

MEDIAWEEK

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NEWSPAPER



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Media buyers see few breakout contenders for new prime-time season **PAGE 4**

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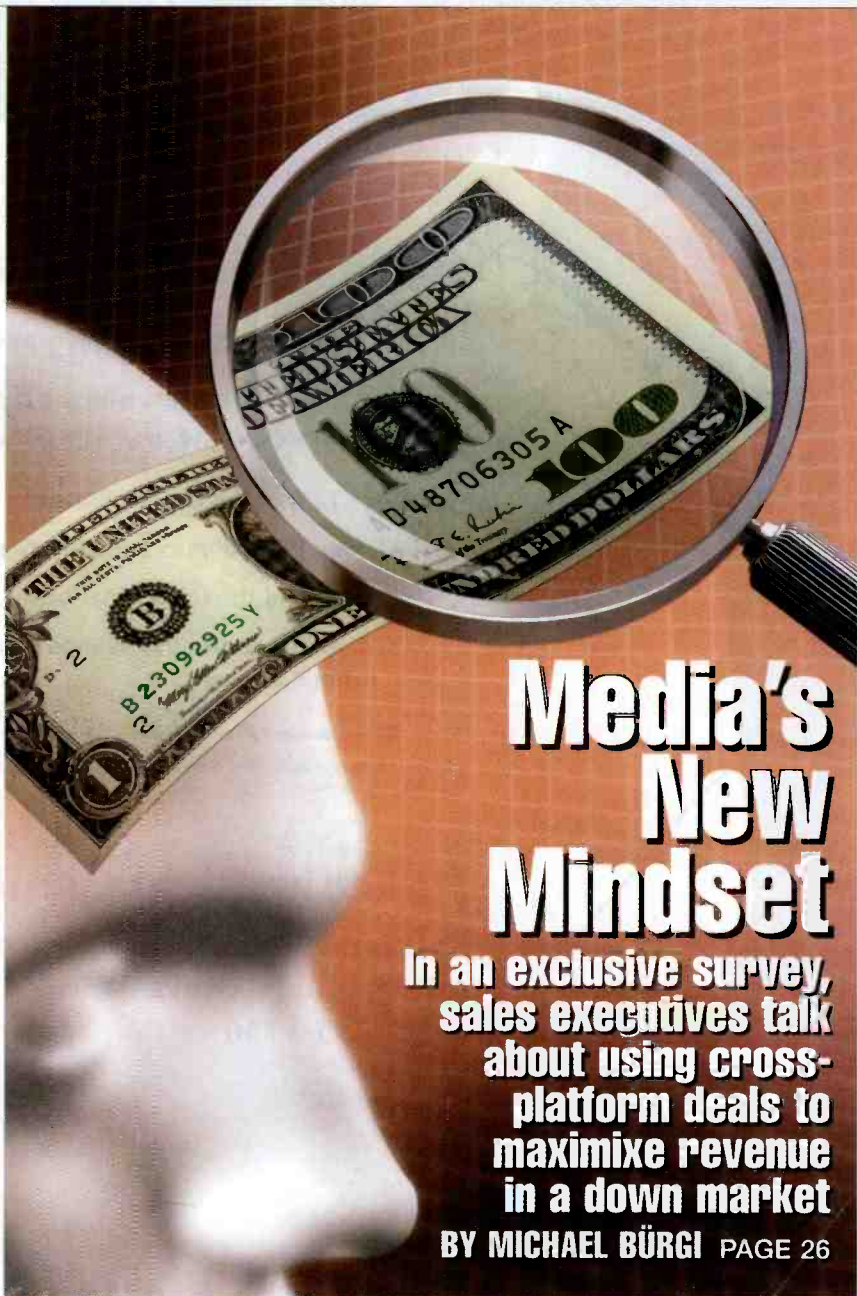
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Carat's \$400 million will go under microscope

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Media's New Mindset

In an exclusive survey, sales executives talk about using cross-platform deals to maximize revenue in a down market

BY MICHAEL BÜRGI **PAGE 26**

MARKET INDICATORS

NATIONAL TV: BUSY

Buyers will be busy this week watching pilots of new shows and doing share estimates in preparation for upfront, expected to begin after Memorial Day.

NET CABLE: PAUSED

Cable sales were largely on hold last week as most media buyers attended broadcast upfront presentations. Scatter is strong going into third quarter, as beverages and movies continue to spend.

SPDT TV: STEADY

The rebound continues, as June inventory is filling up in major markets. Retail chains are spending more, along with telecom, banking, automotive and movies.

NEWSPAPERS: BUILDING

Year-to-year lineage declines are leveling out, but publishers still foresee a slow, second-half recovery. Retail is turning positive in some parts of the country, but help-wanted is still dragging down results.

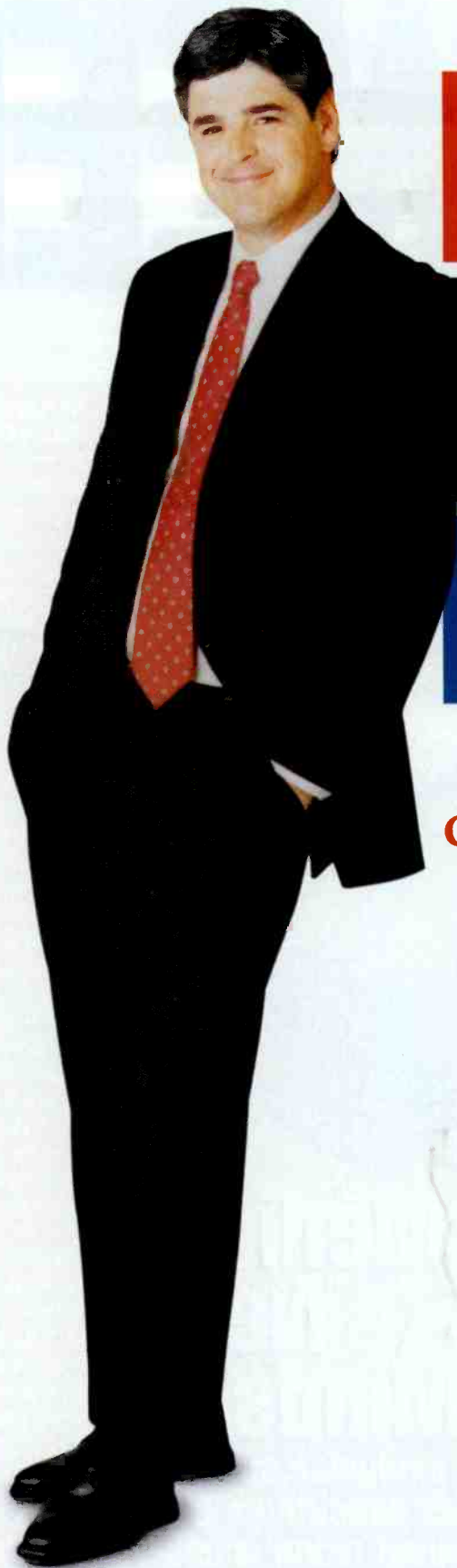
MAGAZINES: MIXED

While spending in luxury category continues to lag, high-end auto and designer apparel brands are solid in upscale men's and women's fashion/beauty titles.



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*Source: Arbitron Nationwide Fall 2001, Persons 12+, Mon-Sun 6am-12mid, AQH Persons.

** Source: Arbitron Fall 2001, Metro, AQH Share, Adults 25-54 among Affiliates on for the entire survey period.

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At Deadline

■ UPDEGROVE LEAVES *NEWSWEEK*

Mark Updegrove, U.S. publisher of *Newsweek*, left the company last week. Updegrove, a longtime Time Inc. executive, had been president of Time Canada prior to joining the Washington Post Co. title last June. "We both came to the same conclusion that the position wasn't moving in the right direction for him," said Greg Osberg, executive vp/worldwide publisher of *Newsweek*. One *Newsweek* insider noted that Updegrove handled U.S. ad sales and had sought additional responsibilities. A replacement has not been named. *Newsweek's* ad pages are up 3.7 percent this year to 654 through May 20, according to the *Mediaweek* Monitor; rival *Time* is flat at 838 pages.

■ TV GUIDE PARTNERS WITH COMAG

TV Guide Magazine Group, a subsidiary of Gemstar-TV Guide International, and Comag Marketing Group (CMG), a joint venture of Hearst Magazines and Condé Nast Publications, last week agreed to a partnership for newsstand sales and marketing. The deal, effective in July, folds TV Guide Distribution Inc.'s clients into CMG. Clients include the 9 million-circ *TV Guide*, as well as McGraw-Hill's *BusinessWeek* and titles from Emmis Publishing and Weider Publications. About 140 TV Guide staffers will be affected, though some will get positions with Comag. "CMG's proactive efforts to better define responsibilities throughout the newsstand supply channel, we feel, will ensure *TV Guide* a stable position in an unstable newsstand environment," said John O'Reilly, president of the TV Guide Magazine Group.

■ SONICBLUE WINS REPRIEVE

SONICblue, maker of the ReplayTV 4000 digital video recorder that lets consumers automatically skip TV commercials, last week won a temporary reprieve from a magistrate's order to monitor its customers' viewing habits. On June 3, the U.S. District Court in Los Angeles will scrutinize the initial magistrate's order. Television networks want the court to forbid the sale of SONICblue's device, arguing that its commercial-skipping device violates their copyrights (*Mediaweek*, May 13).

■ DISCOVERY FINDS NEW PRESIDENT

Miramax Television chief Billy Campbell will replace Jonathan Rodgers, who left in March, as president of Discovery Networks U.S. in June. Campbell will oversee 11 analog networks, including Discovery, TLC, Animal Planet, Travel Channel and many digital services. Though Discovery's documentary

programming style is relatively new territory for him, Campbell said he has been a loyal viewer. Campbell has worked for ABC, Warner Bros. Television and CBS Entertainment and helped develop *China Beach*, *ER* and *Everybody Loves Raymond*. Also at Discovery, CNN producer Vivian Schiller was named president of the Discovery Civilization Channel.

■ MEDIAEDGE:CIA PROMOTES THREE EXECS

Media buying and planning agency Mediaedge:cia has restructured its New York management team. Jeanne Tassaró, formerly executive vp, director of print services, was promoted to managing partner, general manager of New York. Lee Doyle, most recently executive vp, media director, was named managing partner, client services. Also, Barbara Cipolla, formerly executive vp, media account director, was promoted to managing partner, new business. Doyle and Cipolla will report to Tassaró.

■ ADDENDA

The AOL division of AOL Time Warner late last week said it is laying off 100 of its 725 interactive marketing department employees, which includes ad sales staffers... **Campbell Mithun** picked up H&R Block's \$100 million media buying business... **Adelphia Communications CFO Timothy Rigas** resigned last week a day after his father and company founder John Rigas stepped down as chairman of the sixth-largest U.S. cable operator. The exits come as **Adelphia** is under investigation by Securities Exchange Commission for \$2.3 billion in loans made to the Rigas family... **Bob Costas** signed a multiyear contract renewal with NBC, said to be worth more than \$1 million per year for four years. Costas will continue to host NBC's Olympics coverage and will take on 15 or more assignments each year for **NBC Sports**... **The NBA playoffs** on NBC through the first 20 games averaged a 4.3 rating/11 share, up 2 percent over last season, while ratings on Turner cable nets TNT and TBS through 34 games were a 2.4/4, up 9 percent... **Viacom's** integration of UPN with CBS, which began in January, resulted in the company charging \$6.7 million against severance liability and \$400,000 against lease termination after three UPN offices were closed... **The Broadcast Protection Discussion Group**, which is devising a way to prevent piracy of digitally broadcast TV signals, began circulating the final draft of its proposal and plans to release a final document on May 31... **Katherine O'Hearn**, executive producer of CNN's *American Morning With Paula Zahn*, said she will leave the show in June.



**INSIDE
MEDIaweek**

Jimmy Kimmel is a hit at ABC's upfront presentation
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Few Hits Seen From New Lineups

Networks' fall prime-time schedules come up short with most buyers; the WB's slate gets best reviews

TV PROGRAMMING By John Consoli

The early reviews of the broadcast networks' fall prime-time schedules are in from media buyers, and aside from generally positive buzz for the WB, the nets earned middling grades for last week's presentations of their new programming. Buyers said that CBS and ABC have one new series each that has strong hit potential, but few other new entries scheduled by the Big Six networks received "can't miss" grades.

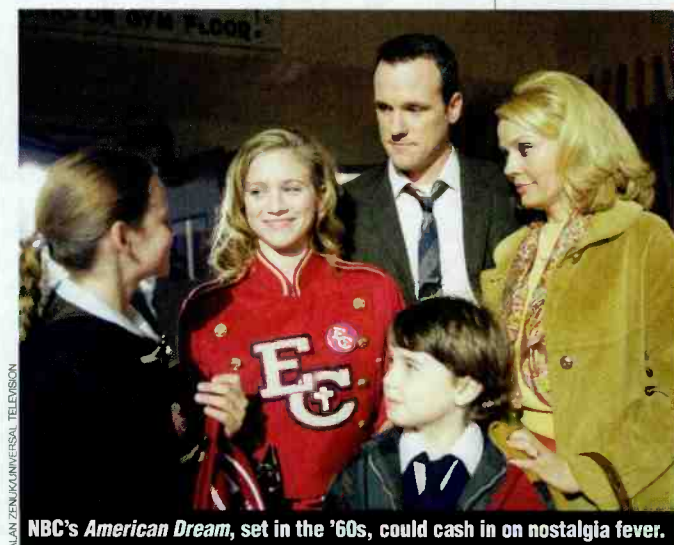
While buyers regard most of CBS' five new dramas as being very dark in tone, they generally praised the quality of the shows' casts and production. The spinoff *CSI: Miami* should make the network's already strong Monday night even more formidable, many buyers said.

On ABC, *Eight Simple Rules for Dating My Teenage Daughter*, starring John Ritter, is expected to successfully lead off the network's new two-hour Tuesday comedy block.

Ratings leader NBC, which will add just 3½ hours of new shows, picked up some positive notices for nostalgia drama *American Dream* (Sunday, 9 p.m.). UPN was praised for adding two sci-fi dramas, *Haunted* (Tuesday, 9 p.m.) and *The Twilight Zone* (Wednesday, 9 p.m.) that could mesh well with veteran lead-ins *Buffy, the Vampire Slayer* and *Enterprise*, respectively.

But other than those few potential bright spots, media buyers, most of whom would not speak for attribution, were underwhelmed by the networks' new slates. Buyers were most critical of the 7½ hours of new programming on Fox (the most for any network), and most also said that ABC's schedule does not appear to contain enough solid new series to turn the network's disastrous ratings picture around.

Conversely, the WB's fall schedule, which features four hours of new programming, got a virtually unanimous thumbs-up from buyers. "The WB schedule was very strategically de-



NBC's *American Dream*, set in the '60s, could cash in on nostalgia fever.

veloped to reach its 12-34 target audience," said John Rash, chief broadcast negotiator at Campbell Mithun. "Most important, they may have finally found a strong lead-out for *7th Heaven* in *Everwood* [Monday, 9 p.m.]"

In addition to *Everwood*, the WB's new Friday 8 p.m. sitcom, *What I Like About You*, was mentioned by many buyers as a potential hit.

Buyers were divided on which, if any, of CBS' new dramas other than *CSI: Miami* might work. Several said that *Without a Trace* (Thursday, 10 p.m.), which will follow the original *CSI*, has the best chance for success.

Aside from *Eight Simple Rules*, none of ABC's new prime-time series generated much positive buzz. But buyers were impressed with Jimmy Kimmel, whose comedy/variety show will succeed the canceled *Politically Incorrect* in ABC's midnight time slot. Kimmel's comedy routine at ABC's upfront presentation last Tuesday had buyers rolling in the aisles.

Buyers were surprisingly outspoken about their disappointment with most of Fox's new shows, although executives of some Fox affiliate

stations and some of the network's key advertisers were kinder. "Is this the best schedule they could come up with in order to turn around their ratings problems? God, I would have hoped not," said one top buyer. Fox's ratings among adults 18-49 are down more than 10 percent this season.

Since David E. Kelley did not have any clips to show of his new drama, *Girls Club* (Monday, 9 p.m.), buyers could not make any solid observations other than saying that based on Kelley's success with *Boston Public*, *Girls Club* could do well following that show on Mondays.

Fox's four other new dramas—*Fastlane*, *Septuplets*, *Firefly* and *John Doe*—were panned by most buyers. "I have to wonder what they were thinking with these," said a buyer who reflected the opinions of many others interviewed after Fox's presentation last Thursday. "It's not the schedule I believe is needed to turn the network around."

Negative buyer sentiment bubbled up at one point in Fox's presentation as the audience broke into laughter when it was announced that Tiffani Thiessen (*Beverly Hills, 90210*) would play the chief of a team of undercover cops in *Fastlane*. Fox Entertainment president Gail Berman quickly asserted to the audience that the casting was not a joke. (Another Fox executive later said that the network plans to add a new character to *Fastlane* who will play Thiessen's character's boss.)

Executives of Fox affiliate stations, including Meredith Broadcasting president Kevin O'Brien, were generally upbeat about the network's slate. And an executive of Taco Bell, which spent \$90 million on the network this past season, also praised the schedule. Debbie Meyers, Taco Bell vp of media, entertainment and licensing, said: "I'm very happy with their development. We are looking for the 18-34 audience with programming that is different from the other networks, and Fox has done that." Meyers singled out *John Doe* (Friday, 9 p.m.) as a show with particular promise.

Buyers will spend this week reviewing pilots of the new shows and doing audience share estimates in preparation for upfront buying, which is not expected to begin until after Memorial Day.

Two pre-upfront mega-deals that buying agency OMD has been negotiating with Via-

com and Walt Disney Co. have not gone through. OMD's talks with Viacom are dead, according to CBS sales chief Joe Abruzzese, who said the parties could not agree on terms. OMD director of national broadcast Dan Rank said that the agency was at an impasse with Disney but that talks on a deal, reported to be worth \$1 billion, could resume this week.

NBC was the first network to do upfront business last year. The network agreed to mid-single-digit cost-per-thousand cutbacks, setting the tone for the rest of the networks in what became a negative upfront. This year, NBC is expected to seek low-double-digit CPM increases, based on its ratings strength this sea-

son. Buyers will probably compromise with NBC at mid-to-high single-digits bumps, and the market will begin to move.

The WB, also a traditional early dealmaker, is also expected to seek close to double-digit CPM increases, despite some ratings shortfalls this season. So far, buyers seem to be "buying" the WB's excuse that the loss of *Buff, the Vampire Slayer* from its schedule was a major factor in the network's overall ratings decline.

CBS is also expected to do well. "If CBS plays its cards right, it should get better rates and take in more money than last year," said one buyer. On the flip side, the buyer added, CBS' "new cops-and-robbers dramas might

not be viewed as content-friendly." Buyers said UPN will be helped by its closer management ties to CBS, with combined sales staffs making it easier to flow some dollars between the nets.

Even with the criticism of Fox's new shows, buyers noted that the network still has four solid nights and strong 18-34 numbers. Despite its sharp ratings decline this season, Fox could come in flat with last year's upfront, buyers said.

While buyers are unanimous that ABC will suffer declines in this year's upfront, the big test will be to see just how strongly advertisers support the network's new family-oriented programming, something for which many advertisers have been clamoring. ■

Vertical Supply Tightens Race

20th's lead shrinks, though integration is making studio tally less significant

For the fourth straight year, 20th Century Fox Television will remain the top supplier of prime-time network programming when the season begins this fall, with 19 new and returning shows, down from 24 last season. Runner-up Warner Bros. Television has 18 series on the new prime-time schedules, up from 13 last season.

With the gap between the top two suppliers so narrow this year, the battle for bragging rights left some executives in Hollywood with bruised egos. On the record, studio executives claimed to prize quality over quantity and called for an end to

scorecarding. And they have a point—vertical integration between the studios and the networks has blurred the lines of competition. But privately, there were grumblings that 20th attached itself at the 11th hour to Universal Television's family comedy *The Grubbs* (on Fox) to retain its No. 1 perch.

A spokesman for 20th denied that the studio muscled in on the show. But *The Grubbs'* plum time slot (Sunday at 9:30 p.m., following *Malcolm in the Middle*) and 20th's attachment to it underscores the growing influence of corporate synergy on network scheduling. The post-*Malcolm* berth is one of Fox's most coveted slots; a failure by Fox and 20th to benefit from the filling of that time period would be financially unsound.

As further proof that all roads lead to vertical integration, six of Fox's eight new series are from 20th. A seventh, *John Doe*, is from Regency Television, which is housed at 20th. Meanwhile, 20th landed only one new show, the CBS comedy *Still Standing*, on a nonaffiliated net.

For 20th presidents Dana Walden and Gary Newman, targeting Fox's schedule was an imperative. "We spent a fair amount of time assessing all the schedules. When we looked at Fox, not only was it corporately a good thing to provide them with some choices, but there was a fair amount of need for new shows," Newman said.

With network and studio coproductions on the rise, it's no surprise that CBS Productions came in third this year, with 15 new and returning series (up from 12 last year). Disney's Touchstone Television landed 12 series, with all seven of its new shows on ABC.

Touchstone's three new comedies will air on Tuesdays before *NYPD Blue* at 10 p.m., leaving *Blue* creator Steven Bochco less than pleased. "There's no question that when you have some support, you do better," Bochco said. "I can't remember the last time we had anything that gave [*Blue*] a worthy lead-in."

Of all the major studios, WBTV landed the most new series on the widest swath of networks outside of corporate sibling the WB (where it placed three): two on CBS, one



20th took a stake in Universal's *The Grubbs*, with Randy Quaid.

on Fox and one on NBC. "I've always wanted this studio to become the dominant supplier for the WB, while retaining our position as a strong player in regard to all the networks," said WBTV president Peter Roth.

In the most surprising development of the season, Universal Television (formerly Studios USA) landed four new series on the networks, with six shows returning. It's the studio's biggest output since 1994. As one of the few so-called "independent" studios remaining in Hollywood, it is perhaps less surprising that two of Uni's new series are coproductions (*The Grubbs*, with 20th, and NBC's *American Dreams*, with NBC Studios).

Although Universal president of programming Sarah Timberman confirmed that *The Grubbs'* coproduction deal with 20th was a "late conversation in the process," she said it was an equitable agreement, in which Universal retains worldwide distribution rights. "I think Fox appreciated our need for a deal with many strategic advantages," Timberman added. "The end result is completely acceptable to both parties, [which] suggests there are many ways in which coproductions can be struck." —Alan James Frutkin ■

THE FALL 2002 SCORECARD

STUDIO	NEW SERIES ON NETWORKS	TOTAL SERIES ON NETWORKS
20TH CENTURY FOX TV	7	19
WARNER BROS. TELEVISION	7	18
CBS PRODUCTIONS	6	15
TOUCHSTONE TELEVISION	7	1
UNIVERSAL TELEVISION	4	10
PARAMOUNT NETWORK TV	3	
NBC STUDIOS	4	8
BIG TICKET TELEVISION	2	4
DREAMWORKS TELEVISION	2	
REGENCY TELEVISION	1	3
VIACOM PRODUCTIONS	1	3
COLUMBIA TRISTAR	0	3
DOMESTIC TELEVISION		

NBC Remains Network to Beat After 3d Sweeps Week

NBC and CBS continued to run first and second respectively in household ratings, adults 18-49 and total viewers through the first three weeks of the May sweeps.

Through May 16, NBC was the households leader with a 9.2 rating/15 share, up 8 percent over the same period last May. CBS followed with an 8.4/14, down 6 percent. ABC was third with a 6.0/10, down 18 percent; Fox was at 4.8/8, down 13 percent; the WB averaged a 2.8/5, up 12 percent; and UPN recorded a 2.6/4, up 4 percent.

Among viewers 18-49, NBC was the leader with a 5.2/12, up 10 percent from the same period last May, followed by CBS at 4.1/12, down 2 percent. Fox was next with a 4.8/8, down 15 percent, while ABC was fourth with a 3.8/11, off 11 percent. The WB and UPN both scored a 1.8/5 in 18-49, up 6 percent and 13 percent respectively.

NBC's strong sweeps performance has been helped by last Thursday's season finales of *Friends* and *ER*, the network's 75th anniversary special and stronger ratings for the three *Law & Order* shows and *The West Wing*.

In total viewers, NBC averaged 14.1 million a night, up 14 percent. The network's closest competitor, CBS, was flat with last May, at 12.9 million.

The sweeps end this Wednesday, May 22, the last official day of the prime-time season. —John Consoli

FCC Imposes One-Year Digital Deadline on Stations

Television stations could have as little as one more year to make the transition to digital broadcasts or risk eventually losing their licenses, the Federal Communications Commission warned last week. More than 800 broadcast TV stations missed the May 1 deadline to transmit digital signals; those that make little further progress will be subject to new sanctions that the FCC approved last week.

Stations behind on DTV can obtain up to two six-month extensions, but they must report on (continued on page 8)

Hispanic Nets Hike Profile

NBC, Nielsen help Telemundo and Univision chase mainstream advertisers

NETWORK TV By John Consoli

Far from worrying about the corporate competitive clout that rival Telemundo will enjoy following its acquisition by NBC last month, Univision believes that both Hispanic networks will benefit because of an expected influx of mainstream advertisers into the Spanish-language TV marketplace.

"If NBC brings an advertiser in who becomes committed to the Hispanic marketplace, we believe we can eventually get them to advertise with us, just like Telemundo benefits from the clients we bring in," said Dennis McCauley, co-president of Univision ad sales.

James McNamara, president and CEO of Telemundo, agreed that any new advertisers steered into the Hispanic marketplace will also look at Univision. "Our goal is to try to get as many of the 300 or so advertisers that are on NBC right now that are not advertising on Telemundo," said McNamara, who added that a realistic target over the next few years would be about 100.

Telemundo, which has about 100 advertisers overall, has seen that number double in the last three years. Univision also totals over 100 different advertisers but takes in a larger portion of ad dollars—about 75 percent of the market to Telemundo's 25 percent.

The networks also are expected to be helped by Nielsen Media Research's announcement last week that it plans to change its National Television Index methodology to reverse the undercounting of Hispanics in its sampling. This would in turn increase the ratings of all Hispanic TV programming, meaning the networks could charge more.

Both networks held their upfront presentations last week, and while Univision president



Univision has *Quien Dijo Miedo?* ready for fall.

Ray Rodriguez would not make projections, media buyers said Univision will probably take in about \$525 million in this year's upfront. Telemundo is expected to garner about \$200 million. Univision and Telemundo officials believe pharmaceuticals, technology and automotive are ripe categories. While each gets some auto ads, it is just a small portion of their overall dollars. Also, each gets virtually no drug ads. "The Hispanic audience over-indexes for health problems such as high blood pressure, cholesterol and diabetes, yet we get very few ad dollars from the drug companies," said Univision's McCauley.

With a fairly stable returning schedule, the biggest change on Univision was the introduction of five new novellas; a new two-hour *Fear Factor*-type game show, *Quien Dijo Miedo?* (Who's Afraid?); and an hour comedy *Playa Tropical* (Tropical Beach.)

Telemundo will air six new novellas; a new reality series, *Protagonistas de la Musical* (Music Stars); and a Hispanic version of *Temptation Island*, the Fox reality show of the past two seasons, produced for Telemundo by Fox Television Studios. ■

Rainbow Tries Cross-Sales

In a first, Bravo, AMC, WE and IFC to be programmed and pitched in tandem

CABLE TV By Megan Larson

S spurred on by the fact that it is slowly but surely expanding its advertising avails, Rainbow Media is putting the final touches on its first-ever cross-network ad package, to be sold in the upfront this year.

The new offering includes ad buys on Bravo, AMC, WE: Women's Entertainment and

IFC, all of which will take part in an overarching Women + Film programming initiative that is set to premiere in April 2003.

