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At Deadline

■ SINCLAIR STIRS UP NIGHTLINE DEBATE

Sinclair Broadcast Group's refusal to air ABC's April 30 edition of *Nightline*, during which host Ted Koppel read aloud the names of more than 500 U.S. servicemen and women killed in Iraq in combat, set off a firestorm of comments from legislators and public interest groups. Sinclair, which owns 62 TV stations, eight of which are ABC affiliates, said ABC's move was politically motivated in order to "influence public opinion against the military action in Iraq." Several legislators, including Sen. John McCain (R-Ariz.), sided with ABC.

■ NIELSEN: BLACKS, HISPANICS WEIGH HEAVILY

In an attempt to reinforce its argument that local people meters do not undercount blacks and Hispanics, Nielsen Media Research last week quantified the increases it was making to those TV samples. Characterizing the increases as the "largest ever," Nielsen, which is owned by *Mediaweek* parent VNU, said that blacks will make up 20.8 percent of the LPM sample in New York even though they represent 17.3 percent of the population there. Hispanics will make up 17.9 of the New York LPM sample, compared to 16.1 percent of the population. Despite Nielsen's efforts, Rev. Al Sharpton threatened to file an antidiscrimination lawsuit against the company if it goes forward with its LPM launch in New York on June 2 without taking into account the findings of a task force formed to handle questions about the new measurement system.

■ SYNDICATORS PREP FOR SWEEPS

As broadcasters enter the season's final sweeps period, so do syndicators. King World's *Dr. Phil* is heavily promoting the talk-show host's series-within-a-series, *Relationship Rescue Retreat*, this month, in which six squabbling couples are sequestered in a TV studio. NBC Enterprises' reality soap *Starting Over* promises the first birth of a reality-TV baby, with one participant deciding whether to keep her child or give it up for adoption. And Telepictures' *The Ellen DeGeneres Show* is promoting the monthlong campaign "Make My Day in May," but a spokesperson declined to provide further details.

■ NO CHANGE TO NETWORK UPFRONT PROCESS

The network television advertising upfront buying process will not be changing anytime soon. A group of nearly 40 advertisers, media agencies, advertising trade associations and network sales executives came to

that conclusion after an all-day discussion in New York last Thursday. The group, formally known as the Network Upfront Discussion Group, could not reach a consensus on how to change the current process. "While not a perfect process, the current process is acceptable," said Bob Liodice, president of the Association of National Advertisers, who organized the meeting with O. Burtch Drake, president and CEO of the American Association of Advertising Agencies.

■ CABLEVISION UNVEILS RAINBOW MEDIA UNIT

Cablevision last week announced a three-part structure for its new company, Rainbow Media Enterprises. The divisions are: Rainbow DBS, which includes the new VOOOM satellite service; Rainbow Programming, which includes cable networks AMC, WE and IFC; IFC Productions; 21 VOOOM high-definition channels; Mag Rack, sport-skool and other video-on-demand services; and Rainbow Movies, which includes the Clearview Cinemas theaters. Cablevision chairman Charles Dolan is expected to serve as chairman of Rainbow Media.

■ GOOGLE REVENUE MOSTLY ADS

In filing for its widely anticipated IPO last week, online search service Google showed just how dependent it is on advertising, which accounted for 96 percent of its revenue in 2003, versus 77 percent in 2001, the first year the service sold ads. Since that time, Google's net revenue has skyrocketed from \$86.4 million to \$389.6 million. In its prospectus' discussion of risk factors, Google listed Microsoft, Yahoo and traditional media companies as competitors who could impact its business.

■ **ADDENDA:** King World has canceled low-rated freshman talk show *Living It Up! With Ali & Jack*. Production

will wrap May 27, with episodes expected to air until Sept. 10...**Kenneth Paulson**, executive director of the First Amendment Center and a longtime newspaper editor, was named editor of Gannett's *USA Today* last week. Paulson replaces editor Karen Jurgensen, who resigned April 20 in the wake of reporter Jack Kelly's ethical lapses...**Allison Barnes** was named vp, media director of StarLink Worldwide, a full-service media unit of Starcom Mediavest Group. She is a 12-year veteran of Starcom and its predecessor, the media department at Leo Burnett.



Time Inc.'s Isolde Motley gets real with *Cottage Living* Page 28

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Media Person 18
Mr. TV 30

Market Indicators

NATIONAL TV: STEADY
Second- and third-quarter scatter continues to trickle in, with some renewed interest in prime time following Fox's June start dates for four new fall series. Movie studios, wireless and drug advertisers continue to drive scatter ad sales.

NET CABLE: WARM
Thanks to a gangbuster kids upfront and positive first-quarter earnings from major cable groups, the entertainment upfront could be bountiful for cable. Second-quarter scatter is moving briskly with movies and wireless. CPMs on some nets pushing past last year's price points.

SPOT TV: HOT
Demand is accelerating into June, creating tight conditions in top markets. Along with growing political campaigns, car dealers and movies are also stepping up spending.

RADIO: TIGHT
As the entertainment category kicks in, some markets are beginning to tighten, including Houston, Los Angeles and New York. Other strong categories are home improvement and retail.

MAGAZINES: MOVING
With second quarter wrapping up, men's titles are seeing an uptick in grooming, liquor and financial. For third quarter, men's apparel and accessories are building.

Rise in Movie Spending Helps Lift Kids Upfront

The kids upfront continued at a fast-and-furious pace last week as Nickelodeon, Cartoon Network and Kids WB! completed the majority of their deals, and 4 Kids Entertainment's Fox Box was wrapped up with about 75 percent of its business.

With increases in spending from movie studios, video games, packaged goods and, to a lesser degree, toys, the upfront could grow 12 percent or more and exceed \$900 million. Cost-per-thousand rates grew on average 20 percent for inventory in the "hard eight" pre-Christmas weeks and the period before Easter.

The strength of the market surprised some players in the kids business, but Dan Barnathan, 4 Kids executive vp of sales, said he expected it to be strong, given that broadcast budgets were up 25 percent over last year. "We expected a healthy market, because we saw early on that there was a lot of demand from the Hollywood community," Barnathan said. "There are a lot more family titles coming out in the theater, and then DVDs and video games follow a few months later."

"The best thing about [movie] money," added Al Khan, 4 Kids chairman, is that movies and all the licensed products that go along with them "spend year-round, not just around the holidays."

Meanwhile, ABC's networks have also wrapped up their kids upfront business and are posting double-digit CPM increases. —Megan Larson

Satellite TV Broadcasting Bill Gets House Panel Nod

Legislation is advancing in Washington to move local TV channels off secondary satellite dishes and to entice satellite customers to watch local TV stations rather than signals from far-away networks.

Broadcasters are pleased, but satellite interests say they will work to modify the bill that the House telecommunications subcommittee passed April 28. The measure at issue is a five-year renewal and modification of the law that (continued on page 6)

MTV Nets Aims for Big Upfront Gains

New channels and strong Q1 ratings give Viacom unit sales moxy

THE MARKETPLACE By Megan Larson

Having played a significant role in boosting Viacom's revenue 12 percent in first quarter to a record \$6.8 billion, MTV Networks is primed to enter the fast-approaching upfront this year with an aggressive sales strategy that could nab almost a quarter of the dollars spent on cable.

Though executives aren't saying what revenue or cost-per-thousand rate gains they are seeking, analysts, noting the ratings gains at MTV and Comedy Central, expect MTVN to grow CPMs about 15 percent on average, with MTV on the high end. "I fully expect them to achieve at least mid-to-upper-teen CPM growth with executives hoping for more," said Richard Greenfield, media director of Fulcrum Global Partners. "They have six of the top 10 shows in cable." Kagan World Media analyst Derek Baine tempered that assessment but was still predicting sizable double-digit gains. "Low to mid-teens is more likely," he said.

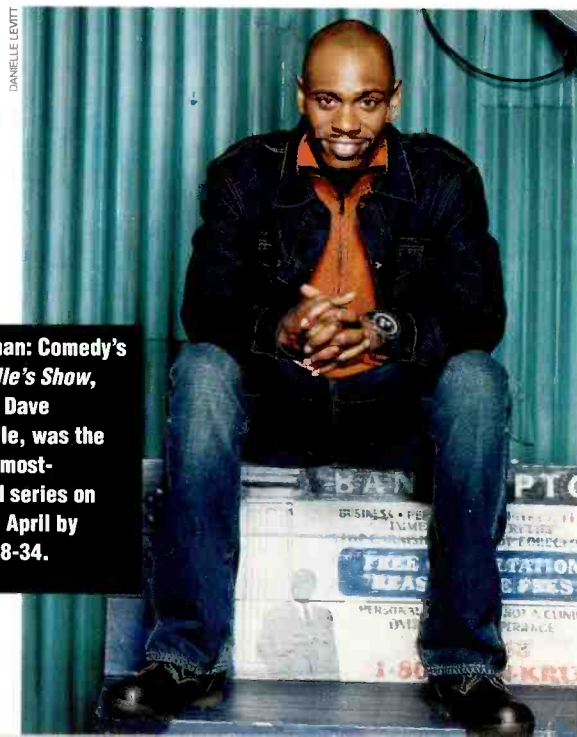
In a year when cable as a whole is growing ratings by offering compelling programming across various genres and advertisers are talking about spending a bigger percentage of their marketing budgets in cable, MTVN will make the case this week during its upfront presentation in New York as to why its channels are the best buy. For starters, MTVN has more gross rating points in the 18-34 demographic than any other TV outlet—206,885 in fourth-quarter 2003. That number grew 11.9 percent year-to-year while the WB, MTV's chief competition for attracting youthful eyeballs, fell 18 percent in fourth quarter last year. (In fact, all the broadcast networks were down, with the exception of Fox which was up 0.9 percent, while other big cable groups Turner and Discovery posted gains of 5 percent to 10 percent.)

MTVN executives also stressed their focus on creat-

ing new marketing opportunities, new networks and new video-on-demand content. Similar to how Turner Broadcasting sells its inventory, MTVN executives will be selling a roadblock, or "integrated units," of five spots across five networks at 10 p.m. that will deliver a 3.4 rating of unduplicated audience that is competitive with broadcast. Moreover, MTVN is selling Noggin's teen block The N and VH1 Classics for the first time in the upfront. "With a confluence of great brands, we can help manage costs and be more efficient," said Mark Rosenthal, COO/president of MTVN.

MTV, VH1, CMT, Comedy Central and Nick at Nite all grew their delivery of 18-to-34-year-olds during first-quarter 2004 through April. The gains were driven in large part by original programming. MTV's *Newlyweds: Nick and Jessica* was a pop-culture juggernaut last year much like *The Osbournes* before it. Last month, two shows in MTV's "10 Spot" at 10 p.m., *Punk'd* and *Real World XIV*, were among the top five programs favored by the 18-34 set. "MTV has a unique ability to reinvent itself with each high school generational span of 4 or 5 years," said John Rash, senior vp/director

Funny man: Comedy's *Chappelle's Show*, starring Dave Chappelle, was the second-most-watched series on cable in April by adults 18-34.



of broadcast negotiations at Campbell Mithun.

Comedy Central, which is fully under the MTVN wing for the first time this year, did not participate in its upfront last year. The network is expected to play a fairly prominent role in the group's revenue gains. Viacom credits Comedy for contributing to 9 percent of MTVN's overall revenue growth in first quarter, which grew 21 percent to hit \$1.4 billion. Comedy Central's *Chappelle's Show* was the top-rated cable show among adults 18-34 in April, netting 2.3 million viewers, and the 7-year-old *South Park* still averages around 1.8 million viewers 18-34. Rash also credits the network's political satire, *The Daily Show With Jon Stewart*, for attracting more eyeballs to the net. "The significance of *The Daily Show* goes beyond its ratings—it is a cultural barometer that other organizations source, making the fake news, ironically, the authority for a lot of young adults." TV Land, probably eclipsed by the success of Nick at Night, was down 33 percent in first quarter.

Going into the upfront, MTVN execs are stressing the relevance each network has to its respective audience. "More and more, consumers are looking for brands they can trust and signposts that can help them navigate an increasingly complex landscape," said Betsy Frank, executive vp of research for MTV.

In a Brand Affinity Study conducted with Intermedia Advertising Group, MTV Nets overindexed on consumer loyalty, trust and relevance. According to the 8,600 teens and adults 18-plus surveyed in April, MTVN indexed a 108 for "shows that interest me" and a 110 for "feeling connected to people and programs" and a 109 on delivering "what it promises." "MTV Networks' consumer connection is to an advertiser's advantage," said Bob Bakish, COO, ad sales for MTVN. ■

Finales Out Front

Networks' sweeps strategy could support summer premieres next May

TV PROGRAMMING By John Consoli

Several broadcast networks have front-loaded their May sweeps schedules with season finales, perhaps as a trial balloon for next year, when they could start airing some of their original summer programming at the tail end of the sweeps.

"If they are headed toward running first-run programming year-round, it really makes sense to start some of that summer programming in May to let viewers know you will be keeping the lights on during the summer," said Steve Sternberg, executive vp, audience analysis at Magna Global USA.

"We're clearly headed toward [doing] that," said Jeff Zucker, president of NBC Entertainment, News and Cable Group. "We are thinking about doing that next year."

NBC aired the season finale of *Will & Grace* last Thursday, and the series finale of *Friends* will air May 6, while *Frasier* and *ER* will conclude on May 13. Fox will air the season finale of its freshman hit drama *The O.C.* on May 5, while the WB will end *Everwood* on May 10, *One Tree Hill* on May 11, *Reba* on May 14 and *7th Heaven* on May 17. The series finale of UPN's *The Parkers* will air May 10. Only CBS will air all of its finales during the final week of the sweeps, which end May 26.

However, Zucker said NBC's May sweeps strategy this season was based more on how the network decided to handle the departure of *Friends*. "We only had 18 episodes of *Friends* for the season, and after February we only had three original episodes left. We would have had

to run a repeat during the first week of the sweeps and then come back with the three original episodes. I didn't want to do that. But there is precedent for ending a series during the first week of the May sweeps. The final episode of *Cosby* aired during the first week of May."

Zucker said once it was decided to move up the *Friends* finale to May 6—when it will air from 9 p.m. to 10 p.m., preceded by a *Friends* clip show—the decision was made to move up *Will & Grace* to the first Thursday of the sweeps (April 29). The *Will & Grace* finale recorded a 9.9/24 in the 18-49 demo, its highest rating and share in seven months.

Preston Beckman, executive vp of strategic program planning at Fox, said his network's decision to air the season finale of *The O.C.* on May 5 was also due to a small number of episodes. "We ran the (continued on page 6)



Fox's *The O.C.*, starring Mischa Barton and Benjamin McKenzie, is among several early finales.

Fox Offers No-Sweat Deal

Media buyers can alter fall upfront buys if shows flop in summer run

NETWORK TV By John Consoli

Media buyers will face a no-lose situation in the May upfront if they buy Fox's four new scripted shows for next season. Fox plans to start airing them in June, so buyers will be able to see how they fare and then decide whether to exercise cancellation options for their fall orders. The shows, dramas *The Jury* and *North Shore* and sitcoms *Method & Red* and *Quintuplets*, begin airing twice a week the first week of June.

In the short term, Fox can benefit by get-

ting a premium for scatter advertising in these first-run scripted shows. "Since 95 percent of the new summer prime-time programming will be reality shows, Fox's original scripted programming should be easier to sell," said Sam Armando, Starcom director of TV research. "CPMs will be higher, but the shows should draw advertiser interest."

Another agency exec, who declined to speak for attribution, suggested the shows could indeed command a premium if Fox can convince

media buyers that new scripted programming can get a summer audience, despite the failure last summer of offbeat cop drama *Keen Eddie*. But Preston Beckman, Fox executive vp of strategic program planning, said *Eddie* was a summer burn-off of a show that Fox chose not to run during the previous season, while the scripted shows airing this summer are ones the network has committed to for next season.

Beckman also said that if the broadcast networks are ever going to move to year-round programming, they have to start doing it. "We know we are taking an enormous risk," Beckman said. "But what we are doing will benefit all the networks, if it works."

He added that the network plans to stick with the shows through the summer regardless of the ratings. ■

Media Wire

lets satellite broadcasters provide broadcast TV service.

The new version would give EchoStar Communications' Dish Network a year to bring all local channels onto one dish, rather than placing some of the channels on a second dish. Some Washington officials have said the practice relegates Spanish-language and niche broadcasters to second-class status. EchoStar execs say the move to a single dish would disrupt service "for an extended period," but not permanently, in 30 to 40 markets.

The bill also would require a choice to be made by 200,000 to 300,000 EchoStar customers who receive broadcast TV programming from distant areas of the country. They could keep that programming or choose to receive local TV stations—but not both. Lawmakers anticipate many customers will opt for their local stations.

Rep. Nathan Deal (R-Ga.) said that as the bill advances, he will offer language to require à la carte pricing by cable and satellite operators. Deal's chances of success are uncertain. —*Todd Shields*

G+J Forms Business Group For Fast Company Inc.

After dismantling its Business Information Group, which was comprised of *Fast Company* and *Inc.*, in 2002, G+J USA Publishing last week again consolidated the two titles into one group, albeit with a leaner management structure. About five staffers stand to lose their jobs.

Advertising and marketing resources of both magazines will be pooled. *Inc.* publisher Lee Jones has been named vp, publisher of The Business Group, and *Fast Company* publisher Jim McCabe has been named vp, marketing development. The two will report to Dan Rubin, G+J executive vp, business development and strategic planning.

"Instead of creating a superstructure that was created in the past, we have people who have been intimately involved with each magazine," explained Rubin. "We can make our relationship with our clients much more efficient."

Through May, *FC's* ad pages fell 26.3 percent to 221 over the year prior, reports the (continued on page 8)

(continued from page 5) first seven last summer, so we only had 20 to get us through the season. Rather than running repeats through April to stretch it out, we decided to run fresh episodes and end it early." Fox is airing the finales of *Tru Calling* and *Arrested Development* early in the sweeps, Beckman said, "because they are fragile shows and we didn't want them to get lost against sweeps competition."

The WB made a similar decision with its shows, not wanting them to necessarily go head to head with Big Four finales. "We aired all original episodes during April and got some big viewership for some of those shows," said Brad Turell, executive vp of network communications. "We got our ratings momentum in

April and will carry it into mid-May. It's not like we're conceding the rest of the month."

Still, "there's always a danger that ratings will start to decline as a network's most popular shows go off the air," said Sternberg. "Once *Friends* ends, you won't get *Friends*-type ratings for your other shows."

But NBC may have a surprise in the works. Some buyers believe the network is going to air the pilot for next season's *Friends* replacement, *Joey*, on the last Thursday of the sweeps. "That's not going to happen," said Zucker, who declined to reveal what is planned for that night. "Jeff does not want to lose the May sweeps," said one media buyer. "You know he has something up his sleeve." ■

NHL Rights Talks on Ice

League's negotiations with ABC/ESPN stall over price; Fox skates clear

TV SPORTS By John Consoli

The National Hockey League seems to be caught between a puck and a hard place in its ongoing TV-rights negotiations.

Concerned that it might be disadvantageous to deal with only one bidder (ABC/ESPN), the league recently contacted Fox to gauge that network's interest in bidding against the incumbent. NHL Commissioner Gary Bettman made the request to Fox Sports chairman David Hill, but Hill said he was not interested, according to sources familiar with the situation.

Hill and an NHL insider confirmed that the pair have spoken, but both sides skirted the issue of whether they discussed a possible bid for the TV contract. "Gary and I have conversations all the time," Hill told *Mediaweek*. The NHL insider confirmed that Bettman and Hill converse from time to time, even though Fox no longer has NHL TV rights.

Fox owned the TV rights for the NHL from the 1994-'95 through '98-'99 season, for

which it paid \$31 million per year. According to Fox sources, the network was prepared to re-up for only half that amount, but the NHL was able to leverage the fact that Fox was bidding against ABC/ESPN, which wound up getting both the broadcast and cable rights for \$120 million. ABC/ESPN paid a heftier price because they would be carrying more games than Fox, primarily on the cable networks. However, ABC/ESPN executives were said to be smarting when they learned how low Fox had bid.

ESPN and ESPN2 carried more than 100 regular-season NHL games the first three seasons of the new contract, but they cut back that number to about 70 the past two. Regular-season ratings on ABC and ESPN were basically flat compared to last season. However, playoff household ratings are up, particularly among men 18-24 and 18-34, according to Nielsen Media Research. For its 15 playoff telecasts, ESPN is averaging a 0.62, up 5 percent. ESPN2 is averaging a 0.43 for 24 telecasts, up 23 percent, and ABC is averaging a 1.4, up 27 percent—a good bargaining chip for the NHL. But while ESPN execs are committed to keeping hockey telecasts on the network in the future, they do not want to overpay.

A Fox insider said the network will not consider joining the NHL bidding because most of its affiliates do not want to give back three hours on Saturday afternoon to air the lower-rated telecasts. "When we aired the NHL, 80 percent of the national ratings came from six major markets," a Fox exec said. "A majority of our affiliates just don't want it." ■



While NHL playoff ratings are up over last year, ABC/ESPN is intent on cutting contract costs.

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Mediaweek Monitor. Over at *Inc.*, ad pages have fared better, up 13.3 percent to 339. —Lisa Granatstein

CBS Sports Airing PGA 'Advertainment' Spots

CBS Sports is airing 60- to 90-second "advertainment" spots during its week-end PGA Tour telecasts through June 5.

Seven different spots, titled *In Real Life*, feature mini-profiles of golf pros on the tour, with only a tag at the end identifying the advertiser, Jeld-Wen, a manufacturer of windows and doors. The spots feature PGA Tour professional Peter Jacobsen as host and profile some lesser-known PGA players, including Steve Elkington, Stewart Cink and Brett Quigley.

John Bogusz, ad sales president for CBS Sports, said the spots are running as paid ads, but he would not reveal the rates. Peter Dempsey, vp of marketing for Jeld-Wen, said it's a way for CBS to expand the depth of its golf coverage, for the PGA to get more exposure for its players and for the advertiser to get national editorial content that it wants to sponsor, along with subtle reinforcement of its brand message. —John Consoli

Ex-GM Exec Guarascio to Run NFL's Marketing, Sales

Phil Guarascio, a longtime General Motors advertising executive who retired in 2000 and has been doing consulting work since, has been hired to head the National Football League's marketing and sales.

