherwise would've left network TV because they couldn't afford it." In Schulman's view, the networks' plan to use 15s to lure new-to-network business was "more than offset by major network advertisers who used 15s as a way to cut budgets."

Pricing outlook

As for pricing of network 15s, Bozell says that "will continue to be dictated by market conditions. In the absence of a strong seller's market, the price of 15s will hold at 50% of 30s," although networks have begun putting premiums on "high-demand vehicles" such as specials and sports events "aimed at hard to reach targets."

On the spot side, Bozell foresees "no major break" in pricing 15s. "Stable economic conditions will continue to sustain overall demand on spot inventory and high premiums. Because pricing of 10s is set at 50-60% of a 30, 15s will always be set at higher levels," Bozell points out.

ABC's 15s policy revision may well have been inspired by Bortz & Co.'s study "The Network/Affiliate Relationship, Now and in the Future," presented to the affiliates in spring of 1988. In that report, media consultant Paul Bortz said the introduction of 15s in the relatively weak 1986-87 upfront market "compounded the networks' prob-

lems... Their introduction might have been beneficial with pricing consistent with basic business economics. But 15s were introduced at half the cost of 30s—a major mistake which by our own estimates had the same effect as adding about 7% more inventory to national advertising time. What does that do in a time of low demand? Obviously, it depresses prices," Bortz stated.

"It had a major negative impact on daytime," Bortz said then, and those effects continued to worsen well into 1989. Schulman agrees that 15s proved to be "an absolute killer for daytime. They created an enormous number of avails and made daytime soft right up until this season." But the 1989-90 upfront for daytime showed a rebound to nearly \$900 million, compared to an 18% drop in upfront sales a year ago, other agency sources estimate.

Bortz told the ABC affiliates more than a year ago, "In the commodity business, sellers suffer when there's an inventory glut, and with new stations, 15-second spots and cable networks, that is what there is right now." He forecast at that time, "Maybe we'll see some pricing decisions being made over the course of the next year or two that will begin to rectify some of the problems created by the current 15-second pricing structure."

With ABC discouraging 15-second buys, some agencies say they may simply take their 15s business elsewhere. However, with fewer 15s available at ABC and thus in the overall marketplace, CBS and NBC just might hike their own 15-second rates. Since "we haven't heard much" yet from the other two networks, Sisk says, there remain two outlets for placing 15s.

Schulman is among those who expects that CBS and NBC "will follow suit," although it may be a gradual process. Tom Winner, executive vice president and media director, Campbell-Mithun-Esty, observes, "They'll wait and see what happens with ABC." But if they see there is "enough money in the marketplace" to support premiums on 15s, they eventually will go the same route as ABC, he believes. In the interim, he says, CBS and NBC may benefit by increasing the pricetags for their own 15s, given the newly tightened 15s avails picture. ABC's policy makes business sense, Winner adds, since it will "reduce clutter and increase the value of 15s to greater than 50% of 30s." Earlier this year, Mandel notes, "There was talk of [the other two networks] not selling 15s for certain categories, but the question then is you're running into restraint of trade.

"Fifteens do increase clutter, and clutter is a problem for us," Mandel continues, "but then again, all the networks have been adding commercial time here and there, very quietly," so they share the blame. Schulman, however, doubts that 15s are a major factor in the networks' ongoing ratings erosion woes. "If the networks' programming people concerned themselves with more than the September-through-April ratings race and the May sweeps, and if they instead programmed 52 weeks a year with good programming, 15s wouldn't cause erosion. Erosion allows the others [alternative media choices] to get a foot in the door in July and August, when [the networks] don't put on anything worth seeing." There was more original fare mixed in with the summer repeats in years past, he points out. □

"Good Morning America": Premiums start Oct. 1



Network promotion's new look

Intensified competition forces it beyond the screen

By **SYMON B. COWLES**

Is it coincidence, connivance or just plain cunning?

Somehow, as the three broadcast networks and the Fox programming service unveiled their promotion plans for the 1989-90 season, it became evident that there was an unusual, but common thread to all of their marketing schemes. The melodic words of the AT&T commercial, "Reach out and touch someone" has become the unofficial subtheme for the broadcast industry this year.

Reaching out, with the help of Sears, K mart, Coca Cola, and others, has become the hallmark of the broadcasting industry's promotion this season. Normally, a television network's promotion plans, as outlined at the affiliates' meeting each spring focused mainly on the on-air promotion campaign—the graphic and musical theme expressed with as much visual impact as can possibly be generated by program clips and computers. While the theme pieces are still there—from NBC, "Come home to the best"; "Get ready" for CBS; and ABC declaring that "Something's happening"—the key ingredient, at least according to the reaction at the affiliates' meetings and in the trade press, seems to be the extension beyond

the TV tube to recapture the attention of the viewing public.

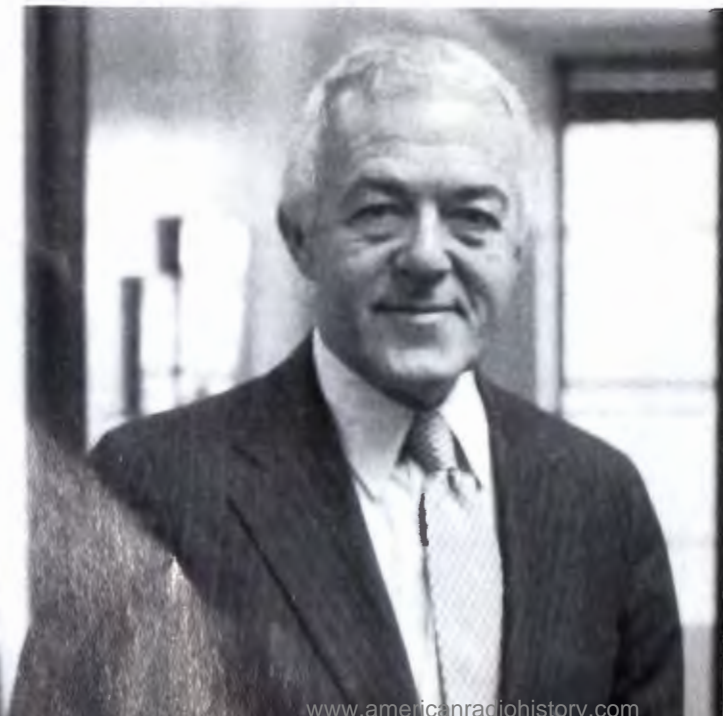
CBS was the first to announce national tie-ins with TWA and American Airlines for in-flight advertising programs, and with K mart Corp. for a national contest. The mutual promotion with the giant retailer was built around a viewers' contest on the network backed by multimedia promotions in and out of the huge string of 2,200 K mart stores. It is estimated that the new CBS program schedule will receive exposure to more than 76 million monthly K mart customers in their stores and more through the chain's own advertising efforts. In this new age of television promotion, exposure is a much sought after goal. Particularly for CBS.

As executives for the broadcast network with the relatively smallest total audience, CBS' top marketing executives, George Schweitzer and Michael Mischler, were quick to recognize their disadvantage in competing with the other networks in terms of the effective use of their own on-air promotion time. Their lower average ratings meant less reach and lower frequency of impressions per spot. While radio, print and other standard media would help, it was evident that CBS needed to find other

ways to deliver its promotional messages.

And find them they did. Having had some earlier experience using an incentive promotion to help launch *The Pat Sajak Show*, Schweitzer, CBS' senior vice president for corporate communications, felt confident that his network could offer the K mart organization the right mix of promotion enthusiasm and experience. While the key ingredient in this arrangement is an on-the-air "watch to win" contest, it will be supported by K mart in all of its stores with video and printed displays, and in its promotional publications, including the Sunday newspaper advertising supplements that are said have a circulation of about 72 million copies each week.

CBS, for its part, will promote the contest and the K mart connection with an on-air promotion campaign that will borrow a portion of Mischler's vital on-air promotion time. As vice president, advertising and promotion, it is Mischler's responsibility to maximize the use of the allotted promotion time on his network to create a desire to sample the CBS shows. "The on-air time we have committed to this phase of our campaign is roughly the equivalent of the time normally used to launch one new television



Symon B. Cowles is president of the Glen Ridge, N.J. consulting firm, Cowles & Co. He was with ABC for 22 years, the last seven of them as vice president, creative services.

series," Schweitzer explains. However, the extensive added exposure, while perhaps not as impactful as television, will certainly provide the reinforcement needed to establish what Schweitzer refers to as "brand identification" for the CBS programs.

Competitive pressure

Meanwhile, at NBC and ABC, declining overall network shares, coupled with the growing popularity of alternate entertainment sources, motivated each of them to seek new promotional opportunities as well. For John Miller, NBC's senior vice president for advertising and promotion, the Sears network of 800 stores presented such an opportunity. NBC announced its own sweepstakes contest that combined the promotional strengths of Sears along with Buick and Continental Airlines.

The NBC arrangement with Sears included extensive in-store video and printed displays and other forms of direct-to-the-consumer promotions through joint advertising insertions in catalogues, brochures and newspaper supplements. Buick will provide automobiles for the prize pool and will benefit from NBC's promotion of its product in the contest materials. Continental Airlines will provide NBC with transportation for the contest winners and in-flight exposure of special films designed to promote the NBC programs. The airline will receive promotional support on the network wherever the contest is promoted. As in the case of CBS, Miller estimates that the on-air promotion time devoted to the sweepstakes is approximately equal to the time normally devoted to introducing one new show, or approximately 750 gross rating points.

At ABC, while consideration was given to a number of different promotions with national retailers, it opted, according to Mark Zakarin, vice president, marketing for ABC Entertainment, for a special arrangement with ScreenVision Corp. This promotion will provide ABC with the ability to advertise its programs on over 5,000 movie theater screens across the country for a four week period. Under the



direction of Zakarin and Stu Brower, ABC's vice president and creative director of on-air promotion, a specially produced 60-second "mini trailer" offers ABC a natural environment for advertising television programs. Unlike in-store shoppers, movie theater attendees are in the mood for entertainment.

The core demographic for summertime movie viewing, teens and young adults, is the key audience segment for successful television programs. The ABC shows *The Young Riders* and *Anything But Love* were selected to be included in the ABC commercials because of their specific demographic appeal to movie theater attendees. In addition, this summer, the motion picture theaters are experiencing record breaking attendance figures thanks to an usually large number of hit films recently released. This provides ABC with a welcome bonus in viewers for their promos.

Working with stations

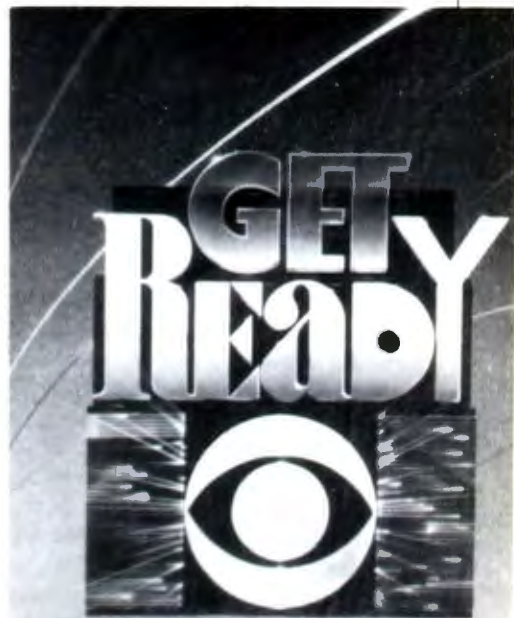
ABC also addressed the problem of extending its promotional impact by reaching out to its affiliates for some of the stations' key local promotion time. In a unique arrangement, as described by Pete Barrett, vice president affiliate advertising services, ABC stations have been asked to make promo time available to the network on a consistent basis. In return ABC has established a *quid pro quo*—in cash, in the form of a bonus payment based on the number of times the station clears one of the networks' promos.

Normally, during the summer and fall months, all networks ask for, and sometimes receive, promotional support from their affiliates in the form of local availabilities given over to network promos. This

year, and only at ABC, in order to assure promotion for its primetime programming, the network is prepared to compensate stations, out of an \$8 million dollar pool, for running the network's 30-second "line-up" spots between 6 and 8 pm. In terms of product marketing, this is television's equivalent of guaranteed point-of-purchase advertising, with the added value of sight, sound and color.

ABC, as well as the other networks, has additional cross-promotional arrangements with manufacturers of home videotape cassettes. Each network, in its own way, will provide promotional materials that it hopes will find their way into the VCRs of millions of television viewers.

Standing alone, but not without notice, are the nontraditional marketing efforts of the non-network, Fox Broadcasting Co. With it having successfully launched its weekend programming schedule, the newest challenge facing Fox, is the consolidation of its recent gains,





and the introduction of a new night of primetime programs. Another major national promotion that unites Fox and Coca Cola, will entice the American public to tune in to Fox's programs.

Using 1,000 Caribbean cruises and a \$1 million dollar grand prize as an inducement, Fox and Cola-Cola have joined together to promote the "Isle of Dreams Treasure Hunt." Through their joint efforts, wherever Coke is sold, in-store displays will spread the word about the contest. In addition, this watch-to-win contest will be advertised on 1,200 Cineplex Odeon movie screens and in theater lobby displays. Also, in another tie-in, with Westwood One Radio, a six-hour rock concert called "Isle of Dreams" will add support to the contest via a national radio network.

Fast-food deals next?

The major reach for the promotion will, of course, come from the exposure given to it on the 126 Fox stations across the country. According to Sandy Grushow, Fox's senior vice president, advertising and promotion, the on-air spots will feature a star from Fox's new show, *Booker*, as well as one of the stars of *Married With Children*. The youth appeal of these personalities is intended to capitalize on Coke's broad 18-34 age group market. Unlike the contest promos on the other broadcast networks, the Coke/Fox contest spots will gain added reach when they also air on ABC, CBS and NBC, but, of course, without reference to Fox.

For all four competing companies, there will be additional print, radio, outdoor and cable television advertising support in varying de-

grees. Each company remains open to new and different means of reaching and influencing the viewing public, with fast food chains being mentioned as the most likely to make the next deal.

And so, each of the networks and Fox have, in similar, and sometimes, unique ways, reached out to establish new pipelines of promotion. In effect, they have all established new distribution systems for their marketing messages. And so, once again, as in season's past, the end result will come down to *how* the media is used. All promotional things being equal, *creativity*, that most unmeasurable of dimensions, will be the determining factor in weighing the success of the campaigns.

As each of the broadcasters positions its promotional artillery, consideration must be given not only to the weight of the barrage but also to its accuracy. Are 76 million shoppers equal to or greater than the 24 million ticket-buying entertainment seekers in 5,000 movie theaters? The answer will probably never be known. Considering the myriad factors that are involved in successfully marketing a television season, the number of contest entries, increased store traffic, and even the Nielsen ratings will not provide a definitive answer. However, with the broadcasting industry facing a new fall season undisturbed by political conventions, international Olympics, or labor strikes, the combination of traditional and special promotion should go a long way in generating a heightened sense of anticipation about this season's television programming.

This is one element that has been lacking in television promotion for a number of years—a nationwide

excitement that promises the viewer a bright, new season. Given that state of mind, creatively effective promotion can then be translated into the desire to try the new shows or revisit old favorites. That is the true function of television promotion for the new season—to create sampling. If a sufficient number of people tune in to a TV show in order to win a contest and they sample the program at the same time, then the promotion will have paid off.

It has been said that the two most powerful words in advertising are, "free" and "new." If the promotional efforts of ABC, NBC, CBS and Fox do nothing more than create a *new* awareness of *free* commercial television as the primary entertainment choice of the American people, then the effort has been worthwhile.

But it should do more. Beginning with the generic, thematic promotions being run by the networks throughout the summer, the audience has been treated to three campaigns that proclaim, "Get ready" because "Something's happening" and we want you to "Come home to the best." The "best" in this case might turn out to be the medium of free TV.

Why promote networks?

While each of those themes belongs to different networks, it is true that the collective message will probably work as well for the industry as it does for any of the individual networks. It is axiomatic in the industry that people don't watch networks or even stations. They certainly don't watch slogans. They watch *programs*. Then, why do the networks, and many stations, continue to develop and promulgate theme promotions? It is done as much to generate affiliate enthusiasm, as it is for convenience.

The graphic and musical elements that embody the theme are used to produce the openings and closings for "donut" styled promos: a thematic opening, followed by program clips, and ending with a reprise of the theme. In the course of a year, each network will produce thousands of individual spots of all types. Donuts make the job

easier while providing a sense of stylized consistency. In addition, when this material is made available to the affiliated stations, it can be used to promote local programming that will carry the subtle identification of the network in the music and graphics. This format represents the workhorse concept for on-air promotion.

However, in this season of change, little has really been altered in regard to the network theme promotions. The three networks produced their films with great verve and energy. NBC and ABC produced their theme pieces to the satisfaction of their affiliates. CBS, while playing catch-up following a calamitous promotion introduction last season, managed to use its promotion efforts to regenerate affiliate enthusiasm. Each network's campaign involved graphic gymnastics produced by state-of-the-art computer animation—some linear, some textured, all three dimensional, strong musical backgrounds—all upbeat, and galaxies of stars and would-be luminaries.

Qualitative parity?

At a presentation of all the networks' campaigns during the Broadcast Promotion & Marketing Executives convention in Detroit, each was greeted with appreciative, albeit partisan, applause from the assembled promotion executives. The qualitative differences, if any exist, will remain forever in the eyes and ears of the beholders. It is reported, perhaps facetiously, that the programming heads of the three networks each prefer the work of the other two networks to their own promotion department's efforts. But all must be relieved that this phase of the new season introduction is over.