"Advertisers that we've talked to have expressed an interest in reaching women with a particular voice," said Arlene Manos, president of Rainbow National Networks Advertising

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Media Wire

their progress or face possible fines. After a year, the FCC could yank their digital construction permits; since digital is all that will be left once TV leaves the analog spectrum, that would amount to a death sentence.

"If stations think [FCC] commissioners are going to blink on this, they're wrong," Ken Ferree, chief of the agency's Media Bureau, said last week after FCC voted in favor of the new rules. So far, the FCC has granted requests to about 580 stations for extensions to convert to digital and has told roughly 300 others that it wants more information. The sanctions clock would begin once the FCC denies a waiver request. Stations seeking a delay may plead financial hardship or circumstances beyond their control.

A spokesman for the National Association of Broadcasters said the group considers the new sanctions "reasonable." —Todd Shields

VH1 Program Chief Graden To Focus on Broad Audience

MTV programming chief Brian Graden added struggling VH1 to his purview last week, getting the new post of president of entertainment, VH1 and MTV. Graden said VH1 will continue to "go after the eyeballs of anyone who likes music."

VH1 will seek to program reality series and documentaries, Graden said. For now, Graden added, he will lay off creating more scripted programming, which has increased on VH1 in the last two years. Movies, both theatrical and original, will remain a part of the network's schedule, he said.

While some industry observers say that Graden's new posting could mark the "MTV-ification" of VH1, Graden disagreed. The network's brand is solid, but its content has been lacking, he acknowledged.

VH1's ratings have declined significantly this season in delivery in households and key demographics, and the network has struggled to target both twentysomething graduates of MTV and their parents.

Fred Graver, VH1's current executive vp of programming, will now develop independent projects for the network as an executive producer. —Megan Larson

Sales about the news ad package. "We think vertical integration surrounding a theme is particularly meaningful to advertisers."

The Women + Film ad sales package/programming road block grew out of an AMC special *Reel Women*, which focused on the major influence women had in Hollywood in the 1910s and 1920s, said Katie McEnroe, president of AMC/WE.

Each network will devote a separate week in April to women's accomplishments in the business. Bravo will air episodes of *Inside the Actor's Studio* profiling actors like Meryl Streep and run their films. WE's *Cinematherapy Week: Women in the Movies* will spotlight female actors, and IFC will air a *Chick Flicks* block devoted to films by female directors such as *Girlfight* (Karyn Kusama). Lastly, AMC will devote original series like *Backstory* to films featuring strong female characters. A similarly themed documentary or specials could also air across all four networks during April.

"If we can take it [ad buys] further into specific passions that target a type of women, then we cut out the waste, and we like that," said Lisa Donohue, senior vp, strategy director for Starcom. Rainbow is looking to sell the package to three category-exclusive sponsors. The deal includes on-air and online inventory, tune-ins and positions in TV, print and radio promos.

As a network group, Rainbow has lagged behind media behemoths such as AOL Time Warner and Viacom in selling ads across platforms.

But multi-Rainbow network deals may attract more attention as its services become better distributed and increasingly ad supported.

AMC—the only fully-distributed Rainbow service, with 83 million homes—recently announced it will accept more advertising. At the same time, WE is entering the marketplace for the first time this year with 46.5 million subscribers. Bravo has 65 million subscribers, and IFC, which doesn't take spots but will offer sponsorships, is now available in 24 million homes. According to Rainbow's analysis of MRI data, only 23 percent of each network's audience is duplicated on sibling services.

"Though small, these networks are focused; and by combining four channels in this deal, Rainbow is taking one step further toward becoming more relevant to advertisers," said Starcom's Donohue. ■



Rainbow's Manos has new inventory to sell.

Hyundai May Audit Carat

AGENCIES By David Kaplan, *Adweek*

Hyundai Motor Co. is reviewing independent media-auditing firms to oversee its combined \$400 million Hyundai/Kia U.S. media-buying business, handled by Aegis Group's Carat Los Angeles, said sources with knowledge of the review.

The search for such a large assignment signals that independent auditing of media buying shops—which happens often in Europe but is rare in the U.S.—may start to occur more frequently, said agency executives. The review is being conducted by the Korean automaker's newly formed World Marketing Group, which was created to oversee the performance of its media shop, Aegis Group's Carat Los Angeles.

A Hyundai representative denied any knowledge of a review but said, "Carat has said it can produce certain benefits over our previous media buying agency, and we want to monitor that to see if the benefits exist."

San Francisco-based Hawk Media; Advantage Media of Lakewood, Colo.; Media Management in St. Louis; and Denver-based MediaAnalysis Plus are being considered, said the

sources. A decision is expected by the end of June. The company plans to contract with the review winner for one year and will most likely seek quarterly audits, sources said. In addition to ensuring that Carat is following through on its pricing guarantee, the audit will examine audience delivery, as well as Carat's billing processes and other expenses.

Carat and the review contenders were unavailable for comment.

When Carat won the business in January, the agency promised the client savings in excess of 10 percent above what Hyundai/Kia was getting from its former media shop Bates. Major clients regularly audit the buying performance of their media resource internally. Because WMG is still in the formative stage and lacks the capabilities to assess Carat's buying, Hyundai/Kia executives may believe an independent auditor is needed, sources said.

"Media buying has become so complicated, it really can't be checked independently by most clients," said Charles Courtier, CEO of WPP's Mediaedge:cia. —with Rebecca Flass ■

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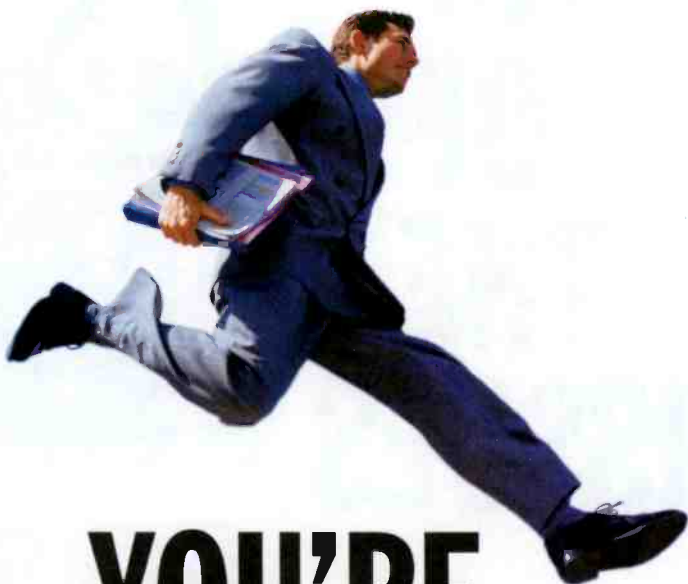
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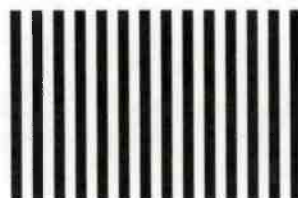
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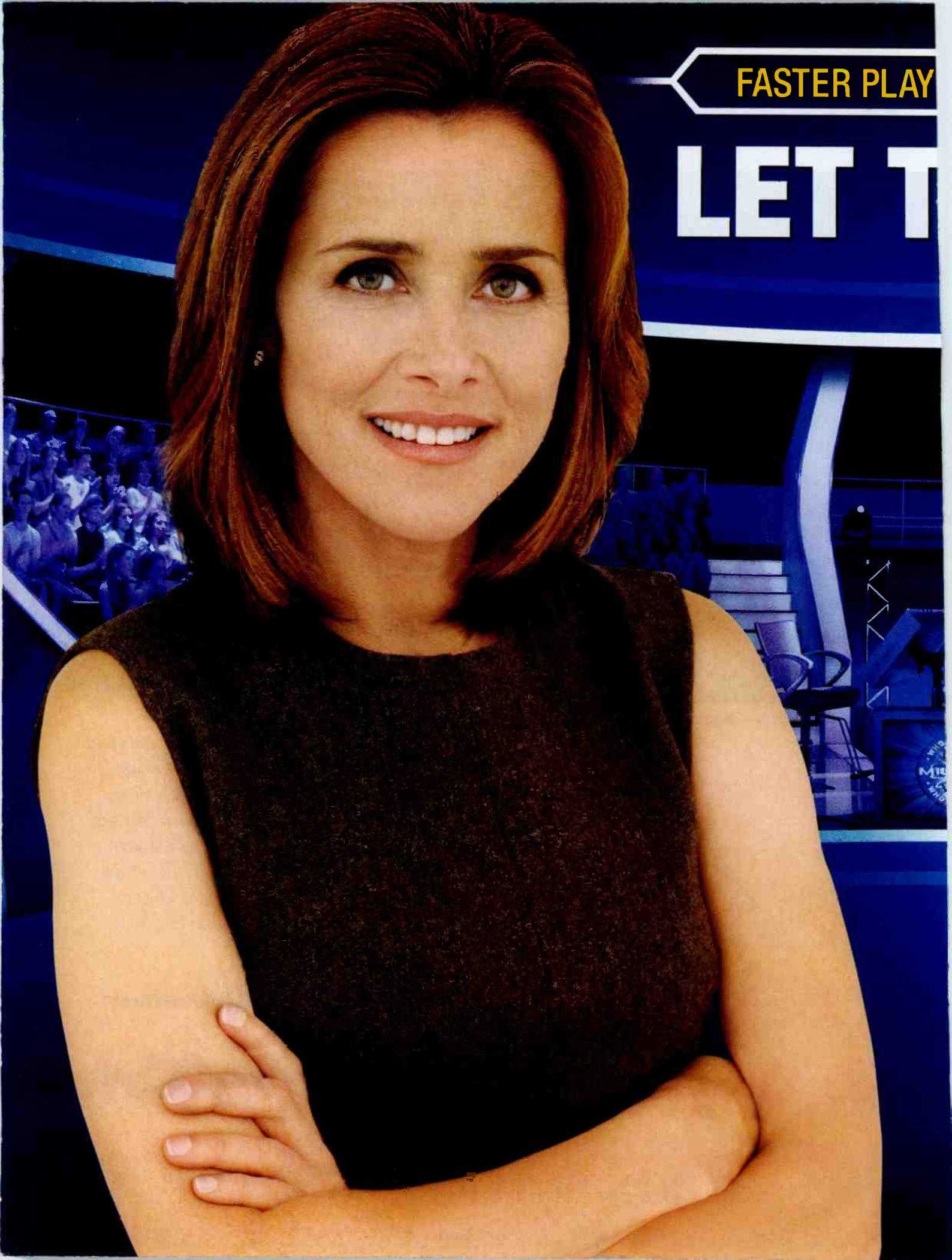
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Satellite Spectrum Wars

Northpoint faces potential court battle to overcome FCC decision on auction

SATELLITE TV By Todd Shields

An innovative way to beam television signals into homes in competition with cable and satellite has come a big step closer to market following a recent Federal Communications Commission decision to award a portion of wireless spectrum for what it describes as "multichannel and data distribution service." Paradoxically, that same decision could sideline the company that led the push for the new service.

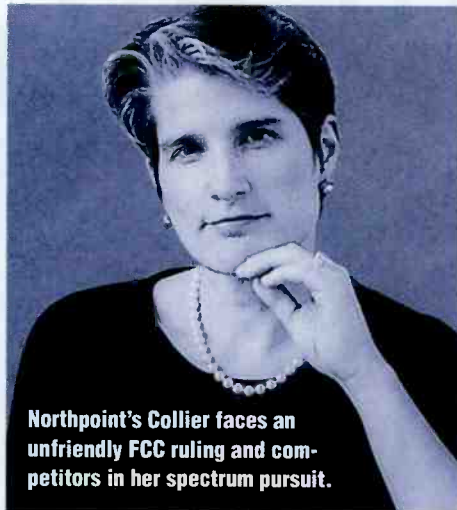
In 1994, Austin, Texas-based Northpoint Technology began lobbying the FCC to approve its idea to share the spectrum used by direct broadcast satellite services EchoStar and DirecTV to deliver "high-quality, digital multichannel video and high-speed Internet service" with local programming in 210 local markets, all for \$40 per month. That kind of service would be a very serious challenge to both cable and to DBS, which currently does not offer local channels in about 170 markets.

Northpoint's premise is that a competing service could reach north-facing dishes without causing unacceptable interference to DBS signals (which are picked up by south-facing dishes). Northpoint proposed a land-based system of transmission antennas on towers and buildings, sending signals southward over about a 10-mile range. Northpoint has spent the past eight years lobbying Washington spectrum overseers, including the FCC and members of Congress.

On April 23, Northpoint got what it was asking for, but it also received what could be a deal-breaker. While the FCC approved the new service, it also said the spectrum would be put up for auction in hundreds of small geographic pieces. The decision means that Northpoint will have to compete with large corporations for a spectrum use it believes it discovered.

FCC chairman Michael Powell and commissioner Kathleen Abernathy said in written comments that they sympathize with Northpoint's arguments that it deserved free spectrum. "There is little question that had it not been for Northpoint, the...service would not be ready to move forward today," they wrote. But the FCC concluded that federal law left them no option other than putting the spectrum up for auction. Obviously, that didn't go over well with executives at Northpoint.

"We don't think patting us on the back and saying, 'Nice job, we'll take that,' is the way to go," said Northpoint president Sophia Collier.



Northpoint's Collier faces an unfriendly FCC ruling and competitors in her spectrum pursuit.

The FCC's plan for the auction—no date has been set—splits the country into 348 areas, with separate bidding to be held on each block. If Northpoint loses big cities, it's in trouble, Collier said. "This business plan does not work without a national network," she said, adding that, if necessary, Northpoint will ask the courts to overrule the FCC and grant it the spectrum. At the same time, several members of Congress have indicated sympathy for Northpoint.

But success is far from certain in the messy legislative arena, especially given Northpoint's powerful and motivated rivals. These include satellite providers worried about their picture quality. "They want to run a service that will interfere with our service," said James Ashurst, a spokesman for the Satellite Broadcasting and Communications Association. "We're disappointed the FCC even allowed sharing."

Northpoint has a direct and bitter competitor, as well. Stuart, Fla.-based MDS America is the licensee for a French-designed multichannel system similar to Northpoint's that is already deployed in such locales as Oman, Greenland and Andorra. In lawsuits, Northpoint says MDS America is infringing upon Northpoint's patents, while MDS America says Northpoint was improperly awarded patents for technology MDS developed. Kirk Kirkpatrick, MDS America president/CEO, said his system can send video programming or high-speed Internet, whichever the local market demands.

Kirkpatrick praised the FCC's decision, saying MDS America is happy to participate in an auction. "We're not asking for anybody to give us anything," Kirkpatrick said. ■

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Local Media

TV STATIONS | NEWSPAPERS | RADIO STATIONS | OUTDOOR | MAGAZINES

SAN FRANCISCO NEWSPAPERS

Struggling *Examiner* Morphs Into Tabloid

BY EILEEN HUDSON DAVIS

The Fang family is shaking things up again, taking the drastic step last week of switching *The San Francisco Examiner*, which the Fangs acquired two years ago, from a broadsheet format to a tabloid.

"The *Examiner* is a bolder, brasher, alternative in San Francisco, and we thought the tab format would really be more fitting," said Ron Reason, vp/creative director of Garcia Media, the firm hired to do the redesign. The smaller paper boasts a revamped front page that features a "much more focused, almost menu-driven approach," with two or three bold headlines and story summaries, Reason said.

The Fangs acquired the *Examiner* in an unusual deal when New York-based Hearst Corp. divested itself of the paper and gave the family a \$66 million subsidy when it purchased larger rival the *San Francisco Chronicle*. Since the Fangs acquired the *Examiner*, which publishes Monday to Friday, the paper has switched from an afternoon to morning publishing schedule to compete head-to-head with the *Chronicle*. The paper has also suffered from much-publicized family infighting; Florence Fang fired her son Ted Fang as publisher last October and took over that position. Other top executives have also exited the paper in the last year.

Garcia Media also retooled the paper's departments. The *Examiner's* feature section has been reorganized into a 20-page daily section that will carry a different theme each day. For instance, Mondays will have a TV section within the daily arts and entertainment pull-out. A new food section called S. F. Eats runs Wednesdays, and nightlife updates appear on Thursdays. The Friday movie pullout, called Weekend, will be a broadsheet section of about 12 pages. Reason said the Fangs decided to go with the broadsheet format for Weekend to help pacify movie advertisers, who prefer the format for their advertising.

Some local media buyers said the *Examiner's* credibility has already been tarnished, so the



Inside its revamped cover, *The Examiner* has a new feature section with distinct daily themes.

format change will have little impact. Said one local media planner, who spoke on the condition of anonymity: "I don't feel people here really consider it a real newspaper. Whatever they're going to do, it can't get any worse than it is now." Derek Leedy, media account manager with Mediasmith, a full-service San Francisco-based ad agency, agrees with that sentiment. "It's been sensationalist for a while, so it's just adapting to a format that's more fitting to its editorial content," he said.

But Chris Beck, the *Examiner's* marketing director, said the response from local advertisers has been stronger than expected. He said the initial plan was to debut the tab with 64 pages, but it will expand by a half-dozen pages to meet advertiser demand.

"We feel that the tabloid is a fresh and exciting format for readers," says *Examiner* executive editor Zoran Basich, who adds that the tab format is quicker and easier to use, particularly

in a city with a large number of transit users.

Basich also said the format will help the *Examiner* distinguish itself from the *Chronicle*. "San Francisco has an established broadsheet. We'll provide a fresher take on news, more pointed commentary," and other attributes similar to papers such as New York's *Daily News*, *Boston Herald* and *The Philadelphia Daily News*, said Basich.

While the overriding objective of the format change is to attract more readers and advertisers, it will be difficult for the *Examiner* to prove circulation gains—if any—resulting from the format change, since the paper remains under a voluntary temporary suspension of Audit Bureau of Circulations rules. Beck, however, said ABC will conduct an on-site audit in August or September.

BOSTON TV STATIONS

Nielsen Signs WUNI-TV

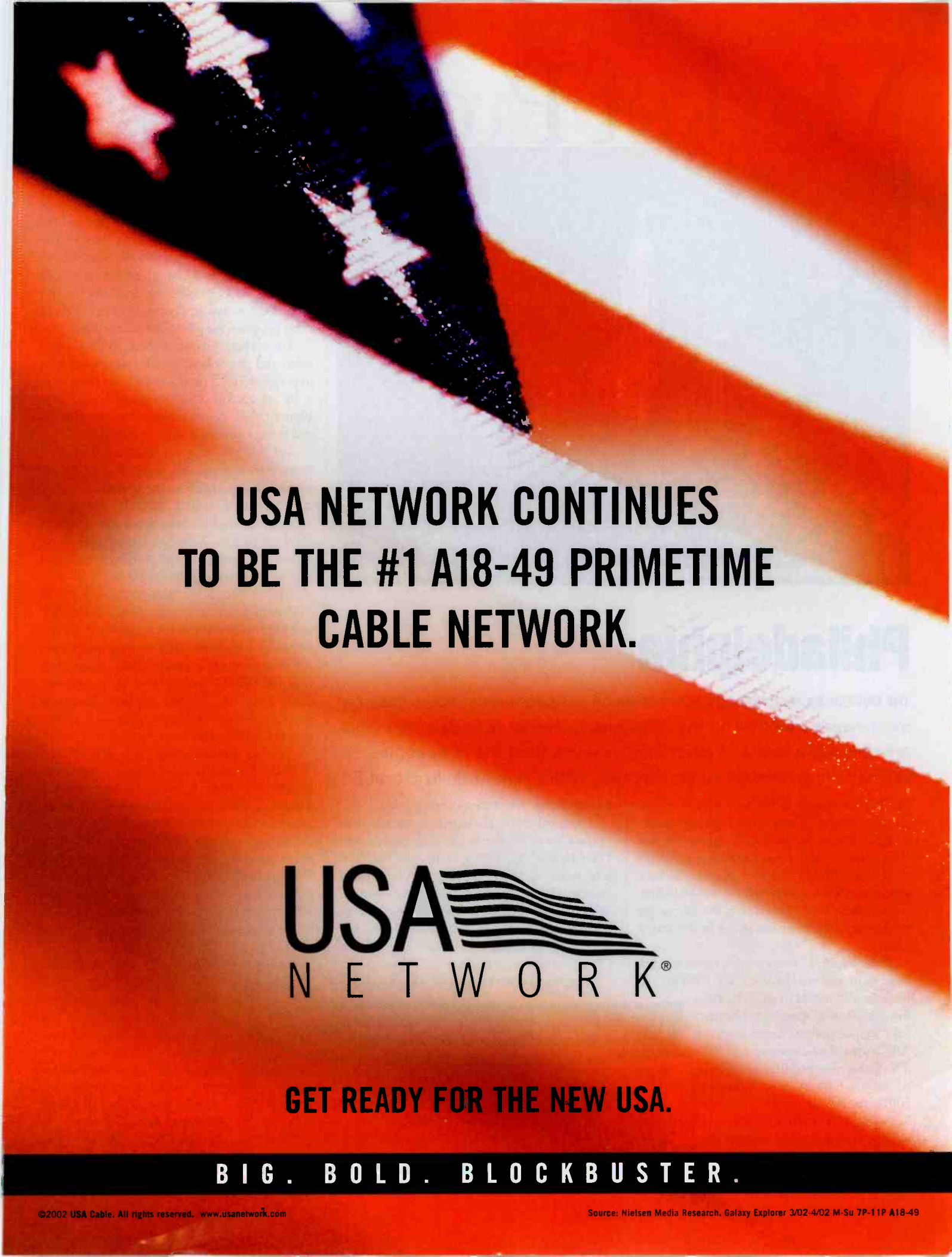
Nielsen Media Research last week signed up Univision affiliate WUNI-TV in Boston for its local people meter service in the market. The Entravision-owned outlet is the second broadcast station to sign on for the new Nielsen service, following WNDS-TV, an Independent station in Derry, N.H.

All of the other TV stations in the market have balked at Nielsen's higher fees for the new service and claim it provides inaccurate audience data. Those stations have been operating without Nielsen ratings information since the start of the May sweeps on April 25.


"People meters will provide us with more complete, more accurate ratings data from which to negotiate with media buyers," said Gary Marder, WUNI vp/general manager. The local people meter service, with its demographic measurement capability, replaces Nielsen's standard local measurement methodology, which relies on separate samples of metered households and one-week paper diaries.

"The people meter is superior in terms of accuracy, in providing next-day demographic ratings and in its capacity to provide clients with analytical capabilities," said Jack Oken, general manager in charge of local services for Nielsen Media Research, which is owned by VNU, publisher of *MediaWeek*.

Other local media outlets participating in the people meter service in Boston are AT&T Broadband, New England Cable News and New England Sports Network. —Jim Cooper



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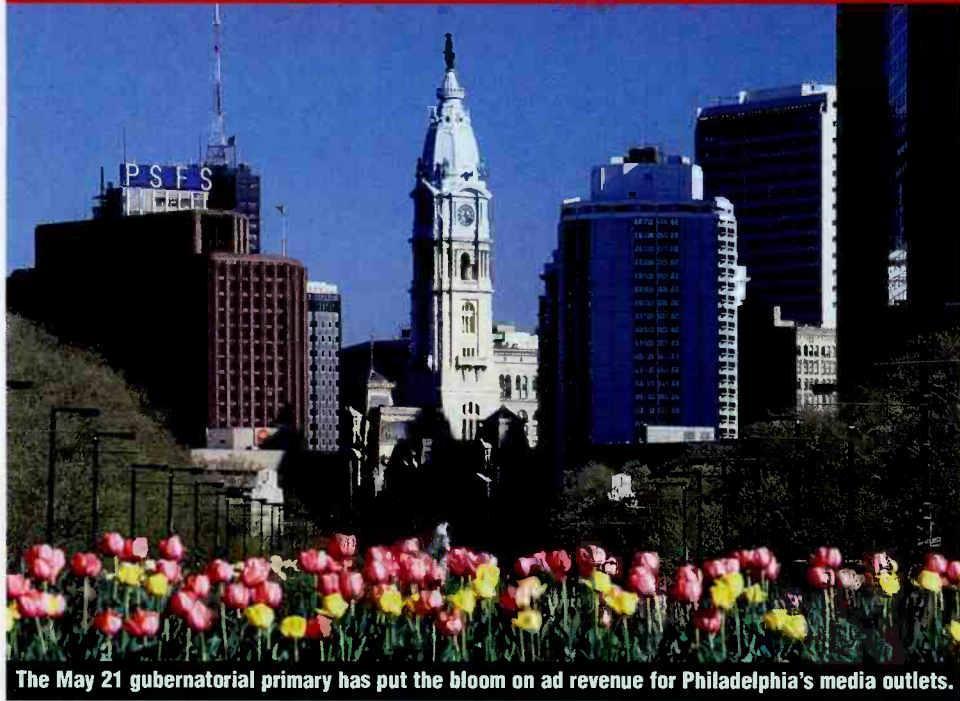
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Market Profile

BY EILEEN DAVIS HUDSON



The May 21 gubernatorial primary has put the bloom on ad revenue for Philadelphia's media outlets.

Philadelphia

THE NOVEMBER ELECTION OF A NEW GOVERNOR OF PENNSYLVANIA SHOULD CREATE a much-needed windfall for the Philadelphia market. Already, local media are enjoying a boost in advertising revenue from the hotly contested Democratic gubernatorial primary race pitting former Philly mayor Ed

Ed Rendell against Bob Casey Jr., son of late governor Robert Casey. State attorney general Mike Fisher is the front-runner for the Republican nomination for governor. With total fund-raising for the governor's race exceeding \$35 million several weeks before tomorrow's (May 21) primary, the campaign has become the most expensive in the state's history.

Philadelphia's broadcast television market (No. 4 in the nation with 2.8 million TV households) stands to gain the most from political ad spending. The market's long-dominant news leader is ABC's owned-and-operated WPVI-TV. The station pulled in an estimated \$168.4 million in ad billings in 2001, according to BIA Financial Network. That not only outdistanced billings of rival stations in the market by a long shot, but also put WPVI in elite company as ninth among the

top-10 billing TV stations in the nation.

In a competitive shakeup that was big news in the City of Brotherly Love, second-ranked WCAU, the NBC O&O, dethroned WPVI in late news in the February 2001 Nielsen sweeps, the first time in a quarter century. WCAU has since won the sweeps race in November 2001 and in February 2002, the latter owing to a big boost from the Winter Olympic Games on NBC.

Despite the sea change at 11 p.m., Dave

Dennis, WPVI president and general manager, says he has no major changes planned for his station's news. "We obviously have a challenge every day trying to do the best job we can," said Dennis. Although he concedes that the weak ABC prime-time lead-ins haven't helped the situation, Dennis believes WPVI's news programming remains competitive.

For his part, Dennis Bianchi, WCAU president and gm, is keeping the sweeps victories in perspective. "This is a great news town with a lot of terrific news organizations," says Bianchi. "We try to really serve our viewers and bring a certain energy to our news."

WCAU shook up its morning news and news/feature programs in April. The station hired Tiffany McElroy to co-anchor its 5-7 a.m. newscast, called *NBC 10 Today*, and relaunched its hourlong news and features show at 10 a.m. The live, unscripted show, called *10!*, features local people, events and topics in a newsmagazine format.

The CBS TV Stations' duopoly in Philadelphia includes CBS O&O KYW-TV and UPN outlet WPSG. Executives at the stations did not return calls seeking interviews. KYW is running a distant third in the news race and WPSG doesn't carry any local newscasts. Last fall, WPSG acquired *Everybody Loves Raymond* in syndication, which it schedules in a double-run from 7 to 8 p.m.