He is replacing John Collins, who is leaving as senior vp, marketing and sales to take a job with the NFL's Cleveland Browns. Guarascio has been consulting with the NFL since he left GM. His new job will put him in charge of the NFL's advertising, marketing, market research and media planning, among other areas.

Guarascio, 61, spent 21 years with advertising agency Benton & Bowles before joining GM in 1985. He spent 14 years at GM, where he was credited with leveraging the company's resources through strategic buys in sports media and telecasts. —JC

Slow Growth at AOL

Sales operation streamlined at Web giant as ad revenue ticks up qtr. to qtr.

THE INTERNET By Catharine P. Taylor

Time Warner's troubled America Online is slowly improving its fortunes, as evidenced by the release of company and division earnings last week, which showed a recent uptick in ad revenue. But those looking for a first-quarter rebound the likes of which happened to competitors Yahoo and MSN will



Kelly has streamlined AOL's sales structure.

have to wait a bit longer. Revenue for AOL—which also includes nonproprietary services—was flat compared to the same period last year at \$2.2 billion; ad revenue was down 5 percent, which the company attributed to the continuing expiration of multiyear ad deals signed during

the dot-com heyday and a \$31 million reduction in intercompany revenue. On the plus side, ad revenue was up sequentially, from \$204 million in fourth-quarter 2003 to \$214 million in first-quarter 2004.

The difference in AOL's performance compared with rivals Yahoo and MSN is stark. Yahoo reported a marketing services revenue jump of 235 percent to \$635 million, compared with the same period a year ago, while Microsoft's MSN saw a 43 percent increase to \$333 million in ad revenue for the same quarter—even though the three have comparable reach.

Mike Kelly, appointed to the new role of president of AOL Media Networks in January, said AOL was behind in leveraging the popularity of its properties but making progress. "We're really, I think, ahead of the market in terms of programmed environments for advertising," he said.

Media executives pegged hints of an AOL ad-sales turnaround to two factors: the service's shift to being completely html-based by year's end, which will put such online ad essentials as ad production, optimization and tracking in line with what the rivals are already doing; and the appointment of ex-*Entertainment Weekly* publisher Kelly. So far, Kelly's biggest move has been to streamline the sales organization, which at one point was so diffuse it could take dozens of internal steps to do an ad deal. ■

CAB Study Explores TV Use

Tune-in rate similar for b'cast and cable, but viewers 'connect' with cable

CABLE TV By Megan Larson

The first findings of "How People Use TV," a study conducted by the Cable Advertising Bureau and Knowledge Networks/SRI, show that viewers make little distinction between broadcast and cable but tend to be more "connected" to cable programs.

The research follows a six-month period in which the CAB consulted with agencies and advertisers regarding TV consumption. "For every person who didn't think there was a difference between the way viewers used cable or broadcast, someone else thought there might be," said CAB president, CEO Sean Cunningham, explaining the motivation behind the study.

Conducted in February and March with more than 2,000 respondents, the study showed that TV watchers are "just as likely to turn on a cable channel [38 percent] as a broadcast channel [37 percent] and watch for

30 minutes," said Cunningham. But he added that "connectivity issues like loyalty and attention span" are stronger in cable. In the KNSRI study, 39 percent of the respondents had loyalty to cable shows compared with 21 percent who were loyal to broadcast programs, and 68 percent said that cable had the type of programming not found elsewhere.

Moreover, more than 40 percent of respondents said that certain cable networks would be most missed if taken off the air (23 percent said this about broadcast nets) and that cable shows had greater "watercooler" potential, compared with 21 percent for broadcast.

Another finding was that prime time isn't 8-11 p.m. for some viewers, especially men 18-34, who typically start watching at 10 p.m.

The CAB plans to conduct the next phase of its TV-usage research this summer. ■

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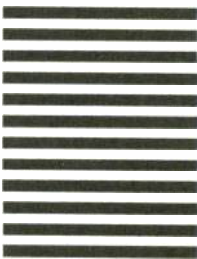
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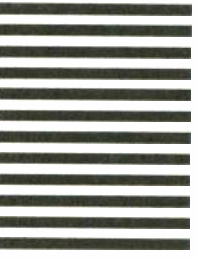
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local media

TV STATIONS | RADIO STATIONS | CABLE | NEWSPAPERS | MAGAZINES | OUTDOOR

RADIO STATIONS

Stern Grows Ratings Despite Indecency Onslaught in D.C.

BY KATY BACHMAN

In the middle of Arbitron's Winter survey (Jan. 8–March 31), the Federal Communications Commission handed down record-breaking indecency fines, putting Howard Stern and Infinity Broadcasting in its crosshairs. But listeners responded by handing Stern some of his biggest ratings in years. Since Feb. 25, when Clear Channel Communications pulled Stern from six stations, he has been playing the First Amendment controversy for all its worth, including a revamped Web site that is pointedly political.

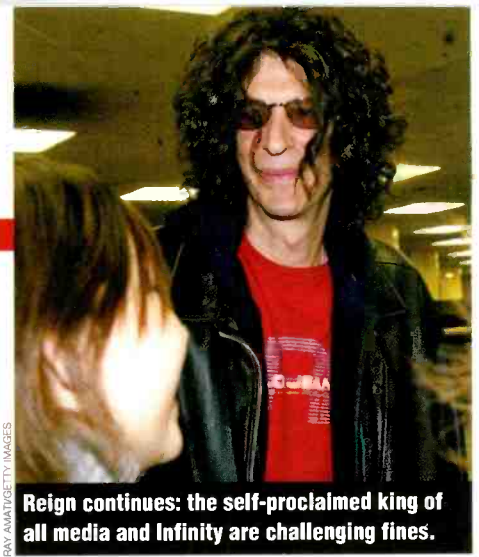
In New York, where Stern broadcasts from Infinity's WXRK-FM, he jumped to No. 1 from No. 3 with an overall share of 7.2, his best since Fall 2000. While it's a no-brainer that Stern is tops among male listeners, Stern was also No. 1 in every demographic including adults 18-34 and 25-54. On KLSX-FM in Los Angeles (also owned by Infinity), Stern jumped to fourth place from sixth overall and was No. 1 among adults 25-54, a feat he hasn't achieved in L.A. since 1995. Chicago has never been one of Stern's best markets, but even there his ratings boosted the show to the No. 9 position from No. 15 on Infinity's WCKG-FM. In Boston, where Stern airs on Infinity's WBCN-FM, the show jumped into second place with an 8.2, from sixth with a 4.6. Stern's show saw smaller gains on Infinity stations in Philadelphia, Washington, D.C., and Detroit.

The six Clear Channel stations that axed Stern's show felt some ratings pain. Sans Stern, mornings on WXDX-FM in Pittsburgh dipped by nearly three share points to a 3.6 from 6.4, sending the station overall to eighth place from sixth. KIOZ-FM in San Diego slipped to sixth from fifth in morning drive. The winter reports for the other four markets, Orlando and Fort Lauderdale, Fla., Rochester, N.Y., and Louisville, Ky., were not out by deadline.

Not all shock jocks targeted by the FCC had a good book. Mancow (a.k.a. Eric Muller) on WKQX-FM, Emmis Communications' Alternative Rock station in Chicago, saw his ratings plummet to 2.5 from 3.4, dropping him to No. 17 from No. 14. The station is in an all-

out war with ABC Radio's alternative rock WZZN-FM, which decided to take on WKQX two years ago. Both stations' share fell in Winter to tie at a paltry 1.6 overall share, an all-time low for WKQX. The stand-off doesn't look to end any time soon. "We aren't going away," vowed Jeff Smulyan, CEO of Emmis.

Stern wasn't the only personality on the radio to add listeners. At the tail end of the Winter survey and amid protest over Univision Radio's management policies, No. 1 Hispanic personality Renan Almendares Coello, (a.k.a. El Cucuy), jumped from afternoon drive on KSCA-AM to morning drive on rival KLAX-FM, owned by Spanish Broadcasting System. With only 9 days of the survey left, Coello had an immediate effect on the sta-



Reign continues: the self-proclaimed king of all media and Infinity are challenging fines.

tion's overall share, helping KLAX to pull ahead of KSCA.

"I've never seen anything like this," said Bill Tanner, executive vp of programming for SBS. "You get the real deal and you get astonishing ratings." By the twelfth and last week of the survey, Coello had the No. 1 radio show in the market with a 9.0 overall share.

Ryan Seacrest, who last month took over Rick Dees' morning slot on KIIS-FM, Clear Channel's Top 40 station in L.A., helped boost that station's sagging ratings. The morning show was up overall from 2.9 to 3.6, moving the station up in rank to fifth from No. 10. Not only did KIIS benefit from adding one of the nation's top media personalities to its lineup, but pop music is also undergoing a revival.

RADIO STATIONS

Premiere Radio Networks to Trump: You're Hired



Trump's new radio show will hit a wide range of topics.

Donald Trump is adding radio to his media conquests. On June 15, Trump will debut as host of a daily feature called *Trumped!* syndicated by Premiere Radio Networks, the Clear Channel programming division announced last week.

Business icon and author of best-selling books *The Art of the Deal* and *How to Get Rich*, Trump surprised TV pundits by captivating Americans on NBC's break-out reality hit, *The Apprentice*. The two-hour finale on April 15 drew 28 million viewers. Now Trump is looking to extend the Trump brand to radio with 60 to 90-second daily radio segments in morning drive that will span business and non-business topics alike. On Friday mornings during the second season of *The Apprentice*, Trump will talk about why he fired the candidate on the previous night's show. Trump will also lend his voice to commercials for advertisers.

"Trump's style on radio is much like you see on TV. He has a broad appeal across demographics," said Sean Compton, vp of programming for Clear Channel and Premiere, who first approached Trump with the idea in early March. As part of its pact with Trump, Premiere is helping him build-out studios at his Fifth Avenue office and other locations "so that if something breaks, he can be all over it," Compton said.

Clear Channel wasn't the only radio company wooing Trump. Westwood One found out about the potential deal, and made their own pitch. In the end, Compton said Trump was impressed with Clear Channel's long list of stations and talent such as Rush Limbaugh and Ryan Seacrest. And the negotiations? Compton characterized them as "brutal." —KB

market profile

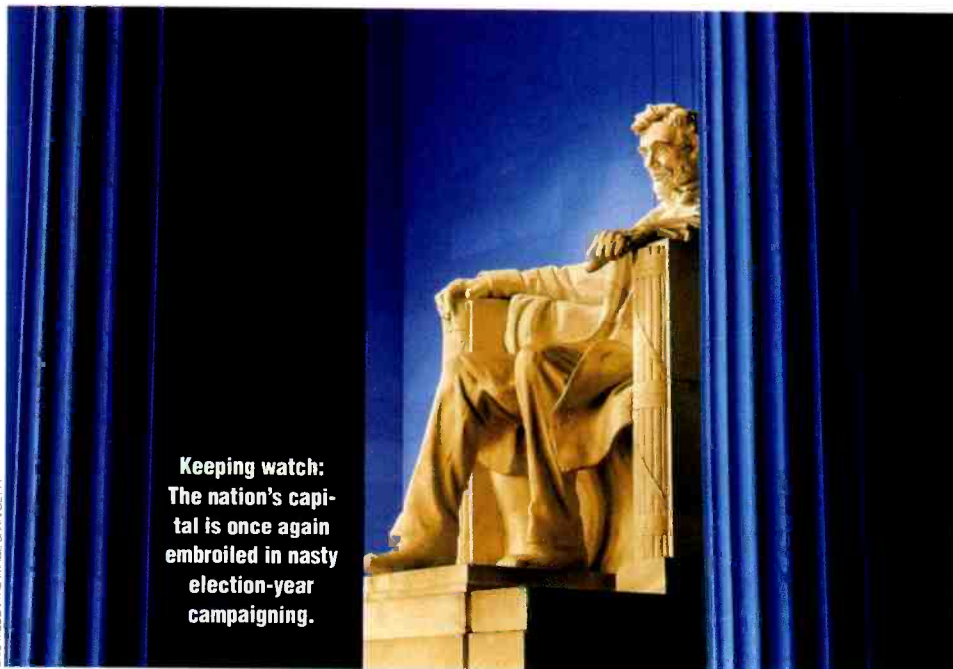
BY RICHARD ZITRIN

On both coasts, Top 40 was up. Ratings for Clear Channel's Contemporary Hit Radio WHTZ-FM in New York were up a full point overall from 3.7 to 4.7. "We hope this is the start of a turnaround for Contemporary Hit Radio," said Tom Poleman, senior vp of programming for Clear Channel, naming artists such as Britney Spears, Jessica Simpson and Hillary Duff, all who had hits during the Winter survey period. WHTZ-FM also rejiggered its playlist, mixing in more Rock and Hip Hop from the likes of bands such as Linkin Park, Maroon5, OutKast and Evanescence.

TV AND RADIO STATIONS

Addenda:

Journal Broadcast Group announced last week it will enter the Green Bay, Wis., TV market with a deal to purchase WGBA-TV, the NBC affiliate owned by Aries Telecommunications. As part of the \$43.2 million agreement, JBG will assume WGBA's local marketing agreement with WACY-TV, the UPN affiliate owned by Ace TV. Depending on the resolution of the duopoly rules at the FCC, JBG also has an option to purchase WACY. The transaction will give the Milwaukee-based media company, which owns WTMJ-TV in Milwaukee, two NBC affiliates in adjacent markets. JBG also owns two radio stations in Milwaukee, WTMJ-AM and WKTI-FM and the *Milwaukee Journal Sentinel* daily newspaper... **Entercom Communications**, the fourth largest radio group in terms of revenue, announced recently it will enter the Indianapolis market with an agreement to purchase Modern Adult Contemporary WZPL-FM, Adult Contemporary WTPI-FM and News/Talk WXNT-AM from MyStar Communications, for \$73.5 million. Through a time brokerage agreement, Entercom will begin operating the stations in mid-June... **Radio One** last week agreed to pay \$35 million to acquire the stock of New Mableton Broadcasting Corp., owner of Urban Oldies WAMJ-FM in Atlanta. NMB's majority shareholder is Alfred Liggins, CEO of Radio One, which has been operating the station under a local management agreement since August 2001. Including WAMJ, Radio One has four FM stations in the market —KB



Keeping watch:
The nation's capital is once again embroiled in nasty election-year campaigning.

ERIC NEDLATH/IMAGE BANK/GETTY

Washington, D.C.

POLITICS HAS BEEN THE NO. 1 SPORT IN WASHINGTON SINCE THE FEDERAL SEAT OF government moved there from Philadelphia in 1800, but many Washingtonians are hoping there soon will be a new game in town: Major League Baseball. A top-10 media market with a population of roughly

5.8 million, D.C. is considered a leading candidate for the new home of MLB's financially struggling Montreal Expos.

Local politicians and business leaders have been lobbying for years to bring the national pastime back to the nation's capital, which lost its big-league team 33 years ago when the

Washington Senators moved to the Dallas-Fort Worth area and the team became the Texas Rangers.

Groups on both sides of the Potomac have been eying the Expos, but the prospective Washington, D.C., ownership team might have edged ahead of its competitors in suburban Virginia and elsewhere when Mayor Anthony Williams announced in April that the city would foot the entire bill for a \$340 million stadium. In shopping around for a new home for the Montreal franchise, MLB is insisting that any new stadium be paid for totally with public money. Washington, D.C., is the first city to meet that demand.

Financier Fred Malek, who once owned the Texas Rangers with President Bush and several other investors, heads the Wash-

NIELSEN MONITOR-PLUS AD SPENDING BY MEDIA / WASHINGTON, D.C.

	Jan.-Dec. 2002	Jan.-Dec. 2003
Spot TV	\$526,090,627	\$582,803,104
Local Newspaper	\$281,913,830	\$311,087,930
Spot Radio	\$177,745,910	\$177,572,830
Outdoor	\$17,248,579	\$19,282,617
FSI Coupon	\$15,225,340	\$14,314,550
Local Magazine	\$12,989,020	\$15,640,570
Local Sunday Supplement	\$6,358,450	\$6,608,020
Total	\$1,037,571,756	\$1,127,309,621

Source: Nielsen Monitor-Plus

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NO MATTER WHAT TIME OF YEAR, OLN CONSISTENTLY
DELIVERS OUTSTANDING PROGRAMMING FOR MEN.



SPRING: In *NASCAR Outdoors*, top drivers try their hands hunting and fishing in a show that appeals to a powerful combination of 75 million NASCAR fans and the Network's over 50 million hunting and fishing enthusiasts. **SUMMER:** Last summer over a million viewers tuned in daily to *The Tour de France* on OLN. This year's Tour is not to be missed as Lance Armstrong goes for a record-shattering 6th Tour de France victory. **FALL:** Get sideways in your lounge as you watch the *Gravity Games*—the most popular action sports event to hit the airwaves. **WINTER:** *Picabo Street's Snowzone* is just the tip of the iceberg of OLN's action-packed snow sports offerings. It achieved the highest male viewer numbers* among all cable networks in prime. To find out more, call your OLN sales representative today.

OUT YOU GO

market profile

NIelsen RATINGS / WASHINGTON, D.C.

EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

Evening News

Time	Network	Station	Rating	Share
4-5 p.m.	NBC	WRC	4.1	11
5-6 p.m.	NBC	WRC	4.9	11
	ABC	WJLA	4.0	9
	WB	WBDC*	3.8	8
	Fox	WTTG	3.5	8
	CBS	WUSA	3.2	7
	UPN	WDCA*	0.7	2
	Univision	WMDO*	0.4	1
	Pax	WPXW+*	0.3	1
6-6:30 p.m.	NBC	WRC	7.0	13
	CBS	WUSA	4.6	9
	ABC	WJLA	4.5	9
	Fox	WTTG*	4.4	8
	WB	WBDC*	3.2	6
	UPN	WDCA*	0.7	1
	Univision	WMDO	0.7	1
	Pax	WPXW+*	0.3	#
6:30-7 p.m.	NBC	WRC	7.0	13
7-7:30 p.m.	CBS	WUSA	3.5	6

Late News

Time	Network	Station	Rating	Share
10-11 p.m.	Fox	WTTG	6.1	10
11-11:30 p.m.	NBC	WRC	7.2	14
	CBS	WUSA	6.1	12
	ABC	WJLA	4.7	9
	Fox	WTTG*	3.1	6
	WB	WBDC*	2.0	4
	UPN	WDCA*	1.4	3
	Univision	WMDO	0.5	1
	Pax	WPXW+*	0.2	#

*Non-news programming. #Below minimum reporting level. Source: Nielsen Media Research, March 2004.

ARBITRON RADIO OWNERSHIP

Owner	Stations	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Clear Channel Communications	2 AM, 6 FM	19.8	\$90.3	22.8%
Infinity Broadcasting	1 AM, 4 FM	14.6	\$85.4	21.5%
ABC Radio	1 AM, 2 FM	11.0	\$55.2	13.9%
Bonneville International	1 AM, 4 FM	13.1	\$52.3	13.2%
Radio One	2 AM, 2 FM	12.3	\$49.0	12.4%
Howard University	1 FM	4.5	\$21.0	5.3%
Mega Communications	1 AM, 2 FM	2.6	\$3.8	1.0%

Includes only stations with significant registration in Arbitron diary returns and licensed in Washington, D.C. or immediate area. Share data from Arbitron Fall 2003 book; revenue and owner information provided by BIA Financial Network.

ington ownership group.

A major obstacle for efforts to lure the Expos to D.C. has been the opposition of Peter Angelos, who owns the MLB's Orioles, about 40 miles away in Baltimore. D.C. also has a number of competitors for the franchise, including Norfolk, Va.; Portland, Ore.; Las

Vegas; Monterrey, Mexico; and San Juan, Puerto Rico. A decision on where the team will be moved to may come by this summer.

Frederick Ryan Jr., president and COO of Washington, D.C.-based Allbritton Communications, says there is considerable community and financial support in the market for a

Major League Baseball team.

"There's really just a surprise why some cities can have two baseball teams and Washington, D.C.—the nation's capital, the eighth-largest media market in the country—can't have one," Ryan says. "We're very hopeful that a team will come."

If a professional baseball team were to plant its flag in Washington, it likely would help improve an already flush advertising picture in the capital. Ad spending was up nearly \$90 million to well over \$1.1 billion last year, up 8.7 percent from 2002, according to Nielsen Monitor-Plus (see chart on page 10). TV advertising led the way last year with just under \$583 million, an increase of nearly 11 percent over the previous year.

With 2.2 million TV homes, D.C. is "very strong right now," in part because of some new advertisers that have pumped money into the marketplace, says Jerry Martin, vp and general manager of Tribune Broadcasting's WB affiliate WBDC-TV. "Airlines have spent a decent amount of money in this marketplace, and this is new this year," Martin says. "The banks have been pretty active. Auto is always active. So this market's been fairly strong."

NBC owned-and-operated WRC-TV is No. 1 in every newscast for which it has news competition and is the top-rated station from 9 a.m. to midnight. WRC also is the market's revenue leader, with \$123 million in 2002, the latest figures available from BIA Financial Network. Fox Television Stations' O&O WTTG-TV was second in revenue in 2002 with \$102 million, and Allbritton's ABC affiliate WJLA-TV ranked No. 3 with \$100 million.

WRC president/gm Michael Jack says he is pleased with what he terms "tremendous growth" in the station's 6-7 a.m. newscast, which recorded a 6 rating/21 share in the February sweeps. "This is the first time we or anyone else has hit a 6 in the morning," Jack says. "That's a big rating, and it compares favorably with afternoon ratings on a number of other stations. It just speaks to people continuing to adopt morning news as a news vehicle for them."

At Gannett's WUSA-TV, changes are in the works on the news anchor desk. The CBS affiliate, which launched the market's first 7 p.m. local newscast last September with former ABC network overnight anchor Derek McGinty, has hired former WTTG anchor Tracey Neale. Neale, who was at the Fox station for nine years, is expected to start on the air at WUSA in August, says Darryll Green, WUSA president and gm. Neale's anchoring slots have not been determined, he says.



**“Maybe I’ll go pro
when I’m 10.”**

Mitchie Brusco, 6, defies gravity
and expectations, in PEOPLE

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People
2004
30TH ANNIVERSARY



SETTING:
Emergency Room

[Carter has just found out about Mark's inoperable brain tumor.]