Beyond the generic elements, each of the networks and Fox, as well, will devote a far greater effort, and portion, of their on-air time, to specific show promos. In the case of Fox, the task is simpler, yet more intricate. In addition to reinforcing its growing popularity on the weekend, Fox needs to introduce a new night, Monday, to its lineup. From a marketing point of view, the decision was made to forego slogans or

themes and to focus directly on the shows with specific TV, radio and print advertising designed to highlight the essence of the Fox programs. Once having established their theme ideas, the three networks have also indicated that a concentrated effort will follow to promote the individual shows on their own merits.

Enter marketing

While traditional approaches to promos dictate using footage, or clips, more and more spots are being *produced as commercials*. It is still expected that most of the promos used to introduce the new programs will employ actual scenes; however, many key marketing points will be made by means of specially scripted and filmed spots. CBS, for example, addressed its problem of competing against the male dominated programming on Monday night by creating and producing a spot designed to call attention to the women's appeal of its own programming.

The spot is humorous, in a satiric vein, and thoroughly engaging. Although, as a promotion technique it is not new, it is important to note that all of the network broadcasting companies, and many stations today, are turning to original creative ideas to reach their audiences. As a result, this promises to be the year of the creative challenge for promotion—to discover, write and produce original promotion ideas. There is every indication, at least at the national level, that a maximum effort in this direction is being planned. Originality seems to be the byword in promotion this year.

Outside resources

In order to achieve maximum success in this phase of their work, the marketing executives at the each of the companies has recognized the necessity to reach out once again, in this case, to creative resources outside of their own departments for fresh ideas and new skills. Chuck Blore, head of his own creative services company and veteran writer-producer of TV and radio promotion, has been credited with creating the style of promos



that has spread throughout the industry. He sees this trend as a "natural response to the saturation of advertising messages that bombard the consumer in all media."

"Promos that simply provide program information become part of the wallpaper of television messages," he explains. "There needs to be an element of memorability built into the spots or ads to make them stand out. My own approach is to address the marketing problem from the perspective of the viewer rather than the advertiser."

The net result is television advertising that seems to work on an emotional level through the device of humor warmth or drama. The benefit of such innovative work accrues to the broadcaster through heightened awareness on the part of the viewer of the advertising message. For the public, the rewards are promos with the values of entertainment added to the promotion breaks.

The combination of new promotions and specialized creative techniques mark this season as potentially one of the most aggressive in broadcast history. Motivated by competition, broadcasters appear to have responded to the challenge of finding new ways and means of communicating with the American television audience. □

Examination of May Arbitron figures for top ADIs reveals 1.5 point drop

Major market TV erosion analysis shows continuation

By ALFRED J. JAFFE

Is the glass half full or half empty? Is erosion of TV broadcast audiences a challenge to stations and networks to improve programming or is it a termite destroying the sinews of broadcast TV? That is to say, is erosion easing or will it continue for the foreseeable future?

These questions are again raised by the latest semi-annual analysis of major market TV audiences by TV/RADIO AGE. These analyses, covering the top 50 ADIs during the November and May Arbitron sweeps, have shown varying degrees of erosion during the '80s. In the latest, May, sweep there was a continuation of the trend with a drop a little greater than the average for the previous five years. There was even a slight drop in audience share among independents.

The half-full glass

On the other hand (the glass is half full), the declines in audience shares among major market broadcast stations during recent years has been relatively small. And, if Arbitron is to be believed, commercial TV stations in the top 50 ADIs still have three quarters of the audience in those markets. During the past five years, the share drop in household viewing was all of five percentage points—one percentage point a year, on average.

The latest TV/RADIO AGE analysis concentrates on the top 50 markets. Affiliate and independent leaders, in terms of household shares, have been culled from Arbitron reports covering the total day and two key dayparts. There are also multiple lists of affiliate leaders by network.

Of more general interest is the listing of all affiliates and indies in the top 50 markets with viewing recorded by Arbitron. These show household shares for the total day during the latest May sweep and three previous sweeps, including the year-ago one. There are also shares shown for early fringe and the late news period.

The bottom line on erosion in the May sweep is that the top 50 ADIs averaged a drop of 1.5 points in household shares, sign-on to sign-off, unweighted by market size. This is not exactly insignificant as a 50-market average. And it is not likely to be a fluke, with the average share bouncing back next May. There has been an annual decline in top 50 market shares of commercial broadcast stations in both the November and May sweeps through the '80s, through in some cases it has been relatively small.

In May of '88, the 50-market average was down 0.42 of a point, with increases of indie shares averaging about a point per market offsetting the affiliate share drop of 1.5 points per market. In the previous year, the per-market average was down 1.52 points; in '86, it was down 0.48 of a point; in '85, the decline amounted to 0.68 of a point; in '84, the drop was 2.0 points, as it

was in '83.

The average share of commercial TV stations in the top 50 markets this past May came to 76.9. This compares with 81.9 in May '84. Not a tremendous drop, but not to be ignored.

An affiliate problem

The erosion in the top 50 markets is confined basically to affiliates. During May '89, affiliates were down 1.26 points per average market from the previous May. This was a little less than the two previous Mays—down 1.5 and 1.66 points in '88 and '87, respectively. May of '86 was essentially flat, but '85 was down 1.22 points, affiliates in '84 dropped 3.2 points and 2.3 points in '83.

Affiliate shares averaged 61.14 points this past May. Five years previously, the level was 67.3, again, not a tremendous drop but ominous in its consistency.

In an exception, independent shares per average top-50 market were off a little in May. The drop was only 0.24 of a point and followed an increase of 1.08 points in '88. There hasn't been much of an increase in indie shares in recent years in the top 50 markets, according to Arbitron, whatever the story in the smaller markets.

Indie per-market shares in '87 were up an average of only 0.14 of a point, down 0.38 of a point in '86, up 0.6 of a point in '85, up 1.2 points in '84 and up 0.4 of a point in '83. From '84 to '89, indie shares per market went up from an average of 14.6 to 15.76.

There are a number of reasons for this small increase, which sounds inconsistent with reports of independent station gains. Firstly, most of the top 50 markets have

Top 10 affiliates in top 50 markets—total day

Leading station shares, Mon.—Sun., sign-on to sign-off

By ADI HH shares

| | | |
|-------------------------------------|------------|----|
| New Orleans | WWL-TV(C) | 35 |
| * Harrisburg-York-Lancaster-Lebanon | WGAL-TV(N) | 30 |
| Nashville | WSMV(N) | 30 |
| St. Louis | KSDK(N) | 30 |
| * Charlotte | WBTV(C) | 29 |

| | | |
|-------------------------------------|------------|----|
| Greensboro-Winston-Salem-High Point | WFMY-TV(C) | 29 |
| Memphis | WMC-TV(N) | 29 |
| * Raleigh-Durham | WTVD(A) | 29 |
| Greenville-Spartanburg-Asheville | WYFF-TV(N) | 28 |
| * Louisville | WHAS-TV(C) | 28 |

mature independent stations, whose gains are mixed with losses. Secondly, the few markets which in recent years saw indies for the first time in the top 50 ADIs tended to bring down the average. Thirdly, Arbitron in recent years has not been pushing household meters in new markets, unlike Nielsen, preferring to prepare for its local (and national) people meter incorporating product purchase information. Meters almost invariably show higher viewing shares for indies than diaries do. It's likely that an analysis would show greater indie gains in the top 50 markets for Nielsen than Arbitron, but, on the other hand, Arbitron data are more comparable over the years.

The impact of meters and the differences between Arbitron and Nielsen are dramatically pointed up in the May sweeps, when Nielsen launched meter measurement in three markets—St. Louis, Phoenix and Milwaukee. According to Nielsen, respective affiliate shares were down seven, nine and six household points, while respective indie shares were up two, four and five points, compared to May '88. The comparable affiliate shares via Arbitron were: down two points, up one point and down one point. Indie shares, according to Arbitron, were down two, no change and up two points, respectively.

The fact that most of the top 50 markets have mature indies is doubly true in the top 10 markets, where the drop in indie shares per market was a little more pronounced than in the 11th-to-25th markets or the second 25 markets.

The per-market drop in indie shares in the top 10 ADIs came to 0.9 of a point, compared to a small rise of 0.2 of a point for indies in the 11th-to-25th markets and small drop of 0.24 of a point in the second 25 market group.

Indies down in Dallas

The most pronounced May-to-May decline for indies was in Dallas-Ft. Worth, where four of the five indies with recorded viewing were down in sign-on to sign-off household shares. Individually, they were not down by much. Three of the four were down by only a point and one—Fox-owned

Top 10 affiliates in top 50 markets—early fringe

Leading station shares, Mon.–Fri., 4:00–7:30 pm/3:00–6:30 pm

By ADI HH shares

| | | |
|---------------------------------|------------|----|
| New Orleans | WWL-TV(C) | 40 |
| Nashville | WSMV(N) | 39 |
| Memphis | WMC-TV(N) | 38 |
| * Raleigh-Durham | WTVD(A) | 37 |
| * Birmingham | WBRC-TV(A) | 36 |
| * Charlotte | WSOC-TV(A) | 35 |
| * Louisville | WHAS-TV(C) | 35 |
| Orlando-Daytona Beach-Melbourne | WFTV(A) | 35 |
| St. Louis | KSDK(N) | 35 |
| Milwaukee | WTMJ-TV(N) | 33 |

By ADI shares, women 25–54

| | | |
|----------------------|------------|----|
| * Charlotte | WSOC-TV(A) | 42 |
| New Orleans | WWL-TV(C) | 42 |
| * Raleigh-Durham | WTVD(A) | 42 |
| Nashville | WSMV(N) | 41 |
| Baltimore | WJZ-TV(A) | 38 |
| Detroit | WXYZ-TV(A) | 38 |
| * Louisville | WHAS-TV(C) | 38 |
| Milwaukee | WTMJ-TV(N) | 38 |
| Minneapolis-St. Paul | KSTP-TV(A) | 38 |
| St. Louis | KSDK(N) | 36 |

* Intermixed affiliate market

Top 10 affiliates in top 50 markets—late news

Leading station shares, Mon.–Fri., 11:00–11:30 pm/10:00–10:30 pm

By ADI HH shares

| | | |
|-------------------------------------|------------|----|
| * Harrisburg-York-Lancaster-Lebanon | WGAL-TV(N) | 40 |
| New Orleans | WWL-TV(C) | 40 |
| San Antonio | KENS-TV(C) | 40 |
| * Birmingham | WVTM(N) | 39 |
| St. Louis | KSDK(N) | 39 |
| * Dayton | WHIO-TV(C) | 38 |
| Sacramento-Stockton | KCRA-TV(N) | 38 |
| * Raleigh-Durham | WTVD(A) | 36 |
| Columbus, O. | WCMH-TV(N) | 35 |
| Baltimore | WJZ-TV(A) | 34 |
| * Charlotte | WSOC-TV(A) | 34 |
| Cincinnati | WLWT(N) | 34 |
| * Louisville | WHAS-TV(C) | 34 |
| Salt Lake City | KSL-TV(C) | 34 |

By ADI shares, women 25–54

| | | |
|-------------------------------------|------------|----|
| San Antonio | KENS-TV(C) | 42 |
| * Harrisburg-York-Lancaster-Lebanon | WGAL-TV(N) | 41 |
| Sacramento-Stockton | KCRA-TV(N) | 41 |
| * Birmingham | WVTM(N) | 39 |
| * Louisville | WHAS-TV(C) | 39 |
| * Raleigh-Durham | WTVD(A) | 39 |
| St. Louis | KSDK(N) | 39 |
| Greenville-Spartanburg-Asheville | WYFF-TV(N) | 38 |
| New Orleans | WWL-TV(C) | 38 |
| Columbus, O. | WCMH-TV(N) | 37 |

* Intermixed market

KDAF(TV)—was down by two, but the combination reduced the indie share total from 33 to 28. Over the same period, the affiliates were up a net of one share point. Clearly, not a typical picture.

Another marked decline in overall indie market share was in San Francisco, where indies were down by four share points. But 75% of this loss was due to KDTV(TV), a Univision affiliate, which had a share of three in May '88 but did not make the sign-on to sign-off minimum this past May.

In three of the top 10 ADIs, the indie household market share was down by two. These three were

Boston, Washington and Houston.

Interestingly, the top four markets were all up in indie shares. New York was up three points; Los Angeles, two; Chicago and Philadelphia, one each. As noted, the mixture of ups and downs is characteristic of mature markets.

Also to be noted again is the fact that the market averages are not weighted. The average decline estimate of 0.9 of a point per market by indies in the top 10 markets would come out differently if the size of each market was taken into account. In these analyses, however, the average market performance is what is measured.

Top 5 independents in top 50 markets—total day

Leading station shares, Mon.—Sun., sign-on to sign-off

By ADI HH shares

| | | |
|----------------|---------|----|
| Washington | WTTG | 17 |
| Chicago | WGN-TV | 15 |
| New York | WNYW | 14 |
| St. Louis | KPLR-TV | 14 |
| Portland, Ore. | KPTV | 13 |
| San Francisco | KTVU | 13 |

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* Intermixed affiliate market

Top 5 independents in top 50 markets—early fringe

Leading station shares, Mon.—Fri., 4:00–7:30 pm/3:00–6:30 pm

By ADI HH shares

| | | |
|----------------------|---------|----|
| Washington | WTTG | 21 |
| New York | WNYW | 18 |
| Portland, Ore. | KPTV | 16 |
| Minneapolis-St. Paul | KMSP-TV | 15 |
| Detroit | WKBD | 14 |
| Los Angeles | KTTV | 14 |
| Miami | WSVN | 14 |

By ADI shares, women 25–54

| | | |
|----------------|---------|----|
| Portland, Ore. | KPTV | 17 |
| Miami | WLTW | 16 |
| Phoenix | KPHO-TV | 15 |
| Detroit | WKBD | 14 |
| New York | WNYW | 14 |

Top 5 independents in top 50 markets—late news

Leading station shares, Mon.—Fri., 11:00–11:30 pm/10:00–10:30 pm

By ADI HH shares

| | | |
|---------------|---------|----|
| Los Angeles | KTLA | 18 |
| St. Louis | KPLR-TV | 17 |
| Washington | WTTG | 14 |
| New Orleans | WNOL-TV | 13 |
| San Francisco | KTVU | 13 |

By ADI shares, women 25–54

| | | |
|----------------|---------|----|
| Los Angeles | KTLA | 21 |
| Portland, Ore. | KPTV | 20 |
| Baltimore | WBFF | 13 |
| Miami | WSVN | 13 |
| New Orleans | WNOL-TV | 13 |
| St. Louis | KPLR-TV | 13 |
| Washington | WTTG | 13 |

Source: Arbitron, May 1989

As for affiliates in the top 10 markets, there were declines in every one of the top five, with New York, Los Angeles and Chicago down three points each and Philadelphia down four points. The only market in which affiliates showed a sizeable gain among the top 10 was Boston, up three points. In the bottom half of the top 10, affiliates in Washington were down three points.

The per-market share averages for the other market groups broken out in the TV/RADIO Age analysis come out as follows: the 11th-to-25th market group was down 1.27 points while the second 25 market group was off 1.36 points.

It should be apparent that the averages cover a variety of situations. In the top 50 ADIs, overall market shares were up in 10 cases, down in 32 and flat in eight others. In the case of indie shares alone in the top 50, 15 markets were up, 21 were down and 14 showed no change. The affiliate picture looks this way: 10 markets up, 30 down and 10 flat. In the top 10 markets there were seven down, one up and two flat.

The sad tales of bankruptcies among the indies hasn't stopped new call letters from appearing, though the rate of debuts has slowed. In May '89, the Arbitron books showed 121 indies with re-

corded viewing in the top 50 ADIs and a total of 236 indies listed. This compares with 119 and 227, respectively, during the previous May. Back in '84, the numbers were 97 and 161.

Indies in top 10

However, in the top 10 markets, indie problems had their impact. There were 39 indies with recorded viewing in May '89, '88 and '87, while the total number of indies listed by Arbitron was 71 in '87, jumped up to 80 in '88 and fell back to 76 this past May.

Another facet of the TV/RADIO AGE analysis is the trend having to do with the ranking of affiliates by market, i.e., in how many markets each network's affiliates are first, second or third.

During May '89, both NBC and CBS had 19 stations that were first in their markets, sign-on to sign-off, in the top 50 ADIs. This included four ties for NBC and two for CBS. ABC had 16 No. 1s. This did not differ much from '88.

In the top 10 markets, where ABC-owned stations and affiliates have been strong historically, the network's affiliates were down from eight to seven first places, while NBC was up from two to three first places, including one tie with ABC.

CBS, whose main strength in the top 50 markets lies in the 21st-to-50th ADIs, had one top 10 market leader—WUSA(TV) Washington—, four in second place—with two ties—and five in third place, according to Arbitron.

This was an improvement for CBS in the top 10 markets, where last year it had one affiliate (WUSA) in first place, two in second and seven in third. However, CBS O&Os are not doing so well this time around.

Three of them are looking at the hindquarters of an independent station, two in the top 10 markets. In New York, WCBS-TV is one share point behind Fox's WNYW(TV), sign-on to sign-off; in Chicago, WBBM-TV fell behind WGN-TV by one share point, and in Miami CBS' newly-acquired WCIX-TV, while up from May '88, is behind WSVN(TV), an indie and former NBC affiliate.

