Television/RadioAge

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Strong web upfront, sluggish economy among factors/27

ROAD TO NATPE
Early fringe marketplace flooded with off-net sitcoms/30

THEME NIGHTS
TV networks weighing merits of program blocks/34

November 13, 1989 • $3.50

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Host: Pat Finn

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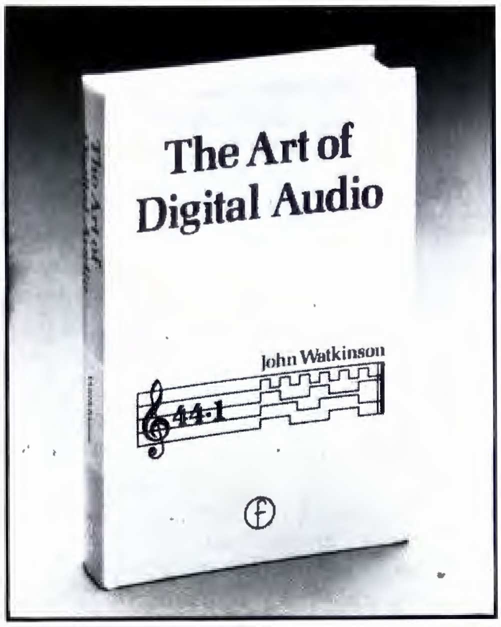

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Publisher's Letter

TV forecast time is here again, but the crystal ball is cloudy

The annual ritual of forecasting next year's TV broadcast sales is upon us, as reflected by our lead story in this issue. The article makes apparent that we're faced with more than the usual amount of on-the-one-hand-this and on-the-other-hand-that. Even in the case of the networks, which everyone agrees had a great upfront season, there are nagging questions about whether clients will cash in their chips next year via their cancellation options. The bottom line, however, seems to be that it will be a pretty humdrum year in '90 for broadcast TV sales.

What's behind it all? Is it the economy? Is it the fragmentation of media? Is it client spending on retail promotion or other marketing services? Should we expect less of an increase when inflation is under control? Do advertisers have less faith in advertising?

To take the most fundamental question first: There is no—repeat, no—sign that advertisers are losing faith in advertising. Spending on advertising in general is expected to be up. Clients appear to be accepting the fact that the costs of promoting products and services just keep rising every year.

True, clients are searching for other media options and there's a growth in "niche" media. Some of this is a reflection of dissatisfaction with current media effectiveness or efficiency. There have been, for example, claims that network TV is losing its selling power. The networks, however, are striking back with value-added promotions and a joint effort to prove their effectiveness, though the latter appears to be slow in getting underway.

The economy. There doesn't seem to be a recession in the offing, though there's talk of a "soft landing" next year, whatever that means. The latest report from the Federal Reserve on economic conditions speaks of "mixed" consumer spending and "mixed" manufacturing activity. Maybe this "slo gro" is better than an overheated economy, but it sure doesn't make for healthy advertising sales.

There has been much said about promotion depressing the growth of conventional advertising and, hence, negatively affecting brand building. The agency media executives quoted in our story indicate that promotion has reached a peak and may be on a plateau, but there are other signs that there's still some growth left.

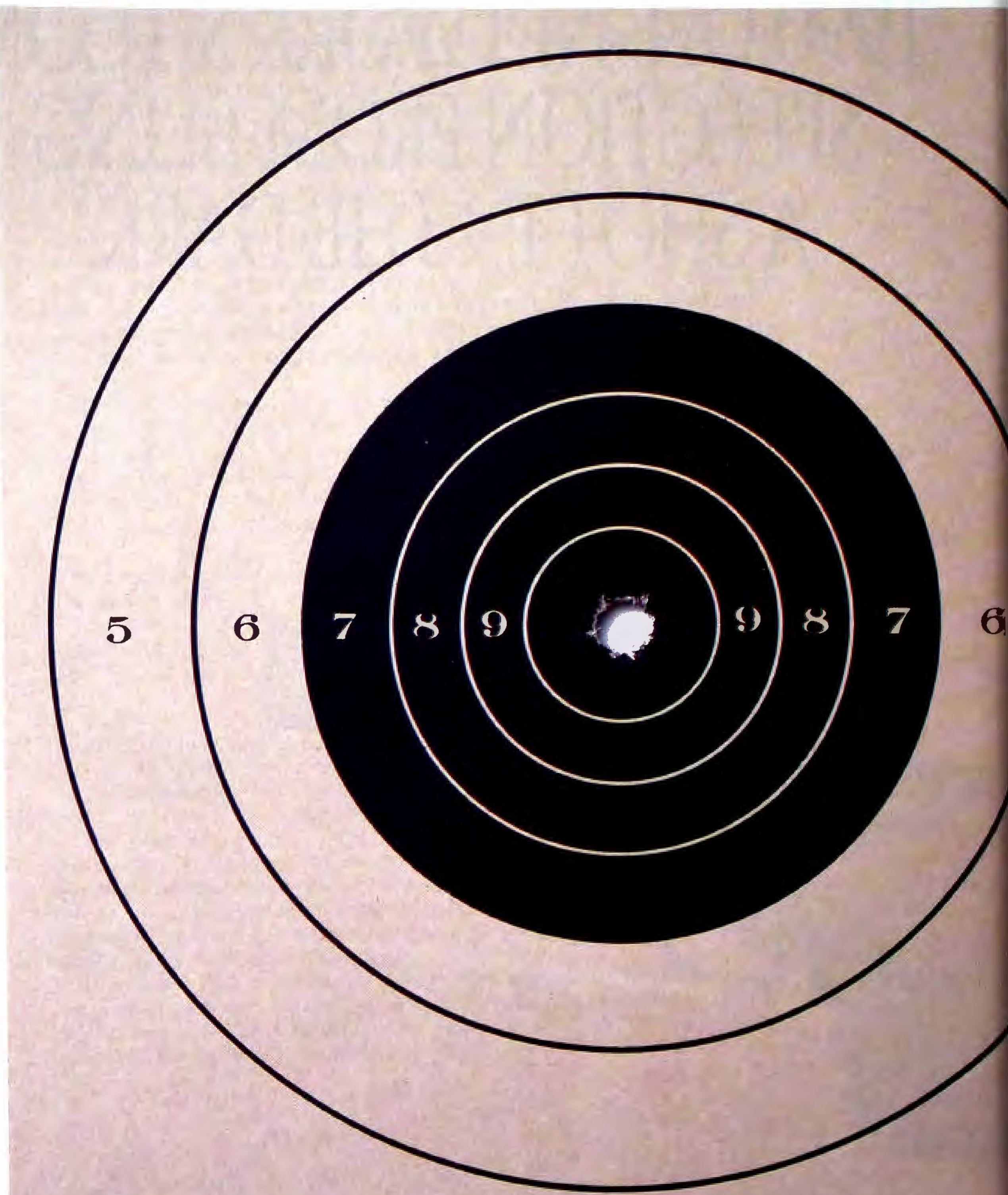
The predictions in our story by four different sources regarding the growth of TV broadcast ad expenditures next year do not differ much, averaging between 6 and 7%. That's not too bad. Applied to TV stations, it would be an improvement over this year. Our *TV Business Barometer* shows through the first three quarters of this year that national/regional spot is up by only 2.2% and local by 5.1%.

One factor that must be taken into account is that TV is a mature medium, a statement that will surprise nobody. Maybe one of the problems is that some of the excitement has gone out of TV as an advertising medium. Maybe somebody needs to bring it back.

S.J. Paul

HOW TO KEEP YOUR 1990 OFF-NETWORK SITCOM SELECTION FROM BEING A SHOT IN THE DARK.

TURN ON



THE LIGHTS.

For years, programming executives have argued about why so many high-priced sitcoms that were hits on the network miss the target by a mile in syndication.

In reality, it's all quite simple. To score big as a strip, a once-a-week prime time hit has to have an audience made up of the same type of people who watch sitcoms five days a week.

That's why "ALF," "Head of the Class," "The Hogan Family" and "Perfect Strangers" from Warner Bros. will shine in your '90-'91 sitcom line-up. They all have prime time comps made up of the viewers that you need for sitcom success — the same type of people that watch syndication's longest running successes. So our hits on the network now will continue to be stripping winners for years to come.

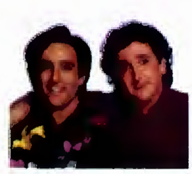
Need help aiming your '90-'91 line-up away from the disappointments and towards the bull's-eyes? Let Warner Bros.' comedies take a shot at reaching your target audience.

Funny Shows. Serious Business.


ALF


Head of the Class


The Hogan Family


Perfect Strangers

WARNER BROS.
DOMESTIC TELEVISION
DISTRIBUTION

Syndication screenings cut as distributors back out

The decision by several major syndicators to drop their separate presentations of new shows to reps and stations prior to the INTV and NATPE conclaves has developed into the cancellation of the meeting this year run by Harrington, Righter & Parsons. TeleRep, reportedly, will also cancel. A third rep, MMT Sales, is hosting a program-preview session in any case, as it has previously, while one station group, McGraw Hill Broadcasting, is paring its screening event.

At MMT Sales, Jon Gluck, corporate vice president, programming, says the rep company will hold the screening session Dec. 12 and 13 despite the major syndicators' pull-out. "We feel having the screenings is a service to our clients, even if the major syndicators aren't there. It's their loss, and the gain for the smaller guys."

Tried but couldn't. At HRP, Jim Curtin, associate director of programming services, says, "We tried to organize [a screening] but couldn't get enough major syndicators to participate and we felt it wasn't worth stations' efforts to travel to New York to see mostly minor properties."

The stations repped by HRP feel the syndicators' decision has been ill-advised, continues Curtin. "I think the stations felt the screenings were very beneficial, and I stand with them in this regard, naturally." Unfortunately, according to Curtin, the screenings were unjustifiably blamed for problems experienced by some syndicators because they claimed there were too many programs in the mix for stations to give them full attention.

But, says Curtin, "that's the syndicators' opinion. Stations found them very valuable and supported some of the programs early because of the screenings, and I think you will find a return to screenings. At this point, the events are being the whipping boys for syndicator failures of last year." HRP was the first rep to hold a screening for stations, says Curtin, two years ago. Last year HRP canceled the meeting because of the illness of Dean McCarthy, who was vice president, director of programming services until his death in October

Will limit stations. McGraw Hill Broadcasting, which had been part of a larger screening group consisting of a number of stations and station groups, is expected to narrow the station screening audience to only its four owned stations, according to David Ingraham, senior vice president. The conference is set for the week starting Dec. 4 with an open invitation to all syndicators. However, the screenings are for viewing of strips only, says Ingraham, "We are not interested in weekly or one-time-only shows. That's material that best can be covered by our individual stations at NATPE."

CBS' 'next phase' effort to promote older demos

The CBS TV network is moving into the second phase of its recent push to stress the importance of older demos as product purchasers. This follows release of the study, *The Shifting American Marketplace*, sponsored by CBS Marketing and Time Inc. Magazines, in conjunction with Age Wave Inc. (see TV/RADIO AGE, June 26).

The new presentation, which will be ready during the first quarter of '90, will "show how to buy network TV better" and will include such data as the median age of buyers of key TV-advertised products, according to David Poltrack, senior vice president, planning and research for CBS Marketing. Like the Age Wave study, the new effort will stress that "35–54 is where the action is."

A key tactic in the new study will be to undercut the argument that clients buying 18–49 audiences will also wind up with sizeable numbers of 50-plus consumers on the grounds that they watch a lot of TV. On the contrary, says Poltrack, the indications are that shows high in 18–49 numbers—for which clients pay a premium—will have a disproportionate amount of 18–24s.

Data gathering along these lines is now going on, but Poltrack says that preliminary research suggests that such assumptions about shows high in 18–49s are true. The marketing executive also says that presentations will be tailored for specific client categories.

Ad effectiveness project. Meanwhile, the three-network project to prove that web advertising works will probably be ready for next year's first quarter, says Poltrack, despite the fact that an executive director of the planned three-network promotion association still had not been chosen as of presstime. But some projects are on hold, the CBS executive admits.

The ad effectiveness project was described by Poltrack as designed to be the most comprehensive study of its kind. Supported by three networks, who will bear about half the cost, plus 22 advertisers and two agencies—J. Walter Thompson and Leo Burnett—the study will consist of an exhaustive analysis of perhaps 300 case histories gathered from data assembled by Information Resources Inc.

Broadcast to be added to cable planning system

The Cabletelevision Advertising Bureau has trotted out CableCume, its new computerized reach and frequency planning system it says enables planners for the first time to analyze reach and frequency of cable schedules across a wide range of demographics for several standard Nielsen dayparts. It's a system CAB plans to expand to give planners the capability to look at combinations of cable and broadcast television schedules by next month, when the next get-together of the Advertising Research Foundation rolls around. CAB vice president, research, Jonathan Sims says the averages that form the data base for CableCume were derived from over 750 cable schedules.

CAB is showing the system to the major agency media research chiefs first, and Sims says it's enjoyed good agency acceptance because:

- It fills the cable void in planners' ability to analyze cable.
- Of its ease of use, either as a stand-alone software system or as one easily incorporated into an agency's existing broadcast television reach and frequency system.
- All data appears on a single screen display "with the look and feel of what agencies are already familiar with in their existing broadcast television computer systems."
- It allows planners to input their GRP target, "and out comes the reach and frequency."
- Although over $30,000 was invested to produce the data and create the resulting software, "It's free to agencies and advertisers as another CAB service to the industry."

User friendly. CAB president Robert Alter says the system is so user-friendly "It now makes it easy for a planner to determine just how much cable is needed to reach the GRP goal. This way a planner can see quickly what cable can add to the media plan and easily develop the strategic rationale for using cable."

Symposium stresses HD in the 'simulcast' mode

The trend in engineers' thinking favoring a so-called simulcast system over the augmented channel approach for high definition TV was very apparent at the recent HDTV symposium conducted in New York by Columbia University's Center for Telecommunications Research. Of the five HDTV system propenents who were present, all but one were either planning to offer a simulcast system for testing by the Advanced Television Test Center and Cable Television Laboratories or were leaning in that direction. And the one exception was "looking at" the idea of a simulcast system.

The simulcast-type HDTV system provides for a basically unmodified NTSC channel plus a non-NTSC HD 6 MHz channel which might or might not present the same program. The assumption is that NTSC would wither away eventually. Augmented channel systems call for an NTSC-compatible channel to which a channel of either 3 or 6 MHz would be added to achieve "true" high definition. Until this year, the augmentation approach appeared to be the system of choice, and Zenith was pegged as a latecomer and maverick with its simulcast philosophy and its odd 787.5 line screen, exactly 50% more lines than NTSC.

Philips switch? In addition to Zenith, NHK and the Massachusetts Institute of Technology offered simulcast proposals at the CTR symposium. North American Philips spoke for an augumentation system, but C.A.A.J. Greebe, NAP's director of electronics research, told *Focus* that NAP will be deciding between an augmentation and simulcast system, and he's betting on the latter, which, he maintains, U.S. broadcasters favor. The David Sarnoff Research Center, supported by NBC and Thomson Consumer Electronics (RCA) described its Advanced Compatible TV systems—ACTV I and II. Sarnoff's John Henderson, head of system technology research, commented to *Focus* that the center was looking at the simulcast approach and had been doing work in that area. However, he felt that in the time frame allowed, augmentation was more practical.

Two steps. ACTV is the only one of the proposed U.S. HDTV systems that provides a two-step version. ACTV I is a single-channel NTSC-compatible signal with some improved resolution and a wide-screen picture. This could be introduced, say its proponents, with a minimal cost to broadcasters. ACTV II, described as "true" HDTV, is a two-channel augmented system.

Henderson indicated his belief that simulcast systems are not fully developed into true HDTV. "In time," he said, "simulcast technology will work."

Definitive answers to the simulcast-vs.-augmentation argument are still not known, engineers agree. There is still a question, for example, whether a 12 MHz augmentation system with NTSC "impairments" would provide a better picture than 6 MHz of a HD system, with up-to-date technology and no NTSC impairments.

EMRC policy disputed

Will the decision of the Electronic Media Rating Council not to accredit TV market rating reports in which stations or clients pay for additional sample dampen purchases of added samples? It might, says John Dimling, Nielsen executive vice president and group director of marketing. Both Nielsen and Arbitron oppose the EMRC policy.

The Council board voted unanimously for the policy late last summer on the grounds that reports with additional sample are, in effect, customized. Any deviation from standard procedures already accredited should not be considered a part of the regular syndicated service, it was argued.

Some stations feel that the purchase of added sample could influence the rating numbers or even the rating service, but Dimling says the only effect is to reduce the sampling error. Executive director Melvin Goldberg of the EMRC was careful to note that "although the purchase of extra sample may be perceived to influence the ratings, the EMRC position should in no way reflect on the ratings service practice of adding sample or on rating service methodology or on possible bias resulting from added sample."

The EMRC took its position despite studies by Arbitron and Nielsen five years ago that found no bias resulting from the added sample, a fact Goldberg duly noted in the policy announcement.

About 35 market reports have included added sample. The new policy will take effect in '90.

Use of news dramatizations defended by IRTS panelists, dubbed non-issue

The increasing use of dramatizations by network TV news programs sparked the most comment as panelists addressed an International Radio and Television Society "Newsmaker" luncheon audience.

The panelists at the session, billed as "The Changing Face of Journalism," were: Don Hewitt, executive producer of CBS' *60 Minutes;* Av Westin, the onetime ABC News exec who now serves as senior vice president of reality-based programming at King World Productions; Mary Alice Williams, the former CNN vice president and anchor who now coanchors NBC News' *Yesterday, Today and Tomorrow* magazine; and Everette E. Dennis, executive director, Gannett Center for Media Studies at Columbia University. Moderating the all-question-and-answer session was James Rosenfield, chairman/CEO, John Blair Communications, and first vice president of IRTS.

"I don't think there's a blurring of the lines in news" due to the greater use of re-creations, Williams maintained. Rather, she contended, "There is a blurring of lines when you see [former Democratic House leader] Tip O'Neill coming out of a suitcase [in a TV commercial] promoting a hotel chain.

"A phony issue." Hewitt observed that NBC's news magazine and CBS' *Saturday Night with Connie Chung* have been "doing a very good job of labeling re-creations."

Dennis' main objection, he said, was to ABC News' omitting mention that its *World News Tonight* video footage on diplomat Felix Bloch allegedly exchanging spy documents with Soviets was a simulation. Generally speaking, he felt, "All journalism is re-creation" in some form, with reporters relaying to viewers what has happened in closed meetings, for instance.

"It's a phony issue," Westin said of simulations. "ABC made a mistake" with its omission of a disclaimer in the Bloch footage but has apologized. "That horse has been beaten, kicked, whatever." Westin also dismissed concern that docudramas might mislead viewers into thinking the news divisions are involved. "The audience is a lot smarter than perhaps we are giving them credit for," he said, adding they know ABC's *The Final Days* is not in fact showing Richard Nixon himself.

When asked by Blair's Rosenfield about NBC Entertainment's recent pact with McNeil-Lehrer Productions for a package of primetime health-care specials to be hosted by C. Everett Koop, the former U.S. Surgeon General, Williams replied that that is "certainly within the purview of the entertainment division," although "we could argue the NBC News division could do [them] better." "I don't care who does it as long as it's responsible," added Westin.

Other concerns. Citing various concerns people have with news and reality-based programming trends, Westin said, "The marketplace is a real governor ... Ethics and taste are clearly a factor in the longevity of a program." When he mentioned an "advertiser hit list" for tabloid series deemed unacceptable, such for as Morton Downey Jr.'s, Rosenfield interjected, "Advertiser hit lists are a big problem" and not an appropriate way to deal with the situation.