CARTER:
Oh, Mark, I'm sorry.
What are you gonna do?

MARK:
Die, I guess.

Great Writing.
Great Drama.

ER



SHOW TIMES M-F 10 & 11AM(ET)

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market profile

SCARBOROUGH PROFILE

Comparison of Washington, D.C.

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Washington Composition %	Washington, Index
DEMOGRAPHICS			
Age 18-34	32	32	100
Age 35-54	40	43	107
Age 55+	28	25	90
HHI \$75,000+	31	48	156
College Graduate	13	16	121
Any Postgraduate Work	11	19	173
Professional/Managerial	23	34	152
African American	13	23	181
Hispanic	14	8	59

MEDIA USAGE-AVERAGE AUDIENCES*

Read Any Daily Newspaper	53	58	108
Read Any Sunday Newspaper	62	65	105
Total Radio Morning Drive M-F	22	23	104
Total Radio Afternoon Drive M-F	18	18	100
Total TV Early News M-F	28	25	87
Total TV Prime Time M-Sun	38	38	100
Total Cable Prime Time M-Sun	14	14	100

MEDIA USAGE-CUME AUDIENCES**

Read Any Daily Newspaper	73	77	105
Read Any Sunday Newspaper	76	78	102
Total Radio Morning Drive M-F	75	78	104
Total Radio Afternoon Drive M-F	73	75	103
Total TV Early News M-F	70	67	96
Total TV Prime Time M-Sun	92	92	100
Total Cable Prime Time M-Sun	62	64	103

MEDIA USAGE-OTHER

Accessed Internet Past 30 Days	62	71	115
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HOME TECHNOLOGY

Owns a Personal Computer	69	76	110
Purchase Using Internet Past 12 Months	42	51	120
HH Connected to Cable	67	71	106
HH Connected to Satellite/Microwave Dish	18	18	100
HH Uses Broadband Internet Connection	20	20	100

*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: 2003 Scarborough Research Top 50 Market Report (August 2002 - September 2003)

WUSA's new 7 p.m. newscast delivered a 3.5/6 in March and was tied for fourth in the time period.

There are also changes at the top of Allbritton's WJLA and its regional cable news network NewsChannel 8. In March, president and COO Ryan assumed additional responsibilities as gm of Allbritton's two news outlets. Ryan replaced Christopher Pike, who was

named to the new position of vp of sales for Allbritton's seven ABC stations.

Veteran CNN newsmen Leon Harris began anchoring WJLA's 5, 6 and 11 p.m. newscasts in November and is "off to a very strong start," Ryan says. WJLA ranked second in March at 5 p.m. with a 4/9, third at 6 p.m. with a 4.5/9, and third at 11 p.m. with a 4.7/9.

In January, Tim Brant became WJLA's lead

sports anchor, replacing Rene Knott, who is now at Gannett's NBC affiliate KSDK-TV in St. Louis. Brant will continue to call play-by-play on college football for ABC Sports and Atlantic Coast Conference college basketball on the Raycom-Jefferson Pilot Television Network. WJLA also has picked up former NBC anchor Jane Pauley's syndicated talk show and plans to begin airing it at 10 a.m. weekdays in the fall.

WBDC has lined up several syndicated shows for the 2005 season—*The Bernie Mac Show*, *My Wife & Kids*, and toned-down versions of both HBO's *Sex and the City* and *South Park*. The WB affiliate also will begin broadcasting *Friends* in June 2006, Martin says, adding that ratings and revenue are growing at WBDC, which broadened its reach after installing a new antenna a year and a half ago.

In keeping with a leading news story in Washington this year—the presidential election—WBDC this spring is launching a public service campaign, dubbed “I Vote,” and will air three half-hour specials as well as public service announcements.

Washington is a strong Hispanic market, according to Rudy Guernica, gm and vp of Entravision Communications' Univision affiliate WMDO, Independent station WJAL, and Univision's Telefutera affiliate WFDC. “This is a terrific market,” Guernica says. “This is the most affluent Hispanic market in the country, it is the most diverse in terms of national origin, and there is a significantly strong Hispanic business community here.”

WMDO airs 6 and 11 p.m. weekday newscasts, while ZGS Broadcasting's Telemundo affiliate WZDC has a 6 p.m. weekday newscast (WZDC does not subscribe to Nielsen ratings). Guernica says he is hoping to launch a weekend newscast on WMDO by the fall.

In sports, Comcast SportsNet has the rights to MLB's Baltimore Orioles and is producing and broadcasting 90 games this season (three spring-training games and 87 regular-season games). Fox's UPN affiliate WDCA-TV is carrying 65 Orioles games. CSN also has the rights to the National Basketball Association's Washington Wizards and National Hockey League's Washington Capitals. The regional sports network carried 55 of each team's games this past seasons. WBDC aired 15 Wizards games and 16 Capitals games.

Comcast SportsNet also features Atlantic Coast Conference sports and is broadcasting 15 games this season of the local professional soccer team, D.C. United of Major League Soccer. Teenage phenom Freddy Adu, who turns 15 on June 2, joined the team this year

and is the youngest athlete in a major American league in more than a century. As policy, Comcast SportsNet does not release sales figures or ratings, but “the interest in D.C. United this year has increased across all fronts,” spokesman Chris Helein says.

Comcast is the leading cable TV provider in Washington, and its local interconnect, Comcast Spotlight Washington Interconnect, covers 1.4 million homes, or 87 percent of all cable homes in the DMA. Comcast Spotlight Washington Interconnect inserts on 38 networks, while most local zones insert on 40 networks. Along with Comcast, the interconnect includes Adelphia, Cox and a few smaller cable companies. Comcast SportsNet's sales group was recently folded into Comcast Spotlight.

Clear Channel Communications and Infinity Broadcasting, with 13 stations between them, took in nearly 45 percent of the ad revenue last year in the Washington radio market, which is ranked No. 8 with a population of 4,041,300 listeners 12-plus.

“It's an excellent radio market,” says Bennett Zier, Clear Channel's regional vp. “The economy is healthy. People are very positive. The advertising is growing. And radio is starting to occupy much higher ground in advertisers' minds.” The top-rated stations, Bonneville International's News WTOP-AM/FM and Infinity's Rhythmic Contemporary Hit station Radio WPGC-FM, also were the top billers in 2003, generating \$36.6 million and \$32.4 million, respectively.

WTOP-AM/FM, which also trimulcasts on Bonneville's News station WXTR-AM in Frederick, Md., was No. 1 in morning drive in the Arbitron fall book with an average-quarter-hour share of 8.3, and tied for second in afternoon drive with Radio One's Urban Adult Contemporary station WMMJ-FM. Both outlets had 5.9 shares.

WPGC-FM was tops in afternoon drive in the fall with a 7 and No. 2 in morning drive with a 7.3. The Infinity station, No. 1 for total day in the fall book with a 7.3 share, has stiff competition for advertisers targeting African-American listeners. The African-American population makes up nearly 25 percent of the market. WPGC-FM's main competitors are WMMJ-FM—which had a total-day 6.4 share in the fall book, ranked second in morning drive with a 5.9 and tied for third in afternoon drive—and Radio One's Urban Adult Contemporary WKYS-FM, which delivered a 4.6 total-day share, was fourth in morning drive with a 4.6 and fifth in afternoon drive. Howard University's Urban (continued on page 17)



SETTING:
New York City
Restaurant

MIRANDA:
I'm sorry. If a man is over 30 and single, there's something wrong with him. It's Darwinian. They're being weeded out from propagating the species.

CARRIE:
Okay, what about us?

MIRANDA:
We're just choosy.

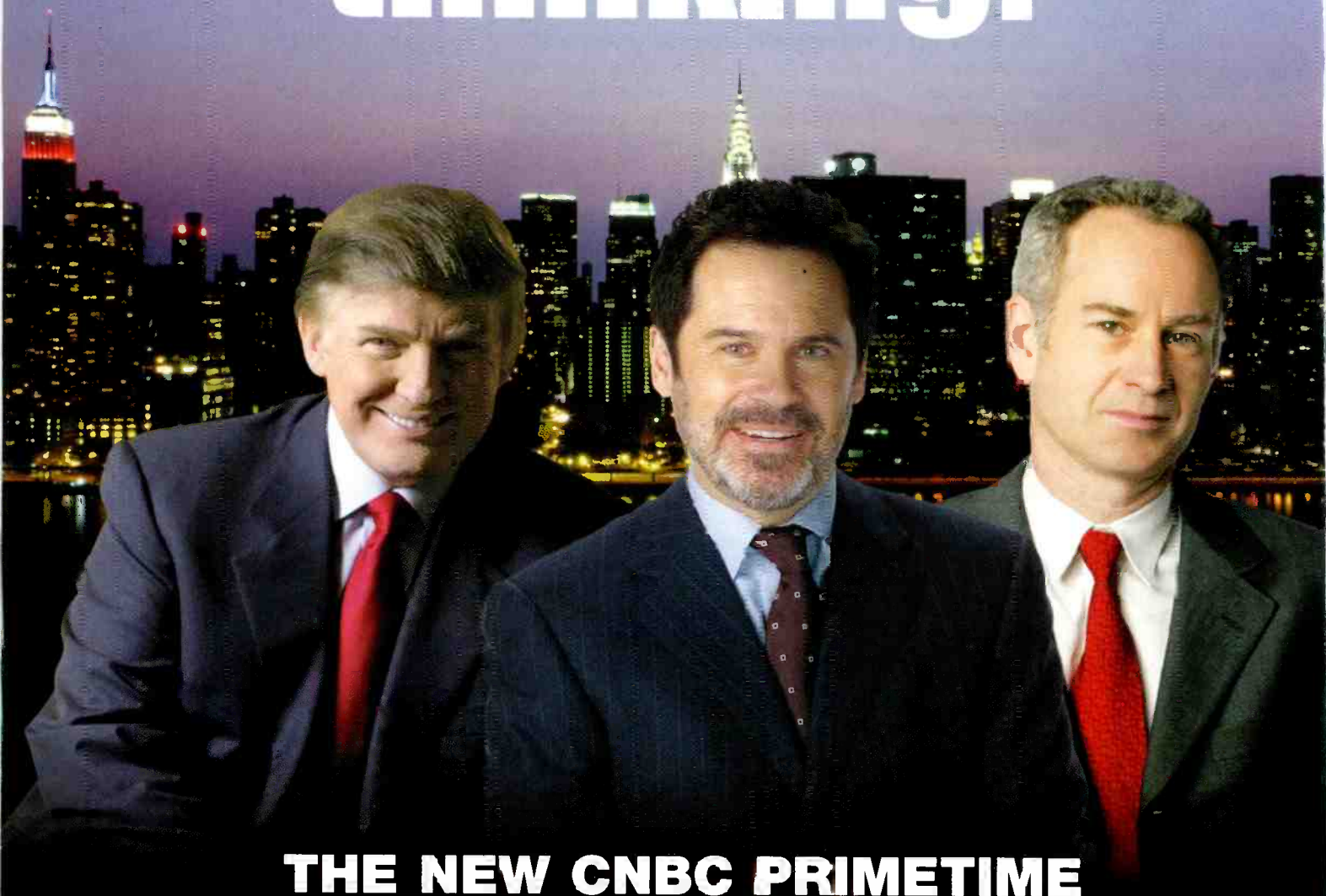
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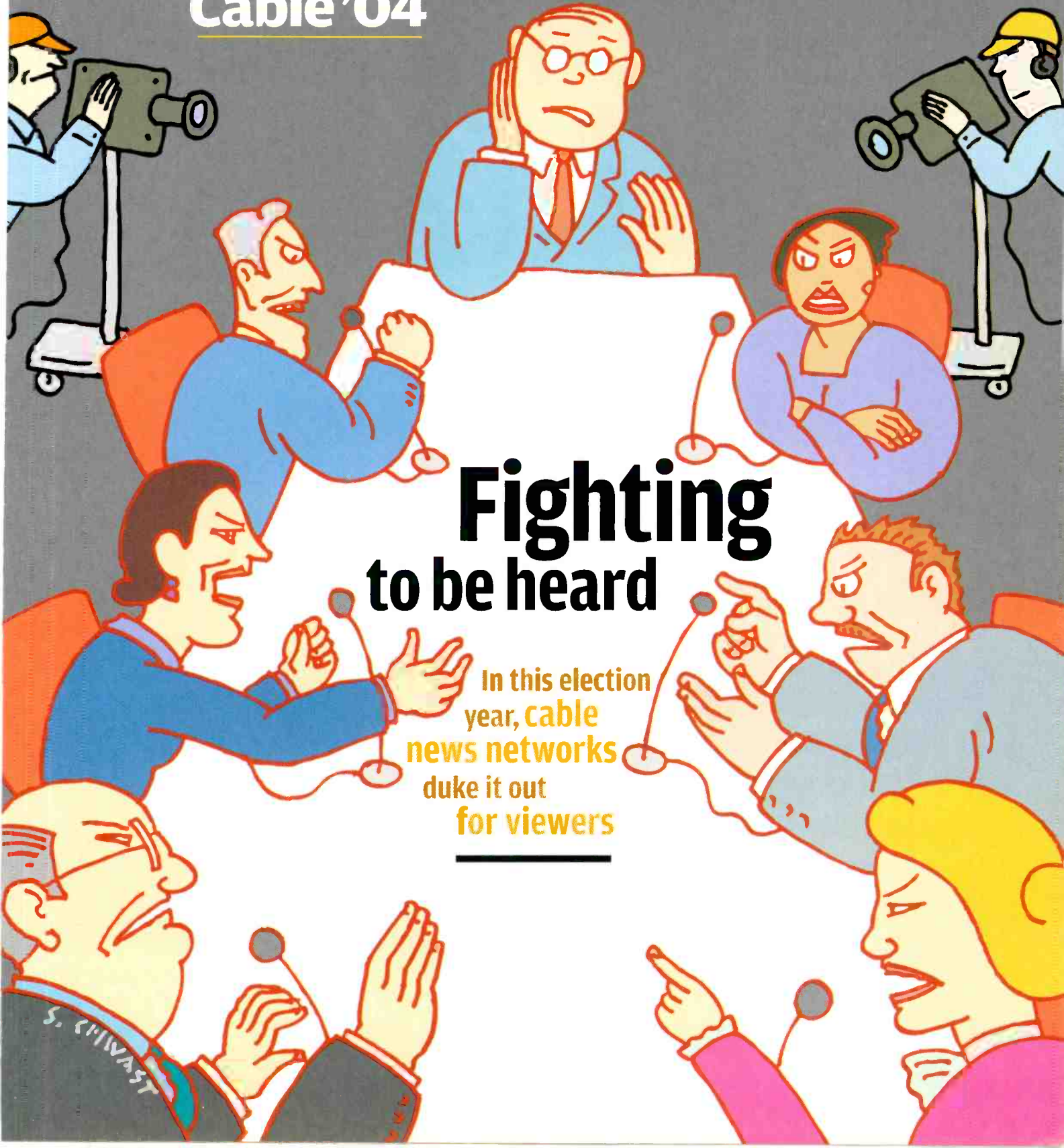
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ADWEEK MAGAZINES

Special Report

MAY 3, 2004

Cable '04



Fighting to be heard

In this election
year, cable
news networks
duke it out
for viewers

S. CHIVAST

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- A25-54 delivery +23%
- A18-49 delivery +23%

Where Movie Lovers Come Together



TV FOR MOVIE PEOPLE

© 2004 AMC. All Rights Reserved. *Source: Nielsen Media Research 2002/03 season-to-date (9/30/02-3/30/03) vs. 2003/04 season-to-date (9/26/03-3/23/04), primetime: M-Su 8P-11P, HVA18-49/A25-54 (000). Subject to qualifications made upon request.

Cable

'04

Contents

Change is usually a good thing, no matter the business you're in, because it means you're probably moving forward. Take Discovery Communications, one of the truly original brands in the cable industry. Not only has the company aggressively grown its roster of cable services, it has worked very hard to keep them all finely tuned, much like the machinery showcased on Discovery's programs. Billy Campbell, who was hired by Discovery founder and chairman John Hendricks to revive the flagship channel's sagging fortunes, has pulled off an impressive feat: changing attitudes, programming and ad sales, all without throwing the company's heritage out the window. Megan Larson's story, beginning on page 20, gets the inside track on how Campbell and his smart hire of Joe Abruzzese to run the ad sales side of the operation has yielded vastly improved ratings and ad revenue.

The cable industry is also pressing hard for change in the halls of Washington, over the tedious but vital issue of must-carry legislation. The matter, as Todd Shields reports, on page 6, takes on greater gravitas because of the accelerated rollout of digital television in cable homes. As more homes sign up for digital cable, or high-definition TV service, subscribers begin to find out just how much the standoff between broadcasters and cable affects what they end up seeing. The irony is that both sides do need each other—they just don't know how to hammer out an accord without having the government force it on them (which, of course, causes them both to complain loudly).

Change has been constant among the 24-hour news networks, now that Fox News Channel has essentially cemented its position as the leader of the triumvirate that includes the veteran CNN and the well-connected but still weak MSNBC. Alec Foege dissects the latest numbers and trends affecting the news networks through the prism of this fall's presidential elections, which promise to provide them all with plenty to cover, if they can get through the pre-convention lull. His story begins on page 10.

Michael Burgi
Editor, Mediaweek

6 CARRYING ON

Cable is squaring off against the broadcast nets over must-carry laws; the FCC works out a plan.

BY TODD SHIELDS

10 HEARTS AND MINDS

Sure, the race is between Bush and Kerry. But it's also for viewership among Fox News, CNN and MSNBC.

BY ALEC FOEGE

16 GROWING PAINS

Mid-tier cable networks poised for gains look for their breakout hits.

BY ERIC SCHMUCKLER

20 BRAIN GAIN

One year after Billy Campbell took over at Discovery Networks, he's made programming more entertaining and found the right people to sell it. How he defied the critics.

BY MEGAN LARSON

22 TO EACH HIS OWN

DVR owners, watching what they want, when they want, could change the face of TV programming.

BY MEGAN LARSON

Cover illustration by Seymour Chwast

Discovery Channel Goes

**#1 Ad-Supported Cable Network
in Primetime¹**

**#1 in Primetime Growth
above Comedy, VH1, ESPN and History²**

**3 of the top 5 Primetime
Programs in Delivery³**

1. Source: Nielsen Media Research, 1Q04 (12/29/03-3/28/04), M18-34 (000), Prime M-Su 8-11P.

2. Source: Nielsen Media Research, 1Q04 (12/29/03-3/28/04) vs. 1Q03 (12/30/02-3/30/03), Ranked among top 15 ad-supported cable networks based on M18-34 (000), Prime M-Su 8-11P.

3. Source: Nielsen Media Research, 1Q04 (12/29/03-3/28/04), M18-34 (000), Prime M-Su 8-11P. Excludes specials and programs with <6 telecasts.
Competitive rankings based on ad-supported cable networks. Subject to qualifications available upon request.

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Cable
'04

Carrying on

Cable is squaring off against the broadcast nets over must-carry laws, and the FCC is trying to work out a plan. **By Todd Shields**



IN OCTOBER 1996, a lawyer stood in the marbled chamber of the U.S. Supreme Court and told justices that broadcasters have no right to space on cable systems.

The scene is likely to be repeated in the next few years, as the cable industry continues its perennial jousting with its rival and business partner, the broadcast industry. The question before the Supreme Court that day in 1996—whether cable must carry programming offered by broadcasters—remains the top regulatory issue facing the industry.

A host of other issues claim attention, too. Congressional disquiet with ever-increasing cable rates is leading some lawmakers to call for à la carte pricing that lets consumers pick which programs they buy, rather than being faced with bundled programs, or tiers. Cable-industry officials say the proposal would raise prices while weakening or killing less-popular programs. The recent indecency debate, too, shows signs of drawing in cable, as some lawmakers want it subjected to the same indecency regulations that restrict broadcast fare.

Other issues are less incendiary but nonetheless important. Federal regulators are deciding, albeit at a leisurely pace, whether to restore court-vacated limits on the size of multiple-system cable operators, or MSOs. And cable operators, anticipating that high-speed Internet may become a

dominant conduit for video programming and other services, are fighting a government mandate that they open to all Internet service providers the \$75 billion digital pipeline into homes that they have constructed with private money over the past decade.

But of all the challenges facing the industry, the argument over cable carriage of broadcast fare is drawing the most attention. That's partly because the issue has been hard fought for many years, and the Federal Communications Commission has signaled its intention to decide the issue soon. It's also because the argument is over a fundamental question: who may control what fare cable can offer to its customers.

"This is probably the issue of highest importance in terms of the future of the industry," said Brian Dietz, a spokesman for the National Cable & Telecommunications Association, the trade group that takes a lead in regulatory affairs. The debate concerns broadcasters' rights to demand their signal be carried by cable operators. The Supreme Court sided with the broadcasters in a 5-4 decision after the 1996 arguments (the case, brought by Turner Broadcasting System against the FCC, was decided in March 1997). Now the argument is over how to apply those must-carry rights once the nation's television industry moves from its traditional analog broadcasts to digital service. The transition has a target date of Jan. 1, 2007, which few expect to be met. The FCC is devising a plan to accomplish the transition by 2009, but further delay is possible.

Whatever the timing, broadcasters, cable operators and other industry participants are all moving ahead under the assumption that their future will be digital. And broadcasters have noticed they have options. They can use the digital bandwidth allotted to them to send one gorgeous, high-definition video stream. Or they can stuff the bandwidth with as many as six separate programs that offer less-detailed pictures more akin to the quality of today's broadcasts.

They desperately want cable to carry all six programs. They fear that without full access to the nearly 70 percent of TV households that take cable service, the new multicast services will not attract enough viewers or advertising revenue to stay alive. In a recent filing to the FCC, NBC affiliates asserted that uncertainty over carriage could strangle the multicast baby in the crib. Cable operators, they said, increasingly compete with broadcasters for advertising. "Cable operators...have both the power and the incentive to snuff out these multicast initiatives before they have the opportunity to compete for viewer attention," the affiliates said in their Jan. 8 filing.

Kathy Crawford
President, Local Broadcast
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As examples of prospective programming, the NBC affiliates mentioned a weather channel that would focus on local conditions, and channels devoted to coverage of local events such as press conferences and government meetings. Jack Sander, president/media operations for Belo Corp., pointed to his company's existing 24-hour local news service on KTVB in Boise, Idaho, as an example of the digital programming that could prosper with cable carriage—but fail without it. “Cable systems serve as gatekeepers,” Sander wrote. “Multicast programming that is distributed solely over the air to our stations' viewers can reach as little as 15 percent of the local public.”