Tribune Broadcasting Co.'s WB affiliate WPHL-TV has had to fight an uphill battle against its more established competitors. "This television station has improved dramatically in the last year," says Leslie Glenn, WPHL vp and gm. Glenn says ratings have gone up in nearly every daypart, including WB's prime time. However, the station has failed to see any ratings improvement with its 10 p.m. late news, which continues to lose to its only competitor in the time period, Fox O&O WTXF-TV.

Following the Sept. 11 terrorist attacks, WPHL expanded its late news from a half hour to an hour on weeknights (it remains a half hour on weekends). In hopes of bolstering the station's news ratings, Glenn hired news director Chuck Carter almost two months ago. Carter had been assistant news director at WTIC-TV, Tribune's Fox affiliate in Hartford, Conn. WPHL will acquire *Will &*

NIelsen MONITOR-PLUS AD SPENDING BY MEDIA / PHILADELPHIA

	Jan.-Dec. 2000	Jan.-Dec. 2001
Spot TV	\$621,204,418	\$666,189,423
Local Newspaper	\$480,171,211	\$372,382,794
Spot Radio	\$195,133,416	\$199,347,536
Outdoor	\$51,517,951	\$53,966,799
Local Magazine	\$15,568,593	\$10,726,380
Total	\$1,363,595,589	\$1,302,612,932

Source: Nielsen Monitor-Plus

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Market Profile

Grace in syndication in the fall. The station is also in the last year of its contract to carry the preseason games of the National Football League's Philadelphia Eagles.

Fox's WTXF, which has had several recent on-air talent changes, also produces morning news from 6 to 7, and a morning news and entertainment program from 7 to 9 called *Good Day Philadelphia*. Execs at WTXF did not return phone calls.

Paxson Communications' Philadelphia outlet WPPX rebroadcasts WCAU's local news as part of a joint sales agreement between the stations. Independent station WGTW, owned by Brunson Communications, is not a major player in the market, but it did generate about \$6.8 million in billings last year, according to BIA. The station carries syndie fare including *Married With Children*, *Family Feud* and *Mad TV*. Hispanic Broadcasting's Telemundo affiliate WWSI, licensed out of Atlantic City, N.J., and Univision Communications' WUVP, licensed out of Vineland, N.J., serve the market's Hispanic population, which makes up about 5 percent of the DMA's total population.

Philadelphia's newspaper scene is crowded and competitive. Though Knight Ridder's *The Philadelphia Inquirer* and *The Philadelphia Daily News* are dominant dailies, they both face a competitive onslaught from a dozen other aggressive daily newspapers in the Greater Philadelphia metro area.

The *Inquirer's* daily circulation fell 3.1 percent to 381,104 in the six months ended March 31, according to the Audit Bureau of Circulations. Sunday circ was essentially flat at 760,026. The *Daily News's* daily circ for the period was also flat at 151,842, but its Saturday circ sank 7.2 percent to 70,872.

The two papers, marketed under the Philadelphia Newspapers Inc. (PNI) banner, are a study in contrasts. The *Inquirer* is the traditional, older-skewing daily, with local, national and international coverage. The tabloid-size morning *Daily News* is its more unabashed, in-your-face sibling. About 85 to 90 percent of the *Daily News's* circulation is derived from single-copy sales and therefore counts on attention-grabbing headlines and pictures to boost newsstand sales.

The *Inquirer's* steady circulation declines led to some recent management changes, which included the hiring of Walker Lundy as the top editor last November. Lundy previously served as editor of Knight Ridder's *Saint Paul (Minn.) Pioneer Press*. He has said the *Inquirer's* admitted problems covering the city's burgeoning suburbs will be his first order of

RADIO LISTENERSHIP / PHILADELPHIA

STATION	FORMAT	Avg. Qtr.-Hour Share	
		Morning Drive, 12+	Evening Drive, 12+
KYW-AM	News	11.1	5.8
WYSP-FM	Rock	8.4	6.1
WBEB-FM	Soft Rock	6.9	7.2
WDAS-FM	Urban Adult Contemporary	5.9	4.9
WIOQ-FM	Contemporary Hit Radio/Top 40	5.0	5.8
WPHI-FM	Rhythmic Contemporary Hit Radio	4.1	3.2
WJJZ-FM	Smooth Jazz	4.0	6.2
WUSL-FM	Urban	4.0	5.5
WXTU-FM	Country	3.9	3.5
WOGL-FM	Oldies	3.8	4.5

Source: Arbitron Winter 2002 Radio Market Report

NEWSPAPERS: THE ABCS

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Philadelphia County: 579,670 Households				
<i>The Philadelphia Inquirer</i>	109,034	225,975	18.8%	19.0%
<i>The Philadelphia Daily News</i>	97,516		16.8%	
Montgomery County: 295,840 Households				
<i>The Philadelphia Inquirer</i>	71,817	135,172	24.3%	45.7%
<i>Norristown Times Herald</i>	19,479	16,652	6.6%	5.5%
<i>Lansdale Reporter</i>	17,240		5.8%	
<i>Pottstown Mercury</i>	14,078	14,612	4.8%	4.9%
<i>The Philadelphia Daily News</i>	13,413		4.5%	
Greater Philadelphia Newspapers	12,351	13,839	4.2%	4.7%
<i>The (Doylestown) Intelligencer Record</i>	12,196	13,319	4.1%	4.5%
Bucks County: 219,507 Households				
Greater Philadelphia Newspapers	100,892	113,783	46.0%	51.8%
<i>Bucks County Courier Times</i>	67,379	74,139	30.7%	33.8%
<i>The (Doylestown) Intelligencer Record</i>	32,729	39,796	14.9%	18.1%
<i>The Philadelphia Inquirer</i>	31,106	65,278	14.2%	29.7%
<i>The Philadelphia Daily News</i>	6,167		2.8%	
<i>Allentown Morning Call</i>	4,564	5,826	2.1%	2.7%
<i>The Trentonian</i>	3,736	2,876	1.7%	1.3%
<i>The Trenton Times</i>	2,758	3,201	1.3%	1.5%
Delaware County: 206,106 Households				
<i>The Philadelphia Inquirer</i>	53,175	99,163	25.8%	48.1%
<i>Delaware County Times</i>	45,870	42,895	22.3%	20.8%
<i>The Philadelphia Daily News</i>	10,163		4.9%	
Chester County: 157,899 Households				
<i>The Philadelphia Inquirer</i>	38,108	69,902	24.1%	44.3%
<i>West Chester Daily Local News</i>	28,636	28,964	18.1%	18.3%
<i>Pottstown Mercury</i>	5,992	6,058	3.8%	3.8%
<i>The Philadelphia Daily News</i>	4,505		2.9%	
<i>The (Phoenixville) Phoenix</i>	3,012		1.9%	
<i>Wilmington News Journal</i>	2,573	3,361	1.6%	2.1%

Source: Audit Bureau of Circulations

business. "Our big focus this year is, once and for all, straightening out our suburban approach and building sustainable circulation growth," says Todd Brownrout, senior vp, sales and marketing for PNI.

For example, the *Inquirer* had made a major foray into Chester county (just west of the city) about two years ago, only to pull back a year later. "We may have overcommitted to that area," says Brownrout. He also says the biggest challenge in covering the suburbs has been

how to allocate limited resources to cover more than 300 municipalities in the face of considerable competition. A strategic plan to tackle this coverage problem will be announced by fall, Brownrout says. The paper has already started implementing some changes, which involve using new ABC discounting rules, as well as an ad campaign on cable and a direct-mailing push, both of which were launched in March.

Meanwhile, the *Daily News* is facing its

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MONDAY, JUNE 24TH AT 9PM/8C



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SCARBOROUGH PROFILE

Comparison of Philadelphia

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Philadelphia Composition %	Philadelphia Index
DEMOGRAPHICS			
Age 18-34	31	30	96
Age 35-54	41	40	97
Age 55+	28	31	109
HHI \$75,000+	28	32	113
College Graduate	12	12	100
Any Postgraduate Work	11	11	108
Professional/Managerial	23	22	96
African American	13	17	133
Hispanic	13	5	43
MEDIA USAGE - AVERAGE AUDIENCES*			
Read Any Daily Newspaper	56	61	110
Read Any Sunday Newspaper	64	69	109
Total Radio Morning Drive M-F	22	24	112
Total Radio Evening Drive M-F	18	19	108
Total TV Early Evening M-F	29	27	94
Total TV Prime Time M-Sun	38	40	105
Total Cable Prime Time M-Sun	13	14	103
MEDIA USAGE - CUME AUDIENCES**			
Read Any Daily Newspaper	74	80	107
Read Any Sunday Newspaper	77	83	107
Total Radio Morning Drive M-F	75	79	106
Total Radio Evening Drive M-F	73	5	103
Total TV Early Evening M-F	71	66	93
Total TV Prime Time M-Sun	91	91	100
Total Cable Prime Time M-Sun	59	61	104
MEDIA USAGE - OTHER			
Access Internet/WWW	62	63	102
HOME TECHNOLOGY			
Own a Personal Computer	68	69	101
Purchase using Internet	37	38	102
Connected to Cable	69	80	117
Connected to Satellite/Microwave Dish	15	8	55

*Media Audiences-Average: average issue readers for newspapers; average quarter-hour listeners within a specific daypart for radio; average half-hour viewers within a specific daypart for TV and cable. **Media Audiences-Cume: 5-issue cume readers for daily newspapers; 4-issue cume readers for Sunday newspapers; cume of all listeners within a specific daypart for radio; cume of all viewers within a specific daypart for TV and cable.

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

share of competition from *Metro*, a free daily that shook up the market when it rolled out three years ago. *Metro* is a property of London-based Metro International Group.

Metro is distributed free to commuters using the Southeastern Pennsylvania Transportation Authority (SEPTA) rail system. As part of a five-year deal, SEPTA provides one page of editorial content in *Metro* but has no control over the editorial content of the rest of the paper. *Metro* has a Monday-to-Thursday controlled circ of 158,493 and a Friday circ of 194,422, says publisher Jim McDonald. The paper is also available on college campuses, office buildings, convenience stores and other locales around the city. In February, McDonald says the paper started testing home delivery in the outskirts of the city.

The market also supports several special-interest publications, including two very competitive alternative weeklies. Review Publishing's 31-year-old *Philadelphia Weekly* (115,000 free distribution), which publishes on Wednesdays, does battle with Metroweek Corp.'s 21-year-old *Philadelphia City Paper* (104,000 free distribution), which publishes Thursdays.

Among the major suburban players is Journal Register Co., based in nearby Trenton, N.J. The company owns seven dailies in the Pennsylvania and New Jersey suburbs that surround Philadelphia. The company has a total daily circulation of about 200,000 and a non-daily distribution of about 1.1 million. Journal Register markets its Philadelphia-area dailies, weeklies and other nondaily publications under a single "Journal Register All Around Philly" umbrella tagline. Its Norristown, Pa.-based *The Times Herald* launched a Sunday issue in March.

Calkins Media, based in Levittown, Pa., publishes three suburban daily papers: the *Burlington County Times* in Willingboro, N.J., *Bucks County Courier Times* in Levittown and *The Intelligencer Record* in Doylestown. Calkins' papers, managed under the banner of Greater Philadelphia Newspapers, have a combined daily circulation of about 234,000 and a combined Sunday circulation of more than 265,000.

Newspaper giant Gannett Co. is another significant player in the Philly suburbs. It owns the *Courier-Post* in Camden, N.J., and *The News Journal* in Wilmington, Del. *The Times* in Trenton, N.J., part of the Newhouse family's Advance Publications, also sells about 12,000 copies in the Philadelphia suburbs.

Infinity Broadcasting has the largest presence in the Philadelphia radio market, which is ranked sixth in the country, controlling a

33.2 percent share of the advertising revenue. According to BIA Financial Network, Infinity's five stations generated an estimated \$100 million in ad billings last year.

Clear Channel Communications has the second-largest market share, at nearly 27 percent, based on an estimated \$80.2 million in ad billings for its six outlets, according to BIA (see *Radio Ownership chart on page 22*). Greater Media, which operates four stations in the market under the name Greater Philadelphia Radio Group, is in third place. Its stations generated a combined \$40 million in estimated ad billings, giving Greater Media a 13.3 percent market share, according to BIA.

Privately owned WEAZ-FM Radio Inc. has just one station in Philadelphia, Soft Rock

outlet WBEB-FM. However, the station is consistently one of the market's top two stations. BIA reports WBEB took in \$25 million in ad revenue last year, giving WEAZ-FM Radio an 8.3 percent market share.

Greater Media has made several changes to two of its four local stations in the last year. Most recently, Hot Adult Contemporary station WMWX-FM tweaked its format somewhat to appeal to a wider audience. "We broadened the station to become a more mainstream Hot AC, to include a little more Pop," says Chris Ebbott, program director for WMWX, which targets women 25-44. Ebbott says his station aggressively competes for female listeners in the market with WBEB and WIOQ-FM, Clear Channel's Contempo-

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Market Profile

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EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

rary Hit Radio/Top 40 outlet.

WMWX also switched its on-air personalities about two months ago. Its previous afternoon-drive duo Danny and Mack are now holding down the morning-drive slot. Rick Stacy, who came to the station last October from Denver as its morning man, is now hosting its afternoon drive. Lauren Valley, the former afternoon-drive host on sister outlet Classic Rocker WMGK-FM, handles middays.

WMGK-FM also has tweaked its format, moving away from its Classic Hits format to playing more contemporary Classic Rock fare. The station has also changed its on-air talent, recently tapping Andre Gardner as its new afternoon man.

WPHT-AM, Infinity's Talk outlet in the market, has also had some talent changes, shuffling its lineup to rehire Michael Smerconish as its afternoon-drive host from 3 to 6 p.m. Smerconish, a practicing lawyer, will continue to write his weekly column for *The Philadelphia Daily News* and will provide commentary on KYW-AM, Infinity's News powerhouse in the market. KYW fights for the No. 1 overall spot with WBEB. Following Smerconish's departure from WPHT-FM at the end of last year, ratings immediately plummeted. The station fell from a 3.6 share among listeners 12-plus in the Fall 2001 Arbitron book to a 2.4 share in the Winter 2002 book.

Philadelphia-based Comcast Corp., which is poised to become the nation's largest cable operator with its pending purchase of AT&T Broadband, dominates cable distribution in Philadelphia and much of the nearby area.

According to Scarborough Research, cable penetration in the market is 80 percent, much higher than the national average of 69 percent in the top 50 markets (see Scarborough chart on page 20). Satellite penetration, however, is just 8 percent, nearly half the national average for the top 50 markets of 15 percent.

Comcast owns two-thirds of the National Basketball Association's Philadelphia 76ers and the National Hockey League's Philadelphia Flyers. Its regional sports service, Comcast SportsNet, which is entering its fifth year of existence, is one of the most-watched cable networks in the market, thanks to Philly's rabid fans. The net will offer 100 sporting events in high-definition television starting next January. Comcast also owns and operates CN8, a 24-hour cable-news network serving about 4 million cable homes in Pennsylvania, New Jersey, Delaware and Maryland.

Among outdoor-media players in the market, Clear Channel Outdoor has the largest billboard market share, offering about 800

Evening News

Time	Network	Station	Rating	Share
4-5 p.m.	NBC	WCAU	6.5	14
5-5:30 p.m.	ABC	WPVI	12.6	23
	NBC	WCAU	7.1	13
	Fox	WTFX*	4.4	8
	CBS	KYW	3.0	6
	WB	WPHL*	2.5	5
	UPN	WPSG*	2.3	4
	Independent	WGTW*	0.7	1
5:30-6 p.m.	Pax	WPPX*	0.4	1
	ABC	WPVI	12.6	23
	NBC	WCAU	7.1	13
	Fox	WTFX*	5.0	9
	CBS	KYW	3.0	6
	UPN	WPSG*	2.6	5
	WB	WPHL*	2.5	5
6-6:30 p.m.	Independent	WGTW*	0.5	1
	Pax	WPPX*	0.4	1
	ABC	WPVI	15.8	27
	NBC	WCAU	8.2	14
	Fox	WTFX*	3.6	6
	CBS	KYW	3.4	6
	WB	WPHL*	3.0	5
10-11 p.m.	UPN	WPSG*	2.6	4
	Pax	WPPX*	0.7	1
	Independent	WGTW*	0.4	1
	Fox	WTFX	5.0	7
	UPN	WPSG*	2.8	4
	WB	WPHL	2.3	3
	11-11:30 p.m.	NBC	WCAU	11.0
ABC		WPVI	10.9	18
CBS		KYW	6.7	11
Fox		WTFX*	2.9	5
WB		WPHL*	2.5	4
UPN		WPSG*	2.4	4
Independent		WGTW*	0.8	2
Pax	WPPX*	0.6	1	

Late News

10-11 p.m.	Fox	WTFX	5.0	7
	UPN	WPSG*	2.8	4
	WB	WPHL	2.3	3
11-11:30 p.m.	NBC	WCAU	11.0	21
	ABC	WPVI	10.9	18
	CBS	KYW	6.7	11
	Fox	WTFX*	2.9	5
	WB	WPHL*	2.5	4
	UPN	WPSG*	2.4	4
	Independent	WGTW*	0.8	2
Pax	WPPX*	0.6	1	

*Non-news programming. Includes Olympics/Late News telecasts.
Source: Nielsen Media Research, February 2002

RADIO OWNERSHIP

OWNER	STATIONS	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Infinity Broadcasting	3 AM, 2 FM	22.4	\$100.1	33.2%
Clear Channel Communications	1 AM, 5 FM	25.9	\$80.2	26.6%
Greater Media	1 AM, 3 FM	10.8	\$40.0	13.3%
WEAZ-FM Radio Inc.	1 FM	7.5	\$25.0	8.3%
Radio One	2 FM	5.4	\$14.4	4.8%
Beasley Broadcast Group	2 FM	5.3	\$13.8	4.6%

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

bulletin faces along major thoroughfares around the region, including I-95 and I-76. Clear Channel is the only outdoor company in the market offering 30-sheet poster panels; it controls about 2,800 in the market.

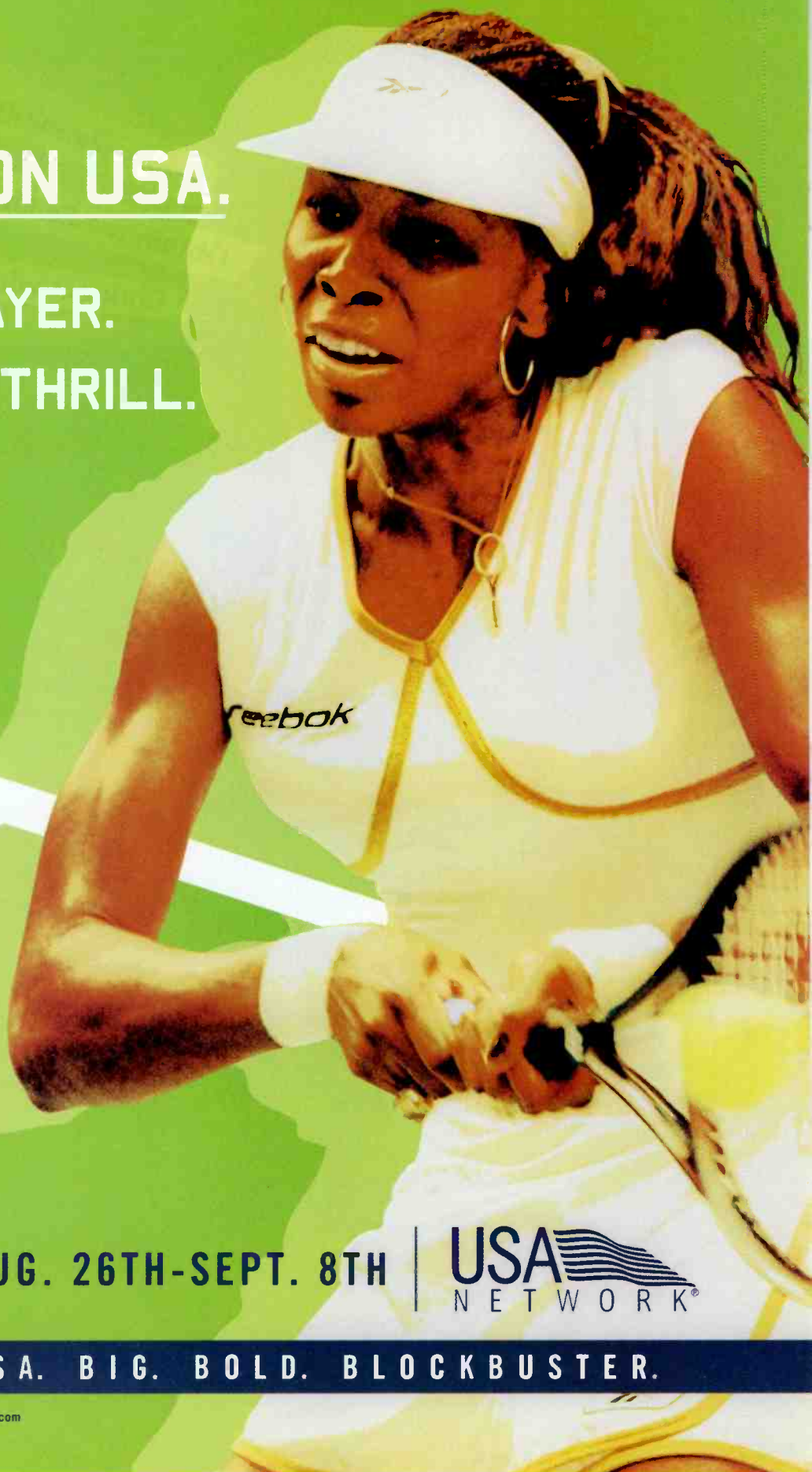
Viacom Outdoor is also a prominent player, offering not only standard-size 14-foot-by-48-foot bulletins, but also city transit advertising through a contract with SEPTA.

Founded in 1930, Steen Outdoor Advertising—Philly's only locally owned outdoor advertising company—offers standard-size and odd-size bulletins in the city and surrounding counties in New Jersey and Delaware. Keystone Outdoor Advertising, based in Cheltenham, Pa., also offers bulletins in the market. NextMedia Outdoor serves the market with 8-sheet poster panels. ■

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All in the Family

Adweek Magazines recently hosted a roundtable session featuring the brains and heart behind the Family Friendly Programming Forum, a group of advertisers (all members of the ANA) that have devoted money, time and resources to promoting and promulgating family friendly programming for the whole family. Panelists included: Andrea Alstrup, corporate vice president of advertising for Johnson & Johnson, the founder of the Forum and its biggest cheerleader; Bill Cella, chairman of Magna Global USA; Brad Simmons, vice president of media services for Unilever U.S.; Kaki Hinton, vice president of advertising services for Pfizer Consumer Group; Valerie Franzoni, manager of national media for Wendy's International; Andrew Jung, director of marketing and media director for the Kellogg Company; Bill McCarron, vice president of media and sponsorships at Verizon; and two media company representatives, David Kenin, executive vice president of programming for the Hallmark Channel and Linda Yaccarino, senior vice president, general sales manager for TBS Superstation.

Moderating the group is veteran media pundit, economist and researcher Jack Myers, publisher and founder of *Jack Myers Report*, a daily newsletter that focuses on media trends. Myers, who has worked in sales and marketing at both CBS and ABC, has been operating his own consultancy since the late 1980s. In 1996, Myers was invited by President Clinton to lead a delegation of advertisers to the White House Conference on Children's Television.

FAMILY FRIENDLY PROGRAMMING FORUM

EXECUTIVE COMMITTEE

Andrea Alstrup, CORPORATE VICE PRESIDENT OF ADVERTISING, JOHNSON & JOHNSON (CO-CHAIR)

Bill Cella, CHAIRMAN, MAGNA GLOBAL, USA

Marc Goldstein, PRESIDENT/CEO, MINOSHARE, NORTH AMERICA

Kaki Hinton, VICE PRESIDENT OF ADVERTISING SERVICES, PFIZER CONSUMER GROUP

Greg Ross, US DIRECTOR OF MEDIA & MARKETING SERVICES, PROCTER & GAMBLE

David Selby, SENIOR VICE PRESIDENT, MARKETING, SEARS ROEBUCK & CO

Brad Simmons, VICE PRESIDENT OF MEDIA SERVICES FOR UNILEVER, US (CO-CHAIR)

MEMBER COMPANIES

Ace Hardware Corporation

American Airlines

The Anschutz Corporation

AT&T Corporation

BellSouth Corporation

The Coca-Cola Company

Eastman Kodak Company

Fedex Corporation

Ford Motor Company

General Mills, Inc.

General Motors Corporation

The Gillette Company

GlaxoSmithKline

H&R Block, Inc.

Hallmark Cards, Inc.

General Motors Corporation

The J.M. Smucker Co.

Johnson & Johnson

Kellogg Company

KFC Corporation

Kraft Foods

Liberty Mutual

The Lowe's Cos., Inc.

Masterfoods Incorporated (M&M Mars)

McCormick & Company, Inc.

McDonald's Corporation

Merck & Company, Inc.

Nationwide Insurance and Financial Services

Nestle, USA Inc.

Pepsico, Inc.

Pfizer Inc

The Procter & Gamble Company

Schering-Plough Corporation

Sears, Roebuck and Co.

Sprint Communications

State Farm Insurance Companies

Texas Instruments Incorporated

Tyson Foods, Inc.

Unilever United States, Inc.

Verizon Communications

Wal-Mart Stores, Inc.

Welch Foods, Inc.

Wellpoint Health Networks

Wendy's International, Inc.

“Our goal is to have the people who are interested in family programming and our national advertisers join. We’ve never really had a membership campaign per se.” —ANDREA ALSTRUP

Myers: Obviously the Family Friendly Programming Forum has been a major force in the industry. I think what we’ll talk about today is how it continues to increase its presence, confront some of the issues that have been written about it over recent weeks and months, and about your efforts, your successes and lack of successes. Andrea, I was hoping we could start with you, since you’re the founder of this organization and have been both an inspiration for it and also a voice of it. Could you tell us a little about how your goals have changed from three years ago when you first had the concept of the organization, where you are today in terms of your expectations and where you see the future going for the organization?

Alstrup: The goals of the group I don’t think have changed at all. Today, three years later, we really have a group of very strong advertisers and individuals who are committed to finding more programming that families can watch together in the early evening hours. And, even more so, we actually have the networks listening to us. I think it’s grown stronger and we are all committed to this for the long term so this isn’t just something that is going to be over this year. This will continue on and on and there will be more advertisers and hopefully more networks. More appropriately, I think we will find more programming. And I just hope that we will be pleasantly surprised with the new season when the networks make some of their announcements about the scripts that have been developed.

Myers: Let’s go around the room and let’s just take each person’s perspective. In just a couple of minutes tell us what your involvement has been but, more importantly, why you’re here and what your hopes and expectations are in terms of

family friendly. It’s nice we have heavy-weight clients, which is appropriate, but also two networks and the largest media buying organization represented. So, Bill.

Cella: It’s pretty simple. Andrea came up with the idea a few years ago and I thought it was fabulous and obviously a challenge. The growth has been really exponential, from eight advertisers initially to over 40. If you get a program on the air within two years time, that’s pretty awesome. I’m so impressed with this group’s development, to be able to get *The Gilmore Girls*, which is pretty well acclaimed, on the air [on the WB] in the first year in the most competitive time period of television—Thursday night 8 o’clock—we’re doing okay. And being moved to Tuesday night at 8 o’clock where it’s really doing well and getting all of this positive feedback, to me is awesome.

Myers: Valerie, from Wendy’s point of view?