In the Q&A session, the recent controversy over allegedly faked Afghanistan war footage sold to CBS News by a freelance producer was decried by Hewitt as "a crazy story" generated by the tabloid *New York Post*. Westin observed, "We were always aware we could be 'taken' " by outside producers offering sometimes "obviously questionable" footage. "You can be burnt" when making "judgments by instinct" in a highly competitive climate, he warned.

N. Orleans, Philly form multimedia news ventures

WWL-TV New Orleans, one of several TV stations forging news links with Cox Cable Communications (TV/RADIO AGE Oct. 2), has just begun *Eyewitness News Watch* in partnership with Cox Cable New Orleans Inc.

The new service, billed as "the first 24-hour local news service" on cable, simulcasts $4\frac{1}{2}$ hours of WWL local news programming live each weekday plus two hours daily during weekends. Each program then is repeated on the cable channel with updates as needed. WWL also will produce a new Sunday morning news show exclusively for the 78,000-subscriber Cox Cable New Orleans. The joint venture will be tested for a year.

Meanwhile in Philadelphia, WPHL-TV, an independent, is forming a local news partnership with the top-rated all-news KYW(AM), effective Jan. 8.

KYW will supply local news material via fax to the TV outlet, which will then turn that material into three 60-second news updates per night, anchored by WPHL's Neil Hartman. In return, the radio station's promotion spots will run on the indie.

Manning *the master control room at Cox Cable New Orleans is Steven Warren, coordinator for "Eyewitness News Watch," involving Cox and WWL-TV.*

"THE ROAD TO NATPE"—1990

Part IV (Prime Time) December 11th Issue

(Advertising Forms Close November 27th)

	ISSUE DATE	CLOSING DATE
Part I — Daytime	October 30	October 16
Part II — Early Fringe	November 13	October 30
Part III — Access	November 27	November 13
Part IV — Prime Time	December 11	November 27
Part V — Late Night	January 1, 1990	December 18

Special Convention Issues are:

	ISSUE DATE	CLOSING DATE
INTV Issue	January 1	December 18
NATPE Issue	January 15	January 1
POST-NATPE Issue	February 12	January 29

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Sidelights

Viacom readies to crown Miss America Pageant licensees

Viacom Enterprises, newly named global licensing and merchandising agent for the Miss America Pageant, has begun its pursuit of potential licensees in at least six key women's and children's categories.

In what the companies called the pageant's "first comprehensive licensing agreement" in its 68-year history, Viacom will focus on marketers of cosmetics, fragrances, luggage, toys/dolls, health care products and books, according to Peter Newman, Viacom's senior vice president, ancillary rights and special projects. The licensing effort will concentrate on the Miss America name and the familiar crown logo rather than on the specific pageant winners.

Miss America's *crown logo will appear on various women's and children's products if agent Viacom succeeds in its task.*

An unspecified portion of the Miss America Pageant's share in the licensing income will be applied to its scholarship funds, says Leonard C. Horn, chairman of the Atlantic City, N.J.-based pageant. The pageant today is "the largest scholarship foundation for women in the world, with scholarships totaling over $5 million," he notes.

Beautiful Nielsen figures. NBC's latest live Miss America telecast, in which Debbye Turner, a black, won the title, averaged a 20.0 rating and 41 share in the Nielsens, to rank third for the week ending Sept. 17. Besides ranking No. 4 among women 18–49, the pageant helped NBC to its 65th consecutive weekly ratings victory. The pageant's ratings were closer to 1987 levels than to a year ago, when the NBC event scored a 22.3/44 and ranked No. 1 for the first time since 1982, thanks to competing against and trouncing college football games on both ABC and CBS.

Viacom already licenses such properties as *The Honeymooners, Mighty Mouse, The Twilight Zone* and model/actress Carol Alt.

Way up north, Alaska station ancient/modern link

KYUK-TV Bethel, Alaska, serving a population of 4,500 on the remote tundra halfway between Anchorage and the Soviet border, offers more than PBS series like *Sesame Street* and *The MacNeil/Lehrer Newshour*.

It also produces a daily local news program—in English and the Yup'ik tongue of native Eskimos—and other bilingual local-appeal shows and documentaries.

Owned and operated by Native Americans, the PBS affiliate is credited by anthropologists as a major reason the Yup'ik language has survived in this market's 52 small Eskimo villages. PBS officials add that KYUK also serves as a repository for the visual history of southwest Alaska—where the Yup'iks date back 12,000 years. Its documentaries, moreover, have been shown by Washington's Smithsonian Institution and New York's Museum of the American Indian.

PBS' hands across Canada's border

Public Broadcasting Service not only reaches across the U.S./Canada border but also generates a goodly amount of membership funds from Canada.

About 3.3 million TV households to the north tune into PBS' programs—some of which are Canadian-produced, like *DeGrassi High, The Struggle for Democracy* and *Wonderworks: Anne of Green Gables*. Canadians send in $10 million-plus to PBS stations on the U.S. side of the border, PBS estimates.

CBS News court artist proves ready for primetime

Bill Robles, who has worked for 19 years as a courtroom artist for CBS News, recently broke out of the news realm for a primetime stint.

For CBS News, Robles has sketched the participants in such major California cases as the Charles Manson trial and the "Night Stalker" trial. He recently was hired by Avnet-Kerner Productions to draw courtroom sketches for *Do You Know the Muffin Man?* a TV movie about child sex abuse.

The artist in July drew likenesses of the movie's stars Pam Dawber, John Shea, Brian Bonsall, Matthew Laurance, Anthony Geary and others for use in the courtroom sequences of the movie, which scored a 30 Nielsen share for CBS in Oct. 22 primetime.

"Episodes," *a new six-times-yearly magazine solely about ABC's four soap operas, will begin publishing in February. ABC Daytime Circle Inc., New York, plans a post-Thanksgiving on-air daytime push aimed at starting with a circulation of 2 million.*

TV Business Barometer

Big local month but small increase

September is a big month for local TV advertising, including back-to-school and fall apparel, but, in terms of growth over the year before, this past September was not a big month at all. In fact, it sported the next to the lowest percentage increase for local business during any '89 month to date. And it ended a quarter that was none too exciting.

The local increase came to 2.4%; the only lower percentage figure in '89 was for July, in the same quarter, which registered a 2.0% increase. In between, August showed a little life with a 6.1% rise.

But September topped $600 million in local business for the first time since May. By coincidence, the two months showed identical billings—$611.9 million, the highest monthly level for the year to date. This compares to $535.4 million and $444.9 million for August and July, respectively.

The smaller stations—those in the under-$7 million annual revenue bracket—showed the highest percentage increase for September, which marked the 11th consecutive month that this station category ranked first in local time sales performance. The over-$15 million bracket was up modestly and the $7–15 million category was essentially flat (see numbers below).

The third quarter was the weakest in year-to-year performance for the year to date. Local time sales for the summer rose only 3.5%, compared to 6.6% for the first quarter and 5.5% for the second. Third quarter billings came to $1,592.2 million, compared to $1,538.4 million for same period in '88.

However, the local time sales total for the July–September period topped that of spot, which amounted to $1,557.8 million. Local business topped spot in the first quarter, too, $1,322.9 vs. $1,285.2 million.

Spot is still slightly ahead of local for the nine months to date. Local volume in '89 through September amounted to $4,563.2 million, while the spot total was $4,572.7 million.

Local's increase in '89 through September amounted to 5.1%, compared to 2.2% for spot.

Network comp

Network compensation, which has been unexpectedly brisk this year in light of all the web talk about reducing it, and considering that it was down last year, came up with one of its best months in September. The increase amounted to 8.8%, the second best percentage increase of the year to date. The station take was $39.8 million vs. $36.6 million in '88.

Network comp was up 6.6% for the quarter, making it the best quarter in '89 performance. The three-month billings total was $123.7 million. Total for the nine months was $361.0 million, up 5.1%.

September

Local business +2.4%

(millions)

1988: $597.6 **1989: $611.9**

Changes by annual station revenue

Under $7 million	+19.6%
$7–15 million	+0.02%
$15 million up	+4.4%

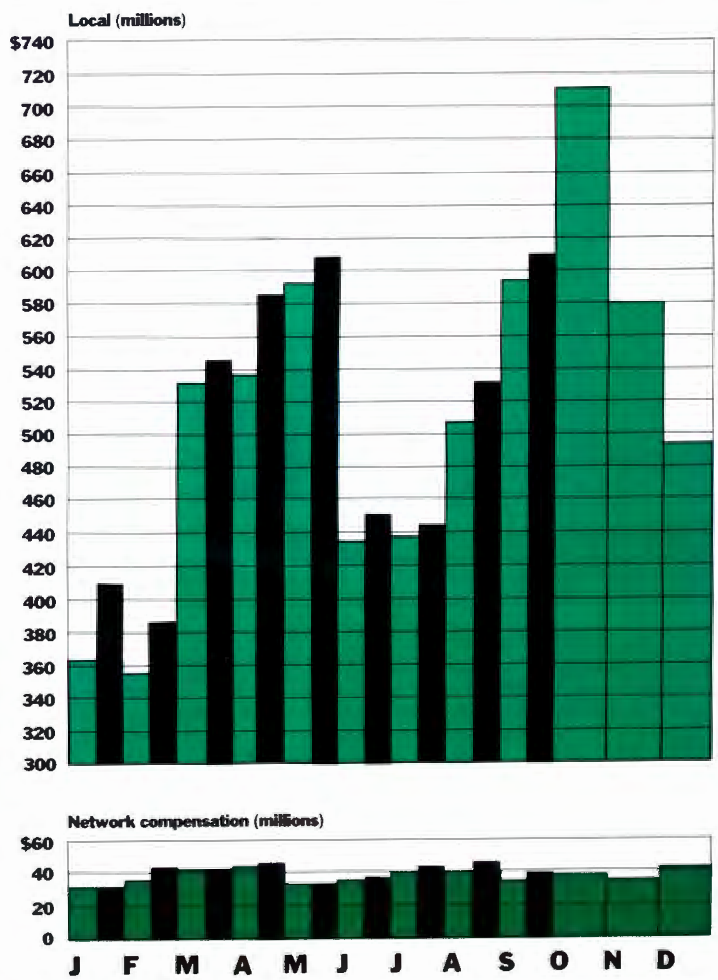
Network compensation +8.8%

(millions)

1988: $36.6 **1989: $39.8**

Changes by annual station revenue

Under $7 million	+16.4%
$7–15 million	−2.0%
$15 million up	+10.3%



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F INFLUENCE

U.S. European barter battle rages in London hotel ballroom; U.S. enthusiasm met by cynicism

Another round in the continuing clash between American Advocates of barter and the European opponents to the approach took place earlier this month in the relative civility of a London hotel ballroom. In a conference sponsored jointly by the Advertiser Syndicated Television Assn. and three British organizations, the two sides frequently disagreed on the value of trading airtime for programming.

For their part, the Americans tended to draw on their own experience, optimistically believing that barter offered a worthwhile way of providing programming throughout Europe. In contrast, the European response, especially voiced by the British, was cautious and defensive. From a practical standpoint most European broadcasters do not have any reason to barter at this time. Not only are most of the terrestrial broadcasters fully booked, there also is a waiting list for advertisers in countries which severely curtail the number of commercial minutes allowable. The Americans are convinced that the increasing number of stations going on the air will result in altering the traditional entrenched position of the current broadcasters, giving barter a chance.

Editorial control. There also is concern among many Europeans that any programming funded by advertisers is at risk of being editorially controlled by their agencies. Nevertheless, despite their opposition, most of the European participants did not rule out the need for further discussion on the topic.

The conference opened on a positive note. Paul Styles, director of the British Independent Program Producers Assn., stressed the need to consider an innovative approach to finance programming. Styles' comments reflected many concerns shared by British independents and broadcasters: Where will the money be found to fund programs in a more competitive and commercial marketplace? How, asked Styles, will Channel 5, another national channel to be authorized for Britain during the '90s, be financed? What role, he wondered, could barter play in the process?

ASTA's George Back: *Not forcing the barter issue on Europeans—just explaining.*

On behalf of his U.S. colleagues, ASTA president George Back vowed to take up the challenge and help make barter work in Europe. Back compared the situation in Europe today with that which existed in the U.S. during the early '70s: An increase in the number of TV stations was accompanied by a decrease in government controls, and broadcasters were strapped for cash.

Back was quick to point out that the American contingent was not trying to force the American model on the Europeans: "We are here to simply explain how our attitudes have evolved and help develop a system that will work well in Europe."

The gatekeeper. Back maintained that barter did not allow advertisers to control the message, nor will it lead, he said, to wall-to-wall program-length commercials. Moreover, he noted "Barter is not about producing inexpensive programs for carrying a sponsor's message." The broadcaster, emphasized Back, is always the gatekeeper, not the advertiser.

These reassurances notwithstanding, Channel Four's Michael Grade lost little time in criticizing the barter system and was wary about its future in Britain. Although Grade was among those who shared the desire to find new sources of revenue in a less regulated British television environment and, in fact said he believed there was a place for advertiser support, he reiterated his often expressed fear that barter could open the door for advertisers to exert too much editorial to exert too much editorial control over the program.

In response to Back's comment, that ad agencies occasionally screen program pilots, Grade declared that any form of advertiser approval remains insidious. Grade also believed it was wholly wrong to adjust programming content to satisfy marketing requirements, adding that to do so would decrease program quality and diversity as well as risk innovation. Moreover, declared Grade, equally taboo was the presence of any furtive or surreptitious product placement.

P&G on defense. For the advertisers, James Connell, Procter & Gamble marketing services manager defended P&G's reputation, declaring that the organization had never had any intent of taking over the airwaves with programs cluttered with product inclusion or endorsements, adding, that, although the company currently produced more than 780 hours of shows each year, "You'll never see any P&G product discussed, used or even sitting on a countertop."

Irwin Gottlieb, senior vice president and director of national broadcasting for D'Arcy Masius Benton & Bowles, was another defender, echoing Connell's comments. "Barter," he stated, "is simply a business mechanism. If we tamper with the medium, we may damage the medium; the advertiser makes no attempt at controlling the editorial content; that is the area of the broadcaster."

Scenario for barter in Europe outlined by Thames program director

While no one specifically asked him, one might reasonably presume that Thames Television (U.K.) program director David Epstein is somewhat less than convinced that barter will become commonplace in Europe in the foreseeable future.

This probably is true despite the fact that, as opposed to a number of his colleagues attending the Advertiser Supported TV London conference, Epstein could be seen to be, not only more sympathetic to the idea, but also cautiously optimistic about its longterm chances of success.

Epstein sees barter solving scheduling problems.

In a speech outlining a plausible scenario under which market conditions could prompt the need for programmers to eventually turn to a kind of barter in the American tradition, as one means of solving their scheduling problem, Epstein also cautioned there were reasons why barter could easily be inhibited from expanding into Europe on any meaningful basis.

More channels. In practical terms, Epstein's assessment of conditions which will occur in the U.K. in 1993 coincides with the four or five years from now when most prognositcators believe there will be enough channels broadcasting in Europe to make barter a viable alternative to cash purchases. In that year, Britain's Channel Four, will become responsible for selling its own advertising time. Until then the regional Independent Television stations will continue to handle C4 sales, as they have been doing since C4 was originally launched.

Epstein believes that C4 most likely will sell its airtime on a national basis. This, he argues, could undermine airtime sales in certain ITV regions with heavy viewing as some advertisers find they are able reach their national targets through C4. At the present time, with the exception of TV-am, the morning commercial franchise holder, advertisers must buy U.K. spots on a regional basis. Assuming his concern about the possible post-1992 attractiveness of C4 national sales is realized, Epstein believes that for the first time in the U.K. there might be a rationale for assigning some regional airtime to a national sales organization.

Government approval would be required. "In such circumstances," Epstein contends, "either of the current U.S. models might apply: 'unwired networks,' whereby sales agencies collate regional airtime so as to offer it to national advertisers, with daypart packaging, rather than specific programs or barter syndication."

While Epstein, thus offers some hope to those anxious to barter in Britain—regulations eventually permitting—he is even less sanguine about its European chances of success.

Obstacles. According to Epstein, there are several obstacles likely to inhibit the expansion of barter in Europe. "Beyond the U.K.," he points out, "it is hard to see in Europe a terrestrial broadcast marketplace which is sufficiently coherent in taste and language to make packaging of airtime viable, either through unwired networks or barter syndication."

Epstein contends that, if it is to develop at all, advertiser supported programming would have to advance through two separate avenues: sponsorship or placement. Sponsored programming, he notes is growing slowly in the U.K. and Europe. While, he notes, some advertisers see some benefit in their direct association with particular programs, he suggests progam placement offers advertisers the best opportunity for success in a Europe dominated by a fragmented television structure.

Program placement, says Epstein, allows the advertiser to choose in which territories to make cash sales and in which to barter. "The main potential for program placement must be the expected surge in available channels throughout Europe in the next five years," he predicts.

Along with most other people in the field, Epstein points out the unlikelihood of all the new stations being able to generate enough revenue, through advertising and/or subscriptions, to be able to maintain an acceptable level of programming output. "Placement," he concludes, "offers advertisers more attractions as a flexible route to broadcast objectives."

Nonetheless, at the same time, Epstein "simultaneously" reiterates his initial warning, that language and taste barriers may inhibit the drive toward the widespread acceptability of barter.

Canada, New Zealand coventure starts four series

South Pacific Pictures of New Zealand and Atlantis Films Ltd. of Canada have signed the first major multiproject coproduction pact under the Canada/New Zealand Official Coproduction Treaty.

The agreement, valued by John McRae, managing director of the New Zealand company, and Michael MacMillan, Atlantis president, at $10 million (New Zealand), involves four series under the *Family Drama Series* banner. Three of the series will be shot in New Zealand to qualify as coproductions under the treaty and will include Canadians in the cast and crew. These are *Raider of the South Seas*, set in World War II; *All for One*, a teen comedy; and *Star Runner*, an adventure series involving a racehorse.

The fourth series, titled *African Journey*, will be about a family living in Africa. It will be produced in Zimbabwe as a coproduction with Canada's The Filmworks, using crews from both Canada and New Zealand.

The series will be distributed jointly by Atlantis Releasing and Television New Zealand International. *All for One* is due to air in New Zealand in May, with the others due to wrap production by August.

World Series followed by baseball nostalgia

Much of the advertising for Crest toothpaste is in women's magazines, targeting mothers with advice on taking care of their children's teeth. But Crest is now returning to radio after a long absence, not necessarily to reach young mothers, though it will undoubtedly net at least some working mothers, too, but to reach a wider drivetime audience of 18–49 year old adults, with, of all things, baseball nostalgia.

D'Arcy, Masius, Benton & Bowles has placed Crest in *Baseball Memories*, a series of 60-second vignettes hosted by Hall of Famer Johnny Bench, in which baseball's greats recall their childhood dreams of making it to the big leagues. The continuing series, produced by Cincinnati-based Livy Morris Productions, premiered in August and airs nationally on Westwood One's NBC and Mutual radio networks.

Plans call for production of 120 to 200 new programs, scheduled to air during the 1990 baseball season. Among the players featured during this year's season were Mike Schmidt, Yogi Berra, Nolan Ryan, Gary Carter and Bob Gibson.

Still more baseball activity for the nostalgia-prone is on radio in Florida and in some markets outside Florida. That's a day and night doubleheader every Wednesday played by the new Senior Professional Baseball Assn.'s teams. Starting Nov. 1 the Florida Radio Network started producing and distributing an afternoon game and a night game to the 25 to 30 radio stations already cleared, with more expected to join the lineup as the season for the "over 35" former big league players progresses.

In several markets. John Chanin, FRN executive director of operations and marketing, reports that besides the Florida affiliates, the games are also being carried by stations in markets including New Orleans, Houston, Minneapolis-Saint Paul, Charleston and Youngstown, Ohio. Sponsors include AT&T and Chrysler.

Chanin says that with such managers and player-managers as Bobby Tolan, Graig Nettles, Dick Williams, Pat Dobson, Earl Weaver and Clete Blair, the senior league includes teams representing eight Florida cities, from Bradenton to West Palm Beach.