Top 5 affiliates in top 50 markets—total day—by network

By ADI homes share

| ABC | | | CBS | | | NBC | | |
|------------------|---------|----|-------------------------------------|---------|----|-------------------------------------|---------|----|
| * Raleigh-Durham | WTVD | 29 | New Orleans | WWL-TV | 35 | * Harrisburg-York-Lancaster-Lebanon | WGAL-TV | 30 |
| * Birmingham | WBRC-TV | 27 | * Charlotte | WBTV | 29 | Nashville | WSMV | 30 |
| * Charlotte | WSOC-TV | 26 | Greensboro-Winston Salem-High Point | WFMY-TV | 29 | St. Louis | KSDK | 30 |
| Baltimore | WJZ-TV | 25 | * Louisville | WHAS-TV | 28 | Memphis | WMC-TV | 29 |
| Orlando-Daytona | WFTV | 25 | Pittsburgh | KDKA-TV | 27 | Greenville-Spartanburg-Asheville | WYFF-TV | 28 |
| Beach-Melbourne | | | | | | | | |

Top 5 affiliates in top 50 markets—early fringe—by network

By ADI homes share

| ABC | | | CBS | | | NBC | | |
|------------------|---------|----|-------------------------------------|---------|----|----------------------------------|---------|----|
| * Raleigh-Durham | WTVD | 37 | New Orleans | WWL-TV | 40 | Nashville | WSMV | 39 |
| * Birmingham | WBRC-TV | 36 | * Louisville | WHAS-TV | 35 | Memphis | WMC-TV | 38 |
| * Charlotte | WSOC-TV | 35 | Pittsburgh | KDKA-TV | 32 | St. Louis | KSDK | 35 |
| Orlando-Daytona | WFTV | 35 | Greensboro-Winston Salem-High Point | WFMY-TV | 30 | Milwaukee | WTMJ-TV | 33 |
| Beach-Melbourne | | | Oklahoma City | KWTV | 30 | Greenville-Spartanburg-Asheville | WYFF-TV | 30 |
| Baltimore | WJZ-TV | 31 | | | | | | |
| Buffalo | WKBW-TV | 31 | | | | | | |
| Philadelphia | WPVI-TV | 31 | | | | | | |

Top 5 affiliates in top 50 markets—late news—by network

By ADI homes share

| ABC | | | CBS | | | NBC | | |
|------------------|---------|----|----------------|---------|----|-------------------------------------|---------|----|
| * Raleigh-Durham | WTVD | 36 | New Orleans | WWL-TV | 40 | * Harrisburg-York-Lancaster-Lebanon | WGAL-TV | 40 |
| Baltimore | WJZ-TV | 34 | San Antonio | KENS-TV | 40 | * Birmingham | WVTM | 39 |
| * Charlotte | WSOC-TV | 34 | * Dayton | WHIO-TV | 38 | St. Louis | KSDK | 39 |
| * Birmingham | WBRC-TV | 32 | * Louisville | WHAS-TV | 34 | Sacramento-Stockton | KCRA-TV | 38 |
| Denver | KUSA-TV | 30 | Salt Lake City | KSL-TV | 34 | Columbus, O. | WCMH-TV | 35 |

Source: Arbitron, May 1989. * Intermixed affiliate market. Total day is sign-on to sign-off, Monday-Sunday. Early fringe and late news are Monday-Friday.

(Continued on next page)

TV station shares, May 1989, top 50 ADIs

Shares of commercial stations ranked within markets by sign-on to sign-off household shares. Markets ranked by Arbitron TV household totals, January 1, 1989.

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|---------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| New York (1) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WABC-TV/A | 19 | 19 | 19 | 20 | 29 | 21 | 22 | 17 |
| WNBC-TV/N | 16 | 16 | 17 | 16 | 11 | 11 | 19 | 19 |
| WNYW//F | 14 | 13 | 13 | 13 | 14 | 11 | 8 | 11 |
| WCBS-TV/C | 13 | 13 | 14 | 15 | 7 | 11 | 14 | 14 |
| WWOR-TV/I | 11 | 9 | 9 | 10 | 11 | 11 | 6 | 8 |
| WPIX/I | 9 | 9 | 9 | 9 | 7 | 11 | 11 | 11 |
| WXTV/I | 3 | 2 | 3 | 2 | 4 | 5 | — | — |
| WNJU/I | 2 | 2 | 2 | 2 | 4 | 5 | — | — |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|------------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Los Angeles (2) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| KNBC-TV/N | 16 | 17 | 16 | 16 | 11 | 12 | 21 | 21 |
| KABC-TV/A | 15 | 15 | 18 | 18 | 14 | 12 | 17 | 14 |
| KCBS-TV/C | 13 | 13 | 12 | 13 | 7 | 8 | 10 | 7 |
| KTLA/I | 10 | 10 | 11 | 10 | 7 | 8 | 21 | 21 |
| KTTV//F | 10 | 9 | 9 | 9 | 11 | 12 | 7 | 4 |
| KCOP/I | 8 | 9 | 10 | 10 | 7 | 4 | 7 | 7 |
| KHU-TV/I | 7 | 8 | 7 | 7 | 11 | 8 | — | — |
| KMEX-TV/I | 4 | 4 | 3 | 4 | 7 | 4 | — | — |
| KVEA-TV/I | 3 | 2 | 2 | — | 4 | 4 | 3 | 7 |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|--------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Chicago (3) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WLS-TV/A | 23 | 24 | 24 | 23 | 22 | 15 | 21 | 20 |
| WMAQ-TV/N | 16 | 15 | 17 | 18 | 13 | 8 | 27 | 27 |
| WGN-TV/I | 15 | 14 | 14 | 14 | 13 | 15 | 6 | 11 |
| WBBM-TV/C | 14 | 14 | 16 | 15 | 13 | 15 | 19 | 18 |
| WFLD//F | 8 | 9 | 9 | 9 | 13 | 8 | 4 | 5 |
| WPWR-TV/I | 6 | 6 | 5 | 5 | 4 | — | 4 | 5 |
| WGBO-TV/I | 3 | 3 | 3 | 3 | 4 | — | 2 | — |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|-------------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Philadelphia (4) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WPVI-TV/A | 23 | 23 | 24 | 25 | 32 | 30 | 25 | 24 |
| KYW-TV/N | 16 | 17 | 16 | 18 | 11 | 9 | 20 | 16 |
| WCAU-TV/C | 16 | 15 | 17 | 16 | 14 | 13 | 18 | 14 |
| WTFX-TV//F | 10 | 10 | 9 | 9 | 11 | 13 | 8 | 8 |
| WPHL-TV/I | 6 | 5 | 5 | 5 | 4 | 4 | 5 | 3 |
| WGBS-TV/I | 4 | 4 | 4 | 5 | — | — | 3 | 3 |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|--------------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| San Francisco (5) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| KGO-TV/A | 16 | 17 | 18 | 17 | 16 | 14 | 13 | 17 |
| KPIX/C | 15 | 15 | 16 | 15 | 16 | 14 | 20 | 17 |
| KRON-TV/N | 15 | 15 | 16 | 16 | 12 | 10 | 20 | 17 |
| KTVU//F | 13 | 12 | 11 | 13 | 12 | 10 | 10 | 7 |
| KBHK-TV/I | 7 | 7 | 7 | 7 | 4 | 5 | 7 | 7 |
| KOFY-TV/I | 4 | 5 | 5 | 5 | 4 | 5 | — | — |
| KICU-TV/I | 3 | 3 | 3 | 3 | — | — | — | — |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|-------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Boston (6) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WBZ-TV/N | 20 | 20 | 22 | 20 | 16 | 20 | 27 | 26 |
| WCVB-TV/A | 20 | 20 | 20 | 18 | 28 | 20 | 27 | 19 |
| WNEV-TV/C | 15 | 15 | 14 | 14 | 12 | 15 | 17 | 10 |
| WSBK-TV/I | 7 | 6 | 6 | 7 | 8 | 5 | 3 | 10 |
| WLVI-TV/I | 5 | 6 | 5 | 5 | — | — | 3 | 3 |
| WFXT//F | 4 | 4 | 4 | 5 | — | — | 3 | — |
| WQTV/I | 2 | 3 | 3 | 3 | — | — | — | — |
| * WMUR-TV/A | 2 | 2 | 2 | 2 | — | 5 | — | — |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|--------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Detroit (7) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WDIV/N | 23 | 23 | 23 | 23 | 17 | 20 | 26 | 29 |
| WXYZ-TV/A | 22 | 22 | 22 | 21 | 38 | 30 | 26 | 23 |
| WJBK-TV/C | 16 | 15 | 16 | 16 | 10 | 10 | 14 | 14 |
| WKBD//F | 12 | 12 | 12 | 13 | 14 | 10 | 12 | 9 |
| WXON/I | 9 | 9 | 10 | 9 | 3 | 5 | 5 | 3 |

* Located in Manchester, N.H.

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|-----------------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Dallas-Ft. Worth (8) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WFAA-TV/A | 23 | 22 | 23 | 21 | 35 | 29 | 30 | 29 |
| KDFW-TV/C | 17 | 18 | 19 | 18 | 12 | 12 | 18 | 15 |
| KXAS-TV/N | 16 | 17 | 16 | 16 | 12 | 18 | 20 | 21 |
| KTVT/I | 10 | 10 | 12 | 11 | 8 | 12 | 6 | 6 |
| KTXA-TV/I | 6 | 5 | 5 | 6 | 4 | 6 | 6 | 4 |
| KDAF//F | 5 | 5 | 5 | 7 | 4 | — | 4 | 2 |
| KXTX-TV/I | 4 | 4 | 5 | 5 | 4 | — | — | 2 |
| KDFI-TV/I | 3 | 3 | 3 | 4 | — | — | 2 | 2 |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|-----------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Washington (9) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WUSA/C | 18 | 19 | 20 | 20 | 22 | 21 | 23 | 15 |
| WJLA-TV/A | 17 | 17 | 19 | 19 | 13 | 16 | 17 | 15 |
| WTTG//F | 17 | 17 | 17 | 18 | 13 | 11 | 13 | 15 |
| WRC-TV/N | 16 | 16 | 17 | 15 | 13 | 16 | 23 | 26 |
| WDCA-TV/I | 5 | 6 | 5 | 6 | 4 | 5 | 7 | 7 |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|---------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Houston (10) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| KTRK-TV/A | 22 | 24 | 25 | 24 | 26 | 32 | 29 | 28 |
| KPRC-TV/N | 16 | 16 | 16 | 14 | 15 | 16 | 19 | 19 |
| KHOU-TV/C | 15 | 16 | 16 | 15 | 19 | 16 | 17 | 13 |
| KTXH/I | 9 | 9 | 7 | 9 | 4 | 5 | 8 | 9 |
| KHTV/I | 8 | 9 | 8 | 7 | 7 | 5 | 6 | 6 |
| KRIV//F | 8 | 8 | 8 | 9 | 7 | 5 | 2 | 2 |
| KXLN-TV/I | 2 | 2 | 2 | 4 | — | — | 2 | 2 |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|-----------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Cleveland (11) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WJW-TV/C | 21 | 23 | 20 | 21 | 23 | 24 | 33 | 30 |
| WEWS/A | 21 | 21 | 23 | 23 | 23 | 19 | 19 | 19 |
| WKYC-TV/N | 17 | 17 | 19 | 17 | 16 | 14 | 24 | 22 |
| WUAB/I | 10 | 10 | 11 | 11 | 10 | 10 | 5 | 8 |
| WOIO//F | 8 | 8 | 8 | 8 | 6 | 5 | 2 | 3 |
| * WAKC-TV/A | 2 | 2 | 2 | 2 | — | — | — | 3 |
| WBNX-TV/I | 2 | 2 | 1 | — | — | — | — | — |

* Located in Akron-Canton

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|---------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Atlanta (12) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WXIA-TV/N | 20 | 21 | 21 | 21 | 16 | 17 | 26 | 23 |
| WAGA-TV/C | 20 | 19 | 19 | 18 | 19 | 22 | 26 | 21 |
| WSB-TV/A | 19 | 19 | 21 | 20 | 28 | 22 | 21 | 18 |
| WTBS/I | 11 | 10 | 10 | 12 | 6 | 9 | 5 | 10 |
| WATL//F | 10 | 10 | 8 | 8 | 6 | 4 | 5 | 8 |
| WGNX/I | 6 | 6 | 7 | 8 | 3 | — | 5 | 5 |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|----------------------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Minneapolis-St. Paul (13) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WCCO-TV/C | 25 | 25 | 25 | 24 | 23 | 20 | 28 | 25 |
| KSTP-TV/A | 20 | 21 | 21 | 19 | 38 | 20 | 20 | 20 |
| KARE/N | 19 | 19 | 21 | 20 | 15 | 20 | 35 | 35 |
| KMSP-TV/I | 12 | 12 | 12 | 15 | 8 | 10 | 5 | 5 |
| KITN//F | 5 | 5 | 4 | 4 | — | — | 3 | 5 |

| | Mon-Sun, Sign-on/sign-off Households | | | | M-F 4-7:30 p.m. | | M-F 11-11:30 p.m. | |
|-------------------|--|-------|-------|-------|--------------------|-------|----------------------|-------|
| | M '89 | F '89 | N '88 | M '88 | W | M | W | M |
| Miami (14) | | | | | 25-54 | 25-54 | 25-54 | 25-54 |
| WPLG/A | 18 | 18 | 20 | 18 | 23 | 26 | 21 | 23 |
| WTVJ/N | 15 | 15 | 14 | 15 | 10 | 9 | 21 | 18 |
| WSVN//F | 12 | 12 | 18 | 17 | 10 | 13 | 13 | 10 |
| WCIX-TV/C | 9 | 9 | 5 | 7 | 3 | 4 | 8 | 5 |
| WBFS-TV/I | 7 | 8 | 7 | 7 | 6 | 9 | 3 | 5 |
| WLTN/I | 7 | 6 | 6 | 8 | 16 | 9 | 5 | 3 |
| WDZL/I | 6 | 6 | 6 | 5 | 3 | 4 | — | 3 |
| WSCV/I | 3 | 4 | 3 | 2 | 3 | 4 | 5 | 5 |

(Continued on page 58)

Viewpoints

Elmo Ellis



Retired vice president, Cox Enterprises and general manager, WSB-AM-FM Atlanta. Now a newspaper columnist, radio commentator and president of Elmo Ellis Productions, Atlanta

Reflections on what radio had then that it doesn't have now

"What did you like to watch on television when you were a little boy?" That question the other day from a neighborhood youngster required an explanation that TV wasn't widely available when I was a kid. Instead of gazing at images on a screen, we listened to radio and created our own mental pictures.

Radio was a marvelous magic carpet back in those days. It could fly you in a split second to any place on earth, or in the case of astronaut Buck Rogers, to even the most remote planets of outer space. Music, sound effects and the human voice—these were the only tools that radio relied on to develop its repertoire of reality and fiction—past, present and future.

Many nights I would roam the radio dial, monitoring a plethora of comedy and variety shows, plays, sports events, newscasts and big band remotes. One of my favorite orchestra leaders was Tommy Tucker, who recorded scores of hits songs including, "I Don't Want to Set the World on Fire," and a naughty but nifty tune called, "The Man Who Comes Around." His top vocalist, Wee Bonnie Baker, also had several big sellers, particularly the novelty, "Oh, Johnnie, Oh."

Personal medium

Not long ago I read about the Maestro's death, at the age of 86, in Sarasota, Fla. The obituary noted that after big bands began to lose popularity, Tucker pursued a second career in education, teaching music at Monmouth College in New Jersey for 20 years before retiring. I never met Tommy Tucker, but thanks to radio he became one of my childhood friends, and I was saddened to hear that he is gone.

In those simpler times there were only four radio stations in Atlanta and a few hundred more in the rest of the country. But they created and produced an impressive amount of diversified entertainment and information. Today more than 10,000 AM and FM

outlets blanket the nation with electronic signals. Most of them are content to air one type of contemporary music plus occasional news briefs and weather updates. Young people reared on this kind of radio may think it is not only nice to hear but the best that broadcasters can offer. Those who recall what radio was like before TV came along know differently.

If TV had preceded radio as a mass medium, the latecomer would doubtlessly have felt compelled to demonstrate its full range of creative capabilities in order to compete with television. Radio broadcasters, especially owners of AM stations, who are finding it difficult to attract enough audience and advertising to make a profit, ought to seriously consider reviving some of the numerous shows and services that radio initiated and can still do well. It might enable them to survive and perhaps even prosper.

Proof that it can be done was provided about four decades ago when the radio industry was faced with a similar situation during the early days of commercial television and emerged from the competitive struggle stronger and more popular than ever. Back in the early 1950s, as everyone rushed to buy a TV set, listeners, advertisers and broadcast personnel were deserting radio in droves. I was one of the defectors, engrossed in writing and producing shows on WSB-TV when the general manager, John Outler, asked me to return to the company's flagship radio station. "It's languishing," he said. "See if you can pump some life into it."

Removing the rust

After convincing a young but dubious group of radio employees that our task was not an impossible dream, we began to "remove the rust from radio." Not only did we succeed in getting people to talk about and listen to radio again, our campaign worked so well that Broadcast Music, Inc., invited me to tell about it at dozens of program clinics in the U.S., Canada and Puerto Rico. I also wrote a booklet, which BMI published and distributed, titled *Radio Rust Removers*.

Meanwhile, other innovative broadcasters were busy in various parts of the country, revitalizing their call letters with similar heartening results. Before long scores of "radioactive" stations were attracting larger audiences and grossing more money than they had ever done previously.

How did they do it? By localizing and personalizing their radio service, making it warm and friendly, stimulating, dependable, fun-to-have-around, and above all—useful. In short, radio found a need and filled it, transmitting its own distinctive kind of hometown news and gossip, sports, weather, traffic reports, games, quiz shows, documentaries, dramas, phone-talk, good music of many types, and even experimental programs.

Today's radio managers—especially those with sick AM operations—face a similar challenge and opportunity. Those who are willing to invest in fresh audio ideas that their video competitors have neither the time nor versatility to deal with—intelligent shows, features and services, tailored to the specific needs and wants of local listeners—can cash in on another exciting and profitable radio renaissance.