In an interview with *Mediaweek*, Brandon Burgess, executive vp/business development for NBC, called must-carry “an important factor. When you're an advertising-only business, you invest in programming knowing it will be transported to all viewers, and you hope consumers watch it,” Burgess said. “If you don't know it will be carried, then you don't invest.”

Cable officials say broadcasters are seeking guaranteed space for programming of unproven quality. “Even a cursory

broadcasters should create “high-definition programming and other high-value digital content that consumers want” and that cable would carry because consumers demand it. Indeed, by this spring, local cable systems had negotiated with broadcasters to carry the digital signals of 88 ABC affiliates, 85 CBS affiliates and 79 NBC affiliates, according to NCTA figures. For broadcasters, such figures fall woefully short. According to the National Association of Broadcasters, cable systems carry only one-third of the digital signals broadcast by nearly 1,200 stations that are using the format.

The bitter and seemingly irreconcilable dispute will be resolved by the FCC and by courts that will field the inevitable appeal of the FCC's decision. Strangely, the agency already decided the issue once, in a ruling in January 2001 on the last day of the chairmanship of William Kennard, a Democrat. The decision held that broadcasters may not demand simultaneous carriage of digital and analog signals (so-called dual carriage) during the years-long transition to a digital system. At the same time, the commission determined that when asserting digital carriage rights, broadcasters could claim space only for their “primary video” signal.

The agency now is deciding broadcasters' request that it reconsider the 2001 ruling. Most Washington-based analysts say dual carriage is as good as dead. As for multiple must-carry, its fate hinges upon a spirited fight over the meaning of the word “primary,” as in “primary video.” Ask a cable lawyer, and the word means “one” or “single.” Ask a broadcast lawyer, and the word means main or basic, as in primary colors.

One bright spot for cable: The sole holdover from the Kennard commission is a powerful one, Chairman Michael Powell, a Republican. Powell shows no signs of changing his mind that primary means one. Replying to a question before the National Association of Broadcasters convention in Las Vegas on April 20, Powell could barely conceal his impatience with broadcasters' argument that multicast must-carry would further the free flow of information. “Let's let it freely flow—by increased regulation to make sure,” Powell said in a caustic characterization.

Cable advocates think they also might have Powell's fellow Republican commissioner, Kathleen Abernathy, on their side. But they appear to have lost Commissioner Kevin Martin, a Republican who has not hesitated to oppose Powell on other issues. Martin freely admits he believes cable and satellite viewers should be able to see what over-the-air viewers see for free.

The agency's two Democratic commissioners may be leaning toward multiple must-carry. But before moving forward, they want to determine what plans broadcasters have for serving the public interest with their expanded palette of channels. “If they just multiply more infomercials and there's more crassness and more rudeness, how does that help anybody?” asked Commissioner Jonathan Adelstein at a panel discussion April 20 at the NAB convention in Las Vegas. “You need to know up front there are more public interest obligations, before moving ahead.” His fellow Democrat, Michael Copps, expressed similar sentiments. “We have an obligation to tee up the public interest questions,” he said. —with Katy Bachman ■

Todd Shields is the Washington editor for Mediaweek.

“IF THEY JUST MULTIPLY MORE INFOMERCIALS AND THERE'S MORE CRASSNESS, HOW DOES THAT HELP ANYBODY?” JONATHAN ADELSTEIN



examination” shows the NBC affiliate group “has not developed any plans or business models for multicast programming that are economically viable and/or attractive to viewers.” Daniel Brenner, senior vp, law and regulatory policy for the NCTA, wrote in an April 20 reply filed with the FCC.

Brenner reprised themes struck by other cable-industry executives, who say they are eager to carry compelling broadcast content but reluctant to serve as a conduit for flat or uninspiring fare—including infomercials that some cable operators fear broadcasters will foist upon them in the name of multicasting. “There are dozens of nonbroadcast entities ready to compete for limited available channel space,” Brenner wrote.

Last summer NCTA president/CEO Robert Sachs spelled out some consequences of an adverse decision on must-carry. “In Chicago, for instance, where there are 17 local TV stations, cable systems could be required to carry up to 102 digital broadcast channels,” he said in an address to the NCTA's annual convention. Broadcasters contend that even such burdens upon cable systems' limited capacity are less, thanks to digital compression technologies, than the burden approved by the Supreme Court in the Turner case seven years ago. That may be true, say cable operators. But they also assert that they need whatever bandwidth they can muster to provide video-on-demand, Internet telephony and other high-end services that offer a chance for business growth as the traditional video market matures.

Sachs said rather than forcing fare upon cable systems,

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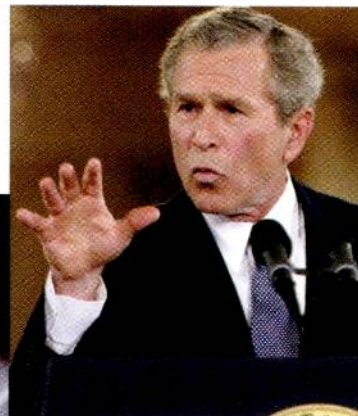
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MEET THE PRESS
Cable news networks are already fixed on the presidential candidates and issues affecting the election.

and August, when the party conventions will hopefully provide more camera-ready election-year moments.

Fortunately for cable news, though, the race between George W. Bush and John Kerry is shaping up to be a very close one. A recent Associated Press poll found Bush leading Kerry 45 percent to 44 percent; another one, done by *Newsweek*, showed Kerry ahead 50 percent to 43 percent. "Anything that makes the election more of a toss-up enhances audience interest and advertiser

interest," says John Rash, senior vp and director of broadcast negotiations at Campbell Mithun in Minneapolis.

And dramatic world news events, including America's troubles with Iraq, Afghanistan and North Korea, and the continuing threat of terrorism around the globe, virtually guarantee a hearty audience of

news junkies tuning in to cable news throughout the election season. "It's a very full news cycle right now," says CNN's Bohrman. "In addition, it's the first presidential election cycle since 9/11."

With foreign policy the dominant election issue for the first time since perhaps Vietnam, CNN, an established world brand seen in not only homes but airports and hotels around the globe, would seem to have the upper hand in becoming the go-to authority on election news. But the reality is that Fox News Channel has made enormous inroads during the last four years. In the first quarter of 2004, Fox News had 2.2 million total viewers, compared to 1.6 million for CNN and 666,000 for MSNBC, according to Nielsen Media Research.

Fox News largely has dominated election coverage too, traditionally a CNN strength. During President Bush's April 13 press conference, nearly three times as many viewers tuned in to Fox News Channel than CNN, according to Nielsen Media Research. Fox also beat out CNN the week before while covering National Security Adviser Condoleezza Rice's testimony before the commission investigated the Sept. 11 attacks. On most nights, Fox's *The O'Reilly Factor* pulls in more viewers than the other cable

Hearts and minds

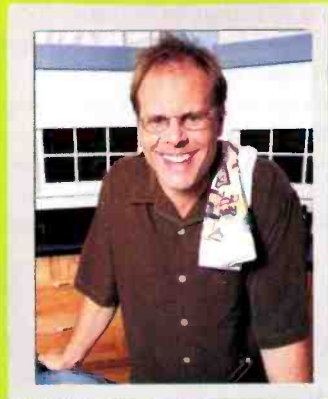
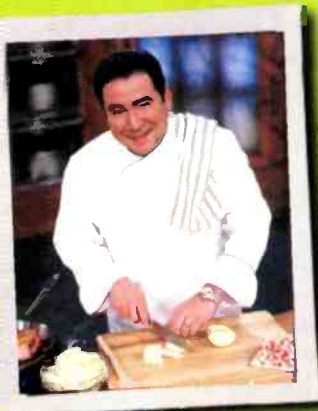
Yes, Bush and Kerry are the candidates, but the cable news networks have their own fight to win **By Alec Foege**

CNN WASHINGTON BUREAU chief David Bohrman vividly recalls a defining moment of 1984's Democratic National Convention in San Francisco. Surprisingly, it had nothing to do with the nomination of Walter Mondale as the Democratic presidential candidate or his pick of Geraldine Ferraro, the first woman to run for vice president, as his running mate.

Though the election held plenty of drama that year, Bohrman, at the time a producer for ABC's *World News Tonight*, recalls another kind of theater at the George Moscone Center that July. Walking the convention floor, he watched in awe as ABC News anchor Sam Donaldson made his entrance and all heads turned. "Sam was like a rock star," says Bohrman, 49.

Times certainly have changed. These days, the three leading cable news networks, CNN, Fox News Channel and MSNBC, provide wall-to-wall election coverage making the dominance of any one personality a near-impossibility. Of course, the major networks, CBS, NBC, ABC and Fox, are still in the game to some degree, too. To make things worse for the myriad news outlets, the presidential candidates were determined unusually earlier this year, opening up the possibility for a painfully protracted lag until late July

Eight reasons why Food Network inspires viewer purchases.



Source: 2004 Viewer Engagement Study; independent national consumer survey conducted by Simmons Market Research Bureau and sponsored by Scripps Networks; based on A25-54

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news networks combined (about 3 million).

But CNN claims its viewers are more upscale. Greg D'Alba, chief operating officer of ad sales, recently asked Nielsen to poll out-of-home viewership and light viewership, defined as people who watch fewer than 1.5 hours per day of television. The results showed CNN had 16 million out-of-home viewers, more than any other cable news network. CNN also attracts the most light television viewers, valued for their high level of education and affluence. "We have trust, credibility and an ability to cover the story better than our competitors," says D'Alba.

Phil Griffin, MSNBC's vp of prime-time programming, makes a similar claim for his own network's coverage, mentioning the advantage of having big guns from NBC like Tom Brokaw and Tim Russert at its disposal. "We have established ourselves as the best political program on

John Moody FOX NEWS



John Moody, Fox News senior vp, news editorial, was hired by Fox chief Roger Ailes in 1996 as a founding member of the fledgling news network's staff. He is a former *Time* reporter and bureau chief who was once stationed in Nicaragua. At the time of his hiring, he lamented how his magazine colleagues were "drawn ideologically, romantically, theoretically, to the side of the Sandinistas. I always was able to hold my enthusiasm."

Each morning, Moody delivers a news memo to Ailes with a list of suggested stories for the day. That memo recently got attention in journalistic circles after a former Fox News producer, Charlie Reina, posted a note on Jim Romanesko's Poyntner Institute-sponsored Web column claiming Fox's coverage was anything but "fair and balanced." According to Reina, "the roots of [Fox's] day-to-day on-air bias are actual and direct. They come in the form of an executive memo" written by John Moody, and "distributed electronically each morning, addressing what stories will be covered and, often, suggesting how they should be covered. To the newsroom personnel responsible for the channel's daytime programming, The Memo is the bible." Regardless of The Memo's influence, Moody knows what Fox News viewers want.—A.F.

cable," says Griffin. "It's going to be a long season, but we'll cover the news as it happens."

THOUGH FEW CABLE NEWS executives were willing to acknowledge that this year's election schedule demands new strategies to draw in viewers, it is clear that the cable news landscape has changed dramatically since the last election, in large part due to Fox News' rise. In recent years, Fox has made waves and bolstered ratings with brash, opinionated on-air personalities such as Bill O'Reilly, Sean Hannity and Alan Colmes, and anchor Brit Hume, and in the process changed the rules of the game.

This election season, look for CNN to push its name-brand talking heads such as Judy Woodruff, Wolf Blitzer and Anderson Cooper, to the forefront. *Crossfire* hosts

James Carville, Paul Begala, Tucker Carlson and Bob Novak will also play a key role in combating the Fox onslaught. CNN's senior executive producer of political coverage, Sam Feist, who relaunched *Crossfire* in April 2002 as a live-audience show, says the hosts of the popular debate show, which was moved from its evening slot to 4:30 P.M. last year, will make appearances on prime-time shows such as *Newsnight With Aaron Brown* and *Anderson Cooper 360°* to address election-related events. "We've always regarded debate as an important part of our political coverage," says Feist.

For MSNBC, which has suffered an identity crisis and slumping ratings in recent years, the new emphasis on personalities begins and ends with its most recognizable political powerhouse, Chris Matthews, the energetic host of *Hardball*. Though MSNBC has been bolstering its bench with more recognizable faces such as Keith Olbermann and Joe Scarborough, *Hardball* is the network's signature program. "Chris will be doing extended versions of *Hardball* for the conventions and other campaign events," says Griffin.

Meanwhile, back at Fox, the self-ascribed "fair and balanced" network is looking for ways to broaden its appeal. Marty Ryan, executive producer of Fox News' political coverage, compares his network's current approach to those of the presidential candidates. "Both sides are still doing their trial balloons, trying to see what works," says Ryan. "We're using the time to carry the day-to-day story and get ready for the conventions."

Fox's conservative bent gives it an innate advantage in an election featuring a Republican incumbent. When discussing Fox's election coverage, Ryan cites key upcoming events featuring appearances by President Bush, such as his June 5-6 trip to France to commemorate the 60th anniversary of D-Day and the G8 Summit at Sea Island, Georgia, on June 8-10, which Bush is chairing this year. Ryan views such events as opportunities for Fox to hone its deployment of what he describes as "the strongest and smartest group of personalities on any cable or broadcast network." He adds, "When you get to the Super Bowl, you want to have your strongest players in position."

FOX NEWS AND MSNBC first challenged CNN's monopoly on 24/7 news coverage back in 1996, but it took the beginning of war in Iraq in March 2003 for the cable-news competition to really heat up. Many observers expected CNN to use its hard-news expertise to clobber Fox News, which had raced ahead with its right-leaning gab formula in the relatively peaceful Chandra Levy-obsessed months that immediately preceded 9/11. All three cable news networks saw double-digit gains in last spring's upfront. But Fox remained the ratings leader even after the U.S. invaded Iraq, leaving its two competitors to battle it out for second place.

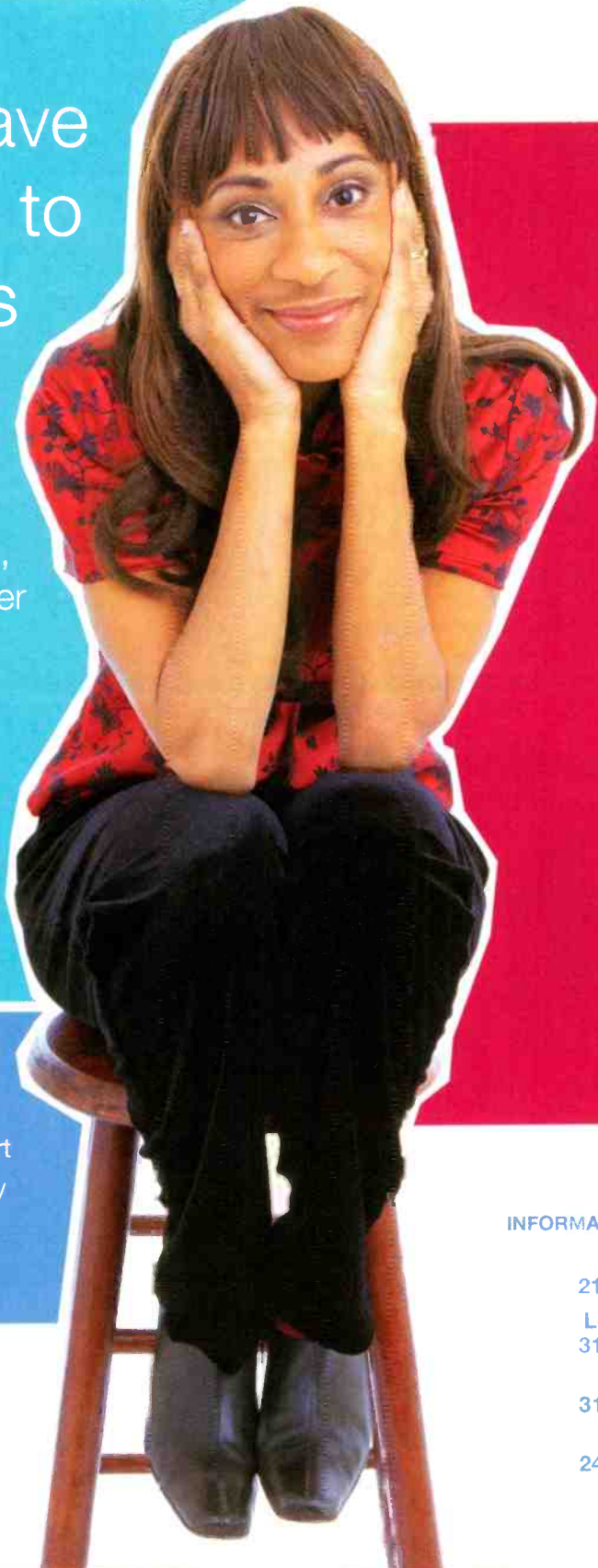
The new cable news order has forced the runners-up to become specialists. This election year, CNN is touting its we're-there-first political know-how. Its newest election initiative is a 40-foot-long bus dubbed the CNN Election Express, which travels with a full production crew and sports a TV studio. Part utilitarian ingenuity and part gimmick, it will allow regular CNN shows such as *Inside Politics* and *Crossfire* to broadcast from campaign hot spots. "We're

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putting our shows on the road and going outside the Beltway," says Sam Feist. This fall, the bus will visit swing states such as Pennsylvania, Ohio, Michigan and Florida in search of the kind of of-the-moment election stories that thwart advanced planning.

CNN is also promoting its ability to provide marketing proposals to advertisers interested in reaching a diverse

Rick Kaplan MSNBC



NBC News president Neal Shapiro handpicked Rick Kaplan, who was president of CNN in the United States from 1997 to 2000, to replace Erik Sorensen in February.

Most recently Kaplan was employed as a senior executive for ABC News, where he worked as a producer for 20 years prior to his CNN stint. While at ABC, he created *Primetime Live*, ABC's premier newsmagazine. Some observers predict more newsmagazines in MSNBC's future and a turning

away from the talking-heads format that quickly sank Sorensen hires such as Phil Donahue and Jesse Ventura.

Kaplan has drawn scorn from some conservatives for his close ties to Bill Clinton, who hired him as an adviser in 1992 when the Gennifer Flowers charges threatened his campaign for the Democratic nomination. Kaplan was fired from CNN in 2000 after AOL bought Time Warner, CNN's parent, after ratings dropped 23 percent under Kaplan's watch. But supporters say his experience as a veteran newshound should strengthen MSNBC's election-year coverage.—A.F.

Princell Hair CNN



Once the only cable news game in town, CNN now must redefine its mission. So far, though, the journalistic vision of CNN/U.S. executive vp and general manager Princell Hair—hired last October from Viacom, where he oversaw 39 regional TV stations—remains unclear.

In a January staff memo, Hair outlined a six-point plan that included a reorganization of bureaus and personnel to consolidate resources and hone the network's brand and image. The

changes were intended to free up correspondents so they could spend more time doing actual reporting and less time on live reports.

In recent months, CNN has experienced plenty of staff turnover. Veteran correspondents including Jeff Flock, Art Harris and Tom Mintier have left, and the network has hired eight new correspondents, many of them from local TV stations. Alina Cho from ABC, Joe Johns from NBC, and Ed Henry, from Washington's *Roll Call* magazine, have also joined. More recently, CNN hired four new journalists for its San Francisco, Los Angeles and Chicago bureaus to increase newsgathering efforts in those areas.

Hair's main effect so far, according to insiders, has been to better integrate CNN's newsgathering and on-air operations.—A.F.

18-54 audience across multiple platforms. "I'm out there [telling people] we're all things to all people," says Greg D'Alba, who claims that he's doing more business in the beer category than CNN has in 25 years. CNN also customizes ad bundles that include Headline News and CNN.com. During breaking news events, D'Alba claims, CNN delivers more young viewers than the market leader. "Fox is essentially just one program—it doesn't provide dimension."

AS for MSNBC, the net knows it can't hope to match the breadth of CNN or the ideological muscle of Fox. So the underdog news network is focusing on the media-savvy younger viewers it says it already attracts with the youngest demo in cable news. In the months before Election Day, for example, MSNBC expects to devote many more hours to dissecting campaign ads than its competitors. "We want to own looking at ads," says Phil Griffin.

MSNBC also prides itself on having started its election coverage earlier than most, just days after California's gubernatorial recall. On October 13 it launched *Hardball: Battle for the White House*, a series of roundtable discussions at Harvard with the Democratic contenders.

MSNBC also has something its competitors can't beat: The strength of a major broadcast network behind it. Jim Hoffman, senior vice president of sales for NBC News properties, says 99 percent of his clients buy ads across all the NBC properties. "When you're selling election-type packages," says Hoffman, "NBC can deliver ratings the other cable news networks can't."

IRONICALLY, THE DEMOCRATIC CONVENTION, in Boston on July 27-29, and the Republican Convention, scheduled for Aug. 30-Sept. 2 in New York, traditional flash points for election-year drama, are playing a secondary role. Due to declining viewership, the broadcast networks have pared down their coverage from the customary four days to three, ceding the territory to the cable news networks.

But CNN anchor Wolf Blitzer points out that even the conventions will be suffused with overtones of world news events and political symbolism this year.

In the days before the Democratic Convention, the 9/11 commission will release its book-length final report, which will draw conclusions about the Bush administration's culpability in the 2001 terrorist attacks. The Republican Convention is conveniently timed to coincide with the lead-up to the third anniversary of the attacks. "It's the first time in a long time when national security and war and peace are issues in a presidential election," says Blitzer, who will report live from both conventions. "If relevant news happens, we will certainly break away from the conventions to cover it."

As for the race to see who can draw the best ratings with its election coverage, Blitzer says he is encouraged by the need to excel in a cluttered marketplace. "I love competition," he says. "I play tennis, and when I'm playing against someone who isn't as good as me, my game deteriorates. A better player makes me run much harder." ■

Alec Foegle is a freelance writer who often covers television for Mediaweek.

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Cable
'04

Growing pains

Mid-tier cable networks poised for gains look for their breakout hit

By Eric Schmuckler



MAKING BIG STRIDES
Outdoor Life Network's airing of the Tour de France last year gained the network viewers.