He also reports a good following: "These teams have players like Rollie Fingers, Vida Blue, Pete Falcone and Bert Campaneris. The Winter Haven team has a lot of ex Red Sox playing for it, so they have a strong following of retired Bostonians who live down here in Florida now. The other teams have similar situations. The fans are retired, so they have time to come to the ballpark. These teams draw attendance between 4,000 and 8,000 a game. Each team sells roughly 500 season tickets."

Chanin also promises that besides the 28 regular season games, FRN will carry the first Senior Professional Baseball Assn. All-Star Game and Championship at the end of the season in February.

On mike for the afternoon games will be Lou Palmer calling the play-by-play, teamed up with former major league pitcher Bill Denehy doing the color commentary. At the night games, the broadcast booth will be filled "with over 50 years of major league broadcast experience," with New York Mets' sportscaster Bob Murphy and Dave Van Horne, the voice of the Montreal Expos, calling the action.

CBN Radio show joins Armed Forces web

CBN Radio Network's *Heartline Across America* show has been acquired by the Armed Forces Radio & Television Service as its first religious program on the FM band.

Heartline, according to host Jerry Drummond, is an informal talk show that blends stories, interviews and contemporary music with "a Christian perspective." It will bow on AFRTS in February.


CBN's Jerry Drummond

Although AFRTS is designed for military personnel overseas in about 100 countries, the English-language service also reaches millions of other Americans abroad, AFRTS and CBN officials point out.

Radio entity interacts with television, too

Here's something from Westwood One that's interactive not only with listeners to affiliates of the company's Westwood One, Mutual, NBC Radio and The Source networks, but adaptable to television, too. Westwood One/Audiotex now provides interactive 900 phone number services for television's syndicated *RollerGames*.

Westwood One/Audiotex vice president Stuart Goldberg says that by calling 1-900-226-9000, *RollerGames* viewers can hear messages from *RollerGames* stars, take part in live promotions and contests, and offer their opinion in game polling and controversy. Viewers will also be able to order official *RollerGames* merchandise via what Goldberg describes as "our easy-to-use interactive menu of options available to anyone with a touch tone phone." Cost of a call is $1 per minute. He says the one-hour weekly series produced by World Alliance of RollerSports, Inc. in association with Sams/Miller Productions and Motown Productions, airs in 164 U.S. markets.

RollerGames executive producer David Sams says the interactive capability fulfills a promise made to stations that bought the series: "We told them there would be viewer participation. Now we're delivering."

More big-bucks station trades are going down

Viacom Broadcasting's agreement to acquire KOFY AM-FM San Francisco for $19.5 million from Pacific FM, Inc. follows some other recent station transactions involving even higher prices. Last month Beasley Broadcast group announced sale of oldies-formatted KRTH-AM in Los Angeles to Liberman Broadcasting Inc. for total consideration of $23 million, after buying both KRTH and its FM sister station from RKO General earlier this year for $86.6 million, which Beasely believes to be the largest sum ever paid for an AM-FM combination. Beasely is keeping KRTH-FM, along with its existing broadcast and studio facilities. Broker in the sale of the AM is Rumbaut & Associates.

Also pending FCC approval is the purchase of WMXB(FM) Richmond by Jerry Lyman's Radio Ventures, 1 from Ragan Henry National Radio Associates for $23.5 million, with Chapman Associates acting as broker in the transaction.

In San Francisco, Viacom Radio president Bill Figenshu sees the KOFY combination "having enormous growth potential in this fourth largest radio market." He adds that the acquisition, with H. B. LaRue Media acting as broker, "is consistent with Viacom's acquisition plans for the top 10 markets. We already own properties in New York, Chicago, Washington, Detroit and Houston."

James B. Thompson to head Group W Radio

James B. Thompson has left the general manager's desk at Group W's KYW-TV in Philadelphia to step into Dick Harris' former shoes as president of Group W Radio. Harris is now chairman of the radio group. But Thompson was tapped for the post only "after an extensive search within the broadcasting industry and our own company," according to Burton B. Staniar, chairman and CEO of Group W.

Thompson will be based in New York and will report to Harris, who adds, "We had an excellent group of candidates for this position, beginning with some of our veteran, senior staff members. We like Jim so much for the job because he is the person who will best complement the combination of management expertise we already have in place."

Thompson started his broadcast career with Group W at WJZ-TV Baltimore in 1971 as an account execu-

James B. Thompson

tive. He transferred to KYW-TV's sales staff in 1973, then left in 1978 to become president and owner/operator of Sel-Thom Communications, a broadcast group in Vineland, N.J.

He returned to KYW-TV in 1982 as national sales manager and was named general sales manager the following year. In 1984 he became vice president, sales and in 1985 was promoted to vice president, general manager.

Unistar moving news to Washington area

By spring 1990, Unistar Radio Networks plans to move its news center to "new, state-of-the-art headquarters and electronic news facilities" in Arlington, Va., close to the action in Washington, where so much national news originates. William Hogan, one of Unistar's three presidents under the network's new "office of the president" setup, says, "The decision to headquarter our news operation in the Washington area comes directly from the reality that the nation's capital is at the heart of national and international news."

Freberg in the morning and afternoon drive

Dick Brescia, former CBS Radio sales chief, who now heads his own DBA radio syndication company, notes that more stations are using humor these days to liven up their programming, so he's now offering daily commentary by one of radio's stellar creative humorists and commercial makers, Stan Freberg, for syndication starting in January.

Brescia describes what's coming as "Freberg unleashing his satiric wit during his two-minute commentaries on any and all subjects that strike his fancy, just as, say, Andy Rooney does on *60 Minutes*. Like Rooney, Stan looks at the world in sometimes surprising ways, to add some laughs to drivetime."

He says the commercial arrangement is that the stations will play each Freberg commentary twice: "The first play will carry our national minute—or two 30s. Then the station sells the commercial opening in its replay to its own local advertisers."

Radio Business Barometer

September spot was down 1.4%

After a pretty impressive eight months, the spot radio sales engine slid off the tracks in September. It was not a surprise. At least, it shouldn't have been. The earlier months of the third quarter had shown continued slippage following a really vigorous second quarter.

The spot dropoff in September, as detailed by Radio Expenditure Reports, was not very great. In fact, it was miniscule. But stations had been getting used to sizeable sales increases during the earlier part of the year, and even a slight drop feels uncomfortable.

Performances in September didn't vary greatly by the four market groups broken out by RER. The top 10 markets were the only ones showing an increase, but, like the overall decline, it was miniscule.

September's decline amounted to only 1.4%. August was up 3.7%, and July rose 9.2%, while the second quarter recorded a hefty 17.0% increase. This latter number reflected a 23.9% climb in April, after which spot radio could only go down in percentage increases—which it did. But the medium is still well ahead of last year through the first nine months.

Billings for September came to $87,133,500, compared to the previous year's $88,355,800. There have been three $100 million months so far this year, one of which (May) was a four-week Standard Broadcast Month (SBM), while the two others were five weeks. September was a four-week SBM.

The increase for the top 10 markets in September was a mere 1.2%, but, as noted, it was the only number among the market groups on the upside. Time sales for the top 10 markets during the month amounted to $33,644,200, vs. $33,247,200 in '88.

The smaller markets—51-plus—showed the biggest drop, which was minus 4.0%. It wasn't so long ago that the 51-plus markets were consistently ahead of the pack. Time sales totaled $20,757,400, as against $21,629,800 during September '88.

The next biggest drop was that of the 11th-to-25th market group. It was down 2.8%, dropping from $19,792,700 to $19,237,900. As for the 26th-to-50th markets, the drop came to 1.4%, with '88 billings being $13,686,100 and '89, $13,494,000.

The quarter ended up with a 4.0% increase. Billings totaled $284,816,300, as against $273,874,300 last year. The first quarter of '89 was up 8.0%, and the second, as noted, was up 17.0%.

Year-to-date $$

Year-to-date figures show almost a double-digit rise, despite the slowdown last summer. The increase was 9.8%, with nine-month time sales amounting to $793,933,200, compared with $723,263,300 the year before. It's worth noting that for the full year, spot radio in '88 was up 6.6%.

Year-to-date data for the market groups show a direct connection between size and performance, the bigger the markets, the better the performance. The top 10 were up 15.4%, the 11th-to-25th rose 9.9%, the 26th-to-50th climbed 5.7% and the 51-plus showed a 3.9% increase.

September

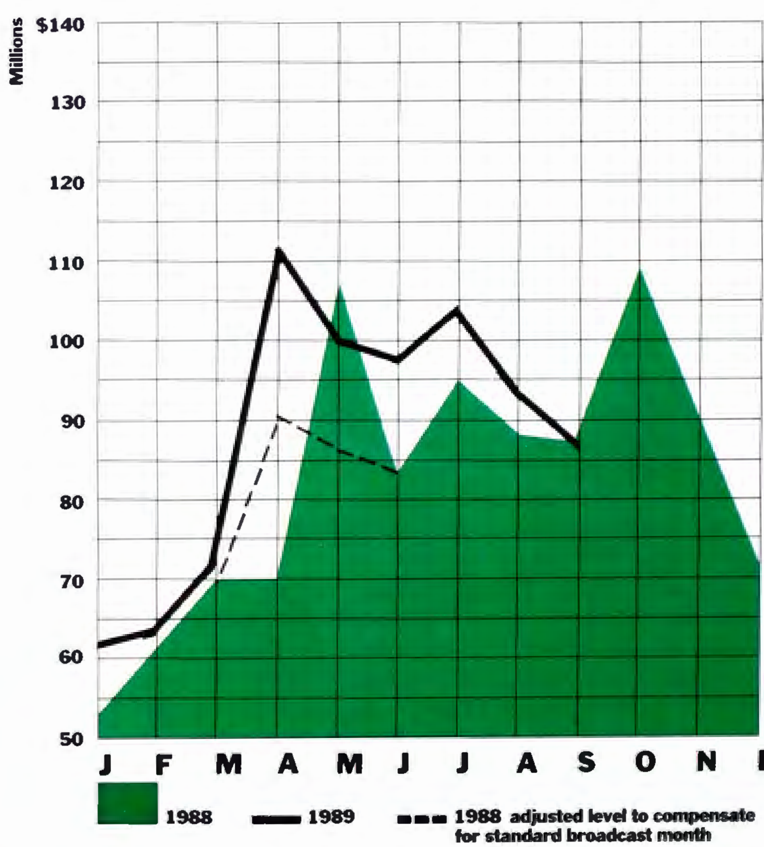
National spot **−1.4%**

(millions) **1989: $88.4** **1989: $87.1**
1988 adjusted: $88.4

Changes by market group

Market group	*Billings (mils.)*	*% chg. 89–88*
1–10	$33.6	+1.2%
11–25	19.2	−2.8
26–50	13.5	−1.4
51+	20.8	−4.0

Source: Radio Expenditure Reports



0 to 33 in just 4 months.

Talk about shifting gears. In a recent four month period, KCPQ-TV in Seattle/Tacoma roared from a 0 to 33 per cent share of annual advertising budget with a local Mazda dealership.

The reason for the sudden acceleration? TV Conquest from Nielsen Station Index, the first desktop program to merge marketing data and tv ratings into a dynamic, powerful sales tool.

KCPQ used TV Conquest's target ratings to demonstrate the local audience's current and potential purchase patterns. That did the job.

And if it hadn't, they could have driven home their points effectively with the system's four color charts and maps.

Your station can do the same to steer new advertisers in your direction.

For more information, call the information people at Nielsen Station Index, (212) 767-1515.

We'll help push your sales to a higher level of performance.

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Television/Radio Age

November 13, 1989

Broadcast factors include strong network sales, a sluggish economy

TV outlook for '90: It's not bad, but it's not great, either

By ALFRED J. JAFFE

The outlook for broadcast TV next year is clearly a mixed bag. Prognostications from the financial community, reps and agencies are variously hopeful, cautious, pessimistic and optimistic. Nobody sees a blockbuster advertising year. And the market for stations is not going to get any better, a reflection of the advertising picture.

The mixed signs include a strong network upfront market last summer, a somewhat sluggish national economy, many questions about retailing, a wary eye on Wall Street, some positive aspects about TV advertising, and a drop in cash flow multiples as a basis for setting station prices.

TV advertising expenditures, according to the consensus, will go up a little faster than inflation; in current dollars, the percentage increase will be in the middle to high single digits, not particularly satisfying, but not ominous, either.

The good news

First, the good news. Almost everyone agrees that the network picture, by itself, for the '89–90 season is bright, at least for primetime. It is well established by now that upfront primetime sales last summer were quite strong and that this carries a presumption at least of carryover into the first three quarters of next year.

Estimates put the upfront total at about $3.5 billion, with maybe 80–85% of the October–December inventory committed for sale. What is not established is to what extent clients will exercise their options to pull out of their network deals (They can cancel up to 50% of their buys in '90, depending on the quarter) and to what extent spot will benefit from a possible network overflow.

Carol Karasick, executive vice president and director of media operations at Saatchi & Saatchi Advertising, believes that the upfront business will stabilize the network revenue platform next year. Generally, she says, she doesn't see any extensive exercise of cancellation options in the offing.

A similar opinion from the spot sales side comes from Pete Goulazian, president of Katz Television. "I do think network sales will benefit us in '90." There are some contingencies, however. "My biggest concern is that we're too dependent on auto business. If auto sales go down, this could have a big im-

TV advertising expenditures, according to the consensus, will go up a little faster than inflation.

Estimates of TV advertising expenditures—1990

Percentage change over 1989

	Spot	Local	Network
TV Bureau of Advertising	+6%	+7%	+7%
Wilkofsky Gruen Assoc.*	+7.6%	+9.9%	7.9%
Salomon Bros.	+5%	+6.5%	+5%
First Boston Corp.	+5%	+5.8%	+7.6%

* *As reported in August '89 addendum to WG's "Television 1985," sponsored by Blair Television and Smith Barney Harris Upham and in the third annual "Communications Industry Forecast" by Veronis, Suhler Assoc.*

Gerald Hassell

pact." But he sees the possibility of high network scatter prices pushing package goods clients toward spot.

Arnold Semsky, executive vice president of media and program services at BBDO, says it's too early to tell about network cancellation options for upfront buys at this time. "It's a mid-January decision," he explains, talking about the second and third quarters of next year.

But Semsky is one of the more optimistic about '90 ad budgets. "We're looking at a good year," he comments. From an October vantage point, Semsky sees overall ad budgets up about 10 to 12%. That's before cuts and adjustments, he explains. The increase will probably end up to be more like 8 to 9%, says Semsky.

National spot could have a good year, Semsky believes. He relates this to more regional and local marketing. "That's because prices for national spot are going up more slowly than network."

Mixed signals

Not so sanguine about ad budgets and network TV next year is Richard Kostyra, executive vice president for U.S. media operations at J. Walter Thompson U.S.A. While he points out it's too early for definitive ad budget predictions, he finds considerably mixed signals. "There's more pessimism than optimism. There are signs of clients tightening ad budgets and some media cutbacks. And there are more requests by clients to determine their cancellation privileges [for network TV]."

There's a potential for a softer spot market next year because of a slow economy and tightened ad budgets, according to Kostyra. On top of that, he sees spot hobbled to some extent by cable and barter syndication offerings.

"There's just more fragmentation of media," he points out. He cites, for example, Whittle Communications' Channel One, which offers TV news to children in school, and a special magazine for beauty parlors. These developments affect all media, Kostyra notes.

Specific estimates of the growth rate of TV broadcast revenues next year by broadcasters and financial analysts are not too far apart. A little higher than most are those coming from Wilkofsky Gruen Associates, which appear in their August '89 addendum to their *Television 1995* report, sponsored by Blair Television and Smith Barney Harris Upham & Co. and which also appear in the third annual *Communications Industry Forecast* by Veronis, Suhler & Associates.

Sales estimates compared

WG's estimates are for a 7.6% increase in spot, a 9.9% rise in local and a 7.9% climb for the networks. The Television Bureau of Advertising posts the following increases, agreed on by the board in September, before the October 13 stock market slide: spot, 6%; local, 7%; network, 7%.

Edward Atorino, vice president and broadcast analyst at Salomon Bros., offers these figures, all increases: spot, 5%; local, 6.5%; network, 5%.

Another financial analyst, Jessica Reif, vice president at First Boston Corp., sticks to the figures she estimated last summer when she was at CL Global Partners: spot, 5%; local, 5.8%; network, 7.6%; barter syndication, 12.8%.

Many assumptions go into the forecasts. James Joyella, newly-

Edward Atorino

Richard Kostyra

named president of TvB, explains that one of them is that there will be no recession in '90. Another is that consumer confidence will remain high, as determined by the Conference Board.

But some other factors are clouded by uncertainty, Joyella notes. While he feels the stock market mini-crash last month has had no effect so far, he points out that Wall Street is split as to the meaning of the drop and the potential for repetition. "No one has a crystal ball that works." He also finds the future retail direction hard to nail down. "Retail crown jewels are up for sale; Altmans and Macys have posted losses." And he's nervous about the auto business. "Auto business has been good through the year but profits are down in the third quarter. Autos are selling but at discounted prices."

One promising piece of the '90 picture is political advertising, says Joyella. He estimates the total at $180 to $200 million, all spot and local billings for stations.

Atorino points out that the current consensus among economists is that will be no recession next year. He looks for an increase in "real" Gross National Product of about 1.5% (4–4.5%, including inflation). He sees corporate profits at 4.5% of revenues, down from an estimated 9.0% this year. But he feels that station business in the Southwest—the oil patch—will recover somewhat in '90. Autos? "You can't count on a big auto push." Audience erosion on the networks? It will be slow but steady.

A generally negative viewpoint is uttered by another financial analyst, Dennis McAlpine, senior vice president at Oppenheimer. He starts off by saying that the networks have had a "strong begin-

Arnold Semsky

ning" this season with not much likely in the form of makegoods. But he sees a continuing decline in audience share and questions whether auto maker expenditures, which have been a "driving force" for the networks, will continue at their earlier level.

Downside factors

As for the economy, the appearances for a "soft landing" may be misleading, the Oppenheimer executive believes. "Can we get a soft landing? Some people say we're in a recession now," he remarks, though he quickly points out that the economy doesn't fit the official definition of a recession, which calls for two consecutive quarters in which GNP is down. Among the downside factors cited by McAlpine is a poor recent showing by retailers, with consumer electronic dealers in particular exhibiting poor performance.

Robert Coen, senior vice president of McCann-Erickson, the ad industry's "official forecaster," hasn't got his '90 ducks in a row yet, but says that a slowdown should be expected. "We've been in a long expansion since 1983, and we're now running out of steam." If the economy is having a soft landing now, then next year will be better, says Coen, but he points out that most economic forecasts indicate that '90 will be weaker than '89.

In any case, Coen notes that the retail area has been "depressed" for three to four years and that this has slowed local TV growth. "Local TV was up 6% last year when the economy was up 7%."

The uncertainty underlying economic and advertising forecasts is having its effect on the marketplace for TV stations, of course. According to Gerald Hassell, senior vice president at the Bank of New York and head of the bank's communications, entertainment and publishing division, the current environment for sellers is not as good as it was.

Station prices are usually calculated as a multiple of cash flow, and this continues to decline, says Hassell. The current bid-ask range is around nine to 12 times cash flow, he says, and most of the deals Hassell has seen recently are in the neighborhood of 10 times.

Unfulfilled expectations

"The ad revenue growth just isn't there," says Hassell. Speaking of George Gillett, the principal owner of SCI Television, now undergoing a financial restructuring, the banker comments, "He didn't run his stations poorly, but he overpaid and over-financed the stations on the expectation of increased advertising—which didn't develop."

A secondary factor in the depressed station marketplace is the junk bond situation, Hassell points out. Leveraged buyouts using high-interest debt are harder to pull off because of the current "skittishness" of the junk bond market, he says.