Unwired networks: affiliate lineup strong, sales slow but look to upturn

Major unwired TV networks are experiencing slow advertiser response upfront but say the affiliates lineup is strong and that they are looking to the scatter market and beyond with optimism. At both the NIB Inc., which concentrates on delivering kid audiences to buyers, and the C&C Unwired Network, executives admit that the going in sales has been rough so far.

At two other unwired networks, one, the Independent Television Network, has undergone a vast personnel shakeup, while Group W Broadcasting's Premier Network has a large number of clearances, according to a spokesman, but a call to determine its sales results was not returned.

Kerry Andrews, vice president, eastern sales at NIB, which sells Kidvid time on independents, says the company, based in Los Angeles, has experienced a slow start in sales. But he says he was somewhat stymied in pitching to advertisers and agencies because NIB received NTI data, including people meter numbers, which it uses for ratings guarantees, only a few weeks ago.

"It makes selling a little tougher, but we are in 122 markets, covering more than 90% of the country, including the TVX, Chris-Craft, Outlet and several of the Fox Broadcasting-owned stations. The support that has been thrown our way has been terrific. It took only six weeks for us to get such a heavy lineup of stations and markets. But nobody in their right mind would purchase time until we had official information, although we did talk to everyone to get their response.

"You name it, we have talked to Kellogg's, Burger King and Mattel, and everyone else. But we have no commitments, despite, a strong network upfront in kids, which went down in mid-May. But we didn't officially start until May 1, so we knew we wouldn't be a part of the upfront. The structure of our company is that we will be around for next year's upfront and beyond and expect to do scatter business

along the way."

At pioneer unwired web ITN, where station clearances have been "excellent"—160—several of the key personnel including Michael and Kevin Murphy, Steve Templeton and Jack Rafferty, are no longer with the company. At ITN, Michael Kammerer, president, could not be reached for comment, but Jack O'Hearn, in charge of station clearances, says that the departures were due to the reps starting a movie syndication company. However, an industry source says the exits were due to the tightening of the ITN ship.



Kerry Andrews

He continues, "A buying service or an unwired network work on different margins. ITN's margins are all over the board, from what I understand. Because of the competitive nature of the business now, Kammerer has to lower his margins, meaning his profit potential will be lower and, consequently, the money he pays his people will have to be less or some will have to leave."

Use of reps. In the case of the reps' involvement, NIB uses the reps for trafficking of orders and to help to police and monitor commercial schedules. Says Andrews, "We cut the deal with a station, which decides whether the rep should be involved or not. It means that if I close a deal in New York, I will send those orders to the Los Angeles office, where the orders will be compiled. Then they call or fax the respective reps in Los Angeles, who

then will place the orders on their stations. The rep is also responsible for making sure the schedules run correctly. We are involved also, but it's a good cross check."

Reps have been up in arms since the launching of the networks, and Petry Television went so far as to file a lawsuit against Premiere Network, claiming infringement on its exclusive rights to sell national advertising. But part of the suit, which entailed seeking a restraining order, was dismissed. Essentially, Petry failed to prove it would incur damages by the network, because the newcast-oriented network had not yet sold time.

At King World, Stephen Palley, COO, calls sales "tough" on the C&C Unwired Network, formed the past November by Camelot Entertainment Sales, barter subsidiary of King World, and Corinthian Communications. "We're selling it but it's a tougher sell than having specific product. People want their advertising to be in a specific environment. What you're selling is a rating and a demo and a clearance, as opposed to a *Wheel of Fortune*, an *Oprah Winfrey* or a *Jeopardy*, so it's a tougher upfront kind of sell."

Another factor. Also contributing to the hard sales times at the unwired networks is the notion that they are "not quite as legitimate as one would hope," says Palley. "I don't know about the others, but all the time will be bought, and the advertiser will get what he paid for. We wouldn't be involved with it otherwise. It's not our modus operandi to try to pick up a couple of dollars in an illegitimate fashion. But there is that stigma out there, no question about it, so our guys have to a lot of missionary work.

"They have to convince the agencies that this is King World Camelot and that we have always been very scrupulous about the buys we have made and they will get the same kind of service with this buy as they do in all the King World and Disney product they buy." Camelot sells national time for Disney's Buena Vista product.

"Camelot is doing a good job, but C&C doesn't have the same sellout as our other inventory does—where we had an extraordinary up-

front season. We expect the unwired network to be very successful in the scatter market. We had some success upfront, but not as much as with our other inventory."

Under its arrangement with Corinthian, one of the largest media buying services in the U.S., the C&C Network buys advertising time, initially during primetime and late fringe, on top independent and affiliated stations representing more than 80% of the U.S. and will sell the purchased time to national advertisers.

Corinthian is responsible principally for the purchase of the commercial time on the TV stations, and Camelot is principally responsible for selling the time to national advertisers.

Fries Family TV specials by Twain

Fries Family Theater's The Mark Twain Collection, series of six two-hour TV specials based on stories by the author, has been cleared in 103 markets representing 81% of the U.S., including all of the top 40 and 86 of the top 100.

The window for the films, which will air via barter, is the first Saturday through the third Sunday of each month, from October 1989 through March 1990. Top stations cleared include WCVB-TV Boston, WJLA-TV Washington, KRON-TV San Francisco, WPIX(TV) New York, KTTV(TV) Los Angeles and KXAS-TV Dallas.

The series is "virtually sold out," according to Ave Butensky, executive vice president, Fries Distribution. Blue-chip advertisers include AT&T, Pillsbury, Nestle and Parker Pen. The presentations will be supported by an extensive national educational outreach program for senior and junior high school students.

The Fries Family TV specials are, for October, *Mysterious Strangers*; November, *The Adventures of Huckleberry Finn*; December, *Life on the Mississippi*; January, *The Private History of a Campaign That Failed*; February, *Pudd'nhead Wilson*; and for the month of March will be *The Innocents Abroad*.

Jankowski plans

Gene Jankowski has left CBS to form Jankowski Communications System, which will not only acquire TV affiliates but also produce programming for the U.S. and international markets.

Jankowski, formerly chairman, CBS/Broadcast Group, has formed his new shop at the Museum of Broadcasting building, 1 East 53rd St., New York 10022.

The CBS veteran offered no spe-

cifics on programming projects beyond saying that they would be of quality and entertaining.

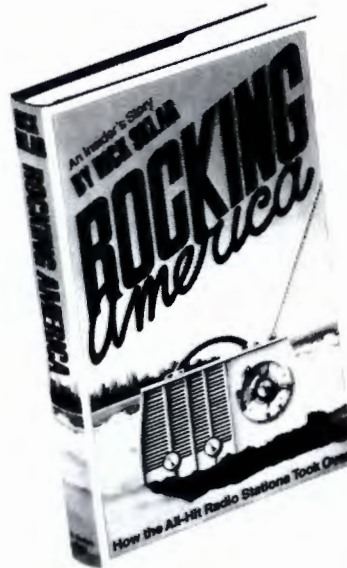
P&G backs CBS WW II movie

Procter & Gamble has bought full sponsorship of *Pied Piper*, a CBS TV movie due in 1989-90 prime-time.

The movie, a coproduction of Stan Margulies Productions and Granada Television.

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Rick Sklar is a radio and music video program consultant and was formally a consultant for ABC-TV's music video programs. He has been program director at New York radio stations WINS, WMGM, and at WABC, which he built into "the most listened-to station in the nation."

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Webs' afternoon specials 'grow up' in both audience, subject matter

Eda Godel Hallinan, director of ABC's *AfterSchool Specials*, told a TV Academy luncheon in New York recently that such daytime dramas for young people have "grown up" both in terms of the audience reached and the topics presented.

The onetime nursery school teacher said the shows now are targeted to 11-17-year-olds. As a result, some children's restrictions have been lifted, she added.

Among ABC's dramas shown last season were *Torn Between Two Fathers*, about custody rights, and *Daddy Can't Read*, about adult illiteracy. CBS' *Schoolbreak Specials*, meanwhile, focused on the debate over life-support systems for the elderly; on a drug rehabilitation center for addicted teenagers; and on a youngster who learns his grandfather was a Nazi concentration camp guard.

Both networks last season ran dramas about "date rape." As in other dayparts, however, controversial subject matter can prove hard to sell. When ABC aired *Date Rape*, some sponsors pulled out, Hallinan said. CBS' *No Means No*, however, just walked off with two prestigious daytime Emmy Awards, including one for writing. (Another ABC *AfterSchool Special*, *Taking a Stand*, also won an Emmy).

Serious subjects. A number of serious subjects will be treated in the new season. CBS, for one, plans *Frog Girl*, a true story about a teenage girl who was penalized by her California high school for refusing to dissect frogs in her biology class. ABC will dramatize mental illness, drinking and driving, business ethics, a teenager discovering her father is having an affair and another teen coping with a learning-disabled sibling. On the lighter side, Hallinan said, one drama will show a teenager's first access to the family car.

On the whole Hallinan conceded, the specials—which cost about \$450,000 an hour—do not make money, and often lose money. Moreover, to hold down affiliate

preemptions, ABC has agreed to avoid sweeps periods. So far, she added, these dramas have a "very limited" afterlife. HBO has bought some, she said, but the specials have yet to be offered in syndication. The programs' production budgets are close to that of a half-

Tartikoff's program plans for '90, beyond

Despite being the No. 1 network in the primetime ratings as the fall season nears, NBC is running scared when it comes to planning future series development.

"The main thrust of development is predicted on bad things happening," says Brandon Tartikoff, NBC Entertainment president. "You can't base your development on a lot of good things happening because then you'll always run the risk of being short of shows."



Brandon Tartikoff

Toward that end, NBC is even eyeing prospects for the leadoff positions on Thursday and Saturday, nights when the peacock network dominates the competition. "There is no guarantee [Bill] Cosby will agree to a seventh season," Tartikoff notes. A year ago NBC got the comedian to continue *The Cosby Show* for 1989-90 and also renegotiated to continue *Cheers* through the 1990-91 season. "I actually haven't sat down and talked about year seven with Bill," says Tartikoff. "I've had quiet conversations with his agent, Norman Brokaw."

Turning to Saturday, the NBC

hour primetime sitcom, and indeed a couple have run in primetime, she noted. CBS and ABC put a considerable amount of promotion behind these shows. Teaching guides are sent to the schools, and CBS has sent scripts to teachers in its ongoing "Read More About It" program. This fall, ABC plans to close-circuit its specials to schools so that their student newspaper critics can review them.

exec feels its leadoff sitcom hour should be closer to a 30 in Nielsen share. As for the shows occupying that span now, he says, "*227* and *Amen* are really more 9 o'clock shows that are playing at 8 o'clock. They've done a good job for us. But that's a development target for us, looking at [fall] 1990."

Shifting to the 10 p.m. slot, Tartikoff says that if *Yesterday, Today & Tomorrow* were to return as a Wednesday news magazine at midseason, *Midnight Caller* could be "moved up to 9 o'clock somewhere and anchor a night."

NBC, moreover, has tested sitcoms from 10 to 11 p.m., for example, against ABC's *War and Remembrance* last season while CBS has adopted an all-comedy strategy on Mondays this year and continuing into fall.

With that in mind, Tartikoff says, "We're looking at our own network and saying, 'One day, should Saturday night be all-comedy?'" *Hunter* presently airs Saturdays at 10. "Should it be six [half-hour] comedies? Or should it be four comedies followed by an hour comedy and go with that consistent theme night?"

Explaining his rationale, he adds, "If you look around the schedules, it's getting increasingly more difficult to find a place to play comedies where they don't run against other comedies."

In the coming season, NBC is targeting at least two of its two-part miniseries outside the sweeps periods. *Phantom of the Opera*, a Saban/Scherick Productions drama, will be a December project. *Gulliver's Travels*, a Henson Associates four-hour mini, is due "around next Easter time."

Zodiac to develop animation and teen shows with presales from overseas

Zodiac Entertainment is developing two programs for first-run syndication. One is an animation property for young children, and the other is a weekly live-action project geared toward teens. Plans for the animation program are to make it "grow" and to develop the marketing strategy along the same lines as *Denver, the Last Dinosaur*, according to Brian Lacey, partner and director of marketing development at Zodiac. By this, Lacey means beginning the program's life via a one-hour special introduction, moving it to a weekly first-run series and then continuing it as a strip. Station clearance pitches will begin in September, with a spring or fall 1990 broadcast, with anticipation for a strip launch in the 1991-92 season.

Specifics on the program were not revealed by Lacey, except that Zodiac has received "virtual agreement" with several major European broadcasters that will take the show. "We expect to come to the U.S. market with significant international presales from them, so when we sit down with broadcasters here, they will know it has already been supported financially

we don't have the muscle of some of the majors."

The program will be produced both in the U.S. and in Europe, and discussions are being held with a U.K.-based animation production company. A presentation tape is being worked on at this point, which will be shown to potential buyers. The tape will be shown at MIPCOM for foreign sale.

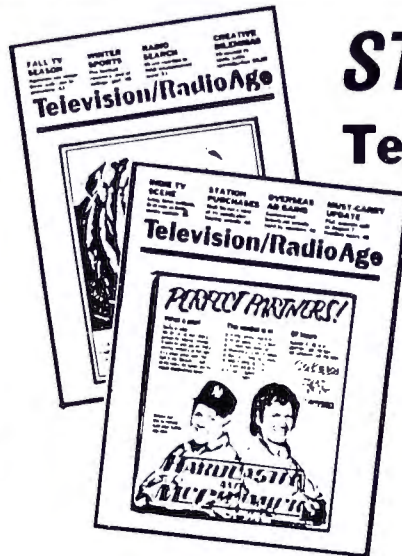
The live-action project will also utilize the financial participation of two or three major international broadcasters, including the Japanese. "It will be U.S.-designed, have a U.S. cast and U.S. scenery and technical direction, but the actual shooting will take place in the U.K." Each participant will use its own national cast, however, for its own version and will own the rights to the program. Lacey expects to make a presentation in mid-September for the U.S. and at MIP-



Brian Lacey

by their European colleagues, such as Italy, and France and by the U.K. This will enable us to hammer out a very reasonable deal with the U.S. broadcasters.

"We will not have to choke them with bit barter splits, because part of our deficit will have been covered by the international market. We have to do it that way because



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COM for overseas. If all goes well, the program will go on air in fall 1990.

Distribution lines have not yet been cleared, but Lacey says Zodiac expects to license stations in major markets first, and beyond that

KPLR-TV's 'security blanket' shows make station tie as top indie in July

Ted Koplars KPLR-TV St. Louis tied Fox Television's WTTG(TV) Washington as first-place independent in the top 50 markets, according to Nielsen's metered market report for July. The stations ran neck and neck to finish with DMA household shares of 16.

KPLR vice president, general manager Bob Fulstone explains the facts behind the figures. He concedes meters may have helped, adding, "Because they're more accurate than diaries, meters do do a better job of making most independent stations look as good as they really are."

In any event, Fulstone recalls that last November, Nielsen's last diary measurement of St. Louis, KPLR showed up "as only the third-ranked independent. In our first metered sweep in May, we came up No. 2. That left room for improvement, so we kept working until we hit No. 1 last month, along with WTTG."

He says one more thing meters helped KPLR prove "is that we don't need a lot of beatings and half-nude bedroom scenes to attract large and appreciative audiences who will keep coming back for more. The meters show we can do it with a balanced schedule of good, alternative programming—sports, news and entertainment—that you aren't afraid to let the kids watch."

Alternative, he explains, means giving viewers programming that makes them secure. "During prime-time on the affiliates, we show movies. Each night or week is geared to a theme so our viewers can know what to expect and won't be confused by a string of shows whose story lines have no logical relation or connection.

"Instead, our viewers know every Thursday night is Western movie night. We'll have a Hollywood week, featuring the major classics

plans are open. Zodiac, which was formed several months ago by Lacey and by Peter Keefe, as director, production, is funded by Central Independent Television, second largest commercial broadcaster in England.

with the Clark Gables, Myrna Loy and Fred Astaires. The next week could be Comedy Week. Our viewers can be comfortable with us because they have a good idea what to expect. We're a known quantity."

Locally owned. Fulstone also points out that KPLR is locally owned: "We're St. Louis' own station, featuring St. Louis' own hometown teams: St. Louis Blues hockey, Cardinals baseball, University of St. Louis basketball. When the affiliates run their entertainment, we run news, movies and sports. When they run their late news, we run *Night Court*."



Bob Fulstone

He adds, "We show *Family Ties* in early fringe. This fall we'll premiere *Who's the Boss?* in early fringe. We have *Sledge Hammer*, and just last month we added *Batman*. The timing was perfect, allowing us to capitalize on all the promotion of the new *Batman* movies that's been breaking box-office records at the movie houses. *Batman* is my idea of the best of 'kidult' programming: It's nostalgia and memories for the parents, but it's a brand-new series for kids who are seeing it for the first time."

He points out that Koplars is in the syndication production business, via animated series.

Syndication shorts

Harmony Gold will release and distribute worldwide *The Adventures on Rainbow Pond*, 39 half-hours available in January, according to Norman Siderow, vice president of acquisitions and development.

Remote Control, which debuts Sept. 11, has been cleared by **Viacom Enterprises** in more than 140 markets, including all six Tribune stations, covering 92% of the country. Time on the barter show is being sold by the MTV Networks.

Super Bowl Record Book, 30 half-minute Super Bowl vignettes for the 1989-90 football season, has been purchased by the five NBC-owned stations. Produced and distributed by **MG/Perin**, the series is available starting Sept. 10 through Super Bowl Day, Jan. 28, on an unlimited use basis.