You'll never get huge ratings [from the mid-tier nets], but most of them are viable alternatives for our media spending. They all make sense for somebody. And they're all one hit away from getting on the map."

The good news for advertisers and their media agencies is that mid-tier nets are usually "malleable and tractable," says one veteran buyer. "If you have new money, you can establish a low base. They're great for negotiations, giving you price leverage with the bigger guys. They're usually extremely targeted, they look good on a buy, they're eager to please in terms of bells and whistles, and they're a lower out-of-pocket cost."

The bad news is that audiences are often microscopic. For that reason, John Rash, senior vp/director of broadcast negotiation at Campbell Mithun, is not ready to hand over a blank check just yet. "To the degree that their pricing reflects their ratings reality," he says, "they can and indeed may benefit." The mid-tier nets trot out research showing strong concentrations in target demographics, longer length of stay

and high viewer interest in their channels. "It's what they've got to sell," Butchen says, "but nothing can overcome the fact that they're a 0.1 rating instead of a 0.4."

Relative lack of distribution is not such a problem these days, as everyone learns to live with smaller numbers. "A lot of clients won't consider a 30 million-home network," says Butchen, "but as broadcast ratings go down, that threshold evolves. Clients drop that 'It's got to be in half the country' criterion, and if a show is just perfect for their brand, all rules go out the window."

Mid-tier nets try to price themselves in comparison to an established cable competitor. "If you're a Speed Channel, you say, 'Give us some of your ESPN money and we'll give you a deal,'" according to one buyer, who figures mid-tier nets receive about 80 percent of the top tier's CPM, though the gap could be wider for general-entertainment nets. Stand-alone networks such as GSN, Hallmark and Oxygen are at a relative disadvantage to, say, a Viacom-owned network that gets to see all the market action. Smaller siblings such as MTV2 or ESPN Classic are easily packaged with their more expensive big broth- (continued on page 17)

WHICH CABLE NETWORK is next in line to ascend to the grown-up table?

More than 30 basic cable networks have reached the promised land of 84 million U.S. homes, most of them now household names and cash cows. Bubbling under this top tier is a stratum of medium-sized networks, defined here as between roughly 40-60 million homes. From this unruly class of overachievers and wannabes will come the next generation of cable biggies. Every network in this set will grind out more subscribers, though few will reach the full monty of 84 million. Breaking through to viewers, advertisers and cable operators becomes more and more a game of finding that distinctive hit, of upgrading and refining the schedule, of feeding the brand.

In the coming upfront, the big shots of basic will bang on the table for a heftier slice of the advertising pie. They may well get it—and, if so, the mid-tier class will share in the spoils, say media agency execs. "If there is a shift of money to cable," says Peter Butchen, senior vp and group director at Initiative Media, "that's good for every cable network, because you have the chance to write more dollars.

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*Source: Nielsen Media Research, Marketbreaks, 9/1/03-2/15/04. Based on Nick total day (M-Th 630a-9p, Fr 630a-10p, Sa 6a-10p, Su 6a-9p) vs. all ad-supported cable networks' total day definition, AA(000), P18-49 with Kids under 12. **Source: Nielsen Media Research, Marketbreaks, 9/1/03-2/15/04, Nick Jr. daytime (M-F 9a-2p) vs. all ad-supported cable networks daytime (M-F 9a-4p) and prime time (M-Su 8p-11p) AA(000), W18-49 with Kids under 12. ©2004 Viacom International Inc. All Rights Reserved.

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And it looks like momentum is in our favor. Coming off the Sunday Stew ranking #1 among P12-24 in 2003,* the 10 Spot has already reached its highest ratings in channel history in Q104.**



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GET IT



A close-up photograph of a human hand, palm facing up, resting on a dark wood-grain surface. The hand is the central focus, with fingers slightly spread. On the palm, the words "WANT THE ANSWERS?" are written in a bold, black, sans-serif font, slanted slightly upwards from left to right. The background is a dark, textured wood grain.

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*Source: Nielsen Media Research, 3Q'03-4Q'03 Prime, M-Su 8P-11P CMDY Median Age: 30, CMDY Median Inc.: \$57,340. Excludes networks with <50 million subs. Excludes kids' networks. Subject to qualifications made available upon request.

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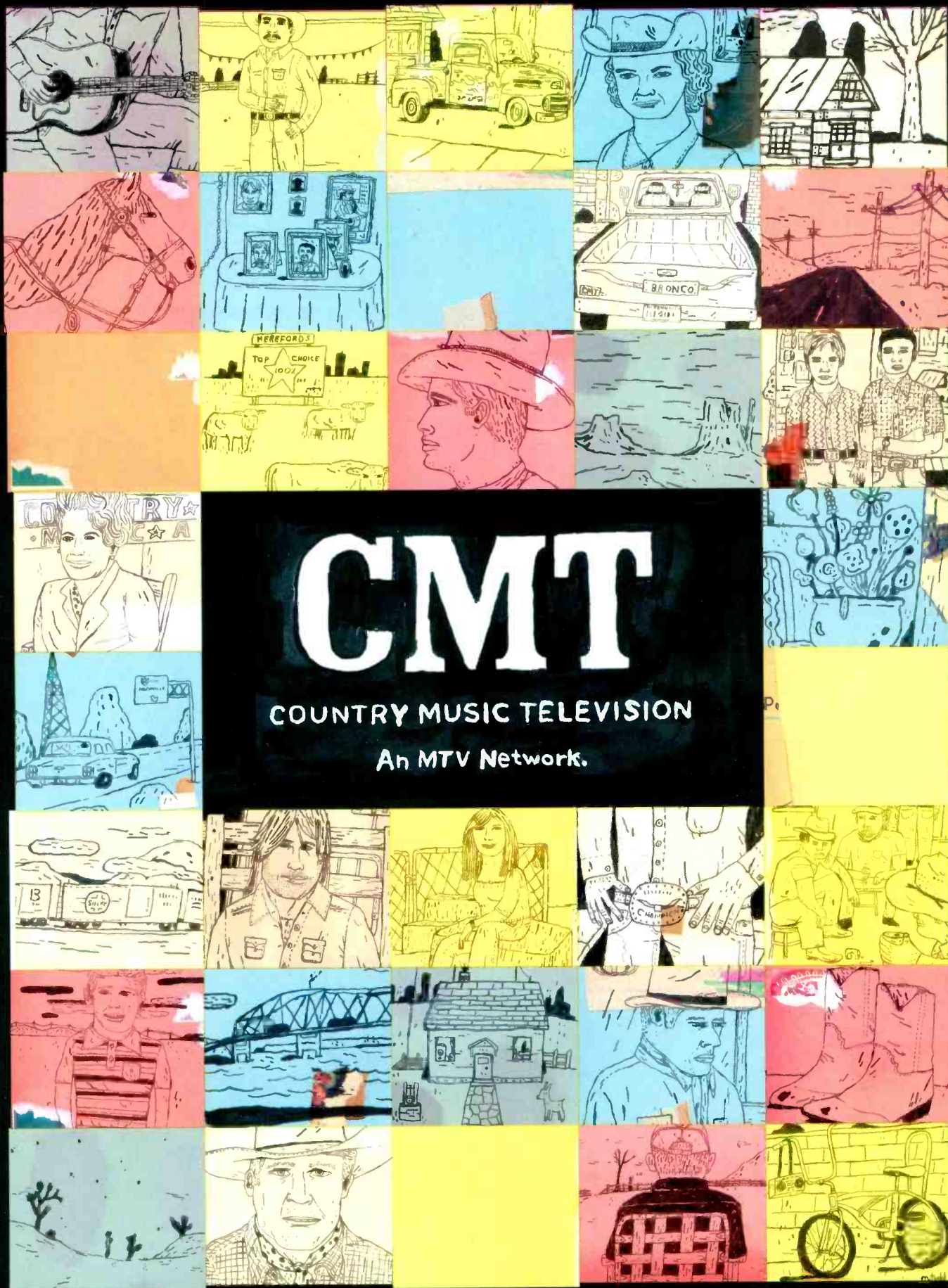


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Spike TV had its highest rated quarter ever.

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NEARLY 25 MILLION PEOPLE TUNED IN TO SEE



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Source: Nielsen Media Research, 3/17/04-3/28/04, 24.6 million claim based on P2+ Reach (000) for all TV Land Awards Show telecasts in NAN & TVL via NPower. Subject to qualifications made available upon request.

MTV NETWORKS

OUR CONSUMER CONNECTION
IS YOUR ADVERTISING ADVANTAGE.



(continued from page 16) ers—especially in a seller's market. "When buyers are desperate to get a percentage point off their CPM, they'll say, 'OK, give us some Discovery Health,'" acknowledges this buyer.

MEDIA SPECIALISTS are sanguine about the prospects of these nets, expecting further growth and success from the group overall. That said, nothing here looks like a slam-dunk breakout. The networks most often credited with a frisson of ratings momentum or buzz are Hallmark, Oxygen and Lifetime Movie Network. GSN and National Geographic are in fascinating transition, as is Tech TV, further down the food chain. But everyone's got a story—invariably, in cable, a happy one.

Hallmark has made the greatest ratings strides of any mid-tier network, rising more than 50 percent in households in each of the last two years. In recent months it has cracked the top 10 cable networks on a total day basis, thanks primarily to the evergreen *M*A*S*H*, airing four hours on weekdays, with *Touched By an Angel* anchoring prime time at 8. Monthly original movies such as *Just Desserts* with Lauren Holly have made some noise, while chestnuts such as *Bonanza* and *Perry Mason* round out the daily schedule. Not surprisingly, Hallmark tends to skew quite old, though demo ratings have risen and average age has dropped. Competitors cite its older profile and relative lack of original programming in questioning whether the channel can truly become one of the elite, but advertisers are happy. "It's a real wide network, a viable alternative for the clients who buy TBS and USA," says Butchen. Hallmark declined to participate in this story because it eschews the mid-tier label.

Near the top of the heap in number of subscribers are three sports-related services, Speed Channel, Golf Channel and Outdoor Life Network. Speed, a unit of Fox Cable,

niche." But analysts warn that this could be Armstrong's last hurrah, and there are plenty of extreme sports on the dial.

"The demo we deliver is very unique and very prime," says Golf Channel president Dave Manougian. Top-rated, naturally, are tournaments; there's also news, how-to (Monday nights, after a hard weekend on the links), talk shows, biographies and the like. While Golf doesn't receive daily ratings, its monthly prime-time average hovers at 0.1. "Our advertisers buy us to be in front of this audience on an ongoing basis," Manougian says. Young male numbers are surprisingly good, with an average age of 48, belying golf's old-guys-in-plaid-pants image. "We're not selling prime rating points," he adds. "We want it always to be niche—not tiny, just not mass."

While these male-oriented networks are strictly targeted,



GOOD BET After missing out on poker, GSN didn't take any chances, adding *World Series of Blackjack* to its schedule.

“YOU’LL NEVER GET HUGE RATINGS, BUT MOST OF [THE MID-TIER NETS] ARE VIABLE ALTERNATIVES FOR OUR MEDIA SPENDING.” PETER BUTCHEN, INITIATIVE MEDIA

focuses on “America’s love affair with the automobile,” says Richy Glassberg, senior vp of ad sales. The network offers a heavy dose of programming built around weekly Nascar Nextel races (airing on Fox or NBC), with qualifying races, a live Friday night pre-race show named *Trackside* and post-race commentary. It airs motorcycle, truck and Formula One racing, a weeknight live call-in show (*Wind Tunnel*) and how-tos. Overall ratings have been flat, but Glassberg points to 0.7 for Friday afternoon qualifiers. “It comes back to that passionate audience,” he says. “We own that by owning motor sports.”

Comcast’s OLN focuses on “the drama, escapism and competition of outdoor sports,” says Gavin Harvey, the net’s newly installed president. Its premier property is July’s Tour de France, boosted this year by Lance Armstrong’s pursuit of a record sixth title. Another up-and-coming sport, says Harvey, is bull-riding—recent 0.7 ratings on Sunday have been competitive with hockey on cable, he notes. The net has picked up the extreme sports competition *Gravity Games* and also offers hunting, fishing and a fish-out-of-water series named *Samurai Sportsman*. “I like our category versus a single pursuit like racing,” says Harvey. “It’s too big to be called a

the three mid-tier women’s nets are broader. After much zigging and zagging, Oxygen—long positioned as hipper than Lifetime—is developing a *Sex and the City*-type voice with sex-talker Sue Johanson and *Girls Behaving Badly*. More titillating shows are on tap, including a home-makeover series titled *Nice Package* and an original sitcom, *Good Girls Don’t*, from co-owner Carsey-Werner-Mandabach. Still, the net’s top performer is a second run of *The Ellen DeGeneres Show*. “Relatively speaking, there’s growth, but it’s coming off such a low base,” notes Rash.

Kathy Dore, president of Cablevision-owned WE (Women’s Entertainment), says her network aims to “target women’s passions and interests, and be relevant to their lives. We’ve always had the passions and interests—now we’re adding the relevance.” Consider the makeover of original series *Full Frontal Fashion* from model-centric to “a more accessible format with tips on how to create your own style. That in a nutshell is what you’ll see WE increasingly do.” She promises three to five new series later this year, starting with *Take My Kids, Please!*, a reality comedy about clueless babysitters. Meantime, the schedule leans heavily on well-worn theatricals, and many observers believe the

net's image is underdefined. "I think the identities of all three women's networks are pretty distinct," says Dore.

LMN is leaving its rivals in the ratings dust. Rick Hastings, evp of Lifetime Entertainment Services, points to a 20 percent prime-time gain in women 25-54 versus a year ago. "We're delivering to women what they want," he says. "The other networks are focused on entertaining women, but we're striking them on an emotional level as well." The channel's mix is about 25 percent theatricals, the rest made-fors, with acquisitions bolstering Lifetime's library. Decades of built-up equity in these flicks make for a nice business, but observers wonder if it constitutes a top-shelf brand. "Among women, we're already a top 10 basic-cable net in our universe," says Hastings.

Trying to lure younger audiences, the rechristened GSN is stepping away from its game-show heritage. "It's a bigger idea to be the network about games than about game shows," says president Rich Cronin, who has broadened the network's brief to include reality games (*The Mole*), video games and casino games. New shows include *Fake-A-Date* and *World Series of Blackjack*. "We kicked ourselves that we didn't have poker first," says Cronin. He touts the net's 84 hours a week of interactive play, saying it keeps his viewers involved and tuned in to commercials; Burger King used an interactive spot to test a chicken sandwich. One buyer believes GSN is forsaking a proven if older audience for a trendy and unreliable one, noting that reality and casino games are available elsewhere. "We're gradually transitioning," responds Cronin, noting that game shows still comprise 90 percent of the schedule.

National Geographic Channel, two-thirds owned by Fox, has reached nearly 50 million homes in just three years and is already profitable. Yet president Maureen Ong is pushing the channel to be younger and more dynamic. "We're talking to new enthusiasts, lifestyle people," she says. "Our brand should be daring, suspenseful, adventurous. We're not just

lions and tigers and bears." New shows include *Interpol Investigates* and *Naked Science*, the latter a CGI look at killer asteroids, aliens and other pressing matters. Ong points to double-digit ratings growth this year—recent special *Most Amazing Moments* earned the net's biggest number ever—and a decreasing median age. One buyer thinks it's a mistake to go younger and hipper when "they've built this wonderful brand by playing it straight," but Ong replies that the parent society expects the channel to contemporize the brand.

G4, now in 15 million homes, will vault to 44 million following the close of parent Comcast's purchase of Tech TV in March. The new net will combine G4's videogamer slant with the latter's technology focus. "It's all about gear, gadgets, guys and games," says Dale Hopkins, senior vp of advertising and affiliate sales. "People in TV ask, Where have all the young men gone? They're watching cable and playing videogames." G4's top performer is *G4TV.com*, a talk show with two gamer hosts who field online questions. There's also *Pulse*, a weekly news show, and *Players*, with musicians and athletes showing off their gaming chops à la *Cribs*. In advertising, "brand leaders have taken a chance on us," says Hopkins, citing Levi's, P&G, Honda and Coke, among others.

Sibling channels, too, strive to carve their own identities. Says David Cohn, general manager of all-music-video MTV2, "Our challenge is finding a distinctive voice so we can break through, and it is the voice of music." All-hip-hop *Sucker Free Sundays* is a solid draw, while indie-focused *Subterranean* garners cred. "Our audience is the 12-to-34 early adopters who are voracious about TV, videogames, the Web, fashion, anime—all things that are seamless with music culture," says Cohn. "Yes, the net is usually packaged with MTV for ad sales. "I'll take that as a compliment, but we do have to find those must-buy franchises."

ESPN Classic is pushing to become more than a repository of old games. Docu series *Sports Century* carries the torch. "No one tells better sports stories," says Crowley Sullivan, the net's director of programming and acquisitions. *Classic Big Ticket* wraps old games with commentary and anecdotes from players and coaches, much like a director's-cut DVD. And Sullivan points to the new *Cheap Seats*—wherein a couple of sports nuts screen vintage events and comment on announcers, graphics and playing styles in the style of *MST2K*—as "a perfect example of how we're expanding our programming to appeal to more viewers and advertisers." Meanwhile, ESPNEWS has added program blocks such as *The Hot List*, a sports news countdown, but Rash notes that "the ubiquity of sports-news on cable and local channels limits their ability to grow significantly."

In marked contrast to all these niche programmers is Superstation WGN, the Tribune-owned powerhouse. It's an old-fashioned, broad-based net, chock-full of sports (Chicago's Cubs, White Sox and Bulls), a 700-title movie package and sitcoms such as *Will & Grace* and *Becker*. Butchen praises WGN's "very successful, solid programming," though he wishes distribution were a bit more even. Says president Bill Shaw, "We've got a little something for everyone. You can keep a loyal viewer with the programming we have." ■

Eric Schmuckler is a contributing writer to Mediaweek.

Poised for growth

NETWORK	HOMES (IN MILLIONS)	FIRST QUARTER '04 PRIME-TIME RATING*
DISCOVERY HEALTH	52.3	0.12
ESPN CLASSIC	53.7	NA
ESPNEWS	41.1	NA
GSN	54.5	0.27
GOLF	60.0	NA
HALLMARK	58.6	0.46
LMN	41.7	0.30
MTV2	55.7	NA
NATIONAL GEO	48.3	0.11
OUTDOOR LIFE	58.9	0.11
OXYGEN	52.0	0.14
SPEED	61.2	0.13
TECH TV	43.7	NA
TOON DISNEY	45.2	0.16
WE	54.9	0.12
WGN	61.2	0.25

*Household prime-time rating based on national delivery.
 NA: Does not subscribe to daily ratings service.
 Source: Nielsen Media Research data supplied by agency contacts.

WEARS CARGO PANTS FOR CLUBBING NOT COMBAT.

Think you know the average History Channel viewer? Think again. With new high-tech originals like *The Tech Effect* and *Decisive Battles*, The History Channel is attracting a whole new breed of viewer. They're techies, gadget geeks and guys who simply care about nice pants. *WELCOME TO THE NEW GENERATION.*

The History Channel viewer is 49% more likely than the average male to spend \$1000 or more on clothing each year.*

*Source: 2003 MRI DoubleBase Base: Adults 18+



If you're looking for a cost-effective, waste-free way to reach men as part of your adult buy, don't overlook The History Channel. Men don't.



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WHERE THE PAST COMES ALIVE™

FACT

Cable
'04

Brain gain

Billy Campbell's mission at Discovery Networks: Make programming more entertaining and find the right people to make it and sell it. He's had his share of critics, but after a year at the helm, ratings have soared, revenue is up and Discovery is riding high. By Megan Larson

THIS TIME LAST YEAR, as Discovery Networks was entering its first upfront with Billy Campbell and Joe Abruzzese at the helm, a noticeable tension ran through the executive ranks of the company. Things are changing around here, they nervously thought. For one, the upfront presentations were far more lavish affairs than they'd ever been, with on-air talent like Paige Davis of *Trading Spaces* paraded on stage and given star treatment seemingly unfit for a company built on natural-history documentaries and scientific exploration. The programming being hawked seemed almost heretical: Dinosaurs and sharks were being swapped out for biker dudes wielding torque wrenches. Even the networks' iconic tagline, "Explore Your World," was replaced by the far less noble "Entertain Your Brain." It felt more Spicoli than Smithsonian.

"That's a tough one for a lot of people—like the end of an era," conceded one employee at the time when asked about the new tagline. The competition was more blunt: "If [Discovery founder and chairman] John Hendricks were dead, he'd be rolling in his grave," said one executive.

A year later, no one's doubting anymore. As it revs up for its 20th birthday celebration in 2005, the Discovery Channel is experiencing some of its best and most consistent ratings ever. The biker types—otherwise known as the Teutuls and Jesse James—have become bona-fide celebrities and their shows, *American Chopper* and *Monster Garage*, respectively, have succeeded in attracting the very elusive—and highly desirable—young male audience to Discovery on Monday nights. TLC, still riding on the *Trading Spaces* high, is a top 10 net-

work among key demographics; Travel Channel is up double digits in audience delivery across the board. And the myriad digital channels—Wings, Science and Home, to name a few—which had been floating untended in the digital void, now have clear programming missions and dedicated executives to see them through.

No one could be happier than Hendricks himself, who, by the way, had a lot to do with that tagline change. "I was part of that decision," says Hendricks, graciously chuckling at the notion that he would be rolling in his grave. "You use the word 'learn' and it turns people off. I wanted to create an environment where people would be stimulated but also entertained."

Bringing on Campbell to be president of the Discovery Networks group was key to that progression, adds Hendricks. "Three years ago, I became convinced that TV was going through a significant revolution. And I wanted someone like Billy who could help us develop and leverage our core properties but also build up our digital offerings...I'm very pleased."

It's never easy being the new guy, the agent of change. No one knows this better than Campbell, who describes his first days as being a stranger in a strange land. "I felt like Gulliver walking down the hall," he says with a smile. "All these Lilliputians were peering out at me from behind their office doors."