Franzoni: Wendy’s certainly is grounded in a founder and a person who certainly had a product that appealed to families. Certainly with the programming we buy we’ve got our commercials and an image of the product that we want to put on air and that we think is definitely family oriented. So when this group was initially formed it made total sense for Wendy’s to get involved because we are always challenged. As much as we have a very broad adult target that we’re going after, we’re always trying to balance what we do in terms of the programming that we go after, where we put our advertising. And I have to tell you we were excited about the idea of trying to encourage more of the networks to get involved in putting that kind of programming on the air. To Bill’s point before, I’m quite stunned in the first year. I think all of

us were really pleasantly surprised in the first year that we were able to get *Gilmore Girls* on the air and now we’ve got *Raising Dad* [also on the WB]. So it’s been a wonderful opportunity, it’s been great feedback and it is interesting how consumers react because they do call the company, they do write you and they’ll talk to you about how they feel about what kind of programming you’re involved in.

Myers: Hallmark, Dave, stands for family, that’s what your brand is all about. Where do you see the initiative taking hold for you?

Kenin: Well I’m happy to be here to meet with clients and advertisers who are interested in this subject because we view ourselves as a network of quality family-friendly programming. And it looks to me in the next twenty four months there’ll be a lot of growth in that area. As we do that, we want to sustain the environment we have created of trust and quality and, at the same time, broaden that. That’s why I’m here.

McCarron: We got involved three years ago listening to Andrea basically because it was a time when the networks were trying to outdo cable with the programming. I think we’ve been stunned at the change in the short period of time. Because there’s a recognition that not just the consumers are looking for alternative programming but the advertisers are standing up saying, “Yes, I’ll support this.” It’s been an amazing change. We’re now a national advertiser trying to reach [adults] 18-34 and if the group weren’t here there would be nothing I’d want to be running on. We have to keep going.

Simmons: From Unilever’s perspective, we have some of the great family brands, and we run thousands and thousands of com-

mercials a year. Up until the forum was put together we monitored all of that content in prime time. We have a pretty rigorous process in place that we use to decide whether a show is acceptable or unacceptable and it's still pretty subjective. I think most of us have those kind of programs or processes, but it was also pretty reactive. So there wasn't really anything in place that was helping us to go out there and find a better [programming] match for those family brands. When I first heard about the forum, I talked to our head of corporate affairs who's kind of my partner as we hear back from groups that are interested in the kinds of programming that Unilever is running in. And we said anything that we can do to help improve our odds of finding programming that's acceptable—and we really focused in on that viewing hour to two hours, 8 to 10 p.m.—is for the good. We initially came in with the other forty, probably 35 at that point, but it didn't take very long for us to step up.

Myers: Well, once you became the co-chairman [of the FFPP] you put your mouth where your money was.

Simmons: Absolutely. The brands, the volume of programming and wanting to do something more proactive were really the three driving factors for Unilever.

Myers: Kaki you've always been very soft spoken [laughs] and you also have the most power on the committee because you control the budget.

Hinton: Pfizer has been a charter member of the Family Friendly Programming Forum since day one when there were only eight of us. We have 33 brands and, like Unilever, all of them are family brands. We have 18-34 targets and 18-49 targets, that's sort of where we live. It's very, very important for our brands to be in programming environments that responsibly inform and entertain. If we're not in those environments then we hear about it through emails or our consumer affairs department. [FFPP is] now over 40 members strong, we have a script development group, 18 members that contribute to the underwriting of scripts. What's phenomenal is that *Gilmore Girls* is still on the air and it's doing phenomenally well. The forum underwrote *Raising Dad*. Along with the WB, we now have ABC, CBS and NBC involved and we have over 40 scripts that we're reviewing. Some are going to pilot, some are not going to pilot.

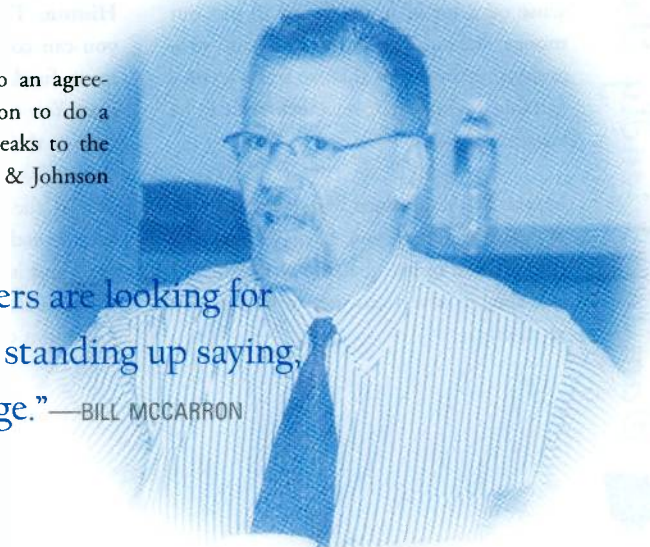
Myers: Back to the issue of getting the money—because ultimately that is the goal, to raise more money, develop more scripts, get more programs on the air. Linda, at the Turner upfront you announced a major initiative with Johnson & Johnson and with Andrea. Could you tell us a little bit about that and also your commitment at Turner?

Yaccarino: We've entered into an agreement with Johnson & Johnson to do a movie franchise that really speaks to the specific initiatives for Johnson & Johnson

along with TNT. We're coming out of the gate this third quarter with a movie starring Bill [William H.] Macy. It's a pretty famous story about a door-to-door salesman who overcomes a lot of adversity and really captivates his town. The franchise speaks to a lot of the focus and concepts that we're talking about in this room. But we really went into it with a mindset to partner with Johnson & Johnson and utilize a lot of the strengths and capabilities that we could have with our company to get the message out there and beyond our partnership, which we are very, very grateful for.

Within the last couple of years we've done a very good job of freeing our schedule of what we would call exclusionary programming. In both the acquisition phase and the development phases that we go through, there's a very specific focus on quality but also on the responsibility that we have as being three of the strongest cable networks out there [TNT, TBS and Cartoon Network] to bring positive messages to our viewers and all of our consumers in this room. That will continue and you will see that throughout a lot of our announcements upcoming and in our development and our new slate for the fall.

“...there's a recognition that not just the consumers are looking for alternative programming but the advertisers are standing up saying, 'Yes, I'll support this.' It's been an amazing change.” —BILL MCCARRON



“...we [Hallmark] want to sustain the environment we have created of trust and quality and, at the same time, broaden that.”

—DAVID KENIN

Jung: Since the Kellogg Co.'s inception we have been about family products, family relationships. Where those brands live in the hearts and minds of consumers is on a table in front of them when they're eating our products, or on television where we're communicating about our products. We also have a very broad array of characters that we are very, very careful about how they are portrayed. We are very careful about where we put Tony the Tiger, who is 50 years old this July. We look for programming that isn't exclusionary, that does appeal to the family. I think unlike some of the other advertisers here, we do appeal to kids directly in a lot of our advertising. But when we do try to appeal to adults and kids—which that first hour of prime-time television sometimes allows us to do—we are looking for a very good quality environment in which to put our characters and our brands. We have been involved with the forum from a very, very early stage. We recently became more active with the forum. We are now members of the script development fund. We also sponsored the season premiere of *Gilmore Girls* this past fall and will look to do more with *Gilmore Girls* and the programming on the WB as part of our broader AOL Time Warner relationship. So, it makes sense on a lot of fronts for us to put our money behind initiatives and put programming on the air that we feel is a comfortable environment for our brands to be associated with.

Myers: You mentioned with pride the over 40 members that you have. What's the composition of membership of the forum? Is it open to advertisers, networks, agencies or strictly...

Alstrup: It's ANA [Association of National Advertisers] members but we do have Bill Cella and Mark Goldstein who are on our executive committee because they are helping us with the programming and the awards event.

Myers: And there's a little bit of a glass half empty, half full. Over 40 members is impressive but there are also more than 300 ANA members who are not part of the forum. What are the plans to have more ANA members joining and what's been holding up the process? Why aren't more members a part of it?

Alstrup: First of all I would say that the glass is three quarters full and I don't think that our goal is to have 320 members. Our goal is to have the people who are interested in family programming and our national advertisers join. We've never really had a membership campaign per se. It's more or less people that have heard about it or people that we've asked very informally. We don't send out a slip that says “would you like to join?” People want to join.

Myers: In terms of budget there's a couple of different levels of funding...

Hinton: There are actually four. One is you can contribute to the script development fund. We have 18 contributing to that. You can buy a gold table or a silver table at the awards event and you can purchase a 30-second or a 60-second commercial in the awards broadcast, which has been broadcast by CBS for the past two years and is on ABC this year. Or you pay the annual membership dues, which is the minimum commitment.

Myers: And when is the awards?

Hinton: The past two years it has been in early August. This year, it is a dinner at the Beverly Hilton on July 31st.

Myers: Bill, from Magna's point of view, you're obviously involved as a member of the executive committee. What has been the overall response from the agency community and your colleagues in the business toward this effort?

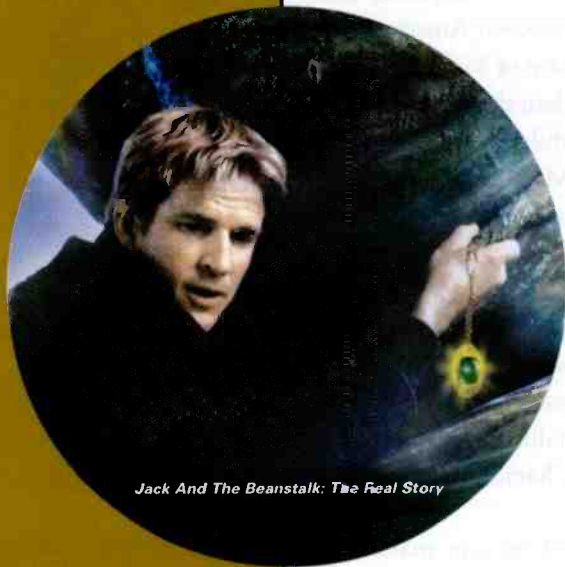
Cella: I think initially there was a lot of skepticism on everybody's part. I think that the success is really awakening awareness of trying to get involved with family-friendly programming. The other agencies I think are taking notice of what's going on and yet it's not really a competitive thing. I think it's more of a discussion about how this thing has grown to what it is. And I think everybody is obviously standing up and taking notice and addressing the issue to their clients and realizing that this initiative really makes a lot of sense.

Hinton: I also think that post Sept. 11 when we sort of saw the demise of the reality programming genre, the shows that were producing gangbuster ratings were the *I Love Lucy* special, the *Carol Burnett* specials, the *Roots* special. There has sort of been a whole new trend that people want family values and that's what they want to see on TV. I think the new program development pilots, at least some of the things that we've seen or heard about, are very much in the genre.

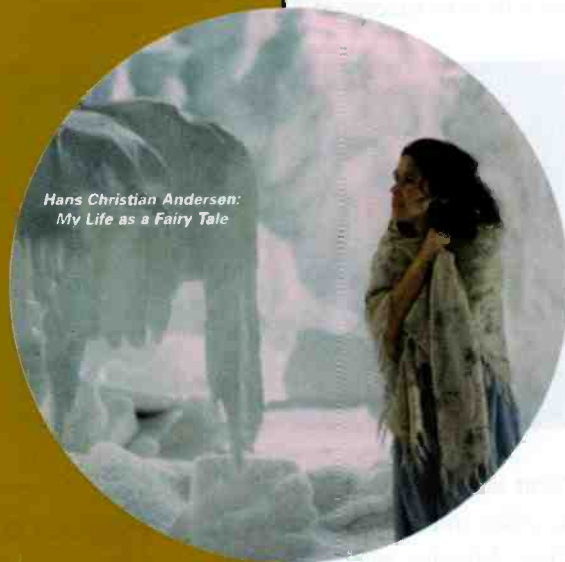
WHERE GREAT STORIES COME TO LIFE



Adoption



Jack And The Beanstalk: The Real Story



*Hans Christian Andersen:
My Life as a Fairy Tale*

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AND
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BELIEVE IN.

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SOURCES: JACK MYERS REPORT MEDIA BRAND TRACKER - STUDY OF GENERAL ENTERTAINMENT NETWORKS, 2002;
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HALLMARK CHANNEL: THE NET

The creation of deeper and more meaningful relationships with viewers and advertisers is a differentiating focus for Hallmark Channel. The meteoric arrival of the network on the television scene in August 2001 was the most successful launch in cable TV history. "This channel fulfills an important need today," says Lana Corbi. "Hallmark Channel offers great stories well-told in a high-quality entertainment-charged environment that is a welcome alternative for our viewers."

"Now, more than ever, Americans are looking for the family friendly programming Hallmark Channel offers – a place where they can escape from stress and uncertainty of the times. Participants in our recent focus groups expressed interest in television that people can watch together, where co-viewing becomes a fun, yet comforting activity." Ms. Corbi says the network is committed to going the extra mile to deliver programming viewers can trust, 24 hours-a-day.



"HALLMARK CARDS IS
IN THE BUSINESS OF
CARING. HOW CAN
WE AS A NETWORK
DO ANYTHING LESS?"

Lana Corbi
President & CEO

UNIQUE PARTNERSHIPS FOR ADVERTISERS

She adds that Hallmark Channel also cares about its programming environment. "We are as protective of our environment as advertisers are about the environment for their message. When they advertise on our network, they become content partners," she says. "We are developing ways to make programming and advertising messages more seamless, to eliminate tune-out for advertisers, and offer a friendlier environment to viewers."

Increasingly, as media-buying organizations see the need to deliver high-quality programming to their clients, they are

coming to Hallmark Channel. The network offers advertisers unique relationships including co-production partnerships, the opportunity to host a programming block, or truly integrated product placements.

ANOTHER WAY HALLMARK CHANNEL CARES: ONGOING CAUSE-RELATED ACTIVITY

"We will spotlight adoption as our national outreach initiative for 2002," Ms. Corbi announced. "Our new reality series, 'Adoption,' made us aware of the needs of more than 500,000 American children in foster care. Did you know the rate of kids going into foster care is growing 20 times faster than the general kid population? And only about 20% of the children available for adoption will be adopted this year. Myths and misconceptions about the process are a big part of the problem."

Hallmark Channel will conduct national and local campaigns to help put potential adoptive parents in touch with reliable sources to answer their questions. The network will run public service announcements and offer resources via hallmarkchannel.com. In several major markets, Hallmark Channel will support a local adoption organization.

"If we can make a difference in the life of just one child, we will have succeeded," Lana Corbi declares.



"HALLMARK CHANNEL
OFFERS ADVERTISERS
THE MOST FAVORABLE
ENVIRONMENT ON
CABLE TELEVISION!"

Chris Moseley
Executive Vice President
Worldwide Marketing & Brand Strategy

"Our viewers trust Hallmark Channel and the programming we offer, and that trust transfers right over to our advertisers," Chris Moseley says. "Three separate quantitative research studies all confirmed the same facts. When you advertise

WORK THAT CARES

on Hallmark Channel, viewers pay more attention to your message, they like the brand better, and they trust the advertising more.”

Ms. Moseley adds that because viewers like Hallmark Channel, they spend more time watching it. The network is #1 in year-to-year growth for time spent viewing. Further, viewers tend to watch the programs from start to finish – including commercials!

THE ONLY NETWORK THAT OFFERS HALLMARK HALL OF FAME COLLECTION

Hallmark Channel is the only place on television where viewers – and advertisers – can find the Hallmark Hall of Fame Collection, the most award-winning entertainment series in the history of television. Hallmark Channel offers the first opportunities for advertisers to incorporate their messages in these mega-movies.

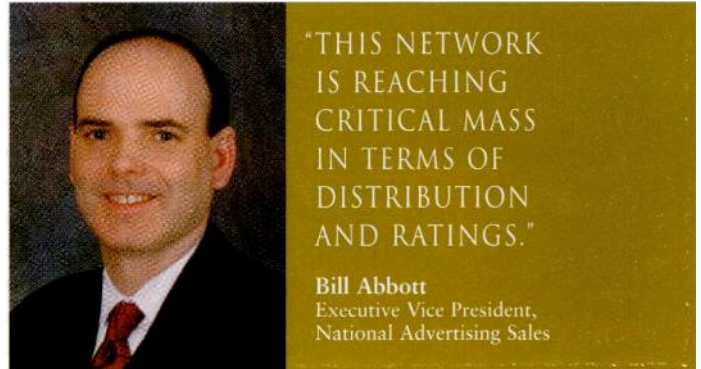
This network is also a home for Hallmark Entertainment original studio productions. The world’s largest producer of blockbuster television movies like “Moby Dick,” “Alice in Wonderland,” and “Arabian Nights,” the studio produces 60 films every year.

And now Hallmark Channel has committed to air 24 new original movies over the next 24 months.

HALLMARK AND HALLMARK CHANNEL DOMINATE THE HOLIDAYS

“One of the most valuable opportunities the network offers advertisers is the chance to partner with Hallmark, the 4500 Gold Crown® stores around the country, and Hallmark Channel in national marketing efforts centered around Valentine’s Day, Mother’s Day, Father’s Day, Back-to-School and the major December holidays,” Ms. Moseley said. The partnership will kick off for Father’s Day around the premiere of “Stranded,” an updated “Swiss Family Robinson.”

“We are no longer an ‘emerging network.’ We have reached the point where we are a player on the cable landscape,” Bill Abbott states with conviction. “Our ratings for programs



like “Roots” and “Mark Twain’s Roughing It” show our ability to be right there among the top ad-supported networks.

“We also have an incredible senior team at Hallmark Channel. Lana Corbi helped make Fox Broadcasting the strong network it is today. Chris Moseley is the marketing whiz behind the launch of a dozen channels including Discovery, TLC, Animal Planet, Travel and Discovery Digital Channels. And Dave Kenin, our head of programming, is the man who took USA to the top. When he predicts Hallmark Channel is heading for a top slot on the television landscape, he certainly understands what it will take to get us there.”

THE BEST FAMILY FRIENDLY ENVIRONMENT ON CABLE

Advertisers who are looking for a family friendly environment will find none better than Hallmark Channel, Mr. Abbott points out, listing the network’s many unique advantages. Quantitative research demonstrates Hallmark Channel meets or exceeds viewer expectations for quality and entertainment. And no other network offers such a trusted advertising environment, where viewers like and believe the advertising message even more.

Mr. Abbott sums it up. “Because the network’s environment is second-to-none in television, Hallmark Channel is the most desirable place for advertisers to showcase their message.”



"It's very, very important for our brands to be in programming environments that responsibly inform and entertain. If we're not in those environments then we hear about it through emails or our consumer affairs department." —KAKI HINTON

Simmons: Hallmark did very well with the *Roots* series. Another thing that I think helped the effort was the fact that the first program to actually be launched from the fund was *Gilmore Girls*. A lot of the networks viewed this maybe early on as us wanting to bring back *Leave It To Beaver*—perfect four person household with two boys and the mom ruffles their hair as they come in the door. In fact, by having essentially a single mom and daughter and exploring the depths of that relationship in a very positive way but still recognizing that life isn't always a bowl of cherries, I think just lent some additional credibility to it.

Myers: In your actual upfront planning, do you give any direction to your buyers to give special attention to family friendly programming? Is there anything in the actual process that supports it beyond what you're doing as an organization?

Alstrup: Since 1976 Johnson & Johnson has had a policy for acceptable television programming, so from day one we've always taken a look at what would be more appropriate and acceptable programming for families versus programs that might not fit that criteria. The other beauty of the forum right now is that it is over 40 individual advertisers. And our initial agreement as part of our charter was the fact that we would continue to individually do whatever we felt we could do and we would jointly do programming if we could, but we weren't going to give up our individuality for some of those things.

Franzoni: All of us have our own program content guidelines in place. I think what really happens is your agency certainly understands what the content guidelines are and they go into that knowing that in

advance. Certainly we discuss particular programs—there's a balance you have to create. We have a very broad target of adults 18-49. But we also try to initiate some things in our discussions—what else is going on? Things like what Johnson & Johnson has just done with Turner. What kinds of things could we work on together? Wendy's had the opportunity a few years ago. It started with a conversation with Steven Spielberg and his Children's Action Network and resulted in the *Home For The Holidays* special that we have for CBS. Those are the kinds of things that through discussions like this—talking about the kinds of programming that's on the air and what can we develop that benefits a lot of people and is good for everyone to sit down and watch—that's the kind of thing we're trying to do as we move forward.

Alstrup: The pickings were pretty slim a few years ago and now it's starting to expand. I think we all appreciate the fact that Linda is here from TNT and David is here from Hallmark. But I don't see ABC, NBC or CBS representatives sitting around this table telling us that their network is this community. Now, yes, they have been very supportive of the script development, which is really our support of them to say we're putting our money on the line here and we expect you to develop some family friendly scripts. I don't think any of us—and I may be speaking out of turn—feel that there is a wealth of family friendly programming out there for us to put on the list to hand to our agency and say these are good things we'd like.

Myers: What can be done to have ABC, CBS, NBC at this table and why aren't they here?

McCarron: While they're not here, I think we have to be cognizant that we've all gone through scripts and we have CBS, NBC, ABC, WB and those groups looking at scripts. So they may not be at this table but they're all involved and that's a major factor.

Myers: What's the process? Do the scripts come in from the networks?

Hinton: Yes they do.

Myers: So they get scripts from the regular sources, they forward the ones to you and what are they looking for? Funding for these scripts? What's the process that it goes through?

Simmons: The process is that as they're going into development, they propose the scripts they want to develop under a family-friendly banner under the script development fund. They will initially put together a brief concept description of it for the forum to consider whether or not it meets the family-friendly criteria. At that point, we review it assuming that it has the potential to be family friendly. We approve it, they go develop it, then send to the script development fund members again to review the scripts. Assuming that it's family friendly, that it's lived up to its potential, they receive funding for it, whether or not it is made into a pilot and on a schedule. If it does reach the schedule at that point...then the script fund is reimbursed.

Myers: Is the funding that you provide sufficient enough to really provide an incentive to the networks to go to the next level?

Alstrup: If the script goes to pilot, the script development fund, the forum is reimbursed. If it doesn't, we pay.

Simmons: But there's not a secondary layer of incentive once it gets to pilot to get it on the schedule or to put advertisers. Then it becomes an individual decision of each advertiser whether to support or not support.

Myers: Let's talk a little bit about the emotional connection to the FFPE. There's clearly business motivations and you've outlined the reasons why it's good for each of your companies and your brands. But for each of you and for your organizations going beyond the business reasons, why is it important for family programming to exist?

Hinton: The passion is there because it underscores the Pfizer values, our colleague values which dovetail with exactly what this programming is doing. I think it's as simple as that.

Myers: And those values are?

Hinton: Respect for people. Creating an inclusive environment. Those types of things.

Franzoni: In the words of Dave Thomas, it's the right thing to do. He said that truly in just about everything he ever touched or did. For me personally, I have lots of nieces and nephews. They come to my house and I go to their house and you sit down and watch television. And it was interesting to me how when you really think about it

over the last 10 to 15 years sitting in front of the TV, suddenly I'm finding myself with my five year old nephew going "I can't believe this is on at 8 o'clock." That kind of touched me in addition to just what we do as a company.

Kenin: Jack, you started to ask about the professional responsibilities and the personal goals being associated with this and I think a lot of the comments around the room have really shown that there is an intermingling of those two things. Certainly like Johnson & Johnson, Hallmark is equally involved with families, relationships, trust and quality. My first meeting with the senior people of the card company, that's all they wanted to talk about. They wanted to talk about the protection of this responsibility on the part of our channel and the kinds of goals that we had for creating broader entertainment targets and how we were going to do that in sympathy with these other goals. It was just a real lesson to talk to these people about that intermingling of these two goals, the professional goal of sustaining the company's reputation and the personal goals of the senior managers who are living that.

Alstrup: One thing we haven't brought up yet is our scholarship fund, which really is encouraging students to have internships at the networks or to develop scripts that are family friendly. I was asked to go to Yale to speak to an undergraduate class of management. I was discussing many of the

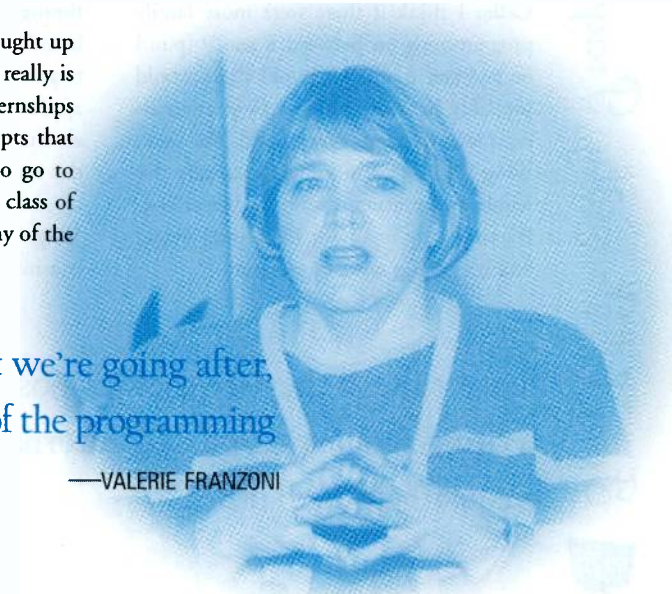
things that we do through our corporate philanthropy program, but I was talking about the family-friendly forum. Whenever I brought up the family forum and started talking about that they were fascinated. They were so impressed. They could not believe that advertisers were getting together for this. Then when I told them about Gilmore Girls, they were sitting around the table going, "I love that show-that's my favorite show". Then I said, "Well, we have something to do with it." I got emails back from them and they were just amazed...they had no idea.

Myers: What about Hollywood? What's been the overall reaction? You have the network programming departments. What about the writers, the agents-are they aware of what you're doing? Do you sense that there is interest, support and feedback from the Hollywood community?

Alstrup: I think with our awards event every year we have 750 people attending a luncheon in L.A. So we feel that the producers are there and it's quite a good turnout. I think that's certainly helped and

"As much as we have a very broad adult target that we're going after, we're always trying to balance what we do in terms of the programming that we go after, where we put our advertising."

—VALERIE FRANZONI



"I think if there were more family programming...there would probably be more support from advertisers. Not a question in my mind."

—BILL CELLA

I think that is the first and only event where advertisers are actually honoring programming that's done and it's not programmers giving awards to one another.

Cella: There's a lot of solicitation from the West Coast about what we're doing. There is a strong awareness on the West Coast on what the FFPF is doing. I think with the inclusion of CBS and ABC and NBC...Now it's a reality to them and they're eager to really be more involved.

Simmons: It's important that we not lose the momentum and that we continue to build on this success of having a show each of the first two years making the schedule. Because in many ways we empower the West coast community because they're all competing for the best writers. And if the writers' view is, "I've got to be controversial and titillating and push the envelope in order to deliver a hit," the networks are going to accept that to get that writer onto staff. Over time, if they see that it's possible to be successful writing shows that offer an alternative for family viewing, we just help each other.

Cella: I think if there were more family programming on between 8 and 9 [p.m.] or between 8 and 10 [p.m.] there would probably be more support from advertisers. Not a question in my mind. The other thing I want you to know is basically this whole organization is really a labor of love. It's very, very involved. It's getting bigger and it's getting more momentum.

"Over time, if they see that it's possible to be successful writing shows that offer an alternative for family viewing, we just help each other."

—BRAD SIMMONS

Myers: Can you identify a message that you can get out for the next 12 months in terms of support for your goals and efforts? What would you like to see happen most?

Franzoni: One of the things I'd like to see is we've got over 40 advertisers that are part of the forum and we've got 18 who are part of the script development fund, which I think is a key component in what helps drive the message that we get out there. We'd just love to see a lot more of our colleagues join the forum to help us.

Hinton: Week by week active participation.

Myers: What's it take to transition someone from that first level of involvement to the actual program development fund? What are the obstacles for more companies joining the program development fund?