Qintex Entertainment, Los Angeles, will offer 20 new episodes of *The New Leave It to Beaver* series this fall to the 60 stations clearing it. Also offered will be *It's a Small World*, the unaired original pilot for the sitcom, with only Barbara Billingsley and Jerry Mathers from the subsequent hit series.

MCA TV's new *Lassie* series this fall will include an episode in which June Lockhart and Jon Provost will be reunited. Those actors have not performed together since their days on the CBS Campbell Soup-sponsored series (1957-64). **Ralston Purina** is a major sponsor.

Worldvision Enterprises, New York, has cleared *After Hours* on over 100 stations, the latest including WTSP-TV Tampa, KCPQ-TV Seattle and WCAY-TV Nashville. Those stations represent 80% of the U.S. The stripped late night magazine series will offer music, comedy, satire and celebrity profiles.

Group W Productions, Los Angeles, has cleared more than 10 stations for *Desperate Passage*, a two-hour special depicting the 10-day sea voyage of seven hardcore juvenile prisoners, and how it changed them. Hosted by Michael Landon, the show will air on such stations as

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WWOR-TV New York, WGNX Atlanta, WJZ-TV Baltimore and KVVU-TV Las Vegas. Group W also will supply stations with public service announcements and other materials describing how stations can start community service efforts. In Los Angeles, the special ran on KTLA as part of a "Cry For Help Week," aimed at recruiting volunteers to work with troubled youth.

Turner Program Services, Atlanta, will barter-syndicate a colorized version of the 1938 film *A Christmas Carol*, with Lionel Barrymore. The movie will have a Nov. 20-Dec. 17 window.

Qintex Entertainment's *Roller-games* has been cleared by WFTX-TV Boston and KCPQ-TV Seattle, bringing the clearance level total to 142, representing 95% of the U.S. Other new markets are WRLH-TV Richmond, WIXT-TV Syracuse and KIMA-TV Yakima.

Republic Pictures Domestic Television's Holiday Features package has cleared four additional markets, KECI-TV Missoula, WGGT-TV Greensboro, KUED-TV Salt Lake City and KATU-TV Portland, Ore. The package includes *The Miracle of the Bells*, *Christmas Eve* and *The Bells of St. Mary's*.

Devillier-Donagan Enterprises has been selected by TV New Zealand International to represent it in the U.S. TVNZ International markets both for South Pacific Pictures and New Zealand Independent Programs. Some programming from TVNZ recently acquired in the U.S. includes *Sea Urchins* and *Under the Mountain*, sold to The Disney Channel and Warner/Amex, respectively.

Zooming in on People

Thomas Palmieri has joined **Saban Entertainment** as president. He comes to Saban from MTM Enterprises, where he was executive vice president and a member of the board of directors as well as a principal in the company. Prior to joining MTM in 1981, Palmieri held various executive positions in pro-

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gram analysis, planning and administration with the CBS Broad-



Thomas Palmieri

cast Group and the CBS Television Stations Division.

Joel Berman has been appointed vice president, off-network, features and cable sales for the domestic television division of **Paramount Pictures**. Previously, Berman was senior vice president, sales and marketing at GTG Marketing since October 1987.

Richard Sheingold has been named senior vice president, marketing and sales, **Group W Productions**. Sheingold comes to Group W after a long career in TV station



Richard Sheingold

sales and representation. Since 1984, he was vice president and general sales manager at TeleRep.

Steve Pearlman has been named director, television research at **Lorimar Television**. For the past two years, Pearlman was manager, network TV research at Lorimar Syndication, now Warner Bros. Domestic Television Distribution.

Luthan Hodge, Jr., a founder of **Eclipse Entertainment**, has been

named executive producer. Prior to his new position, Hodge was involved principally with the devel-

ESPN at bat in baseball practice; outlines plans for telecast schedule

While ESPN won't officially begin broadcasting major league baseball games until next season under a four-year, \$400 million deal, plans are already in swing to try to give viewers the best of America's favorite pastime.

Holding a "spring training" of its own, ESPN has begun scheduling the games as if its TV season had started, in simulated practice sessions. "Since we had never televised major league baseball games before, we decided to have a run-through to see how we could best cover the games," notes an ESPN spokesperson.

As spelled out by Loren Matthews, senior vice president, programming, ESPN will be airing games four nights per week, doubleheaders on Tuesday and Friday, and single games on Wednesday, primarily from Eastern and Central time zone. Sundays are "probably the sexiest part of the package," because they will see 24 consecutive weeks of exclusive games, each coming from a different ballpark.

As part of its arrangement with MLB, ESPN will be allowed to cut into its coverage of a specific game by presenting another game of national interest. "We will be there if there is a no-hitter in progress, yes, but I tend to think the no-hitter is a little overemphasized because you don't have a no-hitter until the latter innings. But we will be there to cut in on things of an unusual nature nationally."

Game selection. For the most part, the games will be picked seven days in advance, with the exception of some holidays and the Sunday night schedule, with both being selected before the season and locked in.

On Tuesdays and Fridays, the local baseball TV franchise games are protected in their home market, notes Matthews. "We will be in those markets with different games, so we will not be blacked out, but the local originating sta-

opment and marketing of *Travel & Adventure*, weekly first-run syndications series, to debut on Sept. 23.

tion will be able to air their games as their schedule calls for." When those markets with different games, so we will not be blacked out, but the local originating station will be able to air their games as their schedule calls for." When games are close regarding pennant races, pitching matchups will help determine which contest will get ESPN coverage, he notes.



Loren Matthews

Total exclusivity by ESPN is on Sundays, and there are varying degrees of exclusivity on Wednesdays, while Tuesdays and Fridays are non-exclusive.

ESPN will not only be providing "wall to wall" coverage of baseball, including not only the games themselves, but also *Baseball Tonight*, consisting of a half-hour of features, highlights and previews of the contests on a daily basis. Some spring training games and opening day contests will also get coverage. Jed Drake and Eric Schoenfeld will be coordinating producer and studio coordinating producer, respectively, of the MLB telecasts.

On the sales end, ESPN's Jack Bonanni, senior vice president, ad sales, says the company's efforts "are just coming out," with concentration initially on autos as official sponsors and retail through mid-August. "I'm encouraged from the reaction we have had so far by the auto industry."

TELEVISION/RADIO AGE

Station Report

August 21, 1989

HEART OF THE MATTER

WNYW-TV New York has teamed up with "The Daily News" in a year-long anticholesterol campaign. It involves the station's news, programming, promotion and sales departments. Sponsors range from medical services to olive oil./51

PARTING THE IRON CURTAIN

U.S. broadcasters in the Soviet Union: KMOX St. Louis with monthly dialogue, KOCO-TV Oklahoma City with football, WCVB-TV Boston and tennis and WNEW-FM New York broadcasting live from Lenin stadium./52

SELLER'S OPINION

Qualitative data plays an important role in helping stations zero in on the potential buyers of advertised product, says Lori Adelsberg, president, RadioResearch./53

SPOTLIGHT ON . . .

More rotation of Spanish and English commercials on predominantly English-language TV stations is seen occurring by Debbie Mason Garza, media director, Ferrer/Ad America, Los Angeles./55

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Darrel Cunningham
General Manager
KHBS-TV
Fort Smith, AR



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Pictured above (*left*) with news director, Craig Cannon, Darrel told us, “ Since we got our *SKYLINK* satellite news gathering vehicle, we talk to TV stations all over the country.”

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WNYW-TV, sponsors join 'News' to keep New Yorkers 'heart-healthy'

Half a million Americans die each year from heart attacks. In July *The Journal of the American Medical Association* reported still another study, this one out of the National Center for Health Statistics, indicating that over 60 million adults—more than a third of all adult Americans—are afflicted with health-threatening cholesterol levels.



NEW YORK

The good news, says *Time* magazine, quoting Dr. Bernadine Healy, president of the American Heart Association, is that over half of our adult population "has within its own power the ability to decrease its chance of getting heart disease."

Year long campaign. In New York, Fox Television's WNYW-TV has teamed up with *The Daily News* to spread that good news, complete with the details of how to do it, in a year-long anticholesterol campaign that involves the station's news, programming, promotion and sales departments.

Among the campaign's sponsors, WNYW Sales has brought in such health-related companies as Empire Blue Cross and Blue Shield of New York, *Longevity* magazine and Bertolli USA, Inc., producer and importers of Bertolli Classico olive oil, Bertolli Extra Virgin olive oil and Bertolli Extra Light olive oil.

WNYW director of sales development Tom Rocco recalls, "Bertolli was already using some television. We could see from the creative and its good health message, based on nutritional research, that their olive oil was a natural fit for the editorial environment of our own health-related anticholesterol project."

Says Rocco: "It's one thing for a company to just run spots in a high-rated newscast. And any advertiser gets good value for our *10 O'Clock News* and *Good Day New York*, no matter what news stories they're reporting. But when a company can run a good nutrition message following news reports about the importance of good nutrition, it can be a textbook case of value-added marketing. And our news reports are just one of several elements in our total health-related, anticholesterol campaign."

Added value. Rocco says he approached Bertolli's agency, Lowe Marschalk, where Marilyn Fisher,



Tom Rocco

senior vice president, director of broadcast services and media group head Rob Meeker recognized this added value, and where Amy Earl in the Bertolli account group agreed. He adds, "Even though Bertolli's participation in our anticholesterol campaign represented a lot of money for just one market, New York is the No. 1 market and Bertolli and Lowe Marschalk saw they were getting a program environment that includes the profes-

(Continued on page 52)

New York's WQXR opens new studios



Pointing with pride are, at l., WQXR operations director Loren Toolajian and program director Bob Sherman. They're seen here at the classical music station's outdoor Fifth Avenue sidewalk party in New York, celebrating WQXR move to new studios. Guests toured the station's new state-of-the-art facilities and enjoyed a concert by the popular Saturday Brass Quintet.

KMOX, WNEW-FM among U.S. broadcasters parting Iron Curtain

This is the year American broadcasters rack up another impressive string of firsts as they join and/or cover the peaceful U.S. music and sports invasion of the Soviet Union.

KMOX



In January CBS-owned KMOX St. Louis launched a monthly dialogue between American and Soviet citizens via Moscow Radio, enabling listeners in both countries to call in and talk with each other. Hearing one such conversation between a Russian food store employee and one of his members, a St. Louis supermarket checker, the president of the St. Louis local of the United Food and Commercial Workers Union called KMOX while the two were on the air and

invited Muscovite Olga Vignon to come to the U.S. to meet her St. Louis counterpart, Karan Kunz who works for Schnucks Markets. So Schnucks Markets, Union Local 655 and KMOX are cosponsoring the visit.

First time. Robert Hyland, senior vice president of CBS Radio and general manager of KMOX and sister station KLOU(FM), says that the January startup of the monthly people-to-people exchange "marked the first time a U.S. commercial radio station entered into a joint venture with the Soviets to enable each country's listeners to talk with each other and learn more about each other."

Sooner stampede. Meanwhile, hailing from Oklahoma City, sports anchor Dean Blevins and award-winning cameraman Gary Wolfe from KOCO-TV were in Russia on June 28 to cover the "Sooner Stampede"—the first football game played in the Soviet Union by high



Bob Hyland

school players assembled from all corners of Oklahoma.

A younger group from Boston—eight boys and girls 11 to 16 from Dorchester's Sportsmen's Tennis Club—left Boston on Aug. 9 for the Soviet Union for an historic two-week tournament tour. Covering their trip is a production crew from WCVB-TV headed by *CityLine* hostess-producer Karen Holmes. Holmes says WCVB will present a half hour special in September on

(Continued on page 53)

WNYW-TV and 'News' keep New Yorkers 'heart-healthy'

(from page 52)

sional medical advice of our 'resident physician,' Dr. Johanna Shaw as well as the integrity of our news anchors, John Roland and Cora-Ann Mihalik. And it was kicked off by our *Count Out Cholesterol* special on June 5, hosted by Joan Van Ark and Dr. Art Ulene."

At Lowe Marschalk, media group head Meeker says, "It works well for Bertolli because in spite of the growing public interest in fitness and nutrition, we can find a few health related programs on cable, but there's very little of it on relatively high rated over-the-air television in major markets. So when Channel 5 came to us with its long range anticholesterol project, it looked like an almost tailor-made fit for the client."

Health benefit. Meeker explains that WNYW's anticholesterol campaign "provides a program envi-

ronment that serves to underline the health benefit of olive oil. Health is mentioned briefly in Bertolli's creative, but for television, most of the creative is image: shots of the Italian country side, shots of harvesting the olives and pressing the oil, then cooking and serving the meal. The tag line is 'Eat well, live long, be happy.' The two words, 'Live long,' are the only direct reference to health in the spot, though Bertolli's print advertising, which allows for more copy than our 30-second TV execution, has the space to explain the health benefits in fuller detail. So WNYW's anticholesterol campaign gives us an opportunity to extend this to television."

Bertolli executives say the company sponsors an ongoing program of consumer education about olive oil's contribution to good health, maintains a registered dietician on staff and sponsors nutritional workshops for nutritional profes-

sionals attached to hospital staffs. Bertolli distributes recipe booklets at these workshops showing how to prepare tasty dishes that substitute olive oil for butter or other butter substitutes. These same recipe booklets are available to consumers via coupons in magazines and newspapers and are also offered in-store on the bottleneck collars on Bertolli Olive Oil bottles on grocery shelves.

The contribution of *The Daily News* is the expertise of restaurant critic Arthur Schwartz. Schwartz appears Wednesday mornings on WNYW's *Good Day New York* to rate the Big Apple's restaurants on how "heart-healthy" their cuisine is: whether "all-heart," "halfhearted," or "Heartbreaking." Those all heart restaurants and their chefs get a "Daily News-Fox 5 seal of approval" to display plus recommendations on *Good Day New York* and in Schwartz's restaurant column in *The News*.

(from page 52)

the goodwill tour of the young tennis players to Moscow, Kiev and Riga, Latvia. The program's sponsors will be Reebok International, Ltd., Bull HN Information Systems, Inc. and the trade journal *Computerworld*.



Ted Utz

Music got into this series of international acts when Westwood One and MTV: Music Television flew into Moscow for the four day Music and Peace Festival from Lenin Stadium hosted by Soviet rock group Gorky Park. Top bands from the West included Bon Jovi, Motley Crue, Skid Row and Scorpions.

The one radio station sending a delegation—its morning crew—was WNEW-FM New York. Station manager Ted Utz says WNEW's broadcast of its morning show live from Lenin Stadium on August 10 and 11 made it the "first major market U.S. rock 'n roll station to broadcast live from the Soviet Union."

Promotional partner. The global rockfest was organized to fight drug and alcohol abuse, and all ticket sales to the concert in Lenin Stadium and U.S. cable's SET (Showtime Event Television) pay-per-view proceeds from the U.S. are earmarked for the North Carolina-based Make a Difference Foundation and the USSR's All-Union Society of Sobriety.

Yet WNEW's "promotional partner—not commercial sponsor" for the event is Absolut Swedish Vodka. Says Utz: "You're right. There weren't any commercials for Absolut in our broadcasts. This is
(Continued on page 54)

One Seller's Opinion



Many ways to skin a sale by using qualitative data

Adelsberg

When it comes to advertising, there's much to be said for that old adage, "It's not the quantity, but the quality that counts." What's the use of reaching a large quantity of people with your sales message if those people are not likely to buy the advertised product? Zeroing in on potential buyers is essential, and qualitative research information can be tremendously useful in targeting these consumers.

Radio stations often make substantial investments in qualitative research information, only to let it sit on a shelf gathering dust. Or they use the data infrequently, only in "special" situations. That's unfortunate. Qualitative research information can greatly enhance a sales story.

With the qualitative data available today, a sales person has the opportunity to:

- **Promote radio as a medium:** We can show how users of a particular product are heavy radio listeners but light users of other media. If the target is an upscale audience, show how radio listeners are more affluent than those who use competing media.

- **Present the qualitative value of your station's audience:** For example, show why your station should be included on a buy targeting business flyers. Though you may rank only tenth in the client's target demo in the quantitative numbers, your station may reach your market's third largest target if what the advertiser really needs is frequent flyers.

But if your qualitative rank is not greatly improved over your quantitative rank when examining your audience, look at your station's composition. Perhaps a large *percentage* of your listeners are frequent business flyers, insuring that a message on your station will not be wasted on listeners unlikely to fly. An index showing the percentage of your listeners who are frequent flyers, compared to the percentage of the general population, can further illustrate the advertiser's likelihood of finding real prospects in your audience.

- **Counter format objections:** Qualitative data can often dispel format stereotypes that continue to exist among advertisers. A country station may reach more upscale, affluent executives than a classical music or all-news station. Though your station may not excel in the advertiser's target, say Mercedes-Benz owners, all is not lost. Demonstrate your listeners' ability to purchase a luxury car by showing your station's favorable delivery in such areas as high income, professional employment, advanced education, readership of upscale magazines, ownership of other top-of-the-line cars, etc. Point out that it may not be in the advertiser's best interest to simply seek out those who own a Mercedes, but to target consumers with the economic power to buy one, and who may need only the incentive of the advertiser's message to do so.

So the next time you are confronted with a one-liner such as "Your index is too low," be prepared to present your station's strength by using every possible sales angle you can uncover in your qualitative data. Whether working to get on the buy, or to boost your station's share of it, qualitative data, creatively used, can be a powerful asset in a multitude of sales situations.—**Lori Adelsberg**, president, *RadioResearch, Inc.*, Thornwood, N.Y.

Appointments

Stations



David M. Harris has been appointed vice president, general manager of Tak Communications' WJQY(FM) Fort Lauderdale. He had been group vice president/national sales for Marlin Broadcasting and before that vice president, general manager of Marlin's WTMI(FM) in Miami.