His new colleagues no doubt looked upon him with curiosity, and a little bit of fear. Taking on the 14 Discovery Networks—which generate \$2 billion in total revenue—is no small task, and Campbell, 43, was a relative unknown in the cable

PHOTOGRAPHY BY DOUGLAS WOODS

NEW ERA

Former CBS colleagues Campbell (r.), and president of ad sales Abruzzese have amped up programming and Discovery Networks.



industry. He had built his career in broadcast television, developing hits like *ER* and *Everybody Loves Raymond*. His only taste of the documentary programming that is Discovery's signature was working on HBO's *Project Greenlight* while serving as head of Miramax Television, his last job before Discovery. "We were looking for a creative person and an innovative person, not necessarily a cable person," says Judith McHale, president/COO of parent Discovery Communications. "I thought it might be too much for one person, with 14 channels, ad sales, marketing and affiliate sales, but I have to give him credit."

Campbell was cautious not to start shaking things up right away in terms of personnel, but he had a vision for the company and was eager to see it through, which more than a few longtime employees probably found off-putting. "I wanted to pick up the pace, be more competitive," Campbell explains. "There is unlimited potential for these networks—I felt that then and I still feel that." He has tried to energize the group by engendering competition between the channels, but he has also improved communication, his colleagues say. Everything is shared. A marketing concept for Discovery can come from an Animal Planet executive and a marketing executive can pitch a programming idea. "There is no territoriality here—ideas can come from anybody and any-

where," Campbell says.

Though he is reluctant to use the word complacent, it's no secret that the pre-Campbell Discovery Networks group had become...sleepy. The company had been a cable giant for years, with Discovery Channel consistently ranking as the No. 1 cable network most important to consumers, according to Beta Research Corp. Being on top for so long, it's natural to get comfortable. "People didn't respond to pitches for two months—they felt like they didn't have to," Campbell says with a note of incredulosity. "Not only is that not honorable business, but if we don't talk to them, they will take their ideas elsewhere—we are competing with everyone."

"As a culture under Billy, we are more aggressive," agrees Roger Marmet, who was promoted to senior vp and general manager of TLC under Campbell in February 2003. "His expectations are for people not to accept the status quo—it is a great enhancement."

CAMPBELL'S L.A. BACKGROUND and constant talk about the importance of star power, led some people inside and outside the company, to believe he was going to Hollywood-ize Discovery. Funny thing is, Campbell is anything but your classic, slick, entertainment suit. Though he may want to improve the wattage and volume of Discovery's

The most flattered

BBC America revolutionizes television in the U.S.

THE OFFICE IS ONE IN A LONG LINE OF SMART, sophisticated British comedies to have crossed the Atlantic over the past half century. But for BBC America, it's the show that put the emerging cable network on the map.

A workplace comedy set in a paper manufacturing company outside of London, the show took home two trophies at the Golden Globe Awards earlier this year: one for best comedy series and another for best comedy actor (awarded to star and co-creator Ricky Gervais). Following those wins, all eyes have focused on BBC America as a destination for cutting-edge programming.

In fact, BBC America has stirred so much buzz throughout the television industry that CEO Paul Lee, a U.K. native, was tapped last month to become president of ABC Family, following Disney's corporate restructuring of its broadcast and cable properties. In Lee's absence, Jo Petherbridge, BBC A's senior vp of strategy and communications, was named acting COO.

In the wake of *The Office*'s success—and prior to Lee's exit—BBC A already had begun an aggressive push into new programming. "We decided early on that we didn't want to be your grandfather's BBC," Lee said before his move to ABC Family was announced. "We wanted to be younger, cooler and more



relevant. Which is why we've put less emphasis on period dramas and more on groundbreaking, quality programming."

Distributed by Discovery Networks, BBC A premiered the highly acclaimed political drama *State of Play* last month. It

A SHOT OF SCOTCH: The Scottish sketch-comedy show *Velvet Soup* recently launched on BBC America.

newfound star power, his personal values are more complementary to Discovery's home-grown, independent, family brand than any of his earlier gigs in L.A. Ambitious and smart, Campbell is also a gentleman. A true Southern boy, reared in Greenville, S.C., Campbell seeks the comfort of khakis and slip-on loafers, sweet tea and fried chicken. (He is so devastated that the Carolina Kitchen near Discovery's headquarters burned down that he is raising funds to help the place rebuild.) He'll hold your coat and the door in a way that makes you think everyone still does this. "When he came in two years ago to interview, his competitiveness was appealing, but I was really impressed by his fundamental decency, a rare thing in this business," says McHale.

But yes, he wants more celebrities and household names populating his networks. "It's part of entertainment," says Campbell. "A good show is 60-70 percent talent. The rest is marketing." The only "star" at Discovery two years ago was Steve Irwin, a.k.a. The Crocodile Hunter. Since then, a handful of personalities have emerged as full-blown TV stars. In addition to the Teutuls, Jesse James and Paige Davis, *TLC* carpenter and resident hunk Ty Pennington also claims celeb status, as well as *While You Were Out's* Chayse Dacoda and Evan Farmer. The next big star,



ALL IN THE FAMILY
The Teutuls practice the art of motorcycle maintenance in *American Chopper*.

according to Campbell, is Austin Stevens, a Namibian herpetologist who charms reptiles and sharks in Animal Planet's upcoming *Austin Stevens: Snakemaster*.

However, more important than all of them, at least in Campbell's heart, is primatologist Jane Goodall, whom he convinced to work with Animal Planet last year. "Billy had a clear vision of what he wanted to accomplish when he got there," says his friend and

network

also launched the romantic thriller *Take Me*, the detective series *Murphy's Law*, and the Scottish sketch-comedy show *Velvet Soup*. Later this summer, it premieres the mystery series *Messiah*, which, in terms of quality, Lee noted, "is up there with *Prime Suspect*." On the nonfiction side, the cable net recently launched the real estate property show *Location, Location, Location*; and it is preparing to launch its latest makeover show *Design Rules* later this month.

Reaching 38 million homes, BBC A's impact on American programming seems to outweigh its limited reach. After all, if imitation is the sincerest form of flattery, then BBC A "is the most flattered cable network out there," said Kathryn Thomas, associate director of Starcom Entertainment. Thomas noted that Discovery's *TLC* remade BBC A's makeover show *Changing Rooms* as *Trading Spaces* and recast *What Not to Wear* with American hosts. Meanwhile, *Cash in the Attic* became HGTV's *Collector Inspector*. And even though NBC botched its remake of *Coupling* this season, it still plans to take a stab at *The Office*.

Despite the cable net's wide-ranging influence, execs there acknowledge it still faces some obstacles to future growth. Regional accents of actors on programs ranging from *State of Play* to *Velvet Soup* may sound incomprehensible at times to American viewers, while the Anglo-centric nature of series like the U.K.-set *Location, Location, Location* can prove alienating.

Dave Bernath, BBC A's programming vp—and an American—says such issues "are always a consideration, but the overall quality of these shows has caused most of them to work."

In an effort to make those shows work even better, the network also has begun to package more effectively, creating prime-time programming blocks seven nights a week. In addition to Mystery Mondays and Makeover Tuesdays, Wednesdays have been reserved for broadly appealing comedies in the vein of *Keeping Up Appearances*, while Thursdays will feature offbeat comedies, including the recently launched Canadian comedy *Trailer Park Boys*. As of July, Friday will be dubbed Retro Night, featuring classic UK series such as *The Saint*. Saturdays will revolve around property shows like *Location, Location, Location*, and Sundays remains a showcase night, housing acclaimed programs like *State of Play* and this month's launch of the sketch-comedy show *Little Britain*.

Like most cable execs, Lee tips his hat to HBO for driving viewers toward edgy content. "You have to give them credit for identifying a sophisticated, upscale audience that wanted to take risks, that was getting bored of the broadcast networks and their cookie-cutter shows, and that didn't want a laugh track," he says. "Behind the success of HBO have come sophisticated cable channels. And if we had launched 15 years ago rather than 5, I don't think we would have been as successful as we are now." —A.J. Frutkin



college roommate Dr. Mehmet Oz, host of Discovery Health Channel's *Second Opinion With Dr. Oz*. "He wanted to elevate the type of personalities on the network, punch it up and make it more big-time."

IT IS VERY IMPORTANT to Campbell that the right person is in the right job. True, a number of executives have left the company under his watch, but he has promoted some deserving people, including Rick Rodriguez to executive vp/general manager of Travel Channel, and Steve Burns to senior vp/gm of Discovery Science. He has also brought in new talent, including ex-CNN producer Vivian Schiller as senior vp/gm of Discovery Times and Sony veteran Ken Dice as executive vp of marketing of Discovery Networks.

But there's one management appointment that stands out from all others because it has contributed significantly to Discovery Networks' bottom line. Shortly after he arrived at Discovery, Campbell went after CBS' longtime sales chief Joe Abruzzese, who, with his tailored suits, snazzy ties and fast talk, is one of the best-known and easily recognized stars of the ad-sales business. "Discovery had to change, and the only way to do it was to get Joe," Campbell says.

Though it meant replacing some Discovery veterans, Abruzzese was named president of advertising sales for the 14 channels, including BBC America. In turn, Abruzzese brought in two former CBS colleagues: Scott McGraw as executive vp of ad sales and Beth Rockwood as senior vp of market resources. Together, Abruzzese and his team have brought in new advertisers, including Taco Bell, Valvoline and \$15 million in beer business. They have increased the number of integrated marketing deals—"solutions" deals in Discovery parlance—and grown revenue across all the nets.

"Immediately following this last upfront, I said, 'I need to do more business with these guys'—and I already do a lot of business with them," says John Muszynski, managing director of investment and operations for Starcom. "Abruzzese is the consummate partner. He doesn't just sell you a plan, but he finds a way to help you that also helps him."

Watching them tag-team an upfront presentation together, it is clear that Campbell and Abruzzese are partners in building Discovery. They are friends from when they worked together at CBS, which was one of the reasons Campbell

DOG DAYS Animal Planet gets a leg up on the competition with both tame and wild animal programs.

hired him. They trust each other. "If I was going to go to Discovery, I told him that we needed to start working on the upfront right away," says Abruzzese. "I want to compete with the networks—not just USA, but with ABC."

He has already made some inroads. Discovery Channel's net revenue is expected to grow to \$329 million in 2004 from \$289 million last year, according to Kagan World Media. TLC, the biggest revenue generator, will grow to an estimated \$338 million from \$294 million; Animal Planet will grow to \$90 million from \$81 million, and Travel Channel will grow to \$76 million from \$61 million. Even Discovery Health, which has officially outgrown its emerging-net status with 52.5 million subs, is expected to grow to \$29 million from \$18 million. That's \$119 million in added revenue.

"Two years ago, Discovery had 15 percent of ABC's Monday-night rating—now we are at 40 percent," Abruzzese says. "I can sell *American Chopper* five times over and I can sell TLC like that. The idea of bigness doesn't work anymore."

It is difficult to determine what prices the nets' inventory will grab during the upfront this year, but last year Discovery Channel grew its cost-per-thousand rates about 7.2 percent to fetch an estimated 24-hour CPM average of \$7.34, according to Kagan. And with Discovery's current reputation in the marketplace as one of the most competent sales outfits, pricing and revenue is expected to increase across the networks.

"Not every client can go as deep [with integrated marketing and cross-platform deals], but Discovery maximizes the relationship by offering deals with many arms and legs that go beyond straight media—on-air, online, branded in-store media and talent," says Tim Spengler, Initiative's executive vp and head of national broadcast. But it's as much the personality of its executives as their strategic thinking that will help Discovery attract more ad dollars this year, adds Spengler. "It's Abruzzese's actual style that puts him at the top. [He and his team] are easy to work with—they listen, understand both sides, and are not confrontational."

AS A PROGRAMMER, Campbell puts together a development slate the way some people cook. He experiments with a variety of concepts, adding a little bit of this and a dash of that, then lets it simmer until something happens. "He has created an environment where you throw a bunch of spaghetti at the wall and see what sticks," says McHale.

Campbell wants to create more signature series at the networks by stretching the definition of each network brand while keeping Discovery's core programming mission in sight. Last year, he grew ratings on Discovery's *American Chopper* and *Monster* without eclipsing viewership of classic documentary specials *Walking With Cavemen* and *Nefertiti Resurrected*. TLC had some success with *While You Were Out* and *What Not to Wear*, while Travel Channel had a sleeper hit in *The World Poker Tour*.

So what's next? Often the approach is to see if one good show can beget another. *Chopper* was a risk that worked, so Discovery is pushing *American Hot Rod*, which is similar to *Chopper* except that host Boyd Cottingham works on cars and is cooler under fire than the Teutuls.

The spinoff is a familiar concept, especially on TLC, which has spawned endless *Trading Spaces* extensions, from

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Trading *Space Family* to the upcoming *Trading Spaces Goes Medieval*. Is the appeal of home decorating shows waning? TLC's Marmet thinks not. "We do not see a dilution in viewers' desire to watch these types of shows, but we are aggressively developing outside of that space," he says. The ratings bear him out: The April 25 finale of *Trading Spaces: Home Free* delivered a 3.3 household rating, a 371 percent gain over the timeslot a year before.

What's next? A remake of British series *Faking It*, in which people try out a new job for 30 days and attempt to convince a panel of judges they actually do it for a living. One episode has a 21-year-old sheep shearer test his scissor skills—and his tolerance for gay men—in a hip L.A. hair salon.

Campbell has definitely gone one step farther than the company has ever been with *Animal Face-Off*, Tuesdays at 9 p.m. The series, which uses computer animation and biomechanics to simulate combat between two creatures that wouldn't ordinarily do battle (an elephant vs. a rhino, for

ABSOLUTELY NOT In *What Not to Wear*, bad fashion decisions are nipped in the bud.

example), has met with criticism from those who think it too violent. "With 14 channels, I should be able to have Jane Goodall on one night and then air *Animal Face-Off* the next," replies Campbell. "Who knows where the next hits are coming? A great programmer has to be passionate, and if you keep trying new things, something will hit."

Also coming up: *N.O.W.* (No Opportunity Wasted), which Campbell hopes to be the next programming juggernaut. The emotionally charged Discovery series, set to debut in the fourth quarter, gives viewers a chance to realize a fantasy, whether it's to play for a professional hockey team, eat dinner on the edge of a volcano, or audition for a Broadway show. "Billy has given me the freedom to assume risk," says Clark Bunting, Discovery Networks' exec vp. "How do we reinvent natural history? We can be smart *and* entertaining where before we were smart but not always entertaining."

THAT SAID, DISCOVERY Channel is still home to spectacular documentaries, and networks like Discovery Times seek to explain, in-depth, the "why" behind international headlines that the mainstream media no longer attempts. Though some of the regular series on the flagship network are less formal and more fun, the Discovery nets are still about "discovery." They still inform, whether it's on world culture, putting in a tile floor or the advanced stages of Alzheimer's. For example, as our society ages, Campbell sees Discovery Health as a must-have informational tool. Oz is currently developing ideas for some medical anthologies as well as real-time documentaries on surgical procedures. "The idea is to provide quality programming for caregivers—the professionals as well as the mothers and the grandmothers," Oz says. "Billy cares about educating the educated—taking it one level up."

Campbell last month announced he is delegating some of his duties to Bunting. Bunting will oversee 10 of the networks, which frees Campbell up to concentrate on Discovery Channel and TLC, the company's largest networks, as well as focus on building more relationships within the creative community and with advertisers. Jane Root, controller for BBC Two, was tapped to replace Bunting as executive vp/gm of Discovery Channel. "As we move faster with strong people in place, I need to focus on macro issues—strategy, future direction, the relationships we build through Joe and with talent," Campbell says.

For an outsider, Campbell has certainly made his mark. "I hired him to help us build the organization of the future—to grow ad sales and connect with the production world," says Hendricks. Having recently decided to give up his CEO title to McHale in June, in order to spend more time on high-definition programming and other technical pursuits, Hendricks is clearly confident DCI is heading that way.

The marketplace sees it that way, too. "Obviously, the old brand has been diluted," says Starcom's Muszynski. "But with a *Trading Spaces* or a *Chopper*, Discovery has engaged the viewers. They are part of the fabric of that programming—and that is everything an advertiser wants. Billy Campbell's direct influence can be felt in that." ■

Megan Larson is a senior editor at Mediaweek, in charge of covering the cable industry.

The Discovery Networks portfolio:

■ **DISCOVERY CHANNEL:** The flagship. The network is the home of natural-history documentaries like *Blue Planet*, *Walking With Cavemen* and *Discovery Quest*, but it has also been punched up with fun series about remaking roadsters, hogs and homes, as well as *Mythbusters*. Launched in 1985; 88.6 million households

■ **TLC:** With series like *Wedding Story*, *Trading Spaces* and *While You Were Out*, TLC is "Life Unscripted," offering nonfiction programming about interpersonal relationships. Launched in 1980, but acquired by Discovery and relaunched in 1991; 87.1 million

■ **ANIMAL PLANET:** From *Crocodile Hunter* and *Pet Star* to the AKC Eukanuba National Championship dog show and *Growing Up*, Animal Planet focuses on relationships in the animal kingdom and its ties to human creatures. Launched in 1996; 84.9 million

■ **TRAVEL CHANNEL:** Takes viewers to the most popular destinations in the U.S. and abroad. Launched in 1987, but Discovery acquired 100 percent in 1997; 75 million

■ **DISCOVERY HEALTH CHANNEL:** With a mix of series and specials, Health is dedicated to wellness education via stories on medical breakthroughs, triumphs and tragedies. Launched in 1999; 52.5 million

■ Other networks include **BBC AMERICA** (see sidebar), 38.8 million households; **DISCOVERY HOME**, 35.5 million; **DISCOVERY KIDS**, 35.5 million; **DISCOVERY WINGS**, 35.5 million; **FITTV**, 35.3 million; **THE SCIENCE CHANNEL**, 34.9 million; **DISCOVERY TIMES** (a joint effort with *The New York Times*), 33.7 million households; **DISCOVERY EN ESPAÑOL**, 8.5 million; **DISCOVERY HD THEATER**, approx. 5 million

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To each his own

DVR owners, watching what they want, when they want, are changing the face of TV programming.

By Megan Larson

TIM HANLON'S WIFE ENJOYS making scrapbooks, so, just for kicks, she put the term "scrapbooking" in her TiVo profile as one of the programming genres she would like the digital video recorder to tape for her. She didn't expect much from it except the occasional HGTV program, so she was surprised when a QVC segment was recorded. She had never really watched the home shopping channel before, but one of its saleswomen was peddling a cool-looking little stamp with interchangeable magnetic letters, something she thought she could use. Though she'd never bought a thing off TV in her life, she purchased it. Later, she told her husband she would never had known the craft tool existed if it weren't for TiVo.

In effect, Mrs. Hanlon created her own on-demand niche network of all the things she likes, with the DVR hard drive acting as a channel where everything she wants is

available at any time. "By 2008, content won't be about TV anymore," says Hanlon, senior vp/director of emerging contacts for Starcom MediaVest Group. "More than a one-TV world, it will become a one-video world and media will be more than broadcast and cable but also video-on-demand and broadband and tape-delayed TV. I fully expect our conversations in the future to be about video, not television."

The industry has been clucking about this brave new world since 1999 when the digital revolution appeared to be in full swing and TiVo and other DVR (also called PVR, or personal video recorder) manufacturers started pushing their wares. Tech analysts, awed by these gadgets, bought the companies' lines and predicted the DVR would sell like hotcakes, reaching more than 40 million homes by 2004. Well, it hasn't quite played out like that. There were slightly more than 3 million homes equipped with DVRs at the end of 2003, according to the Consumer Electronics Association, but DVR penetration is growing at a faster clip than it has in previous years.

Echostar Communications' Dish Network is leading the market with its inexpensive DVR Dish Player, of which more than 1 million have been deployed. DirecTV is not far behind with 700,000 DVR subscribers, which include the TiVo and Ultimate TV service. In total, TiVo has more than 1 million DVRs out there, including stand-alone boxes. And with News Corp. Chairman Rupert Murdoch vowing to put a less-expensive DVR into every DirecTV home, cable operators, feeling the heat of the competition, are getting far more focused on incorporating DVR software into its set-top boxes and marketing the service to subscribers. With five of the top six cable operators working on it, cable's DVR penetration may surpass satellite operators by next year, according to Jupiter Research.

Comcast Communications began testing DVR service last year. By the end of this year, all of its 7.7 million digital subscribers will have DVR capabilities. Time Warner Cable launched its DVR service in 2002. By the end of last year, there were 369,000 TWC DVRs, representing 10 percent of their digital subscriber base. Charter Communications has committed to deploying 100,000 Motorola Broadband Media Centers, including high-definition, DVR and DVD

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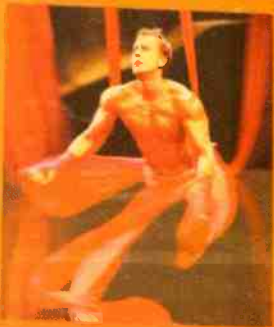
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capabilities, to a couple of its markets. Cox Communications, with more than 6 million total subscribers, has made DVR service available in 10 markets, including San Diego and Phoenix, and Cablevision is rolling out DVR services this year to its cable subscribers in New York. "Cable's involvement will drive DVR penetration," says Aditya Kishore, a media and entertainment analyst for The Yankee Group. "Consumer awareness is growing and starting to pique a lot of interest."

The Yankee Group projects that there will be an estimated 13 million DVRs in U.S. households in 2005, which represents 12 percent of all U.S. households. Morgan Stanley projects 12.3 million DVR homes and Deutsche Bank sees about 14.4 million. Traditionally the most bullish about predictions, Forrester reports that there will be almost 18 million DVR homes by the end of next year. "I don't play the numbers game anymore. All you need to know is that it is going up," says Hanlon.

With the myriad projections (*see chart below*) that have been thrown out there, it is hard to rely on numerical data—it mostly comes from manufacturers anyway—but the DVR momentum is hard to ignore when you talk to consumers. Going by the word on the street, those people who have a DVR can't imagine life without it. The churn rate of DirecTV customers who subscribe to the TiVo service is less than 0.5

year, according to TNS Media Intelligence, and such windfalls of cash are in jeopardy every time a DVR user presses the 30-second skip button on the TiVo remote control. About 50 percent to 75 percent of television commercials are skipped by consumers using DVRs, according to most reports, but programming executives don't view the proliferation of DVRs as the apocalypse anymore. "I used to be very dismissive of TiVo, but now I watch everything that has been recorded," said John Hendricks, chairman and CEO of Discovery Communications. "I think people are getting more comfortable with it."