Hinton: It's not an obstacle becoming a member of the forum. You pay a minimum annual due. As we solicit and try to encourage more of the companies to contribute to the script development fund—which is a minimum amount of money—many of these companies have to go through layer, layer, layer. They go to the brand marketing director, then they have to go to the vp of finance, then it has to get approval from the board. Which is absolutely amazing to me, because from this room's perspective it's top down.

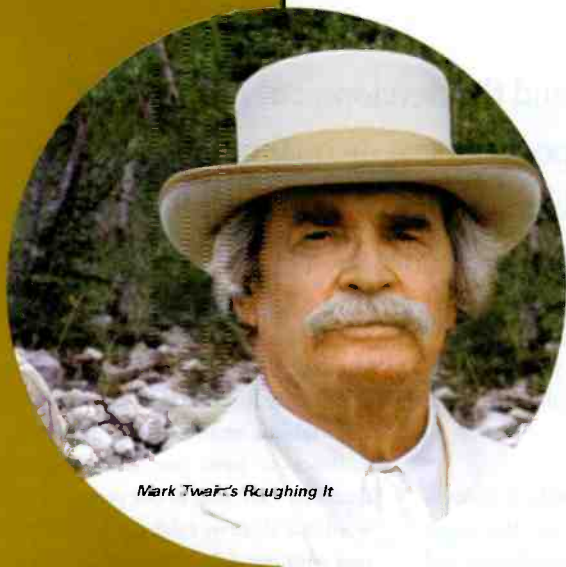
Jung: We as a company stepped up our commitment to all four of the areas in the

last two years, including the contribution of the script development fund and we did that for a very strategically ground reason. It wasn't to put \$50,000 on the table and show support. It was to create a broader environment that I can reach moms and kids at the same time appropriately. I don't have to do a kid commercial and an adult commercial. I can do one commercial for a brand and air it on *Gilmore Girls*. It's a matter of understanding what it can do for a company, what it can do for a media schedule and then having a champion within the organization to say this is the right thing to do, we've got the funds to do it.

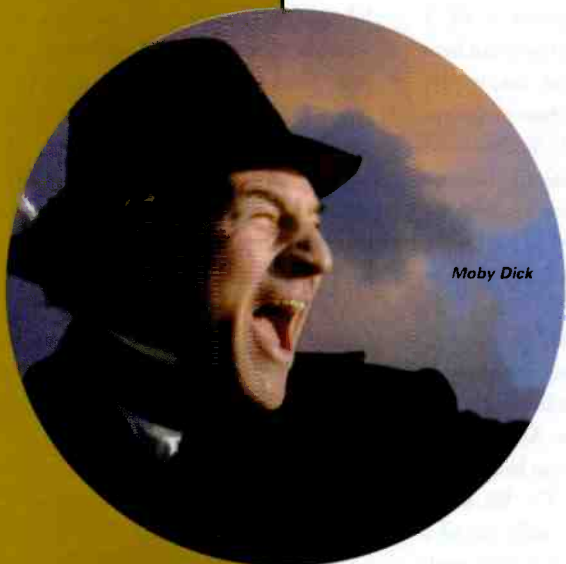
Hinton: Excellent point.

Simmons: And one of the things the forum tries to do is help. For those of us who have successfully sold it into our company, it's the right thing to do to help other companies with that road map.

WHERE GREAT STORIES COME TO LIFE



Mark Twain's Roughing It



Moby Dick



Jack and the Beanstalk: The Real Story

WORLD-CLASS
WRITERS,
POWERFUL
STORIES,
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AND
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“In both the acquisition phase and the development phases that we go through, there’s a very specific focus on quality but also on the responsibility that we have as being three of the strongest cable networks out there to bring positive messages to our viewers...” —LINDA YACCARINO

Hinton: Also, just simple things. Those forum members who are not contributing to the script development fund could put a link on their Web site that links directly to family-friendly programming, which will increase the visibility of our mission statement and some of the programs that we are involved in.

Myers: We have Turner Entertainment here and we have Hallmark here. Currently, as I understand them, the objectives of the FFPF are to support the broadcast networks and their prime-time development schedule. Are there plans to expand that out into the cable universe as well?

Simmons: We focused initially on broadcast, where the signal comes into the house and people haven’t necessarily voted by paying an additional fee for cable or pay per view. And we really focused on that 8 to 10 family viewing hour. Over time, because we do want to be as inclusive as possible, I think we may look for other ways to expand to cable, to print and other areas.

Cella: The focus here was to try and pitch as many people as we could to get the message out. Who knows what’s going to happen in the future.

Myers: Bill, you mentioned before that Verizon is focused on 18-34s. And the thought that immediately comes to mind when we think 18-34 is [MTV’s] The Osbournes and certainly edgier programming that would be attracting them. Do you find that your target audience watches family-friendly programming? Are there any indications that families are watching

programs together and can your programming encourage more families to watch together?

McCarron: Edgy is definitely a description of the programming on the target and, in fact, I think it becomes harder and harder to find 18-34 programs at all. I think many of us were in that position here because the demo is younger. Yes, we are finding success with some of these programs. Yes, we are on Gilmore Girls. Yes, we want more alternatives but we literally have to look at every episode. We see some of the programs that initially were fun on TV get darker and darker as well, and we’re monitoring that too.

As we’ve seen shows get better, audiences come back. When the show is better and the audience comes back, the audience is paying attention. And we have a very interesting phenomenon because we do a lot of direct response TV. We know when people are willing to walk out of a room on a show so we look at it from both sides. You’ve got to have a good show to hold the attention.

Myers: Linda, on that same point, Turner is purposely moving away from wrestling and that type of environment. How are you holding onto the 18-34 audience at Turner while you’re moving toward a different type of programming?

Yaccarino: The variety of our programming really does it. This fall we [TBS] come out with our new sitcom block, which has the best sitcoms of all time ranging from early fringe to access leading into prime time. And with the commitment in prime time, with the variety of originals and acquired movies, the focus is to

capitalize on 18-34 and 18-49. We can be a substitute for broadcast and I think now we’ve taken a second step in convincing the audience to have that confidence in us that. The third step in our plan is to get the word out there or raise the level of awareness with our first project with Johnson & Johnson in a variety of different ways, whether it’s through our publishing group with Time Inc. or through our interactive with AOL in a timely way.

Myers: Can you see the possibility of variety coming back or ensemble entertainment coming back, based on the success of Carol Burnett and others?

Cella: We’ve seen scripts that had music elements to them. We haven’t seen variety shows yet, but it’s really up to the networks to see where the creativity is at.

Myers: What haven’t we discussed? What are the issues that are out there?

Hinton: How do we as a forum—under the leadership of Andrea and Brad and the executive committee—keep the momentum going, keep the visibility up? Is there another way that we can make our presence known beyond just the advertising community and the media?

Cella: I think we’ve been wrestling with how we get this water mark exposed. We’ve had some adventures in trying to get that done and it’s been a challenge. But if we got our logo more exposed and in the program we’re involved with. And in network television or cable television, wherever it be, I think it would be great to step forward to have the viewing public really see what we are. To see the TNT logo or the

ABC logo, that's a real brand, so [by associating with those] strong brands here we'd get more exposure.

Myers: Do the advertisers involved from the FFPF have any benefits as the program expands? Do you have any long-term pricing benefits or do you negotiate in the open market with everyone else?

Alstrup: Nothing, nope. It's open market and it's part of what we each individually do with our agencies. I know it sounds corny, but it's really for the good of the American public and viewing.

Cella: I think the more research we do, we learn about ourselves.

Myers: For your closing comment. I'll just ask each of you to give me a summarizing feeling, it can be about a personal emotion, your business commitment or anything you want to add to the conversation.

Franzoni: The loss of Dave Thomas in January put us in a position as a company of figuring out how we are going to move forward and still carry on his legacy. That's the challenge. Being a part of this organization makes me realize we're going to all work together and we're going to get there and it's going to help benefit us in the long run. If there's any advertiser out there that would like to chat and just find out what we've been doing and find out how they can get involved, I am more than happy to take anybody's phone call.

Kenin: It's just personally fulfilling to be involved with this kind of programming and as the Hallmark Channel grows, we have a lot to substantiate in the last year. And I anticipate this year being the same. If we're able to create hit shows that are within this category—that would be a professional payoff.

McCarron: I think it's something that has crossed lines. At the start of this it was funny because we had all the telecommunications companies talking about trying to help the industry. We are competitors and it's tough to get shared ideas when you're competing. We also all want to know that we have done something that's personally rewarding. This is our personal reward. I know our company's objective is to be the most respected brand—we have to respect where we are putting our advertising and it's consistent. But it's personally rewarding too.

Kenin: And that the program becomes more and more successful in getting so much recognition that everybody is aware of the FFPF.

Hinton: We'd also like to deliver a 15 household rating.

McCarron: Why stop there?

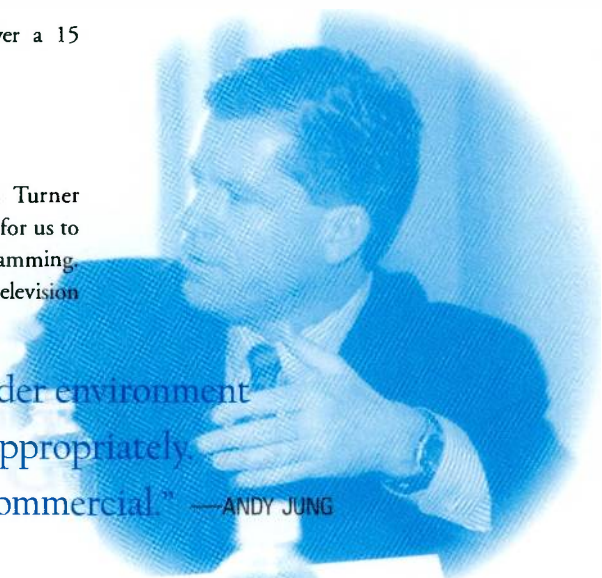
Yaccarino: On behalf of the Turner Networks it's a very exciting time for us to continue raising the bar in programming. Not just cable programming, but television

programming as a whole, with a very specific focus on quality. I think it's a simple goal: to help be a better partner to all of you in this room. To increase the opportunities and increase those number of scripts that go across your desks. To be another outlet for you to raise the level of awareness and increase the message out there.

Jung: I was just delighted to see something like this exist. Because it says that you can sit with a peer group and you're not alone, not only in thought about wanting to pursue the type of programming that I think is right but others think is right as well.

Myers: Andrea, industries need spiritual guides and you've become one for the television and advertising industry. All of the advertisers who are investing in the FFPF deserve recognition and thanks for their leadership. And a tremendous thank you to all of you here today for your comments and contributions.

“It [script development fund] was to create a broader environment that I can reach moms and kids at the same time appropriately. I don't have to do a kid commercial and an adult commercial.” —ANDY JUNG





THE NETWORK THAT CARES

SALUTES THE

FAMILY FRIENDLY

PROGRAMMING FORUM

FOR CARING.

WHERE
GREAT STORIES
COME TO LIFE



BY JON SEITZ

Does Bigger Equal Badder?

Consolidation of media ownership has some upside

THE U.S. COURT OF APPEALS RECENTLY REVOKED THE FEDERAL COMMUNICATIONS COMMISSION'S ban against ownership of cable systems and TV stations in the same market. The court also questioned the FCC's "arbitrary" 35 percent U.S. broadcast coverage cap on station ownership, opening the

door for either a higher-percentage cap—or none whatsoever—in the near future. At the same time, the FCC is reviewing rules barring cross-ownership of newspapers and broadcast TV stations in the same market.

These changes may ultimately lead to ownership of a broadcast TV network by a cable MSO, or to increased individual station ownership by TV networks, to newspaper groups owning more broadcast properties, and so on.

So here we go again with even greater media consolidation in the offing, a trend accelerated just a few years ago by the passage of the 1996 Telecommunications Act.

What could all of this legal wrangling lead to? How about Comcast/AT&T Broadband owning local television stations? Or perhaps AOL Time Warner doing the same?

With these and many other potential media consolidations to come, one wonders: Is this all bad?

Many think the answer is yes, worrying that even greater consolidation of ownership will ultimately lead to fewer information sources available to the public, while at the same time inflating advertising rates as fewer

entities control more media outlets.

I believe both of these concerns are invalid.

First of all, there is simply an incredible number of choices we all have to obtain information across every medium, including the Internet. Let's see, where do we get our first information of the day? Is it from the newspaper? From the Internet, television or radio? Or maybe it's from e-mail via a handheld. There has never been a greater number of information choices available to the public—more than most people seek out.

Second, remember when the 1996 Telecom Act paved the way for significant media consolidation? Many in the advertising industry thought this would increase ad rates, particularly as large entities owned multiple radio stations in a single market. Prices were supposed to rise because of the collusion and power that these aggregated groups of stations had. Some of the loudest complainers were the media-buying arms of the largest communications holding companies that were formed to take advantage of their economies of scale and buying clout.

It's now six years later, and prices have not

been fixed, rates are still negotiated fairly, and we all coexist in a relatively open marketplace. In fact, most radio-station groups still have an extraordinarily difficult time even positioning their group sales efforts, let alone controlling pricing. Ultimately, it is market conditions that drive rates. Price increases were prevalent when the economy was strong, and they are less so when it's weaker. Many stations, in large and small ownership groups alike, are for now suffering from the weaker economy.

This isn't to say that these mega-companies aren't changing the way commerce is done. They are, to be sure. Multiple-media ownership will make it easier to create powerful cross-platform deals across local TV, cable, radio, outdoor and print. If anything, the media has been slow to organize themselves to take advantage of their multiple-media largesse. But progress is being made. While media vendors iron out some of the kinks of the cross-platform sale, clients and agencies are also becoming more understanding and receptive to what the media companies have to offer.

We have recently seen more examples of cross-platform sales, both on the national and regional/local levels, an encouraging trend. In the end, media planners and buyers will still ultimately make those decisions that are based on the best values for their clients.

We should not fear a changing media environment. Change creates opportunities for forward-thinking agencies and advertisers.

Jon Seitz is cofounder and managing director of MayoSeitz Media, a strategic media agency in Blue Bell, Pa.. He can be reached at 215-641-8700 or at js@mayoseitzmedia.com. ■

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Media's New Mindset

In an exclusive survey conducted by *Mediaweek* and Spencer Stuart, broadcast, cable and print executives say they are adjusting to a consolidated agency world by aggressively crafting cross-platform sales operations BY MICHAEL BÜRGI

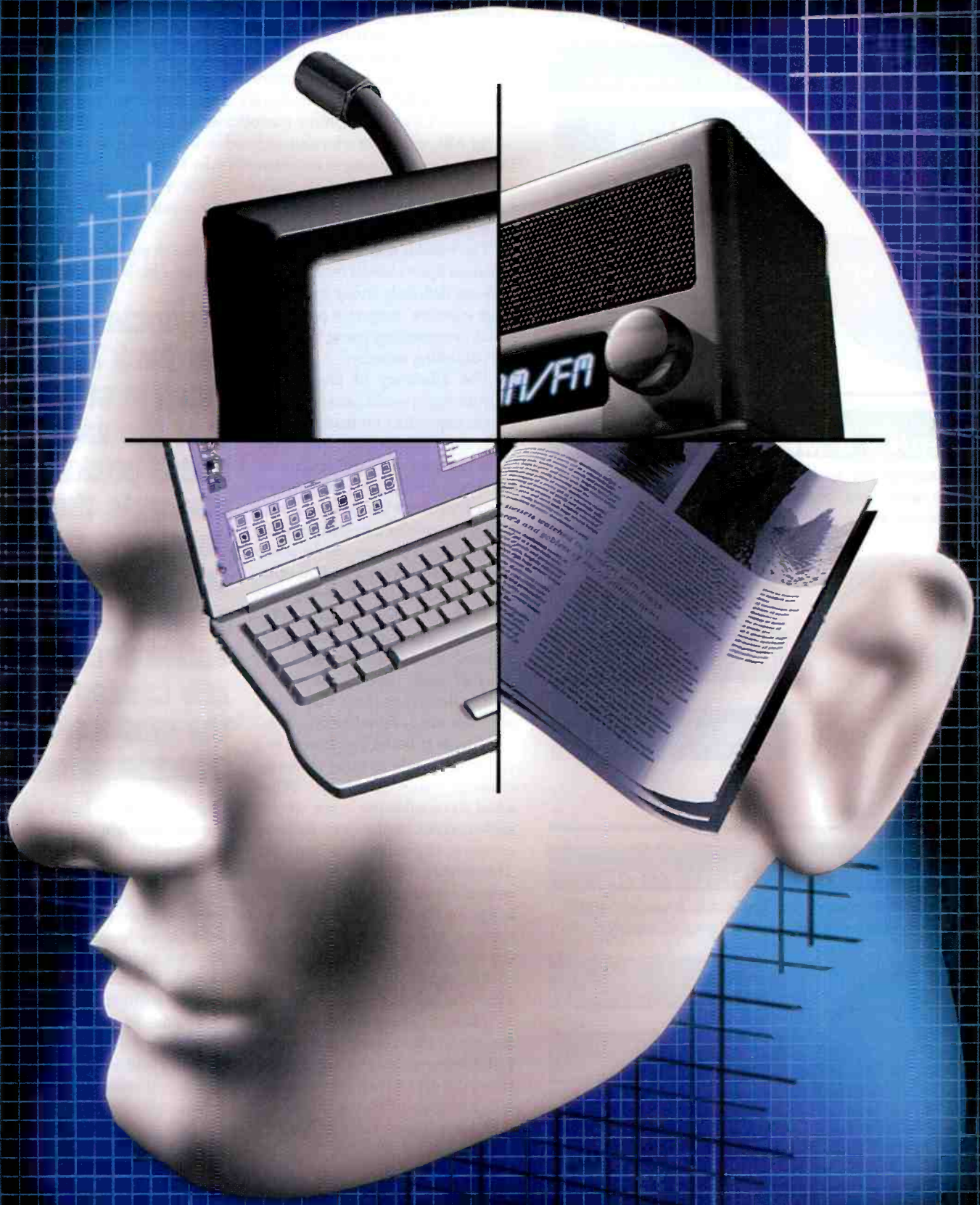
Now that the broadcast networks have presented their fall programming schedules, the ad sales executives at the major media conglomerates that own the nets are nervously drumming their fingers on their desks waiting to see just how soon the \$10 billion national TV upfront marketplace will break open. It's generally believed that once it does, the television industry (including cable, syndication and spot TV) will see advertising commitments for next season rebound from last year's "correction" market. Meanwhile, executives in all the other major media hope that if things go well for the TV business, the uptick in the upfront will rub off on their businesses and everyone can all go back to living in the land of revenue gains.

Still, there are a lot of "ifs" out there that will be answered over the next two months. To get an indication from the media companies about what their hopes, concerns and expectations are for the duration of 2002, executive search firm Spencer Stuart, in association with *Mediaweek*, surveyed executives at large media companies throughout the U.S. and Canada.

First, the good news: Nearly half of the survey's participants believe this year's revenue environment will improve by 6 percent or more. Now for the bad: Four out of five respondents said that the economy continues to be the greatest threat and challenge to their business. It seems everyone is so fixated on where the economy will go that many have forgotten to keep an eye on the company across the street: Less than 40 percent of the media executives surveyed cited competition as a threat or challenge this year.

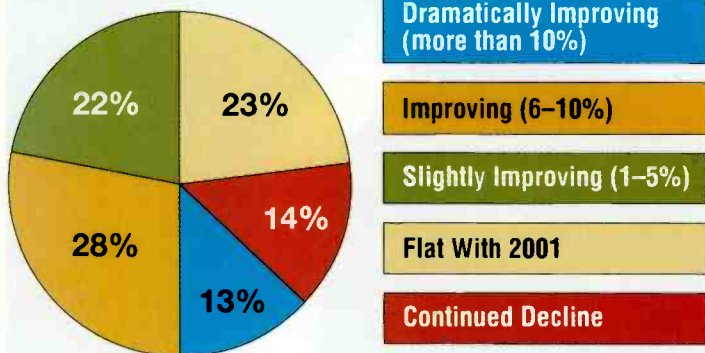
The most striking development seen in the survey results is the unanimity with which media executives say they are "bundling" their media assets in cross-platform configurations to more effectively drive revenue. Due to continued concern about the economy, and also because of grow-

ILLUSTRATION BY GIACOMO MARCHESI



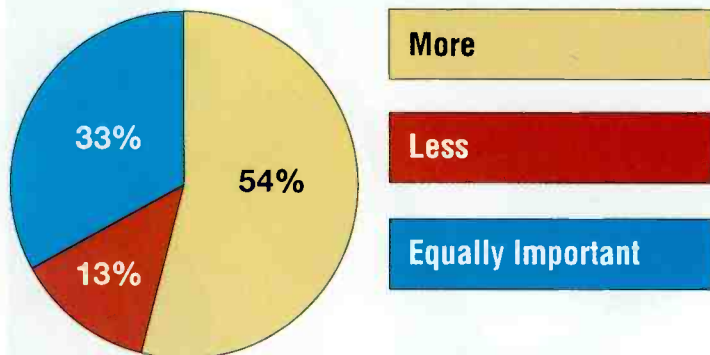
ing consolidation in the advertising and media agency world, 86 percent of respondents said they are developing cross-platform sales operations. Though cross-platform sales divisions were already being put together at many media companies in the late '90s, 60 percent of respondents said that over the past year, the changing environment has

2002 REVENUE ENVIRONMENT



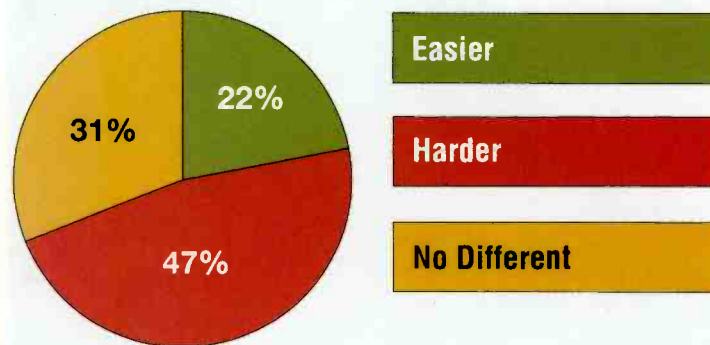
CHOOSING A MEDIA PARTNER

Has quality (defined as size and targetability of specific media offering) become more, less, or equally important as cost efficiency for your customers in choosing a media partner?



EFFECT OF CONSOLIDATION

Has consolidation in the agency business made it easier, harder, or no different to negotiate the right deal for your company?



created the need for more creativity and alternative-selling solutions such as cross-platform offerings.

A senior executive at Fox who participated in the survey but declined to be identified said his most immediate concern is the "four or five media-buying conglomerates [that] have gotten together in order to be more efficient in the marketplace. While last year they weren't sophisticated, this year they are more strategic and more effective in thinking through their strategy, and therefore now represent this huge monolith to contend with." Put another way, it's simply harder for media companies to work with bigger, more consolidated agencies than ever before.

An ABC executive who also declined to be identified explained that the recent restructuring of his network's sales force was done to "reflect the changes occurring in the marketplace... We've set up teams, and each team has a responsibility for a few holding companies and each agency's client roster."

The trend is not limited to electronic media. A publishing executive at Vulcan Sports Media (whose products include *The Sporting News*) said: "We are definitely trying to develop more effective integrated programs, which is something going on across the publishing industry."

The efficiency of cross-media platforming in media sales is to some degree dependent on market conditions, the Fox executive noted. "New cross-platform deals are attractive to the media [companies] who present them when there is less demand than supply for product, so that they can put together a product mix by which they can discount some of their offerings," said the exec. "However, when demand is strong, this approach becomes less appealing for media. Consequently, companies with a broader array of assets have an easier time cutting deals than those that have a narrower band of product offerings."

"Bigger Is Better" appears to be a common thought in many media executives' heads these days. When

asked if consolidation in the advertising and media agency business has made it easier, harder or no different to negotiate the right deal for their company, 47 percent of the survey respondents said it is harder (see chart). The primary reasons: 1) Sellers now need to contact and deal with higher-level executives in the agency—who they believe are able to see what's better for the client, with less focus on costs and price-per-point—but these top execs are harder to reach; 2) It's difficult to do something special for individual clients when the agency has so many competitive clients; and 3) When the focus is on price only, the ability to create a higher-impact (but more costly) program or deal is limited.

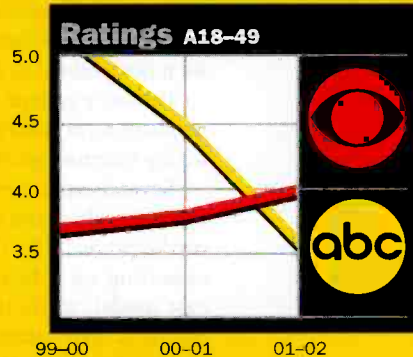
Those frustrations have led media companies to reach out more directly to client companies in trying to lure their dollars. More than half the respondents said they engage with both client and agency contacts in order to create the best media package. Another factor in the direct-to-client trend is that as agencies have consolidated and have cut back on personnel, they have also scaled back the services they used to offer.

"Agencies are stretched so thin that they're not quite as capable of evaluating multimedia programs, [so] that today publishers are going directly to clients and bypassing agencies," noted the Vulcan Sports

"Agencies have cut back so much in staff that the value-added packaging concepts they used to develop are not being presented. Innovative proposals are coming from the media side."

Reaching Adults 18-49 is as easy as ~~abc.~~ CBS

In the ratings—



or the rankings...

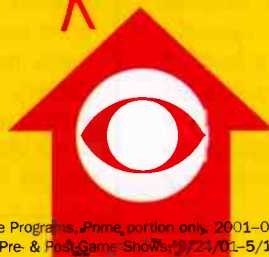


*Monday Night Football

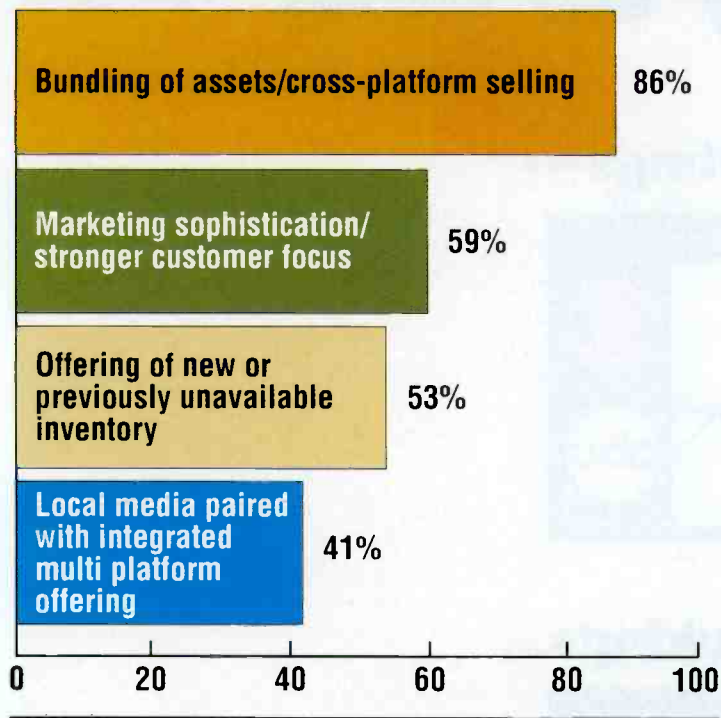
CBS outdelivers ABC.

No matter how you look at it, CBS is ahead in A18-49 as ABC plummets -31%. We're doing it with a smart development strategy that's put us ahead in the Top 25, while ABC loses ground rapidly. Combine that with the strength of our new lineup, and CBS is the network to watch.

CBS. Go ^uby the numbers.



TOP PRACTICES EMPLOYED TO DRIVE REVENUE



Media executive. "There's a push on publishers to more closely address the needs of clients without the help of ad agencies."