Lawrence F. Divney has been appointed senior vice president, advertising sales for Home Box Office's The Comedy Channel. He was

previously vice president of advertising sales for the Arts & Entertainment basic cable network and before that was the first vice president of sales for MTV: Music Television.



George C. Hyde, Jr. has been named executive vice president of the Radio Advertising Bureau. He moves to RAB from Miami where he has been regional vice president/general manager of Spanish-language WQBA AM-FM since 1982. He has been a director of the National Assn. of Broadcasters since 1985 and has been vice chairman, radio and a member of the NAB executive committee since 1988.

Robert P. Reich has been elected president of TK Communications. He joined the group owner last year and now moves up from executive vice president to succeed **John F. Tenaglia** who continues as chairman and chief executive officer.



Cathleen Pratt has been named director, corporate development, CBS Radio Networks. She joined CBS in 1986 as an account executive from Selcom Radio and in her new CBS post will concentrate on new business for the radio networks.

Chris Pike has been named vice president, general manager of WTKR-TV Norfolk-Newport News, recently acquired from Knight Ridder Broadcasting by Narragansett Television L. P. Pike had previously been sales manager for KOVR-TV Sacramento and for WUSA-TV Washington.

Don Davis has been promoted to vice president, general manager of WLTT(FM), the CBS owned station in Washington, D.C. The former vice president, programming, and operations for WWDC AM-FM Washington has been program director of WLTT since 1987.

Andy Lee, vice president and manager of WTVG(TV) Toledo, Ohio, has been named executive vice president and general manager. Before joining WTVG in 1987 Lee had been station manager of KVUE-TV in Austin, Texas.

Donald Tool has been tapped as general manager of KRLV(FM) Las Vegas, recently acquired by the WESCOM Group for \$4.1 million. Tool was formerly general manager of KRNT/KRNQ(FM) Des Moines.

KMOX, WNEW-FM part Iron Curtain

(from page 53)

like tobacco. No U.S. station can carry a commercial for Virginia Slims. But the Virginia Slims Tennis Tournament is all over television. In the same way Dave [Herman] and Marty [Martinez, WNEW(FM)'s morning team] said 'WNEW presents *The Absolut Rock It to Russia*,' every time they came on the air from Moscow."

Generating goodwill. Utz adds, "This was a four-day event, separate from the network broadcasts by Westwood One and The Source and MTV. But Absolut wasn't doing this to promote its products per se. Absolut did this to generate the same kind of goodwill, by sponsoring this major international anti-drug and anti-alcohol abuse benefit, that other distilled spirits companies or brewers look for when they run their 'Don't drink if you're going to drive' messages, or those New Year's Eve commercials warning party goers to 'Make sure your last one for the road is coffee.'"

Ernie Capria, director, marketing services for Carillon Importers Ltd., distributor of Absolut in the U.S., explains, "WNEW's audience is our market—25 to 35 and mostly male. This is our first international project with WNEW as their promotional partner for a major rock event. Depending on how the ratings for this one went, we may do more like it later."

WNEW account executive Ed Keane looks back and says, "This was an expensive proposition. We needed a promotional partner to underwrite the expense. But one remarkable aspect of the trip was that, to get visas for our morning team and their crew, we had to get the official invitation first. Gorky Park's invitation took so long working its way through the bureaucracy that we couldn't be sure until the last minute that everything would actually come off. But once we did get the green light and got everything cleared by our own legal department, TBWA [Carillon Importers' agency] and Ernie moved on it inside of a week."

Spotlight On...

Debbie Nason Garza



*Media director
Ferrer/Ad America, Inc.
Los Angeles*

Debbie Nason Garza, media director of Ferrer/Ad America, says the industry "has a long way to go in fine tuning our approach to the great many Hispanics who are bilingual in varying degrees in different markets and who spend a good deal of time watching and listening to both Spanish-language and English-language radio and television."

Garza figures, "Eventually, as more general market agencies grow more attuned to the varying degrees of assimilation, I think we'll see more rotation of Spanish and English commercials on predominantly English-

language television stations, particularly in markets like San Antonio, generally considered to be among those with high assimilation levels. Such commercial rotation is already done by some agencies with spots created specifically to sell to blacks.

"On the other hand, in testing products being introduced to the Hispanic market for the first time, I've seen big jumps in shelf movement take place following airing of the first Spanish-language spots, even in San Antonio."

This, she says, "tells me that another factor we should consider is the basic goal of effective creative, whatever language it's in. That is, to find and push those emotional hot buttons that stimulate brand trial. Focus group response tells us that even among Hispanics who speak and understand English quite well, it's the message in Spanish that's most likely to hit the right buttons. And I've seen survey findings from other sources that back up our own focus group feedback."

Garza adds, "There's more to it than language per se. For instance, much of our advertising directed to Hispanics revolves around lifestyle factors like closer family ties that follow Hispanic families on into their third and fourth generations, even in those cases where the grandchildren are more comfortable with English than Spanish.

"For all we know at this stage of what research is available, elements like this may have as much impact as the language factor alone in pushing many Hispanics' buy-buttons."

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KAER and KFBK (AM), Sacramento KPWB, Los Angeles KJQY, San Diego

Westinghouse Broadcasting Company

Representatives



Dave Bell had been elected a vice president at Petry Television. The former Blair TV sales rep joined Petry in 1980 as an account executive and is currently manager of Petry's Philadelphia sales office.



Will Schutte has transferred to Durpetti & Associates in Los Angeles as regional manager. He had been regional manager of the San Francisco sales office of McGavren Guild Radio.

Janet Emmelman-Zablah has been named to head the new San Francisco sales office opened by Cabalero Spanish Media. She was formerly with Petry Television and before that worked for Avery Knodel Television.

Mary Jane Mayes and **Mark Goldstein** have been elected vice presidents at Blair Television in New York. Both came to Blair in 1980 as account executives. Goldstein is currently sales manager of the NBC Green Team, and Hayes heads Blair TV's NBC Red Team in New York.

Michael Rix has been promoted to national sales manager of Seltel's Rockets Sales Team. He came to Seltel last year to head the Rockets in New York and before that had been North East sales manager for producer-syndicator Harmony Gold.



Jeanne Hoberman has joined HNWH as sales manager of the rep's Boston office. She moves in from Konjolka & Co., where she was vice president, account services for the broadcast marketing and media service.

Susan Cugliari is now an account executive with Banner Radio in Detroit. She had been an account executive for Comerica Advertising, also Detroit.

T. C. Schultz has returned to Katz American Television as vice president, New York team manager for the Eagles sales unit. He first joined Katz American in 1979 as a sales executive, was elected a divisional vice president in 1986 and named national sales manager for the Stars team in 1988.

Agencies

Jack I. Shubert will join Earle Palmer Brown on Sept. 5 as senior vice president/corporate director of media. He is currently corporate director of advertising and research services for Ralston Purina Co. in St. Louis.

Bonnie Lamb has been named media director of Montgomery & Associates, King of Prussia, Pa. The former media director of Coriell and Co. has most recently been regional advertising manager for Silo, Inc.

Suzanne Ziv has been elected a vice president at Lintas: New York. She joined the agency in 1983 as an assistant planner and is currently a media supervisor on the agency's Planters, LEGO, Snuggle, Impulse and Howard Johnson's accounts.

Brian R. Krueger has joined Advertising, Boelter & Lincoln in Milwaukee as a buyer/planner. He moves in from a buying post with Hoffman-York, also Milwaukee.

WLIB live from the Apollo



Black talk-formatted WLIB New York now airs The Morning Show with Mark Riley with talk and live music and live commercials before a studio audience at Harlem's Apollo Theater. Here host Riley, r., is seen interviewing Manhattan Borough President and Democratic mayoral candidate David Dinkins.

Wall Street Report

News Corp. rates high at CL Global Partners, but there's caution on debt

"News Corp. is an outstanding example of how one man's overwhelming entrepreneurial drive has meshed with rapid evolution in an industry to produce the world's first global media giant."

Those are the words of Jessica Reif, vice president of CL Global Partners Securities Corp., who holds little back in her enthusiasm for the company that Rupert Murdoch built. And, while she observes, "The advantages to the company are those that accrue to being the first with a big concept," she also mentions the minuses: "The company is too dependent on one person's vision. It has also amassed a lot of debt, the result of the man with the vision being in a hurry."

With per share earnings, in U.S. dollars, for the 1988 fiscal year ended June 30, 1988 at \$2.17, CL has projected a decline to \$1.97 in '89 and \$1.87 in '90. After extraordinary items, the equivalents are \$2.20, \$1.39 and \$1.87.

Reif says News Corp. is inexpensive in terms of earnings at 13 times the current year's earnings per share, and also in terms of cash flow, at 3.4 times operating cash flow and 8.6 times net cash flow. She points to its stable of valuable properties around the world including the 20th Century Fox library of over 1,500 titles, *TV Guide*, *Daily Racing Form*—a monopoly paper with over 40% operating margin—and dominant newspapers in Australia and the U.K.

The outcome of heavy TV investments in the U.S. and U.K. will have major impact on earnings growth and stock performance over the next several years, says Reif. She speculates that the U.S. investment of over \$2 billion is going very well but that it is premature to judge the U.K., where Sky Channel's total investment will exceed \$830 million (U.S.).

The U.S. TV group—Fox Broadcasting and the owned TV stations—will be the fastest growing division, she notes, growing from a negative operating contribution of \$15 million in fiscal '88 to an estimated minimum \$200 million contribution in fiscal '91, or 28% of estimated U.S. operating income.

She estimates the 1990 operating income breakdown will be: newspapers, 63%; magazines, 23%; U.S. television, 13%; U.K. television, -24%; Twentieth Century Fox filmed entertainment, 13%; and free-standing inserts and other business, 12%.

Fox Broadcasting

Reif points out that Fox Broadcasting has nearly tripled its upfront advertising revenue from \$115 million last year to over \$300 million this year for the following reasons:

- It will increase programming and, therefore, advertising inventory, by 45%.
- Ratings have increased 50% for the two nights it

was on in the 1988-89 season.

■ It will sell 3-5% more viewers per household in its target demographics.

"On the television station level," Reif comments, "we project nearly 9% advertising revenue growth. The strength in the upcoming year will be derived from local advertising (approximately 55% of its stations' advertising revenue), with an estimated 10% increase. National spot (45% of Fox Television stations' advertising revenue) should increase by 7%."

Pointing to a dramatic turnaround for Fox's seven TV stations in 1989, after a disappointing prior year, CL is projecting a 35% increase in cash flow and operating income in fiscal '89, and for fiscal '90, nearly a 30% increase. For '89, it estimates a 16% revenue increase to \$440 million, with operating income estimated to climb 35% to nearly \$110 million. Reif notes this is one of the few TV station groups, if not the only one, whose program costs currently are decreasing.

The theatrical division is expected to break even in operating income on revenues of some \$500 million for fiscal '89. Reif observes that the deficit for network production in any given year is at the \$10 million level, but this may be closer to \$15 million in fiscal '90 because of the greater number of shows in the coming season. The seven network shows are: ABC's *Anything But Love*, *Doogie Howser, MD.* and *Mr. Bevedere*, NBC's *L.A. Law* and *Sister Kate* and Fox's *The Tracy Ullman Show* and *Alien Nation*.

Telemundo recommended

Telemundo Group, which went public with an initial offering of 2 million shares in August 1987 at \$10.50 per share, is being recommended by CL Global Partners despite estimated losses for the next three years. The stock has been trading around \$5 per share, and Reliance Capital Group and its affiliates control 70% of the shares outstanding. With a 1988 per share loss of \$2.33, CL projects losses of \$2.57 in '89 and \$2.52 in '90.

CL vice president Jessica Reif recommends the stock for the following reasons:

■ "We project Telemundo will be net cash-flow positive by next year. Broadcast cash flow is anticipated to increase rapidly in each successive year for the foreseeable future.

■ "We believe there is a large untapped advertising market for the Hispanic audience that Telemundo can and will exploit.

■ "The combination of (a) more advertisers coming into the market as well as increased expenditures by current advertisers, (b) more viewers being reached as Telemundo increases its coverage of U.S. Hispanic households and (c) higher rates per spot as new and more credible research methods provide proof that the audience is there, will cause more spots to be sold at higher rates. This will yield dramatically higher revenues for Telemundo for each of the next several years.

■ "The risk of negative cash flow in the current year should not be overemphasized as Reliance Group, with more than \$100 million already invested, is a likely source of additional funds. The potential for some dilution to shareholders is offset by the stability to ongoing operations that Reliance provides."

TV station shares (from page 40)

Mon-Sun, Sign-on/sign-off Households M '89 F '89 N '88 M '88 M-F 4-7:30 p.m. W M 25-54 25-54 M-F 11-11:30 p.m. W M 25-54 25-54

Seattle-Tacoma (15)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| KING-TV/N | 21 | 20 | 23 | 20 | 21 | 17 | 29 | 31 |
| KOMO-TV/A | 21 | 22 | 23 | 22 | 21 | 17 | 24 | 19 |
| KIRO-TV/C | 19 | 20 | 18 | 19 | 26 | 22 | 24 | 25 |
| KSTW-TV/I | 9 | 11 | 9 | 11 | 11 | 17 | 6 | 13 |
| KCPO-TV/I/F | 7 | 6 | 7 | 7 | 5 | 6 | 6 | 6 |

Pittsburgh (16)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| KDKA-TV/C | 27 | 29 | 26 | 28 | 33 | 25 | 29 | 23 |
| WTAE-TV/A | 19 | 19 | 20 | 19 | 19 | 25 | 29 | 32 |
| WPXI/N | 19 | 18 | 20 | 20 | 19 | 20 | 17 | 16 |
| WPGH-TV/I/F | 6 | 6 | 6 | 8 | 4 | 5 | 3 | 3 |
| WPTT-TV/I | 3 | 2 | 3 | 3 | 4 | 5 | 6 | 3 |

Tampa-St. Petersburg (17)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WFLA-TV/N | 25 | 27 | 24 | 24 | 22 | 20 | 28 | 22 |
| WTVT/C | 23 | 24 | 24 | 23 | 26 | 20 | 24 | 17 |
| WTSP-TV/A | 18 | 17 | 20 | 19 | 19 | 15 | 20 | 17 |
| WTOG/I | 6 | 6 | 6 | 5 | 7 | 15 | 4 | 9 |
| WFTS/I/F | 5 | 5 | 5 | 5 | 4 | 5 | 4 | 4 |

St. Louis (18)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| KSDK/N | 30 | 31 | 30 | 32 | 36 | 31 | 39 | 37 |
| KMOV/C | 23 | 24 | 24 | 23 | 27 | 23 | 28 | 24 |
| KTVI/A | 14 | 15 | 15 | 13 | 14 | 15 | 9 | 7 |
| KPLR-TV/I | 14 | 11 | 12 | 11 | 9 | 8 | 13 | 20 |
| KDNL-TV/I/F | 5 | 5 | 6 | 6 | 5 | — | 2 | 2 |

Denver (19)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| KUSA-TV/A | 21 | 20 | 21 | 19 | 28 | 27 | 31 | 28 |
| KCNC-TV/N | 19 | 19 | 24 | 21 | 17 | 18 | 26 | 25 |
| KMGH-TV/C | 15 | 15 | 15 | 16 | 11 | 9 | 11 | 8 |
| KWGN-TV/I | 11 | 12 | 11 | 12 | 11 | 9 | 3 | 6 |
| KDVR-TV/I/F | 7 | 7 | 7 | 8 | 6 | 9 | 9 | 11 |
| KTVD/I | 4 | 3 | — | — | 6 | 9 | 3 | 3 |

Phoenix (20)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| KTSP-TV/C | 23 | 23 | 23 | 22 | 20 | 27 | 26 | 21 |
| KTVP/A | 19 | 19 | 22 | 19 | 25 | 20 | 21 | 21 |
| KPNX-TV/N | 19 | 19 | 19 | 19 | 15 | 13 | 21 | 24 |
| KPHO-TV/I | 10 | 10 | 10 | 11 | 15 | 13 | 5 | 6 |
| KNXV-TV/I/F | 6 | 7 | 7 | 6 | 5 | 7 | 5 | 3 |
| KUTP/I | 5 | 3 | 3 | 4 | — | — | 5 | 6 |

Sacramento-Stockton (21)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| KCRA-TV/N | 26 | 26 | 27 | 26 | 30 | 25 | 41 | 35 |
| KOVR-A | 17 | 18 | 18 | 18 | 13 | 10 | 18 | 18 |
| KXTV/C | 17 | 17 | 17 | 16 | 13 | 10 | 12 | 12 |
| KTXL-I/F | 7 | 8 | 8 | 8 | 9 | 10 | 6 | 6 |
| KRFB-TV/I | 5 | 5 | 5 | 6 | 4 | 5 | — | — |
| KSCH-I | 3 | 4 | 3 | 3 | 4 | 5 | — | — |

Baltimore (22)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WIZ-TV/A | 25 | 24 | 24 | 23 | 38 | 32 | 34 | 31 |
| WMAR-TV/N | 23 | 24 | 24 | 24 | 21 | 21 | 19 | 21 |
| WBAL-TV/C | 21 | 21 | 21 | 22 | 17 | 16 | 22 | 17 |
| WBFF-I/F | 7 | 7 | 6 | 6 | 8 | 5 | 13 | 10 |
| WNLV-TV/I | 4 | 3 | 4 | 4 | 4 | 5 | 3 | — |