As for the economy in general, the banker sees an increase in GNP next year of 1.5 to 2%, after inflation. "We're in a soft landing."

From the investment banking community comes the comment of William Suter, managing director, Charterhouse Media Group and a former Merrill Lynch broadcast analyst, that 1990 will be a "good year" for the TV broadcast industry. "The network sellout is a good sign," he says, "and the scatter market has been strong." But he acknowledges that "the broadcast business is not as robust as it was five years ago."

Pete Goulazian

Bill Breda

As for sales of TV stations, Suter agrees that sellers, "are not getting the old multiples." Nine to 10 times cash flow is typical currently, he finds, but he predicts that sales of stations will increase next year. However, he notes that station sales are not as numerous currently as they were earlier this year.

Many of the comments and predictions about next year include the caveat that it may be too early to tell what will happen. One of those holding that view is Bill Breda, senior vice president and general sales manager of Blair Television. However, Breda felt that the fourth quarter '89 situation looked positive as of late October. Spot, he believes, could be up 5–6%, a figure which does not make him unhappy. He is more optimistic about future auto advertising than most sources interviewed and points out that the new Japanese luxury cars, the Lexus and Infiniti, must be factored into the advertising picture. He also expects a "good political year" in '90 and says it's possible spot could be up 7% as a result. And he is optimistic about package goods clients, who, he says, while not as big in spot as in the past, seem to be coming back to the medium.

One of the factors that could affect TV advertising next year is what clients budget for retail promotion. Agencies as well as broadcasters have been concerned for some time that the rising expenditures in the past for retail promotion have been at the expense of brand-building media advertising.

Katz's Goulazian sees signs that the pendulum may have started to swing the other way, although his perception is not supported by other agency executives contacted by TV/RADIO AGE. □

Early fringe a buyer's market

Marketplace flooded with off-network sitcoms

By ROBERT SOBEL

Station buyers going to the 1990 NATPE convention and looking for strips which can play in early fringe are probably in the best buying position they have been in in several years.

The syndication marketplace is overflowing with off-network sitcom offerings, with some possibly still to be fetched for bargained-down dollars, and there's a glut of first-run product, especially in the game-show genre, plus a load of talk, tabloid and infotainment series, to be had as well. But perhaps most important is that many of the present new off-network shows currently airing are performing below expectations—at least in terms of the dollar outlay by stations. But this too, ironically, has its own rewards—creating a soft marketplace for the syndicator sellers.

Off-web sitcom glut

However, let the buyer beware. Some tabloids are on the advertiser "hit list"; off-network sitcoms may be overbought and overstocked; and, non-*Oprah Winfrey Show* stations may find buying against the series an exercise in futility.

For next season, there is an abundance of off-network sitcoms being offered, and it's probable that indie stations will be turning more heavily to airing them in blocks in early fringe. Programs are Columbia Television's *227;* Warner Bros.' *ALF*, *Head of the Class*, *The Hogan Family* and *Perfect Strangers; Golden Girls*, from Buena Vista; *Amen* via MCA TV; and from Qintex Entertainment, *Dennis the Menace*. Its *New Leave it to Beaver* is available beginning with the 1992 season.

Jim Curtin, assistant director of program services at Harrington, Righter and Parsons, believes there will be many more sitcom blocks in early fringe next year than there are at this point. However, the success of the sitcoms will be limited, he points out. "They will be limited in just the time period they are running. We don't expect to see a big halo effect, except in the case of a few of the more older-skewing sitcoms coming on line, such as *Golden Girls*, which may have some potential to help a newscast because it has some older adult appeal. On the other hand an *ALF*, which tends to draw kids and men readily, might be better off away from the newscast, because women are needed at that point."

All in all, it will be interesting to see how the new sitcoms will do next year, the reps says collectively. But they add that both *Who's the Boss?* and *Growing Pains*, two strong network sitcoms, are not yet dominating their time periods in most markets and should give stations some pause to be concerned. This is especially true when considering that sitcoms such as *Head of the Class* and *Perfect Strangers* are not faring as well as *Boss* and *Pains* in primetime on the networks, notes HRP's Curtin. "*Golden Girls*, on the other hand, is performing as strong as *Boss* in terms of share, so it will be interesting to see how that does in syndication," Curtin says.

Girls is offered for triggering by stations either for 1990 or 1991. Buena Vista has been "very aggressive" in its pricing policy on *Girls*, says Curtin. "The question will come down to whether Buena Vista will be more flexible in the first two quarters of 1990 or stay tight on their pricing policy, when they try to get stations to renew for 1991 because they believe in the show."

At this point, Buena Vista has cleared a "good number of markets," continues Curtin, but they are not at saturation "because they quite rightly are pricing it high and holding onto it."

Disappointed stations

The current assessment on *Who's the Boss?* and *Growing Pains* is that while both shows are performing adequately, at least as results show in the metered markets, many stations are disappointed.

John von Soosten, vice presi-

"Head of the Class"

dent, programming, Katz Television Group, asserts, "The off-network performance results of the late '80s are not where they were in the early '80s. You are not seeing the kind of numbers that you have seen with *M*A*S*H*, *Three's Company* and *The Jeffersons*," which all had very strong numbers when they premiered. In many situations, independents that ran them against affiliate news or access frequently were the No. 1 station in the market or were very competitive."

John Rohr, vice president, associate director of programming at Blair Television, says that stations are generally disappointed in the performance of *Boss*, in relation to what stations paid for it and in terms of its "halo" affect as a news lead-in. "We saw last year that *The Cosby Show* also didn't have a significant halo as far as news was concerned. So this season stations weren't looking at the halo aspect but that it would do a good number as a show in of itself. But *Boss*, too, hasn't lived up to its expectations at this point, although we only have the metered markets to look at."

On the other hand, *Growing Pains* was priced significantly less and wasn't picked up to be used in a critical time period such as being a news lead-in, according to Rohr, "so it is performing probably as expected."

In the case of *Boss*, points out von Soosten, the high price paid is a factor in determining whether the money is being well spent. "If the show was priced lower than it is, stations would believe they are getting their money's worth. But in a case where a show is sold at a fairly significant dollar figure and the performance has been good but not outstanding in most situations, there has to be some concern, not only about *Boss* but about off-network sitcoms in general.

But, on the other side of the coin, he continues, "If you don't pay it, what do you have left? You may be doing less well if you put something else in." But, emphasizes von Soosten, shows such as *Boss* are "good television shows," and stations with *Boss* and *Pains* had very reasonable expectations that the shows would do well. We certainly thought they would do well."

It's too early to really get a fix on the sitcoms' performance, and with daylight savings time just ending, von Soosten says, off-network shows will be performing better. "Viewing habits will change somewhat because of the change of season."

Von Soosten notes, however, that *Boss* is fetching exceptionally strong numbers on at least two indies, KMSP-TV Minneapolis and KTVU-TV San Francisco. At KMSP, Stuart Swartz, general manager, station manager, confirms that *Boss*, which airs at 5 p.m., followed by *Family Ties*, *M*A*S*H* and *Night Court*, is paying off, despite the high license fee. "It's an expensive show for the time period, but its numbers are going quite well for us," says Swartz.

Soft for syndicators

Also, *Cheers* and *Night Court*, which entered the syndication marketplace a season or so back, are holding up and are doing better than the crop of newer sitcoms started this fall, according to Rohr at Blair. "They are both more adult-oriented sitcoms than the more family-type of sitcoms, and I think that what has happened with the others is that they have created a soft marketplace. Also, the soft marketplace has come from the seeming glut of the newer family-type product available for next season."

At Katz, von Soosten says that syndicators have not had an easy time in selling shows. "It's been very competitive and very rough on the syndicators for a couple of reasons. The numbers have been soft in terms of performance, and there are a lot of available off-network sitcoms and a lot of available first-run shows. Stations at this point have a lot to choose from."

And Swartz at KMSP says that because a large number of sitcoms are being offered, stations are in the driver's seat. "Stations can afford to be much more selective, and we are seeing a major decline in prices—not the asking prices, but the real prices. What's happening is that the network affiliates are finding that the sitcoms are not a good lead-in to the news, so there's less demand on their part, whereas they work well on independents as counterprogramming to *Oprah* and others."

For next year, KMSP has purchased only *Head of the Class*, which will probably run along with *Growing Pains*, delayed this season by the station, according to Swartz. Swartz, too, notes the station has an abundance of sitcoms, such as *Facts of Life*, *Webster* and *Little House on the Prairie*, which have runs still to be used up and which may run in the first quarter of 1990.

Golden Girls was the only off-network series bought for next season by WISN-TV, ABC affiliate in Milwaukee, because of lack of room, according to Dean Maytag, program director. And tentative plans call for the sitcoms to run in

"A Question of Scruples"

"Not For Men Only"

the late fringe. "In the central time zone, it's a very good late-fringe product," he says, "although our secondary consideration will be early fringe. But in our case, we don't have a 5 p.m. news. We have a 6 p.m. news, preceded by the ABC news program, so we don't have a direct early-news adjacency for sitcoms."

WISN runs *The Cosby Show* at 4 p.m., followed by *M*A*S*H*, and *Who's the Boss?* at 5 p.m. *Boss* also airs at 10:30, then *Hard Copy*. The *Boss* double-run is coming along "pretty good," says Maytag.

KBVO-TV Austin, indie/Fox station, apparently not discouraged by some of the current sitcom numbers, has acquired several of the new off-network sitcoms, including *ALF*, *Head of the Class* and *Perfect Strangers*, and expects to trigger *ALF* and *Class* next season. *Strangers*, according to Steve Beard, general manager/program manager, will probably go on the air the following season.

Transition area

Beard, who says the station is running *Boss* at 6 p.m., followed by *Night Court*, with some of the older sitcoms, such as *Happy Days Again* and *Webster* before that, acquired the new series "at good prices, because we are the only indie in town. Also, we have been in depression. At this time I'm running *Days* and the other shows to get my runs out of them. Also, the 4–5 o'clock period is a transition area, and it's not exactly a barn-burning area for anybody."

Beard continues that at this time station slots for the new purchases have not yet been determined for 1990. "We are in a transition period of trying to determine where we are going to go. Our needs aren't the same since we became a Fox station. Also, we bought heavy on movies at the last NATPE."

Also creating a tight sitcom environment on KBVO's schedule is that renewals are coming into the market for *M*A*S*H*, *Barney Miller* and *The Jeffersons*, affording the station "a tremendous opportunity to buy these shows," says Beard.

Meanwhile, there are a glut of game shows in development for possible fall 1990 airing, including several revivals of shows that have been around at one time or another, such as Orion Television's *Name That Tune; Joker's Wild*, from Orbis Communications; *Quiz Kids Challenge*, from Barris Entertainment; LBS Communications' *Concentration;* and *You Bet Your Life*, via Warner Bros. Television. Originals include WB's *Trump Card* and *The Challengers*, from Buena Vista, although these and the other game shows are looking primarily for access.

Rohr at Blair sees stations that don't have *Oprah* or *Geraldo* as looking to build a game-show block in early fringe. "*Family Feud* is in that block now" says Rohr. "And *Third Degree* is blocked with *Feud* in some instances on affiliates, although *Third Degree* hasn't performed as well as *Feud* in those block situations. And with *Trump Card* coming out, especially, I wonder whether *Third Degree* will get renewed for next season."

At the most, Rohr believes there will be room for three game shows next season, perhaps for *Name That Tune*, *Joker's Wild* and ITC Entertainment's *Tic Tac Dough*, "plus one or two from the larger syndicators which have a lot of leverage."

Varied formats

In addition to the large cluster of game shows to be found at NATPE, there are, obviously, other types of shows in development that will be pushed for an early-fringe and/or morning slot. Among these are *House Party*, from Buena Vista; *Open House*, from Group W, produced by NBCTP, set for a January 1990 start on Group W and NBC-owned stations, with a fall 1989 national rollout; Worldvision Enterprises' *A Question of Scruples;* Also, there are *People's Exchange*, from MGM/UA, whereby people trade items, and GTG's *Love Thy Neighbor*, which resolves neighbors' disputes in a courtroom setting.

Other entries include MCA TV's *Talk Show With Christina Ferrare*, former host of KABC AM station in Los Angeles; *The Jane Fonda Show*, from King World, featuring Fonda on an occasional basis; *The Kelly & Gail Show* from Tribune Entertainment; and *Not for Men Only* and *SuperBoy*, Viacom Enterprises. In the magazine format, in development for a fall 1990 launch are *30 Minutes* from King World; *Celebrity Update*, GTG; and *Women's Day*, Tribune.

Just how many new reality or tabloid style shows get launched next season will depend largely on the performances of the current breed of tabloid fare running in early fringe, believes Rohr at Blair. "People started *A Current Affair* in early fringe; then when it became successful, it was bounced up to access. And a lot of those early-fringe time periods are being filled with *Hard Copy* and *Inside Edition* and, possibly, even with *Crimewatch Tonight*. If any or all fail this season, the new programs could fill the early-fringe time periods left vacant."

But, continues Rohr, there has been some "positive growth" with *Inside Edition* in May and July, and *Hard Copy*, although not burning up the airwaves, is having a slow build. "*A Current Affair* was also a slow build, so it may take more than one or two books for stations to determine whether the other two shows need to be replaced," he says.

But while the ratings will be watched, the "hit list" problems experienced by *A Current Affair* as well as *Donahue* and *Geraldo*, will also be scrutinized carefully by stations, says HRP's Curtin.

"While these shows may do well in ratings, the net effect on sales will not be there," according to Curtin, "so I think we have to look for both elements. And we may find, much like Morton Downey, Jr., some shakeout may come down in the tabloid and exploitive area." If that's the case, he continues, it would free up a lot of fringe time.

Hit list effects

Oprah has not yet had any hit list problems. But even it it did, it is felt that it would have little impact on the show. On the other hand, a show such as *Geraldo* could be hurt by any large advertiser pullout because its numbers are not even close to *Oprah's*. If *Geraldo* does suffer from an ad shortage because of the hit list, it may be in danger for next season, with stations looking for other options, it's believed.

But at WAGA-TV Atlanta, CBS Affiliate, two tabloids, *Inside Story* and *A Current Affair*, are feeling no advertiser pain, according to Leslie Glenn, program and research manager. "If a program is No. 1 or close to the top in the time period, advertisers tend to overlook" what might be considered objectionable material. "My salespeople have not been telling me that they've had a difficult time selling the programs. There may be some clients not buying them, but there are also clients that won't buy *Family Feud*."

By using the two tabloids from 4–5 p.m., WAGA apparently has found a way to beat *Oprah* or is coming close to doing so. *Inside Edition*, picked up in January, has averaged an 11 rating, 26 share at 4 p.m. beating *Oprah*'s 10/25 in the July Arbitron. *Affair* did an 11/26 at 4:30. *Affair* and *Edition* wound up with 7s in women, about the same as *Oprah*, says Glenn, but the numbers reflect several *Oprah* repeats. In the October books, the performance of *Oprah* and the other two shows were close, Glenn notes. Also, "what is great is the growth for us year to year. Last year, we had *Sally Jessy Raphael* and *Current Affair*. Now we are up 3 rating points at 4 o'clock and 2 at 4:30."

Just how sensitive the hit list has become in the industry is indicated by the fact that several syndicators are calling their new projects "advertiser friendly" in ads promoting the shows. For example, Buena Vista is heralding its upcoming fall 1990 game show, *The Challengers*, as having an advertiser friendly environment. Blair's Rohr sees "advertiser friendly" as being this coming season's catchword: "I expect to see all the new shows coming out for next year being tagged as advertiser friendly."

Soaps still a factor

Oprah continues to be the heavy target in early fringe for stations, where the show is averaging a 40–50 share in women, 25–54 in most markets. And besides a successful tabloid story here or there, the only other genre that is denting *Oprah* appears to be soap operas. Notes Curtin at HRP, "The story of early fringe starts and ends with *Oprah*, although soaps are seeing some success."

In St. Louis, for example, *Oprah* switched stations and wound up behind soap operas in both cases. Originally on CBS affiliate KMOV-TV, *Oprah* lost out to KSDK-TV's *Days of Our Lives*, in the 3 p.m. slot. *Oprah* now is being beaten by KMOV's *The Young and the Restless*. It's pointed out that *Oprah* is trailing soaps in other cases in the midwest as well.

But the difficulty in delaying soaps to early fringe is the loss in inventory. HRP's Curtin says, "You might be more competitive against *Oprah*—especially in the eastern time zone—but you're losing spot money because of the network commercials in the soap.

On the other hand, a syndicated soap may make more sense, he adds. "Probably some inventory would be lost to barter, but at least you might have a chance against *Oprah*." At this time, a few soaps may be surfacing for syndication, possibly to be used in early fringe. These consist of teenage soap projects, which could be used to attract young demos. One is *Glory Days*, and Claster Television is said to be talking to indies and networks to explore interest. If it flies, the strategy would be twofold: Undercutting *Oprah*'s young-demo strength, and indies could use the soap as a feed-off from kids' programming. □

Pat Finn of "The Joker's Wild"

CBS tries all-comedy Monday; NBC mulls similar thematic tactic

TV nets see merit in theme nights, program blocks

By JAMES P. FORKAN

The TV networks in their battle for viewers this season seem increasingly taken with the strategies of programming blocks and theme nights. In most cases, those approaches consist of two-hour comedy or action/adventure blocks. In others, they offer programming skewed to a certain demographic segment.

CBS, pleased with the results of a trial run late last season, has made the most daring move by sticking this fall with an all-comedy Monday night. Most of that evening's sitcoms, moreover, have a female slant, thereby serving as a fall alternative to ABC's male-oriented Monday roster.

A month into the new fall season, ABC is winning Monday, Tuesday, Wednesday and Friday—all of which feature targeted program blocks. NBC dominates Thursday and Saturday, both comedy-driven, and CBS takes Sunday, fueled by its clout with older adults.

NBC, already emphasizing comedy on most of Thursday, Saturday and, so far this fall, half of Sunday as well, has been considering an all-comedy Saturday lineup, although most agency execs now doubt that will occur. The peacock network currently is concentrating on an all-action/adventure Friday lineup, geared for young men. Most of its Tuesday slate, meanwhile, is aimed at older adults as an alternative to ABC's youthful comedy block. ABC, besides its perennially male-oriented Monday, anchored by *Monday Night Football*, now is try to carve out a male niche on Thursdays as well.

The strategy of building blocks is important to ratings and audience flow, but when it comes to buying commercial time, Paul Schulman, president, Paul Schulman Co., maintains, "Program blocks don't really matter. Agencies buy individual shows and their audience profiles. They don't buy comedy blocks." Tom Winner, executive vice president, media director, Campbell-Mithun-Esty, agrees. Theme nights and program blocks are "programming strategies, pure and simple," he says. "We buy rating points and demographics. We don't care how it's packaged on the air."

NBC's "Night of 1,000 Laughs" included "ALF"

. . . and "The Cosby Show"

Label it daring

Agency execs agree that CBS' all-comedy tack is daring. Saatchi & Saatchi's fall season analysis calls the running of all its comedies on a single night an "unusual strategy." Ogilvy & Mather labels it a maneuver "very seldom seen."

The move was dictated by necessity, as CBS execs have pointed out. As Kim LeMasters, CBS Entertainment president, explained last summer, given CBS' "mortality rate of putting on comedies at 8 o'clock," the Monday theme night would "allow us to nurture some that will be able to move into new time periods and not be unknown commodities." CBS, already heavy with Monday comedies, had only to move away from dramas in the 10 to 11 p.m.(ET) span. "The hardest thing in television today [is]. . . how do you get sampled?" he said at the time. "I think we put some good comedies on the air that just have not been seen."