According to a Time Warner Cable survey of its DVR subscribers, ad-zapping ranks fairly low among the reasons consumers like the service. More important is time shifting and being able to watch what you want when you want. Moreover, recent research conducted by market research firm C Cubed indicates that DVR users actually watch more TV because they can fit it into their schedule better.

In its first Commercial Viewing Report, TiVo reported that event programming, sports, news and reality shows were not tape-delayed as often and therefore had higher commercial viewing. Less-pressing programming like sitcoms were often tape-delayed and had lower commercial viewing.

Hendricks has no doubt there will be several ways people will get their content, and one of the options will be on-demand, via the DVR or otherwise. "People want to watch what they want to watch when they want to watch it. I know my family does," says Hendricks. "But we have to keep our ad revenue intact. We are in constant talks with agencies, and we will bring all of our company assets to the table." Programmers like the Discovery Networks, The Scripps Networks and ESPN have been very forward-thinking about finding marketing solutions that go beyond 30-second spots, including product integration on-air and off-channel stunts.

It is believed that the industry will better understand DVR usage when Nielsen Media Research begins to measure viewing patterns in households with the technology next year. But Starcom's Hanlon says he doesn't believe ratings will shed any light on the matter. "The question is not when people are watching, but how people are watching," he says. "The definition of reach has to change. A rating isn't the measurement of the future. Perhaps the value of content will be determined by the number of subscribers?"

As an advertising consultant, Hanlon encourages his clients to think outside the box when it comes to buying time on TV as it is defined today. For example, with the further fragmenting of audiences between DVRs, video-on-demand, TV and the Web, he says he thinks programmers and advertisers should facilitate getting the consumer what he wants to watch. Perhaps in the form of a navigational aid or a long-form commercial with content they might want? After all, TiVo can track and report the viewing habits of viewers whom marketers want to reach.

The makers of a magnetic alphabet stamp made one more sale last month because their infomercial "accidentally" got in front of a scrapbooking aficionado. No doubt there are a lot of people out there who programmed the word "car" into their TiVo profile. "TV will continue to niche," Hanlon says. "The good news and the bad news is that there will be more viewing choices." ■

DVR household-penetration projections

SOURCE	2004	2005	2006	2007
JUPITER MEDIA	9.3	20.9	33.7	45.9
YANKEE GROUP	7.8	13.0	19.1	NA
FORRESTER RESEARCH	9.6	17.8	27.4	38.9
DEUTSCHE BANK	7.4	14.4	24.0	NA
MORGAN STANLEY	6.6	12.3	20.5	32.6

NUMBERS IN MILLIONS; SOURCE: STARCOM MEDIAVEST GROUP

percent. When Time Warner Cable launched its DVR service in New York City last year, subscribers were wrapped around the block on a Saturday to get one.

The bottom line is that DVR usage is set to explode in the next few years. So, what is the impact on programmers and advertisers? Though it has been discussed again and again over the past five years, a lot of questions remain about how it will be used because there are still so few people who have the technology right now. "The TV model as we know it is stressed by this technology, but you still don't know how many, how quickly or how people will use them," points out Jack Wakshlag, head of research for Turner Broadcasting Systems. "Does TiVo make people watch more TV? Maybe, but we don't know. We don't know how much of total viewing will be time-shifted and we don't know how many commercials will be skipped."

Conventional wisdom is that the DVR device allowing consumers to fast-forward through commercials will erode the very foundation of the TV business because it relies so heavily on ad revenue. After all, the million-dollar 30-second spot helps pay for the series' \$100 million dollar cast. Advertisers spent an estimated \$54 billion in television last

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market profile

NEWSPAPERS: THE ABCs

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Fairfax County (Va.): 361,056 Households				
<i>The Washington Post</i>	158,424	203,920	43.9%	56.5%
<i>The Washington Times</i>	12,375	6,622	3.4%	1.8%
Montgomery County (Md.): 334,455 Households				
<i>The Washington Post</i>	145,885	188,208	43.6%	56.3%
<i>The Washington Times</i>	13,727	6,959	4.1%	2.1%
Prince George's County (Md.): 292,890 Households				
<i>The Washington Post</i>	88,151	149,736	30.1%	51.1%
<i>The Washington Times</i>	12,314	4,576	4.2%	1.6%
District of Columbia: 249,965 Households				
<i>The Washington Post</i>	135,098	124,759	54.0%	49.9%
<i>The Washington Times</i>	22,800	8,434	9.1%	3.4%
Prince William County (Va.): 99,134 Households				
<i>The Washington Post</i>	25,578	47,038	25.8%	47.4%
<i>Potomac News/Manassas Journal Messenger*</i>	14,507	13,539	14.6%	13.7%
<i>The Washington Times</i>	2,342	1,108	2.4%	1.1%
Frederick County (Md.): 74,055 Households				
<i>The Frederick News-Post</i>	35,968		48.6%	
<i>The Washington Post</i>	9,042	18,787	12.2%	25.4%
<i>Hagerstown Morning Herald/Daily Mail</i>	1,051	1,726	1.4%	2.3%
<i>The Washington Times</i>	958	352	1.3%	0.5%
<i>The [Baltimore] Sun</i>	828	3,101	1.1%	4.2%
Loudoun County (Va.): 65,299 Households				
<i>The Washington Post</i>	25,079	38,991	38.4%	59.7%
<i>The Washington Times</i>	2,154	1,028	3.3%	1.6%
Alexandria City (Va.): 64,232 Households				
<i>The Washington Post</i>	23,830	29,356	37.1%	45.7%
<i>The Washington Times</i>	6,036	3,022	9.4%	4.7%

*Data reflects combined daily and Sunday circulation for JOA partners *Potomac News* and *Manassas Journal Messenger*. Data is based on audited numbers published in the Audit Bureau of Circulations' Fall 2003 County Penetration Report.

(continued from page 15) Adult Contemporary WHUR-FM, is also a serious contender with a 4.5 total-day share in the fall book.

Clear Channel's Sports/Talk WTEM-AM and Sports/Talk WWRC-AM carry the Baltimore Orioles, Washington Wizards and Washington Capitals. WWRC-AM was converted to Sports/Talk at the end of the year from a CNN Headline News station. ABC's News/Talk WMAL-AM broadcasts University of Maryland football and basketball games.

The big news in sports broadcasting in the Washington market this year has been Infinity's decision to get rid of longtime Washington Redskins radio play-by-play man Frank Herzog. The National Football League team's games air on Infinity's Talk station WJFK-FM.

Herzog, who did play-by-play on Redskins games since 1979, was let go after the end of last season and replaced by Larry Michael, who has worked on Redskins broadcasts since 1996. Herzog's on-air colleagues since 1981, former Redskins players Sonny Jurgensen and Sam Huff, will remain in the broadcast booth.

Washington remains a two-newspaper town, with two major dailies, *The Washington Post* and *The Washington Times*.

The *Post*, owned by the Washington Post Co., had weekday circulation of 732,872 as of Sept. 30, 2003, a decrease of 13,851, or 1.8 percent, from the previous year, according to the Audit Bureau of Circulations. The *Post*'s Sunday circulation as of Sept. 30 was 1,029,966, a drop of 18,155 (also 1.8 percent),

from the previous period.

Post executives are pleased with the progress and advertisers' reception of the *express*, the free commuter-oriented publication the newspaper rolled out last August, according to *Post* vp/business manager Ted Lutz.

Circulation of the weekday tabloid has grown since its launch from 125,000 to 150,000, and page counts are up to 32, compared to 20 to 24 at the outset, Lutz says. The *express*, a quick-read publication that contains news highlights, entertainment listings and consumer news, is distributed at metro stations, on college campuses, and at other busy locations in the D.C. area.

The *Post* also is continuing to look for ways to improve its zoning and has been zoning more days of the week, Lutz says.

"We're like everybody else," he says. "We want to be able to reach the regional needs, as well as have a sufficiently localized presence." There also is a continued effort to work closely and carefully with *The Washington Post*'s Web site (www.washingtonpost.com) to promote the entire *Washington Post* brand, Lutz says.

The Washington Times, owned by News World Communications, the publishing arm of the Rev. Sun Myung Moon's Unification Church, had weekday circulation of 102,255 as of Sept. 30, 2003. This was an increase of 1,297, or 1.3 percent, from Sept. 30, 2002, according to ABC. The *Times*' Sunday circulation remained steady over that year, with circulation of 46,561 as of Sept. 30, a decrease of 33 percent.

The *Times* has had positive reaction from readers and advertisers to Show, the Friday arts and entertainment section that the paper rolled out in September, according to *Times* assistant managing editor Ken McIntyre. The eight-page, standalone broadsheet is aimed at a younger demographic, and includes, in addition to the usual arts and entertainment fare, more pop-culture coverage, McIntyre says. "We're really excited about the content," McIntyre says. "We think we have the arts community in town sitting up and taking notice of us again." The *Times*' Saturday Arts & Culture section, which started running the same time Show was launched, is geared more to fine arts coverage, McIntyre says.

Clear Channel remains the dominant player in outdoor advertising in the Washington market and has expanded its inventory in the area by acquiring some assets from Next-Media. Zoning regulations designed to protect national monuments and historical buildings restrict the development of traditional outdoor structures in the market. ■

editor's letter

MEDIAWEEK

News About Us

It had to happen sometime. This magazine has been very fortunate to have one of the most solid and steady staffs in the world of media trades, but change has come to us. *Mediaweek's* publisher Linda D'Adamo, who has performed brilliantly in the job since being promoted from sales director in late 2001, recently enjoyed a life-changing event—the birth of twin girls. As a result of her newfound duties, Linda will return to *Mediaweek* as a sales consultant.



FitzGerald



Cooper

Replacing her in June is Geri FitzGerald, most recently publisher of sister VNU title *Sales & Marketing Management*, which she joined in 2002. Tapping her 20-year career in publishing, which

includes stints as vp of marketing for BPA International and vp of marketing for visitor-guide company Guest Informant, FitzGerald spearheaded *Sales & Marketing Management's* model change, creating greater value for for the monthly's readers and advertisers alike. We welcome Geri's experience, her professional nature and her sharp business acumen.

Mediaweek's also made some changes on the editorial side, namely the long-overdue promotion of Jim Cooper from news editor to managing editor. Jim joined the magazine in 1998 as a senior editor covering the cable industry, and it took little time for the powers-that-be to recognize in him an acute sense of news judgment married with a rock-solid work ethic. In April 2000 he was promoted to news editor, where he took on oversight of all news coverage in the magazine. Last fall, he took over the daily editorial operation of our Web site, *Mediaweek.com*. Prior to joining *Mediaweek*, Cooper had been programming editor for *Cablevision* magazine and before that, a staff writer at *Broadcasting & Cable*. He began his journalism career at *The Courier-News*, a Gannett daily in Bridgewater, N.J.

Lastly, I've been named editor of *Mediaweek*, up from executive editor. When I joined the magazine 11 years ago, I finally found myself as a journalist, thanks to the encouragement of *Mediaweek's* founding editor Bill Gloede. I firmly believe that *Mediaweek's* approach—cover the content and follow the money—is the right way to go. And I notice the competition is starting to emulate us, by talking to more media buyers and covering the ad marketplace.

Well, you know what they say about imitation...that's fine with me.—*Michael Bürgi*



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Movers

MAGAZINES

Alan Nesbitt was promoted to the new position of senior vp of the ABC TV group, from division vp of the group... **Joe Oulvey** was promoted to senior vp of Fox Television Station Sales, from vp and director of sales in New York... **Troy McGuire** has been named executive producer of *The Daily Buzz*, the weekday-morning news show that became a joint venture between ACME Communications and Emmis Communications in January. McGuire was most recently news director of KPTV-TV, Meredith Broadcasting's Fox affiliate in Portland, Ore.... **Laverne McKinnon**, vp of drama development at CBS since 2001, was promoted to senior vp.

RESEARCH

Paul Bronstein, vp of research for Westwood One, was elected chair of the Network Radio Research Council. **Barry Feldman**, director of marketing research for American Urban Radio Networks, was named vice chair... **Brad Kelly** and **John Snyder** were promoted to vice presidents of national radio sales for Arbitron. Both formerly held the position of manager of national radio sales.

MAGAZINES

Bill Shapiro, most recently managing editor of Time Inc. Custom Publishing, will move over to the *Life* development team, his title yet to be announced... **Howard Polskin**, most recently vp of communications at Sony Corp. of America, has been named to the same post at the Magazine Publishers of America... **Marc Peruzzi** has been promoted from executive editor to editor in chief of Time4 Media's *Skiing*. Peruzzi replaces **Perkins Miller**, who was recently promoted to vp, managing director of Mountain Sports Media... **Gayle Butler**, most recently editor in chief of Meredith Corp.'s Building/Remodeling Group, has been named editorial director of the company's *Better Homes and Gardens*' Special Interest Publications, Creative Collection and Family Food Collection. **Nancy Kast** will take the helm of the Building/Remodeling Group, succeeding Butler. She had been the group's editorial manager.

media elite

EDITED BY ANNE TORPEY-KEMPH

Quicktakes



Washington Post's Downie (l.) took Times chief Barnes down memory lane at Barnes' retirement party in D.C.

ANDY BARNES WENT OUT IN STYLE as newspaper-business luminaries gathered recently at the Hay Adams Hotel in Washington to fete him on his retirement as chairman of the *St. Petersburg* (Fla.) *Times*. The event kicked off with cocktails on the roof overlooking the White House, then guests proceeded to dinner, "headlined" by Barnes' longtime colleague and friend **Len Downie**, *Washington Post* executive editor. Downie quipped about Barnes' penchant for long words, mentioned rumors of nude swimming parties at the Barnes' home, and recalled being miffed when Barnes made him assistant city editor at the *Post* back in the early '70s, which turned out to be his biggest career-fueled move. Barnes, for his part, said that the pleasure of being surrounded by friends—guests included Rena Pederson of the *Dallas Morning News*; Janet Weaver, dean of The Poynter Institute; Orage Quarles III, publisher of the *Raleigh News & Observer*; and Mr. and Mrs. Howell Raines—almost compensated for his discomfort at having to give a speech. Barnes, who's held the *Times*' top post since 1988, will turn over the reins to editor and president Paul Tash in a unique succession plan established by former *Times* president Nelson Poynter 25 years ago to keep the independent paper out of the hands of newspaper chains. Under the plan, Barnes selected Tash to succeed him upon his retirement at age 65. But Barnes will still have an important place in the newspaper biz: Columbia University last week named him chair of the

Pulitzer Prize Board... Radio personality **George Noory** has been appointed to the Honorable Order of Kentucky Colonels, though he's not quite sure how or why—an unknown listener apparently nominated him. Noory hosts the paranormal-themed nationally syndicated radio show *Coast to Coast AM*, and he has no ties to Kentucky, but then neither did other notable Kentucky Colonel Winston Churchill. The honor carries with it a responsibility to be "Kentucky's ambassador of goodwill and fellowship around the world," according to the Colonels' Web site... A group of U.S. Army reservists stationed in Iraq laid down their weapons recently to enjoy some of **Jackie Plant's** cookies. Plant, food editor for G+J's *Parents* magazine, undertook the effort as part of G+J's annual Volunteer Day, through which employees contribute to the cause of their choice. Plant got the idea when she received a letter from her daughter's teacher explaining that her only child had just been deployed to Iraq and asking for her prayers. Plant, also the mother of an only child, enlisted the help of her daughter's class to bake and write letters to the soldiers in his unit. One of the soldiers responded with a personalized letter to the students, including



Hudis: Enjoying life after Mediaweek

a picture of the soldiers with cookies in hand. For Plant, the effort put a face on the otherwise mostly distant conflict... From the news about (formerly one of) us file, **Mark Hudis** has inked a seven-figure deal with 20th Century Fox TV to create, develop and exec produce series projects. The former *Mediaweek* radio reporter and Media Elite contributor has been writing for and co-exec producing Fox's hit *That '70s Show*. The deal goes into effect a year from now, after he wraps his '70s duties. Hudis wasn't available at press time to toss off a quick quip; he was vacationing in Italy with his fiancé. Here's to you, Mark! ■

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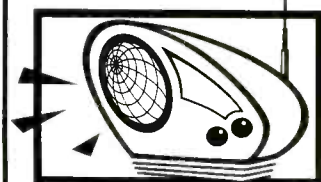
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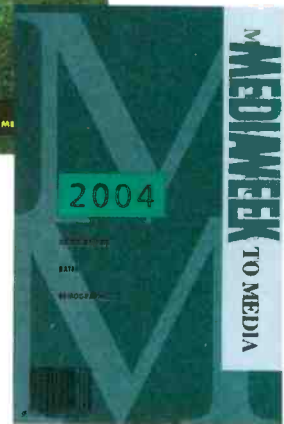
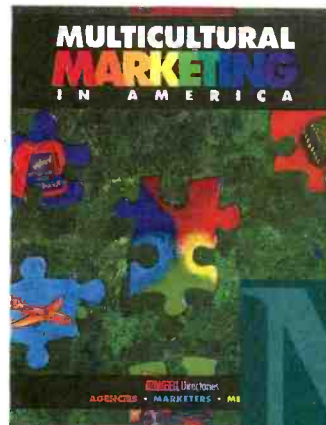
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THE **ADWEEK** DIRECTORIES 2004

Calendar

Adweek Magazines, *The Hollywood Reporter*, *Billboard*, *Sporting Goods Business* and Nielsen Media Research will host **The Next Big Idea: The Future of Branded Entertainment conference** in association with the NYU Stern School of Business, May 7 at the Sheraton New York Hotel & Towers. David Stern, commissioner of the National Basketball Association, will keynote. Contact: 888-536-8536.

Broadcast Network Upfront Week, during which the major TV networks present their fall 2004-05 prime-time schedules to media buyers, will be held in New York May 17-22, as follows: NBC, May 17, Radio City Music Hall; The WB, May 18, Madison Square Garden Arena; ABC, May 18, New Amsterdam Theater; Telemundo, May 18, Beacon Theater; Univision, May 19, Alice Tully Hall; CBS, May 19, Carnegie Hall; UPN, May 20, Theater at Madison Square Garden; Fox, May 20, City Center. Contact individual networks for more information.

The **New Generation Latino Consortium** will host its inaugural **NGLC Media, Marketing & Entertainment Conference** May 26 at the Harvard Club in New York. The conference's focus will be the New Generation Latino audience and its impact in the fields of media, marketing and entertainment. Herb Scannell, MTV Networks Group president and Nickelodeon Networks president, will keynote. Contact: 212-967-8267.

Magazine Publishers of America's Independent Magazine Advisory Group will host the first **Magazine Leadership Forum for Independent Publishers**, June 21-23 at Northwestern University in Chicago. Visit www.magazine.org/independent_publishers.

Interp will host a conference entitled **"Mid-Year 2004 Radio Symposium: Solving New Industry Variables"** June 22 at the Grand Hyatt in New York. Topics will include radio advertising's return-on-investment and growth opportunities, major business trends, pricing, and inventory, ED, and Indecency rulings. Visit www.radiosymposium.com beginning May 3.

inside media

NEWS OF THE MARKET

Comcast Gives Up on Disney

Two months after its stunning \$54 billion hostile bid for Walt Disney Co., Comcast Corp. last week took its offer off the table. Disney just isn't interested. The offer, valued last week at around \$48 billion due to fluctuations in stock price, was rejected twice by the company's board of directors. "We have always been disciplined in our approach to acquisitions. Being disciplined means knowing when it is time to walk away. That time is now," said Comcast CEO Brian Roberts, in a prepared statement. In the face of Disney's unwillingness, it was widely expected that Comcast would retract its bid. For one, thing the offer wasn't high enough for Disney, and support from Comcast shareholders was far from unanimous. Moreover, Disney's board supported CEO Michael Eisner despite widespread shareholder discontent with his management. In light of new developments, Comcast said it will proceed with its previously announced plan to buy back about \$1 billion in stock.

ESPN Study: Out-of-Home Adds 4%

There are 36.3 million people 18-plus who watch TV outside of their home in unmeasured locations such as bars, airports and college dorms, according to a recent study by the Total TV Audience Monitor, sponsored by ESPN. The study, which was conducted with more than 4,000 adults from Oct. 16, 2003, to Nov. 12, 2003, reports that the total average quarter-hour TV viewership increases 4 percent when out-of-home

viewing is included. It increases 11 percent among 18-to-34-year-olds because nearly 10 million college students watch TV in locations other than their homes. Most out-of-home viewing occurs at college in off-campus housing (29.5 percent) and in on-campus facilities (18.6 percent). Restaurants and bars account for 6.9 percent of out-of-home viewing while the rest of it occurs in hotel rooms, second homes and the workplace. Among cable networks, ESPN gets the biggest audience boost when out-of-home viewing is included, with a weekly average of 2.6 million persons 18-34. MTV is next, with 2.5 million followed by TBS (1.7 million), Comedy Central (1.2 million) and TNT (1.1 million). Among viewers 18-plus, CNN ranks in second place behind ESPN with 3.4 million. Among broadcast networks, CBS is tops with 9.8 million, followed by ABC with 9.4 million.

Liberal Radio Net CEO Steps Down

Air America Radio, the liberal radio network that launched only a month ago, is already undergoing some management changes at the top. Mark Walsh, a former AOL and National Democratic Committee executive, stepped down as CEO to take on a new role as co-founder and senior advisor, focusing on monetizing the Internet and pursuing new deals for the network. His CEO responsibilities will be shared in the interim by AAR chairman Evan Cohen and David Goodfriend, chief counsel and acting COO. Dave Logan, the former vp of operations



Johnson takes over as the net sets an April high.

Food Cooks With New Prez, Ratings

Food Network last week named a new president, Brooke Johnson, who joined the channel in 2003 as senior vp and general manager. She replaces Judy Girard, who moved on to head up Scripps Networks' Shop at Home Network, a sibling service to Food. In her new position, Johnson will be responsible for programming and new business development for Food Network, as well as managing relationships with Scripps' other lifestyle networks, HGTV, DIY and Fine Living. Food had the highest-rated April in its history, with a 0.7 prime-time household rating (a 17 percent increase), thanks in part to *Iron Chef America: Battle of the Masters*. More than 12 million viewers tuned in over the weekend of April 24 to see great chefs of the East and the West duke it out in the kitchen. In *Battle 4: Tag-Team Finale*, Bobby Flay and Masaharu Morimoto use fruits de mer to beat out Mario Batali and Hiroyuki Sakai. The episode attracted the largest audience in Food Network history with 1.3 million viewers 2-plus.