Hartford-New Haven (23)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WFSB-TV/C | 23 | 23 | 22 | 23 | 33 | 25 | 32 | 27 |
| WTHN-TV/A | 21 | 21 | 21 | 22 | 24 | 25 | 23 | 23 |
| WVIT-N | 12 | 12 | 12 | 11 | 10 | 13 | 9 | 9 |
| WTHI-TV/I/F | 5 | 5 | 4 | 5 | 5 | 6 | 9 | 9 |
| WTXX-TV | 4 | 4 | 4 | 4 | 5 | 6 | — | 5 |

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Mon-Sun, Sign-on/sign-off Households M '89 F '89 N '88 M '88 M-F 4-7:30 p.m. W M 25-54 25-54 M-F 11-11:30 p.m. W M 25-54 25-54

San Diego (24)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| KFMB-TV/C | 22 | 23 | 21 | 21 | 23 | 25 | 18 | 24 |
| KGTV/A | 21 | 20 | 23 | 21 | 27 | 20 | 29 | 29 |
| KNSD/N | 15 | 16 | 17 | 16 | 9 | 5 | 18 | 12 |
| XETV/I/F | 8 | 7 | 8 | 9 | 9 | 10 | 12 | 6 |
| KUSI-TV/I | 6 | 4 | 4 | 4 | 5 | 10 | 6 | 6 |
| KTTY/I | 2 | — | — | 2 | — | — | — | — |

Orlando-Daytona Beach-Melbourne (25)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WFTV/A | 25 | 26 | 26 | 24 | 29 | 25 | 30 | 29 |
| WESH/N | 22 | 23 | 23 | 24 | 21 | 20 | 22 | 19 |
| WCPX-TV/C | 18 | 20 | 19 | 21 | 17 | 20 | 17 | 14 |
| WOFL-I/F | 9 | 9 | 9 | 9 | 8 | 10 | 4 | 10 |

Indianapolis (26)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WISH-TV/C | 23 | 23 | 22 | 21 | 19 | 17 | 28 | 20 |
| WRTV/A | 22 | 23 | 22 | 20 | 31 | 22 | 20 | 20 |
| WTHR/N | 18 | 17 | 20 | 20 | 19 | 17 | 28 | 25 |
| WXIN/I/F | 7 | 7 | 7 | 8 | 8 | 11 | 4 | 10 |
| WTTV/I | 6 | 8 | 7 | 7 | 8 | 6 | — | — |

Portland, Ore. (27)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| KOIN-TV/C | 23 | 21 | 21 | 24 | 22 | 20 | 20 | 19 |
| KGW-TV/N | 20 | 22 | 22 | 20 | 17 | 15 | 27 | 25 |
| KATU/A | 20 | 20 | 21 | 18 | 26 | 25 | 20 | 19 |
| KPTV/I | 13 | 12 | 13 | 13 | 17 | 15 | 20 | 13 |
| KPDx-TV/I/F | 4 | 4 | 4 | 4 | 4 | — | — | — |

Milwaukee (28)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WTMJ-TV/N | 25 | 25 | 24 | 26 | 38 | 33 | 32 | 27 |
| WISN-TV/A | 19 | 18 | 19 | 19 | 25 | 25 | 26 | 27 |
| WITI-TV/C | 19 | 19 | 19 | 20 | 19 | 17 | 18 | 16 |
| WCGV-I/F | 8 | 7 | 7 | 7 | 6 | — | 8 | 8 |
| WVTV/I | 7 | 8 | 8 | 10 | 6 | 8 | 3 | 3 |

Cincinnati (29)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WLWT/N | 23 | 22 | 25 | 23 | 21 | 25 | 35 | 36 |
| WCPO-TV/C | 23 | 24 | 22 | 24 | 25 | 19 | 19 | 14 |
| WKRC-TV/A | 19 | 18 | 20 | 20 | 21 | 19 | 23 | 18 |
| WXIX-TV/I/F | 11 | 11 | 10 | 9 | 13 | 13 | 6 | 7 |
| WIII/I | 2 | 2 | 2 | 2 | 4 | 6 | 3 | — |

Kansas City (30)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| KCTV/C | 24 | 24 | 23 | 22 | 24 | 25 | 28 | 23 |
| WDAF-TV/N | 23 | 23 | 24 | 24 | 18 | 17 | 28 | 28 |
| KMBC-TV/A | 22 | 22 | 23 | 24 | 35 | 25 | 33 | 28 |
| KSHB-TV/I/F | 9 | 9 | 8 | 9 | 6 | 8 | 3 | 5 |
| KZKC/I | 4 | 3 | 4 | 4 | — | — | 3 | 3 |

Charlotte (31)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WBTV/C | 29 | 29 | 29 | 28 | 23 | 25 | 27 | 29 |
| WSOC-TV/A | 26 | 26 | 25 | 27 | 42 | 35 | 35 | 38 |
| WPCQ-TV/N | 9 | 8 | 8 | 9 | 4 | 5 | 4 | 4 |
| WJZY/I | 6 | 6 | 7 | 5 | 8 | 5 | 12 | 8 |
| WCCB-I/F | 6 | 6 | 6 | 7 | 4 | 5 | 4 | 4 |

Nashville (32)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WSMV/N | 30 | 30 | 31 | 31 | 41 | 29 | 31 | 29 |
| WTVF/C | 24 | 25 | 23 | 25 | 18 | 21 | 28 | 26 |
| WKRN-TV/A | 18 | 17 | 18 | 18 | 18 | 29 | 18 | 16 |
| WZTV/I | 5 | 5 | 6 | 6 | 5 | 7 | 8 | 8 |
| WCAY-I/F | 4 | 3 | 4 | 3 | 5 | — | 3 | 3 |

Columbus, O. (33)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WCMH-TV/N | 27 | 26 | 27 | 26 | 22 | 17 | 37 | 38 |
| WBNS-TV/C | 24 | 24 | 23 | 25 | 22 | 22 | 22 | 17 |
| WSYX/A | 20 | 21 | 23 | 19 | 30 | 28 | 22 | 25 |
| WTTE-I/F | 6 | 6 | 6 | 7 | 4 | 6 | 7 | 4 |

Mon-Sun, Sign-on/sign-off Households M '89 F '89 N '88 M '88
 M-F 4-7:30 p.m. W M 25-54 25-54
 M-F 11-11:30 p.m. W M 25-54 25-54

Raleigh-Durham (34)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WTVD/A | 29 | 27 | 28 | 30 | 42 | 38 | 39 | 38 |
| WRAL-TV/C | 26 | 30 | 27 | 28 | 23 | 24 | 26 | 24 |
| WPTF-TV/N | 8 | 8 | 8 | 9 | 4 | 5 | 4 | 5 |
| WLFL-TV/I/F | 6 | 6 | 6 | 5 | 8 | 5 | 9 | 10 |
| WKFT/I | 2 | 2 | 2 | 2 | — | — | — | — |

New Orleans (35)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WWL-TV/C | 35 | 36 | 36 | 36 | 42 | 37 | 38 | 34 |
| WDSU-TV/N | 19 | 19 | 21 | 20 | 15 | 16 | 13 | 15 |
| WVUE/A | 15 | 14 | 16 | 15 | 15 | 21 | 21 | 17 |
| WGNO/I | 7 | 7 | 7 | 9 | 8 | 5 | 4 | 2 |
| WNOL-TV/I/F | 6 | 6 | 5 | 6 | 4 | 5 | 13 | 12 |

Greenville-Spartanburg-Asheville (36)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WYFF-TV/N | 28 | 28 | 29 | 30 | 35 | 30 | 38 | 33 |
| WSPA-TV/C | 25 | 24 | 23 | 22 | 23 | 25 | 29 | 29 |
| WLOS/A | 19 | 19 | 19 | 20 | 19 | 20 | 17 | 19 |
| WHNS-TV/I/F | 8 | 9 | 9 | 8 | 8 | 5 | 4 | 5 |

Grand Rapids-Kalamazoo-Battle Creek (37)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WOTV/N | 23 | 23 | 24 | 23 | 26 | 27 | 36 | 36 |
| WZZM-TV/A | 19 | 18 | 17 | 17 | 26 | 27 | 23 | 18 |
| WWMT/C | 19 | 19 | 20 | 21 | 21 | 13 | 9 | 9 |
| WXMI/I/F | 8 | 9 | 8 | 8 | 5 | 7 | 5 | 9 |
| WUHQ-TV/A | 5 | 6 | 5 | 6 | 5 | — | 5 | 5 |

Buffalo (38)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WKBW-TV/A | 24 | 25 | 25 | 26 | 32 | 32 | 31 | 27 |
| WIVB-TV/C | 21 | 22 | 19 | 21 | 20 | 21 | 31 | 30 |
| WGRZ-TV/N | 21 | 20 | 23 | 22 | 12 | 21 | 19 | 23 |
| WNYB-TV/I | 4 | 4 | 4 | 4 | 4 | 5 | 3 | 3 |
| WUTV/I/F | 4 | 3 | 3 | 4 | 4 | 5 | — | — |

Oklahoma City (39)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| KWTV/C | 25 | 26 | 26 | 25 | 32 | 27 | 26 | 23 |
| KTVY/N | 23 | 24 | 23 | 25 | 23 | 20 | 33 | 32 |
| KOCO-TV/A | 18 | 17 | 19 | 17 | 14 | 13 | 26 | 20 |
| KOKH-TV/I | 6 | 6 | 5 | 6 | 5 | 7 | 2 | 5 |
| KGMC/I | 4 | 5 | 4 | 5 | 5 | 7 | 2 | 2 |
| KAUT/I/F | 4 | 3 | 4 | 4 | 5 | — | 2 | 2 |

Salt Lake City (40)

| | | | | | | | | |
|----------|----|----|----|----|----|----|----|----|
| KUTV/N | 23 | 23 | 23 | 25 | 27 | 22 | 33 | 29 |
| KBL-TV/C | 21 | 20 | 21 | 23 | 27 | 22 | 30 | 29 |
| KTVX/A | 21 | 22 | 23 | 21 | 20 | 22 | 18 | 16 |
| KSTU/I/F | 8 | 12 | 10 | 11 | 7 | 11 | 5 | 8 |
| KXIV/I | 3 | — | — | — | — | — | 3 | 3 |

Memphis (41)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WMC-TV/N | 29 | 30 | 31 | 30 | 32 | 33 | 26 | 27 |
| WREG-TV/C | 24 | 25 | 24 | 22 | 28 | 22 | 33 | 27 |
| WHBO-TV/A | 14 | 13 | 15 | 16 | 12 | 11 | 19 | 20 |
| WPTY-TV/I | 6 | 5 | 6 | 6 | 4 | 6 | 2 | 5 |
| WMKW/I/F | 4 | 6 | 4 | 4 | 4 | 6 | 2 | 2 |

Norfolk-Portsmouth-Newport News-Hampton (42)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WTKR-TV/C | 25 | 25 | 23 | 25 | 25 | 24 | 23 | 18 |
| WVEC-TV/A | 21 | 21 | 23 | 20 | 29 | 24 | 19 | 18 |
| WAVY-TV/N | 19 | 20 | 22 | 23 | 18 | 24 | 31 | 27 |
| WTVZ/I/F | 6 | 6 | 5 | 6 | 4 | 5 | 12 | 14 |
| WYAH/I | 4 | 5 | 5 | 5 | 4 | 5 | — | 5 |

Mon-Sun, Sign-on/sign-off Households M '89 F '89 N '88 M '88
 M-F 4-7:30 p.m. W M 25-54 25-54
 M-F 11-11:30 p.m. W M 25-54 25-54

San Antonio (43)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| KENS-TV/C | 23 | 26 | 24 | 23 | 29 | 29 | 42 | 39 |
| KMOL-TV/N | 20 | 21 | 22 | 21 | 14 | 14 | 15 | 15 |
| KSAT-TV/A | 18 | 17 | 21 | 20 | 19 | 21 | 27 | 24 |
| KWEX-TV/I | 6 | 5 | 4 | 7 | 10 | 7 | 4 | 4 |
| KRRT/I/F | 6 | 6 | 6 | 8 | 5 | 7 | 2 | 2 |
| KABB/I | 5 | 4 | 4 | 4 | 5 | 7 | 2 | 2 |

Providence-New Bedford (44)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WJAR/N | 26 | 26 | 26 | 26 | 22 | 26 | 32 | 35 |
| WPRI-TV/A | 19 | 20 | 21 | 19 | 26 | 26 | 16 | 13 |
| WLNE/C | 15 | 14 | 13 | 14 | 13 | 16 | 16 | 13 |
| WNAC-TV/I/F | 3 | 3 | 3 | 3 | — | 5 | — | — |

Harrisburg-York-Lancaster-Lebanon (45)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WGAL-TV/N | 30 | 29 | 27 | 29 | 30 | 27 | 41 | 31 |
| WHTM/A | 14 | 17 | 15 | 14 | 25 | 20 | 24 | 19 |
| WHP-TV/C | 12 | 13 | 13 | 12 | 10 | 7 | 12 | 6 |
| WPMT/I/F | 4 | 6 | 5 | 5 | 5 | 7 | — | — |
| WLYH-TV/C | 3 | 4 | 4 | 4 | — | — | — | — |

Louisville (46)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WHAS-TV/C | 28 | 27 | 25 | 28 | 38 | 41 | 39 | 32 |
| WAVE/N | 25 | 25 | 28 | 27 | 17 | 18 | 27 | 29 |
| WLKY-TV/A | 16 | 17 | 16 | 16 | 21 | 18 | 21 | 18 |
| WDRB-TV/I/F | 7 | 8 | 9 | 8 | 8 | 6 | 3 | 4 |

Birmingham (47)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WBRC-TV/A | 27 | 26 | 26 | 25 | 35 | 27 | 29 | 24 |
| WVTM/N | 26 | 27 | 26 | 31 | 26 | 33 | 39 | 44 |
| WTTQ/I | 10 | 11 | 12 | 11 | 13 | 7 | 11 | 6 |
| WBMG/C | 10 | 10 | 11 | 9 | 4 | 7 | 3 | 6 |

Greensboro-Winston Salem-High Point (48)

| | | | | | | | | |
|-----------|----|----|----|----|----|----|----|----|
| WFMY-TV/C | 29 | 32 | 28 | 30 | 31 | 33 | 27 | 30 |
| WGHP-TV/A | 21 | 21 | 23 | 21 | 27 | 19 | 18 | 20 |
| WXII/N | 20 | 20 | 21 | 22 | 19 | 19 | 27 | 25 |
| WNRW/I/F | 6 | 5 | 5 | 6 | 8 | 10 | 9 | 5 |
| WGTT/I | 2 | 3 | 3 | 2 | — | — | — | — |

Dayton (49)

| | | | | | | | | |
|-------------|----|----|----|----|----|----|----|----|
| WHIO-TV/C | 26 | 28 | 26 | 27 | 26 | 25 | 35 | 35 |
| WDTN/A | 22 | 20 | 20 | 20 | 30 | 25 | 23 | 22 |
| WKEF/N | 15 | 14 | 18 | 15 | 9 | 6 | 12 | 13 |
| WRGT-TV/I/F | 7 | 7 | 6 | 6 | 9 | 13 | 8 | 4 |

West Palm Beach-Ft. Pierce-Vero Beach (50)

| | | | | | | | | |
|----------|----|----|----|----|----|----|----|----|
| WPTV/N | 25 | 26 | 25 | 24 | 35 | 32 | 36 | 26 |
| WPEC/C | 18 | 18 | 15 | 15 | 19 | 16 | 14 | 15 |
| WFLX/I/F | 7 | 6 | 6 | 7 | 12 | 11 | 5 | 7 |
| WPBF/A | 7 | 6 | — | — | 8 | 5 | 9 | 7 |
| WTVX/I | 4 | 4 | 10 | 9 | 4 | 5 | 5 | 4 |

Average household share of commercial stations in top 50 markets this past May was 76.9. In May '84, it came to 81.9.

FEEDBACK

Despite ongoing ratings erosion, the Big 3 TV networks have wrapped up their primetime upfront sales for 1989-90 at a record \$3.8 billion vs. \$3.7 billion a year ago, and other dayparts are showing healthy gains. What do you see as the key reasons for this new upsurge in network demand?



"There has been an increase in spending in certain categories such as automotives. The decrease in ratings makes the demand tighter. There is no substitute for network television in its purest sense because of its broad reach. Also, promotional dollars have come into the spending and everybody forgets that a certain amount of dollars which are always hidden by the Olympics have flowed back."

*Robert Igiel
Senior vice president, media
director
N W Ayer*



"There are a few reasons for the upsurge in upfront demand. One reason is the influx of auto advertising. That's a major reason. There were also other categories with an influx of advertising money. I believe fast foods was one. There was another factor—the high cost of scatter during the previous season. A lot of advertisers decided to buy upfront to protect themselves against what happened last season."

*Jay Schoenfeld
Executive vice president, media
director
Backer Spielvogel Bates*



"There are two reasons for the upsurge in demand. First, because there has been an erosion in the ratings, you have to buy more announcements to achieve the necessary audience levels. The second reason is due to the impact of auto advertising with its infusion of additional demand. Of course, when demand is high, the cost-per-1,000 goes up. However, if the automotives don't have a great [model] year, they'll ask for relief. Subsequent quarters [after the first of the season] in upfront buys are not entirely firm, so if sales decline, the automotives won't hold to their full commitment, which could mean that scatter prices will decline."

*Larry Cole
Senior vice president, U.S.
media director
Ogilvy & Mather*



“There was more money available upfront than a lot of people anticipated, particularly from the automotives, but from other categories, too. There are strong indications that more promotional dollars are returning to media advertising. At the same time, planning goals are usually for the same or higher GRP levels than the previous year, meaning everyone needs more commercial units to achieve the same target weight, with ratings generally lower. It’s also possible that buyers ran into saturation of the better syndicated and cable offerings. And just maybe, there’s growing recognition that when negotiations come down to push and shove, network TV is still the best ‘or else’ in town.”