It is admittedly "a formidable task" to start a new comedy like *Major Dad* against an entrenched hit like NBC's *ALF*, LeMasters admits, but *Live-in* last summer demonstrated that CBS could generate a 20 Nielsen share in the leadoff Monday spot. *Major Dad*, he theorized, would have the added plus of a known star, *Simon & Simon*'s Gerald McRaney, and significant promotion.

Besides the K mart promo tie-in, *Major Dad* gained visibility with a Sunday preview special in September, hosted by *Murder, She Wrote*'s

Angela Lansbury. That hour, including the full *Major Dad* pilot, posted a 25 share, and the series went on to beat *ALF* for three straight Mondays. In September, David Poltrack, senior vice president, planning and research at CBS, saw *Major Dad* as "a major step in correcting the CBS 8 o'clock problem," while admitting "maybe we have a compatibility problem" with the youthful *Famous Teddy Z* leading into the femme-appeal *Designing Women.* However, *Dad* too has since fallen, from a peak 26 share in premiere week to a 21 in Week 5, slipping behind *ALF*, which has held steady at a 23.

Winner feels CBS' Monday strategy is "not working. But it's not because it's a theme night. Some of the shows are weak, and people tune out." He dubs *Teddy Z* "a disappointment, not as good as it first appeared. But [the strategy] could work. They need strong shows." Since the chance of having six strong sitcoms are "slim," he suggests, "It's better to have an action hour at 10. I know that sounds traditional, but it allows you to program your four strongest shows 8 to 10 and then go with an action show at 10 for [that time slot's] more mature audience."

NBC 'did it first'

Werner Michel, Bozell's senior vice president, TV programming, concurs that CBS' Monday strategy "ain't doing so well. Having a theme night is fine. You just need the programs. They used to call it 'audience flow.' " He adds, "You either work everything against 9 o'clock—but you need strong shows to hold up both sides—or have everything radiate from 8 o'clock." The 9 p.m. anchor concept is being used well by NBC on Saturday, he says, adding, "CBS has a potential winner in *Murphy Brown*, but the shows before it aren't strong enough and those after it are getting older." NBC's Thursday *Cosby Show* "halo effect" is the best illustration of the 8 p.m. tactic, he notes.

CBS—which in May promoted its all-comedy experiment to viewers with such lines as "Monday night is just for laughs"—now promotes the lineup as the "Monday Night Comedy Club." In early October, LeMasters yanked *The People Next Door* as the fall season's first ratings war casualty and has altered the Monday comedy mix as of Nov. 13, when *Major Dad* will be followed at 8:30 by *Teddy Z* and *Murphy Brown* will flow into *Designing Women*, *Newhart* and *Doctor, Doctor*—the latter returning after what CBS describes as "a successful summer run" at 10:30 p.m.

The overall 8 p.m. weakness has plagued CBS for more than five seasons, but Poltrack says that "the domino effect will be phenomenal if CBS can boost 8 to 9 o'clock. . . We don't have the 'incubator' spots" that can draw young viewers, fuel promotion and bolster leadouts the way ABC and NBC have done. "If you get one of those shows—and they're very elusive," he adds, "it'll turn things around," as *The Cosby Show* and *Golden Girls* did for NBC's Thursday and Saturday slates.

Of the all-comedy theme night concept, Brandon Tartikoff, NBC Entertainment president, boasts, "We did it first," albeit as a one-shot ploy against CBS' *Lonesome Dove* in February.

He has been studying the prospects for such a comedic night and asking himself, "One day, should Saturday night be all-comedy? Should it be six comedies [like CBS' Monday]? Or should it be four comedies, followed by an hour comedy?" That would mean shifting *Hunter*, a Saturday action hit, to another night, a move that agency execs like Schulman and Winner doubt. "*Hunter*'s the perfect example of the [wiser] strategy I'm talking about," says Winner. Schulman feels a *Hunter* move "might be a mistake, given *Hunter*'s numbers—even beating the World Series [on Oct. 14]."

Pros and cons

Bozell's Michel adds, "I can't imagine [Tartikoff] would do that" on Saturday. "NBC is going to be very careful about experimenting, much more careful than they were this year. NBC is showing signs of getting old. They'll leave their successes alone and address themselves to [fixing] Wednesday and

Monday Night Funnies

CBS' all-comedy Monday lineup has had mixed results in the first six weeks of the season, through Oct. 29, 1989:

Program	Nielsen rating/share
Major Dad	14.8/23
The People Next Door	12.2/19
Murphy Brown	15.2/23
The Famous Teddy Z	13.5/20
Designing Women	14.2/22
Newhart	12.0/21

CBS first tested the all-comedy concept last winter. The Nielsens for the week ending March 26, 1989:

Live-in	12.6/20
Heartland	12.4/19
Murphy Brown	14.6/22
Designing Women	15.1/22
Newhart	13.6/21
Kate & Allie	11.9/20

NBC tried an all-comedy Monday versus CBS' "Lonesome Dove" the week ending Feb. 12, 1989:

The Cosby Show	25.6/37
ALF	22.8/32
Golden Girls	21.8/30
Empty Nest	18.9/26
Cheers	17.3/25
Night Court (R)	15.7/24

NBC also experimented with an all-comedy Saturday night. The results for the week ending Aug. 13, 1989:

Amen (R)	7.5/17
113 East	9.0/19
Golden Girls (R)	14.5/30
Empty Nest (R)	13.9/28
227 (R)	12.4/25
Oh, Henry	10.4/22

CBS' "Monday Night Comedy Club": "The Famous Teddy Z"

"Major Dad"

Friday."

In addition, an on-air NBC test last August found that two sitcoms in the 10 to 11 p.m. Saturday span performed lower than *Hunter* reruns and that a one-shot of *Hunter* on a Sunday was no match for CBS' *Murder, She Wrote*, agency sources recall.

Tartikoff also has long dreamt of going all-series on Sunday or Monday, eliminating one movie package—if he had "the horses," meaning sufficiently strong series. One of these nights thus might also lend itself to a comedy theme, some sources speculate. However, when NBC aired its six-comedy "Night of 1,000 Laughs" against *Dove* in February, *Cheers* and *Night Court* could only muster Nielsens in the so-so 24-to-25-share range in that closing Monday hour.

In explaining why he would even consider an all-comedy Saturday, Tartikoff observes, "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. And 10 o'clock is starting to look more and more viable, a time period when rarely networks have ventured with half-hours." There is a reason for not doing so, as he points out. "The problem is really with the second half-hour because [for] affiliates, there's usually drop-off between a first half-hour and a second half-hour. And affiliates like dramas leading into their late news because the second half-hour [of a drama] is usually higher than the first."

Some sour notes

As for ABC, that network "now has comedy blocks every night except Monday and Thursday," says Saatchi & Saatchi, and on the latter two nights, ABC opts instead for the male audience. ABC Entertainment president Robert Iger sees those comedy blocks as appealing heavily to women 18 to 49, and that audience flow in turn benefits the female-skewed *thirtysomething* and *China Beach* at 10 p.m. Its Friday sitcom block was one of ABC's brightest spots last season, when it topped CBS' serial block for the first time in a decade. The network currently is promoting its Friday lineup as "TGIF—thank goodness it's funny."

Wednesday is "a real puzzlement," according to Schulman, who says ABC's comedies "looked terrific" until NBC's *Night Court* upset *Doogie Howser, M.D.*, on Oct. 18 and tied it the following week. "People are still sampling and switching," he cautions. N W Ayer's fall analysis had questioned the wisdom of *Anything But Love* leading into *Doogie Howser*, and Iger in early October decided to flip-flop the two, allowing *Doogie* to pick up on the leadoff hour's youth-appeal sitcoms and *Love* to serve as a femme-appeal companion to *China Beach*.

ABC also tried out a comedic block on Sunday night a year ago against NBC's Seoul Summer Olympics coverage. That two-hour comedy experiment—consisting of reruns of *Growing Pains*, *Head of the Class*, *Who's the Boss?* and *Perfect Strangers*—ranged from 17 to 21 in share.

The use of blocks and thematic schemes is no guarantee of success, as agency execs point out. Despite *Roseanne*'s hefty Tuesday lead-in, for instance, ABC's *Chicken Soup* is losing considerable audience. Most sources feel *Soup* is "too ethnic" and the premise "too unreal," and some like McCann-Erickson's executive vice president Joel Segal had projected even before the season that *Soup* would lose 20% or so from *Roseanne*.

Left unchecked, Poltrack estimates, the drain could cost ABC "maybe as much as a rating point" in the Nielsen race.

On Friday, BBDO has predicted, ABC should continue its winning ways as CBS' serial block continues to decline and NBC's male-appeal action block moves into contention.

Bozell, meanwhile, projected that ABC would lose some momentum, with *Hardball* the strongest element in NBC's action roster. However, some buyers were disappointed at the initial 18 share *Hardball* posted on Friday Oct. 13 after solid Thursday previews.

Sunday substitutes

On Sunday, neither ABC's nor NBC's new sitcoms seem to be attracting the former fans of NBC's *Family Ties*. With Barbara Eden's *Brand New Life* hour comedy element of *The Magical World of Disney* as a lackluster lead-in, NBC's *Sister Kate* is averaging a 15 against *Murder, She Wrote*. The series' premise also hurts, some feel. "The show by its nature has its limitations," Poltrack says. □

Must-carry musters troops

Channel-positioning issue clouds industry agreement

By HOWARD FIELDS

Sen. Daniel Inouye (D-Hawaii) just couldn't say no. As a result, he may have heaped an impossible task on his Senate Communications Subcommittee staff—giving everyone something in must-carry legislation.

But then, neither could the representatives of five TV groups sitting before Inouye say no. Acting in the best tradition of legislative interplay, Inouye offered a compromise to the impasse the conflicting industries had faced for the past several months. Most of the industry representatives jumped at the offer, some weighing in with some important "ifs."

In the process, some other important issues that had been in the cards until the must-carry hearing may suffer a loss of progress. Children's television legislation, which had switched to the fast track, may now get delayed along with any associated effort to reregulate the cable industry. And if kidvid legislation is not delayed, must-carry legislation proponents may have to choose between changing their minds and accepting it in the bargain or dooming must-carry for the near future.

Pandora's box

Inouye's supposedly simple offer, which could in fact be opening a Pandora's box, was: "Assuming this proposal is constitutional, we grandfather the positioning, and call upon the FCC to come forth with some process or procedure within a given period of a year or two years to resolve positioning matters that are challenged or questioned."

Congress could fashion a law itself, Inouye said, "but since this matter of positioning is so important, it should be given the widest time for consideration, giving all stations an opportunity to appear before the FCC such as necessary."

Nearly all parties to the issue agree there should be a restoration of must-carry rules. The difficulty in the past had been constructing a rule, or a law, that would pass constitutional muster over concerns of infringement of the First Amendment rights of the cable industry.

But along the way, as compromise after compromise was worked out, massaged, approved, and litigated, new issues kept coming along. The latest issue also is the latest hangup to reaching a lasting compromise—channel positioning.

Broadcast-cable compromise

Network affiliates with channel assignments in the VHF range have had few quarrels with the channel position they are assigned on cable. Usually, they retain their over-the-air channel number. But after the 1984 Cable Act virtually freed cable from all regulation, and the move toward vertical integration in the industry grew, systems began rearranging their mix of channel positions, often to put channels in which they or their multiple-system operator had a major investment, into lower channel positions, considered more favorable.

In the process, independents and others, who often market their station by the channel number, got moved to higher numbers, and others were simply dropped from carriage in the absence of must-carry rules. They cried foul.

Eddie Fritts, president and CEO of the National Assn. of Broadcasters, and James Mooney, his counterpart at the National Cable Television Assn., have acted like good buddies since they worked out a must-carry compromise earlier this year. But each has his handy allied protagonist—Preston Padden of the Assn. of Independent Television Stations (INTV), and Steve Effros, of the Community Antenna Television Assn. The roles of the four have been for Fritts and Mooney to take the high road as the great compromisers and for Padden and Effros to be flies in the ointment.

Playing his role well, Padden nixed the must-carry agreement worked out by Fritts and Mooney, claiming that any agreement that lacked channel-positioning language would be unacceptable to indies. Even though Rep. John Dingell (D-Mich.), chairman of the House Energy and Commerce Committee, had offered expedited consideration of anything the industries offered, INTV opposition was considered enough to doom chances of congressional passage.

Mooney, Fritts, Padden, and David Brugger, president of the National Assn. of Public Television Stations, applauded Inouye's compromise, but Effros was more cautious, raising the possibility he could be the ointment's next fly. He told TV/RADIO AGE that his organization would have to have some sort of guarantee that if channel positioning were grandfathered and then turned over to the FCC for resolution, that broadcasters wouldn't return to Congress a year

Sen. Daniel Inouye (D-Hawaii)

When he offered a compromise, most industry reps jumped at the offer, but there were some "ifs."

or two later with another request for a channel-positioning law.

After that group left the hearing room, four other industry representatives took seats and made objections to Inouye's compromise. Inouye responded with promises to each that his staff would be instructed to work with them to include them in the final compromise. That could require the wisdom of Solomon.

Robert Johnson, president of Black Entertainment Television, complained that giving independents, public stations, and any other entities a preference in considering channel positioning necessarily means his channel and other cable channels must be located or moved to less favorable positions. That would be akin to treating his channel for blacks to a second-class status, he said. BET and other "First Amendment speakers" should receive equal treatment he said.

Court test threatened

If the Inouye compromise reached law, he said, "We would be compelled to undertake a test in the courts to see if it is fair, because we believe that the federal government should not mandate a preference for broadcast speakers." Johnson, speaking emotionally, added, "the only fair thing for Congress to do is to say to Mr. Mooney, Mr. Fritts, and Mr. Padden, "If you're going to carve out legislation, be sure to take into account the interests of all speakers."

Inouye responded, "I can assure you, Mr. Johnson, that if we are to come forth with legislation, it will not be one that would relegate you to any second- or third-class citizenship.

INTV's Preston Padden

Says any agreement without channel positioning language would be unacceptable to independents.

CATA's Steve Effros

Wants some sort of guarantee that grandfathering of channel positioning will be the end of it.

He had similar responses to John Kompas, who complained that members of his Community Broadcasters Assn. of low-power TV stations have never been included in must-carry considerations, and to Paul Crouch, owner of the 12-station Trinity Broadcasting Network and president of Cable Access Legal Action Council, representing "hundreds of independent and specialty TV stations that have been denied carriage or dropped by cable systems or been repositioned to less-desirable channel positions."

Even if all of those permutations of caution and objection were overcome, Inouye already had made another decision that could have an impact on much more than the must-carry issue under discussion. If Inouye is successful, however, it could put broadcasters in the uncomfortable position of accepting onerous legislation regarding children's television in return for a must-carry solution it wants desperately.

"This children's TV bill would be an obvious and appropriate vehicle for the must-carry legislation," Inouye said. The kidvid bill already had become endangered, so far as broadcasters were concerned, by expansion of restrictions on the amount of commercials that can be shown on children's programming, beyond measures originally introduced and supported by them and public interest groups.

Broadcasters apparently had attempted to induce the cable industry to help to block the legislation by getting an amendment to include children's programming on cable in the restrictions on commercials. But the effort backfired when, at a later hearing, cable said it would have no objections, as its channels showing children's programming already are well within the restrictions envisioned.

Further kidvid damage

But the potential for further damage already had surfaced. Sen. Albert Gore (D-Tenn.), who makes no secret of his animosity toward the cable industry, has introduced a package of legislation aimed at reregulating the cable industry. When arrangements were made for acceptance of an amendment applying commercials restrictions to children's programming on cable, he suggested he might consider some additional amendments of his own.

There also was the promise made at the beginning of the year by committee leaders in both houses of Congress that nothing the broadcast industry wants passed will see the light of day until the fairness doctrine is codified and children's TV legislation is passed. House leaders were not likely to forget that promise. And, as the must-carry compromise was being germinated, Congress still had not codified the fairness doctrine. □

Viewpoints

Michael Jones

President, Jefferson-Pilot Data Services. Jones joined Jefferson-Pilot Communications in 1967 as a research/ development engineer, eventually moving up to general manager, Jefferson-Pilot Data Systems and, after the acquisition by Digital Equipment Corp., to president, Jefferson-Pilot Data Services, leading supplier of broadcast software.

Selling in the 1990s: Depart the paper trail, move ahead with marketing

Here's a sales scenario that I think might sound familiar: A buyer calls a sales representative. They talk flight dates and target demos. The salesperson puts together an avail, then talks again with the buyer, discussing rates and schedules. The rep fills out an initial order, by hand. This goes to the sales manager, who approves all but three of the spots.

So the sales representative goes back to the buyer. They renegotiate. The order goes again to the sales manager and is completely approved. Next, the order goes to traffic, but by the time it gets there, not all the spots clear.

So it's back to the sales rep, and then, after another talk with the buyer, back to the sales manager, and on goes the process—a process that's slow, manual and extremely paper intensive. And in this particular instance, one that so frustrated the buyer that next time she ended up placing the buy with newspaper instead.

This may be an extreme example, but it proves a point: To win in an increasingly competitive media marketplace, sales representatives need to be able to respond to buyers' needs in swifter, more sophisticated and more strategic ways. It's time to trade in the yellow pads, pencils and calculators for marketing savvy and technology tools. It's time to make broadcast an easier buy.

'Value-added' sales

Today, there's a proliferation of media inventory for sale—cable, barter, specialty magazines, direct mail. Buyers have more ways to spend increasingly tight advertising dollars, and sales has more to keep track of and compete against.

From one perspective, this presents an excellent opportunity for sales reps to step in and work with the buyer as a consultant and planner, positioning their station as not just a place to buy time but also a resource that can help the buyer's business accomplish its own marketing and advertising goals. The increased competition in the marketplace also signals the need for sales to work harder to promote and package its product creatively. Reinforcing the sales efforts via marketing is one way to boost sales from existing clients and win new clients as well.

To accomplish these things, every member of the sales department needs ready access to more intelligent information—demographics, competitive analyses, industry and market trends, as well as rates, ratings and inventory. And this means sales management, too. As the broadcast industry becomes increasingly complex, management needs this same information to move beyond "react" mode—to get a handle on sales activity and performance, to truly understand the pressure on the inventory and to make more informed pricing decisions.

Such vital information can always be just a few keystrokes away if broadcasters adopt the technology tools already deployed in many other industries.

New tools of the trade

In many ways, broadcasting is a technology-intensive business—in every department but sales. Now is the time to bring that sales department up to speed. Certainly, many sales departments have a personal computer here and there. That's a good starting point for evolving into a more sophisticated system—one that can link individual personal computers together so that information can be quickly obtained and easily shared. Thanks to automation, research programs, avails, orders and contracts can all be done at the keyboard. A complete buying history of a client can be accessed in seconds.

Rate information and inventory availability can be kept completely current, at all points in the sales cycle. And every step of a buy, from the initial order-taking through the sales manager's approvals, straight on to the traffic department can be handled "online." No more duplicating of efforts. No unnecesary delays or errors.

No more paper trails. Instead, sales can be better equipped to tackle the job at hand: marketing the broadcast inventory and bringing in the sales.

Automation can elevate the impact of each sales communication—a phone call, a customer visit, a proposal. The computer system keeps pertinent information close at hand, so questions can be answered more quickly and presentations can be more comprehensive and therefore more effective.

In general, automation helps sales reps become more productive and more valuable to their customers. Heightened responsiveness on the part of sales can work to shorten the order cycle and also boost customer satisfaction. That way everyone benefits.

There is no doubt that the 1990s are going to be a challenging time for broadcasters. But I believe that if you sharpen your sales skills with marketing knowhow and support those efforts with the right technology tools, you can obtain the two goals most crucial to any business: saving time and generating more revenue.