The Fox executive added that "agencies have cut back so much in staff that the value-added packaging concepts they used to develop and present are not being presented by them, as a result of a shortage of manpower. Innovative proposals are coming from the media side."

In the survey, 82 percent of the respondents said they have changed the manner in which they deal with clients. A senior executive at AOL Time Warner pointed out that the sales side of his company is even adding positions that reflect the reality that the client needs to be addressed more directly. "We now have teams of very senior people focused on developing consultative relationships with more major clients," said the exec, who requested anonymity.

There's also a push on to establish closer ties to senior marketing executives at the client companies, from vice presidents on up to chief marketing officers. "This level of client executive's function is to understand the strategy of the marketing plan—[that] it's not necessarily driven by price" as most agency-media negotiations are, said one survey respondent.

The rationale behind strengthening direct contacts with top marketing execs is also in part to "increase client coverage to access [media] budgets prior to agency deliberations," another survey respondent said.

The survey reveals that media companies feel that clients' attitudes toward them have changed over the past year. Seventy-seven percent of respondents said clients' reduced media budgets have influenced their need to sell more effectively. Lower spending by clients also led 54 percent of the survey respondents to say they believe quality (defined as size and targetability of a specific media offering) has become more important than cost efficiency to customers in choosing a media partner (see chart on page 28).

Survey participants were also asked which companies are their toughest competitors. Interestingly, companies that have moved further ahead in integrating their varied media properties into cohesive sales options were cited. ESPN/ABC Sports was mentioned by several companies; Viacom and Condé Nast Publications also were named.

One disturbing note voiced by a minority of survey participants was a feeling of lack of control over their businesses and media in general that has developed since Sept. 11. It's left some media executives feeling that they can no longer see around the corner.

"The world of advertising sales has changed radically over the past year," bemoaned one senior vp at a major media organization who did not wish to identify his company. "Prior to September, you knew how the year would evolve in terms of TV and print advertising. But now we react to what our competition is doing. Only when someone else acts are we more inclined to follow."

Echoed a general manager at another media organization: "There is no planning in advertising today—we and our competitors are exhibiting totally reactive and defensive behavior."

Several executives suggested that the media business needs to adapt more quickly to the rapidly evolving marketplace. "The [TV] industry is operating on a 40-year-old broadcast model, while the dynamics of business are dramatically being altered," said the Fox exec. "We'll have to become more technical about how we evaluate demand versus the way everything was done even 20 years ago. Historically, demand from year-to-year had some pretty regular trending, so demand could be predicted pretty easily. But that's not the case today, and the use of historical trending is no longer a viable tool to rely on."

Bottom line: The business is inexorably changing, perhaps more so than at any time in the history of media selling and buying. The tough times that media companies have struggled through over the past year may end up having a Nietzschean effect: that which does not kill them is making them stronger. "This is a much more difficult environment than we've faced in the past, and it won't turn around in the immediate future," said the AOL Time Warner executive. "So we need to focus on the relationships and be patient that what we're doing now will pay dividends when the market returns." ■

"There is no planning in advertising today—we and our competitors are exhibiting totally reactive and defensive behavior."

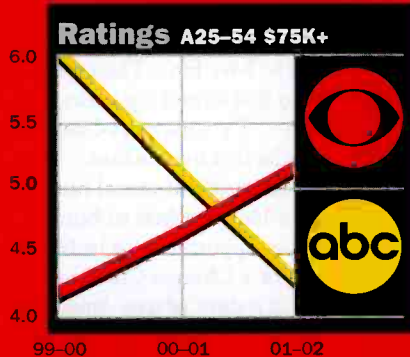
Who the Survey Polled:

Spencer Stuart sent a survey in April to 450 media executives at companies that took in close to \$200 billion in ad revenue in 2001. Of the 68 respondents, 34 percent work in magazines; 33 percent are in cable; 31 percent are in network TV; 18 percent are in TV syndication; 18 percent are in newspapers; 12 percent are involved in the Internet; 10 percent are in radio; and another 6 percent classified themselves as in other media (respondents were asked to select all answers that applied). Of the respondents, 18 percent are CEOs/GMs; 21 percent are presidents; 40 percent are either vice presidents, senior vps or executive vps; 15 percent are publishers; and 6 percent fall into other categories.

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In the ratings—



or the rankings...



CBS outdelivers ABC.

CBS soars with a +21% gain in A25-54 \$75K+ as ABC slides -28% in the same demo. We're doing it with a smart development strategy that puts us ahead in the Top 10. Combine that with the strength of our new lineup, and CBS is the network to watch.

CBS. Go ^uby the numbers.



Source: NTA-NAD, AA% change based on Regularly Scheduled Primetime Programs 2001-02 vs. 1999-2000 (9/24/01-3/31/02 vs. 10/2/00-4/1/01 and 9/20/99-3/26/00) for A25-54 with Household Income \$75,000+. Ranking based on 9/24/01-3/31/02. Subject to qualifications available upon request.

Media Elite

EDITED BY ANNE TORPEY-KEMPH

Quicktakes

THE TV LAND CREW met up with **Mary Tyler Moore** in downtown Minneapolis recently for the unveiling of the MTM statue on the Nicollet Mall. MTM in the flesh engaged a crowd of fans by telling the back story of the memorable show-opening tam-toss. The day they filmed was so cold that her lips were frozen. "Otherwise I would have objected when the director told me to stand in the middle of the street to throw my hat into the air," Moore said. The statue presentation was the second effort under the cable network's TV Land Landmarks initiative, which honors television legends and the cities and towns with which they are closely identified... You hear cover girl with pigtails and pom-poms and you think, maybe, *Parenting*...or *Playboy*. But you'd be way off. It's the June issue of *Mutual Funds* that has the cheerleader on the cover, to hype the new 529 college savings plans. **Jennifer Ortez**, the underage cover model,



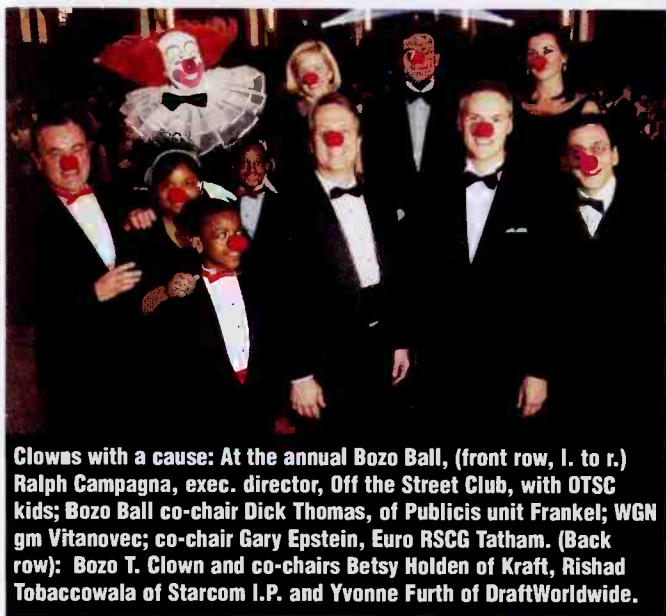
Stand-up gal: MTM at TV Land's statue dedication

Ortez had an early call at Rockefeller Center the next morning in the pouring rain—to do a cheer written by *MF* m.e. **Jim Curren** on NBC's *Today* show: "Say hey, you know, college can bring financial woe..." Those *MF* folks really know how to have fun... The recent Bozo Ball scored big bucks for WGN-TV Children's Charities with its first live auction. Attendees at the annual fundraiser bid on tickets to Europe and an opportunity to be ball boy for a Chicago Cubs game. But in a show of true American spirit, some of the fiercest competition came over the walk-on role in a McDon-ald's commercial, which went for \$6,500. The other surprise for the organizers: About 50 people pledged \$500 each to "Be a Champ,

Send a Kid to Camp." Said **John Vitanovec**, vp/general manager of WGN and general chairman of the ball: "While there may be a lot of clowns in the industry, at the Bozo Ball, we clown with a cause—raising funds for

Chicago's kids."... **Barry Diller** was on the breakfast menu recently in Conde Nast's private dining room. The chairman & CEO of USA Interactive and chairman/ CEO of Vivendi Universal Entertainment was the latest media honcho to be interviewed by *The New Yorker* staff writer Ken Auletta for CN's "New-house in New York" breakfast series. Auletta, along with sponsors UBS Warburg and Cushman & Wakefield, served up Diller to a media star-studded crowd including Howard Stringer of Sony Corp. of America; Infinity Radio chief John Sykes; Edward

Bleier of Warner Bros.; CNN's Myron Kandel; and Showtime chief Matthew Blank. Among the highlights, Diller defended the leadership and stock of (continued on page 34)



Clowns with a cause: At the annual Bozo Ball, (front row, l. to r.) Ralph Campagna, exec. director, Off the Street Club, with OTSC kids; Bozo Ball co-chair Dick Thomas, of Publicis unit Frankel; WGN gm Vitanovec; co-chair Gary Epstein, Euro RSCG Tatham. (Back row): Bozo T. Clown and co-chairs Betsy Holden of Kraft, Rishad Tobaccowala of Starcom I.P. and Yvonne Furth of DraftWorldwide.

couldn't join in all the festivities at the recent party at O'Flaherty's Ale House in New York to mark the six-month anniversary of the mag's redesign. Which was just as well, since

Movers

NETWORK TV

Regina DiMartino has moved over from senior vp, marketing and promotion at ABC Daytime to a similar position, senior vp, marketing, advertising and promotion, at cable sibling ABC Family Channel. DiMartino will report to Angela Shapiro, the channel's president... **Ellen Flahive** was promoted to executive director of the PBS Sponsorship Group, public television's national underwriting sales force. Flahive joined the New York-based group last December as national sales director.

CABLE TV

Fox Cable Networks Group hired three new affiliate sales executives. **Jessica Fang** was named manager, national accounts in the affiliate sales and marketing department; **Mary K. Fitzgerald** was named manager, affiliate business affairs; and **Lance Reiss** was named manager, affiliate marketing in entertainment, affiliate sales and marketing... Cable rep firm National Cable Communications has named **Greg Goldman** sales manager for a new sales team in the company's Atlanta office. Goldman was most recently a senior account exec at WAGA-TV, Fox's owned-and-operated station in Atlanta.

RADIO

Mike Rizzo has been promoted to general manager of news and sports coverage for ABC News Radio. He was previously executive producer of sports for ABC Radio Networks... **Dave Gordon** was promoted to general manager for KLUP-AM and KSLR-AM, Salem Communications' two stations in San Antonio. He was formerly operations manager for KSLR and was also serving as interim general manager... **Leslie Bauer** has been named chief information officer of Radio One. She joins Radio One from food distributor U.S. Foodservice, where she was chief information officer... **Muriel Funches** was promoted to vp and market manager for Clear Channel radio in New Orleans. Funches was formerly vp and general manager for KHM-FM and KODA-FM in Houston... **Michael Pallad** has been named local sales manager of WQCD-FM, Emmis Communications' (continued on page 34)

We're Different
Than Our Competition...



(continued from page 32) Vivendi, and argued for media deconsolidation of the television industry, saying, "There's a real argument to be made for the separation of production and distribution." He wowed the crowd when he cited his favorite TV shows—MTV's new



Spreading his style to *In Style*: Fekkai

reality-with-rockers hit *The Osbournes* and NBC sitcom *Will and Grace*. But Diller got an even bigger reaction when he criticized movie mogul Harvey Weinstein's "tactics of threats."...**Frédéric Fekkai**, that champion of casual chic, has joined *In Style* as contributing editor, giving his expert advice on beauty and lifestyle topics. Making his editorial

debut to the masses in the May issue, Fekkai offers dozens of tips on embracing the freedom that comes with summer—"Ditch the foundation...banish the blow-dryer...go for gossamer fabrics and cheerful tones." The celebrated stylist will write a number of columns for the Time Inc. monthly...It was a dirty job, but someone had to do it. So **Michael O'Hagan**, ever the dedicated professional, stepped up—well, actually, he was "volunteered" by his boss—to model for an *FHM* May-issue feature on eliminating all kinds of body odor. The *FHM* ad sales assistant was initially intrigued by the possibilities, but then the reality set in: The shoot involved being "made up" with quarter-sized zits and sweat-stained T-shirt and set upon by a swarm of rubber flies. O'Hagan sent a bunch of issues to his mom, who proudly showed them around her office. When *Mediaweek* tried to reach O'Hagan for comment, he was out of the office. We're guessing either his co-workers barred him from the premises—or he was off at a business lunch with the people from Body Mints. ■



Model employee: *FHM* sales assistant O'Hagan

Movers

(continued from page 32) station in New York. Pallad was most recently New York sales manager for Katz Radio, a rep firm of Katz Media...**Morgan Bohannon** has been promoted to market manager for Clear Channel radio's cluster in Greensboro, N.C., from director of sales...**William Gerski** has been named vp of independent distribution for Sirius Satellite Radio. He was previously senior vp of sales and marketing for Golden Sky Systems, a Kansas City, Mo.-based provider of satellite TV services.

NEWSPAPERS

Anders Gyllenhaal will move within the McClatchy Co. to the *Star Tribune* in Minneapolis as senior vp and executive editor, from *The News & Observer* in Raleigh, N.C., where he was executive editor. Gyllenhaal, who joined *The News & Observer* as metro editor in 1991, will replace Tim McGuire, who is retiring. **Melanie Sill**, managing editor of *The News & Observer*, will succeed Gyllenhaal as executive editor in Raleigh. Sill was project editor for "Boss Hog," the investigative report that exposed the environmental hazards created by North Carolina's powerful hog industry, and winner of the 1996 Pulitzer Prize for public service.

MEDIA

E.W. Scripps Co. has tapped **Lori Hickok** as vp and controller, effective June 1. She was the company's chief corporate development analyst.

MAGAZINES

Jack Findley Jr. has been named vp/Western regional manager/newspaper relations for *Parade* magazine. He will be based in the magazine's Los Angeles office. Findley had been publisher and CEO of *The Press-Telegram* in Long Beach, Calif., and before that he spent five years as president and general manager of Charleston Newspapers in Charleston, W. Va....**Dennis Publishing** continues to shuffle its personnel. **Jason Wagenhelm**, previously national sales director for *Maxim* online, has been



Findley to handle *Parade* relations



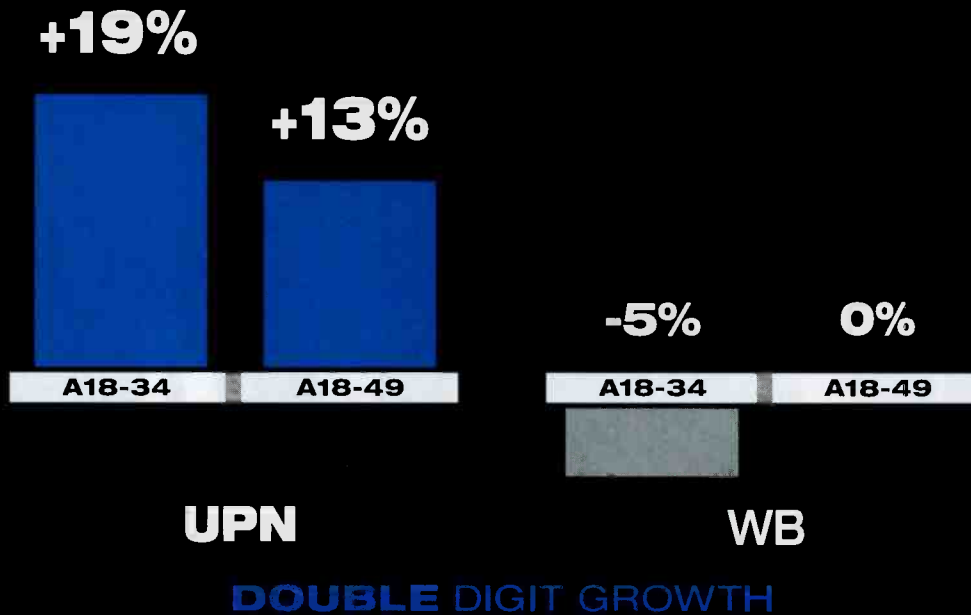
Yarus takes *USA Weekend* shift

named associate publisher for *Blender*, a new position. **Andrea Parr** will leave the position of associate marketing director at *The Week* for the same position at *Blender*...*The New Yorker* has promoted **Marie Wolpert**, formerly advertising manager, and **Peter Zuckerman**, previously national sales development manager, to ad directors...*USA Weekend* has named two vps of advertising sales. **Robert Harrison**, formerly director of ad operations/Consumer Direct, will manage the New York ad sales department for the Sunday-newspaper magazine. And **Bette Ann Yarus**, previously director of automotive sales at *USA Today*, will oversee the Los Angeles, Chicago and Detroit sales offices...**Michael Zivyak** has been named associate publisher at *Yahoo! Internet Life*, replacing John Weisgerber, who left to become vp of custom media/sales at *Forbes Inc.* Prior to joining the Ziff Davis Media title, Zivyak was eastern ad director and director of special sections for *Imagine Media's Business 2.0*...*Vibe* has named **Angelo Ragaza** as executive editor. Ragaza was most recently deputy editor of HIV-themed magazine *POZ* and prior to that was editor in chief of *A Magazine*, a title that targets Asian Americans. Ragaza replaces O.J. Lima, who left to pursue other interests...**Debbie McHugh** has returned to Fairchild Publications' *Jane* as managing editor after a brief stint at *Primedia's Seventeen*. McHugh replaces editor/m.e. *Andrea Rosengarten*, who recently resigned from the women's monthly.

RESEARCH

Lisa McCormack has been named managing director of the Washington, D.C., office of marketing and media research firm *Currie Jennings*. McCormack was formerly director of publications and online communications for the Republican National Committee and recently completed a fellowship at Harvard University.

Just Ask The Audience



- **UPN Beats The WB In Key Adults And Viewers**
- **We're The Fastest Growing Network On Television**
- **With The Strength Of Our New Lineup, UPN Is Turning Up The Heat**



Source: NTL, Primetime, All Programs, 9/24/01- 5/12/02 vs 10/2/00 - 5/13/01, A18-34 AA% and A18-49 AA%, growth based on percent change. Includes preliminaries, subject to qualifications available upon request.

TURN IT UP

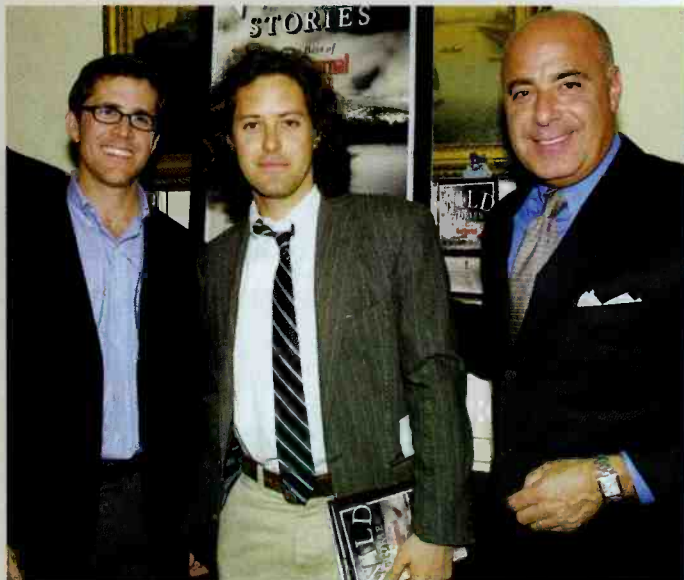
Media Elite

Media Dish

Capping off Self Day, the annual event encouraging women to devote more time to themselves, with a party at New York nightspot Eden, (l. to r.) Summer Sanders, NBC *Today* show contributor and Olympic gold medalist; Perri Peltz, founder, Giraffe Media; Jane Hanson, anchor, WNBC-TV's *Today in New York*; and Lucy Danziger, editor in chief, *Self*



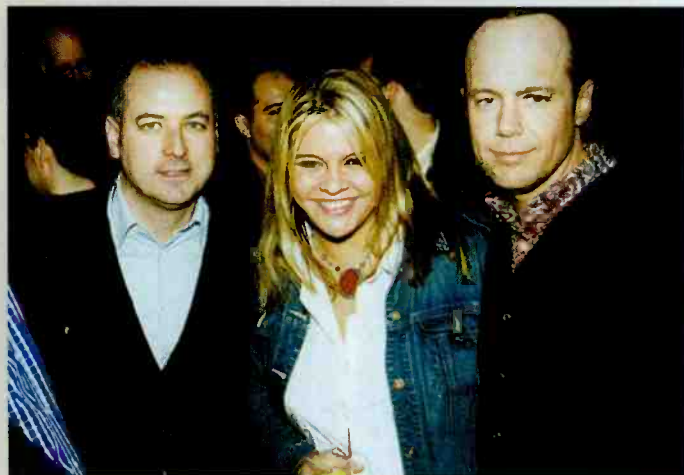
Comedy Central recently hosted an intimate dinner at 320 Park in Manhattan for some of the cable net's key advertising clients. Highlights included *Daily Show* host Jon Stewart interviewing former New York City Mayor Rudy Giuliani. (L. to r.) Giuliani; Rory O'Dea, CC account exec; and Steve Margosian, executive vp, Busch Media.



At the Manhattan home of writer George Plimpton for the recent *Men's Journal* "Wild Stories" book-release party, (l. to r.) Sid Evans, editor, *MJ*; David Lauren, senior vp of advertising, marketing and corporate communications, Polo Ralph Lauren; and Kevin Martinez, *MJ* publisher.



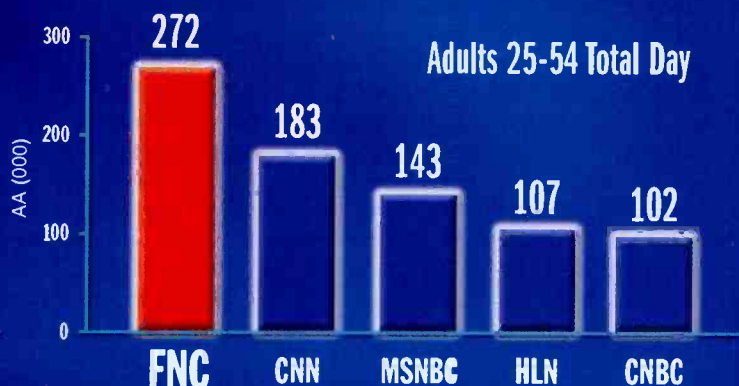
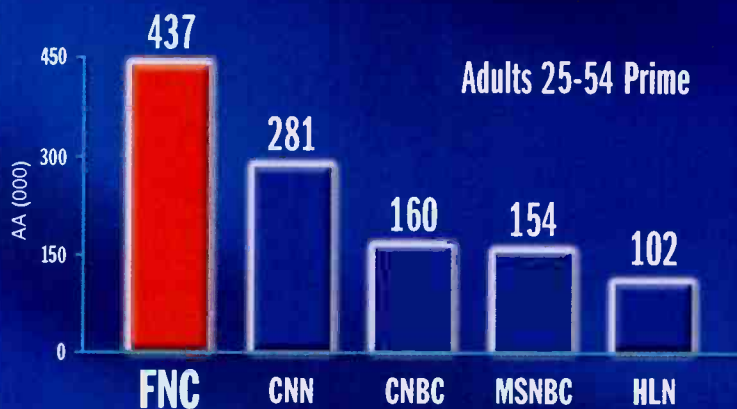
At New York's Soho Grand for the pre-event reception to Jungle Media Group's MBA Jungle Business Plan Challenge, Tim Reis, *Forbes* vp of sales development (l.) with Jon McBride, Jungle Media Group co-founder



New York Magazine recently hosted a party at Manhattan's B Bar to celebrate its annual "Gay Life Now" issue. (L. to r.) Alan Katz, publisher, *New York Magazine*; Stephanie Rudnick, senior P.R. manager, Rogers & Cowan; and Craig Harden, vp media and public relations, Ann Taylor

No Year-Old Cume Stories. No Out-of-Home Assumptions. No Spin. Just Nielsen Facts... Guaranteed.

For First Quarter 2002, FOX News Channel was the **#1** cable news network in Adult 25 - 54 audience delivery, especially upscale Adults 25 - 54!



To schedule a presentation regarding FNC's performance in the Mendelsohn Affluent Survey, the Beta Research Brand Identity Study, or the MARS Pharmaceutical Study, please call Kevin Brown, VP Eastern Sales, at 212-301-5412.

We report.



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Inside Media

NEWS OF THE MARKET

Zalaznick Takes Universal Post

Indie film producer and former VH1 programming executive Lauren Zalaznick has moved to Universal Television to serve as president of Trio and executive vp of Universal Television's Emerging Networks division. She replaces Bill Haber, who will continue on as a consultant to the network. At VH1, Zalaznick was senior vp of original programming and development. Zalaznick is credited for the production of concert series including *VH1 Divas Live!*, *The VH1 Fashion Awards* and *My VH1 Music Awards*, as well as original series *Bands on the Run* and *Strange Frequency*. She worked on *Pop-up Video* and *The List* and also launched the original films division in 1998. Zalaznick's theatrical film credits include *Zoolander*, which was the first Paramount Pictures/VH1 production; Larry Clark's *Kids*; Todd Haynes' *Safe* and Jim McKay's *Girls Town*. Zalaznick will focus on maintaining the digital network's brand as an arts and pop-culture channel.

SoapNet to Revamp On-Air Image

Aiming for a more contemporary image, SoapNet plans to introduce a new on-air look on June 9. The revamp will affect the logo, IDs, Web site, promotions, programming breaks and interstitials and will include a new color palette. "The redesign reflects the passion our viewers have for the network and the genre," said Deborah Blackwell, general manager of SoapNet. SoapNet's

prime-time schedule includes ABC daytime drama *Port Charles*, *All My Children*, *One Life to Live* and *General Hospital*. Original talk show *SoapCenter*, with co-hosts Lisa Rinna and Ty Treadway, is set to launch in June.

Carmichael Rides Off With Kelly Grand

At last week's MPA Kelly Awards, sponsored by the Magazine Publishers of America, Carmichael Lynch of Minneapolis walked away with the \$100,000 grand prize for its Harley-Davidson "2002 Motorcycle Campaign." Other big winners included Portland, Ore.-based Wieden + Kennedy, which won the Gold Kelly Award for its Nike Footwear "Storm" campaign, and DDB Dallas, which was awarded the Silver Kelly for its McIlhenny Co. "Tabasco Labels" campaign. The event was held in New York at Pier Sixty, Chelsea Piers. Each year, the Kelly Awards celebrate outstanding magazine advertising and the creative teams that produce the best consumer magazine ad campaigns. The MPA Kelly Awards are named for Stephen E. Kelly, a former MPA president and promoter of creative magazine advertising.

NatGeo to Relaunch Kids Mag

National Geographic World, the 26-year-old children's magazine, will relaunch as *National Geographic Kids* in October and for the first time will be sold on newsstands. The issue also marks a shift from corporate sponsor-

Calendar

The **National Association of Black-Owned Broadcasters 26th Annual Spring Broadcast Management Conference** will be held May 24-29 at Maho Beach Resort and Casino, St. Maarten, N.A. Contact: 646-424-9750.

The **SCTE Cable-Tec Expo** will be held June 4-7 at the Henry B. Gonzalez Convention Center in San Antonio. Contact: 800-542-5040.

The Radio Advertising Bureau will present the **Radio Mercury Awards**, recognizing outstanding creative talent in radio advertising, June 6 at New York's Waldorf-Astoria. Bill Ludwig, chief creative officer of Campbell-Ewald, is chief judge. Contact: 212-681-7207.

The **All-Star Salute to the Museum of Broadcast Communications** will be held June 15 at the Hilton Chicago. The benefit will celebrate the 15th anniversary of the museum, founded by radio and TV personality Bruce DuMont. Speaker of the House Dennis Hastert will serve as honorary chair. Contact: 312-629-6038.