*John Sisk
Senior vice president, director
of network negotiating
J. Walter Thompson New York*



“Ultimately the advertiser and the advertising agencies will decide what’s going to sell products... The upfront sales, I suspect, represents a feeling, whether they like it or not, that they need us, that a mass audience is vital to selling their products, and that ten 1.0 ratings are not as powerful a selling agent as a 10 rating on a network.”

*Howard Stringer
President
CBS/Broadcast Group*



“The No. 1 reason is the strong scatter marketplace in the first, second and third quarters [of 1989], when clients found themselves paying more for units than in the [1988-89] upfront. No. 2 was the increase in automotive, from \$400 million to \$700 million [on the Big 3].”

*H. Weller “Jake” Keever
Executive vice president, sales
ABC Television Network*



“In spite of any audience erosion or program content problems, most major advertisers believe network television is still the most effective way to reach the greatest number of consumers at the same time, so long as the program content is compatible with the product message. And it remains the strongest merchandising tool to motivate an advertiser’s sales force. But to get down to this year’s upfront market specifically, much of it was fueled by new automotive products like Lexus and Infiniti, along with some new products in a number of other categories.”

*Allen Banks
Executive vice president, media
director
Saatchi & Saatchi New York*

In the Picture

Ricardo C. Calvillo



New president of Calet, Hirsch & Spector points to agencies with billings in the mid-range that "have enjoyed some of the best recent growth in the business. It's not easy, but it can be done. And this agency can work in that direction."

Urges extension of creativity to use of media, to meet pressure for accountability

Ricardo C. Calvillo, new president of Calet, Hirsch & Spector/New York, recalls, "We used to take media for granted. That's no longer the case. The pressure for accountability means that if agencies can't show our clients the media we use are reaching their customers, advertising's role in the marketing mix will continue to erode. So we have to keep looking for more accurate ways to measure media delivery. At the same time, we have to extend our creativity to our use of media. We have to keep finding innovative ways to use the new media form as well as new ways to use our traditional broadcast and print vehicles."

Asked about the role of medium sized agencies like Calet, Hirsch in the new world of agency giants, Calvillo observes, "Most of the larger agencies that resulted from the biggest mergers are not the homogeneous monsters some people may picture. Most are made up of several smaller agencies and/or other related business units. And each unit continues to work for its own group of clients, each in its own way."

He points out that such is the case with Calet, Hirsch. The agency is one of several Ross Roy subsidiaries, and Calvillo says, "We continue to work for a fine client list that includes Pepsi Wines & Spirits, Toshiba and Clairol. The average tenure of our clients is 15 years. I think that's pretty enviable in this business. And these clients stay with us because of the level of the creative work we do for them."

Launching pad with potential

Calvillo calls this kind of client track record one that "can be a launching pad with tremendous potential. The fact is, some of the agencies who have enjoyed the best recent growth have been those with billings in the mid-range. Hill, Holliday and Ammirati & Puris are two examples that come to mind. Their creative product for their existing clients has contributed more to their growth than beating the bushes for more new clients."

Following such examples, Calvillo says his new agency's goal is "to continue doing outstanding creative for our current clients and then apply just a little more energy to new business. That's what I'm here for."

Backing up a bit, Calvillo stresses, "I'm not saying it's easy for an agency like ours in the \$75 million to \$100 million range to move on up into the \$200 million to \$500 million range. But it can be done, and we can certainly work in that direction."

He urges, "Add to the outstanding creative product turned out by Neil [Calet] and Peter [Hirsch] the broadcast buying clout of our parent company, Ross Roy, and Ross Roy's well-developed sales promotion and merchandising capability, and I can offer our new business prospects a pretty formidable package. There aren't many agencies that have been able to grow both their advertising and their promotion capabilities as successfully as Ross Roy."

New business targets

Looking at Calet, Hirsch, Calvillo points to its "already respectable presence in the consumer electronics and distilled spirits and wines field with Toshiba and Pepsi. But we're wide open for new clients serving the automotive aftermarket or in the food, food service, soft drinks and fashion categories. And fashion includes areas like home furnishings as well as apparel and accessories."

Calvillo explains that although parent company Ross Roy "has been making a series of selective strategic acquisitions for some time and may continue to do so, these acquisitions have little effect on our operation here except to place at our clients' disposal such additional advantages as their clout in negotiating network television and their strong promotion and merchandising capability."

He adds, "Not every Ross Roy acquisition has been other advertising agencies. Some have been in such related business areas as promotion and public relations. Similar clients handled by such other entities would not usually present a conflict. In the case of Ross Roy's other agencies like Gray & Kilgore or DiIorio, Wergeles, there's always sensitivity to the potential for conflict when approaching a new business prospect in certain categories where one of these other agencies may have a similar client. Then it would be a case of sitting down with both companies first, talking things over, and seeing how they feel about any possible potential for conflict."

Calvillo's first link to advertising was the family business: His father had been one of Detroit's leading advertising illustrators for many years. But he says of the agency business, "Adding so many more facets and skills to illustration and art direction alone intrigued me. So in 1970, I started with Campbell-Ewald in Detroit. While there I had the chance to mix in a number of other disciplines along with illustration."

He points now to all the "interesting changes in this business since my early days in it—not only the wave of mergers and acquisitions, but also the growing demand to make our work accountable, and the pressure to refine our understanding of the forces that motivate different kinds of consumers to act and react."

Legislation for educational grants may take some heat off broadcasters

Before it left on its August vacation, the U.S. Senate adopted a piece of legislation that could have the effect of staving off some of the more onerous aspects of children's television legislation under consideration. By voice vote, the Senate adopted and sent to the House of Representatives S-797, which would authorize up to \$10 million in government funds to cover grants for production of children's TV programs.

As Sen. Ernest F. "Fritz" Hollings (D-S.C.), chairman of the Senate Commerce Committee, pointed out in debate, "This legislation does not require commercial broadcasters or cable operators to carry educational programs. Instead, it will make the programming available at a low cost, a cost that will be substantially lower than the normal cost of production."

Whose baby? The grant program, to be called the National Endowment for Children's Educational Television, would be run by the Commerce Department's National Telecommunications and Information Administration, recently vacated as chairman by new FCC Chairman Al Sikes, and now headed by former FCC executive Janice Obuchowski.

Hollings noted that almost all educational programs for children are generated by public broadcasting but that its resources are limited. His measure also is meant to encourage commercial broadcasters to carry some of the federally backed programs.

"We all know why commercial broadcasters do not air children's educational programming," Hollings said. "It does not pay. While we could and should place certain obligations on them to meet the needs of the children's audience, this, too, has limits. What we need to do is change their incentives and encourage them to air quality programming to educate our children."

The incentive, he said, would be in the form of "more first-rate edu-

cational programming" that would be distributed first to public broadcasters and then to their commercial brethren. Commercial broadcasters would not be allowed to interrupt these programs with commercials, however.

Sen. Daniel Inouye (D-Hawaii), Communications Subcommittee chairman, explained that the grants would be given to those who would produce children's educational programming. The programs would be limited to public broadcasting for the first two years after their production and then be made available to commercial TV stations and cable operators, supposedly at a price far cheaper than normal production costs incurred for other programs commercial stations now show.

Commercial TV fee. The fee levied on commercial users is indeterminate, but NTIA is to assess one that would "assure the maximum practicable distribution." The grants can be up to 75% of the "reasonable" cost of production. The \$10 million authorized, still subject to the actual appropriations process, would be for the fiscal year beginning Oct. 1.

The timing of S-797 may not be the best for proponents of legislation to force commercial stations to carry more educational programming for children. Groups that often are enemies had agreed on compromise legislation that would limit the number of minutes that could be devoted to commercials during children's programs. Those who normally don't like such interference with free enterprise accepted the compromise because it would mean that more restrictive legislation would not be passed.

But the endowment legislation also could give members of Congress a chance to duck even the compromise proposal and vote it down, opening the process once again to the tougher efforts championed by such members as Sen. Timothy Wirth (D-Colo.).

GAO report on cable hikes: whose version?

All had read the same report by the General Accounting Office. The agency's associate director John Ole said, "Average monthly rates for the lowest-priced basic [cable] service increased by 29%, while rates for the most popular basic service increased by 26%."

James P. Mooney, president and CEO of the National Cable Television Assn., whose industry Ole was referring to, said, "the average cable subscriber's monthly bill went from \$21.58 to \$24.68, an increase of 14%."

Rep. Ed Markey (D-Mass.), chairman of the House Telecommunications Subcommittee, conducting the hearing, said, "The GAO found that monthly rates for the lowest-priced basic cable service and most popular cable service increased significantly—by more than 25%."

And finally, Bob Bolen, Fort Worth, Tex., mayor representing nearly all the nation's mayors, said, "The survey demonstrates that 45% of the cable operators reported increases in excess of 30%, and almost one-fifth reported increases of more than 50% during the same time period."

No liars. All were correct. And all were engaged in one of Washington's favorite games—spin control. Each had his own reasons for emphasizing a particular part of the GAO report on the changes in rates since the cable industry was deregulated effective with the beginning of 1987.

Other members of the subcommittee not only had their own unique readings of the figures, but many had suggestions for the GAO to include in another report it promised to make on cable rates by next spring.

The next report from the GAO is supposed to provide much more detail, just ahead of still another report, from the FCC on the impact of the 1984 cable act.

One question many members wanted answered was that, since the responses to the GAO survey of cable systems was voluntary, how

much did the rates go up at the nonresponding systems, and how would that have affected the overall average?

Patrick toasts, Nader roasts in parting shot

Dennis Patrick had intended leaving the chairmanship of the FCC on a high note. In a final interview with a group of trade reporters, he refrained from any vindictive

statements, although he did engage in some "I-told-you-so" rhetoric.

But then consumer advocate Ralph Nader launched a "booby prize" award, with Patrick as the first recipient. Dubbed the "Tin Toaster Award" in reference to Patrick's predecessor having called television "a toaster with pictures" to justify widespread deregulation, Nader said Patrick won it for leaving the telecommunications industry highly concentrated in the hands of a few.

As one of his last acts in office,

Patrick had the last word, awarding his own "National Nanny Award" to Nader for being in favor of "government control," whose "heavy-handed approach would stifle diversity and economic growth in an effort to protect the American people from themselves."

Accusing Nader and his cohorts of being "long on rhetoric and short on substance," Patrick said that in the broadcast area "the commission's open-entry, procompetition policies have produced the most rivalrous, diverse media market in

the marketplace

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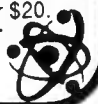
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Patrick, Dennis: the last waltz

Outgoing FCC Chairman Dennis Patrick and Commissioner Patricia Diaz Dennis, expected to be leaving the agency herself soon, often clashed over philosophy during

Dennis disagreed with the granting of multiple ownership waivers.

commission proceedings. The final meeting of Patrick was no exception.

Dennis disagreed with the overall decision of the agency to grant waivers of part of its multiple own-

ership rules. Now, instead of disallowing any radio and television station combinations in the same market, the commission says it will "look with favor" on applications for a waiver of the rule in the top 25 markets where there are at least 30 other voices, particularly if one of the parties to the proposed merger is a "failed station."

Dennis fought the relaxation of the item as it applies to the top 25 markets, "because I believe the top 25 standard is already too permissive."

the marketplace

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Patrick delivers some final thoughts on years at FCC helm

Between his last commission meeting and a farewell party at which he was roasted, FCC Chairman Dennis Patrick sat down with a few reporters to share some last thoughts on his years at the helm of the agency.

On his stormy relationship with Congress: "There's no question that the fact that the fairness [doctrine] item came up in the first months or so of my tenure created difficulties, but that was a timing created by the United States Court of Appeals. The conflicts that we had with Congress have been policy driven."

But he then noted the friendliness he met during his last appearances on the Hill, and added, "I don't leave with any great sense of ill will or disappointment in terms of institutional relationships. I think on a personal level, they're probably good. They also know that I feel very strongly towards policy and that where I have the votes, I will secure those policy goals. There's sort of a political conflict inherent in the systems. My favorite quote from myself is if you want to have perfect relations with members of the opposition in Congress, there's an easy way to do that. It's do nothing."

Advice for successors

He has some advice for others who would be commissioners: "It's important to have a very clear sense of where you want to go, a clear sense of policy priorities. At the same time, it's important to be willing to listen and adapt your program and your goals as you learn more about those topics, more about those policy goals. And that's something that we did, contrary to what you read sometimes. We adapted, modified a lot of our policies very substantially, by and through the oversight process, by and through the process of reviewing the comments that were filed."

On micromanagement of the FCC by Congress: "That is a very big, important institutional question that implicates questions of constitutional law, questions of process, appropriate processes, etc. There is a certain ambivalence in Congress towards the independent agencies. On the one hand, they created agencies intentionally as independent institutions and they set up a process whereby that agency is to weigh various pieces of information and then to reach judgments in the public interest. The standard that was given to this agency, anyway, the public interest standard, is a standard which is necessarily something, in the final analysis, judged by the various commissioners. My point being that the process is one that contemplates independence.

"It is a process that contemplates education, but finally decisions by commissioners, who are sitting here trying to do the right thing as best they can based on all the information they have. If that's not the process that Congress wants, they need to change the

organic statutes at the various agencies. There are tradeoffs, and there is a certain amount of ambivalence in Congress as it plays in the agencies. Sometimes in very technical areas and in very politically sensitive areas, Congress is very happy to have the agency exercise its independence. In other areas, the Congress wants to be more involved. That isn't necessarily bad.

"By and large, I think the process works well, and I do not begrudge the Congress and the various members thereof the opportunity to say what they think and to lean on the commission, if you will, to move policy in the direction in which they think is appropriate. That's part of the process. In the final analysis, the commissioners have to make a judgment."

Disputes Markey comment

Patrick accepted an opportunity to dispute a statement made on this page by Rep. Ed Markey (D-Mass.) chairman of the House Telecommunications Subcommittee. Markey declared the Reagan era over at the FCC. Patrick responded, "I don't think that period of time or reliance upon markets, or more freedom, be it economic or political, rather than less, is at a close.

"Certainly there were major structural decisions that were made over the last eight years and it may be that we're now looking at a period of adjustment, a period of fine-tuning of these matters. But my view generally is the ship has left the dock with respect to the utility of relying more on markets and less on government, in both broadcasting and telecommunications, and we're not going back. It's just a question of adjusting the rudder."

On his term as FCC chairman: "I think we've done very well. I think we've accomplished a great deal of the agenda that we set out. Could we have accomplished more? Yes, I would have liked to have secured the abolition of the compulsory license. That was a frustration. Maybe I should have beat on that drum even earlier and pressed my case in Congress even earlier for the abolition of the compulsory license. It would have been nice to reform the comparative renewal process to actually provide for comparative criteria that are different, but that is an issue that literally 20 years of commissions have struggled with and never been able to effect a dramatic change in the way we approach that question.

"Overall, in terms of promoting First Amendment values, in terms of promoting freedom of contract, intellectual property rights, curbing abuse on the broadcast side, on the telephone side, saying, 'Hey, wake up, the world is different'... I feel good about having gotten the debate out there with respect to telco entry. So I'm sorry, I can't put a bad face on it. I feel very good. And I'm equally elated about going to the private sector, I have to tell you."

And about his plans, he says, "I have not been interviewing, I really haven't. But now I'm anticipating with great joy the prospect of talking to some folks next week. Law is a possibility, but business is a possibility, too, and both coasts are open. West or East, both coasts are still open. I have a fiance that leans east."—**Howard Fields**

MAJOR BROADCAST MEETINGS, SEMINARS AND CONVENTIONS

1989

| | |
|------------------------|---|
| August 27-29 | Eastern Cable Show, Merchandise Mart, Atlanta |
| September 12-14 | National Hispanic Market Trade Show & Media Expo, Century Plaza, Los Angeles |
| September 13-16 | Radio-Television News Directors Association Convention, Kansas City Convention Center September 4 Issue |
| September 13-16 | NAB Radio '89 Convention, New Orleans September 4 Issue |
| September 20-October 1 | Prixitalia, Perugia, Italy |
| September 22-27 | Cinetex '89, Bally's Casino Resort, Las Vegas |
| October 3-5 | Atlantic Cable Show, Atlantic City Convention Hall |
| October 12-16 | MIPCOM International Market, Cannes October International Issue |
| October 15-18 | American Children's Television Festival, Ambassador West, Chicago |
| November 2 | Asta/Independent Programme Producers Association, Hyde Park Hotel, London |
| November 5-8 | Community Broadcasters Association Convention, Riviera Hotel, Las Vegas |
| November 13 | London International Advertising Awards, Royal Lancaster Hotel |
| November 13-15 | Television Bureau of Advertising Annual Meeting, Century Plaza, Los Angeles November 13 Issue |

1990

| | |
|-------------------|---|
| January 3-6, 1990 | Association of Independent Television Stations, Century Plaza, Los Angeles January 1 Issue |
| January 16-19 | NATPE International, New Orleans Convention Center January 15 Issue |
| January 18-21 | Radio Advertising Bureau, Annual Managing Sales Conference, Loews Anatole, Dallas January 15 Issue |
| February 11-16 | International Television Festival of Monte Carlo, Loews, Monte Carlo February Television/Radio Age International |
| March 31-April 3 | National Association of Broadcasters, Atlanta March 26 Issue |
| April 20-25 | MIP-TV, Cannes France April Television/Radio Age International |
| May 19-22 | CBS-TV Annual Affiliates Meeting, Century Plaza, Los Angeles May 15 Issue |
| May 21-23 | National Cable Television Association Convention, Atlanta Convention Center |
| June 12-14 | ABC-TV Annual Affiliates Meeting, Century Plaza, Los Angeles June 4 Issue |

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