Programming

Syndie, cable film deals reflecting changing marketplace, station needs

The Orion Television Entertainment film package deal with Lifetime Television, the second of its kind within a month (after Buena Vista and USA Network, TV/RADIO AGE, Oct. 16) whereby movies are sold to cable prior to syndication, is probably the tip of the iceberg. While the consensus is that more similar arrangements among other parties will follow, syndicators are saying, at least at Orion, that the deals are borne from practical necessity dictated by a shrinking movie marketplace. And, at Orion, the feeling is that if it had its druthers, its primary customers would still be television stations. So far as the television broadcast community is concerned, at least as expressed by one television executive, these moves are being condoned more than condemned but with the condition that stations at least be given an opportunity to buy the movies before they are offered to cable.

Gene Hackman, *l., and Willem Dafoe star in "Mississippi Burning," one of the films in the package sold by Orion Television to Lifetime.*

The Orion arrangement with Lifetime, which involves a total of 42 films, 23 prior to syndication and 19 in syndication, is said to cost Lifetime between $38 million and $42 million in a four-year deal.

Pragmatic. Bob King, appointed president, domestic syndication a few months ago, looks at Orion's deal in pragmatic terms. "Just look at the marketplace. If you look at the available movie windows, you see there aren't many, so it's tougher to sell to over-the-air television.

"We have been talking to these stations, and I don't think they will be mad or upset, and some of the titles have already played through a syndication window. I think that's rather new. We have talked with stations initially and they rejected it. We have been talking about movies that haven't been released yet and Orion has been exploring cable ever since I came here.

"I don't think it's unique to do this. Movies in general are staple fare for the viewer, and it's not just independents who buy feature films. When free TV's window started to erode, it was very natural that cable would come in to fill that void. The old Metromedia markets are not buying many features nor are the Fox stations, so we are being cut from an avenue, and others are cutting their movie inventory as well."

King points out that because there are fewer movie windows available on commercial television stations, syndicators are settling for less money per title than they did a few years ago. In the sale to Lifetime, Orion took the best dollar volume available, says King, with titles that were "tailor-made to meet the marketing needs of Lifetime."

As to future arrangements on movies, King says Orion expects to "constantly survey every single place we can sell feature films to. Our traditional business has always been with independent stations, but affiliates buy them and now cable networks seem to be coming in.

"It would be nice to go to the traditional marketplace and sell for more money, and we hope that starts to reappear. But I don't think it has in the last two years. I can't believe that independent stations won't change their direction and buy more feature films. We are not avoiding them. It's a demand and supply situation on a market-by-market basis."

Two reasons. There are two main reasons for a station such as KBVO-TV, Austin indie and a Fox station affiliate, not to buy additional movies at present from suppliers such as Buena Vista and Orion. According to Steve Beard, general manager, program manager at the station, KBVO bought movies "heavily" at the past NATPE, and as a Fox station, a portion of its primetime is taken by Fox first-run programming. Also, the station is playing close to the vest on future movie packages, in anticipation of Fox locking up additional primetime nights.

At present, Fox has three nights—the weekend and Monday—but is expected to roll out a movie night on Wednesdays next January; a new series on Fridays, beginning next fall; and the final two primetime nights to be filled out in the summer and fall of 1991, according to sources.

Beard says he has no particular beef with the separate deals made by Orion and Buena Vista with cable networks. "I don't blame them. They are in business to make money, and if they can't sell the movies to a station, they have to go elsewhere. However, I would like an opportunity to look at the movies before they go to cable. But if I have to say no, it's because of my pocketbook.

Station's needs. "It all becomes a matter of a station's needs, and with Fox drying up that need because of the success it's having with their primetime, and with Paramount's *Arsenio Hall Show* taking off like a Roman candle, there are a lot of programming environments we can look at that will appeal to a modern audience.

"Movies are all over the place. There's not one night that you don't have a choice of 10 to 15 movies. That's just competition we will have to face up to and, hopefully, a local TV station can generate enough interest through its own over-the-air shows to offset what impact cable is having."

Beard points out that the station began programming primetime movies in 1983, "but since that time cable has come on and is programming a lot more movies. I have no control over that. But we have bought what we consider to be the very best titles, and as they come on line we will be programming those in whatever time periods we have available at that time. And we will be promoting them very strongly."

In all, Beard says the station bought a total of 210 titles in February, which gives KBVO a stable of 1,500, "so I need more like a hole in the head. What I do need is movies to run in the 1994–95 area, and not just numbers. I need selective titles. I think they will have to reduce the number in a package."

Besides such box-office heavyweights as *Bull Durham, Mississippi Burning, Married to the Mob* and *Dirty Rotton Scoundrels*, other Orion titles in the Lifetime deal include *Farewell to the King, Unbearable Lightness of Being* and *Dominic and Eugene*. Among the 19 titles that have been in the syndication marketplace are *Hannah and Her Sisters, Back to School, The Cotton Club, Broadway Danny Rose, Falcon and the Snowman* and *Desperately Seeking Susan*.

Apollo pilot set on new music

Apollo Theatre Productions and Rush Artist Management plan to produce a pilot for a series which they see as the answer to grabbing back the young demo defection to cable's *Dance Party USA* and *Yo! MTV Raps*. The projected strip, tentatively called *New Music Report*, will be available for syndication in early 1990 on a barter basis, according to Chuck Sutton, a spokesman for Apollo.

Hosts of the projected series will be Doug E. Doug and M. C. Search, two comedians. The half-hour show will feature live performances from and interviews with today's top music talent. Scheduled to appear on the pilot are New Kids on the Block, Jazzy Jeff and Fresh Prince, and others.

The success of the cable shows has "blown a door that no one from broadcast television has yet had the sense to walk through," says RAM president, Russell Simmons.

Calico develops three animation shows; major studio, network deals expected

Calico Creations has formed an entertainment division, in an expansion of its production line, and is developing at least three animation projects. The division was responsible for the animation production of the successful *Denver, the Last Dinosaur* and for *Vytor, the Starfire Champion*, in partnership with World Events Productions.

According to Tom Burton, division president and vice president and cofounder of Calico, the division has presented two of the prospects to a major studio and syndicator and to a network, and deals are expected shortly. While Burton won't talk in detail about the ongoing discussions, he says the studio may use one of the shows, a half-hour kids' show with music, as part of a planned kids' strip block in syndication, although Burton had been looking to roll out the show in a way similar to its *Denver* rollout. *Denver* began as a one-hour syndicated special, became a weekly series and to have enough episodes for a strip. The other kids' show may wind up as a web weekly show on Saturday mornings beginning next fall.

The other animation project has not yet been presented. It is based on a long-running five-minute radio show, *Chickenman*, which is a spoof of super heroes. Plans for the television show call for it to be produced initially as a one-hour special, with a weekly series down the line.

In the live-action area, Calico, under its live-action division, Westar Entertainment, has two shows which have been completed as pilots. One, a half-hour series, is called *Eye on Golf*, says Burton, and is sanctioned by the Southern California Golf Assn. and aimed directly at the amateur golfer, entailing such things as golf fitness, how golf clubs are made, interviews and travel opportunities.

The other is called *The Sports Page*, a magazine format program designed as a half-hour weekly series. In conjunction with the production of the *Golf* and *Sports* shows, the company is contemplating setting up a syndication division, says Burton.

But as to the animation projects, Calico is looking for distributors. "We are not pretending to be in that game. We're not set up to do that. We see ourselves as a strong partner to provide the missing link to syndicators." Also, he points out, the company wants to be selective in producing shows. "We don't want to be a factory, just cranking out shows indiscriminately."

Tom Burton

Also, notes Burton, Calico brings to the table "an appealing image" to any potential partner. "We're not just cartoon guys. We know how to sell through and to package shows." In this regard, he points out, Calico and its other divisions, California Star Productions and its commercial/media promotion unit, have been working with broadcasters and syndicators in a number of areas for the 15 years since the company was formed. Lee Mann is president, cofounder and executive producer of the umbrella company.

Indies' revenues up 'dramatically'

Independent television stations' revenues as a whole are up dramatically over the increases by affiliates, according to Lana King, vice president, marketing at the Assn. of Independent Television Stations. "Affiliates," she says, "have seen about an average of 3–4% increases. We, on the other hand, have been seeing about an 11% increase for the first two quarters of this year. A lot of that has come from movie business, a lot from fast foods and automotives.

"There are a lot of strong ad categories, and the independents are becoming the beneficiaries of that. A lot of the increase is because our numbers are going up with the network erosion. We are really commanding larger audiences, and with larger audiences, obviously, the ratings go up and we get a larger portion of the revenues.

Meanwhile, kids', a programming genre that is getting new attention from broadcasters and syndicators and which will be highly competitive going into the early 1990s, will be the focal point of one of the INTV convention panels this January.

The session is called "Kids' Wars," according to King. King notes the session hopes to zero in on where the INTV membership stands on kids in a general sense, including what indies' programming plans are and how they perceive the kids' market.

Media Service, ACI, formed by three

All Communications International, a broadcast media service, has been formed as a joint venture by three TV industry veterans. Partners are Claude Hill, president, ARP Films; Dan Chepley, Jr., president, Channel 1 Entertainment; and Marie LeFevre, former president, MCL Media. LeFevre will manage the new service from its New York offices, 342 Madison Ave. West Coast offices are in Sherman Oaks.

Hill and Chepley will be cochairmen of ACI, and LeFevre is president. According to Hill, ACI will be a full-service broadcast media company, both domestic and international. Plans call for a London office to be set up in 1990.

Syndication shorts

Worldvision Enterprises has acquired the rights to *Future Stuff*, half-hour weekly series looking for a fall 1990 launch. *Stuff*, produced by Laurel Entertainment in association with Marathon Entertainment, features the newest consumer products, which will be critiqued by the show's cohosts. The series is based on the Viking-Penguin book.

Claster Television's *G.I. Joe* has been sold to 73 markets representing 77% of the U.S. The fall 1990 strip will include 24 new episodes as well as existing episodes. Station lineup includes WPIX(TV) New York, KTLA-TV Los Angeles, KTVU-TV San Francisco, WLVI-TV Boston, KDAF-TV Dallas, KCPQ-TV Seattle and KMSP-TV Minneapolis.

The Baruch Television Group will market a one-hour prefight TV special, *The Showdown*, featuring Sugar Ray Leonard and Roberto Duran. The TV window is set for Nov. 25 through Dec. 7 and offered to stations on a barter basis of seven minutes for local sale and five-and-a-half for national. The fight is Dec. 7.

JM Entertainment's *The Great Bear Scare* and *The Bear Who Slept Through Christmas*, two annual half-hour animated specials, have been cleared in more than 130 markets representing about 85% of TV households. Stations cleared include WABC-TV New York, WPWR-TV Chicago, WGBS-TV Philadelphia, WXYZ-TV Detroit, WJLA-TV Washington, KTXA-TV Dallas, WEWS-TV Cleveland and KHTV(TV) Houston.

Blair Entertainment has cleared the one-hour off-network TV special *Motown Merry Christmas* in 120 markets. It is available Nov. 24 through Dec. 24.

Cartoon fever grips Warner Brothers; Disney, H-B, King make overseas moves

Interest in TV cartoons has become more animated lately at Warner Bros. Television.

Not only has Warner added the newly popular *Bettlejuice* cartoon to the perennial Saturday morning hit *The Bugs Bunny & Tweety Show* on ABC's Saturday morning lineup but it has added *Police Academy—The Series* to this fall's syndication field and *Tiny Toon Adventures* and *Merrie Melodies* to fall 1990's.

Moreover, while celebrating Bugs Bunny's 50th birthday and offering *Bettlejuice* and *Tiny Toon Adventures* for international TV release at MIPCOM in Cannes, Warner Bros. execs revealed still more animation activity ahead.

Michael Solomon, president, Warner Bros. International Television, and Sanford Reisenbach, executive vice president, Warner Bros., said that several other movie projects may yet spawn animated series, with *Gremlins* and *The Goonies* now in development—and, adds Reisenbach, "who knows down the road, possibly *Batman*."

Warner, which until last year had not done any original animation for 25 years, also has *The Family Dog* in development. The latter was an episode on the Steven Spielberg-produced *Amazing Stories* primetime anthology series on NBC a couple of seasons ago. Spielberg also is collaborating with Warner on *Tiny Toon Adventures*, a 65-episode series whose eight-digit budget is "certainly the most expensive" in animation annals, says Edward Bleier, president, Warner Bros. Animation

"Who Framed Roger Rabbit?" *will be the first Disney film to go to broadcast TV abroad instead of to home video or pay TV.*

Roger's TV hop. Walt Disney Co., Hanna-Barbera Productions and King Features Entertainment were among others making animation news at MIPCOM.

Etienne de Villiers, president of

Disney's Buena Vista International Television arm, said that *Who Framed Roger Rabbit?* would be the first Disney film made available for international TV broadcast sales. In the past, its animated classics had gone to home video and pay TV rather than broadcast TV. *Roger Rabbit* was the No. 1 movie in 1988 box office at $330 million globally and second only to *E.T.* in foreign box office at $177 million, he noted.

Roger Rabbit, de Villiers said, "will be available in most territories for licensing by broadcasters by Christmas 1991." In the U.S., where the home video was released in mid-October, the movie, a mixture of animation and live action, will run on The Disney Channel and Shwotime before going to CBS, he added. As for *Tummy Trouble*, the nine-minute Roger Rabbit cartoon short released in the U.S. last summer and overseas currently, de Villiers said there has been no decision as to how that will be marketed after its theatrical run, including whether it would be packaged with the feature film.

Customizing cartoons. A *Roger Rabbit* theatrical "prequel" is in development at Disney's Touchstone Pictures, de Villiers discloses, although there is no release timetable since some of the original cast are not available yet.

At Worldvision Enterprises, *The Hanna-Barbera Hour* is being prepared for a 1990 European release, including in France, Italy, West Germany, Spain, Greece and Holland. The customized compilation series will blend Hanna-Barbera's library with locally produced material in each overseas market, according to Bert Cohen, Worldvision's executive vice president and chief operating officer.

Meanwhile, King Features Entertainment has decided to produce *Prince Valiant*, inspired by the King Features comic strip.

Zooming in on People

Arthur Price has resigned as president and CEO of **MTM Enterprises.** Price cofounded MTM in 1969 with Mary Tyler Moore and Grant Tinker. He initially served

Videotape and Film Post Production Services

as executive vice president of the company and assumed the presidency in 1981.

James McNamara has been named president, **New World International,** and **Tony Brown** is president, New World Domestic Distribution. Most recently, McNamara was executive vice president, inter-

James McNamara

national TV distribution, New World Entertainment. Brown had been senior vice president and general sales manager of the domestic distribution division.

Lenny Bart has been named to the newly created position of vice president, research, **Warner Bros. Domestic Television Distribution.** Most recently, Bart had been vice president, syndication research, WBDTD. He began his career at Paramount Pictures in 1982 as a research analyst before joining Telepictures Corp. in 1985 as manager, research.

Jay Leon has been promoted to director of Research at **Camelot Entertainment Sales.** Prior to joining Camelot in January 1988, Leon was a research analyst at Petry Television.

Terry Phillips has been promoted to the new position of vice president of sales, and **Kerry Moore** has been named western sales manager

Terry Phillips

at **Acclaim Entertainment,** based in Oyster Bay, New York. Phillips joined Acclaim in 1987 as national sales manager and was promoted to director of sales in 1988.

AFT in expansion of Republic deal; cost up to $8.5 mil

American Film Technologies has extended its current agreement with Republic Pictures Domestic Television in a deal worth as much as $8.5 million. Under the new arrangement, engineered by Stan Rutledge, executive vice president, sales at AFT, AFT will Colorimage up to an additional 34 movies, with a minimum of 13 guaranteed films over the next three years. To date, AFT has Colorimaged 10 films for Republic.

AFT's biggest customer is Turner Entertainment, with which AFT has a Colorimaging agreement for 180 films, "with all kinds of options," says Robert Glaser, AFT president. Also, four 20th Century Fox films have been Colorimaged, with unexercised options for another 20 films, and there is a single-picture agreement with Four Star International.

Also, AFT, in a new arrangement, is doing Colorimaging for Disney, although Glaser doesn't want to give details. AFT, in addition, Colorimaged five films from public domain for its own account. Three were full-length feature films, *Gung Ho*, *The Scarlet Pimpernal* and *Eternally Yours*, and two were *Sherlock Holmes* movies. The three films were distributed as part of what was supposed to be a 12-film package. But, according to Glaser, the three films had poor run times on weaker stations, and AFT and Orbis agreed to part company after their showing. Glaser says other distributors are interested in syndicating the films.

The *Sherlock Holmes* films were distributed through Multimedia Entertainment as part of a two-program agreement. Each is three hours in duration, and the first program was distributed in April. The second has 93% clearance, says Glaser, and will be shown this month.

Cable Programming

Under a deal with Columbia Pictures Entertainment, **Showtime Networks** will get the exclusive rights to an undetermined number of to-be-released Tri-Star titles over the next three years and the nonexclusive rights to some 60 other titles. The films under the exclusive arrangement will air in 1992, but titles were not revealed. Nonexclusive titles include *Karate Kid III*, *The Bear*, *Look Who's Talking* and *Punchline*. Home Box Office has a similar arrangement on the nonexclusive package.

Arts & Entertainment will air a one-hour special, *The Ring*, a talk show to be produced by DIR Television. The show airs on Dec. 17 at 10 p.m. The special will feature conversations with and performances by one well-known music guest and provocative questions from an audience of celebrity peers. *Ring* is planned as weekly A&E series for early 1990. Graham Nash of Crosby, Stills & Nash will host.

USA Network is going all out with a number of holiday specials for year-end. Featured will be such animation favorites as Mr. Magoo and film classics including *Miracle on 34th Street*. *Mr. Magoo's Christmas Carol* airs Dec 5, 9, 17 and twice on Dec 25. *Miracle* airs Dec. 17, 19, 24 and 25. Other fare includes a New Year's Eve movie night with *Porky's* at 10 p.m., followed by *Porky's: The Next Day*. For Thanksgiving Day, a classic comedy marathon is set. Shows include *Flying Deuces* with Laurel and Hardy.

Republic Pictures Domestic Television will supply the **CBN Family Channel** exclusively with 50 additional episodes of *Bonanza: The Lost Episodes*, for a total of 169. The 50 have not been seen on TV in more than 25 years.

Turner Network Television has begun shooting *The Rose and The Jackal*, slated to air in April 1990. Christopher Reeve and Madolyn Smith star in the movie, which is based on a true Civil War love story.

TELEVISION/RADIO AGE

Station Report

November 13, 1989

PROMOS WITH NETWORK GLITZ

KCBS San Francisco and KRLD Dallas-Fort Worth are making the most of their CBS Radio affiliations in promotions, borrowing celebrities and creating network/local sales packages./47

THE CUSTOMER'S CUSTOMER

WCVB-TV Boston is opening up doors to hard-to-reach prospects by offering them data on their customers. This has also led to a major expenditure increase by an existing client./48

BUYER'S OPINION

Richard Kostyra of J. Walter Thompson aims to shatter some myths about the fractionalization of media, confirming the importance of mass media./49

SPOTLIGHT ON...

"This Old House" has been renovated into a new syndicated show compatible with Sears' customers pocketbooks. Ogilvy & Mather's David Wurfel tells how./51

WCVB-TV uses customer research to approach difficult prospects

What advertiser wouldn't want a highly researched profile of his typical customer—a profile that includes not only age, consumer behavior and shopping patterns, but also detailed media and psychographic information?

That's exactly what WCVB-TV Boston is giving its clients. And this information is being given away to them free.

WCVB vice president, general sales manager Deborah J. Sinay points out that her station "has, since spring, provided clients with the impressive research resource of Marshall Marketing." This Customer Trac information, she says, "opens doors to direct interaction with hard-to-reach prospects. Then, once a WCVB marketing or sales person is inside the door, Customer Trac sparks discussions regarding the advertiser's fears, market strengths and weaknesses. The sales benefit to us," she explains, "is that by providing greater service, we can strategize with our new information and ultimately steer the prospect toward using television."