The **PROMAX/BDA Conference and Expo** will be held June 26-29 at the Los Angeles Convention Center. Keynote speaker will be Turner Broadcasting System CEO Jamie Kellner. Contact: 310-788-7600.

The **ANA/AAAA Marketing Conference and Trade Show** on July 15-16, 2002, at the New York Hilton. Highlights will include a Forrester/ANA study presentation on marketing automation, an IRI presentation of a year-long study on what brands and messages work best in the online arena, and a McKinsey presentation about digital marketing. Contact: 212-697-5950.

The Cable and Telecommunications Association for Marketing will present the **CTAM Summit** July 14-17 at the Hynes Convention Center in Boston. Keynote speakers will be Mel Karmazin, president and COO, Viacom; and Sergio Zyman, chairman and founder, Zyman Marketing Group. For more information, visit www.ctam.com.



MH Takes Best Shot at 40-64

Men's Health magazine will publish a newsstand-only special issue skewing older called *Best Life*, after its German version of the same name proved popular. *Men's Health* publisher Rodale on Nov. 12 will distribute 400,000 copies at a cover price of \$4.99, with emphasis on the top 10 markets. The title will be promoted at airport kiosks, in regular *MH* issues, on aol.com and in other Rodale magazines. *Best Life* will expound upon the editorial topics featured monthly in *MH* and will be geared to men ages 40-64. "Whereas in *Men's Health*, fitness might be about building the body to look great, *Best Life* would cover fitness as a healthy lifestyle," says *Men's Health* publisher

It worked in Germany, so *MH* is bringing it here in November.

Mary Ann Bekkedahl. *MH* has chosen to pursue the older market because "this is the year when the 40-64 bracket surpasses the 18-39 bracket not just in consumer power but by sheer volume," says Bekkedahl. Depending on its acceptance, *Best Life* could become a quarterly, as the German edition did following its debut in November 2001.



Network sitcom



Network movie



Court TV's Forensic Files

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According to Nielsen, Court TV viewers tuned in for an average of over 21 minutes during primetime without changing channels – third best among all cable networks⁵. And if you want your spot remembered, put it on Court TV. A recent Court TV/ASI study has shown the same commercials got higher recall scores on Court TV than on several network primetime shows. For similar results, here's a number you won't want to forget – Charlie Collier at (212) 973-2834.

COURT TV
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Mag Research Gets Involved

What if magazine media planners could factor in readers' involvement with a given title into their clients' plans? Britta Ware, U.S. research director at *Reader's Digest*, believes she has come up with such a research tool, and for the last few months Ware has been visiting agencies to explain what's being called the Involvement Index. Using Mediamark Research Inc. data, the index reveals the depth of reader connection expressed in a single number, using three key qualitative statistics: average reading time; four out of four issues read; and "one of my favorites." Though the current incarnation of the index addresses only those three stats from MRI, agencies can build their own index(es) using any MRI criteria, then measure any demographic with it.

"Everybody's been waiting for this to come around," said Joanne Burke, executive vp/director of consumer strategies at Carat, who said she would be more skeptical of the index if it were not using MRI data that can be filtered through such third-party magazine research vendors as IMS and Telmar. "It's being coded into the third-party [software] with some flexibility, so we can run the index any way we want to," Burke noted.

The sample chart shows a hypothetical media plan that has

ships, by the likes of Minolta and Pizza Hut, to traditional display advertising pages. Rainer Jenss was made associate publisher to oversee the new platform. *NG Kids* is an interactive general-interest magazine with 700,000 circulation, reaching primarily the 8-to 14-year-old tween market.

Talk America Adds Crim, Farber Shows

Talk America Radio Network recently announced that it has added radio personalities Mort Crim and Barry Farber to its lineup. Crim, a well-known journalist and radio voice, hosts two daily shows broadcast on more than 1,200 radio stations, the five-minute *News You Care About*, and *Second Thoughts*, a 90-second feature devoted to humor and personal anecdotes about human nature. TARN has also added *The Barry Farber Show*, which airs 5 to 7 p.m. on 85 stations. Farber was formerly syndicated by Talk Radio Network. New Jersey-based telecommunications firm IDT purchased TARN last year.

Livin' Large Clears for Fall Launch

Heritage Networks, coproducer of *Livin' Large*, the new one-hour weekly series set to premiere in syndication this fall, reports that the show is cleared in more than 170 markets representing 96 percent U.S. broadcast coverage. The announcement was made by president Frank Mercado-Valdes of

Heritage, which is producing *Livin' Large* with Dick Clark Productions. Carmen Electra and Kadeem Hardison will host the magazine-format lifestyle series, distributed by Carsey-Werner Distribution.

Arbitron to Measure Local Web Visits

Arbitron announced plans to collaborate with Internet measurement company comScore Networks to develop an Internet-measurement service for local media using comScore's localScore service, which currently measures local audiences to local Web sites in 78 markets. If Arbitron finds there is a market for such services, the radio ratings company is likely to provide sales representation for the service to local media outlets.

TV People Meter Study Under Way

The Advertising Research Foundation and ESOMAR, the World Association of Opinion and Marketing Research Professionals, announced plans to conduct a study on television people meters. Called the Global TV Peplemeter Customer Satisfaction Review, the study is being conducted in 23 countries in North America, Europe, Latin America and the Asia Pacific region and will be carried out by British researcher Peter Menner. One hundred advertisers, agencies and broadcasters were asked to rate their satisfaction with several aspects of their national audience measurement system. The results of the study

INVOLVEMENT INDEX, \$75K-PLUS

TITLE	TRADITIONAL PLAN (RANKED BY PERCENT COVERAGE)		INVOLVED READER PLAN (RANKED BY INVOLVEMENT INDEX)	
	FREQ.	DOLLARS (000)	FREQ.	DOLLARS (000)
TIME	5x	\$1,104.0	6x	\$1,324.8
PEOPLE	6x	\$1,055.4	6x	\$1,055.4
NEWSWEEK	5x	\$957.4	0x	\$0
BETTER HOMES & GARDENS	3x	\$816.3	3x	\$813.2
READER'S DIGEST	3x	\$631.2	3x	\$631.2
NATIONAL GEOGRAPHIC	3x	\$528.2	3x	\$528.2
MARTHA STEWART LIVING	0x	\$0	3x	\$346.5
SOUTHERN LIVING	0x	\$0	3x	\$313.5
TOTAL	25x	\$5,092.5	27x	\$5,015.9
REACH/FREQUENCY/GRPS:		81/6/488		82/5.9/482
CPM:		\$19.37		\$19.24

Source: MRI Spring 2001 data/New Age Media Systems

been altered to reflect involvement index data. Since *Martha Stewart Living* and *Southern Living* index high in involvement against \$75,000-plus households, they get added into the "Involved Reader" buy (right column). And because *Time* and *Newsweek* rank nearly the same in involvement, one title was dropped in the recalculated plan (it happened to be *Newsweek* in this sample, but it could go either way, agency researchers said).

will be released June 11 at the Television Conference, which is part of a "Week of Audience Measurement Conference" that both organizations put together and will be held in Cannes, France.

Woods Gives *GD* an Exclusive

Tiger Woods, a contributor to *Golf Digest* magazine for the past five years, has expanded his partnership with the Advance Publications title. Woods has extended his multiyear contract as a "playing editor" to write exclusively for *Golf Digest* each month. *Golf Digest* will provide tigerwoods.com with tournament photographs and share with the site all past and future magazine content written by Woods. The magazine will also supply photographs and printed materials to Woods' junior golf clinics and will publish the Tiger Woods Foundation's annual report.

IAG Signs Initiative MindShare, OMD

Intermedia Advertising Group, the only syndicated service that monitors television ad performance, has signed three media agency giants—Initiative Media, Mindshare and OMD. IAG has collected ad data daily on every television program in prime time on the six major broadcast networks for multiple clients since 1999. The three media specialist companies have estimated combined billings of \$26.2 billion in the U.S. and \$59.5 billion worldwide. ■



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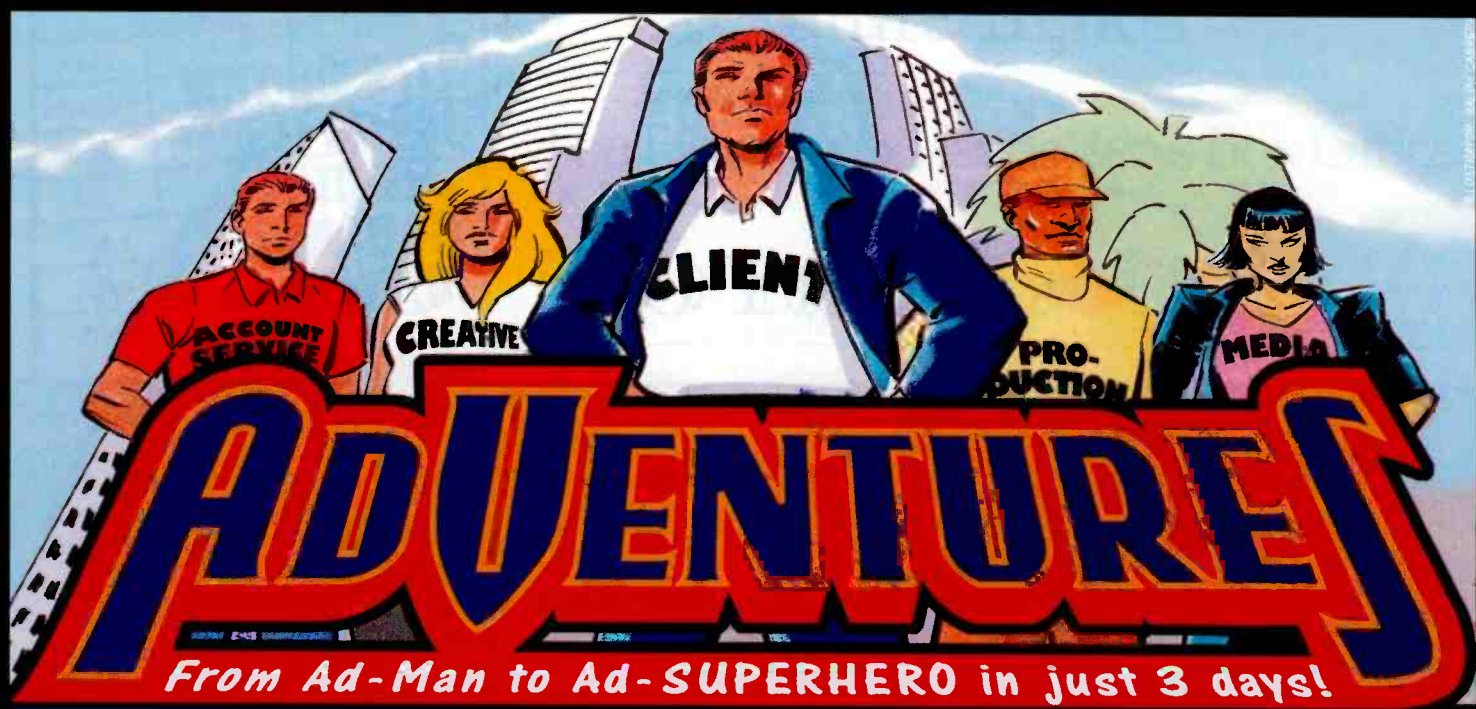
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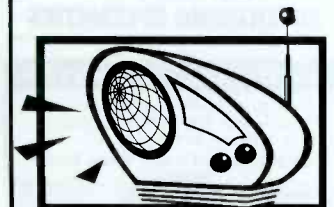
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USE ADWEEK MAGAZINES TO GET NATIONAL EXPOSURE

Culture Trends

MTV Top 20 U.S. Countdown

Week of 5/13/02

1. **Shakira** "Underneath Your Clothes"
2. **Tweet** "Oops"
3. **Kylie Minogue**
"Can't Get You Out of My Head"
4. **Michelle Branch** "All You Wanted"
5. **Ashanti** "Foolish"
6. **Vanessa Carlton** "A Thousand Miles"
7. **Enrique Iglesias** "Escape"
8. **Fat Joe Ashanti** "What's Luv?"
9. **Britney Spears** "Overprotected"
10. **Usher** "U Don't Have to Call"
11. **B2K** "Uh Huh"
12. **Faith Evans** "I Love You"
13. **Ludacris** "Saturday"
14. **P. Diddy w/Usher** "I Need a Girl"
15. **Nas** "One Mic"
16. **Unwritten Law** "Seein' Red"
17. **The X-Ecutioners** "It's Goin' Down"
18. **System of a Down** "Toxicity"
19. **Adema** "The Way You Like It"
20. **Nickelback** "Too Bad"

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The Billboard 200

The top-selling albums compiled from a national sample of retail store sales.

This Week	Last Week	Weeks on Chart	Title	Artist
1	1	3	Ashanti	Ashanti
2	-	1	C'mon, C'mon	Sheryl Crow
3	2	4	A New Day Has Come	Celine Dion
4	3	5	Now 9	Various
5	7	4	The Scorpion King	Soundtrack
6	5	3	Southern Hummingbird	Tweet
7	6	69	O Brother, Where Art Thou?	Soundtrack
8	12	19	Josh Groban	Josh Groban
9	9	22	Misunderstood	Pink
10	8	23	Laundry Service	Shakira

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The Billboard Hot 100

The most popular singles compiled from a national sample of radio play and retail sales.

This Week	Last Week	Weeks on Chart	Title	Artist
1	1	12	Foolish	Ashanti
2	2	12	What's Luv?	Fat Joe w/ Ashanti
3	4	13	U Don' Have to Call	Usher
4	6	8	I Need a Girl	P. Diddy w/ Usher
5	3	19	Ain't it Funny	Jennifer Lopez
6	7	20	Blurry	Puddle of Mudd
7	8	13	Ooops	Tweet
8	5	13	Girlfriend	'N Sync w/ Nelly
9	11	9	Don't Let Me Get Me	Pink
10	10	10	A Thousand Miles	Vanessa Carlton

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Brave New World

As their territory trembles and shifts, tech titles struggle to remain relevant **BY DAVID HANDELMAN**

IN OCTOBER 2000, RED HERRING WAS SO SWOLLEN WITH ADS THAT IT HAD TO DOUBLE its frequency from monthly to biweekly. Then in rapid succession came the dot-bomb, the recession and Sept. 11, and last November RH was forced to shrink back to a monthly. The technology book's June issue

weighs in at just 104 ad pages, and *Red Herring* is down 56 percent in pages for the first six months of 2002 compared to the first half of last year, reports the *Mediaweek* Monitor.

But unlike such once-hot tech casualties as *The Industry Standard*, *Silicon Alley* and IDG's *Darwin*, at least *Red Herring* is still around. Along with Condé Nast's *Wired* and Time Inc.'s *Business 2.0*, it is among the last titles standing in the shrinking category.

All three survivors are undergoing upheaval, with new editors challenged to find fresh voices. As recently installed *Business 2.0* editor Joshua Quittner puts it: "How can a magazine cover something that has been ostensibly diminished from what it once was?"

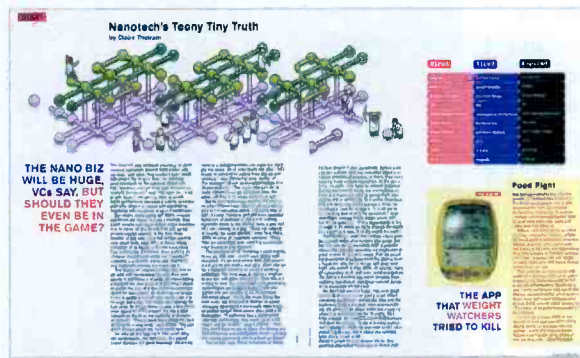
While the genre's total circulation numbers are respectable enough, the newsstand picture is disastrous. In the second half of last year, *Red*

Business 2.0's current 550,000 circ is harder to contrast because the title was created just last year via the combination of Future Network's *Business 2.0* and Time Inc.'s *eCompany Now*.

The ad page tally is just as grim. In addition to RH's 56 percent swoon through June, *Wired*'s pages dropped 49.4 percent to 340, and *Business 2.0*'s 296 pages also were off sharply (in the first half of '01, then-biweekly 2.0 ran 684 ad pages and monthly *eCompany* published 417).

Yet the editors of all three books remain doggedly upbeat. *Wired*'s Chris Anderson, who joined the monthly last year from *The Economist*, insists that the technological revolution the magazine championed is not over. "We've only begun to see the impact of the many technologies that have been coming together for the past decade," he says. "Ad cycles come and go," adds Anderson, "but if we lose our edge or deliver something that doesn't work, that would have [worse] long-term effects."

In fact, *Wired* may have lost some of that edge as it has attempted to maintain its street cred while building a mainstream readership. With *Wired*'s early utopianism now outmoded and Anderson simultaneously under siege from digitheads for not being enough of a purist, the newbie editor has had to figure out a new way to lead. "*Wired* was prescient with its view of the world," says Anderson. "I aim to evolve it and extend it. We've



Wired's June issue features a face-lift and new departments.

Herring's total paid circ grew 5.8 percent to 333,810, according to the Audit Bureau of Circulations, but newsstand sales plummeted 63.2 percent. *Wired*'s paid circ climbed 1.5 percent to 515,383, but single copies slid 31.6 percent.



Emil Wilbekin Editor in Chief, *Vibe*

Q. What does winning a National Magazine Award for General Excellence mean for *Vibe*? **A.** It means that the magazine industry takes *Vibe* seriously, it takes the urban music and urban culture we cover seriously, and it takes our readers seriously. **Q.** Susan Taylor of *'Essence,'* who was inducted into the American Society of Magazine Editors' Hall of Fame, spoke at the awards ceremony about the 'sea of white faces' in the audience. What were you thinking when she said that? **A.** Thank God Susan Taylor exists. She was saying things that are true and that needed to be said. And it was coming from someone no one would question. **Q.** One of the biggest R&B/hip-hop singers, TLC's Lisa Lopes, died last month. What does *'Vibe'*

have in the works to honor her? **A.** We're doing two covers for the July issue. There will be a newsstand cover of Lisa, with a six-page tribute inside. Subscribers will also get the tribute, but their copies will have (singer) Ashanti on the cover. One of my editors, Mimi Valdéz, had gone to Honduras with Lisa last year and had covered TLC, so she wrote the tribute and interviewed people who have worked with TLC. We've done tribute issues before, like Aliyah last summer. Our subscribers were happy, and we got new people at newsstand. **Q.** Obviously, you listen to the music your readers enjoy. But what's your guilty pleasure? **A.** I like Wham! [laughs]...and Duran Duran—a lot of '80s glam rock. That would be my guilty pleasure. **Q.** What would your readers think if they knew? **A.** I don't know about the Day-Glo outfits, but I think they'd be O.K. with Wham!

entered a new phase of the revolution. We can now celebrate technology in the mainstream.”

To help solidify that position, Anderson has introduced a redesign in *Wired's* June issue with help from creative director Darrin Perry, former design director of *ESPN The Magazine*. The monthly's front-of-book pages now have a white border to better distinguish editorial from ads and have been rearranged into clearer categories, including Start, for news and analysis, as well as Play, which features a selection of films, books and games. The redesign also mixes in a healthy dose of *Wired's* trippy fluorescent colors in an effort to give it a “bright, consistent look” Anderson says.

Meanwhile, beginning with the May issue of *Red Herring*, founding editor Jason Pontin kicked himself upstairs to become editorial director and promoted deputy editor Blaise Zerega to editor. Along with writing a “meditative” column for the magazine, Pontin will now work “to make *Red Herring* appealing to a broader community of readers,” he wrote in his May editor's letter.

Another shuffle occurred last month at *Business 2.0*. Ned Desmond, founding editor of *eCompany Now*, shifted his attention fully to *2.0's* business side and brought in Quittner, who had run Time Inc.'s failed digital monthly, *On*, and had briefly overseen Time.com.

Quittner plans to bring more tech success stories to *Business 2.0*. “I'm interested in the new heroes of what we're defining as this industry—the idea of ‘future tilt,’ and doing business a new way,” he says. “The hardest thing right now... is finding stuff that works. That's what readers are looking for in troubled economic times.” As are publishers and editors of technology magazines.

Blame the Name

Ziff shuts Smart Business

Another demise in the tech category came last week at Ziff Davis Media, which pulled the plug on the long-suffering *Ziff Davis' Smart Business*, the business-technology magazine formerly known as *Smart Business for the New Economy* and, before that, *PC Computing*. The June issue will be *Smart*



Anderson: Tech is in a new phase.

MONTHLIES June 2002

	RATE BASE (1ST HALF '01)	CIRC. (1ST HALF '01)	CURRENT PAGES	PAGES LAST YR.	% CHANGE	YEAR TO DATE	YTD LAST YEAR	% CHANGE
BUSINESS/TECHNOLOGY								
Business 2.0 ^L	550,000 ^D	530,909	68.82	N.A.	N.A.	295.50	N.A.	N.A.
Entrepreneur	540,000	563,534	100.02	114.86	-12.92%	648.12	689.01	-5.93%
Fast Company	680,000	708,251	75.54	89.33	-15.44%	353.62	512.01	-30.93%
Fortune Small Business ¹⁰	1,000,000	N.A.	34.33	39.55	-13.20%	187.18	214.79	-12.85%
Inc ²	650,000	665,428 ^B	70.07	103.34	-32.19%	365.81	478.51	-23.55%
Red Herring ^{M/U}	325,000	333,810	44.00	140.00	-68.57%	243.00	552.00	-55.98%
Technology Review ¹⁰	275,000	287,221	33.24	33.31	-0.21%	127.06	193.18	-34.23%
Upside ^{10/D}	300,000	307,175 ^B	14.00	44.00	-68.18%	73.00	300.00	-75.67%
Wired	500,000	515,383	72.90	101.33	-28.06%	340.28	672.72	-49.42%
Category Total			512.92	665.72	-22.95%	2,633.57	3,612.22	-27.09%
ENTERTAINMENT								
Movieline ^{11/1/F}	300,000	307,786	29.83	36.50	-18.27%	124.15	172.72	-28.12%
Premiere	600,000	617,389	41.69	34.32	21.47%	177.65	208.68	-14.87%
The Source	460,000	464,644	78.15	117.49	-33.48%	511.13	684.55	-25.33%
Spin	525,000	541,506	56.28	88.44	-36.36%	359.99	453.60	-20.64%
Vibe ¹⁰	775,000	800,114	88.39	101.14	-12.61%	508.81	531.35	-4.24%
Yahoo! Internet Life	1,100,100	1,103,076	32.20	54.59	-41.01%	151.48	320.90	-52.80%
Category Total			326.54	432.48	-24.50%	1,833.21	2,371.80	-22.71%
ENTHUSIAST								
Automobile	625,000	634,006	79.64	70.89	12.34%	366.08	362.33	1.03%
Backpacker ⁹	285,000	291,089	42.00	61.87	-32.12%	252.44	339.42	-25.63%
Bicycling ¹¹	285,000	280,218	46.73	63.16	-26.02%	184.58	240.05	-23.11%
Boating	None	201,171	115.32	122.41	-5.79%	725.69	845.84	-14.20%
Car and Driver	1,350,000	1,371,761	93.43	96.71	-3.39%	487.55	520.71	-6.37%
Cruising World	155,000	159,536	84.32	107.66	-21.68%	587.10	682.52	-13.98%
Cycle World	310,000	328,351	100.76	118.63	-15.06%	541.12	598.16	-9.54%
Flying	None	305,050	74.82	66.49	12.53%	364.55	401.24	-9.14%
Golf Digest	1,550,000	1,567,588	142.64	128.55	10.96%	722.08	685.82	5.29%
Golf Magazine	1,400,000	1,400,328	133.16	121.04	10.01%	709.93	723.34	-1.85%
Motor Boating	None	125,473	112.55	95.04	18.42%	653.73	799.22	-18.20%
Motor Trend	1,250,000	1,271,620	83.51	82.38	1.37%	407.50	404.90	0.64%
Popular Mechanics	1,200,000	1,211,630	78.89	54.04	45.98%	390.94	351.11	11.34%
Popular Photography	450,000	452,297	150.25	168.55	-10.86%	874.29	1,031.36	-15.23%
Popular Science ¹⁰	1,550,000	1,567,079	53.07	28.01	89.47%	263.61	206.04	27.94%
Power & Motoryacht	None	156,735 ^B	202.46	181.33	11.65%	1,322.55	1,312.45	-0.80%
Road & Track	750,000	787,579	106.16	106.55	-0.37%	532.09	542.46	-1.91%
Sailing World ¹⁰	55,000	56,752	59.53	44.25	34.55%	222.34	218.00	1.99%
Stereo Review's Sound & Vision ¹⁰	450,000	453,901	56.65	68.15	-16.87%	299.23	375.11	-20.23%
Tennis ¹⁰	700,000	709,979	53.57	54.77	-2.19%	238.91	303.65	-21.32%
Yachting	132,000	132,846	170.70	157.08	8.67%	1,026.97	1,078.78	-4.80%
Category Total			2040.15	1997.56	2.13%	11,083.28	12,022.50	-7.81%
FASHION/BEAUTY								
Allure	850,000	945,631	117.27	92.07	27.37%	543.20	552.79	-1.73%
Cosmopolitan	2,600,000	2,759,448	177.44	162.10	9.46%	862.14	968.48	-10.98%
Elle	950,000	981,117	81.42	131.16	-37.92%	672.79	936.74	-28.18%
Essence	1,050,000	1,053,484	91.42	106.43	-14.10%	497.63	628.03	-20.76%
Glamour	2,100,000	2,201,279	140.74	129.51	8.67%	663.02	751.99	-11.83%
Harper's Bazaar	700,000	736,494	54.64	85.85	-36.35%	613.14	817.64	-25.01%
Honey ¹⁰	250,000	260,668	66.75	62.16	7.38%	263.09	225.41	16.72%
In Style ^{S/W}	1,400,000	1,568,777	207.00	187.94	10.14%	1,254.68	1,326.79	-5.42%
Jane ¹⁰	600,000	619,166	78.82	81.45	-3.23%	380.39	401.25	-5.20%
Lucky	600,000	693,176	77.71	43.45	78.85%	388.62	244.69	58.82%
Marie Claire	825,000	925,919	146.44	102.37	43.05%	710.11	732.10	-3.00%
Vogue	1,100,000	1,192,949	146.14	134.23	8.87%	1,203.85	1,362.20	-11.62%
W	425,000	455,372	81.00	103.00	-21.36%	751.03	940.31	-20.13%
Category Total			1466.79	1421.72	3.17%	8,803.69	9,888.42	-10.97%
FOOD/EPICUREAN								
Bon Appétit	1,200,000	1,267,560	99.68	86.69	14.98%	492.76	583.94	-15.61%
Cooking Light ¹¹	1,450,000	1,562,339	134.25	114.90	16.84%	570.43	547.95	4.10%
Food & Wine	800,000	978,277	111.73	118.22	-5.49%	513.08	529.35	-3.07%
Gourmet	900,000	947,399	93.00	74.05	25.59%	534.43	603.88	-11.50%
Category Total			438.66	393.86	11.37%	2,110.70	2,265.12	-6.82%
GENERAL INTEREST								
Atlantic Monthly ¹¹	450,000	504,336	37.32	31.01	20.35%	222.55	203.01	9.63%
Biography	650,000	733,495	28.83	40.00	-27.93%	156.46	222.02	-29.53%
Harper's Magazine	205,000	212,010	19.83	20.49	-3.22%	101.56	126.58	-19.77%
National Geographic	7,700,000	7,664,658	43.51	37.27	16.74%	182.07	186.98	-2.63%
People en Español ^{11/4}	325,000	356,152	87.92	86.40	1.76%	282.12	307.75	-8.33%
Reader's Digest	12,500,000	12,565,779	76.20	111.31	-31.54%	493.23	560.26	-11.96%
Savoy	200,000	201,048	49.41	38.00	30.03%	229.03	166.58	37.49%
Smithsonian	2,000,000	2,040,141	54.84	53.50	2.50%	290.08	347.51	-16.53%
Vanity Fair	1,000,000	1,108,536	126.29	119.16	5.98%	779.24	847.60	-8.07%
Category Total			524.15	537.14	-2.42%	2,736.34	2,968.29	-7.81%
HEALTH/FITNESS (MEN)								
Flex	150,000	142,253	194.83	173.85	12.07%	1,118.81	1,005.28	11.29%
Muscle & Fitness	None	440,298	159.62	163.50	-2.37%	859.77	867.82	-0.93%
Runner's World	505,000	520,684	42.66	38.02	12.20%	212.29	189.90	11.79%
Category Total			397.11	375.37	5.79%	2,190.87	2,063.00	6.20%
HEALTH/FITNESS (WOMEN)								
Fitness	1,050,000	1,168,622	100.32	62.58	60.31%	436.66	314.21	38.97%
Health ^{10/1}	1,300,000	1,411,174	112.81	81.40	38.59%	485.89	447.36	8.61%
Prevention	3,100,000	3,121,340	93.26	105.19	-11.34%	514.39	522.45	-1.54%
Self	1,200,000	1,332,689	114.00	97.45	16.98%	538.32	554.45	-2.91%
Shape	1,500,000	1,580,655	95.92	72.83	31.70%	442.17	438.04	0.94%
Category Total			516.31	419.45	23.09%	2,417.43	2,276.51	6.19%
KIDS								
Boys' Life	1,300,000	1,224,829	7.44	12.36	-39.81%	52.73	70.60	-25.31%
Disney Adventures ¹⁰	1,100,000	1,120,344 ^B	24.68	18.00	37.11%	114.69	114.00	0.61%
Nickelodeon Magazine ^{10/D}	900,000	929,873 ^B	40.16	28.67	40.08%	163.27	144.55	12.95%
Sports Illustrated for Kids	950,000	977,695 ^B	31.94	30.61	4.34%	144.91	145.94	-0.71%
Category Total			104.22	89.64	16.27%	475.60	475.09	0.11%
MEN'S LIFESTYLE								
Details ¹⁰	400,000	407,778	67.05	60.09	11.58%	342.86	347.38	-1.30%
Esquire	650,000	659,386	53.52	69.01	-22.45%	361.47	445.94	-18.94%