Scelsa Brings Free-Form to Sirius

Vin Scelsa, the New York radio personality who pioneered free-form radio in 1967, has joined Sirius Satellite Radio as host of *Vin Scelsa's Sunday Night Idiot's Delight*, live from 8 p.m. to midnight. Since 2001, he has been broadcasting a similar-themed show on New York public radio station WFUV-FM, playing everything from Frank Sinatra to '80s hair bands to current hits. Scelsa has spent his entire radio career on the New York airwaves, working for WBAI-FM, WABC-FM, WPLJ-FM, WXRK-FM and WNEW-FM. Separately, Sirius also signed Dennis Elsas to host its Classic Vinyl channel (featuring Classic Rock from the mid-'60s to mid-'70s), beginning May 3. Elsas, a former music director with WNEW, will host weekdays 6 a.m. to noon.

K.C. SCIELSA

He's a *Delight* to satellite.

and programming, has exited AAR. He has been replaced by Lizz Winstead, co-host of the network's morning show *Unfiltered*, who will also take on additional responsibilities as executive vp of programming. "This is a natural progression of the business cycle," said Cohen, adding that Walsh is a "startup guy." "Even with our bumps [caused by distribution- and payment-related disputes with stations leasing time to AAR] over the last couple of weeks, we've grown faster than we anticipated. By the end of May, we'll be on 26 affiliates," Cohen added. Currently AAR airs on 11 stations in markets including New York, San Francisco and Sacramento, Calif.

L.A. Talker Handel Switches Syndicators

Bill Handel, morning host on KFI-AM, Clear Channel's top-rated Talk station in Los Angeles, recently changed syndicators for his weekend show, *Handel on the Law*, which airs on 75 radio stations. Formerly syndicated by Cox Radio Syndication, *Handel on the Law* will now be distributed through Premiere Radio Networks, the programming division of Clear Channel. Broadcast Saturdays 6-9 a.m., *Handel* first aired on KFI in 1989 and went national in 1998.

Cox Radio Re-Ups Ratings Contract

Cox Radio last week extended its ratings contract with Arbitron for another five years through 2008. The pact gives Cox, the third-largest radio group, access to ratings for all of its 78 radio stations in 18 markets, including such major markets as Atlanta; Houston; Miami; San Antonio; and Tampa and Orlando, Fla. Arbitron has a few other major radio groups up for renewal, including Infinity

Broadcasting, which accounts for about 10 percent of the ratings company's annual revenue. Infinity's contract for its 183 stations expires on June 30. Last year, the Viacom-owned radio group, which was undergoing sweeping management changes at the top, was granted a one-year extension on its current contract. Clear Channel, which accounts for 21 percent of Arbitron's revenue, is due for renewal at the end of the year.

ESPN Adds Radio Show Simulcast

ESPN last week launched a live simulcast of *Mike & Mike in the Morning*, ESPN Radio's morning sports show, which airs on 256 stations. Co-hosted by Mike Greenberg and Mike Golic, the show airs weekdays 6-10 a.m. The addition of *Mike & Mike* to the ESPN lineup increases the number of live programming hours on the digital cable channel to 17. ESPN reaches 40.3 million cable subscribers.

World Pubs. to Buy Islands Titles

World Publications last week announced plans to acquire *Islands*, *Spa* and *Resorts & Great Hotels* magazines from Islands Publishing. World Publications will also own *Islands'* companion title, *Islands Weddings & Honey-moons*, along with the magazines' related Web sites. All *Islands* editorial will remain based in Santa Barbara, Calif., but the back-office operations will be integrated into World's corporate headquarters in Winter Park, Fla. World's Dave Freygang will assume the new role of group publisher of the travel division, which will include the *Islands* titles, and *Caribbean Travel & Life*, along with the water-sports titles. *Islands* publishes eight times year-ly with a circulation of 200,000; *Spa* is

bimonthly and has a circ of 85,000; *Resorts* is an annual with a 340,000-circ distribution; Biannual *Islands Weddings* distributes 200,000 copies. World's publications include *Saveur*, *Garden Design*, *Sailing World* and *Sport Diver*.

Hearst to Launch Italian Home Mag in U.S.

Hearst Magazines will team up with Italian publisher Mondadori Italia to launch *Interni*, the first American edition of the Italian home design magazine. *Interni* will be sent polybagged to 400,000 subscribers in the June issues of Hearst's *Esquire*, *Harper's Bazaar*, *House Beautiful* and *Veranda*. *Interni* will reach readers in the top 20 markets around the country and will target upscale, college-educated readers with a household income of \$75,000 or more. Valerie Salem-bier, senior vp, publisher of *Bazaar*, is the publisher of *Interni*; Gilda Bojardi, editor in chief of the Italian *Interni*, will also head up the U.S. edition.

NFL Draft Most-Watched Ever for ESPN

The National Football League Draft coverage on ESPN and ESPN2 this past weekend was the most-viewed in the cable networks' history of televising the event—with 31.4 million people watching at least a portion of the 17-plus hours of coverage over a two-day period. Viewers were up 8 percent over last year, the previous record (28.9 million), and up 23 percent over two years ago and 33 percent over three years ago. ESPN's noon to 7 p.m. segment on April 24 averaged 3.3 million households, up 11 percent over last year, earning a 3.8 rating, up 9 percent. ESPN2's 7 p.m. to 10:24 p.m. segment on the same date recorded a 1.1 rating. On Sunday, ESPN from 11 a.m. to 1 p.m. scored a 2.1 rating, and ESPN2 finished off coverage with a 1.1 from 1 p.m. to 5:45 p.m.

Budget Living Raises Rate Base

Budget Living will raise its circulation rate base to 500,000, from 450,000 effective with the August/September issue. This is the third increase since the bimonthly launched in October 2002.

ABC Radio and Movies.com Partner

To extend its brand beyond the Internet, Movies.com is headed for radio through a deal with ABC News Radio. ABC News Radio will produce four 60-second entertainment updates per week based on branded content from the movie Web site. The updates will air on Monday, Wednesday, Thursday and Friday. ■

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Shelter From the Norm

Media buyers are intrigued by Time Inc.'s latest project, *Cottage Living*, but first have to get past the name

WHILE A FUSS HAS BEEN MADE OVER THE SEPTEMBER LAUNCH OF TIME INC.'S WOMEN'S service title *All You* and the likely revival of *Life* as a weekend newspaper supplement, the company has also quietly geared up to start *Cottage Living*, a 500,000-circulation shelter lifestyle magazine that hits news-

stands Aug. 29. Published by Time Inc.'s Birmingham, Ala.-based Southern Progress, publisher of *Southern Living*, *Coastal Living* and *Sunset*, *Cottage Living* will roll out two issues this year, with plans next year to raise its rate base to 650,000 and increase its publishing frequency to nine times yearly; in 2006, *CL* will jump to 900,000 and will publish 10 times yearly. While Time Inc. hardly rushes into launches, *Cottage Living* may make the record books, having slogged through four years of off-and-on development before beating five other projects in contention.

Time Inc.'s rationale for greenlighting the project is simply that it fills an editorial void. "We don't have an entry in that kind of young, married, lifestyle area," explains Isolde Motley, Time Inc. corporate editor. Equally enticing, she says, is that the magazine is "not just about style, but a way of life. It's unpretentious," she adds. "It's the way people really

live. Real people don't use decorators; real people don't use architects."

The *Cottage Living* team promises this won't be any garden-variety shelter magazine. "This will be the bible for relaxed, informal living, which is the way Americans live today," says Eleanor Griffin, *CL* vp and editor. "This is to help readers find their own style."

But one hurdle the new magazine may need to overcome is its name. *Cottage*, to some media buyers and prospective readers, connotes a lakeside, or secondary home. "I think initially people will really have to open the pages of the book," says Brenda White, Starcom vp, media director. "*Cottage Living* may have a bit of a newsstand challenge."

Griffin insists that cottages can be broadly defined. "When you ask 20 women what a cottage is, you will get 20 different answers," she says. "Cottages come in all different styles, and it's not just about picket fences and win-



Doily-free zone: Griffin says the home magazine will show relaxed, tasteful decor and will offer readers renovation and design tips, as well as a heaping dose of lifestyle content.

dow boxes. 'Cottage' has a warm feel."

Inside, the magazine's stories and departments will run the gamut, from gardening and classic American recipes to renovation tips and design. *Cottage Living's* pages, Griffin promises, "will be a glue-gun-free zone," with "no doilies, ducks or geese."

Cottage Living will have some stiff competition from other new shelter entries. Until

60sec. With



Michael Caruso Editor in Chief, *Men's Journal*

Q. How have you begun to return the magazine to its adventure roots since joining as editor in December?

A. The photography is bigger and bolder, and more fun. We've got the luxury of having a large format, so I'm trying to take advantage of that. We've moved the adventure section up to the front, so it's the first dozen or more pages each month. It re-identifies us as a specialist in adventure travel. And we've expanded the gear section.

Q. Has your cover strategy changed? **A.** We're getting a higher caliber of celebrity. We're really getting A-list stars. Mel Gibson was in March; Owen Wilson was in April, and The Rock is on the May cover. **Q.** In last year's second half, newsstand sales were down 25 percent to 71,000. How are your issues selling now?

A. We're up over 30 percent, selling about 80,000 monthly. We had a real hit with Mel Gibson. He sold about 87,600. **Q.** American Media Inc.'s Muscle & Fitness boasts California Governor Arnold Schwarzenegger as its executive editor, and now I hear you're going to put Sen. John McCain (R-Ariz.) on your masthead. What's up with that? **A.** Schwarzenegger's supposedly the editor of the magazine. John McCain has a long association with the magazine. We're excerpting his new book, *Why Courage Matters*, in the May issue, so I thought it might be a nice idea to make it official. He was also one of our toughest guys in that March Mel Gibson issue.

Q. Well, you also named Sen. Hillary Clinton (D-N.Y.) as one of your toughest guys. Are you going to put her on the cover? **A.** [laughs] She could probably kick most of the other guys' asses. But no, I don't think she's going to make the cover of *Men's Journal*.

Mediaweek Magazine Monitor

WEEKLIES MAY 3, 2004

recently, the category was largely comprised of upscale magazines such as Condé Nast's *House & Garden*; *Elle Decor*, published by Hachette Filipacchi Media; and the more country-flavored *Country Home* from Meredith Corp. Now, *Cottage Living* will also compete against a host of new magazines, including *O, The Oprah Magazine's* biannual shelter spinoff *O At Home*, publishing May 11 by Oprah Winfrey and Hearst Magazines; *Happy Home*, published this fall by American Media Inc.; and next year's *Lucky*-inspired home shopping magazine, published by Condé Nast. Also in the mix is Time Inc.'s *In Style* spinoff, the biannual *In Style Home*, currently on stands.

But because of its lifestyle emphasis, *Cottage Living* will attempt to branch out from shelter's endemic advertisers to include travel, financial services, packaged goods, retail and apparel, says vp, publisher Stephen Bohlinger. The open rate for a full-color page is \$30,000; his goal is 100 ad pages for the first issue. Bohlinger is trying to make sure the first few issues are fat with advertising by offering them a real deal: buy a page in each of the first two issues for a combined rate of \$40,000 or the first three issues for \$45,000 and get that investment back in incremental 2004 advertising credits in any Southern Progress title.

Some buyers are biting. "The charter ad offer made it feasible," says Steven Lerch, vp, manager of print media at Campbell Mithun, who will be running Interstate Bakeries in *Cottage Living*. But Lerch adds he will be watching the title closely. "Is this just going to turn into another shelter book that reaches the country home market, or second-home market, or something new as the mission statement promises?" he wonders. "That's what we're going to be looking at." —LG

Motor Head

Car's MacKenzie joins MT

Motor Trend has ventured across the pond to replace editor in chief Kevin Smith, who last week was promoted to editorial director of Primedia's Performance Automotive Group after recently redesigning the magazine. In his new role, Smith will oversee the editorial direction of the group's 50-plus car and motorcycle titles.

But the changes will not be immediate. Smith will be juggling both roles until his suc-

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek®	3-May	66.67	5-May	49.08	35.84%	943.33	887.97	6.23%
The Economist	24-Apr	59.00	26-Apr	31.00	90.32%	743.00	676.00	9.91%
Newsweek ^E	3-May	29.46	5-May	30.68	-3.98%	686.80	644.91	6.50%
The New Republic®	3-May	5.33	5-May	7.32	-27.19%	79.57	96.35	-17.42%
Time ^F	3-May	57.44	5-May	53.56	7.24%	794.65	752.03	5.67%
U.S. News & World Report	3-May	32.67	5-May	31.42	3.98%	537.65	437.49	22.89%
The Weekly Standard	26-Apr	6.00	28-Apr	7.33	-18.14%	94.09	103.30	-8.92%
Category Total		256.57		210.39	21.95%	3,879.09	3,598.05	7.81%

SPORTS/ENTERTAINMENT/LEISURE

AutoWeek	3-May	22.68	5-May	20.72	9.46%	383.38	396.72	-3.36%
Entertainment Weekly	30-Apr	55.95	25-Apr	45.91	21.87%	540.23	549.89	-1.76%
Golf World	30-Apr	14.83	2-May	25.28	-41.34%	420.03	412.06	1.93%
New York	3-May	52.00	5-May	41.00	26.83%	861.85	784.62	9.84%
People ^N	3-May	73.11	5-May	88.47	-17.36%	1,119.02	1,205.13	-7.15%
Sporting News	3-May	16.00	5-May	15.92	0.50%	283.42	244.83	15.76%
Sports Illustrated	3-May	24.79	1-May	31.67	-21.72%	785.21	776.56	1.11%
The New Yorker	3-May	39.70	5-May	38.64	2.74%	665.39	689.13	-3.44%
Time Out New York	28-Apr	69.31	23-Apr	81.25	-14.69%	1,027.29	1,109.71	-7.43%
TV Guide	2-May	36.41	3-May	51.53	-29.34%	820.74	868.38	-5.49%
Us Weekly	3-May	26.33	5-May	17.40	51.32%	479.30	430.35	11.37%
Category Total		431.11		457.79	-5.83%	7,385.86	7,467.38	-1.09%

SUNDAY MAGAZINES

American Profile	2-May	11.65	4-May	8.75	33.14%	171.15	160.50	6.64%
Parade	2-May	10.46	4-May	17.00	-38.47%	231.45	254.16	-8.94%
USA Weekend	2-May	9.42	4-May	12.28	-23.29%	215.62	222.78	-3.21%
Category Total		31.53		38.03	-17.09%	618.22	637.44	-3.02%
TOTALS		719.21		706.21	1.84%	11,883.17	11,702.87	1.54%

E=estimated page counts; N=2003 figures include American Idol newsstand-only special, 4.47 pages; @=one fewer issue in 2004 than in 2003

BIWEEKLIES MAY 3, 2004

	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	26-Apr	39.51	28-Apr	55.65	-29.00%	416.94	443.59	-6.01%
Forbes ^F	26-Apr	103.35	28-Apr	73.51	40.59%	1,024.63	869.54	17.84%
Fortune	3-May	113.03	12-May	103.48	9.23%	1,068.17	1,015.47	5.19%
National Review	3-May	15.67	5-May	10.50	49.21%	142.74	123.32	15.75%
Rolling Stone	29-Apr	45.98	1-May	30.18	52.35%	386.69	358.23	7.94%
CATEGORY TOTAL		317.54		273.32	16.18%	3,039.17	2,810.15	8.15%

F=2004 YTD includes 4/19 issue of 74.5 pages

CHARTS COMPILED BY AIMEE DEEKEN

cessor, Angus MacKenzie, currently editor in chief of Emap's U.K.-based *Car* magazine, joins *Motor Trend* in August.

MacKenzie was chosen largely because of his impressive global track record, says Lou Mohn, Consumer Automotive Group president. Prior to *Car*, MacKenzie served as editor of Australia's *Wheels*. "The automotive industry is truly becoming global, as well as the fact that *Motor Trend* itself as a brand is extending out beyond the U.S. borders with editions in China, Latin America, Mexico and Indonesia," says Mohn. "We think Angus can take it into the next phase of our upward momentum."

MacKenzie joins the magazine following the February redesign, which included upgrading the paper stock and an investment in photography. And more changes by MacKenzie

are likely. Mohn says he wants to incorporate some of *Car's* edginess into its editorial.

"I come from a background where we tended to tell it like it was, and I just want to try to sharpen it up a little bit," says MacKenzie. "I think there's room to improve the execution of *Motor Trend*. I think the market is ready for that."

Motor Trend's paid circulation dipped 1.6 percent to 1.26 million in last year's second half, according to the Audit Bureau of Circulations. Newsstand sales fell 4.5 percent. Rival *Car and Driver*, published by Hachette Filipacchi Media, declined 1.3 percent to 1.37 million, and single-copy sales skidded 13.8 percent. On the ad front, *Motor Trend's* pages through May rose 12.9 percent to 464, reports the *Mediaweek Monitor*. *Car and Driver* is also up, 4.6 percent to 467. —LG

mr. television

BY MARC BERMAN



To Be Young Again

I REMEMBER A CONVERSATION I ONCE HAD WITH NBC ENTERTAINMENT HONCHO JEFF Zucker. It was Friday, Sept. 23, 1994. I was working at NBC in research, Zucker was running the *Today* show, and *Friends* had just premiered the night before. "Great show, that *Friends*. A funny ensemble, good

acting, clever writing... I bet it lasts 10 years," said Zucker. "Sure," I said with a laugh, adding under my breath, "Like you'll be running this network in 10 years."

Although I can't say I was ever the biggest fan of *Friends* (I sometimes found it annoying), I won't deny that the comedy helped change the face of television. At a time when *Seinfeld*, *Home Improvement* and *Roseanne* ruled prime time and advertisers were beginning to position their dollars on more demo-specific programs, a successful sitcom about six twentysomethings ignited an already growing interest in attracting younger demos. Instead of looking for a show with the most viewers, advertisers found in *Friends* the epitome of a wrinkle-free series that could suck in adults 18-34 and 18-49 en masse.

Success breeds imitation, and with the mania to attract the youth of America taking over Madison Avenue, every network in town was looking for its own version of *Friends*. Remember *The Single Guy*, *Union Square*, *Jesse* and *Inside Schwartz*, which all tried to follow *Friends* on NBC? Or ABC's *Townies* and UPN's *Guys Like Us*? Even CBS tried to wash the gray out of its audience with former *Facts of Life* star Nancy McKeon in 1995's *Can't Hurry Love*.

Although none of these wannabes found much of an audience, the success of the golden six (that includes you too, Ross) still told advertisers they should chase the young adults at all costs. Households and viewers were now irrel-

evant; young adults were more important than ever before, despite the failure of all the *Friends* clones. While stylists across America will credit the series for changing the way women wore their hair (temporarily), I personally think of *Friends* as instrumental in changing the way advertisers buy television.

I also contend that the departure of *Friends* this week—not to mention *Frasier* next week and *Sex and the City*, which signed off of HBO in February—signals the beginning of a potential, and worrisome, sitcom drought. I wonder how or when the sitcom genre will rebound if *Everybody Loves Raymond* also calls it quits next season and reality continues to take over. As much as I like reality—and *Survivor* pulled me away from *Friends* three years ago—I'm not foolish enough to believe the genre will find an audience in repeats. That said, the networks need to start focusing more on how they can get quality comedies back into prime time.

Fox appears to have found one scripted show—*The O.C.*, which, granted, isn't a comedy—that stands to become as big a draw of young-adult viewers as *Friends*. Much as I have tried, though, I just can't get addicted to *The O.C.*, which wraps up season one this week.

Although my TV tastes tell me I should be enjoying this show (after all, I never missed an episode of *Dallas*, *Knots Landing*, *Dynasty* before the ludicrous Moldavian massacre, *Beverly Hills, 90210* during the Shannon Doherty years, or *Melrose Place* before Kimberly Shaw blew up the apartment complex), this tale of a brooding blue-collar teenage misfit living with an upscale family in picturesque Newport Beach, Calif., just doesn't reel me in.

Although age could be a reason for my distance from *The O.C.* (I only have seven years left until the networks consider me obsolete), I was in fact one of the handful of viewers who watched *Titans*, the failed Aaron Spelling NBC drama in 2000 that was supposed to resuscitate the serialized genre. And I never miss an episode of HBO's *The Sopranos*, which at the risk of being whacked is nothing more than a high-quality serial. So I don't think it's my age. I think it's *The O.C.* I just don't like it.

Here's why: the characters are practically cardboard cutouts (the hunk, the nerd, the jock, the innocent babe). The background music's too obtrusive (I must be getting old). There are too many fistfights—even Rocky didn't brawl this much. The acting is wooden. And Peter Gallagher's hair needs a good trim. In other words, this viewer hungers for the old days of small screen angst.

While I will tune in this week to see how *The O.C.* ends, I doubt I'll stick around next season. Even so, with reality busting out all over and successful comedies falling off the networks, I congratulate Fox for resuscitating the serialized drama and finding a new program magnet for young-adult viewers. As Paula Abdul might say, "Good job, Fox. I'm proud of you." ■

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

Advertisers found in *Friends* the epitome of a wrinkle-free series that could suck in young adults en masse.

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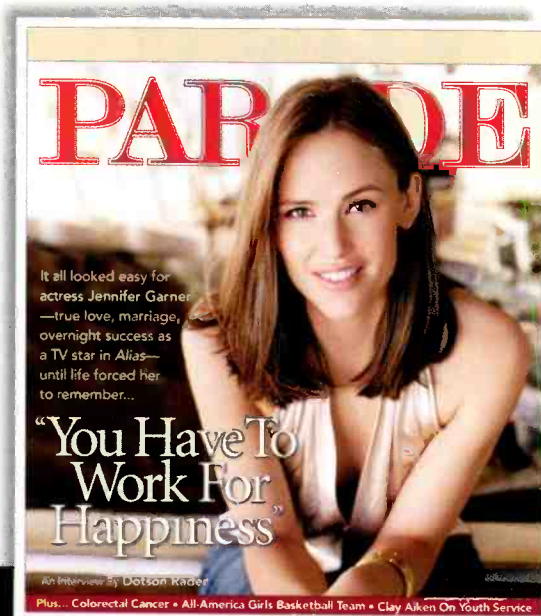
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