After only six months of using Customer Trac, WCVB scored a major breakthrough with local advertiser Jordan's Furniture. Says Sinay: "They have increased their expenditures with us for the coming 12 months by more than 150%."

Another landmark was reached more recently when WCVB used Customer Trac to land a six-figure contract with Boston-area retailer Able Rug, a non-TV user for 15 years, according to Sinay.

She says the typical user of WCVB's and Marshall Marketing's Customer Trac is the advertiser himself: "Most of the calls we make are client-driven. We ask the client to invite his agency, although most choose to go solo, allowing for more information to be exchanged."

WCVB account executives work with clients to discover more about the businesses in which they engage, about their competition, their customers and their plans for the future.

Sinay says, "While we don't release Customer Trac information to anyone but our clients, we can say that the research generally reaffirms the advertisers' concept of who their target market should be. Or it helps them reposition themselves for future growth. In the case of Jordan's Furniture, for instance, young urban professionals, age 25–49, were in the group Jordan's was looking at, and our research proved them properly positioned."


Deborah J. Sinay

She continues, "We also show them the relative benefits of all media except magazines, so that they can make the wisest use of their advertising dollar."

At WCVB, Customer Trac startup meant a 13-week educational program headed by marketing director Terry Mulvey, and proficiency in using the research means constant updates for the sales staff.

Sinay points out, "We all feel more challenged and more professional in dealing with clients on the level Marshall Marketing provides. In coming months our attention will be well focused, and our sales force will have the tools they need to get and keep clients interested. If service is the key to the 1990s in sales, then we are better prepared to deliver than anyone in our market."

KCBS, KRLD weave network glitz into local promotions

(from page 47)

Texas football and CBS Monday Night Football are all in the same ballpark makes it easier to sell all three."

Houghton says that just as the network's sportscasters "add to the prestige of our own local play-by-play personalities, the same goes for our KRLD news team. This is all the more important because we're an all-news and sports station. So when there's a major event going on like the San Francisco earthquake, a hurricane as bad as Hugo or a space shuttle mission, after the national correspondent does his regular feed that goes out to the whole network, he'll talk directly to our top news people here, and to those of a few other key, major-market CBS all-news affiliates. This way, our own local experts can talk to the network's national science correspondent on the spot, ask him questions, and get answers back, live, direct from San Francisco, or direct from Cape Canaveral."

Advisory committee. Houghton is a member of CBS' affiliate sales advisory committee, which meets face-to-face twice a year at events like the Radio Advertising Bureau's annual sales convention or the annual golf outing of the Broadcast Advertising Club of Chicago, easy for everyone to get to because it's centrally located in midcontinent. And the advisory committee meets another two times a year via telephone hookup.

With 20 stations chipping in, says Houghton, "It's amazing, the number of useful new sales and promotion ideas each of us takes away from these get-togethers. And don't forget the suggestions the network gets for beefing up our local sales kits with additional materials from CBS."

Houghton says, for instance, "The network will have Jack Buck tape promos for us that tell our listeners 'Don't forget to tune in for Brad Sham and Dale Hansen [KRLD's own play-by-play team] when they bring you such and such an event Saturday afternoon.' That kind of personalized reminder from major nationally known sports experts can be very effective audience builders."

He recalls, "When Volvo sponsored Walter Cronkite's *Twentieth Century*, the network sent an audio tape down the line to each affiliate with the voice of Volvo's own 'affiliate relations man,' in charge of Volvo headquarters contact with all its dealers, telling the dealers what a great deal Walter would be for them, and how the dealers could get together with their nearest CBS affiliate to make the most of it.

"CBS also sent us a list of the Volvo dealers in our own coverage area. We already knew most of them, but for those affiliates who may not have known as many in their market as they should, it was a complete information package to help each of our stations sell their own local Volvo dealers on an additional tie-in to the national sponsorship."

Similarly, recalls Houghton, "When PIP—Postal Instant Press—bought its network schedule, an alert came down the network line to the affiliates, not only notifying us of the length of the campaign, as CBS does with all its schedules, but also that PIP was offering dealer support money and that these local co-op dollars were available. So here was an additional incentive our own KRLD sales force had to offer to PIP's local printing operations here in Dallas and Fort Worth, and this put us in position to work out a schedule and co-op plan with PIP's regional manager."

Houghton says that when the Cowboys play *Monday Night Football* games at home, "We're the flagship station for the Cowboys. We take our clients to the press booth to meet Jack Buck and Hank Stram, and when they're here in town they become part of the KRLD team. They're great at it."

One Buyer's Opinion

Mass media still form bedrock of most national buys

Kostyra

There have been important changes in our American media during the last decade. The television audience has fragmented, spurred by the proliferation of cable into a majority of U.S. households. Hundreds of new magazines have been launched, the majority targeted to very narrow slices of the consumer base. A national daily has revolutionized the newspaper industry. And we've witnessed the emergence of "new electronic media" such as home video, videotex, and even electronic shopping carts.

The consumer press, notoriously introspective, has given these developments a great deal of attention. While the majority of coverage has been "fair," some myths have also been propagated that are clouding our perception of the emerging media environment.

The inevitable decline of mass media is one of these myths. The truth is, mass vehicles still control a dominant share of leisure time among most American consumers. For advertisers, mass vehicles continue to offer enormous reach potential and high impact. And this is likely to be the case for quite some time. Yes, the major media have entered an era of greater fractionalization. Still, by any standards, one has to be impressed with the sheer size of audience for major media vehicles.

Network television, despite eroding audiences, continues to enjoy enormous reach. Nearly all homes with a TV set tune in to network each week, and almost 95% watch network during primetime alone.

Audiences for the highest-rated network series exceed 30 million Americans. Even larger figures are posted for special event programming.

Magazines also claim huge audiences. All of the top 10 magazines are read by more than 20 million American adults, or over 10% of the total population. The most widely-read publication, *TV Guide*, reaches more than one in five American adults. Newspapers, too, continue to exemplify mass communications. More than two-thirds of all American adults read a daily newspaper, and Sunday supplements consistently reach more Americans than any other media outlet.

With a growing menu of smaller and mid-sized vehciles available today, consumers enjoy a wide range of media options. The majority of time spent with media is devoted to mass vehciles, but consumers also express individuality by interacting with more targeted alternatives.

Media planners have adapted to the new landscape by using a wider range of media alternatives. High levels of brand awareness are achieved by first establishing a base of high-reach, high-profile communication via mass vehciles. Niche vehicles are then used to *augment*, not replace, the mass media buy. Our agency and other major agencies and advertisers demonstrated a renewed commitment to mass media during the 1989 upfront negotiations with the broadcast networks when we combined to purchase a record $4.3 billion in primetime commercial time. This was a 30% increase over 1988's upfront placement. With a base of television weight already established, advertisers can then use more targeted vehciles to fine tune their media schedules.—**Richard Kostyra,** *executive vice president, U.S. director of media services, in J. Walter Thompson's white paper, In Defense of Mass Media*

Appointments

Stations

Walter E. Bartlett, l., president and CEO of Multimedia, Inc., has been elected chairman of the board, succeeding **Wilson C. Wearn** who becomes chairman emeritus and will continue as a consultant to Multimedia's chairman and directors. Wearn continues as chairman of the executive committee and as a director until his term expires next April.

Crane

Rose

Steve Crane has been promoted to president of Emmis Broadcasting and **Doyle Rose,** who had been executive vice president/operations, moves up to president of Emmis Radio. Crane is succeeded as executive vice president of Emmis Broadcasting by **Randy Bongarten** who had been senior vice president/operations. **Jeff Smulyan** continues as chief executive officer of Emmis.

Barry Rose, general sales manager at KBFN/KBLX(FM) Berkeley, Calif., has been promoted to vice president. He came to KBLX nine years ago and has been general sales manager for the last six.

David Belknapp has been named general sales manager of WKTI(FM) Milwaukee. He moves up from account executive to replace **Jon Schweitzer** who now heads sister station KCWV(FM) Kansas City.

Harold C. Crump has been appointed president and general manager of Hubbard Broadcasting's KSTP-TV Minneapolis-St. Paul. Crump had been co-owner and president of WCSC-TV Charleston, S.C., and before that he had been president of the Broadcast Group of Houston-based H & C Communications.

Frank Oxarart has been named vice president and general manager of CBS-owned KCBS San Francisco. He began his broadcasting career at CBS-owned KNX Los Angeles, served 19 years with Group W Radio, and has been most recently general manager of WMCA New York.

Gloria Kostyrka is now eastern sales manager for the CBS Radio Networks. She transfers from CBS Radio Representatives where she had also been eastern sales manager and before that headed the rep's Atlanta sales office.

Richard F. Harlow and **Philip A. Zachary** have been elected group vice presidents of Voyager Communications. Harlow joined Voyager in 1983 and is vice president, general manager of WMFR/WMAG(FM) Greensboro-Winston Salem-High Point, N.C. Zachary came aboard in 1987 and is vice president, general manager of WRDU(FM) Raleigh, N.C.

Rob Knight has been named general manager of WHEB AM-FM Portsmouth, N.H. He joined the Knight Quality station as general sales manager last year and now succeeds **Richard Rozek** who is retiring after 25 years with the company.

Gerry DeFrancesco has been named to the new post of vice president and station manager of Gannett Radio's KIIS AM-FM Los Angeles, and resumes his former job as vice president/programming for the entire Gannett Radio Division. He had been vice president, general manager of Gannett's WDAE/WUSA(FM) Tampa.

Thomas Jay Vaughan has been appointed president and general manager of LIN Broadcasting's WAND-TV Decatur, Ill. He came to the station in 1966 and now steps up from acting general manager. He is currently president-elect of the Illinois Broadcasters Assn.

Dave W. Dexter is now national sales manager of Business Radio Network. Dexter was formerly general manager of WJML AM-FM Traverse City, Mich.

Ronald M. Dadetta has been promoted to director of sales, Western Region, at Westwood One, Inc. He joined the company this March as an account executive and before that had been a national sales account executive with ABC.

Spotlight On...

David Wurfel

Vice president
Account media director
Ogilvy & Mather
Chicago

Dave Wurfel of Ogilvy & Mather, Chicago says that to make the new *Home Again with Bob Vila* "as attractive to the station as the show will be to viewers," Sears, Roebuck is providing "a proven idea, carried by a proven personality, with an even wider appeal than he enjoyed on PBS."

Wurfel, in describing what's changed, adds, "As good as Vila has been on public television, most of his projects involved buying something like a $250,000 house, then adding $100,000 worth of rehabilitation to that. That's great for people who have a quarter million for shelter alone. But Bob wanted the same thing Sears does: to bring what he does on *This Old House* down to the pocketbook range of middle America. That means people who can't afford much beyond a project in the $120,000 to $170,000 range. This is the bracket of a lot more of Sears' customers, and it's also what Bob wants to do."

The upshot, says Wurfel, is that when Vila severed his relationship with WGBH-TV Boston, and through it, with PBS, "We contacted his attorney, Ron Feiner. We knew a number of syndicators were interested in a show similar to what Sears had in mind. But we were the only ones to call, representing an advertiser who wanted Bob to be its spokesman. And if it went through, as it has, it would be the first time in years that a company of Sears' stature has sponsored a program produced specifically for the company—though this is by no means any 30-minute commercial for Sears."

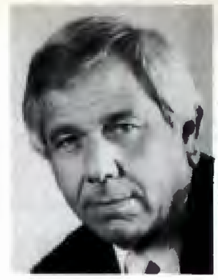
Wurfel observes: "We will be using Sears' Craftsman tools. And our commercials will be selling Sears' Installed Home Improvement service, under which Sears will send skilled construction people to do remodeling and rehabilitation. But Sears' name won't be part of the title.

"Sears owns the show, we handle the project, and it's produced by Bob's production company, B.V.T.V. It could start either next March or next September. It's for 52 weeks, we're commissioning a syndicator to clear us in markets covering 85 to 90% of the U.S., and we're looking for weekend afternoon windows."

Representatives

Thomas M. Hamilton has joined Harrington, Righter & Parsons as vice president, director of marketing. He had been senior vice president of promotional services with Campbell-Mithun-Esty and also serves as vice chairman of the Promotion Marketing Association of America.

Stanton Jones has transferred to Los Angeles as manager of Katz Continental Television's office there and **Laura Norton** has been promoted to succeed him as manager of Continental's San Francisco sales office. Norton came to Katz in 1986 from an account executive's post with WJAR-TV Providence. Jones joined Katz as a sales executive in New York in 1981, and was elected a divisional vice president earlier this year.



Bob Miggins has returned to TeleRep as vice president-West Coast manager. He started with TeleRep as Los Angeles manager in 1969, but for the past 10 years has been director of West Coast operations for Petry Television.

Bill Servick has joined Group W Radio Sales as vice president, regional manager in Atlanta. He had been with the Atlanta office of Torbet Radio and before that had been vice president and regional manager for Selcom in Philadelphia.

Charles Fleming has been promoted to New York sales manager of Banner Radio and will share the post's responsibilities with **Scott Lazare,** vice president, New York sales manager. Fleming came to Banner as an account executive, moving in from Katz Radio in 1986.

Kris Karavitis-Goff has been promoted to branch manager of MMT Sales' Atlanta sales office. She joined MMT four months ago from Katz Independent Television where she had been vice president and sales manager of the Los Angeles office.

Paul Wilson has moved up to New York team manager of the Sabers Sales Team at Katz Independent Television. He came to Katz Independent in 1983 and is now promoted from sales executive to replace **Jill Novorro,** now manager of Katz Independent's Lancers team.

Wall Street Report

Media stocks' third quarter results send mixed signals to prospective investors

Looking at several companies with newspaper/broadcast holdings, Merrill Lynch seems high on E.W. Scripps Co. but cautious on Pulitzer Publishing Co., while Shearson Lehman Hutton has lowered its earnings projection for Tribune Co. and views Gannett Co. results as disappointing.

"We have raised our 1989 earnings per share estimate from $1.10 per share to $1.15 based on decent momentum at [Scripps'] newspapers" and improvement at its United Media licensing arm in the third quarter, says Merrill Lynch's Peter Falco. "Fourth quarter results should be good," he adds, estimating 41 cents earnings per share versus the year-ago 31 cents. Scripps' broadcast segment "could have a difficult quarter due to tough year-ago comparisons," he says, referring to its three NBC affiliates having enjoyed the Seoul Summer Olympics last fall and WXYZ-TV Detroit having benefited from heavy political advertising.

Cable results for Scripps, meanwhile, "should be decent," the Merrill Lynch analyst adds. Cable, which accounts for about 25% of Scripps' cash flow, boosted revenues by 15.9% in the third quarter, compared to broadcast's 2.7% increase.

Shearson's Alan Kassan is lowering Tribune Co.'s 1990 EPS estimate to $3 from $3.10 while holding to its 1989 EPS estimate of $3.05. As for Gannett Co., Shearson is projecting its EPS at $2.70, up from $2.45 for 1989. Third quarter broadcast profits were "disappointing," down 16%, with the newspaper group slowed to a 7.4% gain, "despite benefits from a lower loss at *USA Today*." The month of September proved "sluggish" for both broadcast and newspaper holdings, Shearson notes.

Pulitzer, "at 6.1 times estimated 1990 pretax cash flow, is trading at the low end of the range of the newspaper stocks we follow," says Merrill Lynch's Falco. TV station revenues dipped 4% in the third quarter "due to continued weakness at KOAT Albuquerque," an ABC affiliate, but radio revenues rose 13% and cash flow grew 43% above depressed year-ago results, the analyst continues. "We estimate that broadcasting operating income declined 10% in the quarter."

Given weaknesses at the Pulitzer TV stations for the rest of '89 and a "slowdown in revenue growth" at newspaper properties, Merrill Lynch has lowered its 1989 EPS from $2.05 to $1.98 and its 1990 projection from $1.65 to $1.60.

Westwood One a laggard?

In the network radio marketplace, Oppenheimer & Co. is projecting a fourth quarter loss for Westwood One of 30 to 35 cents per share. For the 1989 fiscal year ending Nov. 30, the Wall Street firm has revised the radio operation's loss from $1.40 per share to the $1.70-to-$1.75 range. For fiscal 1990, Oppenheimer notes, the loss should be cut to $1 per share.

Westwood One, whose third quarter operating loss was 35 cents per share versus a 6 cent profit a year ago, showed improvement in the radio ratings between the spring and summer books. Overall network revenues, meanwhile, rose about 20%, but Westwood One's NBC Radio jumped more than 35%, Oppenheimer notes. "The revenue gains are not up to the ratings improvement," the Wall Street firm observes, "but are better than in the first half."

Oppenheimer concludes, "The stock appears to have bottomed out but may remain a market laggard until investor confidence is rebuilt. We would defer purchase except for longer-term speculative accounts."

Eyeing Paramount's future

Tracking Paramount Communications Inc. after its failure to derail the Time Warner merger, Mabon, Nugent & Co. recommends accumulation of its shares "for the patient and risk-oriented investor who wants to share in the entertainment industry's consolidation and restructuring."

According to Mabon, Nugent's Raymond Katz, "There are four things that PCI can do over the near term: nothing (the least likely scenario), merge or acquire, restructure, be taken over." With a projected $3.2 billion in cash at year-end 1989, Katz notes, "Merger or acquisition is the likely route that [Paramount chairman Martin] Davis will pursue." However, Katz cautions that "the entertainment business is consolidating at an increasing pace" and that Davis has passed on acquisitions of Lorimar, in 1988, and United Artists, 1989, in association with MCA.

Oppenheimer's Dennis McAlpine says, Paramount is "running on [takeover] speculation and could retreat substantially if nothing materializes." He dismisses speculation that John Kluge or a Japanese company may bid for Paramount. "Since Kluge is the majority owner of Orion Pictures," he explains, "it is unlikely that the Justice Department would allow a merger of two major film distributors."

However, Mabon, Nugent's Katz predicts, "Of the seven original majors in the studio business, only three will remain independent: Disney, MCA's Universal and Paramount. And of these three, Paramount... may represent the most attractive mix of digestible size..., market leadership and saleable assets." As a result, he adds, Paramount "could soon begin to attract foreign or domestic interest in a purchase or merger." Among the possible suitors in his view are: The Big 3 U.S. TV networks, MCA, "various cable interests, not to mention such overseas companies as Rupert Murdoch's News Corp., Phillips N.V., Maxwell Communications and Japan's Dentsu, Victor Co., Mitsubishi Trading Co. and Fujisankei.

At Shearson Lehman Hutton, Kassan predicts, "At the end of the anticipated consolidation wave, we expect only five to eight major media/entertainment companies to remain."

FEEDBACK

What effect do TV critics' reviews have on the success of new syndicated programs?

"Minimal. If you look at the history of critics, they've brutalized TV down through the years. The way they rake most shows over the coals, there wouldn't be any TV [if the critics had great impact on viewers]. In theater, critics can kill a show. Critics also can have an impact on movies, but even there a film can be beat up by the critics and become a commercial success. . . It's easier for viewers to click on the TV and watch a while and decide for themselves. In some cases, you may get mixed reviews, so you can't give credit one way or the other [to the critics]. In fact, there's a theory that to get a good review means your show's so narrowly oriented, it won't work!"

Sheldon Cooper
President
Tribune Entertainment, Chicago

"I think they have a definite effect. The attention the critics give to a show creates added awareness, and it adds to tune-in. But whether a show is ultimately successful depends on the show. Reviews [can be considered] part of the marketing effort of a program. What they say does have some influence, and they can condition the viewer. For example, we have seen promotional efforts push up the ratings of a program. Nevertheless, the ultimate critic is the viewer. He has to make a decision day in and day out whether to view the program. We're past the day of the 'Least Objectionable Program.' As for negative reviews, I don't think a series of negative reviews can kill a show. In the final analysis, it's the quality of the program."