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FHM^{11/+}	750,000	844,127	60.00	38.64	55.28%	350.30	214.78	63.10%
Gear^{11/+}	500,000	517,008	42.33	30.66	38.06%	203.98	162.32	25.67%
Gentlemen's Quarterly	750,000	758,969	141.04	117.75	19.78%	677.14	753.53	-10.14%
Maxim	2,500,000	2,553,895	107.34	97.31	10.31%	534.68	535.21	-0.10%
Men's Fitness	550,000	589,407	73.80	78.75	-6.29%	394.77	370.47	6.56%
Men's Health¹⁰	1,625,000	1,630,846	72.08	82.38	-12.50%	358.09	362.16	-1.12%
Men's Journal	600,000	638,462	86.24	68.97	25.04%	395.01	454.78	-13.14%
Penthouse	None	641,115	35.31	42.34	-16.60%	231.81	262.16	-11.58%
Playboy	3,150,000	3,157,540	53.50	65.61	-18.46%	254.71	302.56	-15.82%
Stuff	1,000,000	1,103,745	63.14	43.49	45.18%	349.00	278.86	25.15%
Category Total			855.35	795.00	7.59%	4,453.82	4,490.15	-0.81%
OUTDOORS								
Field & Stream	1,750,000	1,752,621	38.82	31.85	21.88%	242.32	229.31	5.67%
National Geographic Adventure^{10//H}	350,000	351,238	43.51	37.27	16.74%	182.07	186.98	-2.63%
Outdoor Life^{10/1}	1,350,000	1,357,705	51.76	34.42	50.38%	166.46	166.26	0.12%
Outside⁺⁺	600,000	643,454	68.27	63.24	7.95%	408.48	447.67	-8.75%
Category Total			202.36	166.78	21.33%	999.33	1,030.22	-3.00%
PARENTING/FAMILY								
American Baby	2,000,000	2,001,922 ^B	58.36	40.65	43.57%	331.17	277.33	19.41%
Baby Talk¹⁰	2,000,000	2,001,384 ^B	52.34	40.61	28.88%	224.94	201.80	11.47%
Child¹⁰	1,020,000	939,310	91.47	65.88	38.84%	357.49	304.64	17.35%
FamilyFun¹⁰	1,450,000	1,389,699	72.14	64.85	11.24%	333.43	298.05	11.87%
Parenting¹⁰	2,150,000	1,914,419	129.71	102.09	27.05%	501.87	477.33	5.14%
Parents	2,125,000	2,005,578	116.13	100.20	15.90%	647.90	628.24	3.13%
Category Total			520.15	414.28	25.56%	2,396.80	2,187.39	9.57%
PERSONAL FINANCE								
Bloomberg Personal Finance¹⁰	300,000	354,990	23.67	31.80	-25.57%	122.18	188.40	-35.15%
Kiplinger's Personal Finance¹⁰	1,000,000	1,223,486	54.17	55.31	-2.06%	290.03	371.40	-21.91%
Money	1,900,000	2,195,178	82.09	87.08	-5.73%	381.83	521.84	-26.83%
Mutual Funds	800,000	884,136	31.51	41.87	-24.74%	209.09	304.44	-31.32%
SmartMoney	800,000	809,685	56.12	65.28	-14.03%	330.77	451.82	-26.79%
Worth¹⁰	500,000	507,691	42.06	78.00	-46.08%	245.67	291.59	-15.75%
Category Total			289.62	359.34	-19.40%	1,579.57	2,129.49	-25.82%
SCIENCE/TECHNOLOGY								
Discover	1,000,000	1,025,059	20.66	24.99	-17.33%	130.13	164.14	-20.72%
Natural History¹⁰	225,000 ^D	264,815	26.18	29.00	-9.72%	172.72	168.18	2.70%
Scientific American	655,000	687,437	23.67	25.68	-7.83%	136.46	134.17	1.71%
Spectrum, IEEE	None	325,685	29.00	41.64	-30.36%	216.79	325.97	-33.49%
Category Total			99.51	121.31	-17.97%	656.10	792.46	-17.21%
SHELTER								
Architectural Digest	800,000	822,014	153.23	156.73	-2.23%	803.50	886.88	-9.40%
Country Living	1,600,000	1,639,626	79.68	96.23	-17.20%	487.45	493.26	-1.18%
The Family Handyman¹⁰	1,100,000	1,137,203	63.34	56.58	11.95%	299.84	287.75	4.20%
Home¹⁰	1,000,000	1,006,306	70.76	94.99	-25.51%	321.69	421.15	-23.62%
House Beautiful	850,000	865,352	104.57	103.56	0.98%	492.00	468.99	4.91%
House & Garden	750,000	768,985	92.16	82.47	11.75%	445.94	496.80	-10.24%
Southern Living¹³	2,500,000	2,549,601	129.72	114.50	13.29%	709.91	741.86	-4.31%
Sunset	1,425,000	1,459,354	94.49	97.90	-3.48%	522.23	589.81	-11.46%
This Old House^{10/K}	925,000 ^D	1,075,058	100.39	96.65	3.87%	412.92	429.45	-3.85%
Category Total			888.34	899.61	-1.25%	4,495.48	4,815.95	-6.65%
TEEN								
CosmoGirl!^{10/D}	750,000	838,964	65.38	65.00	0.58%	265.31	259.07	2.41%
Seventeen	2,350,000	2,333,126	113.54	96.64	17.49%	582.42	616.07	-5.46%
Teen People^{10//D}	1,600,000	1,639,107	95.22	86.86	9.62%	426.65	487.32	-12.45%
YM^{11/+}	2,200,000	2,206,078	78.74	61.14	28.79%	408.01	350.31	16.47%
Category Total			352.88	309.64	13.96%	1,682.39	1,712.77	-1.77%
TRAVEL								
Condé Nast Traveler	750,000	772,476	101.09	82.63	22.34%	599.34	744.55	-19.50%
Travel + Leisure	925,000	1,012,305	133.51	150.64	-11.37%	629.26	842.35	-25.30%
Travel Holiday¹⁰	650,000	659,505	50.62	85.32	-40.67%	478.09	481.32	-0.67%
Category Total			285.22	318.59	-10.47%	1,706.69	2,068.22	-17.48%
WEALTH								
Robb Report	None	100,526	136.65	158.00	-13.51%	496.81	805.00	-38.28%
Town & Country	425,000	433,771	136.95	141.28	-3.06%	644.09	742.60	-13.27%
Category Total			273.60	299.28	-8.58%	1,140.90	1,547.60	-26.28%
WOMEN'S LIFESTYLE								
Heart & Soul¹⁰	300,000	316,122	51.08	38.33	33.26%	200.07	150.74	32.73%
Martha Stewart Living	2,150,000	2,437,970	154.71	143.01	8.18%	867.45	874.79	-0.84%
More¹⁰	650,000 ^D	632,520	47.96	52.53	-8.70%	260.76	325.05	-19.78%
Q, The Oprah Magazine	1,900,000	2,751,563	117.07	106.45	9.98%	640.52	635.22	0.83%
Real Simple¹⁰	700,000	864,891	97.00	46.00	110.87%	345.70	231.50	49.33%
Rosie^{RY}	3,500,000	3,613,055	91.24	62.72	45.47%	474.84	208.17	128.10%
Victoria	950,000	976,795	31.59	23.17	36.34%	190.09	180.42	5.36%
Category Total			590.65	472.21	25.08%	2,979.43	2,605.89	14.33%
WOMEN'S SERVICE								
Better Homes and Gardens	7,600,000	7,601,377	210.15	161.69	29.97%	941.91	880.54	6.97%
Family Circle^{15/1}	4,600,000 ^D	4,712,548	110.54	95.68	15.53%	636.19	623.08	2.10%
Good Housekeeping	4,500,000	4,527,447	130.82	120.52	8.55%	719.64	747.10	-3.68%
Ladies' Home Journal	4,100,000	4,100,675	105.42	102.75	2.60%	583.93	604.76	-3.44%
Redbook	2,250,000	2,321,233	107.74	113.94	-5.44%	538.87	635.71	-15.23%
Woman's Day¹⁷	4,350,000 ^D	4,257,742	137.35	135.61	1.28%	728.40	810.62	-10.14%
Category Total			802.02	730.15	9.84%	4,148.94	4,301.81	-3.55%
MEDIAWEEK MONITOR TOTALS			11486.55	11219.16	2.38%	60,524.14	65,624.90	-7.77%

Rate base and circulation figures according to the Audit Bureau of Circulations for the first half of 2001, except: B=audited by BPA International, C=non-audited title; D=double issue; F=combined Feb./March issue in 2002; H=May/June 2001 combined issue; J=Dec 01/Jan 02 issue not counted in 2002 YTD; K= includes spring SIP Outdoor Projects; L=relaunched in 9/01; M=moved from biweekly to monthly in 11/01; N=includes 1/01 year-end newstand-only issue; Q=raised rate base during period; R=launched in 5/01; S=will publish four specials in 2002; U=two issues in June 2001; W=YTD 2002 includes two special issues; Y=YTD 2001 includes only May/June ad pages; +=will publish one fewer issue in 2002 than 2001; -=will publish two fewer issues in 2002; 9=published 9 times per year; 10=published 10 times; 11=published 11 times; 13=published 13 times; 15=published 15 times; 17=published 17 times; +=will publish one more issue in 2002 than 2001; ++=will publish two more issues in 2002 than 2001; #=will publish four more issues in 2002

Business' last.

The 800,000-circulation monthly had been bleeding red ink, with ad pages down 59.4 percent this year through April to 116, according to the Publishers Information Bureau. In addition to the sharp overall decline in tech spending, *Smart Business* also suffered from an identity crisis. Neither readers nor advertisers ever fully embraced the repositioning in May 2000 of *PC Computing* to a tech-style *Fortune*.



Ziff "wanted to get away from the word 'PC' because that wasn't cool, and then it tried *Smart Business for the New Economy*, but 'New Economy' was taboo," notes Carol McDonald, print media manager of OMD/USA. "This magazine had too many rebirths."

"*Smart Business* bridged the tech marketplace and the financial marketplace. It's a great concept, but it missed the mark, and it lost money," says Robert Callahan, Ziff Davis chairman/CEO. "You can't have that when you're playing in the two worst categories in business."

Some 30 *SB* staffers will lose their jobs. Editor Wendy Taylor will stay on to run the magazine's Web site and relaunch the title as a newsletter in September.

Ziff, among the publishers hardest hit by the technology slowdown, saw its first-quarter earnings fall 53 percent to \$5.1 million. "The market [remains] tough across-the-board," says Callahan about Ziff's second quarter. —LG

Accuracy Counts

Parade funds audience study

Amid growing concerns about how Sunday magazine readership is measured, Advance Publications' *Parade* is funding new research that the title hopes will lead to higher advertiser confidence in its readership data.

At issue is the soundness of Mediarmk Research Inc.'s longtime method of measuring Sunday magazines' audiences using the carrier paper's readership figures. Critics, among them magazine publishers and advertising agencies, believe the MRI data overstate Sunday magazines' readership by assuming that all readers of a newspaper are also reading its magazine.

"When we are doing comparisons of mag-

azine readership, and we want to include Sunday supplements in that analysis, it's really not an apples-to-apples comparison," says Judy Vogel, director of communication insights for ad agency giant OMD.

While the controversy has been around for years, tighter ad budgets and another recent readership study have added fuel to the fire. Confirming their view that Sunday magazine readers are overcounted, magazine publishers have pointed to a May 2001 Multimedia Audience Research Systems study that used different methodology than MRI and resulted in lower numbers for the Sunday mags.

Eager to resolve uncertainties about its audience numbers, *Parade* has commissioned a study by media consultancy firm McPheters & Co., with help from executives of Gannett Co.'s rival *USA Weekend* and support from the Media Ratings Council, a non-profit group that audits media research. The first phase of the study will be completed this fall; if the project goes forward, a second phase could result in changes to how MRI measures Sunday magazines.

McPheters' research will try to determine how consumers perceive the Sunday publications—as magazines or newspaper supplements. Confusion about the definition of Sunday magazines is a major factor in the "widely divergent estimates of audience of these publications," says Rebecca McPheters, president of McPheters & Co.

In the newspaper business, the re-evaluation of readership measurement may not end with Sunday mags. Discussion has extended to the lack of measurement of individual newspaper sections. —Lucia Moses, *Editor & Publisher* ■

Mediaweek Magazine Monitor

WEEKLIES May 20, 2002

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek ^X	13-May	65.40	14-May	116.18	-43.71%	1,065.00	1,512.02	-29.56%
The Economist	11-May	44.00	12-May	60.00	-26.67%	928.00	1,146.00	-19.02%
Newsweek ^{E/X}	20-May	28.00	21-May	23.82	17.55%	654.32	630.89	3.71%
The New Republic ²	20-May	12.79	21-May	10.50	21.81%	158.89	166.78	-4.73%
Time ^{E/X}	20-May	61.98	21-May	67.32	-7.93%	838.01	839.75	-0.21%
US News & World Report	20-May	19.10	21-May	34.26	-44.25%	485.97	530.17	-8.34%
The Weekly Standard	27-May	11.00	28-May	10.40	5.77%	192.63	192.60	0.02%
Category Total		242.27		322.48	-24.87%	4,322.82	5,018.21	-13.86%
SPORTS/ENTERTAINMENT/LEISURE								
AutoWeek	20-May	30.07	21-May	24.16	24.46%	455.04	576.69	-21.09%
Entertainment Weekly	17-May	32.65	18-May	31.22	4.58%	627.36	642.90	-2.42%
Golf World	17-May	25.50	18-May	31.00	-17.74%	619.51	507.59	22.05%
New York ³	20-May	26.50	21-May	50.20	-47.21%	1,002.70	1,080.40	-7.19%
People ^X	20-May	78.22	21-May	97.40	-19.69%	1,347.05	1,433.44	-6.03%
The Sporting News	20-May	12.00	21-May	10.00	20.00%	281.80	255.08	10.48%
Sports Illustrated	20-May	34.11	21-May	33.21	2.71%	932.19	882.72	5.60%
The New Yorker	20-May	35.92	21-May	40.90	-12.18%	766.05	870.80	-12.03%
Time Out New York	15-May	70.31	16-May	72.56	-3.10%	1,276.69	1,305.75	-2.23%
TV Guide	18-May	50.67	19-May	73.38	-30.95%	1,013.66	1,221.35	-17.00%
US Weekly ¹	20-May	22.00	21-May	16.33	34.72%	375.00	350.32	7.04%
Category Total		417.95		480.36	-12.99%	8,697.05	9,127.04	-4.71%
SUNDAY MAGAZINES								
Parade	19-May	14.14	20-May	14.21	-0.49%	260.75	255.11	2.21%
USA Weekend	19-May	17.42	20-May	15.54	12.10%	253.56	230.23	10.13%
Category Total		31.56		29.75	6.08%	514.31	485.34	5.97%
TOTALS		691.78		832.59	-16.91%	13,534.18	14,630.59	-7.49%

E=estimated page counts; X=YTD 2001 includes an out-of-cycle issue; 1=one fewer issue in 2002 than 2001; 2=two fewer issues in 2002; 3=three fewer issues in 2002

BIWEEKLIES May 20, 2002

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
BUSINESS/ENTERTAINMENT								
ESPN The Magazine	27-May	56.31	28-May	46.91	20.04%	518.43	494.70	4.80%
Forbes ^{E/F/2}	13-May	162.40 ^F	14-May	168.04	-3.36%	955.92	1,580.41	-39.51%
Fortune	27-May	109.79	28-May	137.26	-20.01%	1,298.63	1,716.99	-24.37%
National Review	3-Jun	11.83	28-May	28.75	-58.84%	141.22	196.97	-28.30%
Rolling Stone	6-Jun	53.50	7-Jun	75.51	-29.15%	574.88	584.74	-1.69%
Category Total		393.83		456.47	-13.72%	3,489.08	4,573.81	-23.72%

E=publisher's estimates; F=includes FYI issue 5/20/2002; 2=two fewer issues to date in 2002 over 2001

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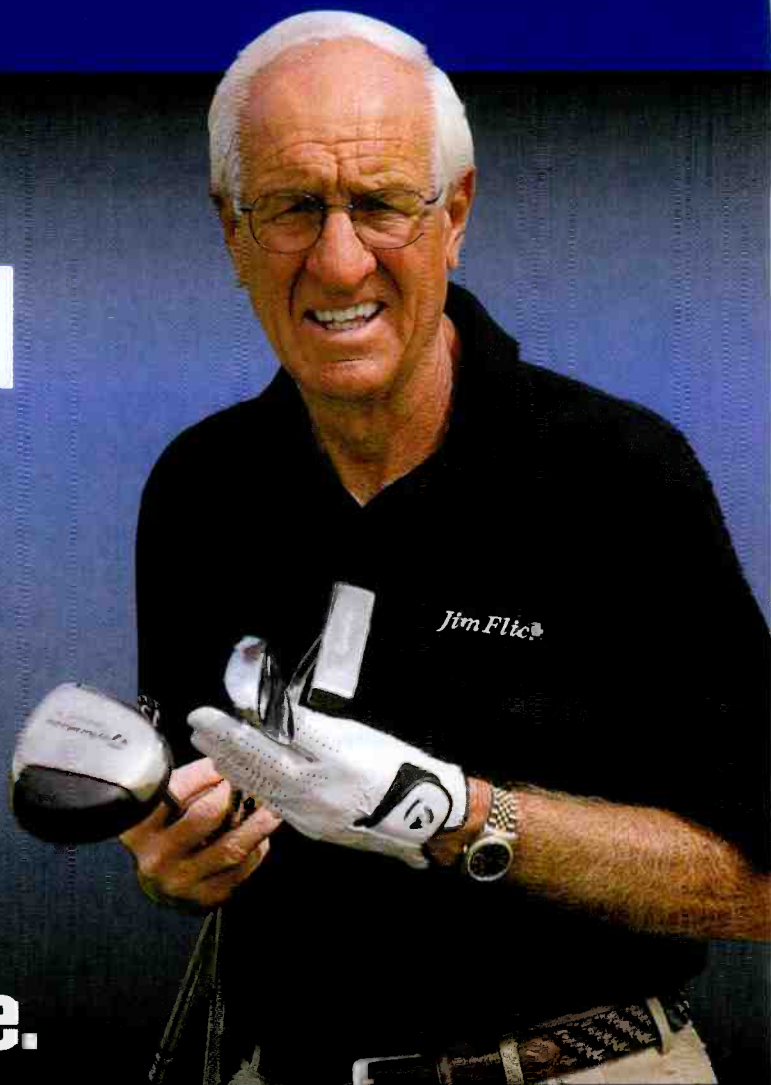
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Media Person

BY LEWIS GROSSBERGER



That Old Blocked Magic

A RECENT AP STORY OUT OF LONDON SHOCKED AND SADDENED

the world—and even Media Person—when it revealed that the new *Harry Potter* won't be hitting bookstores this summer as expected. The world counts on plucky Harry and his magical eyeglasses to take its mind

off its interminable woes for at least a week or two. Or, in the case of readers in Florida, a month or two.

Spider-Man and *Star Wars* are just not going to be enough, no matter what *Time* magazine says.

The sadness turned to panic around the third paragraph of the AP story, when a spokeswoman for J.K. Rowling named Rebecca Salt was quoted as having “rejected any suggestion Rowling was suffering from writer's block.”

Immediately, everyone knew Rowling is suffering from writer's block.

Well, it's perfectly understandable to Media Person. Jaykay, as her close friends may or may not call her, has already written four best sellers about the short, orphaned wand-wiggler in the musty robe. By now she must be sick of the whole thing and desperately yearning for a change of pace. Maybe a nice little article on snorkeling in the Gowanus Canal for the *Sophisticated Traveler* section of *The New York Times*. Or a switch to selling real estate.

People do get tired of writing the same thing, you know. But Jaykay's locked in. She's contracted for three more Harrys, and each one has to not only be a blockbuster but also spin off a blockbuster movie, as well as pump up the toy industry. This kind of pressure could give even the resilient Lord Voldemort a migraine.

Fortunately, Jaykay's peers have reacted with an unprecedented outpouring of sympathy and advice. Suggestions by the millions have flooded the London offices of Bloomsbury publishers, as the publishing/film/media community closes ranks in support of the beloved Rowling during her time of crisis. Due to his incomparable prestige and impor-

ance, Media Person has been allowed exclusive access to this remarkable correspondence so that he might share with you some of the more interesting counsel from well-known fans.

Tom Brokaw: A shift in focus would probably reinvigorate you. Why not write about Harry learning of the experiences of his parents' generation in the great war against the fascist wizards? Maybe he goes to interview the headmaster for the Hogwarts school paper and learns he was a parawizard, who dropped behind enemy lines and turned a whole platoon of evil sorcerers into warthogs. And so then Harry goes on interviewing until he has hundreds of inspiring war stories! And he realizes how useless his own spineless generation is compared to these hero wizards, and he is humbled and awed.

Tom Clancy: I know exactly how you feel. I had trouble getting Jack Ryan back to work

tioned. Why? Is it respect, or is it fear? I say take us behind the magic curtain and dig into the back-room deals, the rumors of corruption, the sleazy maneuvering and arm-twisting that got Dumbledore to the top. And don't be afraid to dig deep. Even if it takes you 10 or 20 years, do it!

Stephen W. Hawking: Your inability to function is easy to understand. It is a matter of common experience that things get more disordered and chaotic with time. This tendency, known as entropy, affects individuals as well as the universe. A living being such as yourself consists of two elements: a set of instructions that tell the system how to sustain and reproduce itself, and a mechanism to carry out the instructions... Say, are you following this? Wake up, damn it!

Steve Dunleavy: Look, sweetheart, here's what you do. Take a night off, hit the pub, have a few drinks, go home with a hunk. Then you're relaxed and ready to write. Now here's your plot: Voldemort comes back again because some bleeding-heart judge went soft on the bastard. Harry shoots him down like the pig deserves, but he's expelled by politically correct school bureaucrats because his

Fortunately, Jaykay's peers have reacted with an unprecedented outpouring of sympathy and advice.

the last time around. I thought, “Jeez, what, again?” But then I went over to the Pentagon, and they showed me some of the great new weapons being tested. (Actually got to drive the top-secret X-19 Nixon Fighting Vehicle and fire its laser cannon!) And I couldn't wait to get home and use that in the book. So...three little words, babe: Upgrade your technology!

Robert A. Caro: What fascinates me is Dumbledore, the headmaster. Here is a venerable man who wields immense power in the wizard establishment, power that is unques-

gun was unregistered. So he becomes Harry Potter, Vengeance Wizard, fighting for justice in a world gone rotten. Not bad considering I'm plastered, eh?

Oprah Winfrey: It's always seemed to me there's something Harry is repressing. If you send him to the school psychologist, I have a feeling it will all spill out: Harry's a victim of child abuse! (I suspect that horrible uncle.) Unlocking Harry's awful secret will also unlock you. The words will pour out. You will be unblocked, and Harry will heal. Trust me, girl. I'm Oprah. ■

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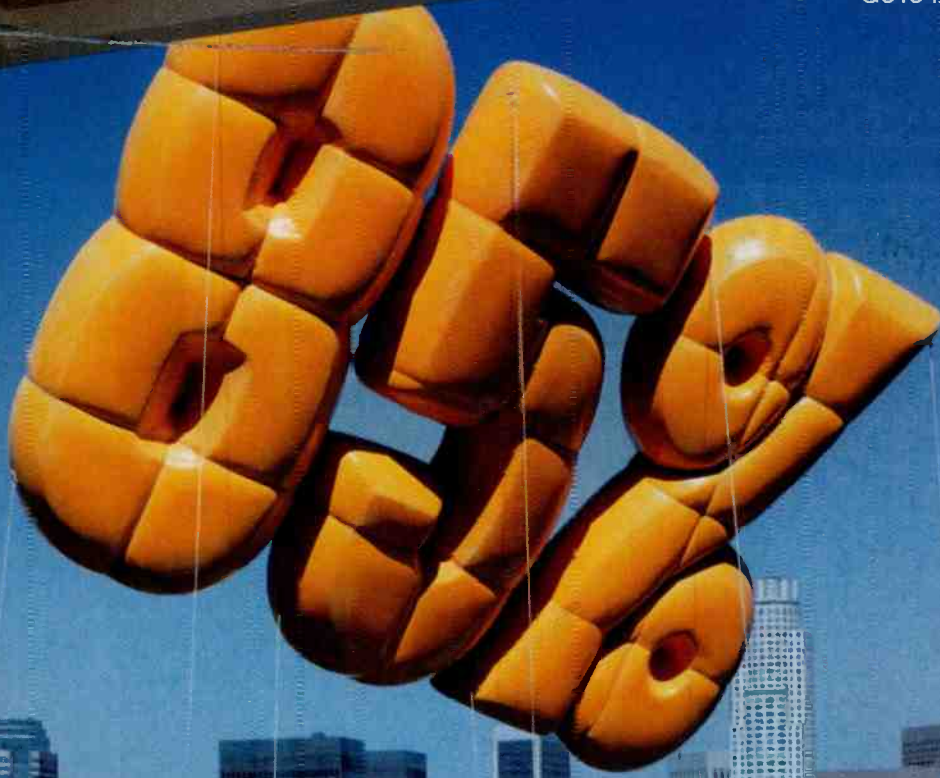
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