Robert Jacquemin
President
Buena Vista Television

"I have no way to measure it, but to judge by word of mouth, it appears that more people these days do seem to be reading reviews, or are at least cognizant of them. A good review appears likely to lead more people to sample a show. A poor review has the possibility of causing at least some people to ignore it."

Dick Cignarelli
Executive vice president, domestic distribution
MGM/UA Telecommunications

"I'd say the effect is minimal, on two counts. First, the reviews are not going to impact TV stations, because they've already bought the shows. Second, viewers make their own decisions based on what they like about the show."

Peter Lund
President
Multimedia Entertainment

"They have more effect on the trade than the audience. They have a very valid effect inside the trade on how one is perceived. . . In terms of audience draw, I think rarely do [reviews] lead to tune-out or lack of tune-in."

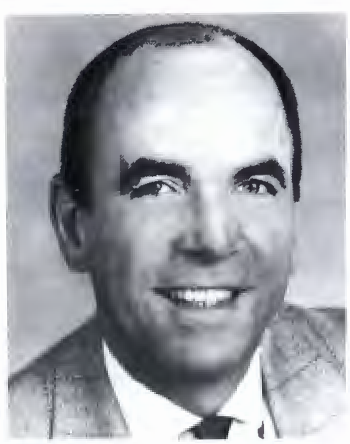
George Back
President
All American Television, New York

"Reviews, good or bad, can only help and not hurt programming viewership. A good review can make viewers aware of programs that they never considered watching, and bad reviews can be printed without running the risk of turning away loyal viewers."

Toby Martin
Senior vice president, program development and production
Viacom Enterprises

"To a certain extent, a television critic can either positively or negatively influence an audience. But the most important thing when launching a new program is letting the public know the program exists and where to find it. Therefore, even when faced with a bad review, the question often becomes, 'Is bad publicity better than no publicity?' I have enough confidence in the tastes and judgement of the public that, if I believe in a program, I don't really mind a bad review."

Gary G. Montanus
Senior vice president, marketing
Worldvision Enterprises Inc.



"Zero."

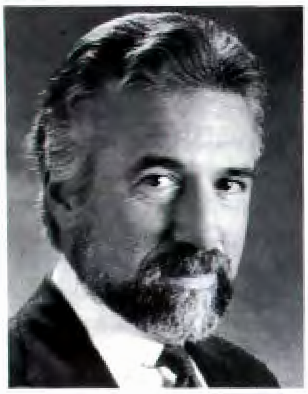
Dick Robertson
President
Warner Bros. Domestic Television Distribution

"We have always placed a high degree of importance on both print and electronic trade and consumer reviews of our syndicated series and specials. Reviews are a link with the viewers, our stations and Group W, and while they do vary depending on the type of production, they can enhance marketplace visibility. When combined with on-air promotion and support advertising, reviews can be an effective way of informing the public and generating tune-in interest. Reviews of our "Teenage Mutant Ninja Turtles," for example, were very helpful in differentiating it from the run-of-the-mill animated shows and pointing out its appeal beyond children's audiences."

Derk Zimmerman
President
Group W Productions

In the Picture

James A. Joyella



New president of TvB is a CBS veteran who has played a key role in the Bureau's key account program to develop new business and in TvB's new local market research project. He's bullish on prospects for national spot and confident that "Most of the audience erosion that's going to happen has already happened."

Joyella in for Moll at TvB at a time of multiplying challenges for free TV

Television Bureau of Advertising has had only four presidents before Jim Joyella: Ollie Treyz, Pete Cash, Roger Rice and Bill Moll. But outgoing president Moll says of Joyella, "This is the first time a member has been selected from TvB's own staff to step up to the presidency."

Moll also observes that Joyella "has been a key part of every new initiative we've taken since he joined us a year-and-a-half ago from CBS. Jim is taking over the helm at a time when TvB has never been needed more, to face the multiplying challenges to free, over-the-air television. Our industry is fortunate that Jim is such a consumate marketer."

As Joyella himself sees it, this is not a time of major change for the Bureau: "The need is to continue to concentrate on delivering the goods to our member stations." He adds that doing this "will continue to be a two-track approach, continuing to work to attract our traditional share of national advertising dollars for our stations while our regional territory managers work with our member stations locally to develop more regional and local business."

As a personal aside, he observes, "One advantage of moving up from staff here is that there will be no surprises: no surprises for our member stations who know what we've been doing and no surprises for me. I've already been doing it."

Key account program

Among the things Joyella has been doing is setting up the Bureau's key account program, organizing executives from television's rep companies into sales teams. These teams are focusing on the top 75 key accounts felt most likely to be productive. Moll credits this project alone with "bringing $200 million in new dollars to television stations that they would not have had without this project. And we can account for every nickel of it."

Joyella has also helped develop the force of top marketing managers working out of TvB offices across the country. They call on member stations in their territories and work with the stations' salespeople "to build task forces that identify and sell new accounts."

The next major new TvB initiative, unveiled at its mid-November convention in Los Angeles, is designed to encourage stations in medium and smaller markets to band together to support the type of research done in larger markets on media and shopping habits. Joyella says this project "is being ably handled" by Harvey Spiegel, who although "officially retired" as TvB senior vice president, research, has been setting up this ongoing research project, which will make available to member stations the retailing and media studies of Marshall Marketing and Nielsen's Ad Mix.

Two companies needed

The TvB board's research committee, headed by Lawrence Pollock, president of the eastern division of Capital Cities/ABC owned stations, invited major research companies to submit proposals, and four of the 10 companies that offered proposals were interviewed to narrow it down to Nielsen and Marshall. Spiegel explains, "We need two companies because Marshall is already working for exclusive clients in over 50 markets. In the markets each company goes into under TvB auspices, it will be working for all our member stations in the market. And each station will share equally in the benefits."

Marshall conducts telephone interviews asking consumers an extensive list of questions about their shopping and media habits. Nielsen already has the television viewing information, so in it's case Nielsen will be making callbacks to its viewing sample to get shopping habits and information on newspaper reading and radio listening.

Joyella is optimistic about national spot's prospects, "not only because of the networks' strong upfront showing again this year, but also because advertisers themselves at their own meetings have expressed the need for a new more balanced division of advertising and promotional dollars."

Asked about audience fragmentation, Joyella replies, "Most of the audience erosion that's going to occur has already happened. Cable has grown in recent years, but its rate of growth has started to plateau. Cable's growth is no longer what it used to be, and neither is free television's rate of viewer loss. With all cable's subscriber disatisfaction and disconnects, on top of all the homes cable passes that never have been connected in the first instance, cable is already suffering the problems of rapid aging—even though it's been around only a relatively few years compared to over-the-air television."

Joyella started with CBS Radio in 1969 as an account executive, and his posts with CBS before joining TvB in April 1988 as senior vice president, national sales, have included general sales manager with CBS Radio; vice president, marketing services for the CBS Television Network; vice president, CBS Television daytime and children's sales, and CBS Television Network vice president, marketing development.

WASHINGTON ROUNDUP

Congress returns to partisan stance as radio industry issues take stage

Now that legislation embodying codification of the fairness doctrine and requirements regarding children's programing have moved past the subcommittee stage in Congress, the communications body in the House appears to be getting back to normal, and that is not good for broadcast interests.

Before the FCC and the Reagan administration conspired, with the blessing if not the help of the broadcast industry, to challenge the authority of Congress on communications issues, the 15 Democrats and nine Republicans on the House Telecommunications Subcommittee generally split along party lines.

Nonpartisan. On fairness and many other issues on which the panel was at odds with the FCC, party distinctions became blurred. Even on the children's television issue passed by the subcommittee earlier this year, the panel appeared to be acting in a nonpartisan manner. But now that those two main priorities are over, it's business as usual.

The new stance became evident when the subcommittee held a hearing designed to show a congressional concern about the plight of AM radio and to put some pressure on the FCC to come up with some solutions to the various problems besetting that segment of the industry.

Radio efforts to get some reform in license-renewal procedures have long been stymied by the fact legislative proposals to do so also included the TV industry. This year, the National Assn. of Broadcasters decided to split the two segments and push for radio reform. Rep. Matthew Rinaldo (R-N.J.), ranking Republican on the subcommittee, introduced the measure for the NAB.

Most of the panel's GOP members apparently side with Rinaldo and the broadcasting industry, while most of the majority Democrats appear to side with Rep. Ed Markey (D-Mass.), chairman.

Markey raised the issue of radio reform legislation at the AM radio hearing. He announced he has "grave concerns about wholesale reformation of the comparative renewal process." It's all right to do something about correcting abuses of the process, he says, and still offers whatever legal authority the FCC needs to deal with them. But he pronounced the abuses already largely dealt with, citing FCC figures that no competing applications or comparative renewal challenges were filed against any of the 1,800 radio licenses that came up for renewal after the FCC took formal action last March to end abuses. "I am far from convinced that legislating significant changes in the renewal process is needed or warranted in the absence of significant evidence of abuse," he added.

Until now, FCC Commissioner James Quello has been publicly alone in his quest to get anti-trafficking rules restored in agency regulations. But Markey now suggests he may support adding such a rule to any radio reform bill that makes it through the subcommitee.

Women, minorities. He and other members also suggested that further amendments may be offered to deal with "opportunities for women and minorities as employees and owners of radio properties." No specific legislative remedies were offered for AM radio, the subject of the hearing. But Markey mentioned that "AM broadcasters still are waiting for AM stereo, and FM broadcasters increasingly express concern about the 'AM-ization' or technical degradation of the FM band because of increased interference."

In his first appearance as the new chief of the Mass Media Bureau, Roy Stewart offered no suggestions for legislative solutions. His hands on the issue were clearly tied, however, since the commission already had scheduled an en banc hearing on the AM issues, including the status of AM stereo, for Nov. 16.

Emergency broadcast stations may get earthquake assistance

The federal government may not be able to do much for broadcast stations that suffer from such natural disasters as Hurricane Hugo or the Lomo Prieta earthquake, but licensees designated as emergency broadcast stations may soon be in line for some special consideration.

Sen. Robert Packwood (R-Ore.), acting on behalf of Sen. John Danforth (R-Mo.), won an amendment to a package of legislation aimed at providing special federal aid to step up the study of earthquakes in the wake of the San Francisco-area quake and to fund methods for reducing the damage they cause.

Emergency broadcast. The amendment states that some of the $20 billion in funds added by the bill to current earthquake research efforts will be used in areas considered at high risk for an earthquake to "assess the emergency broadcast capability in such area to ensure that the capability can be sustained in the event of an earthquake and shall take into account the probable effects of earthquakes on the radio stations and broadcast towers that are designated as emergency broadcast stations in such area." Danforth had submitted a statement citing California, the Midwest, Eastern Seaboard, the Pacific Northwest, Utah, Alaska, and Hawaii as "probable sites for destructive earthquakes."

He suggested the impetus for the amendment came from KMOX radio in St. Louis, near the center of the largest quake ever recorded in the continental U.S., New Madrid, Mo. The station, the lead emergency broadcast system station in the area, reported in September that it "may be unavailable after an earthquake—precisely when people will need it most," Danforth said.

He noted the KMOX tower "sits on land that is likely to liquefy during an earthquake. If liquefaction

(Washington Roundup continued next page)

occurs, the tower will collapse. Where would the other emergency broadcast stations in the area turn for information?"

His amendment, he explained, would require federal agencies "to assess the adequacy of the emergency broadcast system in each high-risk area and to ensure that each area has a contingency plan in place and ready to go. The plan must consider the effects of an earthquake on the operating ability of radio stations and towers that are part of the local emergency broadcast system."

Cost to stations at issue in filmmakers' 'moral rights'

As it turned out, he and the rest of the broadcast industry don't have much to worry about, but Jonathan Klein, vice president and general manager of WJZ-TV Baltimore brought home to Congress the problem stations would face if the principle of "moral rights" were introduced into the U.S.

Congress has been holding hearings at the request of authors, directors, and others in the creative arts on the issue of adding moral rights to the U.S. Copyright Act. Moral rights, in theory, gives the creator veto power over the use of or changes in the work created. It could even extend to all the people who participate in a TV production, or a movie.

That, Klein told the Senate Copyright subcommitee, would mean that most TV stations in the country would have to have the

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telephone numbers of the directors of all the movies they want to show. Calls would have to be made to them to get permission to make changes for every daypart.

"We buy packages of 20, 25, 30 films," Klein said. "We run them in different dayparts. We run them in primetime, we run them all night, and we run them on weekends." Different dayparts require different considerations regarding community standards, he said, so changes have to be made in a film that is shown after midnight and again in the afternoon.

"We spent $6 million last year on buying syndicated products," Klein said. "I just don't see, unless I have every director's home phone number, every cinematographer's home phone number, how we could . . ." Chairman Dennis DeConcini (D-Ariz.) interrupted Klein to note that the syndicators, not the stations, would have to get approval for the changes Klein cited, adding, "it might cost you more . . . Isn't that really what you're talking about?"

Part of the argument is the economics, Klein acknowledged, but he added another is that the creators would tend to agree to something "that would fit all this country. What I worry about is the standards of Baltimore." He cited the movie, *Blazing Saddles*, as an example of a movie that required cuts he felt had to be made for Baltimore standards that might not have been made elsewhere.

At any rate, DeConcini and Sen. Orrin Hatch (R-Utah), the party leaders on the subcommittee, each said they were opposed, for now, to adding moral rights provisions to the copyright act.

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Washington Report

FCC gets down to cases in defining what's meant by 'obscenity,' 'indecency'

Al Sikes, FCC chairman, would like this page to be R-rated. It won't be, but an attempt will be made to satisfy his wish that the nation's TV and radio stations be informed of the language considered by the agency to be indecent to the point of being legally actionable.

Part of the problem the FCC faces is that its definition of what can be censored from the airwaves is different than the censorship allowed of all media by the U.S. Supreme Court, in spite of former Justice Potter Stewart's often-cited statement: "I can't define obscenity, but I know it when I see it."

"Obscenity" and "indecency" are different. The court has said material (not words) is obscene if "the average person, applying contemporary community standards, finds that the dominant theme of the matter or performance, taken as a whole, appeals to the prurient interest in sex; the matter or performance depicts or describes, in a patently offensive way, sexual conduct; and the matter or performance, taken as a whole, lacks serious literary, artistic, political, or scientific value."

As a legal term, "indecency" is considered less onerous. While obscenity can be banned from all media, indecency can be banned only from the broadcast spectrum. The FCC definition draws on the obscenity definition to describe indecency as "language or material that, in context, depicts or describes, in terms patently offensive as measured by contemporary community standards for the broadcast medium, sexual or excretory activities or organs."

Unsupervised children

The U.S. Appeals Court has upheld that definition, but has disputed the part of FCC regulations that say such material may not be broadcast when "there is a reasonable risk that unsupervised children may be in the audience." The FCC has begun a "notice of inquiry" to supply justification for a 24-hour ban of such material, as commanded by Congress last year. In addition, the court has been asked to reconsider its remand decision.

As clear as the Supreme Court's definition of "obscenity" is supposed to be, there continues to be a steady stream of cases taken to court to decide obscenity long after the definition was handed down in Miller vs. California in 1973.

Thus, the FCC faces an even more formidable task in trying to tackle just what is "indecent." Under pressure from Congress, however, the Sikes FCC is attempting to do so, sweeping through a two-year backlog of complaints, settling on four to be fined for violations and four to be given a chance to respond before a final decision is made.

Notified through a "notice of apparent liability" that they are considered by the FCC to be guilty and subject to a fine were: WIOD Miami, $10,000; KFI-AM Los Angeles, $6,000; and WZTA-FM Miami and KLUC-FM Las Vegas, fined $2,000 each. The other four were given 30 days to explain away transcripts of allegedly indecent programming they aired. The four were: KCCL-AM-FM Paris, Ark.; KSD-FM St. Louis; WWWE-AM Cleveland; and WXRK-FM New York. Although the agency had to dismiss 51 complaints on various technicalities such as lack of proof, another 21 were dismissed because the complaints referred to material the agency decided did not meet the legal standard of indecency.

Some of the difficulty in deciding what is and is not "indecent" under federal standards is apparent in the letter from the FCC to WIOD notifying the station that it is being fined $10,000 for material it aired on *The Neil Rogers Show* during the last two months of 1988.

In September, the station responded to accusations brought by a listener that the shows were indecent. As the FCC letter to WIOD states, "Except for the five broadcasts described in the preceding paragraph, we agree with your assertions that Mr. Thompson's allegations of indecency fail to establish a basis for commission action." But five broadcasts were suspect.

Reading the fine line

The fine line is then laid out in the letter's next four paragraphs: "You deny that the 'Butch Beer Commercial' contains descriptions of sexual or excretory activities or organs. It appears to us, however, that the references to sexual activities are clear...

"You argue, with respect to 'Candy Wrapper,' that the sexual innuendo is indirect and therefore not capable of only one clearly sexual meaning. It appears to us, however, that notwithstanding the use of candy-bar names to symbolize sexual activities, the titillating and pandering nature of the song makes any thought of candy bars peripheral at best. Thus, we believe the song's description of sexual activities is the primary focus and your claim of ambiguity has little merit.

"You argue that 'Jet Boy, Jet Girl' is not indecent because, while its subject matter of homosexuality is clear, its description of sexual organs and activities is no more than innuendo and cannot therefore be patently offensive. It appears to us, however, that the language in the attached transcript makes clear references to sexual activities in a way that is patently offensive, even if the song's homosexual theme were ignored or changed...."

The FCC then rejected WIOD's arguments that the agency allowed other stations to air some of the same material, that "the material at issue here is less graphic, vulgar and lewd than that found to be indecent by other commission decisions to be used as guidance," and that "WIOD material uses 'acceptable, commonly used slang, not the more offensive and vulgar slang previously found to be indecent.' Finally, you argue at some length that 'contemporary community standards for the broadcast medium,' as evidenced by, among other things, the popularity of *The Neil Rogers Show*, support your conclusion that the subject material is not patently offensive, but rather is widely accepted."—**Howard Fields**

MAJOR BROADCAST MEETINGS, SEMINARS AND CONVENTIONS

1989

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
February 28–March 3	Country Radio Seminar, Opryland Hotel, Nashville
March 31–April 3	National Association of Broadcasters, Atlanta March 26 Issue
April 1–3	Cable Television Advertising Bureau Convention, Marriott Marquis, New York
April 20–25	MIP-TV, Cannes France April Television/Radio Age International
May 9–15	Golden Rose of Montreux Festival, Montreux
May 19–22	CBS-TV Annual Affiliates Meeting, Century Plaza, Los Angeles May 7 Issue
May 21–23	National Cable Television Association Convention, Atlanta Convention Center
June 3–6	NBC-TV Annual Affiliates Meeting, Washington, D.C.
June 12–14	ABC-TV Annual Affiliates Meeting, Century Plaza, Los Angeles June 4 Issue

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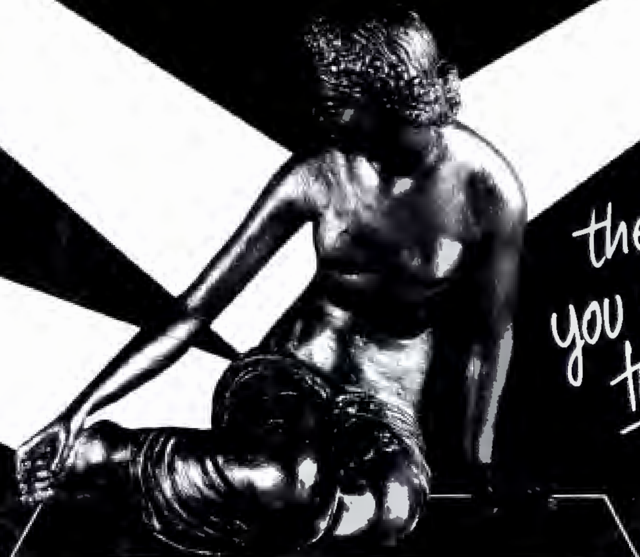

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